



## Jaggaer eProcurement System: Process Guides

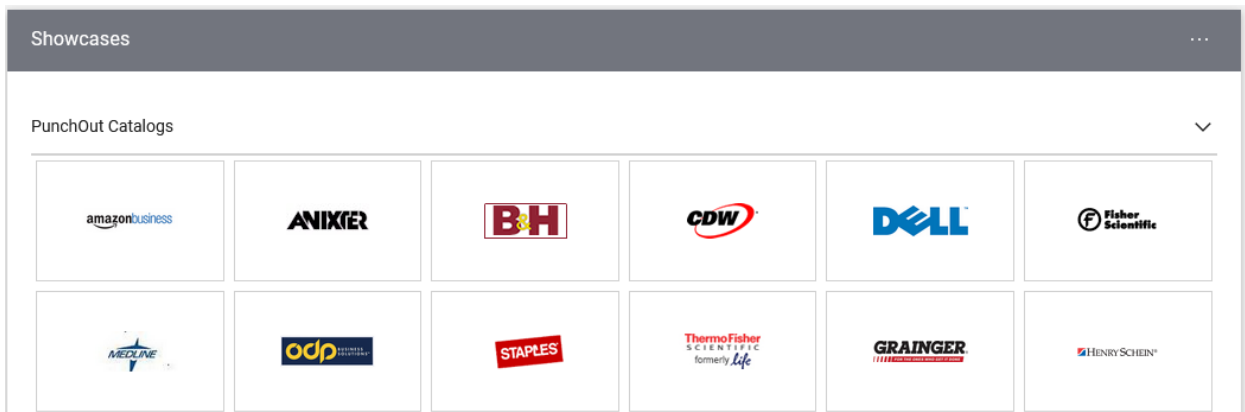
### How to place orders (enter requisitions)

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.*

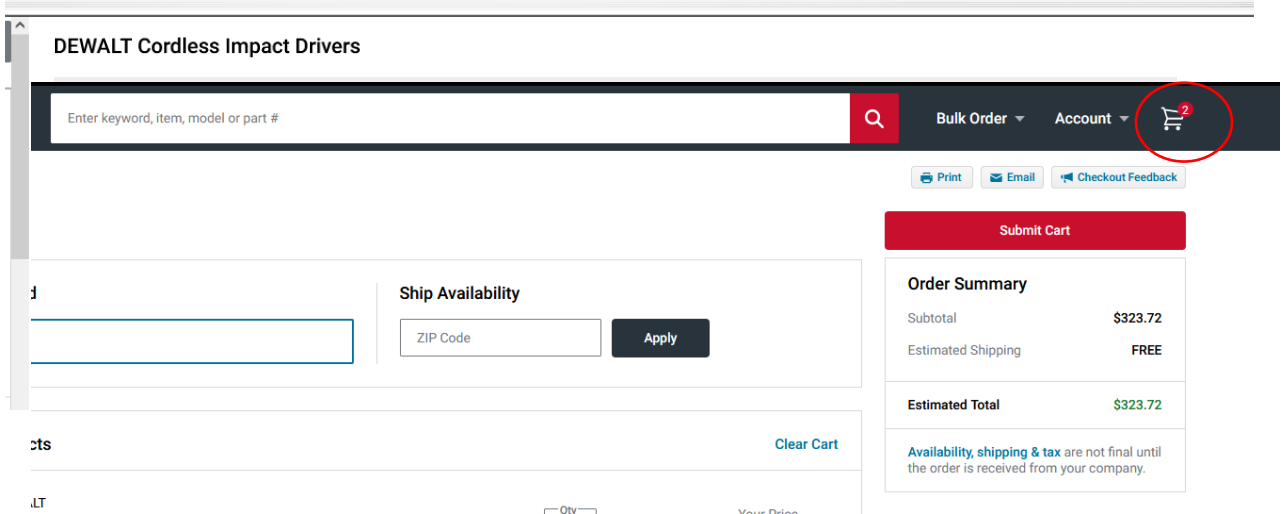
**Punchout Catalog Shopping & Ordering- Use this process to add to cart and place orders for items in the Catalogs.**

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.



- 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.





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

The screenshot shows a procurement form with several tabs: General, Shipping, and Billing. The 'Shipping' tab is active, and a red box highlights the 'Ship To' section, which contains the following information: Attn: Roger Requester, Bldg/Rm: Admin Building/Rm 505, Mailstop: 1, 500 8th Ave., Lewiston, ID 83501, United States. Below this, the 'Delivery Options' section shows 'Ship Via' set to 'Best Carrier-Best Way'. Another red box highlights the 'Accounting Codes' section, which includes a table with 'Cost Center' and 'Object Code' columns. The 'Cost Center' is 010601 and the 'Object Code' is 55000. Below the table are sections for 'Internal Notes and Attachments' and 'External Notes and Attachments', both with 'Add' buttons.

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.

The screenshot shows a line item menu for '2 Lines' under 'NW Engraving Services LLC'. The menu is open for a 'Test Item' with a unit price of 27.00 and a quantity of 12 EA. A red box highlights the 'three dots' icon next to the 'Ext. Price' column. A red arrow points from this icon to the 'Accounting Codes' option in the menu. The menu also includes options for 'Override', 'Ship To', 'Delivery Options', 'Bill To', and 'Remove'.



- 9. 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.

Billing	
<b>Requester</b>	Lewis-Clark State College
<b>Address</b>	Controller's Office 500 8th Avenue Lewiston, ID 83501 United States
<b>Billing Options</b>	Accounting Date <i>no value</i>

Shipping Options	
Selected	Best Carrier-Best Way

Summary	
Object Code	55000
	O.E. Budget Umbrella

Draft	
Total (474.00 USD)	
Subtotal	474.00
	<b>474.00</b>

**What's next for my order?**  
Next Step: Level 1 Approval  
Approver: Approver, Jess Waddington  
Workflow: Draft (Active, Roger Requester), Level 1 Approval (Future)

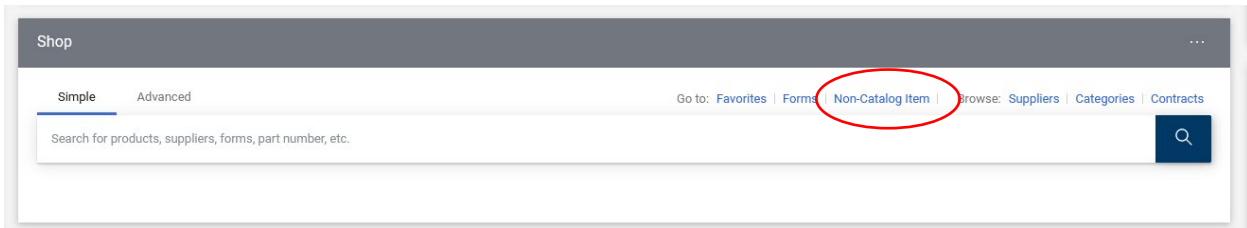
- 10. Once the order has been placed, the following message screen will display. Users can quickly navigate back to the requisition by clicking on the **Requisition number** link, or to other areas of Jaggaer using the link under **Options**.

Summary	
Requisition number	<a href="#">3649560</a>
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

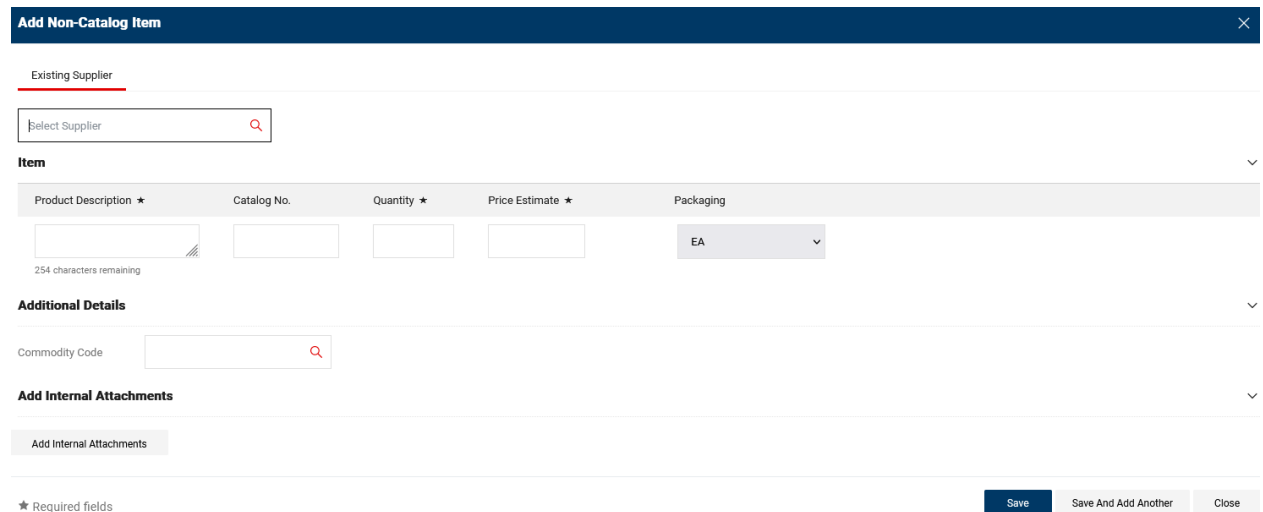
Options	
<a href="#">Print</a>	
<a href="#">Recent orders</a>	
<a href="#">Return to your home page</a>	

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

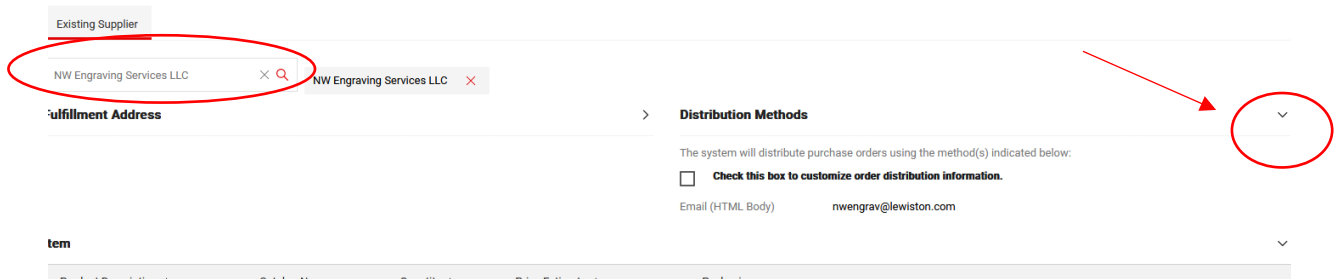
1. Navigate to the Jaggaer site.
2. To place an order for a Non-Catalog Item, click on the **Non-Catalog Item** link in the **Shop** section.



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.





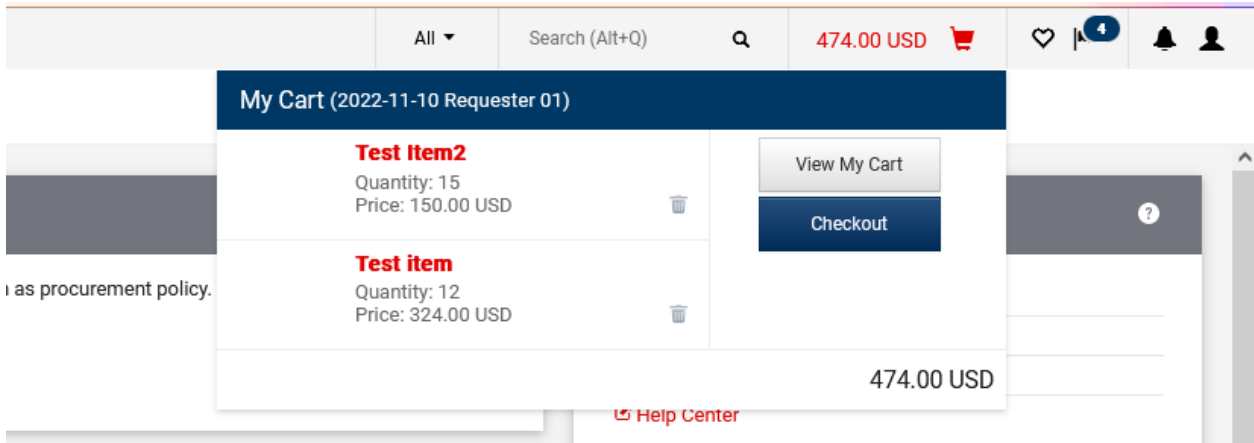
- a. If the supplier does not have an email in their record, and you know the email address, click on the checkbox next to **“Check this box to customize order distribution information”** and enter the email.
  - b. If the supplier does not have an email in their record, and you do not know the email 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.

A screenshot of a web-based order entry form. The form is divided into several sections. The top section, titled "Item", contains five input fields: "Product Description" (with a 254 character limit), "Catalog No.", "Quantity", "Price Estimate", and "Packaging" (a dropdown menu with "EA" selected). A red box highlights these five fields. Below this is the "Additional Details" section, which includes a "Commodity Code" search field. The "Add Internal Attachments" section contains a button labeled "Add Internal Attachments", which is circled in red. At the bottom right, there are three buttons: "Save", "Save And Add Another", and "Close", all enclosed in a red box. A legend at the bottom left indicates that an asterisk (\*) denotes required fields.

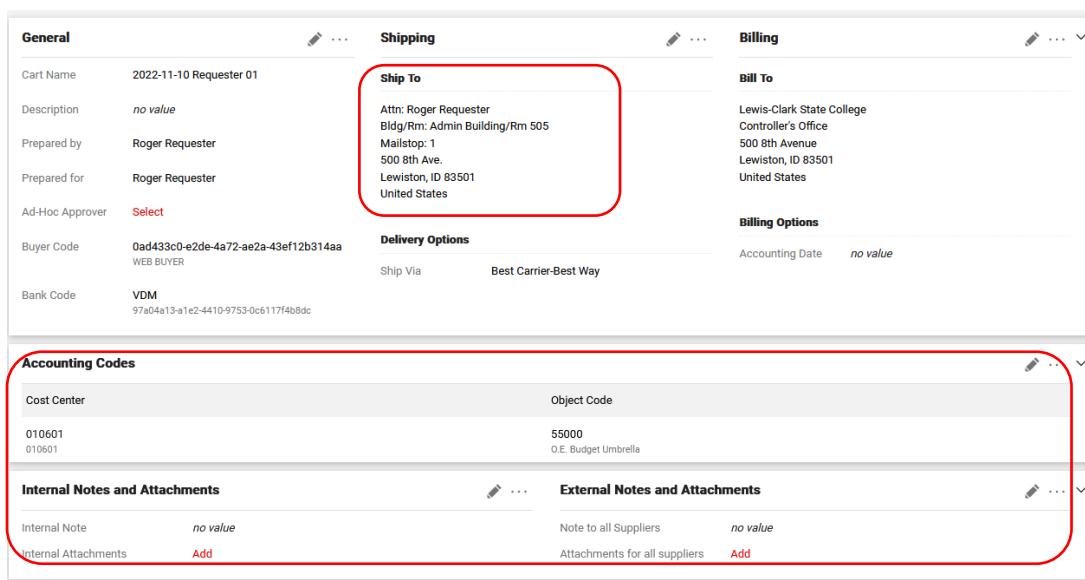
6. When all line items have been entered, click Save. The Non-Catalog order is added to the Cart.
7. Requesters can continue to add Non-Catalog items to the cart. Click on the Non-Catalog Item link to continue adding items.
  - a. **Reminder: Add only Non-Catalog items to one cart. Create a separate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

**Bill To**

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

**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**

Best Carrier-Best Way

**Object Code**

55000  
O.E. Budget Umbrella

**Draft**

**Total (474.00 USD)**

Subtotal 474.00  
**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	<a href="#">3649560</a>	<a href="#">Print</a>	
Requisition status	Pending	<a href="#">Recent orders</a>	
Cart name	2022-11-10 Requester 01	<a href="#">Return to your home page</a>	
Requisition date	11/10/2022		
Requisition total	474.00 USD		
Number of line items	2		