

Requester 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** for new announcements or training materials.

Ways to Shop

- ▶ Please refer to the **Shopper Quick Reference** guide.

Reviewing Recent Activity

- ▶ By clicking on your name from the top panel of **CrimsonCorner**, you can see any recently completed orders.
- ▶ The **Action Items** section will show you any pending items that you may need to take action on.
- ▶ The **Notifications** section will alert you to any pending issues like approvals, error messages and the like.

Assigned Shopping Carts

- ▶ Requesters process assigned shopping carts from Shoppers. Shoppers specify one person to be the Requester for their cart and action must be taken before the cart can be reviewed and routed for approval as a requisition.
1. From the Navigation Bar, click **Shop » My Carts and Orders » View Draft Shopping Carts** to process an assigned cart.
 2. There are three sections: **My Returned Requisitions**, **My Drafts** and **Drafts Assigned to Me**.
 - **My Returned Requisitions** - lists requisitions that have been

returned to the Requester by one of the approvers. Take action by reviewing the comments. The shopping cart may be edited and the requisitions can be submitted again by clicking **Submit Requisition** button.

- **My Drafts** – lists carts that you are currently working on. The highlighted cart denotes the active cart.
- **Drafts Assigned to Me** – lists carts that have been assigned to the Requester by Shoppers. These require action by the Requester.

3. Click the icon to make any cart the active cart, which will allow you to edit the cart.

Add Accounting Codes, Ship To Address, etc.

- ▶ Shoppers can assign carts without completing this information however, all required information must be completed by the Requester prior to submission.
1. In the requisition, go to the sections with missing information such as Shipping or Accounting Codes. These missing sections will appear with an error at the top of the page.
 2. Enter the required information and click **Submit Requisition**.

About 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

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ability to accept external notes and attachments with a purchase order.

1. From the requisition, click the **Requisition » Summary** tab.
2. Click the **add attachment...** link under the **Internal** or **External Notes and Attachments** sections. Add file or URL. Click the **Save** button.
3. All sensitive information (social security numbers, credit card numbers, protected information under HIPAA or FERPA, etc.) **MUST** be removed from documentation.

Splitting Account Codes

1. On the **Requisition » Summary** tab, scroll down to the Accounting Codes section.
2. Click the **edit** button.
3. Click the **Add split** link. You can also do this at the item level.
4. Select **% of Price** from drop down menu button and enter the correct amounts.
5. Enter the proper accounting and amount information, then click the **Save** button.

Submit Requisition

- ▶ When the Requester has finished their edits to the cart, including all Accounting Codes, Ship To address and any additional Ad Hoc Approvals, they click **Submit Requisition**. This starts the Requisition workflow. If **Submit Requisition** button is not available, click the **Final Review** link to view any errors that are preventing submission.

Withdraw a Requisition

- ▶ Requisitions which are pending (not fully approved) can be

withdrawn from the approval workflow.

- ▶ Important Reminder: Once a requisition is withdrawn, it **cannot** be edited or resubmitted to workflow!
1. Click **Orders & Documents » Document Search » Search Documents** from the main navigation menu.
 2. Click the **My requisitions** hyperlink under the main searching toolbox.
 3. Click the **requisition number**.
 4. Click **Requisition Approvals** tab to view the requisition's status in approval workflow.
 5. Select **Withdraw Entire Requisition** in the Available Actions dropdown menu.
 6. Click the **Go** button. Enter the **reason** for withdrawal.
 7. Click the **Withdraw Entire Requisition** button.

Status of Requisition Approval

1. To check the approval status of a requisition select **Orders & Documents » Document Search » Search Documents** from the main navigation menu.
2. Click the **My requisitions** hyperlink under the main searching toolbox.
3. Click the **requisition number**.
4. Click **Requisition Approvals** tab to view the requisition's status in approval workflow.
5. Click the **view approvers** link to view the responsible approvers.

Receiving

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- ▶ Orders will require receipt to indicate invoice payment approval. An email notification is sent when receipt is necessary.
- 1. Locate the purchase order from select **Orders & Documents » Document Search » Search Documents** from the main navigation menu.
- 2. Click the **My purchase orders** hyperlink under the main searching toolbox.
- 3. Click the PO number.
- 4. Select **Create Quantity Receipt** – or – **Create Cost Receipt** and click the **Go** button.
- 5. Enter a unique **Receipt Name** or **Packing Slip No.** (if needed).
- 6. Enter the received **Quantity** – or – **Cost**.
- 7. Click the **Save** button.
- 8. Click the **Close** button.

Consolidating Shopping Carts

- ▶ When a requester consolidates shopping carts (from a shopper), the shopper loses visibility of the original shopping carts and receiving capabilities.
- 1. Click **Shop » My Carts and Orders » View Draft Shopping Carts**.
- 2. Click on the name of the shopping cart to make it your active cart.
- 3. Select the appropriate lines(s) by checking the line checkbox or **Select All**.
- 4. Select **Move to Another Cart** from the dropdown menu.
- 5. Select **Move to new cart**. Click the **Move** button then click the **Close**

button.

- 6. Repeat steps 1 through 4 and select the appropriate draft cart from the dropdown menu.

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.