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# JAGGAER REQUESTER CHECKLIST

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## CATALOG ORDER CHECKLIST

- Once your cart is complete, proceed to check out
- Verify business purpose/appropriateness or allowability of purchase
- Update shipping address as needed
- Verify account, fund, department, and project number are correct
- Attach any files, quote or legal documentation as necessary
- Click Place requisition

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## NON-CATALOG ORDER CHECKLIST

- Put items in your cart
- Line item – input description, amount, & quantity
- Once your cart is complete, proceed to check out
- If purchasing off an existing contract, click on the link in the checkout that allows you to associate the purchase or payment to a contract and select the appropriate contract
- Verify business purpose/appropriateness or allowability of purchase
- Add contract numbers, APR numbers or bid/RFP number
- Verify account, fund, department, and project number are correct
- Input any delivery instructions and notes to supplier
- Attach quote/Bid
- Click place requisition

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## PAYMENT REQUEST CHECKLIST

- Click on payment request form
- Put items in your cart
- Line item – input description, amount, & quantity
- Verify business purpose/appropriateness or allowability of purchase
- Add contract numbers, APR numbers or bid/RFP number
- Verify account, fund, department, and project number are correct
- Attach **Invoice**
- Add to new cart and proceed to checkout
- If purchasing off an existing contract, click on the link in the checkout that allows you to associate the purchase or payment to a contract and select the appropriate contract



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## RECEIPT ITEMS

Generally, the responsibility of receipting items falls on the PO Owner and/or the requester. For Shared Service Center customers, the department is responsible for receipting items.

- Create receipt
- Select quantity for goods or quantity or cost for services
- Input the date you physically received the items
- Complete



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# JAGGAER APPROVER CHECKLIST

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## APPROVER CHECKLIST

- Verify the supplier is an approved supplier (not debarred on [sam.gov](http://sam.gov))
- Verify account, fund, department, and project number are correct
- Verify shipping address, contract number and price, APR numbers or bid/RFP number as applicable
- Verify business purpose/appropriateness or allow-ability of purchase
- Verify that the correct form was used - non-catalog vs payment request
  - Non-catalog is for purchases from a non-catalog supplier.
  - Payment Request is to pay an invoice for a purchase already made
- Verify required documents are attached -quotes/bids for non-catalog orders, invoices on payment requests
- Review order for accuracy – amount and price
- Ensure receipting is completed for all orders

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## CLOSE PO ORDERS CHECKLIST

- Ensure receipting has occurred for all orders, catalog and non-catalog
- Ensure Invoices are paid in the system
- Close PO

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## NOTES

- Departments are responsible to make sure invoices are received from suppliers
- Invoices can be emailed to [UND.invoices@edmgroupp.com](mailto:UND.invoices@edmgroupp.com)
- Statements should be emailed to [apinvoice@und.edu](mailto:apinvoice@und.edu) and will be forwarded to the appropriate department. UND does not pay off of statements.