Approver - Quick Reference

Accessing OK Corral

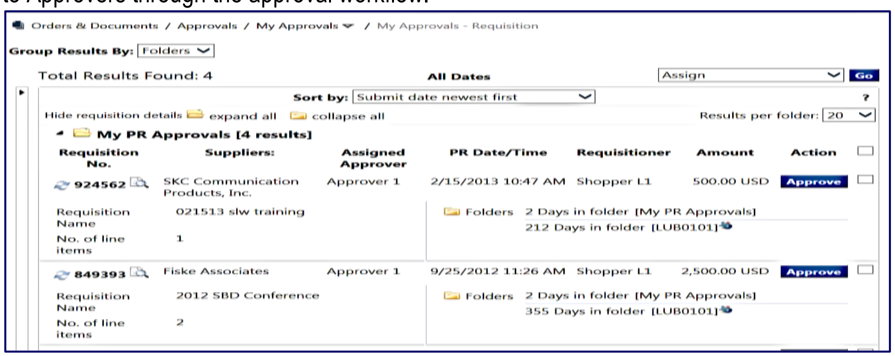
- From **OKCorral.okstate.edu**, login with your O-Key Login & Password.
- On the left side of the **OK Corral** homepage, review **Bulletin Board** information for new announcements or training materials.

Reviewing Your Profile

1. Click the drop-down to the right of your name located in the top banner. Click **View My Profile** then click **User Information and Settings**.
2. Click **User Profile and Preferences.** Review/edit **User's Name, Phone Number, Email, etc.**
3. Click the **Email Preferences**. Review/edit **Email Preferences**.
4. Click the **Language, Time Zone and Display Settings** and review/edit these settings. ▶ Reminder: **Preferred email** format is **HTML** ◀
5. User can also access, view, and made updates to **My Pending Requisitions**, **My Recently Completed Requisitions**, and **My Recently Completed Purchase Orders.**
6. Click the Home Icon or the OK Corral Logo to exit **My Profile**.

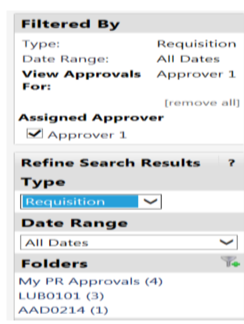
Reviewing Action Items

Action Items are items that require some sort of action from the active user such as a requisition to approve, carts assigned to me, price file to review, etc. Action items are accessed from the **Action items** menu option in the top banner**. My Assigned Approvals** can be found in the Action Items menu. Requisitions requiring review and approval are routed to Approvers through the approval workflow.



Manually Filtering the Approvals

- The approval page can be accessed through **Action Items** ⇨ **My Assigned Approvals** or **Orders & Documents** ⇨ **Approvals** ⇨**My Approvals.** The approvals page provides several filtering options to view pending documents, including filtering by **Not Assigned**, **Department**, & **Prepared By.**



1. From the **approvals** page, in the **Filter By** box, select the **remove all** link to remove all filters. Then in the **Refine Search Results Type** select **Requisition** from the drop-down menu.
2. Select other values to filter such as **Date Range, Custom Fields, or Department.**
3. Selecting a Custom Fields such as **Contract#** will filter the approvals to show only Requisitions with those values.

Assign a Requisition to Yourself

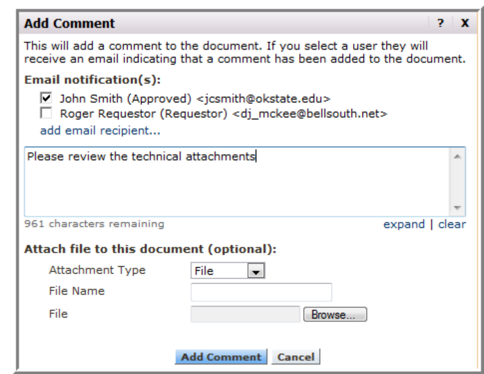
1. Click **Action Items** in the top banner ⇨ **Unassigned Requisitions Needing Approval**.
2. Locate expand all, select and open the requisition number you wish to assign.
3. In the **Available Actions** drop down menu select **Assign to Myself** ⇨ **Go** to assign the requisition to yourself.

Return a Requisition to the Shared Folders

1. Navigate to your **My Assigned Approvals** ⇨ Requisitions to Approve folder.
2. Locate the **requisition** want to return to the shared folder.
3. Click the **Select** ☑ checkbox.
4. Select **Return to Shared folder** from the Available Actions drop-down menu.
5. Click the **Go** button.

Communicate Requisition Comments

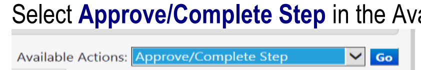
- Approvers can add a pertinent comment to a pending Requisition. Comments can be text and can include a document. Any comments made by approvers are internal only, and are not shown on the purchase order.



1. Click **Action Items** ⇨ **My Assigned Approvals.**
2. Click on the requisition number to open the transaction.
3. Select **Add Comment** ⇨ **Go** from the Available Actions menu.
4. Enter your comments. Check the ☑ **Email notification(s)** box next to the appropriate user name to add a user.
5. Click **Add Comment** button to complete.

Approve a Requisition

1. Click **Action Items** ⇨ **My Assigned Approvals** in the top banner or select the **Orders & Documents** Icon ⇨**My Approvals** to view your approvals.
2. Assign the requisition to yourself (if the requisition is not in your **My PR Approvals** folder).
3. Click the **requisition number** to open the requisition.
4. **Review** the requisition for accuracy and compliance.
5. Select **Approve/Complete Step** in the Available Actions list.



6. Click the **Go** button.

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Return a Requisition

- Returning a requisition means that you are sending the Requisition back to the department Requester for review or re-work. Your comments when returning are important.
- Click **Action Items** ⇨ **My Assigned Approvals** in the top banner or select the **Orders & Documents** Icon ⇨**My Approvals** to view your approvals.

1. Assign the requisition to yourself (if the requisition is not in your My PR Approvals folder).
2. Click the **requisition number** to open the requisition.
3. **Review** the requisition for accuracy and compliance.
4. Select **Return to Requisitioner** from the **Available Actions** list.
5. Click the **Go** button.
6. Enter a **return reason**.
7. Click the **Return to Requisitioner** button to complete.

Assign Substitute Approvers

1. Click the **Orders & Documents** ⇨ **Approvals** ⇨**Assign Substitute Approvers**.
2. Determine which folder(s) you would like to set up a substitute approver for and **Select** ☑ checkbox then follow directions below for EACH folder OR click the **Assign Substitute to All Requisition Folders** button and skip to step 4.
3. For individual folders select the **Assign Substitute to Selected Folders** in Available Actions and click **Go**. **Search** for Substitute Name and click **Assign**.
4. To end substitution click **remove** for individual folder.

Removing Substitute Approvers

1. Click the **Orders & Documents** ⇨ **Approvals** ⇨**Assign Substitute Approvers**.
2. Determine the folder(s) where you would like to remove the substitute approver and click the **Remove** button OR click the **End Substitution for all folders** button.

Adding Requisition Notes and Attachments

- **Internal Notes and Attachments** may be added to the requisition during the approval process.
- All attached documentation will remain with the requisition and purchase order indefinitely.
- Documentation is visible to all approvers of the requisition.
- Click **Action Items** ⇨ **My Assigned Approvals** on the top banner or select the **Orders & Documents** Icon ⇨**My Approvals** to view your approvals.

1. Assign the requisition to yourself.
2. Click the **requisition number** to open the requisition.
3. Click the **Requisition Summary** tab.
4. Click the **add attachment...** link. Add file or URL. Click the **Save** button.

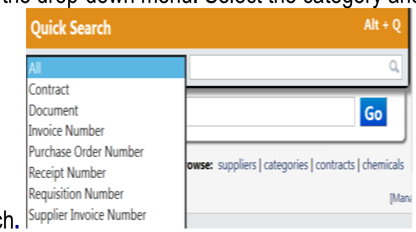
Creating and Distributing Purchase Orders

- Upon completion of the approval process, the **purchase order number** is generated and the purchase order is automatically distributed to the supplier via the supplier's preferred method.
- Suppliers are provided with the requesters contact information, as entered in the **profile**, and will contact the requester directly with questions or concerns.

Requisition and Purchase Order Search

- All requisitions and purchase orders are permanently stored within **OK Corral.**

1. Select the **Orders & Documents** Icon in the Icon tool bar at the left of the home page. Select **Search Documents,** enter your search criteria such as a requisition or purchase order number, or supplier name and select Go.
2. The **Quick Search** Icon in the top banner will also allow the user to conduct quick searches. Click the **Quick Search** and select the drop-down menu. Select the category and enter the document number then select search.



3. Click the Requisition No, PO No/ or Invoice/Receipt.to view the document summary, detail, and approval history.
4. You can also filter by **Custom Fields** appropriate for the document, such as **Campus Code** or **Contract#** or Accounting Codes such as **Account String** or **Sub Code**, etc.