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.

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.

Adding Ship To, Billing Address and Accounting Codes, etc.
- Shoppers can assign a cart without completing this information.

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.
5. Locate the purchase order from the Available Actions drop-down menu. Then click the Requisition from Workflow section.
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...