



Collin County Community College District



Requisitioner'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. SunGard Banner will continue to be the financial system of record.

Roles in CougarMart

Requestor - Individual that will shop and place orders. These users will have to be users in Banner.

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

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

Buyer - Buyers from the Purchasing department who 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

Questions concerning CougarMart software usage, such as training and procedures, and setting up new suppliers should contact Tere Beaty, Purchasing System Specialist, TBeaty@collin.edu, 972-758-3873


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

Questions concerning new and existing forms, and new users should 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 **My Workplace** tab.

The screenshot displays the CougarWeb interface for a user named Cynthia L. Smith. The top navigation bar includes tabs for Home, Library, Campus Life, Tutorial, Finance, and My Workplace. The My Workplace tab is selected, and the eProcurement channel is highlighted with a red box. The eProcurement channel lists two items: CougarMart and CougarMart Training - electronic requisitioning training. Other channels visible include Employment Details, Human Resources Links, Banner Self-Service, Banner Bookmarks, Reporting - Historical, GroupWise Web Access, and Intranet Links.

CougarWeb 

Welcome Cynthia L. Smith
You are currently logged in.

My Account Content Layout

Groups Logout Help

December 14, 2011

My Workplace

eProcurement

- [CougarMart](#)
- [CougarMart Training - electronic requisitioning training](#)

Employment Details

- [Benefits](#)
- [Direct Deposit](#)
- [Pay Stub](#)
- [Job Details](#)
- [Leave Details](#)
- [Employee Directory](#)
- [W2 Consent](#)
- [W2 Tax and Earnings Statement](#)

Human Resources Links

- [Benefits Information](#)
- [Board Policies](#)
- [Forms & Employment Packets](#)
- [ePrint](#)
- [HR Training](#)
- [HR Website - HR Procedures, Benefits and Guidelines](#)
- [Professional Development](#)
- [CougarHR - Employment Opportunities, Job Descriptions, Evaluations, Hiring](#)
- [Procedures & Guidelines](#)

Banner Self-Service

- [Banner Self-Service](#)

Banner Bookmarks

Banner.collin.edu

- [Banner Systems \(INB/SSB for production and test\)](#)
- [Documentation](#)

Banner Production

- [Banner INB \(PROD\)](#)

Test Systems

- [Banner INB \(DANZ\)](#)

Reporting - Historical

 **Argos Reporting**

From here, you can download spreadsheets of...

GroupWise Web Access

- [View your Groupwise Webmail](#)

Intranet Links

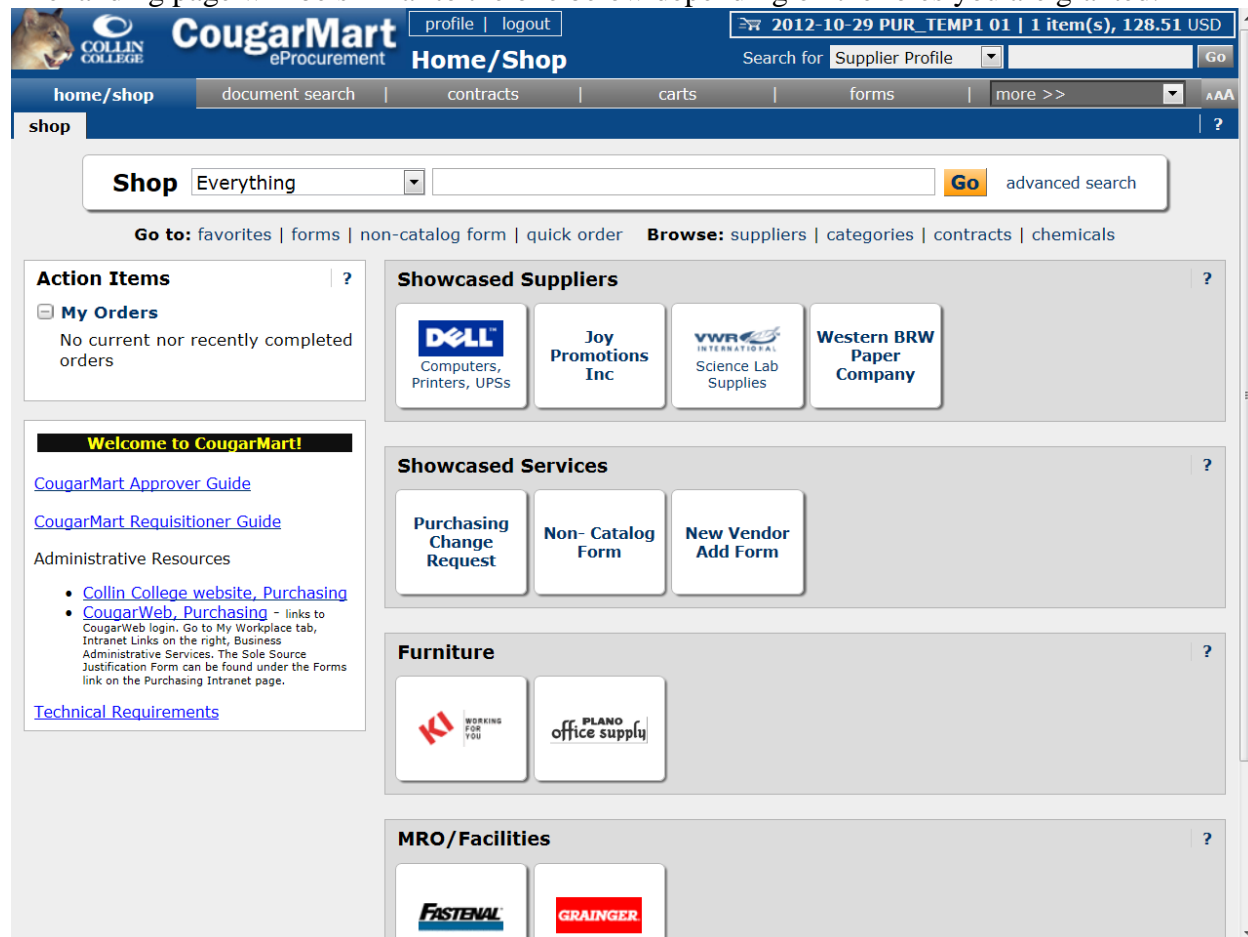
- [Emergency Response Plan](#)
- [Pandemic Response Plan](#)
- [CougarAlert Emergency System](#)
- [Refer information of concern \(SOBI\)](#)
- [Student Incident Report](#)
- [Academy for Collegiate Excellence \(ACE\)](#)
- [Advisory Committee Handbook](#)
- [Faculty Handbook](#)
- [All College Council](#)
- [Argos Report Forms and Status](#)
- [Calendars, Master and Academic](#)
- [Committees, Task Forces & Activities](#)
- [Bookstore](#)
- [Internal Auditor **](#)
- [Business Administrative Services](#)
 - [Budget Development](#)
 - [Purchasing](#)
- [Counseling Services: Online Screening](#)

Enter your Novell/Banner/CougarMart User Name and your assigned Password. Your User Name will be case sensitive and is all caps. You may either use Microsoft Internet Explorer or Mozilla Firefox. The eProcurement application has been tested for both browsers.



The image shows the login page for Collin County Community College's eProcurement system. At the top is a banner image with a collage of people in professional and medical settings. Below the banner, the text "Collin County Community College" is centered. Underneath, the heading "SIGN IN" is followed by instructions: "Please enter the login credentials in the fields below to sign in to the application. Password is case-sensitive." There are two input fields: "User Name" and "Password", both preceded by a series of asterisks. A "Forgot your Password?" link is located below the password field. A yellow "SIGN IN" button is at the bottom right of the form area.

The landing page will be similar to the one below depending on the roles you are granted.



The image displays the "Home/Shop" landing page of the CougarMart eProcurement system. The top navigation bar includes the Collin College logo, the "CougarMart eProcurement" title, and links for "profile" and "logout". A status bar on the right shows the date "2012-10-29", a purchase order reference "PUR_TEMP1 01", and a total value of "1 item(s), 128.51 USD". Below this is a search bar with "Supplier Profile" selected and a "Go" button. A secondary navigation bar lists "home/shop", "document search", "contracts", "carts", "forms", and "more >>". The main content area is divided into several sections: "Shop" with a dropdown menu set to "Everything" and a "Go" button; "Go to:" links for favorites, forms, non-catalog form, and quick order; "Browse:" links for suppliers, categories, contracts, and chemicals; "Action Items" showing "My Orders" with a note that there are no current or recently completed orders; "Welcome to CougarMart!" with links to the Approver and Requisitioner guides and administrative resources; "Showcased Suppliers" featuring logos for Dell, Joy Promotions Inc, VWR International, and Western BRW Paper Company; "Showcased Services" with links for Purchasing Change Request, Non-Catalog Form, and New Vendor Add Form; "Furniture" with logos for KI and Plano Office Supply; and "MRO/Facilities" with logos for Fastenal and Grainger.

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 navigation tabs. The home/shop tab provides access to search for goods and services from contracts and **Showcased Suppliers**. The **Action Items** menu on the left will display your most recent Requisitions divided into categories such as Returned, Pending, and Recently Completed. Below the **Action Items** is a message board. The message board displays Welcome to CougarMart! followed by hyperlinks to the CougarMart Approver and Requisitioner Guides, Administrative Resources (Collin College website, Purchasing and CougarWeb, Purchasing), and the Technical Requirements to run the application.

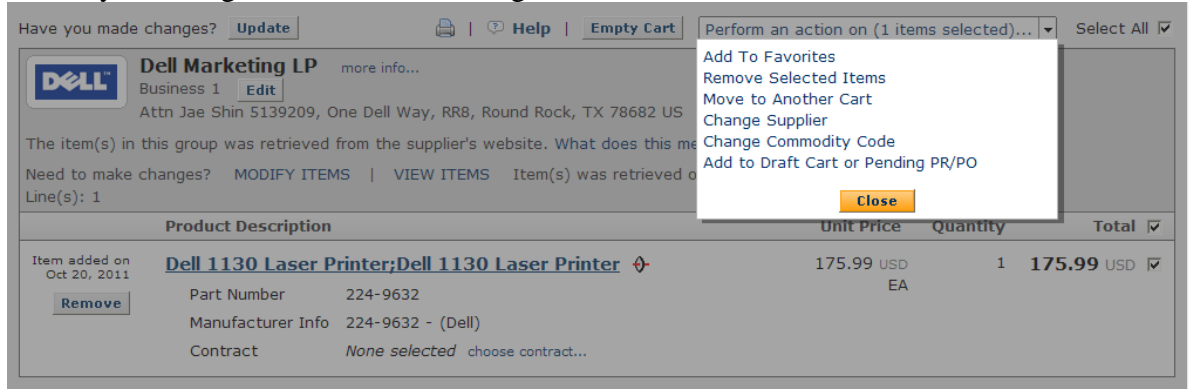
Finding Carts/Requisitions

The carts tab will provide you access to your active cart, draft carts, assigned carts, and my requisitions. The active cart is your current in progress request. Unless you start another cart, all items that you choose to add to a cart will be sent to this cart. If you wish to continue an existing cart, go to the draft carts tab and select the cart you wish to work with by clicking on the cart name. If you wish to create a new cart, click on the Create Cart button.

The screenshot shows the CougarMart eProcurement interface. At the top, there is a header with the CougarMart logo, a user profile link, a logout button, and a search bar. Below the header is a navigation bar with tabs for home/shop, document search, contracts, carts, forms, and more. The 'carts' tab is selected. Below the navigation bar is a 'Create Cart' button. The main content area is titled 'My Drafts' and contains a table with columns: Active Cart, Cart Number, Shopping Cart Name, Date Created, Cart Description, Total, and Delete. The table lists five draft carts.

Active Cart	Cart Number	Shopping Cart Name	Date Created	Cart Description	Total	Delete
	32463592	2012-08-21 PUR_TEMP1 01	8/21/2012	Punch-out Item	98.47 USD	Delete
	32477551	2012-08-21 PUR_TEMP1 02	8/21/2012	Search for Contract Item	15.56 USD	Delete
	32487212	2012-08-21 PUR_TEMP1 03	8/21/2012	Non-catalog Item	50.00 USD	Delete
	32511390	2012-08-22 PUR_TEMP1 01	8/22/2012	Test Supplier with Multiple Contracts	228.39 USD	Delete
	34332251	2012-10-29 PUR_TEMP1 01	10/29/2012		128.51 USD	Delete

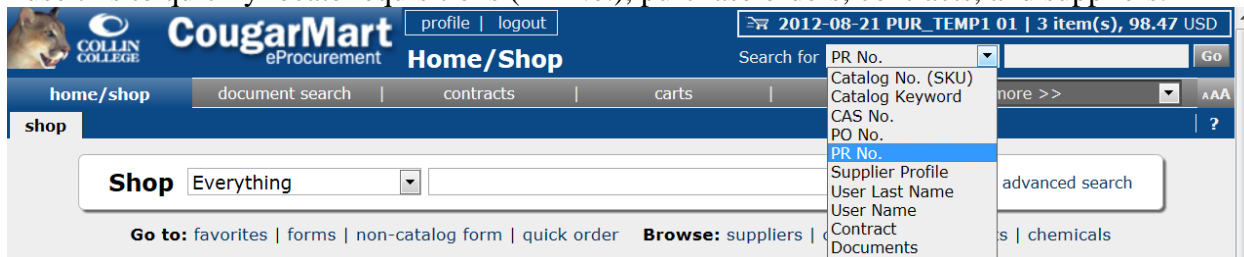
If you decide that you want to take a different action on some of the items in your cart, you can do so by selecting the item and choosing the action.



Quick Search

In the upper right hand side of CougarMart, right below the active cart, is a Search for drop-down, a field box, and a Go button.

I use this to quickly locate requisitions (PR No.), purchase orders, contracts, and suppliers.



Requisition Overview

A requisition is composed of two distinct sections: header and line level. The header section contains **General, Shipping, Billing, Accounting Codes, Internal Notes and Attachments, External Notes and Attachments, and Terms and Conditions**. The **Supplier/Line Items Details** section contains the supplier and the line items being ordered. The preferred use of **Internal Notes and Attachments, External Notes and Attachments, and Terms and Conditions** is at the header level. **Accounting Codes** can be entered at the header level for all line items, or in combination at the line level for specific items.

Entering a Requisition

1. Login to CougarMart.
2. Enter the name of the item you want to search for, and left mouse click the **Go** button or hit the Enter key. This search will locate contracted items, or you can use the [non-catalog form](#) to enter items not on contract. The search may also locate items from showcased suppliers, such as Dell, Fastenal, Grainger, Joy Promotions, KI, Plano Office Supply (furniture only), VWR, Western BRW Paper. This will be indicated by **Order from Supplier** hyperlink. It is a best practice that you add these items to a separate cart. Showcased suppliers' websites are accessed by left mouse clicking on their icon and following their instructions to return items to your CougarMart cart. (See [page 76](#) for instructions on using Dell E-Quotes Orders thru the Punch-out.)

NOTE: Not all contracted items will be available at the time of GoLive. Loading contracted items will be an ongoing process.

The screenshot displays the CougarMart eProcurement interface. At the top, the header includes the Collin College logo, the text 'CougarMart eProcurement', and navigation links for 'profile' and 'logout'. A shopping cart icon shows '2012-08-21 PUR_TEMP1 01 | 3 item(s), 98.47 USD'. Below the header is a navigation bar with links: 'home/shop', 'document search', 'contracts', 'carts', 'forms', and 'more >>'. The main content area features a search bar with 'Everything' selected and 'Syringe' entered. A red oval highlights the search bar and the 'Go' button. A red arrow points from the text 'left mouse click the Go button' in the instructions to the 'Go' button. Another red arrow points from the text 'non-catalog form' in the instructions to the 'non-catalog form' link in the 'Go to:' section. The 'Go to:' section also includes links for 'favorites', 'forms', 'quick order', and 'Browse: suppliers | categories | contracts | chemicals'. The left sidebar contains 'Action Items' with a 'My Orders' section showing 'No current nor recently completed orders', and a 'Welcome to CougarMart!' section with links to 'CougarMart Approver Guide', 'CougarMart Requisitioner Guide', and 'Technical Requirements'. The main content area also features 'Showcased Suppliers' (Dell, Joy Promotions Inc, VWR International, Western BRW Paper Company), 'Showcased Services' (Purchasing Change Request, Non-Catalog Form, New Vendor Add Form), 'Furniture' (KI, Plano Office Supply), and 'MRO/Facilities' (Fastenal, Grainger).

- When you want to add a contract item to your cart, left mouse click on the **Add to Cart** button. You will be able to see the active cart name in the upper right of corner of your screen. Items can be from multiple suppliers, but all items will be sent thru the same approval path. It is suggested that technology items be entered in a separate cart due to the additional approver. There is a limit of 1000 items. While you can set a delivery address on a per item basis from the Shipping tab, it is best practice to create separate carts for different ship to addresses.

CougarMart eProcurement [profile](#) [logout](#) **2012-08-21 PUR_TEMP1 02 | 1 item(s), 15.56 USD**

Product Search - All Search for PR No.

[home/shop](#) | [document search](#) | [contracts](#) | [carts](#) | [forms](#) | [more >>](#) [AAA](#)

Shop Everything syringe [advanced search](#)

Go to: favorites | forms | non-catalog form | quick order **Browse:** suppliers | categories | contracts | chemicals

Results for: Everything : Smartpractice + syringe Showing **1 - 3** of 3 results [Compare Selected: 0](#)

Add Keywords

Filter Results

By Supplier

Results per page: 200 **Sort by:** Best Match Page 1 of 1

Syringe, 12cc, curved, disposable, 50/pkg from Smartpractice **15.56 USD**

Part Number V316600
Contract Number 3406-2 [more info...](#)

Annual Contract for Dental Hygiene Supplies, Mater... **1** **Add to Cart** [add favorite](#) | [compare](#)

- Left mouse click on the **Continue Shopping** link located in the top center of your cart to select more items for this request. You will be returned to the **shop** tab. You can either search for more contract items or use the [non-catalog form](#) to enter items.

CougarMart eProcurement [profile](#) [logout](#) **2012-08-21 PUR_TEMP1 02 | 1 item(s), 15.56 USD**

Cart - 32477551 - Draft Requisition Search for PR No.

[home/shop](#) | [document search](#) | [contracts](#) | [carts](#) | [forms](#) | [more >>](#) [AAA](#)

active cart | [draft carts](#) | [favorites](#) | [my requisitions](#)

Shopping Cart for PUR_TEMP1

Name this cart: 2012-08-21 PUR_TEMP1 02

Continue Shopping

1 Item(s) for a total of **15.56 USD**
subtotal: 15.56 USD
estimated tax, shipping & handling: 0.00 USD

or

Have you made changes? Perform an action on (0 items selected)...

Smartpractice [more info...](#)

	Product Description	Unit Price	Quantity	Total
Item added on Aug 21, 2012	Syringe, 12cc, curved, disposable, 50/pkg	15.56 USD	1	15.56 USD
<input type="button" value="Add to Favorites"/>	Part Number V316600	PK	<input type="button" value="Update"/>	
<input type="button" value="Remove"/>	Contract 3406-1 more info...			
<input type="button" value="More Actions"/>	Annual Contract for Dental Hygiene Supplies, Mater...			

5. When using the **Non-Catalog Form**, you will be required to enter or select a supplier. (See Appendix 1 on page 75 for further information on entering a Printing job.)

6. The **Catalog No.** is a required field. If you do not have a part number you can enter N/A.
7. Enter a complete **Product Description**. The **Product Description** should include the manufacturer's name, manufacturer's part number, a layman's product description, a model number, supplier name, and supplier part number. Anyone should be able to understand what is being ordered. If maintenance/rental is being renewed, there should be separate line items with serial numbers in the description.
- NOTES: Please aware that only the first 50 characters will feed into Banner. The **Catalog No.** field will feed over into the Description field first followed by the **Product Description**. The first line of the **Product Description** should be concise to assist Inventory Control, and should be followed by a full description for viewing in CougarMart and for the purchase order to the supplier.
- There is now a Notes field that follows the **Product Description** field. You can add up to 1000 additional characters for a fuller description.
8. Enter a **Quantity**.
9. Select the Packaging (UOM) (Unit of Measure).
10. Enter the **Estimated Price Each** (Unit Cost).
11. Enter the Manufacturer Name if available.

12. Enter the Manufacturer Part No. if available.

13. If you have other items to order from this supplier, choose Add to Cart and Return from the Available Actions in the top right corner of the page then left mouse click on the **Go** button. If you are done with entering items for this supplier, choose Add and go to Cart then left mouse click on **Go**.

https://solutions.sciquest.com/?formId=64808194&tmstmp=1345573692365 - Non-Catalog Form - Windows Internet Expl...

Non-Catalog Form Available Actions: Add and go to Cart Go Close

Supplier Info ?

Enter Supplier or supplier search

General Info ?

Catalog No.

The first line of the Product Description should be concise to assist Inventory Control. A maximum of 50 characters is fed into Banner. A more complete Product Description can be entered in the Notes field below that will be displayed in CougarMart. Quotes can be attached as either an Internal or External Notes and Attachment.

Product Description 254 characters remaining expand | clear

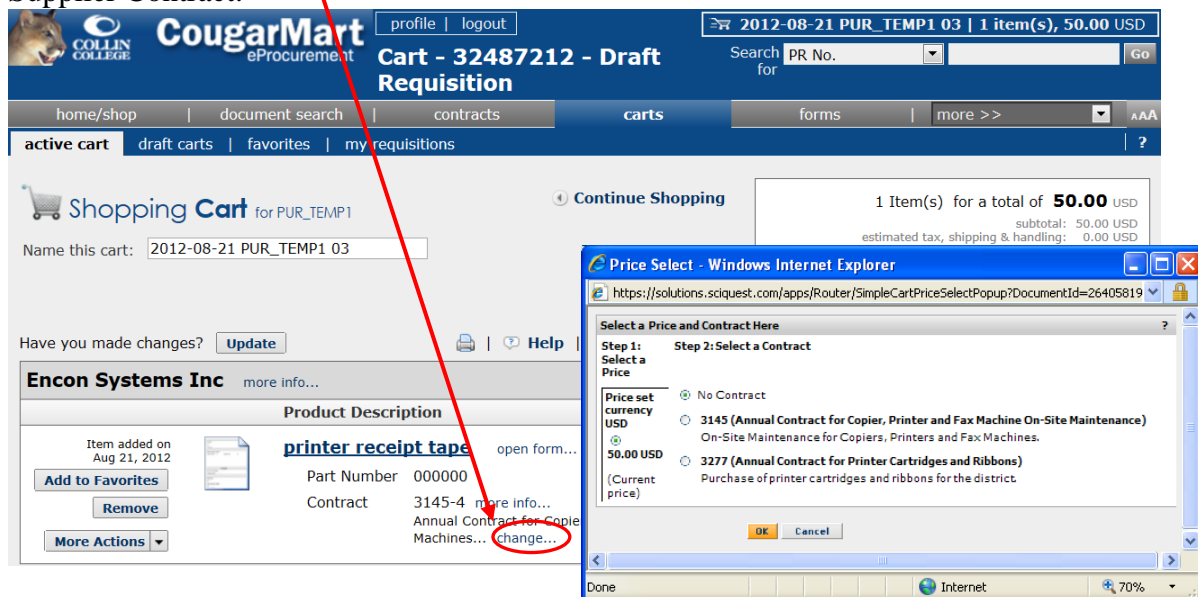
Notes 1000 characters remaining expand | clear

Quantity

Packaging (UOM) EA - Each

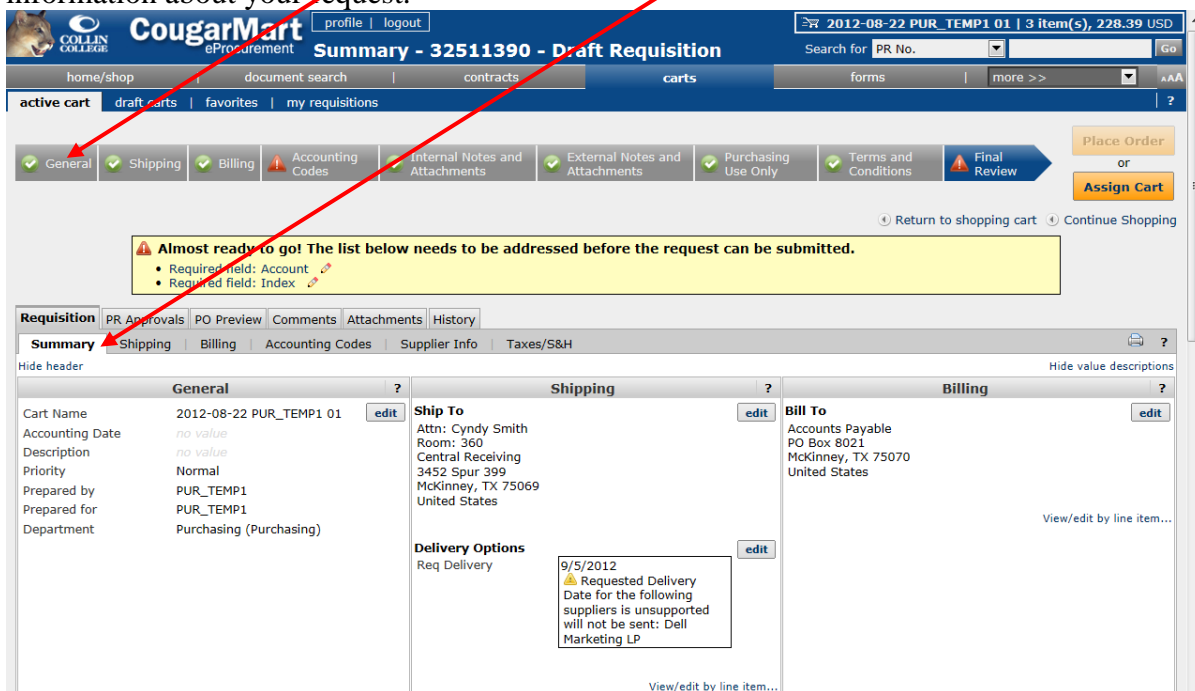
Unit Cost

NOTE: If you are purchasing a non-catalog item from a supplier that we have a contract for, be sure to click on the [change...](#) link listed with the item contract, choose the No Contract radio button, and click the **OK** button. See [page 22](#) for more information on Selecting a Supplier Contract.



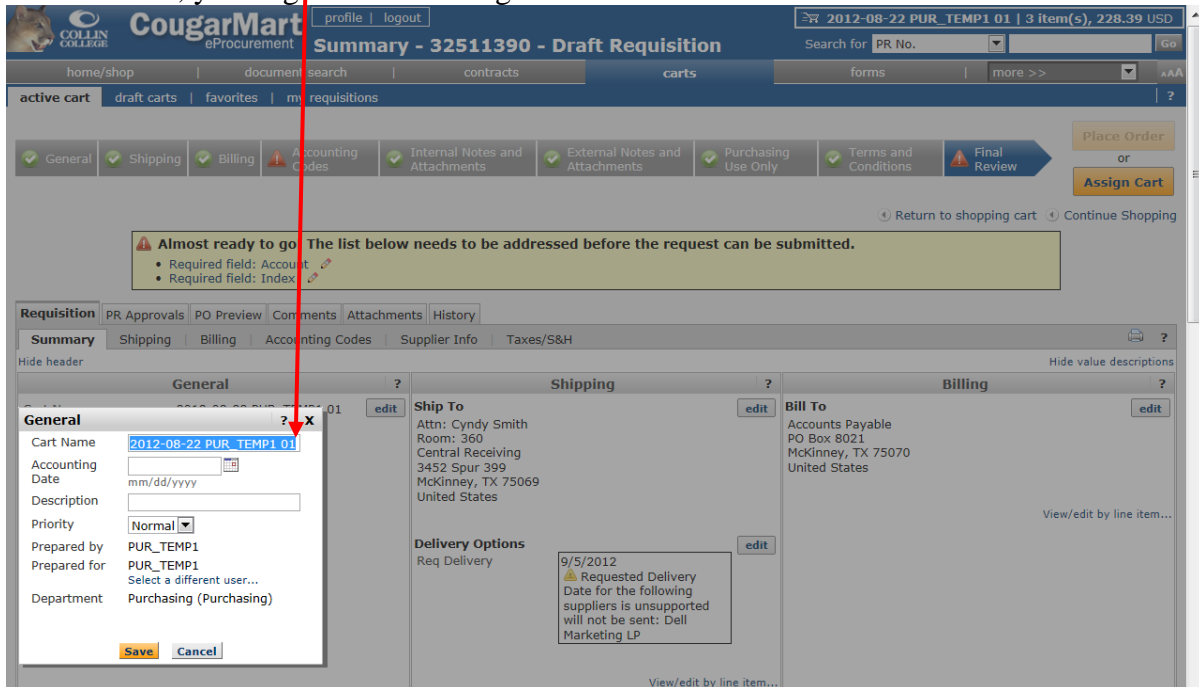
14. When you have chosen or entered all of your items, click on the **Proceed to Checkout** button in the upper right hand side of the screen. This will take you from the Cart – Draft Requisition to the Summary – Draft Requisition.

15. Left mouse click on the General hyperlink or the **Summary** tab to enter additional information about your request.



16. To make changes in the **General** section, choose the **edit** button.

17. You can edit the **Cart Name** if you choose. The cart is named based on the date, your user name, and assigned a cart number for that date. There is a 100 character limit. The cart name will not change once started. If you have saved your cart and want to come back to it at a later date, you might want to change the date in the cart name.



The screenshot displays the CougarMart eProcurement interface for a 'Draft Requisition' (Summary - 32511390). The top navigation bar includes links for 'home/shop', 'document search', 'contracts', 'carts', 'forms', and 'more >>'. A status bar at the top right shows '2012-08-22 PUR_TEMP1 01 | 3 item(s), 228.39 USD'. Below the navigation bar, a progress bar indicates the status of various sections: General, Shipping, Billing, Accounting Codes, Internal Notes and Attachments, External Notes and Attachments, Purchasing Use Only, Terms and Conditions, and Final Review. A warning message states: 'Almost ready to go! The list below needs to be addressed before the request can be submitted.' Below this, a list of required fields is shown: 'Required field: Accounting Codes' and 'Required field: Index'. The main content area is divided into sections: 'Requisition' (with sub-tabs for Summary, Shipping, Billing, Accounting Codes, Supplier Info, Taxes/S&H), 'General', 'Shipping', and 'Billing'. The 'General' section is currently active, and a modal window is open for editing it. The modal window contains the following fields: 'Cart Name' (with a red box around it), 'Accounting Date' (with a calendar icon), 'Description', 'Priority' (set to Normal), 'Prepared by' (set to PUR_TEMP1), 'Prepared for' (set to PUR_TEMP1), and 'Department' (set to Purchasing (Purchasing)). The 'Shipping' section shows 'Ship To' information (Attn: Cyndy Smith, Room: 360, Central Receiving, 3452 Spur 399, McKinney, TX 75069, United States) and 'Delivery Options' (Req Delivery, 9/5/2012, Requested Delivery Date for the following suppliers is unsupported will not be sent: Dell Marketing LP). The 'Billing' section shows 'Bill To' information (Accounts Payable, PO Box 8021, McKinney, TX 75070, United States).

18. There is a **Description** field available within this section that can be used to enter additional information, such as fall 20YY Classroom Supplies, Open Purchase Order, or Supplemental Request Number.

NOTE: You should not put a date in the **Accounting Date** field for any orders that are not being created for the next fiscal year. Doing so may result in the failure of your orders to create a Banner PO and cause it to be returned by Purchasing staff. Only use the **Accounting Date** field for new FY orders that are being created before the new fiscal year begins.

19. This section contains a **Priority** option. The choices are a default of **Normal** and an option of **Urgent**. Selecting the **Urgent** will cause your requisition to be displayed at the top of an approver's list.

20. **Select a different user...** if you are preparing for a different person.

NOTE: You must address tabs with a red triangle for your request to proceed successfully. Explanations are given in the yellow box below.

2012-08-22 PUR_TEMP1 01 | 3 item(s), 228.39 USD

Search for PR No. [] Go

home/shop | document search | contracts | carts | forms | more >>

active cart | draft carts | favorites | my requisitions

General Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments Purchasing Use Only Terms and Conditions Final Review

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Account
- Required field: Index

21. Review shipping address by clicking on **Shipping** section or Shipping tab. HINT: You can select a different delivery address for each line item, but it will generate separate purchase orders. If you want a single purchase order to be generated for all items, such as an annual contract for all campuses security service, type the individual delivery addresses as part of the Product Descriptions.
22. Left mouse click on the **edit** button to enter or make changes. You can select from your addresses or select from org addresses by using the drop down. You can check the Save this address for future use box to save to your addresses. You will be asked to **Name this address**. You will also have the option to check this box to make this the default address in the future.

Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.

Shipping address select from your addresses

select from org addresses
CYC

Address Details

Attn: Cyndy Smith - Requestor

Room:

Address Line 1 Central Receiving, BB100

Address Line 2 4800 Preston Park Blvd

City Plano

State TX

Zip Code 75093

Country United States

☒ Save this address for future use

Name this address (e.g. Main St)
CYC

☐ Check this box to make this the default address in the future.

Save Cancel

23. Entering a Room number is required.

24. **Save** your selections.

25. To revise the pre-populated Req Delivery (Date), click on the **edit** button beside the **Delivery Options** in the **Shipping** area. You can select a date from the calendar widget or enter a date in the mm/dd/yyyy format. REMINDER: When a requisition is returned, make sure that this date is set beyond what the purchase order transaction date will be, or else the purchase order will fail.

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Req Delivery

Requisition PR Approvals PO Preview Comments Attachments History

Summary **Shipping** Billing Accounting Codes Supplier Info

Hide value descriptions

Shipping ?

These values apply to all lines unless specified by line item

Ship To edit

Shipping address Attn: Cyndy Smith - Requestor Room: 360 Central Receiving 3452 Spur 399 McKinney, TX 75069

Delivery Options ? X

Req Delivery

mm/dd/yyyy

Required field

Save Cancel

26. **Save.**

NOTE: When required elements have been addressed, the red triangle will change to a green check.

27. Use the **Accounting Codes** tab to enter or select your Index and Account for the entire order.

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing **Accounting Codes** Supplier Info

Hide value descriptions

Accounting Codes ? X

These values apply to all lines unless specified by line item

Chart	Index	Account	Location	add split
C Select from profile values... Clear selected value...	211305 Select from all values...	733120 Select from all values...		

Save Cancel

You can go to the **Accounting Codes** tab and use the **edit** button on any line item that you want to have different accounting.

following:

Proceed to the next step: Internal Notes and Attachments. Go straight to the end: Final Review.

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing **Accounting Codes** Supplier Info Taxes/S&H

Hide value descriptions

Accounting Codes ?

These values apply to all lines unless specified by line item

Chart	Index	Account	Location	edit
C Collin County Community College Dst	211305 Purchasing	733120 Office Supplies	no value	

For selected line items Add To Favorites Go

Dell Marketing LP more info...

Business 1
Attn: Jae Shin 513-9209, One Dell Way, RR8, Round Rock, TX 78682 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 mouse more info... Accounting Codes (same as header)	N/A	EA	10.00	1 EA	10.00 USD	<input type="checkbox"/>

edit

Accounting Codes ? X

Chart	Index	Account	Location	add split
C Select from profile values... Clear selected value...	211305 Select from all values...	733120 Select from all values...		

Save Cancel

Handling 0.00
Total 10.00 USD

See configuration for this requisition

HINT: The index value is similar to an Organization, but has the added advantage of automatically pulling in the fund and activity from the accounting string.

If the same Index and Account applies to all line items, you can enter the Accounting Codes at the header level.

If there are different, Indexes and/or Accounts for line items, go to the Accounting Codes tab and edit each line item accordingly.

Do not split accounting for a single line item that is a capital or controlled item. You can only do a split when there is a multiple quantity and do the split per each.

Banner does not allow the combining of fixed assets and a supply account on the same line item, such as the Plano Office Supply Z-service charge. If you are charging some of the Z-service charge to Account 787410 and some to 733110, you must do two separate line items. Requisitions of this type will be returned for correction.

Banner does accept CougarMart dollar amount and percent splits at the header level.

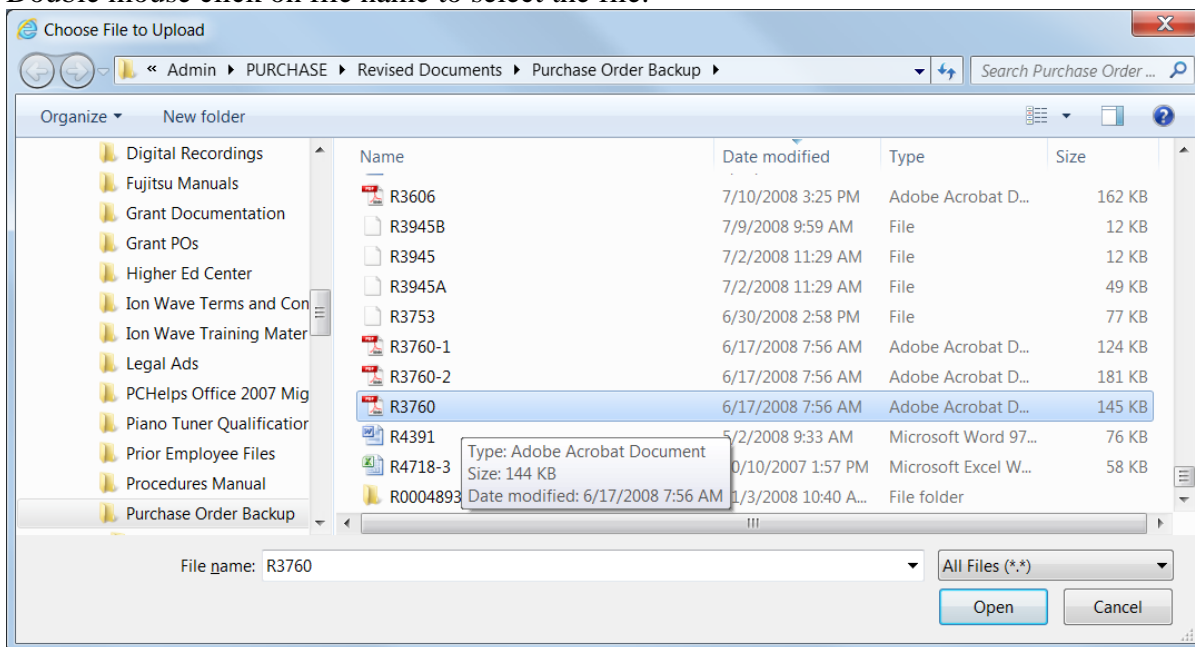
28. The **Internal Notes and Attachments** can be used to add notes or documents, such as attaching the other two high quotes that should be attached to the requisition, or a sole source. In the **Internal Notes and Attachments** section, left mouse click on the add attachment... link to begin the process of attaching all quotes obtained to satisfy thresholds.

The screenshot shows the CougarMart eProcurement interface. At the top, there's a header with the logo, navigation links (profile, logout), and a search bar. Below the header, a blue banner displays 'Internal Notes and Attachments - 32487212 - Draft Requisition'. A progress bar indicates the current step is 'Internal Notes and Attachments', with other steps like General, Shipping, Billing, Accounting Codes, External Notes and Attachments, Purchasing Use Only, Terms and Conditions, and Final Review. A yellow message box states: 'You have completed the required information in this step. At this point, you can do the following: Proceed to the next step: External Notes and Attachments. Go straight to the end: Final Review.' Below this, there are tabs for 'Requisition' (Summary, Shipping, Billing, Accounting Codes, Supplier Info, Taxes/S&H) and 'Internal Notes and Attachments'. The 'Internal Notes and Attachments' tab is active, showing a section for 'Internal Note' (no note) and 'Internal Attachments' (add attachment...). The 'add attachment...' link is highlighted with a red box.

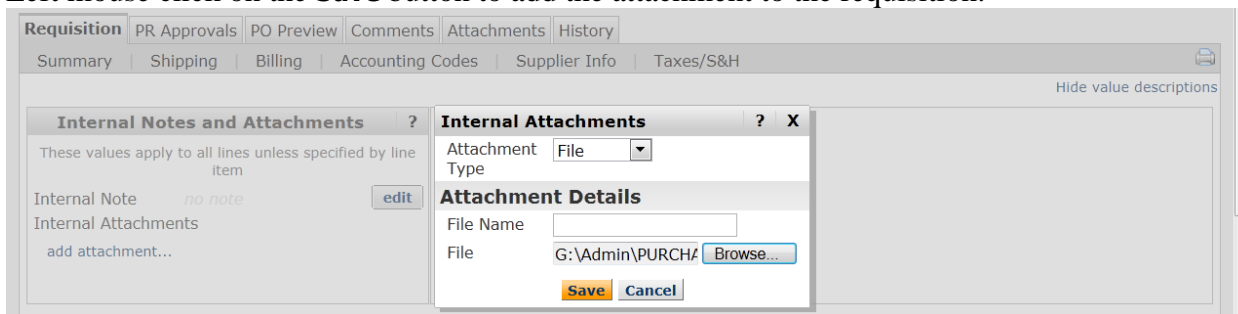
29. When the **Internal Attachments** window opens, left mouse click on the Browse... button to locate your quote file(s).

The screenshot shows the 'Internal Attachments' dialog box open over the 'Internal Notes and Attachments' section. The dialog box has a title bar with a question mark and a close button (X). It contains a dropdown menu for 'Attachment Type' set to 'File'. Below this, there's a section titled 'Attachment Details' with a 'File Name' input field and a 'File' input field with a 'Browse...' button. At the bottom of the dialog are 'Save' and 'Cancel' buttons. The background shows the same 'Internal Notes and Attachments' section as the previous screenshot, with the 'add attachment...' link visible.

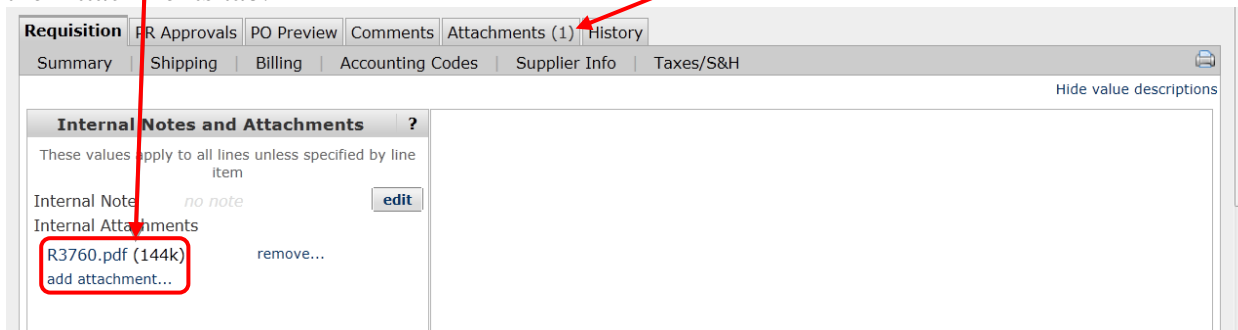
30. Double mouse click on file name to select the file.



31. Left mouse click on the **Save** button to add the attachment to the requisition.



32. The attachment will be added to the requisition and a number in parentheses will be added to the Attachments tab.



33. Once a file is attached there will be a **remove...** option. Use this option to remove the attachment.

Requisition | PR Approvals | PO Preview | Comments | Attachments (1) | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info | Taxes/S&H

Hide value descriptions

Internal Notes and Attachments ?

These values apply to all lines unless specified by line item

Internal Note *no note* [edit](#)

Internal Attachments

R3760.pdf (144k) [remove...](#)

[add attachment...](#)

34. The **External Notes and Attachments** can be used to add notes or documents, such as attaching the low-bid quote or an agreement, that needs to be passed to a supplier, and entering an Open Purchase Order term of contract and authorized users. A term of contract must contain begin and end dates. Follow steps 28 thru 33 to attach a file.

CougarMart eProcurement | profile | logout | 2012-08-21 PUR_TEMP1 03 | 1 item(s), 50.00 USD

Search for PR No. [Go](#)

External Notes and Attachments - 32487212 - Draft Requisition

home/shop | document search | contracts | **carts** | forms | more >>

active cart | draft carts | favorites | my requisitions

General Shipping Billing Accounting Codes Internal Notes and Attachments **External Notes and Attachments** Purchasing Use Only Terms and Conditions Final Review

[Return to shopping cart](#) [Continue Shopping](#)

You have completed the required information in this step. At this point, you can do the following:

Proceed to the next step: [Purchasing Use Only](#). Go straight to the end: [Final Review](#).

Requisition | PR Approvals | PO Preview | Comments | Attachments (1) | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info | Taxes/S&H

Hide value descriptions

External Notes and Attachments ?

These values apply to all lines unless specified by line item

Note to all Suppliers *no note* [edit](#)

Attachments for all suppliers

[add attachment...](#)

35. The **Terms and Conditions** section can be used to select a contract clause that applies to all items by going to the [edit clauses...](#) link. If you need to select separate clauses for line items, go to the **Summary** tab, choose the [edit clauses...](#) link, check the box for the clause, and **Save**.

Edit PO Clauses

Inherited PO Clauses

Clause No	Clause Name	Clause Text
No organization defaults assigned		

Assign PO Clauses

Select: All, None

Clause No	Clause Name	Clause Text	Assigned
00000001	Computers and Misc Hardware	State of Texas Contract #DIR-SDD-890 Contract Code 48ABO (R-2517 Annual Contract for Dell Desktop ... [show more]	<input type="checkbox"/>
00000003	Medical Supplies for Health Sciences Classes	3268 Annual Contract for Medical Supplies for Health Sciences Classes	<input type="checkbox"/>
00000004	Furniture and Shelving for Central Park Campus Library	3061 Furniture and Shelving for Central Park Campus Library	<input type="checkbox"/>
00000005	Fitness Equipment Maintenance	3249 Annual Contract for Maintenance of Fitness Equipment	<input type="checkbox"/>
00000006	Culinary Classroom Smallwares and Equipment	3265 Annual Contract for Smallwares and Equipment for Culinary Classroom	<input type="checkbox"/>
00000007	Printer Cartridges and Ribbons	3277 Annual Contract for Printer Cartridges and Ribbons	<input type="checkbox"/>

Save **Close**

36. Left mouse click on the **Place Order** button at the top right of your screen to send your request for approval.

37. You will receive a screen stating that you have successfully completed your request. The screen will display your assigned requisition number (841835) and your cart name. The requisition number is a hyperlink. At the top of this window is a **Quick View** link that will allow you to view a printable copy of your requisition.

The screenshot shows the 'Submitted - Requisition 841835' page in the CougarMart eProcurement system. The page has a green header with the CougarMart logo and navigation links like 'Test Requisitioner', 'profile', and 'logout'. A search bar is present with 'Catalog No. (SKU)' as the search criteria. Below the header, there are tabs for 'home/shop', 'carts', 'forms', 'document search', and 'more >>'. The 'active cart' tab is selected, showing 'draft carts', 'favorites', and 'my requisitions'. The main content area is titled 'Requisition Information' and contains a green checkmark icon with the text: 'Congratulations! You have successfully submitted your request. If you need to view or print a copy, click [Quick View](#) or view its status on the Approvals Tab.' Below this, a summary of the requisition is provided: Requisition number 841835, Requisition status Pending, Cart name 2012-09-07 PUR_TEMP1 01, Requisition date 3/14/2013, Requisition total 1.00 USD, and Number of line items 1. At the bottom, there is a section titled 'What would you like to do next? Here are links to some common actions.' with a list of links: Search for another item, View order history, Check the status of an order, Return to your home page, and Create new draft cart.

38. If you click on the requisition number then go to the PR Approvals tab, you will see the approval path. The first step in the approval path is **Banner Budget Authorization**. The **Banner Budget Authorization** verifies that you are an authorized user and that funds are available for use. If you are not authorized or funds are not available, your request will be returned. You can view the reason for the return on the History tab of the document.

The screenshot shows the 'Approvals - Requisition 833672' page in the CougarMart eProcurement system. The page has a green header with the CougarMart logo and navigation links like 'Cindy Smith', 'profile', and 'logout'. A search bar is present with 'PR No.' as the search criteria. Below the header, there are tabs for 'home/shop', 'carts', 'approvals', 'forms', 'contracts', 'document search', 'reports', and 'more >>'. The 'approvals' tab is selected, showing 'requisition', 'purchase order', 'requisition outbox', and 'purchase order outbox'. The main content area is titled 'Return to Approvals' and shows '1 of 41 results' for 'Folder: My PR Approvals'. Below this, there is a section titled 'Requisition PR Approvals' with tabs for 'Requisition', 'PR Approvals', 'PO Preview', 'Comments (1)', 'Attachments', and 'History'. The 'PR Approvals' tab is selected, showing a flowchart of the approval path. The flowchart starts with 'Submitted' (Test Requisitioner 8/22/2012 10:11 AM) and goes through several steps: Banner Budget Authorization (Approved), Organization Manager Approval (Active), Account Review (Future), AVP / CFO Approval (Future), and Create PO (Future). Each step has an 'Expedite' button. The flowchart ends with a 'Finish' icon.

39. You must correct the problem and re- **Place Order**.

40. You can return to the document's **PR Approvals** or **History** tabs at any time to check the status.

NOTE: The Requisitioner Role is set to automatically receive an e-mail when a purchase order is sent to the Supplier. This e-mail will contain the PO number and a link to the PO. PO details will not be part of the notification.

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** and Requisition/PR Approvals/PO Preview/Comments/Attachments/History tabs.

The screenshot displays the CougarMart eProcurement interface. At the top, the user is logged in as Cyndy Smith. The main heading is "History - Requisition 833672". Below this, there are navigation tabs: requisition, purchase order, requisition outbox, and purchase order outbox. The "requisition" tab is selected. Under this tab, there are sub-tabs: Requisition, PR Approvals, PO Preview, Comments (1), Attachments, and History. The "History" sub-tab is selected. A red arrow points to a button labeled "Click to filter history" which is circled in red. Below this button, there is a table of requisition history. The table has columns: Line No, Date/Time, User, Step(s), Action, Field Name, From, To, and Note. The first row shows a requisition restarted by Cyndy Smith on 8/22/2012 at 10:26 AM, with a note about changing the approver from Cindy White to Cindy White.

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	8/22/2012 10:26 AM	Cyndy Smith	Organization Manager Approval	Restarted				changed approver from incorrect inactivated Cindy White to correct active Cindy White.

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.

Always remember to click on the white "logout" link at the very top of the window to close out your session.

Receiving will still be done in Banner (see pages 63-71 for instructions).

Selecting a Supplier Contract (If Applicable)

There are many Collin College contracts already loaded in CougarMart. When searching for items, if the contract has been loaded, the appropriate contract will automatically link to the item.

When adding the item to a cart, the contract will carry forward into the cart with the item.

CougarMart eProcurement | profile | logout | 2013-03-14 PUR_TEMP1 01 | 1 item(s), 20.83 USD

Cart - 37381531 - Draft Requisition

home/shop | document search | contracts | **carts** | forms | more >> | AAA

active cart | draft carts | favorites | my requisitions

Shopping Cart for PUR_TEMP1

Name this cart: 2013-03-14 PUR_TEMP1 01

Continue Shopping

1 Item(s) for a total of **20.83** USD
 subtotal: 20.83 USD
 estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

Have you made changes? **Update** | **Help** | **Empty Cart** | Perform an action on (0 items selected)... | Select All ☐

Product Description	Unit Price	Quantity	Total
Moore Medical LLC more info... Hypodermic Syringe, Luer Lock Tip, clear syringe barrel, sterile, 20cc, 50/box Item added on Mar 14, 2013 Add to Favorites Remove More Actions	20.83 USD BX	1	20.83 USD
Part Number 84127 Contract 3268-3 more info... Annual Contract for Medical Supplies for Health Sc...		Update	

The more info... link next to the contract number will provide more in-depth information regarding the **Contract Summary**.

Contract Summary

Contract: 3268 (Annual Contract for Medical Supplies for Health Science Classes)
Supplier: Boundtree Medical

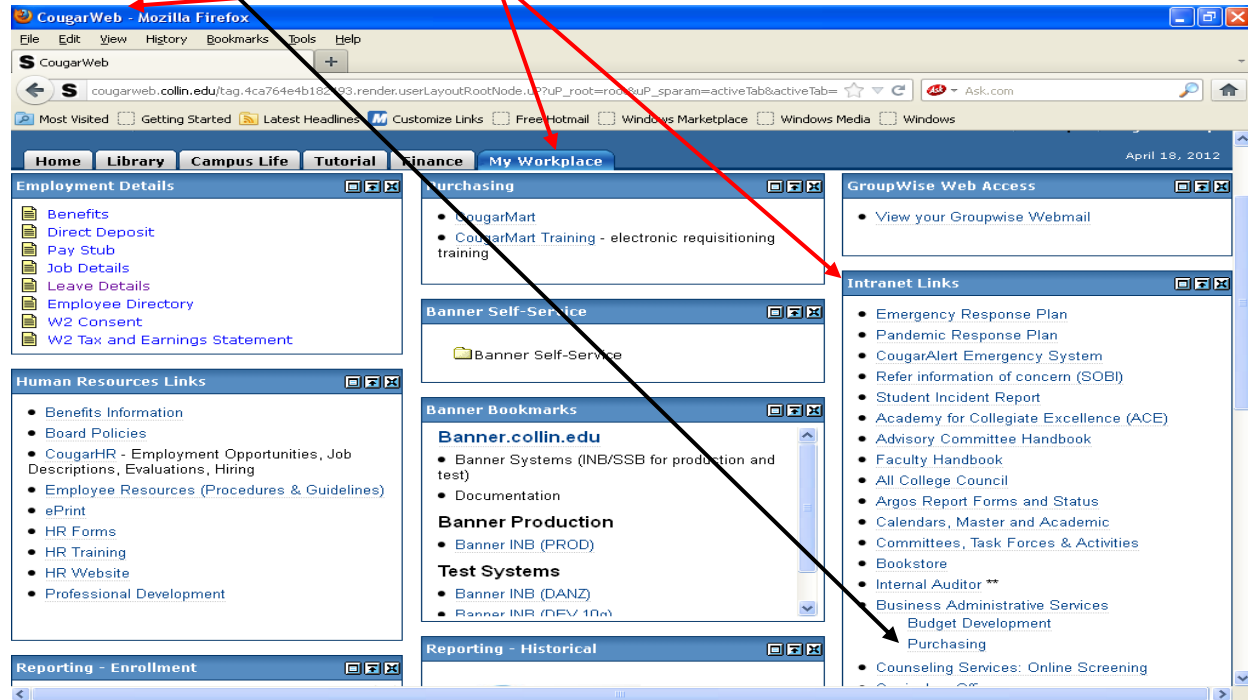
Contract Info		Controls	
General			
Contract Number	3268	Owners	
Contract Name	Annual Contract for Medical Supplies for Health Science Classes	Jennifer Glenn	Email: JGlenn@collin.edu Phone: +1 (972) 758-3874
Contract Type	Goods and Services	Cherri Smith	Email: cksmith@collin.edu Phone: +1 (972) 758-3878
Supplier Name	Boundtree Medical	Applicability	
Active	✓	Grant access to this contract using Departments and Roles	
Apply Automatically	✓	Departments with access to this Contract	
Description	Purchases of medical supplies to support the annual classroom needs for the Health Science Department as well as other departments as needed.	<ul style="list-style-type: none"> • Apply to All 	
Effective Date	7/25/2011 12:00 AM CST	Roles with access to this Contract	
Expiration Date	7/24/2012 11:59 PM CST	<ul style="list-style-type: none"> • Apply to All 	
Details		Users explicitly granted access to this contract	
Hard copy location		<ul style="list-style-type: none"> • None Assigned 	
Contract soft copy		Applicable Fulfillment Centers	
Supporting documents	• Discount Price List	Fulfillment Address(es) Assigned to this Contract	
Flex field 1			

Close

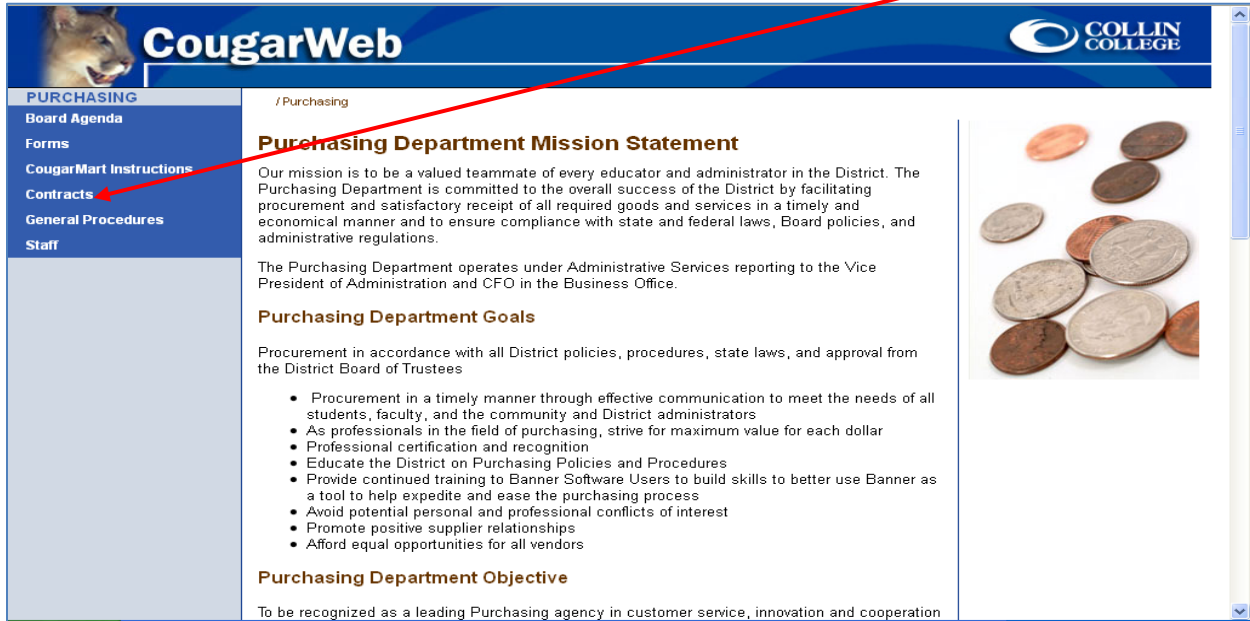
If searching for an item that is not loaded, first determine if a contract is already in place which may have the item(s) available for purchase.



Check the **Purchasing** intranet (**CougarWeb, My Workplace, Intranet Links**) for available contracts.



Once on the **PURCHASING** Department intranet home page, click the link for **Contracts** and the **Contracts** page will be shown.



CougarWeb 

PURCHASING / Purchasing

Board Agenda
Forms
CougarMart Instructions
Contracts
General Procedures
Staff

Purchasing Department Mission Statement

Our mission is to be a valued teammate of every educator and administrator in the District. The Purchasing Department is committed to the overall success of the District by facilitating procurement and satisfactory receipt of all required goods and services in a timely and economical manner and to ensure compliance with state and federal laws, Board policies, and administrative regulations.

The Purchasing Department operates under Administrative Services reporting to the Vice President of Administration and CFO in the Business Office.


Purchasing Department Goals



Procurement in accordance with all District policies, procedures, state laws, and approval from the District Board of Trustees

- Procurement in a timely manner through effective communication to meet the needs of all students, faculty, and the community and District administrators
- As professionals in the field of purchasing, strive for maximum value for each dollar
- Professional certification and recognition
- Educate the District on Purchasing Policies and Procedures
- Provide continued training to Banner Software Users to build skills to better use Banner as a tool to help expedite and ease the purchasing process
- Avoid potential personal and professional conflicts of interest
- Promote positive supplier relationships
- Afford equal opportunities for all vendors

Purchasing Department Objective

To be recognized as a leading Purchasing agency in customer service, innovation and cooperation



 <h1>CougarWeb</h1>				
PURCHASING Board Agenda Forms CougarMart Instructions Contracts General Procedures Staff	<p align="center">/ Purchasing</p> <h2>Contracts</h2> <p>**Please attach all requisition/purchase order backup to the requisition internal/external notes and attachments.**</p> <p>To view a list of CCCCD contracts, please select one of the following links, which will allow you to view them by the product description or by the vendor name.</p> <p>CONTRACTS BY DESCRIPTION CONTRACTS BY VENDOR NAME</p> <p>To view contract information by specific categories, use the links in the following chart:</p> <p>Art & Music</p> <ul style="list-style-type: none"> ▪ Equipment and Supplies <p>Audio Visual</p> <ul style="list-style-type: none"> ▪ Audio Visual Equipment & Media Supplies ▪ Projection Lamps <p>Catering</p> <p>NOTE: Effective July 21, 2008, all catering for the college is provided by Chartwells.</p> <p>Once the event has been completed, the Food Services Department will submit the original food services request form to the requestor for approval by the appropriate VP. That department is responsible for sending the invoice to Roxanne Jones in the Business Office for payment.</p> <p>Food services request forms are available from the Food Services Department at SCC.</p> <p>Patrick Shimek, Food Service Manager Phone: 972-881-5949</p> <p>Communication Devices</p> <ul style="list-style-type: none"> ▪ Cellular Phones - AT&T Wireless ▪ Pagers - Renewal and New <p>Computers</p> <ul style="list-style-type: none"> • Computer Related Purchases • Desktop Computers - See Dell Punch-out in CougarMart Showcased Suppliers • Notebook Computer - See Dell Punch-out in CougarMart Showcased Suppliers • Monitors - See Dell Punch-out in CougarMart Showcased Suppliers • Speakers - See Dell Punch-out in CougarMart Showcased Suppliers • Software • UPS <p>Cooperative Purchasing Links</p> <ul style="list-style-type: none"> • Collin County Governmental Purchaser's Forum • U.S. Communities • State of Texas • TXMAS (Texas Multiple Award Schedules) • TCPN (The Cooperative Purchasing Network) • BuyBoard • E&I Cooperative (Educational & Institutional) <p>Copier</p> <ul style="list-style-type: none"> • Copier Repairs • Copystar Desktop Copiers <p>Educational Media</p> <ul style="list-style-type: none"> • Books, Magazines, Software, Videos, DVD's, CD's <p>Furniture</p>			
	<p>NOTE: Furniture can be ordered to match existing furniture. Listed below are the College standards:</p> <ul style="list-style-type: none"> • HON/Allsteel (Bookcases, Chairs, Desks, File and Storage Cabinets) • KI (Krueger International) Stack Seating, Tables, and Accessories - See CougarMart • Podium <p>Office Machines</p> <ul style="list-style-type: none"> • FAX / Printer / Scanner General Information • Repairs/Maintenance/Service for FAX/Printer/Scanner <p>NOTE: If the repair of an office machine is more than half the cost to purchase a new one, refuse the repair, pay the service call, and complete a requisition for a new machine.</p> <p>Plant Operations</p> <table border="0"> <tr> <td> <ul style="list-style-type: none"> ▪ Air Filters ▪ Custodial Services ▪ Electrical Work ▪ Elevator ▪ Fertilization ▪ Fire System Inspection and Repair ▪ Fitness Equipment ▪ Hardware - See CougarMart for Grainger ▪ Herbicide ▪ HVAC Repair and Maintenance </td> <td> <ul style="list-style-type: none"> ▪ HVAC Water Treatment ▪ Lighting, Lamps, Ballasts ▪ Moving Services ▪ Mowing ▪ Paper - See CougarMart ▪ Parking Lot Re-striping ▪ Pest Control ▪ Refinishing Hardwood Floors ▪ Security Guard Services ▪ Uniform Services ▪ Window Blinds </td> </tr> </table> <p>Promotional Items</p> <ul style="list-style-type: none"> • B-3424 Promotional Products - See CougarMart for Joy Promotions • B-3294 Printed and Embroidered Shirts <p>Note: Departments must take full responsibility for delivery of artwork to the vendor or must coordinate delivery of artwork through Public Relations. Art must be created or approved by the Public Relations Department. Art approval must be received by the Purchasing department prior to receipt of the requisition through the Banner approval process.</p>		<ul style="list-style-type: none"> ▪ Air Filters ▪ Custodial Services ▪ Electrical Work ▪ Elevator ▪ Fertilization ▪ Fire System Inspection and Repair ▪ Fitness Equipment ▪ Hardware - See CougarMart for Grainger ▪ Herbicide ▪ HVAC Repair and Maintenance 	<ul style="list-style-type: none"> ▪ HVAC Water Treatment ▪ Lighting, Lamps, Ballasts ▪ Moving Services ▪ Mowing ▪ Paper - See CougarMart ▪ Parking Lot Re-striping ▪ Pest Control ▪ Refinishing Hardwood Floors ▪ Security Guard Services ▪ Uniform Services ▪ Window Blinds
<ul style="list-style-type: none"> ▪ Air Filters ▪ Custodial Services ▪ Electrical Work ▪ Elevator ▪ Fertilization ▪ Fire System Inspection and Repair ▪ Fitness Equipment ▪ Hardware - See CougarMart for Grainger ▪ Herbicide ▪ HVAC Repair and Maintenance 	<ul style="list-style-type: none"> ▪ HVAC Water Treatment ▪ Lighting, Lamps, Ballasts ▪ Moving Services ▪ Mowing ▪ Paper - See CougarMart ▪ Parking Lot Re-striping ▪ Pest Control ▪ Refinishing Hardwood Floors ▪ Security Guard Services ▪ Uniform Services ▪ Window Blinds 			
	<p>CONTACT</p> <ul style="list-style-type: none"> ▪ Tere Beaty Ext. 3873 tbeaty@collin.edu E-fax: 972-377-1073 			

Once it has been determined that a contract may exist where the requested item could be obtained, the supplier(s) for that contract should be contacted for availability and a quote, if applicable. Most contact information is available on the contract page.

Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://inside.collin.edu/purchasing/contract_promo.html

inside.collin.edu/purchasing/contract_promo.html

Most Visited Getting Started Latest Headlines Customize Links Free Hotmail Windows Marketplace Windows Media Windows

CougarWeb COLLIN COLLEGE

PURCHASING

- Board Agenda
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/Purchasing

PROMOTIONAL PRODUCTS

B-3424
TERM OF CONTRACT: 3/01/2012 - 2/28/2013

The Purchasing Department has bid Promotional Products, pre-approving vendors for your convenience. When purchasing products for promotional use, please refer to the below list of recommended vendors that have participated in this bid process. These vendors have provided additional discounts as noted. When purchases total less than \$1,000, the requesting department should obtain one quote to establish price for the requisition. When purchases total over \$1,000, three written quotes need to be submitted with the requisition utilizing the below list of vendors.

Before proceeding to checkout when the cart is complete, select the correct contract for each item requested. In the Product Description of each item, under the Part Number and/or Manufacturer Info, there is a link to choose contract. For promotional items, select 3424 (Annual Contract for Promotional Products) and click OK.

Artwork must be either created or approved by the Public Relations (PR) Department. Departments must take full responsibility for delivery of artwork to the vendor or coordinate delivery through PR.

Following are instructions for artwork **created** by PR:

- Allow up to 6 weeks for artwork design. Contact PR for art design request.
- Provide PR with the print specifications for the item (e.g., vendor, description of item, size of imprint area, number of ink colors).
- PR will provide a job number for the artwork. This job number must be included with the item description on the requisition.
- PR will send the artwork to the vendor upon design approval by the client and receipt of department's Purchase Order number.

Following are instructions for artwork **approved** by PR:

- Departments creating their own artwork must adhere to Public Relations graphics standards provided on the Public Relations link on CougarWeb.
- Departments must email a PDF of the art design to Marlene Miller, Coordinator of Graphic Design. PR will return an email approval to the department.

Vendors should be capable of receiving art files electronically. Artwork provided by PR is on MAC systems. PR artwork includes, but is not limited to, current versions of MAC InDesign, Quark, Adobe Acrobat, Photoshop, and/or Illustrator Files.

Delivery date is the lead-time required by the vendor "after receipt of artwork."

VENDOR	CONTACT	LOCATION	PHONE
Authentic Promotions http://www.authenticpromotions.com	Peter Carmazzi Vendor #100001824	6151 Fair Oaks Blvd, Ste 103 Carmichael, CA 95608	800-497-7765
Best Press Inc http://bestpress.logomall.com	Teri Cragle Vendor #100002028	4291 Airborn Dr Addison, TX 75001	972-930-1000
Joy Promotions, Inc. http://www.joypromotionsinc.com	Donna Joyner Vendor #100001010	2351 W Northwest Hwy, Ste 220 Dallas, TX 75220	214-368-3099
Positive Promotions http://www.positivepromotions.com	Michael Taxel Vendor #100134279	15 Gilpin Ave Hauppauge, NY 11788	877-258-1225

Once the Supplier has been determined for the requisition, whether it's a punch-out, hosted or non-catalog supplier, if there is a contract associated with the requisition (indicated by the [choose contract...](#) link) and it's not automatically linked, it must be selected manually.

CougarMart eProcurement | Tere Beaty | profile | logout | Cart for Contract | 1 item(s), 199.00 USD

Cart - 29284189 - Draft Requisition

home/shop | approvals | **carts** | document search | error management | user management | contracts | more >> | AAA

active cart | draft carts | other draft carts | favorites | my requisitions

Shopping Cart for Tere Beaty | Continue Shopping

Name this cart:

1 Item(s) for a total of **199.00 USD**
 subtotal: 199.00 USD
 estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

Have you made changes? **Update** | **Help** | **Empty Cart** | Perform an action on (0 items selected)... | Select All

Authentic Promotions | more info...
 Business 2 | Edit
 Ste 103, 6151 Fair Oaks Blvd, Carmichael, CA 95608 US

Product Description	Unit Price	Quantity	Total
Royal Blue Table Runner w/1 Color Imprint, White Trim and White Imprint Item added on Apr 17, 2012 Add to Favorites Remove More Actions	199.00 USD EA	1	199.00 USD

Part Number: Item #103002
 Contract: None selected [choose contract...](#)

Click on the [choose contract...](#) link and the **Price Select** dialog box opens. Select the appropriate contract and click **OK**.

Price Select - Mozilla Firefox

scquest.com | https://solutions.scquest.com/apps/Router/SimpleCartPriceSelectPopup?DocumentId=29284189&LineId=107480486&UnitPrice=199.00&UnitPrice_Curr

Select a Price and Contract Here

Step 1: Select a Price | **Step 2: Select a Contract**

Price set currency: USD
☒ 199.00 USD (Current price)

☐ No Contract
☐ 3294 (Annual Contract for Printed T-Shirts and Embroidered Polo Shirts)
 Purchase t-shirts and embroidered polo shirts for the District
☒ 3424-1 (Annual Contract for Promotional Products)
 Purchase of promotional products for the District. Board of Trustees approved \$50,000.00 total for contract.

OK **Cancel**

For a supplier who has multiple contracts, the correct contract will have to be manually selected when processing the cart in CougarMart. If the supplier has only one current contract, the contract number will be automatically linked when the item is placed in the cart.

Have you made changes? [Update](#) [Help](#) [Empty Cart](#) Perform an action on (0 items selected)... [Select All](#)

Dell Marketing LP [more info...](#)
 Business 1 [Edit](#)
 Attn: Jae Shin 5139209, One Dell Way, RR8, Round Rock, TX 78682 US

The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 4/19/2012 11:14:24 AM
 Line(s): 1, 2

	Product Description	Unit Price	Quantity	Total
Item added on Apr 19, 2012	Professional P190S 19-inch Flat Panel Monitor with 3 Year Warranty Part Number: P190S3Y Manufacturer Info: 9M62C - (Dell) Contract: <i>None selected</i> choose contract...	169.15 USD EA	1	169.15 USD
Item added on Apr 19, 2012	OptiPlex 790 MT;OptiPlex 790 Minitower for Standard Power Supply Part Number: 225-0781 Manufacturer Info: 225-0781 - (Dell) Contract: <i>None selected</i> choose contract...	843.00 USD EA	1	843.00 USD

Have you made changes? [Update](#)

2 Item(s) for a total of **1,012.15 USD**
 subtotal: 1,012.15 USD
 estimated tax, shipping & handling: 0.00 USD

[Proceed to Checkout](#) or [Assign Cart](#)

Select the appropriate contract and left mouse click on the **OK** button to save.

Price Select - Mozilla Firefox

<https://solutions.sciquest.com/apps/Router/SimpleCartPriceSelectPopup?DocumentId=32511390&LineId=119444501&UnitPric>

Select a Price and Contract Here ?

Step 1: Select a Price **Step 2: Select a Contract**

Price set currency **USD**
☒ **225.39 USD**
 (Current price)

☐ No Contract

☒ **2199 (Annual Contract for Fax Machines, Printers and Scanners)**
 Purchase of fax machines, printers and scanners for the District. (State of Texas Department of Information Resources Contract #DIR-SDD-890).

☐ **2486-2012 (Annual Contract for Purchase of Software)**
 Purchase of Software for the District. (State of Texas Department of Information Resources Contract # DIR-SDD-1014).

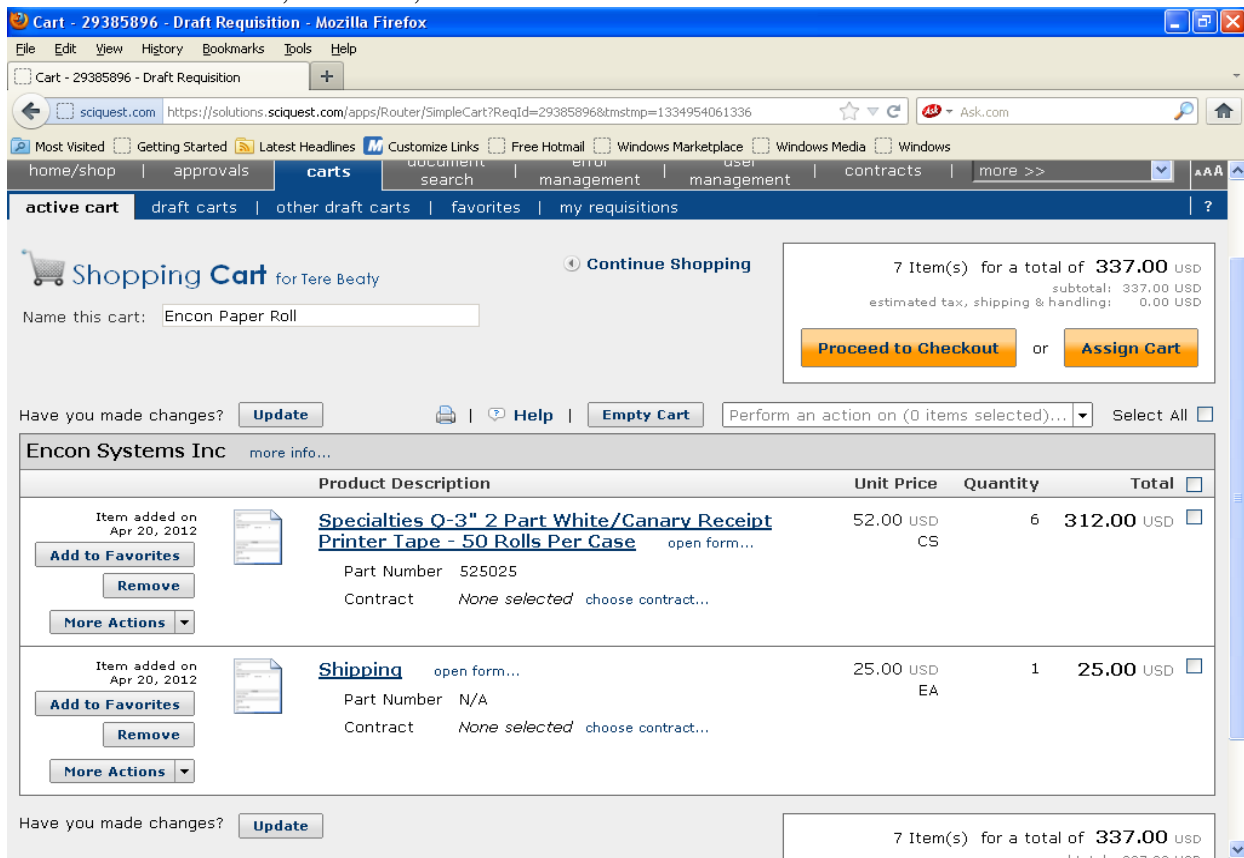
☐ **2517 (Annual Contract for Desktop and Notebook Computers)**
 Purchase the District's standardized desktop and notebook computer systems at volume discounts. (State of Texas Department of Information Resources Contract #DIR-SDD-890 Contract Code 48ABO).

☐ **3069 (Annual Contract for Power Protection Equipment)**
 Annual contract to purchase the District's power protection equipment (uninterruptible power supplies). State of Texas Contract #DIR-SDD-890, Contract Code 48ABO . Board approved total contract amount of \$50,000.00. 10/2011 - Board approved change order in the amount of \$33,000.00. 11/2011 - Board approved total contract amount of \$80,000.00.

☐ **3073-2012 (Registration Server Load Balancer Maintenance)**
 Annual purchase order for registration server load balancers maintenance.

[OK](#) [Cancel](#)

PLEASE NOTE: In a very few cases No Contract will be the correct choice. See the following example where specialty printer tape is ordered from Encon. The request does not fall under either Encon contract; therefore, No Contract is selected.



Cart - 29385896 - Draft Requisition - Mozilla Firefox

scquest.com https://solutions.scquest.com/apps/Router/SimpleCart?ReqId=29385896&tmstmp=1334954061336

home/shop | approvals | **carts** | document search | error management | user management | contracts | more >>

active cart | draft carts | other draft carts | favorites | my requisitions

Shopping Cart for Tere Beatty

Name this cart:

Continue Shopping

7 Item(s) for a total of **337.00 USD**
 subtotal: 337.00 USD
 estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

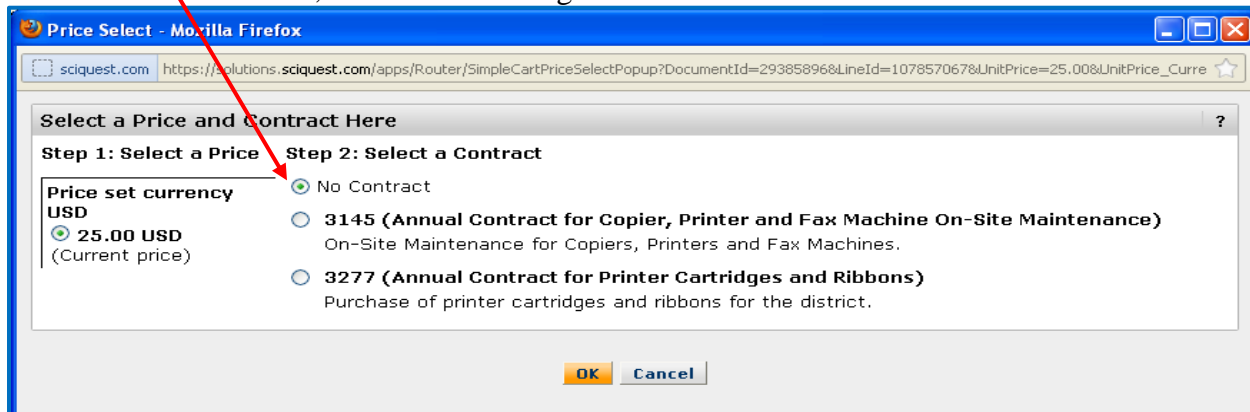
Have you made changes? **Update** | **Help** | **Empty Cart** | Perform an action on (0 items selected)... | Select All ☐

Encon Systems Inc		Product Description	Unit Price	Quantity	Total
Item added on Apr 20, 2012		Specialties 0-3" 2 Part White/Canary Receipt Printer Tape - 50 Rolls Per Case Part Number 525025 Contract <i>None selected choose contract...</i>	52.00 USD CS	6	312.00 USD
Item added on Apr 20, 2012		Shipping Part Number N/A Contract <i>None selected choose contract...</i>	25.00 USD EA	1	25.00 USD

Have you made changes? **Update**

7 Item(s) for a total of **337.00 USD**

No contract selected. This is determined by whether or not the items are available through the contract. For assistance, contact Purchasing.



Price Select - Mozilla Firefox

scquest.com https://solutions.scquest.com/apps/Router/SimpleCartPriceSelectPopup?DocumentId=29385896&LineId=1078570678&UnitPrice=25.00&UnitPrice_Curre

Select a Price and Contract Here

Step 1: Select a Price | **Step 2: Select a Contract**

Price set currency USD
☒ **25.00 USD** (Current price)

☒ **No Contract**

☐ **3145 (Annual Contract for Copier, Printer and Fax Machine On-Site Maintenance)**
 On-Site Maintenance for Copiers, Printers and Fax Machines.

☐ **3277 (Annual Contract for Printer Cartridges and Ribbons)**
 Purchase of printer cartridges and ribbons for the district.

OK **Cancel**

There is a clause associated with each annual contract in CougarMart that gives a short name for the contract and provides text regarding the contract number. When a contract is selected at the requisitioner's level, the clause is automatically added to (inherited by) the requisition. Once the clause is inherited, it can be removed only by the requisitioner. If your requisition/purchase order has contract information, this should be entered in the **External Notes and Attachments** for the Supplier and Auditors. Also, if the clause is added in the terms and conditions area, this will prevent the clause being repeated for every line item.

The screenshot shows the 'Summary - 29284189 - Draft Requisition' window in Mozilla Firefox. The main window displays requisition details for 'Business 2' and a table of line items. A 'PO Clause Details' pop-up window is open, showing 'Inherited PO Clauses' and 'Manually Assigned PO Clauses'. A red arrow points from the text above to the 'Inherited PO Clauses' section.

Clause No	Clause Name	Clause Text
00000016	Promotional Products	3424-1 Annual Contract for Promotional Products for the District.

Manually Assigned PO Clauses

There are no PO clauses associated with this contract.

Close

If an incorrect contract is chosen by the requisitioner, an incorrect clause will be inherited. Purchasing will return the requisition to the requisitioner to remove the inherited clause and to select the correct contract. It is not possible for Purchasing to remove an inherited clause.

If it cannot be determined by the requisitioner if there is a contract associated with the supplier or, in the case of multiple contracts, which contract to select, contact Purchasing for guidance. Making an incorrect selection will cause delays in processing the requisition.

Adding a Comment to a Requisition

Comments can be added to requisitions during the approval process to communicate from within the document to request information. The Comments function can also be used after order placement process to store information globally about the document. CougarMart has the ability choose recipients and to send these comments from within the application. Use the following instructions to add a comment to a requisition on the approval path.

1. Left mouse click on the **Comments** tab of your document.

The screenshot shows the CougarMart eProcurement interface. At the top, there's a header with the Collin College logo and user information: 'Cyndy Smith - System Admin profile | logout'. The main title is 'Comments - Requisition 40338201'. Below the title, there's a navigation bar with links: 'home/shop', 'carts', 'approvals', 'forms', 'contracts', 'document search', 'supplier management', 'reports', and 'more >>'. A search bar is also present. The main content area shows '6 of 6 results' and a 'Requisition Number(s)' dropdown set to '40338201'. Below this, there's a tabbed interface with 'Requisition', 'PR Approvals', 'PO Preview', 'Comments' (selected), 'Attachments', and 'History'. The 'Comments' tab shows 'Add Comment' button, 'Show comments for' dropdown set to 'Requisition', and 'Records found: 0'. A message states 'No comments have been added'.

2. Left mouse click on the **Add Comment** button. This will open the **Add Comment** window.

The screenshot shows the 'Add Comment' window open over the same background. The window has a title bar with 'Add Comment' and a close button. The main text says: 'This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.' Below this, there's a section for 'Email notification(s):' with a checkbox next to 'Christina Titus (Prepared by) <ctitus@collin.edu>' and a link 'add email recipient...'. There's a large text area for the comment, with '1000 characters remaining' and 'expand | clear' links. Below the text area, there's a section for 'Attach file to this document (optional):' with 'Attachment Type' set to 'File', a 'File Name' input field, and a 'Browse...' button. At the bottom, there are 'Add Comment' and 'Cancel' buttons.

3. Check the box beside the recipient's name, or left mouse click on the add email recipient... to add other recipients.
4. Type your message in the text box.
5. You have the option of browsing for and attaching a file.

- Left mouse click on the **Add Comment** button to send an e-mail. Your message will be sent via District e-mail to the selected recipient(s). The number of comments within the document will be indicated in parenthesis on the **Comments** tab.

CougarMart eProcurement | Cyndy Smith - System Admin | profile | logout | 2013-06-12 CLSMITH 01 | 1 item(s), 199.00 U

Comments - Requisition 39993338

Search for PR No. []

home/shop | carts | approvals | forms | contracts | **document search** | supplier management | reports | more >>

search | exports | saved searches

Return to Search Results | 4 of 66 results | Requisition Number(s) 39993338

Available Actions: Add Comment [Go]

Requisition | PR Approvals | **Comments (2)** | Attachments (1) | History

Add Comment

Show comments for Requisition []

Records found: 2

Cyndy Smith - System Admin [Reply To] [New Comment]
 Applies To: Requisition - 39993338
 Comment Added - 5/30/2013 12:06 PM

Randy, A new supplier 100175778 WinWay Corp has been created in Banner. The W-9 is attached to this CougarMart requisition.

Email sent: Randy Novotny <rnovotny@collin.edu>, Tere Beaty <tbeaty@collin.edu>

Cyndy Smith - System Admin [Reply To] [New Comment]
 Applies To: Requisition - 39993338
 Comment Added - 5/30/2013 11:55 AM

A new supplier 100175778 WinWay Corp has been created in Banner and is available for use in CougarMart. Purchase Order Distribution has been set to the supplied fax number.

Email sent: Christina Titus <ctitus@collin.edu>, Tere Beaty <tbeaty@collin.edu>

NOTE: The comment(s) will also be displayed in the Note column in the History of the document.

CougarMart eProcurement | Cyndy Smith - System Admin | profile | logout | 2013-06-12 CLSMITH 01 | 1 item(s), 199.00 U

History - Requisition 39993338

Search for PR No. []

home/shop | carts | approvals | forms | contracts | **document search** | supplier management | reports | more >>

search | exports | saved searches

Return to Search Results | 4 of 66 results | Requisition Number(s) 39993338

Available Actions: Add Comment [Go]

Requisition | PR Approvals | Comments (2) | Attachments (1) | **History**

Click to filter history | Export CSV

Results per page 20 | **Records found: 11** | Page 1 of 1

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	5/30/2013 12:07 PM	Cyndy Smith - System Admin		Requisition approval process completed				
	5/30/2013 12:07 PM	Cyndy Smith - System Admin	New Supplier Approval	Requisition approved				
	5/30/2013 12:06 PM	Cyndy Smith - System Admin		Comment Added				Randy, A new supplier 100175778 WinWay Corp has been created in Banner. The W-9 is attached to... more...
	5/30/2013 11:55 AM	Cyndy Smith - System Admin		Comment Added				A new supplier 100175778 WinWay Corp has been created in Banner and is available for use in CougarMa... more...

Copying a Cart

1. Click on the document search tab on the navigation bar.

The screenshot shows the CougarMart eProcurement Document Search page. The navigation bar at the top includes links for home/shop, favorites, forms, carts, document search (highlighted), profile, user management, and more >>. The document search tab is active, showing a search bar with 'Contract' entered and a 'Go' button. Below the navigation bar, the 'Search' section is expanded, displaying a dropdown menu with options: Requisition (selected), All Documents, Requisition, and Purchase Order. The 'Go' button is also visible. The search results are organized into several sections: Requisition Identification (Requisition Number(s), Requisition Name), Requisition Information (Participant(s), 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), 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), and Custom Fields (Account, Index, Location). Each section has a search icon (magnifying glass) next to it. At the bottom of the search results, there is a 'Go to:' link with options for 'my requisitions' and 'my purchase orders'.

Search Requisition simple search

Requisition Identification

Requisition Number(s)

Requisition Name

Requisition Information

Participant(s)

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

Custom Fields

Account Is Exactly Add another Account

Select from all values...

Index Is Exactly Add another Index

Select from all values...

Location Is Exactly Add another Location

Select from all values...

Go to: my requisitions | my purchase orders

2. Use the drop down beside **Search** to select Requisition.

- Enter search criteria, such as the Requisition Number of the document that you wish to copy, or your name in the Prepared By, or a Date range from the All Dates drop down.

The screenshot shows the CougarMart eProcurement Document Search interface. At the top, there's a navigation bar with links like 'home/shop', 'favorites', 'forms', 'carts', and 'document search'. Below this is a search bar with a dropdown menu set to 'Requisition'. To the right of the search bar is a 'Go' button. Below the search bar, there are two main sections: 'Requisition Identification' and 'Requisition Information'. The 'Requisition Identification' section includes fields for 'Requisition Number(s)' and 'Requisition Name'. The 'Requisition Information' section includes fields for 'Participant(s)', 'Prepared For', 'Prepared By', 'Date', 'Submit Date', 'Total Amount', 'Supplier', and 'Department'. A dropdown menu for 'All Dates' is open, showing a list of date ranges and options like 'Last 7 days', 'Last 30 days', 'Last 60 days', 'Last 90 days', 'Last 120 days', 'Yesterday', 'Today', 'Last Week', 'This Week', 'Calendar', 'Fiscal', and 'Other'. The 'Go' button is visible next to the search criteria.

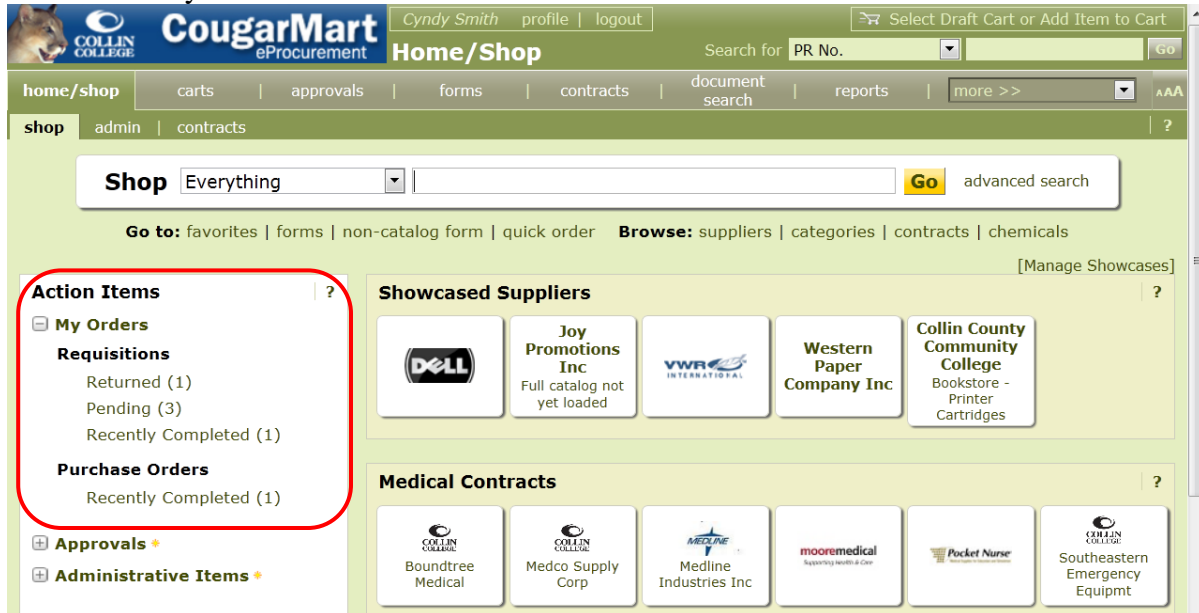
- Left mouse click on the **Go** button.
- Left mouse click on the **Requisition No.** of the document that you want to copy to open it.
- From the Available Actions drop down menu, select Copy to New Cart then click on the **Go** button.
- Proceed with the instructions from Entering a Requisition.

NOTES: Check that items are properly connected to the current contract.

If the requisition will be an open purchase order, make sure that the correct term of contract and the authorized users are listed in the **External Notes and Attachments**. If the requisition is for a new fiscal year, enter an Accounting Date of September 1st or later.

Locating a Document

The **Action Items** menu on the left side of the landing page will display your most recent **Requisitions** divided into categories such as Returned, Pending, and Recently Completed. This is the easiest way to locate a document.



CougarMart eProcurement
Cyndy Smith profile | logout | Select Draft Cart or Add Item to Cart

Home/Shop
Search for PR No. [Go]

home/shop | carts | approvals | forms | contracts | document search | reports | more >> | AAA

shop | admin | contracts

Shop Everything [Go] advanced search

Go to: favorites | forms | non-catalog form | quick order | Browse: suppliers | categories | contracts | chemicals [Manage Showcases]

Action Items ?

- My Orders
 - Requisitions**
 - Returned (1)
 - Pending (3)
 - Recently Completed (1)
 - Purchase Orders**
 - Recently Completed (1)
- Approvals +
- Administrative Items +

Showcased Suppliers ?

- Dell
- Joy Promotions Inc
Full catalog not yet loaded
- VWR International
- Western Paper Company Inc
- Collin County Community College
Bookstore - Printer Cartridges

Medical Contracts ?

- Boundtree Medical
- Medco Supply Corp
- Medline Industries Inc
- mooremedical
Supporting Health & Care
- Pocket Nurse
Medical Products and Services
- Southeastern Emergency Equipmt

An alternate way to locate an older document is thru the navigation bar document search tab.

1. Left mouse click on the document search tab of the navigation bar.

The screenshot shows the CougarMart eProcurement interface. The navigation bar at the top includes links for 'home/shop', 'favorites', 'forms', 'carts', 'document search' (highlighted with a red circle), 'profile', 'user management', and 'more >>'. Below the navigation bar, the 'Document Search' section is active. It features a search bar with a dropdown menu showing 'Requisition', 'All Documents', 'Requisition', and 'Purchase Order'. A red arrow points from the 'Search' label to this dropdown menu. The search results area is divided into several sections: 'Requisition Identification' (with fields for Requisition Number(s) and Requisition Name), 'Requisition Information' (with fields for Participant(s), Prepared For, Prepared By, Date, Submit Date, Total Amount, Supplier, and Department), 'Item/Product Information' (with fields for Catalog Number(SKU), Product Description, Commodity Code, Form Name, Form Type, and Product Flags), 'Contract Information' (with a field for Contract Number), 'Purchase Order Identification' (with a field for Purchase Order Number(s)), 'Workflow' (with a field for Current Workflow Step), 'Workflow Status' (with checkboxes for Completed, Pending, Rejected, and Withdrawn), 'Status Flags' (with checkboxes for With Rejected Lines, With Withdrawn Lines, With Errors, and With Attachments), and 'Custom Fields' (with fields for Account, Index, and Location). A 'Go' button is located at the bottom of the search results area. At the bottom of the page, there is a link to 'Go to: my requisitions | my purchase orders'.

2. Use the drop down beside **Search** to select All Documents, Requisition, or Purchase Order.

- Enter search criteria, such as the Requisition Number, or your name in the Prepared By, or a Date range from the All Dates drop down, or the Supplier.

CougarMart eProcurement Document Search

home/shop | favorites | forms | carts | document search

search | exports | saved searches

Search Requisition

Go

Requisition Identification

Requisition Number(s)

Requisition Name

Requisition Information

Participant(s)

Prepared For

Prepared By

Date Submit Date

Total Amount

Supplier

Department

All Dates

- Custom Date Range
- Days
 - Last 7 days
 - Last 30 days
 - Last 60 days
 - Last 90 days
 - Last 120 days
 - Yesterday
 - Today
 - Last Week
 - This Week
- Calendar
 - Month-To-Date
 - Last Month
 - Year-To-Date
 - Previous Year
- Fiscal
 - Fiscal Year-To-Date
 - Previous Fiscal Year
- Other
 - Before X Date
 - After X Date
 - Last X Days
 - Next X Days
 - Before the Last X Days
 - After the Last X Days

- Left mouse click on the **Go** button. Once your search is complete, your search criteria will be displayed on the left with other options to refine your search and your documents will be displayed on the main part of the screen.

CougarMart eProcurement Document Search

home/shop | favorites | forms | carts | document search | profile | user management | more >>

search | exports | saved searches

start new search | edit search

Showing 1 - 8 of 8 results

Fiscal Year-To-Date (9/1/2011-8/22/2012)

Results per page: 500 | Sort by: Best match | Page 1 of 1

Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
✓ 27851023	Plano Office Supply	PRC Additional Items	Jennifer Glenn	2/27/2012 2:58 PM	9,123.49 USD
✓ 28045958	Plano Office Supply	DOL Grant Furniture	Jennifer Glenn	2/27/2012 2:37 PM	2,515.48 USD
✓ 26773502	Plano Office Supply	Benches for PRC	Jennifer Glenn	1/17/2012 5:11 PM	17,402.64 USD
✓ 26505402	Plano Office Supply	PRC Additional Furniture	Jennifer Glenn	12/16/2011 4:22 PM	30,829.53 USD
✓ 25997610	Plano Office Supply	2011-11-18 Lab Chairs SCC	Doris Littrell	12/16/2011 4:18 PM	629.60 USD
✓ 25560367	Plano Office Supply	PRC Classroom & Conference Center Furniture	Jennifer Glenn	11/2/2011 5:02 PM	228,556.17 USD
✓ 25506398	Plano Office Supply	Mailroom Sorter - PRC	Jennifer Glenn	10/28/2011 8:54 AM	2,946.11 USD
✓ 24798599	Plano Office Supply	Lateral File for Sabrina Belt	Jennifer Glenn	9/29/2011 12:29 PM	594.91 USD

Results per page: 500 | Page 1 of 1

Filtered By

Type: Requisition

Date Type: Submit Date

Date Range: Fiscal Year-To-Date

Prepared By: Jennifer Glenn

Supplier: Plano Office Supply

Save Search | Export Search

Refine Search Results

Type: Requisition

Date Range: Fiscal Year-To-Date

Approved By

Cherri Smith (8)

Ralph Hall (7)

Mary Jordan (7)

Ed Leathers (5)

Brenda Kihl (3)

Department

Purchasing (Purchasing) (7)

Office - Provost (Office - Provost) (1)

Workflow Status

Completed (8)

Form Type

Non-Catalog Form (8)

Prepared For

Jennifer Glenn (7)

You can locate one of your requisitions by left mouse clicking on the **carts** tab and going to the my requisitions tab. This will provide you with a listing of your requisitions for the Last 90 days in the **document search**. You can refine your **Date Range** by using the **Refine Search Results** drop down.

CougarMart eProcurement | Test Requisitioner | profile | logout | Select Draft Cart or Add Item to Cart

Document Search | Search for PR No. | Go

home/shop | favorites | forms | carts | **document search** | more >> | AAA

search | exports | saved searches

start new search

Showing **1 - 4** of 4 results | Last 90 days (5/25/2012-8/22/2012)

Results per page: 20 | Sort by: Best match | Page 1 of 1

Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
833672	Dell Marketing LP	2012-08-22 PUR_TEMP1 01	Test Requisitioner	8/22/2012 10:11 AM	225.39 USD
544542	Business Printing Inc	2011-04-14 PUR_TEMP1 01	Test Requisitioner	8/6/2012 12:54 PM	0.00 USD
808146	Dell Marketing LP	2012-07-05 PUR_TEMP1 01	Test Requisitioner	7/5/2012 2:21 PM	1.00 USD
782871	Dell Marketing LP	2012-05-25 PUR_TEMP1 01	Test Requisitioner	6/25/2012 5:47 PM	0.00 USD

Search Terms
Prepared For: Test Requisitioner

Filtered By
Type: Requisition
Date Range: Last 90 days
Save Search | Export Search

Refine Search Results ?
Date Range
Last 90 days (selected)
All Dates
Custom Date Range
Days
Last 7 days
Last 30 days
Last 60 days
Last 90 days
Last 120 days
Yesterday
Today
Last Week
This Week
Calendar
Month-To-Date
Last Month
Year-To-Date
Previous Year
Fiscal
Fiscal Year-To-Date
Previous Fiscal Year
Other
Before X Date
After X Date
Last X Days
Next X Days
Before the Last X Days
After the Last X Days

Change Orders

- Change orders are submitted using the Purchasing Change Request form available in the CougarMart Showcased Services on the home page.
- Change orders cannot be done on purchase order line items that have been closed in Banner (indicated by a check mark in the box adjacent to the commodity description on the Commodity/Accounting screen of the purchase order.) A new requisition must be entered.
- Change orders for additional items, which exceed \$500, must be placed on a new requisition. Exception would be for repair of equipment, building, etc. where the cost of the repair is

estimated on the original order. In the case where the cost of the repair was estimated on the original order, a change order should be done to the purchase order.

- When a change order is done be sure to go into Banner to receive the change.
 - Change order requests will be reviewed on an individual basis. It is the department's responsibility to ensure that funds for the additional cost are available in their budget.
1. Use the [Purchasing Change Request](#) form from the **Showcased Services** area to submit a Change Order.

The screenshot shows the CougarMart eProcurement system interface. At the top, there is a header with the Collin College logo, the text 'CougarMart eProcurement', and user information: 'Cyndy Smith - System Admin profile | logout'. A date and item count are also displayed: '2012-08-31 CLSMITH 02 | 4 item(s), 10.00'. Below the header is a navigation bar with links: 'home/shop', 'carts', 'approvals', 'forms', 'contracts', 'document search', 'reports', and 'more >>'. A search bar is present with the text 'Search for PR No.' and a 'Go' button. The main content area is divided into sections. On the left, there is a sidebar with 'Action Items' (My Orders, Administrative Items) and a 'Welcome to CougarMart!' message. The main content area has a 'Shop' section with a dropdown menu set to 'Everything' and a 'Go' button. Below this is a 'Go to:' section with links: 'favorites', 'forms', 'non-catalog form', 'quick order'. A 'Browse:' section has links: 'suppliers', 'categories', 'contracts', 'chemicals'. The 'Showcased Suppliers' section displays logos for Dell, Grainger, Joy Promotions Inc, KI, VWR International, and Western BRW Paper Company. The 'Showcased Services' section has a link for 'Purchasing Change Request' which is circled in red. Other links in this section include 'Non-Catalog Form' and 'New Vendor Add Form'.

2. The [Purchasing Change Request](#) form contains **PO Change Instructions** on the left hand side and fields for entering the specifics of the requested change are on the right.

The screenshot shows the 'Purchasing Change Request' form in a web browser. The form is divided into two main sections: 'PO Change Instructions' on the left and 'Purchase Order Information' on the right. The 'PO Change Instructions' section contains a 'Change Order Policy/Procedure' and a list of items for which change orders should be used. The 'Purchase Order Information' section contains fields for Vendor, PO Number, Requisition No, Current PO Total, Revised PO Amount, Type of change, Increase/Decrease Amount, and a large text area for 'Changes required'. The form also includes a 'Total' field at the bottom right showing '0.00'.

3. Enter the **Vendor** name.
4. Enter the **PO Number**.
5. Enter the **Requisition No.**
6. Enter the **Current PO Total: \$** amount.
7. Enter the **Revised PO Amount: \$**.
8. Use the drop down to select the **Type of change**.
9. Enter the **Increase/Decrease Amount**.
10. In the **Changes required:** box enter a description of the change(s) including the line number of the item from the original purchase order.
11. From the Available Actions tab, choose Add and go to Cart then left mouse click on the Go button.
12. You will need to address any items with a red triangle, such as Req Delivery (date) and Accounting Codes. Click on the **edit** button for each of these items to make corrections.
13. Left mouse click on the **Place Order** button to submit your Change Request to the Purchasing System Specialist.
14. The **PR Approvals** tab of your Change Request will show **Banner Budget Authorization**, your **Organization Manager**, and the Purchasing System Specialist as **Form Approval**.

The screenshot displays the CougarMart eProcurement interface. At the top, the user is logged in as Cyndy Smith - System Admin. The page title is "Approvals - Requisition 32766488". The navigation bar includes links for home/shop, carts, approvals, forms, contracts, document search, reports, and more. The main content area shows the "PR Approvals" tab selected. Below the tab, there are buttons for "Return to Search Results", "5 of 542 results", and "Requisition Number(s) 32766488". The "Available Actions" dropdown is set to "Add Comment". The workflow steps are listed below:

- Submitted:** Minnie Garcia, 8/31/2012 10:28 AM. Status: **Banner Budget Authorization** (Approved by System).
- Approved:** Bobbie Long. Status: **Organization Manager Approval** (Approved).
- Approved:** Tere Beaty. Status: **Form Approval** (Approved).
- Completed:** 8/31/2012 11:33 AM.

New Vendor Add Form

1. In the **Showcased Services** area choose the New Vendor Add Form to submit a request for a new supplier to be added.

The screenshot shows the CougarMart eProcurement system interface. At the top, the header includes the Collin College logo, the text 'CougarMart eProcurement', and user information: 'Cyndy Smith - System Admin', 'profile', 'logout', and a shopping cart icon with '2012-08-31 CLSMITH 02 | 4 item(s), 10.00'. Below the header is a navigation bar with links: 'home/shop', 'carts', 'approvals', 'forms', 'contracts', 'document search', 'reports', and 'more >>'. A secondary navigation bar shows 'shop', 'admin', and 'contracts'. The main content area has a 'Shop' section with a dropdown menu set to 'Everything' and a 'Go' button. Below this are links for 'Go to: favorites | forms | non-catalog form | quick order' and 'Browse: suppliers | categories | contracts | chemicals'. On the left, there's an 'Action Items' section with 'My Orders' (Requisitions - Recently Completed (1)) and 'Administrative Items'. The 'Showcased Suppliers' section displays logos for Dell, Grainger, Joy Promotions Inc, KI, VWR International, and Western BRW Paper Company. The 'Showcased Services' section at the bottom contains links for 'Purchasing Change Request', 'Non-Catalog Form', and 'New Vendor Add Form' (which is circled in red). A red arrow points from this link to the instruction text above.

2. Enter the **Name of Business**.

The screenshot shows the 'New Vendor Add Form' window. At the top, it says 'New Vendor Add Form' and 'Available Actions (Click here for details): Add and go to Cart'. Below this is a section titled 'New Supplier Add Form' with a red note: 'Bold indicates a Required field.' The form contains the following fields and options:

- Name of Business**: A text input field.
- Supplier's Tax ID#**: A text input field.
- Is supplier already in Banner with a different address? (If yes, please add note in Comments field)**: Radio buttons for 'Yes' and 'No'.
- Comments**: A large text area for notes.

At the bottom of the form, it says '300 characters remaining' and 'expand | clear'.

3. Enter the **Supplier's Tax ID#**.
4. Choose whether the supplier already exists in Banner and enter a comment.

5. The Corporate Address is optional, but the **Supplier's Contact Name** is a required field. Please enter the sales contact here.

The screenshot shows a web form titled "Corporate Address (Sales)". It contains the following fields: "Street Address 1", "Street Address 2", "Street Address 3", "City", "State" (a dropdown menu), "Zip", "Supplier's Toll Free Phone Number", "Supplier's Contact Name(s)" (a large text area with a "300 characters remaining" indicator and "expand | clear" links), "Supplier's Phone Number", "Supplier's eMail Address", and "Supplier's Fax Number".

6. Enter the **Supplier's Phone Number**.
7. Enter the **Supplier's eMail Address**.
8. The Supplier's Fax Number is optional.
9. You must enter the street address where a purchase order can be sent.

The screenshot shows a web form titled "Supplier Purchase Order Delivery Address (Business)". It contains the following fields: "PO Street Address 1", "PO Street Address 2", "PO Street Address 3", "PO City", "PO State" (a dropdown menu with "Please select..." text), "PO Zip", a bold instruction "Supplier must be contacted to verify that they accept Purchase Orders. (If they do not accept a purchase order, you must select a different supplier.)", "How will vendor accept delivery of a purchase order?" (a dropdown menu with "Please select..." text), "eMail Address for PO Delivery", and "Fax Number for PO Delivery".

10. Enter the City, State, and Zip Code where a purchase order can be sent.
11. Select how a supplier will accept delivery of a purchase order.
12. You **MUST** enter either an eMail Address or Fax Number for PO Delivery.

13. It is optional to enter the Supplier's Remit To Address.

The screenshot shows a web form titled "Remit To Address (Accounts Receivable)". It contains several input fields for address information:

- Remit To Street Address 1
- Remit To Street Address 2
- Remit To Street Address 3
- Remit To City
- Remit To State (dropdown menu)
- Remit To Zip
- Remit To Contact
- Remit To Phone Number
- Remit To eMail Address

14. It is optional to enter if the Supplier participates in the Cooperative Purchasing contracts that we are approved to use.

The screenshot shows two sections of a web form. The top section is titled "Cooperative Purchasing" and includes the instruction "Please select any/all cooperative contract(s) that apply." Below this are several checkboxes for different cooperative contracts:

- BuyBoard
- Collin County Governmental Purchaser's Forum
- Educational and Institutional (E&I) Cooperative
- State of Texas - Department of Information Resources
- State of Texas - Term Contracts
- Texas Multiple Award Schedule (TXMAS)
- The Cooperative Purchasing Network (TCPN)
- U.S. Communities Government Purchasing Alliance

The bottom section is titled "Non-Catalog Requisition Information" and contains the following fields:

- Supplier: Collin College Purchasing
- Fulfillment Address: Fulfillment Address 1:

15. From the Available Actions drop down menu, choose Add and go to Cart then left mouse click on the **Go** button.

The screenshot shows a web browser window displaying the "New Vendor Add Form". The browser's address bar shows the URL: <https://solutions.sciquest.com/?&FavoriteProductId=1695095&wantReloadOnClose=1695095&callerScro>. The form has a title bar "New Vendor Add Form" and a sub-header "New Supplier". Below the sub-header is a red text label "Bold indicates". The form contains the following fields and instructions:

- Name of Business
- Supplier must be personally contacted to request a copy of their Form W-9 which then must be forwarded to Purchasing.
- Supplier's Tax ID#
- Is supplier already in Banner with a different address? (If yes, please add note in Comments field)

The "Available Actions" dropdown menu is open, showing the following options:

- Add and go to Cart
- Add and go to Cart (highlighted)
- Add to Cart and Return
- Add to Cart
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision
- Add To Favorites

The "Go" button is visible next to the dropdown menu.

16. Left mouse click on the **Proceed to Checkout** button.

CougarMart eProcurement Cyndy Smith profile | logout 2012-09-06 CLSMITH 01 | 1 item(s), 0.00 USD

Cart - 841706 - Draft Requisition

home/shop **carts** approvals forms contracts document search reports more >> AAA

active cart draft carts other draft carts assigned carts favorites my requisitions reminder settings ?

Shopping Cart for Cyndy Smith [Continue Shopping](#)

Name this cart: 2012-09-06 CLSMITH 01

1 Item(s) for a total of **0.00** USD
 subtotal: 0.00 USD
 estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

Have you made changes? **Update** [Help](#) **Empty Cart** Perform an action on (0 items selected)... Select All ☐

Collin College Purchasing more info...

Product Description	Unit Price	Quantity	Total
Item added on Sep 6, 2012 New Vendor Add Form open form... Add to Favorites Remove More Actions	0.00 USD	1	0.00 USD

17. Left mouse click on the **Place Order** button in the upper right side of the screen.

CougarMart eProcurement Cyndy Smith profile | logout 2012-09-06 CLSMITH 01 | 1 item(s), 0.00 USD

Summary - 841706 - Draft Requisition

home/shop **carts** approvals forms contracts document search reports more >> AAA

active cart draft carts other draft carts assigned carts favorites my requisitions reminder settings ?

☒ General
 ☒ Shipping
 ☒ Billing
 ☒ Accounting Codes
 ☒ Internal Notes and Attachments
 ☒ External Notes and Attachments
 ☒ Terms and Conditions
 ☒ Final Review
 Place Order or **Assign Cart**

[Return to shopping cart](#) [Continue Shopping](#)

All done! The required information has been completed and this request is ready to be submitted.

Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing Accounting Codes Supplier Info Taxes/S&H

Hide header Hide value descriptions

General		Shipping	Billing
Cart Name	2012-09-06 CLSMITH 01 edit	Ship To edit	Bill To edit
Accounting Date	no value	Attn: Cyndy Smith	Accounts Payable
Description	New Vendor Add form	Room: 360	PO Box 8021
Priority	Normal	Central Receiving	McKinney, TX 75070
Prepared by	Cyndy Smith	3452 Spur 399	United States
Prepared for	Cyndy Smith	McKinney, TX 75069	
Department	Purchasing (Purchasing)	United States	
Original Requisition Details (Bid Requests Only) edit		Delivery Options edit	
Original Requisition Number		Req Delivery 9/20/2012	

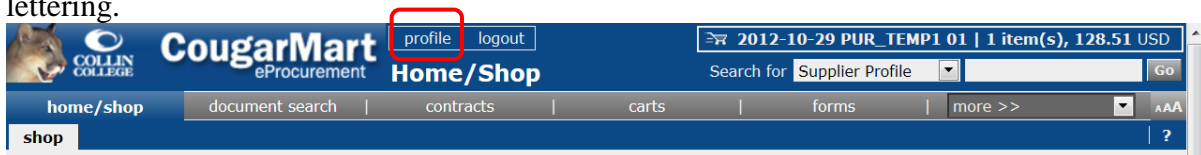
View/edit by line item...

18. Your request for the creation of a new supplier will be submitted to the Purchasing System Specialist. You will receive an eMail when your request has been fulfilled.

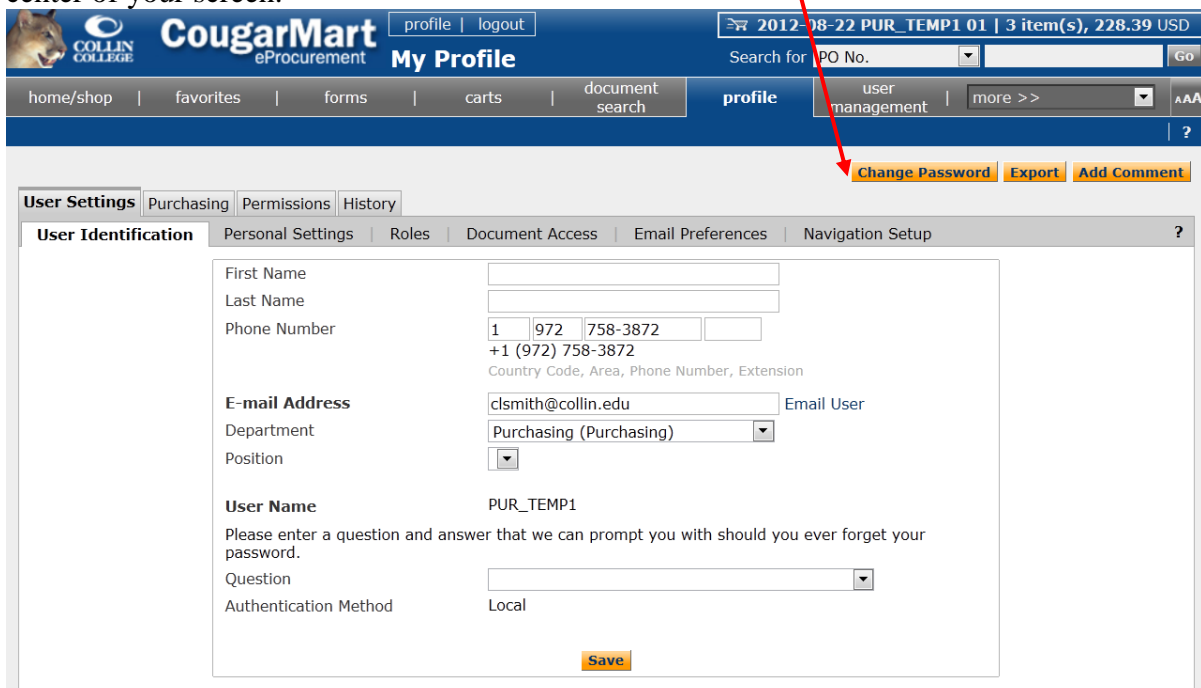
Password Change Instructions

Use the following steps to change your password:

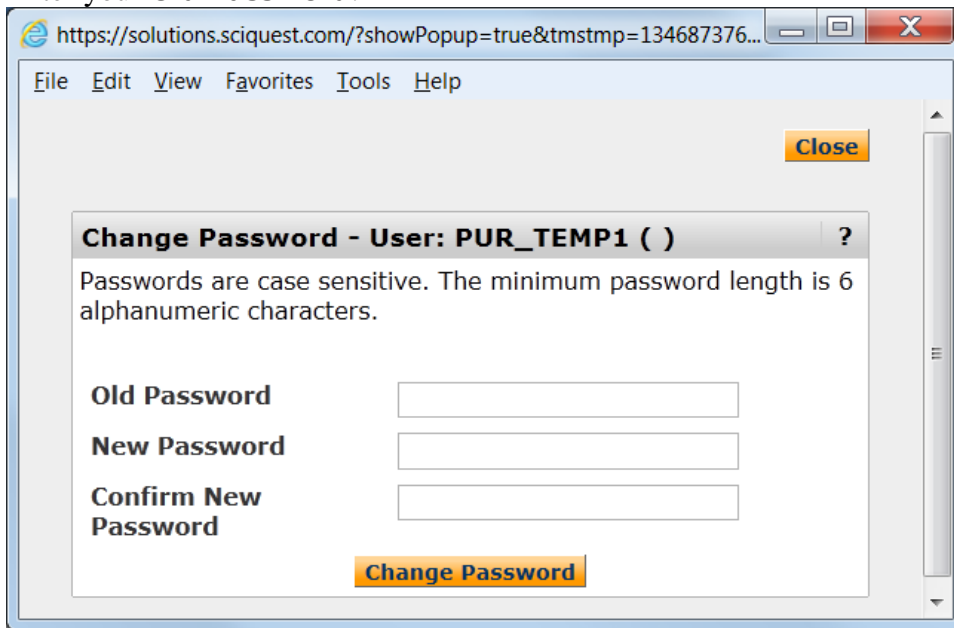
1. Left mouse click on the profile link at the very top center of the window. It is in white lettering.



2. When your profile opens, left mouse click on the yellow **Change Password** button in the top center of your screen.



3. Enter your **Old Password**.



https://solutions.sciquest.com/?showPopup=true&tmstmp=134687376...

File Edit View Favorites Tools Help

Close

Change Password - User: PUR_TEMP1 () ?

Passwords are case sensitive. The minimum password length is 6 alphanumeric characters.

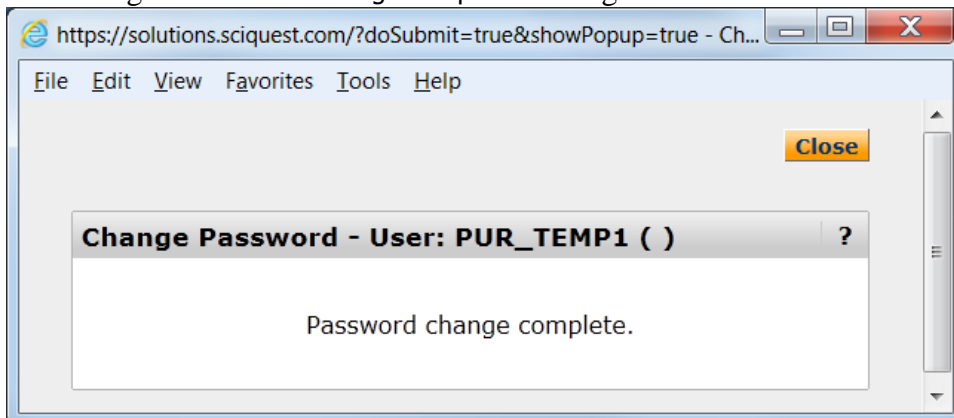
Old Password

New Password

Confirm New Password

Change Password

4. Enter your **New Password**.
5. Re-enter your new password in the **Confirm New Password** field.
6. Left mouse on the **Change Password** button.
7. You will get a Password change complete message.



https://solutions.sciquest.com/?doSubmit=true&showPopup=true - Ch...

File Edit View Favorites Tools Help

Close

Change Password - User: PUR_TEMP1 () ?

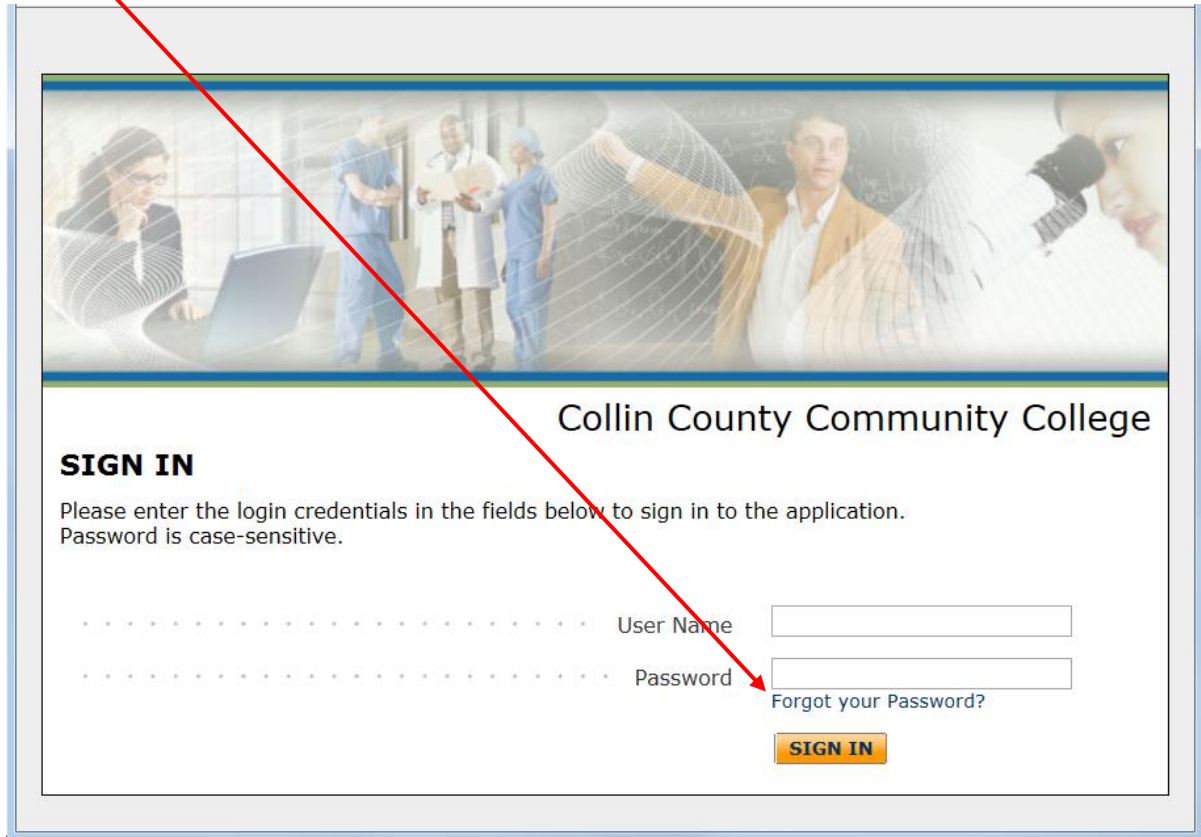
Password change complete.

8. Left mouse click on the yellow **Close** button.

Setting up CougarMart Security Question

Setting up your security question in your CougarMart Profile will allow you to utilize the [Forgot your Password?](#) link on the login page.

1. Login to CougarMart.



Collin County Community College

SIGN IN

Please enter the login credentials in the fields below to sign in to the application.
Password is case-sensitive.

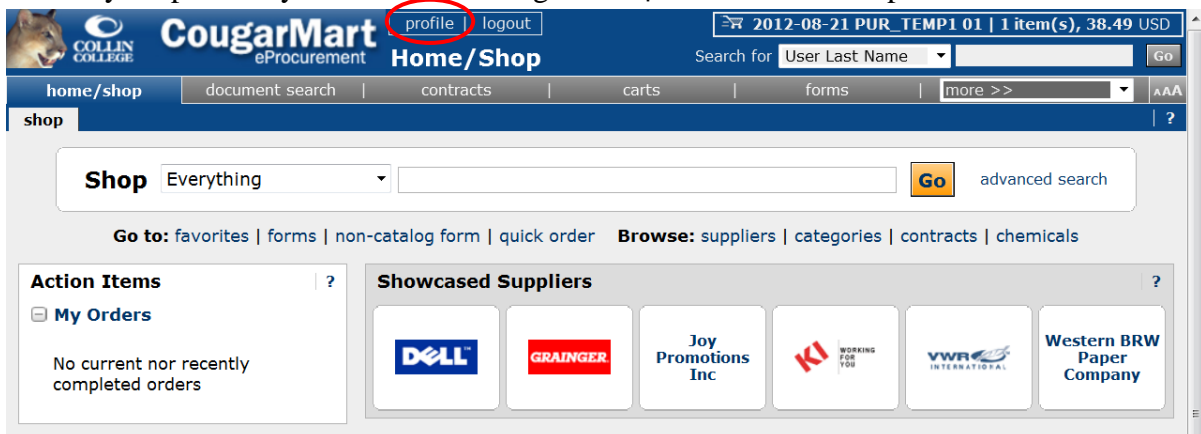
..... User Name

..... Password

[Forgot your Password?](#)

SIGN IN

2. Access your profile by left mouse clicking on the profile link at the top center of the screen.



CougarMart eProcurement **Home/Shop** [profile](#) [logout](#) 2012-08-21 PUR_TEMP1 01 | 1 item(s), 38.49 USD

Search for User Last Name **Go**

home/shop | document search | contracts | carts | forms | more >> AAA

shop | ?

Shop Everything **Go** advanced search

Go to: favorites | forms | non-catalog form | quick order **Browse:** suppliers | categories | contracts | chemicals

Action Items ?

My Orders

No current nor recently completed orders

Showcased Suppliers ?

DELL **GRAINGER** Joy Promotions Inc. **KI** WORKING FOR YOU **VWR** INTERNATIONAL **Western BRW Paper Company**

3. You have the option of choosing one of the five pre-defined questions from the Question drop down near the bottom of the window, or defining your own question.

The screenshot shows the 'My Profile' page in the CougarMart eProcurement system. The 'User Identification' tab is selected. The 'Question' dropdown menu is open, displaying the following options:

- What was the name of your elementary school?
- In what city or town was your first job?
- In what city does your nearest sibling live?
- What is the middle name of your oldest child?
- What street did you live on as a child?
- Define your own security question

4. You will need to enter an Answer then Confirm Answer.

The screenshot shows the 'My Profile' page in the CougarMart eProcurement system. The 'User Identification' tab is selected. The 'Question' dropdown menu is open, displaying the following options:

- What was the name of your elementary school?
- In what city or town was your first job?
- In what city does your nearest sibling live?
- What is the middle name of your oldest child?
- What street did you live on as a child?
- Define your own security question

5. Left mouse click on the **Save** button at the bottom center.

Resetting CougarMart Password

After you have set up your security question, you can reset your password if your account has been locked.

On your first and second invalid logins, you will get the following window.



Collin County Community College

SIGN IN

Please enter your user name and password below to access the application.
These fields are case-sensitive.

❌ Invalid login, please try again.

..... User Name

..... Password

[Forgot your Password?](#)

SIGN IN

On your third invalid login attempt, you will get the following window.



Collin County Community College

SIGN IN

Please enter your user name and password below to access the application.
These fields are case-sensitive.

❌ **Errors**

- Invalid login, please try again.
- Your user account has been locked. Please contact your administrator.

..... User Name

..... Password

[Forgot your Password?](#)

SIGN IN

Use the following instructions to reset your password:

1. Left mouse click on the [Forgot your Password?](#) link above the **SIGN IN** button.
2. Follow the displayed instructions.



Collin County Community College

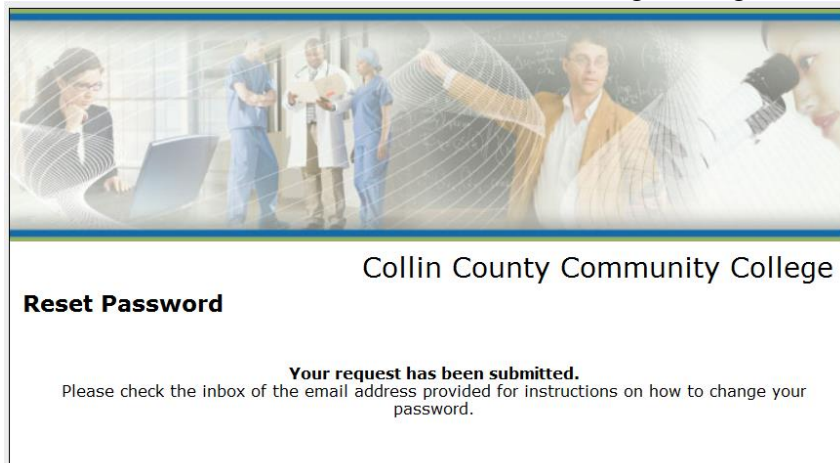
Reset Password

Please enter your user name and the email stored in your user profile. These are case sensitive. An email with instructions on how to change your password will be sent once the values entered are validated.

***** User Name

***** Email Address

3. Left mouse click on the **Go** button. The following message will be displayed.



Collin County Community College

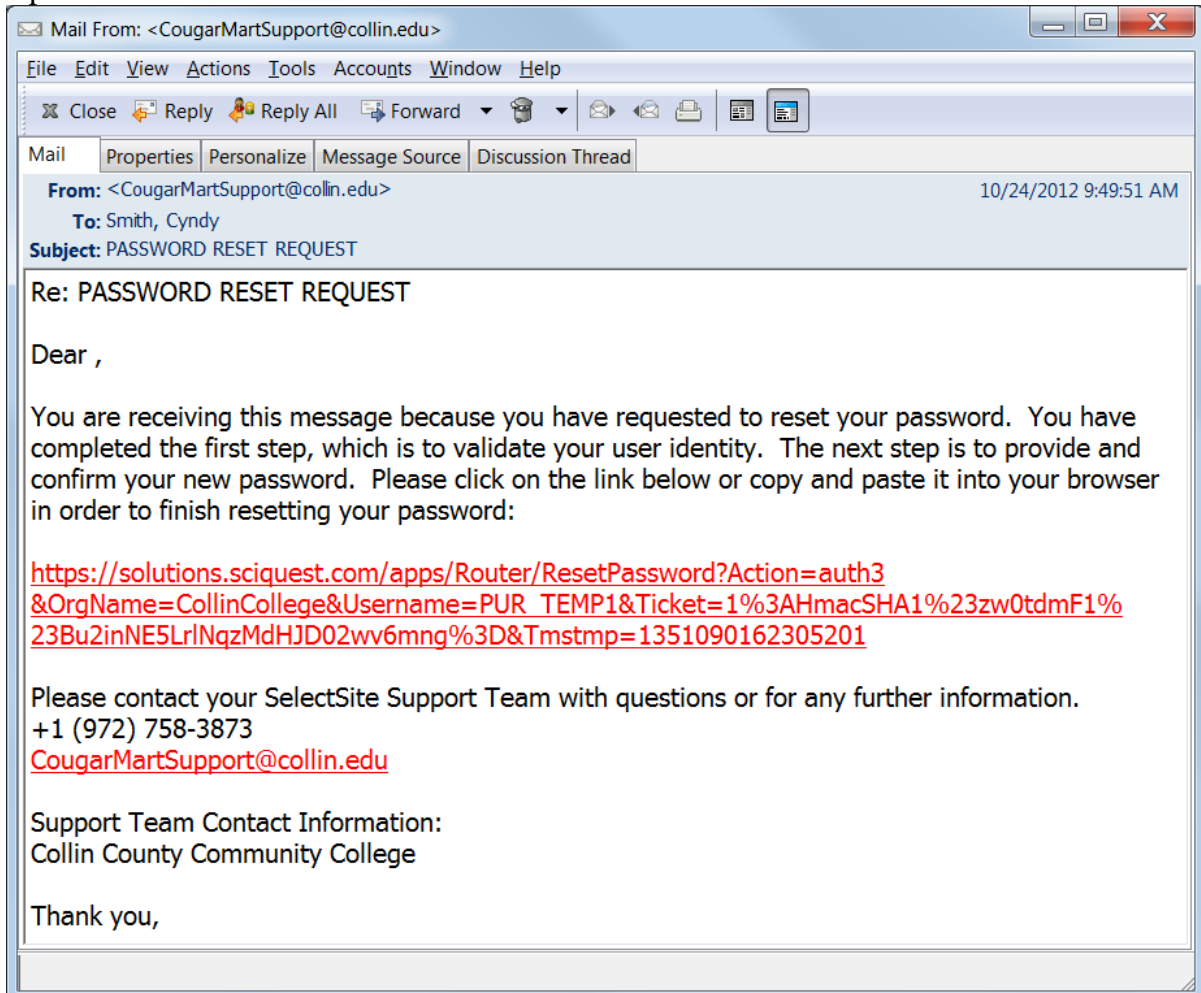
Reset Password

Your request has been submitted.

Please check the inbox of the email address provided for instructions on how to change your password.

4. You should receive an e-mail from CougarMartSupport@collin.edu with a subject of PASSWORD RESET REQUEST.

5. Open the e-mail and follow the instructions.



6. When the **Reset Password** window opens, enter the answer to your security question.

The screenshot shows the "Collin County Community College Reset Password" window. It has a header image showing people in a professional setting. Below the header, the title "Collin County Community College" is centered. The main heading is "Reset Password". Below it, the instruction says: "Please enter the answer to the security question entered in your profile." There are four input fields: "Security Question" (with a dropdown menu showing "What was the name of your elementary school?"), "Answer", "New Password", and "Retype New Password". A "Go" button is at the bottom right.

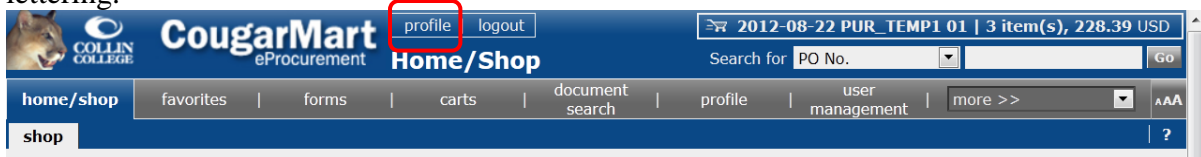
7. Enter your New Password and retype your New Password.
8. Left mouse click on the **Go** button.
9. You will be logged into CougarMart.

For further assistance, call Tere Beaty at extension 3873, or Cyndy smith at extension 3872, or e-mail CougarMartSupport@collin.edu.

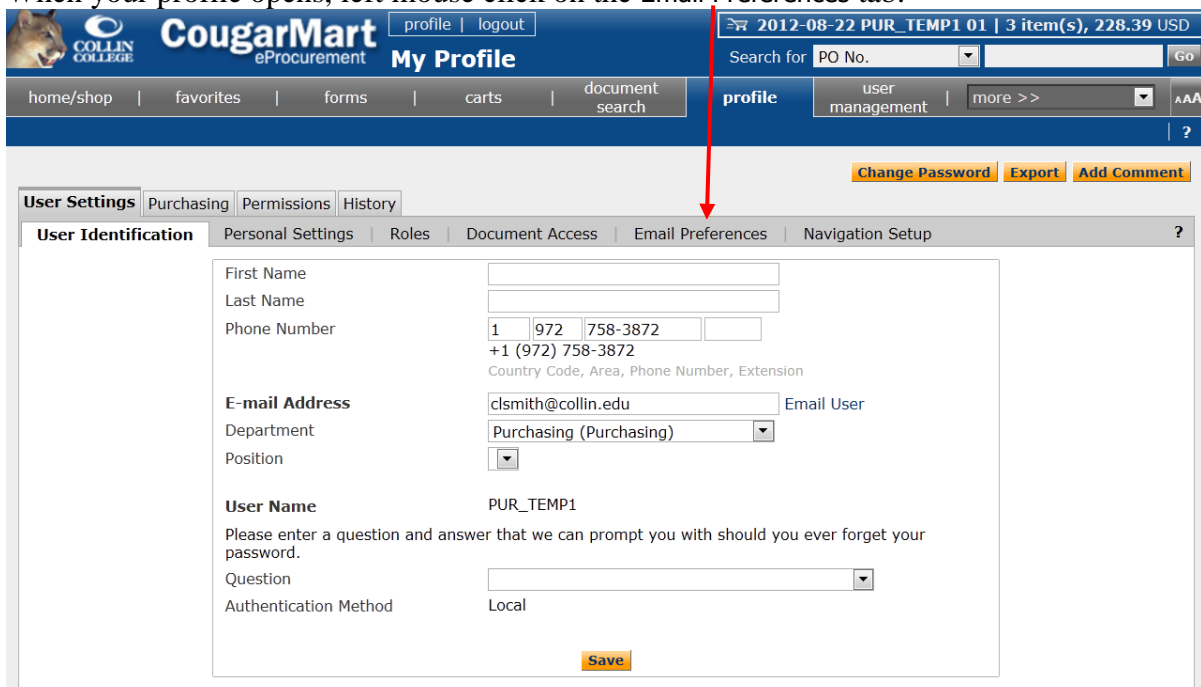
Turning Off Messages

Use the following steps to turn off the email preference to receive a message when a Purchase Order has been sent to a supplier:

1. Left mouse click on the profile link at the very top center of the window. It is in white lettering.



2. When your profile opens, left mouse click on the Email Preferences tab.



- Under **Purchase Orders** on the right, scroll down to the Email Preference PO sent to supplier and check the **Override Role** box.

User Settings | Purchasing | Permissions | History

User Identification | Personal Settings | Roles | Document Access | **Email Preferences** | Navigation Setup

Email Preference	Value	Override Role
Administration & Integration		
Search Result Export Confirmation	✓	<input type="checkbox"/>
PR Export Failure Notification	✗	<input type="checkbox"/>
Shopping, Carts & Requisitions		
Prepared By - Cart Assigned Notice	✗	<input type="checkbox"/>
Prepared By - PR line item(s) rejected	✗	<input type="checkbox"/>
Prepared By - PR rejected/returned	✗	<input type="checkbox"/>
Cart Assigned Notice	✓	<input type="checkbox"/>
Receive PR and PO notifications for Carts Assigned to Me	✗	<input type="checkbox"/>
Assigned Cart Processed	✗	<input type="checkbox"/>
Assigned Cart Deleted	✗	<input type="checkbox"/>
PR submitted into Workflow	✗	<input type="checkbox"/>
PR pending Workflow approval	✗	<input type="checkbox"/>
PR Workflow Notification available	✗	<input type="checkbox"/>
PR Workflow complete / PO created	✗	<input type="checkbox"/>
PR line item(s) rejected	✓	<input type="checkbox"/>
Cart/PR rejected/returned	✓	<input type="checkbox"/>

Email Preference	Value	Override Role
Purchase Orders		
Prepared By - PO Workflow complete	✗	<input type="checkbox"/>
Prepared By - PO sent to supplier	✗	<input type="checkbox"/>
Prepared By - PO line item(s) rejected	✗	<input type="checkbox"/>
Prepared By - PO rejected	✗	<input type="checkbox"/>
PO submitted into Workflow	✗	<input type="checkbox"/>
PO pending Workflow approval	✗	<input type="checkbox"/>
PO Workflow Notification available	✗	<input type="checkbox"/>
PO Workflow complete	✗	<input type="checkbox"/>
PO sent to supplier	✓	<input checked="" type="checkbox"/>
PO rejected	✗	<input type="checkbox"/>
PO line item Backorder notice	✗	<input type="checkbox"/>
PO line item Cancellation notice	✗	<input type="checkbox"/>
Settlement		
Prepared By - PO Requires Receipt notice	✗	<input type="checkbox"/>
PO Requires Receipt notice	✓	<input type="checkbox"/>
Contract Manager		
Contract Budget/Tier Notification	✗	<input type="checkbox"/>
Contract Date Notifications	✗	<input type="checkbox"/>

Save

- Left mouse click on the **Override Role Value** box.
- Left mouse click on the **Save** button at the bottom of the 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.

Creating an Open Purchase Order

- Open purchase orders should be evaluated annually to determine the amount spent with the vendor for the prior year. A current open purchase order should be issued for approximately that amount but cannot exceed \$2,500.00 except under special circumstances.
- The privilege of having open purchase orders is to allow you to get the items you need when you need them and should only be used for emergency purposes or many small dollar purchases anticipated for supplies throughout the year.
- For emergency purchases, where an open purchase order is not in place or the item is over \$300, follow the Emergency Purchases procedures described previously.
- Single item purchases of \$300 or greater should not be purchased through an open purchase order. The item should be entered on a requisition in CougarMart and a purchase order issued prior to making the purchase.
- Receipts must be sent to AP within 3 working days and must have the cost center manager's signature.
- The open purchase order number must be referenced on the receipt.

1. From the **home/shop** tab in the **Go to:** area, choose the **non-catalog form**.

The screenshot shows the CougarMart eProcurement interface. At the top, there's a header with the logo, navigation links (profile, logout), and a search bar. Below the header is a navigation bar with tabs: home/shop, favorites, forms, carts, document search, profile, user management, and more >>. The 'home/shop' tab is selected. Below the navigation bar is a 'Shop' section with a dropdown menu set to 'Everything' and a 'Go' button. Below the 'Shop' section is a 'Go to:' section with links: favorites, forms, non-catalog form (circled in red), quick order, Browse: suppliers, categories, contracts, chemicals. A red arrow points from the 'non-catalog form' link to the 'Shop' dropdown menu.

2. When the **Non-Catalog Form** opens, begin typing the supplier's name and a list to select from will appear, or use the **supplier search** link.

The screenshot shows the 'Non-Catalog Form' page in a web browser. The form is titled 'Non-Catalog Form' and has a URL bar showing 'https://solutions.sciquest.com/?&FavoriteProductId=1713141&wantReloadOnClose=1713141&callerScro'. The form is divided into several sections: 'Supplier Info' with a dropdown for 'Enter Supplier' showing a list of suppliers (Today's Electric Inc, Today's Staffing Inc); 'General Info' with a dropdown for 'Catalog No.' showing 'N/A'; 'Product Description' with a text area for 'The first line of the Product Description should be concise to assist Inventory Control. A maximum of 50 characters is fed into Banner. A more complete Product Description can be entered in the Notes field below that will be displayed in CougarMart. Quotes can be attached as either an Internal or External Notes and Attachment.'; 'Notes' with a text area for 'Notes'; 'Quantity' with a dropdown for 'Quantity' showing '6000'; 'Packaging (UOM)' with a dropdown for 'Packaging (UOM)' showing 'EA - Each'; 'Unit Cost' with a dropdown for 'Unit Cost' showing '1.00'; 'Product Size' with a dropdown for 'Product Size'; 'Manufacturer Name' with a text area for 'If Manufacturer Name is available, enter here.'; 'Manufacturer Part No' with a text area for 'If Manufacturer Part No is available, enter here.'; and 'UNSPSC' with a dropdown for 'UNSPSC'. The form also has a 'Total' field at the bottom right showing '0.00'.

3. Enter N/A in the **Catalog No.** field.
4. In the **Product Description** field, enter the words “Open Purchase Order,” not “Standing order” nor “Standing PO,” along with what the open purchase order is for, and include the names of Authorized Users.
5. Enter the dollar amount that you want on the Open Purchase Order in the **Quantity** field.*
6. Enter “1.00” in the **Unit Price** field.*

*Note: Reversing the figures that you enter in the **Quantity** and **Unit Price** fields will allow Accounts Payable to pay multiple invoices on the purchase order.

7. Continue the process of creating a requisition using the **Non-Catalog Form** instructions found on pages 9 thru 17 of this guide.
8. The Open Purchase Order’s Term of Contract should be entered in the **External Notes and Attachments**. This should be the term of the Open Purchase Order’s term, not the contract’s term. Typically, it ends in the current fiscal year and is formatted in this manner “Term of Contract: 9/1/2012 thru 8/31/2013.”
9. You will need to do a receiver for the entire amount of the purchase order after it is created so that Accounts Payable will be able to pay the invoices as they come in.

How to View the Balance/Transactions Against an Open Purchase Order

Method #1

Login to CougarWeb (<http://cougarweb.collin.edu/>).



1. Choose **Banner INB (PROD)** from the Banner Bookmarks channel.

CougarWeb

Welcome Cynthia L. Smith
You are currently logged in.

My Account
Content Layout

Groups Logout Help

August 9, 2013

Home Library Campus Life Finance My Workplace

Employment Details

- Benefits
- Direct Deposit
- Pay Stub
- Job Details
- Leave Details
- Employee Directory
- W2 Consent
- W2 Tax and Earnings Statement

Human Resources Links

- HR Website
 - Benefits Information
 - Board Policies
 - CougarHR - Employment Opportunities, Job Descriptions, Evaluations, Hiring
 - Employee Resources (Procedures & Guidelines)
 - HR Forms
 - Professional Development
 - Training Schedule
 - ePrint

eProcurement

- CougarMart
- CougarMart Training - electronic requisitioning training

Banner Bookmarks

- <http://banner.collin.edu> Includes links for Banner Systems (PROD & Test) and Documentation
- Banner INB (PROD)**
- Banner INB (DANZ)
- Banner INB (DEV 10g)
- Banner INB (SBOX)

LCMS Editor Resources

- Site Studio Login
- How-to Guides
- Web Content (LCMS) Online Forms
- Downloads

GroupWise Web Access

- View your Groupwise Webmail

Intranet Links

- Emergency Response Plan
- Pandemic Response Plan
- CougarAlert Emergency System
- Refer information of concern (SOBI)
- Student Incident Report
- Advisory Committee Handbook
- Faculty Handbook / Associate Faculty Handbook
- All College Council
- Argos Report Forms and Status
- Calendars, Master and Academic
- Committees, Task Forces & Activities
- Bookstore
- Internal Auditor
- Business Administrative Services
 - Budget Development
 - Purchasing
- Career Coach
- Counseling Services: Online Screening

Reporting - Enrollment

Banner Reporting

2. Choose **PRODUCTION INB**.

COLLIN COLLEGE

Production Internet Native Banner (INB)

- [PRODUCTION INB](#)

INB and SSB Test Instances

- [SBOX INB | SSB](#)
- [DANZ INB | SSB](#)
- [DEV10g INB | SSB](#)

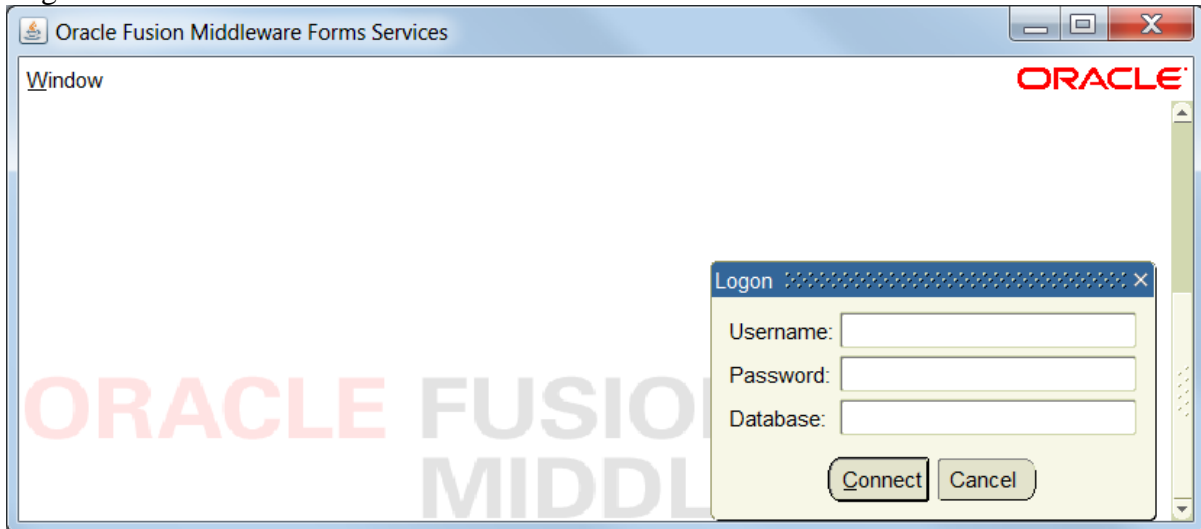
CougarWeb

Contact the Help Desk at
972.548.6555 or via email at
helpdesk@collin.edu.

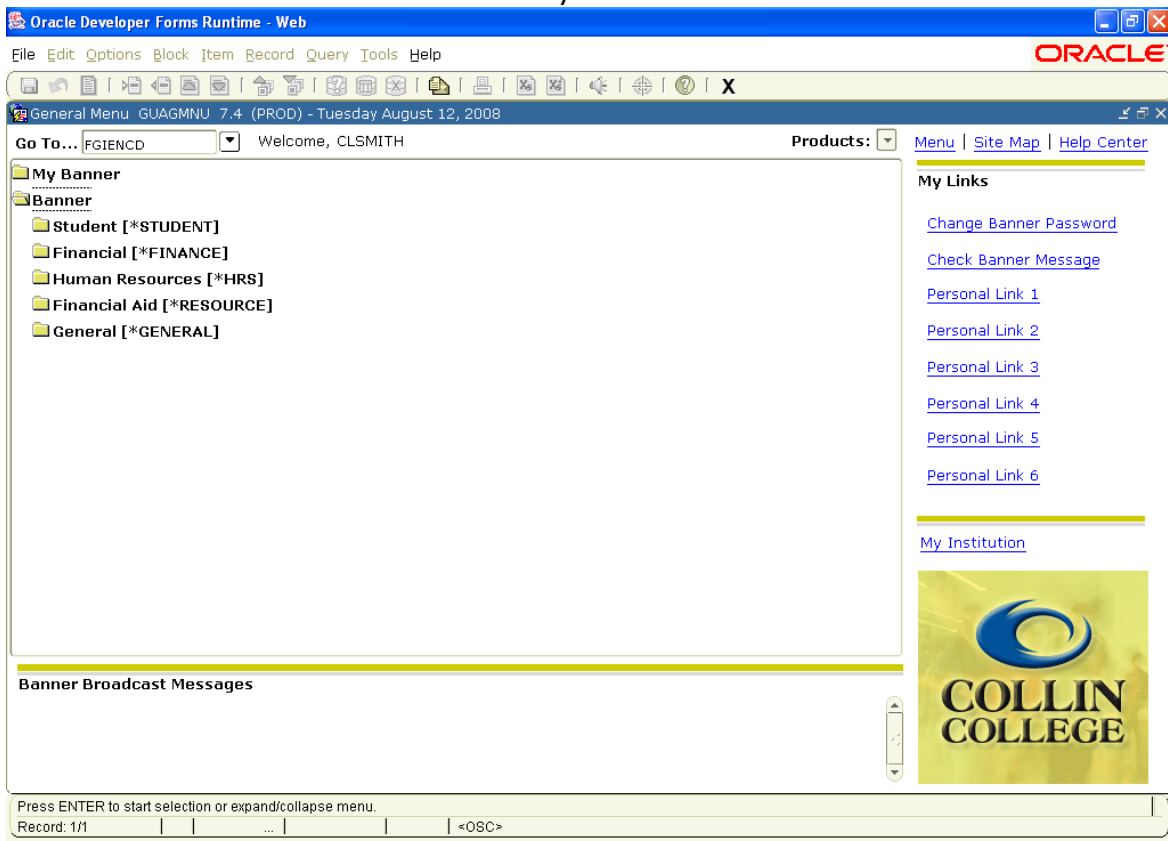
Banner Documentation

- [Banner Documentation Bookshelf 8.x](#)

3. Login.



4. Enter FGIENCD Detail Encumbrance Activity in the Go To... field.



5. Enter.



6. In the **Encumbrance** field, enter the number of the open purchase order beginning with a "P".

Oracle Fusion Middleware Forms Services: Open > FGIENCD

File Edit Options Block Item Record Query Tools Help

Detail Encumbrance Activity FGIENCD 8.3 (PROD)

Encumbrance: P0019480 Encumbrance Period: All

7. Next Block.

8. The Balance of the Open Purchase Order will be displayed followed by the transactions. Scroll as necessary to review all transactions.

Oracle Fusion Middleware Forms Services: Open > FGIENCD

File Edit Options Block Item Record Query Tools Help

Detail Encumbrance Activity FGIENCD 8.3 (PROD)

Encumbrance: P0019480 Encumbrance Period: All

Description: Grainger Status: C Type: P

Date Established: 18-JAN-2013 Balance: 0.00 Vendor: 100002391 Grainger

Item: 1 N/A-Open purchase order for maintenance supplies a

Sequence: 1 Fiscal Year: 13 Status: C Commit Indicator: U

COA Index Fund Orgn Acct Prog Actv Locn Proj

C 280307 110010 280307 733470 40

Encumbrance: 2,500.00 Liquidation: -2,500.00 Balance: 0.00

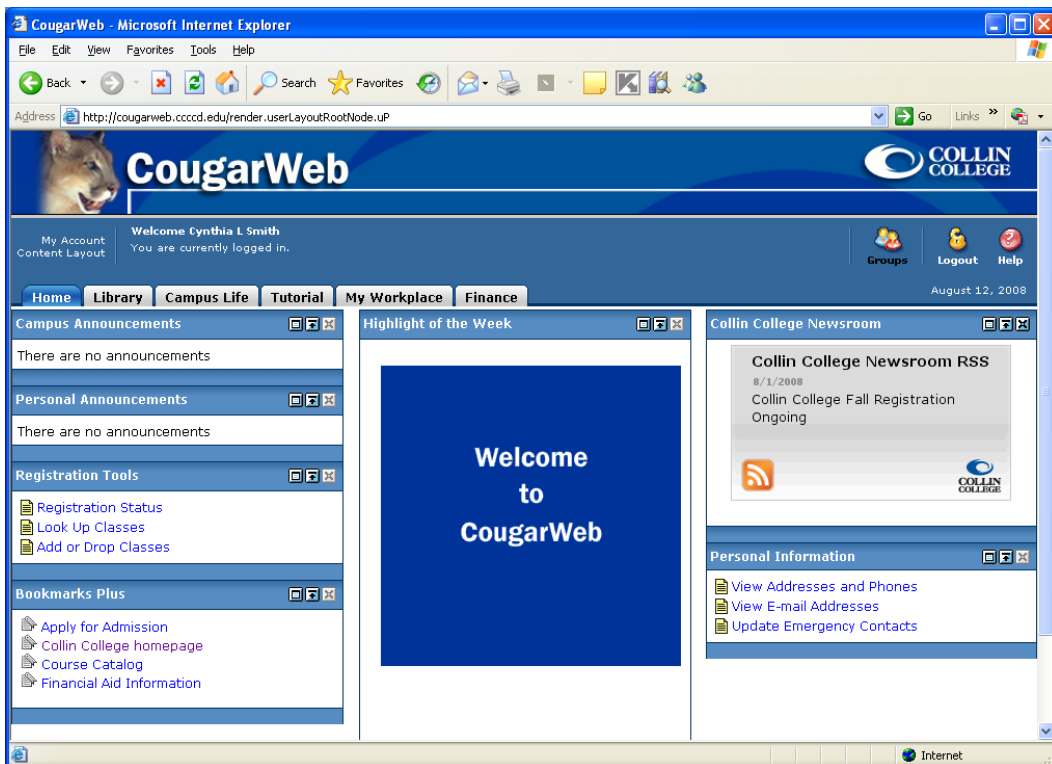
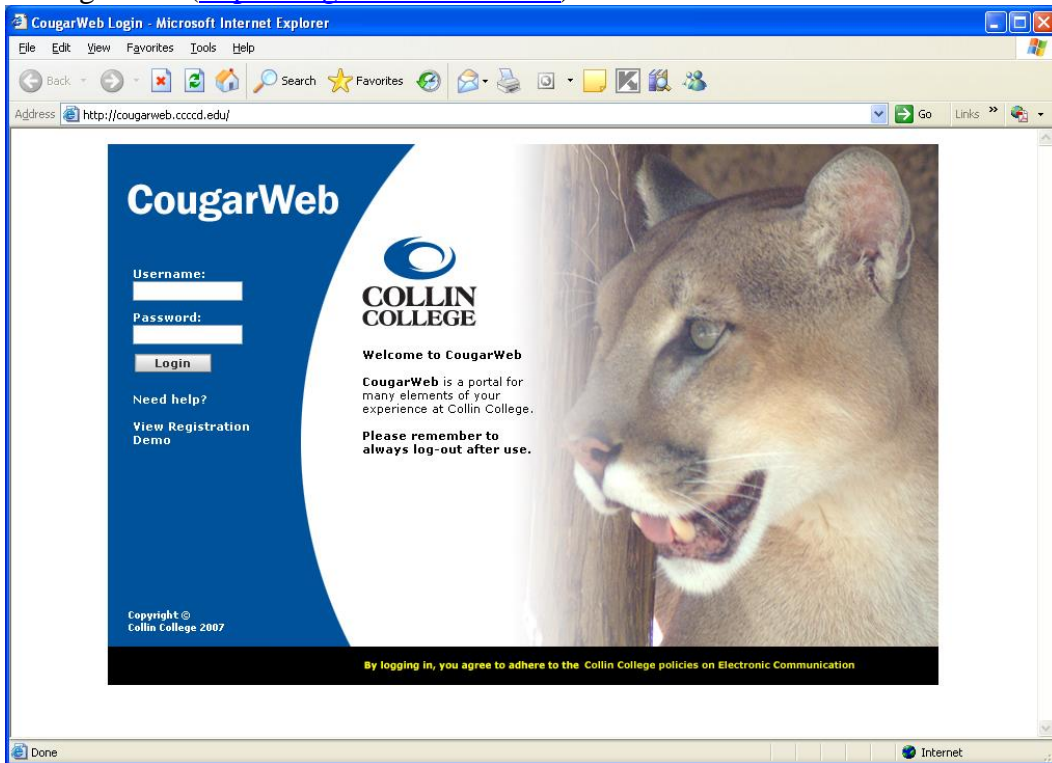
Transaction Date	Type	Document Code	Action	Transaction Amount	Remaining Balance
18-JAN-2013	PORD	P0019480		1,500.00	1,500.00
01-FEB-2013	INEI	0148327		-269.10	1,230.90
19-FEB-2013	INEI	0150375		-950.72	280.18
18-MAR-2013	INEC	0152050		509.24	789.42
18-MAR-2013	INEI	0152049		-509.24	280.18
18-MAR-2013	INEI	0152052		-113.28	166.90
03-APR-2013	INEI	0153068		-126.14	40.76
23-APR-2013	CORD	P0019480		1,000.00	1,040.76

Press Next Record or Previous Record to scroll accounting/transaction details



Record: 1/1 ... <OSC>

Method #2

Login to CougarWeb (<http://cougarweb.collin.edu/>).



1. Left mouse click on the Finance tab.
2. Left mouse click on the Encumbrance Query link under Finance Quicklinks.


CougarWeb


My Account
Content Layout
Welcome Cynthia L Smith
You are currently logged in.
Groups Logout Help

Home Library Campus Life **Finance** My Workplace
August 9, 2013

eProcurement

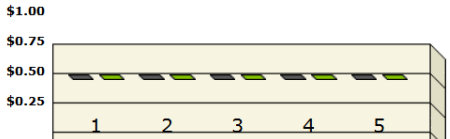
- CougarMart
- CougarMart Training - electronic requisitioning training

Finance Quicklinks

- Budget Queries
- Encumbrance Query
- Approve Documents
- View Document
- Budget Adjustment
- Multiple Line Budget Adjustment
- Budget Development
- Business Office
- Accounting
- Purchasing

Approval Alerts

You have no documents pending approval

Financial Advisor


Legend	Fund	Orgn	Adjusted Budget	YTD Activity / Commitments	Available Balance	Percent Spent	Percent Available
1			0.00	0.00	0.00		
2			0.00	0.00	0.00		
3			0.00	0.00	0.00		
4			0.00	0.00	0.00		
5			0.00	0.00	0.00		

eProcurement

- CougarMart
- CougarMart Training - electronic requisitioning training

3. Select the Fiscal year.

CougarWeb COLLIN COLLEGE

Back to Finance Tab

Groups Support Help

Personal Information Student Employee **Finance**

Search Go MENU SITE MAP HELP

Encumbrance Query

Choose an existing query and select Retrieve Query or create a new query. Select Submit Query to display the query results. For an Encumbrance Query to be successful, you must enter a value in the Organization Field or the Grant Field.

Existing Query Retrieve Query

Fiscal year Fiscal period

Encumbrance Status

Commitment Type

Chart of Accounts Index

Fund Activity

Organization Location

Grant Fund Type

Account Account Type

Program

Save Query as:

☐ Shared

Submit Query

[[Budget Queries](#) | [Encumbrance Query](#) | [Requisition](#) | [Purchase Order](#) | [Approve Documents](#) | [View Document](#) | [Budget Transfer](#) |]

4. Enter the Fiscal period. The Fiscal period is 1 thru 14 with 1 being the first period (month of the fiscal year) which is September and 12 being August.
5. Enter the Encumbrance Status (Open, Closed, All).
6. Enter the Commitment Type (All, Committed, Uncommitted).
7. Enter the Chart of Accounts (C).
8. Enter the six-digit Fund number (optional).
9. Enter your six-digit Organization number (used to be your cost center number).
10. Enter the six-digit Account number that you want to query. (Hint: It should start with 7#####.)
11. Enter the two-digit Program number (optional).
12. Click on the Submit Query button. This will open a window listing all of your purchase orders for that Organization and Account.

- You can left mouse click on the purchase order hyperlink to see all of the transactions against this open purchase order.

CougarWeb COLLIN COLLEGE

Personal Information Student Employee Finance

Search Go MENU SITE MAP HELP

Select the Document Number link or the Document Code link to display the entire document.

Selected Document
Encumbrance Detail Status Report
 By Document, Account Distribution
 Period Ending Aug 31, 2013
 As of Aug 09, 2013

Chart of Accounts C Collin County Community College Dst Commitment Type Uncommitted
 Document Number [P0018253](#) Document Date Sep 11, 2012
 Transaction Description Texas Press Clipping Bureau

Document Code	Rule Class Code	Original Encumbrance	Encumbrance Adjustments	Encumbrance Liquidations	Year to Date	Item Number	Sequence Number	Fund	Organization Account	Program Activity	Location
I0141070	INEI	0.00	0.00	(221.68)	0.00	1	1	110010 230105	712370 35		
I0147060	INEI	0.00	0.00	(181.45)	0.00	1	1	110010 230105	712370 35		
I0145221	INEI	0.00	0.00	0.00	261.91	1	1	110010 230105	712370 35		
I0147060	INEI	0.00	0.00	0.00	181.45	1	1	110010 230105	712370 35		
I0155849	INEI	0.00	0.00	0.00	276.81	1	1	110010 230105	712370 35		
I0145221	INEI	0.00	0.00	(261.91)	0.00	1	1	110010 230105	712370 35		
I0151639	INEI	0.00	0.00	(287.24)	0.00	1	1	110010 230105	712370 35		
I0157688	INEI	0.00	0.00	0.00	270.85	1	1	110010 230105	712370 35		
I0157688	INEI	0.00	0.00	(270.85)	0.00	1	1	110010 230105	712370 35		
I0151639	INEI	0.00	0.00	0.00	287.24	1	1	110010 230105	712370 35		
I0143037	INEI	0.00	0.00	(321.51)	0.00	1	1	110010 230105	712370 35		
I0153927	INEI	0.00	0.00	(281.28)	0.00	1	1	110010 230105	712370 35		
I0155849	INEI	0.00	0.00	(276.81)	0.00	1	1	110010 230105	712370 35		
I0141070	INEI	0.00	0.00	0.00	221.68	1	1	110010 230105	712370 35		
I0153927	INEI	0.00	0.00	0.00	281.28	1	1	110010 230105	712370 35		

Next 15 >

Another Query

- If there are more than 15 transactions for this record, a Next 15> button will be displayed at the bottom. Click on this button to see more transactions.

Searching for Supplier Information

- From the home/shop tab, select Supplier Profile in the first Search for field and type in the supplier name in the second Search for field, then click Go.
- Left mouse click on the supplier name.

CougarMart eProcurement suppliers

profile | logout

2013-03-14 PUR_TEMP 01 | 1 item(s), 20.83 USD

Search for Supplier Profile Go

home/shop | document search | contracts | carts | forms | supplier management

suppliers

Search Home Depot Go Advanced search

Enter search terms such as Legal Company Name or Supplier ID.

Showing 1 - 1 of 1 results

Results per page 20 Sort by: Best Match Page 1 of 1 legend ?

Active	Legal Company Name (DBA)	Type	Preferences
✓	Home Depot Credit Services		

- Left mouse click on the Fulfillment Addresses tab.

CougarMart eProcurement | profile | logout | 2013-03-14 PUR_TEMP1 01 | 1 item(s), 20.83 USD

Supplier Profile - Home Depot Credit Services

home/shop | document search | contracts | carts | forms | **supplier management** | AAA

suppliers ?

Supplier **Home Depot Credit Services**

Summary | General | Contacts | **Fulfillment Addresses** | Remittance Addresses | Item/Price | Showcase/Classes | Integrations | Price File Approvers | History ?

General Supplier Info		Default Ordering Info	
Supplier Name	Home Depot Credit Services	Order Distribution	Fax +1 (972) 569-6782
Supplier ID	13445278	Payment Method	Purchase Order
Supplier Number	100002440	Addresses	
Active	✓	Ordering Address	Phone Number +1 (972) 569-6784
Order Acknowledgement	✗		Fax Number +1 (972) 569-6782
Advanced Ship Notice	✗		Address Acct #6035 3225
e-Invoicing	✗		0388 1439
Contacts			1515 N Central
Darryl Tieken	Contact Type Technical Contact		Expy
	Phone Number		McKinney, TX
	Toll-free Phone Number		75070
	Fax Number		US
	Email Darryl_Tieken@homedepot.com	Remittance Address	Address PO Box 183176
Richard Nyberg	Contact Type Technical Contact		Dept 32-2503881439
	Phone Number		Columbus, OH 43218-3176
			US

- If there are multiple fulfillment addresses for the vendor, they will show in the **Addresses** field on the left hand side. In the screen shot below, it shows that Home Depot Credit Services has seven (7) business addresses. The default address will be highlighted and detail for that address will be shown on the right hand side of the screen.
- To see detail for the other business addresses, click on one of the other addresses and the details will show on the right hand side of the screen. Continue viewing the detail of the various addresses until you find the one you are looking for.

CougarMart eProcurement | profile | logout | 2013-03-14 PUR_TEMP1 01 | 1 item(s), 20.83 USD

Supplier Profile - Home Depot Credit Services

home/shop | document search | contracts | carts | forms | **supplier management** | AAA

suppliers ?

Supplier **Home Depot Credit Services**

Summary | General | Contacts | **Fulfillment Addresses** | Remittance Addresses | Item/Price | Showcase/Classes | Integrations | Price File Approvers | History ?

New Address

Addresses

Default Settings for this Supplier

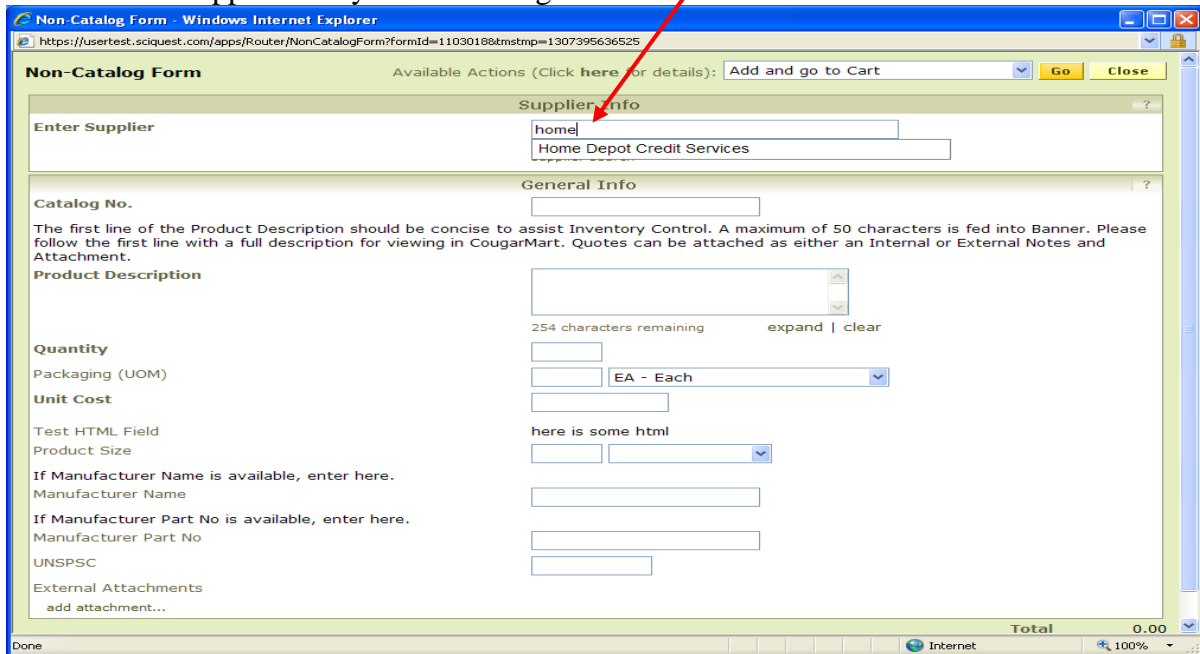
- Business 1
- Business 2**
- Business 3
- Business 4
- Business 5
- Business 6
- Business 7

General | Contacts | Ordering | History ?

General		Override Default Values
Name	Business 2	<input checked="" type="checkbox"/>
Address ID	Business 2	<input checked="" type="checkbox"/>
3rd Party Address ID		<input type="checkbox"/>
Active	✓	<input checked="" type="checkbox"/>
Primary Address (used as default in application)	✓	<input checked="" type="checkbox"/>
Current Primary Address	Business 2	
Remit To Address	Vendor/Remit To 1	<input type="checkbox"/>

Selecting a Different Fulfillment Address for a Supplier

1. In the **Non-Catalog Form**, you can begin to type the supplier name in the **Enter Supplier** field and select the supplier that you are looking for.



Non-Catalog Form - Windows Internet Explorer

Available Actions (Click here for details): Add and go to Cart Go Close

Supplier Info

Enter Supplier home Home Depot Credit Services

General Info

Catalog No.

The first line of the Product Description should be concise to assist Inventory Control. A maximum of 50 characters is fed into Banner. Please follow the first line with a full description for viewing in CougarMart. Quotes can be attached as either an Internal or External Notes and Attachment.

Product Description

254 characters remaining expand | clear

Quantity

Packaging (UOM) EA - Each

Unit Cost

Test HTML Field here is some html

Product Size

If Manufacturer Name is available, enter here.

Manufacturer Name

If Manufacturer Part No is available, enter here.

Manufacturer Part No

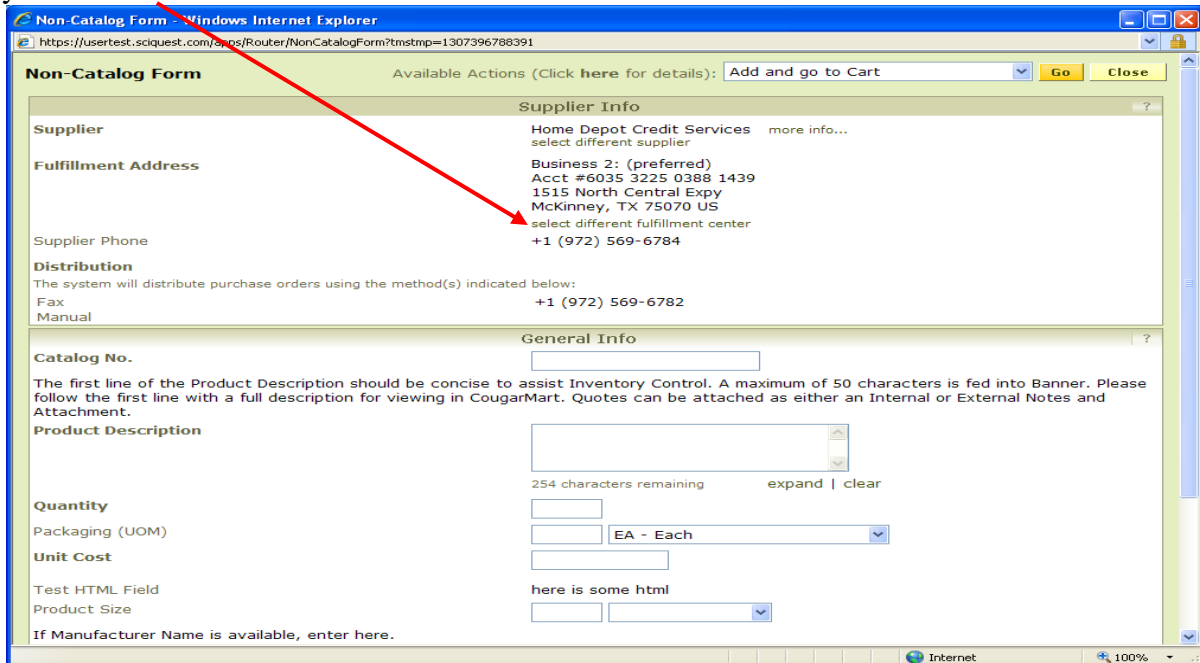
UNSPSC

External Attachments

add attachment...

Total 0.00

2. The supplier information will populate into the form. If the default address is not the address you need then use the select different fulfillment center link to choose the correct address.



Non-Catalog Form - Windows Internet Explorer

Available Actions (Click here for details): Add and go to Cart Go Close

Supplier Info

Supplier Home Depot Credit Services select different supplier more info...

Fulfillment Address Business 2: (preferred) Acct #6035 3225 0388 1439 1515 North Central Expy McKinney, TX 75070 US select different fulfillment center

Supplier Phone +1 (972) 569-6784

Distribution

The system will distribute purchase orders using the method(s) indicated below:

Fax +1 (972) 569-6782

Manual

General Info

Catalog No.

The first line of the Product Description should be concise to assist Inventory Control. A maximum of 50 characters is fed into Banner. Please follow the first line with a full description for viewing in CougarMart. Quotes can be attached as either an Internal or External Notes and Attachment.

Product Description

254 characters remaining expand | clear

Quantity

Packaging (UOM) EA - Each

Unit Cost

Test HTML Field here is some html

Product Size

If Manufacturer Name is available, enter here.

3. A list of all of the fulfillment addresses for that supplier will open. Left mouse click on the **Select** button next to the address that you want to choose. The address selected will populate into the form.

Results per page 20 Suppliers found: 1 Page 1 of 1

Supplier Name/Address	Select
Home Depot Credit Services	
Business 1: PO Box 6031 The Lakes, NV 88901-6031 US	Select
Business 2: Acct #6035 3225 0388 1439 1515 North Central Expy McKinney, TX 75070 US	Select
Business 3: Acct #6035 3225 0388 1439 4600 State Hwy 121 Plano, TX 75024 US	Select
Business 4: Acct #6035 3225 0388 1439 1224 N Central Expy Plano, TX 75074 US	Select
Business 5: 6200 W Park Blvd Plano, TX 75093 US	Select
Business 6: 909 McDermott Dr Allen, TX 75013 US	Select
Business 7: 1801 Parker Rd Plano, TX 75023 US	Select

4. You can also left mouse click on the supplier search link under the **Enter Supplier** field.

Non-Catalog Form Available Actions (Click here for details): Add and go to Cart Go Close

Supplier Info

Enter Supplier or supplier search

General Info

Catalog No.

The first line of the Product Description should be concise to assist Inventory Control. A maximum of 50 characters is fed into Banner. Please follow the first line with a full description for viewing in CougarMart. Quotes can be attached as either an Internal or External Notes and Attachment.

Product Description

254 characters remaining expand | clear

Quantity

Packaging (UOM) EA - Each

Unit Cost

Test HTML Field here is some html

Product Size

If Manufacturer Name is available, enter here. Manufacturer Name

If Manufacturer Part No is available, enter here. Manufacturer Part No

UNSPSC

External Attachments add attachment...

Total 0.00

5. Type the supplier name in the Supplier field and left mouse click on the **Search** button.

Supplier Search

Supplier: home

Results per page: 20

Search Cancel

6. The list of fulfillment addresses for the supplier will open up, and you can left mouse click on Select to choose the desired address.

Supplier Search

Supplier: home

Results per page: 20

Search Cancel

Results per page: 20 Suppliers found: 1 Page 1 of 1

Supplier Name/Address	Select
Home Depot Credit Services	
Business 1: PO Box 6031 The Lakes, NV 88901-6031 US	Select
Business 2: Acct #6035 3225 0388 1439 1515 North Central Expy McKinney, TX 75070 US	Select
Business 3: Acct #6035 3225 0388 1439 4600 State Hwy 121 Plano, TX 75024 US	Select
Business 4: Acct #6035 3225 0388 1439 1224 N Central Expy Plano, TX 75074 US	Select
Business 5: 6200 W Park Blvd Plano, TX 75093 US	Select
Business 6: 909 McDermott Dr Allen, TX 75013 US	Select
Business 7: 1801 Parker Rd Plano, TX 75023 US	Select

Creating a New Fiscal Year Order in the Current Fiscal Year

1. After creating your cart, left mouse click on **Proceed to Checkout** button.

CougarMart eProcurement | profile | logout | 2013-03-14 PUR_TEMP1 01 | 1 item(s), 20.83 USD

Cart - 37881531 - Draft Requisition

home/shop | document search | contracts | **carts** | forms | more >>

active cart | draft carts | favorites | my requisitions

Shopping Cart for PUR_TEMP1 | Continue Shopping

Name this cart: 2013-03-14 PUR_TEMP1 01

1 Item(s) for a total of **20.83 USD**
 subtotal: 20.83 USD
 estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

Have you made changes? **Update** | Help | Empty cart | Perform an action on (0 items selected)... | Select All

Moore Medical LLC more info...

Product Description	Unit Price	Quantity	Total
Item added on Mar 14, 2013 Hypodermic Syringe, Luer Lock Tip, clear syringe barrel, sterile, 20cc, 50/box Add to Favorites Remove More Actions Part Number 84127 Contract 3268-3 more info... Annual Contract for Medical Supplies for Health Sc...	20.83 USD BX	1	20.83 USD

2. Address all required fields as indicated by this warning symbol: ⚠.
3. Once the required fields are completed, click on the **Summary** tab, which is under the **Requisition** tab.
4. Left mouse click on **edit** button located in the General section.

CougarMart eProcurement | profile | logout | 2013-03-14 PUR_TEMP1 01 | 1 item(s), 20.83 USD

Summary - 37881531 - Draft Requisition

home/shop | document search | contracts | **carts** | forms | more >>

active cart | draft carts | favorites | my requisitions

General Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments Purchasing Use Only Terms and Conditions **Final Review**

Return to shopping cart | Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.
 Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition | PR Approvals | PO Preview | Comments | Attachments | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info | Taxes/S&H

Hide header | Hide value descriptions

General		Shipping	Billing
Cart Name	2013-03-14 PUR_TEMP1 01 edit	Ship To edit	Bill To edit
Accounting Date	no value	Attn: Cyndy Smith	Accounts Payable
Description	no value	Room: 360	PO Box 8021
Priority	Normal	Central Receiving	McKinney, TX 75070
Prepared by	PUR_TEMP1	3452 Spur 399	United States
Prepared for	PUR_TEMP1	McKinney, TX 75069	
Department	Purchasing (Purchasing)	United States	
		Delivery Options edit	
		Req Delivery 3/28/2013	

View/edit by line item...

- A pop up window will open after you click on the **edit** button. Enter **09/01/2013** in the Accounting Date field, enter “FY14 Classroom Supplies” or “FY14 Classroom Equipment” in the “Description” field and then left mouse click on **Save** button.

CougarMart eProcurement | profile | logout | 2013-03-14 PUR_TEMP1 01 | 1 item(s), 20.83 USD

Summary - 37881531 - Draft Requisition

home/shop | document search | contracts | **drafts** | forms | more >>

active cart | draft carts | favorites | my requisitions

General Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments Purchasing Use Only Terms and Conditions **Final Review**

Return to shopping cart | Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.

Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition Summary Shipping Billing Accounting Codes Supplier Info Taxes/S&H

General

Cart Name: 2013-03-14 PUR_TEMP1 01

Accounting Date: 09/02/2013

Description: FY14 Classroom Supplies

Priority: Normal

Prepared by: PUR_TEMP1

Prepared for: PUR_TEMP1

Department: Purchasing (Purchasing)

Save **Cancel**

Shipping

Ship To: Attn: Cyndy Smith, Room: 360, Central Receiving, 3452 Spur 399, McKinney, TX 75069, United States

Delivery Options

Req Delivery: 3/28/2013

Billing

Bill To: Accounts Payable, PO Box 8021, McKinney, TX 75070, United States

- After you save the information on the **General** section, leave the cart in the cart stage until July 1st for classroom supplies or September 1st for other orders. See next page for rules related to submitting new fiscal year orders for more information.
- Left mouse click on the **edit** button beside **Delivery Options** on the **Shipping** tab to change the Req Delivery (Date) to 8/1/2013 then left mouse click on the **Save** button.

Requisition Summary Shipping Billing Accounting Codes Supplier Info Taxes/S&H

General

Cart Name: 2013-03-14 PUR_TEMP1 01

Accounting Date: 9/2/2013

Description: FY14 Classroom Supplies

Priority: Normal

Prepared by: PUR_TEMP1

Prepared for: PUR_TEMP1

Department: Purchasing (Purchasing)

Shipping

Ship To: Attn: Cyndy Smith, Room: 360, Central Receiving, 3452 Spur 399, McKinney, TX 75069, United States

Delivery Options

Req Delivery: 3/28/2013

Delivery Options

Req Delivery: 3/28/2013

Save **Cancel**

Billing

Bill To: Accounts Payable, PO Box 8021, McKinney, TX 75070, United States

REQUISITIONS FOR THE NEXT FISCAL YEAR WILL BE PROCESSED AS FOLLOWS:

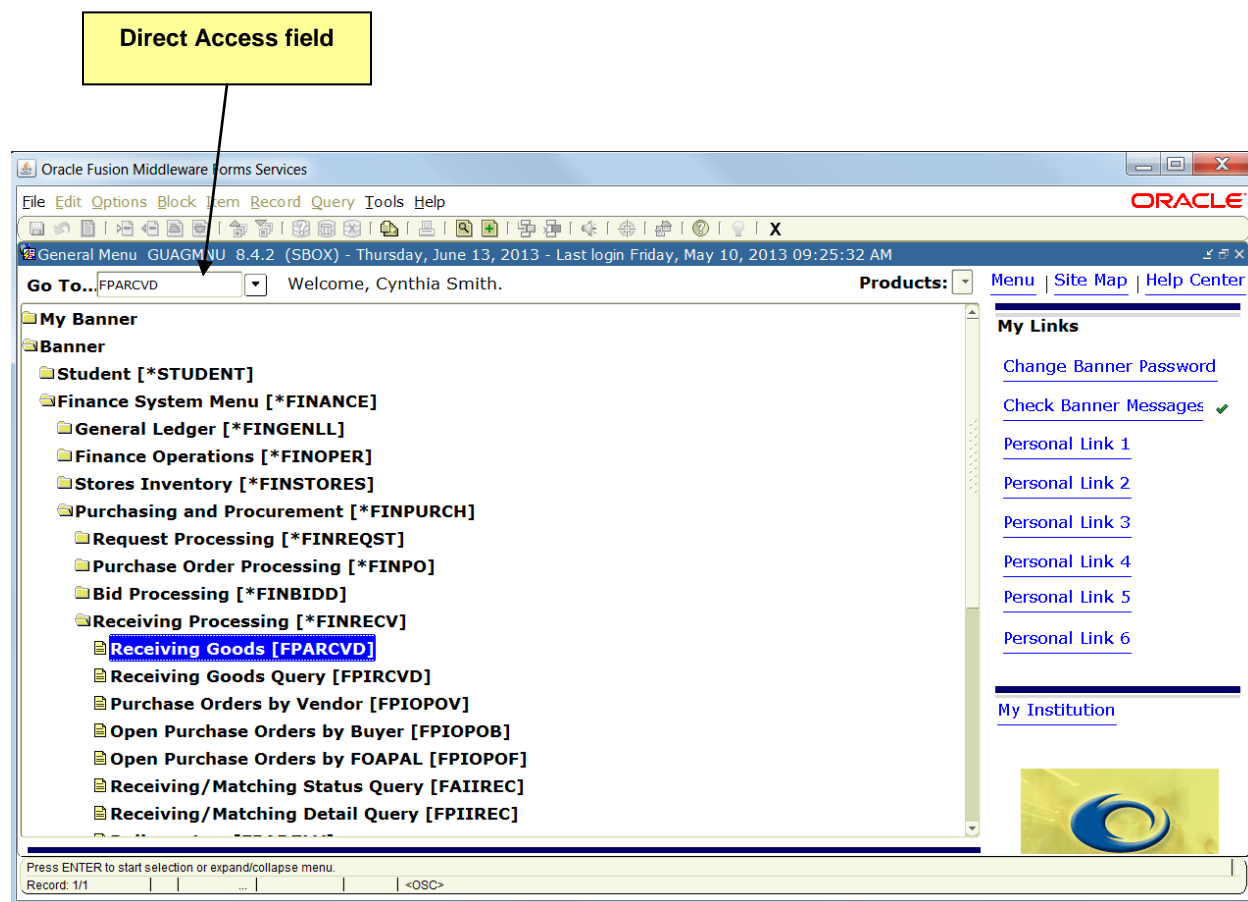
- Requisitions for the next fiscal year will not be processed until July 1st (or after) of the current fiscal year.
- Carts, for classroom supplies only, can be created beginning May 1st of each fiscal year and kept in the Cart stage until July 1st. On July 1st, you can click on **Proceed to Checkout** to submit your orders that need to be processed for delivery prior to the beginning of the fall semester. They should have an Accounting Date (shown in the General section of the Requisition **Summary**) after September 1st. The delivery date for requisitions in CougarMart automatically defaults to 14 days after the date the draft cart is created. For classroom supply orders placed in July, the delivery date *must* be changed to August 1st or after. Choose CougarMart Clause 248 that states "*** Do NOT deliver before August 1, 20YY.***" (See step 35 on page 18 for instructions on selecting and saving a document level clause.) Only orders for classroom supplies for the next fiscal year will be processed prior to September 1st. A best practice would be to name your cart starting with the FY designation so that you will know which carts are for the new fiscal year.
- If you have created a Cart(s) for next fiscal year and need to order items using the current fiscal year funds, be sure and add the items for the current year order to a new cart. Remember, when you have an active cart and start the shopping process in CougarMart, any items you select to Add to Cart will automatically go into the active cart.
- If you are creating a cart for next fiscal year and are ordering from one of the “punch-out” suppliers (i.e. Dell, Fastenal, Grainger, Joy Promotions, KI, Plano Office Supply, Western BRW Paper Co., or VWR) you are advised to wait until closer to the date that the order can be placed, such as 8/1/20YY, as the items or item prices could possibly change if held too long.
- All requisitions for the next fiscal year that are created prior to September 1st must have an Accounting Date (Transaction Date) within the month of September. September will be the only month that is open prior to the fiscal year beginning; therefore, you will not be able to use a Transaction Date that is not in the month of September. Unlike Banner, if you forget to put the 09/01/20YY date, it can be changed up until a purchase order is issued.
- You cannot **Proceed to Checkout** for any carts for items other than classroom supplies prior to September 1st. You can create your Cart with the 09/01/20YY Accounting Date, but should not click on the **Proceed to Checkout** button until 09/01/20YY. Again, these orders will not be processed until September 1st or after.
- All orders created for the next fiscal year will be in suspense until the budget is approved by the Board of Trustees and loaded into Banner.

Receiving: Receiving Goods FPARCVD Form in Banner

The **Receiving Goods Form (FPARCVD)** is used to log in goods or services received as the result of a previously processed **purchase order**. In order for Accounts Payable to process a check for a vendor, a receiver document must be completed on **FPARCVD** for each Regular Purchase Order. Open Purchase Orders in CougarMart require a receiver for the entire amount of the purchase order after it is created so that Accounts Payable will be able to pay the invoices as they come in.

Quick Tip

The most direct method of accessing the **Receiving Goods Form** is to enter **FPARCVD** in the Direct Access field (**Go To...**) on the Banner Main Menu and press Enter.



1. The **Receiving Goods [FPARCVD]** form opens with the cursor in the key block. To initiate a new receiver document, type NEXT in the **Receiver Document Code** field and Next Block (Ctrl+Page Down).

Oracle Fusion Middleware Open > FPARCVD

File Edit Options Block Item Record Query Tools Help

Receiving Goods FPARCVD 8.6 (SBOX)

Receiver Document Code: NEXT

Receiving Header

Receiving Method:

Carrier:

Date Received: ☐ Text Exists

Received By:

Packing Slip

Packing Slip: ☐ Text Exists

Bill of Lading:

Purchase Order

Purchase Order: ☒ Receive Items ☐ Adjust Items

Buyer:

Vendor:

Enter a Receiver Document Code or use NEXT for automatic assignment.

Record: 1/1 | | | | <OSC>

2. A **Receiver Document Code** (Y+7digits) will be assigned. Make note of this code for your records.
3. The **Receiving Method** and **Carrier** are optional fields and do not need to be filled in.

Receiving Method List (FTVRCMT)

Find %

Code	Receiving Description	Eff Date	Activity Date
ADJU	Adjust	01-SEP-2000	18-AUG-2006
RECD	Needs received	01-SEP-2000	18-AUG-2006

Find OK Cancel

4. Tab to or click on the **Date Received** field.

Receiving Method field

Receiver Code assigned

Receiving Goods: FPARCVD 8.6 (SBOX)

Receiver Document Code: Y0021571

Receiving Header

Receiving Method:

Carrier:

Date Received: 13-JUN-2013 ☐ Text Exists

Received By: CLSMITH

5. The **Date Received** and the **Received By** fields are automatically filled in by the system. The **Received By** field is filled in with your **Banner User ID**.

System date; can be overridden

System fills in User ID

Oracle Fusion Middleware Forms Services: Open > FPARCVD

File Edit Options Block Item Record Query Tools Help

Receiving Header

Receiving Method:

Carrier:

Date Received: 13-JUN-2013 ☐ Text Exists

Received By: CLSMITH

Packing Slip

Packing Slip: ☐ Text Exists

Bill of Lading:

Purchase Order

Purchase Order: ☒ Receive Items ☐ Adjust Items

Buyer:

Vendor:

More...

Enter the Receiving Method Code; LIST is available.


Record: 1/1 | ... | List of Valu... | <OSC>

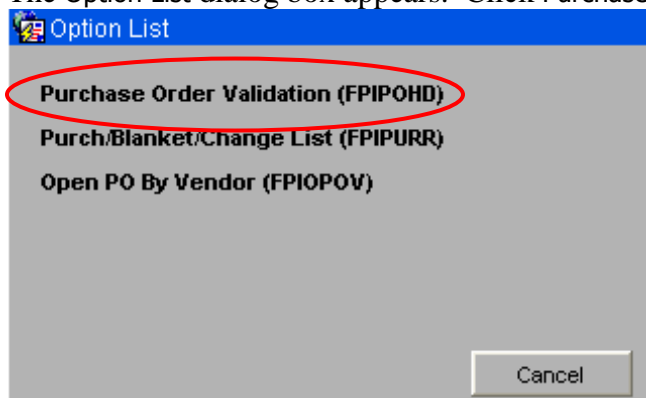
6. To add comments to this document regarding the goods received, go to the Options menu and left mouse click on View Receiving Text [FOATEXT] then follow steps 6a – 6d. **OTHERWISE, PROCEED TO STEP 7.**
 - a. The General Text Entry FOATEXT form opens. You can enter up to 50 characters of text per line. Arrow down (using your keyboard) as necessary to enter additional lines of text.
 - b. Save (F10) your changes when you have completed your text entry.
 - c. Exit (Ctrl+Q) to return to the Receiving Goods form.

Enter Receiving Comments in this area

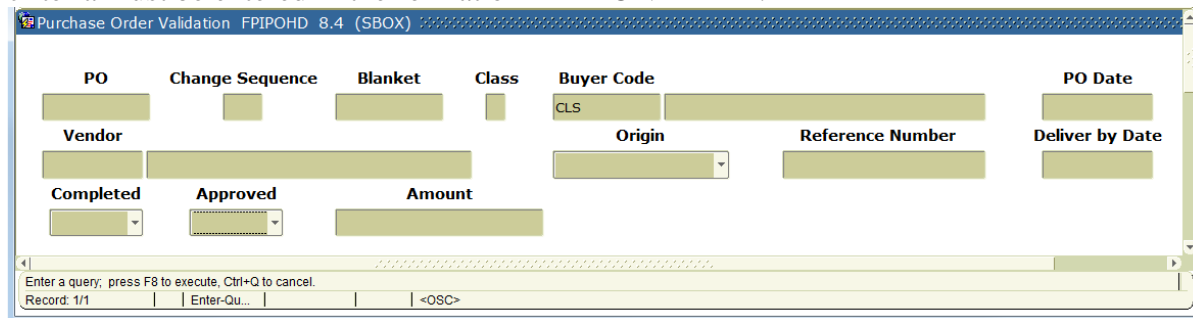
- d. The Text Exists checkbox is now checked on the form, indicating that there is receiving text for this document.

7. Click in the **Packing Slip** field and enter the **Packing Slip** number. The vendor normally supplies this number. If you don't have a packing slip number, you can also enter the associated purchase order or requisition number as a reference. Note: This is a **required** field and cannot be left empty.

8. **OPTIONAL:** Click in the **Bill of Lading** field and enter the bill of lading.
9. Click in the **Purchase Order** field and enter the purchase order number you want to receive (Format: P##### where # is a numeric digit 0-9) and **PROCEED TO STEP 10**. If you need to look up the purchase order number, click the **Search** icon () to the right of the **Purchase Order** field and follow steps 9a – 9h.
 - a. The Option List dialog box appears. Click Purchase Order Validation (FPIPOHD).



- b. The Purchase Order Validation FPIPOHD form opens in query mode.
- c. Enter your search criteria in any combination of the following fields: **PO** (purchase order number), **Change Sequence**, **Blanket**, **Class**, **Buyer Code**, **PO Date**, **Vendor**, **Origin**, **Reference Number**, **Deliver by Date**, **Completed**, **Approved**, and **Amount**. You can use % as a wildcard character in your search. Note: Searches are **case sensitive** and any date criteria must be entered in the format of DD-MON-YYYY.


 The image shows the "Purchase Order Validation FPIPOHD 8.4 (SBOX)" form. It contains several input fields for search criteria: PO, Change Sequence, Blanket, Class, Buyer Code (with a dropdown menu showing "CLS"), PO Date, Vendor, Origin (with a dropdown menu), Reference Number, Deliver by Date, Completed (with a dropdown menu), Approved (with a dropdown menu), and Amount. At the bottom, there is a status bar with the text "Enter a query; press F8 to execute, Ctrl+Q to cancel." and "Record: 1/1".

- d. Execute Query (or press **F8** on your keyboard) to perform the search.
- e. The Purchase Order Validation FPIPOHD form returns all matches. Scroll down as necessary to locate the PO you are looking for.
- f. If you need to search again, use Enter Query (press **F7** on your keyboard) and **RETURN TO STEP 9c**.

- g. Once you have located the PO number you are looking for, double click in the **PO** field to return the PO number to the Receiving Goods form.

Purchase Order Validation FPIPOHD 7.0 (TRAIN)

PO	Change Sequence	Blanket	Class	Buyer Name	PO Date	Deliver by Date
P0050371				Keith Hickman	03-MAR-2006	31-MAR-2006
Vendor G00025297 Young, Adrian M.						
Completed	Approved		Origin		Reference Number	
Y	Y		BANNER			
			Amount			
			40.00			

PO	Change Sequence	Blanket	Class	Buyer Name	PO Date	Deliver by Date
P0050372				Paula Wohnoutka	03-MAR-2006	03-MAR-2006
Vendor 383210796 Advanced Technologies Consultants						
Completed	Approved		Origin		Reference Number	
Y	Y		BANNER			
			Amount			
			525.00			

- h. The **Purchase Order** number is returned to the Receiving Goods form.
10. The radio icons for **Receive Items** and **Adjust Items** give you the opportunity to choose to process this document as a **receiver** or as an **adjustment**. An **adjustment** is a **negative receiver** that allows you to correct data entry errors that have previously been posted. Note: when entering an adjustment, you can enter negative quantities to reduce a previous quantity received.

Receiving Goods FPARCVD 8.6 (SBOX)

Receiver Document Code: Y0021571

Receiving Header

Receiving Method:
 Carrier:
 Date Received: 13-JUN-2013 ☒ Text Exists
 Received By: CLSMITH

Packing Slip

Packing Slip: 123456 ☐ Text Exists
 Bill of Lading:

Purchase Order

Purchase Order: P0020537
 Buyer: See PO in CougarMart
 Vendor: 100002069 Business Printing Inc

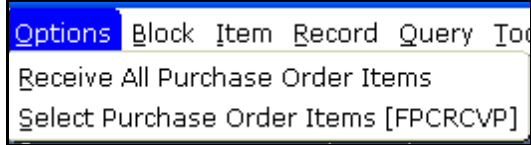
Choose to process document as a Receiver or as an Adjustment

☒ Receive Items ☐ Adjust Items

11. The **Buyer** and **Vendor** fields fill in automatically from the purchase order document entered.

12. If all items listed on the original purchase order were received, choose Recieve All Purchase Order Items from the Options menu and then Next Block (Ctrl+Page Down). All the required fields will be filled in automatically for you.

13. If you only received a **partial** shipment, choose Select Purchase Order Items [FPCRCVP] from the Options menu and follow steps 13a – 13m.



- The Receiving Goods PO Item Selection FPCRCVP form opens, displaying all the commodities for this purchase order.
- Next Block (Ctrl+Page Down) and then click the appropriate **Add Item** checkbox(es) to choose which items you want to receive and then Save (F10).

Click to select items to receive

The screenshot shows the 'Receiving Goods PO Item Selection FPCRCVP 8.5 (SBOX)' form. It includes fields for Purchase Order (P0020537), Receiver Document (Y0021571), Vendor (100002069 Business Printing Inc), Packing Slip (123456), and Blanket Order Number. A table lists items with columns for Item, Commodity, Text Exists, U/M, Quantity, and Quantity Accepted. Item 1 is '-Business Cards', Item 2 is '-Business Cards', and Item 3 is '-Business Cards'. To the right of the table is an 'Add Item' column with checkboxes. A yellow callout box points to the 'Add Item' column with the text 'Click to select items to receive'.

- Exit (Ctrl+Q) the Receiving Goods PO Item Selection form. You will get a Banner window asking "Do you want to save the changes you have made?". Left mouse on Yes.

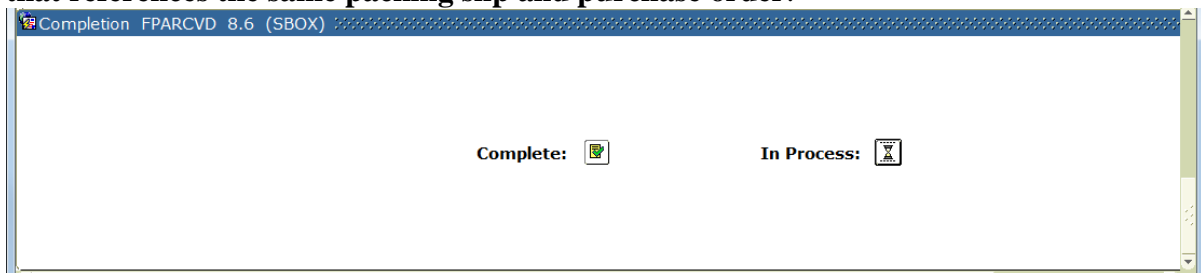
The screenshot shows the same 'Receiving Goods PO Item Selection FPCRCVP 8.5 (SBOX)' form as before, but with a 'Banner' dialog box open in the center. The dialog box has a yellow background and a blue title bar. It contains the text 'Do you want to save the changes you have made?' and three buttons: 'Yes', 'No', and 'Cancel'. The 'Yes' button is highlighted. The 'Add Item' column in the background table now has checkboxes for all three items, and the third item's checkbox is checked.

- d. You will get a Forms window stating FRM-40400: Transaction complete: 3 records applied and Saved. This message will also be displayed at the bottom right. Left mouse click on the OK button.

- e. Next Block (Ctrl+Page Down). The Commodity window appears. The commodity information will default from the purchase order.

- f. The **Description** field will display the overwritten commodity description (if it was entered).
- g. The **Final Received** checkbox allows you to indicate if this item on this receiving document is the last of that commodity item to be received. If you have received this entire commodity item, click to check this box.

- h. Click in the **Current Quantity Received** field and enter the quantity of goods received and accepted for each item being received.
 - i. If necessary, click in the **Current Quantity Rejected** field and fill in the quantity of items rejected and press the **TAB** key on your keyboard.
14. Review all the information on the receiver for accuracy.
15. Next Block (Ctrl+Page Down) or select Access Completion from the Options menu.
16. If you want to save the document for additional modifications at a later time, click the **In Process** icon in the Completion window at the bottom of the screen.
17. If you are finished with the document, click the **Complete** icon in the Completion window at the bottom of the screen. Once a receiver document is completed, you **cannot** make further changes to it. **If additional changes are required, you will need to enter another receiver that references the same packing slip and purchase order.**



18. If you clicked **Complete** icon, the **Auto Hint** (above the Status line at the bottom of the screen) will indicate that the Receiver Document has been completed.
- Receiver Document Y0000198 has been completed.
Record: 1/1
19. If necessary, note the **Receiver Document Code** (Format: Y##### where # is a numeric digit (0-9) on the appropriate paperwork.
20. To enter another receiver, **RETURN TO STEP 1**. If you are finished, Exit (Ctrl+Q) the Receiving Goods FPARCVD form.

Requisitioning of Fixed Assets

Fixed assets are defined as being used in operations and having an initial useful life extending beyond a single reporting period. A **controlled** asset ranges in cost from \$500 - \$4,999 and includes equipment/furniture (account 787410) and computer/media equipment (account 787430). A **capital** asset is any type of equipment or furniture costing \$5,000 or greater (account 7774XX).

When creating a requisition, all pieces and parts that make up a taggable asset should be put together as ONE line item. Costs incurred in order to put the fixed asset in place or operation should be included in the cost of the asset/asset account. Ancillary items necessary to place the asset in its intended location and condition for use should be coded to the asset; i.e., freight, installation, labor.

NOTE: For consistency, when assets (777xxx and 787xxx) are on a requisition with supply/expense items, and freight is involved, split the freight in half and allocate the freight to both the asset account and supply account. When the CougarMart PO processes through Banner, asset and non-asset accounts within a single line item (such as splitting a shipping or service charge in the same line) will cause a processing error. Enter the shipping/service charges as separate line items if the shipping/service cost is split between fixed and non-fixed assets.

Service charge split between fixed and non-fixed asset line items.

The screenshot shows the Banner Accounting Codes window for requisition PO P0014310. It displays two line items, 6 and 7, both marked as 'Service Charge'. Red arrows originate from a central point above the text 'Service charge split between fixed and non-fixed asset line items' and point to the 'Account' field of each line item. Line 6 is assigned account 787410 (Equipment/Furniture Non-Depreciable), and line 7 is assigned account 733120 (Office Supplies). Both items have a quantity of 1 EA and a unit price of 45.00 USD. The subtotal for the requisition is 2,310.69, with shipping and handling at 0.00 each, resulting in a total of 2,310.69 USD.

Index	Location	Account
964014 PRC - Parking Lot F and Building	no value	733120 Office Supplies
6 ✓ Service Charge	Z-SERVICE	EA 45.00 1 EA 45.00 USD
964014 PRC - Parking Lot F and Building	no value	787410 Equipment/Furniture Non-Depreciable
7 ✓ Service Charge	Z-SERVICE	EA 45.00 1 EA 45.00 USD
964014 PRC - Parking Lot F and Building	no value	733120 Office Supplies

Subtotal	2,310.69
Shipping	0.00
Handling	0.00
Total	2,310.69 USD

Ensure a location code is entered on the accounting code line for fixed assets

Accounting Codes - PO P0014310 - Mozilla Firefox

File Edit View History Bookmarks Tools Help

scquest.com https://solutions.scquest.com/apps/Router/PODynamicSection?poId=16839706&NavLevel1=Nav_1 ☆ Ask.com

Most Visited Getting Started Latest Headlines Customize Links Free Hotmail Windows Marketplace Windows Media Windows

Restore Session Accounting Codes - PO P0014310

	Index	Location	Account	edit
1	964014 PRC - Parking Lot F and Building	no value	733120 Office Supplies	edit
2	964014 PRC - Parking Lot F and Building	no value	733120 Office Supplies	edit
3	964014 PRC - Parking Lot F and Building	6F102 no value	787410 Equipment/Furniture Non-Depreciable	edit

Accounting Codes

Index: 964014 (Select from all values...)

Location: 6F102 (Select from all values...)

Account: 787410 (Select from all values...)

add split

Save Cancel

Furniture Quotes & Requisitions

- When obtaining quotes for furniture items, ask the supplier to indicate the items used to make a single unit, such as a desk, that will have a value of \$500 or more.
- Enter the end item (such as the specific type of desk with any additional parts, ie., pedestal with drawers, hutch, etc.) in the product description and reference the **attached** quote for specific details if there is insufficient room in the product description box.



All items on page 1 of the quote make up a HON U-shaped faculty desk.

PRC DANCE STUDIO-F102-2.pdf - Adobe Acrobat Professional

File Edit View Document Comments Forms Tools Advanced Window Help

CCCC-PRC DANCE STUDIO
ROOM# F102
COLLIN COUNTY HON EPA GFF CONTRACT & COLLIN
COUNTY CONTRACT # 3059
ALL PRICES INCLUDE DELIVERY AND INSTALLATION
APPROXIMATE DELIVERY IS 5 WEEKS

PLANO
office supply

105 AVENUE K
PLANO, TEXAS 75074
Phone 972-424-8561 Fax 972-422-9936
www.planoofficesupply.com

Qty	Product	Description	List/Sel	Ext. List/Sel
1	832436M	Primary 240x36W Flat Ed. Lam w/Grommet (\$0.1WDG) L1 Woodgrain Lam Opts J.N Lam: Dark Red E.ON Edg: Dark Red P Plastic: Grommet	\$266.00 \$109.06	\$266.00 \$109.06
1	83222ELM	Corner Cove 72x36-24L/24R Extd LH Flat w/Grom (\$0.1PSOWD) L1 FSC Woodgrain Lam Opts F.ON CLR: Dark Red E.ON Edg: Dark Red P Plastic: Grommet	\$568.00 \$232.88	\$568.00 \$232.88
1	CEP2429F	Freestanding 240x29- 1/2H End Panel Support -- Skipped Option	\$148.00 \$60.68	\$148.00 \$60.68
1	CDL29	Corner Desk Leg 29-1/2H -- Skipped Option	\$116.00 \$47.56	\$116.00 \$47.56
1	CSL2429F	Freestanding 240x29-1/2H Support Leg -- Skipped Option	\$127.00 \$52.07	\$127.00 \$52.07
1	CSCMP7229	Stand-Alone Corner 29-1/2Hx72W Modesty Panel -- Skipped Option	\$154.00 \$63.14	\$154.00 \$63.14
2	CS364	Half Height 14Hx36W Modesty Panel -- Skipped Option	\$127.00 \$52.07	\$254.00 \$104.14
1	PM187-203B	Bus Mobile Pad 88F 28H 19-7/8D Bev Pull -- Skipped Option STD Standard Random key	\$512.00 \$209.92	\$512.00 \$209.92
1	PM188-203B	Bus Mobile Pad 28H 19-7/8D Bev Pull -- Skipped Option	\$512.00 \$209.92	\$512.00 \$209.92

TL4GRC04WCB08091.L1.vsal.sp4 8/9/2011 Page 1 of 3

STD Standard Random key

\$789.00 \$369.00

The Non-Catalog form Product Description and Notes fields should include as much descriptive information regarding the desk as possible. Attach your quote to the **External Notes and Attachments**.

The screenshot shows a web browser window titled "Non-Catalog Form - Mozilla Firefox". The address bar shows the URL: <https://solutions.sciquest.com/apps/Router/POEditForm?docId=16839706&docLineId=58322315&tmstamp=131350305473180>. The page has a header with "Non-Catalog Form" and "Available Actions (Click here for details):" with a dropdown menu set to "Save" and buttons for "Go" and "Close". Below the header are tabs for "Form" and "History". The main content area is divided into sections: "Supplier Info" with fields for Supplier (Plano Office Supply), Fulfillment Address (Business 1: (preferred), Attn Tom Lowe, 705 Avenue K, Plano, TX 75074 US), and Supplier Phone (+1 (972) 424-8561). Below this is "General Info" with a "Catalog No." field containing "N/A". A note states: "The first line of the Product Description should be concise to assist Inventory Control. A maximum of 50 characters is fed into Banner. Please follow the first line with a full description for viewing in CougarMart. Quotes can be attached as either an Internal or External Notes and Attachment." The "Product Description" field contains the text: "HON Faculty Desk, U-Shaped, Mahogany Includes 2 Pedestals w/Drawers, End Panel Support, Corner Cove and Desk Leg, Support Leg, and 3 Modesty Panels". Below this field is a character count "107 characters remaining" and links for "expand" and "clear". Other fields include "Quantity" (1), "Packaging (UOM)" (EA - Each), "Unit Cost" (1,089.37), "Product Size" (a dropdown menu), and "Manufacturer Name" (a text field). The bottom of the page has a "Done" button.

A receiver will not be done in Banner until all the parts and pieces making up the single line item are received.

Every Plano Office Supply purchase order for HON furniture products (chairs and storage cabinets) **requires** a Z-Service Charge of \$90. This is the first item in those categories. If you are ordering supply account items with a value of less than \$500 in combination with capital/controlled items with a value of greater than \$500, you will add the second Z-service charge item of \$45 to your cart twice. When these two items are returned to your CougarMart cart you will enter the appropriate accounting on each line item. Banner does not accept splitting the accounting between supply and capital/controlled accounts within the same line item.

This information is also available on page 2 of the Plano Office Supply User guide which can be accessed thru the punch-out.

Supplemental Request Number

The supplemental request number assigned upon approval should be entered in your CougarMart Requisition on the Summary tab in the General area. See below for instructions.

1. Left mouse click on the General hyperlink or the **Summary** tab to enter additional information about your request.

CougarMart eProcurement | 2012-08-22 PUR_TEMP1 01 | 1 item(s), 225.39 USD

Search for PO No. [] Go

home/shop | favorites | forms | carts | document search | profile | user management | more >>

active cart | draft carts | favorites | my requisitions

General Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments Purchasing Use Only Terms and Conditions Final Review

Place Order or Assign Cart

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Account
- Required field: Index

Requisition | PR Approvals | PO Preview | Comments | Attachments | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info | Taxes/S&H

Hide header

General		Shipping		Billing	
Cart Name	2012-08-22 PUR_TEMP1 01	Ship To	Attn: Cyndy Smith Room: 360 Central Receiving 3452 Spur 399 McKinney, TX 75069 United States	Bill To	Accounts Payable PO Box 8021 McKinney, TX 75070 United States
Accounting Date	no value				
Description	no value				
Priority	Normal				
Prepared by	PUR_TEMP1				
Prepared for	PUR_TEMP1				
Department	Purchasing (Purchasing)				
		Delivery Options	Req Delivery		
		9/5/2012 Requested Delivery Date for the following Suppliers is unsupported will not be sent: Dell Marketing LP			

View/edit by line item...

Accounting Codes		
Index	Account	Location
no value Required field	no value Required field	no value

View/edit by line item...

Internal Notes and Attachments		External Notes and Attachments		Purchasing Use Only	
Internal Note	no note	Note to all Suppliers	no note		
Internal Attachments			Notes for the following Suppliers are unsupported		

2. To make changes in the **General** section, choose the **edit** button.

3. In the Description field of the General area enter information, such as fall 20YY Classroom Supplies, or Open Purchase Order, or the Supplemental Number #13-## (where 13 equals the fiscal year and 1-91 is the request number, example 13-91). There is a 100 character limit.

CougarMart eProcurement Cyndy Smith profile | logout | Select Draft Cart or Add Item to Cart

Summary - Requisition 833672 Search for Supplier Profile [Go]

home/shop | carts | **approvals** | forms | contracts | document search | reports | more >> | AAA

requisition | purchase order | requisition outbox | purchase order outbox | ?

Return to Approvals | 1 of 2 results | Requisition Number(s) 833672 | Folder: My PR Approvals

Available Actions: Approve/Complete & Show Next | Go

Requisition | PR Approvals | PO Preview | Comments (1) | Attachments | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info | Taxes/S&H

Hide header | Hide value descriptions

General	Shipping	Billing
General ? X Status: Pending Organization Manager Approval (Cyndy Smith) Submitted: 8/22/2012 10:11 AM Cart Name: 2012-08-22 PUR_TEMP1 01 Accounting Date: mm/dd/yyyy Description: Supplemental Number #13- Priority: Normal Prepared by: Test Requisitioner Save Cancel	Ship To edit Attn: Cyndy Smith Room: 360 Central Receiving 3452 Spur 399 McKinney, TX 75069 United States Delivery Options edit Req Delivery 9/5/2012 View/edit by line item...	Bill To edit Accounts Payable PO Box 8021 McKinney, TX 75070 United States View/edit by line item...

Appendix 1 Entering a Requisition for a Printing Job

From: Keli Fink
To: Alicia Huppe; Cyndy Smith; Doug Willis; Michelle Millen
CC: Joy LaFon
Date: 6/9/2011 1:30 PM
Subject: Requisition Information for Job# 11PB-256 HSES Brag Booklet

Below is the information to enter a requisition in CougarMart for your print job. Please enter the items exactly as indicated. Follow CougarMart instructions for items not mentioned. Your approval to print and a purchase order are required before we can send your print job to the vendor. To ensure your collateral is delivered on time we ask that you enter a requisition in CougarMart now. **Please email the PO to Keli Fink at kfink@collin.edu as soon as you receive it from Purchasing.**

- Select "non-catalog form" (ARE PRINTING CONTRACT ITEMS LOADED IN COUGARMART? THIS WILL CHANGE THE PROCEDURES.)

Supplier Info: AC Printing
Catalog No: NA
Product Description: Item #139 8" x 8" Booklet & Job# 11PB-265 HSES Brag Book
Ink: 4/4, 4-Color Process, Paper: #3, 92% Bright White 100 Cover, Dull
Quantity: 1
Packaging (UOM): TH - Thousand
Estimated Price: \$1,835

- Select "Add and go to Cart"
- Select "Proceed to Checkout"

Shipping Address: CHEC
Address Details:
Attention Keli Fink
Room: 416
Central Receiving
3452 Spur 399
McKinney, TX 75069

Req Delivery: 7/22/11

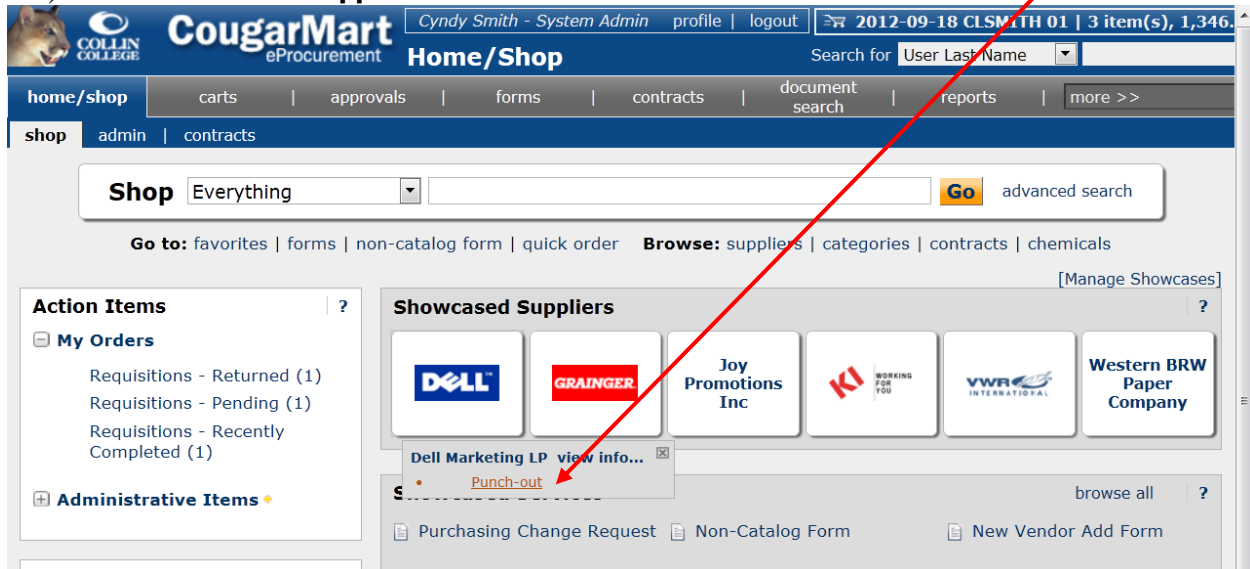
If you have any questions regarding your requisition before you place the order, please select "Assign Cart" and send the requisition to me and I can review it before you send it along the approval path.

Thank you
Keli

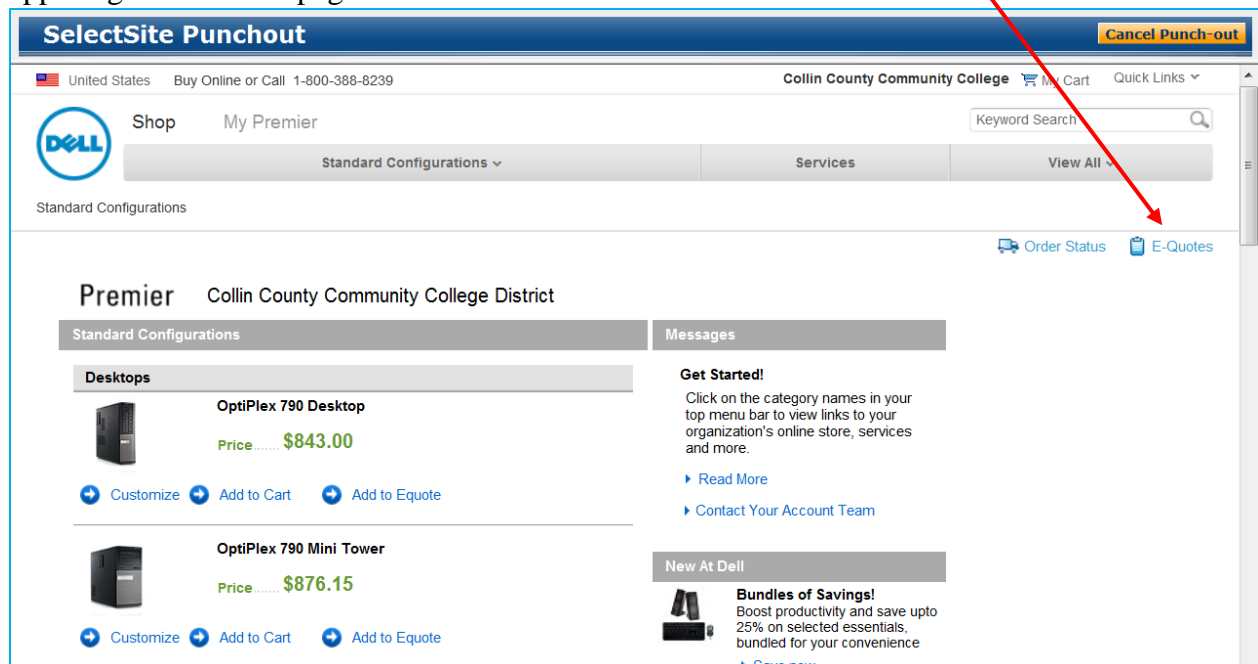
Keli Fink
Production Coordinator
College & Public Relations
Collin College
Collin Higher Education Center
P|972.758.3838
F|972.985.3729
kfink@collin.edu
www.collin.edu (<http://www.collin.edu/>)

Requisitioning Using Dell E-Quotes

When processing a requisition to Dell using an e-quote, left mouse click on the Dell logo (punch-out) in the **Showcased Suppliers** area.



When the Dell punch-out appears on the screen, left mouse click on the **E-Quotes** link on the upper right side of the page.



To retrieve an E-quote, enter the E-mail address of the person who requested the quote and click on the [Retrieve E-Quote](#) link.

SelectSite Punchout Cancel Punch-out

United States Buy Online or Call 1-800-388-8239 **Collin County Community College** My Cart Quick Links

DELL Shop My Premier Keyword Search

Standard Configurations Services View All

Dell recommends Windows® 7.

E-Quotes

Retrieve an E-quote
To retrieve your E-quote fill out the form and press "Retrieve E-Quote" button. If your E-quote has expired it is no longer available and you will be returned to this page. E-quotes are available for 60 days from the date of creation.

Find E-Quotes

★ Indicates Required Fields

★ E-mail address

[Retrieve E-Quote](#)

Help

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Site Terms | Terms of Sale | Privacy | Feedback

A complete list of all valid e-quotes from that E-mail address will be displayed. Left mouse click on the arrow beside the appropriate quote in the **Create Order Requisition** column.

SelectSite Punchout Cancel Punch-out

United States Buy Online or Call 1-800-388-8239 **Collin County Community College** My Cart Quick Links

DELL Shop My Premier Keyword Search

Standard Configurations Services View All

Dell recommends Windows® 7.

E-quotes

[E-quote Help](#) [Enter a Different Email Address](#)

Display

Select your viewable column headers. Your table will be modified based upon your selection.

E-quote Name Authorized Buyer Created By Created Date Sub Total

Filter by Authorized Buyer All Filter by Order Submitted All [Apply](#)

E-quote Number	E-quote Name	Authorized Buyer	Created By	Created Date	Sub Total	Total	Create Order Requisition	Delete
1007080021698	Video Card		Carl Dempsey	9/12/2012	\$128.51	Not Calculated	+	Delete
1008378084950	Memory Upgrade		Carl Dempsey	9/25/2012	\$37.38	Not Calculated	+	Delete
1011001560198	Battery		Carl Dempsey	9/5/2012	\$97.92	Not Calculated	+	Delete
1012361159258	Monitors		Carl Dempsey	9/5/2012	\$299.52	Not Calculated	+	Delete
1013601845599	Rack_KVM_KMM		Carl Dempsey	9/26/2012	\$2,384.90	Not Calculated	+	Delete
1013715398873	KMM		Carl Dempsey	9/25/2012	\$820.79	Not Calculated	+	Delete
1014852303775	Printer		Carl Dempsey	9/26/2012	\$632.39	Not Calculated	+	Delete
1014910323153	Printer		Carl Dempsey	9/5/2012	\$619.37	Not Calculated	+	Delete
1014913128377	Memory Upgrade		Carl Dempsey	9/21/2012	\$67.98	Not Calculated	+	Delete

When the E-quote appears on the screen, review for accuracy and click on the Create Order Requisition button at the bottom of the window.

SelectSite Punchout Cancel Punch-out

Your Current E-quote Number
1014913128377
[E-quote Help](#)

Cart **E-Quotes**

Summary View | [Detail View](#) [Print](#) [Email](#) [Add Item](#)

E-quote Name	Memory Upgrade	E-Quote Description	Memory Upgrade
Saved By:	Carl Dempsey cdempsey@collin.edu	Phone Number:	(972) 881-5767
Saved On:	Friday, September 21, 2012	Purchasing Agent:	
Expires On:	Tuesday, November 20, 2012	Notes/Comments:	
Premier Page Name	Collin County Community College	Additional Comments:	

	Qty	Unit Price
2 GB Dell Certified Replacement Memory Module for Select Dell Systems Remove Item		
2 GB Dell Certified Replacement Memory Module for Select Dell Systems Product Details	2	\$33.99
	Update Total	
Sub-total		\$67.98

Coupon Entry
Enter coupon number
[Apply Coupon](#)
Note: Coupon savings are only applied to items you have added to your cart.

Sub-total **\$67.98**
Tax --
[Create Order Requisition](#)

The Shipping window opens. In the **Trade Compliance** section, left mouse click on the radio button in front of I WILL NOT export this order outside the United States and click on the Continue button.

SelectSite Punchout Cancel Punch-out

United States Buy Online or Call 1-800-388-8239 Collin County Community College [My Cart](#) [Quick Links](#)

Shop **My Premier**

[Standard Configurations](#) [Services](#) [View All](#)

Dell recommends Windows® 7.

Shipping [Secure Shopping Guarantee](#) [Norton Secured](#)

SHIPPING **PAYMENT** **VERIFY & SUBMIT ORDER REQUISITION**

* Indicates Required Fields

[Continue](#)

Trade Compliance

☒ I WILL NOT export this order outside the United States.
☐ I WILL export this order outside the United States.

The export of any product and software purchased from Dell must be made in accordance with all relevant laws of the United States, including and without limitation, the U.S. Export Administration Regulations. This may require that you obtain a formal export license or make certain declarations to the United States Government regarding product(s) to be exported, their destination or their end-use.

[Continue](#)

The Verify & Submit Order Requisition page is displayed. Click on Submit Order Requisition button and the requisition will be returned to CougarMart for final checkout.

SelectSite Punchout Cancel Punch-out

United States Buy Online or Call 1-800-388-8239 Collin County Community College My Cart Quick Links

Shop My Premier Keyword Search

Standard Configurations Services View All

Dell recommends Windows® 7.

VERIFY & SUBMIT ORDER REQUISITION

Secure Shopping Guarantee Norton Secured powered by VeriSign

SHIPPING PAYMENT **VERIFY & SUBMIT ORDER REQUISITION**

Your Order Requisition is nearly complete. Please review the following details and edit if necessary. Select "Submit Order Requisition" (bottom right) to submit.

Unless you have a separately signed agreement between you and Dell that specifically applies to this order, by clicking on the "Submit Your Order" button, you agree to Dell's [COMMERCIAL TERMS OF SALE](#) (for purchases meant for internal use), or the [RESELLER TERMS OF SALE](#) (for purchases meant for resale), as well as Dell's [WARRANTY](#) and applicable [SERVICE DESCRIPTION\(S\)](#). THESE TERMS CONTAIN IMPORTANT INFORMATION ABOUT YOUR RIGHTS AND OBLIGATIONS, INCLUDING LIMITATIONS OF LIABILITY. These terms are hereby fully incorporated into the transaction and are available in hardcopy from Dell upon request.

Submit Order Requisition

View/Print Cart

- Print Order Summary
- Print Order Details

Order Requisition Date and Time:
September 27, 2012 1:09 PM CST

Contact Information **Billing Information** **Payment Method**

Once returned to CougarMart, click on the **Proceed to Checkout** button. Follow Requisitioner's Guide instructions beginning on page 10, step 14 to complete the requisition.

CougarMart eProcurement Cyndy Smith - System Admin profile | logout 2012-09-18 CLSMITH 01 | 5 item(s), 1,414.54

Cart - 33202467 - Draft Requisition

Search for User Last Name

home/shop **carts** approvals forms contracts document search reports more >>

active cart draft carts other draft carts assigned carts favorites my requisitions reminder settings

Shopping Cart for Cyndy Smith - System Admin **Continue Shopping**

Name this cart: 2012-09-18 CLSMITH 01

5 Item(s) for a total of **1,414.54** USD
subtotal: 1,414.54 USD
estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

Have you made changes? **Update** **Help** **Empty Cart** Perform an action on (0 items selected)... **Select All**

Dell Marketing LP more info...
Business 1 **Edit**
Attn Jae Shin 5139209, One Dell Way, RR8, Round Rock, TX 78682 US

The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)

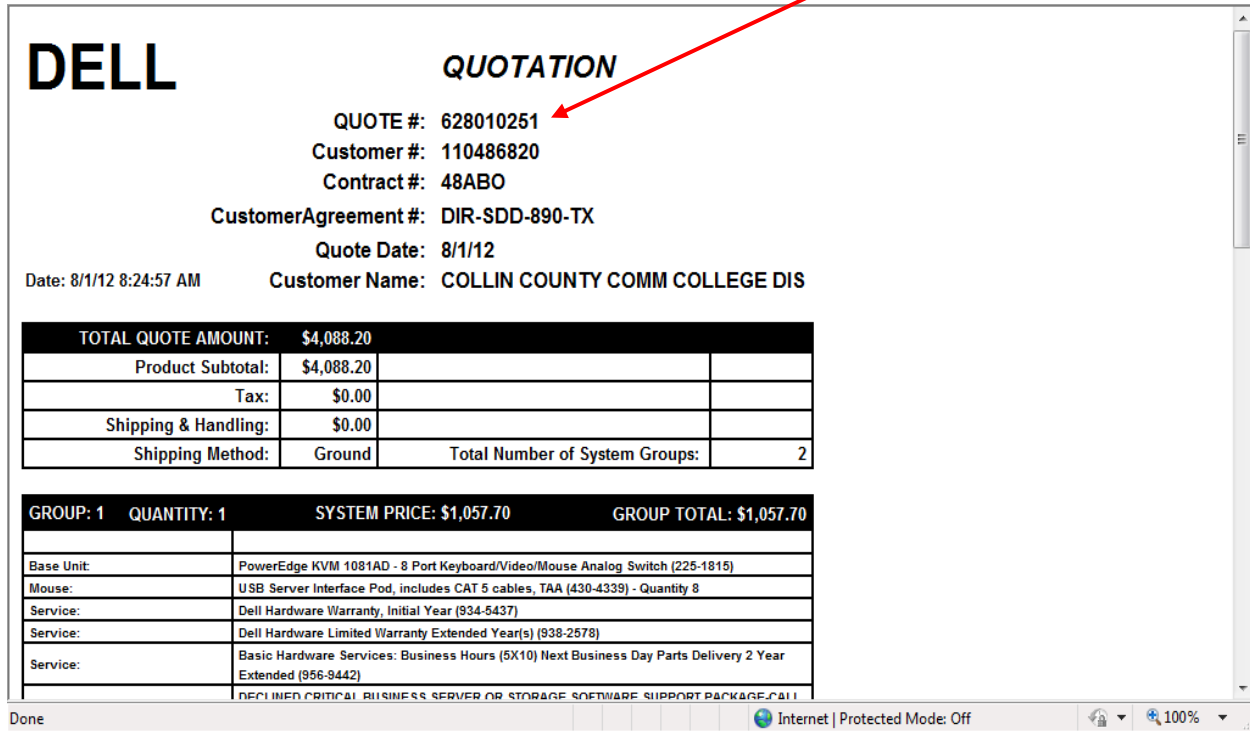
Need to make changes? **MODIFY ITEMS** | **VIEW ITEMS** Item(s) was retrieved on: 9/27/2012 1:12:33 PM

Line(s): 1

Product Description	Unit Price	Quantity	Total
Item added on Sep 27, 2012 2 GB Dell Certified Replacement Memory Module for Select Dell Systems	33.99 USD EA	2	67.98 USD
Part Number: A2149880			
Manufacturer Info: SNPYG410C/2G - (Dell)			
Contract: None selected choose contract...			

Requisitioning Using Dell Sales-Created Quotes

In addition to punch-out items and E-quotes, Dell also provides sales-created quotes as shown below.



DELL **QUOTATION**

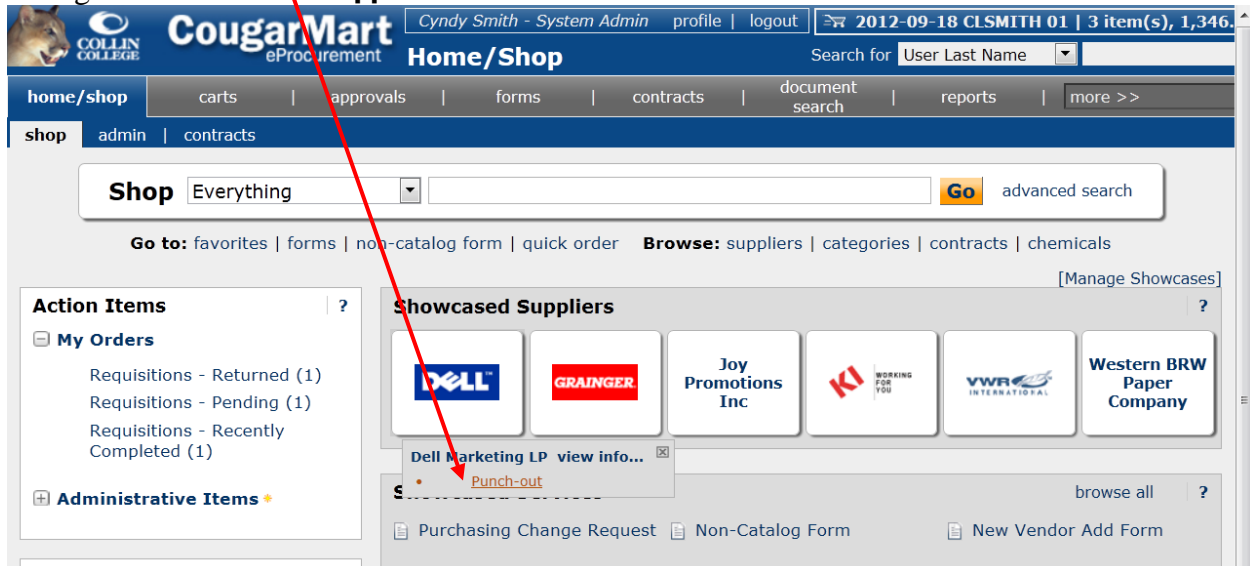
QUOTE #: 628010251
Customer #: 110486820
Contract #: 48ABO
Customer Agreement #: DIR-SDD-890-TX
Quote Date: 8/1/12
Date: 8/1/12 8:24:57 AM Customer Name: COLLIN COUNTY COMM COLLEGE DIS

TOTAL QUOTE AMOUNT: \$4,088.20	
Product Subtotal:	\$4,088.20
Tax:	\$0.00
Shipping & Handling:	\$0.00
Shipping Method:	Ground
Total Number of System Groups:	2

GROUP: 1	QUANTITY: 1	SYSTEM PRICE: \$1,057.70	GROUP TOTAL: \$1,057.70
Base Unit:	PowerEdge KVM 1081AD - 8 Port Keyboard/Video/Mouse Analog Switch (225-1815)		
Mouse:	USB Server Interface Pod, includes CAT 5 cables, TAA (430-4339) - Quantity 8		
Service:	Dell Hardware Warranty, Initial Year (934-5437)		
Service:	Dell Hardware Limited Warranty Extended Year(s) (938-2578)		
Service:	Basic Hardware Services: Business Hours (5X10) Next Business Day Parts Delivery 2 Year Extended (956-9442)		
DEFINED CRITICAL BUSINESS SERVER OR STORAGE SOFTWARE SUPPORT PACKAGE CALL			

Done Internet | Protected Mode: Off 100%

When processing a requisition to Dell using a sales-created quote, access the Dell punch-out through the **Showcased Suppliers**.



CougarMart eProcurement Cyndy Smith - System Admin profile | logout 2012-09-18 CLSMITH 01 | 3 item(s), 1,346.
Home/Shop Search for User Last Name
home/shop carts approvals forms contracts document search reports more >>
shop admin contracts

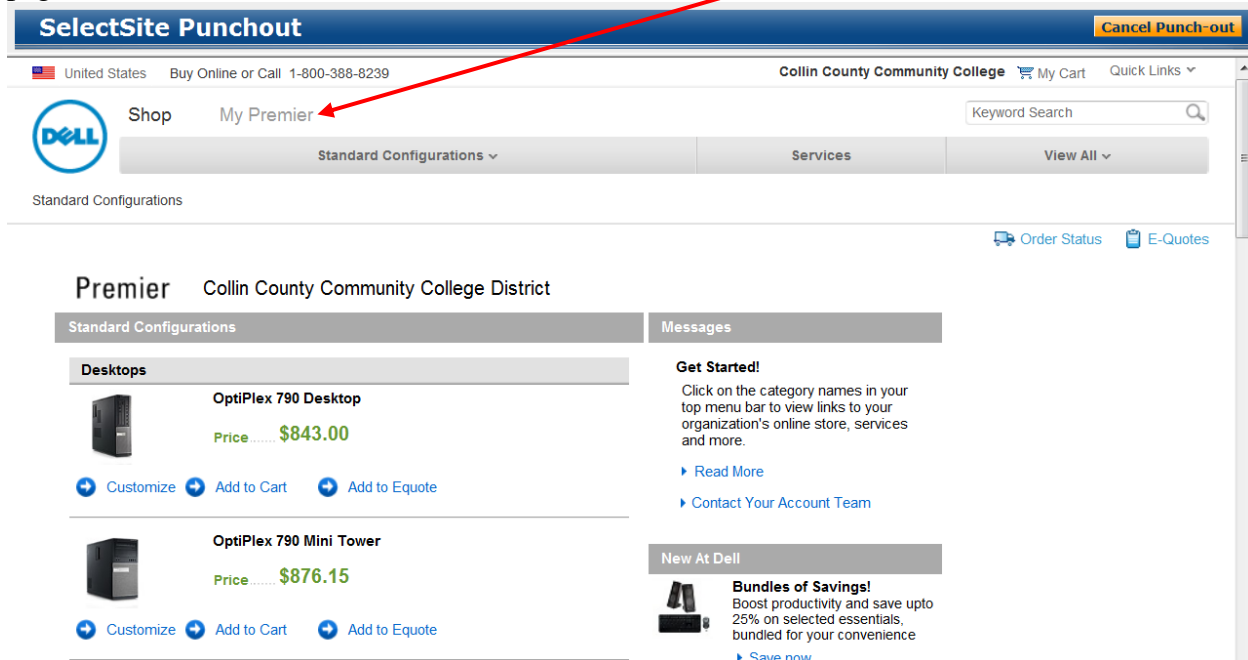
Shop Everything Go advanced search

Go to: favorites | forms | non-catalog form | quick order Browse: suppliers | categories | contracts | chemicals [Manage Showcases]

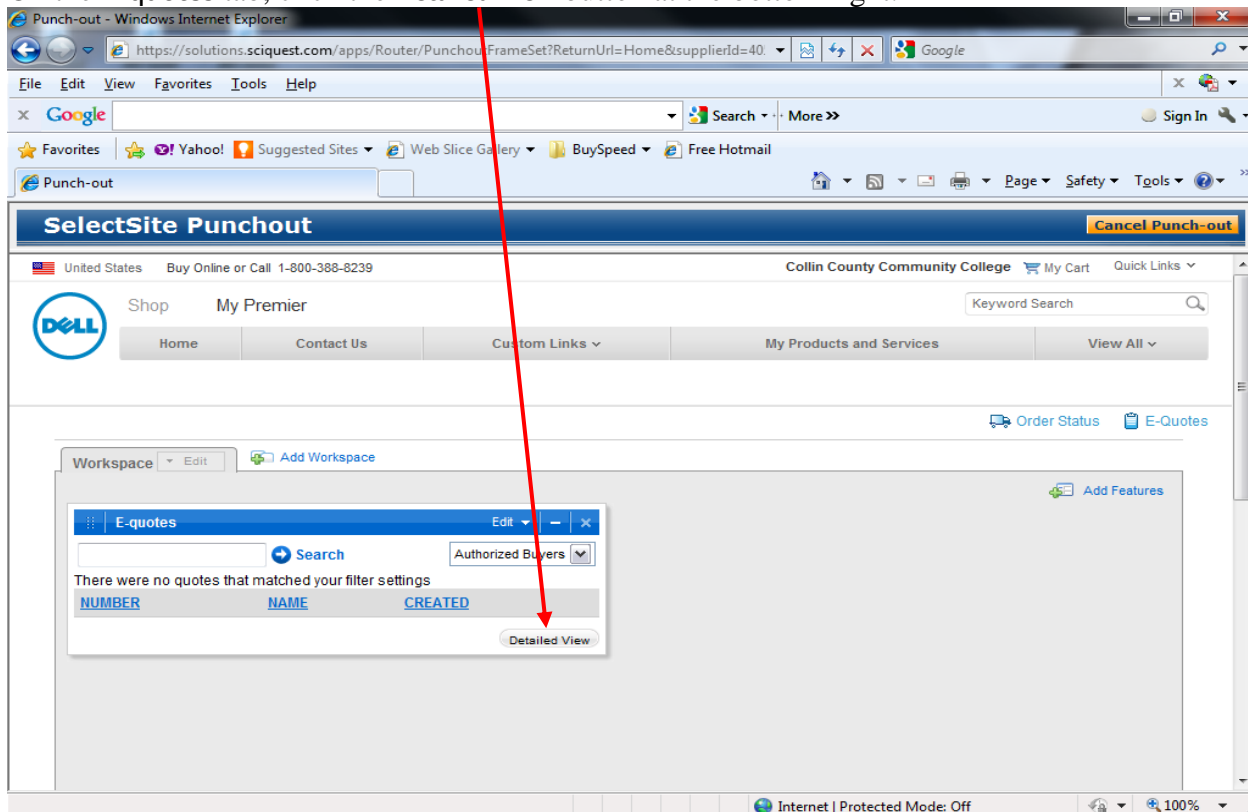
Action Items ?
My Orders
Requisitions - Returned (1)
Requisitions - Pending (1)
Requisitions - Recently Completed (1)
Administrative Items +

Showcased Suppliers ?
Dell Marketing LP view info...
Punch-out
browse all ?
Purchasing Change Request Non-Catalog Form New Vendor Add Form

When the Dell punch-out appears on the screen, access the My Premier link at the top left of the page.



On the E-quotes tab, click the Detailed View button at the bottom right.



Select the **Sales-created Quote** radio button and enter the Sales-created Quote (number) and the Customer number (from the sales-created quote) and click [Search](#).

The screenshot shows the 'SelectSite Punchout' interface. At the top, there's a header with 'United States', 'Buy Online or Call 1-800-388-8239', and 'Collin County Community College'. Below this is a navigation bar with 'Shop', 'My Premier', and a 'Keyword Search' field. The main content area is titled 'E-quotes Detail View' and includes a 'Workspace' section with 'Add Workspace' and 'Back to Workspace' links. On the left, under 'Display Options', there are two radio buttons: 'E-Quote Search (name, number, authorized buyer)' and 'Sales-created Quote'. The 'Sales-created Quote' option is selected. Below it are input fields for 'Sales-created Quote' (containing '628010251') and 'Customer number' (containing '110486820'). There are 'Search' and 'Clear' buttons. A red arrow points from the instruction text to the 'Sales-created Quote' radio button, and another red arrow points to the 'Search' button.



Select the quote by checking the box to the left of the [Quote #](#) and then click [Purchase](#).

The screenshot shows the 'SelectSite Punchout' interface. The 'E-quotes Detail View' section now displays a table of quotes. The table has columns: 'Quote #', 'Name', 'Saved On', 'Expires On', 'Buyer', 'Saved By', 'Order Submitted', and 'Price'. The first row shows a quote with 'Quote #' 628010251, 'Saved On' 8/1/2012, 'Expires On' 1/28/2013, and 'Price' \$4,088.20. A checkbox is checked next to the 'Quote #' column header. A red arrow points from the instruction text to this checkbox. Another red arrow points to the 'Purchase' button, which is located below the table. The 'Search' and 'Clear' buttons are still visible on the left.

A copy of the sales-created quote will appear on the screen. Click the Create Order Requisition button.

Dell recommends Windows.

QUOTE-TO-ORDER REQUISITION



★ Indicates Required Fields

Quote Summary

Please review the accuracy of this information before proceeding to checkout.

Quote Details

Dell quote number:	1016268784399
Dell customer number:	110486820
Dell sales representative:	JAE Y SHIN
Dell sales representative phone:	(800) 456-3355 - 80000
Date of quote:	April 25, 2013 5:32 AM CST

Billing Address	Shipping Address
COLLIN CO ACCTS PAYABLE COLLIN COUNTY COMM COLLEGE DIS Dell Customer # 110486820 PO BOX 8021 3452 SPUR 399 MCKINNEY, TX 75069 8742 (972) 758-3879	ACCOUNTS PAYABLE COLLIN COUNTY COMM COLLEGE DIS Dell Customer # 110486820 PO BOX 8021 3452 SPUR 399 MCKINNEY, TX 75069 8742 (972) 758-3879

[Create Order Requisition](#)

Description


Dell Mobile Precision M6600
Date & Time: May 17, 2013 3:02 PM CST

SYSTEM COMPONENTS	
Dell Mobile Precision M6600	Qty 20
Dell Mobile Precision M6600	Unit Price \$2,555.28

The Shipping window opens. In the **Trade Compliance** section, left mouse click on the radio button in front of I WILL NOT export this order outside the United States and click on the Continue button.

[Cancel Punch-out](#)


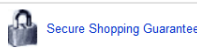
United States Buy Online or Call 1-800-388-8239 Collin County Community College My Cart Quick Links

 Shop My Premier Keyword Search

Standard Configurations Services View All

Dell recommends Windows® 7.

Shipping



[SHIPPING](#) PAYMENT VERIFY & SUBMIT ORDER REQUISITION

★ Indicates Required Fields

[Continue](#)

Trade Compliance

☒ I WILL NOT export this order outside the United States.
☐ I WILL export this order outside the United States.

The export of any product and software purchased from Dell must be made in accordance with all relevant laws of the United States, including and without limitation, the U.S. Export Administration Regulations. This may require that you obtain a formal export license or make certain declarations to the United States Government regarding product(s) to be exported, their destination or their end-use.

[Continue](#)

The Verify & Submit Order Requisition page is displayed. Click on Submit Order Requisition button and the requisition will be returned to CougarMart for final checkout.

SelectSite Punchout Cancel Punch-out

United States Buy Online or Call 1-800-388-8239 Collin County Community College My Cart Quick Links

Shop My Premier Keyword Search

Standard Configurations Services View All

Dell recommends Windows® 7.

VERIFY & SUBMIT ORDER REQUISITION

Secure Shopping Guarantee Norton SECURED powered by VeriSign

SHIPPING PAYMENT **VERIFY & SUBMIT ORDER REQUISITION**

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Submit Order Requisition

View/Print Cart

- Print Order Summary
- Print Order Details

Order Requisition Date and Time:
September 27, 2012 1:09 PM CST

Contact Information **Billing Information** **Payment Method**

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CougarMart eProcurement Cyndy Smith - System Admin profile | logout 2012-09-27 CLSMITH 01 | 7 item(s), 4,088.20

Cart - 33498980 - Draft Requisition

Search for User Last Name

home/shop **carts** approvals forms contracts document search reports more >>

active cart draft carts other draft carts assigned carts favorites my requisitions reminder settings

Shopping Cart for Cyndy Smith - System Admin **Continue Shopping**

Name this cart: 2012-09-27 CLSMITH 01

7 Item(s) for a total of **4,088.20** USD
subtotal: 4,088.20 USD
estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

Have you made changes? **Update** **Help** **Empty Cart** Perform an action on (0 items selected)... Select All

Dell Marketing LP more info...
Business 1 **Edit**
Attn Jae Shin 5139209, One Dell Way, RR8, Round Rock, TX 78682 US

The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 9/27/2012 2:05:21 PM
Line(s): 1, 2, 3, 4, 5

	Product Description	Unit Price	Quantity	Total
Item added on Sep 27, 2012	PowerEdge KVM 1081AD - 8 Port Keyboard/Video/Mouse Analog Switch:PowerEdge KVM 1081AD - 8 Port Keyboard/Video/Mouse Analog Switch	1,057.70 USD EA	1	1,057.70 USD
	Part Number 225-1815			
	Manufacturer Info 225-1815 - (Dell)			
	Contract <i>None selected</i> choose contract...			