



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, hharper@collin.edu, 972-758-3873

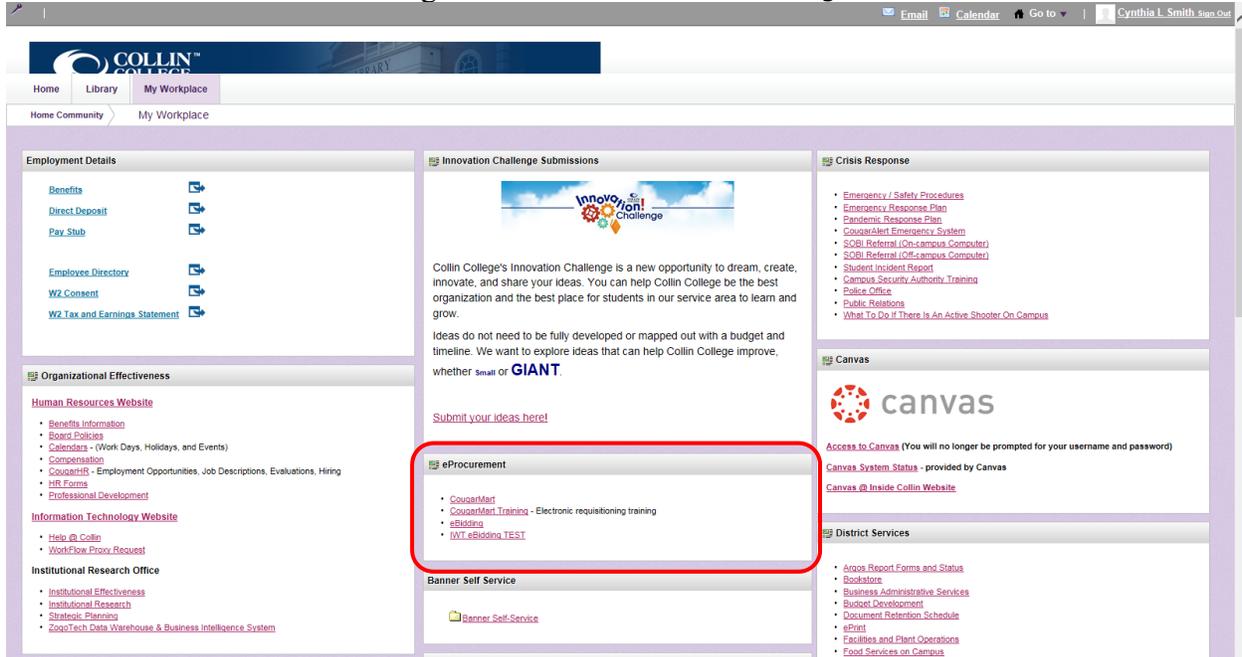
For questions concerning setting up new suppliers, contact Jill Stine, Purchasing Assistant, jstine@collin.edu, 972-758-3874

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

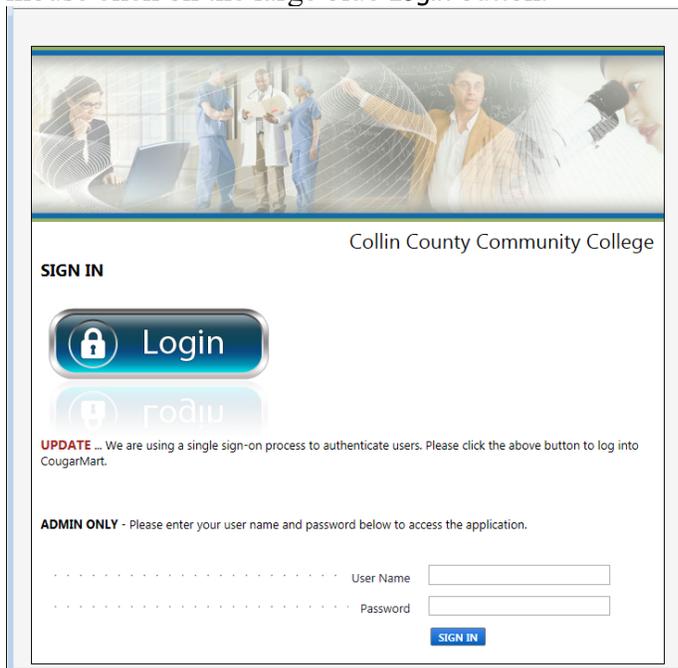
Questions concerning new users, and new and existing forms, contact Cyndy Smith, Purchasing IS/Reporting Manager, clsmith@collin.edu, 972-758-3872

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.

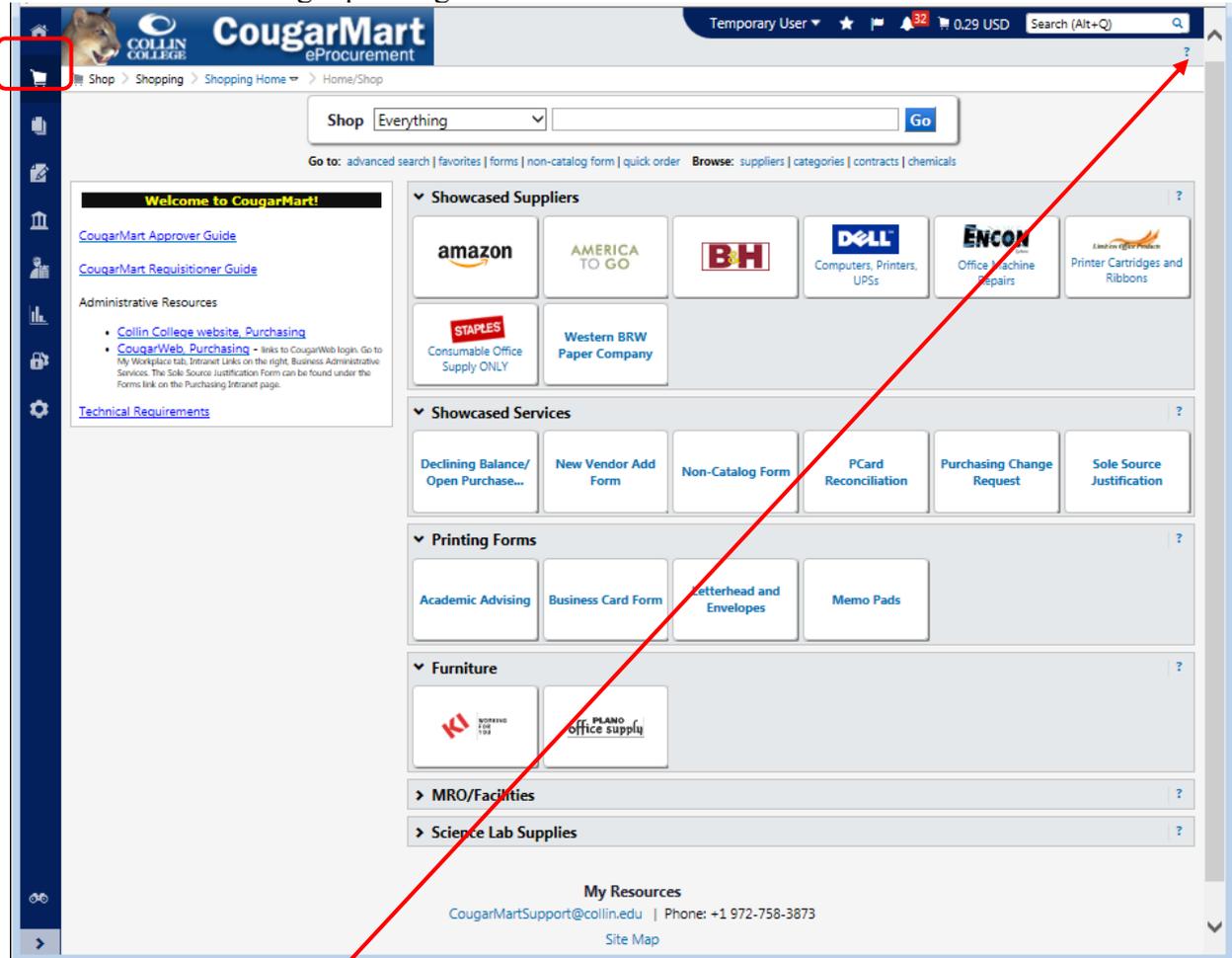


Production **CougarMart** can be accessed thru the hyperlink in the eProcurement channel of My Workplace tab of CougarWeb. We utilize single sign-on, so you do not need a User Name nor a Password. If you are logged into CougarWeb and receive the **CougarMart** login screen, just left mouse click on the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

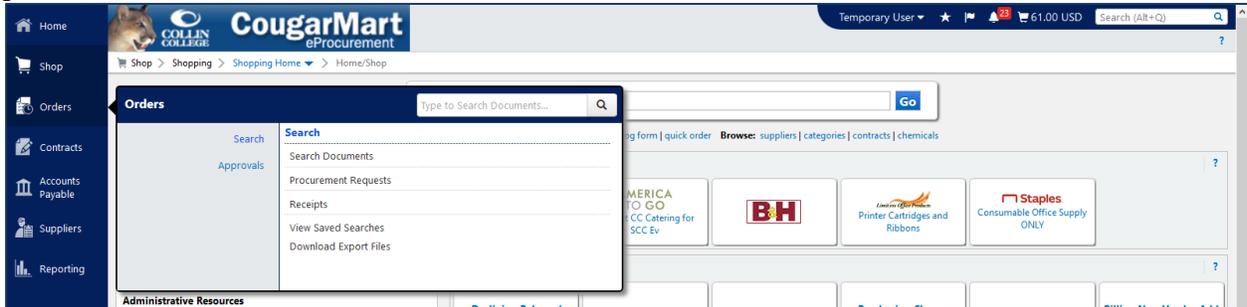
Navigation

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.

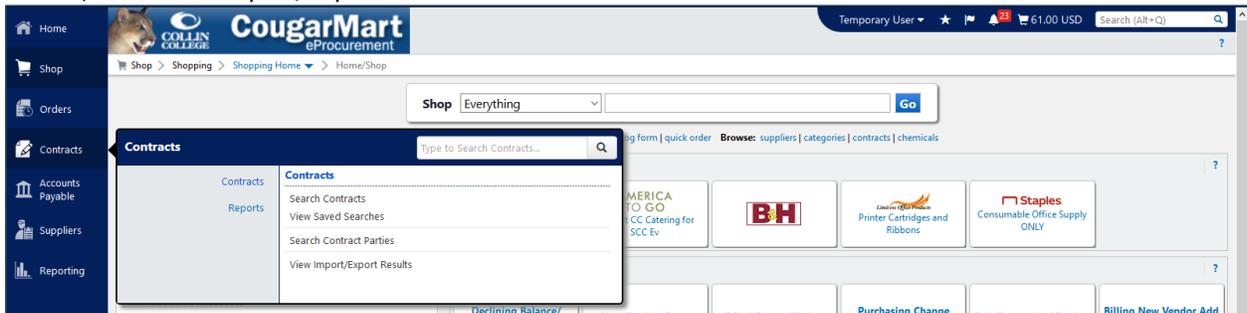
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The Home page allows requestors to search for goods and services from contracts and **Showcased Suppliers**.

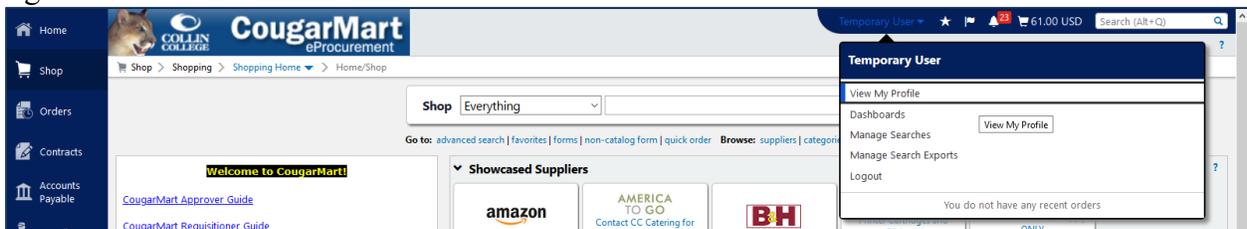
The Orders menu allows you to Search Documents, view Procurement Requests for a specific period, search Receipts, View Saved Searches, and Download Exported Files.



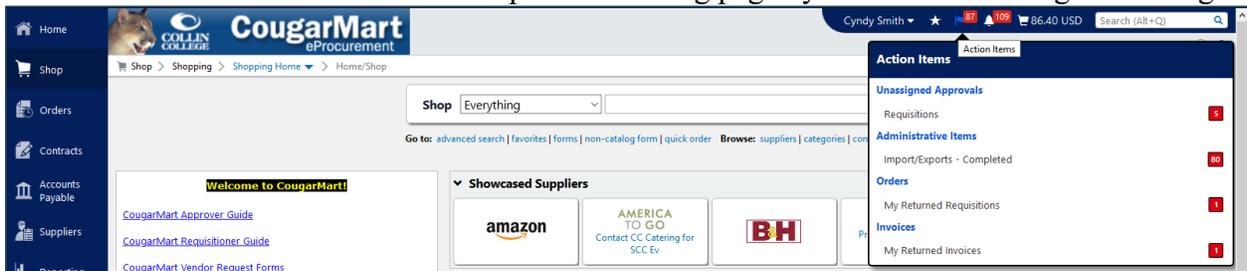
The Contracts menu allows you to search for contracts, View Saved Searches, Search Contract Parties, and View Import/Export Results.



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

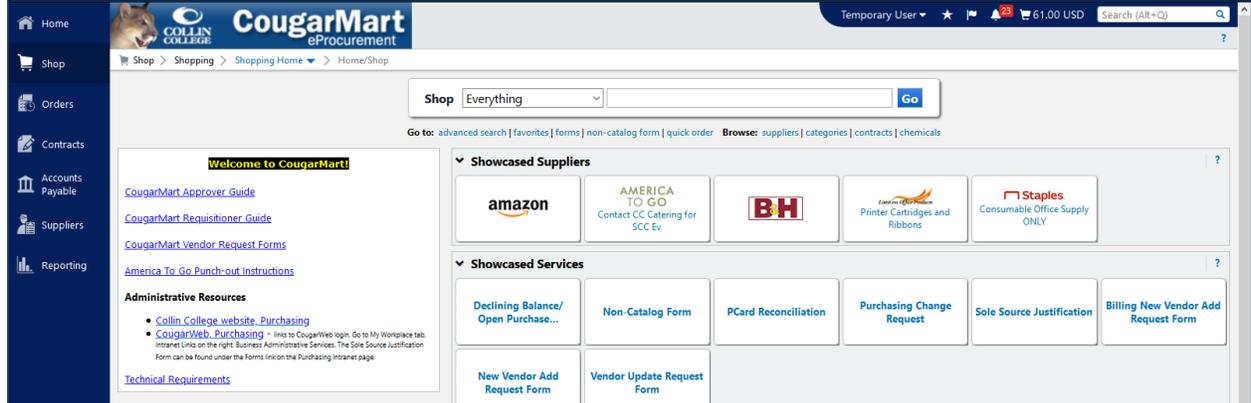


Action Items can be accessed from the top of the landing page by left mouse clicking on the flag.



The message board on the left hand side of the page displays **Welcome to CougarMart!** followed by hyperlinks to the **CougarMart Approver** and **Requisitioner Guides**, **CougarMart Vendor Request**

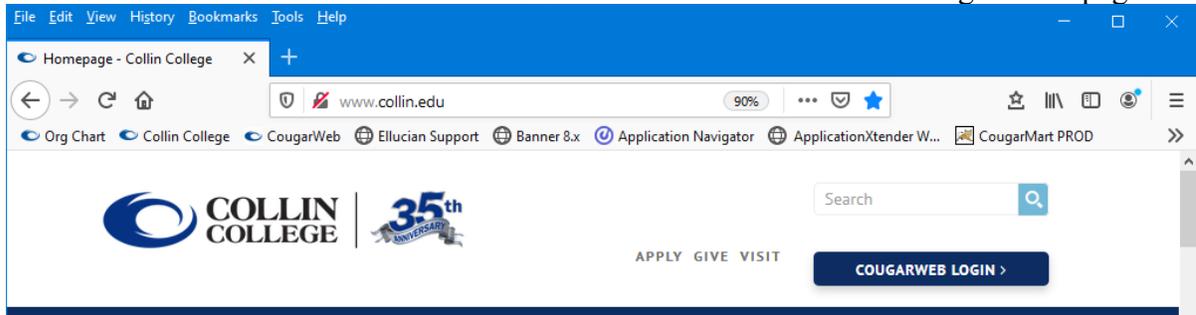
Forms, America To Go Punch-out Instructions, Administrative Resources (Collin College website, Purchasing and CougarWeb, Purchasing), and the Technical Requirements to run the application.



Approving Requisitions

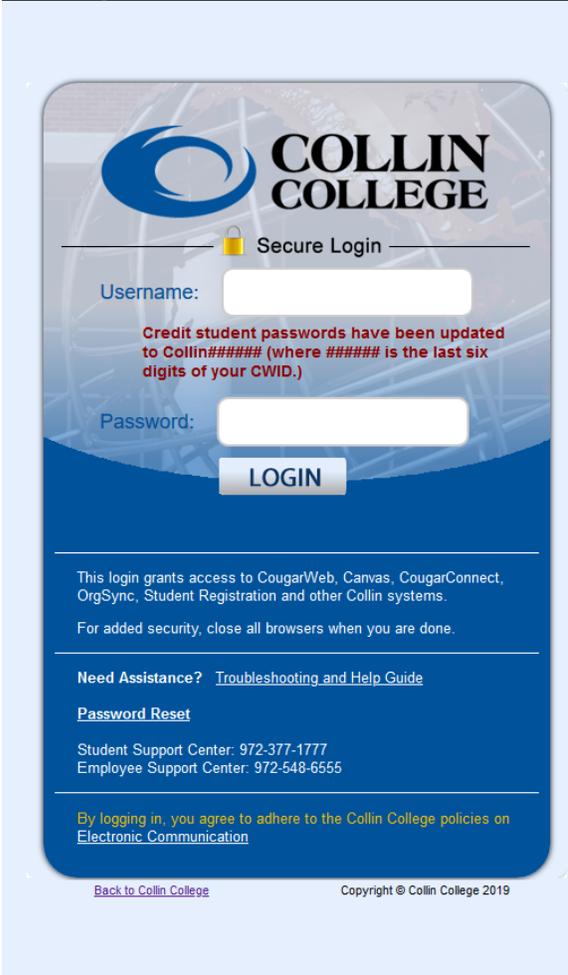
When Requestors submit their cart for approval, it will go thru **Banner Budget Authorization** before being placed on the approval path. Once budget has been approved, the application will send an e-mail to the first approver notifying them that they have a document awaiting their approval. The approver 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.



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

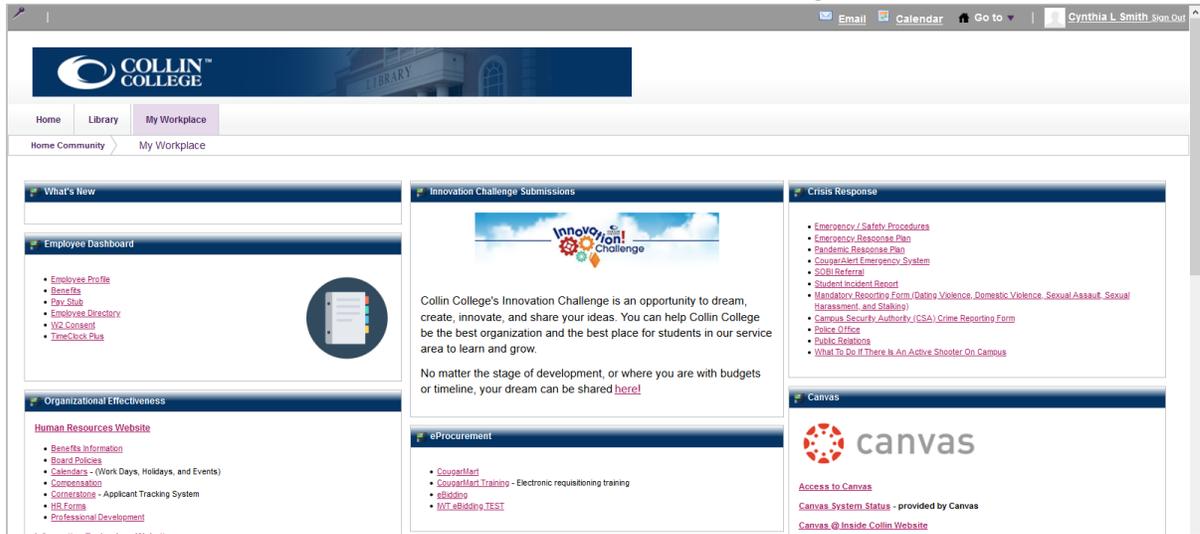


The image shows a secure login page for Collin College. At the top left is the Collin College logo, a blue stylized 'C' with a white swoosh. To its right, the text 'COLLIN COLLEGE' is displayed in a bold, black, sans-serif font. Below the logo and name is a horizontal line with a yellow padlock icon and the text 'Secure Login'. Underneath this are two white input fields: 'Username:' and 'Password:'. Between these fields is a red text warning: 'Credit student passwords have been updated to Collin##### (where ##### is the last six digits of your CUID.)'. Below the password field is a blue button with the word 'LOGIN' in white capital letters. Below the login fields is a paragraph of text: 'This login grants access to CougarWeb, Canvas, CougarConnect, OrgSync, Student Registration and other Collin systems. For added security, close all browsers when you are done.' Below this is a section titled 'Need Assistance?' with a link to 'Troubleshooting and Help Guide'. Underneath is a 'Password Reset' link. Further down are contact numbers: 'Student Support Center: 972-377-1777' and 'Employee Support Center: 972-548-6555'. At the bottom, there is a yellow text line: 'By logging in, you agree to adhere to the Collin College policies on Electronic Communication' with a link. At the very bottom, there is a 'Back to Collin College' link and a copyright notice: 'Copyright © Collin College 2019'.

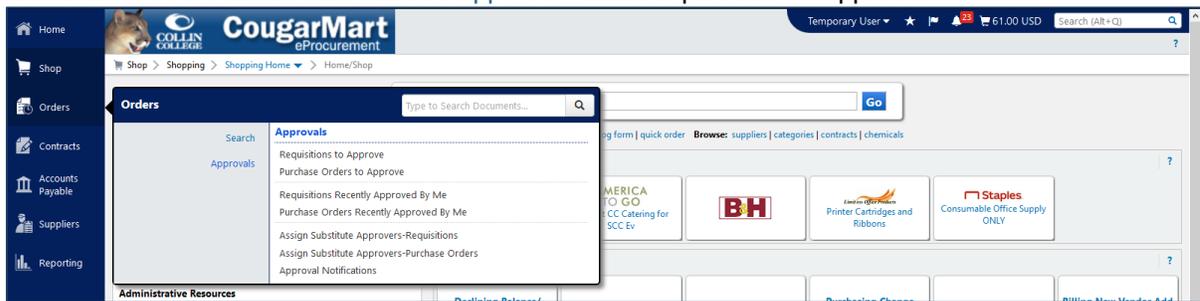
3. Left mouse click on the My Workplace tab.



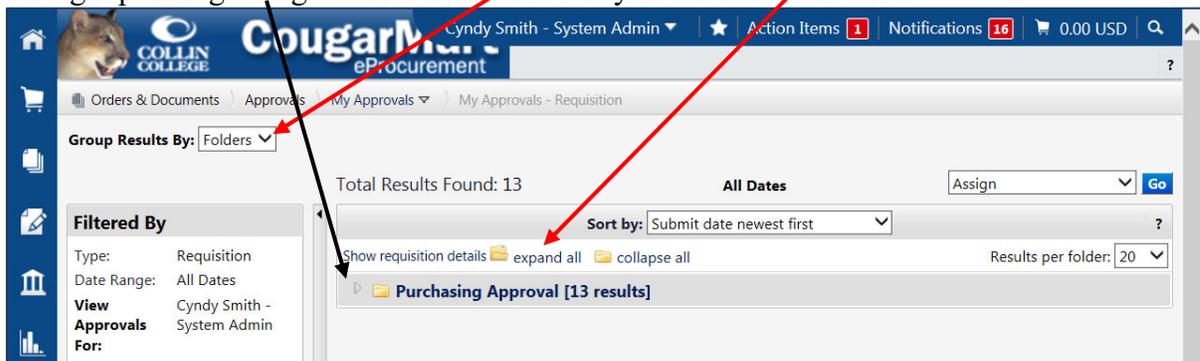
4. Go to the eProcurement channel and left mouse click on the **CougarMart** link.



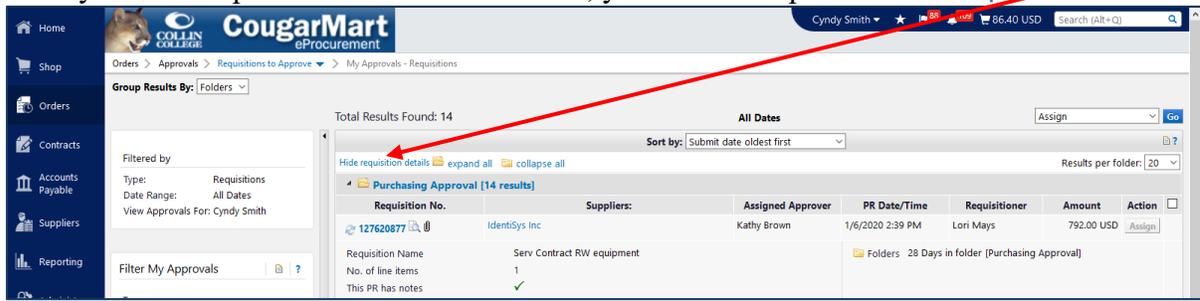
5. Go to the **Orders** menu and choose **Approvals** then Requisitions to Approve.



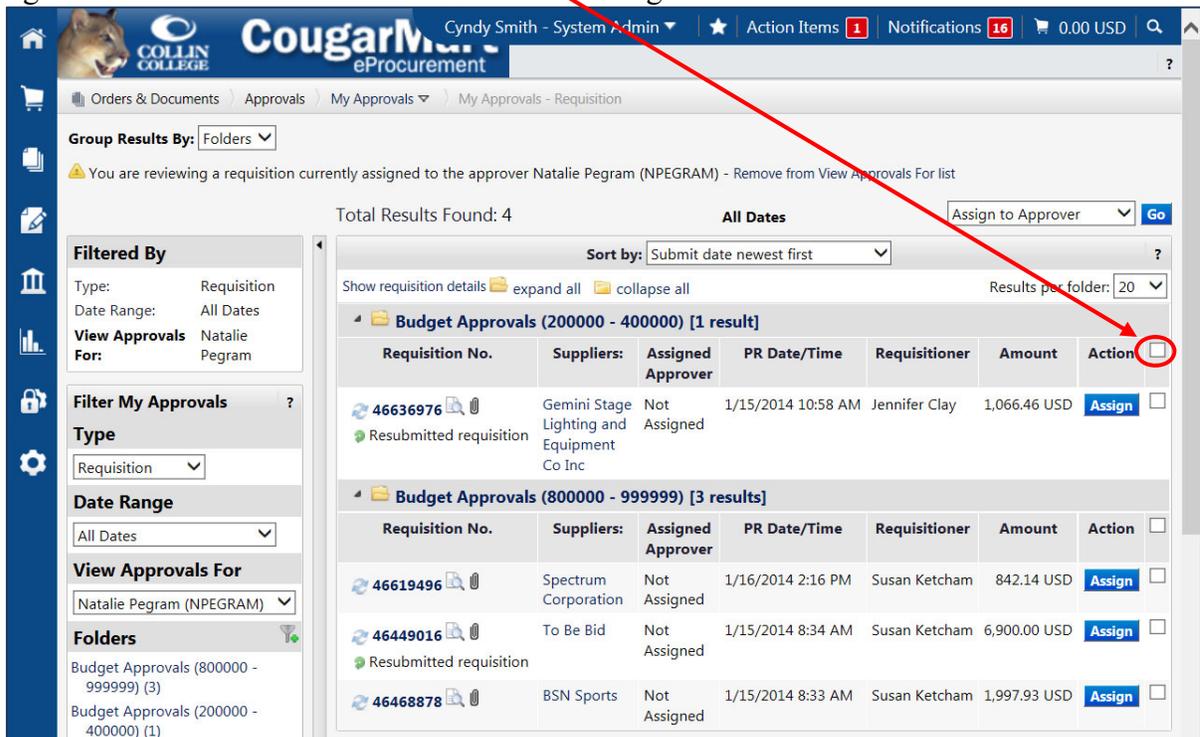
6. The default view will be **Group Results By:** Folders with the folder(s) collapsed. To expand the folder and view all requisitions, left mouse click on the expand all, or left mouse click on the right pointing triangle beside the folder that you want to work with.



- Once you have expanded the folder or folders, you have the option to [Hide requisition details](#).

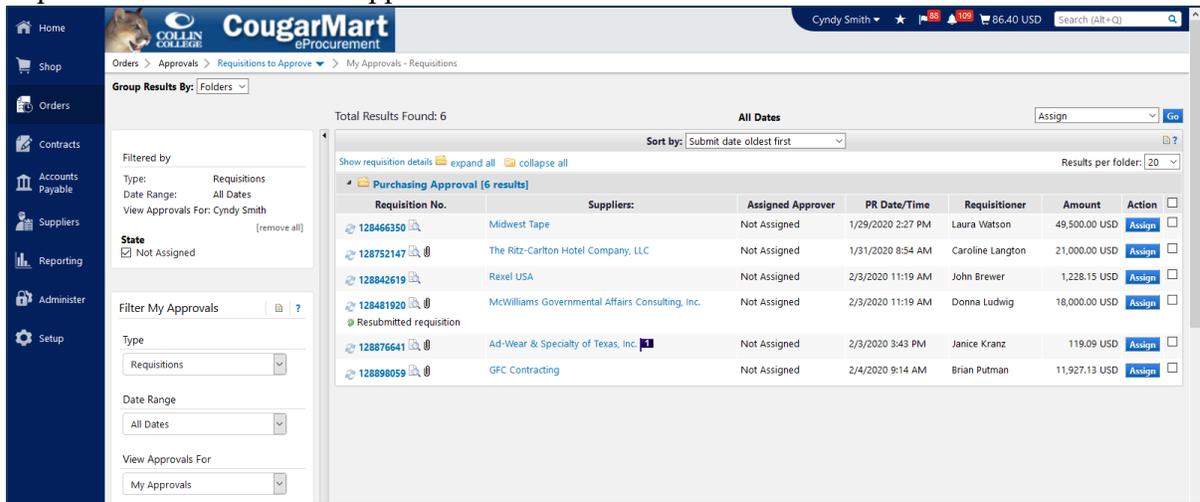


- You can select the header-level checkbox to apply the Assign action to all documents the left mouse click on the **Go** button to assign them to yourself; or you can assign individual documents by left mouse clicking on the box to the right of the document. You can also left mouse click the checkbox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



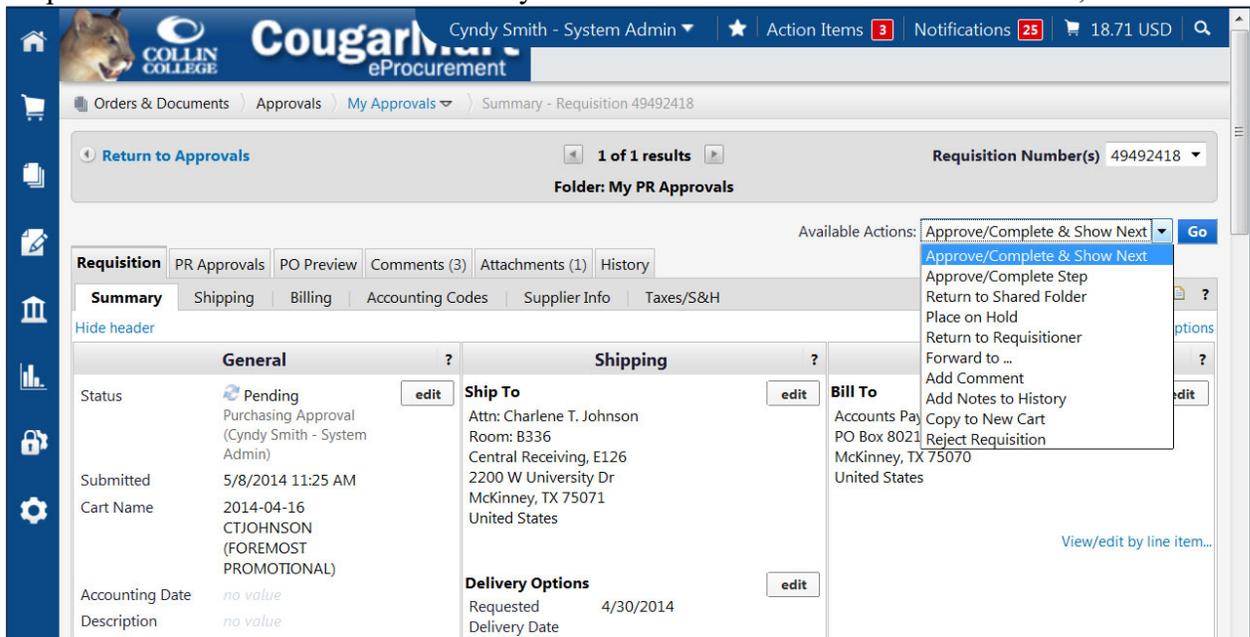
- There can be both Not Assigned and Assigned requisitions in approval folders. All requisitions must have a state of Assigned before they can be approved. You can determine the **State** of a requisition by looking at the **Assigned Approver** column. If a requisition is Assigned it will contain the 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

requisitions that need to be approved.

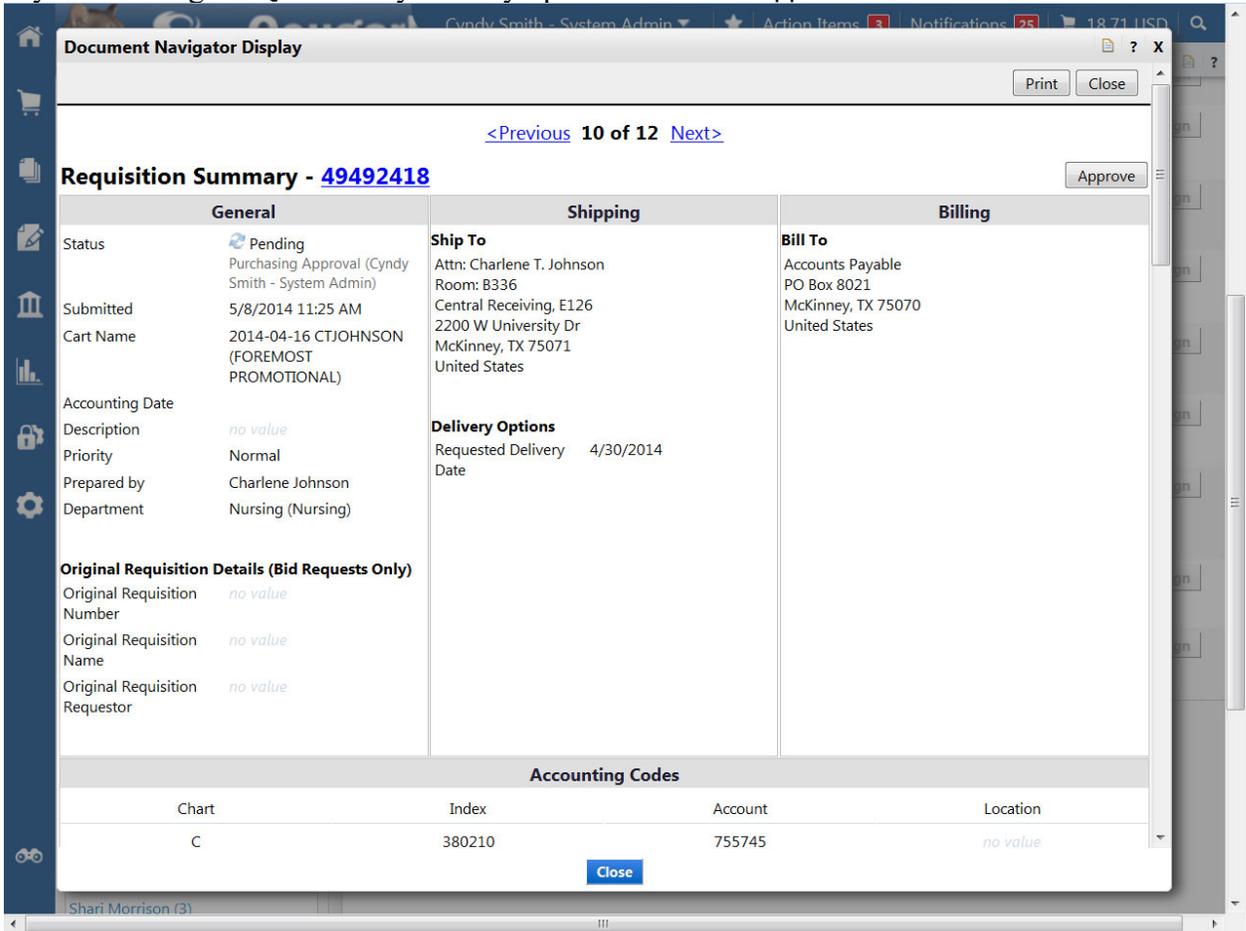


NOTE: You will not get the Return to Shared Folder, Place on Hold, Return to Requisitioner, Forward To..., and Reject Requisition actions from within a document until you have assigned the document to yourself.

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



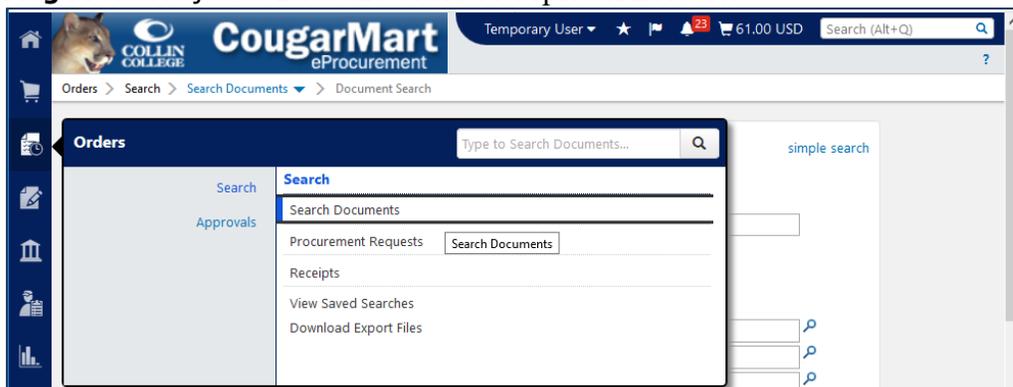
If you are using the Quick View your only options will be to Approve.



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.



Search Requisitions simple search

Requisition Identification
 Requisition Number(s)
 Requisition Name

Requisition Information
 Participant(s) Any Me Pick...
 Prepared For
 Prepared By
 Date Submit Date All Dates
 Total Amount
 Supplier
 Department

Item/Product Information
 Catalog Number(SKU)
 Product Description
 Commodity Code
 Form Name
 Form Type
 Product Flags
 Controlled substance Energy Star
 Green Hazardous material
 Rad Minor Radioactive
 Recycled Select Agent
 Toxin

Contract Information
 Contract Number

Purchase Order Identification
 Purchase Order Number(s)

Workflow
 Current Workflow Step

Workflow Status
 Completed Pending
 Rejected Withdrawn

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](#)

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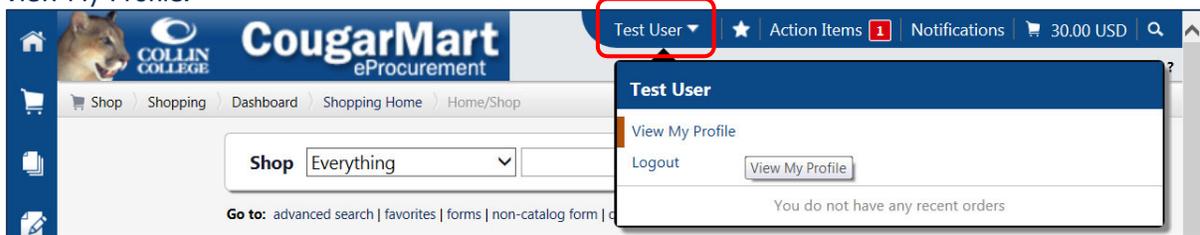
Breadcrumbs, indicated by the down pointing triangle in the screen navigation, allow a user to more quickly navigate to other parts of the menu.



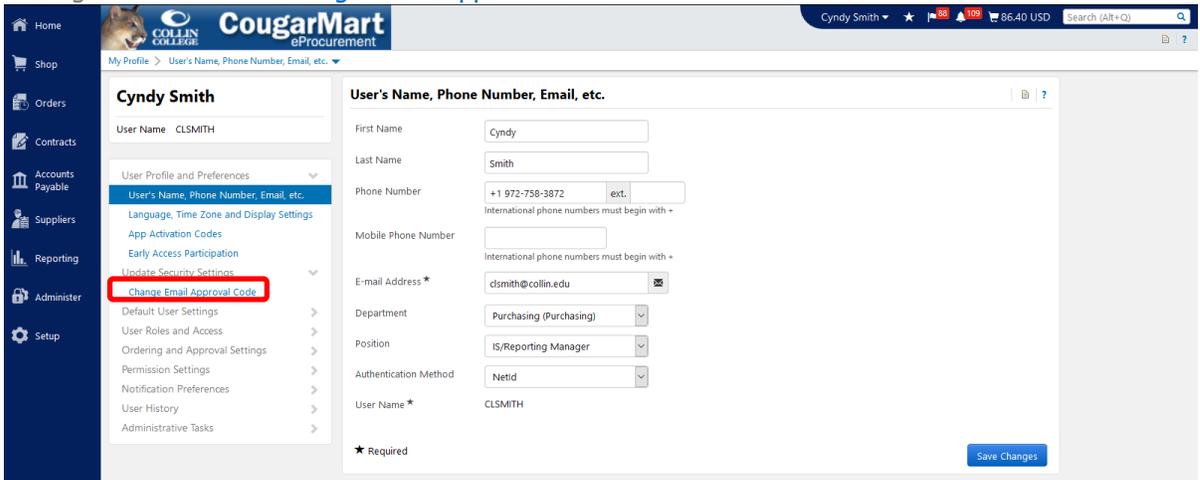
Approvals via Mobile Devices

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**.

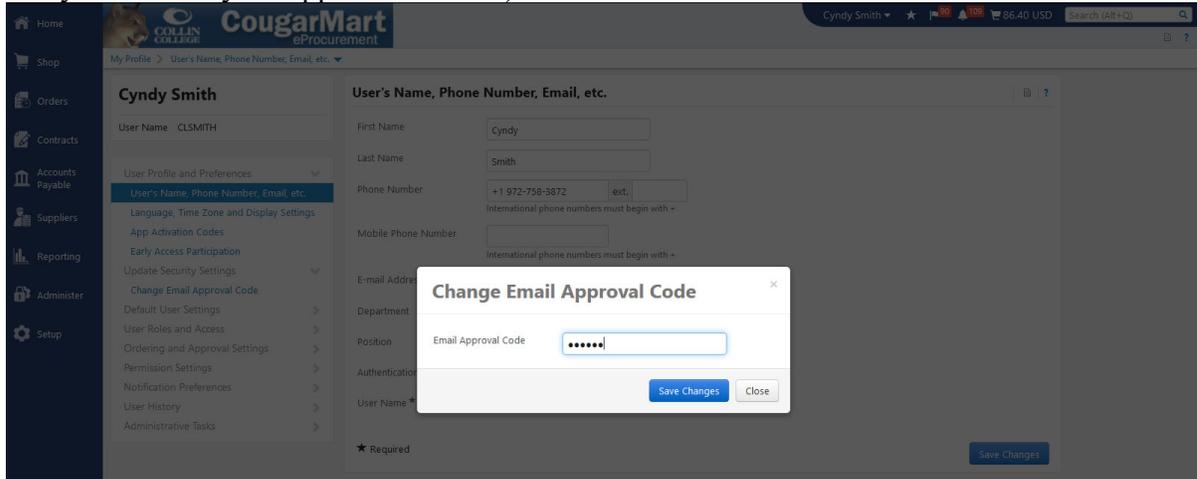


3. Your profile will open to User Profile and Preferences. Left mouse click on **Update Security Settings** to access the **Change Email Approval Code**.



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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.)



5. Left mouse click on the Save Changes button.

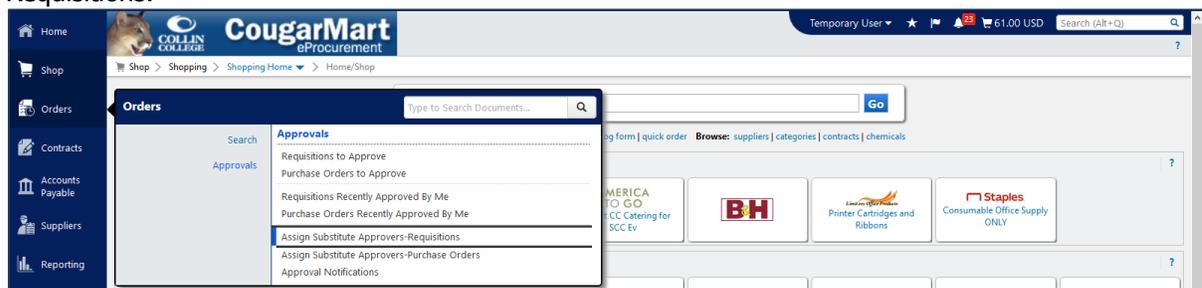
When you receive an e-mail, you will see details of the requisition and be able to approve from the eMail.

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.

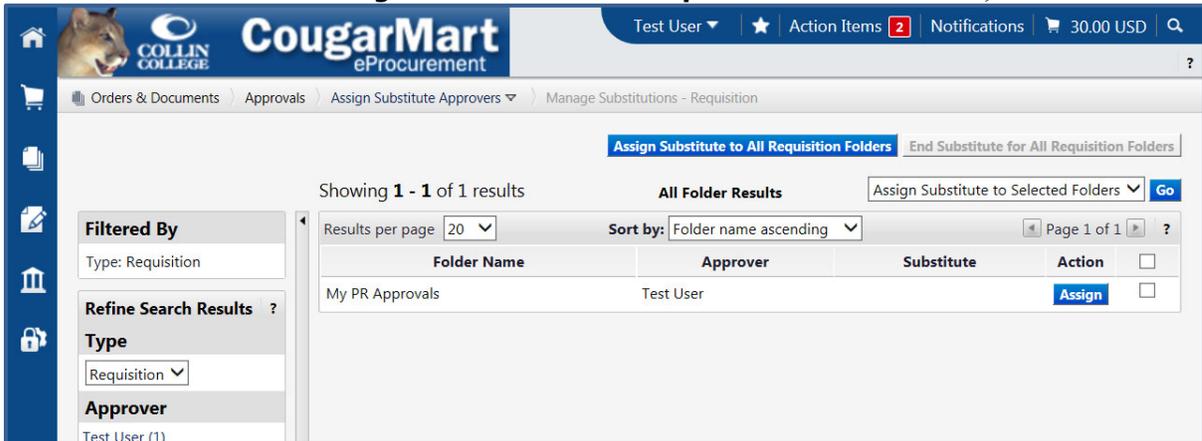
Assigning a Substitute to Approval Folders

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

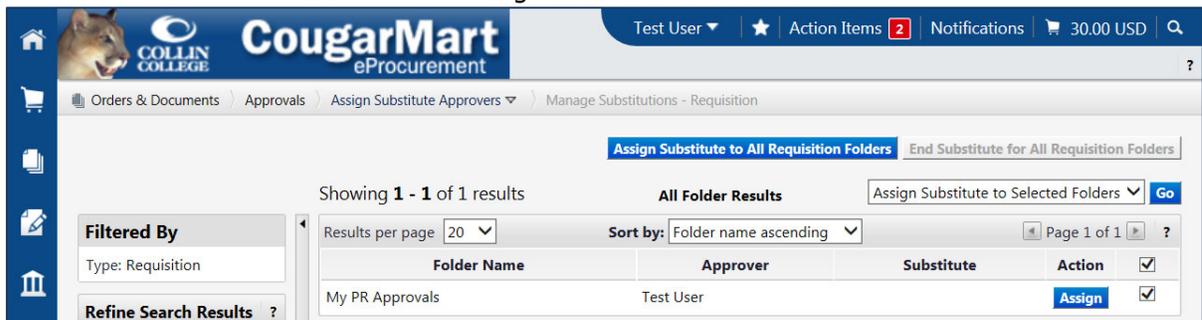
1. Go to the Orders slide out menu and choose **Approvals** then Assign Substitute Approvers-Requisitions.



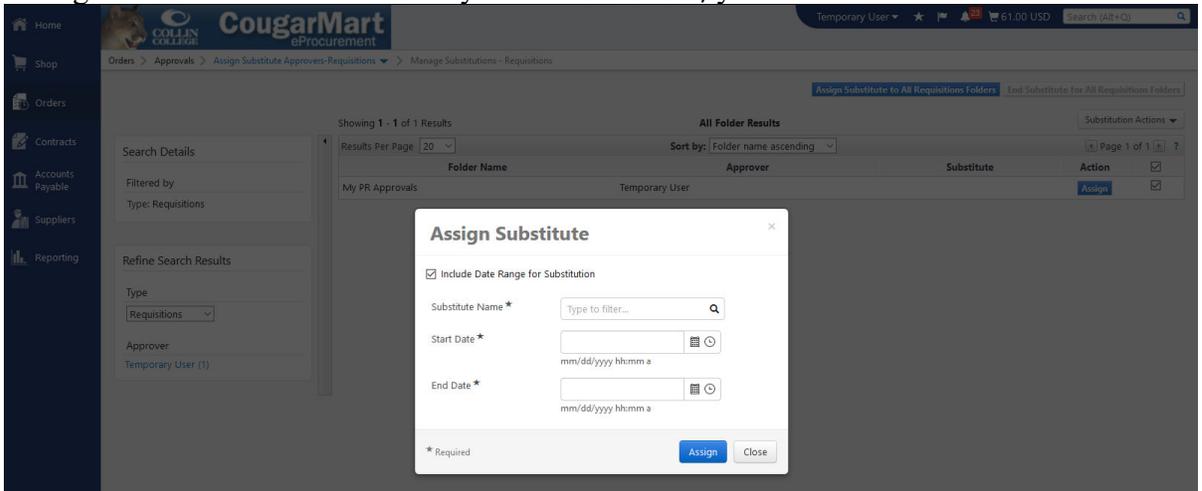
- Left mouse click on the **Assign Substitute to All Requisition Folders** button, or



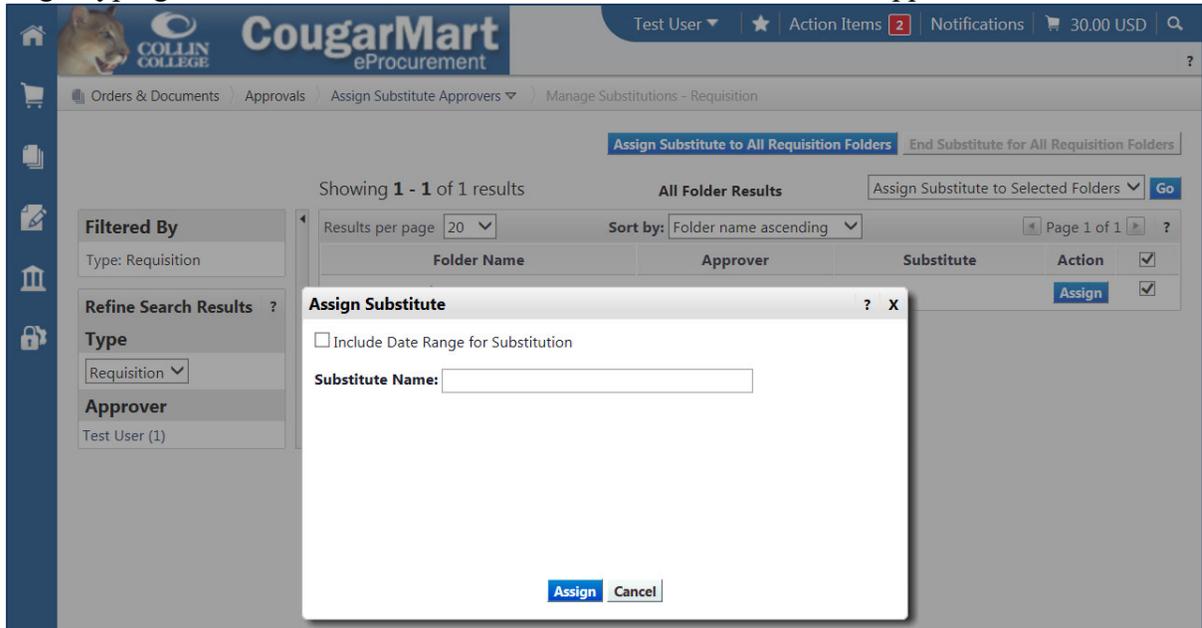
left mouse click on the checkbox beside the folders that you want to individually assign and left mouse click on the **Go** button to Assign Substitute to Selected Folders.



- 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.



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

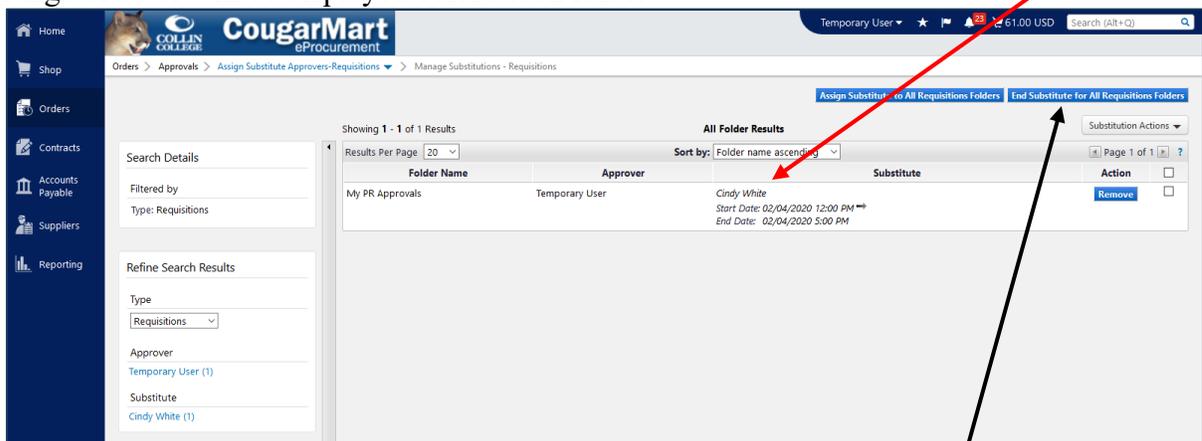


- Left mouse click on the **Assign** button.

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**.

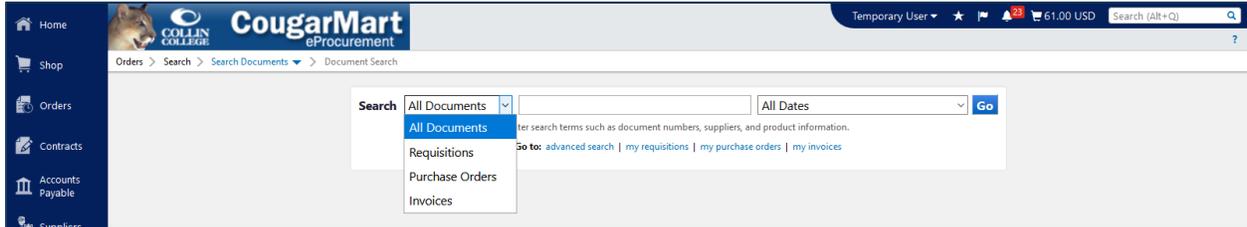
- The **End Substitute for All Requisition Folders** button will be visible. The **Substitute** and range of dates will be displayed beside each folder.



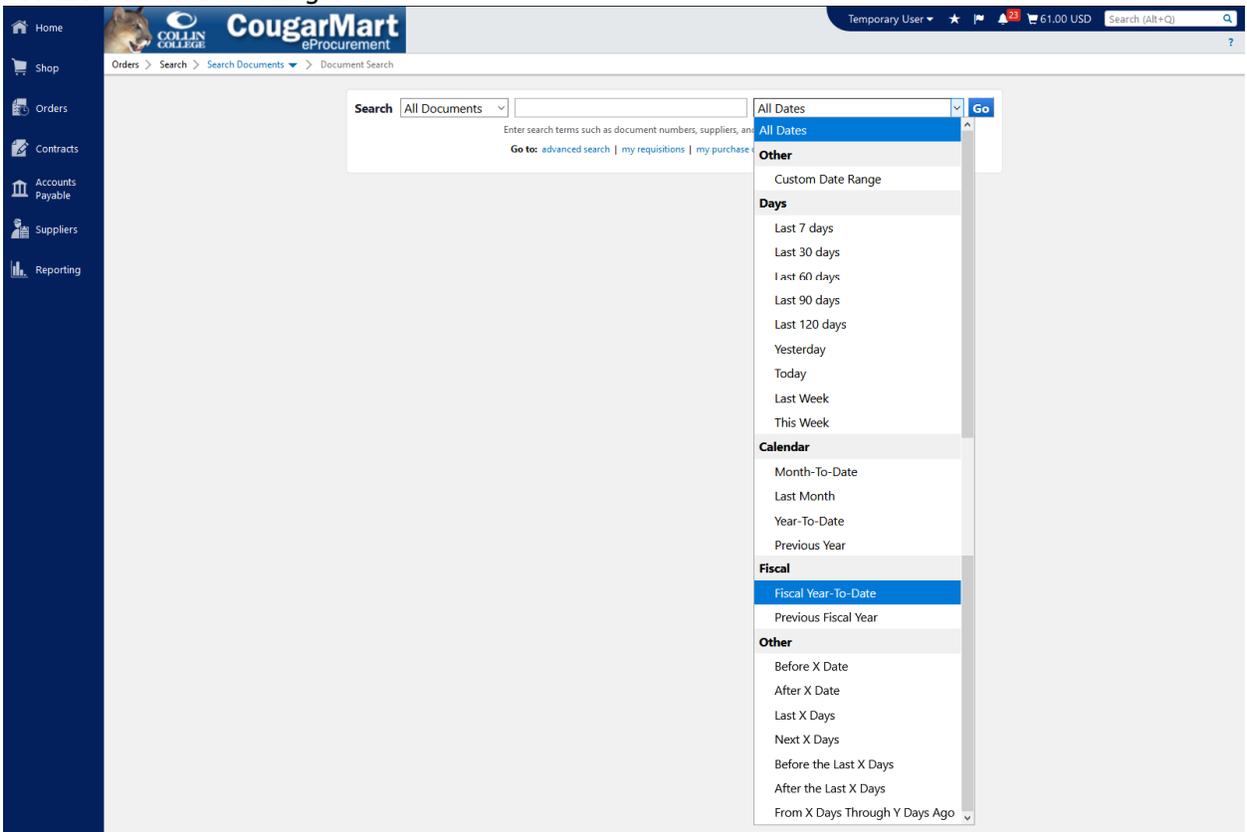
- If you did set a date range, the substitution will automatically end. If you did not set a date range upon your return, you will need to left mouse click on the **End Substitute for All Requisition Folders** button to return approvals to yourself.

Document Search

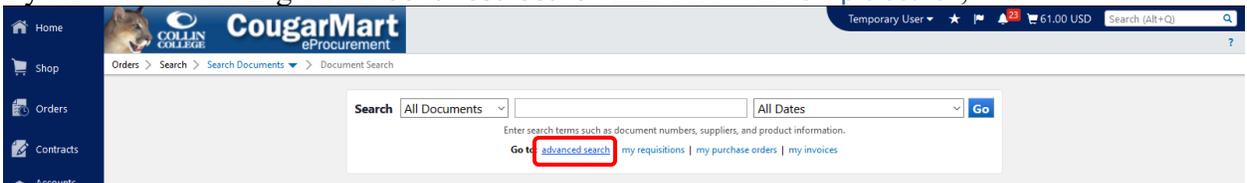
The simple document search is similar to the simple product search from the **CougarMart Home** page. If you leave the search on All Documents you will get both purchase orders and requisitions. You can use the drop down to change from searching All Documents to search for either Requisitions or Purchase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



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.

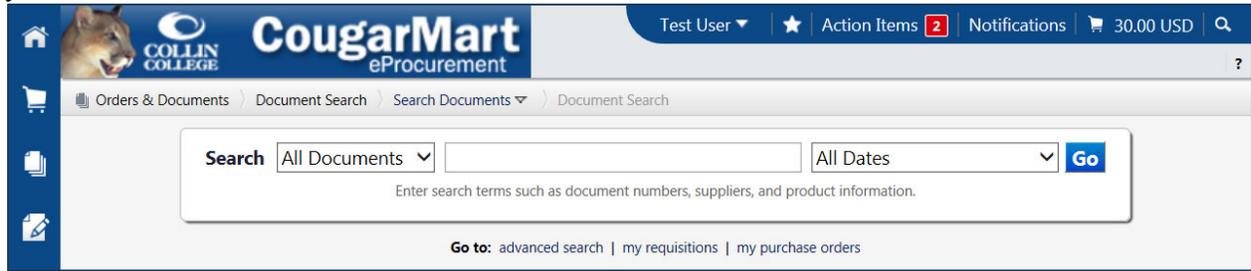


By left mouse clicking on the advanced search link below the simple search,

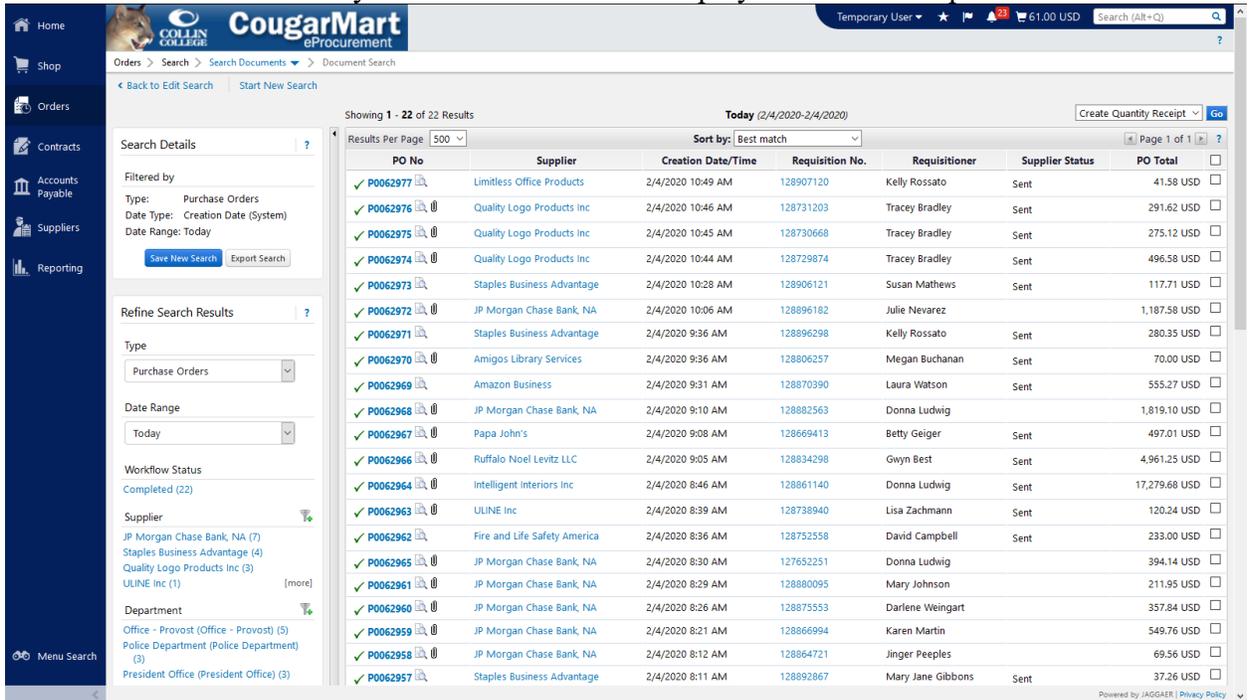


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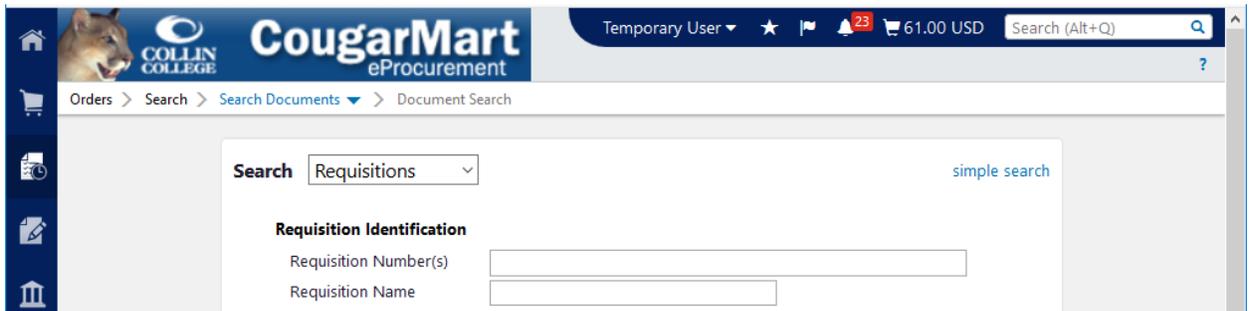
you can enter other search criteria.



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.



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.




















Requisition Information

Participant(s) Any Me Pick...

Prepared For

Prepared By

Date

Total Amount

Supplier

Department

Item/Product Information

Catalog Number(SKU)

Product Description

Commodity Code

Form Name

Form Type

Product Flags

<input type="checkbox"/> Controlled substance	<input type="checkbox"/> Energy Star
<input type="checkbox"/> Green	<input type="checkbox"/> Hazardous material
<input type="checkbox"/> Rad Minor	<input type="checkbox"/> Radioactive
<input type="checkbox"/> Recycled	<input type="checkbox"/> Select Agent
<input type="checkbox"/> Toxin	

Contract Information

Contract Number

Purchase Order Identification

Purchase Order Number(s)

Workflow

Current Workflow Step

Workflow Status

Completed Pending

Rejected Withdrawn

Status Flags

With Rejected Lines With Withdrawn Lines

With Errors With Attachments

With Trade-In Items With Receipt Based Invoice

With Credit Card

Custom Fields

Account	<input type="text" value="Is Exactly"/>	<input style="width: 90%;" type="text"/>	Add another Account
		Select from all values...	
Delivery Location	<input type="text" value="Is Exactly"/>	<input style="width: 90%;" type="text"/>	Add another Delivery Location
		Select from all values...	
Description	<input type="text" value="Is Exactly"/>	<input style="width: 90%;" type="text"/>	Add another Description
Index	<input type="text" value="Is Exactly"/>	<input style="width: 90%;" type="text"/>	Add another Index
		Select from all values...	
Location	<input type="text" value="Is Exactly"/>	<input style="width: 90%;" type="text"/>	Add another Location
		Select from all values...	

Go to: [simple search](#) | [my requisitions](#) | [my purchase orders](#) | [my invoices](#)

Q Search

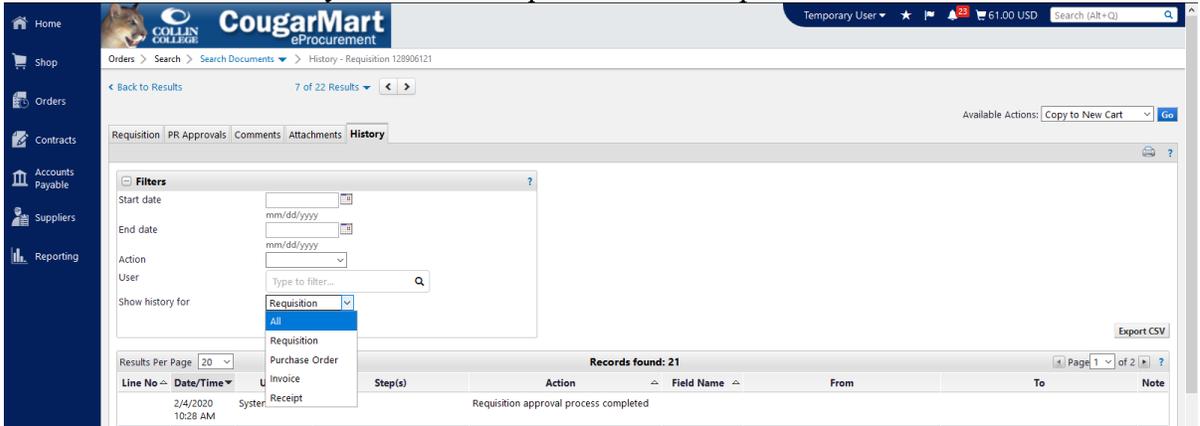
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Document Status (History)

1. 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.



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.



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

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Requested by:

ACTION(S) REQUESTED:

Banner-Purchasing-Approvals (or Requisitions) Access Request

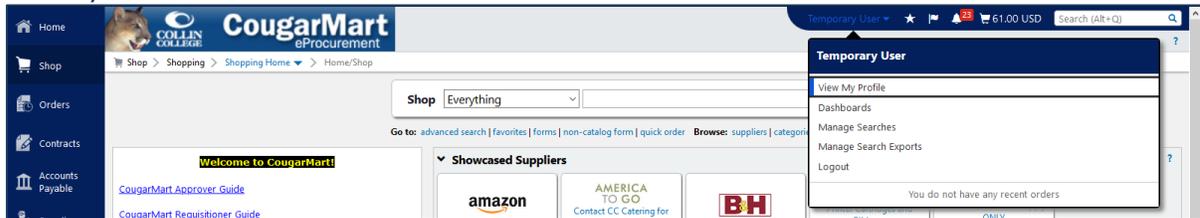
Employee email:

Employee Phone Number: {all 10 digits}

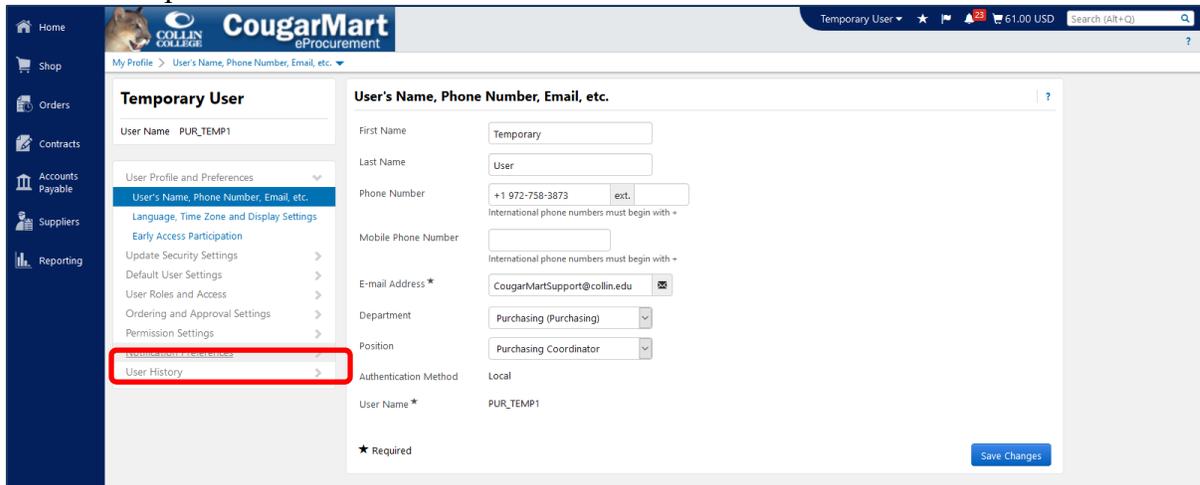
Employee is replacing:

How to Change Your eMail Notifications

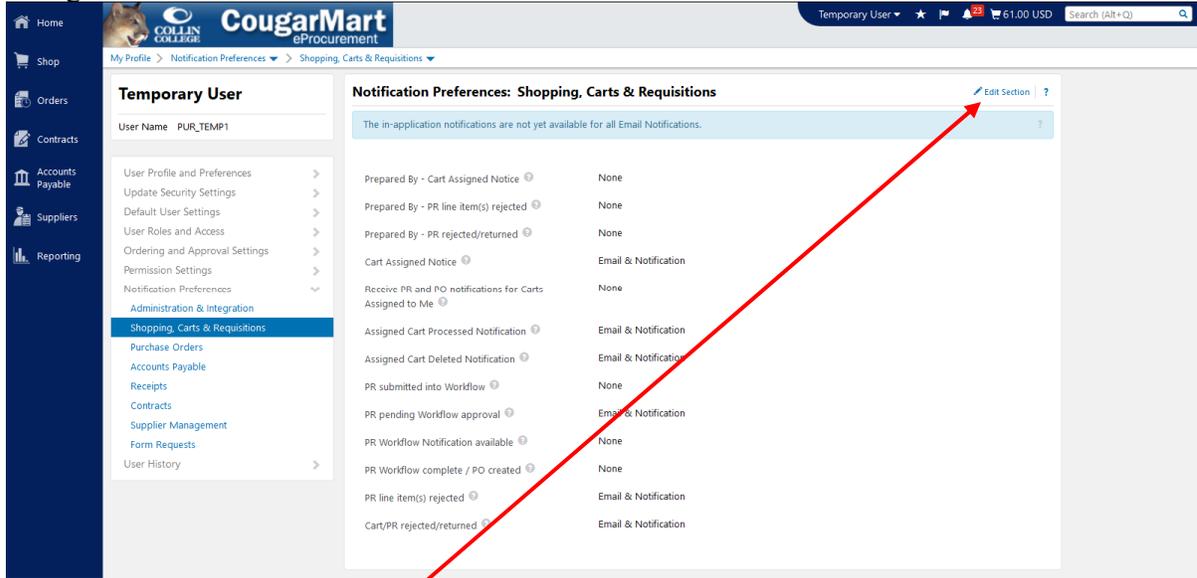
1. Go to the drop down beside your User Name at the top center of the landing page and choose View My Profile.



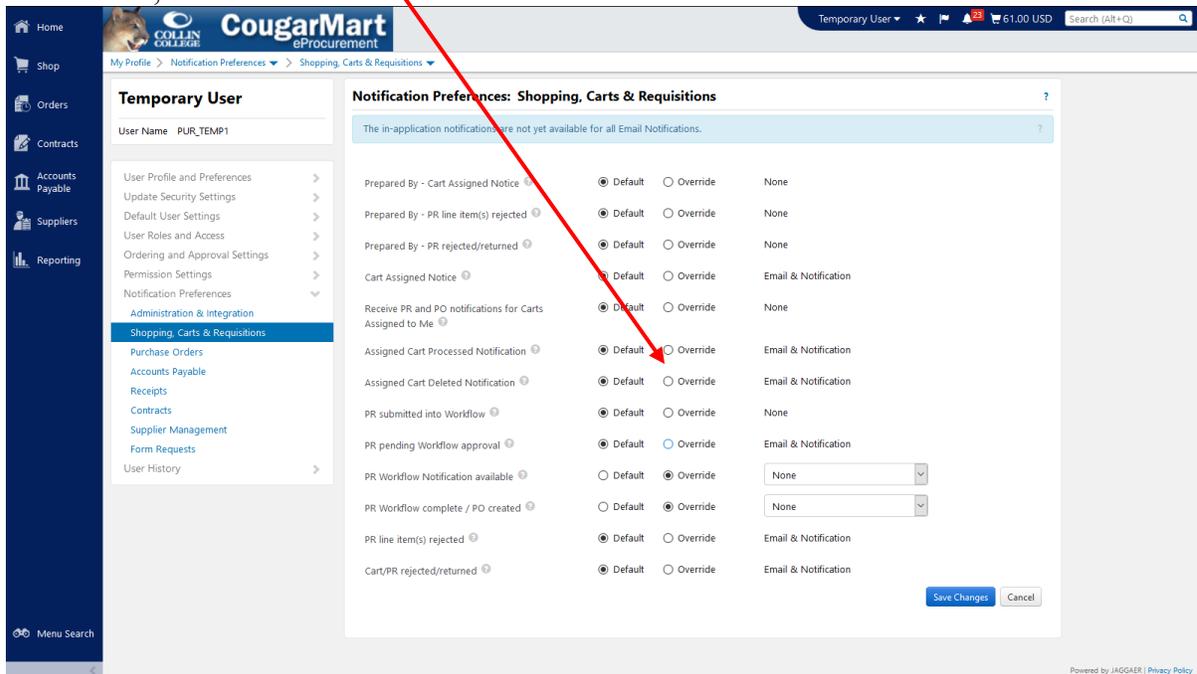
2. In the **My Profile** under User Profile and Preferences, left mouse click on the Notification Preferences option.



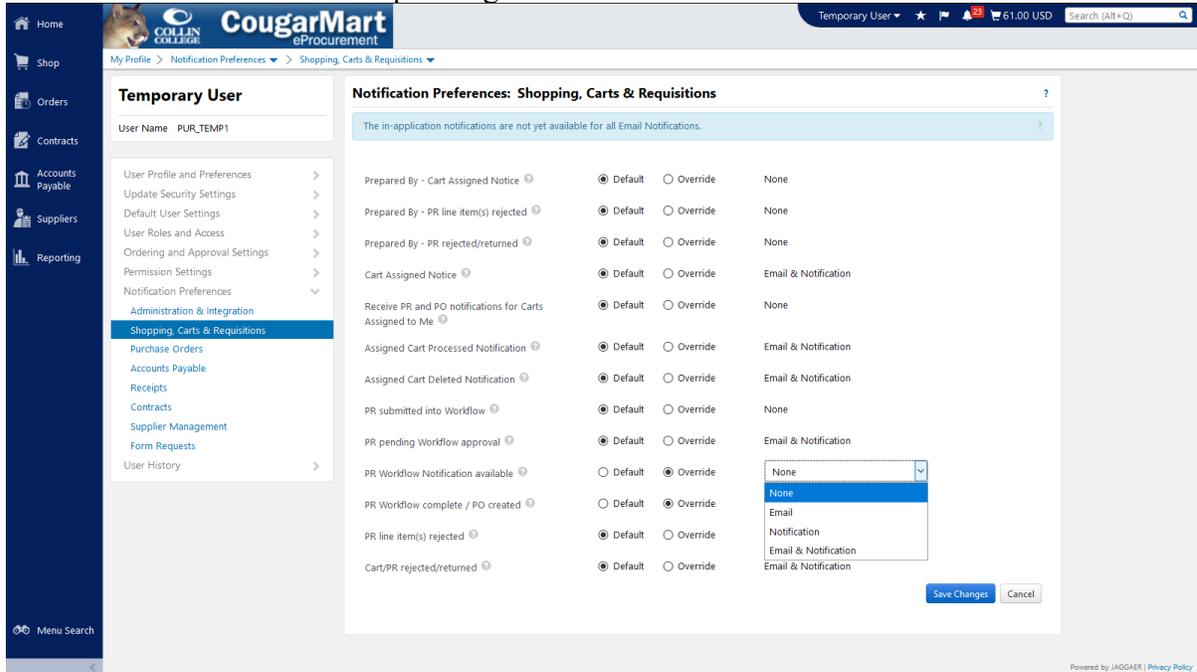
- Left mouse click on the notification, such as Shopping, Carts & Requisitions, that you want to change.



- Left mouse click on the Edit Section link in the upper right corner.
- 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.



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



- Left mouse click on the **Save Changes** button at the bottom right.

- 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.