

Step-by-Step Guide

Assigning requisitions or invoices



In This Guide

This guide demonstrates how to assign requisitions or invoices for action. 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. In most cases there are multiple department financial approvers assigned to a department number. Invoices are received by Financial Services for orders generated in CrimsonCorner. Invoices are visible for match exception approvers when there is a matching issue. Match exception approvers are designed in FAMS and have the responsibility of resolving any match exception issues. See **Match Exceptions** for more information on matching issues.

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

This guide discusses:

- ✓ Navigating approval folders
- ✓ Assigning requisitions or invoices to yourself
- ✓ Viewing approvers for other pending requisitions or invoices

Procedure

1. From the CrimsonCorner home page, access pending requisitions or invoices by navigating to the **Action Items** section and selecting **Unassigned Requisitions or Invoices Needing Approval** or from the main navigation bar click **Orders & Documents » Approvals » My Approvals**.
2. Requisitions and invoices pending approval are organized into folders based on department number.
3. You can toggle between requisitions and invoices by changing the Type listed on the filter on the left side of the page.
4. The first folder is the **My Requisition or Invoices Approvals** folder. If requisitions or invoices have been assigned to you for approval, they will appear here.
5. Under the **My Requisition or Invoices Approvals** folder are the shared department number folders. These are the department numbers on which you are a departmental financial approver. You will only see these folders if there are requisitions or invoices pending approval on those department numbers. If a single requisition or invoice uses multiple department numbers, the document will appear in each applicable department number folder.

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6. To assign a requisition or invoice to yourself from a department number folder, click the box to the right of the requisition and from the dropdown menu at the top of the screen, select **Assign** and click **Go**. You can assign multiple documents to yourself by clicking the main box to the right of the **Action** column to select all the documents in that particular department number folder. Alternatively, you can click the highlighted **Assign** button to quickly assign the document to yourself.
7. If you assign a requisition or invoice to yourself that is pending approval from another department number on which you are also an approver, a pop-up message will appear and give you the option to approve for all department numbers at once. Click **Yes** to do so or click **No** to only approve for one department number.
8. Once assigned, the document will now appear in your **My Requisition or Invoice Approvals** folder but it will still appear in the department number folder. This allows other departmental financial approvers to look at the requisition or invoice, but they are unable to assign a document that is assigned to someone else.
9. As a best practice, you should only assign documents to yourself when you are planning to immediately review that document.
10. If you assign a document to yourself and then decide not to review the pending document, you need to place the document back into the shared department number folder so that another department financial approver has the opportunity to review the document.
11. To move the document, click the box next to the **Action** column on the requisition line that you want to return. From the drop down menu at the top of the screen, select **Return to Shared Folder** and click **Go**.
12. The document will be returned to the shared department number folder and be unassigned for another department financial approver to assign to themselves and review.