

Step-by-Step Guide

Taking action on requisitions



In This Guide

This guide demonstrates how to approve or take other actions on requisitions. After the requester submits a shopping cart as a requisition, CrimsonCorner will route the requisition to the department financial approvers. Departmental financial approvers are designated in FAMS and have the responsibility to review requisitions for compliance and appropriateness.

Please note that a requisition may have multiple line items awaiting approval. In some cases, only one line item may require your approval but as an approver, you will see all the line items on a requisition. There is no direct indicator showing which line items you need to approve. It is recommended that you review all line items and focus on the line items that require your approval. You will not be able to only approve the line items that fall into your approval. If approving, you are approving the whole requisition, not just the line items applying to you. However, as an approver you do have the ability to add a comment and note which of the line items you are approving for clarification. Line items requiring the approval of others will continue to pass through workflow to obtain those approvals. A requisition will stay in workflow until all the necessary approvals are obtained.

You will receive an email notification from CrimsonCorner when a requisition is pending your approval.

This guide discusses:

- ✓ Approving requisitions, whole or by line
- ✓ Rejecting requisitions
- ✓ Returning requisitions
- ✓ Placing the requisition on hold

Procedure

1. From the CrimsonCorner home page, access pending requisitions by navigating to the **Action Items** section and selecting **Unassigned Requisitions Needing Approval** or from the main navigation bar click **Orders & Documents » Approvals » My Approvals**.
2. Assign the requisition to yourself. See **Assigning Requisitions and Invoices** for more information.
3. Click on the requisition number to view the requisition summary page.
4. Review the requisition for compliance and appropriateness and then decide which action you will take:
 - Approve the requisition, whole or by line
 - Place the requisition on hold
 - Return the requisition to the requester

Step-by-Step Guide

Taking action on requisitions



- Reject the requisition
5. To **Approve/Complete** the whole requisition:
 - Review for compliance and appropriateness.
 - From the Available Actions drop down menu in the upper right corner of the page, select **Approve/Complete Step**. Note that if you have multiple requisitions assigned to yourself, you will also see the **Approve/Complete & Show Next** option which will approve the current requisition and bring up the next requisition for you to review.
 - Click Go.
 6. To **Approve/Complete** part of the requisition:
 - Start by rejecting the lines of the requisition that you do not want to approve.
 - To reject a line, click the checkbox to the right of the line to reject.
 - From the **For selected line items** dropdown, select **Reject Selected Items** and click **Go**.
 - A pop-up window will appear to enter a reason to reject the line(s). Enter a reason and click **Reject Line Item**.
 - This reject reason will be sent in an email to the requester.
 - Once the appropriate lines have been rejected, approve the remaining line(s).
 - From the Available Actions drop down menu in the upper right corner of the page, select **Approve/Complete Step**.
 - Click Go.
 7. To **Place the requisition on hold**:
 - From the Available Actions drop down menu in the upper right corner of the page, select **Place requisition on hold**.
 - Click Go.
 - A pop-up window will appear to enter a reason to put the requisition on hold. Enter a reason and click **Place requisition on hold**.
 - The requisition will be put on hold and the hold reason will be available for review in **Comments**.
 8. To **Return the requisition to the requester**:
 - From the Available Actions drop down menu in the upper right corner of the page, select **Return to Requester**.
 - Click Go.
 - A pop-up window will appear to enter a reason to return the requisition. Enter a reason and click **Return**

Step-by-Step Guide

Taking action on requisitions



to Requester.

- This return reason will be sent in an email to the requester.

9. To **Reject the requisition:**

- From the Available Actions drop down menu in the upper right corner of the page, select **Reject Requisition.**
- Click Go.
- A pop-up window will appear to enter a reason to reject the requisition. Enter a reason and click **Reject Requisition.**
- This reject reason will be sent in an email to the requester.