Shopper - Quick Reference

Accessing OK Corral
▶ From **OKCorral.okstate.edu**, login with your O-*Key Login & P*assword.
▶ 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 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 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. 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.

▶ 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
▶ 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.
1. Select **forms** from the **Go to** bar.

2. Select the appropriate form by clicking on the form name.
3. **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.
1. From the **Go to** section, select the non-catalog item link.

2. Enter all required information (indicated in bold on the form).
3. 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.

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 items 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.

Assign Cart

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.

My Drafts					legend ?
Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
🛒	5/20/13 Toy office supplies	3/11/2013		104.41 USD	Delete

Drafts Assigned To Me					legend ?
Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
🛒	kaiser- 6/18/2012	6/18/2012		2,926.25 USD	Delete

My Drafts Assigned to Others					legend ?
View Cart	Shopping Cart Name	Date Created	Assigned To	Total	Unassign
🖨	🛒 2013-02-27 requester1 01	2/27/2013	Requester 13	199.65 USD	Unassign
🖨	🛒 wessel-office supplies-7/16/12	7/16/2012	Requester 5	251.80 USD	Unassign

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

Quick Search — Alt + Q
All
Contract
Document
Invoice Number
Purchase Order Number
Receipt Number
Requisition Number
Supplier Invoice Number
browse: suppliers | categories | contracts | chemicals
Go

appropriate number then select search.
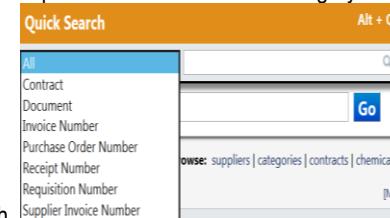
3. Click the Requisition No, PO No/ or Invoice/Receipt.to view the document summary, detail, and approval history.

Proceed to Checkout

Proceed to Checkout
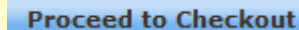
▶ Clicking **Proceed to Checkout** will present the summary details that will be part of the future Requisition. Typically this level of information will be prepared by the Requester.

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.