

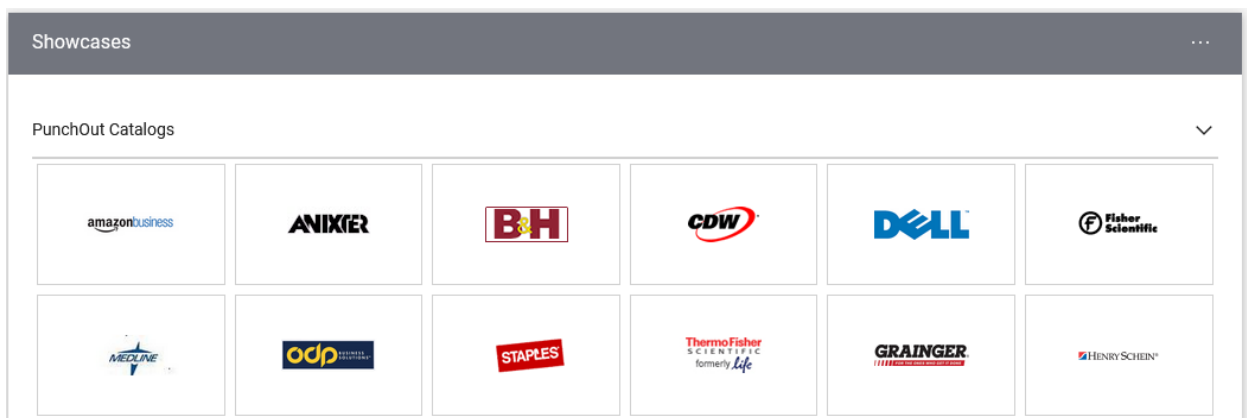
Jaggaer eProcurement System: Process Guides

How to shop

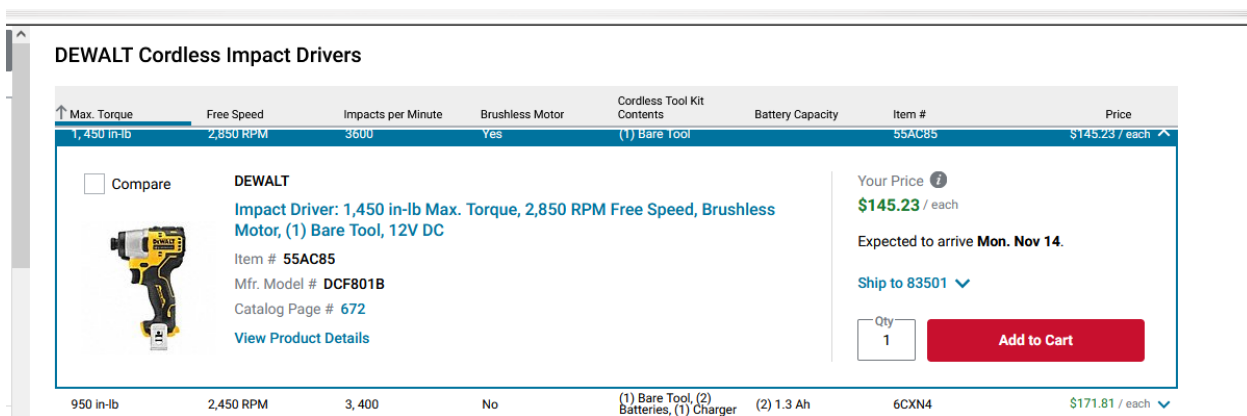
Overview: Users with a Shopper role have access to shop for Punchout Catalog items and non-Catalog items, and to create carts. Shoppers can assign their carts to a designated Requester in their area. The Requester role is typically the department/division Administrative Assistant who is responsible for placing orders and assigning the correct cost center.

Punchout Catalog Shopping

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

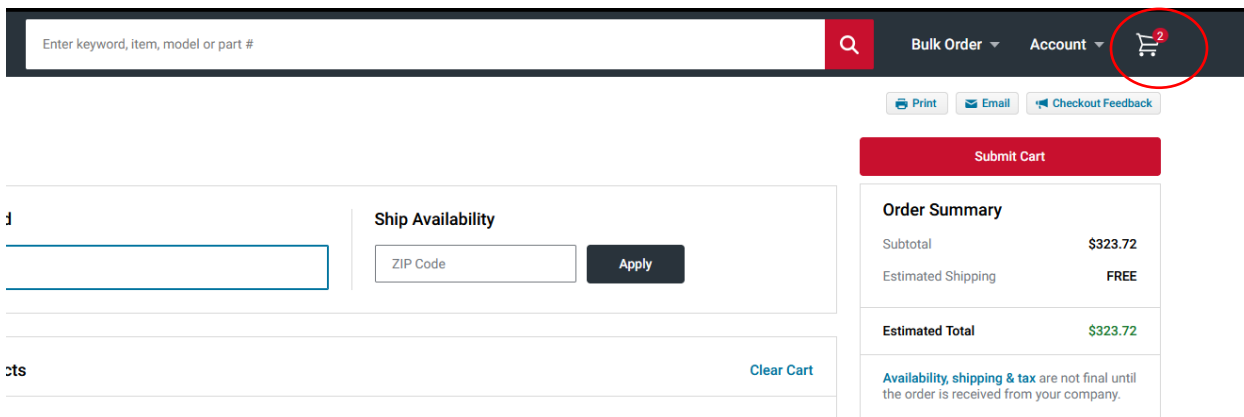


3. The Punchout Catalog will load in the same window Jaggaer is in.
4. Select the items that are needed, and add to the cart.





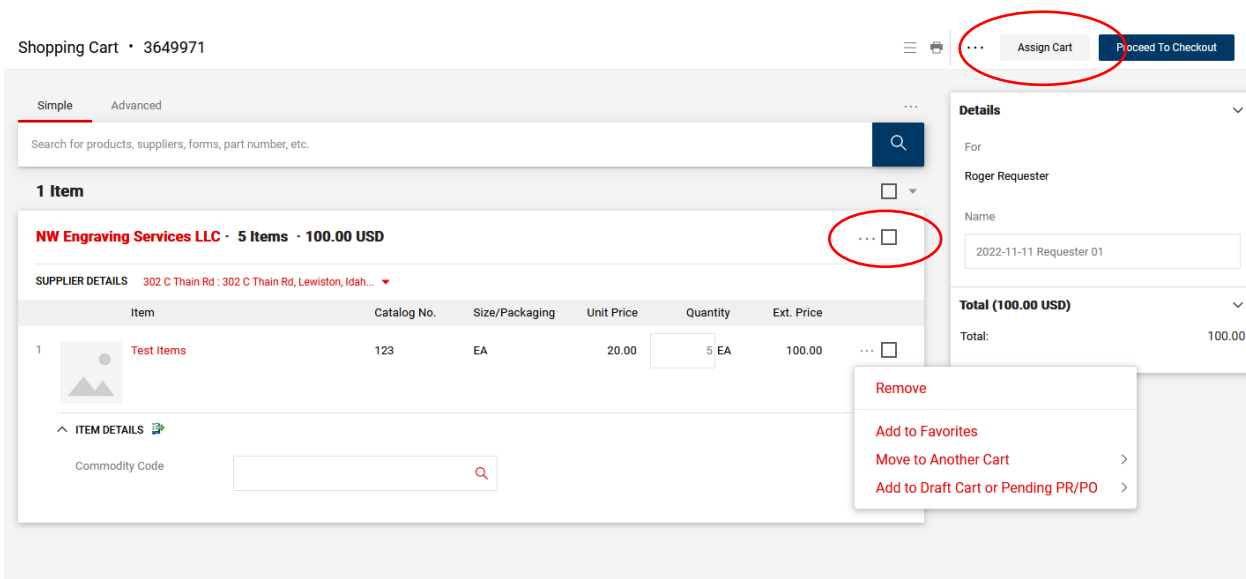
- When done adding items to the cart, access the cart and submit. Each Punchout Catalog site is slightly different, but the **cart** icon is typically located in the top right-hand corner of the window.



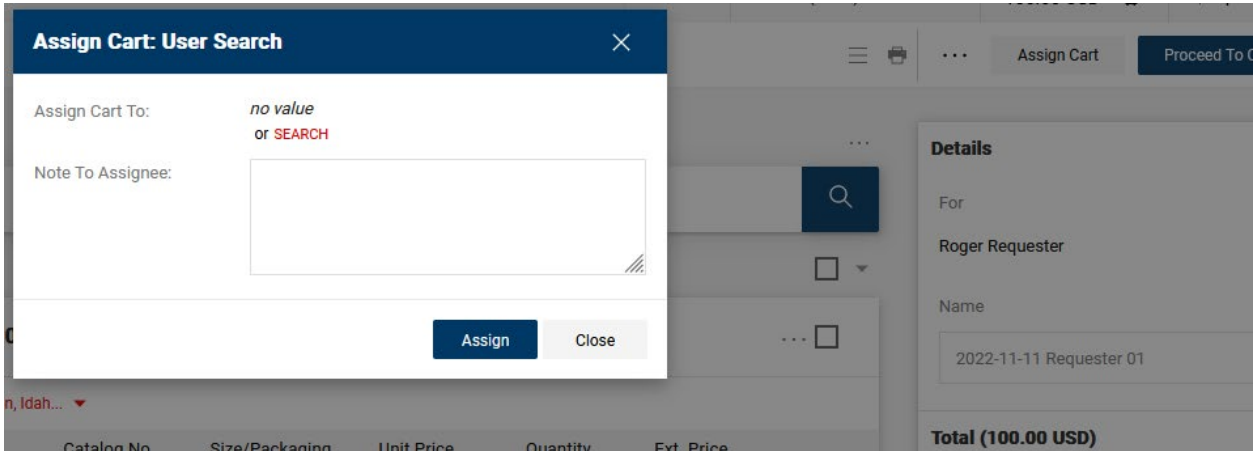
- Clicking Submit Cart will take users back to Jaggaer and to the Shopping Cart screen.
- Shoppers can continue to shop other Punchout Catalogs and add items to their cart. Return to the Shopping homepage by clicking on the **Shop** icon in the left-hand side menu.



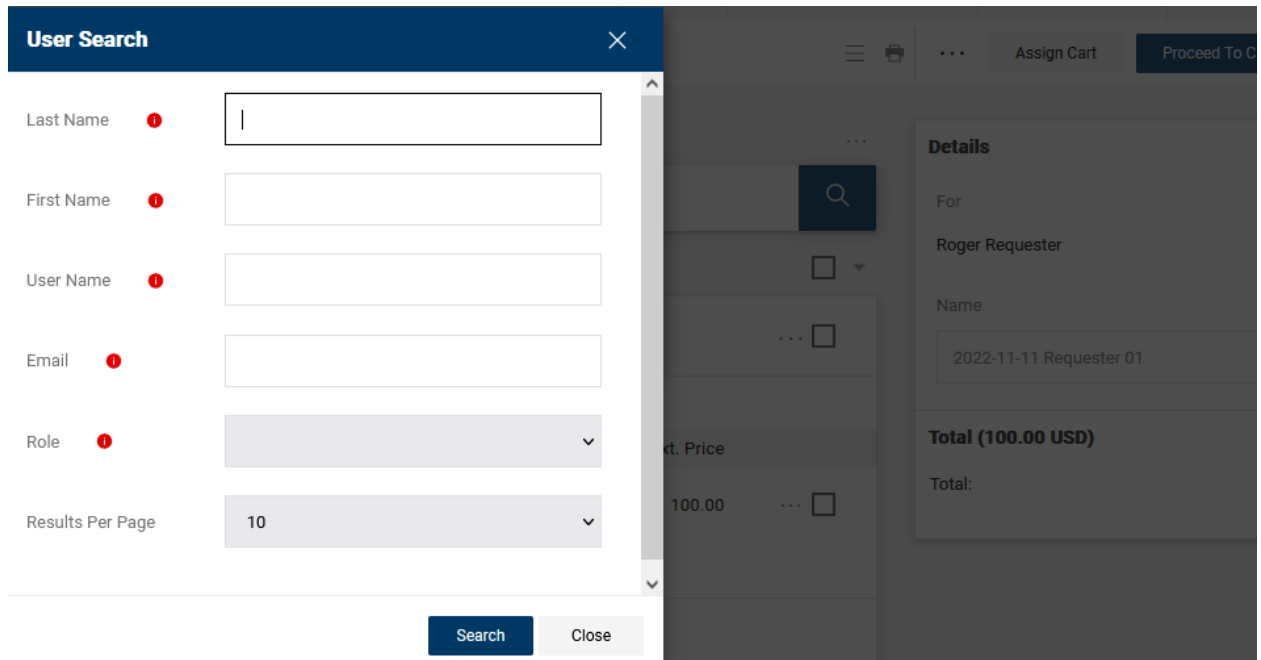
- Shoppers can review the items in their cart, and remove any items if needed.
 - Click on the **three dots** next to the line item to open the menu. Select **Remove** to remove any items that are not needed.
- If done with shopping, select **Assign** cart to assign the cart to the department/division user who will place the order.



10. Select the **Search** link in the Assign Cart window



11. Enter the name of the user and click search.

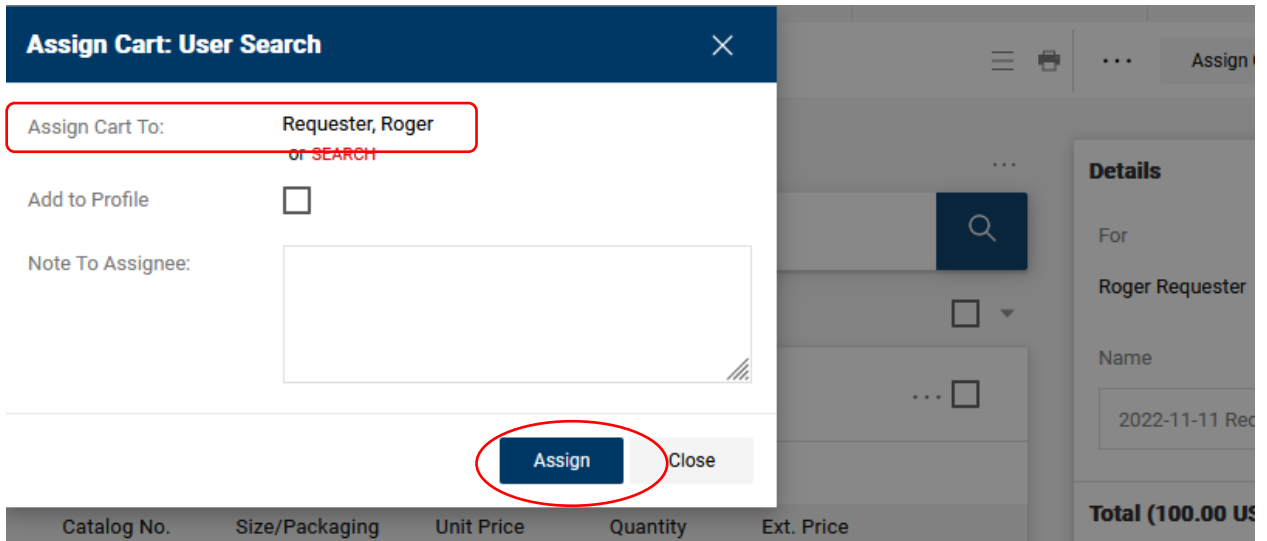


12. Click the plus icon to select the correct user.

User Name	Email	Phone	Action
Requester	jcevetello@hcg.com		+

Close

13. The selected user now displays in the **Assign Cart To** section. Click the **Assign** button to complete the action.



Assign Cart: User Search

Assign Cart To: Requester, Roger
or SEARCH

Add to Profile

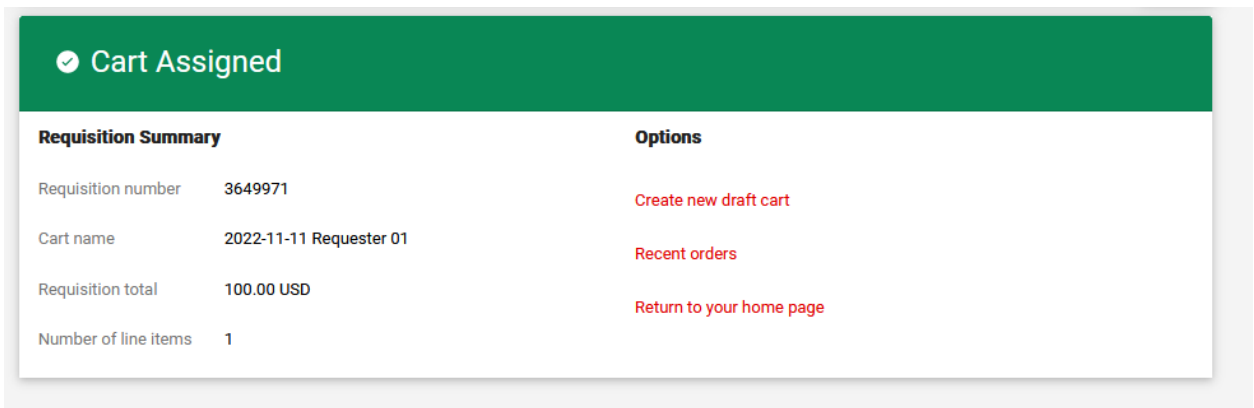
Note To Assignee:

Assign Close

Catalog No. Size/Packaging Unit Price Quantity Ext. Price

Total (100.00 US

14. Once the cart has been assigned, the following message screen will display. Shoppers can quickly navigate back to their home page to continue shopping or create a new draft

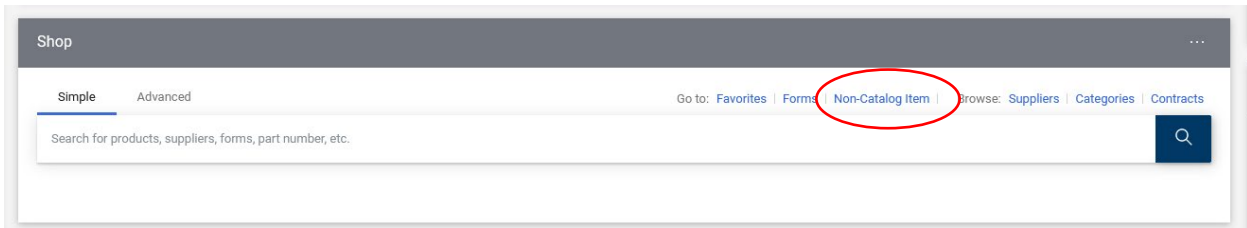


Cart Assigned

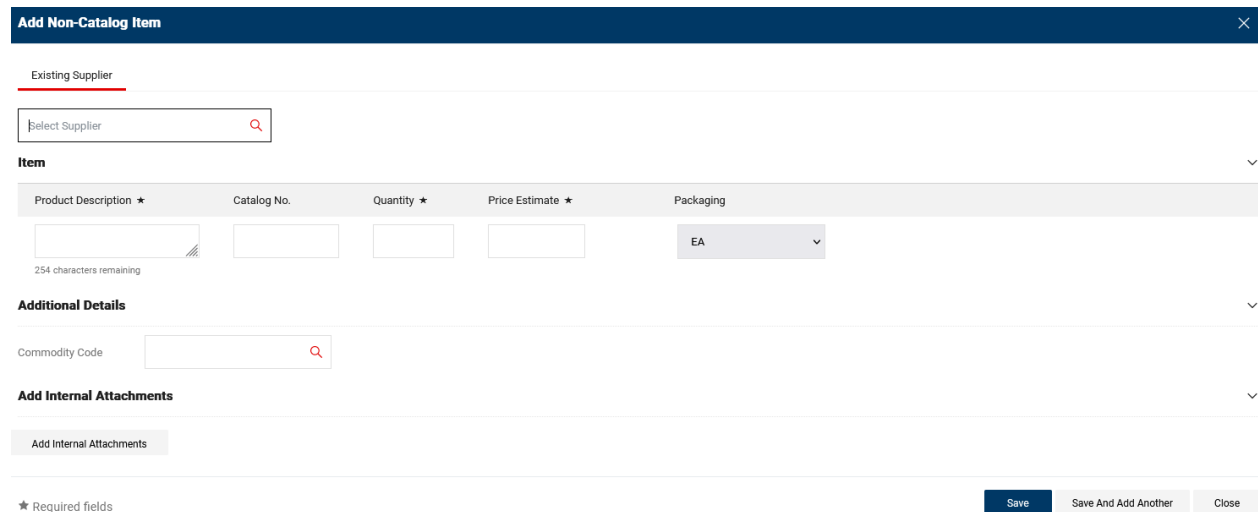
Requisition Summary		Options
Requisition number	3649971	Create new draft cart
Cart name	2022-11-11 Requester 01	Recent orders
Requisition total	100.00 USD	Return to your home page
Number of line items	1	

Non-Catalog Shopping – Use this process to add items to the cart that are not available in the Punchout Catalogs.

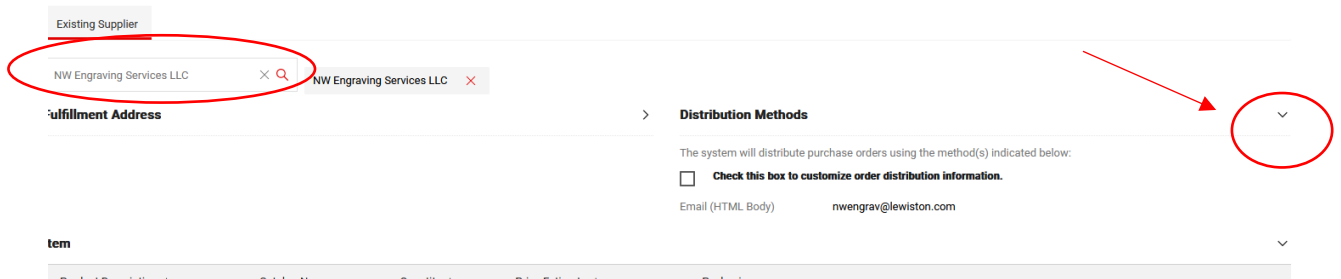
16. Navigate to the Jaggaer site.
17. To shop for a Non-Catalog Item, click on the **Non-Catalog Item** link in the **Shop** section.



18. The Non-Catalog Item window will open.



19. 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.





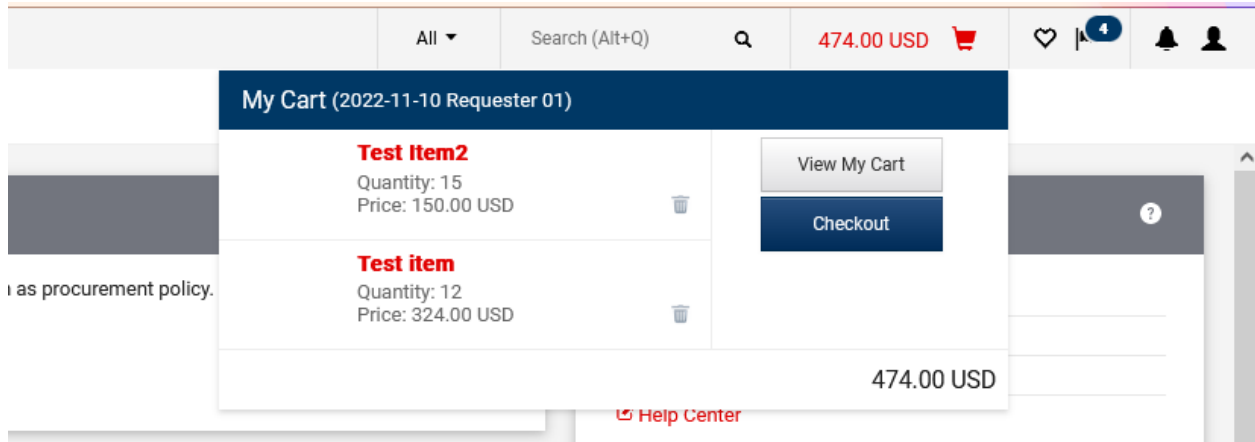
- a. If the supplier does not have an email in their record, and you know the email address, click on the checkbox next to **“Check this box to customize order distribution information”** and enter the email.
- b. If the supplier does not have an email in their record, and you do not know the email address,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

20. 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: 1. "Item" section: Contains five input fields labeled "Product Description ★", "Catalog No.", "Quantity ★", "Price Estimate ★", and "Packaging". The "Packaging" field is a dropdown menu currently showing "EA". A red box highlights these five fields. 2. "Additional Details" section: Contains a "Commodity Code" input field with a search icon. 3. "Add Internal Attachments" section: Contains a button labeled "Add Internal Attachments" which is circled in red. 4. Bottom right: Contains three buttons: "Save", "Save And Add Another", and "Close", all enclosed in a red box. 5. A legend at the bottom left indicates "★ Required fields".

21. When all line items have been entered, click Save. The Non-Catalog order is added to the Cart.

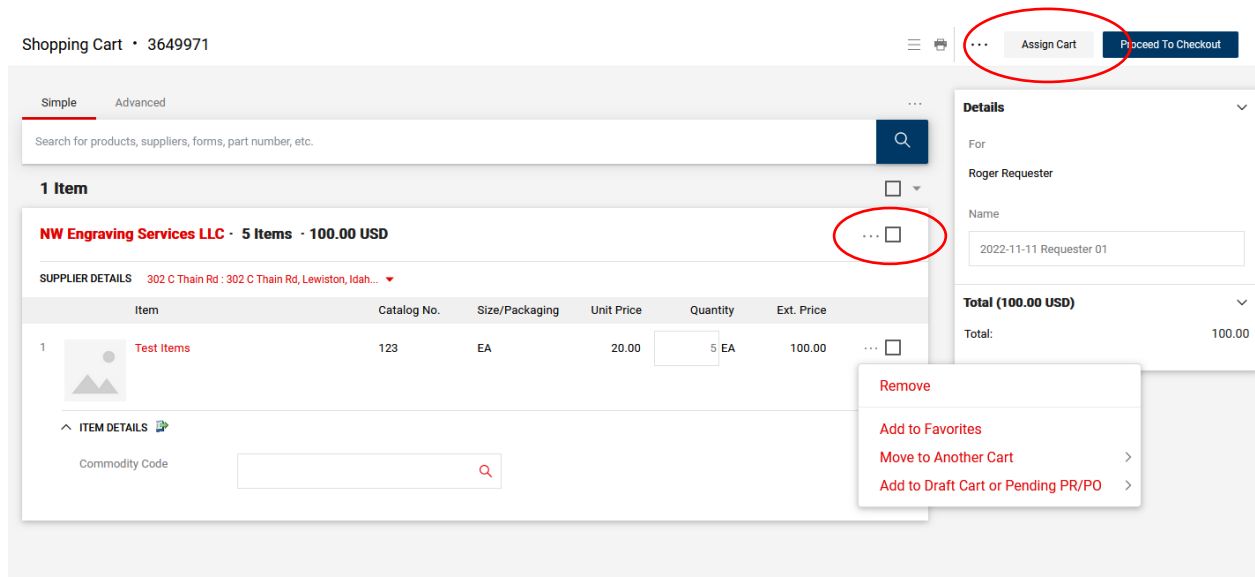
22. Click on the Cart icon in the top, right hand corner of the window. Select the **View My Cart** .



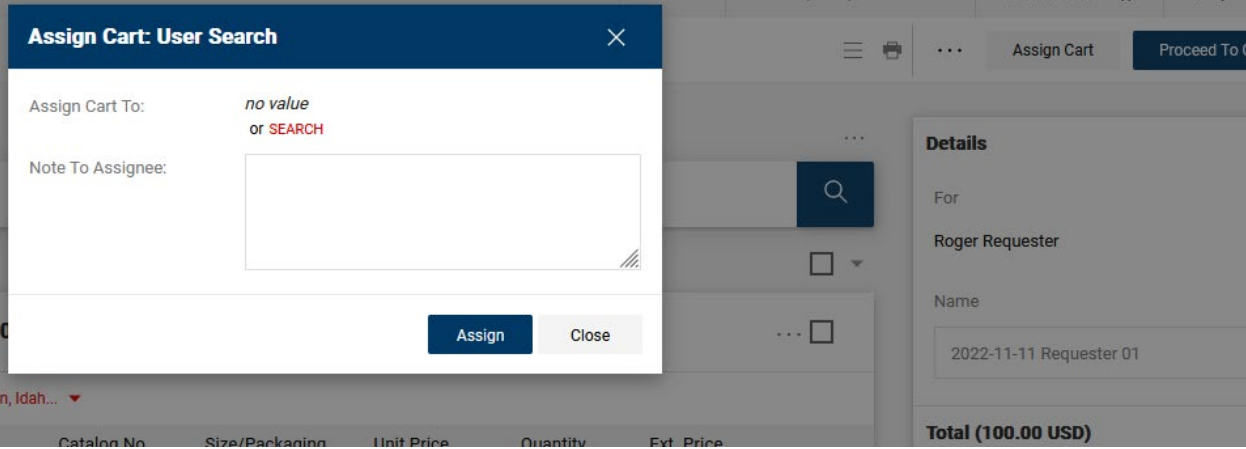
23. Shoppers can review the items in their cart, and remove any items if needed.

- b. Click on the **three dots** next to the line item to open the menu. Select **Remove** to remove any items that are not needed.

24. Select Assign cart to assign the cart to the department/division user who will place the order.



25. Select the **Search** link in the Assign Cart window



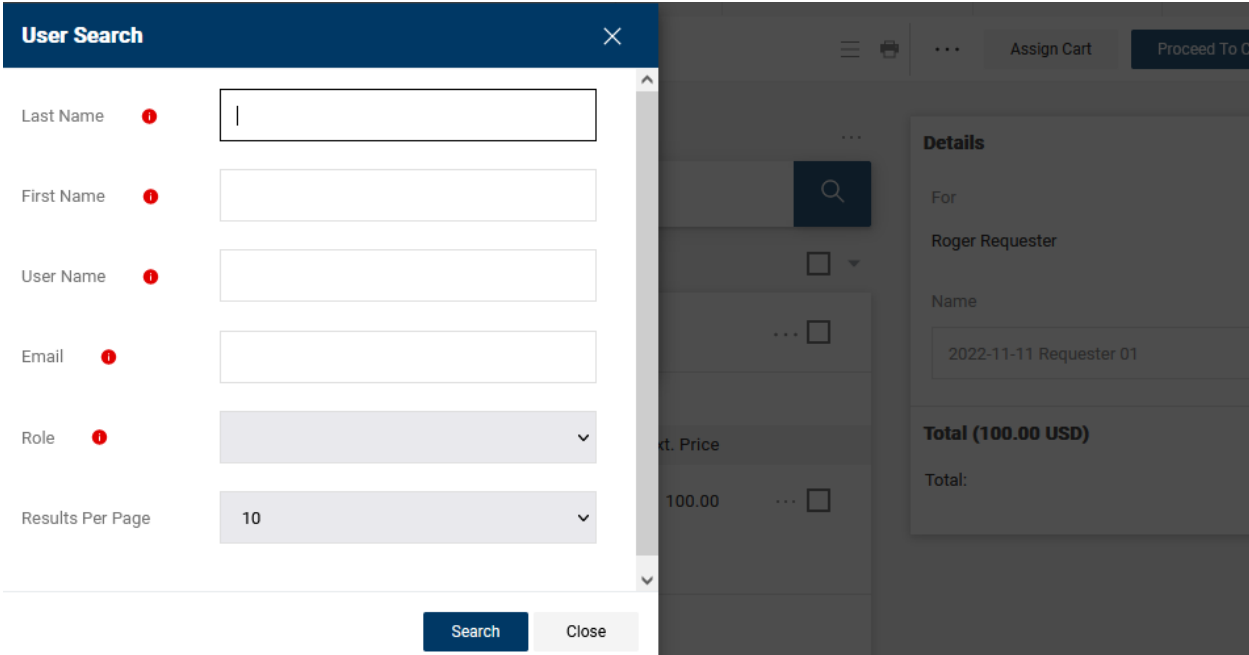
Assign Cart: User Search

Assign Cart To: *no value*
or **SEARCH**

Note To Assignee:

Assign **Close**

26. Enter the name of the user and click search.



User Search

Last Name **i**

First Name **i**

User Name **i**

Email **i**

Role **i**

Results Per Page

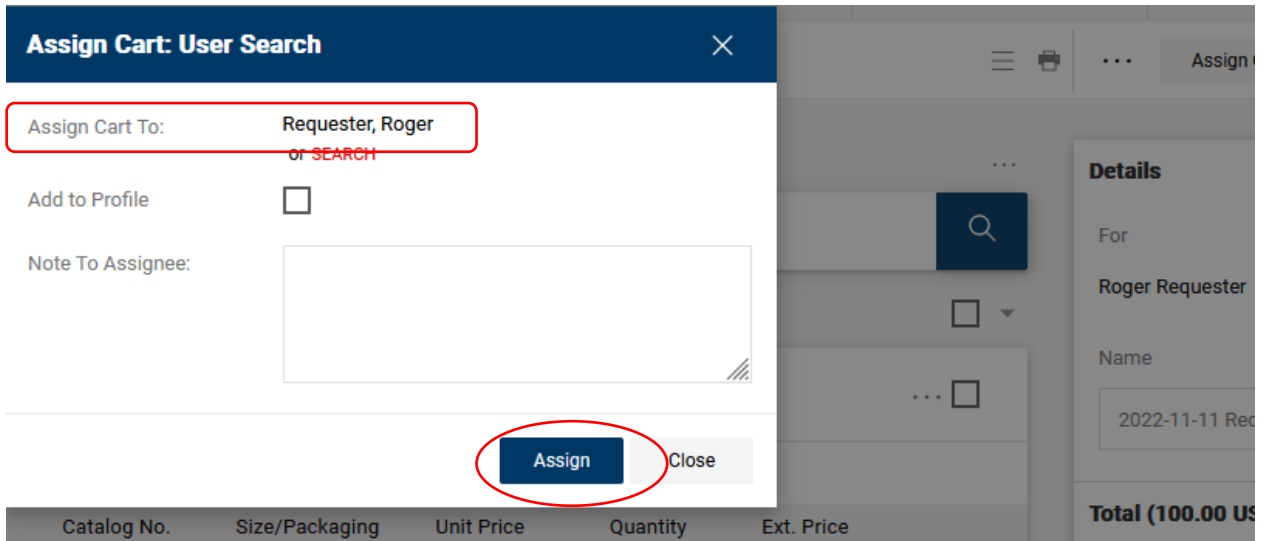
Search **Close**

27. Click the plus icon to select the correct user.

User Name	Email	Phone	Action
Requester	jcevetello@hcg.com		+

Close

28. The selected user now displays in the **Assign Cart To** section. Click the **Assign** button to complete the action.



Assign Cart: User Search

Assign Cart To: Requester, Roger
or SEARCH

Add to Profile

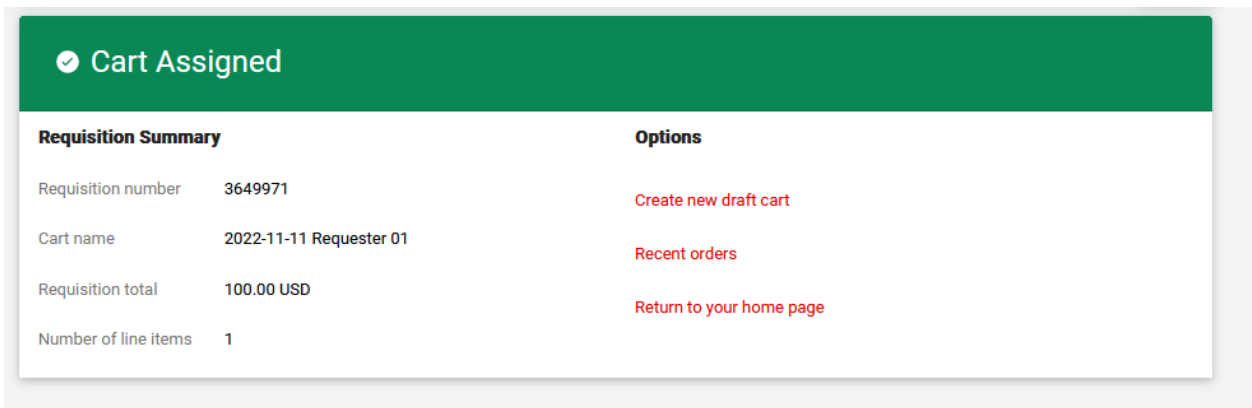
Note To Assignee:

Assign Close

Catalog No. Size/Packaging Unit Price Quantity Ext. Price

Total (100.00 US

29. Once the cart has been assigned, the following message screen will display. Shoppers can quickly navigate back to their home page to continue shopping or create a new draft cart.



Cart Assigned

Requisition Summary		Options
Requisition number	3649971	Create new draft cart
Cart name	2022-11-11 Requester 01	Recent orders
Requisition total	100.00 USD	Return to your home page
Number of line items	1	