Overview of HoundMart eProcurement Module and Benefits

The HoundMart eProcurement module allows designated Loyola employees to shop online, place orders and track approvals using preferred vendors. SciQuest is Loyola’s eCommerce vendor.

Using eProcurement will help Loyola:

- Automate order placement, approvals and tracking making procurement faster, more accurate and less expensive
- Centralize all purchasing in one system to allow better tracking of spending against department budgets
- Automate approvals using built-in budget thresholds
- Minimize costs and increase efficiency both in purchasing and in accounts payable
- Reduce its fiscal year end spending pattern

Purpose of this Guide

This training guide will show you how to:

- Access the HoundMart application
- Identify menu items on the HoundMart Home Page
- Browse catalogs, search for items, add/remove cart items, submit a requisition and/or assign a cart to someone else for approval
  a. Using a Hosted Catalog
  b. Using a Punchout Catalog
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Access HoundMart Application

1. Go to the Inside Loyola portal:  https://inside.loyola.edu and log in with your AD username and password.
2. Click on the Applications tab.
3. Click on HoundMart.

4. Enter your Loyola username and password, then click Sign in.
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HoundMart Home Page Overview
Once logged in, you will see a screen similar to the one below. Depending on what roles and permissions are assigned to you, the menu items displayed may be different.

The diagram below provides a short description of the top and left menu items. The Home page is also the Shopping Home page.

This guide will focus on the Shop (eProcurement) module.
Our **Showcased Vendors** include Hosted Catalogs and Punchout Catalogs. A Hosted Catalog is hosted *inside* the HoundMart application, whereas a Punchout Catalog is hosted partially *outside* of the HoundMart application. The procedures for ordering from each type of catalog are slightly different. This guide will show you the steps for ordering from each type, starting with Hosted Catalogs.

**Shop using Hosted Catalog**

1. To start, you can either: (a) search for an item (using an item number or product type) or (b) select one of the Hosted Catalogs.
   a. From Shopping Home page, enter key word(s) in Search box at the top OR
   b. Click on a hosted catalog and do one of the following:
      i. Enter an item number or product type, then click **Return/Enter** or the magnifying glass.
      ii. Click **Return/Enter** or the magnifying glass to go to the catalog.
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2. To add an item to your cart, enter the Quantity desired next to the item and click Add to Cart.

3. To compare products and pricing:
   a. Click Compare next to each item you want to compare.

   b. Click Compare Selected in upper right.

   c. 

   d. Comparison results:
      i. Enter Quantity of desired item and click Add to Cart.
      ii. Click Back to Search Results in upper or lower right to go back.
4. To view your cart:
   a. Click the shopping cart in the upper right for a quick view.
   b. Then, click View My Cart for a more detailed view.

5. To checkout:
   a. Click Checkout from the Shopping Cart quick view or click Proceed to Checkout from the Shopping Cart detailed view.
   i. Depending on your assigned role(s), you will be able to submit the requisition yourself or assign the cart to someone with requestor authorization.
      • Shoppers can only Assign Cart to someone else.
      • Requestors can Submit Requisition or Assign Cart to someone else.
b. Enter shipping information:

Note: You can set the shipping address as the default address, so you don’t have to enter it for each order. See Step iv. below for instructions.

i. Click on Shipping from left menu, then Address is incomplete.

ii. Select a building from the Shipping address drop-down menu.

iii. Enter a floor number (REQUIRED), then click Save.
iv. To set the shipping address as the default:

- Click on View my Profile on the top right.

- Click on Default Addresses.
• Click on **Select Addresses for Profile**, then choose building from drop-down menu.

• Enter floor number, then click **Save**.
c. Enter Accounting information:
   
   *Note: You can set a default GL code, so you don’t have to enter it for each order. See Step IV below for instructions.*

   i. Click on **Accounting Codes** from left menu, then click **Required field**.

   ![Accounting Codes](image1)

   ii. Click **Select from profile values**.

   ![Select from profile values](image2)

   iii. Click the drop-menu and select the appropriate value, then click **Save**.

   ![Save button](image3)
iv. To set a default GL code:

- Click on View my Profile on the top right.
- Click on Custom Field and Accounting Code Defaults, then Code Favorites, then Add.
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- Enter a nickname for the GL code, click on Select from profile values and select appropriate code, check the Default option, then click Save.

![Accounting Codes](image)

- **d. (OPTIONAL) Add an internal or external note or attachment:**
  
  You may wish to add an external note (ex. Instructions for ordering something live) or attachment that goes to the vendor (ex. quote) or an internal note and attachment viewable only by Loyola (ex. email from director giving permission for order to be placed)
  
  i. Click on Internal or External Notes and Attachments.
  
  ii. Click edit on right to add a note, enter a note, then click Save.
  
  iii. Click Add Attachments to add an attachment.
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e. (OPTIONAL) To remove items from your cart:
   Note: You will only be able to do this step for Hosted catalogs and some Punchout catalogs.
   i. From the detailed view of the cart, put a check mark next to the item you wish to remove.
   ii. Click on the drop-down menu above it and select Remove Selected Items, then click Go.

f. Final Review
   i. Click on Final Review from the left menu to review your order, paying close attention to the GL code, shipping address, quantity, and item number.

g. Submit Requisition or Assign it to someone else
   i. Click Submit Requisition (if you are a Requester) or Assign Cart (if you are a Shopper).

   ii. To view the approvals, click on View Approval Status.

   ![Image of cart removal process]

   ![Image of requisition submission]

   ![Image of next steps]

Next Steps
You can view or print this at: Requisition 1714192, or via the Document Search page

- View Approval Status
- Search for another item
- View order history
- Check the status of an order
- Return to your home page
- Create new draft cart
iii. Example of approval workflow and description of steps:

Emails are sent to the approvers once the requisition is submitted. Requesters do not need approval for orders within their budget authority.

- **Initial PR Validation** checks Colleague to see if budget is there
- **Financial Approval** is usually your supervisor
- **Final PR Validation** sends message to SciQuest that the funds have been encumbered for the purchase

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**PR Approvals**

<table>
<thead>
<tr>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td></td>
</tr>
<tr>
<td>Gretchen Cannon</td>
<td></td>
</tr>
<tr>
<td>11/21/2016 10:22 AM</td>
<td></td>
</tr>
</tbody>
</table>

**Initial PR Validation**

- Active
- View approvers

**Financial Approval**

- Future
- View approvers

**Final PR Validation**

- Future
- View approvers

**Create PO**

- Future

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**Notification Email examples**

**Approval Required Email Example**

Approvers receive a notification email like the one below for orders requiring approval. If you are an approver, you can click the link inside the email to approve the order.

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**From:** procurement@loyola.edu | **to:** Nancy Wright <nancy.wright@loyola.edu>

**Subject:** ATTENTION REQUIRED** You have purchase order(s) pending for approval

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Re: Reminder for purchase order(s) pending approval in workflow step
Folder: Invalid Distribution

Dear Nancy Wright,

The following purchase order(s) are in a shared folder pending approval:

Purchase Order # P00023 entry submitted since 10/20/2016

Please "Approve or Reject" as soon as possible.

You can approve or reject purchase order(s) on line by clicking the URL below:

https://solutions.scquest.com/apps/MYUer?TOMyApprovals?
EventLink=basic&mdmp=1477258125880&AuthUser=559049

Thank you,

Loyola University Maryland
Workflow Completed Email Example

From: procurement@loyola.edu <procurement@loyola.edu>
Sent: Friday, December 2, 2016 9:13 AM
To: Nancy Wright
Subject: Workflow Routing Completed for Requisition: 820160039

Re: WORKFLOW ROUTING COMPLETED FOR REQUISITION: 820160039
Cart Name: 2016-12-02 nbwright 01
Prepared by: Nancy Wright

Dear Nancy Wright,

The requisition listed above has completed workflow routing. Purchase Order(s) will be generated from this requisition. You can update and track the status of purchase orders on line by using "Document Search" or by selecting the URL below.

View Requisition

If you have any questions with regard to this requisition, please contact your SelectSite Support Team.

Support Team Contact Information: procurement@loyola.edu

Thank you,
Loyola University Maryland

Shopping Cart Assigned Email Example

From: procurement@loyola.edu <procurement@loyola.edu>
Sent: Tuesday, October 18, 2016 10:10 AM
To: Gina Graffious
Cc: Anthony Forte
Subject: A shopping cart has been assigned to you

Re: A shopping cart has been assigned to you
Cart Name: 2016-10-18 aforte 01
Prepared for: Anthony Forte (Department: Business Services)
Prepared by: Gina Graffious

Dear Gina Graffious

A shopping cart has been assigned to you by Anthony Forte (aforte@loyola.edu). The shopping cart can be accessed for review in "Draft Carts" or by selecting the URL below.


If applicable, the user has submitted the following additional comments:

If you have any questions with regard to this shopping cart, please contact your SelectSite Support Team.

Support Team Contact Information: procurement@loyola.edu

Thank you,
Loyola University Maryland
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Purchase Order Created Email Example

From: procurement@loyola.edu <procurement@loyola.edu>
Sent: Friday, December 2, 2016 9:14 AM
To: Nancy Wright
Subject: Purchase Order #: PO000093 has been sent to the following vendor: Staples

Re: PURCHASE ORDER #: PO000093
Cart name: 2016-12-02 nthwright 01
Requisition number: 82016019
Vendor: Staples
Sent Via: XML
Date/Time: 12/2/2016 9:13 AM

Dear Nancy Wright,

The purchase order listed above has been created for your requisition "2016-12-02 nthwright 01 (82016019)" and has been sent to the vendor. You can update and track the status of this purchase order on line by using "document search", or by selecting the URL below.

View Purchase Order

If you have any questions with regard to your purchase order, please contact your SelectSite Support Team.

Support Team Contact Information:
procurement@loyola.edu

Thank you,
Loyola University Maryland

Requisition Returned Email Example

From: Loyola SelectSite - please do not reply to this email
Sent: Monday, October 17, 2005 12:17 AM
To: Nancy Wright <nthwright@loyola.edu>
Subject: Your Requisition has been returned. Requisition #: 1006540

Re: Requisition Returned For Requisition #: 1006540
Cart Name: 20161017-nthwright-1

Returned by:

Dear Nancy Wright,

The requisition listed above has been returned by an approver.
You can review a read only version of this requisition by selecting the URL below.

View Requisition

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If you have any questions with regard to this requisition, please contact the assignee who returned the requisition or your SelectSite Support Team.

Support Team Contact Information:
procurement@loyola.edu

Thank You,
Loyola University Maryland

Notification that PO is sent to Vendor

From: procurement@loyola.edu <procurement@loyola.edu>
Sent: Friday, December 2, 2016 9:14 AM
To: Nancy Wright
Subject: Purchase Order #: PO000093 has been sent to the following vendor: Staples

Re: PURCHASE ORDER #: PO000093
Cart name: 2016-12-02 nthwright 01
Requisition number: 82016019
Vendor: Staples
Sent Via: XML
Date/Time: 12/2/2016 9:13 AM

Dear Nancy Wright,

The purchase order listed above has been created for your requisition "2016-12-02 nthwright 01 (82016019)" and has been sent to the vendor. You can update and track the status of this purchase order on line by using "document search", or by selecting the URL below.

View Purchase Order

If you have any questions with regard to your purchase order, please contact your SelectSite Support Team.

Support Team Contact Information:
procurement@loyola.edu

Thank you,
Loyola University Maryland

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Check the status of your order
Before submitting your requisition or assigning your cart, you have several ways to check the completeness of your order. You will either be prompted with a pop-up alert at the top of the page if you try to submit an incomplete requisition or you can check for completeness by viewing the menu on the left.

To check status of order:
1. Status alert at top indicates incomplete information
2. Menu on left also indicates complete & incomplete sections:
   - Green check = Complete
   - Gray check = Incomplete
Shop using Punchout Catalog

Note: Always access the punchout catalog websites through SciQuest to receive the contracted price, even if the vendor has sent you promotional e-mails.

1. Select one of the Punchout catalogs.

a. You will be taken out of HoundMart (SciQuest) and into a version of the vendor’s website made specifically for Loyola University Maryland (note the Loyola crest next to the vendor’s name).
   a. To search for a product, enter a key word or item number in the Search box and click Return/Enter. To go back, click on Cancel Punchout.
   Note: On Contract – means Loyola has negotiated pricing with vendor
2. To add an item to your cart, enter the quantity desired and click **Add**.

3. To compare products and pricing:
   a. For each item you want to compare, click next to **Compare** (on the right) to add a check mark, then click **Compare** in the upper left.
4. To view your cart:
   a. Hover the mouse over the shopping cart in the upper right for a quick view or click on it for a detailed view.

5. To checkout:
   a. Click **Review & Checkout** to review the information first.
   b. To remove items from your cart, click **Remove** next to the item (this is an example, may differ depending by vendor/catalog)
c. Click **Submit Order** after you have reviewed the information.

d. You will be taken back to HoundMart. From here, follow the instructions starting with step 5 on page 5.

*An important difference when ordering from a Punchout catalog:

Once you proceed to checkout and submit the order, you cannot remove any item, so it is critical to verify the order before clicking **Proceed to Checkout**.
How to Search Carts and Orders

1. Select the **Shop** option from the left menu, then click on **My Carts and Orders**.

2. Select either **Open My Active Shopping Cart** or **View Draft Shopping Carts** to see, open, or remove carts.

3. Select **View My Orders (Last 90 Days)** to see a list of all orders you have created.

4. You may refine search results using options in the left menu or sort them using the **Sort by** drop-down menu.
How to Search Documents (Requisitions, Purchase Orders)

1. Select the **Documents** option from the left menu, then click on **Search Documents**.

2. Select either **Requisitions** or **Purchase Orders** from the drop-down menu on the left, enter any search terms (like document numbers, vendors or product information), enter any dates needed, then click **Go**. Alternatively, you can click **Go** to see everything.
**Receiving**

There is no Receiving necessary – it is automatic – for purchase orders less than $1,000.

**Receiving Instructions for Purchase Orders over $1,000**

Purchase orders over $1,000 will need to be Received manually in the system.

1. **Retrieve the purchase order of interest using the Search Documents feature.**
   a. Click on Documents in the left menu, then Search Documents.
   b. Enter search terms such as document numbers, vendors, or product information.

2. Click the blue purchase order number to enter into the PO, then click the Document Actions drop-down menu.

3. Select Create Quantity Receipt.

![Screenshot of Search Documents and Create Quantity Receipt](image.png)
4. Where indicated in the yellow boxes, enter the quantities received for each line of the purchase order and then click on **Save Updates**. If applicable, the quantities returned or canceled can also be entered, using the drop down menu under **Line Status**.

5. (Optional) You may also enter the packing slip number. SciQuest will automatically enter the Receipt date and time.

6. Click on **Complete** and SciQuest will automatically issue a Receipt number.
Note that under **Search Documents** the **Settlement Status** now indicates that the purchase order is **Fully Received**. It is still reporting **No Matches** since the vendor’s related invoice has not yet been received by Loyola.

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**Invoices**

When the purchase is approved and made in SciQuest using the appropriate GL #, the funds are immediately encumbered through Colleague. And then the invoice, when it arrives through the system, is automatically paid through those encumbered funds. Payments to vendors for purchases made through SciQuest then flow to Loyola’s Accounts Payable Department workflow, whereby the funds are disbursed.

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**About Returned Requisitions**

**If you are a Buyer:**

Requisitions can be returned at any point in the requisition approval process (for example, if the Buyer doesn’t have access to the GL # used in the order). When a requisition is returned it becomes a draft cart and is no longer visible as a requisition. Changes (i.e., GL #s, quantities, etc.) can be made to the requisition while in a draft cart.

End users have access to view returned requisitions from their homepages and in a new section in the Draft Carts tab named “my returned requisitions.” Returned requisitions cannot be deleted; however they can be withdrawn.
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eProcurement Dictionary

**Approver** – An approver plays a key role in workflow. In ePro, the approver can see the GL # under which the funds are being set aside for the pending purchase and once the requisition is approved and becomes a purchase order, the funds in Colleague are immediately encumbered.

**Encumbrance** – This is the commitment of funds to purchase an item. A requisition encumbers (sets aside) funds for a particular future purchase.

**eProcurement** – (“ePro”) Conducting some or all of the procurement or purchasing function over the internet. Also sometimes referred to as “eCommerce” or “B2B” (Business-to-Business).

**Favorites** – In ePro, it’s possible to specify certain products purchased regularly from hosted catalog suppliers. It’s also possible to specify a general ledger number associated with a shopper’s login name for convenience, if all purchases over time are repeatedly made from the same GL#. Contact procurement@loyola.edu for assistance if you are interested in setting up favorite products or a default GL # for purchases.

**Hosted Catalog** – In ePro, these vendor catalogs are static catalogs hosted and maintained by SciQuest. Hosted catalogs generally offer only a limited sampling (Loyola’s most frequently purchased products) of the vendors’ total offerings. Product prices and offerings generally are static (change infrequently).

**HoundMart** – Loyola’s brand new custom-designed marketplace.

**Non-Catalog Item** – In ePro, use this option to order from a supplier who does not offer a hosted, punchout or an online catalog. It is more or less a free form electronic ordering form whereby the vendor information is added by the shopper / user. The supplier can be an established Loyola vendor or a new one. See also “Supplier.” (Please note however, that our Amazon.com punchout catalog cannot accept non-catalog orders.)

**Procurement** - The act of obtaining or buying goods and services. The process is most frequently handled on a competitive basis and includes preparation and processing of a purchasing need as well as the end receipt and approval of payment. It often involves planning, standards determination, specifications development, supplier research and selection, value analysis, financing, price negotiation, contract administration, inventory control and disposals.

**Punchout Catalog** – In ePro, offers users the capability of shopping directly from a vendor’s external website and then returning to the SciQuest format to checkout (purchase) items placed in the cart. Punchout catalogs are dynamic, hence users might notice day-to-day price and product changes, in this shopping scenario.

**Purchase Order (PO)** – A purchaser’s printed document to a vendor formalizing all the terms and conditions of a proposed transaction, such as a description of the required items, delivery instructions and schedule, and terms of payment. Think of it as a finalized requisition.

**Quick Order** – In ePro, this is ideal for regularly ordered items from hosted catalogs only, for which the purchaser knows the SKU / item numbers. The items are placed directly into the cart and the quantities are specified just prior to checkout. It’s convenient for when no product browsing is necessary.

**Requisition** (“req”) – An internal request whereby a campus department sends details of supplies, services or materials required to be purchased. Also known as a Purchase Requisition or “PR.” Once submitted, a requisition will enter...
workflow and automatically be assigned a number by SciQuest. It’s a good idea to take note of this number. A returned requisition means that the creator of the req did not have access to the GL account linked to the req or exceeded his or her dollar threshold in spending. A rejected requisition is dead and unrecoverable.

**Requester** – In ePro, anyone who prepares and submits requisitions.

**SciQuest** – Loyola’s e-commerce vendor. It services and provides maintenance on Loyola’s Sourcing, e-Pro and Contract modules. Its name denotes its history as an early ePro vendor of primarily science and lab supplies.

**Shopper** – In ePro, anyone who browses catalogs, prepares carts and assigns them to an Approver.

**Sourcing** – The process of identifying and selecting the supplier whose costs, qualities, technologies, timeliness, dependability, service and product offerings best meet the purchaser’s needs. The Sourcing requirement notification will be automatically triggered in workflow if the pending procurement exceeds $10,000.

**Supplier** – A vendor or seller of goods / services. It is critical that the vendors’ email addresses be verified and updated in order for Loyola’s purchase orders to be received. For the time being in ePro, vendors new to Loyola will need to be entered in both Colleague (first) and SciQuest. If there are questions on this, please contact procurement@loyola.edu.