Harvard SEAS HCOM Shoppers Training
Topics covered

• Types of requisitions
• Procure-to-Pay process
• Standing orders
• Returning items
• Cancelling/ changing orders
• Additional forms/ requirements
• Vendor request
Types of requisitions

• **Purchase order:**
  The preferred method of shopping at the University.
  - Marketplace purchase
    - purchase through the ‘Shop’ feature in iProcurement
  - Non-catalog purchase
    - purchase using the ‘Non-catalog order’ tab
    - also used to create standing orders

• **Payment Request**
  - after-the-fact invoice payment

• **Non-Employee Reimbursement**
Setting your preferences

Accessed by clicking on the Preferences link in iProcurement

- Under ‘Notification Mailer Preferences’ select type of email you would like to receive when your requisitions are approved or have been modified.
- The email address your notifications are sent to is pulled from Peoplesoft – contact HR or Registrar’s office if you need to update it.
Setting your preferences

The system will allow you to default a number of values, including:

- The preferred number of days between the date an order is placed and the item(s) are delivered
- The name of the person who placed the request
- A default delivery location
- Frequently-used charge accounts (33-digit number lists)
HCOM Marketplace purchase

Accessed by clicking on the HCOM Marketplace button to access over 200 suppliers’ catalogs

After requisition is complete and the final approval is granted, the order gets sent directly to the vendor.

Note: HCOM orders (PO number starts with 4000…) cannot be changed or cancelled by the shopper in the iProcurement system.
The Marketplace sits between Oracle and the vendors, creating a point of integration that allows purchasers to bring vendor item information back into Oracle for use in creating a Purchase Order.

Marketplace technology is facilitated by SciQuest

Punchout Requests differ from Catalog Requests only in where the searchable list of commodities is stored. Punchout catalogs are stored externally on the vendor’s website; Catalogs are stored internally within the Marketplace.
Non-catalog purchase

Accessed by clicking on the ‘Non-catalog’ link in the home screen

The purchase information needs to be entered manually.
Non-catalog purchase cont.

In all search fields in Oracle you can use % as a wild card. Search for the Vendor Name as well as the appropriate Vendor Site (verify with the ‘Pay to:’ section on the quote/invoice)
Enter the relevant information as shown (this should be readily available to you from a vendor quote, or website), then **Add to Cart** – bottom right of the screen. The Item Description is very important, as changes cannot be made to a non-catalog PO once approved. The description should include catalog number and description of the item to be purchased. The revisions to these orders are limited to Need by Date, and Total Price. Once all of the information is added, click **View Cart and Checkout**.
When creating an order based on a quote, select ‘Goods or services billed by amount’ from the dropdown menu under ‘Item type’. This will create a PO for the total dollar value of the quote and multiple invoices will be accepted against it.

This option can be used for standing orders as well.
Non-catalog purchase cont.

Please note the screen below:

- Quantity is 2000. Price is 1 USD.
- This is necessary in order to receive a specific invoice amount when billed each month. If the PO is not created in this manner, receipt of an invoice can only be made once and the PO will then be closed by AP.
- If necessary, notify the vendor that the invoice must be sent to you directly.

The balance will diminish as you receive against the PO.
Checkout process

- Your deliver-to location must be accurate (list of locations with H-codes attached), in order to avoid loss of product or delays in delivery. The ‘Requester’ field does not go on the shipping label; make sure to include your name on the ‘Attn of Name/Department’ line.
- You must enter a clear Requisition Description, linking the purchase to a project.
- The Receiving Required for Payment box must be checked. Once your product is delivered to you, please electronically receive in the system (receiving info to follow).
• The Charge Account section must be accurate. This automatically populates with the default account that was assigned to you upon being granted iProcurement access. Please ensure that the correct object code is listed, and change the account if needed. To change the costing string, click on the link, change the code to the one that matches your purchase, click apply. Click next to move forward with submission of the requisition.

• Standing orders have an option to have the invoice sent somewhere other than the default Central AP mailing address. You can uncheck the box and provide your address in the fields provided.
Checkout process cont.

- To add an attachment (quote, invoice, additional documentation), you must first save the attachment to a file. Hover over the Add Attachment link, select File from the drop down. Add a title. Select the file to attach. Remember to SAVE before proceeding!

- You may also add a note to the supplier in the box to the right. Please notify vendors (and your approvers) directly if there are specific mailing/delivery instructions. A handful of vendors do not receive the notes.

- For Linde and Airgas orders, the account number assigned to your lab or location, must be included in this space, along with other notes.
Checkout process cont.

- In some instances you may need to modify your default approval hierarchy.
- You may ‘Add an approver’ if necessary, by clicking the radio button and adding the preferred approver’s name (Last, First), and clicking the flashlight to search.
- If you need to route your requisition through a different approval structure (ie. different Harvard school, etc.) select the ‘Change First Approver’ option and select the appropriate replacement for your default approver.
- Vendor Justification Form section is required for federally sponsored purchases over $5,000. Attach backup documentation as attachment upon filling the section out.
- Once this step is complete, click submit to return to your previous page.
Placing orders with the vendor

- HCOM orders are transmitted to the vendors automatically.
- Non-catalog vendors have to be sent to the vendor; otherwise the order doesn’t get placed.
- Upon receiving a notification that your requisition has been approved, copy the PO number from the email (starts with 700...)
- In the ‘Requisitions’ tab click on ‘Search’ and paste the 7000... number
• Open the PDF file (to the right of the requisition) and email to the vendor.
• The email is usually provided in the quote; if not – look for a sales email on the company’s website.
## Common object codes

<table>
<thead>
<tr>
<th>Common object codes</th>
<th>When to use</th>
</tr>
</thead>
<tbody>
<tr>
<td>6600</td>
<td>Lab supplies</td>
</tr>
<tr>
<td>6640</td>
<td>Office supplies – cannot be charged to government accounts</td>
</tr>
<tr>
<td>6660</td>
<td>Computer supplies – up to $500 per item, if larger use object code 6750</td>
</tr>
<tr>
<td>6710</td>
<td>Computer software</td>
</tr>
<tr>
<td>6811</td>
<td>Fabrication – Non-sponsored &gt;= $5000</td>
</tr>
<tr>
<td>6812</td>
<td>Fabrication – Sponsored &gt;= $5000</td>
</tr>
<tr>
<td>6813</td>
<td>Equipment – Non-sponsored &gt;= $5000</td>
</tr>
<tr>
<td>6814</td>
<td>Equipment – Sponsored &gt;= $5000</td>
</tr>
<tr>
<td>6750</td>
<td>Computer hardware – between $500-$4999 per item</td>
</tr>
<tr>
<td>6770</td>
<td>Rental of equipment</td>
</tr>
<tr>
<td>8050</td>
<td>Book binding</td>
</tr>
<tr>
<td>8091</td>
<td>Repair of computer hardware</td>
</tr>
<tr>
<td>8140</td>
<td>General repairs, non-computer repairs and maintenance fees</td>
</tr>
<tr>
<td>8230</td>
<td>Rental of uniforms – or purchase and laundry service of uniforms</td>
</tr>
<tr>
<td>8360</td>
<td>License fees</td>
</tr>
<tr>
<td>8540</td>
<td>Photocopying + duplicating</td>
</tr>
<tr>
<td>8570</td>
<td>Copyright fee/ royalty fee</td>
</tr>
<tr>
<td>8700</td>
<td>Postage</td>
</tr>
</tbody>
</table>

*Sponsored fund range: 100000-299999*
Receiving orders

- Electronic receipt is required for the invoice to get paid
- If all the goods you ordered are delivered, receive all the goods (‘Express receive’)
- 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 return
Returning orders

• Order first has to be received in iProcurement
• Reasons for return include:
  o overshipped,
  o damaged,
  o quality,
  o incorrect goods
• Obtain RMA # from vendor (if needed, contact Financial Operations Office for assistance)
• Complete return in iProcurement
• Ship item back
Completing a return in HCOM

### Receiving Process
- **Receive**: Record receipt of the items you ordered, or receive on behalf of others.
- **Receive Items**
- **Return**: Need to send items back to the supplier?
- **Return Items**
- **Correct**: Did you record the wrong receipt quantity?
  - **Correct Receipts**

#### Requisitions to Receive

<table>
<thead>
<tr>
<th>Requisition</th>
<th>Requisition Description</th>
<th>Supplier</th>
<th>Order Number</th>
<th>Express Receive</th>
</tr>
</thead>
<tbody>
<tr>
<td>S161617</td>
<td>Procurement supplies</td>
<td>GOVCONNECT INC</td>
<td><strong>40000693713</strong></td>
<td></td>
</tr>
<tr>
<td>S163475</td>
<td>Procurement supplies</td>
<td>W B MASON COMPANY INC</td>
<td><strong>40000692555</strong></td>
<td></td>
</tr>
</tbody>
</table>

#### Find Receipt

- **Receipt Created By**: Curry, Joanna A
- **Include people from all organizations**: 
- **Items Received**
  - Last 7 Days
  - Enter at least one additional search criterion when selecting Items Received Any Time

### Return Information

<table>
<thead>
<tr>
<th>Receipt</th>
<th>Requisition</th>
<th>Description</th>
<th>Return Quantity Unit</th>
<th>Quantity Received</th>
<th>Supplier</th>
<th>Order Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>52967</td>
<td>S161117</td>
<td>Coffee services for 29 University Rd</td>
<td>Each</td>
<td>250.9</td>
<td>ATLANTIC COFFEE AND PROVISION LTD</td>
<td>70000690851</td>
</tr>
<tr>
<td>53109</td>
<td>S161117</td>
<td>Coffee services for 29 University Rd</td>
<td>Each</td>
<td>165.25</td>
<td>ATLANTIC COFFEE AND PROVISION LTD</td>
<td>70000690851</td>
</tr>
<tr>
<td>53162</td>
<td>S163475</td>
<td>Coffee, Dreams Design, 50/Pack</td>
<td>Each</td>
<td>1</td>
<td>W B MASON COMPANY INC</td>
<td>40000692555</td>
</tr>
<tr>
<td>53162</td>
<td>S163475</td>
<td>Notebook/LCD Privacy Monitor Filter for 21.3 Notebook/LCD Monitor</td>
<td>Each</td>
<td>0</td>
<td>W B MASON COMPANY INC</td>
<td>40000692555</td>
</tr>
<tr>
<td>53162</td>
<td>S163475</td>
<td>Stainless Steel Office Ruler With Non Slip Cork Base, 12”</td>
<td>Each</td>
<td>2</td>
<td>W B MASON COMPANY INC</td>
<td>40000692555</td>
</tr>
</tbody>
</table>

- **Indicates an adjusted receipt quantity**
- **TIP**: Use the Previous/Next navigation tool to make selections across multiple pages.

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**Cancel**  **Clear Changes**  **Step 1 of 3**  **Next**
Completing a return in HCOM

Shipping

In order to ship a package via Fedex please fill out the Fedex airbill and bring the package to the Loading Dock in the LISE Building or 52 Oxford Street. There are carts available in the loading dock area as well as some packing materials. If help is needed with larger packages, please contact:

§ 9 Oxford Street (for LISE, McKay, Pierce, Maxwell Dworkin, Cruft buildings)
Please contact Allison Galipeau: tel: 617-496-4489 email: agalipeau@fas.harvard.edu

§ 52 Oxford Street (for Northwest, ESL 58 Oxford St and 60 Oxford St. buildings)
Please contact Alfred Trainor: tel: 617-496-5432 email: ajtrain@fas.harvard.edu
Holds resolution

- Email notification from noreply-apollo26@harvard.edu
- **Receiving Hold**: vendor bills for items, but the items haven’t been formally received in HCOM.
  
  **To resolve**: complete receipt in HCOM or contact Financial Operations if items haven’t arrived

- **Price Hold**: vendor bills for items $9.99 over the price of line item (shipping excluded)
  
  **To resolve**: Use the ‘change requisition’ feature to increase the price of the line item or contact Financial Operations

- **Quantity Hold**: vendor bills for additional units of an item exceeding the PO quantity
  
  **To resolve**: Use the ‘change requisition’ feature to increase the quantity or contact Financial Operations if the overbilling is an error.
Changing and cancelling purchase orders

• Only Non-catalog POs (7000…) can be changed/cancelled
• Only the original shopper can change/cancel orders
• Changes allowed are: quantity, amount, need-by date. All changed requisitions increasing the dollar amount will be re-routed through the approval flow.
• Cancellation requests and price decreases do not require approval.
• If the order has already been placed with the vendor, please notify them about the cancellation
• Account code distribution field cannot be changed. In case you used incorrect account coding, please contact your approver.
• Requisitions that contain Marketplace line items cannot be changed using this feature. In order to cancel a Marketplace PO (number beginning with 40000******, please email your Financial Operations contact
Changing/ cancelling a requisition
Payment Request

Accessed by clicking on ‘Payment Request’ tab

Examples of use:

- when you cannot submit a pre-commitment requisition (ex. when the vendor does not accept purchase orders or you're paying for a service/order that has already been completed)

- Payments to individuals (performers, lecturers, awards, fellowships, honorariums, etc.)

- Administrative payments if a standing order cannot be used (royalties, membership, refunds)
Payment Request cont.

- Follow similar process as non-catalog order:
  - Provide adequate description and reference invoice or order
  - Attach an electronic copy of the invoice

- When the requisition is approved and the requestor receives an email notification with the PR number (PR00...) write the PR number on the paper copy of the invoice and send it to Central AP (1033 Mass Ave, 2\textsuperscript{nd} Fl). There is a courier pick up box in the Pierce Hall mailroom.
Standing Orders are used to create a purchase order for recurring goods/services (e.g. sub-contracts, temp services, equipment maintenance services, dry ice e.t.c).

A standing purchase order can accommodate multiple invoices over an extended period of time with the convenience of preapproval and no individual approvals are required for invoices.

Things to remember:

- Standing Order should be created for the current fiscal year or length of project.
- Standing Order should be created using Service Contract or Quote from the supplier as the source.
- Goods or Services Billed by Amount or Services Billed by Quantity item type should be used for Standing Order for Services.
- Invoices should reference the Purchase Order number.
- Invoices should reference the appropriate Purchase Order lines to be charged.
New vendor/ vendor site request

Information required to complete a new vendor request:
- Vendor’s W9 form
- Complete vendor name
- Vendor type
- Tax ID number
- Permanent address
- Remit to address
- Select your Financial Operations contact as your vendor request approver
- Notify your approver via email about a pending vendor request
Submitting a new vendor request
<table>
<thead>
<tr>
<th>Location ID</th>
<th>SEAS Location</th>
<th>Street Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>H03761</td>
<td>58 Oxford St</td>
<td>40 Oxford St (ESL)</td>
</tr>
<tr>
<td>H06225</td>
<td>60 Oxford St</td>
<td>60 Oxford St (Wyss)</td>
</tr>
<tr>
<td>H04131</td>
<td>Conant</td>
<td>12 Oxford St</td>
</tr>
<tr>
<td>H04132</td>
<td>Converst</td>
<td>12 Oxford St</td>
</tr>
<tr>
<td>H03760</td>
<td>Cruft Lab</td>
<td>19 Oxford St</td>
</tr>
<tr>
<td>H04145</td>
<td>Hoffman Lab</td>
<td>20 Oxford St</td>
</tr>
<tr>
<td>H03763</td>
<td>Jefferson Lab</td>
<td>17 Oxford St</td>
</tr>
<tr>
<td>H03763</td>
<td>LISE Bldg</td>
<td>15 Oxford St</td>
</tr>
<tr>
<td>H04133</td>
<td>Mallinckrodt</td>
<td>12 Oxford St</td>
</tr>
<tr>
<td>H03762</td>
<td>Maxwell Dworkin</td>
<td>33 Oxford St</td>
</tr>
<tr>
<td>H86073</td>
<td>McKay Lab</td>
<td>9 Oxford St – All deliveries except Gases and WB Mason</td>
</tr>
<tr>
<td>H03764</td>
<td>Pierce Hall</td>
<td>29 Oxford St</td>
</tr>
<tr>
<td>X04555</td>
<td>Rowland Institute</td>
<td>100 Edwin Land Blvd (02142)</td>
</tr>
<tr>
<td>H04221</td>
<td>Lyman</td>
<td>13 Oxford St</td>
</tr>
<tr>
<td>H04435</td>
<td>7 Divinity</td>
<td></td>
</tr>
<tr>
<td>H05532</td>
<td>Wyss</td>
<td>107 Ave Louis Pasteur</td>
</tr>
<tr>
<td>S00032</td>
<td>Northwest Bldg B1</td>
<td>52 Oxford St</td>
</tr>
<tr>
<td>NR0013</td>
<td>20 University Rd</td>
<td>20 University Rd</td>
</tr>
<tr>
<td>S00045</td>
<td>Karp Research Labs</td>
<td>Children’s Hospital-1 Blackfan Circle</td>
</tr>
<tr>
<td>H86069</td>
<td>LISE</td>
<td>11 Oxford Street</td>
</tr>
<tr>
<td>H86084</td>
<td>WYSS CLSB</td>
<td>3 Blackfan Circle</td>
</tr>
<tr>
<td>H02740</td>
<td>HSPH 665 Huntington Ave. Bldg 1. Room G33</td>
<td></td>
</tr>
<tr>
<td>S00085</td>
<td>100 Bigelow Street</td>
<td></td>
</tr>
<tr>
<td>H86079</td>
<td>NW Labs Receiving Area</td>
<td></td>
</tr>
<tr>
<td>H04151</td>
<td>Harvard Forest</td>
<td></td>
</tr>
</tbody>
</table>
Useful links/ contact information

- **SEAS Financial Operations Team:**
  procurementhelp@seas.harvard.edu
  Donesia Cummings: 617-495-4461; cummings@seas.harvard.edu
  Hera Daldalian: 617-495-4429; hera@seas.harvard.edu
  Noemis Ortiz: 617-496-3625; nortiz@seas.harvard.edu
  Joanna Curry: 617-496-6970; jcurry@seas.harvard.edu

- **SEAS Financial Operations website:**
  www.seas.harvard.edu/financial-operations

- **Strategic Procurement website:**
  www.procurement.harvard.edu

- **Shipping and Receiving :**
  9 Oxford Street (for LISE, McKay, Pierce, Maxwell Dworkin, Cruft buildings)
  Please contact Allison Galipeau: tel: 617-496-4489 email: agalipeau@fas.harvard.edu
  § 52 Oxford Street (for Northwest, ESL 58 Oxford St and 60 Oxford St. buildings)
  Please contact Alfred Trainor: tel: 617-496-5432 email: ajtrain@fas.harvard.edu