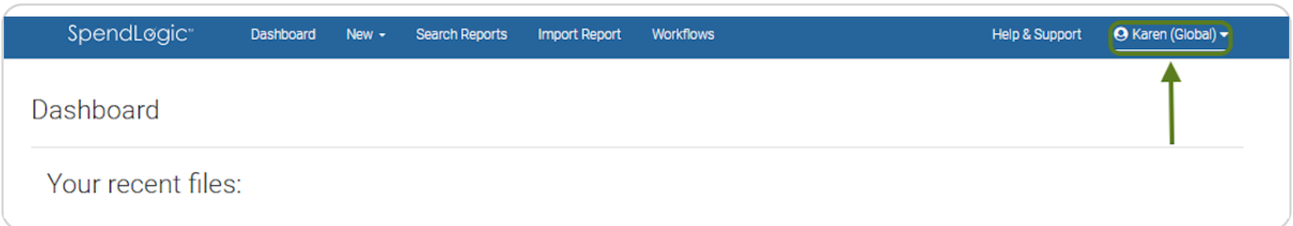
Log into SpendLogic

6 Steps

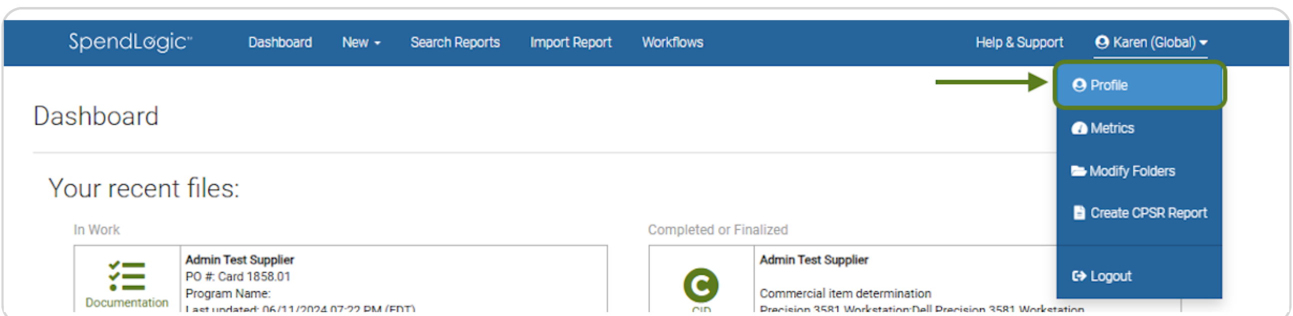
STEP 1

Click on your Name in the upper right corner of the SpendLogic tool bar.



STEP 2

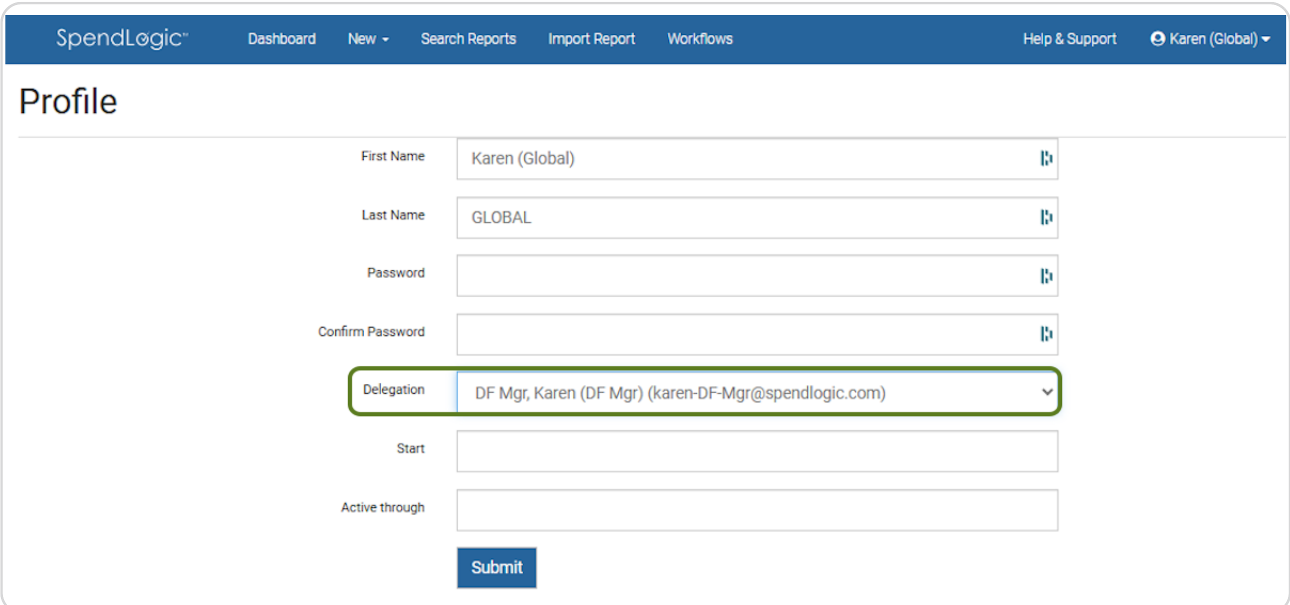
Select Profile



STEP 3

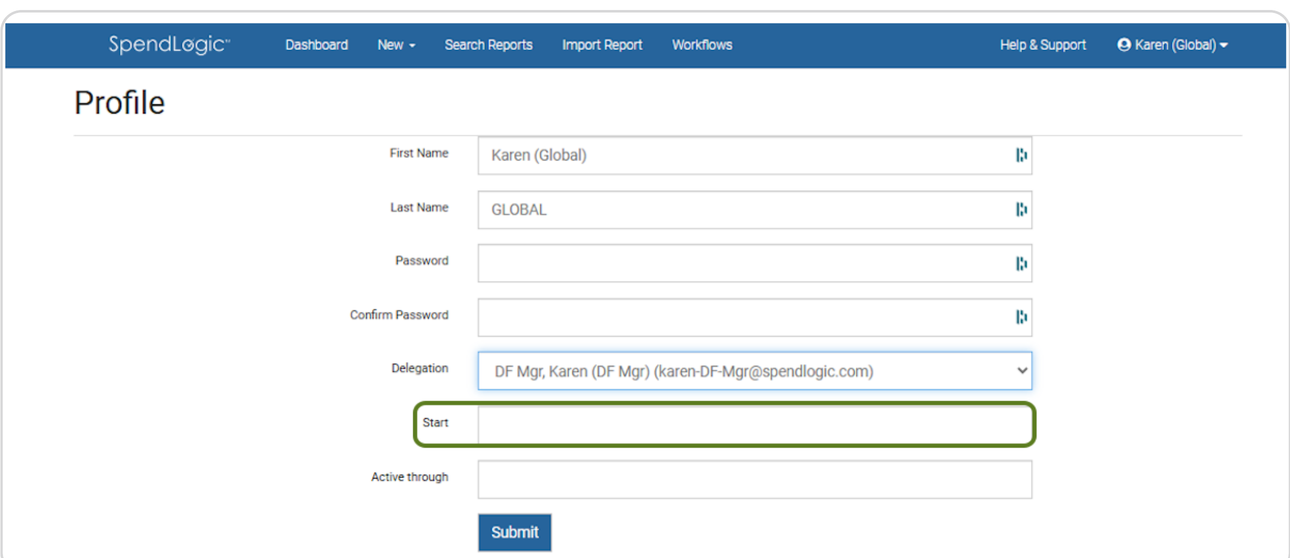
Navigate to "Delegation" and select the User from the drop down to whom you are delegating your review authority.

NOTE: Your delegation should align with your company's policy on delegation of authority/responsibility.



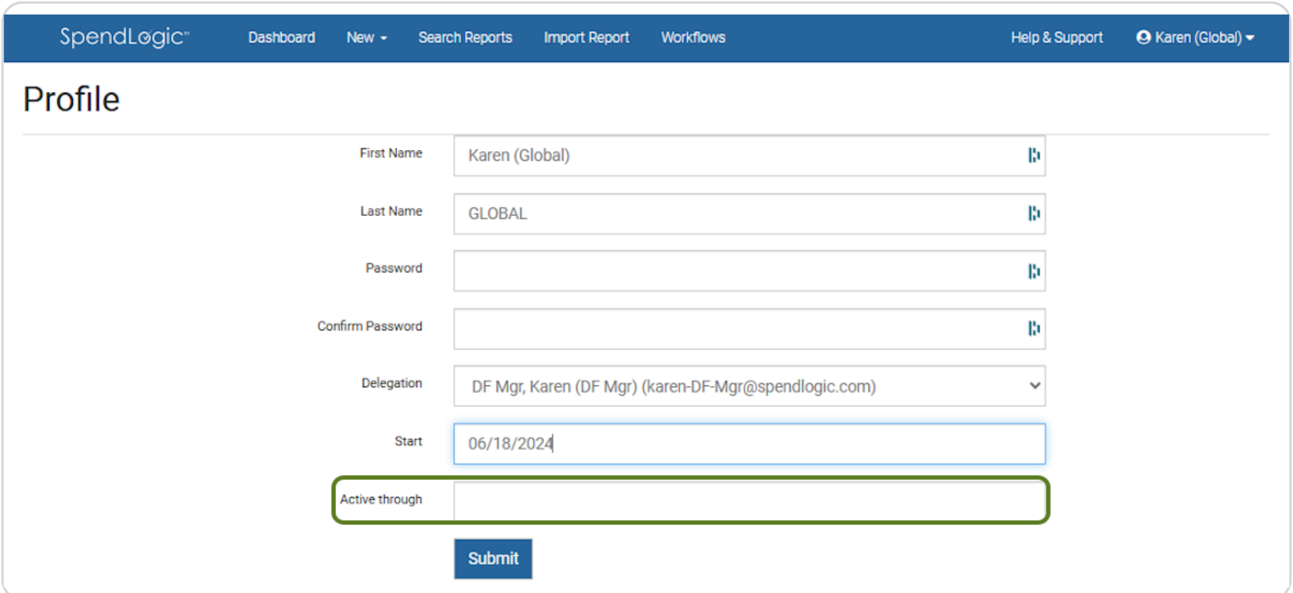
STEP 4

Start Date: Enter the date the delegation should commence.



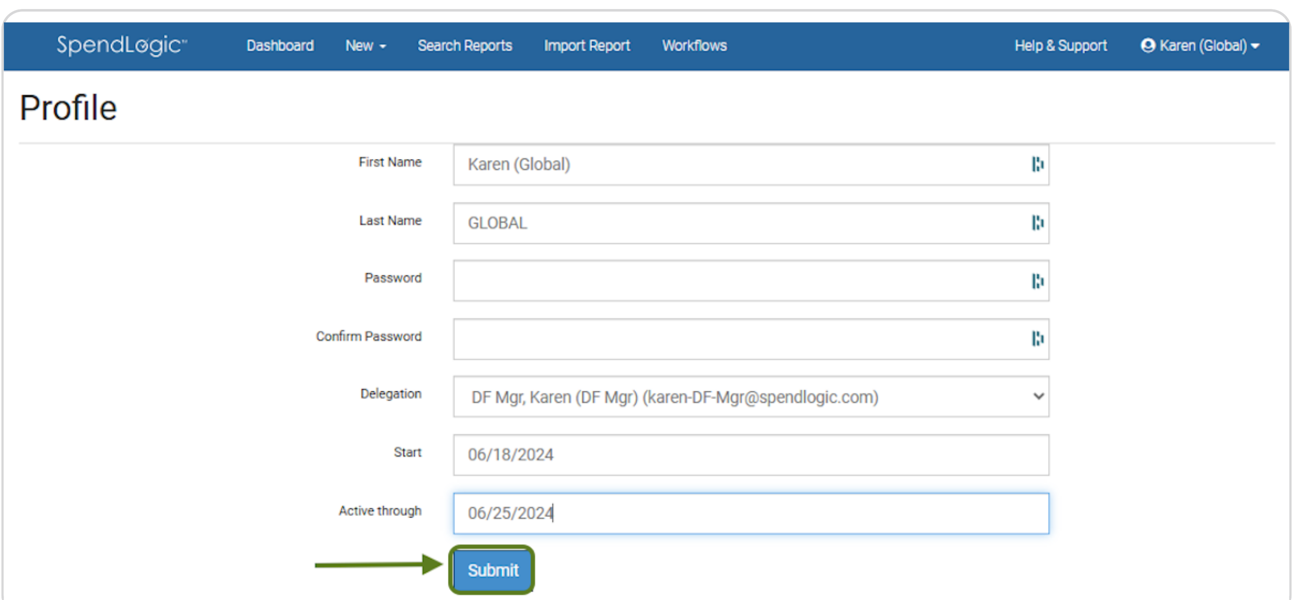
STEP 5

Active Through: Enter the date the delegation should end.



STEP 6

Click on Submit to affect the delegation.



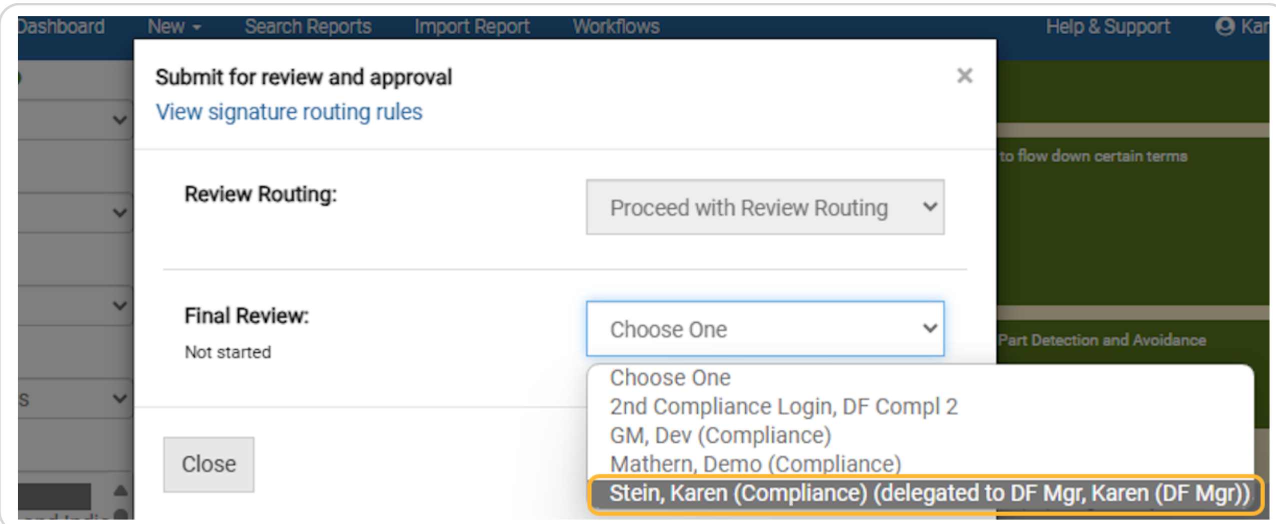
WHAT WILL THE USER SEE?

1 Step

When the User has completed a Documentation Folder, they will Submit for review as normal.

STEP 7

If a Delegation is active, the User will see both the Delegator's Name and the Delegatee's Name in the drop down.



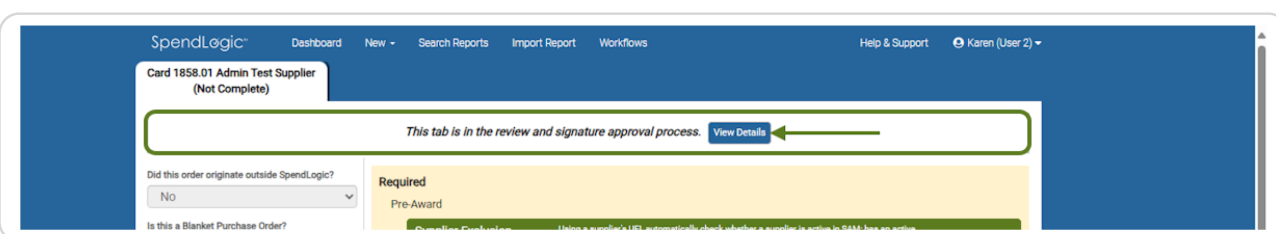
VIEW DETAILS

2 Steps

Anyone, including the User, who can view a Documentation Folder can see whether the review has been delegated.

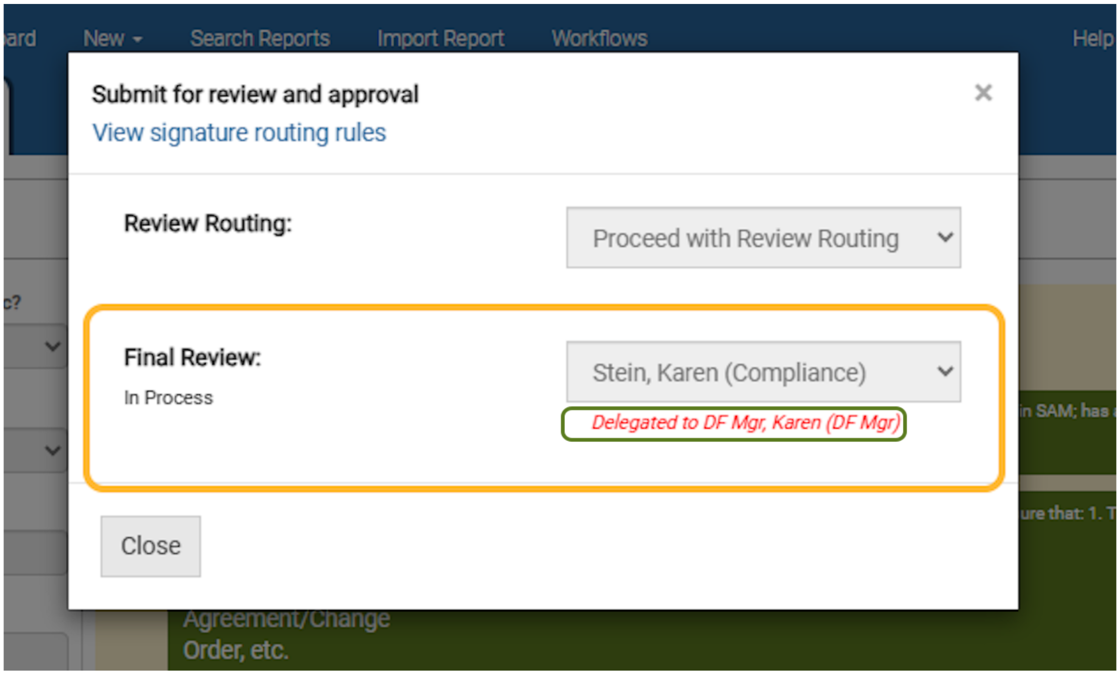
STEP 8

Click on View Details



STEP 9

View Details will show to whom the review is assigned as well as to whom it is delegated.



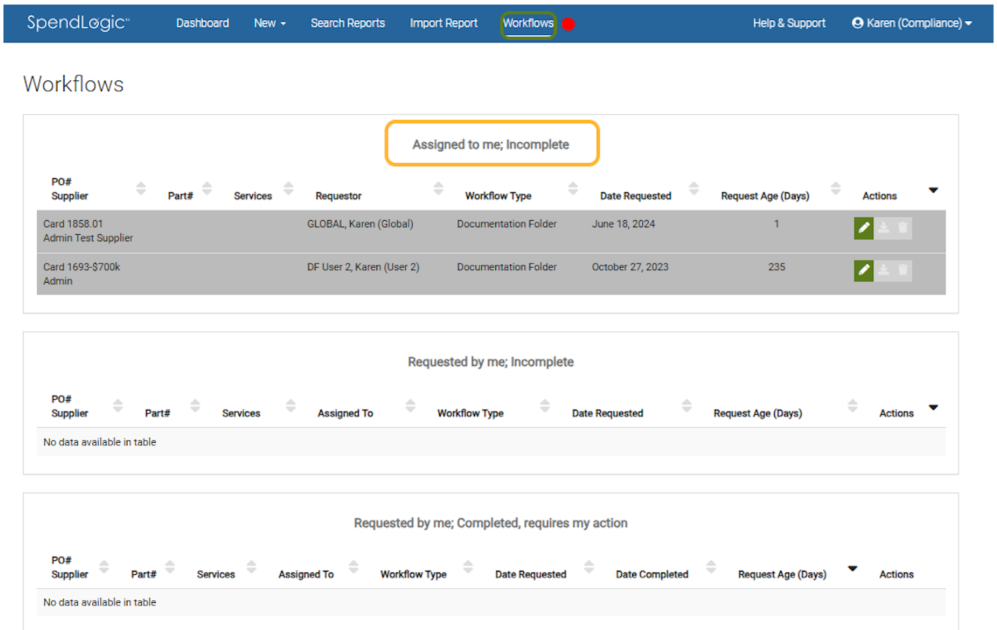
DELEGATOR WORKFLOW

3 Steps

The reviewer will have the review request appear in their workflow since the review request is to the reviewer yet is delegated to another review.

STEP 10

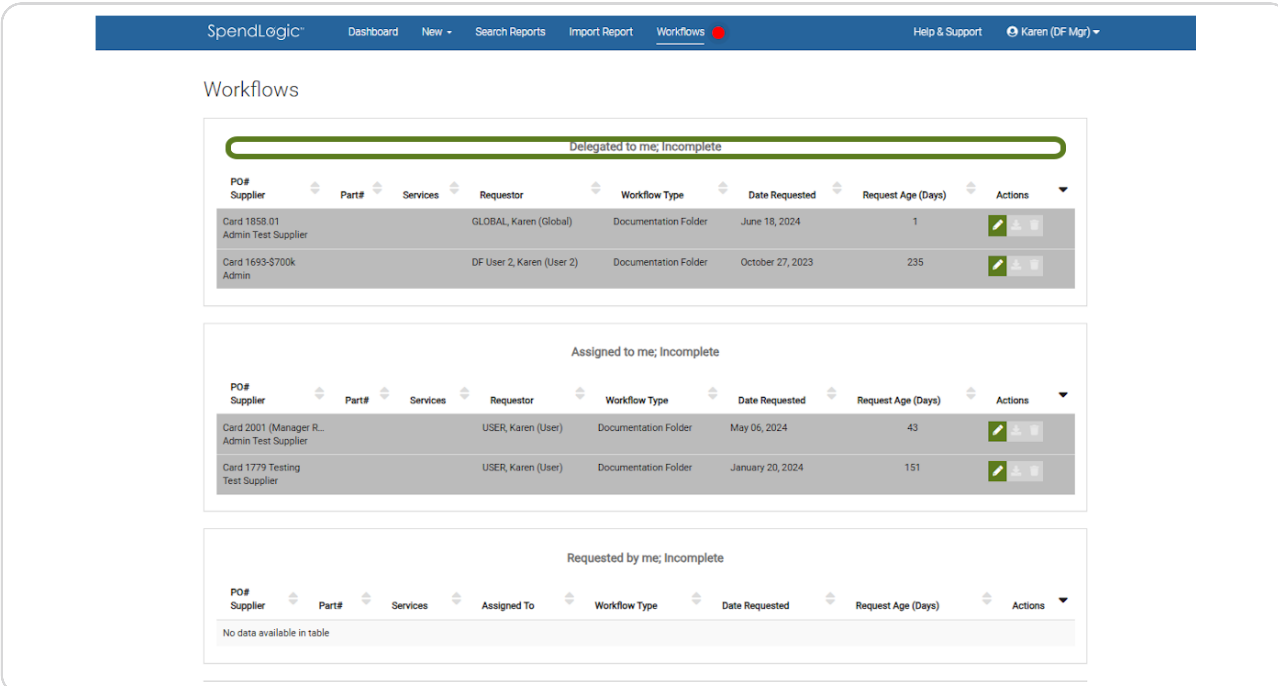
Click on Workflows



STEP 11

WORKFLOW | DELEGATEE

The person to whom a review has been delegated will see a requested review in a new "Delegated to me; Incomplete" section in their Workflows.



STEP 12

<u>The review will be performed as normal and routing back to the buyer OR onward to the next reviewer will occur. Refer to How to Review a Documentation Folder (SpendFile) under Help & Support.</u>

SpendLogic