

Sourcing Review Roles

Overview of each employee's role in the Sourcing Review Workflow.

Requester

Once a Sourcing rule is configured, requisitions that trigger that sourcing rule will be flagged for review. Before submitting the requisition, Requesters will receive a notification on the Requisition draft letting them know the requisition will go through Sourcing Review. (shown on right)

Recent Requests				
1000001166	Requester Training	1000001166	\$3,000.00 USD	Sourcing Review
1000001165	Requester Training	1000001165	\$240.45 USD	Draft

Purchase Request 1000001166
Created on 11/01/2019

Request Name: Requester Training 1000001166
Requester: Requester Training
Supplier: CDW Inc.
Shipping Address: Vrooz HQ, Attention: Nichole Tester, 15000 VENTURA BLVD, SHERMAN OAKS, CA 91403-2443, US
 Contact: Nichole.Whitaker@OfficeRequester@..., +1 (818) 555-5555

Reason for Request: [Empty field]

Approvals: Approval Status
Sourcing Approver: James Tripp

Notification: Your Purchase Request has been flagged for sourcing review, it will be sent to James Tripp for sourcing review

#	Description	Supplier	Part No.	Category	Qty	UoM	Unit Price	Del. Date	Total	Action
1	Show Blower	CDW Inc.	0R000303		1	EA	\$3,000.00	11/18/2019	\$3,000.00	[Icons]

Subtotal (USD): \$3,000.00
 Shipping Charges (USD): \$0.00
 Tax(USD): \$0.00
Total(USD): \$3,000.00

While awaiting review, the PR's status will be displayed as 'Sourcing Review'.

Sourcing Approver

Sourcing Approvers will receive email notification when a requisition is ready for review.

SOURCING APPROVER DASHBOARD

Any employees with the Sourcing Approver role will be directed to the 'Approve Requests' view upon login.

There are three tabs within this view 'Pending', 'Approved' and 'Ready for Sourcing'

Approve Purchase Requests
Take action on requests pending your approval and see your past approved/rejected requests

Navigation: [Approve Requests](#) (highlighted), [Shipping Notices](#), [Buy Route](#)

Sub-navigation: [Create Order](#), [Ready for Sourcing](#)

Filter tabs: Pending, Approved, Rejected

Request #	Requester	Created Date	Request Name	Status	Total Amount
1000001173	Requester Training	11/25/2019	Nichole Whitaker	Sourcing Review	\$499.00

'Rejected'. The view will default to 'Pending'.

TAKE ACTION

Click the Request # to view details. Once the requisition is opened, Sourcing Approvers will have several options. (shown on next page)

- **Reject**
- **Edit** (if the global editing option is enabled as shown above)
- **Forward**: Assign to another approver.
- **Approve**

Purchase Request 1000001166 Sourcing Review

Submission Date: 11/03/2019
 Request Name: Requester Training 1000001166
 Requester: Requester Training

Shipping Address: Attention: Nicholas Tester, Wood Hills, 15000 VENTURA BLVD, SHERMAN OAKS, CA 91403-2443, US
 Requester: Nicholas.Whitaker@Veeva.com, +1 (818) 555-5555

Supplier: CDW Inc.
 Purchase Order Number: -
 Reason for Request: -

#	Description	Supplier	Part No.	Category	Qty	UoM	Unit Price	Del. Date	Total
1	Snow Blower	CDW Inc.		OR000303	1	EA	\$3,000.00	11/18/2019	\$3,000.00

Subtotal (USD): \$3,000.00
 Shipping Charges (USD): \$0.00
 Tax(USD): \$0.00
 Total(USD): \$3,000.00

Approval/Rejection Notes
 Add Note
 Notes to Supplier
 Notes from Supplier

Buttons: **Reject** (red), **Edit** (blue), **Forward** (light blue), **Approve** (green)

EDIT A REQUISITION

Click on the line item to view the General, company, accounting and tax information. Make changes as needed

Select 'Edit' to make changes. Then click the description for the line item you wish to edit. (line item details shown on right)

- **Note:** Permission to edit a requisition is a global setting defined by the Purchase Administrator. If disabled by the administrator, the Edit button will not appear for Sourcing Approvers.

Line Item #1 Show Optional Fields

General Information

Type: Product required
 Category: OR000303 - Facilities Supplies required
 Description: Snow Blower required
 Unit Price: \$3,000.00 required
 Currency: USD required
 Quantity: 1 required
 UoM: EA - EA required
 Recommended Supplier: CDW111 - CDW Inc. required
 Buyer Group: General required
 Delivery Date: 11/18/2019 required

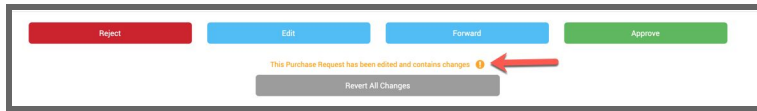
Company Info

Company Code: West Village - West Village required
 Purchasing Organization: A123 - Marketing required
 Plant: West Village - West Village required

'Save Item'.



Once changes have been made a new message will appear below the navigation option. If changes are incorrect, select 'Revert all Changes' to return to the originally submitted requisition.



FORWARD REQUISITION

After review is complete and/or edits have been made, before selecting 'Approve' Select 'Forward' to enable review by another Sourcing Approver.



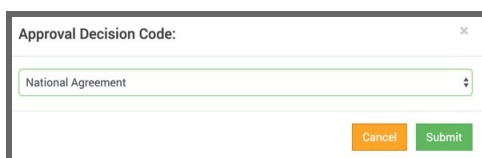
REJECT/APPROVE

Select 'Reject' or 'Approve' and enter a Note for the Requester.

- Completion of a note is optional
 - Any notes will be viewable from the rejection/approval email notification the Requester will receive.



If decision codes are used, Approvers will be asked to select from a predefined list of decision codes.



NEXT STEPS

The requisition will then either convert to Purchase Order or if Approval Workflow is enabled will be directed to the first Financial Approver.