

A woman with long dark hair is seen from the side, working at a desk. She is looking at a large monitor displaying a map. In front of her is a laptop showing a software interface. To her right is another monitor with sticky notes attached. The desk also has a telephone, a coffee cup, and a pen holder. A desk lamp is positioned above the monitors. The background shows a blurred office environment with windows and other desks.

SMART PO

Show Administrator, Department, Approval flow, and Add User Guide



Link to Log in to SPO and Recommended Browsers

SmartPO url: <https://smartpo.ep.com>

Username and password will be the same as your existing SmartID account

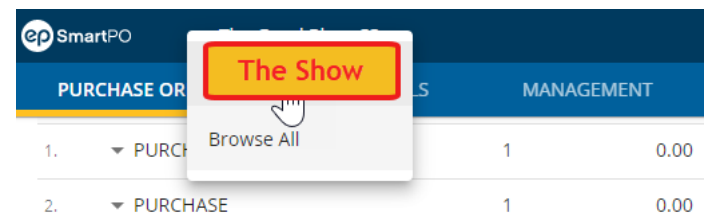
- User must be set up in at least one SmartPO show to log into the product.
- If it is the first time the user is added to SmartPO, they will receive an email to log into SmartPO
- To update or reset first/last name or Google Authenticator. Please contact support.

Recommended Browsers: Chrome, Firefox, MS Edge

- Safari sometimes will create a blank page at log in. However, you can refresh, that will then open up log in screen.

How to Navigate Between Multiple Shows

Go to left hand corner and click on show name:



You will have the option to see the last five (5) projects on the access, drop-down list.

- If you have more than 5 shows, select: "Browse All" option to select Show of choice.

Follow these Three Steps to Setup your SmartPO Show:

1. In order to add users, Department needs to be set-up.
 - A user must be associated with at least one department to be added into the show.
2. At least one Show Administrator must be added in SmartPO at system set-up.
 - This person will be responsible to add all other users.
3. Once Users and Departments are added, you can now create approval flows.

How to Set Up Departments

Show administrator will add departments in SPO

Add New Department:


- Go to: >Management



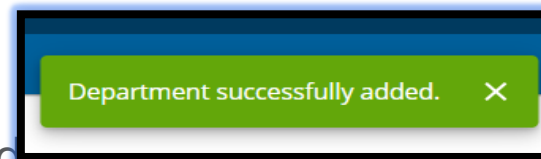
>Departments



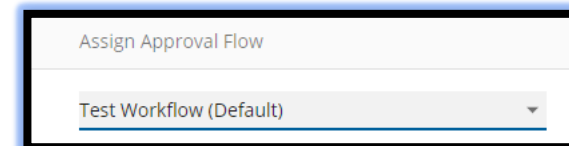
>Enter Name of Department

A form for entering a department name. It has a label "Department Name *" in blue, a text input field containing "NEW TEST", a "CANCEL" button, and an "ADD DEPARTMENT" button.

- Click "Add Department"
- Once saved, message will pop-up informing that your department was successfully saved.

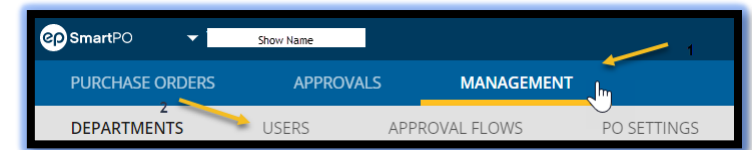


Once department is added, you can **Assign Approval Flow**.

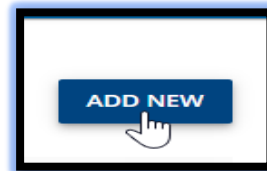
A dropdown menu for assigning an approval flow. It has a title "Assign Approval Flow" and a selected option "Test Workflow (Default)" with a downward arrow.

Show Administrator and How to Add Users

NOTE: Show Admin user will be added to program at time of set up.



1. Select the "ADD NEW" option:

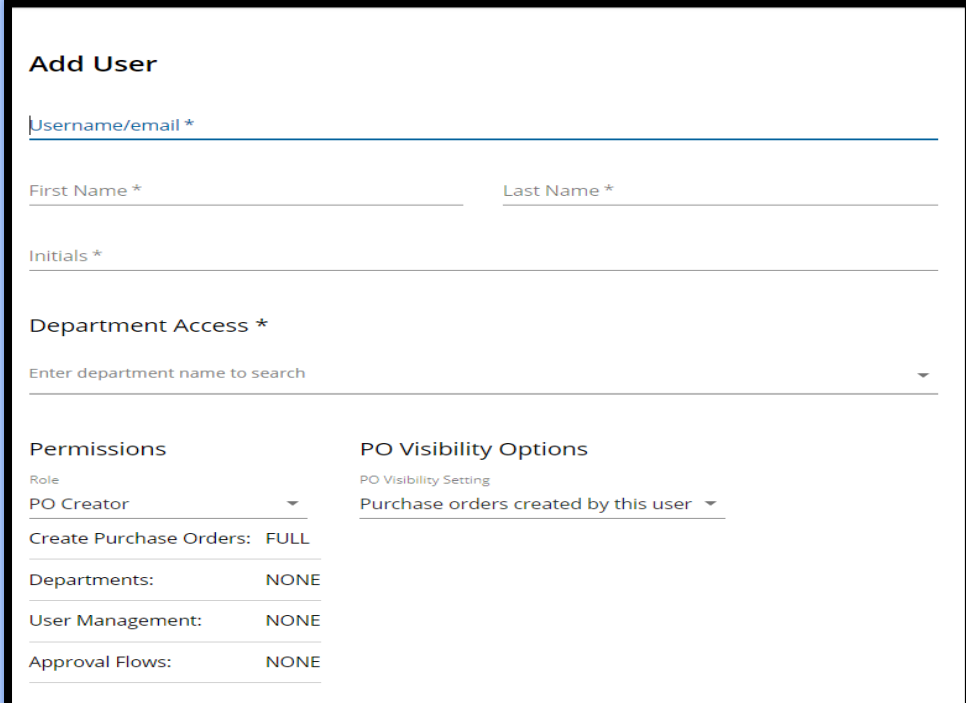


Show Administrator and How to Add Users

2. Type in the user's email address and tab to the next field. If the user is already setup in SmartID their first/last name will populate automatically.

If not, fill in the first/last name and the initials will auto fill.

- If this is the first time the user is added to SmartPO, they will receive an email to log into the system



The screenshot shows the 'Add User' form with the following fields and sections:

- Add User** (Section Header)
- Username/email *** (Text input field)
- First Name *** (Text input field)
- Last Name *** (Text input field)
- Initials *** (Text input field)
- Department Access *** (Section Header)
- Enter department name to search** (Text input field with a dropdown arrow)
- Permissions** (Section Header)
- Role** (Text input field)
- PO Creator** (Text input field with a dropdown arrow)
- Create Purchase Orders:** FULL
- Departments:** NONE
- User Management:** NONE
- Approval Flows:** NONE
- PO Visibility Options** (Section Header)
- PO Visibility Setting** (Text input field)
- Purchase orders created by this user** (Text input field with a dropdown arrow)

Important Note: If User does not have existing SmartID username information, a link will be sent once added to SmartPO asking they register the new Smart ID Account

Show Administrator and How to Add Users

3. You will be responsible to assign department of choice access, Permissions, Role, and PO Visibility options. Please note: Minimum of one department must be added.

Add User

Username/email *

First Name *

Last Name *

Initials *

Department Access *

Enter department name to search

Permissions

Role

PO Creator

Create Purchase Orders: FULL

Departments: NONE

User Management: NONE

Approval Flows: NONE

PO Visibility Options

PO Visibility Setting

Purchase orders created by this user

Important Note: If User does not have existing SmartID username information, a link will be sent once added to SmartPO asking they register the new Smart ID Account

Permissions and PO Visibility Controls

Department Access

Show Admin will assign at least one or more department to the user. If the user is a PO creator, they will be able to create POs for these departments.

You can associate one or more departments to a user.

Add User

Username/email *

First Name *

Last Name *

Initials *

Department Access *

Enter department name to search

Permissions

Role

PO Creator

Create Purchase Orders: FULL

Departments: NONE

User Management: NONE

Approval Flows: NONE

PO Visibility Options

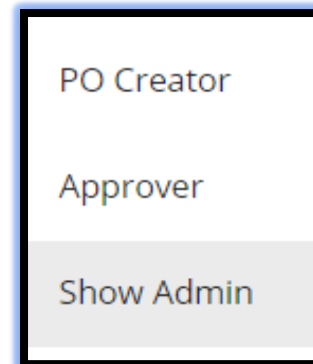
PO Visibility Setting

Purchase orders created by this user

Permissions and PO Visibility Controls

Permissions

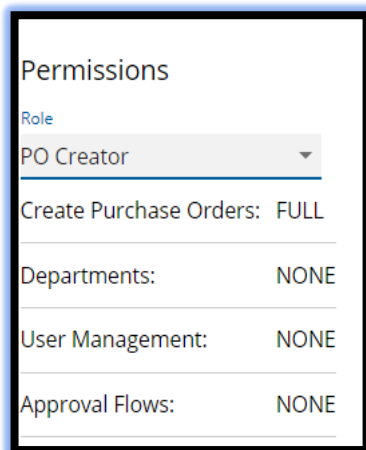
Dictates this user's access to SmartPO screens based on a role.



A vertical dropdown menu with three options: 'PO Creator', 'Approver', and 'Show Admin'. The 'Show Admin' option is highlighted with a grey background.

PO Creator
Approver
Show Admin

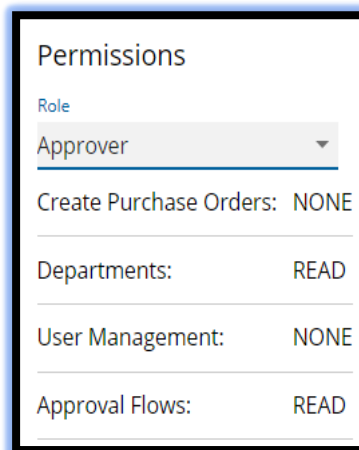
A **"PO Creator"** role allows the user to create POs but not have access to any management screens.



Permissions screen for the 'PO Creator' role. The role is selected in the dropdown. The permissions are: Create Purchase Orders: FULL, Departments: NONE, User Management: NONE, Approval Flows: NONE.

Permissions	
Role	
PO Creator	
Create Purchase Orders:	FULL
Departments:	NONE
User Management:	NONE
Approval Flows:	NONE

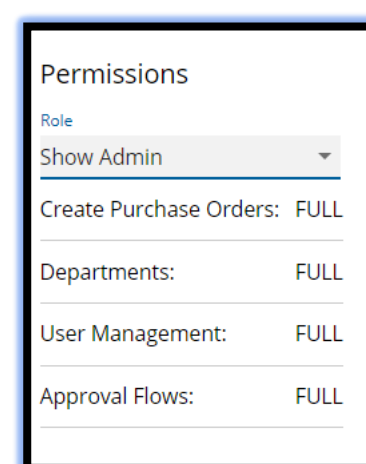
An **"Approver"** role is only given read access to a few screens.



Permissions screen for the 'Approver' role. The role is selected in the dropdown. The permissions are: Create Purchase Orders: NONE, Departments: READ, User Management: NONE, Approval Flows: READ.

Permissions	
Role	
Approver	
Create Purchase Orders:	NONE
Departments:	READ
User Management:	NONE
Approval Flows:	READ

A **"Show Admin"** role gives the user access to all the setup screens and the ability to create POs.



Permissions screen for the 'Show Admin' role. The role is selected in the dropdown. The permissions are: Create Purchase Orders: FULL, Departments: FULL, User Management: FULL, Approval Flows: FULL.

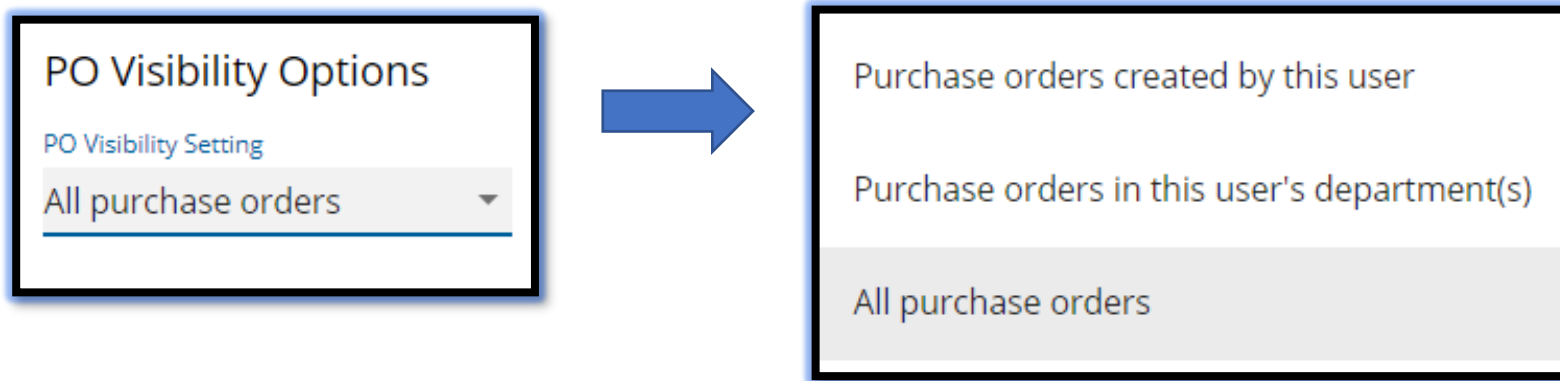
Permissions	
Role	
Show Admin	
Create Purchase Orders:	FULL
Departments:	FULL
User Management:	FULL
Approval Flows:	FULL

Permissions and PO Visibility Controls

PO Visibility

Controls what POs user can see and users that can view a PO in draft can also edit them.

For example, an accountant can see everyone's PO, a department head can see the POs created for their department.



SMART PO: Show Administrator, Department, Approval flow, and Add User Guide



Approval Flow

How It Works, How to Create

Approval Flow Setup

In the **Approval Set up** screen, you can set up as many approval flows as you would like, and assign to a custom approval flow for a specific department.

Approval level structure:

Why might you want multiple levels?

- For example, you may want to control the order of approvers, approver A needs to approve before approver B.
- If order doesn't matter, add all approvers to one level and require they all approve. The PO will not move onto the next level until everyone has provided approval.

Creating an Approval Flow

- Select Approval Flows

APPROVAL FLOWS

- Add New

ADD NEW

The screenshot shows the SmartPO Management interface. The top navigation bar includes 'PURCHASE ORDERS', 'APPROVALS', and 'MANAGEMENT'. Under 'MANAGEMENT', there are tabs for 'DEPARTMENTS', 'USERS', 'APPROVAL FLOWS', and 'PO SETTINGS'. The 'APPROVAL FLOWS' tab is selected. Below the tabs, there is a table titled 'Approval Flows' with columns for 'Name' and 'Show Setting'. The table lists three flows: 'Mark workflow' (Unassigned), 'Test Workflow' (Default), and 'YOUR NEW APPROVAL FLOW' (Unassigned). An 'ADD NEW' button is located in the top right corner of the table area.

Name	Show Setting
Mark workflow	Unassigned
Test Workflow	Default
YOUR NEW APPROVAL FLOW	Unassigned

- Add Approval Flow name

The screenshot shows the 'Add Approval Flow' form. It has a title 'Add Approval Flow' and a subtitle 'New Approval Flow Idea'. Below the subtitle is a text input field. There is a checkbox labeled 'Set As Default Approval Flow'. Below the checkbox is a question: 'How many approval levels are needed in this approval flow?' with a text input field containing the number '0'. There are two asterisked notes: '* Approval emails will go out simultaneously for any approval level that has multiple approvers unless the Send To rule is set to match department.' and '* Adding approvers is required to save an approval flow.' At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

Set As Default Approval Flow

How many approval levels are needed in this approval flow? 0

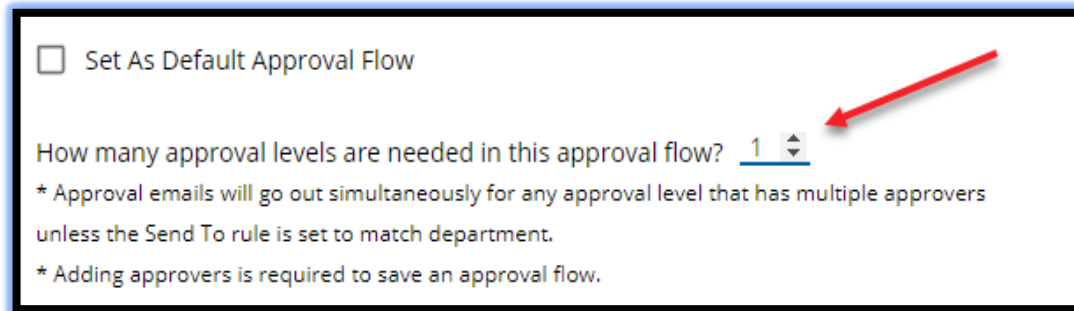
* Approval emails will go out simultaneously for any approval level that has multiple approvers unless the Send To rule is set to match department.

* Adding approvers is required to save an approval flow.

CANCEL SAVE

Options

- Select the "Set as Default Approval Flow" checkbox if this approval flow will apply to all POs.
- Select the number of approval levels needed for the approval flow.
- Under the **Applies To** option, choose which POs should pass through this level. If it's All POs, then select that option. If there's a condition for this level, provide an amount threshold or a category condition.

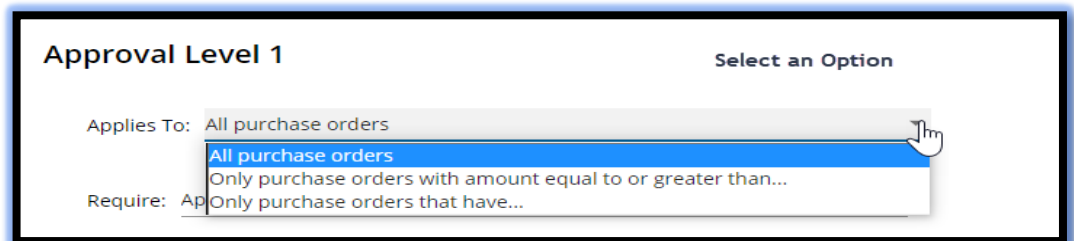


☐ Set As Default Approval Flow

How many approval levels are needed in this approval flow? 1

* Approval emails will go out simultaneously for any approval level that has multiple approvers unless the Send To rule is set to match department.

* Adding approvers is required to save an approval flow.



Approval Level 1 Select an Option

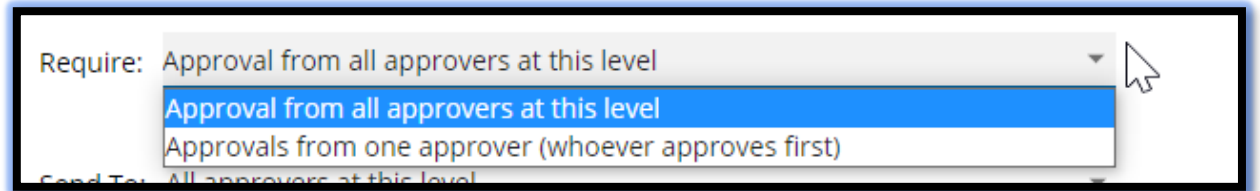
Applies To: All purchase orders

Require: Ap Only purchase orders that have...

Options

- Under the **Require** option, select how many approvers are needed for this PO to move onto the next level.

Only one needs to approve or everyone in this level needs to approve.

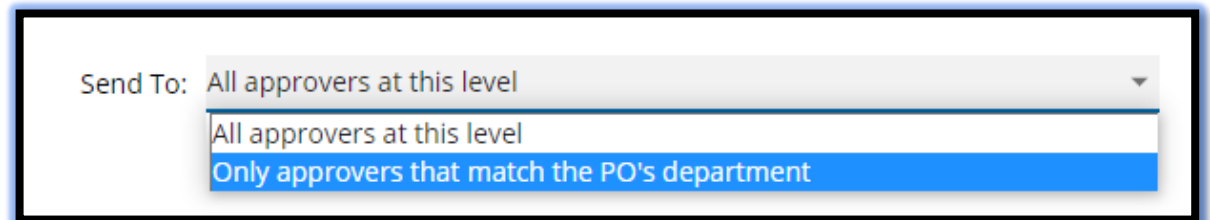


Options

- **Send To option**

Controls who is notified to approve the PO. In most cases it will be all approvers at this level. But if you're setting up an approval flow that will apply to multiple departments, you can select **Only approver that match the PO's department**.

When you assign all the department heads into one level, only the approver that matches the PO's department will be required to approve. This saves time by not having to create a custom approval for every department.



Send To: All approvers at this level ▼

- All approvers at this level
- Only approvers that match the PO's department

Options

Category Condition

A custom field that will allow users to add a conditional approval with a category

- The intention is to give flexibility when building approval and sometimes there exceptions where additional approval is needed
- A good example of this is XXX Studio, they normally have a 4 level approval flow for their POs but for wrap parties specifically, they have a 7 level approval flow
 - So with category conditions, the show can add a category called "wrap party" and build in the extra approvals to their standard approval flow and put the "wrap party" category condition
 - When a PO is created, it will be associated to the "wrap party" category on the PO creation screen and once submitted for approval it must go through all 7 levels to be approved

Options Settings

In the Approval Flow you have the following options:

- **Applies to:** which POs require approval at this level?
- **Require:** how many people in the level needs to approve this PO?
- **Sent to:** which approvers should be notified to approve this PO

Options Settings

Applies to: Which POs require approval at this level?

- **All POs**
 - Every PO must get approval from this level
- **Only POs with amount equal or greater than...**
 - Users can specify an amount threshold where, if the PO is at or above the amount, it will require approval at this level
- **Only POs that have...**
 - Users can create custom categories for this field to build out a studio's workflow
 - Ex. Studio YYY has a category condition where if a PO contains an "equipment package", it requires additional approval
 - When the workflow is created, a condition will be set require approval for all POs that have "equipment package" selected for the "PO contains" field

Options Settings

Require: How many people in the level needs to approve this PO?

- **All approvers in this level**
 - Everyone assigned to this level must approve the PO before it can move onto the next level
 - This is good when you may have an accountant and the UPM in one level, both have to approve but they can approve in any order
- **Approval from one approver (whoever approves first):**
 - Out of everyone in the level, only one needs to approve for the PO to move onto the next level
 - This is good when you have a primary approver and a backup, either one can move the PO forward to the next level

Options Settings

Sent to: Which approvers should be notified to approve this PO

- **All approvers at this level**
 - Everyone assigned to this level will be notified to approve
- **Only approvers that match the PO's department**
 - This option is intended for a standard workflow (across departments) where instead of having to build a custom flow for each department, you can put all the department heads in one level and only the relevant department head is notified to approve based on the department on the PO

Important Notes

Once first approval flow is added, it will be **marked as default and applied to all existing departments**. Any additional approval flows created will need to be assigned manually. For example, post approval flow, needs to be assigned manually after initial one created. Go back to Management>Departments to assign.

If an approval flow is modified while POs are submitted, the current POs **will not update with the new flow**. If they need to pick up the new flow, they will have to reset back to draft and resubmitted for approval.

Important Notes

The race condition where in a group of approvers in one level, you can only require one of them to approve for the PO to move onto the next level.

"Only approvers that match the PO's department"

If approval is the same for multiple departments, you can create a level for all department heads (first approval) so only the department head will be notified when a PO that matches their department goes through the approval process.

Important Notes

Users become Approvers when they're associated to an Approval Flow

- There is an 'Approver' role that only controls **access** to SPO screens; but assigning the role does NOT make the user an approver

Approval Flows can be modified at any time during production, but POs that are already in the approval process will NOT update to the modified flow

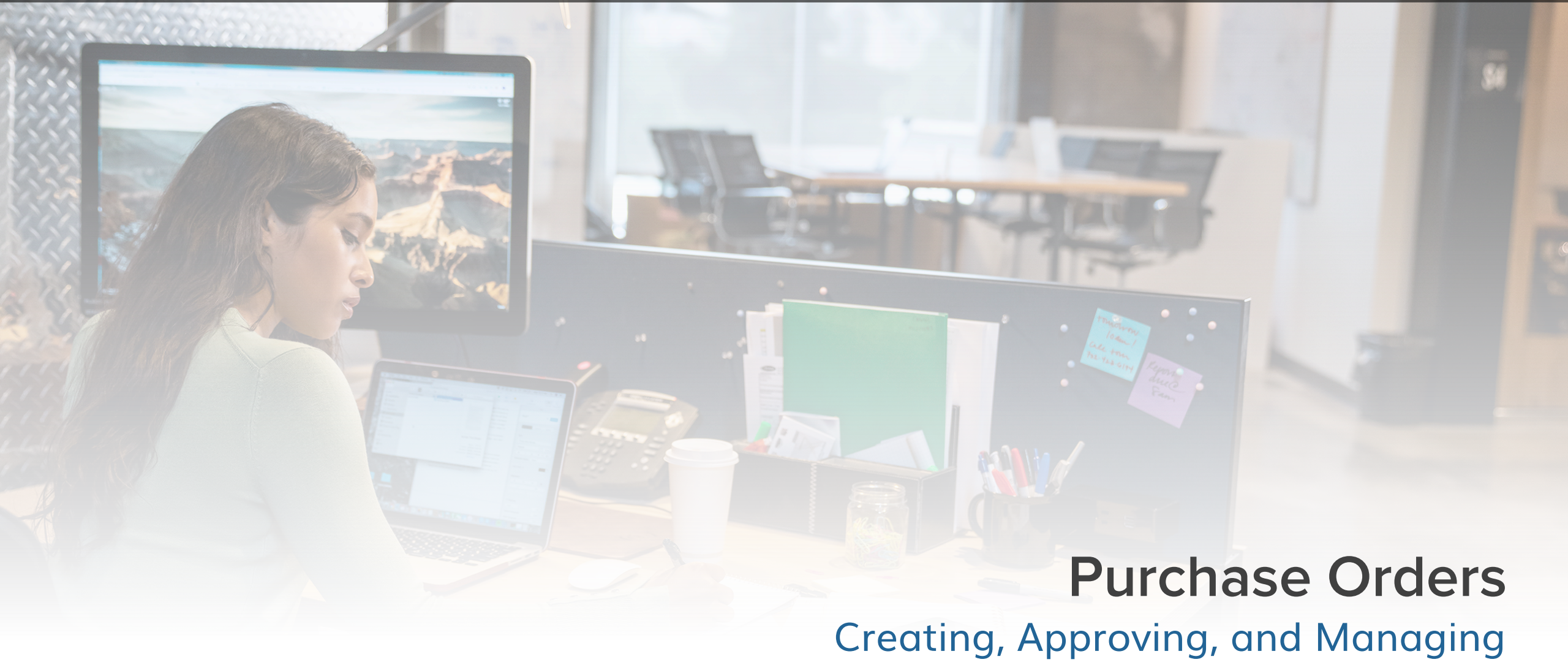
- Only newly submitted POs will pick up the modified flow

Important Notes

Consider if you need **multiple levels** for approval flow

- If you have multiple approvers that must approve every PO, do they need to approve in sequence or they just all need to approve?
 - If you want approver A to approve before approver B, build them into separate levels.
 - If you don't care in what order they approve, put them all in one level and require everyone to approve.
- This will simplify the workflow

SMART PO: Show Administrator, Department, Approval flow, and Add User Guide



Purchase Orders

Creating, Approving, and Managing

PO Settings


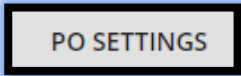

PO Show Prefix

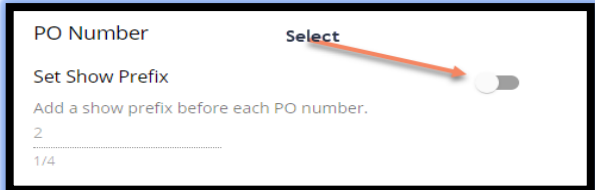
Your PO's will start at 0001.

Best practice:


If you plan to use a prefix, it's recommended that you set it up before creating POs. This way, when the POs are approved and sent to the accounting system, they'll have the prefix as part of the PO number. But you can add a prefix after you've started creating POs. The prefix will be applied to all POs.

Steps to set up Prefix:

- Management 
- PO Settings 
- PO Number 
- Select **Set Show Prefix** and enter prefix of choice. You can use up to four (4) characters alpha Numeric.



PO Number

Select 

Set Show Prefix



Add a show prefix before each PO number.

2

1/4

PO Settings

How to turn off email notifications for any user

- Go to the top right corner of SmartPO. Find your name and click on it.
- Select "Account Settings." You will see a toggle to turn notifications on or off.
- This setting will apply for any notifications coming from SmartPO.
 - Remember, creators get notifications too when a PO has been fully approved or revised.
 - Approvers get notifications when a PO has been assigned to them to approve. This will only apply to individual's profile
- **Please note:** Currency of a PO is dependent on Company selected and how it is set up in Accounting System.

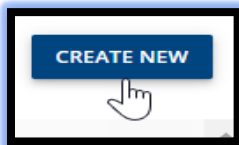
Creating a Purchase Order

How to create a Purchase Order:

- Go to Purchase Orders

A blue rectangular button with the text "PURCHASE ORDERS" in white, uppercase letters. The button has a thin black border and a slight shadow.

- Create New



Creating a Purchase Order

Fill in top fields using drop down menus.

Click **Edit** to enter Accounts from your Accounting System Chart of Accounts.

- GL accounts are not mandatory.

NOTE: Company, Currency, Vendors, and Accounts fields sync from the Accounting System. In order to sync with SmartPO, this information must first be entered in the accounting system.

The screenshot shows the 'NEW - Purchase Order' form. At the top right is 'PO# NA'. Below the title, 'Show:' is followed by a red box. The 'Date' field is '10/02/2020' and 'Currency' is 'USD'. The 'Department' and 'PO Contains' fields are dropdown menus. The 'Vendor Information' section has a 'Vendor Name' dropdown with a red box containing the text 'Type 2 Digits to get Vendor Option' and a 'Vendor Address' field. The 'Company Information' section has a 'Company Name' dropdown with a red box containing 'Production Company' and a 'Company Address' field with a red box containing 'Production Company Address'. The 'Item Details' section is a table with columns: Purchase/Rental, Rental Dates, Qty, Cost, Description, CO GLPROJ SHOW#, and Total Amount. The first row shows '1', 'PURCHASE', '1', '0.00', an empty description, 'Edit', and '0.00'. Below the table is a '+ Add Line Item' button and a summary row showing '1 Line Item(s)', '\$0.00', and 'USD'.

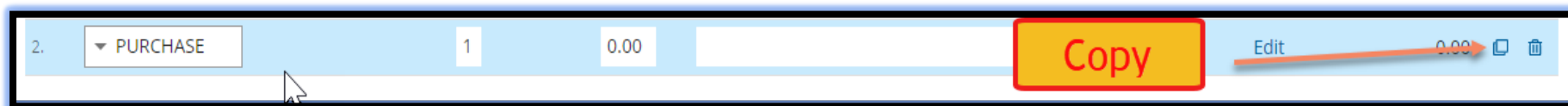
Purchase/Rental	Rental Dates	Qty	Cost	Description	CO GLPROJ SHOW#	Total Amount
1.	PURCHASE	1	0.00		Edit	0.00
+ Add Line Item						
1 Line Item(s)						\$0.00 USD

Creating a Purchase Order: Tips and Tricks

To add line of distribution:

[+ Add Line Item](#)

To copy lines:



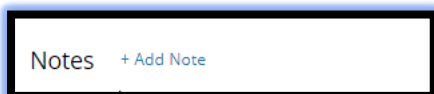
A screenshot of a purchase order line item. The line is highlighted in light blue. It contains a dropdown menu set to 'PURCHASE', a quantity of '1', and a value of '0.00'. To the right of the line is a yellow 'Copy' button. Further right is an 'Edit' link and a trash icon. An orange arrow points from the 'Copy' button to the trash icon.

To delete lines:

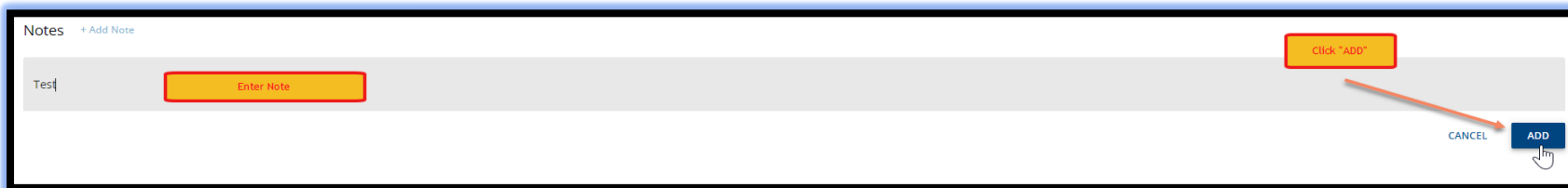


A screenshot of a purchase order line item, similar to the one above. It contains a dropdown menu set to 'PURCHASE', a quantity of '1', and a value of '0.00'. To the right of the line is a yellow 'Delete' button. Further right is an 'Edit' link and a trash icon. An orange arrow points from the 'Delete' button to the trash icon.

To Add Notes:



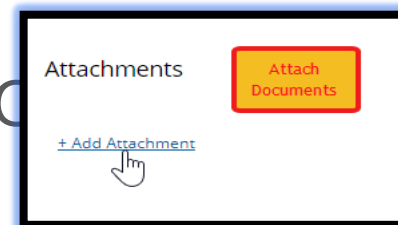
A screenshot of the 'Notes' section. It has a header 'Notes' followed by a '+ Add Note' link. Below this is a text input field with the placeholder text 'Enter Note' and an 'Enter Note' button. At the bottom right are 'CANCEL' and 'ADD' buttons. An orange arrow points from the 'Enter Note' button to the 'ADD' button.



A screenshot of the 'Notes' section, showing the text input field with 'Test' entered. The 'Enter Note' button is highlighted with a yellow box. An orange arrow points from the 'Enter Note' button to the 'ADD' button at the bottom right.

To Add Attachments:

You can drag and drop attachments onto the PO

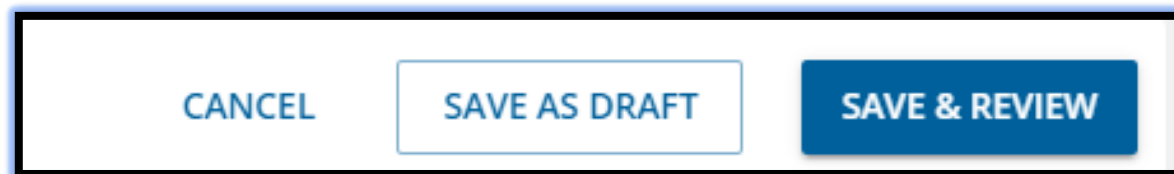


A screenshot of the 'Attachments' section. It has a header 'Attachments' followed by an 'Attach Documents' button. Below this is a '+ Add Attachment' link. A hand icon is shown clicking the '+ Add Attachment' link.

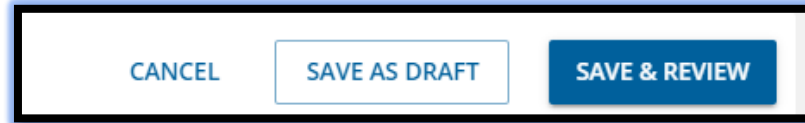
Creating a Purchase Order: Tips and Tricks

After filling out PO, select

Save as Draft
or
Save and Review:



Creating a Purchase Order: Tips and Tricks





- **Save As Draft:** You can Save PO and come back to it later to modify, before you save and send for approval. PO Number is assigned when it is saved as draft.
 - To save a PO as draft, the required fields are PO description, department, and vendor. The GL coding is NOT mandatory.

Creating a Purchase Order: Tips and Tricks



- **Save & Review:** You are saving and reviewing the PO before submitting for approval.
 - You can download PDF or send the PO via email on the review screen.
 - After submitting, the PO will then show up as awaiting approval and display the approvers under the status column.

Approvals
Pending Approval ▾ Filters: 0 Applied ▾

PO# ▾	Date	Vendor	Department	Description	Created By	Total	Status
0004	May 21, 2020	HAIR SHOP INC	HAIR	Approval Process Testing	Christine M. S	5,000.00 USD	 

Annotations:
- A red box labeled "Indication waiting on Approval" points to the Status column header.
- A red box labeled "Will Display waiting on approval names" points to the 'P' icon in the Status column of the first row.

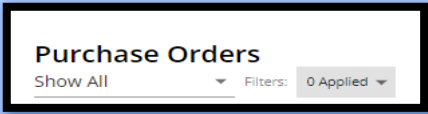
Reviewing and Managing POs

To look up PO's:

1. Select the **Purchase Order** tab.


A blue rectangular button with the text "PURCHASE ORDERS" in white, uppercase letters.

2. Select **Filter** drop-down.

A screenshot of a web interface showing a "Purchase Orders" header. Below it is a "Show All" button with a downward arrow, followed by the text "Filters: 0 Applied" with a downward arrow.

3. Chose the filtering option of choice. What PO's do you want to see?

- **Show All** – Show all PO's regardless of stage.
- **In Progress** – In Progress only shows POs that are in draft or submitted for approval.
- **Approved** – Approved only shows approved POs.
- **Denied** – Show all PO's that have been denied by Approver

A screenshot of a filter drop-down menu. It contains four options: "Show All", "In Progress", "Approved", and "Denied". The "In Progress" option is highlighted with a grey background.

Please note: If PO is denied it is effectively voided and cannot be reused. There is an option to duplicate the PO if it needs to be recreated.

Reviewing and Managing POs

You can sort columns while viewing PO's and Create Export PO Log.

- **To sort:** Click on the header you would like to sort by, and that choice will sort all PO's in view mode

PO#	Date	Vendor ▲	Department	Description	Created By	Total	Status
-----	------	----------	------------	-------------	------------	-------	--------

- **To create Export PO Log:** Click on "Create Export PO Log" tab and Excel report will populate and allow you to open a log of POs

EXPORT PO LOG

Approval of POs

Here are the approval options for approvers:

- **Approve**

Once approved, the PO will proceed to next or approver based on workflow. If final approval has been given then the PO is automatically sent to the accounting system (SA and V5). A notice will be sent to creator once fully approved.

- **Deny**

Approver must provide a note as to why they're taking this action. Once PO is denied, it is voided and can no longer be used.

- **Revise**

Approver must provide a note as to why they're taking this action. PO is sent back to the creator and PO is tagged with a revision label. The PO is back in a draft state.

Approval of POs

Your approval is requested for purchase order

PO# 0001 Craft Service

Pilot Account 6

PO Description

Craft Service

Department

ACCOUNTING

Vendor

AMERICAN EXPRESS

Total

1,250.00 USD

[View purchase order](#)

SmartPO

Patty V

PURCHASE ORDERSAPPROVALSMANAGEMENT

Show: Department: HAIRUSD

Project Info

UNIVERSAL TELEVISION LLC
*****NIVERSAL CITY PLAZA, UNIVERSAL CITY 91608
Christine M. Sanchez
May 21, 2020

Vendor Info

HAIR SHOP INC
5376 WILSHIRE BLVD
LOS ANGELES, CA, 90036

Item Details

1	Hair	\$5,000.00
Purchase Acct: 09 222207 03001 76009 01 - - - Edit		1 X \$5,000.00

Notes + Add Note

Total Cost5,000.00 USD

Submitted for approval

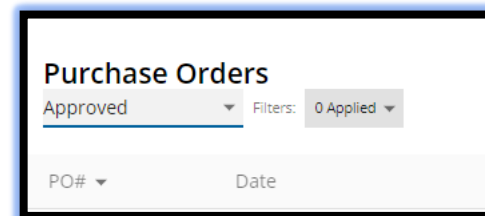
BACK TO DASHBOARDDENYREVISEAPPROVE

Approval of POs

- Approver can modify GL coding only.
- Any other change would require revision.
- Approver (s) will get an email indicating they have a PO ready for view and approve.
 - **Option 1:** Approver can click on the "View purchase order" box within email. That will take user straight to SmartPO database which will require them to sign in to view the PO.
 - **Option 2:** Approver can log in directly to the Smart PO show and select the approval tab to see the POs waiting for their approval.
 - The link to "View purchase order" in the email will expire after 7 days. If the link is expired, it is recommended the approver use option 2.

Resend PO into Accounting System

Go to **Purchase Orders** and select "Approved" from the pick list. Select approved PO by clicking on it.

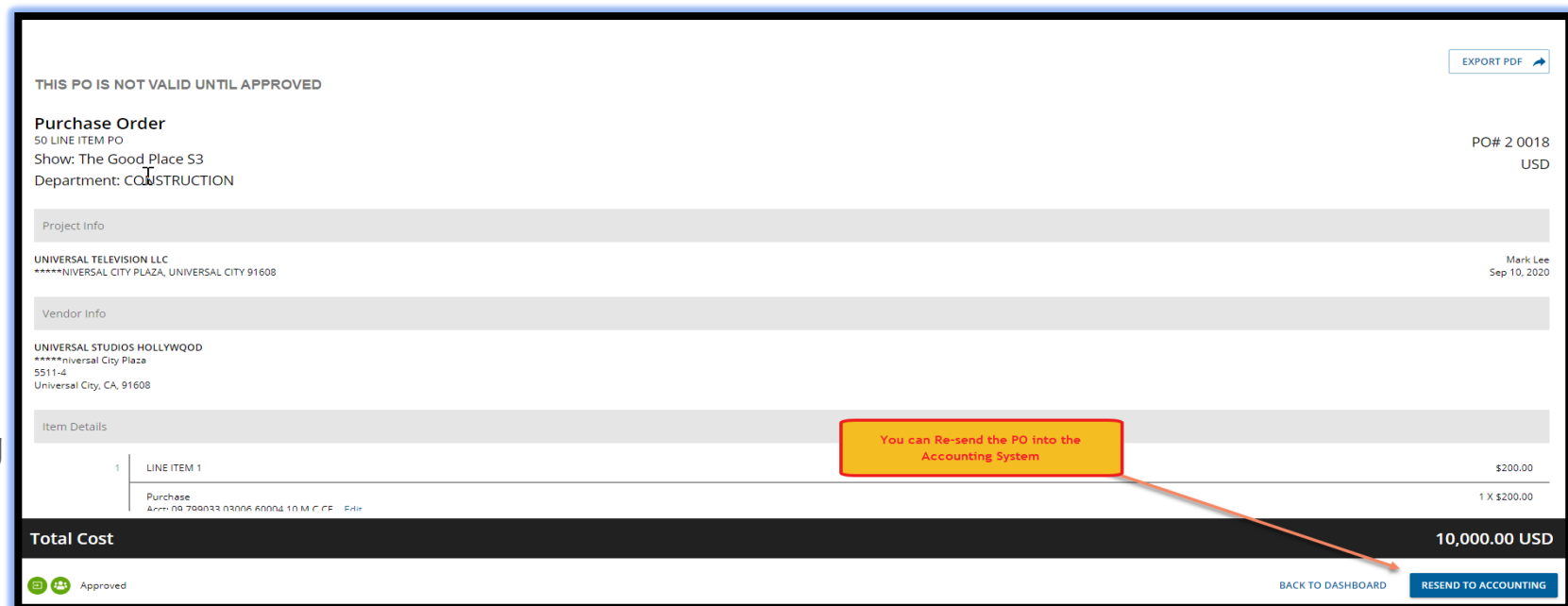


Purchase Orders
Approved Filters: 0 Applied
PO# Date

2 0018	Sep 10, 2020	UNIVERSAL STUDIOS HOLLYWOOD	CONSTRUCTION	50 LINE ITEM PO	Click	Mark L	10,000.00 USD	
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Select "Resend to Accounting" option.

The option to resend to accounting is not restricted by permissions. Be aware if triggered multiple times, it may result in duplicates of the same PO in the accounting import screen.



THIS PO IS NOT VALID UNTIL APPROVED

Purchase Order
50 LINE ITEM PO
Show: The Good Place S3
Department: CONSTRUCTION

Project Info
UNIVERSAL TELEVISION LLC
*****NIVERSAL CITY PLAZA, UNIVERSAL CITY 91608

Vendor Info
UNIVERSAL STUDIOS HOLLYWOOD
*****Universal City Plaza
5511-4
Universal City, CA, 91608

Item Details

1	LINE ITEM 1	\$200.00
	Purchase Amount: 700033 03006 60004 10 M C C E	1 X \$200.00

Total Cost 10,000.00 USD

Approved

BACK TO DASHBOARD RESEND TO ACCOUNTING

You can Re-send the PO into the Accounting System

Need assistance with
SmartPO?

We are more than
happy to help you.

Main Support Phone:
818 955-6300, Ext # 2

Email:
sposupport@ep.com