Catalog Request Quick Reference

Catalog Request Overview

HCOM Home Page

Log into HCOM at:
http://vpf-web.harvard.edu/applications

1. Click Personal Homepage.
2. Click Oracle Login via PIN.
3. Login with HUID & PIN.
4. Click HRVD PROCUREMENT.

Marketplace: Shoppers will use the Marketplace to create Catalog Requests. Marketplace Vendors provide an electronic listing of goods and services available through the Marketplace.

Catalog Request: A type of requisition line item selected from a searchable list of commodities with predefined pricing found in the Marketplace. Catalogs are stored internally within the Marketplace.

Catalog Requests are automatically transmitted electronically to the vendor after approval and invoices are received centrally.

Catalog Requests have robust search and browse capabilities. They allow you to search or browse by Supplier or Category, compare goods or services between multiple vendors, and conduct a chemical structure search.

Catalog Requests are most commonly used for lab supplies and associated items.

For Time Out Recovery information, see page 2.

Logout of HCOM after working on Requisitions, click Logout link.

Help Contacts:

For technical issues, contact the HU IT Help Desk:
ithelp@harvard.edu or x6-2001

For customer service issues, contact University Financial Services-AP Customer Service:
ap_customerservice@harvard.edu or x5-8500, option 1.
**Important Note:** If a familiar vendor is not part of the Marketplace either by Punchout or Catalog, create a Non-Catalog Request for the purchase. If the vendor is one with which you repeatedly conduct business and would like to be added to the Marketplace, contact Harvard's Office of Strategic Procurement team via email at procurement@harvard.edu.

Refer to Creating a Non-Catalog Request on Eureka (http://eureka.harvard.edu) for step-by-step instruction for this type of request.

**TIME OUT RECOVERY**

**TIME OUT RECOVERY:** If you are shopping in the Marketplace for longer than 30 minutes, you may find you are timed out of HCOM when you try to submit your Shopping Cart. To retrieve your Shopping Cart, use these steps:

a. Log back into HCOM

b. Select the Marketplace button

c. Select the Shopping Cart icon, then My Carts and Orders, then Time Out Cart Recovery

d. Select Resubmit Cart

e. Complete the **Checkout** process.
Step 1 – Find Goods: Catalog Search and Browse Capabilities

The Simple Search functionality enables you to drill down to all or one product category. You can also enter one or more key words in the text box next to the Go button.

1. From the iProcurement Home Page, click on the Catalog Search button.

2. By default the Catalog Search box/ Product Category defaults to “Everything”. Using the dropdown arrow, change the Product Category if necessary.

3. Enter one or more key words in the text box next to the GO button.

   Note: An “*” can be used in the text box as a wildcard character.

4. The results of your search will be reflected in the Product Search – All page.
Step 1 – Find Goods: Catalog Search and Browse Capabilities, cont.

Quick Order

The Quick Order functionality enables users to automatically add an item to a cart by entering a product catalog number in the Quick Order field.

1. Select the Link from the Catalog toolbar to access the Quick Order panel.
2. Select the Product Category from the dropdown menu if necessary.
3. Add up to five Product Catalog Numbers (SKUs) to the Product Catalog Numbers (SKU) fields.

Note: If there is no exact match or multiple matches found, you are instructed to refine your search or select from the results populated on the newly displayed screen.

4. Click the button at the bottom of the panel.
5. 

Note: If an exact match is found in either the supplier or manufacturer Part Number (SKU) field with a Marketplace hosted Catalog, the item is automatically added to the requisition.

6. Click on the Shopping Cart at the top right of the screen and select Checkout.
7. Then and proceed with the Checkout process.
Browse Suppliers

Browse by Suppliers allows users to see what Suppliers are available, how items and services can be ordered from the Suppliers and what items / item categories are available from the Suppliers.

1. Click on the Browse suppliers link from the Catalog toolbar to access the Browse by Supplier selection.

2. From the listing of Suppliers, locate and click on the appropriate Supplier link.

3. All products listed from the Supplier internal Marketplace catalog will display.

4. Expand the decision tress within the Category Search panel until you locate your items.

5. Click the View link beside your item to display all the products within this sub-category.

6. Select the item you wish to purchase by clicking on the Add to Cart button.

7. Complete the Checkout process.

See HCOM Legends Quick Reference on http://eureka.harvard.edu for more information on the legends listed on this screen.
Step 1 – Find Goods: Catalog Search and Browse Capabilities, cont.

Browse Categories

Browse by Categories provides users access to all hosted catalog data by category and sub-category. This functionality is equivalent to opening numerous paper catalogs from many Suppliers to the same section.

1. Click on the link from the Catalog toolbar to access the Browse by Catalog section.
2. Select a Product Category and drill down to the various sub-categories to view products from all Suppliers.
3. Expand the decision tree until you locate the appropriate sub-category.
4. Click the View link beside your Tool and General Machinery sub-category to display all the products within this sub-category.
5. Select the item you wish to purchase by clicking on the Add to Cart button.

Complete the Checkout process.
Step 1 – Find Goods: Catalog Search and Browse Capabilities, cont.

Browse Chemicals

Browse by Chemicals provides users a Chemical Structure Search that enables searching for chemicals using an exact match, superstructure, substructure, and similarity search based on what the users draws in the search box. Users can also perform a structure search (of any type) in combination with a Product Name, CAS #, Molecular Formula, or Molecular Weight. Users can also choose to search only on fields and not include a structure.

1. Click on the **[Chemicals]** link from the Catalog toolbar to access the **Chemical Structure Search** screen.
2. Use the toolbar on the left-hand side of the page to create your chemical structure. You can also use the various other search fields such as CAS Number, Molecular Formula, etc.
3. Click the **Search** button.
4. Select the **Chemical Structure** you are interested in by clicking on the **Add to Cart** checkbox.
5. Click on the box next to the **Search Catalog** button followed by the **Go** button.
6. The search results are displayed.
7. Select the chemical structure you wish to ass by clicking the **Add to Cart** button.
8. Complete the **Checkout** process.

**Note:** Once you’ve clicked on the **Browse: Chemicals** link, you will have the option of viewing a brief training video on using this functionality.
Step 1 – Find Goods: Catalog Search and Browse Capabilities, cont.

Advanced Search

Advanced Search enables users to enter additional criteria to generate a more specific search result than with a Simple Search. Advanced Searches can be performed for a single category or across all categories. The criteria available within an Advanced Search varies based on the category (s) selected.

1. From the Marketplace, click on the link to access the Advanced Search panel.

2. Utilize the drop down menu to identify a specific Product Category.

3. Select the appropriate fields from this panel to narrow your product selections.

4. Click on the button to activate any or all of the Advanced Search criteria entered.

Advanced Search Fields include:

- **All of these Words**: Only products including the words entered in this field are returned in the search results.
- **Part Number (SKU)**: Enter a single part number or (SKU) for the required products.
- **Supplier**: Enter the Suppliers name into this field to limit your results.
- **Manufacturers Name**: To find products by a specific manufacturer. Search results will include all products from all suppliers who have identified the manufacturer in the product information.
- **Exact Phrase**: Products returned will contain (in the item description) all of the words entered into the Exact Phrase search field.
- **Any of these Words**: Search results will include products containing any of the words entered in this field. Products containing more than one word appear higher in search results than products with only one.
- **Exclude Words**: Products including any of the words entered in this field are not part of the search results. Another search field must be used when using the exclude function.
- **Hide advanced Search on Search Results**: Select this option to hide the Advanced Search input box when search results are displayed. You may select the Advanced Search hyperlink to reopen the Advanced Search input fields.
Step 2 – Filtering and Comparing Search Results

Filtering – Sort by:
Once the search results appear in the Product Search – All page, you may determine that it is necessary to narrow your search further.

Utilize the **Sort by:** field to sort less than 200 items from the Product Search – All page if applicable.

- **Sort by:**
  - Best Match
  - VWR Int.
  - Part Number
  - Description
  - Size
  - Packaging UOM
  - Supplier
  - (Price: Low to High)
  - (Price: High to Low)

Filtering – Filter Results:
Once the search results appear in the Product Search – All page, you may determine that it is necessary to narrow your search further.

- Enter a key word into the **Add Keywords** field. Then select **Go** to filter by that word.

The **Filter Results** pane, offers some additional search functionality. It is possible to focus your search on a particular **Supplier**, **By Supplier Class**, **By Category**, **By Packaging UOM**, **By result Type**, and **By Manufacturer Name**.

Many types of icons are associated with Catalog vendors. These icons provide information for you to make the best selection. For example, there are icons that designate whether the vendor is a minority-owned or a woman-owned business. The icons also list those vendors that offer free shipping for goods or sell recycled goods.

The vendor listed first with the ⚙ icon next to it is a preferred vendor. This is based on the volume of business the vendor does with the University.

Click on the plus sign next to the ⚙ icon to view the options associated with your search. In this case, you are filtering **By Supplier**.

1. Select your supplier from the **Filter By Supplier** box and then click on the **Filter** button.
2. Then select another **Filter Results By** opportunity if needed. The filter options can be used individually or in conjunction with another filter.
Comparing Catalog Items

The Marketplace offers the ability to compare two different vendor items side-by-side.

To create a comparison between two or more vendor items:

1. At the Marketplace – conduct a Simple Search, Advanced Search, Quick Order or Browse to locate your item(s).
   
   Note: An “*” can be used in the text box as a wildcard character.

2. Click the Go button.
3. Once the search results are displayed, use the Filter Results and/or Sort By functionality to narrow the results of your search further if necessary.

4. Click the links for each item you want to evaluate side-by-side.
5. The word compare for all items selected for comparison now read.

6. Click on the Compare Selected: button located at the top right-hand corner of the page.
7. Choose the item you prefer, enter quantity then click on the Add to Cart button.
8. Finally, click on the cart link, on the upper right-hand corner of the screen to add the items to your Shopping Cart and click Checkout.

9. Submit your Catalog Request to HCOM by clicking on the Submit to Oracle button.

Step 3: Creating a Catalog Request

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

Creating a Catalog Order Request:

1. Login to HCOM and access the HCOM Home page.
2. Click on the icon link.
3. Complete the Search, Browse and/ or Filter functionalities, and finalize your purchase selection
4. Enter the quantity of the purchase in the box next to the Add to Cart field.

Note: The drop down arrow next to the Add to Cart button allows you to add your purchase to the Draft Cart or Pending PR/PO status.
### Step 4: Checking Out a Marketplace Order

**1. Shopping Cart Screen**
- Add an **Asset Tag Number**: If applicable to your school.
- Add **Line Level Notes**: Add additional business purpose information to the Line Level Notes section. This information is helpful to Approvers. This information does not appear on the CREW Detail Listing Report.

   You can delete lines from the Shopping Cart by clicking on the ![next to the line.](image)

- Click ![Checkout](image).

**2. Check Out: Requisition Information Screen**
- **Requisition Description**: Enter the business purpose for the overall purchase. **Note**: The contents of this field are searchable if you need to find this text at a later date.
- **Attention field**: Enter the name of the person receiving the delivery.
- **Attention Room/Floor field**: Enter a building or room number. Adding this information is a one-time activity. After entering, set the Attention lines as defaults. Check the box. The content in the Attention fields will automatically appear when you place another order.
- If necessary, modify the default Deliver To Location.
- If necessary, modify the account(s) to which items in the order will be billed by clicking the hyperlinked 33 digit account code. Click the account code again to change the account code. Press ![Apply](image) on each review screen to arrive back at the main screen.

- Click ![button](image).

**3. Check Out: Approvers Screen**
- If necessary, modify the approver(s) by clicking ![Manage Approvals](image). Select one of the following actions to modify approver(s):
  - Add approver
  - Change First Approver
  - Delete Approver
  - Reset Approval List
- Enter an optional **Note to Approver** or **Note to Supplier**.
- Attach any necessary documents to the request by clicking ![Add Attachment](image). (Optional)
- If this is a grant purchase, and an item is over 4,999.99, complete the **Vendor Justification** section. If the If the purchase is over $24,999.99 verify that the **Debarment Form** is on file. (You can download it by clicking on the link.) Refer to the **Completing the Vendor Justification Form Quick Reference** for more information.

- Click ![Next](image).

**4. Check Out: Review and Submit Screen**
- Review and click the ![Submit](image) button.

   **Optional**: If you wish to print the Requisition prior to submittal, click the Show Link, then ![Printable Page](image).

   **Note**: It is possible to add additional line items to a requisition throughout the Check out Process prior to submitting the requisition. Click the **Shop** tab to access the Marketplace and locate your additional item. The items will be consolidated into one requisition once you return to Oracle.

**After the Marketplace Requisition is Created**
- Forward to an Approver
Step 5: Receiving

- Receiving is required for:
  - All purchases >$2,499.99
- If you are a Shopper/Approver with Self-approval privileges, Self-approval is not allowed for purchases over $2,499.99 or sponsored purchases regardless of the amount
- Receiving functionality is still available for purchase orders under $2,500, but does not affect two-way-match or payment. This can be used for reporting purposes if required by the department.

Receiving a Marketplace Order

**Rules of Thumb**

- If all the goods you ordered are delivered, receive all the goods.
- If only a portion of the goods are delivered, receive only what was delivered.
- If all the goods are delivered and you need to return one or more items, receive all the items and process the returns.

Refer to the [Holds, Receiving, and Returns Quick Reference](#) for more information on receiving goods.

**Receiving the Order:**

1. Click the Receiving tab.
2. Click the hyperlinked number of the Requisition to receive.
3. Click the Receive button.
4. Click the Select checkbox beside each line item to receive.
5. In the Receipt Quantity column, indicate the quantity that was invoiced.
6. Click the Submit button.
7. If desired, enter Receipt Comments.
8. Click the Submit button.
9. Review the information entered. If everything is correct, click Submit.