



Jaggaer eProcurement System: Process Guides

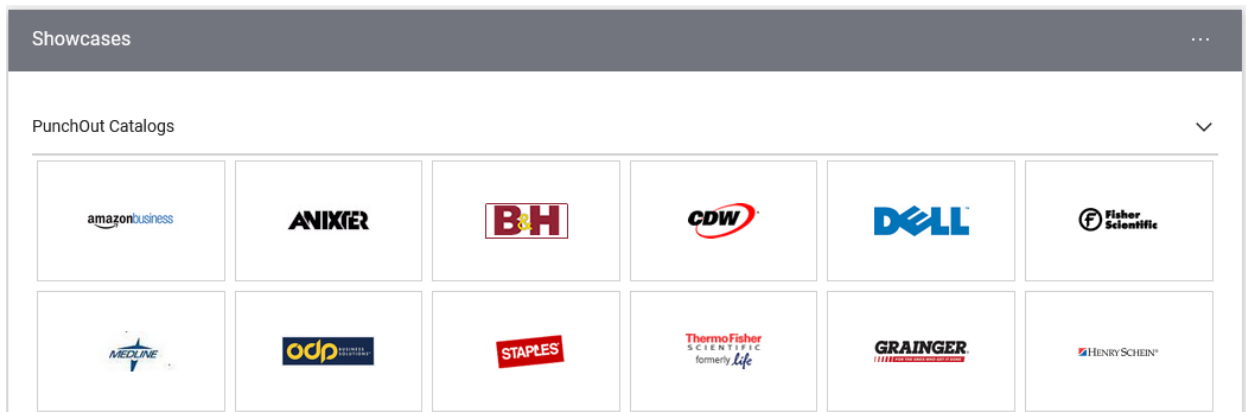
How to place orders (enter requisitions)

Overview: Users with a Requester role have access to place orders (enter requisitions) for Punchout Catalog and non-catalog items. Requesters may place orders for carts assigned to them by other department/division users who do not have access to order/access to cost centers. The Requester role is typically the department/division Administrative Assistant who is responsible for placing orders and assigning the correct cost center.

***Splitting Cost Centers Note:** Requesters may need to split an expense with another department. As the requester does not have access to that cost center, they will need to request temporary access from the cost center approver and the Financial Manager in the Controller's Office, prior to submitting the requisition.*

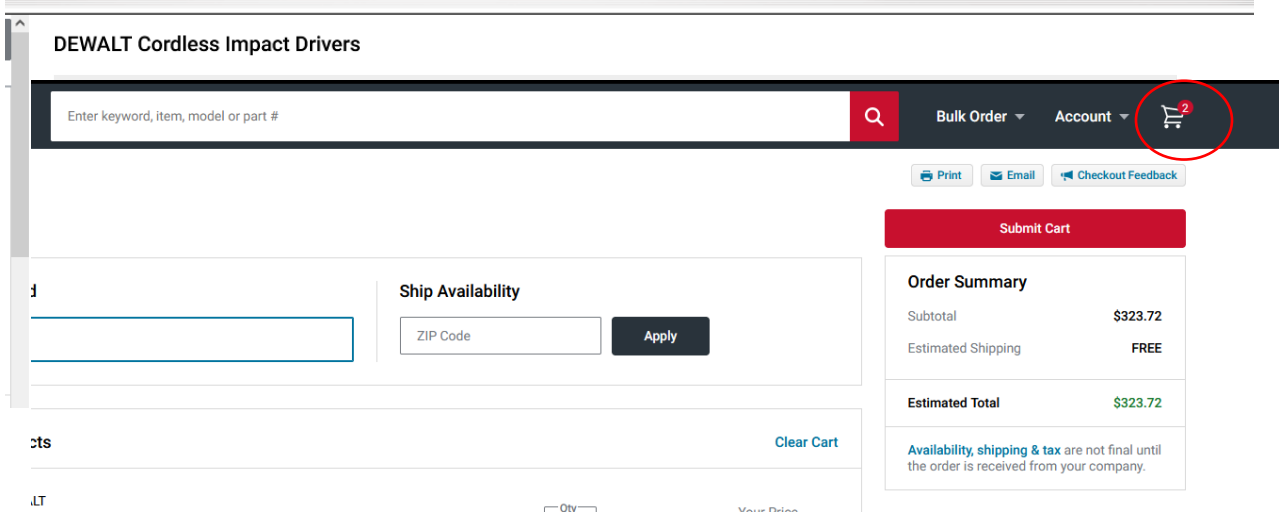
Punchout Catalog Shopping & Ordering- Use this process to add to cart and place orders for items in the Catalogs.

1. Navigate to the Jaggaer site.
2. In the Showcases section, select the Punchout Catalog to shop from.



3. The Punchout Catalog will load in the same window Jaggaer is in.

- Select the items that are needed, and add to the cart.



The screenshot shows a product page for DEWALT Cordless Impact Drivers. At the top, there is a search bar with the placeholder text "Enter keyword, item, model or part #". To the right of the search bar are links for "Bulk Order", "Account", and a shopping cart icon with a red circle around it and a "2" indicating items in the cart. Below the search bar are buttons for "Print", "Email", and "Checkout Feedback". A red "Submit Cart" button is prominently displayed. On the right side, there is an "Order Summary" section showing a Subtotal of \$323.72, Estimated Shipping of FREE, and an Estimated Total of \$323.72. Below the summary, a note states: "Availability, shipping & tax are not final until the order is received from your company." On the left side, there is a "Ship Availability" section with a "ZIP Code" input field and an "Apply" button. A "Clear Cart" button is also visible.

- When done adding items to the cart, access the cart and submit. Each Punchout Catalog site is slightly different, but the cart icon is typically located in the top right-hand corner of the window.
- Clicking Submit Cart will take users back into Jaggaer and to the Shopping Cart screen.
- Requesters can continue to shop other Punchout Catalogs and add items to their cart. Return to the Shopping homepage by clicking on the **Shop** icon in the left-hand side menu. If ready to place the order, click on the **Proceed to Checkout** button.
 - Reminder: Add only Punchout Catalog items to one cart. Create a separate cart for non-catalog items.**
- In the Checkout screen, the following information can be reviewed and updated if needed. Click on the pencil icon to edit.
 - Shipping – Ship To address can be updated to the appropriate campus location
 - Accounting Codes – Cost center and Object code can be edited at the entire cart level, or on each line item.
 - Internal Notes and Attachments – Add an internal note and any attachments, if needed. Internal Notes will appear in the approval email sent to the next level approvers.



The screenshot shows a shopping cart interface. At the top, there is a navigation bar with "Home", "Shop", "Orders", "Contracts", "Accounts Payable", and "Reporting". The main header shows "TEST" and "323.72 USD". The cart title is "Shopping Cart • 3650002". Below the title, there are tabs for "Simple" and "Advanced". A search bar is present with the placeholder text "Search for products, suppliers, forms, part number, etc.". The cart contains "2 Items" from "WW Grainger Inc" for a total of "323.72 USD". On the right side, there is a "Details" section with a dropdown arrow. The details include "For Roger Requester" and "Name 2022-11-11 Requester 02". At the bottom right, there are buttons for "Assign Cart" and "Proceed To Checkout".



d. External Notes and Attachments – Add an external note and any attachments

General	Shipping	Billing
Cart Name: 2022-11-10 Requester 01	Ship To Attn: Roger Requester Bldg/Rm: Admin Building/Rm 505 Mailstop: 1 500 8th Ave. Lewiston, ID 83501 United States	Bill To Lewis-Clark State College Controller's Office 500 8th Avenue Lewiston, ID 83501 United States
Description: <i>no value</i>		
Prepared by: Roger Requester		
Prepared for: Roger Requester		
Ad-Hoc Approver: Select		
Buyer Code: 0ad433c0-e2de-4a72-ae2a-43ef12b314aa WEB BUYER	Delivery Options Ship Via: Best Carrier-Best Way	Billing Options Accounting Date: <i>no value</i>
Bank Code: VDM 97a04a13-a1e2-4410-9753-0c5117f4b8dc		

Accounting Codes	
Cost Center	Object Code
010601 010601	55000 O.E. Budget Umbrella

Internal Notes and Attachments	External Notes and Attachments
Internal Note: <i>no value</i>	Note to all Suppliers: <i>no value</i>
Internal Attachments: Add	Attachments for all suppliers: Add

e. Clicking on the **three dots** next to a line item will open a menu, where the **Accounting Codes** option can be selected. This action allows the cost center and object code to be adjusted for that specific line item.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Test Item	1234	EA	27.00	12 EA	324.00	⋮ □

ITEM DETAILS	
Contract: <i>no value</i>	Internal Note: <i>no value</i>
Commodity Code: <i>no value</i>	Internal Attachments: Add
	External Note: <i>no value</i>
	Attachments for supplier: Add

- Override
- Ship To
- Delivery Options
- Bill To
- Accounting Codes**
- Remove



- Once the order has been reviewed and any updates made, the Requester clicks on the **Place Order** button. The **What's next for my order** side bar displays the next steps and approvers for the requisition.

The screenshot shows the Jagger requisition interface. At the top right, there is a navigation bar with a search field, a cart icon showing 474.00 USD, and a **Place Order** button circled in red. Below this, the main content area is divided into several sections. On the left, there are sections for 'Billing' and 'Billing Options'. The 'Billing' section includes 'Bill To' information for Lewis-Clark State College. The 'Billing Options' section shows 'Accounting Date' as 'no value'. In the center, there is a section for 'Object Code' with the value '55000' and 'O.E. Budget Umbrella'. On the right, there is a 'Draft' summary section showing a 'Total (474.00 USD)' and a 'Subtotal' of 474.00. Below this is a 'What's next for my order?' sidebar, also circled in red, which shows the 'Next Step' as 'Level 1 Approval' and the 'Approver' as 'Approver, Jess Waddington'. The sidebar also includes a 'Workflow' section with a 'Draft' status (Active, Roger Requester) and a 'Level 1 Approval' status (Future).

- Once the order has been placed, the following message screen will display. Users can quickly navigate back to the requisition by clicking on the **Requisition number** link, or to other areas of Jagger using the link under **Options**.

The screenshot shows a message screen titled 'Requisition 3649560 Submitted'. The screen is divided into two main sections: 'Summary' and 'Options'. The 'Summary' section contains the following information:

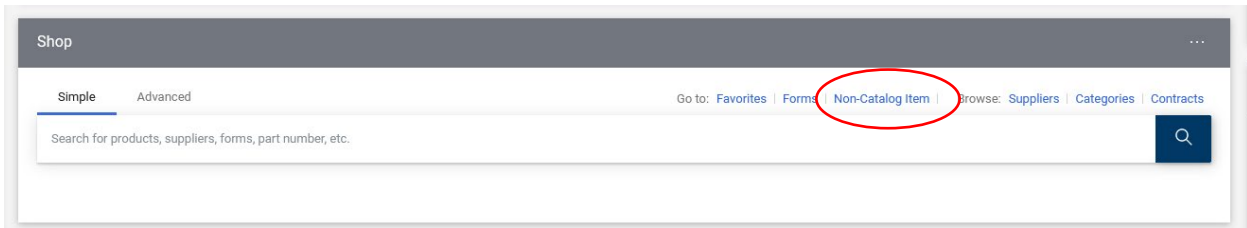
Field	Value
Requisition number	3649560
Requisition status	Pending
Cart name	2022-11-10 Requester 01
Requisition date	11/10/2022
Requisition total	474.00 USD
Number of line items	2

The 'Options' section contains the following links:

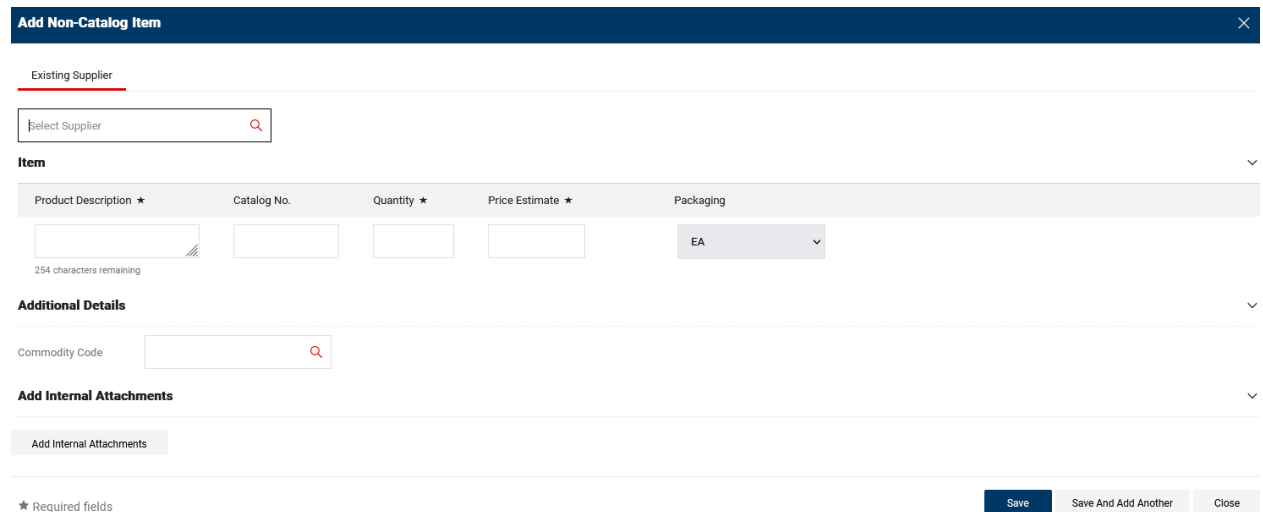
- Print
- Recent orders
- Return to your home page

Non-Catalog Shopping & Ordering – Use this process to add to cart and place orders for items that are not available in the Punchout Catalogs

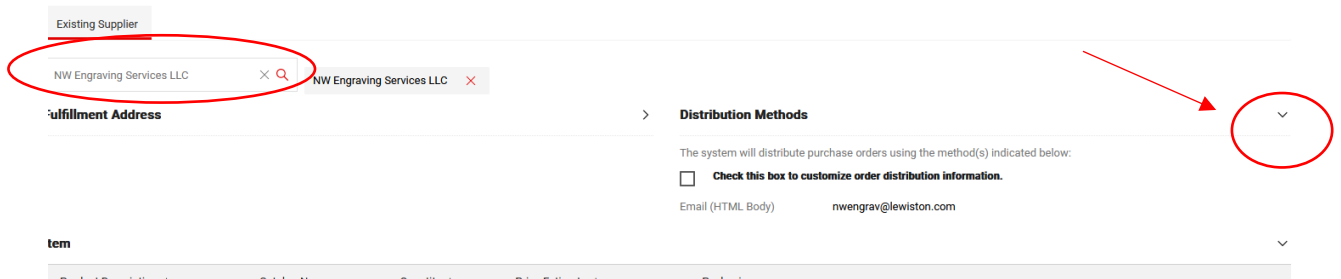
1. Navigate to the Jaggaer site.
2. To place an order for a Non-Catalog Item, click on the **Non-Catalog Item** link in the **Shop** section.



3. The Non-Catalog Item window will open.



4. Enter the supplier's name into the **Existing Supplier** field to search. Select the supplier. Click the arrow next to **the Distribution Methods** to ensure the supplier has an email address. This step is key as Jaggaer will automatically email the PO to the supplier.





- a. If the supplier does not have an email in their record, and you know the email address, click on the checkbox next to **“Check this box to customize order distribution information”** and enter the email.
 - b. If the supplier does not have an email in their record, and you do not know the email address, leave the email field blank, and the Purchasing Department will research and update the supplier record.
5. Enter the order information in the **Product Description**, **Catalog No** (part number, item number – if available, not required), **Quantity**, **Price Estimate** and **Packaging** fields. A quote or other relevant documentations can be attached by clicking on the **Add Internal Attachments** button. If there is more than one line item, click the **Save and Add Another** button to add another line.

Item

Product Description *	Catalog No.	Quantity *	Price Estimate *	Packaging
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA

254 characters remaining

Additional Details

Commodity Code

Add Internal Attachments

Add Internal Attachments

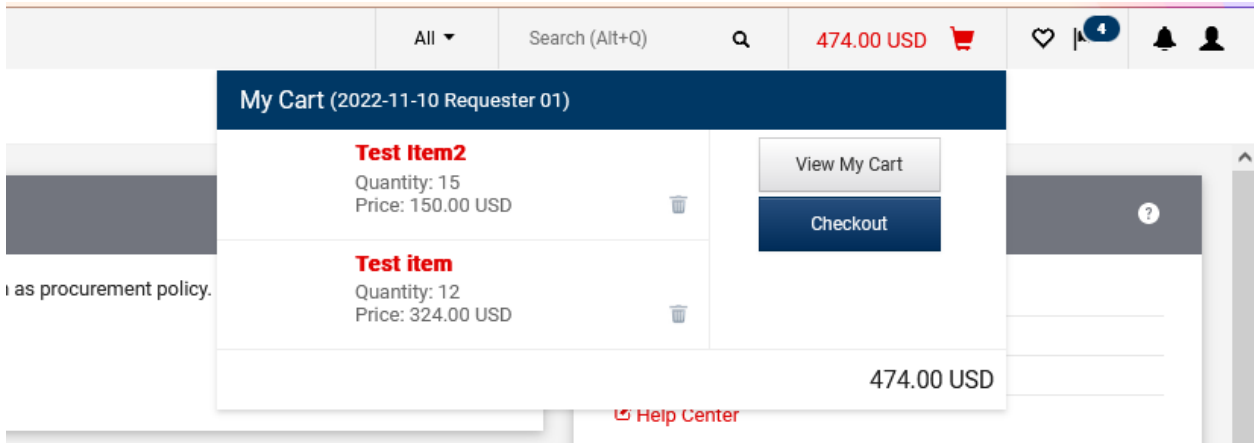
★ Required fields

Save Save And Add Another Close

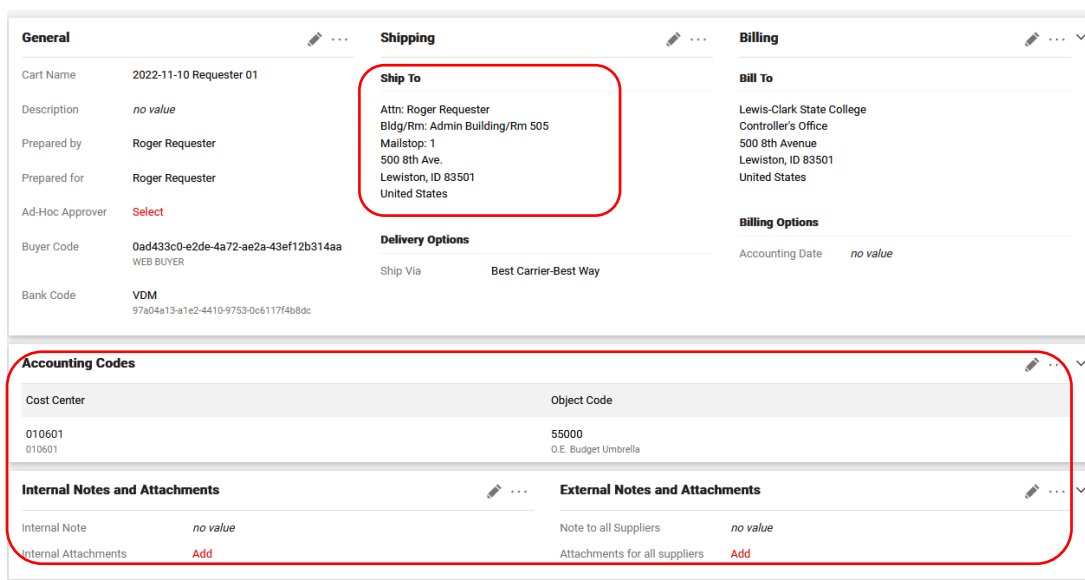
6. When all line items have been entered, click Save. The Non-Catalog order is added to the Cart.
7. Requesters can continue to add Non-Catalog items to the cart. Click on the Non-Catalog Item link to continue adding items.
- a. **Reminder: Add only Non-Catalog items to one cart. Create a separate cart for Punchout Catalog items.**



8. Click on the Cart icon in the top, right hand corner of the window. Select the **View My Cart** button to view the cart, or **Checkout** button to go directly to reviewing and placing the order.



9. In the Checkout screen, the following information can be reviewed and updated if needed. Click on the pencil icon to edit.
 - a. Shipping – Ship To address can be updated to the appropriate campus location
 - b. Accounting Codes – Cost center and Object code can be edited at the entire cart level, or on each line item.
 - c. Internal Notes and Attachments – Add an internal note and any attachments, if needed. Internal Notes will appear in the approval email sent to the next level approvers.
 - d. External Notes and Attachments – Add an external note and any attachments



2 Lines

NW Engraving Services LLC - 27 Items - 474.00 USD

^ SUPPLIER DETAILS 302 C Thain Rd : 302 C Thain Rd, Lewiston, Idah...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Test Item	1234	EA	27.00	12 EA	324.00

ITEM DETAILS

Contract:	no value	Internal Note:	no value
Commodity Code:	no value	Internal Attachments:	Add
		External Note:	no value
		Attachments for supplier:	Add

Menu options: Override, Ship To, Delivery Options, Bill To, Accounting Codes, Remove

e. Clicking on the **three dots** next to a line item will open a menu, where the **Accounting Codes** option can be selected. This action allows the cost center and object code to be adjusted for that specific line item.

10. Once the order has been reviewed and any updates made, the Requester clicks on the **Place Order** button. The **What's next for my order** side bar displays the next steps and approvers for the requisition.

All Search (Alt+Q) 474.00 USD Assign Cart **Place Order**

ing

Requester
 Requester Name: Admin Building/Rm 505
 Requester Address: 500 8th Avenue, Lewiston, ID 83501, United States

Billing

Bill To
 Lewis-Clark State College
 Controller's Office
 500 8th Avenue
 Lewiston, ID 83501
 United States

Billing Options
 Accounting Date: no value

Shipping Options
 Shipping Method: Best Carrier-Best Way

Object Code
 55000
 O.E. Budget Umbrella

Draft

Total (474.00 USD)

Subtotal	474.00
Total	474.00

What's next for my order?

Next Step: Level 1 Approval
 Approver: Approver, Jess Waddington

Workflow

- Draft** (Active) - Roger Requester
- Level 1 Approval** (Future)



11. Once the order has been placed, the following message screen will display. Users can quickly navigate back to the requisition by clicking on the **Requisition number** link, or to other areas of Jaggaer using the link under **Options**.

✔ Requisition 3649560 Submitted

Summary		Options	
Requisition number	3649560	Print	
Requisition status	Pending	Recent orders	
Cart name	2022-11-10 Requester 01	Return to your home page	
Requisition date	11/10/2022		
Requisition total	474.00 USD		
Number of line items	2		