# Jaggaer Training Manual

**Last Updated:** 4/9/2021 3:14:00 PM

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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](http://www.und.edu/jaggaer)

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

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

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

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.

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

**Tip:**

- The **Shop** icon provides you access to the shopping options and carts.
- The **Contract** icon allows you to view University Contracts.
- The **Suppliers** icon allows you to search for current suppliers.
- The **Reporting** icon allows you access to reports based on role.
Quick Reference Guides
Jaggaer Quick Reference Guide
Jaggaer RMM Quick Reference Guide
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*

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**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.

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.

- **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.
  - 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.
  - 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-out 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

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

(6) Select Add to Cart

(7) Select the Cart icon at the top and select View Cart
TIP: Requestors who shop can select **Proceed to Checkout**

(9) Select Assign Cart

(10) Select the appropriate Assignee

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

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

(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 supplier's search bar.

(4) Add your item to the cart and click the checkout 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.
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**

Complete this form if product or service is not found in the catalogs and a competitive solicitation is not being completed.

If the purchase is greater than $10,000 and you intend to complete a competitive solicitation then please complete the “Request Sourcing Event” form on the shopping home page under the “quick links” tile.

Please attach quotes, contract, and any other supporting documentation on the attachment page.
(3) **Suppliers** section provides the supplier information. Enter the Supplier name and click Search.

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

(6) Select **Upload**

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

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

(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.

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

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

(16) Select 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.

(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.
(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.

(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’

(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.
(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.

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.


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
(2) Choose the appropriate cart

(3) Click Proceed to Checkout

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

(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 work order, add that information. Most departments will not populate this field

Click Save

<table>
<thead>
<tr>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cart Name</td>
</tr>
<tr>
<td>Description</td>
</tr>
<tr>
<td>Priority</td>
</tr>
<tr>
<td>Prepared by</td>
</tr>
<tr>
<td>Prepared for</td>
</tr>
<tr>
<td>Business Purpose</td>
</tr>
<tr>
<td>IT Non-Standard Tracking Number</td>
</tr>
<tr>
<td>Software Name</td>
</tr>
<tr>
<td>IT Non-Standard</td>
</tr>
<tr>
<td>Alternate Procurement Request</td>
</tr>
<tr>
<td>Supplier Order ID</td>
</tr>
<tr>
<td>Work Order Number</td>
</tr>
</tbody>
</table>
(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.

(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
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.

<table>
<thead>
<tr>
<th>Shipping address</th>
<th>select from org addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attn: *</td>
<td>Anna Laddige</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>141 Facilities</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>3701 Campus Road</td>
</tr>
<tr>
<td>City</td>
<td>Grand Forks</td>
</tr>
<tr>
<td>State</td>
<td>ND</td>
</tr>
<tr>
<td>Zip Code</td>
<td>58202-8008</td>
</tr>
<tr>
<td>Country</td>
<td>United States</td>
</tr>
</tbody>
</table>

(9) Click Save

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.

(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**.

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

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.
(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.
(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**.

(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.
(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**.

(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**.

(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**.
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.

(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.
(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.

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

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

TIP: To determine who will approve the order, click View Approvers under each approval workflow step.
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 Cart on the left hand side
   Select My Carts and Orders
   Select View Carts

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

(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 Jane 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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folder</td>
<td>Department Approval - 3130</td>
</tr>
<tr>
<td>Prepared by</td>
<td>Anne Ledidge</td>
</tr>
<tr>
<td>Prepared for</td>
<td></td>
</tr>
<tr>
<td>Cart Name</td>
<td>2023-01-31 request2 01</td>
</tr>
<tr>
<td>Requisition No.</td>
<td>2881241</td>
</tr>
<tr>
<td>Priority</td>
<td>Normal</td>
</tr>
<tr>
<td>No. of line items</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>10.49 USD</td>
</tr>
</tbody>
</table>

### Details

**AMAZON.COM**

<table>
<thead>
<tr>
<th>Item 1</th>
<th>Description</th>
<th>Catalog Number</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Ext. Price</th>
<th>Size/Packaging</th>
<th>Commodity Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item 1</td>
<td>PILOT G2 Premium Retractable &amp; Refillable Rolling Ball Gel Pens, Fine Point, Black Ink, 12 Count (31029)</td>
<td>B00Y0AQT8W</td>
<td>1</td>
<td>10.49 USD</td>
<td>10.49 USD</td>
<td>EA</td>
<td>4412700</td>
</tr>
</tbody>
</table>

**TOTAL:** 10.49 USD

### Accounting Codes

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

**Action**

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

### Additional Information

**Summary Details**

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

**Shipping Address**

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

View Requisition Approvals

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

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

UNDP.PS@UND.edu
Ready to approve, reject or assign this document to yourself? **Take Action**

- **Billing**
- **Accounting Codes**
- **Internal Notes and Attachments**
- **Notes/Attachments To Supplier**
- **Line Items**
- **Other Approvers**

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

**Actions**

- **Approval Code**
- **Comment**

**Assign to myself**

**Approve**

**Jana K Thompson**

User Name: 0271774

- **Change Password**
- **Change Email Approval Code**
- **Change Security Question or Answer**

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

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

(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’.
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 Assign on the individual departments, or click multiple boxes, then click Substitution Actions and Assign Substitution to Selected Folders.
(3) Enter the appropriate Substitute name. If you want to add a date range, check the box for include Date Range for Substitution and enter that information then click 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
(3) If you need to notify an individual of the change, select the correct person. If the individual is not listed, click add email recipients. Enter the name and click search and Select.
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>

User with change request permission:
- Anna Leddige <anna.leddige@ndus.edu>
- request2 <anna.leddige@ndus.edu>
- request1 <anna.leddige@ndus.edu>
- request1 <anna.leddige@ndus.edu>

Changing funding

Attach file to this change request (optional):
- Attachment Type: File
- File Name
- File

TIP: Disregard this notification area

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

Create Change Request  Close
(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.

(6) Update the appropriate Funding and select **Save**
(7) Click Submit Request on the top of the page.

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

(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.
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.
3. Enter the reason for closing the PO and select OK.
(4) Note that the A/P Status has been updated to Closed.
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.
Quantity Receipt

Quantity receipts are used to receipt commodities

(2) Go to the Receipt tab to determine if there has been a previous receipt. Then click on Document Actions and Create Quantity Receipt.
(3) Enter the Packing Slip Number and enter appropriate quantity received.

(4) Review and click Complete. This will create a receipt number.
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
(1) Go to the Receipt tab to determine if there has been a previous receipt. Then click on Document Actions and Create Quantity Receipt

(3) This will create a receipt number
(2) Click Show Receipt Details

(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.

If you have received a Return Material Authorization (RMA) No form the supplier enter that information.

(5) Click Complete

(6) This will create a receipt number
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.
(3) Complete the Invoice Information section

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

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

(6) Enter the items that were purchased.
Click recalculate list total
(7) As long as your order is 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.

**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

Describe the anticipated future purchase with this supplier.

Will this purchase inhibit the ability for other vendors to compete on future purchases?

**Justification for this purchase**

- [ ] Purchase is for research and development (ECC 14-443.0)
- [ ] Purchase is for replacement or repair (ECC 14-443.0)
- [ ] Purchase is for a proposed award by a competitive solicitation (ECC 14-443.0)
- [ ] Purchase is for a proposed purchase by the same entity (ECC 14-443.0)
- [ ] User community available via the internet (ECC 14-443.0)
- [ ] Replacement part from manufacturer (or commercial substitute) (ECC 14-443.0)
- [ ] Compatibility and interchangeability of the currently owned equipment (ECC 14-443.0)
- [ ] Limited to same (refurbished or remanufactured) (ECC 14-443.0)
- [ ] Payment Card Industry (PCI) - Will the supplier be processing payments on the behalf of ODOT?
- [ ] Has the equipment certification been completed? Requested

**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 identifies technical specifications, a purchase order or approved request document that includes a particular piece of equipment was requested in a timely manner with grant; or application that demonstrates a bid process was completed to establish a standard.
- Documentation from a prior solicitation that establishes compatibility requirements.

By submitting this document, you state that you have read the internal document or document on the procurement and request data in policies. The notes and data that are complete and accurate to the best of your knowledge and belief. You state that you have no actual or potential conflict of interest in this purchase, and in compliance with the university's Code of Conduct. Violations of this code are cause for dismissal or other appropriate disciplinary action.

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### 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

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### Non-Standard IT Request

**Software Name**

Is this a removal?

- [ ] Yes
- [ ] No

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

If this is a removal, please complete the information below.

**Type**

**Data classification**

**CRN to receive data classification:**

**Audience for the software/system (who will be using IT):**

**Business Need Problem:***

**Proposed Solution:**

**Consistency TV with Organization's Mission:**

Has a WMA been requested from the vendor and attached with this request?

- [ ] Yes
- [ ] No

**If legal review:**

- [ ] Yes or the recommended legal review (any of the following are applicable to General Counsel review is required: 1. data, confidential information; 2. connect to social media; 3. non-standard OMA/ODOT CME agreement).
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.

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

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

(2) Review the comments
(3) Click Buyer Invoice tab to review the items on the invoice. Once you have reviewed, click Go by Add Comment.
(4) Select the individual to respond to and add the comment. Add an attachment if pertinent. Click Add Comment.
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.

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
### Example of an In Process invoice

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

---

### Example of a Paid invoice
Request New Supplier

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

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

(2) Enter the supplier Name
   Click Submit

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

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

(6) Click the certification box
Click Complete Request

(7) Click Yes
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

(2) Enter the Title and click Open Request Form

(3) Click Next
(4) Add attachments if necessary. Example: Specifications

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

TIP: Word documents are preferred for Specifications
(4) Click Next

(6) Answer the questions and click Next

TIP: Click on the Question marks to get additional information about the question.
(7) Answer the questions and click Next.
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.

Enter Information and Click Save Changes.
(10) Click Next

(11) If you are only procuring a product, click Next. If not, enter the correct information.
(12) Disregard this supplier page as you previously entered the potential suppliers under General Request Information. Click Next

(13) Click Next

(14) Click Yes
(15) Click Form Approval to see where the form will route
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
(4) To default a shipping address, click Default Addresses, Select Addresses for Profile.

(5) To default a cart assignee, select Cart Assignees, click Add Assignee.
Saved Searches

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

(2) Click **UND Shared searches**

(3) Click on appropriate report you are looking to run
(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
(6) Enter a specific department or choose a range and click Save

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

(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 Searches

- Shared
  AP Saved Searches
  UND Shared searches

Step 3: Select Export Template
Default Export Template: Screen Export

* Required

(10) Click Save

Save Close
The results of the search can be exported into a spreadsheet. Click Export Search.
12. Input a File Name Click Submit

13. Click Go to Page: Download Export Files

14. Click the zip file Click OK
(14) Click CSV File

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

   ![Select price or contract](image)

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.

   ![Contract number referenced](image)

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 following 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
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
1. Navigate to the B&H PunchOut site
2. Click the “Orders & Quotes”
3. Enter your phone number and your Purchase Order number
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”
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
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
1. Navigate to the GraybaR punchout site
2. Click the arrow next your zip code number and click the “Order history”
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
1. Lowe’s will send an email to you.
2. Click the “Check Order Status” button

![Lowes Order Status](image)

3. Enter your email and order number.

![Check Order Status](image)

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

**Back to Check Order Status**

### Order Details

<table>
<thead>
<tr>
<th>Order Date:</th>
<th>01/13/2021</th>
<th>Order #:</th>
<th>429505232</th>
<th>Total:</th>
</tr>
</thead>
</table>

### Truck Delivery

**Delivery (1 of 1)**

**Ready For Delivery**

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

<table>
<thead>
<tr>
<th>30-in 4 Elements 4.8-cu ft Freestanding Electric Range (White)</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
</table>

**Item #:** 1957070 | **Model #:** WFC150M0JW

### Payment Information

<table>
<thead>
<tr>
<th>Subtotal:</th>
<th>FREE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Truck Delivery:</td>
<td>FREE</td>
</tr>
<tr>
<td>Tax:</td>
<td>$0.00</td>
</tr>
<tr>
<td>Total:</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
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.
1. Login and navigate to the “Activity” button

2. See order details and tracking number on this page.
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”
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
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”