

SmarteFinance Requisition Approval

DOCUMENT APPROVAL PROCESS

OVERVIEW

Smartetools has an electronic document/requisition approval system. BCSD has chosen to take full advantage of this approval system. Beginning with the 2018/2019 school year, all requisitions of any type supported by Smartetools will require electronic approval in order to be processed. In addition, only management will be authorized to approve requisitions. Non-management staff will no longer be authorized to approve requisitions.

This document will describe how to approve or deny a requisition. For more information on each type of requisition, please see the user guides for each requisition type.

LOGGING INTO SMARTE

Smarte is accessed by going to <https://smarte.bcsd.com>. You can access Smarte from any modern web browser and from any location with internet access. In other words, you do not have to be at work to access this website. The website is available from home. Once at this website. You are prompted for a username and password. Your username is your email address less the @bcsd.com. Your password is your normal email password.

Smartetools v: 2.5.6709.24321 - 2.5.5s

Smartetools User Login

Login Name:

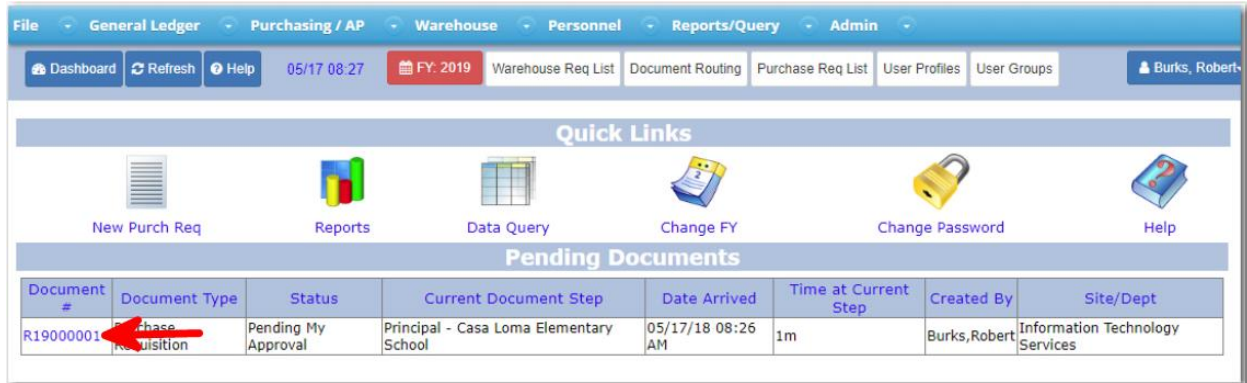
Password:

Login

FINDING DOCUMENTS AWAITING YOUR APPROVAL

Once logged in, you will be taken to the Smarte Dashboard. From this dashboard you can navigate to all of the functions you have access to. Please see the user guides for more information on the specific systems. For the purposes of this documentation, we will concentrate on the Pending Documents area.

The Pending Documents area lists all of the documents that are awaiting your approval. It will have a list of all the documents (ie Purchase Reqs, Warehouse Reqs, etc...) in one place. To approve or deny a document, you first click on the document number.



The screenshot shows the Smarte Dashboard interface. At the top, there is a navigation menu with options: File, General Ledger, Purchasing / AP, Warehouse, Personnel, Reports/Query, and Admin. Below the menu, there are buttons for Dashboard, Refresh, and Help, along with the date and time 05/17 08:27 and the fiscal year FY. 2019. The user's name, Burks, Robert, is displayed in the top right corner. The main content area is divided into two sections: Quick Links and Pending Documents. The Quick Links section contains six icons: New Purch Req, Reports, Data Query, Change FY, Change Password, and Help. The Pending Documents section contains a table with the following data:

Document #	Document Type	Status	Current Document Step	Date Arrived	Time at Current Step	Created By	Site/Dept
R1900001	Purchase Requisition	Pending My Approval	Principal - Casa Loma Elementary School	05/17/18 08:26 AM	1m	Burks,Robert	Information Technology Services

APPROVING OR DENYING THE DOCUMENT

Once you have clicked on the document number, you will be taken to specified document. For the purposes of this example, we will only show a purchase requisition, but all the document types work the same way.

Purchase Requisition

New Edit Save Cancel Search Copy Req Templates History Xactions Notes(0) Print Attachments(0) Notify

Action: Send to Purchasing Department Go

Purchase Requisition has been successfully routed.

Requisition #: R19000001 Go Purchase Order #: Not Assigned Current Step: Principal - Casa Loma Elementary School

Vendor #: 272280

XIT SOLUTIONS, INC.
ATTENTION: SHAWN SANTERRE
4682 CALLE BOLERO, UNIT C
CAMARILLO CA 93012
Phone: (661) 635-0365
Fax: (661) 635-0162

Requested By: Robert Burks

Requested For:

Deliver Site: Information Technology Services

Contract #:

Date Needed: 06/16/2018 Blanket: No

Req. State: - None -

Auto Distribute by Percent: Yes ReCalculate

Accounts					
Line	Pseudo	Account Number	Percent	Amount	PreEncumbrance
1	430265	01-0000-0-1110-1000-4300-022-00	100.00	5,362.50	5,362.50

Items									
Line #	Description	Unit Issue	Qty	Unit Cost	Taxable	Ship Amt	SubTotal	Delete	
1	Test Computer	Ea	10	500.00	Yes	0.00			

Comments:

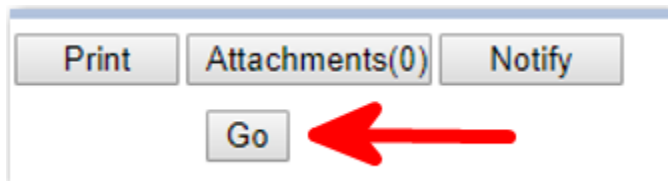
Subtotal: 5,000.00

Shipping Total: 0.00

Tax: @ 7.25% 362.50

Total: 5,362.50

Once you have reviewed the document, to approve it, you click the GO button that is underneath the attachments button.



This will send the document to the next step in the routing processes. You are now done.

If you want to deny the document, you should first add a note to the document explaining the reason. This is accomplished by clicking the **Notes** button located on the Menu bar. Click on this button to display the Requisition Notes page. Click the **New Note** button to display the Note entry area. Enter your note and click the **Save** button. The saved notes will always be displayed when the notes page is accessed from the requisition.

Note	Date	Created By
Please call when PO sent to vendor.	03/12/2018 02:37:53 PM	System Administrator

Once you have added your note, click on the down arrow in the Action area and chose the Return Document option.

Action: Send to Purchasing Department

Send to Purchasing Department

Purchase R

Return Document to New Purchase Req

Go

Once you've chosen this option, click the GO button. This will return the document to the originator.