

Step-by-Step Guide

Reviewing, Assigning and Approving Form Requisitions



In This Guide

- ✓ Reviewing requisitions for approval
- ✓ Assigning requisitions to yourself
- ✓ Approving form requisitions

This guide demonstrates how to assign, review and approve form requisitions.

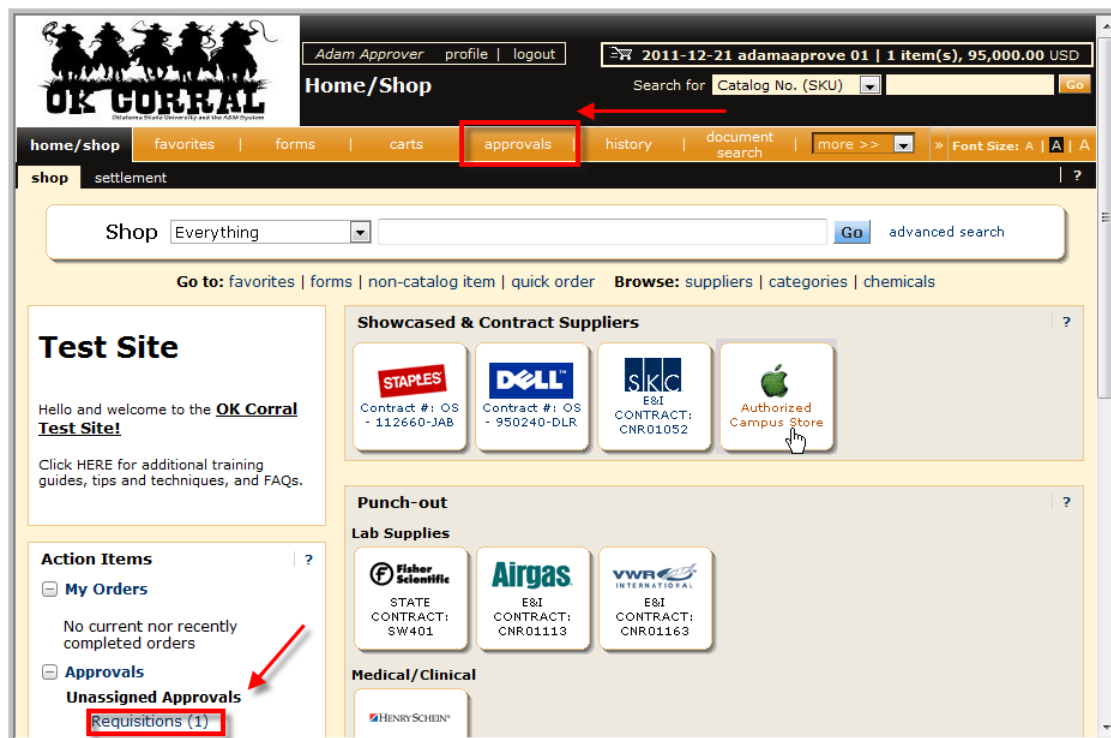
Some requisitions requiring review automatically go to your approvals folder named **My PR Approvals**. If an approval step is shared by more than one person, the document must be assigned to the approver before it is reviewed, updated, etc.

By placing the pending requisition in your **My PR Approvals** folder, it signifies that YOU are responsible for the current workflow step and indicates your intent to review (approve or return) the requisition.

- ▲ The OK Corral sends an email notification of the approved requisition to the requester (if the requester has selected this notification).

Procedure

1. From the OK Corral homepage, access your pending requisition by navigating to the **Action Items** section and clicking **+ View Approvals ⇒ Requisitions**.



Alternately you can navigate by using the top navigation toolbar, click on **approvals ⇒ requisitions**.

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- Click the **Assign** link, located in the **Action** column, to assign the requisition to yourself for review.

Training Approver profile | logout | Select Draft Cart or Add Item to Cart

Approvals - Requisitions Search for Catalog No. (SKU) Go

home/shop | favorites | forms | carts | **approvals** | history | document search | more >> | AAA

requisition | purchase order | requisition outbox | purchase order outbox | ?

Assign substitute to all folders... End substitution for all folders

+ Click to filter requisitions ?

Hide requisition details

Assign substitute to this folder... Apply Action to Selected PR(s) Approve/Complete Go

My PR Approvals ?

Results per page 10 Requisitions Found: 0 Page 0 of 0

Requisition No.	State	Priority	PR Date/Time	Requisitioner	Amount	Action
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Assign substitute to this folder... Apply Action to Selected PR(s) Assign Go

Accounting Approval ?

Results per page 10 Requisitions Found: 2 Page 1 of 1

Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action
683589		Not Assigned	Normal	12/10/2011 8:52 PM	Roger Requestor	100.00 USD	Assign

Cart Name: 2011-12-10 roger_requestor 01 Suppliers: A. Daigger & Co.

Cart Description:

No. of line items: 1

- In the **My PR Approvals** section click on the requisition number to open the requisition.

home/shop | favorites | forms | carts | **approvals** | history | document search | more >> | AAA

requisition | purchase order | requisition outbox | purchase order outbox | ?

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My PR Approvals ?

Results per page 10 Requisitions Found: 1 Page 1 of 1

Requisition No.	State	Priority	PR Date/Time	Requisitioner	Amount	Action
683589	Active	Normal	12/10/2011 8:52 PM	Roger Requestor	100.00 USD	Approve

Cart Name: 2011-12-10 roger_requestor 01 Suppliers: A. Daigger & Co.

Cart Description:

No. of line items: 1

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Creating Great Experiences and Memorable Moments

[Adam Approver](#) | [profile](#) | [logout](#)

2011-12-21 adamaapprove 01 | 1 item(s), 250.00 US

Summary - Requisition

665543

Search for

[home/shop](#) | [favorites](#) | [forms](#) | [carts](#) | **[approvals](#)** | [history](#) | [document search](#) | [more >>](#)

requisition | [purchase order](#) | [invoice](#) | [requisition outbox](#) | [purchase order outbox](#) | [invoice outbox](#)

Requisition

Summary

[PR Approvals](#) | [PO Preview](#) | [Comments](#) | [Attachments](#) | [History](#)

Available Actions: [Approve/Complete Step](#) Go

[Shipping](#) | [Billing](#) | [Accounting Codes](#) | [Supplier Info](#) | [Taxes/S&H](#)

 ?

General ?

Status  Pending
Administrative Approval 1 (Adam Approver)

Submitted 12/31/2011 5:49 PM

Cart Name 2011-11-08 donna_local 01

Description *no value*

Ship To

Attn: Donna McKee
Room
Dept AAD0320 - FINANCIAL
INFORMATION MANAGEMENT
Adair Cnty Ext Office
220 W Division St Crthse Basement
Stilwell, OK 74960

Bill To

Connors State College
Accounts Payable
918-463-6329
Rt 1 Box 1000
Warner, OK 74469
United States

5. Review the requisition line information.
6. If needed, click the line item to access the **form**.
 - ▲ Some forms may have additional data within the form that will not appear on the line. For example, the justification notes on the sole source form. Also, some forms will have the attachment within the form, not in the body of the requisition.

Supplier / Line Item Details

Hide line details

For selected line items Reject Selected Items Go

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more info...

PO Number

To Be Assigned

Quote number 2534

no value

View/edit by line item...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 Wall Display more info...	321654987		250.00	1	250.00 USD	<input type="checkbox"/>
Work Order #		no value		Internal Note		no note
Phase #		no value		Internal Attachments		
Attachments for supplier						
					Supplier subtotal	250.00
					Shipping	0.00
					Handling	0.00
					Supplier total	250.00 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal

250.00

Shipping

0.00

Handling

0.00

Total

250.00 USD

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7. To close the **form**, click the **Close** button.

8. Complete your approval by selecting **Approve/Complete Step** from the **Available Actions** list and click the **Go** button.

You have successfully assigned, reviewed and approved a form requisition.