

Collin County Community College District



Approver's Guide

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Introduction to CougarMart

CougarMart is a web-based requisitioning application that will allow Collin County Community College District to buy goods and services more economically and efficiently. Ellucian Banner will continue to be the financial system of record.

Roles in CougarMart

Requestor - Individual that will shop and place orders. Requires access granted in Banner.

Shopper – Individual that can create a cart and assign to a Requestor. This individual cannot submit an order because they will not have Banner access.

Approver – An Organization Manager, Account Review, Vice President/Provost, Technology, Grant approver, Associate Vice President/Chief Financial Officer, or Executive Vice President. This individual will review the requisition to ensure the purchase is valid and appropriate before approving.

Buyer - Buyers from the Purchasing department will review and do the final approval for requisitions based on commodity and/or dollar level.

CougarMart offers a place to search for items that are on contract and create a cart/requisition for approval and purchase.

Contact Information for CougarMart

CougarMartSupport@collin.edu, extension 3873

For questions concerning **CougarMart** software usage, such as training and procedures, contact Herbert Harper, Purchasing Coordinator, <u>hharper@collin.edu</u>, 972-758-3873

For questions concerning setting up new suppliers, contact Jill Stine, Purchasing Assistant, jstine@collin.edu, 972-758-3874

Questions concerning **CougarMart** rejected/pending PRs (requisitions), contact Karen Bell, Assistant Director of Purchasing, <u>KBell@collin.edu</u>, 972-758-3876

Questions concerning new users, and new and existing forms, contact Cyndy Smith, Purchasing IS/Reporting Manager, <u>clsmith@collin.edu</u>, 972-758-3872

Accessing CougarMart

The **CougarMart** application can be accessed from the My Workplace tab of CougarWeb. It will be in the eProcurement channel right below the Innovation Challenge Submissions channel.



Production **CougarMart** can be accessed thru the hyperlink in the eProcurement channel of My Workplace tab of CougarWeb. We utilize single sign-on, so you do not need a User Name nor a Password. If you are logged into CougarWeb and receive the **CougarMart** login screen, just left mouse click on the large blue Login button.



You also have access to the training database thru the **CougarMart** Training hyperlink. You may use Windows Internet Explorer 11, or Edge with the latest version of Windows 10, or the latest versions of Chrome or Firefox.

The Home (landing page) will be similar to the one below depending on the roles you are granted. You can click on the right pointing carot at the bottom left to see definitions of the menus.



Help

You can access Help for the page you are on by left mouse clicking the question mark in the upper right hand corner of the page. Additional Help is available by left mouse clicking on the question mark in the area you are in.

Navigation

CougarMart is driven by a series of menus (Shop, Orders, Contracts, Accounts Payable, Suppliers, Reporting,) that slide out from the left side of the screen. The house icon at the top left corner of the page will return you to the Home (landing) page.

The Home page allows requestors to search for goods and services from contracts and **Showcased Suppliers**.

The Orders menu allows you to Search Documents, view Procurement Requests for a specific period, search Receipts, View Saved Searches, and Download Exported Files.

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The Contracts menu allows you to search for contracts, View Saved Searches, Search Contract Parties, and View Import/Export Results.

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Your Profile is available from your username drop down. The Logout is not required due to single sign on.

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Action Items can be accessed from the top of the landing page by left mouse clicking on the flag.

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📜 Shop	The Shop > Shopping > Shopping Home ▼ > Home/Shop				Action Items
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The message board on the left hand side of the page displays **Welcome to CougarMart!** followed by hyperlinks to the **CougarMart** Approver and Requisitoner Guides, **CougarMart** Vendor Request

Forms, America To Go Punch-out Instructions, Administrative Resources (Collin College website, Purchasing and CougarWeb, Purchasing), and the Technical Requirements to run the application.

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	Rem carbs food under the Rems link on the Rudrating intranet page.	New Vendor Add Request Form	Vendor Update Request Form				

Approving Requisitions

When Requestors submit their cart for approval, it will go thru **Banner Budget Authorization** before being placed on the approval path. Once budget has been approved, the application will send an e-mail to the first approver notifying them that they have a document awaiting their approval. The approver can click on the link provided within the e-mail and will be directed to the approvals screen within **CougarMart.** If you are not logged into **CougarMart** and you want to approve documents:

1. Left mouse click on the **COUGARWEB LOGIN** button from the Collin College Home page.



2. Enter your Username and Password then either left mouse click on the LOGIN button or hit the Enter key.



3. Left mouse click on the My Workplace tab.



4. Go to the eProcurement channel and left mouse click on the **CougarMart** link.

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🔮 What's New	Innovation Challenge Submissions	🕐 Crísis Response
Employee Dashboard Ensityee Pasthe Bradfa Dra.bai Dra.bai Dra.bai Dra.bai TracEust Pas TracEust Pas	Collin College's Innovation Challenge is an opportunity to dream, create, innovate, and share your ideas. You can help Collin College be the best organization and the best place for students in our service area to learn and grow.	Energency/Safety Procedures Energency Safety Procedures Energency Seasons Pain Councestant Teamerson, Solation Councestant Teamerson, Solation Solatest Incodent Research Maddator, Resonant Paint Maddator, Resonant Paint Maddator, Seasonant Maddator, Sea
Organizational Effectiveness	No matter the stage of development, or where you are with budgets or timeline, your dream can be shared <u>here!</u>	n Canvas
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5. Go to the **Orders** menu and choose Approvals then Requisitions to Approve.

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6. The default view will be **Group Results By:** Folders with the folder(s) collapsed. To expand the folder and view all requisitions, left mouse click on the expand all, or left mouse click on the right pointing triangle beside the folder that you want to work with.

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7. Once you have expanded the folder or folders, you have the option to Hide requisition details.

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Δ	-	This PR has notes	✓					

8. You can select the header-level checkbox to apply the Assign action to all documents the left mouse click on the **Go** button to assign them to yourself; or you can assign individual documents by left mouse clicking on the box to the right of the document. You can also left mouse click the checkbox to the right of several document, choose the Assign action at the top right then left mouse click on the **Go** button to assign them.

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9. There can be both Not Assigned and Assigned requisitions in approval folders. All requisitions must have a state of Assigned before they can be approved. You can determine the State of a requisition by looking at the Assigned Approver column. If a requisition is Assigned it will contain the Assigned Approver's name. On the left side of the page, there are criteria under Filter My Approvals. The criteria are Type, Date Range, View Approvals For, Supplier, Supplier Class, Department, Current Workflow Step, Prepared For, Prepared By, Status Flags, Custom Fields, Form Type, Folders, Priority, Assigned Approver, and State. You can use the State filter of Not Assigned to see the requisitions that need to be assigned then remove the filter to see all

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		<i>2</i> 128842619 🕰	Rexel USA	Not Assigned	2/3/2020 11:19 AM	John Brewer	1,228.15 USD	Assign
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requisitions that need to be approved.

- NOTE: You will not get the Return to Shared Folder, Place on Hold, Return to Requisitioner, Forward To..., and Reject Requisition actions from within a document until you have assigned the document to yourself.
- 10. To review a document before approving, you can either left mouse click on the document number to open the document, or left mouse click on the Quick View icon beside the document number.
- 11. After you have reviewed the document, you can choose an action from the Available Actions drop down menu above the document if you have linked from the document number, or

Orders & Docum	ents 〉 Approvals 〉 My Ap	provals 🗢	Summary - Requisition 49492418					
• Return to App	rovals		🔳 1 of 1 results 膨			Requisition Num	ber(s) 494924	418 •
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Cart Name	2014-04-16 CTJOHNSON (FOREMOST PROMOTIONAL)		McKinney, TX 75071 United States				View/edit by lir	ne iter
Accounting Date	no value		Delivery Options	edit				
Description			Requested 4/30/2014					

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Prepared by Department	Charlene Johnson Nursing (Nursing)	Date				<u>gn</u>
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C	3	380210	755745			-

If you are using the Quick View your only options will be to Approve.

12. When you chose the Return to Requisitioner action and left mouse click on the **Go** button, the requisition will be returned to the person that entered it to make the required changes.

NOTE: The Return to Requisitioner action is ONLY available from within the document.

13. If you choose the Reject Requisition action and left mouse click on the Go button, the requisition will be permanently rejected and not useable. It can be found thru the Orders menu, Search, Search Documents by selecting Rejected under Workflow Status or a Status Flag of With Rejected Lines and could be copied if need be.

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		Workflow Status	
		Completed Pending	
		Status Flags	
		With Rejected Lines With Withdrawn Lines	
		With Errors With Attachments	
		With Trade-In Items With Receipt Based Invoice With Credit Card	
		Go to: simple search my requisitions my purchase orders my invoices	
0 00		Q Search	
->		Powered by JAGGAER Privacy Polic	y 🗸

Breadcrumbs, indicated by the down pointing triangle in the screen navigation, allow a user to more quickly navigate to other parts of the menu.

Â	Collin COL	Procurement	★ Action Items 4	Notifications 35	📜 0.00 USD	Q. ?	•
	Orders & Documents > Approvals	My Approvals 🗟 👌 My Approvals - Requisitions					
	Group Results By: Folders	My Approvals Approval Notifications		Assign	•	Go	
1	Filtered By	My Recent Approvals	first	•		?	
1	Type: Requisitions Date Range: All Dates View Cyndy Smith - Approvals System Admin	Assign Substitute Approvers P a Purchasing Approval [31 results]		Resul	ts per folder: 20	•	Ш

Approvals via Mobile Devices

This feature was tested on an Apple iPhone in Safari and the GroupWise application. You will need to set up an approval code using the following instructions before being able to approve from your mobile device.

- 1. Access CougarMart from CougarWeb.
- 2. Go to the drop down beside your User Name at the top center of the landing page and choose View My Profile.

Â	🉈 🔍 CougarMart	Test User 🔻 🗼 Action Items 🚺 Notifications 🗎 30.00 USD 🔍 🛆
	Shop Shopping Dashboard Shopping Home Home/Shop	? Test User
	Shop Everything	View My Profile Logout View My Profile
	Go to: advanced search favorites forms non-catalog form	You do not have any recent orders

3. Your profile will open to User Profile and Preferences. Left mouse click on Update Security Settings to access the Change Email Approval Code.

i Home	🦾 🜨 🖸 Couga	rMart		Cyndy Smith 👻 ★	∎ ⁸⁸ . ↓¹⁰⁹) ; 86.40 USD	Search (Alt+Q) Q
📜 Shop	My Profile > User's Name, Phone Number, Em	ail, etc. 👻				
🔁 Orders	Cyndy Smith	User's Name, Phon	e Number, Email, etc.		₽ ?	
💋 Contracts	User Name CLSMITH	First Name	Cyndy			
Accounts Payable	User Profile and Preferences	Phone Number	Smith +1 972-758-3872 ext.			
Suppliers	Language, Time Zone and Display Settin App Activation Codes	ngs Mobile Phone Number	International phone numbers must begin with +			
Reporting	Early Access Participation Update Security Settings	×	International phone numbers must begin with +			
Administer	Change Email Approval Code Default User Settings	 Department 	Clsmith@collin.edu 🚾			
🔅 Setup	User Roles and Access Ordering and Approval Settings	> Position	IS/Reporting Manager			
	Permission Settings Notification Preferences	Authentication Method	Netid 🗸			
	User History Administrative Tasks	> User Name *	CISMILH			
		★ Required			Save Changes	

4. Scroll to the bottom of the page and enter a minimum of four characters as your Email Approval Code. (For security purposes, 10 bullets (•••••••) will be displayed no matter how many characters your approval code is.)

所 Home	Cougar	/lart	Cyndy Smith → ★ 🎮 🥺 🌲 1009 🗮 86.40 USD Search (Alt+Q) 🔍
	College eProci	urement	D ?
Shop	My Profile > User's Name, Phone Number, Email, etc.	▼ 117	
Orders	Cyndy Smith	User's Name, Phone Number, Email, etc.	B ?
Contracts	User Name CLSMITH	First Name Cyndy	
		Last Name Smith	
Accounts	User Profile and Preferences 🛛 👻		
Payable	User's Name, Phone Number, Email, etc.	Phone Number +1 972-758-3872 ext.	
Suppliers	Language, Time Zone and Display Settings		
	App Activation Codes	Mobile Phone Number	
Reporting	Early Access Participation		
	Update Security Settings 🛛 👻	E-mail Addre	
Administer	Change Email Approval Code	Change Email Approval Code	
	Default User Settings	Department	
Setup	User Roles and Access	Position Email Approval Code	
	Ordering and Approval Settings		
	Notification Professors	Authentication	
	Liser History	User Name *	
	Administrative Tasks		
		* Paguired	
		× vedaren	Save Changes

5. Left mouse click on the Save Changes button.

When you receive an e-mail, you will see details of the requisition and be able to approve from the eMail.

When utilizing the mobile device approval feature, be sure to turn off your email at the end of the day due to the software application's required 5 AM cycle.

Assigning a Substitute to Approval Folders

When you have planned outages you can use the following procedure to Assign Substitutes to folders for your approvals in **CougarMart**.

1. Go to the Orders slide out menu and choose Approvals then Assign Substitute Approvers-Requisitions.

🎢 Home			ugarMart			Temporary User 👻 ★	🍽 🌲 📮 61.00 USD	Search (Alt+Q)	۹ °
📜 Shop		🐂 Shop > Shopping > Shopping I	Home Home/Shop						
Order:	s 🖣	Orders	Type to Search Documents Q			Go			
	acts	Search	Approvals	og form quick orde	er Browse: suppliers categori	ies contracts chemicals			
p contro		Approvals	Requisitions to Approve						?
Payabl	nts le		Requisitions Recently Approved By Me	MERICA		~	Staples]	
Sta Suppli	0.00		Purchase Orders Recently Approved By Me	TO GO t CC Catering for	CC Catering for	Printer Cartridges and Consumable Offi	Consumable Office Supply ONLY		
	ers		Assign Substitute Approvers-Requisitions	SCC EV		Kibbons			
L Repor	ting		Assign Substitute Approvers-Purchase Orders Approval Notifications					1	?

2. Left mouse click on the Assign Substitute to All Requisition Folders button, or

ñ		ugarMart	Test User 🔻 🛛 ★ 🛛 Action Ite	ms 2 Notifications	s 📜 30.00 USD 🔍
_	COLLEGE	eProcurement			
	Orders & Documents / Approvals	Assign Substitute Approvers V Mar	age Substitutions - Requisition		
			Assign Substitute to All Requisition Fo	ders End Substitute fo	r All Requisition Folders
(1777)		Showing 1 - 1 of 1 results	All Folder Results	Assign Substitute to S	elected Folders 🗸 🔽 🖌
1	Filtered By	Results per page 20 💙	Sort by: Folder name ascending V		Page 1 of 1
•	Type: Requisition	Folder Name	Approver	Substitute	Action
ш	Refine Search Results ?	My PR Approvals	Test User		Assign
	Туре				
	Requisition 🗸				
	Approver				
	Test User (1)				

left mouse click on the checkbox beside the folders that you want to individually assign and left mouse click on the **Go** button to Assign Substitute to Selected Folders.

ñ		ugarMart	Test User ▼ 🛛 ★ 🛛 Action Ite	ems 2 Notifications) 📜 30.00 L	ISD Q
	Orders & Documents Approvals	Assign Substitute Approvers 🗢 👌 M	anage Substitutions - Requisition			
			Assign Substitute to All Requisition Fe	End Substitute for	All Requisition	Folders
		Showing 1 - 1 of 1 results	All Folder Results	Assign Substitute to Sel	ected Folders	Go
Ø	Filtered By	Results per page 20 💙	Sort by: Folder name ascending	·	Page 1 of 1	2
•	Type: Requisition	Folder Name	Approver	Substitute	Action	
ш	Refine Search Results ?	My PR Approvals	Test User		Assign	

3. You will be given an **Assign Substitute** window. If you left mouse click on the Include Date Range for Substitution checkbox, you will be given the option of selecting an approver and setting a Start Date and End Date. If you set a Start Date, you must set an End Date.

	Couga	rMart		Temporary User 🔻 🔺 🏴 🌲 🛱 61.00 L	SD Search (Alt+Q) Q
	COLLEGE eF	Procurement			
	Orders > Approvals > Assign Substitute Appr	overs-Requisitions 🗢 🗦 Manage Substitutions - Requisition			
💭 Orders				Assign Substitute to All Requisitions Folders End Su	
		Showing 1 - 1 of 1 Results	All Folder Results		Substitution Actions 👻
	Search Details	1 Results Per Page 20 V	Sort by: Folder name ascent	ding ~	Page 1 of 1 📄 ?
		Folder Name	Approver	Substitute	Action 🗹
	Filtered by	My PR Approvals	Temporary User		Assign
	Type: Requisitions	Assign Subs	x x		
	Refine Search Results	Assign 5003	litute		
		☑ Include Date Range for	Substitution		
	Type Remisitions	Substitute Name *	Type to filter Q		
	Announ	Start Date *	II (9)		
	Temporary User (1)		mm/dd/yyyy hh:mm a		
		End Date *			
			mm/dd/yyyy hh:mm a		
		* Required	Assign Close		

4. Begin typing the substitute's name to receive a short list to select an approver.

Â	se Co	ougarMart	Test User 🔻 🛛 ★ 🛛 Action Ite	ems 🙎 🛛 Notificatio	ns 🍹 30.00 U	SD 🛛 🔍
	COLLEGE	eProcurement				?
Ì	I Orders & Documents Approv	als 👌 Assign Substitute Approvers 🔻 👌 Mar				
١		Change 1 1 of 1 and 1	Assign Substitute to All Requisition Fo	End Substitute	for All Requisition	Folders
-		showing I - I of I results	All Folder Results			00
E .	Filtered By	Results per page 20 V	Sort by: Folder name ascending		Page 1 of 1	▶ ?
fft	Type: Requisition	Folder Name	Approver	Substitute	Action	
m	Refine Search Results ?	Assign Substitute		? X	Assign	
	Туре	Include Date Range for Substitution	1			
	Requisition 🗸	Substitute Name:				
	Approver	Substitute Name.				
	Test User (1)					
		As	sign Cancel			
		·				

- 5. Left mouse click on the **Assign** button.
- NOTES: As with all technology and information resources of Collin College District, User Names and Passwords in **CougarMart** should not be shared.

The assignee should ideally be at the same administrative level or higher, must have gone through **CougarMart** training, and be set up as a user in **CougarMart**.

6. The **End Substitute tor All Requisition Folders** button will be visible. The **Substitute** and range of dates will be displayed beside each folder.

 increte increte	<u> </u>		1 2			
image: shop Orders > Approvals > Assign Substitute Approvers-Requisitions = Requisitions image: contracts Contracts image: contracts Search Details image: contracts Search Details image: contracts Filtered by image: contracts Temporary User image: contracts Filtered by image: contracts Temporary User image: contract Filtered by image: contract Temporary User image: contract Filtered by image: contract Temporary User image: contract Filtered by	i Home	Cougarl	Mart		Temporary User 🔻 🖊 🖊	23 2 61.00 USD Search (Alt+Q) Q
Image: Source of contracts Search Details Image: Source of contracts Source of contracts Source of contracts Search Details Image: Source of contracts Source o	📜 Shop	Orders > Approvals > Assign Substitute Approver	s-Requisitions 👻 🗲 Manage Substitutions - I	Requisitions		
Contracts Search Details Results Prage 20 Sort by: Folder name scenders? Results Prage 1 of 1 state Accounts Filtered by Type: Requisitions Temporary User Cindy White Cindy White Remove Cindy White Refine Search Results Type Refine Search Results Temporary User Cindy White Cindy White Remove Cindy White Type Refine Search Results Type Refine Search Results Tipe Refine Search Results Tipe Type Refine Search Results Tipe Cindy White Cindy White Cindy White Cindy White Substitute Cindy White Cindy White Cindy White Cindy White Cindy White Cindy White Substitute Cindy White Cindy White Cindy White Cindy White Cindy White Cindy White Substitute Cindy White Cindy White Cindy White Cindy White Cindy White Substitute Cindy White Cindy White Cindy White Cindy White Substitute Cindy White Cindy White Cindy White Cindy White	Orders		al - 		Assign Substitut to All Requisitions	Folders End Substitute for All Requisitions Folders
Search Details Search Details Fittered by Type: Requisitions Refine Search Results Type Requisitions Refine Search Results Refine Search Resul	Contracts		Showing 1 - 1 of 1 Results	A	I Folder Results	
Image: Accounts Payable Filtered by Justifier Image: Suppliers Type: Requisitions Image: Reporting Refine Search Results Type Type Requisitions \rightarrow Approver Type Requisitions \rightarrow Approver Type Requisitions \rightarrow Approver Type Requisitions \rightarrow Approver Type (Requisitions \rightarrow Approver Type (Requisitions \rightarrow		Search Details	Results Per Page 20 V	Sort by:	Cubatieute	Page 1 of 1 💌 ?
Type: Requisitions Surprise Image: Refine Search Results Type: Requisitions Type: Requisitions Approver Temporary User (1) Substitute Clindy Wite (1)	Accounts Pavable	Filtered by	My PR Approvals	Temporary User	Cindy White	Remove
	Suppliers	Type: Requisitions			Start Date: 02/04/2020 12:00 PM => End Date: 02/04/2020 5:00 PM	
	II. Reporting	Refine Search Results Type Requisitions Approver Temporary User (1) Substitute Cindy White (1)				

7. If you did set a date range, the substitution will automatically end. If you did not set a date range upon your return, you will need to left mouse click on the **End Substitute for All Requisition Folders** button to return approvals to yourself.

Document Search

The simple document search is similar to the simple product search from the **CougarMart Home** page. If you leave the search on All Documents you will get both purchase orders and requisitions. You can use the drop down to change from searching All Documents to search for either Requisitions or Purchase Orders.

😭 Home	😹 오 🛛 CougarN	lart				l l	Temporary User 🗸	★	۳	🔎 ²³ 📜 61.00 USD	Search (Alt+Q)	٩
	COLLEGE eProcu	rement										?
📜 Shop	Orders > Search > Search Documents - > Docum	nent Search										
🔂 Orders		Search	All Documents	~		All Dates		\sim	Go			
			All Documents		er search terms such as document numbers, suppliers, a	ind product informat	ion.					
📝 Contracts			Requisitions		io to: advanced search my requisitions my purchas	e orders my invoic	es					
			Purchase Orders									
Payable			Invoices									
			invoices									
Inter Suppliance												

You can use the default All Dates, or you can use the drop down to select preset times, or you can use the Custom Date Range.



By left mouse clicking on the advanced search link below the simple search,

🖌 Home	👗 🔍 CougarM	art		Temporary User 🔻	* 🏴	🔎 ²³ 📜 61.00 USD	Search (Alt+Q)	٩
	eProcure	nent						?
) Shop	Orders > Search > Search Documents > Documer	Search						
🐻 Orders	s	earch All Documents ~	All Dates		~ Go			
_		Enter search terms such as document numbers, suppli	ers, and product informatio	on.				
💋 Contracts		Go to advanced search my requisitions my pur	chase orders my invoice	5				
Accounts								

you can enter other search criteria.

*	Test User 🗸 🖈 Action Items 💈 Notifications 🍹 30.00 USD	٩
	eProcurement	?
Ì	In Orders & Documents Document Search Documents 🗢 Document Search	
	Search All Documents V Go	
	Go to: advanced search my requisitions my purchase orders	

Once your search is complete, your search criteria will be displayed on the left with other options to Refine Search Results and your documents will be displayed on the main part of the screen.

Shop Orders Search > Search > Search > Search > Document Search Corders Case of the search Start New Search Stowing 1 - 22 of 22 Results Today (2/4/2020-2/4/2020) Create Quantity Receipt ~ (2/2) Create Quantity Receipt ~ (2/2) Contracts Search > Details ? Results Per Page Soon > Source Page Soon > Source Page	?
Contracts Search Details Contracts Contracts Search Details Contracts Contracts Search Details Contracts Contracts Search Details Contracts Contracts Search Details Contracts Co	
Contracts Search Details P Results Per Page Sourd by: Best match Image: Creation Date/Time Requisition No. Requisitioner Supplier Status PO Total 	Go
Accounts Filtered by PO No Supplier Creation Date/Time Requisition No. Requisitioner Supplier Status PO Total Accounts Payable Filtered by PO No Supplier PO No Supplier PO Total PO Total PO Total PO Total PO Total PO Total Limitless Office Products 2/4/2020 10:49 AM 128907120 Kelly Rossato Sent 41.58 USD PO Total Limitless Office Products 2/4/2020 10:49 AM 128731203 Sent 41.58 USD 2/1.62 USD Diate Range: Today Sent 2/1.62 USD Quality Logo Products Inc 2/4/2020 10:45 AM Tracey Bradley Sent 27.512 USD Diate Range: Today Sent 27.512 USD	?
Accounts Filtered by Poscept7 Limitless Office Products 2/4/2020 10:49 AM 128907120 Kelly Rossato Sent 41.58 USD C Payable Type: Purchase Orders Date Type: Purchase Orders Quality Logo Products Inc. 2/4/2020 10:49 AM 128907120 Kelly Rossato Sent 41.58 USD C Poscept6 U Quality Logo Products Inc. 2/4/2020 10:46 AM 128731203 Tracey Bradley Sent 291.62 USD C Poscept6 U Quality Logo Products Inc. 2/4/2020 10:45 AM 128730668 Tracey Bradley Sent 275.12 USD C	
Suppliers Date Type: Creation Date (System) Quality Logo Products Inc 2/4/2020 10:46 AM 128731203 Tracey Bradley Sent 291.62 USD C Poscepre U Quality Logo Products Inc 2/4/2020 10:46 AM 128731203 Tracey Bradley Sent 291.62 USD C Poscepre U Quality Logo Products Inc 2/4/2020 10:45 AM 128730668 Tracey Bradley Sent 275.12 USD C	
👔 Suppliers Date Range: Today 🗸 🖓 0062975 🗟 🖞 Quality Logo Products Inc 2/4/2020 10:45 AM 128730668 Tracey Bradley Sent 275.12 USD	
Same New Search Exponsion y P0062974 U Quality Logo Products Inc 2/4/2020 10:44 AM 128729874 Tracey Bradley Sent 496.58 USD Control	
✓ P0062973 Staples Business Advantage 2/4/2020 10:28 AM 128906121 Susan Mathews Sent 117.71 USD □	
Refine Search Results ? V posca972 U JP Morgan Chase Bank, NA 2/4/2020 10:06 AM 128896182 Julie Nevarez 1,187.58 USD	
1/pe / P0052970 U Amigos Library Services 2/4/2020 9:36 AM 128806257 Megan Buchanan Sent 70.00 USD	
Purchase Orders	
Date Range ✓ P0052956 🔍 🖞 JP Morgan Chase Bank, NA 2/4/2020 9:10 AM 128882563 Donna Ludwig 1,819.10 USD	
Today V Posc2967 U Papa John's 2/4/2020 9:08 AM 128669413 Betty Geiger Sent 497.01 USD	
✓ P0052966 🔍 Ü Ruffalo Noel Levitz LLC 2/4/2020 9:05 AM 128834299 Gwyn Best Sent 4,961.25 USD	
Vonchow Status Completed (22) / P0622964 🔍 🕖 Intelligent Interiors Inc 2/4/2020 8:46 AM 128861140 Donna Ludwig Sent 17,279.68 USD	
Sumplar V P062263 U ULINE Inc 2/4/2020 8:39 AM 128738940 Liss Zachmann Sent 120:24 USD	
P Morgan Chase Bank, NA (7) POG22962 Fire and Life Safety America 2/4/2020 8:36 AM 128752558 David Campbell Sent 233.00 USD [
Staples Business Advantage (4)	
Calamy Cogly Products in (s) ULNE (t) (mort) (mort) ↓ PMorgan Chase Bank, NA 2/4/2020 8:29 AM 128880095 Mary Johnson 211:95 USD [
Department 🐺 Vorgan Chase Bank, NA 2/4/2020 8:26 AM 128875553 Darlene Weingart 357.84 USD	
Office - Provost (Office - Provost) (5) / PMorgan Chase Bank, NA 2/4/2020 8:21 AM 128866994 Karen Martin 549.76 USD	
Ob Menu Search (3) PORC2958 U JP Morgan Chase Bank, NA 2/4/2020 8:12 AM 128864721 Jinger Peeples 69:56 USD	
President Office (President Office) (3) V PO62957 (2) Staples Business Advantage 2/4/2020 8:11 AM 12892267 Mary Jane Gibbons Sent 37.26 USD (2)	

If you choose to **Search** by only Requisitions or Purchase Orders instead of All Documents, you will get additional search criteria such as Prepared For, Prepared By, Date, Total Amount, Supplier, Department, Catalog Number (SKU), Product Description, Commodity Code, Form Name, Form Type, Contract Number, **Workflow, Workflow Status, Status Flags,** and **Customs Fields.** The **Custom Fields** include Account and Index.

ñ	CougarMart	Temporary User ▼ ★ I ▲ 423 〒 61.00 USD Search (Alt+Q) Q ^
Ì	Orders > Search > Search Documents > Document Search	
	Search Requisitions ~	simple search
1	Requisition Identification	
血	Requisition Number(s) Requisition Name	

CCCCD CougarMart Approver Guide

	Requisition Information	
1	Participant(s)	⊖ Any ⊖ Me
		٩
Ø	Prepared For	٩
	Prepared By	م
血	Date	Submit Date V Today V
	Total Amount	
	Supplier	^D
	Department	
<u>ll.</u>	Item/Product Information	
	Catalog Number(SKU)	
	Product Description	
	Commodity Code	٩
	Form Name	
	Form Type	٩
	Product Flags	🗆 🛱 Controlled substance 🗆 🛃 Energy Star
		A Green A State of the state of
	Contract Information	
4	Contract Number	م
<u>×</u> C	Contract Number	· · · · · · · · · · · · · · · · · · ·
4	Purchase Order Identification	tion
Ø	Purchase Order Number(s)	5)
fft	Workflow	
	Current Workflow Step	م
ą.,		
A Ē	Workflow Status	
Ы.	Completed Pendi	ding
Ш.	□ Rejected □ Withd	Idrawn
	Status Flags	
	With Rejected Lines	With Withdrawn Lines
	With Errors	U With Attachments
	With Trade-In Items	With Receipt Based Invoice
	Custom Fields	
	Account Is Exact	ctly V Add another Account
d.		Select from all values
	Delivery Location Is Exact	tly Add another Delivery Location Select from all values
		Select non all values
	Description Is Exact	ctly V Add another Description
	Index Is Exact	ctly V Add another index
		Select from all values
	Location Is Exact	ctly V Add another Location
		Select from all values
00	Go to: simple	ple search my requisitions my purchase orders my invoices
		Q Search
>		Powered by JAGGAER Privacy Policy

Document Status (History)

 From your Document (Requisition or Purchase Order) History tab, click on the + (plus) beside Click to filter history below the Requisition/PR Approvals/Comments/Attachments/History tabs

Approv	ais/ Comments/ Attachments/ i	nistory tabs.	
🏦 Home	CougarMart	Tempora	ary User 👻 🛧 🏴 🙏 🔁 🗮 61.00 USD 🛛 Search (Alt+Q) 🔍 🛆
📜 Shop	Orders > Search > Search Documents -> History - Requisition 128906121		
Orders	< Back to Results 7 of 22 Results ▼ < >		Available Actions: Copy to New Cart
💋 Contracts	Requisition PR Approvals Comments Attachments History		
Accounts Payable	Click to filter history	2	Export CSV
Suppliers	Results Per Page 20 ~	Records found: 21	■ Page 1 v of 2 ▶ ?
	Line No Date/Time User Step(s)	Action 🗠 Field Name 🗠 Fr	om To Note
Reporting	2/4/2020 System 10:28 AM	Requisition approval process completed	

2. When the **Filters** window opens, you can enter a Start date, End date, or select from the Show history for drop down. If you choose All and then click on the Apply button, you will be able to view the history of both the requisition and the purchase order.

	5		1	1		
🎢 Home	CougarMa	art		Temporary User 🔻 🔺 🏴	▲ ²³ 📜 61.00 USD Search (Alt+Q)	٩
📜 Shop	Orders > Search > Search Documents -> History - F	equisition 128906121				
🔁 Orders	Back to Results 7 of 22 Results	ts 🔻 🔇 🗲			Available Actions: Copy to New Cart	∽ Go
Contracts	Requisition PR Approvals Comments Attachments	History				
p conducto						🖨 ?
Accounts Payable	- Filters		?			
a	Start date					
Suppliers	End date	I				
Reporting	Action mm/dd/yyyy					
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	All				Ev	nort CSV
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	Results Per Page 20 V Purchase Order		Records found: 21		▲ Page 1 of	2 🕨 ?
	Line No ≏ Date/Time▼ U Invoice	Step(s)	Action Field Name	- From	То	Note
	2/4/2020 Syster Receipt 10:28 AM	Requisition	approval process completed			

Passwords

The **CougarMart** eProcurement application uses single sign-on. This became effective 8/1/2013.

For **CougarMart** access, the hiring supervisor should complete the IT Services Request form, or complete the following information in an e-mail to the Purchasing IS/Reporting Manager:

Name: {First and Last Names} Username: CWID: Location: {Campus and Room Number} Department: Supervisor: Classification: FT or PT Staff Position: Cost Center: Start Date: MM/DD/YYYY Requested by:

ACTION(S) REQUESTED:

Banner-Purchasing-Approvals (or Requisitions) Access Request

Employee email: Employee Phone Number: {all 10 digits} Employee is replacing:

How to Change Your eMail Notifications

1. Go to the drop down beside your User Name at the top center of the landing page and choose View My Profile.

🎢 Home	CougarMart CougarMart				Temporary User 🔻 🖈 🏴 斗 🔁 🗮 61.00 USD 🛛 Search (Alt+Q)	q ^ ?
📜 Shop	🐂 Shop > Shopping > Shopping Home 🔻 > Home/Shop				Temporary User	
-					View My Profile	
Orders	Sho	p Everything			Dashboards	
-	Go to: ad	wanced search favorites forms	non-catalog form quick order	Browse: suppliers catego	n Manage Searches	
Contracts					Manage Search Exports	
	Welcome to CougarMart!	 Showcased Supplier 	S		Logout	· ·
Payable	CougarMart Approver Guide	[]	AMERICA		You do not have any recent orders	
s	CougarMart Requisitioner Guide	amazon	TO GO Contact CC Catering for	BH	Third contrages and ONIX	

2. In the **My Profile** under User Profile and Preferences, left mouse click on the Notification Preferences option.

🞢 Home	🙇 🔍 Couga	rMart		Temporary User 👻 🖈 🏴 🔎 🖾 🗑 61.00 USD	Search (Alt+Q)				
	COLLEGE ef	Procurement			?				
📜 Shop	My Profile 🗲 User's Name, Phone Number, Em	My Profile > User's Name, Phone Number, Email, etc. 🕶							
Orders	Temporary User	User's Name, Phon	e Number, Email, etc.	?					
💋 Contracts	User Name PUR_TEMP1	First Name	Temporary						
Accounts Payable	User Profile and Preferences	Last Name Dhone Number	User						
Suppliers	User's Name, Phone Number, Email, etc Language, Time Zone and Display Settin	igs	+1 9/2-758-38/3 ext. International phone numbers must begin with +						
	Early Access Participation	Mobile Phone Number							
Reporting	Default User Settings	> E-mail Address *	International phone numbers must begin with +						
	User Roles and Access	>	Cougarmartsupport@collin.edu 🗠						
	Ordering and Approval Settings	> Department	Purchasing (Purchasing)						
	Notification Freierences	Position	Purchasing Coordinator						
	User History	> Authentication Method	Local						
		User Name *	PUR_TEMP1						
		★ Required		Save Changes					

3. Left mouse click on the notification, such as Shopping, Carts & Requisitions, that you want to change.

My Prdfe Votification Preferences Sequences Subpoint Image: Carte & Requisitions <	Couga			Temporary User 👻 🛧 🏴 🔺 🗮 61.00 USD Search
Temporary User Vatification Preferences: Shopping, Carts & Requisitions It at section ? User Name PUR_TEMP1 The in-application notifications are not yet available for all Email Notifications. ? User Porfile and Preferences Prepared By - Cart Assigned Notice International Notifications. ? Update Security Settings Prepared By - Prepared B	My Profile > Notification Preferences >	Shopping, Carts & Requisitions 👻		
User Name PUR_TEMP1 The in-application notifications are not yet available for all Email Notifications. 7 User Profile and Preferences >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	Temporary User	Notification Preferences: Shoppin	ıg, Carts & Requisitions	✓ Edit Section 2
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- 4. Left mouse click on the Edit Section link in the upper right corner.
- 5. Left mouse click on the Override radio button for a specific notification, such as the PR pending Workflow Notification available which controls if you receive either an e-mail, notification, or both.

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6. Left mouse click on the down pointing carot beside the notification.

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- 7. Left mouse click on the **Save Changes** button at the bottom right.
- 8. Return to the **Home** page.

CougarMart Training Website

The **CougarMart** training website can be access thru the My Workplace tab. It will be in the eProcurement channel right below the My Workplace tab.