

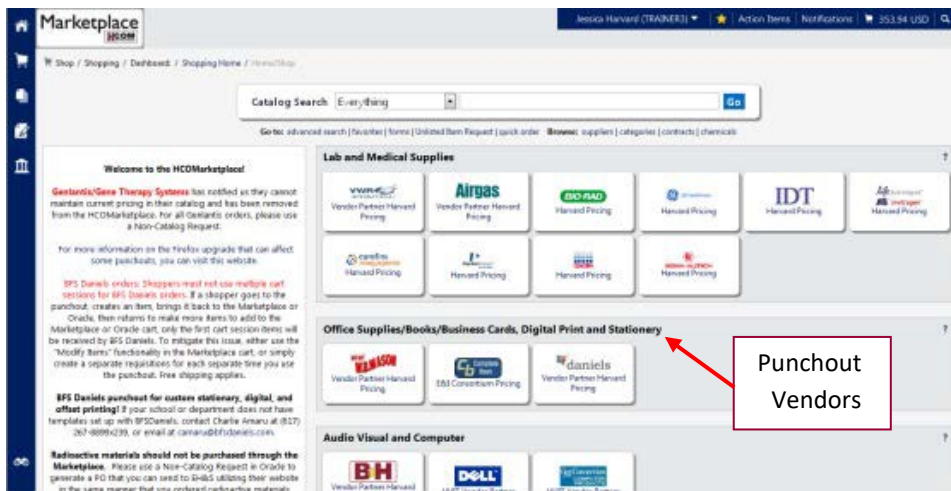
Punchout Request Quick Reference

Overview

HCOM Home Page



Marketplace Screen

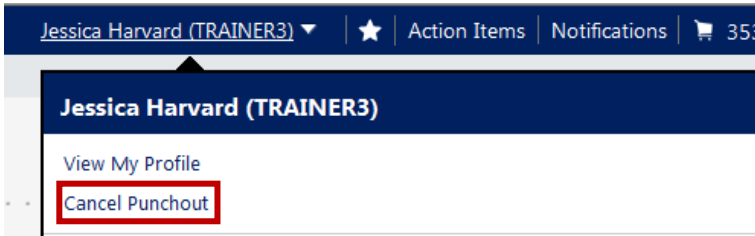



- **Log into HCOM** at:
<http://vpf-web.harvard.edu/application>
 1. Click [Personal Homepage](#)
 2. Click [Oracle Login via F28](#)
 3. Login with HUID & PIN
 4. Click [HRVD~IPROUREMENT](#)
- **Marketplace:** Shoppers will use the **Marketplace** to create **Punchout Requests**. **Marketplace Vendors** provide an electronic listing of goods and services available through the Marketplace.
- **Punchout Request** is a type of requisition line item selected from a vendor website customized for Harvard University. These vendor sites contain predefined pricing and are accessed through the Marketplace.
- **Punchout Requests** are automatically transmitted electronically to the vendor after the approval and invoices are received centrally.
- **Logout of HCOM** after working on Requisitions, click **Logout** link.
- **For Timeout Recovery, see page 3.**
- **Help Contacts:**
 - For technical issues, contact the HU IT Help Desk: dls@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 see added to the Marketplace, contact Harvard's Office of Strategic Procurement team via email at procurement@harvard.edu.


Creating a Punchout Order Request


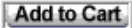


Note: You can return to Oracle, without making a purchase, at anytime by selecting your Username and the Cancel Punchout link



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.

Creating a Punchout Order Request:

1. Login to HCOM and access the HCOM Home page.
2. Click on the  icon link.
3. Select the appropriate **Punchout Vendor Icon** from within the Punchout Window.
4. Click on the **Punchout Vendor's Icon** to leave the Marketplace and enter the Punchout Vendor's website.
5. Using the website's navigation, select your purchase items and their quantities.

Note: each Vendor website has its own terminology and navigation.
6. Click the appropriate **Add To** button, such as  or .
7. Finish shopping and review the contents of your shopping cart.
8. Follow the websites navigation until you are ready to click on the  button to submit the cart back to the Marketplace.
9. 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.
10. To continue shopping with another vendor, click Continue Shopping on top left.
11. Once back in HCOM, you must **initiate the checkout process**. This creates the formal Requisition and subsequently begins the approval process.

Note: Refer to the **Checkout Process Quick Reference** for more information.

Things to Remember

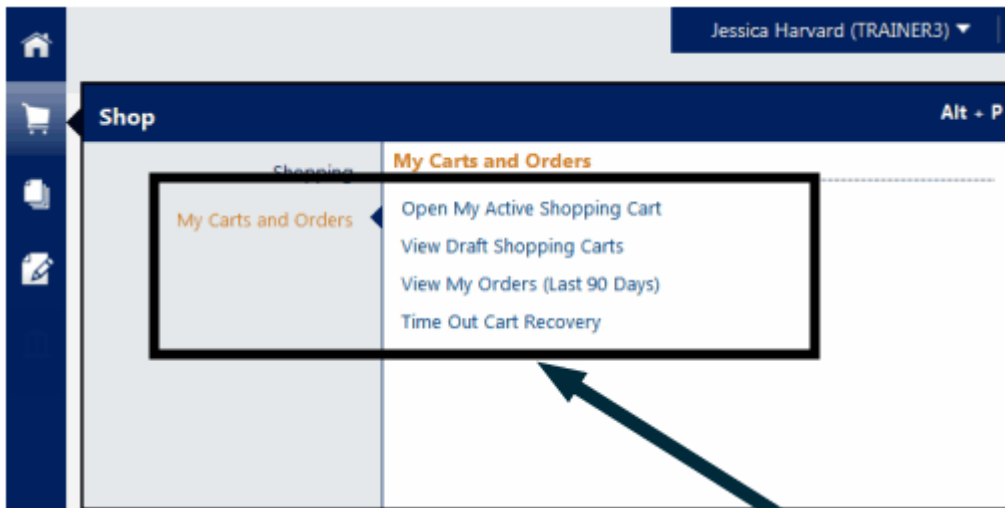
- All mandatory fields are designated with an *.
- The **Vendor Justification Form (VJF)** section needs to be completed for purchase requisitions over \$4,999.99 where Federal sponsored funds are used.
- Debarment section needs to be completed for purchase requisitions over \$24,999.99 where Federal sponsored funds are used.

HCOM will allow you to mix and match Catalog items, Punchout items and Non-Catalog items in a single cart. However, it is highly recommended that you create separate requisition for Non-Catalog items.

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


A red box highlights the 'resubmit cart' link in the first row, and a red arrow points to it from the bottom right.


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

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.


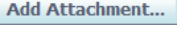

You can delete lines from the Shopping Cart by clicking on the  next to the line.

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. Click  on each review screen to arrive back at the main screen.
6. Click .

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  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 Punchout Request 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

Receiving Requirements

- 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 it does not affect two-way match or payment.

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 a Marketplace 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 the **Submit** button.