Jaggaer Training Manual

Last Updated: 11/26/2021 4:40:00 PM

Table of Contents

Overview of Jaggaer

Access

Jaggaer is a web-based software that can be accessed utilizing the link below. Access will be a single-sign on which uses the user name and password the individual uses to login on their computer.

Website Address: www.und.edu/jaggaer

Please login using your NDUS Account ID

ndus account id

ndus password

Sign in

Can't Access Your Account?

> Enter ndus account & Password Click Sign In
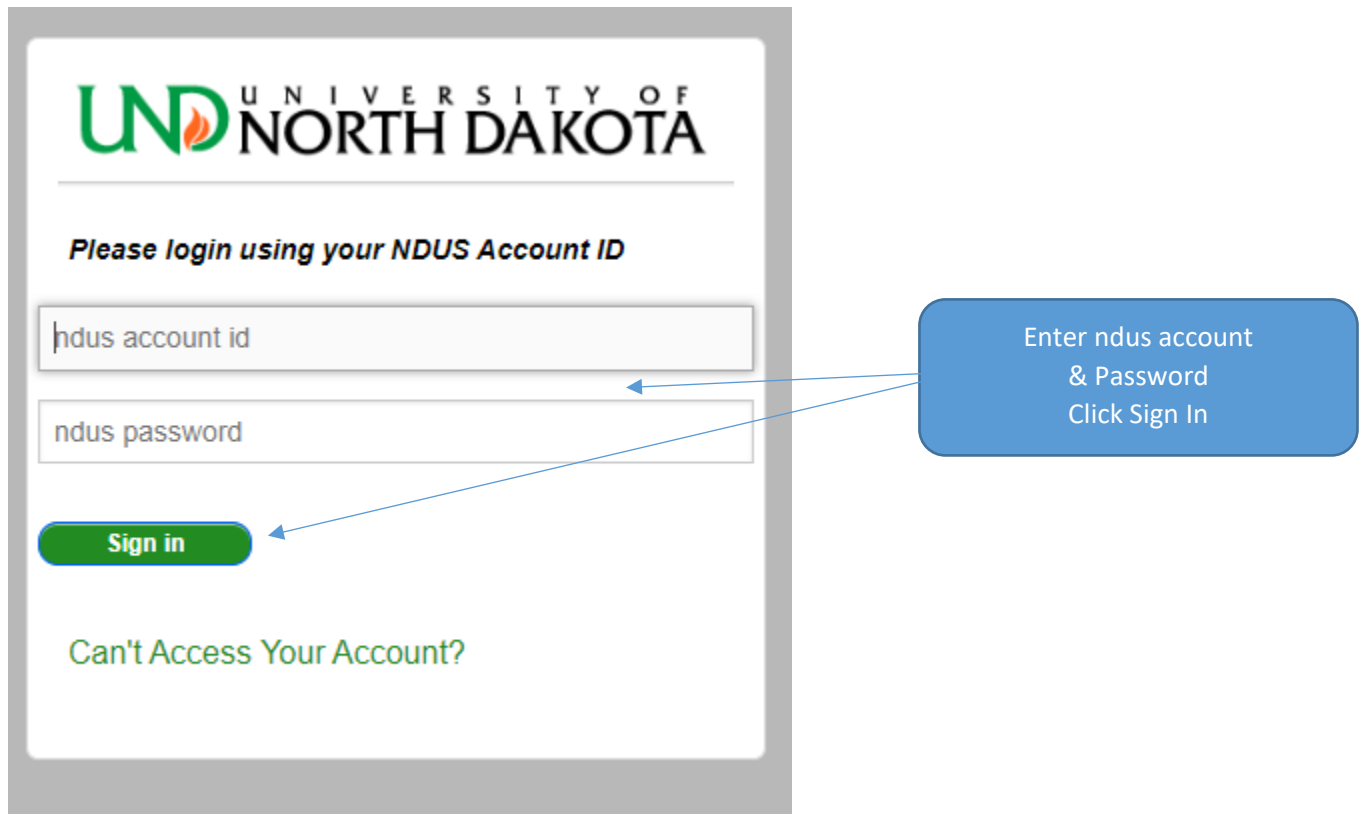
Navigation

Top of the Home Page (right side) – Snapshot of the system and items that need to be processed.

> The **Quick Search** bar is for locating documents by number

> The **Heart** icon is used to access **My Bookmarks**, useful if there is a place used frequently

> The **Bell** icon will include the number of **Notifications** you have

> Use drop down arrow to narrow search

All ▼   Search (Alt+Q)   🔍   🛒 0.00 USD   ♡ ⚑ 🔔 👤

> The **Cart** icon show the associated dollar value of items in your Carts

> The **Flag** icon will include the number of **Action Items** you have to complete

> The silhouette contains basic user information- Here you can **View your Profile**

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

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

The **Orders** icon allows you to search for documents including requisitions, purchase orders and invoices

The **Contract** icon allows you to view University Contracts.

The **Accounts Payable** icon allows you to view invoice information

The **Suppliers** icon allows you to search for current suppliers

The **Sourcing** icon allows you to view sourcing events

The **Reporting** icon allows you access to reports based on role.

Administer & Setup only available to Jaggaer Administrators

🏠 Home

🛒 Shop

📋 Orders

🎖 Contracts

🏛 Accounts Payable

👥 Suppliers

🌐 Sourcing

📊 Reporting

⚙ Administer

⚙ Setup

🔍 Menu Search

←

TIP: To See Icon Names, click the arrow at the bottom of the Page

Quick Reference Guides

[Jaggaer Quick Reference Guide](#)

[Jaggaer RMM Quick Reference Guide](#)

Shopping Home Page

The **Shop** area is where you will enter goods or services you are purchasing **OR** you can click on the Supplier tiles below to search additional products

The **Organization Message** displays useful information for the shoppers

The **Access Request Form** is where you submit request to change or remove user roles

*Note: Shopper is the default role for all of UND

Organization Message ⟳ ?

Welcome to the
University of North Dakota
E-Procurement Site

For assistance:
Join our standing zoom meeting from 1:00 - 2:00 PM CT on Wednesdays and Thursdays, send us an email, or chat with us.
Jaggaer Training Videos

Forms and Links ⟳ ?

Non-Catalog Purchase Form
Payment Request
Access Request Form

?

Request Sourcing Event
Request New Supplier
☑ Jaggaer Manual and Videos
☑ Frequently Asked Questions
☑ Commodity Code List
☑ Requesters and Approvers List
☑ Account Codes
☑ UND Finance Policies
☑ Intl Wire Transfer Form
☑ Other Contracts
☑ Procurement Decision Tree

🛒 **Shop** ⟳ ?

Search | Everything ▼ | Product Keywords, Description, Supplier, Manufacturer | 🔍
Advanced Search

Shortcuts   Browse
Favorites   Suppliers | Categories | Contracts

Finance Blog ⟳ ?

☑ Jaggaer Training   10/28/2020 8:06 AM
Do you need training on Jaggaer? There are four ways you can receive the training.
1. Zoom session https://und.zoom.us/j/9...

☑ Accounts added to Jaggaer
                    10/27/2020 11:12 AM
The following account codes have been

Featured Suppliers ⟳ ?

⌄ **Office Supplies** ?

amazon | (in) innovative | Office DEPOT virtual card | STAPLES virtual card

⌄ **Computing & Electronics** ?

 virtual card | B&H virtual card | CDWG virtual card | DELL virtual card | Digi-Key Only PO <10K / virtual card

The **Featured Suppliers** shows tiles of the suppliers that have a catalog setup.

The **Non-Catalog Purchase Form** will be utilized if you are not able to find your item in a catalog.

The **Payment Request Form** will be utilized for an invoice on an order that was not placed through Jaggaer.

The **Request Sourcing Event Form** will be utilized when a Bid/RFP/RFQ, Etc. are required

New Supplier Form will be utilized when you are working with a new supplier.

The Form and Links section also provide useful tips and links for training.

TIP: If you do not find the item you are shopping for in the Shop search bar, use the Feature Supplier's catalog tile to punch out directly on the Supplier's page to search for your item

Searching for Carts, Orders and Documents

There are several ways to search for Carts (Items that have not been submitted for a requisition) and Pending Orders/Requests (Items that have been submitted as a requisition).

Order Search

(1) Go to the left bar and select the **Shopping cart**, then **My Carts and Orders**
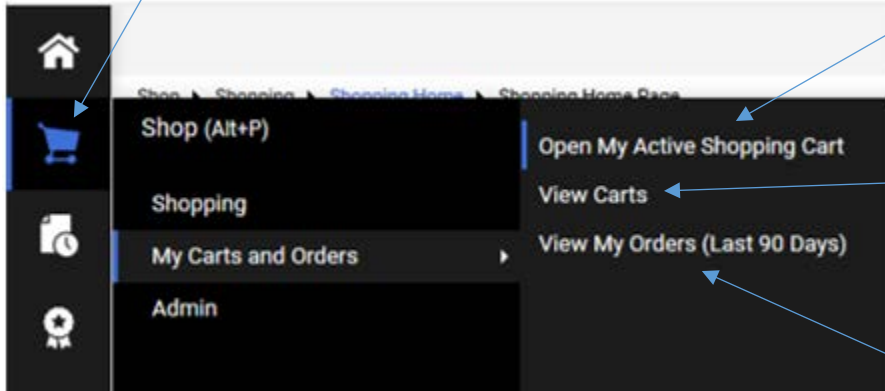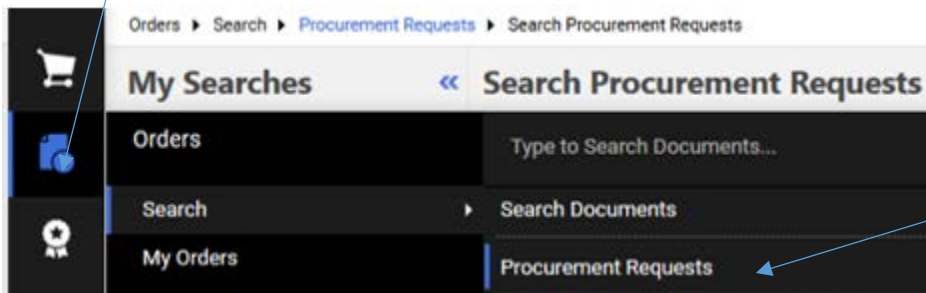
(2) Open **My Active Shopping Cart** which will show any cart that is in progress and not assigned

(3) Open **View Carts** to see both **Active Carts** and **Carts Assigned**

(4) Open **View My Orders** to view orders you have created in the past 90 days

Incomplete Non-Catalog Order Form Search

(1) Go to the left bar and select **Orders**.

(2) Open **Procurement Requests** which will show any Non-Catalog Forms that have not been submitted.

TIP: This search is to find Non-Catalog Order forms that are in Draft state (considered an Incomplete Status) and are not currently attached to a cart/requisition.

Orders Search

(1) Go to the left bar and select **Orders**.

(2) Go to the **Search** which allow you to search for Requisitions, Purchase Orders and Invoices

Search Page Preview

(1) Filters are in the left column to narrow your search
(2) Another option is available to Add Filter

Find previously saved searched on the left side under **Manage Searches** by clicking on My Searches

Use the Gear on the right side to create a custom filter and reorder columns

☰ **Search Requisitions**

🖫 Save As ▾   ⚲ Pin Filters ▾   ⤒ Export All ▾

| Quick Filters | My Searches |
| Manage Searches |
| My Recent Approvals |
| My Requisitions |

Submitted Date: Last 90 days ▾ | Quick search   ⚲ ❶ | Add Filter ▾   Clear All Filters   ?

‹ ›   Page 1 of 34   1-200 of 6695 Results   ⚙ 200 Per Page ▾

☐ Requisition Number ▾   Supplier   Requisition Name   Requisition Status ▾   Prepared For   Submitted Date ⊙   Total Amount ▾

Configure Column Display   ✖

Reflects the columns defined for the current search. Customizations will apply to the lifetime of the current search unless the search is saved. Columns marked with an * are custom defined data elements

Type to Filter Available Columns...   ☐ Pin Columns as my defaults

☐ Account *   ⋮⋮ Requisition Number   ↑ ↓
☐ Accounting Date   ⋮⋮ Supplier   ↑ ↓ 🗑
☐ Activity *   ⋮⋮ Requisition Name   ↑ ↓ 🗑
☐ Activity On Hand *   ⋮⋮ Requisition Status   ↑ ↓ 🗑
☐ Activity_ID *   ⋮⋮ Prepared For   ↑ ↓ 🗑

Apply   Cancel

TIP: If you save your search in a personal folder (you will need to create one the first time), you will be able to find that search again easily using the **Manage Searches** function above

Roles

There are three roles within this Procure to Pay system. Each involves significant automation and role expectations intended to make university policy adherence easier for all those involved.

Roles are assigned by the Jaggaer Administrators. Roles can be added or removed to a user utilizing the **Access Request Form** on the Jaggaer Shopping Home Page.

Forms and Links ↻ ?

Non-Catalog Purchase Form
Payment Request
Access Request Form
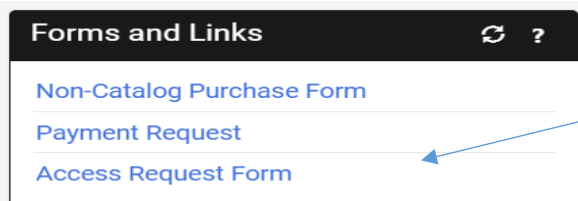
- **Shoppers**: All Jaggaer Users are Shoppers. The work involved in this role is described in the **Shopping** section and includes how to shop using Hosted and Punch-out Catalogs, as well as how to shop for Non-catalog goods or services.
- **Requestors:** These individuals will be responsible for the financial aspect of the order which includes the proper Accounting Chartfields, Ship to information, and Business Purpose.
- **Approvers**: There are several types of approvers.
    - o Department Approvers: Department approval is completed on behalf of the funding department. A department approver **cannot** be a Requestor. There must be two people in the order process.
    - o Special Approvers: There have been several workflow steps created to automatically route purchases for approval based on set criteria based on compliance with UND policies. A Special Approver **can** be a Requestor if needed (by request).
        - ▪ **Special Approvers will evolve as needs of the organization change and necessary items are identified.
        - ▪ Capital Expense Approver
            - • Stops for Accounts between 690000 and 699999
        - ▪ Chemical Approver – CAS Review
            - • Stops for products that are hazardous, radioactive, toxins, as well as certain commodity codes that are identified as chemicals, explosives, drugs.
        - ▪ Export Controls Approver
            - • **Stops for live plants, animals, chemicals, fuels, machinery, electronics, testing equipment, law enforcement, drug

              **list will evolve as export controls office has a better understanding of orders.
        - ▪ Facilities Approver
            - • Furniture, facility services, land, HVAC, Fire alarm systems, waste services
        - ▪ Food and Travel Approver
            - • Individuals, Food and Travel commodities or account codes.
        - ▪ Grants Approver
            - • Any grant project over $5000
            - • Identified account codes based on grants office specifications, regardless of dollar value
        - ▪ IT Director Approver
            - • **IT Hardware and software commodities for each IT directory.
            - • UND monitors' computer end points and peripherals and software.

              **Dependent on each IT director by college.
        - ▪ IT Approver
            - • CIO approval for software >$5K
        - ▪ PI Approver
            - • All projects require PI approval.
        - ▪ Procurement Approval
            - • Orders >$10K
            - • Alternate Procurement Requests
            - • Change requests
        - ▪ Secondary Department Approvers
            - • **Dependent on each department specifications
        - ▪ Supplier Administration Approver
            - • Any orders when the supplier is "Request New Supplier".

Shopping

UND has created a number of catalogs which utilize UND agreed upon pricing. Purchases from catalogs will be the best method to make a purchase.

Catalog Shopping

Hosted Catalog

Hosted Catalogs provide access to negotiated prices UND maintains with our preferred suppliers. Items in a hosted catalog will show in the shop section or you can access by using the catalog tile.

There are two options to search a Hosted Catalog – see below:

(1) Once logged in, from the Shopping Home Page, go to the Shopping Bar in the Shop section and type in the item to purchase
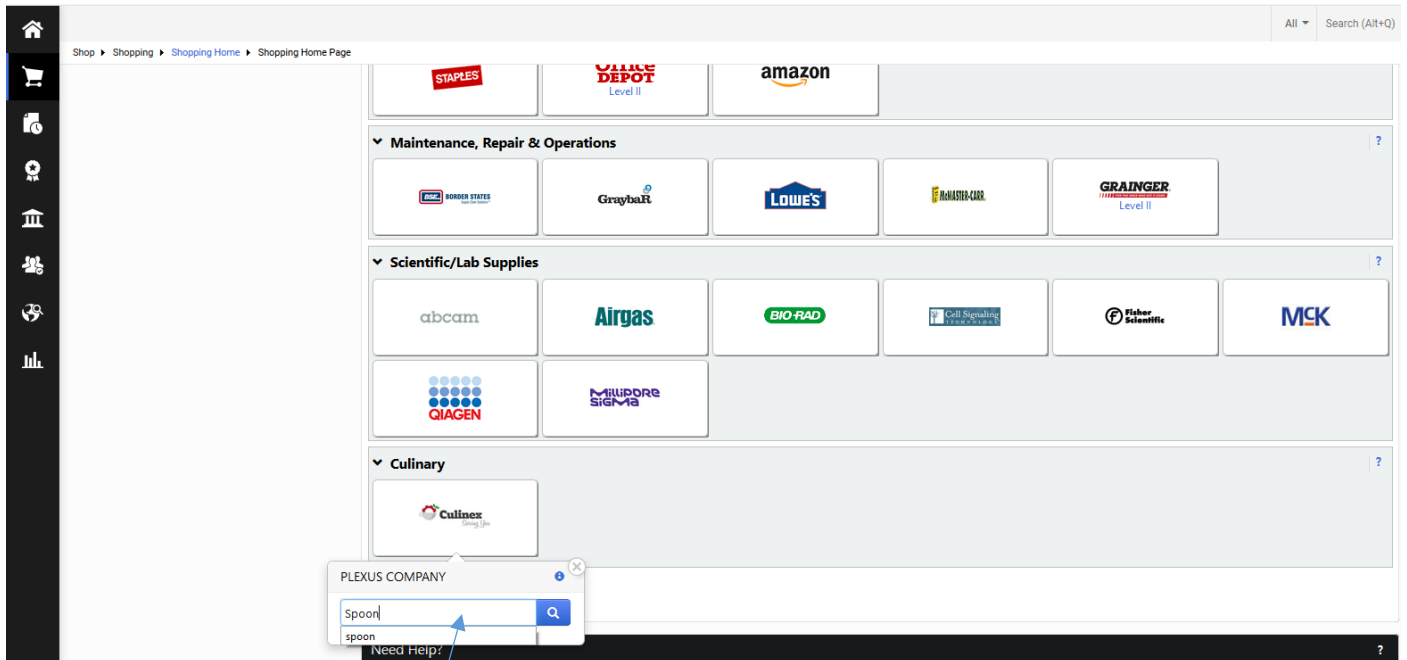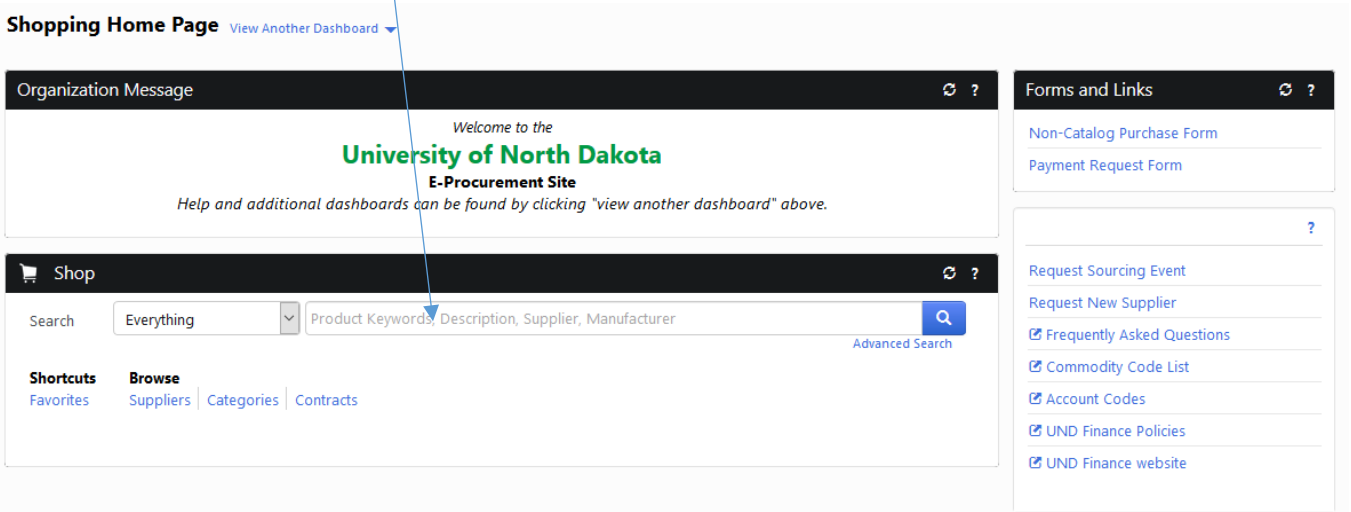
(2) Click on the Supplier Tile and enter what you are looking for in the search bar and click search

TIP: Clicking on a Punch-our supplier will redirect to their website. Refer to Punch-out Catalogs section for directions.

(3) Refine results using multiple filtering options or enter a keyword

(4) Sort the items based on the set criteria under Sort by

All ▾ | Search (Alt+Q) | 🔍 | 🛒 0.00 USD | ♡ 🏳 🔔 👤

Shop ▸ Shopping ▸ Shopping Home ▸ Product Search - All

Shop | Everything ▾ | Spoon | **Go**

Go to: advanced search | favorites | forms | non-catalog item   Browse: suppliers | categories | contracts

Results for: Everything : PLEXUS COMPANY + Spoon

Showing **1 - 18** of 18 Results | Compare Selected: 0

Add Keywords ?

[   ] **Go**

Filter Results ?

By Supplier

Showing only results matching:

PLEXUS COMPANY (18)

By Category 🔽

Commercial use measuring cups (1)
Cookware and kitchen tools (10)
Food service flatware (1)
Tabletop and serving equipment (6)

By Commodity Code

48100000 (18)

By Packaging UOM

CS (8)
EA (10)

By Result Type

Products (18)

By Manufacturer 🔽

Cambro Manufacturing (2)
Carlisle Foodservice (2)
Oneida (1)
Steelite International Usa,Inc (1)
Vollrath Company (10)   more...

Results Per Page 20 ▾   Sort by: Best Match ▾   ◀ Page 1 of 1 ▶ ?

Deli Spoon, 10", Polycarb, Black, Hang Hole, Cs/12 from PLEXUS COMPANY   **21.81** USD
Part Number   C SPO10CW-110   CS
Manufacturer Info   SPO10CW110 - (Cambro Manufacturing)   [1] Add to Cart ▾
add favorite | compare

Deli Spoon, 8", Polycarbonate Black, Hang Hole, Cs/12 from PLEXUS COMPANY   **19.94** USD
Part Number   C SPO8CW110   CS
Manufacturer Info   SPO8CW110 - (Cambro Manufacturing)   [10] Add to Cart ▾
add favorite | compare

Windsor III Bouillon Spoon, 6", 18/0 stainless steel, Delco® from PLEXUS COMPANY   **333.56** USD
Part Number   ON B401SBLF   CS
Manufacturer Info   [1] Add to Cart ▾

(5) Identify the item you wish to purchase and enter the quantity

add favorite | compare

Measuring Spoon Set, **milliliters, set contains;**   **4.99** USD
Part Number   EA
Manufacturer Info   (Vollrath Company)   [1] Add to Cart ▾
add favorite | compare

*** SoftSpoon™, 16-1/2" Spoon-Shaped Spatula, dishwasher safe, flexible blade retains shape to 212°, NSF, Made in USA from PLEXUS COMPANY
Part Number   VOL 52116
Manufacturer Info   52116 - (Vollrath Company)   add favorite | compare

(6) Select **Add to Cart**

Serving Spoon, Perforated White Handle, 13-13/16" from PLEXUS COMPANY   **131.12** USD
Part Number   VOL 6414215   CS
Manufacturer Info   6414215 - (Vollrath Company)   [1] Add to Cart ▾

(7) Select the **Cart** icon at the top and select **View Cart**

Shop ▸ Shopping ▸ Shopping Home ▸ Product Search - All

All ▾ | Search (Alt+Q) | 🔍 | 🛒 199.40 USD | ♡ 🏳 🔔 👤

My Cart

Shop | Everything ▾ | Spoon

Culinex   **Deli Spoon, 8", Polycarbonate B...**   View My Cart
Quantity: 10
Price: 199.40 USD 🗑   Checkout

Go to: advanced search | favorites | forms | non-catalog item   Browse:

Results for: Everything : PLEXUS COMPANY   199.40 USD

(9) Select Assign Cart

Shop ▸ My Carts and Orders ▸ Open My Active Shopping Cart ▸ Cart - 138251208 - Draft Requisition   ⟲ Logout

⊕ Continue Shopping

🛒 Shopping Cart for Tonya Parton   1 Item(s) for a total of **132.66** USD

🖨   **Proceed to Checkout** or **Assign Cart**

| | | Save | |

Supplier / Line Item Details							?

Show line details   For selected line items Add to Favorites ▾ Go

PLEXUS COMPANY more info...
PRIMARY-ACH edit
1802 1st Ave S, PO BOX 2925, FARGO, ND 58108-2925 USA

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	☐
1	Serving Spoon, Slotted, 12" S/S Hollow Handle W/Gold Swirl more info...	VOL 46650	CS	132.66	1 CS	132.66 USD	☐
				Select price or contract...			
				Supplier subtotal		132.66 USD	

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking,   **Subtotal**   132.66
and workflow approvals.   Shipping   0.00

(10) Select the appropriate Assignee

(11) Enter a note to assist the requestor if necessary.

All ▾ Search (Alt+Q)   🔍   🛒 199.40 USD   ♡ ⚑● 🔔● 👤

Shop ▸ My Carts and Orders ▸ Open My Active Shopping Cart ▸ Cart - 2870571 - Draft Requisition

🏠 🛒 🕐 🏅 🏛 👥 🌐 📊 🔍

Shopping Cart for   10 Item(s) for a total of **199.40** USD
                                                     subtotal: 199.40 USD
Name this cart: Dining Spoons   estimated tax, shipping & handling: 0.00 USD

Assign Cart: User Search   ✕

☐ Select from profile values ⓘ ⦿ Search for an assignee   d to Checkout or **Assign Cart**

Have you made changes? Updat   Selected Assignee: Jana K Thompson   Perform an action on (0 items selected)... ▾

Culinex PLEXUS CON   Assign Cart To: Search for an assignee

Product Description		Add to Profile: ☐ Add to Profile	it Price	Quantity	Total ☐
Deli Spoon, 8", Polycar		Note To Assignee:	19.94	10	199.40
Part Number C SP		Please complete the request for spoons at Wilkerson.	CS	Shipping	0.00 USD
Manufacturer Info SPO8				Update	Handling 0.00 USD
Commodity Code 4810			Actions ▾		
Instit		Assign Close			
		Supplier subtotal			199.40 USD

(12) Click Assign

Punch-out Catalogs

Punch-out Catalogs are maintained on the Supplier's website. Click on the tile on for the supplier on the dashboard or an item in a shopping list. This will redirect you to the Supplier's website. The punch-out catalog will provide negotiated prices which are maintained by our suppliers.

Each supplier's punch-out catalog is slightly different so below is an *example* of a catalog.

(1) Catalogs can be found under Featured Suppliers

(2) You can enter an item in the shopping Area as well

TIP: This will take you out of Jaggaer temporarily so you can shop on the supplier's website.

(3) When you punch out to a supplier site, enter the search criteria in the appropriate location, such as the suppliers search bar

(4) Add your item to the cart and click the check out or cart button depending on which site you are utilizing

(5) **Submit your cart for approval** within the Supplier catalog

TIP: The checkout process is different for each supplier so you may need to click through a couple different screens.

TIP: Often Punch out Suppliers require changes in their punch out site. If an item needs to be changed once it is in Jaggaer, you will likely need to restart the shopping process

(6) The supplier will return the items to Jaggaer and place it in your Cart at the top.

All ▼ Search (Alt+Q) 🔍 🛒 10.80 USD ♡ 🏳 🔔 👤

Shop ▸ My Carts and Orders ▸ Open My Active Shopping Cart ▸ Cart - 2872581 - Draft Requisition

Shopping Cart for Anna Leddige

Name this cart: 2020-01-22 0309796 01

⊙ Continue Shopping

1 Item(s) for a total of **10.80** USD
subtotal: 10.80 USD
estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

Have you made changes? Update 🖨 | ? Help Add Non-Catalog Item Empty Cart Create New Cart Perform an action on (0 items selected)... ▼ Select All ☐

amazon | AMAZON.COM more info...

The item(s) in this group was retrieved from the supplier's website. What does this mean?

You can no longer access this item(s) on the supplier's website. What does this mean?

Line(s): 1

Product Description	Unit Price	Quantity	Total ☐
PILOT G2 Premium Refillable & Retractable Rolling Ball Gel Pens, Fine Point, Black Ink, 12 Count (31020)	10.80 EA Update	1 Shipping Handling	10.80 0.00 USD 0.00 USD ☐
Part Number B001GAOTSW			
Manufacturer Info 31020 - (Pilot)			
Commodity Code 44121700 🔍 Writing instruments			
		Supplier subtotal	**10.80** USD

16

Non-Catalog Items

The non-catalog form is utilized to purchase goods and services from non-catalog suppliers.

(1) On the right hand side select **Non-Catalog Purchase Form**

(2) **Instructions** section provides direction and clarification on the form. Once you have read them, click **Next**

(3) **Suppliers** section provides the supplier information. Enter the Supplier name and click **Search**

Non-Catalog Purchase F...

Form Number	**424058**
Purpose	**Procurement Request**
Status	**Incomplete**

Instructions

Suppliers ✓

Attachments ✓

Item Attribute Defaults - (... ✓

Form Fields ✓

   General Questions ✓

   Items ✓

Review and Submit

Suppliers　　　　　　　　　　　　　　　　　　Request Actions ▾　History　?

Supplier　　　　　　Please select a fulfillment center below.

Search Registered Suppliers (select "Request New Supplier" if supplier not found)

Supplier	J&J Calibration
Relationship	All
Zip Code	_____ Within 5 Miles

Clear　🔍 Search

‹ Previous　　Next ›

TIP: If the supplier does not display in the search, choose "Request New Supplier" as a supplier. (See Supplier Management section of this manual) This will route the order to the Supplier Admin team to review and setup.

(4) Review the results and select the appropriate vendor if applicable.
Click **Next**

Non-Catalog Purchase F...

Form Number	**424058**
Purpose	**Procurement Request**
Status	**Incomplete**

Instructions

Suppliers ✓

Attachments ✓

Item Attribute Defaults - (... ✓

Form Fields ✓

   General Questions ✓

   Items ✓

Review and Submit

Suppliers　　　　　　　　　　　　　　　　　　Request Actions ▾　History　?

Supplier　　J & J CALIBRATION SERVICES
PRIMARY-ACH-1099: 460 MAIN AVE, PO BOX 63, WALCOTT, ND 58077-0063 USA

❯ Modify Search

Supplier Name	Doing Business As	Fulfillment Centers	Action
👥 J & J CALIBRATION SERVICES		**PRIMARY-ACH-1099: (preferred)** 460 MAIN AVE, PO BOX 63, WALCOTT, ND 58077-0063 USA	✓ Selected

‹ Previous　　Next ›

(5) **Attachments** section: Attach quotes and supporting documents for this purchase.
Click **Add Attachments**

Non-Catalog Purchase F...

Form Number	**424058**
Purpose	**Procurement Request**
Status	**Incomplete**

Instructions

Suppliers ✔

Attachments ✔

Item Attribute Defaults - (... ✔

Form Fields ✔

   General Questions ✔

   Items ✔

Review and Submit

Attachments

Request Actions ▾ | History | ?

Please add your attachments below.

Add Attachment

‹ Previous | Save Progress | Next ›

(6) Select **Upload**

Add Attachment ✕

Attachment ★   *No File Attached*   Upload

★ Required

Save Changes | Close

Upload ✕

Title ★   Quote

File ★   Browse... %3110.pdf
Maximum upload file size: 25.0 MB

★ Required

Save Changes | Close

(7) Input the Title of the document and click **Browse** or Choose File to find your file location. Then Select **Save Changes.**

Add Attachment   ×

Attachment ★   ⬇ Quote   [Upload ▼]

★ Required   [**Save Changes**] [Close]

(8) Select **Save Changes again**

Non-Catalog Purchase F...

Form Number	**424058**
Purpose	**Procurement Request**
Status	**Incomplete**

Instructions

Suppliers ✔

Attachments ✔

Item Attribute Defaults - (... ✔

Form Fields ✔

   General Questions ✔

   Items ✔

Review and Submit

Attachments   Request Actions ▾   History   ?

#	Attachment	
1	⬇ Quote	[Edit ▼]

[Add Attachment]

[‹ Previous] [Save Progress] [Next ›]

(9) Select **Next**

Non-Catalog Purchase F...

Form Number	**424058**
Purpose	**Procurement Request**
Status	**Incomplete**

Instructions

Suppliers ✔

Attachments ✔

Item Attribute Defaults ... ✔

Form Fields ✔

   General Questions ✔

   Items ✔

Review and Submit

Item Attribute Defaults - (For non-catalog orders, only complete the "Health and Safety" section as applicable.)

Request Actions ▾   History   ?

Capital Expense   ○ Yes   ● No

Taxable   ○ Yes   ● No

UNSPSC   [_____]

Catalog No.   [_____]

Commodity Code   –   [Edit]

Health and Safety   ☐ Controlled substance
                      ☐ Recycled
                      ☐ Hazardous material
                      ☐ Radioactive
                      ☐ Rad Minor
                      ☐ Select Agent
                      ☐ Toxin
                      ☐ Energy Star
                      ☐ Green

[‹ Previous] [Save Progress] [Next ›]

(10) **Item Attribute Defaults** section allows for chemical coding. Disregard all sections except Health and Safety. Mark the appropriate box if applicable and click **Next**.

20

(11) Form Fields section is a landing page for future questions. Click **Next**.

Non-Catalog Purchase F...

Form Number	424058
Purpose	Procurement Request
Status	Incomplete

Instructions
Suppliers ✔
Attachments ✔
Item Attribute Defaults - (... ✔
Form Fields ✔
   General Questions ✔
   Items ✔
Review and Submit

Form Fields

Request Actions ▾ | History | ?

Overview	Progress
General Questions	⊘ Incomplete
Items	✅ Required fields complete

‹ Previous   Next ›

Form Number	3230054
Purpose	Procurement Request
Status	Incomplete

Instructions
Suppliers ✔
Attachments ✔
Item Attribute Defaults - (... ✔
Form Fields ✔
   General Questions ✔
   Items ✔
Review and Submit

★ Response Is Required
🔍 Field Name Is Searchable

⌄ **General Questions**

Select one of the following (see help text): ★ ⓘ

○ Purchase is under $10k
○ Alternate Procurement Request
○ Purchase of items from a Bid/RFP or items from a UND, NDUS, State, other Cooperative contrac
○ Purchase is for a Subrecipient/Subaward
○ Emergency Purchase
○ Exempt Purchase

If you intend to request a Bid or RFP, please complete the "Request Sourcing Event" form on the Shopping Home Page.

(12) General Questions section shows questions which will drive additional tabs to display when necessary. First question asks which **Procurement Action** was completed. Select the appropriate option.

Items ✔
Review and Submit

Are you requesting a new supplier? ★

◉ Yes   ○ No

Supplier Name

(13) New Supplier: Select Yes if the supplier did not display in step 4. Then enter the Supplier Name & Email/Phone Information

TIP: These boxes only show when creating a new supplier

Supplier email or phone number

(14) IT Purchase: If the purchase is for hardware, software or apps, select Yes.

Does this purchase consist of IT hardware, software, apps? Review help text. ★ 🔍 ⓘ

◉ Yes   ○ No

(16) Select Next

‹ Previous   Save Progress   Next ›

TIP: Click the Question Mark by a heading to get additional information about the question.

(20) Items: Enter the item that you are purchasing.
- Unit Price & Quantity
- Description & Catalog #
Be specific as this is what is sent to the supplier to fulfill the order.

Non-Catalog Purchase F...

Form Number	**424058**
Purpose	**Procurement Request**
Status	**Incomplete**

Instructions

Suppliers ✔

Attachments ✔

Item Attribute Defaults - (... ✔

Form Fields ✔

    General Questions ✔

    Alternate Procurement Fo... ✔

    Contract Questions ✔

    IT Non-Standard Form ✔

Items ✔

Form Fields - Items

Request Actions ▾ | History | ?

Items

Item 1

Unit Price: `66.00` USD Quantity: `2.0000` Total 0.00 USD

Product Description: `Cable Tension Gage Calibration w/Certifccation`

953 characters remaining

Catalog No.: `C100`

Commodity Code: 72100000 - Building and facility maintenance and repair services [Edit]

Item 2

Unit Price: ` ` USD Quantity: ` ` Total 0.00 USD

[‹ Previous] [Save Progress] [Next ›]

Commodity Codes

`Repair` 🔍

Commodity Code	Description	
23140000	Leatherworking repairing machinery and equipment	Select
72100000	Building and facility maintenance and repair services	Select
72152700	Concrete installation and repair services	Select
78180000	Transportation repair or maintenance services	Select
85160000	Medical Surgical Equip Maint Refurbishment and Repair Srvs	Select

[Close]

(21) Commodity Code: Click the **Edit** button by Commodity Code, Enter the appropriate description and **select** the commodity. This is important as it drives the workflow routing.

(22) When complete click Next.

Non-Catalog Purchase F...

Form Number	**424058**
Purpose	**Procurement Request**
Status	**Incomplete**

Instructions

Suppliers ✔

Attachments ✔

Item Attribute Defaults - (... ✔

Form Fields ✔

  General Questions ✔

  Alternate Procurement Fo... ✔

  Contract Questions ✔

  IT Non-Standard Form ✔

  Items ✔

Review and Submit

Review and Submit

Request Actions ▾ | History | ?

✔ Required Fields Complete

Section	Progress
Suppliers	✔ Required Fields Complete
Attachments	✔ Required Fields Complete
Item Attribute Defaults - (For non-catalog orders, only complete the "Health and Safety" section as applicable.)	✔ Required Fields Complete
Form Fields	✔ Required Fields Complete

‹ Previous   Add to Favorites   Add and go to Cart ▾

(23) When you have all green checks on the left hand side, the form is complete. Click '**Add and go to Cart**'. If not complete, click on the appropriate section and complete required information.

Request Added to Cart

Shopping Cart for request2

Name this cart: `2020-01-21 request2 01`

◀ **Continue Shopping**

2 Item(s) for a total of **132.00** USD

subtotal: 132.00 USD
estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

Have you made changes? Update   🖨 | ⑦ Help   Add Non-Catalog Item   Empty Cart   Create New Cart   Perform an action on (0 items selected)... ▾   Select All ☐

J & J CALIBRATION SERVICES   more info...

Product Description		Unit Price	Quantity	Total ☐
Non-Catalog Purchase Form open form...	Update			132.00 USD ☐
	More Actions ▾		Shipping	0.00 USD
Select one of the following: Purchase is over $10k and no Bid/RFP completed			Handling	0.00 USD
Cable Tension Gage Calibration w/Certifccation		66.00	2	132.00 USD
Part Number C100				
Select one of the following: Purchase is over $10k and no Bid/RFP completed				
Commodity Code `72100000` 🔍 Building and facility maintenance and repair services				
			Supplier subtotal	**132.00** USD

(24) The form will then be added to your cart.

Assigning a Cart

(1) Once you have all the items you are purchasing in your cart and if you do not have the requestor role, you will need to assign the cart to a requestor to complete the requisition. Click '**Assign Cart**'

Shopping Cart for request2

Name this cart: 2020-01-21 request2 01

◀ Continue Shopping

2 item(s) for a total of **132.00** USD
subtotal: 132.00 USD
estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

Have you made changes? Update | 🖨 | ❓ Help | Add Non-Catalog Item | Empty Cart | Create New Cart | Perform an action on (0 items selected)... ▾ | Select All ☐

J & J CALIBRATION SERVICES more info...

Product Description		Unit Price	Quantity	Total ☐
Non-Catalog Purchase Form open form...	Update			132.00 USD ☐
	More Actions ▾		Shipping Handling	0.00 USD 0.00 USD
Select one of the following: Purchase is over $10k and no Bid/RFP completed				
Cable Tension Gage Calibration w/Certifccation		66.00	2	132.00 USD
Part Number C100				
Select one of the following: Purchase is over $10k and no Bid/RFP completed				
Commodity Code 72100000 🔍 Building and facility maintenance and repair services				
			Supplier subtotal	**132.00** USD

Assign Cart: User Search ✕

◯ Select from profile values ❓ ⦿ Search for an assignee

Selected Assignee:

Assign Cart To: Search for an assignee

Note To Assignee:

Assign **Close**

User Search

Last Name ❓	Walski
First Name ❓	Melissa
User Name ❓	
Email ❓	
Role ❓	
Results Per Page	10

Search

(2) If you have not set up a default assignee, select '**Search for an assignee**', enter the requestor's name and select **Search**. Then Click **Select** for the correct requestor.

New Search

Name ▲	User Name △	Email △	Phone	Action
Walski, Melissa	0268072	melissa.walski@ndus.edu		[select]

Assign Cart: User Search

×

○ Select from profile values ❔ ● Search for an assignee

Selected Assignee: Melissa Walski

Assign Cart To: Search for an assignee

Add to Profile   ☐ Add to Profile

Note To Assignee:

Assign   Close

(3) Click '**Assign**'

TIP: If you would like to save the assignee as a default, check **Add to Profile**.

Creating a Requisition

The requestor can access the assigned cart through an e-mail notification or the Jaggaer home page.

UNIVERSITY OF
UND NORTH DAKOTA

Re: A shopping cart has been assigned to you
Cart Name: 2020-01-31 request2 01
Cart Number: 2881241
Prepared for: request2
Prepared by: Anna Leddige

Dear Anna Leddige

A shopping cart has been assigned to you by request2 (anna.leddige@ndus.edu).
The shopping cart can be accessed for review in "Draft Carts" or by selecting the
URL below.

https://usertest.sciquest.com/apps/Router/ViewAssignedCarts?
AuthUser=5657730&ParamAction=View&CartId=2881241&tmstmp=1580495796275

If applicable, the user has submitted the following additional comments:

Please approve my office supplies.

If you have any questions with regard to this shopping cart, please contact your
UND Procurement Support Team.

Support Team Contact Information:
+1 701-777-2771 UND.PPS@UND.edu

Thank you,
University of North Dakota

(1A) The requestor will receive an email with a link to the shopping cart

(1B) From the Home Page, Click the Flag icon and select Action Items, Carts Assigned to Me

| All ▼ | Search (Alt+Q) | Q | 🛒 0.00 USD | ♡ 🚩 🔔 👤 |

Action Items

My Assigned Approvals

Carts Assigned To Me   2
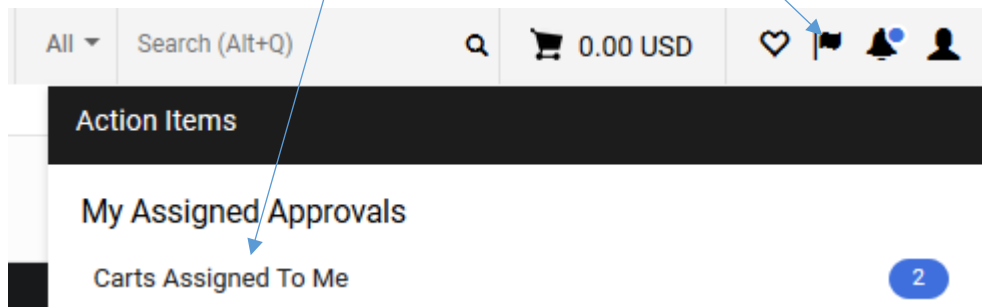
Cart Management

Create Consolidated Cart   Create Cart

Draft Carts 🛒   Assigned Carts

(2) Choose the appropriate cart

Assign Substitute

› Filter Assigned Carts

Type ⬆	Cart Number ⬆	Shopping Cart Name ⬆	Cart Description	Date Created ⬆	Total ⬆	Created By ⬆	Assigned To ⬆	Action
Normal	2870571	Dining Spoons		1/21/2020	199.40 USD	request2	Anna Leddige	View ▼
Normal	2881241	2020-01-31 request2 01		1/31/2020	10.49 USD	request2	Anna Leddige	View ▼

Shop ▶ My Carts and Orders ▶ Open My Active Shopping Cart ▶ Cart - 2881241 - Draft Requisition

Shopping Cart for request2   Return Cart

◀ Continue Shopping

1 Item(s) for a total of **10.49** USD
subtotal: 10.49 USD
estimated tax, shipping & handling: 0.00 USD

Name this cart: 2020-01-31 request2 01

(3) Click Proceed to Checkout

Proceed to Checkout   or   Assign Cart

Have you made changes? Update   🖨 | ⑦ Help   Add Non-Catalog Item   Empty Cart   Create New Cart   Perform an action on (0 items selected)... ▼   Select All ☐

amazon **AMAZON.COM** more info...

The item(s) in this group was retrieved from the supplier's website. What does this mean?
You can no longer access this item(s) on the supplier's website. What does this mean?
Line(s): 1

Product Description		Unit Price	Quantity	Total ☐
PILOT G2 Premium Refillable & Retractable Rolling Ball Gel Pens, Fine Point, Black Ink, 12 Count (31020)		10.49 EA	1	10.49 ☐
	Part Number B001GAOTSW			
	Manufacturer Info 31020 - (Pilot)	Update	Shipping	0.00 USD
	Commodity Code 44121700		Handling	0.00 USD
	Writing instruments			

Supplier subtotal   **10.49** USD

(4) The items at the top of the page show the minimum items that need to be corrected before the order can be placed.

❌ **Almost ready to go! The list below needs to be addressed before the request can be submitted.**   Place Requisition   Assign Cart
- Required field: Business Purpose
- Required field: Account
- Required field: Department
- Required field: Fund / Dept

Requisitions: 2881241
2020-01-31 request2 01

General		Document Actions ▼	History	🖨	?

Status: **Draft**
Document Total: **10.49** USD
What's next for my order?

Requisitions ⌄

General	✓
Shipping	✓
Billing	✓
Accounting Codes	✓
Internal Notes and Attachm...	✓

edit

Cart Name	2020-01-31 request2 01
Description	no value
Priority	Normal
Prepared by	Anna Leddige
Prepared for	request2
Hold Check	✗
Business Purpose	no value ❌ Required field ✏
Work Order Number	no value
Alternate Procurement Request	✗
IT Non-Standard	✗

(5) General Section: Click on 'Required field' by Business Process

(6) General Section:

Business Purpose – Enter a descriptive business purpose that can stand alone if an auditor was to review.

IT Non-Standard Tracking Number – if applicable, enter the Non-Standard IT tracking number for the form that was submitted to UIT for this purchase.

Alternate Procurement Request Number - if applicable, enter the alternate procurement request form number.

Work Order Number – If you have a need to track a word order, add that information. Most departments will not populate this field

Click Save

General	? X
Cart Name	2019-12-05 0478915 01
Description	
Priority	Normal
Prepared by	David Krause
Prepared for	David Krause
	Select a different user...
Business Purpose	copy paper
IT Non-Standard Tracking Number	
	Select from all values...
	⚠ Empty field
Software Name	
	⚠ Empty field
IT Non-Standard	☐
Alternate Procurement Request	
Supplier Order ID	
Work Order Number	

Save   Cancel

(7) Shipping Section:

Click on **Shipping** on the left hand side

If the user had a default shipping address under their profile, this shipping would be populated. Make sure the information is accurate. If not, click **Edit**.

Requisitions: 2881241
2020-01-31 request2 01

Status:	**Draft**
Document Total:	**10.49 USD**

What's next for my order?

Requisitions ⌄

General	✔
Shipping	✔
Billing	✔
Accounting Codes	✔
Internal Notes and Attachm...	✔
Notes/Attachments To Sup...	✔

Shipping   Document Actions ⌄ | History | 🖨 | ?

Ship To   edit

Shipping address   Attn: Anna Leddige
                                    409 Twamley Hall
                                    264 Centennial Drive
                                    Grand Forks, ND 58202-8356
                                    United States

Delivery Options   edit

Expedite   ✖
Ship Via   Best Carrier-Best Way
Requested Delivery Date   *no value*

Ship To   ? X

❌ No User Addresses

Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.

Shipping address   select from org addresses

Address Details

Attn: *	Anna Leddige
Address Line 1	409 Twamley Hall
Address Line 2	264 Centennial Drive
City	Grand Forks
State	ND
Zip Code	58202-8356
Country	United States

Save   Cancel

🦊 Mozilla Firefox

🛡 🔒 ⚏ https://usertest.sciquest.com/apps/Router/AddressSearchPopup?Addr

⊟ **Address Search**   ?

Nickname / Address Text   Duplicating

Search

(8) Shipping Section:

Click on **select from org address**

Enter the department or stop number you are looking for and click **Search**

Select the appropriate stop address

🦊 Mozilla Firefox   — ☐ ✕

🛡 🔒 ⚏ https://usertest.sciquest.com/apps/Router/AddressSearchPopup   ••• ⊙ ☆   ≡

Close

⊞ **Click to filter search results**   ?

| Results Per Page | 20 ⌄ | **Addresses Found: 1** | ◄ Page 1 of 1 ► ? |

Name	Address	
Duplicating Services	Attn: Anna Leddige 141 Facilities 3701 Campus Road Grand Forks, ND 58202-8008 United States	select

Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.

Shipping address   select from org addresses

Address Details

Attn: *	Anna Leddige
Address Line 1	141 Facilities
Address Line 2	3701 Campus Road
City	Grand Forks
State	ND
Zip Code	58202-8008
Country	United States

(9) Click **Save**

☐ Save this address for future use

Save   Cancel

TIP: If you would like to save the address for future requisitions, check **Save this address for future use**. This will allow the address to display in the dropdown.

Requisitions: 2881241
2020-01-31 request2 01

| Status: | Draft |
| Document Total: | 10.49 USD |
What's next for my order?

Requisitions ⌄

General	✔
Shipping	✔
Billing	✔
Accounting Codes	✔
Internal Notes and Attachm...	✔
Notes/Attachments To Sup...	✔

Shipping   Document Actions ⌄ | History | 🖨 | ?

Ship To   edit

Shipping address   Attn: Anna Leddige
                                          141 Facilities
                                          3701 Campus Road
                                          Grand Forks, ND 58202-8008
                                          United States

Delivery Options   edit

Expedite	✗
Ship Via	Best Carrier-Best Way
Requested Delivery Date	no value

TIP: For Rush orders, make contact with the supplier via phone so they are looking for the order.

(10) Delivery Options Section: If you would like to supply additional information for the delivery you will add it to this section. To change the section click **edit**.
Input the appropriate information and click **Save**.

Delivery Options   ? X

Expedite	☐
Ship Via	Best Carrier-Best Way ⌄
Requested Delivery Date	[____] 📅
	mm/dd/yyyy

Save   Cancel

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

Requisitions: 2881241
2020-01-31 request2 01

Status: Draft
Document Total: 10.49 USD
What's next for my order?

Requisitions ⌄
   General ✔
   Shipping ✔
   Billing ✔
   Accounting Codes ✔
   Internal Notes and Attachm... ✔
   Notes/Attachments To Sup... ✔
   Supplier Information ✔
   Taxes, Shipping & Handling

Billing　　　　　Document Actions ⌄ | History | 🖨 | ?

Bill To　　edit

Billing address

UND PAYMENT SERVICES
TWAMLEY HALL ROOM 409
264 CENTENNIAL DRIVE STOP 8356
GRAND FORKS, ND 58202-8356
United States

Billing Options　　edit

Accounting Date

No credit card has been assigned.　　edit

(11) Billing Section: The billing section will be handled by the payment method within PeopleSoft. **DO NOT** make any updates to this area.

(12) **Accounting Section**: The accounting section represents the chart fields that will be used for the purchase.
Click on **Accounting Codes** on the left hand side
Account Code: Click **required field** under Account to enter the information.

Requisitions: 2881241
2020-01-31 request2 01

Status: Draft
Document Total: 10.49 USD
What's next for my order?

Requisitions ⌄
   General ✔
   Shipping ✔
   Billing ✔
   Accounting Codes ✔

Accounting Codes　　Document Actions ⌄ | History | 🖨 | ?　　edit

Account	Department	Fund / Dept	Project	Program Code
no value ❌ Required field	no value ❌ Required field	no value ❌ Required field	no value	no value

⌄ **Lines**　　Selected Line Item Actions ⌄

AMAZON.COM
more info...

Unit

TIP: Header vs. Line level account codes

Header accounting codes are entered at the top of the page. These funding strings will allocate across every po line.
Line level accounting codes are entered at the specific PO line and override any header level accounting.

NOTE: Do not use header level account codes with the intention for the software to apply to a specific line. For example, major equipment typically should have specified accounting at the line level.

Accounting Codes

Account	Department
Select from all values... ⊗ Required field	Select from all values... ⊗ Required field

more info...

Mozilla Firefox

🛈 🔒 ⚏ https://usertest.sciquest.com/apps/Router/CFValueSearchPopup?CfId=106

⊟ **Custom Field Search** ?

Value [   ]

Description [office supplies]

[Search]

(13) **Account Number**: If you know the appropriate account number, enter the number. If not, click Select from all values. Enter the appropriate description and click **Search**
Click **Select** by the correct account number

[Close]

⊞ **Click to filter search results** ?

Results Per Page 20 ⌄	**Values Found 2**	◀ Page 1 of 1 ▶ ?

Value ▲	Description △	
536015	Office Supplies	select
536030	Recharge - Office Supplies	select

Accounting Codes

Account	Department	Fund / Dept
536015 Select from all values... ❌ Required field	Select from all values... ❌ Required field	❌ Required field

Save   Cancel

more info...

Mozilla Firefox

🔒 https://usertest.sciquest.com/apps/Router/CFValueSearchPopup?CfId=

⊟ **Custom Field Search** ?

| Value | |
| Description | Duplicating |

Search

(14) **Department Number**: If you know the appropriate Department number, enter the number. If not, click Select from all values.
Enter the appropriate description and click **Search**

Close

⊞ **Click to filter search results** ?

| Results Per Page | 20 ⌄ | **Values Found 1** | ◀ Page 1 of 1 ▶ ? |

Value ▲	**Description** △	
3300	Duplicating Services	select

Accounting Codes ? X

Account	Department	Fund / Dept	Project	Program Code	add split
536015 Select from all values... ❌ Required field	3300 Select from all values... ❌ Required field	Select from all values... ❌ Required field		Select from all values...	

recalculate / validate

Save   Cancel

(15) **Fund/Department**: If you know the appropriate Fund/Department number, enter the number. If not, click **recalculate /validate** then **Select from all values**.
Choose the appropriate Fund/Dept from the dropdown

TIP: You must enter a fund department combo.

Accounting Codes ? X

Account	Department	Fund / Dept	Project	Program Code	add split
536015 Select from all values... ❌ Required field	3300 Select from all values... ❌ Required field	Hide all values...		Select from all values...	

22436-3300 – Duplicating
22440-3300 – Copier Management Program
22476-3300 – Color Copier (04)
22490-3300 – Copier Equipment Replacement

recalculate / validate

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

Accounting Codes

Account	Department	Fund / Dept	Project	Program Code	add split
536015	1120	41000-1120			
Select from all values...	Select from all values...	Select from all values...	Select from all values...	Select from all values...	
⊗ Required field	⊗ Required field	⊗ Required field			

recalculate / validate

Mozilla Firefox

🔒 https://usertest.sciquest.com/apps/Router/CFValueSearchPopup

Close

⊞ Click to filter search results

Results Per Page [20 ▾]   **Values Found 95**   ◀ Page [1 ▾] of 5 ▶

Value ▲	Description △	
UND0020181	SGC Energia - Consulting	select
UND0020691	DOE-FERR-6- Mgmt & Rptg-UG	select
UND0021310	DOE-PCRO3-BP5-T13-Mgmt&Rep	select

more info...

Product Description		ty	Ext. Price
1	PILOT G2 Premium Re Black Ink, 12 Count (3		10.49 USD ☐
	Accounting Codes (same		edit

(16) **Project**: If there is a Project & you know the appropriate project number, enter the number. If not, click **recalculate /validate** then **Select from all values**.
Choose the appropriate Project and click **select**

Accounting Codes

Account	Department	Fund / Dept	Project	Program Code	add split
536015	1120	41000-1120	UND0020181		
Select from all values...	Select from all values...	Select from all values...	Select from all values...	Select from all values...	
⊗ Required field	⊗ Required field	⊗ Required field			

recalculate / validate

Mozilla Firefox

🔒 https://usertest.sciquest.com/apps/Router/CFValueSearchPopup

Close

⊞ Click to filter search results

Results Per Page [20 ▾]   **Values Found 2508**   ◀ Page [1 ▾] of 126 ▶

Value ▲	Description △	
00003	05-32-4542 T&L 900: Building	select
00004	Inspector Management Planner	select
00005	DESIGN REFRESHER	select

more info...

Product Description		ty	Ext. Price
1	PILOT G2 Premium Re Black Ink, 12 Count (3		10.49 USD ☐
	Accounting Codes (same		edit

(17) **Program Code**: If there is a Program Code & you know the appropriate number, enter the number. If not, click **recalculate /validate** then **Select from all values**.
Choose the appropriate Program code and click **select**

Accounting Codes

Account	Department	Fund / Dept	Project	Program Code	% of Price	add split
536015	1120	41000-1120	UND0020181	00010	0	remove
Select from all values...	Select from all values...	Select from all values...	Select from all values...	Select from all values...		
⊗ Required field	⊗ Required field	⊗ Required field				
536015	1120	41000-1120	UND0020181	00010	0	remove
Select from all values...	Select from all values...	Select from all values...	Select from all values...	Select from all values...		

Split Total 0%

add split

recalculate / validate   show monetary calculations

Save   Cancel

(18) **Split**: If there is multiple funding sources, click add split and enter the additional funding.
Choose appropriate Split Type
% of Price
Amount of Price
Click Save

Requisitions: 2881241
2020-01-31 request2 01

Status: Draft
Document Total: 10.49 USD
What's next for my order?

Requisitions ⌄

General	✓
Shipping	✓
Billing	✓
Accounting Codes	✓
Internal Notes and Attachm...	✓
Notes/Attachments To Sup...	✓
Supplier Information	✓
Taxes, Shipping & Handling	

Accounting Codes

Document Actions ▾ | History | 🖨 | ?

Account	Department	Fund / Dept	Project	Program Code	edit
536015 Office Supplies	3300 Duplicating Services	22436-3300 Duplicating	*no value*	*no value*	

⌄ Lines   Selected Line Item Actions ▾

AMAZON.COM
more info...

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	☐
1	PILOT G2 Premium Refillable & Retractable Rolling Ball Gel Pens, Fine Point, Black Ink, 12 Count (31020) ⟡ more info...	B001GAOTSW	EA	10.49	1 EA	10.49 USD	☐
	Accounting Codes (same as header)					edit	

> TIP: The funding entered at the header level will flow down to each item on the order. If you have an item that need specific funding you can adjust it at the line level by choosing edit on that line.

Requisitions: 2881241
2020-01-31 request2 01

Status: Draft
Document Total: 10.49 USD
What's next for my order?

Requisitions ⌄

General	✓
Shipping	✓
Billing	✓
Accounting Codes	✓
Internal Notes and Attac...	✓

Internal Notes and Attachments

Document Actions ▾ | History | 🖨 | ?

Internal Note   edit
Internal Attachments
[Add Attachments]   **Date**

⌄ Lines   Line Item Actions ▾

AMAZO...
more inf...

Pro...   Ext. Price ☐

> (19) Internal Notes and Attachments: this area will be to input comments or attachments for UND employees ONLY. These do not get sent to the Supplier.
> Click on **Internal Notes and Attachments** on the left hand side
> Click on edit
> Add the note and **Save.**

Internal Note   ? X

Internal Note

Please call me regarding this order

96? characters remaining   expand | clear

[Save] [Cancel]

Status: **Draft**
Document Total: **10.49 USD**
What's next for my order?

Note to all Suppliers   no note
Attachments for all suppliers

Add Attachments

edit

Requisitions ⌄

General   ✔
Shipping   ✔
Billing   ✔
Accounting Codes   ✔
Internal Notes and Attachm... ✔
Notes/Attachments To Su... ✔

⌄ **Lines**   Selected Line/Item Actions ▾

AMAZON.COM
more info.

Proc...   xt. Price ☐

1 PILC...   .49 USD   ☐

(20) Notes/Attachments to Suppliers: this area will be comments or attachments for the SUPPLIER. These will get sent to the Supplier.
Click on **Notes/Attachments to Supplier** on the left hand side
Click on **edit**
Add the note and **Save.**

External Info   ? X

Note to all Suppliers   Per our discussion on Quote 123|

                               969 characters remaining   expand | clear

                               Save   Cancel

Product Description   Catalog No.   Size /   Unit   Quantity   Ext. Price   ☐

(21) Final Review: Line Section
Click on **Final Review** on the left hand side
Review the information and click **edit** if any updates are necessary

Requisitions: 2881241
2020-01-31 request2 01

Status:	**Draft**
Document Total:	**10.49 USD**
What's next for my order?	

Requisitions ∨

General	✔
Shipping	✔
Billing	✔
Accounting Codes	✔
Internal Notes and Attachm...	✔
Notes/Attachments To Sup...	✔
Supplier Information	✔
Taxes, Shipping & Handling	
Final Review	✔

∨ **Lines**

AMAZON.COM   more info...

TIP: If the item you are ordering came from a catalog, do not make a change in this area. Go back to the catalog to reselect the item and start that process over.

Account Code	*no value*
Pricing Code	*no value*
Quote number	*no value*

View/edit by line item...

The item(s) in this group was retrieved from the supplier's website. What does this mean?
You can no longer access this item(s) on the supplier's website. What does this mean?
Line(s): 1

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	☐	
1	**PILOT G2 Premium Refillable & Retractable Rolling Ball Gel Pens, Fine Point, Black Ink, 12 Count (31020)** ⊹ more info...	B001GAOTSW	EA	10.49	1 EA	10.49 USD	☐	edit

Manufacturer Name	Pilot	Commodity Code	44121700	Internal Note	*no note*	
Manufacturer Part Number	31020		Writing instruments	Internal Attachments		
Supplier Part Auxiliary ID	140-4987536-3902350,1			Add Attachments		
more info...				External Note	*no note*	
				Attachments for supplier		
				Add Attachments		

Supplier subtotal	10.49
Shipping	0.00
Handling	0.00
Supplier total	**10.49 USD**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	10.49
Shipping	0.00
Handling	0.00
Total	**10.49 USD**

(22) Place Requisition: If you have 'This order is ready to be placed' in green on top of the requisition, click Place Requisition.

This order is ready to be placed.   Place Requisition | Assign Cart

Requisitions: 2881241
2020-01-31 request2 01

Status: Draft
Document Total: 10.49 USD
What's next for my order?

Requisitions ⌄

General	✔
Shipping	✔
Billing	✔
Accounting Codes	✔
Internal Notes and Attachm...	✔
Notes/Attachments To Sup...	✔
Supplier Information	✔
Taxes, Shipping & Handling	
Final Review	✔

PR Approvals

Comments   ❶

Attachment Overview

PO Preview

Accounting Codes   Document Actions ⌄ | History | 🖶 | ?

Account	Department	Fund / Dept	Project	Program Code	edit
536015 Office Supplies	3130 Procurement & Payment Services	22116-3130 Accounts Payable	*no value*	*no value*	

⌄ **Lines**   Selected Line Item Actions ⌄

AMAZON.COM

more info...

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	☐
1	PILOT G2 Premium Refillable & Retractable Rolling Ball Gel Pens, Fine Point, Black Ink, 12 Count (31020) ⟡ more info...	B001GAOTSW	EA	10.49	1 EA	10.49 USD	☐

Accounting Codes (same as header)

                                                                          edit

	Supplier subtotal	10.49
	Shipping	0.00
	Handling	0.00
	Supplier total	10.49 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

	Subtotal	10.49
	Shipping	0.00
	Handling	0.00
	Total	**10.49 USD**

Shop ▸ My Carts and Orders ▸ Open My Active Shopping Cart ▸ Submitted - Requisition 2881241

✓ **Requisition Submitted**

Next Steps
You can view or print this at: Requisition 2881241, or via the Document Search page

- View Approval Status
- Search for another item
- View order history
- Check the status of an order
- Return to your home page
- Create new draft cart

(23) View Approval: Click View Approval Status to verify the order passed budget check

Requisition Summary

Requisition number	2881241 Quick View
Requisition status	Pending
Cart name	2020-01-31 request2 01
Requisition date	2/3/2020
Requisition total	10.49 USD
Number of line items	1

Requisitions: 2881241
2020-01-31 request2 01

Status:	**Pending**
Document Total:	10.49 USD

Requisitions ›

PR Approvals

Comments   1

Attachment Overview

PO Preview

PR Approvals

Show skipped steps ☐

Orientation [Horizontal ▾]

➡️ Submitted
Anna Leddige
On behalf of: request2
2/3/2020 8:42 AM

Budget Check 1
Completed ✓

Budget Check 1 Response
Approved ✓

Department Approval
Active ↻
View approvers

Budget Check 2
Future ➡️
Expedite

Budget Check 2 Response
Future ➡️
View approvers
Expedite

📄 **Create PO**
Future ➡️
Expedite

🏁 Finish
Expedite

> (24) Budget Check review: Look at the Budget Check 1 Response and verify it shows Approved. If it does not click the history button to determine the error.

Requisitions: 2881241
2020-01-31 request2 01

Status:	**Pending**
Document Total:	10.49 USD

Requisitions ›

PR Approvals

Comments   1

Attachment Overview

PO Preview

PR Approvals

Document Actions ▾ | History | 🖨 | ?

Show skipped steps ☐

Orientation [Horizontal ▾]

➡️ Submitted
Anna Leddige
On behalf of: request2
2/3/2020 8:42 AM

Budget Check 1
Completed ✓

Budget Check 1 Response
Approved ✓

Department Ap...
Active ↻
View appro...

History - Requisition 2881241 - Mozilla Firefox

🔒 https://usertest.sciquest.com/apps/Router/ReqAuditTrail?ReqId=2881241&ViewContentC

⊞ Click to filter history   ?   Export CSV

Results Per Page [20 ▾]   **Records found: 18**   ◀ Page 1 of 1 ▶ ?

Line No △	Date/Time ▾	User △	Step(s)	Action △	Field Name △	From	To	Note
	2/3/2020 8:42 AM	System	Budget Check 1 Response	Requisition budget check passed				Requisition 2881241
	2/3/2020 8:42 AM	System	Budget Check 1	Message transmission to external system was successful.				
	2/3/2020 8:42 AM	Anna Leddige	Requisition modified		Accounting Date	empty	2/3/2020	
	2/3/2020	Anna	Requisition					

> TIP: To determine who will approve the order, click View Approvers under each approval workflow step.

Requisitions: 2881241
2020-01-31 request2 01

Status:	**Pending**
Document Total:	10.49 USD

Requisitions ›

PR Approvals

Comments   1

Attachment Overview

PO Preview

PR Approvals

Document Actions ▾ | History | 🖨 | ?

Show skipped steps ☐

Orientation [Horizontal ▾]

➡️ Submitted
Anna Leddige
On behalf of: request2
2/3/2020 8:42 AM

Budget Check 1
Completed ✓

Budget Check 1 Response
Approved ✓

Department Approval
Active ↻
View approvers

Budget Check 2
Future ➡️
Expedite

Budget Check 2 Response
Future ➡️
View approvers
Expedite

📄 **Create PO**
Future ➡️
Expedite

🏁 Finish
Expedite

Workflow Step Approvers (Department Approval) ? X
Approver Group : Department Approval - 3130
Jana K Thompson   jana.k.thompson@ndus.edu
Close

Assigning a Substitute Requestor

If a requestor will be out of the office and unable to complete this role. They have the ability to assign a substitute requestor from those individuals with the requestor role.

(1) Click on the C**art** on the left hand side
Select **My Carts and Orders**
Select **View Carts**

Shop ▶ My Carts and Orders ▶ View Carts ▶ Assigned Carts ▶ Assigned Carts

Shop (Alt+P)

Open My Active Shopping Cart

Shopping

View Carts

My Carts and Orders   ▶

View My Orders (Last 90 Days)

Admin

Shopping Settings

Shop ▶ My Carts and Orders ▶ View Carts ▶ Assigned Carts ▶ Assigned Carts

Cart Management

(2) **Click Assign Substitute**

Draft Carts 🛒   Assigned Carts

Create Consolidated Cart   Create Cart

Assign Substitute

> Filter Assigned Carts

Type ⌃	Cart Number ⌃	Shopping Cart Name ⌃	Cart Description	Date Created ▲	Total ⌃	Created By ⌃	Assigned To ⌃	Action
Normal	2870571	**Dining Spoons**		1/21/2020	199.40 USD	request2	Anna Leddige	View ▼
Normal	2881241	**2020-01-31 request2 01**		1/31/2020	10.49 USD	request2	Anna Leddige	View ▼

User Search

Last Name ❓ Krause

First Name ❓

User Name ❓

Email ❓

Role ❓

Results Per Page 10

Search

(3) Input the requestor that will be handling the orders and click **Search** Click **Select**

New Search

Name ▲	User Name △	Email △	Phone	Action
Krause, David	0478915	david.krause@ndus.edu		[select]

Cart Management

Draft Carts   Assigned Carts 🛒

Current Substitute: David Krause   End Substitution

(4) When the original requestor returns, click **End Substitution**

Approving a Requisition

The requestor can access the assigned cart through an e-mail notification which takes you into Jaggaer, through the Jaggaer home page or can approve directly through the email with an approval code.

Department Approval - 3130 Approval Request for Requisition# 2881241

Dear Jana K Thompson,

The requisition listed below has been submitted for your approval.
WARNING: Your approval code is not set up in your profile, so you are not allowed to take action on this requisition via email. Action must be taken in your organization's site. You may log into the application to set the approval code in your user profile.

Summary

Folder:	Department Approval - 3130
Prepared by:	Anna Leddige
Prepared for:	
Cart Name:	2020-01-31 request2 01
Requisition No.:	2881241
Priority:	Normal
No. of line items:	1

TOTAL: 10.49 USD

Details

AMAZON.COM

Item 1
Description:	PILOT G2 Premium Refillable & Retractable Rolling Ball Gel Pens, Fine Point, Black Ink, 12 Count (31020)
Catalog Number:	B001GAOTSW
Quantity:	1
Unit Price:	10.49 USD
Ext. Price:	10.49 USD
Size/Packaging:	EA
Commodity Code:	44121700

TOTAL: 10.49 USD

Accounting Codes

Account::	536015 : Office Supplies
Department::	3130 : Procurement & Payment Services
Fund / Dept::	22116-3130 : Accounts Payable
Project::	—
Program Code::	—

Ready to approve, reject or assign this document to yourself?   **Take Action**

Additional Information

Summary Details
Hold Check:	No
Business Purpose:	Pen replacement
Work Order Number:	
Alternate Procurement Request:	No
IT Non-Standard:	No
Comments:	(1)

Shipping Address
Attn: Anna Leddige
141 Facilities
3701 Campus Road
Grand Forks, ND 58202-8008
United States

(1A) Click View Requisition Approvals to review the information within Jaggaer.

View Requisition Approvals

If you have any questions with regard to reviewing/approving this requisition, please contact your SelectSite Support Team.

Support Team Contact Information:
+1 701-777-2771
UND.PPS@UND.edu

Ready to approve, reject or assign this document to yourself? `Take Action`

> **Shipping**

> **Billing**

> **Accounting Codes**

> **Internal Notes and Attachments**

> **Notes/Attachments To Supplier**

> **Line Items**

> **Other Approvers** `1`

(1B) Review the information for the order,
Click **Take Action** within the email to approver via the email.
Enter you **Approval Code** and **Click Approve**

Actions

Approval Code *

`Required`

Comment

👤 Assign to myself

✓ Approve

Jana K Thompson

User Name   0271774

TIP: To setup your approval code, click the silhouette icon, then View My Profile, click the dropdown by Update Security Settings and choose **Change Email Approval Code** Enter your code and click **Save Changes**

User Profile and Preferences ❯

Update Security Settings ⌄

   Change Password

   Change Email Approval Code

   Change Security Question or Answer

Change Email Approval Code ✕

Email Approval Code   [   ]

Save Changes   Close

Search (Alt+Q) 🔍 🛒 100.00 USD ❤ |🚩 🔔 👤

Action Items

Unassigned Approvals

Requisitions ← **2**

Invoices **16**

Change Request **1**

> **(1C)** From the Home Page, Click the flag icon and select Action Items, Requisitions under Unassigned Approvals

▲ 📁 **Department Approval - 3130 [2 results]**

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action	☐
♻ 2881241 📑	AMAZON.COM	Not Assigned	2/3/2020 8:42 AM	request2	10.49 USD	Assign	☐
Requisition Name No. of line items This PR has notes	2020-01-31 request2 01 1 ✓		📁 Folders 0 Days in folder [Department Approval - 3130]				
♻ 2879765 📑	McMaster Carr	Not Assigned	1/30/2020 12:41 PM	Anna Leddige	1,222.36 USD	Assign	☐
Requisition Name	2020-01-30 0309796 03		📁 Folders 3 Days in folder [Department Approval - 3130]				

> **(2)** Click on the Requisition Number to open the order for review

‹ Back to Approvals   1 of 2 Results ▾ ‹ › Folder: Department Approval - 3130

Requisitions: 2881241
2020-01-31 request2 01

Status: **Pending**
Document Total: **10.49 USD**

Requisitions ▾

Summary
General
Shipping
Billing
Accounting Codes
Internal Notes and Attachm...
Notes/Attachments To Sup...
Supplier Information
Taxes, Shipping & Handling

PR Approvals

Comments ①

Attachment Overview

PO Preview

Summary   Document Actions ▾ | History | 🖨 | ?

> | Assign to myself
> | Approve/complete step & show next
> | Approve/complete step
> | Copy to New Cart
> | Add Comment
> | Add Notes to History
> | Add Non-Catalog Item

▾ **General**

Status	♻ Pending Department Approval
Submitted	2/3/2020 8:42 AM
Cart Name	2020-01-31 request2 01
Description	*no value*
Priority	Normal
Prepared by	Anna Leddige
Prepared for	request2
Hold Check	✗
Business Purpose	Pen replacement
Work Order Number	*no value*
Alternate Procurement Request	✗
IT Non-Standard	✗

> **(3)** Review the details of the order and make appropriate changes if necessary.
> When the order is ready to be approved, select the drop down by Document Actions and Choose 'Approve/complete step'

▾ **Shipping**

Ship To

Attn: Anna Leddige
141 Facilities
3701 Campus Road
Grand Forks, ND 58202-8008
United States

Assigning a Substitute Approver

If you will be out of the office, you can setup a substitute approver to cover in your absence. This individual will need to have the approver role and can't be a requestor.

(1) Click orders in the left hand column
Choose **Approvals**
Choose **Assign Substitute Approvers-Requisitions.**

(2) Options: Click **Assign Substitute to All Requisition Folders,** or
Click **Assig**n on the individual departments, or click multiple boxes, then click **Substitution Actions** and **Assign Substitution to Selected Folders**

Assign Substitute

☒ Include Date Range for Substitution

Substitute Name ★   Leddige, Anna   ✕ 🔍

Start Date ★   03/03/2020 12:00 AM   📅 🕐
mm/dd/yyyy hh:mm a

End Date ★   03/07/2020 12:00 AM   📅 🕐
mm/dd/yyyy hh:mm a

★ Required   Assign   Close

(3) Enter the appropriate Substitute name.
If you want to add a date range check the box for include Date Rage for Substitution and enter that information then click Assign.

Assign Substitute to All Requisitions Folders   End Substitute for All Requisitions Folders

Showing **1 - 4** of 4 Results   **All Folder Results**   Substitution Actions ▼

Results Per Page 20 ▾   Sort by: Folder name ascending ▾   ◀ Page 1 of 1 ▶ ?

Folder Name	Approver	Substitute	Action	☐
Assigned PR Approvals	Jana K Thompson		Assign	☐
Department Approval - 3130	Jana K Thompson	*Anna Leddige* *Start Date: 03/03/2020 12:00 AM* ➡ *End Date: 03/06/2020 12:00 AM*	Remove	☐
Department Approval - 3205	Jana K Thompson		Assign	☐
Procurement Approvers - Jana	Jana K Thompson		Assign	☐

(4) If you have not entered a date range, you will need to go back and remove the substitution when you return. Click Remove.

Purchase Order Change Order

> **TIP:** Change orders should be used for funding changes, pricing updates and reduction in quantity. However change orders can't be used for a pricing or quantity change for catalog purchases.
>
> Best practice is to create a new Purchase Order for additional quantity or new items.

(1) Find the Purchase Order needing to be changed by utilizing the Searching for Carts, Order and Documents step.

(2) Click on **Document Actions** dropdown Click on **Create Change Order Request**

Orders ▸ Search ▸ Search Documents ▸ Status - PO J000000679

‹ Back to Results   27 of 441 Results ▾   ‹ ›

Purchase Order:
J000000679 Revision 0
3047301

Supplier:	SANTA CRUZ BIOT...
Status:	Completed
Document Total	289.00 USD
View Related Documents	

Status

Purchase Order ›

Revisions

PO Approvals

Shipments

Change Requests

Receipts

Invoices

Comments

Attachment Overview

Status

Document Actions ▾ History 🖨 ?

Add Comment   pse All
Create Change Request
Add Notes to History
Create Quantity Receipt
Create Cost Receipt
Print Fax Version
Soft Close PO
Close PO

General Information

PO/Reference No.	J000000679
Revision No.	0
Supplier Name	SANTA CRUZ BIOTECHNOLOGY INC more info...
Purchase Order Date	1/22/2020
Total	289.00
Owner Name	David Krause
Owner Phone	
Owner Email	david.krause@ndus.edu
Requisition Number	2870388 view	print

Document Status   ▮

A/P status	Open
Workflow	✓ Completed (1/22/2020 12:50 PM)
Distribution	The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view
	Fax: +1 919-659-6100
	Email (HTML Body): customerservice@scbt.com
	Manual
Distribution Date/Time	1/22/2020 12:50 PM
Supplier	Sent To Supplier view

Lines

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
	Non-Standard Purchase Form 📄 more info...									
1 ✓	cGAS	ewtqwt		289.00	1	289.00 USD	Sent To Supplier	none	none	No Matches
	Procurement Request: Non-Standard Purchase Form									

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	289.00
Shipping	0.00
Handling	0.00
Total	289.00 **USD**

Create Change Request

This will create a change request for this purchase order. If you select
receive an email indicating that a change request has been created fo
order.

Email notification(s):
- ☑ Anna Leddige <anna.leddige@ndus.edu>
- ☐ David Krause (Prepared by, Prepared for)
  <david.krause@ndus.edu>

add email recipient...

User with change request permission:
- ☐ Abby Admin (Approved) <chris.dott@risenow.com>
- ☐ David Krause (Approved) <david.krause@ndus.edu>
- ☐ Jana K Thompson (Approved) <jana.k.thompson@ndus.edu>
- ☐ Louis Christoffer (Approved) <louis.christoffer@ndus.edu>
- ☐ Tonya Parton (Approved) <tonya.parton@ndus.edu>

add email recipient...

🦊 User Search - Mozilla Firefox

🛡 🔒 ⚏ https://usertest.sciquest.com/apps/Router/GenericUs

User Search

Last Name ⓘ	Parton
First Name ⓘ	Tonya
User Name ⓘ	
Email ⓘ	
Role ⓘ	▾
Results Per Page	10 ▾

Search

(3) If you need to notify ad individual of the change, select the correct person.
If the individuals is not listed, click add email recipients.
Enter the name and click search and Select.

Name ▲	User Name △	Email △	Phone	Action
Parton, Tonya	0399535	tonya.parton@ndus.edu		[select]

Orders ▸ Search ▸ Search Documents ▸ Summary - 2887303 - Change Request

This change request is ready to be submitted.   Submit Request Assign Draft

Change Requests:
2887303
2020-01-21 0478915 01 - CR(1)

| Status: | Draft |
| Document Total: | 289.00 USD |

View Related Documents
What's next for my order?

Change Requests ∨

Summary

Summary   Document Actions ▾ History 🖨 ?
                                                    Expand All | Collapse All

External Communication Options

Resend to Suppliers on   false
Change Request ⓘ

Resend to ERP System   true
Connections on Change
Request ⓘ

48

Create Change Request

×

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s):

☑ Anna Leddige <anna.leddige@ndus.edu>
☐ David Krause (Prepared by, Prepared for) <david.krause@ndus.edu>
☐ request2 <anna.leddige@ndus.edu>
☑ Tonya Parton <tonya.parton@ndus.edu>
add email recipient...

User with change request permission:

☐ Jana [ndus.edu]
☐ requ [und.edu]   **TIP: Disregard this notification area**
☐ requ [s.edu]
☐ requ [s.edu]
☐ requ [edu]
add email recipient...

Changing funding

> (4) Enter the reason for the change order. If applicable add an attachment
> Click **Create Change Request**

984 characters remaining

Attach file to this change request (optional):

Attachment Type   File ▾
File Name   [   ]
File   Browse...   No file selected.

Create Change Request   Close

49

Accounting Codes

Account	Department	Fund / Dept	Project	Program Code	edit
532120 Research Supplies/Materials	8015 Biomedical Sciences	20464-8015 Nilles Research	no value	no value	

(5) If the funding is changing for the entire order, select **edit** at the header level.
If the change is only for one line item on the purchase order, select **edit** at the line level.

Lines

Hide Line Details | Selected Line Item Actions ▼

SANTA CRUZ BIOTECHNOLOGY INC more info...
SUA
10410 FINNELL ST, DALLAS, TX 75220-2443 USA

Contract	no value
PO Number	J000000679
Account Code	no value
Pricing Code	no value
Quote number	no value

	Product Description			Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	☐
	Non-Standard Purchase Form more info...								☐
1	cGAS Procurement Request: Non-Standard Purchase Form			ewtqwt		289.00	1	289.00 USD	edit
	Select one of the following: more info...	Purchase is under $10k	Commodity Code	85121800 Medical laboratories	Internal Note no note				

Internal Attachments
Add Attachments

External Note   no note
Attachments for supplier
Add Attachments

Accounting Codes   ? X

Account	Department	Fund / Dept	Project	Program Code	add split
532120 Select from all values...	3130 Select from all values...	22116-3130 Select from all values...		Select from all values...	

recalculate / validate

Save   Cancel

(6) Update the appropriate Funding and select **Save**

Change Requests · 3412446 ▾

Summary   Taxes/S&H   PO Preview   **External Communication**   Comments ①   Attachments   History

Resend to...   ⌄

✓   Suppliers on Change Request

✓   ERP System Connections on Change Request

    ✓   PO Export to RMM

    ✓   PO Expt to NDUS PeopleSoft

(7) Click **External Communication**
Then check the box called "Suppliers on Change Request" to send the change order to the supplier otherwise leave unchecked.

(8) Click **Submit Request** on the top of the page.

Orders ▸ Search ▸ Search Documents ▸ Summary - 2887303 - Change Request

This change request is ready to be submitted.   Submit Request   Assign Draft

Change Requests:
2887303
2020-01-21 0478915 01 - CR(1)

Summary   Document Actions ▾ History 🖨 ?
                                                 Expand All Collapse All

Status: Draft
Document Total: 289.00 USD   **External Communication Options**
View Related Documents
What's next for my order?   Resend to Suppliers on   false
                                 Change Request ⓘ

Change Requests ⌄   Resend to ERP System   true
                                 Connections on Change
  Summary   Request ⓘ

Shop ▸ My Carts and Orders ▸ Open My Active Shopping Cart ▸ Submitted - Change Request

✅ **Change Request Submitted**

Next Steps
You can view or print this at: Change Request 2887303

• View Approval Status
• Search for another item
• View order history
• Check the status of an order
• Return to your home page
• Create new draft cart

(8) Click **View Approval Status** to see the approval workflow that the change order will go through. It mirrors the requisition workflow.

51

Change Requests: 2887303

2020-01-21 0478915 01 - CR(1)

Status: Pending
Document Total: 289.00 USD
View Related Documents

Change Requests ▸

Change Request Approvals

Comments   1

Attachment Overview

PO Preview

Change Request Approvals

Document Actions ▾ | History | 🖨 | ?

Submitted
request2
On behalf of:
David Krause
2/7/2020
2:11 PM

Budget Check 1
Completed ✓

Department Approval
Active ⟳
View approvers

Procurement Review
Future ➡
View approvers

Budget Check 2
Future ➡

🗎 **Create PO**
Future ➡

Finish

Budget Check 1 Response
Approved ✓

Budget Check 2 Response
Future ➡
View approvers

(9) Check to make sure the Budget Check 1 Response status is approved. If not, check the history to determine why it failed budget check.

Submitted
request2
On behalf of:
David Krause
2/7/2020
2:11 PM

Budget Check 1

Department Approval
View approvers

Procurement Review

Budget Check 2

🗎 **Create PO**

Closing a Purchase Order

If you will not be fulfilling the entire Purchase Order, you can close it to unencumber funds.

(1) Find the Purchase Order needing to be changed by utilizing the Searching for Carts, Order and Documents step.

(2) Select Close PO

‹ Back to Results   1 of 2 Results ▾ ‹ ›

Purchase Order:
J000000609 Revision 0
3040525

Supplier:	DELL MARKETING LP
Status:	Completed
Document Total:	479.99 USD

View Related Documents

Status

Purchase Order ›

Revisions

PO Approvals

Shipments

Change Requests

Receipts

Invoices

Comments ①

Attachment Overview

Status

Document Actions ▾ | History | 🖨 | ?

...pse All

Add Comment
Create Change Request
Add Notes to History
Create Quantity Receipt
Create Cost Receipt
Print Fax Version
Soft Close PO
Close PO

General Information

PO/Reference No.	J000000609
Revision No.	0
Supplier Name	DELL MARKETING LP more info...
Purchase Order Date	1/3/2020
Total	479.99
Owner Name	Anna Leddige
Owner Phone	
Owner Email	anna.leddige@ndus.edu
Requisition Number	2861151 view	print

Document Status

A/P status	Open
Workflow	✓ Completed (1/3/2020 9:16 AM)
Distribution	The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view
	cXML (Electronic Integration)
Distribution Date/Time	1/9/2020 9:39 AM
Supplier	Sent To Supplier view

Lines

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 ✓	OptiPlex 3070 Micro;OptiPlex 3070 Micro BTX ↔ more info...	210-ASBI	EA	479.99	1 EA	479.99 USD	Sent To Supplier	none	none	No Matches

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	479.99
Shipping	0.00
Handling	0.00
Total	**479.99 USD**

Add Note   ✕

Specify the reason for changing the A/P status to closed.

Will no longer be receiving this purchases|

958 characters remaining
Maximum allowed characters are 1000

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

OK   Close

(3) Enter the reason for closing the PO and select **OK**

**Purchase Order:
J000000609 Revision 1
(Closed)**
3040525

Supplier:	DELL MARKETING LP
Status:	Completed
Document Total:	479.99 USD

View Related Documents

Status

Purchase Order ›

Revisions

PO Approvals

Shipments

Change Requests

Receipts

Invoices

Comments ②

Attachment Overview

Status   Document Actions ▾ | History 🖶 | ?

Expand All | Collapse All

▾ General Information

PO/Reference No.	J000000609
Revision No.	1
Supplier Name	DELL MARKETING LP more info...
Purchase Order Date	1/3/2020
Total	479.99
Owner Name	Anna Leddige
Owner Phone	
Owner Email	anna.leddige@ndus.edu
Requisition Number	2861151 view	print

(4) Note that the A/P Status has been updated to Closed

▾ Document Status

A/P status	Closed
Workflow	✓ Completed (1/3/2020 9:16 AM)
Distribution	The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view
	cXML (Electronic Integration)
Distribution Date/Time	1/9/2020 9:39 AM
Supplier	Sent To Supplier view

▾ Lines

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 ✓	OptiPlex 3070 Micro;OptiPlex 3070 Micro BTX ⬧ more info...	210-ASBI	EA	479.99	1 EA	479.99 USD	Sent To Supplier	none	none	No Matches

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	479.99
Shipping	0.00
Handling	0.00
Total	479.99 USD

Receiving a Good & Services

Receiving can be completed on a purchase order. You can find the purchase order through a quick search or document search.

(1A) Enter the PO number, at the top to locate available purchase orders.
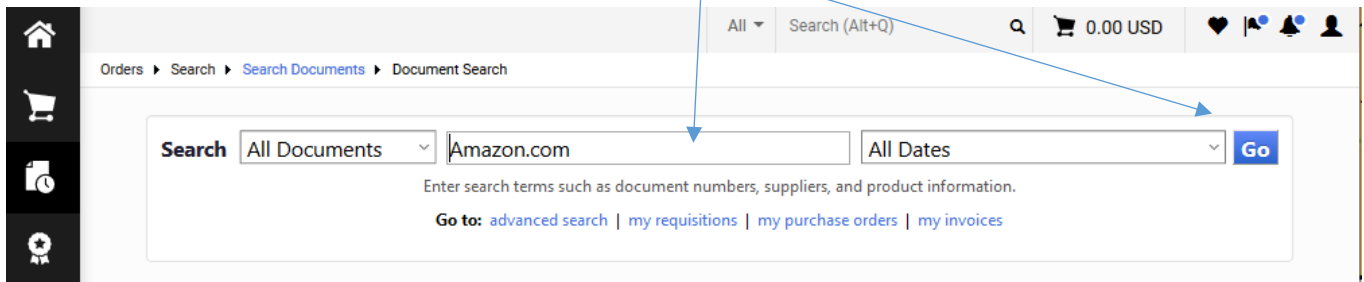
(1B) If you do not know the PO number, you can search by the supplier or requisition number.
Choose Orders on left side, select Search, Search documents.
Enter the supplier name and select go
Choose the appropriate Purchase Order by clicking on the Document Number.

Document Number	Document Type	Document Owner	Document Date/Time	Supplier	Document Total
✓ J000000718	Purchase Orders	request2	2/3/2020 11:27 AM	AMAZON.COM	10.49 USD
✓ 2881241	Requisitions	request2	2/3/2020 8:42 AM	AMAZON.COM	10.49 USD

Quantity Receipt

Quantity receipts are used to receipt commodities

Orders ▸ Search ▸ Receipts ▸ Summary - Receipt To Be Assigned

Summary Comments (0) History

?

Exact Match: PO No. J000000718

⊟ **Header Information**   ?

| Receipt Name | 2020-02-03 0309796 01 |

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	2/3/2020 mm/dd/yyyy	1234	**AMAZON.COM**	Anna Leddige

RECEIPT ADDRESS   **DELIVERY**

⚠ No addresses defined in profile.

Carrier

Attn: Anna Leddige   Tracking No.
141 Facilities
3701 Campus Road   Attachments   **Attach/Link**
Grand Forks, ND 58202-8008
United States   Notes
                                       (1,000 Chars. Max)

Other ⌄

Receipt Lines   ?

Line Details

?

Hide Receipt Details   For Selected Lines: Remove Selected Items ⌄ **Go**

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions	☐
J000000718 🖶	1	PILOT G2 Premium Refillable & Retractable Rolling Ball Gel Pens, Fine Point, Black Ink, 12 Count (31020) ⚑	B001GAOTSW	1 EA		1		Received ⌄	Remove Line Receive & Return	☐

Contract No.
Serial Number
Attachments   **Attach/Link**
Notes

1000 characters remaining   expand | clear

Delete Add PO Save Updates Complete

Orders ▸ Search ▸ Receipts ▸ Summary - Receipt 380408

Create Qty Receipt **Create Cost Receipt**

Receipt No . 380408 🖶 has been created for the following PO No(s):

• PO/Reference No. J000000718 🖶

57

Cost Receipt

Cost receipts are used to receipt services

(1) Go to the Receipt tab to determine if there has been a previous receipt.
Then click on **Document Actions** and **Create Cost Receipt**

(2) Enter the dollar amount to be receipted and click **Complete**

Orders ▸ Search ▸ Receipts ▸ Summary - Receipt 381120

Create Qty Receipt   **Create Cost Receipt**

(3) This will create a receipt number

Receipt No . 381120 🖨 has been created for the following PO No(s):

• PO/Reference No. J000000658 🖨

Return Receipt

All ▾   Search (Alt+Q)   🔍   🛒 0.00 USD   ♡ ⚑ 🔔 👤

Orders ▸ Search ▸ Search Documents ▸ Receipts - PO J000000718

‹ Back to Results   1 of 34 Results ▾ ‹ ›

Purchase Order:
J000000718 Revision 0
3053282

Receipts   Document Actions ▾ | History 🖨 ?

There are no receipts for this PO.

Document Actions menu
Add Comment
Create Change Request
Add Notes to History
Cancel PO
Finalize Revision
Create Quantity Receipt
Create Credit Memo
Create Cost Receipt
Create Invoice
Print Fax Version
Soft Close PO
Close PO
Resend to Supplier

Supplier: AMAZON.COM
Status: Completed
Document Total: 10.49 USD
View Related Documents

Status

Purchase Order ›

Revisions

PO Approvals

Shipments

Change Requests

Receipts

(1) Go to the Receipt tab to determine if there has been a previous receipt.
Then click on **Document Actions** and **Create Quantity Receipt**

Orders ▶ Search ▶ Receipts ▶ Summary - Receipt To Be Assigned

Source   **Manual**

Delete   Add PO   Save Updates   Complete

Summary Comments (0) History

Exact Match: PO No. J000000715

Header Information

Receipt Name	2020-02-07 0309796 03

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	2/7/2020 mm/dd/yyyy		**BIO-RAD LABORATORIES INC**	Anna Leddige

RECEIPT ADDRESS

Attn: Eric Norris
323 Harrington Hall
241 Centennial Drive
Grand Forks, ND 58202-7101
United States

DELIVERY

Carrier: Other
Tracking No.
Attachments: Attach/Link
Notes (1,000 Chars. Max)

(2) Click **Show Receipt Details**

Receipt Lines

Line Details

Show Receipt Details   For Selected Lines: Remove Selected Items Go

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions	
J000000715	1	**Micro Test Tubes**	2239500EDU	1 EA		1		Returned	Remove Line / Receive & Return	☐

Contract No.
Serial Number
Attachments: Attach/Link
Notes
1000 characters remaining   expand | clear

Returned For: Damaged
RMA No.: 1234

(3) Click Attach/Link to attach any pertinent items Add Notes if appropriate.

(4) Enter the **Quantity** to be returned
Select the Dropdown under Line Status and update to **Returned**
Update the reason for the return by clicking the dropdown by Returned For
If you have received a **Return Material Authorization (RMA) No** form the supplier enter that information.

Delete   Add PO   Save Updates   Complete

(5) Click **Complete**

Orders ▶ Search ▶ Receipts ▶ Summary - Receipt 381117

Create Qty Receipt   Create Cost Receipt

(6) This will create a receipt number

Receipt No . 381117 🖨 has been created for the following PO No(s):

• PO/Reference No. J000000715 🖨

60

Payment Request Form

> TIP: Payment Request Form should be utilized when you already received your commodity or service, have an invoice that needs to be paid and a PO was not previously issued through the Jaggaer requisition process.

(1) On the Home Page, select **Payment Request**
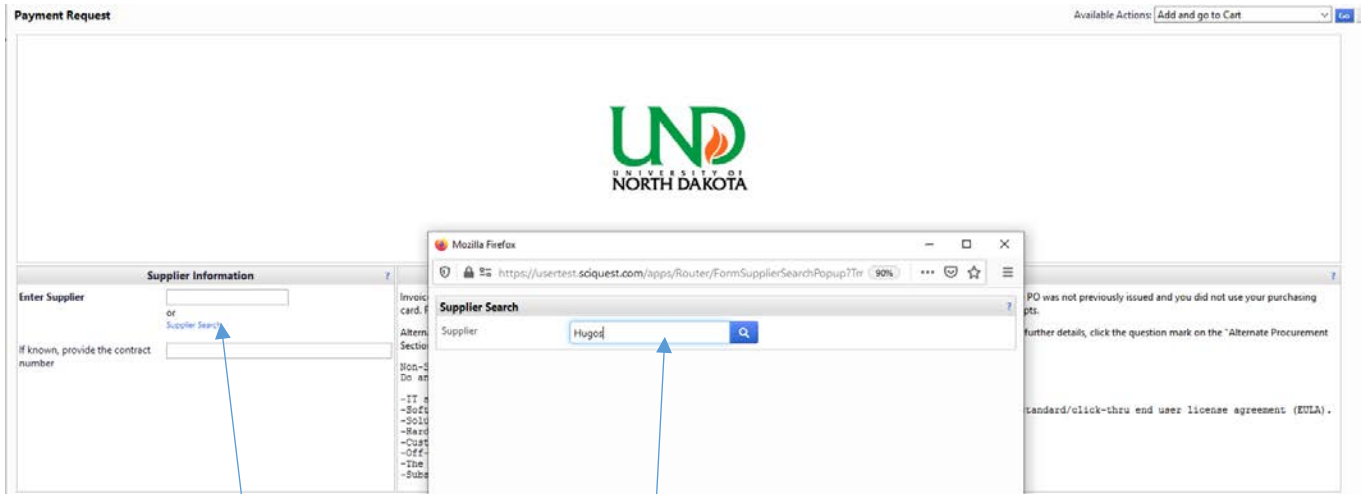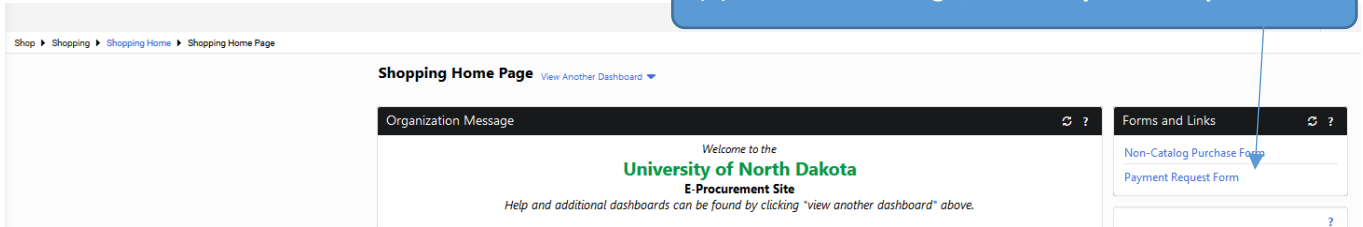
(2) Input the supplier or select supplier search
Enter the supplier name and click the **magnifying glass.**
Click **Select** by the correct Supplier.

Supplier Search

Supplier	Hugos

Results Per Page	20 ⌄	**Suppliers found: 1**	◀ Page 1 of 1 ▶ ?
		Supplier Name/Address	**Select**

HUGOS #3
　　PRIMARY: 1950 32ND AVE S STE 3 GRAND FORKS, ND 58201-6656 USA | Select

Supplier Information ?

Supplier HUGOS #3 more info...
select different supplier

Fulfillment Address PRIMARY: (preferred)
1950 32ND AVE S STE 3
GRAND FORKS, ND 58201-6656 USA

Distribution
The system will distribute purchase orders using the method(s) indicated below.

Fax +1 919-659-6100
Email (HTML Body) Lisa.swanson@gohugos.com
Manual
If known, provide the contract number

Instructions ?

Invoice section: complete the invoice section for any payments to vendor when the services and commodities have already been received and a PO was not previously issued and you did not use your purchasing card. For example, a supplier in town has a charge account setup and invoices you for last month's purchases. Attach copies of invoices or receipts.

Alternate procurement section: Complete this section for purchases greater than or equal to $10,000 and a contract does not currently exist. For further details, click the question mark on the "Alternate Procurement Section" or contact procurement for questions (UND.PPS@UND.edu).

Non-Standard Software section:
Do any of the following apply?

-IT solution costs more than $5,000.
-Software that requires a signed contract, agreement, or General Counsel addendum that is different from a standard/click-thru end user license agreement (EULA).
-Solution integrates or posts to Social Media.
-Hardware, software, or apps that stores or has integration with sensitive or confidential information.
-Custom software created by an outside vendor explicitly for a UND purchaser.
-Off-the-shelf application software that is modified by an outside vendor explicitly for a UND purchaser.
-The purchase is for a server or network appliance that provides server functions.
-Subscriptions (including Electronic resources) Upgrades, renewals, and support of the above.

Invoice Information ?

Supplier Inv # 123456
Invoice Date 02/10/2020
mm/dd/yyyy
Business Purpose Snacks for the residents halls

220 characters remaining   expand | clear

Is this a Wire Payment? ○ Yes ● No

Special Instructions

150 characters remaining   expand | clear

Attachments ?

Internal Attachments
[Add Attachments]   Size   Date
Subcontracts and Subrecipients (Accounts 624000)

Electronic approval of this payment by the PI and/or GCA Officer, serves as attestation that the charges are applicable to the statement of work, appear reasonable and progress to date is satisfactory.

(3) Complete the Invoice Information section

(4) Add a Copy of the suppliers invoice Click add Attachments

Add Attachments ✕

Attachment Type ● File ○ Link

File *

[Select files...]   Done ✓

%3110.pdf   100% ✕

Maximum upload file size: 4.88 MB

* Required   [Save Changes] [Close]

(5) Click Select files...
Find the file you would like to attach and click Save Changes

Items ?

Description	Price	Quantity	Ext. Price
Granola Bars	2.79	10	27.90
Trail Mix	6.29	3	18.87
Lemonade	2.99	5	14.95
		Total	**61.72**

recalculate list total

(6) Enter the items that were purchased. Click recalculate list total

62

Available Actions: Add and go to Cart ▾ Go Close

UND
UNIVERSITY OF
NORTH DAKOTA

Supplier Information ?

Supplier	HUGOS #3 more info... select different supplier
Fulfillment Address	PRIMARY: (preferred) 1950 32ND AVE S STE 3 GRAND FORKS, ND 58201-6656 USA
Distribution	
The system will distribute purchase orders using the method(s) indicated below:	
Fax	+1 919-659-6100
Email (HTML Body)	Lisa.swanson@gohugos.com
Manual	
If known, provide the contract number	

Invoice section: complete the invoice section for any payments to vendor when the services and comm... card. For example, a supplier in town has a charge account setup and invoices you for last month's pur...

Alternate procurement section: Complete this section for purchases greater than or equal to $10,000 an... Section" or contact procurement for questions (UND.PPS@UND.edu).

Non-Standard Software section:
Do any of the following apply?

-IT solution costs more than $5,000.
-Software that requires a signed contract, agreement, or General Counsel addendum that is different from a standard/click-thru end user license agreement (EULA).
-Solution integrates or posts to Social Media.
-Hardware, software, or apps that stores or has integration with sensitive or confidential information.
-Off-the-shelf application software that is modified by an outside vendor explicitly for a UND purchaser.
-Custom software created by an outside vendor explicitly for a UND purchaser.
-The purchase is for a server or network appliance that provides server functions.
-Subscriptions (including Electronic resources) Upgrades, renewals, and support of the above.

Invoice Information ? | **Attachments** ?

Supplier Inv #	123456
Invoice Date	2/10/2020 mm/dd/yyyy
Business Purpose	Snacks for the residents halls

Internal Attachments

Add Attachments

	Size	Date	
⬇ %3110.pdf	212.0 KB	2/10/2020	Remove

Subcontracts and Subrecipients (Accounts 624000)

Electronic approval of this payment by the PI and/or GCA Officer, serves as attestation that the charges are applicable to the statement of work, appear reasonable and progress to date is satisfactory.

(7) As long as your order if not over $10K or a software/hardware purchase, go to the Top of the Page and click **Add and go to Cart**
See next page if either of the above are true.

(8) The request is now a Cart that can either be assigned to a requestor or proceed to checkout.
Refer to Assigning a Cart or Creating a requisition if instructions are needed.

Shopping Cart for request2

Name this cart: 2020-02-10 request2 01

◀ Continue Shopping

1 Item(s) for a total of **61.72** USD
subtotal: 61.72 USD
estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

Have you made changes? Update | 🖨 | 💬 Help | Empty Cart | Create New Cart | Perform an action on (0 items selected)... ▾ | Select All ☐

HUGOS #3 more info...

	Product Description	Unit Price	Quantity	Total ☐
📄	Payment Request open form... Is this a Wire Payment? No Commodity Code [ ] 🔍 ❌ Required field	61.72 Update More Actions ▾	1 Shipping Handling	61.72 0.00 USD 0.00 USD ☐
			Supplier subtotal	**61.72** USD

TIP: If you have an item or service that is over $10K, complete the lower part of the form for the Alternate Procurement Request.

Alternate Procurement Request	?

Alternate Procurement Type [dropdown]

Describe anticipated future purchases with this supplier. [text box]
2000 characters remaining   expand | clear

Will this purchase limit the ability for other vendors to compete on future purchases
○ No
○ Yes

Justification for this purchase [text box]
2000 characters remaining   expand | clear

Purchase available from one source - NDCC 54-44.4-05(2)(a)   ☐

Purchase is for experimentation or trial - NDCC 54-44.4-05(2)(b)   ☐

No acceptable bid/proposal received pursuant to competitive solicitation - NDCC 54-44.4-05(2)(c)   ☐

Commodities purchased for over-the-counter-resale - NDCC 54-44.4-05(2)(d)   ☐

Used commodity available on short notice - NDCC 54-44.4-05(2)(g)   ☐

Replacement part from the manufacturer (no commercial substitute) - NDCC 54-44.4-05(2)(h)   ☐

Compatibility and essential to functioning of the currently owned equipment - NDCC 54-44.4-05(2)(i)   ☐

Limited Procurement (<3 vendors or not posting online) - NDUS Procedure 803.1(4)   ☐

Payment Card Industry (PCI) - Will the supplier be processing payments on behalf of UND?
○ No
○ Yes

Has the equipment certification been completed?Required
○ No
○ Not Applicable
○ Yes

Alternate Procurement Additional Information
In addition to the completion and submission of this form, one or more of the following additional documents may be required: a.) product brochure that identify technical specifications; b.) federal grant or sponsored agreement documentation that shows a particular piece of equipment was required in order to comply with grant; c) RFP's that demonstrate a bid process was completed to establish a standard; d.) documentation from a prior order that establishes compatibility requirements. By submitting this document, you state that you have prepared the documentation based on the Procurement and Payment Services policies and the facts and data set forth are complete and accurate to the best of the your knowledge and belief, and certifies that he/ she has no actual or potential conflict of interest in this purchase, and is in compliance with the university's Code of Conduct. Violation of this code is cause for dismissal or other appropriate disciplinary action.

TIP: If you have an item or service that is hardware or software complete the lower part of the form for the Non-Standard IT Request

Non-Standard IT Request	?

Software Name [text box]

Is this a renewal?
○ No
○ Yes

If yes, what is the original non-standard software and services reference number? [text box]

If this is not a renewal, please complete the information below. UND SITE

Type [dropdown]

Data classification [dropdown]

Click to review data classifications

Audience for the software/system (who will be using it?) [text box]
2000 characters remaining   expand | clear

Business Need/Problem [text box]
2000 characters remaining   expand | clear

Proposed Solution [text box]
2000 characters remaining   expand | clear

Consistency/Fit with Organization's Mission [text box]
2000 characters remaining   expand | clear

Has a VPAT been requested from the vendor and attached with this request?
○ No
○ Yes

IT Legal Review
If cost is greater than $2500 or any of the following are applicable then General Counsel legal review is required. 1. store confidential information 2. connect to social media 3. no standard EULA (end user license agreement)

Total

Non-PO Invoice / Matching Exception Invoice Approval

Discrepancies in invoicing will be primarily handled by Payment Services. Payment Services will work with Department Requestors on invoice questions.

Mon 2/10/2020 11:13 AM

UND.PPS@UND.edu

Comment added to Invoice V0000150

To Parton, Tonya

UNIVERSITY OF
NORTH DAKOTA

Re: COMMENT ADDED TO INVOICE #: V0000150

Dear Tonya Parton,

Tonya Parton has commented on Invoice V0000150

Comment: Please review the invoice for accuracy. Review the accounting lines, and the amount invoiced. If approved, please indicate via Comment your approval.

To reply to this comment click on the following link

View Comment

Support Team Contact Information:
+1 701-777-2771 UND.PPS@UND.edu

Thank you,
University of North Dakota

(1) The requestor will receive an email with a comment or questions regarding the invoice. Click View Comment

Orders ▸ Search ▸ Search Documents ▸ Comments - Supplier Invoice No. 4a2a5757138f (Doc. No. V0000150)

‹ Back to Results   1 of 4 Results ▼   ‹ ›

Invoice Number	**V0000150**	Supplier Account No.
Supplier Invoice No.	**4a2a5757138f**	
Supplier Name	**AMAZON.COM**	

| Buyer Invoice | Approvals | Matching | **Comments (3)** | Supplier Messages | Attachments | History |

Add Comment

Show comments for   Invoice   ⌄

Records Found: 3

Tonya Parton [Reply To] [New Comment]
Applies To: Invoice - V0000150
Comment Added - 2/10/2020 11:50 AM

Please review invoice for accuracy. Comment your approval.

(2) Review the comments

65

Invoice Number   **V0000150**   Supplier Account No.
Supplier Invoice No.   **4a2a5757138f**
Supplier Name   **AMAZON.COM**

Available Actions [Add Comment ▼] [Go]

(3) Click Buyer Invoice tab to review the items on the invoice Once you have reviewed Click Go by Add Comment

Buyer Invoice   Approvals   Matching   Comments (3)   Supplier Messages   Attachmen

Summary   Payment Information | Discount, Tax, Shipping & Handling | Co

Hide header   Hide value descriptions

General

Invoice Type	Invoice	
Pay Status	In Process	
Invoice Number	V0000150	
Supplier Invoice No.	4a2a5757138f	
Supplier Name	AMAZON.COM more info...	
Invoice Owner	Anna Leddige	
Invoice Date	2/5/2020	
Discount Date	no value	
Due Date	3/6/2020	
Terms	0% 0, Net 30	
Terms Discount	0.00 USD	

Remit To
PO BOX 530958
ATLANTA, GA 30353-0958

USA
Address Id 21

Bill To
UND PAYMENT SERVICES
TWAMLEY HALL ROOM 409
264 CENTENNIAL DRIVE STOP 8356
GRAND FORKS, ND 58202-8356
United States

Note/Attachments

External Note	Extrinsic: carrierName=PPI Test Mode Order - CARRIER_NAME | Extrinsic: carrierTrackingNumber=P... more...
Internal Note	no note
External Attachments	Size Date
Internal Attachments	Size Date

Match Status	Matched
Invoice Source	Electronic
Contains substituted item(s)	✗

Payment Information

Accounting Date	2/5/2020
F.O.B.	N/A
Payment Method	Unknown
Record No.	no value
Record Date	no value
Hold Check	✗

View/edit by line item...

Discount, Tax, Shipping & Handling

Discount, tax, shipping & handling

Allocation	Sum of All Header-level	Sum of lines
Terms Discount	0.00 USD	
Discount	7.48 USD	0.00 USD
Tax 1	0.00 USD	0.00 USD
Tax 2	0.00 USD	0.00 USD
Shipping	7.48 USD	0.00 USD
Handling	0.00 USD	0.00 USD
Total		39.99 USD

View/edit by line item...

Codes

LINE	Account	Department	Fund / Dept	Project	Program Code
	536015 Office Supplies	3130 Procurement & Payment Services	22116-3130 Accounts Payable	no value	no value

View/edit by line item...

Line Item Details

Hide line details

J000000727

	PO Line	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1	1	"Made for Amazon" Portable Battery Base for Echo (3rd Gen) and Echo Plus (2nd Gen) - Black ◇ more info...	B07JM5H658	EA	39.99 USD	1 EA	39.99 USD −7.48 USD

Manufacturer Name	Mission Cables
Manufacturer Part Number	UPC-752830507661
Supplier Part Auxiliary ID	134-1324937-3370733,1

more info...

PO Number	J000000727
PO Department	no value
Substitute Item	✗
Line Match Status	Matched

Matching Summary

	Ordered	Received	Net Invoiced
Quantity:	1	1	2
Ext. Price:	39.99 USD	--	79.98 USD

Related Documents
   Invoices: 1 / Credits: 0 / Receipts: 1   show list
Contract No.
Commodity Code   52000000 Domestic Appliances and Supplies and Consumer Products

External Note	Extrinsic: soldBy=PPI Test Mode Order - SELLER_NAME
Internal Note	no note
External Line Attachments	
Internal Line Attachments	

Discount, tax, shipping & handling

	Line-level
Discount	0.00 USD
Tax 1	0.00 USD
Tax 2	0.00 USD
Shipping	0.00 USD
Handling	0.00 USD

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s):

- ☐ Anna Leddige (Prepared for, Requisition prepared by) <anna.leddige@ndus.edu>
- ☐ Jana K Thompson (Receipt Creator) <jana.k.thompson@ndus.edu>
- ☑ Tonya Parton <tonya.parton@ndus.edu>

add email recipient...

This invoice is accurate, we received one additional item.

(4) Select the individual to respond to and add the comment.
Add an attachment if pertinent
Click **Add Comment**

942 characters

Attach file to this document (optional):

Attachment Type	File
File Name	

Add Comment   Close

Invoice Status (Paid, In Process, Payable?)

1. Find the invoice document (starts with a "V").

Easiest way is to use the quick search at the top of Jaggaer.
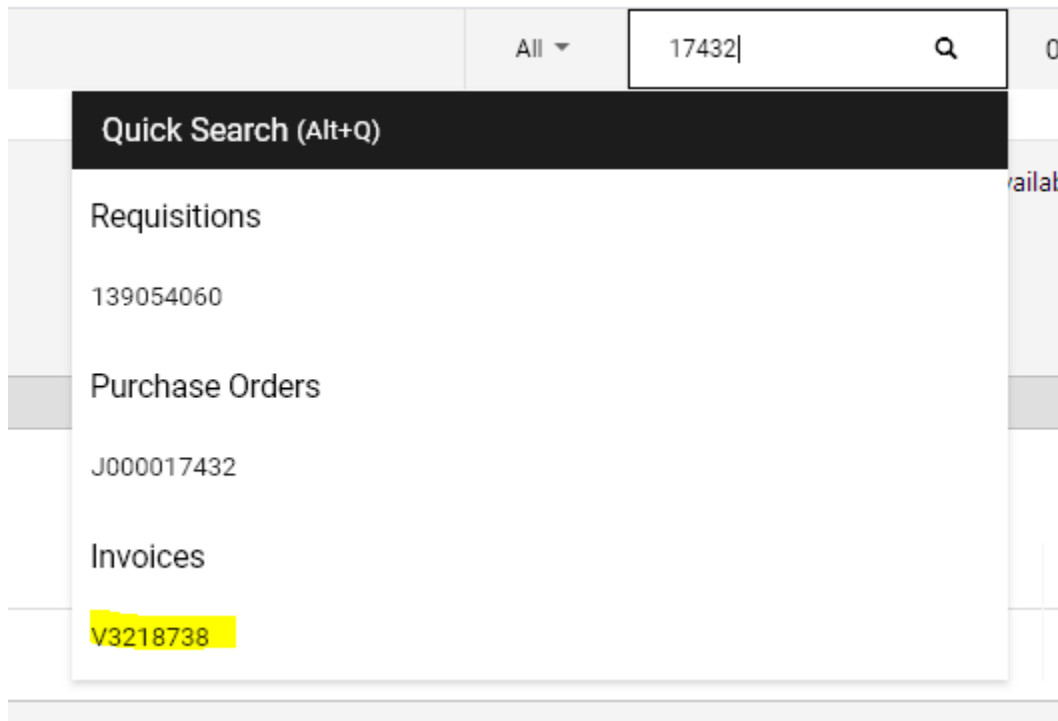
If you're on the requisition or purchase order document, click view related documents to view related invoices.
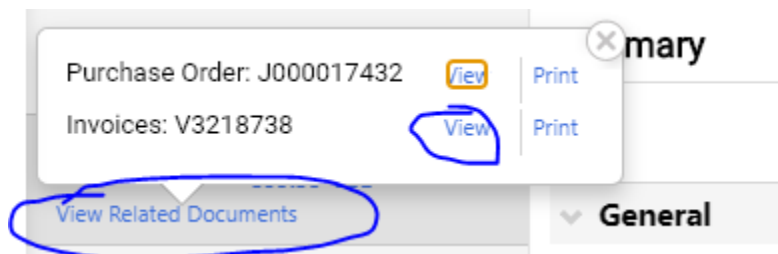
2. From the invoice document page, check the pay status field.

Paid = Paid, voucher should also have a record number and record date.

Payable = not paid, the voucher is pending in peoplesoft to be paid around the due date.

In Process = invoices is in the invoice workflow in jaggaer.

Example of Payable Invoice

General	?
Invoice Type	Invoice
Pay Status	Payable
Invoice Number	V3218738
Supplier Invoice No.	35657
Supplier Name	PROBITAS PROMOTIONS more info...
Invoice Owner	Susan Holden
Invoice Date	12/14/2020
Discount Date	no value
Due Date	1/13/2021
Terms	0% 0, Net 30
Terms Discount	0.00 USD
Invoice Name	2020-12-16 0270892 01
Payment Terms Override	✗
Invoiced By	Susan Holden
Match Status	Do Not Match
Invoice Source	Automated
Contains substituted item(s)	✗

Addresses	?
Remit To	edit
1123 N 42ND ST	
GRAND FORKS, ND 58203	
USA	
Phone 1-701-7461211-204	
Address Id 7	
Bill To	edit
UND PAYMENT SERVICES	
TWAMLEY HALL ROOM 409	
264 CENTENNIAL DRIVE STOP 8356	
GRAND FORKS, ND 58202-8356	
United States	

Payment Information	?
Override Accounting Date	✗ edit
Accounting Date	12/16/2020
F.O.B.	Destination
Payment Method	Unknown
Record No.	no value
Record Date	no value

Example of an In Process invoice

To view where in the workflow the invoice is at, click on the approval tab.

Buyer Invoice	Approvals	Matching	Comments	Supplier Messages	Attachments (1)	Histor

| Summary | Payment Information | Discount, Tax, Shipping & Handling | Codes |

Hide header

General	?
Invoice Type	Invoice
Pay Status	In Process
Invoice Number	V3219668

Example of a Paid invoice

General	?
Invoice Type	Invoice
Pay Status	Paid
Invoice Number	V3219599
Supplier Invoice No.	November 2020 Sales Tax
Supplier Name	TAX COMMISSIONER,ND OFFICE OF THE STATE more info...
Invoice Owner	Melissa Sola
Invoice Date	12/22/2020
Discount Date	no value
Due Date	12/22/2020
Terms	0% 0, Net 0
Terms Discount	0.00 USD
Invoice Name	2020-12-30 0613627 01
Payment Terms Override	✗
Invoiced By	Melissa Sola
Match Status	Do Not Match
Invoice Source	Automated
Contains substituted item(s)	✗

Addresses	?
Remit To	edit
600 E BOULEVARD AVENUE DEPT 127	
BISMARCK, ND 58505-0553	
USA	
Address Id 2	
Bill To	edit
UND PAYMENT SERVICES	
TWAMLEY HALL ROOM 409	
264 CENTENNIAL DRIVE STOP 8356	
GRAND FORKS, ND 58202-8356	
United States	

Payment Information	?
Override Accounting Date	✗ edit
Accounting Date	12/30/2020
F.O.B.	Destination
Payment Method	Check
Record No.	123020
Record Date	12/30/2020

Request New Supplier

TIP: Utilize this form if you are working with a new supplier and will be purchasing something in the future.

Shopping Home Page View Another Dashboard ▾

Organization Message

Welcome to the
University of North Dakota
E-Procurement Site
Help and additional dashboards can be found by clicking "view another dashboard" above.

Shop

Search Everything Product Keywords, Description, Supplier, Manufacturer

Forms and Links

Non-Catalog Purchase Form
Payment Request Form

Request Sourcing Event
Request New Supplier

(1) On the Home Page, select **Request New Supplier** Form

Request New Supplier

Supplier request form	New Supplier Request
Supplier name ★	John's IT Company

★ Required

Submit   Close

(2) Enter the supplier Name
Click **Submit**

My Supplier Requests

John's IT Company

Template	**New Supplier Request**
Request Status	**Incomplete**

Questions ✓

General Request Questions ✓

New Supplier Details ✓

Review and Complete

Supplier Request Workflow

Questions 🖶 Print Request | History | ?

Overview	Progress
General Request Questions	⊘ Incomplete
New Supplier Details	⊘ Incomplete

(3) Click **Next**

Next ▸

My Supplier Requests

John's IT Company

| Template | **New Supplier Request** |
| Request Status | **Incomplete** |

Questions ✔

   General Request Questions ✔

     New Supplier Details ✔

Review and Complete

Supplier Request Workflow

Questions - General Request Questions

🖶 Print Request | History | ?

⌄ Company Information

Supplier Name ★

John's IT Company

Reason for Request ★

New Supplier

1988 characters remaining

(4) Enter the Reason for the Request and click Next

★ Required

‹ Previous   Save Progress   Next ›

John's IT Company

| Template | **New Supplier Request** |
| Request Status | **Incomplete** |

Questions ✔

   General Request Questions ✔

   New Supplier Details ✔

Review and Complete

Supplier Request Workflow

Questions - New Supplier Details

🖶 Print Request | History | ?

⌄ On This Page

Addresses (9)

Contact Information (7)

⌄ Addresses

Name ★

Grand Forks

Address Type ★

Fulfillment

Country

Street Line 1

123 Main Street

Street Line 2

Street Line 3

City/Town

Grand Forks

(5) Enter the address information

State/Province

ND

Postal Code

58202

71

Contact Information

Name *

John Smith

Type *

Sales

First Name

Last Name

Title

Email *

John.Smith@JohnIT.com

Phone

701-746-2345   ext.

International phone numbers must begin with +

★ Required

< Previous   Save Progress   Next >

(5) Enter the content information and click **Next**

My Supplier Requests

John's IT Company

Template	New Supplier Request
Request Status	Incomplete

Questions ✔
   General Request Questions ✔
   New Supplier Details ✔

Review and Complete

Supplier Request Workflow

Review and Complete

🖶 Print Request | History | ?

✔ Required fields complete

Section	
Questions	...lete
General Request Questions	...lete
New Supplier Details	...lete

Certification

☑ I certify that the statements and information in this request are true and correct to the best of my knowledge and belief.

★ Required

< Previous   Complete Request

(6) Click the certification box Click Complete Request

Confirm ✕

Are you sure are ready to complete your new supplier request?

Yes   No

(7) Click Yes

72

Sourcing Request (Bid, Request for Proposals, Request for Qualifications)

TIP: Utilize this form to request a procurement sourcing event for a purchase over $10K.

(1) On the Home Page Click **Request Sourcing Event**

Shop ▶ Shopping ▶ Shopping Home ▶ Shopping Home Page

Shopping Home Page View Another Dashboard ▼

Organization Message

Welcome to the
University of North Dakota
E-Procurement Site
Help and additional dashboards can be found by clicking "view another dashboard" above.

Forms and Links

Non-Catalog Purchase Form
Payment Request Form

Request Sourcing Event
Request New Supplier

🛒 Shop

Search | Everything | Product Keywords, Description, Supplier, Manufacturer

Initiate Sourcing Request ✕

Sourcing Request Title ★   Tshirts

Sourcing Request Template   UND Sourcing Request

★ Required | Open Request Form | | Close |

(2) Enter the Title and click **Open Request Form**
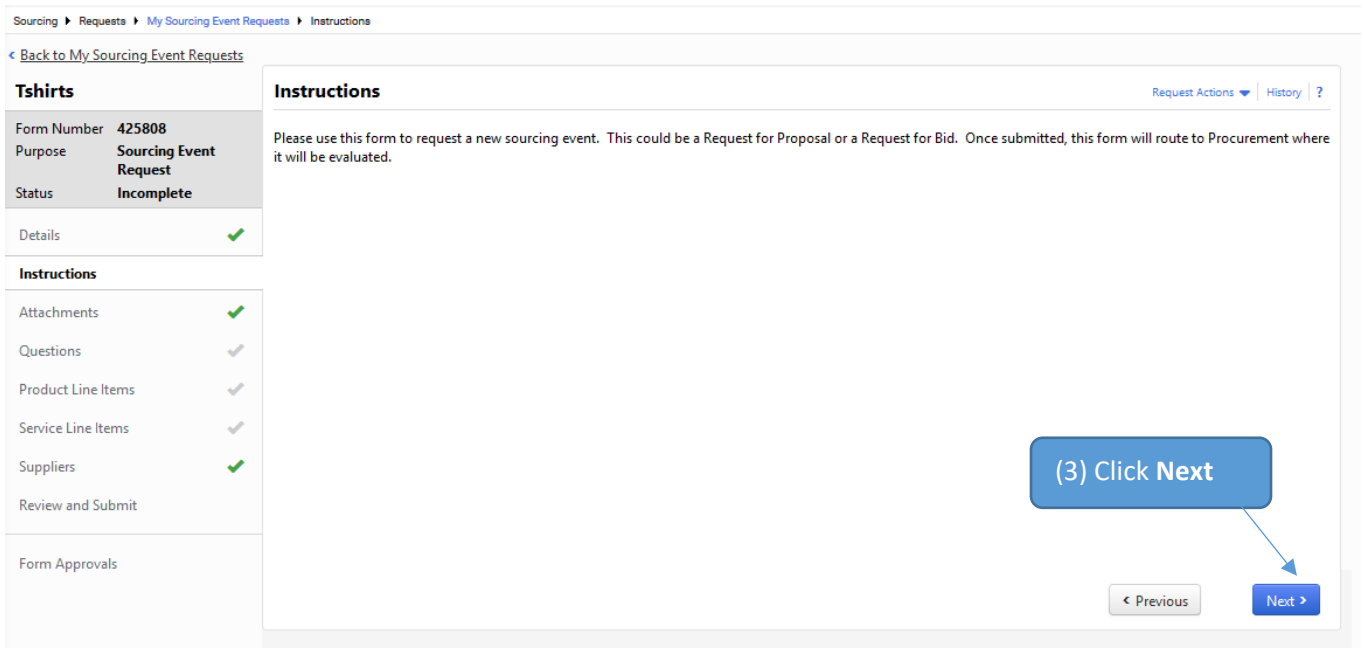
Sourcing ▶ Requests ▶ My Sourcing Event Requests ▶ Instructions

‹ Back to My Sourcing Event Requests

Tshirts

Form Number	425808
Purpose	Sourcing Event Request
Status	Incomplete

Details ✔

Instructions

Attachments ✔
Questions ✔
Product Line Items ✔
Service Line Items ✔
Suppliers ✔
Review and Submit

Form Approvals

Instructions   Request Actions ▼ | History | ?

Please use this form to request a new sourcing event. This could be a Request for Proposal or a Request for Bid. Once submitted, this form will route to Procurement where it will be evaluated.

(3) Click **Next**

‹ Previous   Next ›

‹ Back to My Sourcing Event Requests

Tshirts

Form Number	425808
Purpose	**Sourcing Event Request**
Status	**Incomplete**

Details ✔

Instructions

Attachments ✔

Questions ✔

Product Line Items ✔

Service Line Items ✔

Suppliers ✔

Review and Submit

Form Approvals

Attachments

Request Actions ▾ | History | ?

Please add your attachments below.

Add Attachment

(4) Add attachments if necessary.
Example: Specifications

‹ Previous | Save Progress | Next ›

Add Attachment ✕

Attachment ★   *No File Attached* Upload

★ Required   Save Changes   Close

Upload ✕

Title ★   Specifications

File ★   Browse... %3110.xlsx
Maximum upload file size: 25.0 MB

★ Required   Save Changes   Close

(5) Click **Upload**
Click **Browse** & add the pertinent document
Click **Save Changes**

Add Attachment ✕

Attachment ★   ⬇ Specifications Upload ▾

★ Required   Save Changes   Close

TIP: Word documents are preferred for Specifications

‹ Back to My Sourcing Event Requests

Tshirts

Form Number	425808
Purpose	Sourcing Event Request
Status	Incomplete

Details ✔

~~Form Approvals~~

Attachments   Request Actions ▾ History ?

#	Attachment
1	⬇ Specifications

Add Attachment

(4) Click Next

‹ Previous   Save Progress   Next ›

‹ Back to My Sourcing Event Requests

Tshirts

Form Number	425808
Purpose	Sourcing Event Request
Status	Incomplete

Details ✔
Instructions
Attachments ✔
Questions ✔
Product Line Items ✔
Service Line Items ✔
Suppliers ✔
Review and Submit

Form Approvals

Questions - Questions   Request Actions ▾ History ?

★ Response Is Required
🔍 Question Text Is Searchable

∨ **Request Information**

Select the Type of Request ★ 🔍 ❔

○ Request for Proposal
◉ Request for Bid
○ Request for Information
○ Request for Qualifications
○ Quote request

Has funding been identified for this purchase? ★

◉ Yes   ○ No

Are federal grant funds utilized? ★

○ Yes   ◉ No

Does this purchase consist of IT hardware, software, applications? ★ ❔

○ Yes   ◉ No

Department ★

[3130 - Procurement & Payment ▾]

Primary Commodity ★ ❔

[Athletic Wear ▾]

Supplier List ❔

Adidas: john@adidas.com
Daydreams: jola@daydreams.com
S&S Promotions:
sales@S&Spromo.com

1910 characters remaining

(6) Answer the questions and click Next

TIP: Click on the Question marks to get additional information about the question.

‹ Previous   Save Progress   Next ›

Do any of the following apply?

IT solution costs more than $5,000.
Software that requires a signed contract, agreement, or General Counsel addendum that is different from a standard/click-thru end user license agreement (EULA).
Solution integrates or posts to Social Media.
Hardware, software, or apps that stores or has integration with sensitive or confidential information.
Custom software created by an outside vendor explicitly for a UND purchaser.
Off-the-shelf application software that is modified by an outside vendor explicitly for a UND purchaser.
The purchase is for a server or network appliance that provides server functions.
Subscriptions (including Electronic resources)
Upgrades, renewals, and support of the above.

75

‹ Back to My Sourcing Event Requests

Tshirts

Form Number	425808
Purpose	**Sourcing Event Request**
Status	**Incomplete**

Details ✔

Instructions

Attachments ✔

Questions ✔

    General Request Information ✔

Request for Bid ✔

Product Line Items ✔

Service Line Items ✔
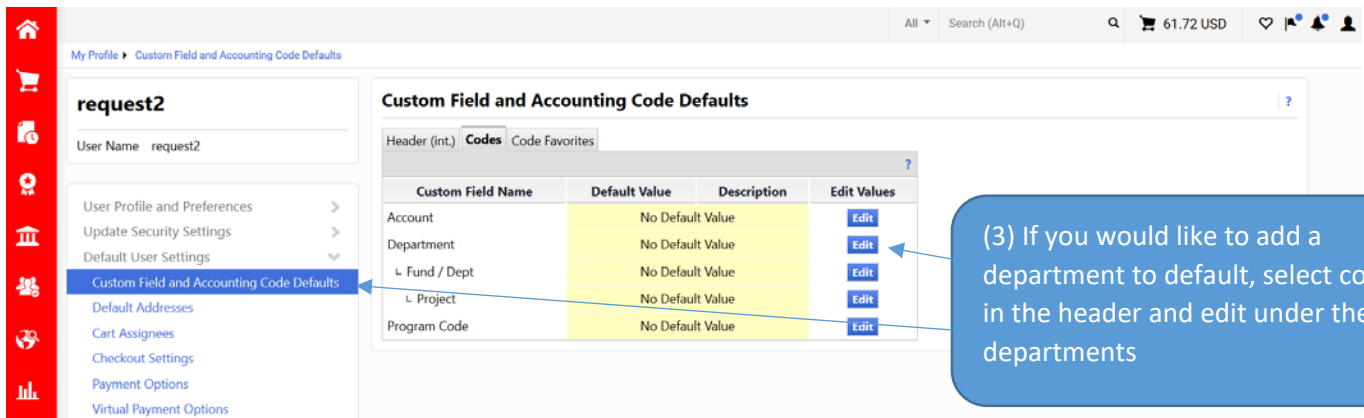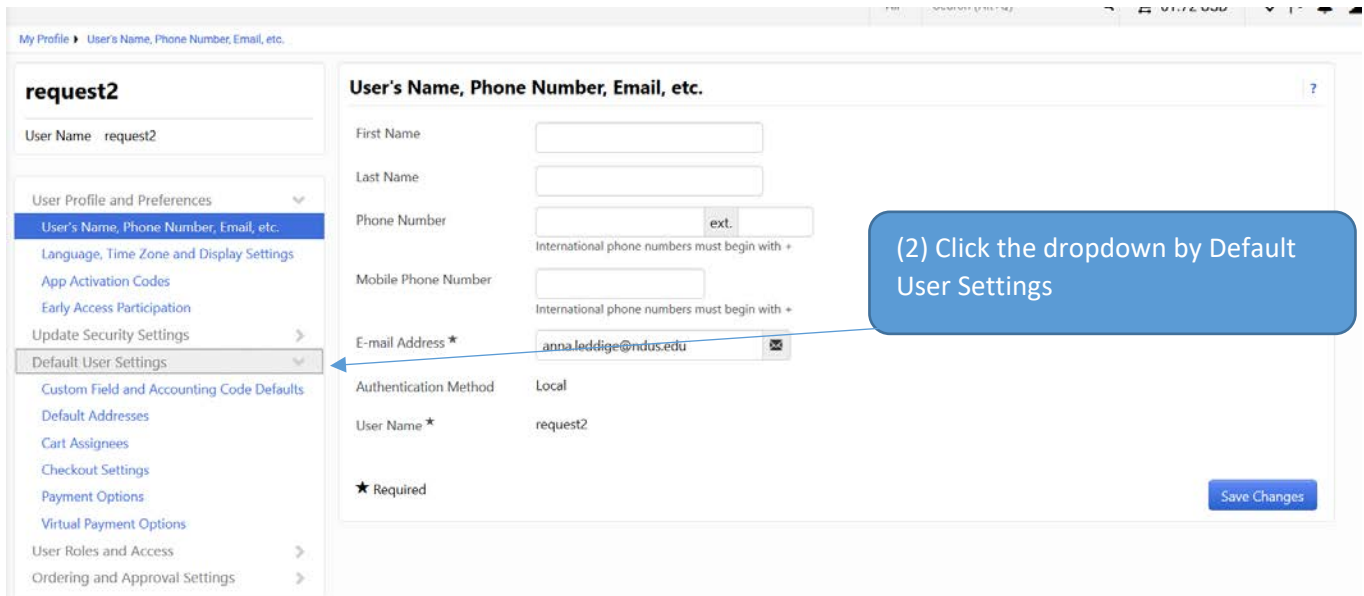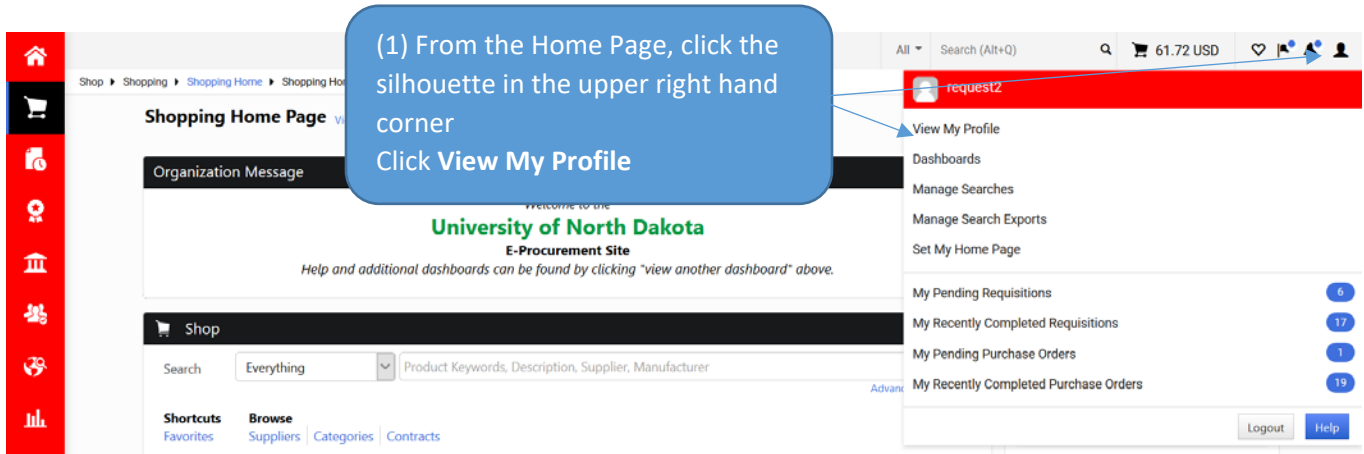
Suppliers ✔

Review and Submit

Form Approvals

Questions - Request for Bid

Request Actions ▾ | History | ?

★ Response Is Required

∨ **Request for Bid**

Specifications ★

Cotton Blend

1988 characters remaining

Delivery date ★

04/01/2020 🔲

mm/dd/yyyy

Delivery address ★

264 Centennial Dr
Grand Forks, ND 58202

1960 characters remaining

Will the vendor be on-site longer than 30 days or require any State licenses? ★

◯ Yes   ◉ No

Award of bid items ★

By Line Item ▾

Pricing of bid items ★

Firm Fixed ▾

Will there be a service contract? ★

◯ Yes   ◉ No

Is training needed? ★

◯ Yes   ◉ No

(7) Answer the questions and click **Next**

‹ Previous | Save Progress | Next ›

‹ Back to My Sourcing Event Requests

Tshirts

Form Number	**425808**
Purpose	**Sourcing Event Request**
Status	**Incomplete**

Details ✔

Instructions

Attachments ✔

Questions ✔

    General Request Information ✔

    Request for Bid ✔

Product Line Items ✔

Service Line Items ✔

Suppliers ✔

Review and Submit

Form Approvals

Product Line Items

Request Actions ▾ | History | ?

Please add your first Product Line Item.

Add Product Line Item ▾

(8) Click either Product Line Items or Service Line Items on the left hand column dependent upon what is being procured.
When you are on the right tab, click **Add Product Line** or **Add Service Line**

‹ Previous | Save Progress | Next ›

Add Product Line Item ✕

Name *   T-Shirts

Description   T-Shirts for Mens Basketball

2472 characters remaining

Catalog Number

Quantity *   250.00

Unit of Measure   EA - Each

Commodity Code   53102900 - Athletic wear   Edit

★ Required   Save Changes | Close

(9) Enter Information and Click **Save Changes**

‹ Back to My Sourcing Event Requests

Tshirts

Form Number	425808
Purpose	Sourcing Event Request
Status	Incomplete

Details ✔
Instructions
Attachments ✔
Questions ✔
    General Request Information ✔
    Request for Bid ✔
Product Line Items ✔
Service Line Items ✔
Suppliers ✔
Review and Submit

Form Approvals

Product Line Items

Request Actions ▾ | History | ?

[Add Product Line Item ▾]

Line Item Actions ▾

Name	Item Status	Description	Catalog Number	Qty	UOM		
							☐
T-Shirts	🏳	T-Shirts for Mens Bask... (See full description)	–	250	Each	[Edit ▾]	☐

(10) Click Next

[‹ Previous] [Save Progress] [Next ›]

‹ Back to My Sourcing Event Requests

Tshirts

Form Number	425808
Purpose	Sourcing Event Request
Status	Incomplete

Details ✔
Instructions
Attachments ✔
Questions ✔
    General Request Information ✔
    Request for Bid ✔
Product Line Items ✔
Service Line Items ✔
Suppliers ✔
Review and Submit

Form Approvals

Service Line Items

Request Actions ▾ | History | ?

Please add your first Service Line Item.

[Add Service Line Item]

(11) If you are only procuring a product, click Next. If not, enter the correct information.

[‹ Previous] [Save Progress] [Next ›]

78

‹ Back to My Sourcing Event Requests

Tshirts

Form Number	425808
Purpose	**Sourcing Event Request**
Status	**Incomplete**

Details ✔
Instructions
Attachments ✔
Questions ✔
　General Request Information ✔
　Request for Bid ✔
Product Line Items ✔
Service Line Items ✔
Suppliers ✔
Review and Submit
Form Approvals

Suppliers

Request Actions ▾ | History | ?

Form Suppliers   Add Suppliers to Form

Search Registered Supplie~~~~~~~~~~~~~~~~~~lier not found)

Supplier
Relationship
Supplier Contact
Zip Code
Commodity Code

Clear   🔍 Search

(12) Disregard this supplier page as you previously entered the potential suppliers under General Request Information.
Click Next

‹ Previous   Next ›

‹ Back to My Sourcing Event Requests

Tshirts

Form Number	425808
Purpose	**Sourcing Event Request**
Status	**Incomplete**

Details ✔
Instructions
Attachments ✔
Questions ✔
　General Request Information ✔
　Request for Bid ✔
Product Line Items ✔
Service Line Items ✔
Suppliers ✔
Review and Submit
Form Approvals

Review and Submit

Request Actions ▾ | History | ?

✔ Required Fields Complete

Section	Progress
Details	✔ Required Fields Complete
Attachments	✔ Required Fields Complete
Questions	✔ Required Fields Complete
Product Line Items	✔ Required Fields Complete
Service Line Items	✔ Required Fields Complete
Suppliers	✔ Required Fields Complete

(13) Click Next

‹ Previous   Submit

Confirm   ✕

Are you sure you want to submit this form?

Yes   No

(14) Click Yes

79

‹ Back to My Sourcing Event Requests

Tshirts

Form Number	**425808**
Purpose	**Sourcing Event Request**
Status	**Under Review**

Details ✔

Instructions

Attachments ✔

Questions ✔

   General Request Information ✔

   Request for Bid ✔

Product Line Items ✔

Service Line Items ✔

Suppliers ✔

Review and Submit

Form Approvals

Form Approvals

History | ?

➡
Submitted
2/10/2020 11:36 AM

Sourcing Request Dept
Active ♺
View approvers

Procurement Review
Future ➡
View approvers

🏁
Finish
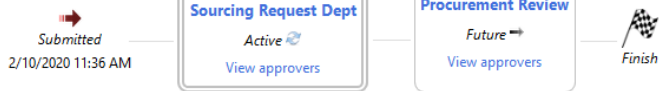
(15) Click Form Approval to see where the form will route

80

User Default Settings

There are defaults available for each user that will auto-populate within the current forms.

(1) From the Home Page, click the silhouette in the upper right hand corner
Click **View My Profile**

(2) Click the dropdown by Default User Settings

(3) If you would like to add a department to default, select code in the header and edit under the departments

request2

User Name   request2

User Profile and Preferences   >
Update Security Settings   >
Default User Settings   ⌄
    Custom Field and Accounting Code Defaults
    Default Addresses
    Cart Assignees
    Checkout Settings
    Payment Options
    Virtual Payment Options

Default Addresses

Ship To | Bill To

?

Select an address to edit   Select Addresses for Profile

Shipping Addresses

Procurement and Payment Services

(4) To default a shipping address
Click Default Addresses,
Select Addresses for Profile

---

request2

User Name   request2

User Profile and Preferences   >
Update Security Settings   >
Default User Settings   ⌄
    Custom Field and Accounting Code Defaults
    Default Addresses
    Cart Assignees
    Checkout Settings
    Payment Options
    Virtual Payment Options

Cart Assignees

Add Assignee...

My Cart Assignees   ?

Name	Action	
Tonya Parton	Set as Preferred	Remove
David Krause	Set as Preferred	Remove

(5) To default a cart assignee,
select Cart Assignees
Click **Add Assignee**

Saved Searches

Orders ▸ Search ▸ Search Documents ▸ Document Search

Orders

Type to Search Documents...

Search ▸
My Orders
Approvals

Search Documents

Procurement Requests

Receipts

View Saved Searches

Download Export Files

Create and Manage Export Templates

(1) Click on **Orders** on the right side
Search
Select View **Saved Searches**

Orders ▸ Search ▸ View Saved Searches ▸ Document Search

Add New ▾

Expand All   Collapse All

▲ **Personal**
You have no personal searches.

▲ **Shared**
AP Saved Searches
UND Shared searches

Manage Searches   ?

This "saved searches" page is a filtered view of "favorites." The folders listed on the left contain document searches you have saved (listed under "Personal") or document searches that are being shared with you (listed under "Shared"). To add a document search to a folder, select the "Save Search" button after performing a document search and follow the prompts. Use the top-level "favorites" tab to manage (create, delete, move/copy, edit) the folders listed on the left.

(2) Click UND Shared searches

Orders ▸ Search ▸ View Saved Searches ▸ Document Search

Add New ▾

Expand All   Collapse All

▲ **Personal**
You have no personal searches.

▲ **Shared**
AP Saved Searches
UND Shared searches

UND Shared searches   Folder Actions ▾   ?

Actions for Selected Favorites ▾

Invoices pending no receipt
Pending invoices that need to be receipted.

    Add Shortcut   Export   Go   ☐

Invoices pending not matched
Invoices in workflow that are not matched.

(3) Click on appropriate report you are looking to run

Pending orders
pending purchase requests

    Edit | Move | Copy | Delete

POs receipted no invoice
POs fully receipted with no invoice.

    Add Shortcut   Export   Go   ☐
    Edit | Move | Copy | Delete

Solicitations - in progress
Solicitations in progress that have not been awarded.

    Add Shortcut   Export   Go   ☐
    Edit | Move | Copy | Delete

< Back to Edit Search   Start New Search

Showing **1 - 100** of 161 Results

Search Details   ?

Saved   Pending orders
Search:

Filtered by

Type: Requisitions
Date Range: All Dates

[remove all]

Workflow Status
☑ Pending

[Save Changes ▼]   [Export Search]

Refine Search Results   ?

Type
[Requisitions   ▼]

Date Range
[All Dates   ▼]

Supplier   ▽+
Request New Supplier (32)
HALF BROTHERS BREWING COMPANY (25)
STAPLES CONTRACT & COMMERCIAL (22)
NORBYS OFFICE SERVICES (17)   [more]

Current Workflow Step   ▽+
Department Approval (105)
Export Controls Approval (30)
Budget Check 1 Response (6)
Food and Travel Review (4)   [more]

Prepared For   ▽+
Carissa Sigdahl (15)
David Krause (7)
Anna Leddige (7)
Dawn Seaver (7)   [more]

Prepared By   ▽+
David Krause (22)
Tonya Parton (22)
Carissa Sigdahl (11)
request2 (9)   [more]

Approved By   ▽+
Jana K Thompson (11)
Deborah Johnson (10)
Rebecca Lucke (6)
Dawn Seaver (3)   [more]

Status Flags   ▽+
With Errors (10)
With Lines Awarded From Sourcing (2)
With Attachments (2)

Custom Fields   ▽+
Account
Alternate Procurement Request
Date Payment Canceled
Department   [more]

Product Flags
♻ Recycled (4)

Form Type   ▽+
Services (85)
Check Request (11)

Requisition No.	Supplier(s)
2889415	AMAZON.COM STAPLES CONTRACT & COMMERCIAL
2889344	COCA-COLA BOTTLING COMPANY HIGH COUNTRY
2889135	AMAZON.COM NORBYS OFFICE SERVICES
2889130	AMAZON.COM NORBYS OFFICE SERVICES STAPLES CONTRACT & COMMERCIAL
2889170	NORBYS OFFICE SERVICES STAPLES CONTRACT & COMMERCIAL
2852483	NORBYS OFFICE SERVICES
2885791	GRAYBAR ELECTRIC COMPANY INC
2886901	INTERIOR MOVE CONSULTANTS,INC
2886169	WALKER PARKING CONSULTANTS
2883026	GRAYBAR ELECTRIC COMPANY INC LOWES HOME CENTERS INC
2881603	STAPLES CONTRACT & COMMERCIAL
2879765	MCMASTER-CARR SUPPLY CO
2872683	GENESEE SCIENTIFIC CORPORATION
2872623	BIO-RAD LABORATORIES INC
2872681	GENESEE SCIENTIFIC CORPORATION
2869356	VWR INTERNATIONAL LLC
2865340	QIAGEN INC
2850831	VWR INTERNATIONAL LLC
2852589	NORBYS OFFICE SERVICES
2852555	NORBYS OFFICE SERVICES
2852464	HALF BROTHERS BREWING COMPANY
2852367	Request New Supplier
2852396	HALF BROTHERS BREWING COMPANY
2852465	HALF BROTHERS BREWING COMPANY
2852400	HALF BROTHERS BREWING COMPANY Request New Supplier
2852523	HALF BROTHERS BREWING COMPANY
2852383	Request New Supplier
2852453	HALF BROTHERS BREWING COMPANY
2852504	HALF BROTHERS BREWING COMPANY
2852451	
2852498	
2852450	
2852500	HALF BROTHERS BREWING COMPANY
2852452	GRAYBAR ELECTRIC COMPANY INC HALF BROTHERS BREWING COMPANY
2852501	HALF BROTHERS BREWING COMPANY
2852454	HALF BROTHERS BREWING COMPANY
2852503	HALF BROTHERS BREWING COMPANY
2852495	HALF BROTHERS BREWING COMPANY
2852496	HALF BROTHERS BREWING COMPANY
2852443	HALF BR...
2852469	HALF...
2852364	Requ...
2852365	Requ...
2852366	Requ...
2852385	Request New Supplier

(4) This search can be filtered by all the criteria on the left.

(5) Department may be a common filter to use. Click on Department

84

Apply Custom Field Filter

Department | Is Exactly [v] | [   ] | Add another Department
           | **Is Exactly**   Select from all values...
           | Starts With
           | Is Between

[Save] [Close]
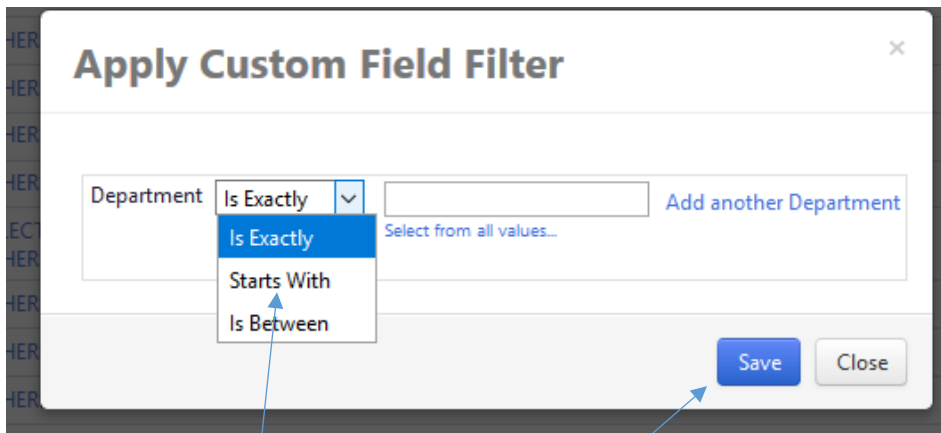
(6) Enter a specific department or choose a range and click **Save**

Orders ▸ Search ▸ Search Documents ▸ Document Search

‹ Back to Edit Search | Start New Search

Showing **1 - 19** of 19 Results   All Dates

Search Details   ?

Results Per Page [100 v]   Sort by: Best match

Requisition No.	Supplier(s)	Requisition Name
Saved Search:	Pending orders *(modified)*
⟳ 2886901	INTERIOR MOVE CONSULTANTS,INC	2020-02-07 0309796 01
Filtered by	⟳ 2886169	WALKER PARKING CONSULTANTS	2020-02-06 0309796 01
Type: Requisitions	⟳ 2881603	STAPLES CONTRACT & COMMERCIAL	2020-02-03 0478915 01
Date Range: All Dates	⟳ 2879765	MCMASTER-CARR SUPPLY CO	2020-01-30 0309796 03
[remove all]	⟳ 2843639	Abby's Lawn Service STAPLES CONTRACT & COMMERCIAL	2019-12-05 0140549 02
Workflow Status ☑ Pending	⟳ 2780551	BIO-RAD LABORATORIES INC	2019-10-08 0586649 01
Department ☑ Is Exactly: 3130	⟳ 2843380	CDW GOVERNMENT LLC	2019-12-05 0586649 01
	⟳ 2834041	BIO-RAD LABORATORIES INC	2019-11-20 request3 03
[Save Changes ▼] [Export Search]			2019-11-21 0399535 01
Save Changes			2019-10-16 0399535 02
Save New Search			2019-11-19 shopper5 01
Refine Search		COMMERCIAL	2019-08-19 david.krause 01
			Bid 2 8-15-2019
Type	⟳ 2713197	M.W. Watermark	2019-07-18 lynette.geatz 03
[Requisitions v]	⟳ 2711035	BIO-RAD LABORATORIES INC DELL MARKETING LP	2019-07-17 carl.iseminger 01
Date Range	⟳ 2699436	tonya's resort	2019-07-09 tonya.parton 01
[All Dates v]	⟳ 2694411	Al's Landscaping Services	2019-07-03 anna.leddige 02
	⟳ 2673544	Abby's Lawn Service	Landscaping services
Supplier ⛃	⟳ 2645332	Acme supplier	2019-05-02 david.krause 02
STAPLES CONTRACT & COMMERCIAL (3)	Results Per Page [100 v]

BIO-RAD LABORATORIES INC (3)
CDW GOVERNMENT LLC (2)
Abby's Lawn Service (2)   [more]

Current Workflow Step ⛃

Export Controls Approval (10)

(7) If you want to save the updated search, click the dropdown by Save Changes and select Save New Search

Add to Saved Searches

Step 1: Edit Saved Document Search Details

Nickname*   Department Open Orders

> Add Description

Step 2: Select Destination Folder

Top level personal folder
Top level shared folder
Subfolder of selected folder

❌ The destination folder is not select
and click Save Changes.

Add New ▲

▲ **Personal**

You have no personal searches.

▲ **Shared**

AP Saved Searches

UND Shared searches

Step 3: Select Export Template

Default Export Template   Screen Export ▾

* Required   Save   Close

(8) If you want to save the updated search, click the dropdown by Save Changes and select Save New Search Select a personal Folder

Create Personal Folder

Name*   Anna's Searchs

Description

254 characters remaining

* Required   Save Changes   Close

(9) Name it as you wish and click **Save Changes**

Add to Saved Searches

×

Step 1: Edit Saved Document Search Details

Nickname *

Department Open Orders

> Add Description

Step 2: Select Destination Folder

Add New ▲

◢ **Personal**

Anna's Searchs

◢ **Shared**

AP Saved Searches

UND Shared searches

Step 3: Select Export Template

Default Export Template

Screen Export

* Required

Save   Close

(10) Click Save

‹ Back to Edit Search | Start New Search

Showing **1 - 19** of 19 Results

Search Details | ?

Saved Search: **Department Open Orders**

Filtered by

Type: Requisitions
Date Range: All Dates

[remove all]

Workflow Status
☑ Pending
Department
☑ Is Exactly: 3130

[Save Changes ▼] [Export Search]

(11) The results of the search can be exported into a spreadsheet.
Click Export Search

Refine Search Results

Type

[Requisitions ▼]

Date Range

[All Dates ▼]

Supplier ▼

STAPLES CONTRACT & COMMERCIAL (3)
BIO-RAD LABORATORIES INC (3)
CDW GOVERNMENT LLC (2)
Abby's Lawn Service (2)   [more]

Results Per Page [100 ▼]

Requisition No.

🔁 2886901 🔍
🔁 2886169 🔍
🔁 2881603 🔍
🔁 2879765 🔍
🔁 2843639 🔍

🔁 2780551 🔍
🔁 2843380 🔍
🔁 2834041 🔍

🔁 2832622 🔍
🔁 2741377 🔍
🔁 2741213 🔍✅
🔁 2713197 🔍
🔁 2711035 🔍

🔁 2699436 🔍
🔁 2694411 🔍
🔁 2673544 🔍✅
🔁 2645332 🔍📎

Document Search Export

×

Request Export (Step 1 of 1)   ?

File Name *   [Pending Orders]

Description   [   ]

Request Export Template   [Transaction Export ∨]

Description   System Default Transaction Export

★ Required   [Submit]

(12) Input a File Name Click Submit

Request Submitted

×

The export request has been successfully submitted.

Pending and completed exports are available in:

Orders > Search > Download Export Files

Note: The time required to complete this export request depends upon the size of the request as well as the size and number of other pending requests.

[Go to Page: Download Export Files]   [Close]

(13) Click Go to Page: Download Export Files

All ▼   Search (Alt+Q)   🔍   🛒 0.00 USD   ♡ ⚑ 🔔 👤

Orders ▸ Search ▸ Download Export Files ▸ Search Results Exports

Download Exports   Recurring Exports

?

Exports with a status of 'Complete' are available to be downloaded. Exports with a status of 'Pending' are currently being queued by the system. The amount of time it takes to generate an export file will vary based on the amount of data being exported.

If you would like to receive a notification when your export is ready, make sure 'Search Result Export Confirmation' is selected in your Notification Preferences

⊞ Click to filter exports   ?   Remove Selected

Results Per Page [20 ∨]   **Results found: 1**   ◂ Page 1 of 1 ▸ ?

File Name	Description	Request Date / Time	Expiration Date	Export File Size	Export Status	☐
Pending Orders.zip		2/11/2020 2:20 PM	2/18/2020	7.0 KBytes	Completed	☐

⊞ Templates

Powered by JAGGAER | Privacy Policy

(14) Click the zip file Click OK

Forms and Links   ↻ ?

Opening Pending Orders.zip   ×

You have chosen to open:

  🗎 Pending Orders.zip
      which is: zip Archive
      from: https://usertest.sciquest.com

What should Firefox do with this file?

◉ Open with   [7-Zip File Manager (default)   ∨]
○ Save File

☐ Do this automatically for files like this from now on.

                              [OK]   [Cancel]

↻ ?

C:\Users\ANNA~1.LED\AppData\Local\Temp\Pending Orders.zip\

File   Edit   View   Favorites   Tools   Help

Add   Extract   Test   Copy   Move   Delete   Info

C:\Users\ANNA~1.LED\AppData\Local\Temp\Pending Orders.zip\

Name	Size	Packed Size	Modified	Created
Pending Orders.csv	35 095	6 093	2020-02-11 15:20	
Pending OrdersFormData_.csv		2	2020-02-11 15:20	

(14) Click CSV File

Pending Orders - Excel

File   Home   Insert   Page Layout   Formulas   Data   Review   View   Tell me what you want to do...

A1   PR ID

(15) Your output can be manipulated to meet your needs

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
1	PR ID	PR Date	Descriptic	External R	PR Name	Supplier I	Supplier N	Supplier N	PR Line ID	PR Line #	Consolida	Item Type	Form Type	SKU/Catal	Product D	Product Si	Quantity	Unit Price	Unit Price	Extended	List Price	List Price I	Current - :	Current - : Cu
2	2886901	2/7/2020 8:42			2020-02-0	1E+09	INTERIOR	185504	8606604	1 F		NonCatalc	Services		Consultant		1	10,000.00		10,000.00				
3	2886169	2/6/2020 19:32			2020-02-0	1E+09	WALKER P	176850	8604554	1 F		NonCatalc	Services		Consulting Services		1	10,000.00		10,000.00				
4	2881603	2/3/2020 9:11			2020-02-0	4059364	STAPLES C	13035	8591162	1 F		SQ Hosted Product		647748	Kensingto	1	1	27.2	########	27.2			22.95	########
5	2879765	1/30/2020 12:41			2020-01-3	4061989	McMaster	278	8586262	3 F		PunchOut Product		4880K822	Standard-Wall PVC P		8	0.67		5.36				
6	2879765	1/30/2020 12:41			2020-01-3	4061989	McMaster	278	8586261	2 F		PunchOut Product		5233K63	Clear Masterkleer Sc		500	0.37		185				
7	2879765	1/30/2020 12:41			2020-01-3	4061989	McMaster	278	8586260	1 F		PunchOut Product		9675T37	Odor-Resistant Plast		100	10.32		1,032.00				
8	2843639	12/5/2019 10:35			2019-12-0	4059364	Staples	13035	8486593								10	105.71	########	1,057.10			96.3	########
9	2843639	12/5/2019 10:35			2019-12-0	4059364	Staples	13035	8486592								1	59.99	########	59.99				
10	2843639	12/5/2019 10:35			2019-12-0	1E+09	Abby's Lawn Service		8486590								10	1,000.00		10,000.00				
11	2780551	12/5/2019 10:09			2019-10-0	8528	BIO-RAD L	7613	8485818								1	64	########	64			61	########
12	2780551	12/5/2019 10:09			2019-10-0	8528	BIO-RAD L	7613	8485804								1	61	########	61			58	########
13	2843380	12/5/2019 9:28			2019-12-0	4059764	CDW GOV	753	8485936								1	124.73		124.73				
14	2843380	12/5/2019 9:28			2019-12-0	4059764	CDW GOV	753	8485935								1	45.53		45.53				
15	2843380	12/5/2019 9:28			2019-12-0	4059764	CDW GOV	753	8485934								1	22.76		22.76				
16	2834041	11/21/2019 15:14			2019-11-2	8528	BIO-RAD L	7613	8462720				SQ Hosted Product		1265161C	Run 1x Polyacrd Unit		12	61	########	732				########
17	2834041	11/21/2019 15:14			2019-11-2	4059764	CDW GOV	753	8462665	3 F		PunchOut Product		3425138	Logitech H570e On E		1	46.52		46.52				
18	2834041	11/21/2019 15:14			2019-11-2	4059764	CDW GOV	753	8462667	5 F		PunchOut Product		2453060	Microsoft Wireless M		1	26.72		26.72				
19	2834041	11/21/2019 15:14			2019-11-2	4059764	CDW GOV	753	8462666	4 F		PunchOut Product		3846688	HP thin client to mol		1	79.19		79.19				
20	2834041	11/21/2019 15:14			2019-11-2	8528	BIO-RAD L	7613	8462719	1 F		SQ Hosted Product		1652416	O-Rings	5 Unit	12	13	########	156			12	########
21	2834590	11/21/2019 10:19			2019-11-2	3901	VWR INTE	7990	8461810	2 F		SQ Hosted Product		470094-54	COFFEE FI 1600 Item		1	112.45	########	112.45			109.21	########
22	2834590	11/21/2019 10:19			2019-11-2	126526	AMAZON.	1964	8461813	1 F		PunchOut Product		B071WWE	AmazonFresh Colom		1	15.1		15.1				
23	2787730	11/19/2019 16:07			2019-10-16	0399535	Olympus America		8456749	2 F		NonCatalc	Services			5 year service contra		5	12,000.00		60,000.00				
24	2787730	11/19/2019 16:07			2019-10-16	0399535	Olympus America		8456748	1 F		NonCatalc	Services		8299	Olympus Microscope		1	65,000.00		65,000.00				
25	2832622	11/19/2019 14:07			2019-11-1	126423	DIGI-KEY (	4302	8456489	1 F		PunchOut Product		36-8866-N	TIE CABLE 18LB 2.008		100	0.11		11.09				
26	2741377	8/19/2019 12:30			2019-08-1	4059364	Staples	13035	8199968	1 F		SQ Hosted Product		254268	Southwor	500	1	39.25	########	39.25			37.7	########
27	2741213	8/19/2019 8:55			Bid 2 8-15	1E+09	dave's company		8199444	1 F		NonCatalog Product			computer		1	100		100				
28	2713197	7/18/2019 9:03			2019-07-1	1E+09	M.W. Watermark		8110416	1 F		NonCatalc	Services		3383	Filter pres EA		1	19,750.00		19,750.00				
29	2711035	7/17/2019 8:33			2019-07-1	4050097	Dell	7793	8104531	2 F		PunchOut Product		365-0257;	Dell Standard 19 Incl		1	20		20				
30	2711035	7/17/2019 8:33			2019-07-1	8528	Bio-Rad La	7613	8104560	1 F		SQ Hosted Product		1650921	Thick Blot 25 Unit		1	74	########	74			70	########
31	2699436	7/16/2019 8:27			2019-07-0	1E+09	tonya's resort		8099268	1 F		NonCatalc	Services			bolts and EA		3	5,000.00		15,000.00				
32	2694411	7/3/2019 15:07			2019-07-0	1E+09	Al's Landscaping Serv		8058435	1 F		Contract NonCatalog		123	Widget 3		15	50		750				
33	2673544	6/3/2019 8:36			Landscapi	1E+09	Abby's Lawn Service		7998241	1 F		NonCatalog Product			Landscaping service:		1	89,000.00		89,000.00				
34	2645332	5/2/2019 11:04			2019-05-02	david.kra	Acme supplier		7921402	1 F		NonCatalc	Services			asdfasdfasfdasfd		10	10		100				

Alternate Procurement Requests

In-progress

Contract Requests

In progress

When to request a contract

1. **Complete this Contract Request when ALL the following apply:**

    A. Total Contract Value of the product/service exceeds $10,000 ($5,000 for IT/Software); AND

        i. Total Contract Value = initial cost + recurring costs and/or renewals over the life of the contract

    B. Purchase is **NOT** a one-time purchase; AND

    C. A procurement method has been completed (one of the following):

        i. Solicitation Completed (Bid/RFP/RFQ);

        ii. Alternate Procurement Request (APR) has been approved;

        iii. NDCC or Policy Exemption allowing purchase without a competitive solicitation; or

        iv. Emergency Purchase form has been completed and approved.

2. **DO NOT fill this out for:**

    A. One-time purchases;

    B. The Total contract value is less than $10,000 or $5,000 for IT/Software; or

    C. Contract Renewals or Contract Amendments.

    For one-time purchases, complete a Non-Catalog Order or Payment Request, depending on circumstances surrounding the purchase. See Jaggaer Manual or Videos for more details.

3. **IMPORTANT NOTES:**

    A. If the cost of the order is over $10,000, **DO NOT SIGN** anything until Procurement has approved the purchase or has directed you to sign;

    B. If there is an order form/agreement/contract/or any document requiring a signature or references Terms and Conditions, DO NOT SIGN ANYTHING until you have had them reviewed by General Counsel;

    C. Once legal reviews and all parties agree to the terms, and/or if procurement approves, verify the person signing the agreement for UND has authority to do so according to UND's Contractual Signature Policy.

Contracts

In progress

How to reference an existing contract in a non-catalog order or payment request

1. Complete the appropriate form (non-catalog or payment request) per usual until you get to the cart.
   a. If you are unsure on how to get to your cart or place an order, refer to the Jaggaer Manual.

2. Click on, "Select price or contract…." next to the item/form needing a contract reference.

3. Select the appropriate contract and click OK (the contract name is after the number).

   a. If you have multiple contract items from multiple contracts (one or multiple suppliers), each contract will need its own form. Likewise, if items are being purchased that are not part of a contract, a separate non-catalog order/payment request will need to be created for the non-contract items.

      i. e.g., I have 2 contracts with company A and 1 contract with company B. I will enter one non-catalog order/payment request for each contract with company A and one non-catalog order/payment request for company B. If I wish to order additional items from either company, unrelated to a contract, I will need to submit an additional non-catalog order/payment request with the non-contract items on it.

4. You should now see the contract number referenced on the line level.

5. Continue with your order as usual.

How to search for a contract

1. Locate the contract medallion on the left hand navigation menu, and navigate to "**Search Contracts**." (Medallion → Contracts → Search Contracts).
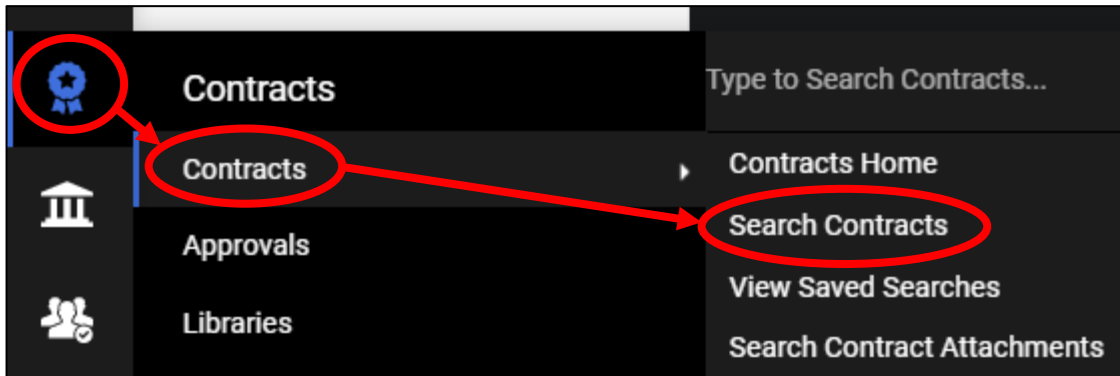
2. You can search under "simple search", or for more search options, you can select "Advanced Search."
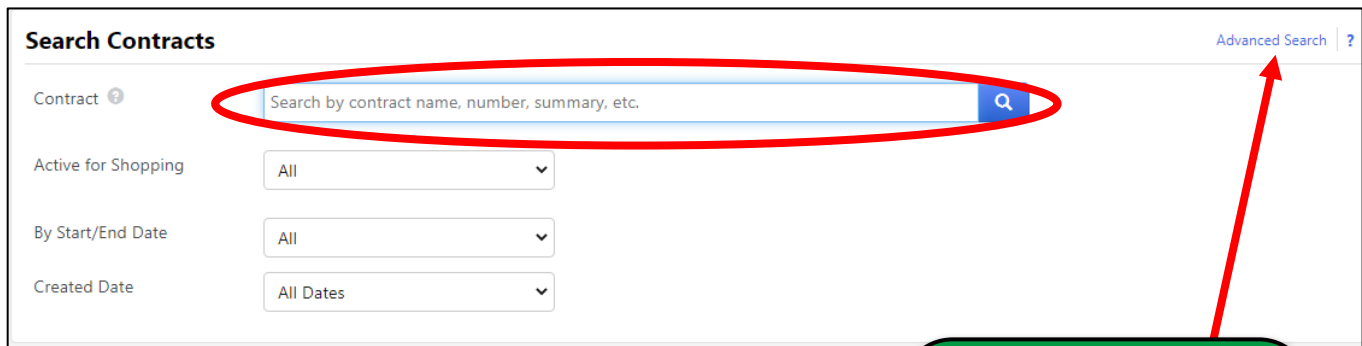
> **TIP**
> For more search options, use the "**Advanced Search**" feature, which allows you to search by Supplier Name, Dates, Value, Solicitation Number, Department, amongst other options.

ADDITIONAL QUICK SEARCH OPTIONS

1. Locate the search bar in the top right of Jaggaer's home page and type in the contract number, contract name, or supplier and hit "ENTER."
   a. Depending on your search, you may get multiple results in addition to the contract searched.
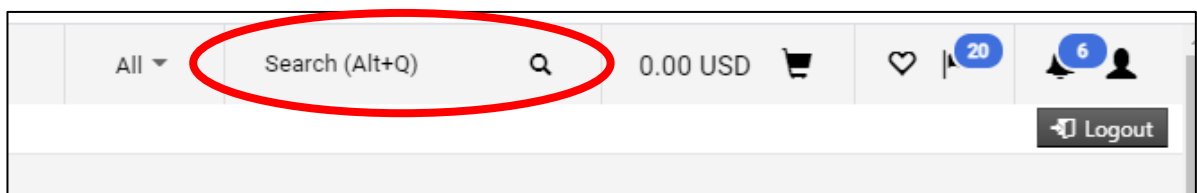
2. Under the Contracts Medallion, you will find a box that says, "Type to Search Contracts…" where you can type in a search option (Contract name, number, & supplier) similar to the option listed above in #1 and hit "ENTER."
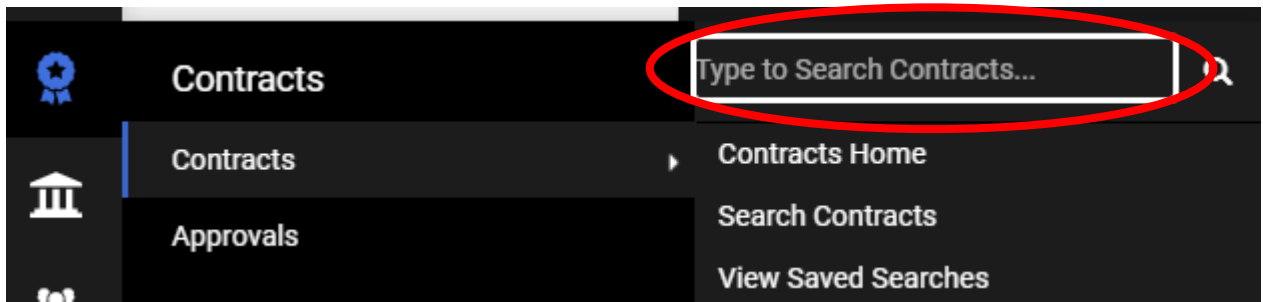
NEW - Order Status and Shipping Information

Please note, if there is ever a question on your order status, contacting the supplier directly is acceptable and encouraged.

The following suppliers do not have order updates and/or shipping information. You will need to follow up with them directly for order status updates.

- **Abcam** – contact information is provided on their punchout site
- **Boeing** - contact information is provided on their supplier page in Jaggaer under contacts
- **Border State Industries** – contact information is provided on their punchout site
- **Cullinex** (Plexus) – contact information is provided on their supplier page in Jaggaer under contacts
- **Norby's** – contact information is provided on their supplier page in Jaggaer under contacts
- **Qiagen** - contact information is provided on their punchout site
- **Sigma-Aldrich -** contact information is provided on their punchout site

The follow suppliers contain order status and/or shipping information on their punchout sites.

Airgas

1. Navigate to the Airgas PunchOut site.
2. Click on "Order History"
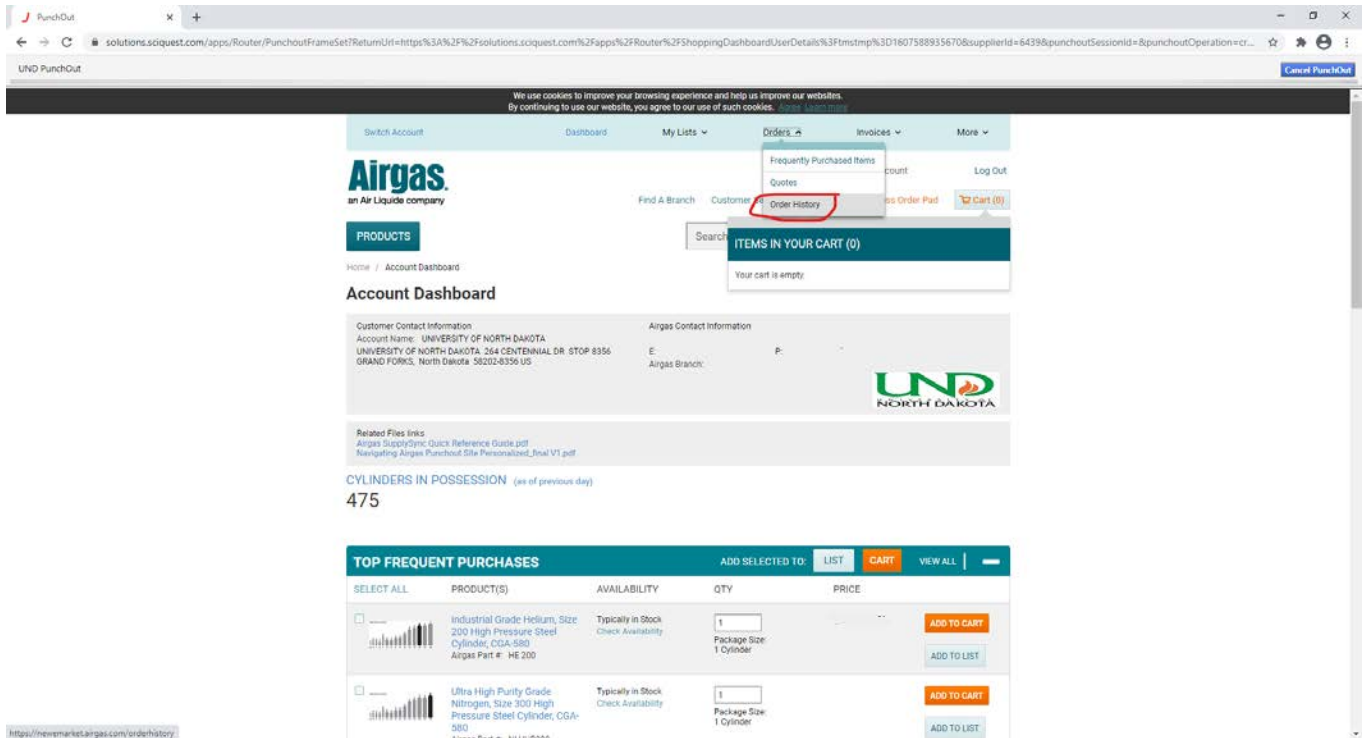
3. Select the "Search by Order Number" drop down and select the "Search by Purchase Order"
4. Enter your purchase order number
5. Enter the proper "Date Range" for your order
6. Click Search
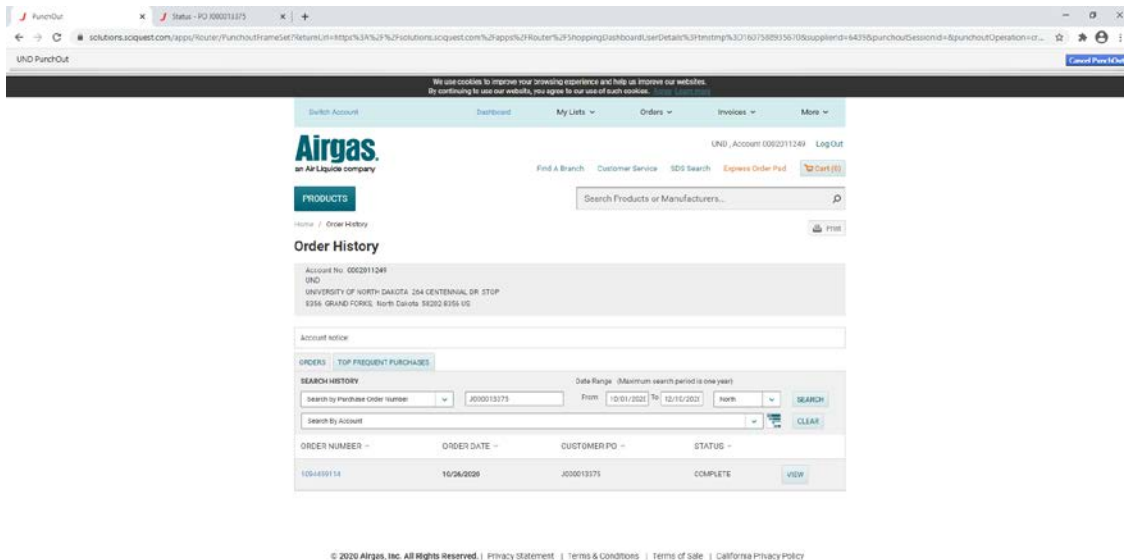
Amazon

1. Navigate to the Amazon punchout site
2. Hover over the "Hello (your name)" and click "Your Orders"
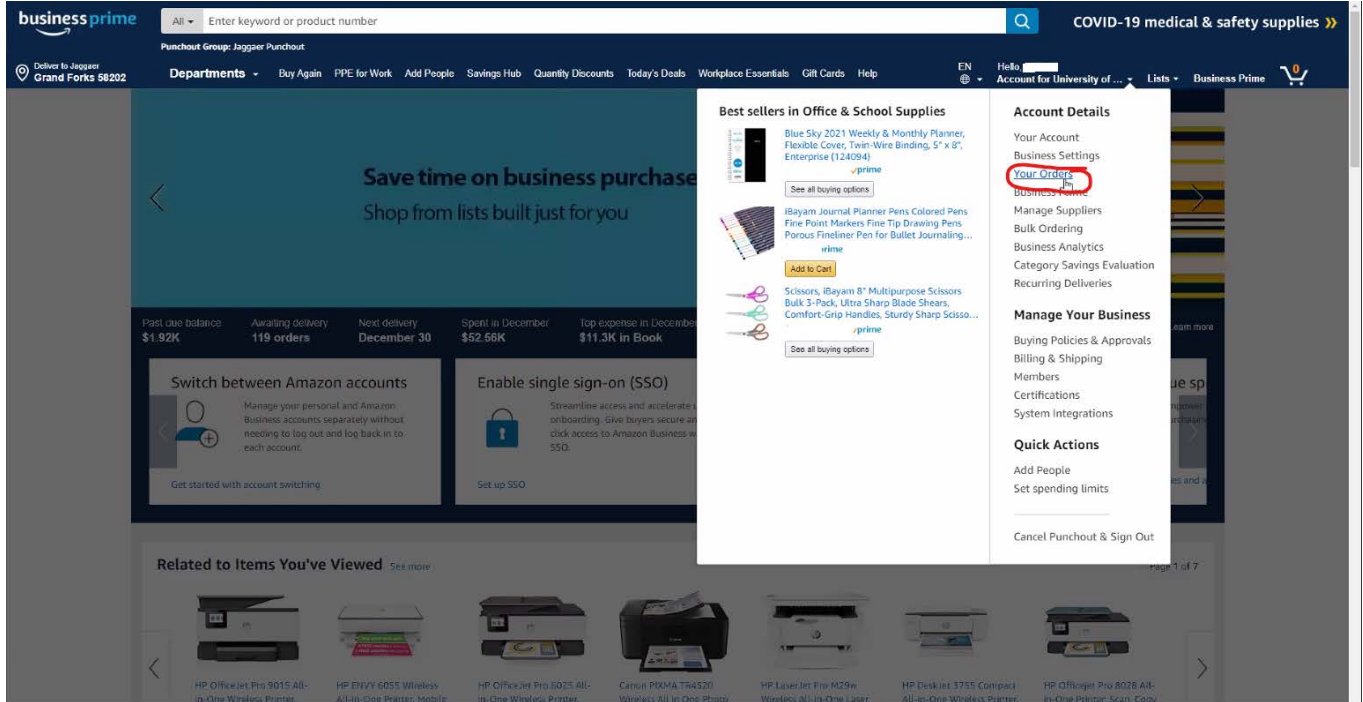
3. Enter the correct time range your order was placed and which orders you want to view
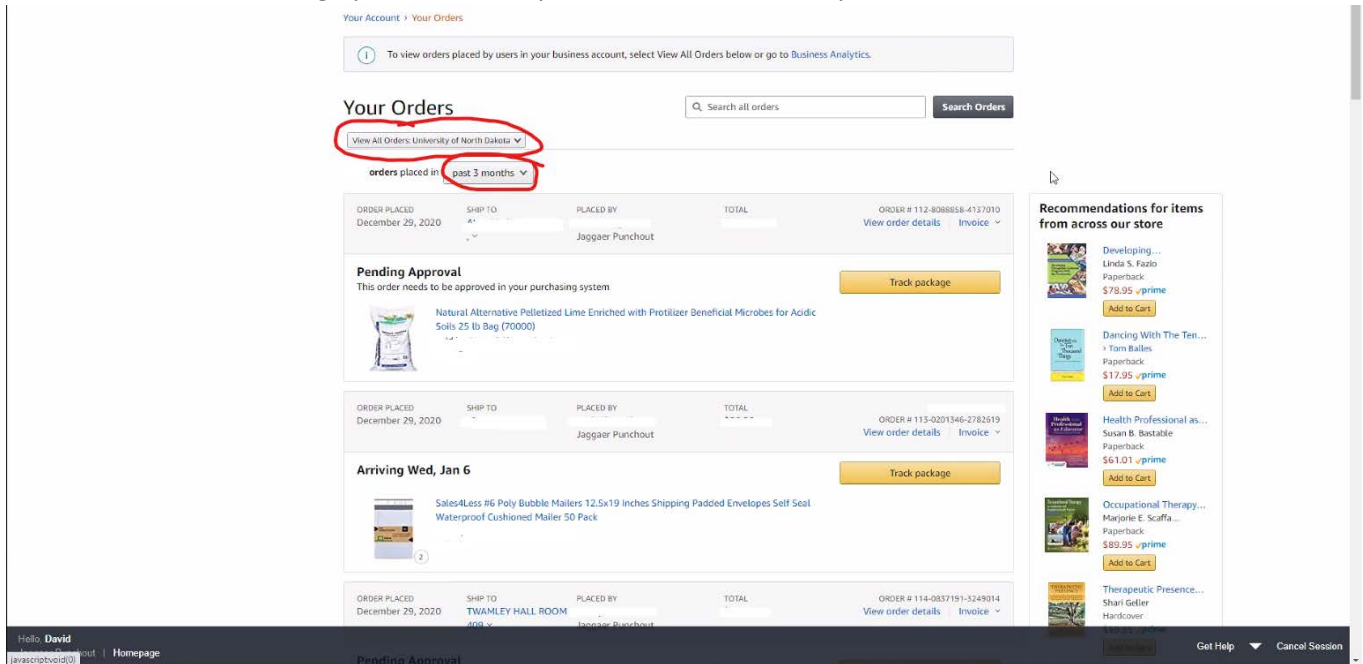
B&H

1. Navigate to the B&H PunchOut site
2. Click the "Orders & Quotes"
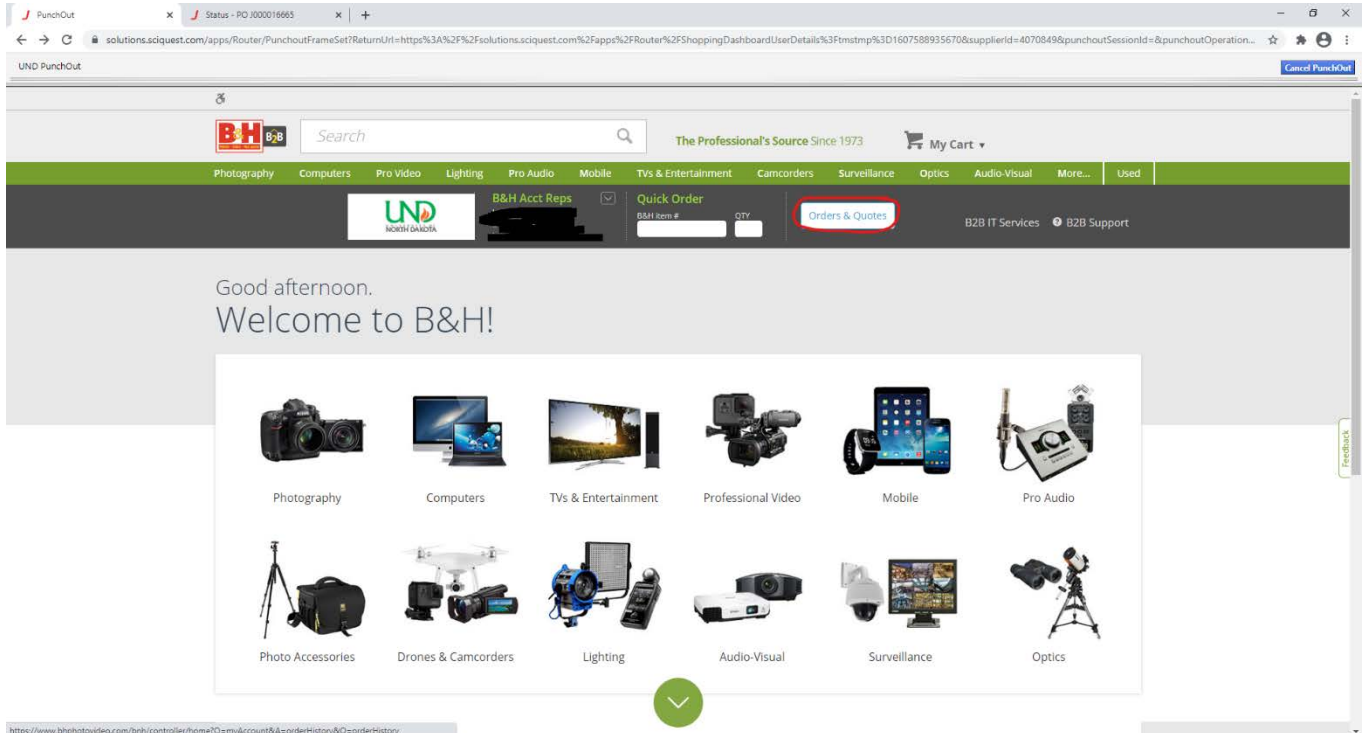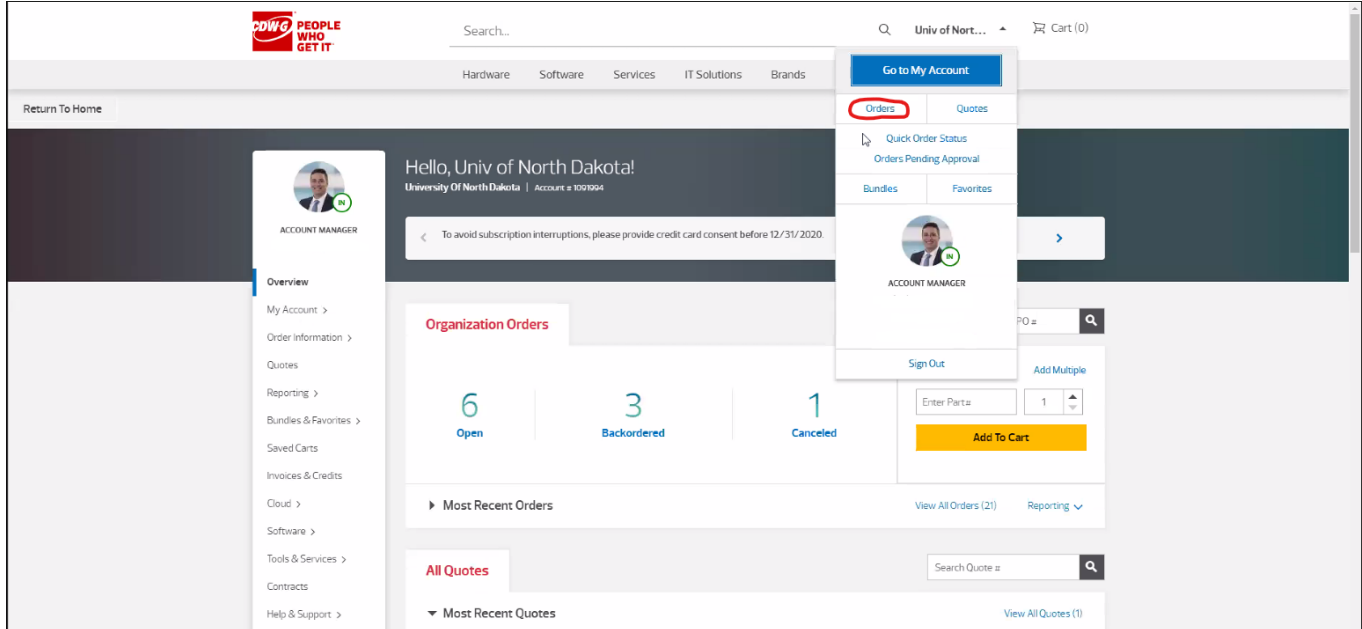
3. Enter your phone number and your Purchase Order number
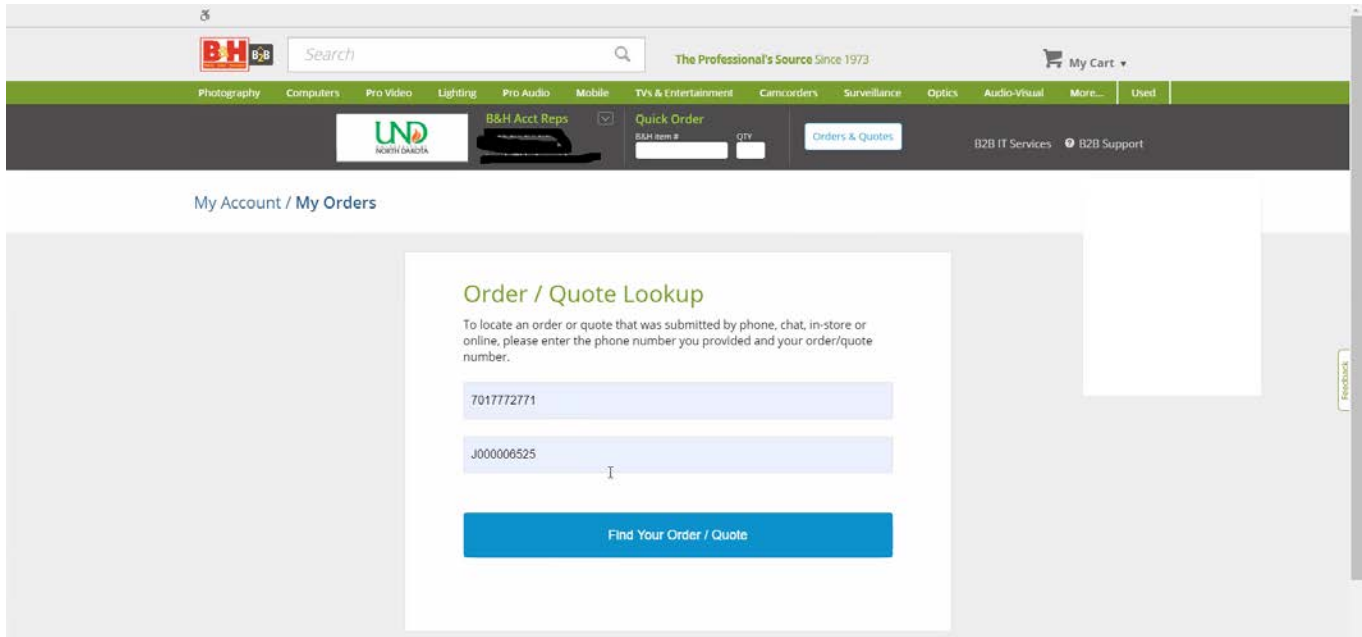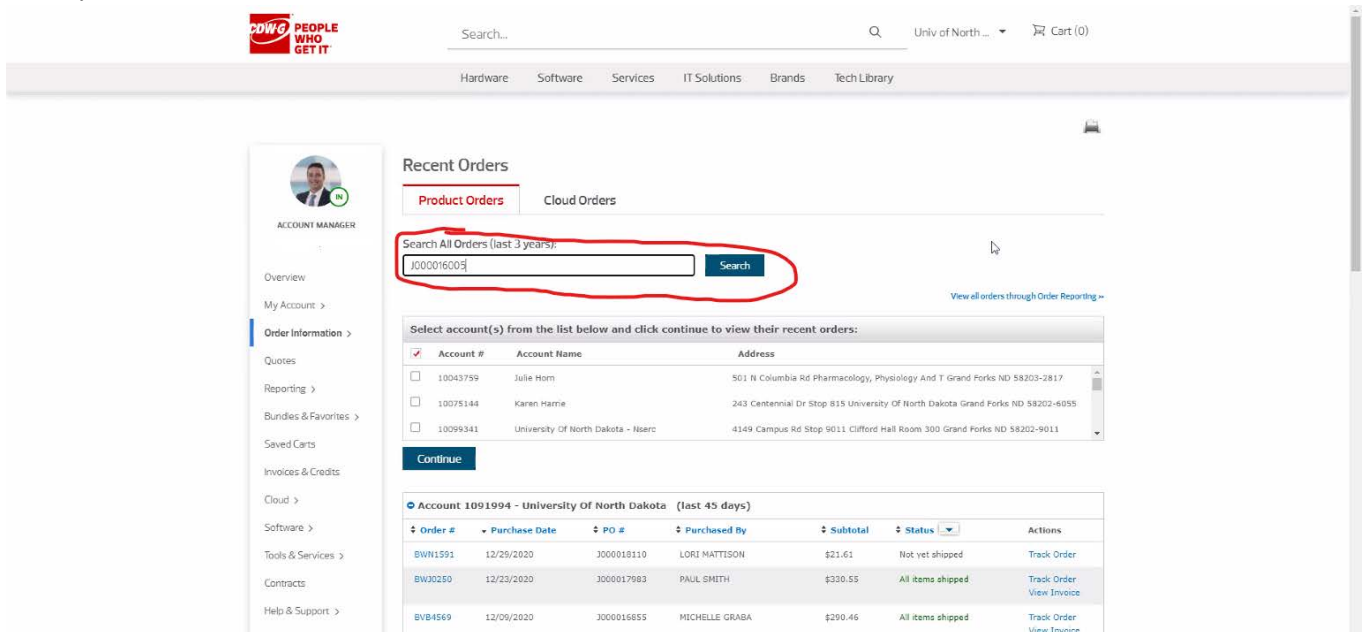
CDW Government LLC

1. Navigate to the CDW PunchOut site
2. Hover over your name and click "Orders"

3. Enter your PO number in the field and click "Search"

Dell

1. Navigate to the Dell PunchOut site
2. Click the "Order Status" button
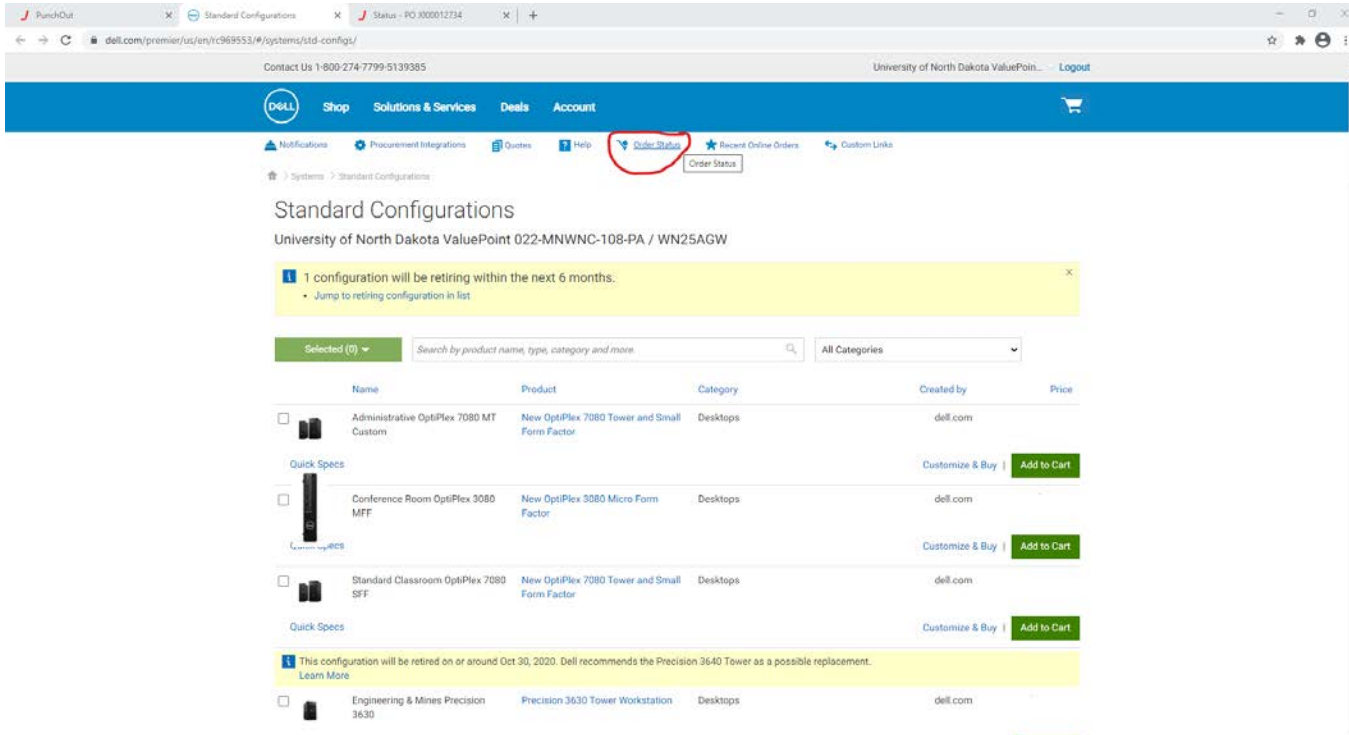
3. Enter your purchase number into the "PO Number" field
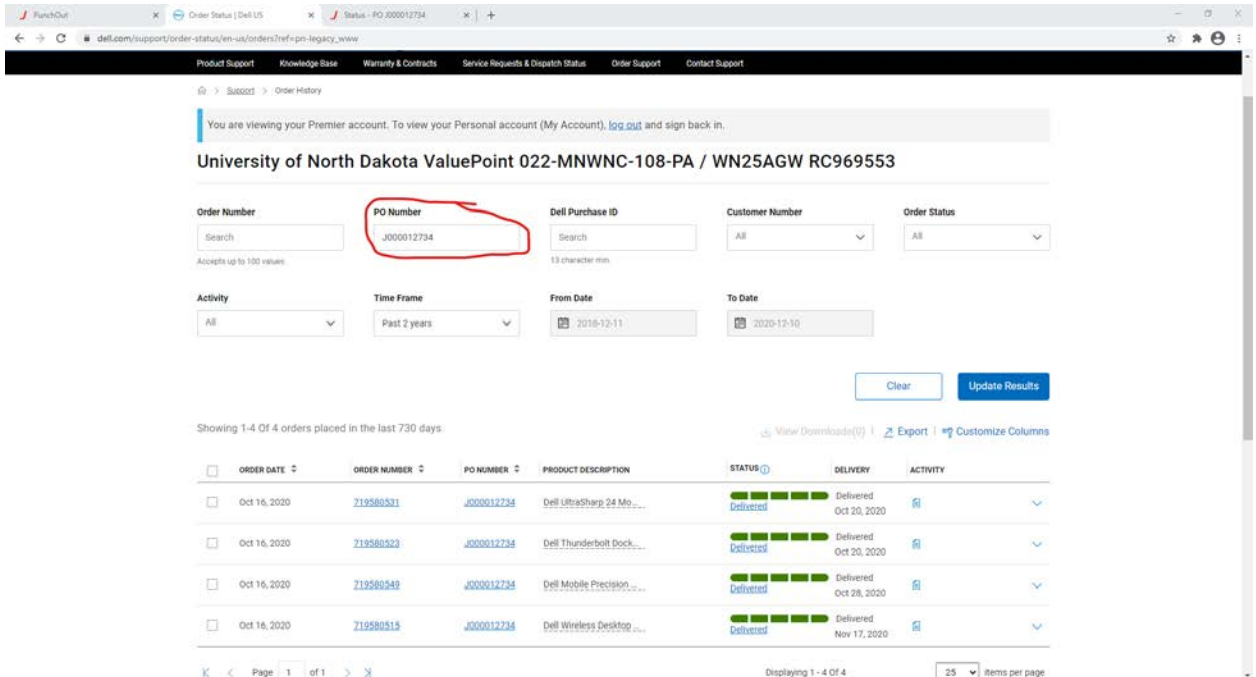
4. Your orders will appear on the bottom with a "Delivered" link that takes you to tracking

Fisher Scientific Industries

1. Click on your PO number in Jaggaer to view the status
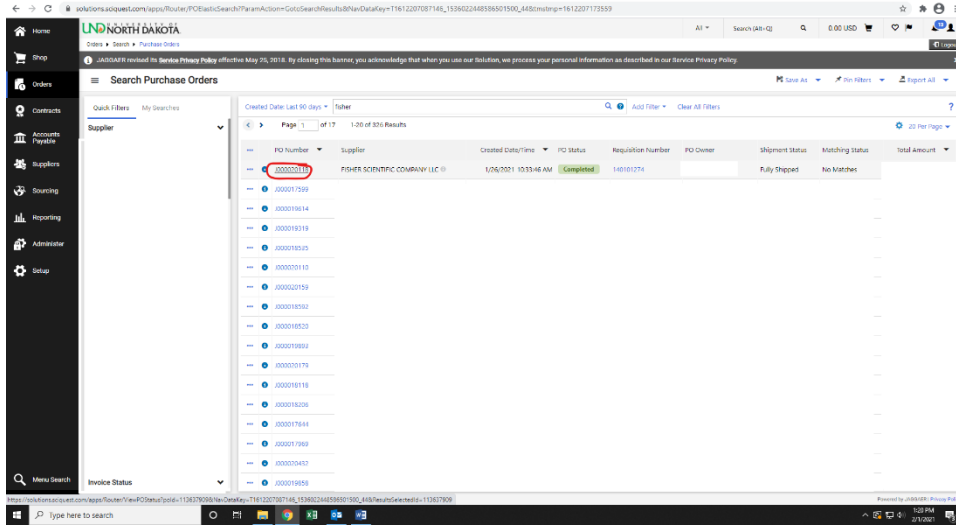
2. From there you can click on the "Shipments" button to view shipping
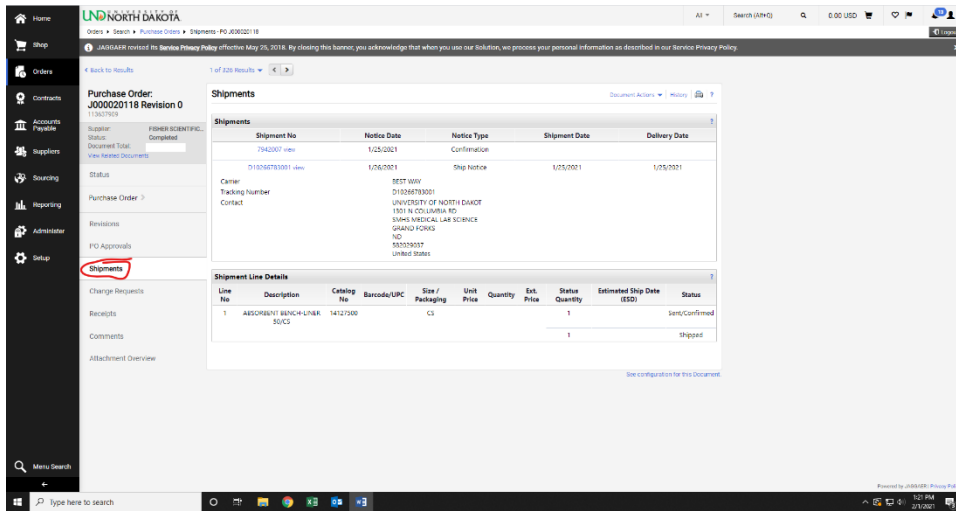
Alternative

1. Navigate to the Fisher Scientific Industries PunchOut site
2. Click the "Order Status" button
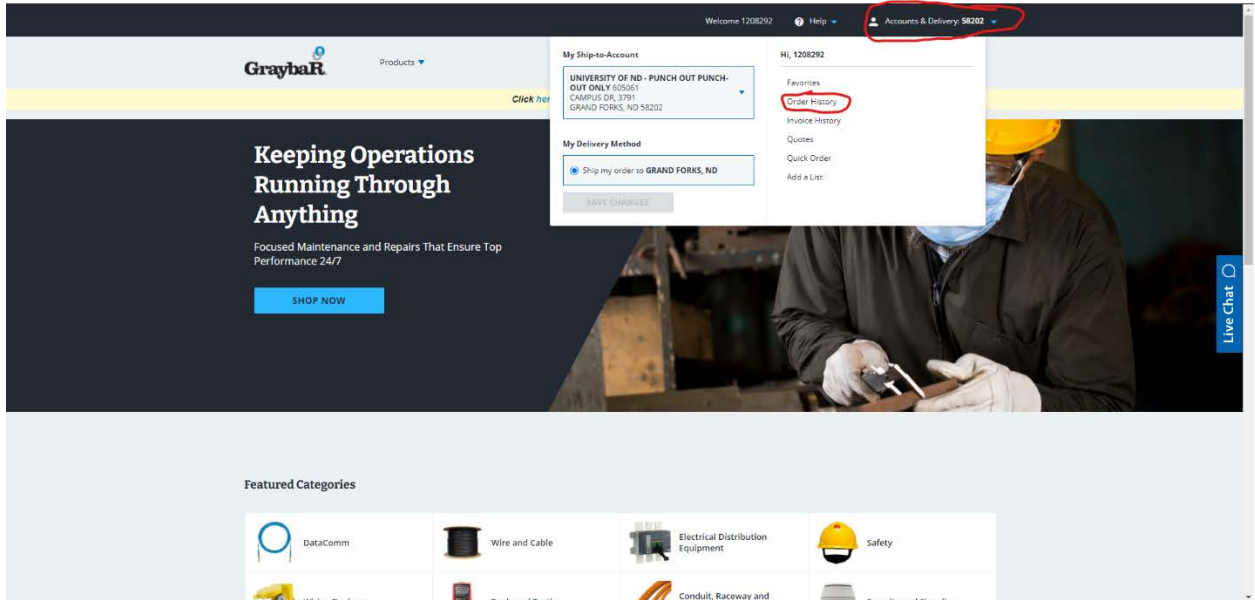
3. Enter your purchase number in the "Search" field

4. You can click "View Details" to see tracking info

GraybaR

1. Navigate to the GraybaR punchout site
2. Click the arrow next your zip code number and click the "Order history"

Innovative Office Solutions LLC

1. Navigate to the Innovative office Solutions PunchOut site.
2. Hover over the "My Account" and click the "My Account" button
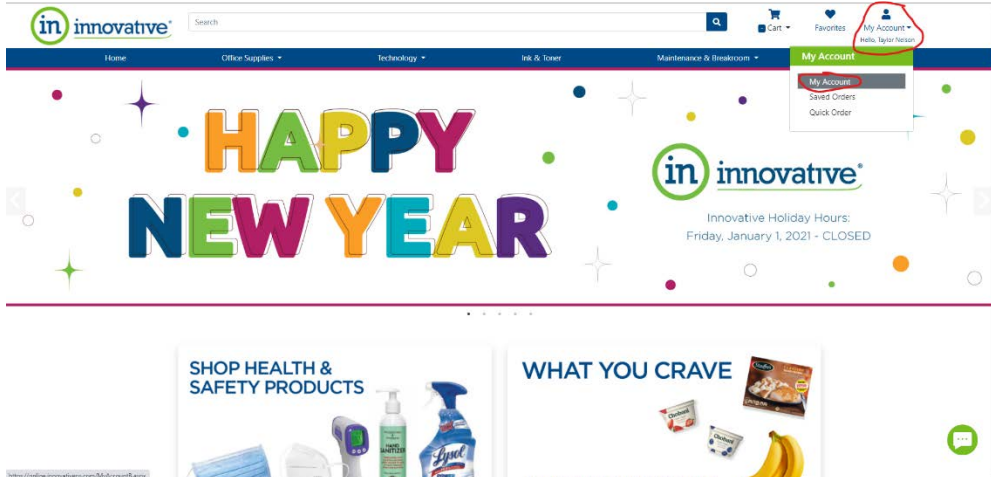
3. Click the "View Orders, Invoices & Quotes" button
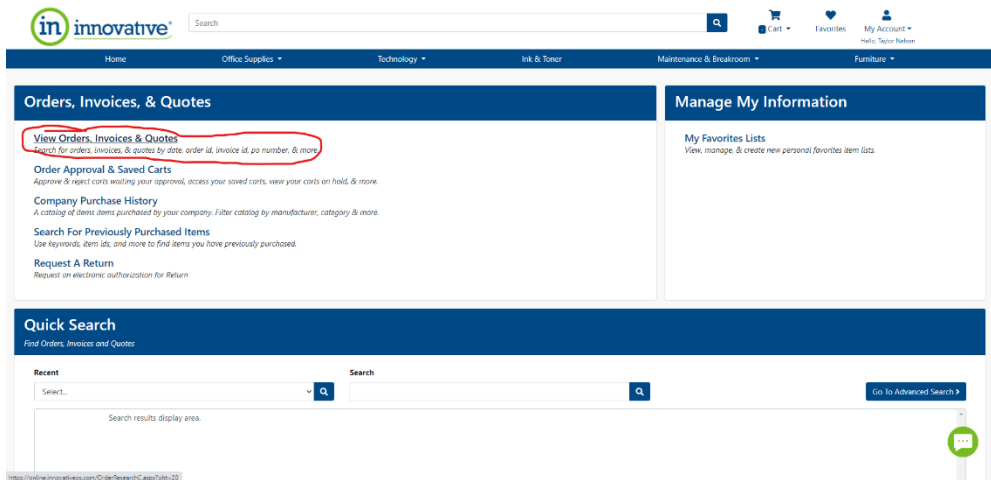
4. Enter the proper date range and click search
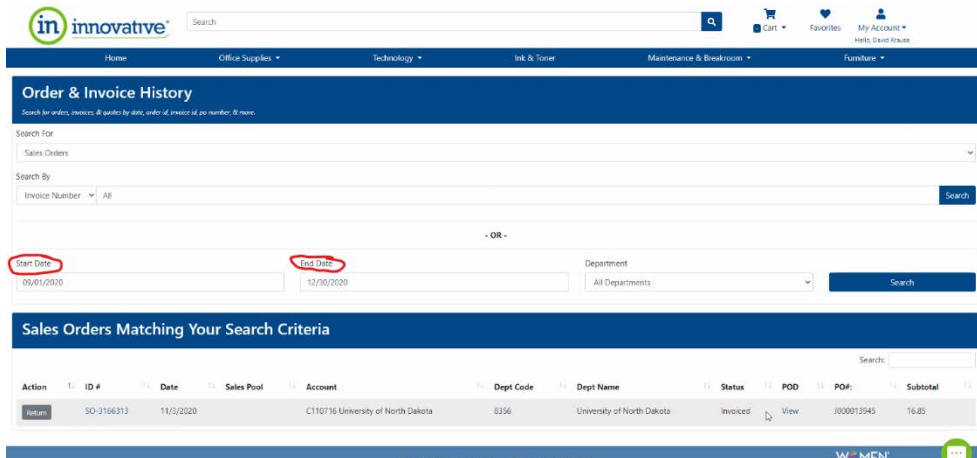
Lowes

1. Lowe's will send an email to you.
2. Click the "Check Order Status" button

3. Enter your email and order number.

4. You'll be redirected to the Order Details page where you can view the status of your order.

Order Details

PRINT

Order Details

Order Date:	01/13/2021	Order #:	429505232	Total:

Truck Delivery

Delivery (1 of 1)

RESCHEDULE DELIVERY

Ready For Delivery

Scheduled Delivery: January 29, 2021 | 12:00pm - 4:00pm CT

		Unit Price	Quantity	Total
	30-in 4 Elements 4.8-cu ft Freestanding Electric Range (White) Item #: 1957070	Model #: WFC150M0JW			

Payment Information

Subtotal:	
Truck Delivery:	FREE
Tax:	$0.00
Total:	

McKesson

1. Navigate to the McKeeson punchOut site
2. Hover over the Home button and click the "Check Order Status"
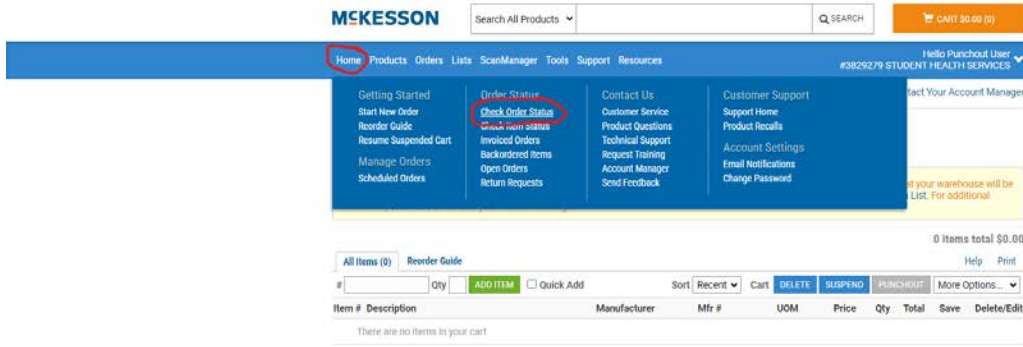
3. The Tracking information should be there for you to track.

McMaster-Carr
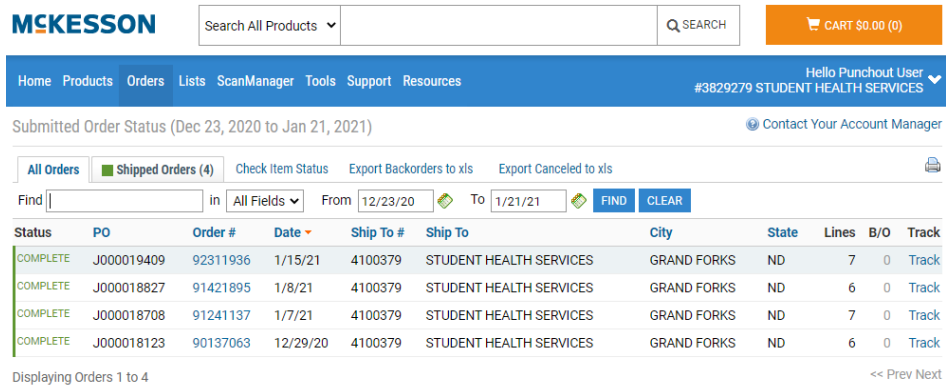
1. Login and navigate to the "Activity" button
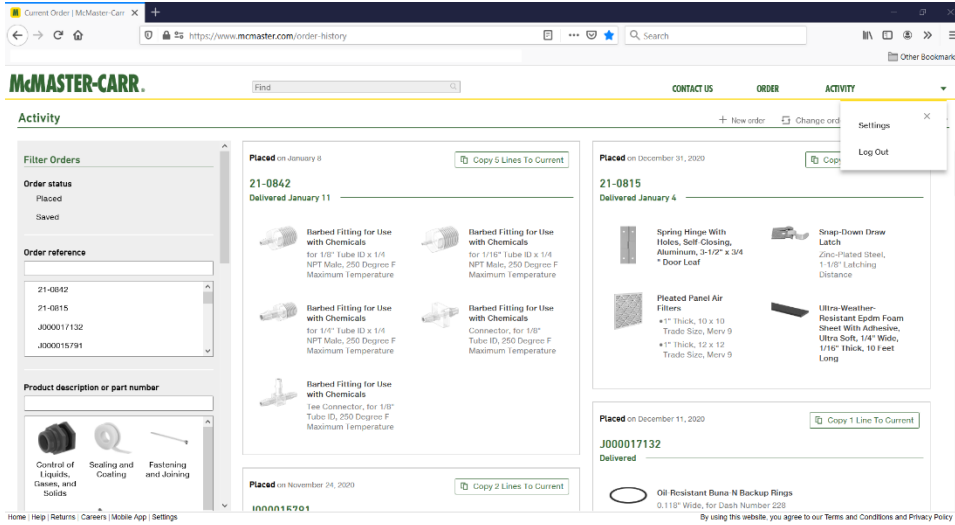
2. See order details and tracking number on this page.
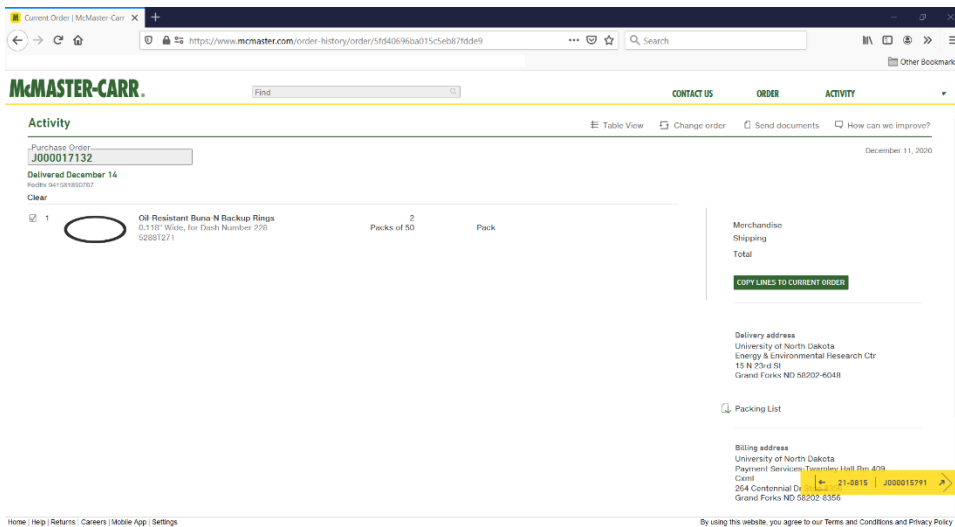
Office Depot

1. Navigate to the Office Depot punchout site
2. Hover over the "1" in the circle, hover over the "orders" button, and click the "Order Tracking" button
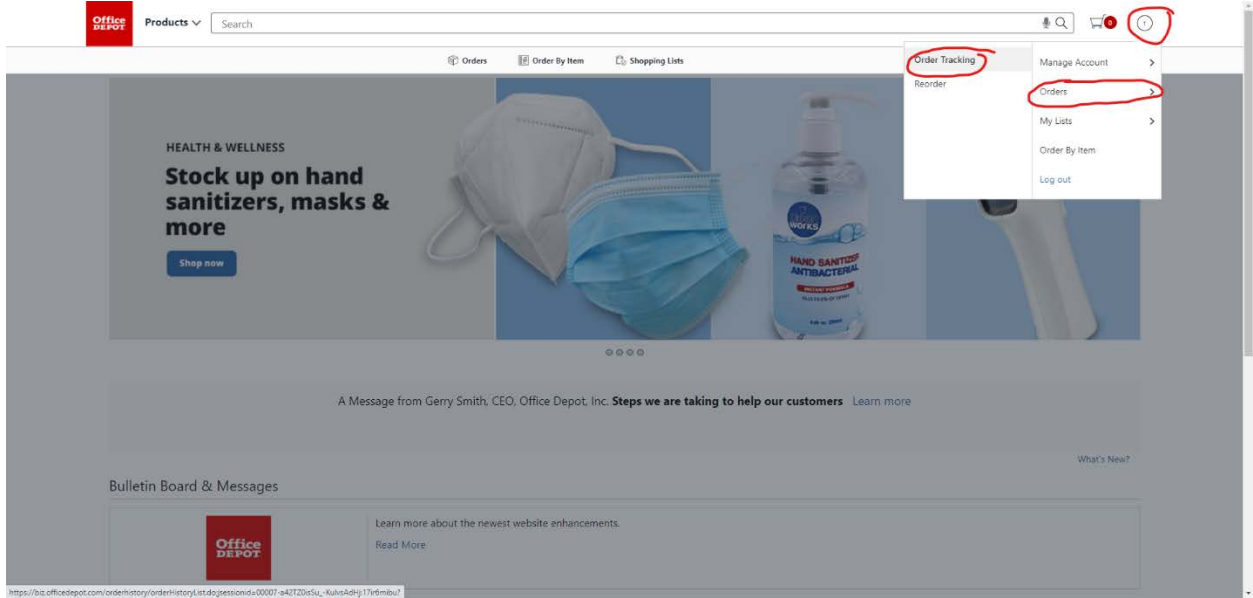
3. Scroll down and you can see all of your orders

4. Click on an "Order Number" to view your order information

5. From there you can click "Track Your Shipment"

Staples

1. Click on your PO number in Jaggaer to view the status
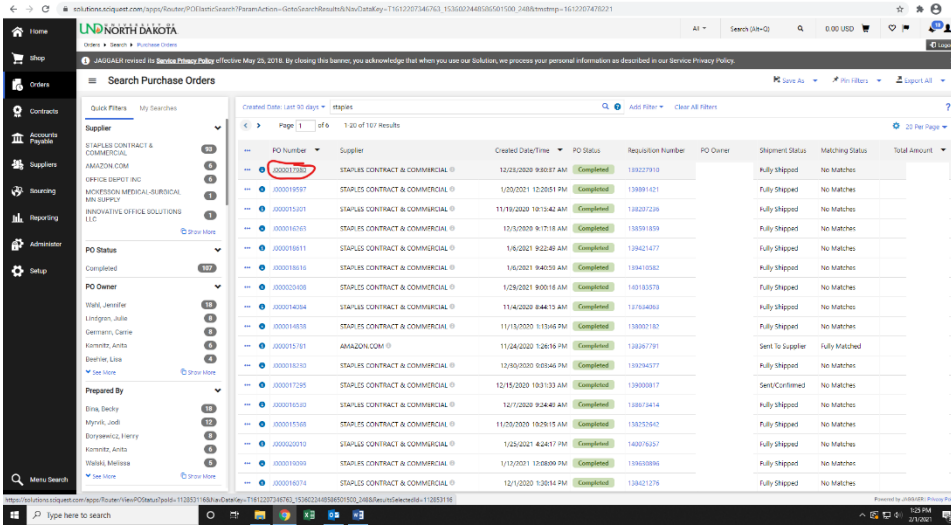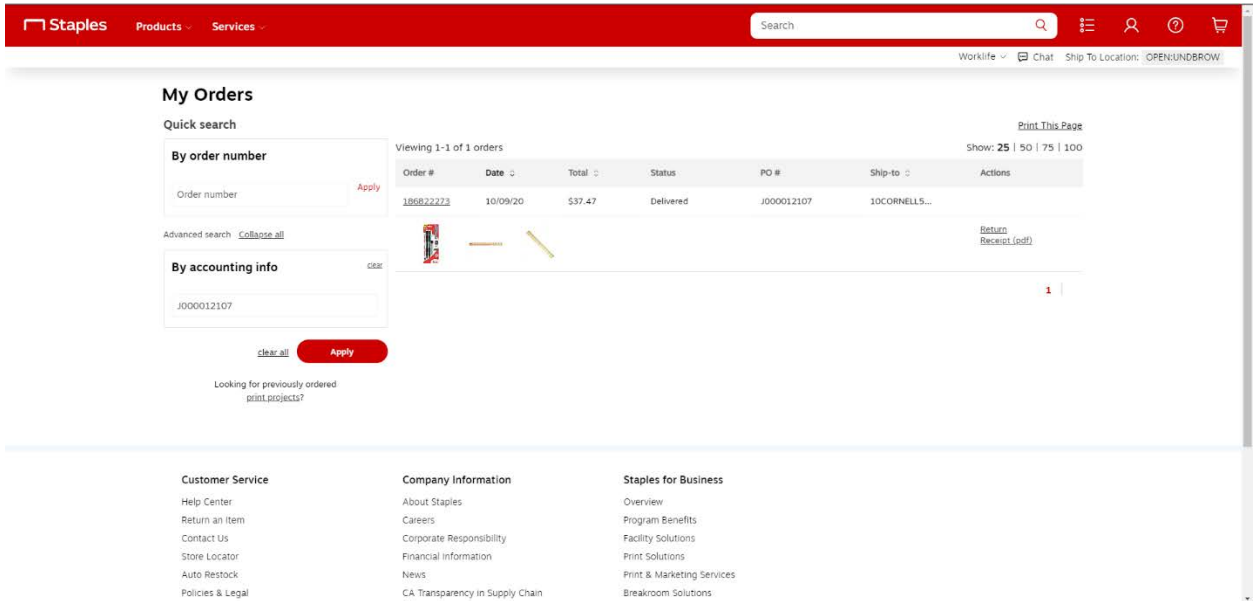

2. Click the "shipments" button
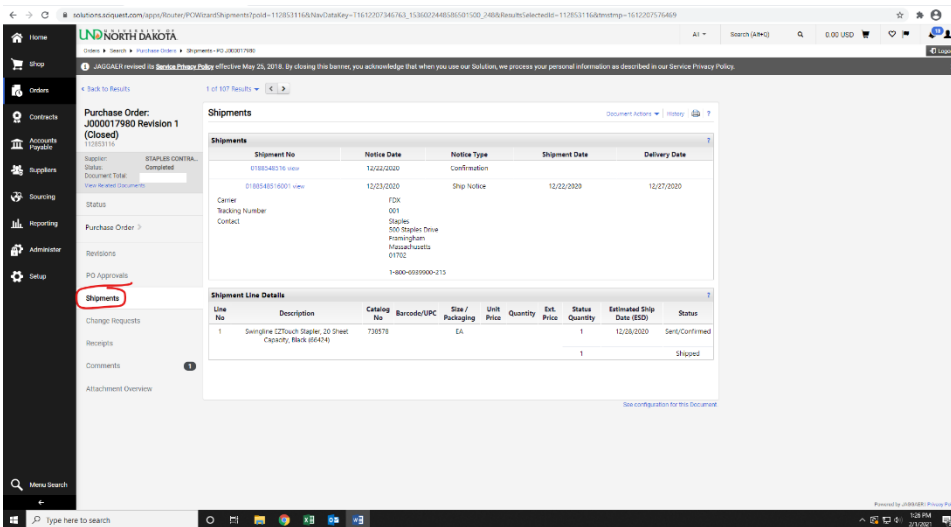
Alternative

3. Navigate to the Staples punchout site
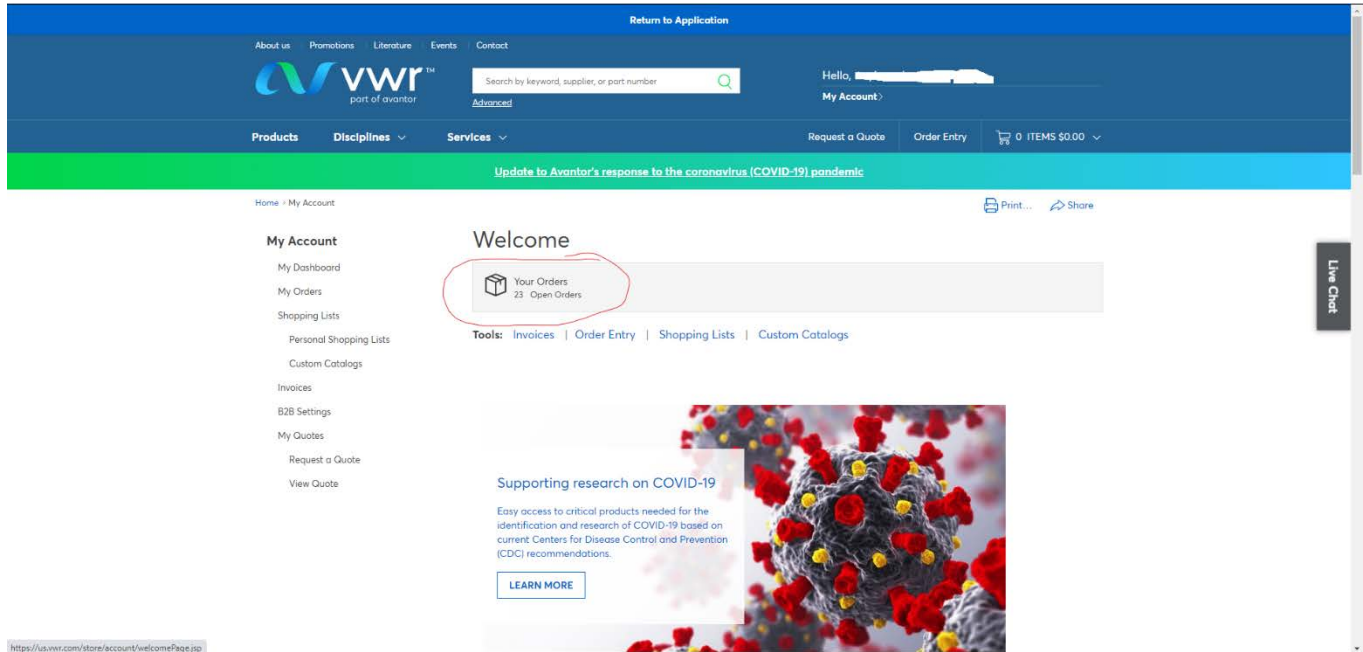4. Click the person button and click "my order"
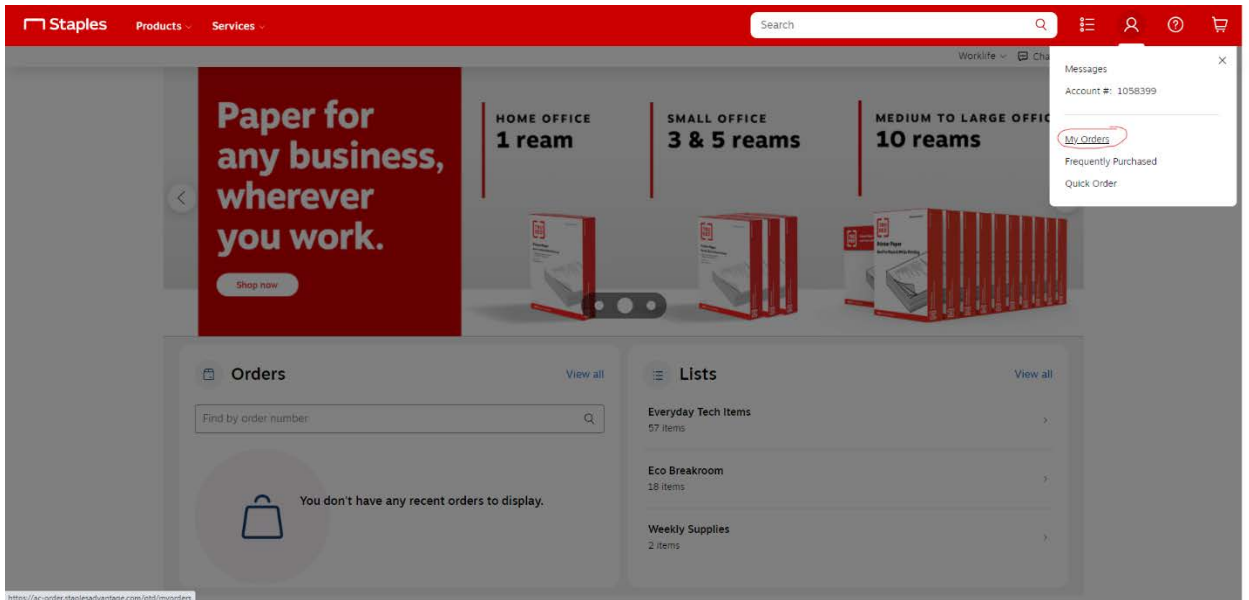
5. Enter your order or purchase number and click "apply" to view your order

VWR International

1. Navigate to the VWR International punchOut site
2. Click the "Your Orders" button to view all of your previous orders

3. If the button isn't there for you, hover over the "my account" button and click "my orders"