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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. Access can be

Website Address: www.und.edu/jaggaer

Navigation

Top of the Home Page – 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.
The **Home** icon brings you back to the main shopping page.

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

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

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

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

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

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

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

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

Within the **Shop** area are the items you have previously marked as **Favorites**.

The **Shop** area is where you will enter goods or services you are purchasing.

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

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 when an order is 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.
Searching for Carts, Orders and Documents

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

Non-Catalog Order 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.
Go to the left bar and select **Orders**.

Go to the **Search Documents** which allow you to search for Requisition, Purchase Orders and Invoices.

If you are frequently searching for the same items, you can utilize the **View Saved Searches**.

There are several filter options under Advanced Search to narrow your search.
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.

- **Shoppers:** All Faculty and Staff 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 string.

- **Approvers:** There are several types of approvers.
  - **Department Approvals:** Department approval is completed on behalf of the funding department.
  - **Special Approvals:** There have been several workflow steps created to automatically route purchases for approval based on set criteria based on compliance with UND policies.
    - **Capital Expense Approval**
      - Stops for accounts between 690000 and 699999
    - **Chemical Approval**
      - Stops for products that are hazardous, radioactive, toxins, as well as certain commodity codes that are identified as chemicals, explosives, drugs.
    - **Export Controls Approval**
      - **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 Approval**
      - Furniture, facility services, land, HVAC, Fire alarm systems, waste services
    - **Food and Travel Approval**
      - Individuals, Food and Travel commodities or account codes.
    - **Grants Approval**
      - Any grant project over $5000
    - **IT Director Approval**
      - **IT Hardware and software commodities for each IT directory.**
      - UND monitors’ computer end points and peripherals and software.
        - **Dependent on each IT director.**
    - **IT Approval**
      - CIO approval for software >$5K
    - **PI Approval**
      - All projects requiring PI approval.
    - **Procurement Approval**
      - Orders >$10K
      - Change requests
      - One-time addresses
    - **Secondary Department Approvals**
      - **Dependent on each department**
    - **Supplier Administration Approval**
      - 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.

(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
Select Assign Cart

Update Cart Name to easily find in the future

Select the appropriate Assignee

Enter a note to assist the requestor if necessary.

Click Assign

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

TIP: Requestors who shop can select Proceed to Checkout
Punch-out Catalogs

Punch-out Catalogs are maintained on the vendor’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 Vendor’s website. The punch-put 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 vendor site, enter the search criteria in the appropriate location on the suppliers.

(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.
(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
(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**.
Select Save Changes again

Select Next

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.

(15) Reoccurring Purchase: Select Yes if this is not a One-Time Purchase.

(16) Select Next

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

TIP: These boxes only show when creating a new supplier
(17) **Alternate Procurement**: If you choose ‘Purchase is over $10K and no bid/RFP completed’ in step 12, this form will provide the information needed to determine if the purchase is a Sole Source. Enter the appropriate information on the State APR form. When complete, click **Next**.

(18) **Contract Questions**: If you choose Yes for a ‘Recurring Purchase’ in step 15, this form will provide the information needed to setup the contract for future purchases. When complete, click **Next**.
(19) IT Non-Standard Form: If you choose Yes for an IT purchase in step 14, this form will provide the information for the UIT team to review the Non-Standard Purchase. When complete, click Next.
(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.
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

(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
(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.
**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

(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.

(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.

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

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

(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 Jana K Thompson,

The requisition listed below has been submitted for your approval.

**Summary**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folder:</td>
<td>Department Approval - 3120</td>
</tr>
<tr>
<td>Prepared by:</td>
<td>Anna Ledige</td>
</tr>
<tr>
<td>Prepared for:</td>
<td></td>
</tr>
<tr>
<td>Cart Name:</td>
<td>2020-01-31 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 Items:</td>
<td>1</td>
</tr>
<tr>
<td><strong>TOTAL:</strong></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></td>
<td>PILOT 02 Premium Retractable &amp; Retractable Ball Gel Pens, Fine Point, Black Ink</td>
<td>B001G10STW</td>
<td>1</td>
<td>10.49 USD</td>
<td>10.49 USD</td>
<td>E4</td>
<td>44121700</td>
</tr>
</tbody>
</table>

| **TOTAL:** | 10.49 USD |

**Accounting Codes**

<table>
<thead>
<tr>
<th>Account:</th>
<th>536015 : Office Supplies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department:</td>
<td>3130 : Procurement &amp; Payment Services</td>
</tr>
<tr>
<td>Fund / Dept.:</td>
<td>22116-3130 : Accounts Payable</td>
</tr>
<tr>
<td>Project:</td>
<td>-</td>
</tr>
<tr>
<td>Program Code:</td>
<td>-</td>
</tr>
</tbody>
</table>

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

**Take**

**Action**

**Additional Information**

<table>
<thead>
<tr>
<th>Summary Details</th>
<th>Hold Check</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Purpose</td>
<td>Pen replacement</td>
<td></td>
</tr>
<tr>
<td>Work Order Number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alternate Procurement No</td>
<td>Request</td>
<td></td>
</tr>
<tr>
<td>IT Non-Standard</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Comments:</td>
<td>(1)</td>
<td></td>
</tr>
</tbody>
</table>

**Shipping Address**

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

**(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
UND.PPS@UND.edu
Ready to approve, reject or assign this document to yourself? 

**Action**

- 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 *
  - Required

- Comment

- **Assign to myself**

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

(3) This will create a receipt number
(1) Go to the Receipt tab to determine if there has been a previous receipt. Then click on Document Actions and Create Quantity Receipt.
(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**. For 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 supplier's 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.

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-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.
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

Attach file to this document (optional):

Attachment Type
File

File Name

Add Comment Close
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.
(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

(9) 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**.
If you want to save the updated search, click the dropdown by Save Changes and select Save New Search.

Select a personal Folder.

Name it as you wish and click Save Changes.
Add to Saved Searches

Step 1: Edit Saved Document Search Details
Nickname
Department Open Orders

Step 2: Select Destination Folder
- Personal
  - Anna’s Searches
- Shared
  - AP Saved Searches
  - UND Shared searches

Step 3: Select Export Template
Default Export Template
Screen Export

* Required
Save → Close

(10) Click Save
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