

Step-by-Step Guide

Creating New Shopping Carts by Copying Requisitions



In This Guide

- ✓ Selecting a requisition
- ✓ Copying a requisition
- ✓ Creating a new shopping cart from an existing requisition
- ✓ Viewing recently completed requisitions

This guide demonstrates how to create a new shopping cart by copying an existing requisition.

Shopping & Policy Reminders

- Repeat Orders: Users can copy requisitions into a new shopping cart, providing a very convenient way to create repeat orders.
- Rejected Orders: If a requisition is rejected rather than returned, the copy feature can be used to copy the requisition into a different shopping cart number.
- Requisition Status: All requisition statuses can be copied.
- Punch-out Requisitions: Do not copy punch-out requisitions. Punch-out sessions require a unique shopping cart identifier that is created during the shopping process. This identifier is necessary for accurate order processing. For this reason, punch-out requisitions should not be copied into a new shopping cart.

Procedure

1. Click **document search** from the navigation bar.
2. Search for the requisition by entering the Requisition Name or Requisition Number or click the **my requisitions** link.

Step-by-Step Guide

Creating New Shopping Carts by Copying Requisitions



3. Click on the requisition number.

The screenshot shows the OK Corral search results page. The top navigation bar includes links for home/shop, favorites, forms, carts, history, document search, settlement, and more. The search bar shows 'Catalog No. (SKU)' and a 'Go' button. Below the search bar, there are links for 'start new search', 'Go to: my requisitions', 'my purchase orders', and 'my invoices'. The search results show 'Showing 1 - 7 of 7 results' for 'Last 90 days (10/4/2011 - 1/1/2012)'. The results table has columns for Requisition No., Supplier(s), Requisition Name, Requisitioner, Requisition Date/Time, and Requisition Total. The first result is highlighted with a red box: Requisition No. 690528, Supplier(s) AACC, Requisition Name Training Form Sample, Requisitioner Roger Requestor, Requisition Date/Time 1/1/2012 8:38 PM, and Requisition Total 1,500.00 USD.

4. Select **Copy to New Cart** from the **Available Actions** list.

5. Click the **Go** button.

The screenshot shows the OK Corral requisition summary page for requisition 690528. The top navigation bar is the same as the previous screenshot. The page title is 'Summary - Requisition 690528'. Below the title, there are tabs for Requisition, PR Approvals, PO Preview, Comments, Attachments, and History. The 'Summary' tab is selected. The page is divided into three main sections: General, Shipping, and Billing. The 'General' section shows the status as 'Pending', submitted on 1/1/2012 8:38 PM, and the cart name as 'Training Form Sample'. The 'Shipping' section shows the ship to address as 'Attn: Roger Requestor, Room, Dept AAD0320 - FINANCIAL INFORMATION MANAGEMENT, Adair Cnty Ext Office, 220 W Division St Crthse Basement, Stilwell, OK 74960, United States'. The 'Billing' section shows the bill to address as 'Connors State College, Accounts Payable, 918-463-6329, Rt 1 Box 1000, Warner, OK 74469, United States'. The 'Available Actions' dropdown menu is open, showing options: Add Comment, Add Comment, Add Notes to History, Withdraw Entire Requisition, and Copy to New Cart. The 'Copy to New Cart' option is highlighted with a red box. A red arrow points from the 'Copy to New Cart' option to the 'Go' button.

The items and information from the *original* shopping cart display with a new shopping cart name and date. You can change any of the information in the shopping cart, including the items, quantity, shipping or accounting information.

Step-by-Step Guide

Creating New Shopping Carts by Copying Requisitions



6. Enter a unique shopping cart **Name** (optional) and click the **update** button.

► Shop Smart!
Name your
Cart!

Shopping Cart for Sally Shopper

Name this cart:

[Continue Shopping](#)

1 Item(s) for a total of **70.00 USD**
subtotal: 70.00 USD
estimated tax, shipping & handling: 0.00 USD

[Proceed to Checkout](#) or [Assign Cart](#)

Have you made changes? [Update](#) [Help](#) [Add Non-Catalog Item](#) [Empty Cart](#) Perform an action on (0 items selected)... [Select All](#)

SKC Communication Products, Inc. more info... [Add Non-Catalog Item](#)

Product Description	Unit Price	Quantity	Total
Vaddio Thin Profile Camera Wall Mount EVI-D70 White Part Number VU 535-2000-205 Manufacturer Info 535-2000-205 - (Vaddio)	70.00 USD EA	1	70.00 USD

Item added on Dec 5, 2011
[Add to Favorites](#) [Remove](#) [larger image](#) [More Actions](#) [Update](#)

Cart Name: A default cart name, comprised of the following data is automatically assigned:
Create Date + User Name + Sequential Number.

For example: 2011-04-01 sallyshopper 03

▲ You can accept the default name but it is **recommended** to enter a unique name which can be used later to easily identify or search for your shopping cart.

You have successfully created a new shopping cart by copying a requisition.

Step-by-Step Guide

Creating New Shopping Carts by Copying Requisitions



Alternate Navigation

The procedure in this guide illustrates how to search for requisitions. You can also locate requisitions with the following navigation:

A. Go to the **carts** ⇒ **my requisitions**

Status	Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
	690528	AACC	Training Form Sample	Requestor, Roger	1/1/2012 8:38 PM	1,500.00 USD
	683589		2011-12-10 roger_requestor 01	Requestor, Roger	1/1/2012 6:28 PM	0.00 USD
	690544	A. Daigger & Co. FORD AUDIO VIDEO	2011-12-31 roger_requestor 01	Requestor, Roger	12/31/2011 4:22 PM	200.00 USD
	682366	AACC	Training Non-Catalog Item Sample	Requestor, Roger	12/21/2011 5:48 PM	100.00 USD
	669002	A. Daigger & Co.	new cart for smith lab	Requestor, Roger	12/10/2011 4:38 PM	0.00 USD
	672514	A. Daigger & Co.	2011-11-21 roger_requestor 02	Requestor, Roger	11/21/2011 3:22 PM	100.00 USD
	672511	A. Daigger & Co.	2011-11-21 roger_requestor 01	Requestor, Roger	11/21/2011 3:11 PM	100.00 USD

B. From the OK Corral homepage, go to **Action Items** ⇒ **My Orders** and click either **Requisitions Pending** or **Requisitions Recently Completed**.

Action Items

- My Orders
- Requisitions
 - Pending (2)
 - Recently Completed (3)