Toolbox: Reviewing User Submitted Forms

Once a user has submitted a form for you as an ISP, each person in your area listed as a reviewer will receive an email notification to review the form and add any additional required information such as pricing.

This process is completed by whoever is the first to open their email and take action on the form.

NOTE: You must log in to Deacon Depot to review the form and add pricing. Scroll all the way to the bottom of the email and click the link in the Additional Information section. This will open the My Approvals screen in Deacon Depot.

Open the appropriate Reviewer folder and click the ‘Assign’ button to the right of the PR you wish to review. This assigns the PR to you and lets other reviewers know that you are taking action on it.
Once the PR has been assigned to you, it will display in the folder titled ‘My PR Approvals’.

To review the form and add any necessary information such as pricing, click the PR number.

The PR Information will display. Scroll down to the ‘Supplier / Line Item Details’ section and click the form title to open it.

The form information as completed by the user will display. Scroll to the section for your departmental use and enter any necessary information. Be sure to enter a product description. This description will display on the completed PO that you receive after the PR has completed the approval process. Additionally, this field feeds to Banner for reporting purposes.

NOTE: If you have a price field, do not use a $.
Once all necessary information has been entered, scroll to the top of the form, select ‘Save’ from the Available Actions drop-down, and click ‘Go’. You can print the form from this screen if you wish, using the printer icon in the top right corner.

Once you receive the ‘Success’ notification, click ‘Close’.

The PR Line Item Details will be updated with the information you entered.

You will now approve the PR to move it to the next step in the approval workflow. To approve, scroll to the top of the screen and select one of the ‘Approve / Complete Step’ options from the Available Actions drop-down. Click ‘Go’. The PR will now route to the next step of the approval process and you will be returned to the ‘My Approvals’ screen.

Once the PR routes through all steps of the approval workflow, the Purchase Order will be created and sent to you for fulfillment.