**Getting Started**

**Access:**  [https://und.edu/jaggaer](https://und.edu/jaggaer)  
Enter your NDUS account user name & password.

**Navigation Pane**

- **Home icon** - The Home icon brings you back to the main shopping page.
- **Shop icon** - The Shop icon provides you access to the shopping options and carts.
- **Documents icon** - The Documents icon allows you to search orders and invoices.

**Shopping Options**

1. **Search using the search bar in Jaggaer**
   - [Product Keywords, Description, Supplier, Manufacturer]

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

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

**Definitions**

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

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

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

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

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

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

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

- **Receipt** – electronic record that items are received.

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

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

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

- **Commodity Codes** - a code which categorizes the product or service being purchased. UND uses UNSPSC codes. Codes are used for approval routing, spend analysis, and supplier classification.
Assigning a Cart - next steps after creating a cart

- **Note:** those without the requester role need to assign their cart to a requester.
- **Who is my requester?** Ask your department administrative staff.

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

1. Complete any sections within the cart at the direction of your department's procedures.
   -- Sections with empty mandatory fields are indicated with a grey checkmark.
   -- Mandatory fields are highlighted.
   --- Click on the hyperlink to complete the required section.

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

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

**Checkout**

**Assign Cart**

**Where's my order?**

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

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

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

**Requisitions**

- **Required**
- **no value**

- **Assign To:**
  - no value
  - SELECT
  - SEARCH

**Assigned Carts**

**Other situations**

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

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

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

- **I need to return items** - notify the supplier on the return and advise your admin staff to update the order's receipt.

- **I have an invoice what do I do?** - invoices received that do not have a purchase order are to be paid using the payment request form.

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

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

**Other Items**

- Training manuals and Videos – [https://campus.und.edu/finance/training.html#procurement](https://campus.und.edu/finance/training.html#procurement)

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

**Approver Actions**

- **Note:** Approvers are hard coded into the requisition workflow based in UND's or the department's business rules and requirements.

- Approvers can approve from 3 ways.

1. Log into Jaggaer and view your action items and select "Requisitions to Approve"
2. Click on the link at the bottom of the email that you receive.
3. Setup a pin number under your profile to approve from your email. See the Jaggaer Manual for setup.

**To Approve...**

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