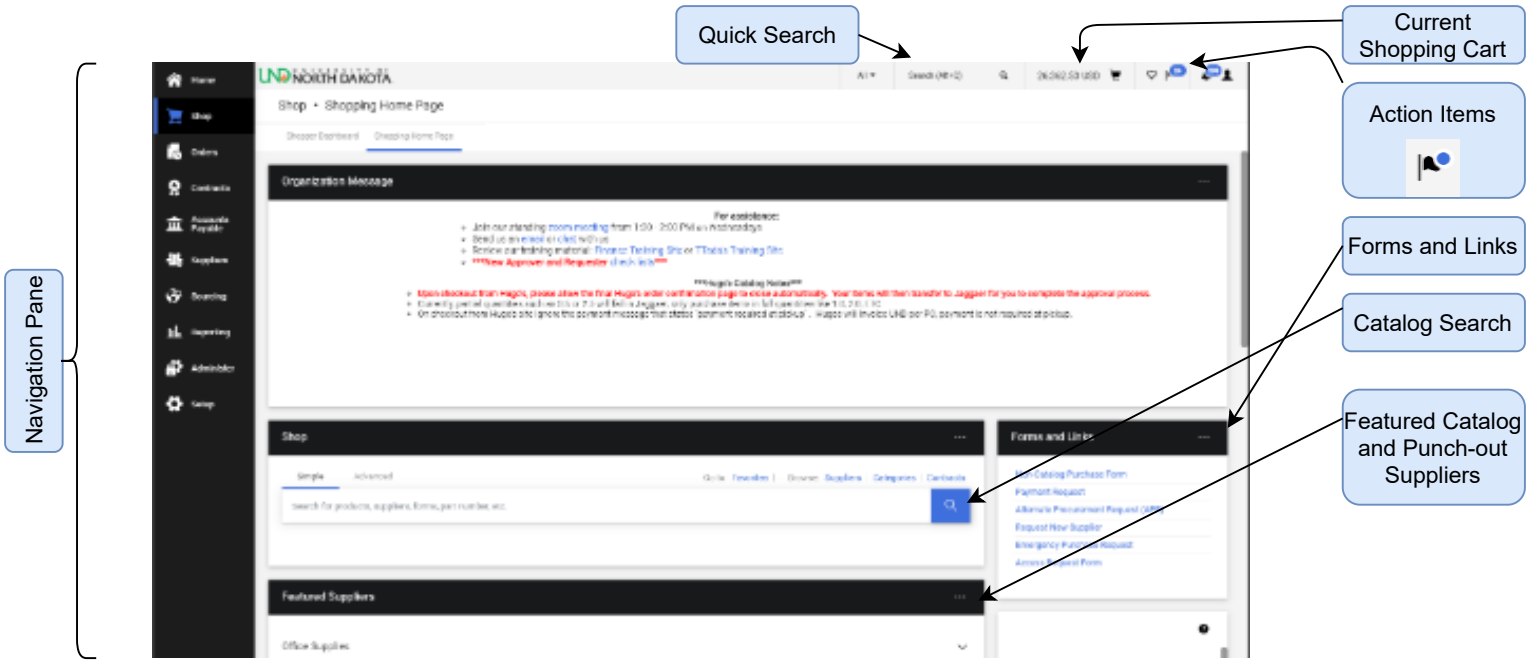
UND JAGGAER QUICK REFERENCE GUIDE

Jaggaer Home Screen and Menu Items



Getting Started

Access: https://und.edu/jaggaer
enter your NDUS account user name & password.

Navigation Pane

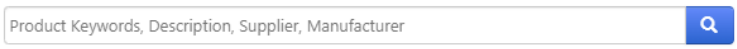
The Home icon brings you back to the main shopping page.

The Shop icon provides you access to the shopping options and carts.

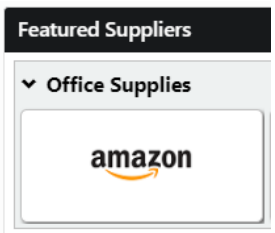
The Documents icon allows you to search orders and invoices.

Shopping Options

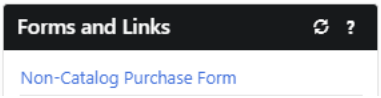
1 Search using the **search bar in Jaggaer**



2 **Search a supplier's punch-out site** under the Featured Supplier Section



3 **Complete a non-catalog purchase form** if you cannot find products or services using options 1 or 2.



Definitions

Jaggaer – e-procurement software company. Typically pronounced Jaggaer not "Yaggaer". All supplier orders and invoices are processed through Jaggaer.

Catalog Supplier – Suppliers that have hosted catalog's setup within Jaggaer or a punch-out site setup.

Punch-out – a supplier website specific to UND accessed by selecting the supplier's icon within Jaggaer.

Hosted catalog – a catalog of items suppliers maintain in our site that are searchable via the Jaggaer search bar.

Cart – a container with items the shopper has selected to purchase.

Requisition – a cart that has been reviewed and submitted by a requester. The requisition goes through an approval workflow for review.

Purchase Order (PO) – generated after a requisition has been approved and sent to the supplier to initiate the purchase.

Receipt – electronic record that items are received.

Invoice – document from a supplier requesting payment for delivery of goods and services.

Non-Catalog Purchase Form – form used to make a purchase from a supplier that doesn't have a catalog/punch-out setup.

Payment Request - form used to pay invoices when a PO has not been issued.

Commodity Codes - a code which categorizes the product or service being purchased. UND uses UNSPSC codes. Codes are used for approval routing, spend analysis, and supplier classification.

Assigning a Cart - next steps after creating a cart

Note: those without the requester role need to assign their cart to a requester.

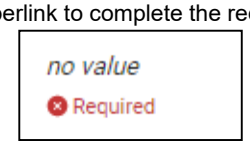
Who is my requester? Ask your department administrative staff.

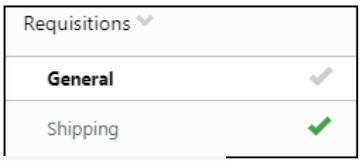
How do I assign my cart? Click on the shopping cart icon in the top right corner of the screen and click Checkout.

1 Complete any sections within the cart at the direction of your department's procedures.

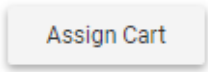
--Sections with empty mandatory fields are indicated with a grey checkmark.

--Mandatory fields are highlighted.
---Click on the hyperlink to complete the required section.

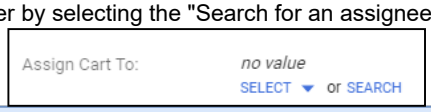




2 Once finished with completing your portion of the cart, click the Assign Cart button at the top of the page.



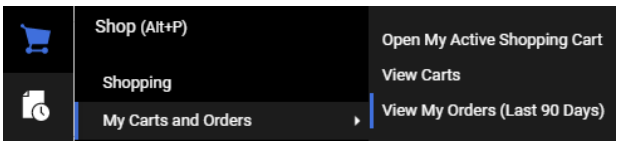
3 Search for your requester by selecting the "Search for an assignee" link, add a message if needed, and click Assign.



Where's my order?

1 **Carts review/completion by a requester** can be found by going to the shopping cart -> My Carts and Orders -> View Carts. Click on the Assigned Carts tab.

2 **Orders placed by a requester** can be found by going to the shopping cart -> My Carts and Orders -> View my Orders. Orders with a green checkmark are complete, those without are pending.



3 **Orders pending approval -** to view status click on the requisition number then view the PR Approvals section on the righthand side of the page. The step still pending will have a blue indicator.

Requester Actions

-**Note**: Once a cart is assigned to a requester, requesters must complete any remaining required fields and review the order prior to placing the requisition.
1 **view assigned carts** by clicking on the action items icon on the top right of the page, then select "Carts Assigned to Me"
2 **Click on the cart name** to open the cart then click **proceed to checkout**.
3 **Complete any remaining required fields** and click **Place Requisition** button
Tip: view the PR approval section to ensure the request passes budget check

What is...

a shopper? all Faculty and Staff are shoppers, can search and add items to their cart. Shopper can only assign their cart to a requester to review and place the requisition.

a requester? Requesters can place requisitions and are ultimately responsible for completing mandatory fields.

an approver? Approvers are one of two types, either a Departmental Approver or a Special Approver. Departmental approvers are responsible for reviewing and approving the requisition on behalf of the funding department. Special approvers are responsible for reviewing the order based on their specific University responsibilities. Some examples include: PIs, IT, Facilities, ETC.

receipting/receiving? Receipting is the acknowledging that you have received the goods or services. Without a receipt on a PO, the suppliers invoices will not be paid.

Other situations

My supplier isn't listed on the Non-Standard form - search for and select "Request New Supplier" then on the General Questions tab enter the Supplier's information

I need to change or cancel my order - work with your requester or admin staff. Depending on, the supplier may need to be notified or a new order placed.

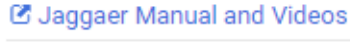
I need a funding change - work with your requester or admin staff. If the order has already been fully or partially invoiced then a journal voucher may be necessary. If not, then a change order will suffice to adjust the funding.

I need to return items - notify the supplier on the return and advise your admin staff to update the order's receipt.
I have an invoice what do I do? - invoices received that do not have a purchase order are to be paid using the payment request form.

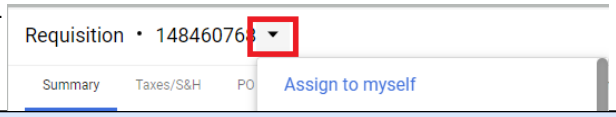
I have a contract/document that needs to be signed - legal review and signature process is handled outside of Jaggaer. Attaching signed documents to your cart may be needed for backup documentation.

Other Items

Training manuals and Videos –
https://campus.und.edu/finance/training.html#procurement
or in Jaggaer under forms and links



Comments: comments are used to add notes or to send a question to someone and keeps a history in Jaggaer. **To add or send a comment**, select the **Request/PO/Inoivce number dropdown arrow** then **Add Comment**.



Approver Actions

Note: Approvers are hard coded into the requisition workflow based in UND's or the department's business rules and requirements.
- Approvers can approve from 3 ways.
1 Log into Jaggaer and view your action items and select "Requisitions to Approve"
2 Click on the link at the bottom of the email that you receive.
3 Setup a pin number under your profile to approve from your email. See the Jaggaer Manual for setup

To Approve...
1 **Navigate to the requisition** using one of the three methods.
2 **Click on the requisition number** to view the requisition details
3 **Click Document Actions** on top right and select **Approve/Complete Step** or **Assign to Myself** for other actions.
4 Other actions include: **rejecting, returning, placing on hold.**