

Step-by-Step Guide

Reviewing, Assigning and Approving Requisitions



In This Guide

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

This guide demonstrates how to assign, review and approve 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.

The screenshot shows the 'Approvals - Requisitions' page. The 'Accounting Approval' section is highlighted with a red box. Below it, a table lists requisitions. The first requisition, 683589, is highlighted with a red box. The 'Action' column for this requisition is also highlighted with a red box, showing the 'Assign' link.

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

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

The screenshot shows the 'Approvals - Requisitions' page. The 'My PR Approvals' section is highlighted with a red box. Below it, a table lists requisitions. The first requisition, 683589, is highlighted with a red box, with a red arrow pointing to it.

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

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4. Review the requisition information and make updates if applicable.
5. Complete your approval by selecting **Approve/Complete Step** from the **Available Actions** list and click the **Go** button.

General	Shipping	Billing
Status Pending Accounting Approval (Training Approver)	Ship To Attn: Roger Requestor Room Dept AAD0320 - FINANCIAL INFORMATION MANAGEMENT Adair Cnty Ext Office 220 W Division St Crthse Basement Stilwell, OK 74960 United States	Bill To Connors State College Accounts Payable 918-463-6329 Rt 1 Box 1000 Warner, OK 74469 United States
Submitted 12/10/2011 8:52 PM		Billing Options Accounting Date 12/10/2011
Cart Name 2011-12-10 roger_requestor 01		
Description no value		
Requestor Roger Requestor		
Priority Normal		

You have successfully assigned, reviewed and approved a requisition.