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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 Jennifer Jones, Purchasing System Specialist, jpjones@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 users and new and existing forms, should contact Cyndy Smith, Purchasing IS/Reporting Manager, csheehy@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.
Enter your Novell/Banner/CougarMart User Name and your assigned Password. You may either use Microsoft Internet Explorer or Mozilla Firefox. The eProcurement application has been tested for both browsers.
The Home (landing page) will be similar to the one below depending on the roles you are granted.

Help

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

Navigation

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

The landing page allows requestors to search for goods and services from contracts and Showcased Suppliers.
The Orders and Documents menu allows you to search for documents, use saved searches, and download exported files.

The Catalogs and Contracts menu allows you to search for or review contracts.

Your Profile and Logout are available from your username drop down.

**Action Items** can be accessed from the top of the landing page.
The message board on the left hand side of the page displays Welcome to CougarMart! followed by hyperlinks to the CougarMart Approver and Requisitioner Guides, Administrative Resources (Collin College website, Purchasing and CougarWeb, Purchasing), and the Technical Requirements to run the application.

Approving Requisitions

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

1. Login to CougarMart.
2. Go to the **Orders and Documents** menu and choose **My Approvals**.
3. The default view will be **Group Results By**: Folders with the folder(s) collapsed. To expand the folder and view all requisitions, left mouse click on the expand all, or left mouse click on the right pointing triangle beside the folder that you want to work with.

4. Once you have expanded the folder or folders, you have the option to hide requisition details.

5. You can select the header-level checkbox to apply the Assign action to all documents, and click on Go to assign them to yourself; or you can assign individual documents by checking the box beside the document, apply the Assign action, and click on Go to assign them.
6. There can be both Not Assigned and Assigned requisitions in approval folders. All requisitions must have a state of Assigned before they can be approved. You can determine the State of a requisition by looking at the Assigned Approver column. If a requisition is Assigned it will contain the Assigned Approver’s name. On the left side of the page, there are criteria under Refine Search Results. The criteria are Type, Date Range, View Approvals For, Folders, Current Workflow Step, Assigned Approver, State, Department, Form Type, Prepared By, Prepared For, Status Flags, Supplier, and Priority. You can use the State filter of Not Assigned to see the requisitions that need to be assigned then remove the filter to see all requisitions that need to be approved.

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

7. To review a document before approving, you can either left mouse click on the document number to open the document, or left mouse click on the Quick View icon beside the document number.
8. After you have reviewed the document, you can choose an action from the Available Actions drop down menu above the document if you have linked from the document number, or

If you are using the Quick View your only options will be to Approve.
9. When you chose the Return to Requisitioner action and left mouse click on the **Go** button, the requisition will be returned to the person that entered it to make the required changes.

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

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

Breadcrumbs, indicated by the down pointing triangle in the screen navigation, allow a user to more quickly navigate to other parts of the menu.
Always remember to click on the white "logout" link at the very top of the window to close out your session.

Approvals via Mobile Devices

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

1. Login to CougarMart using your network/e-mail username and password.

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

3. In the My Profile under User Information and Settings, left mouse click on the User’s Name, Phone Number, Email, etc. link.
4. Scroll to the bottom of the page and enter a minimum of four characters as your Email Approval Code. (For security purposes, 10 bullets (••••••••••) will be displayed no matter how many characters your approval code is.)

5. Save.

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

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

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

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

2. Left mouse click on the **Assign Substitute to All Requisition Folders** button, or left mouse click on the checkbox beside the folders that you want to individually assign and left mouse click on the **Go** button to Assign Substitute to Selected Folders.
3. You will be given an **Assign Substitute** window. If you left mouse click on the Include Date Range for Substitution checkbox, you will be given the option of selecting an approver and setting a Start Date and End Date.

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

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

**NOTES:** As with all technology and information resources of Collin College District, User Names and Passwords in CougarMart should not be shared.
The assignee should ideally be at the same administrative level or higher, must have gone through CougarMart training, and be set up as a user in CougarMart.

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

![Image of CougarMart interface showing substitution settings]

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

**Document Search**

The simple **Document Search** is similar to the simple product search from the **home/shop** tab. If you leave the search on All Documents you will get both purchase orders and requisitions. You can use the drop down to change from searching All Documents to search for either Requisitions or Purchase Orders.

![Image of CougarMart interface showing document search]

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

By left mouse clicking on the advanced search link below the simple search,
you can enter other search criteria.
Once your search is complete, your search criteria will be displayed on the left with other options to **Refine Search Results** and your documents will be displayed on the main part of the screen.
If you choose to Search by only Requisitions or Purchase Order instead of All Documents, you will get additional search criteria such as **Prepared by, Contract Number, Workflow, Workflow Status, Status Flags,** and **Custom Fields.** The **Custom Fields** include Account and Index.
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.

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

Passwords

The CougarMart eProcurement application uses single sign-on. Your password for the application is the same as your Novell Network/GroupWise/Banner/CougarWeb password. This became effective 8/1/2013. If you need help with your User Name/Password, please go to
http://iws2.collin.edu/techsupport/password/changepw.shtml for instructions on how to change your password, or contact the Help Desk at extension 6555.

For CougarMart access, call the Purchasing System Specialist at extension 3873, or the Purchasing IS/Reporting Manager at extension 3872, or e-mail CougarMartSupport@collin.edu.

**How to Change Your eMail Notifications**

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

2. In the My Profile under User Information and Settings, left mouse click on the Email Preferences link.
3. Left mouse click on the drop down on the right side of the notification you wish to change and make a selection.

![Email Preferences](image)

NOTE: The role that controls whether you receive approval e-mails is the PR Workflow Notification available in the **Shopping, Carts & Requisitions** area.

4. Left mouse click on the **Save** button at the bottom of the screen to save your changes.

5. Return to the **home/shop** navigation tab.
CougarMart Training Website

The CougarMart training website can be accessed through the My Workplace tab. It will be in the eProcurement channel right below the My Workplace tab.