

Accessing OK Corral

- ▶ From OKCorral.okstate.edu, login with your O-Key Login & Password.
- ▶ On the left side of the **OK Corral** homepage, review the **Bulletin Board** information for new announcements or training materials.

The User Profile Menu

1. Click the drop-down to the right of your name located in the top banner. Click **View My Profile** then click **User Information and Settings**.
2. Click the **User Profile and Preferences**. Review/edit **User's Name, Phone Number, Email, etc.**
3. Click the **Email Preferences**. Review/edit **Email Preferences**.
4. Click the **Language, Time Zone and Display Settings** and review/edit these settings. ▶
Reminder: **Preferred email format is HTML** ◀
5. User can access, view, and make updates to **My Pending Requisitions, My Recently Completed Requisitions, and My Recently Completed Purchase Orders**.
6. Click the Home Icon or the OK Corral Logo to exit **My Profile**.

Reviewing Action Items

Action Items are items that require some sort of action from the active user such as a requisition to approve, carts assigned to me, price file to review, etc. Action items are accessed from the **Action items** menu option in the top banner.

Assigned Shopping Carts

- ▶ Requesters process assigned shopping carts from shoppers as well as create their own carts. 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.

Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
	2012-11-12 requester1 01	11/12/2012		12,000.00 USD	Delete
	2013-01-16 requester1 01	1/16/2013		5,008.00 USD	Delete

Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
	kaiser- 6/18/2012	6/18/2012		2,926.25 USD	Delete
	noltens staples 07162012	7/16/2012		251.80 USD	Delete

View Cart	Shopping Cart Name	Date Created	Assigned To	Total	Unassign
	2013-02-27 requester1 01	2/27/2013	Requester 13	199.65 USD	Unassign
	2013-09-03 requester1 01	9/3/2013	Requester 2	859.31 USD	Unassign
	5/20/13 Toy office supplies	3/11/2013	Requester 10	104.41 USD	Unassign

1. To process an assigned cart click **Action Items** ⇒ **Carts Assigned to Me**.
2. There are four sections, **My Returned Requisitions, My Drafts, Drafts Assigned to Me, and My Drafts Assigned to Others**.
 - **My Returned Requisitions** - lists Requisitions that have been returned to the Requester by one of the Approvers. Take action by reviewing the comments. The cart can be edited and the requisitions can be submitted again by clicking the **Submit Requisition** button.
 - **My Drafts** – lists carts that you are currently working on. The icon denotes the active cart the Requester is working on. The icon denotes an available cart. Only one cart at a time can be active.
 - **Drafts Assigned to Me** – lists carts that have been assigned to the Requester by Shoppers or other Requesters. These require action by the Requester.
 - **My Drafts Assigned to Others** – lists carts that you have assigned to others for review. You may unassign a cart by clicking the **Unassign** button and the cart will be returned to your **My Drafts** carts list.
3. Click the icon to make any cart the active cart and will allow you to make edits.

Ways to Shop

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

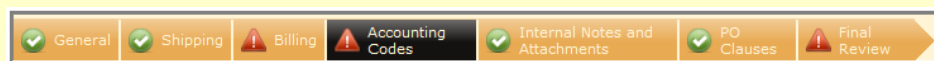
Proceed to Checkout

- ▶ Clicking **Proceed to Checkout** will present the summary details that will be part of the future Requisition. Typically this level of information will be prepared by the Requester.

Proceed to Checkout

Adding Ship To, Billing Address and Accounting Codes, etc.

- ▶ Shoppers can assign a cart without completing this information.



1. Missing information, such as Campus Code, Shipping, Accounting Codes, etc. will appear as an error at the top of the page.
2. Enter the required fields as needed and click the **Save** button.

Splitting Distributions across Account Codes

1. On the **Requisition** ⇒ **Summary** tab, scroll down to the Accounting Codes section.
2. Click the line **edit** button. Click the **Add split** link - Select **% of price** (or other) from drop down menu button. Enter the **split % price**.
3. Enter the proper information, then click the **Save** button.

About Notes and Attachments

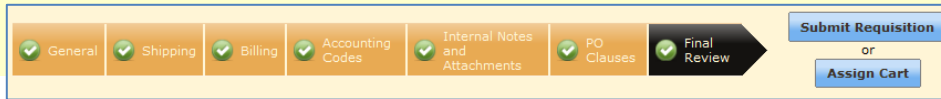
Internal Notes and Attachments may be added to the requisition. Attachments remain with the requisition / purchase order indefinitely, and are visible to all approvers of the requisition.

1. **Click Action Items** ⇒ **Carts Assigned To Me** in the top banner. Click **Shopping Cart Name** to open cart/requisition.

2. Click the **Proceed to Checkout** button, and then click the **Requisition** ⇒ **Summary** tab.
3. Scroll down to the **Internal Notes and Attachments** section.
4. Click the **add attachment...** link. Add file or URL. Click the **Save** button.

Submit Requisition

- ▶ When all edits are complete, click the **Submit Requisition** button. This starts the requisition workflow. If Submit Requisition button is not available, click the **Final Review** link.



Reviewing the Requisition Approval Status

- ▶ To check the approval status of a requisition:
 1. From the top banner, click **User Profile Menu**, and then click **My Pending Requisitions**.
 2. Click the **requisition number** ⇒ **PR Approvals** tab to view the approval status.
 3. Click the **view approvers** link to view the responsible approvers.

Withdrawing a Requisition from Workflow

- ▶ Requisitions which are pending (not fully approved) can be withdrawn from approval workflow.
- ▶ Important Reminder: Once a requisition is withdrawn, it **cannot** be edited or resubmitted to workflow!

 1. Click **User Profile Menu** on the navigation bar. Then click **My Pending Requisitions** tab.
 2. Click the **requisition number** ⇒ **PR Approvals** tab to view the requisition's status in approval workflow.
 3. Select **Withdraw Entire Requisition** in the Available Actions drop-down menu.
 4. Click the **Go** button. Enter the **reason** for withdrawal. Click the **Withdraw Entire Requisition** button.

Creating and Distributing Purchase Orders

- ▶ Upon completion of the approval process, the purchase order number is generated and the purchase order is automatically distributed to the supplier via the supplier's preferred distribution method.
- ▶ Suppliers are provided with the requesters contact information, as entered in **profile**, and will contact the requester directly with questions or concerns.

Receipting Purchase orders will require a receipt to indicate invoice payment approval. An email notification is sent when a receipt is necessary.

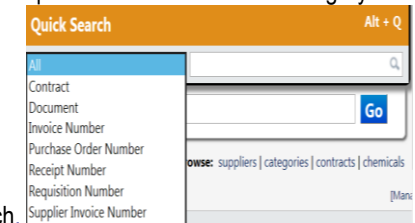
1. Locate the purchase order from **Orders & Documents** ⇒ **Search Documents**.
2. Click the **PO number**.
3. Select **Create Quantity Receipt – or – Create Cost Receipt** and click the **Go** button.
4. Enter a unique **Receipt Name** (if needed).
5. Enter the **Packing Slip No.** and attach a scan of the packing slip (if needed).

6. Click **Remove Line** for any line items where goods or services were not received
7. Enter the received **Quantity – or – Cost**. Click **Save Updates**, then click **Complete**.

Requisition and Purchase Order Search

- ▶ All requisitions and purchase orders are permanently stored within **OK Corral**.

 1. Select **Orders & Documents** in the icon tool bar at the left of the home page. Select **Search Documents**, enter your search criteria such as a requisition, purchase order number, or supplier name and select **Go**.
 2. The **Quick Search** icon in the top banner will also allow the user to conduct quick searches. Click **Quick Search** and select the drop-down menu. Select the category and



- enter the document number then select search.

 3. Click the requisition, purchase order, receipt, or invoice number to view the document summary, detail, and approval history.
 4. You can also filter by Custom Fields appropriate for the document, such as **Campus Code**, **Contract** or Accounting Codes such as **Account String** or **Sub Code**.

Deleting Carts

1. Requisitions cannot be deleted; however they can be withdrawn from workflow. Please see the *Withdrawing a Requisition from Workflow* section
2. To delete carts, click **Carts Assigned to Me** ⇒ **My Drafts**.
3. Locate the appropriate cart and click the **Delete** button.

Assigning and Ending Substitute Requesters

1. Click **Action Items** ⇒ **Carts Assigned to Me** ⇒ **My Drafts**.
2. Click on the **Assign Substitute** link and search and select the appropriate user name.
3. Choose the selected user.
4. Click the **End Substitute** link to end the substitution.

Consolidating Shopping Carts (for Hosted Catalogs, Forms or Non-Catalog Items)

When a requester consolidates shopping carts (from a shopper), the shopper loses visibility of the original shopping carts. You cannot consolidate Punch-out shopping carts.

1. Click **Action Items** ⇒ **Carts Assigned To Me** on the top banner
2. Click on the name of a shopping cart (you want to combine) to make it your active cart.
3. Select the appropriate line(s) by checking line checkbox () or **Select All** .
4. Select **Move to Another Cart** from the dropdown menu.
5. Select the appropriate cart to which the selected line items are to be moved. Click the **Move** button to complete the action...