

Approver Quick Reference

Accessing CrimsonCorner

1. From cc.ou.edu, login with your 4x4.
2. On the left side of the **CrimsonCorner** homepage, review the **Bulletin Board** information for new announcements.

Reviewing Activity Items

- ▶ The **Action Items** section of the top panel will show current information regarding requisitions, purchase orders or invoices.
- ▶ **My Assigned Approvals:** Shows assigned **Requisitions** or **Invoices** already assigned requiring action.
- ▶ **Unassigned Approvals:** Shows unassigned **Requisitions** or **Invoices** requiring action.

Assign a Requisition to Yourself

1. Click **Unassigned Requisitions/Invoices Needing Approval** from Action Items or **Order & Documents » Approvals » My Approvals** from the main navigation menu.
2. Documents will be sorted into department number folders.
3. Click on the department number folder and locate the document you want to assign.
4. Assign the document to yourself by clicking the **Assign** link under the Action column or check the box to the right of the document under the Action column (if the document is **not** in your **My Assigned Approvals** folder) and select **Assign** from the dropdown menu.
5. The document will appear both in the department number folder and the **My Requisition/Invoice Approvals** folder.

Return a Document to the Shared Folders

1. Navigate to your **My Requisition/Invoice Approvals** folder.
2. Locate the document you want to return to the shared folder.
3. Click the checkbox to the right of the document.
4. Select **Return to Shared folder** from the dropdown menu.
5. Click the **Go** button.

Communicate Requisition Comments

- ▶ Approvers can add comments 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 on the requisition to open the document.
 2. Click the **Comments** tab and then **Add Comment** button.
 3. Enter your comments and if desired, attach any documents.
 4. Check the **Email notification(s)** box next to the appropriate user name or search to add an email recipient.
 5. Click the **Add Comment** button.

Approving a Requisition

1. From the **My Approvals** folder, assign the requisition to yourself (if the requisition is **not** in your **My Assigned Approvals** folder).
2. Click the **requisition number** to open the requisition.
3. **Review** the requisition for accuracy and compliance.
4. Select **Approve/Complete Step** in the Available Actions list.
5. Click the **Go** button.
6. If multiple requisitions are assigned to you, you can also select

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Approve/Complete & Show Next to approve the current requisition and view the next requisition assigned to you automatically.

Returning Requisitions

1. From the **My Approvals** folder, assign the requisition to yourself (if the requisition is **not** in your **My Assigned Approvals** folder).
2. Click the **requisition number** to open the requisition.
3. **Review** the requisition for accuracy and compliance.
4. Select **Return to Requester** in the Available Actions list.
5. Click the **Go** button.
6. Enter a **return reason**. Click the **Return to Requester** button.

Rejecting Requisitions

1. From the **My Approvals** folder, assign the requisition to yourself (if the requisition is **not** in your **My Assigned Approvals** folder).
2. Click the **requisition number** to open the requisition.
3. **Review** the requisition for accuracy and compliance.
4. Select **Reject Requisition** in the Available Actions list. Click the **Go** button.
5. Enter a **reject reason**. Click the **Reject Requisition** button.

Adding Requisition Notes and Attachments

- ▶ **Internal** and **External Notes and Attachments** may be added to the requisition. Attachments remain with document indefinitely and are visible to all approvers of the requisition. Some suppliers have the ability to accept external notes and attachments with a purchase order.
1. From the **My Approvals** folder, assign the requisition to yourself (if the

requisition is **not** in your **My Assigned Approvals** folder).

2. Click the **requisition number** to open the requisition.
3. Click the **add attachment...** link under the **Internal** or **External Notes and Attachments** sections. Add file or URL. Click the **Save** button.
4. All sensitive information (social security numbers, credit card numbers, protected information under HIPAA or FERPA, etc.) **MUST** be removed from documentation.

Requisition, Purchase Order, Receipts and Invoice Search

▶ All requisitions, purchase orders, invoices and receipts are permanently stored within **CrimsonCorner**.

1. Select **Orders & Documents » Document Search » Search Documents** on the main navigation menu.
2. From the Search box, select the document type you wish to search: requisitions, purchase orders, invoices or receipts.
3. You can enter the document number in the search box or leave the search box empty to search for all results.
4. You can enter a date range in the search box or leave the search box defaulted to All Dates to search for all results.
5. Click the **Go** button to search.
6. Click the document number to view document summary, details and approval history.

Approving Invoices – For Match Exception Approvers Only

1. From the **My Approvals** folder, assign the invoice to yourself (if the invoice is **not** in your **My Assigned Approvals** folder).

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2. Click the **invoice number** to open the invoice.
3. Review the invoice for accuracy and compliance
4. Select **Add Comment** from the Available Actions dropdown menu and detail why the higher amount is correct and note that the higher amount is approved.
5. Click the **Add Comment** button.
6. Select **Approve/Complete Step** in the Available Actions list.
7. Click the **Go** button.

Rejecting Invoices – For Match Exception Approvers Only

8. From the **My Approvals** folder, assign the invoice to yourself (if the invoice is **not** in your **My Assigned Approvals** folder).
9. Click the **invoice number** to open the invoice.
10. Review the invoice for accuracy and compliance
11. Select **Reject/Cancel** in the Available Actions list.
12. You will need to enter in a reason for the rejection which should reference a new invoice being submitted by the supplier.
13. Click the **Go** button.