JAGGAER REQUESTER CHECKLIST

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

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

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

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

☐ Create receipt
☐ Select quantity for goods or quantity or cost for services
☐ Input the date you physically received the items
☐ Complete
JAGGAER APPROVER CHECKLIST

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

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

NOTES
☐ Departments are responsible to make sure invoices are received from suppliers
☐ Invoices can be emailed to UND.invoices@edmgroup.com
☐ Statements should be emailed to apinvoice@und.edu and will be forwarded to the appropriate department. UND does not pay off of statements.