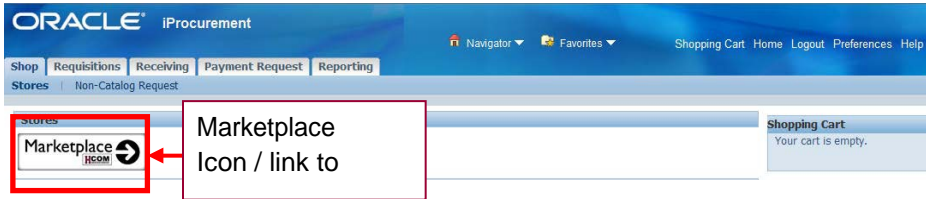


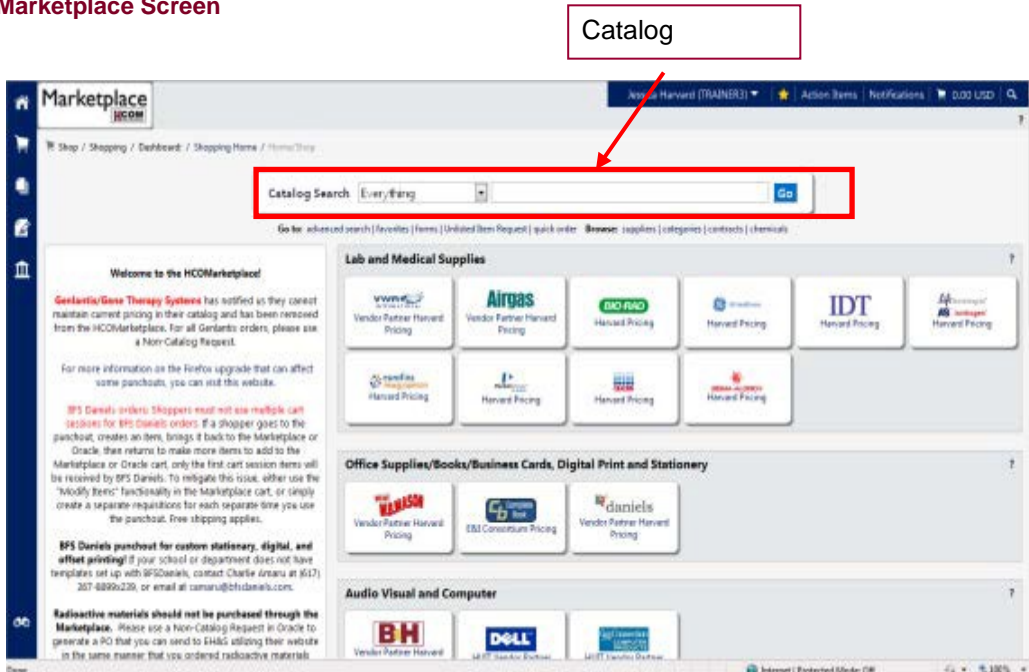
Catalog Request Quick Reference

Catalogue Request Overview

HCOM Home Page



Marketplace Screen



- **Log into HCOM** at:
<http://vpf-web.harvard.edu/applications>
 1. Click **Personal Homepage**.
 2. Click **Oracle Login via FSS**.
 3. Login with HUID & PIN.
 4. Click **HRVD^IPROUREMENT**.
- **Marketplace:** Shoppers will use the **Marketplace** to create **Catalog Requests**. **Marketplace Vendors** provide an electronic listing of goods and services available through the Marketplace.
- **Catalog Request:** A type of requisition line item selected from a searchable list of commodities with predefined pricing found in the Marketplace. Catalogs are stored internally within the Marketplace.
- **Catalog Requests** are automatically transmitted electronically to the vendor after approval and invoices are received centrally.
- **Catalog Requests** have robust search and browse capabilities. They allow you to search or browse by Supplier or Category, compare goods or services between multiple vendors, and conduct a chemical structure search.
- **Catalog Requests** are most commonly used for lab supplies and associated items.
- **For Time Out Recovery information, see page 2.**
- **Logout of HCOM** after working on Requisitions, click **Logout** link.

Help Contacts:

- For technical issues, contact the HU IT Help Desk:
ithelp@harvard.edu or x6-2001
- For customer service issues, contact University Financial Services-AP Customer Service:
ap_customerservice@harvard.edu or x5-8500, option 1.

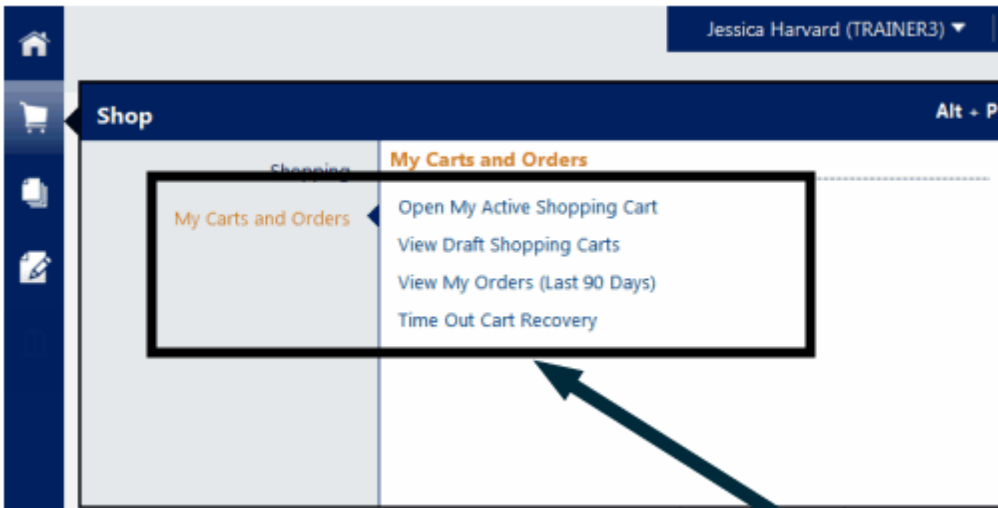
Important Note: If a familiar vendor is not part of the Marketplace either by Punchout or Catalog, create a Non-Catalog Request for the purchase. If the vendor is one with which you repeatedly conduct business and would like to be added to the Marketplace, contact **Harvard's Office of Strategic Procurement** team via email at procurement@harvard.edu.

Refer to [Creating a Non-Catalog Request](#) on Eureka (<http://eureka.harvard.edu>) for step-by-step instruction for this type of request.

TIME OUT RECOVERY

TIME OUT RECOVERY: If you are shopping in the Marketplace for longer than 30 minutes, you may find you are timed out of HCOM when you try to submit your Shopping Cart. To retrieve your Shopping Cart, use these steps:

- a. Log back into HCOM
- b. Select the Marketplace button
- c. Select the Shopping Cart icon, then My Carts and Orders, then Time Out Cart Recovery



- d. Select Resubmit Cart

Time-Out Cart Recovery. NOTE: Only use this page after encountering a time-out Oracle error.

Status	Requisition No.	Requisition Name	Requisition Date/Time	Requisition Total	
✓	43967816	2013-10-07 01802743 01	10/13/2013 3:01 PM	65.55 USD	resubmit cart
✓	42981640	2013-09-05 01802743 01	9/5/2013 10:11 AM	795.41 USD	resubmit cart
✓	42037095	2013-08-04 01802743 01	8/4/2013 8:15 AM	100.00 USD	resubmit cart

- e. Complete the **Checkout** process.

Step 1 – Find Goods: Catalog Search and Browse Capabilities



The Simple Search functionality enables you to drill down to all or one product category. You can also enter one or more key words in the text box next to the Go button.

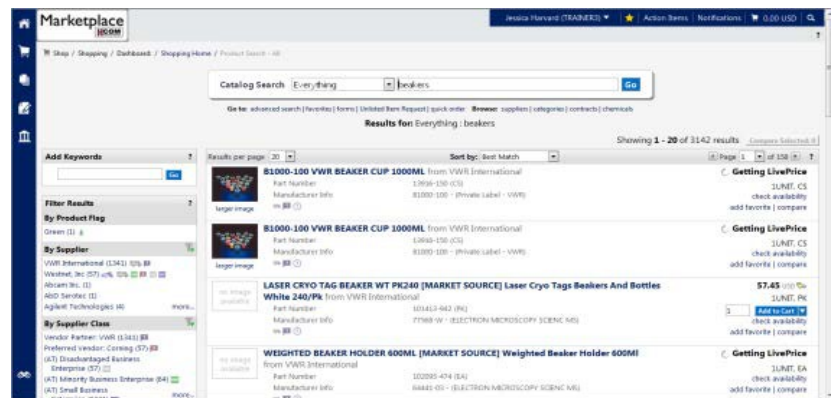
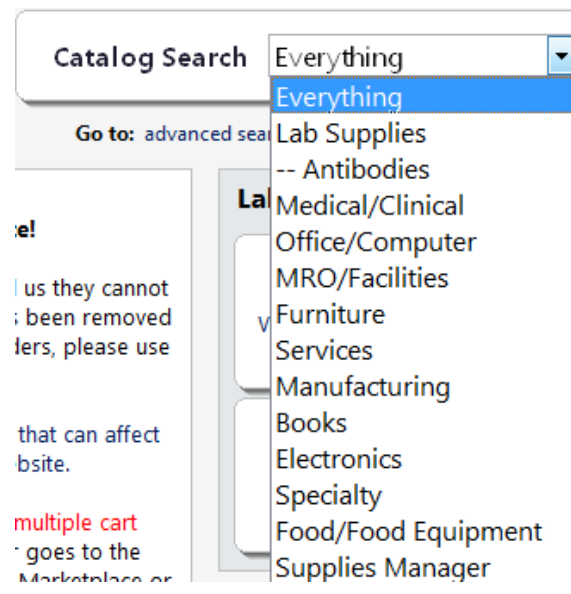
1. From the iProcurement Home Page, click on .
2. By default the **Catalog Search** box / Product Category defaults to “**Everything**”. Using the dropdown arrow, change the **Product Category** if necessary.

3. Enter one or more key words in the text box next to the **GO** button.

Note: An “*” can be used in the text box as a wildcard character.

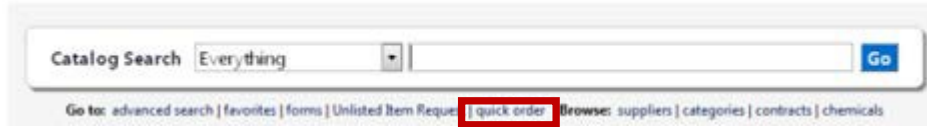


4. The results of your search will be reflected in the Product Search – All page.



Step 1 – Find Goods: Catalog Search and Browse Capabilities, cont.

Quick Order



The Quick Order functionality enables users to automatically add an item to a cart by entering a product catalog number in the Quick Order field.

Quick Order back to shop...

Category:

Part Number (SKU):

Part Number (SKU):

Part Number (SKU):

Part Number (SKU):

Part Number (SKU):

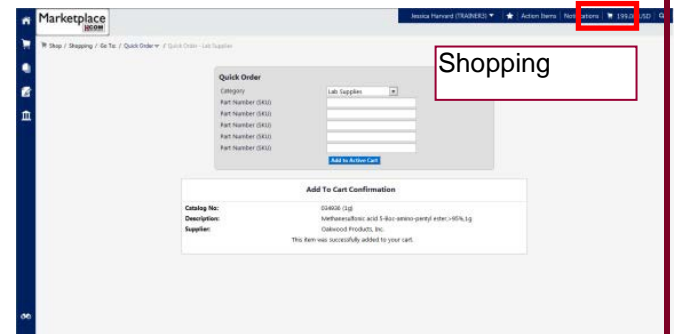
[Add to Active Cart](#)

1. Select the [quick order](#) link from the Catalog toolbar to access the **Quick Order** panel.
2. Select the **Product Category** from the dropdown menu if necessary.
3. Add up to five Product Catalog Numbers (SKUs) to the **Product Catalog Numbers (SKU)** fields.

Note: If there is no exact match or multiple matches found, you are instructed to refine your search or select from the results populated on the newly displayed screen.

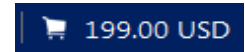
4. Click the [Add to Active Cart](#) button at the bottom of the panel.

5.

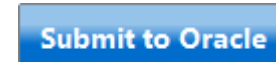


Note: If an exact match is found in either the supplier or manufacturer **Part Number (SKU)** field with a Marketplace hosted Catalog, the item is automatically added to the requisition.

6. Click on the **Shopping Cart** at the top right of the screen and select **Checkout**.



7. Then and proceed with the Checkout process.



Step 1 – Find Goods: Catalog Search and Browse Capabilities, cont.

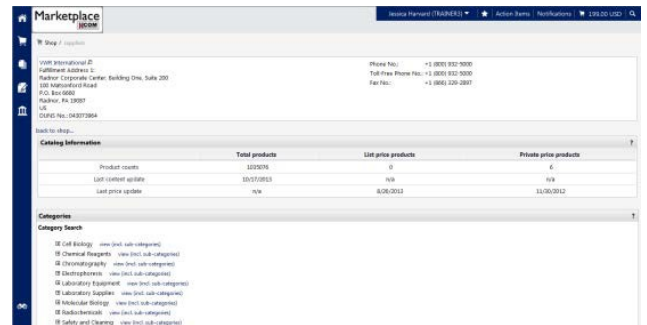
Browse Suppliers



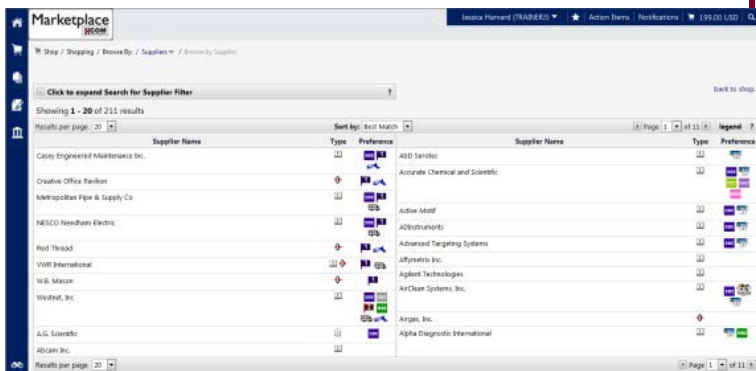
Browse by Suppliers allows users to see what **Suppliers** are available, how items and services can be ordered from the **Suppliers** and what items / item categories are available from the **Suppliers**.

1. Click on the **Browse: suppliers** link from the Catalog toolbar to access the **Browse by Supplier** selection.

2. From the listing of Suppliers, locate and click on the appropriate **Supplier** link.
3. All products listed from the Supplier internal Marketplace catalog will display.



4. Expand the decision tree within the **Category Search** panel until you locate your items,
5. Click the **View** **Cell Biology view (incl. sub-categories)** link beside your item to display all the products within this sub-category.
6. Select the item you wish to purchase by clicking on the **Add to Cart** button.
7. Complete the **Checkout** process.



See [HCOM Legendus Quick Reference](http://eureka.harvard.edu) on <http://eureka.harvard.edu> for more information on the legends listed on this screen.

Step 1 – Find Goods: Catalog Search and Browse Capabilities, cont.

Browse Categories

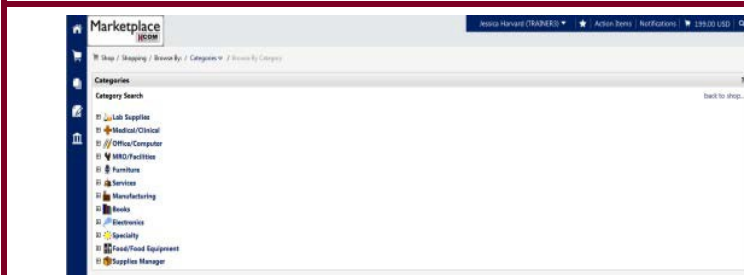


Browse by Categories provides users access to all hosted catalog data by category and sub-category. This functionality is equivalent to opening numerous paper catalogs from many Suppliers to the same section.

1. Click on the categories link from the Catalog toolbar to access the **Browse by Catalog** section.
2. Select a **Product Category** and drill down to the various sub-categories to view products from all Suppliers.

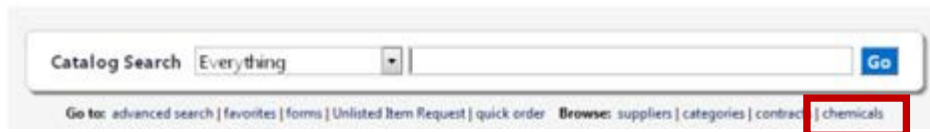
3. Expand the decision tree until you locate the appropriate sub-category.
4. Click the **View** link beside your Tools and General Machinery view (incl. sub-categories) item to display all the products within this sub-category.
5. Select the item you wish to purchase by clicking on the Add to Cart button.

Complete the **Checkout** process.



Step 1 – Find Goods: Catalog Search and Browse Capabilities, cont.

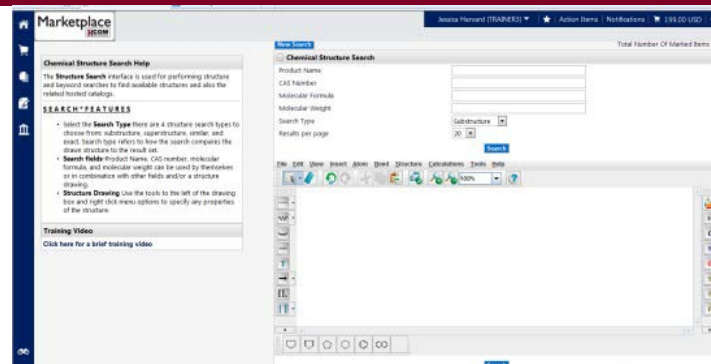
Browse Chemicals



Browse by Chemicals provides users a **Chemical Structure Search** that enables searching for chemicals using an exact match, superstructure, substructure, and similarity search based on what the users draws in the search box. Users can also perform a structure search (of any type) in combination with a Product Name, CAS #, Molecular Formula, or Molecular Weight. Users can also choose to search only on fields and not include a structure.

1. Click on the [chemicals](#) link from the **Catalog** toolbar to access the **Chemical Structure Search** screen.
2. Use the tool bar on the left-hand side of the page to create your chemical structure. You can also use the various other search fields such as CAS Number, Molecular Formula, etc.
3. Click the [Search](#) button.
4. Select the **Chemical Structure** you are interested in by clicking on the [Mark](#) checkbox.
5. Click on the box next to the [Search Catalog](#) button followed by the [Go](#) button.
6. The search results are displayed.
7. Select the chemical structure you wish to add by clicking the [Add to Cart](#) button.
8. Complete the **Checkout** process.

Note: Once you've clicked on the **Browse: Chemicals** link, you will have the option of viewing a brief training video on using this functionality.



Step 1 – Find Goods: Catalog Search and Browse Capabilities, cont.

Advanced Search



Advanced Search enables users to enter additional criteria to generate a more specific search result than with a Simple Search. Advanced Searches can be performed for a single category or across all categories. The criteria available within an Advanced Search varies based on the category (s) selected.

- From the Marketplace, click on the [advanced search](#) link to access the Advanced Search panel.

- Utilize the [Everything](#) drop down menu to identify a specific **Product Category**.
- Select the appropriate fields from this panel to narrow your product selections.
- Click on the [Search](#) button to activate any or all of the Advanced Search criteria entered.

Advanced Search Fields include:

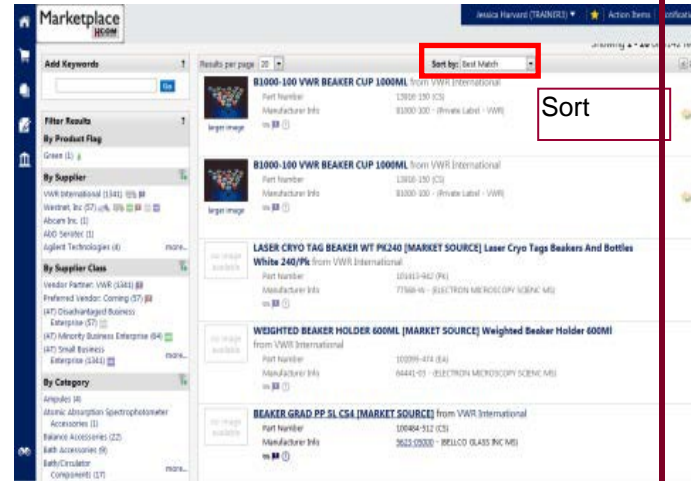
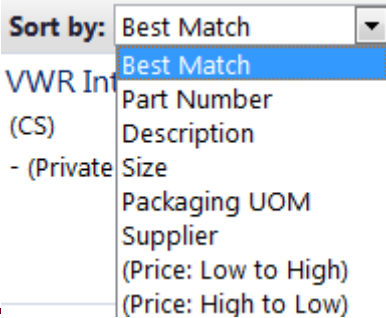
- All of these Words:** Only products including the words entered in this field are returned in the search results.
- Part Number (SKU):** Enter a single part number or (SKU) for the required products.
- Supplier:** Enter the Suppliers name into this field to limit your results.
- Manufacturers Name:** To find products by a specific manufacturer. Search results will include all products from all suppliers who have identified the manufacturer in the product information.
- Exact Phrase:** Products returned will contain (in the item description) all of the words entered into the **Exact Phrase** search field.
- Any of these Words:** Search results will include products containing any of the words entered in this field. Products containing more than one word appear higher in search results than products with only one.
- Exclude Words:** Products including any of the words entered in this field are not part of the search results. Another search field must be used when using the exclude function.
- Hide advanced Search on Search Results:** Select this option to hide the Advanced Search input box when search results are displayed. You may select the Advanced Search hyperlink to reopen the Advanced Search input fields.

Step 2 – Filtering and Comparing Search Results

Filtering – Sort by:


Once the search results appear in the Product Search – All page, you may determine that it is necessary to narrow your search further.

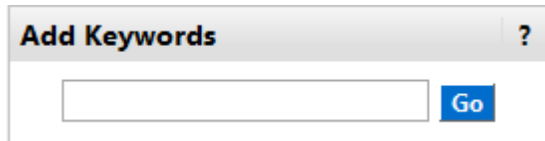
Utilize the **Sort by:** field to sort less than 200 items from the Product Search – All page if applicable.



Filtering – Filter Results:

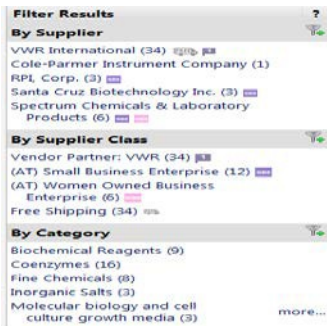
Once the search results appear in the Product Search – All page, you may determine that it is necessary to narrow your search further.

- Enter a key word into the **Add Keywords** field. Then select  to filter by that word.




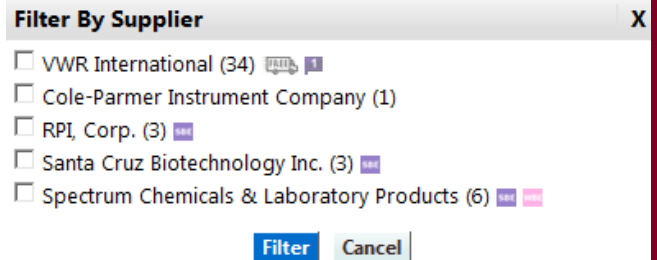
The **Filter Results** pane, offers some additional search functionality. It is possible to focus your search on a particular **Supplier**, **By Supplier Class**, **By Category**, **By Packaging UOM**, **By result Type**, and **By Manufacturer Name**.

Many types of icons are associated with Catalog vendors. These icons provide information for you to make the best selection. For example, there are icons that designate whether the vendor is a minority-owned or a woman-owned business. The icons also list those vendors that offer free shipping for goods or sell recycled goods



The vendor listed first with the  icon next to it is a preferred vendor. This is based on the volume of business the vendor does with the University.

Click on the plus sign next to the  icon to view the options associated with your search. In this case, you are filtering **By Supplier**.



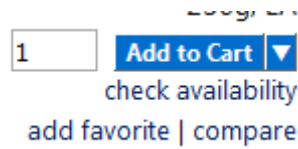
1. Select your supplier from the **Filter By Supplier** box and then click on the **Filter** button.
2. Then select another **Filter Results By** opportunity if needed. The filter options can be used individually or in conjunction with another filter.

Comparing Catalog Items

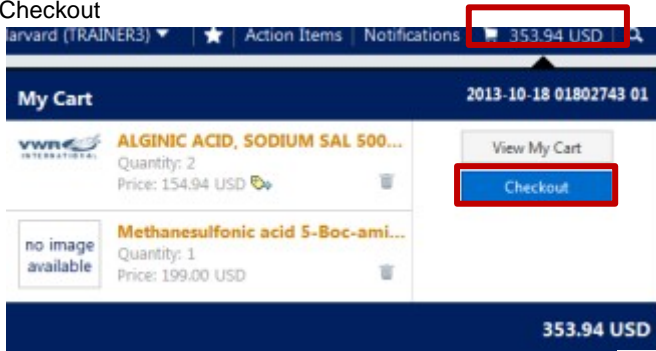
The Marketplace offers the ability to compare two different vendor items side-by-side.

To create a comparison between two or more vendor items:

1. At the Marketplace – conduct a **Simple Search, Advanced Search, Quick Order** or **Browse** to locate your item (s).
Note: An "" can be used in the text box as a wildcard character.*
2. Click the **Go** button.
3. Once the search results are displayed, use the **Filter Results** and/or **Sort By** functionality to narrow the results of your search further if necessary.



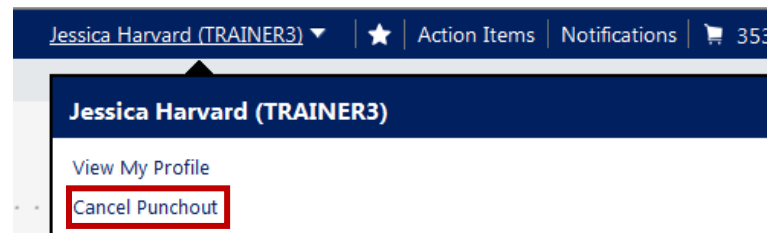
4. Click the **compare** links for each item you want to evaluate side-by-side.
5. The word **compare** for all items selected for comparison now read **remove**.
6. Click on the **Compare Selected: 2** button located at the top right-hand corner of the page.
7. Choose the item you prefer, enter quantity then click on the **Add to Cart** button.
8. Finally, click on the cart link, on the upper right-hand corner of the screen to add the items to your **Shopping Cart** and click **Checkout**



9. Submit your Catalog Request to HCOM by clicking on the **Submit to Oracle** button.

Step 3: Creating a Catalog Request

Note: You can return to Oracle, without making a purchase, at anytime by selecting your Username and the Cancel Punchout link






Creating a Catalog Order Request:

1. Login to HCOM and access the HCOM Home page.
2. Click on the **Marketplace** icon link.
3. Complete the **Search, Browse** and/ or **Filter** functionalities, and finalize your purchase selection
4. Enter the quantity of the purchase in the box next to the **Add to Cart** field.

Note: The drop down arrow next to the Add to Cart button allows you to add your purchase to the Draft Cart or Pending PR/PO status.

Note: You can add items from multiple Vendors to your current

Requisition by selecting the  icon at the top-left of the page to return to the Marketplace screen. From there, you can access the websites of additional Punchout Vendors or Shop from the Catalog Vendors.

5. Continue shopping by searching for and / or just adding additional items to your cart.
6. Finish shopping and click  to view the contents of your **Shopping Cart**.
7. From the Marketplace, it is necessary to submit the contents of your cart back to HCOM for purchase. Click the  button to submit the Marketplace cart back to HCOM.
8. Once back in HCOM, you must **initiate the checkout process**. This creates the formal Requisition and subsequently begins the approval process.

Step 4: Checking Out a Marketplace Order

1. Shopping Cart Screen



1. Add an **Asset Tag Number**: If applicable to your school.
2. Add **Line Level Notes**: Add additional business purpose information to the Line Level Notes section. This information is helpful to Approvers. This information does not appear on the CREW Detail Listing Report.

You can delete lines from the Shopping Cart by clicking on the

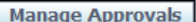
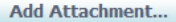

 *next to the line.*

3. Click .


2. Check Out: Requisition Information Screen

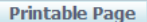
1. **Requisition Description**: Enter the business purpose for the overall purchase. **Note:** The contents of this field are searchable if you need to find this text at a later date.
2. **Attention** field: Enter the name of the person receiving the delivery.
3. **Attention Room/Floor** field: Enter a building or room number. Adding this information is a one-time activity. After entering, set the **Attention** lines as defaults. Check the box. The content in the **Attention** fields will automatically appear when you place another order.
4. If necessary, modify the default **Deliver To Location**.
5. If necessary, modify the **account(s)** to which items in the order will be billed by clicking the hyperlinked 33 digit account code. Click the account code again to change the account code. Press  on each review screen to arrive back at the main screen.
6. Click the  button.

3. Check Out: Approvers Screen

1. If necessary, modify the approver(s) by clicking . Select one of the following actions to modify approver(s):
 - Add approver
 - Change First Approver
 - Delete Approver
 - Reset Approval List
2. Enter an optional **Note to Approver** or **Note to Supplier**.
3. Attach any necessary documents to the request by clicking . (Optional)
4. If this is a grant purchase, and an item is over 4,999.99, complete the **Vendor Justification** section. If the purchase is over \$24,999.99 verify that the **Debarment Form** is on file. (You can download it by clicking on the link.) Refer to the **Completing the Vendor Justification Form Quick Reference** for more information.
5. Click .

4. Check Out: Review and Submit Screen

Review and click the  button.

Optional: If you wish to print the Requisition prior to submittal, click the Show Link, then .

Note: It is possible to add additional line items to a requisition throughout the **Checkout Process** prior to submitting the requisition. Click the **Shop** tab to access the Marketplace and locate your additional item. The items will be consolidated into one requisition once you return to Oracle.

After the Marketplace Requisition is Created

- Forward to an Approver

- If you are an approver who is shopping and the order is less than \$2,499.99, approve the order
- Once final approval is given, a Purchase Order is generated
 - If email preferences are set, the shopper will receive an email with a Purchase Order number attached to it.
 - The Purchase Order will begin with the number 4
 - Purchase Order will contain a bill-to address to UFS Accounts Payable.
- The Purchase Order will be electronically transmitted to the Vendor
- The Vendor will fulfill the order and deliver the goods to the address identified during the checkout process
- The Vendor will send the invoice, in some cases electronically, to UFS Accounts Payable
- You will receive goods in HCOM. **Receiving** is the process of electronically acknowledging the receipt of goods.
- UFS Accounts Payable will pay the invoice

Step 5: Receiving

- Receiving is required for:
 - All purchases >\$2,499.99
- If you are a Shopper/Approver with Self-approval privileges, Self-approval is not allowed for purchases over \$2,499.99 or sponsored purchases regardless of the amount
- Receiving functionality is still available for purchase orders under \$2,500, but does not affect two-way-match or payment. This can be used for reporting purposes if required by the department.

Receiving a Marketplace Order

Rules of Thumb

- If all the goods you ordered are delivered, receive all the goods.
- If only a portion of the goods are delivered, receive only what was delivered.
- If all the goods are delivered and you need to return one or more items, receive all the items and process the returns.

Refer to the **Holds, Receiving, and Returns Quick Reference** for more information on receiving goods.

Receiving the Order:

1. Click the **Receiving** tab.
2. Click the hyperlinked number of the **Requisition** to receive.
3. Click the **Receive** button.
4. Click the **Select** checkbox beside each line item to receive.
5. In the Receipt Quantity column, indicate the quantity that was invoiced.
6. Click the **Next** button.
7. If desired, enter **Receipt Comments**.
8. Click the **Next** button.
9. Review the information entered. If everything is correct, click **Submit**.