Shopper - Quick Reference

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 requisition approval, carts assigned to me, price file to review, etc. Action items are accessed from the Action Items menu option in the top banner. Items in the list are clickable.

Ways to Shop
- This section covers Shopping with Preferred, Punch-out, Forms, and Hosted Catalogs.

Shop Preferred Suppliers
The Preferred Supplier section includes punch-outs for suppliers which offer premier discounts or contracts.
- Please reference the following punch-out and hosted catalog instruction.

Shop with Punch-outs
- Punch-out connects to the supplier’s website, branded for the OK Corral and using our contract pricing. Punch-out sites retain the look and feel of the regular public website, however, the checkout will result in the products being returned to OK Corral and added to the active shopping cart.

Shop with Forms
- Use Forms to create shopping carts for Imprest Cash Reimbursements, Interagency Payments, invoice Attached Form, New Vendor Request, Other Payments Form, Separate Check/Payment Form, Sole Source, and Yearly/Service Order Forms.
- Select forms from the Go to bar.
- Select the appropriate form by clicking on the form name.
- Enter all required information (indicated in bold on the form) ⇒ select Add and go to Cart from the drop down menu and click the Go button to return to the shopping cart.

Shop Non-Catalog Items
- Use non-catalog item to enter goods or services not found in the OK Corral online catalogs.
- From the Go to section, select the non-catalog item link.
- Enter all required information (indicated in bold on the form).
- Click the Save and Close button to return to the shopping cart.

Shop with a Hosted Catalog
- The Hosted Catalog connects to a select set of items that are under contract and are hosted within the OK Corral.
1. Click on the supplier's icon and click the Search button to view the select set of items.
2. Click the Add to Cart button to add desired items to your Cart.
3. To access the shopping cart after adding a line item, select the 1 item(s) added, view cart link or the icon (top right corner of the OK Corral).
4. To continue shopping click the OK Corral logo or home/shop tab.

Follow the supplier's directions for submitting the items back to OK Corral as each supplier's website may differ. Product pricing and availability may vary between the public and University websites.
Always return to the supplier's punch-out session to modify your shopping cart.

1. Click the supplier's icon (for example, Staples.)
2. Search in the supplier's catalog for items and add to supplier shopping cart.
3. Complete the shopping selected on supplier's site, then return item(s) to OK Corral shopping cart.

Forms
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Updating and Editing Shopping Cart Items
1. After adding items to your shopping cart, select the appropriate line by checking line checkbox ().  
2. Add to favorites, remove items, or move items to a different cart using the Perform an action on (1 item selected)… list.  
3. If your shopping cart was created from a punch-out catalog, click the MODIFY ITEMS link to return to the punch-out session and enter your updates.

About Favorites
 Add routinely ordered items to a favorites folder for quick re-ordering. Only hosted and form items are eligible to be added as Favorites.  
1. Search for items to add to favorites in your Shopping Cart and select the appropriate line by checking the checkbox. Select Add to Favorites.  
2. Click the Perform an action on (1 item selected)… button in shopping cart.  
3. Edit Item Nickname (if needed). The correct product name will display on the requisition and purchase order to the supplier.
4. Select the Destination Folder or New button and click Submit. A message will appear noting the product has been added to the folder. Click the Close button.

Assign Cart
Once you are done shopping, assign the cart to the desired requester.  
1. Click the Assign Cart button and select the requester in the Search for an assignee link by entering the Last and First Name of the Requester.  
2. You can also enter a comment for the Requester if needed in the Note to Assignee box.  
3. Click the Assign button, and OK Corral sends an email notification of the assigned shopping cart to the requester.

Reviewing Action Items
 In the top banner of the OK Corral homepage the user can review their Action Items. Click on the Action Items drop-down text to access the list of items and click on the selected item. This will take you to the appropriate area of the application to complete the action.

Unassigning Shopping Carts
 Assigned Carts can be unassigned if you need to make changes to the shopping cart or if you need to change the Requester.  
1. Click Action Items ⇒ Carts Assigned To Me in the top banner of the OK Corral home page.  
2. Go to My Drafts Assigned to Others section and locate the cart.  
3. Click the Unassign button. The cart will be returned to your draft carts list.

Status of your Cart
 Before the shopping cart becomes a requisition, you can see the status of any carts you have assigned to another user. Select Action Items ⇒ Carts Assigned To Me. These carts will be shown in My Drafts Assigned to Others section.

Once the Requester has submitted the cart into workflow, it will no longer be shown here. Submitted carts are a Requisition, and are shown in the User Profile Menu ⇒ My Recently Completed Requisitions.

Requisition and Purchase Order History
 All requisitions and purchase orders are permanently stored within OK Corral.
1. Select the Orders & Documents Icon in the Icon tool bar at the left of the home page. Select Search Documents, enter your search criteria such as a requisition or 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 the Quick Search and select the drop-down menu. Select the category and enter the appropriate number then select search.
3. Click the Requisition No, PO No/ or Invoice/Receipt.to view the document summary, detail, and approval history.

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.  
1. Missing information, such as a 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 % amount.
3. Enter the proper information, then click the Save button.