

Accessing OK Corral

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

Reviewing Your Profile

- 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 User Profile and Preferences. Review/edit User's Name, Phone Number, Email, etc.
- 3. Click the Email Preferences. Review/edit Email Preferences.
- Click the Language, Time Zone and Display Settings and review/edit these settings.
 <u>Reminder: Preferred email format is HTML</u>
- 5. User can also access, view, and made 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. My Assigned Approvals can be found in the Action Items menu. Requisitions requiring review and approval are routed to Approvers through the approval workflow

	Folders 🗸						_
Total Results Found: 4		All Dates			sign	~	
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Hide requisition	n details 🚞 expand all 🛛 🗔	collapse all			Results per	folder: 20	
4 🖴 My P	R Approvals [4 results]						
Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action	(
2924562	SKC Communication Products, Inc.	Approver 1	2/15/2013 10:47 AM	Shopper L1	500.00 USD	Approve	[
Requisition	021513 slw training		🖾 Folders 2 Days	. ,			
Name No. of line items	1		212 Da	ys in folder [LUB	80101] 🌤		
<i>2</i> 849393	👌 Fiske Associates	Approver 1	9/25/2012 11:26 AM	Shopper L1	2,500.00 USD	Approve	[
Requisition Name	2012 SBD Conferenc	e	Folders 2 Days 355 Da	in folder [My PR iys in folder [LUB			
No. of line items	2						

Filtered By

Date Range

Assigned Approve

Refine Search Results

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Approver 1

Date Range

My PR Approvals (4) LUB0101 (3) AAD0214 (1)

Requisition

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All Dates

View Approvals Approver 1 For:

Type:

Туре

All Dates

Folders

Manually Filtering the Approvals

- ► The approval page can be accessed through Action Items ⇒ My Assigned Approvals or Orders & Documents ⇒ Approvals ⇒ My Approvals. The approvals page provides several filtering options to view pending documents, including filtering by Not Assigned, Department, & Prepared By.
- From the approvals page, in the Filter By box, select the remove all link to remove all filters. Then in the Refine Search Results Type select Requisition from the drop-down

menu.

- 2. Select other values to filter such as Date Range, Custom Fields, or Department.
- 3. Selecting a Custom Fields such as **Contract#** will filter the approvals to show only Requisitions with those values.

Assign a Requisition to Yourself

- 1. Click Action Items in the top banner ⇒ Unassigned Requisitions Needing Approval.
- 2. Locate expand all , select and open the requisition number you wish to assign.
- 3. In the Available Actions drop down menu select Assign to Myself ⇒ Go to assign the requisition to yourself.

Return a Requisition to the Shared Folders

- 1. Navigate to your My Assigned Approvals ⇒ Requisitions to Approve folder.
- 2. Locate the requisition want to return to the shared folder.
- 3. Click the Select ☑ checkbox.
- 4. Select Return to Shared folder from the Available Actions drop-down menu.
- 5. Click the Go button.

Communicate Requisition Comments

- Approvers can add a pertinent comment to a pending Requisition. Comments can be text and can include a document. Any comments made by approvers are internal only, and are not shown on the purchase order.
- 1. Click Action Items ⇒ My Assigned Approvals.
- 2. Click on the requisition number to open the transaction.
- 3. Select Add Comment ⇒ Go from the Available Actions menu.
- Enter your comments. Check the ☑ Email notification(s) box next to the appropriate user name to add a user.
- 5. Click Add Comment button to complete.

Approve a Requisition

- This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document. Email notification(s): John Smith (Approved) <jcsmith@okstate.edu> Roger Requestor (Requestor) <dj_mckee@bellsouth.net> add email recipient... Please review the technical attachments 961 characters remaining expand I clear Attach file to this document (optional): Attachment Type • File File Name File Browse Add Comment Cancel
- 1. Click Action Items ⇒ My Assigned Approvals in the top banner or select the Orders & Documents Icon ⇒ My Approvals to view your approvals.
- 2. Assign the requisition to yourself (if the requisition is <u>not</u> in your **My PR Approvals** folder).
- 3. Click the **requisition number** to open the requisition.
- 4. Review the requisition for accuracy and compliance.
- 5. Select Approve/Complete Step in the Available Actions list.

Available Actions: Approve/Complete Step Go

6. Click the Go button.



Return a Requisition

- Returning a requisition means that you are sending the Requisition back to the department Requester for review or re-work. Your comments when returning are important.
- Click Action Items ⇒ My Assigned Approvals in the top banner or select the Orders & Documents Icon ⇒ My Approvals to view your approvals.
- 1. Assign the requisition to yourself (if the requisition is <u>not</u> in your My PR Approvals folder).
- 2. Click the **requisition number** to open the requisition.
- 3. Review the requisition for accuracy and compliance.
- 4. Select Return to Requisitioner from the Available Actions list.
- 5. Click the **Go** button.
- 6. Enter a return reason.
- 7. Click the Return to Requisitioner button to complete.

Assign Substitute Approvers

- 1. Click the Orders & Documents ⇒ Approvals ⇒ Assign Substitute Approvers.
- 2. Determine which folder(s) you would like to set up a substitute approver for and Select ☑ checkbox then follow directions below for EACH folder OR click the Assign Substitute to All Requisition Folders button and skip to step 4.
- 3. For individual folders select the **Assign Substitute to Selected Folders** in Available Actions and click **Go. Search** for Substitute Name and click **Assign**.
- 4. To end substitution click remove for individual folder.

		Showing 1 - 5 of 5 results Results		te to Selected Fol	ders 🗸	Ge
Filtered By	4	Results per Sort by: Folde	r name ascending	✓ Pa	ge 1 of 1 📧	?
Type: Requisition		Folder Name	Approver	Substitute	Action	
Refine Search Results ?		AAD0214	Approver 1	Approver P9	Remove	
Туре		CSC2811	Approver 1		Assign	
Requisition 🖌		LUB0101	Approver L1	Approver 1	Assign	
Approver		My PR Approvals	Approver 1		Assign	
Approver 1 (3) Approver L1 (1) Approver C10 (1)		My PR Approvals (Approver C10)	Approver C10	Approver 1		
Substitute						
Approver 1 (2) Approver P9 (1)						

Removing Substitute Approvers

- 1. Click the Orders & Documents ⇒ Approvals ⇒ Assign Substitute Approvers.
- 2. Determine the folder(s) where you would like to remove the substitute approver and click the **Remove** button OR click the **End Substitution for all folders** button.

Adding Requisition Notes and Attachments

- Internal Notes and Attachments may be added to the requisition during the approval process.
- > All attached documentation will remain with the requisition and purchase order indefinitely.
- Documentation is visible to all approvers of the requisition.
- Click Action Items ⇒ My Assigned Approvals on the top banner or select the Orders & Documents Icon ⇒ My Approvals to view your approvals.
- 1. Assign the requisition to yourself.

- 2. Click the requisition number to open the requisition.
- 3. Click the Requisition Summary tab.
- 4. Click the add attachment... link. Add file or URL. Click the Save 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 method.
- ► Suppliers are provided with the requesters contact information, as entered in the **profile**, and will contact the requester directly with questions or concerns.

Requisition and Purchase Order Search

- All requisitions and purchase orders are permanently stored within OK Corral.
- 1. Select the **Orders & Documents** lcon in the lcon 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

Quick Search	Alt + Q
All Contract	٩
Document Invoice Number	Go
Purchase Order Number Receipt Number	owse: suppliers categories contracts chemicals
Requisition Number Supplier Invoice Number	[Man

- 3. Click the Requisition No, PO No/ or Invoice/Receipt.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 or Contract# or Accounting Codes such as Account String or Sub Code, etc.