

# Step-by-Step Guide

## Creating Shopping Carts from Single Source Forms



### In This Guide

- ✓ Selecting a Single Source form
- ✓ Creating a shopping cart

This guide demonstrates how to create a Single Source Justification for goods or services.

### **74 O.S. § 85.45j Requisition of items where source of supply is limited to one bidder -**

Whenever any agency issues a requisition estimated to cost \$5,000.00 or more, which by the specifications indicated restricts the bidder to one (1) person or business entity, the chief administrative officer of such requisitioning unit shall prepare a certificate and recite the reasons for such restricting specifications or other facts justifying the requested purchase.

### Understanding how forms work



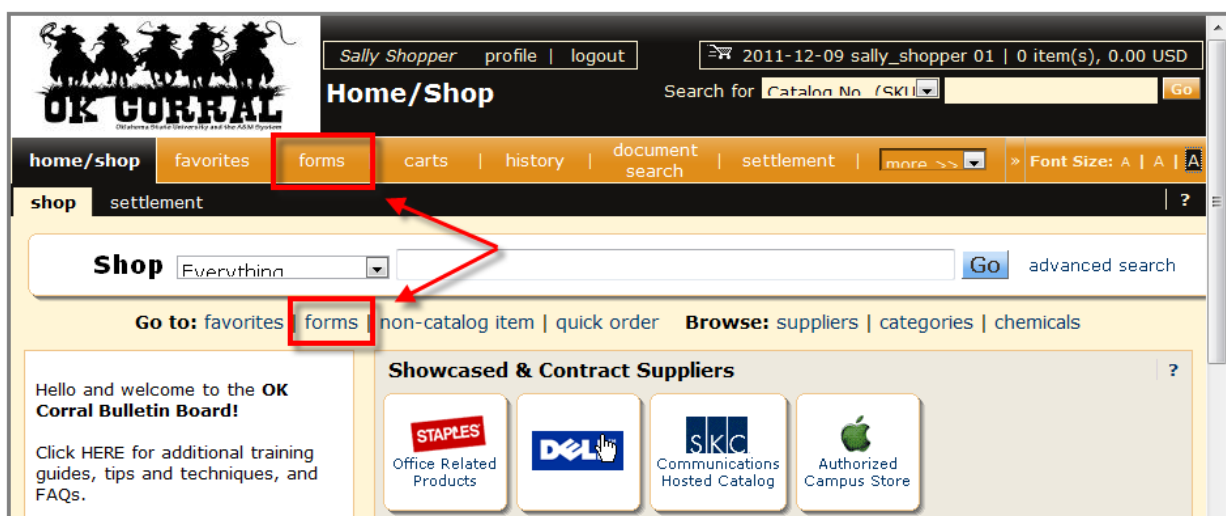
A form is presented as a “pop-up” page. Select the form, complete the required information and the item or service is returned to your shopping cart. The form will travel with your shopping cart, allowing convenient review by requesters and approvers.

There are several types of forms available in OK Corral.

Change Order Form	Invoice Attached Form	Print Request
Imprest Cash Reimbursement	New Vendor Request	Sole Source Justification Form
Interagency Payments	Other Payments	

### Procedure

1. From the OK Corral home page, select the **forms**.



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2. From the **Shared** ⇒ **Common Forms** section, click **Sole Source Justification Form**.

3. In the **Sole Source** section:
- Click the appropriate **Acquisition Type**.
  - Enter the **Supplier** or click the **supplier search** link.

- ▲ Validate that the supplier and order **Fulfillment Address** selected are accurate. An order fulfillment address is the address to which the PO will be issued.

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4. Enter the required information in the **Product Information** section.
  - A. Enter the **Product Description**.
  - B. Enter the **Catalog No.**
  - C. Enter the Quantity.
  - D. Enter the **Unit Cost** amount.

**Product Information** ?

**Product Description**

Annual license for research journals

218 characters remaining expand | clear

**Catalog No.**

0000

**Quantity**

1

**Unit Cost**

4,500.00

5. Enter the required information in the **Certification** section.
6. Enter the required information in the **Additional Details** section.

**Certification** ?

I hereby affirm that the services or products to be purchased pursuant to the provisions of the this request are very specialized or for which great acquired expertise is needed and to the best of my knowledge:

Is the only person or business entity which is singularly or peculiarly qualified to provide such services or products, and if a product is the only brand name which is singularly or peculiarly unique, for the following reason(s):

American Institute of Physics is the sole publisher and distributors of the online journals.

908 characters remaining expand | clear

**Additional Details** ?

The following is a brief description of all efforts which were made to verify that the services or products to be purchased pursuant to the provisions of this request qualify as a sole source or sole product acquisition:

After extensive internet searches and research with other Universities, we have found that this is the only supplier that can provide the required online journals.

837 characters remaining expand | clear

I understand that the authorization of this certification, knowing such information to be false, may subject me to punishment for perjury.

**Need Help??** ?

If you need assistance with this form or have questions about the policy, please contact the Purchasing Department.

Total 4,500.00

7. In the **Available Actions** section (located at the top of page), select:
  - A. **Add and go to Cart** -- if your order has only a single item
  - B. **Add to Cart and Return** -- if you need to enter a second item
8. Click the **Go** button.

Available Actions (Click [here](#) for details): Add and go to Cart Go Close

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OK Corral offers the following actions when working with forms:

- **Add and go to Cart:** Select to add the form to your current shopping cart. The active cart page will display.
- **Add to Cart and Return:** Select to add the form to your current shopping cart. The form page displays with the previously selected vendor and all other fields are reset to blank.
- **Add to Cart:** Select to add the form to your current shopping cart. The form page displays unchanged. This option eliminates redundant data entry by using the existing form data as a template.
- **Add to Draft Cart or Pending PR/PO:** Select to add the form to a draft cart or pending requisition. The system presents a popup page with a valid list of carts and requisitions. Select the cart or requisition. When complete, the form page displays unchanged.
- **Add to Favorites:** Select to add the form as a favorite. A pop-up window displays where you can select the personal folder and name of the form. When complete, the previous page displays.

9. Enter a unique shopping cart **Name** (optional) and click the **Update** button.

▶ Shop Smart!  
Name your Cart!

The screenshot shows the OK Corral 'Cart - Draft Requisition' page. At the top, the user is logged in as Donna McKee. The cart summary shows 1 item(s) for a total of 4,500.00 USD. The cart name is 'Online Journals (SS)-PTB'. The 'Update' button is highlighted with a red arrow. The item list shows 'Annual license for research journals' with a unit price of 4,500.00 USD and a quantity of 1.

**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 added a Single Source form to your shopping cart.*

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#### **Shoppers:**

See the ***Assigning Shopping Carts*** Step-by-Step Guide, where you'll learn how to:

- ✓ Assign shopping carts
- ✓ Search for requesters
- ✓ Assign default requesters

#### **Requesters:**

See the ***Proceeding to Checkout*** Step-by-Step Guide, where you'll learn how to:

- ✓ Add campus and shipping information
- ✓ Add accounting and commodity code
- ✓ Submit shopping carts as requisitions

See the ***Adding Notes & Attachments*** Step-by-Step Guide, where you'll learn how to:

- ✓ Add internal notes
- ✓ Attach documents such as continuation sheets