Jaggaer Catalog and Non-Catalog Requisition Entry Instructions -

Hello, and welcome to University Procurement's training video on how to enter in Catalog and Non-Catalog Requisitions.

Note: A catalog vendor, also known as a punch out catalog, will always be listed on the "Showcase" Section of the Jaggaer home page. Please note that catalogs you can shop from ultimately depend on your role within the system and on campus. Your view of available catalogs may be different than shown.

Before we get started, please note that some sections within the requisition process are required in order for a requisition to be completed. You will need 1) a business purpose for each transaction, and 2) FOPAL information. Depending on the type of requisition you are entering, you may also need quotation documentation from the supplier you wish to purchase from.

Please also note that you will no longer be required to enter in a commodity code for your transaction. Based upon how you are shopping, this code will either be entered automatically or will be assigned to your requisition later in the process.

Let's get started:

1. The shopping experience within Jaggaer can vary greatly depending on how you're wanting to find or purchase a product. You can search for products using the "Search" bar function, or you can utilize contracted vendors catalogs via a Punch-Out Catalog or Hosted Catalog. For this walkthrough, let's focus on the catalog section for purchases.
2. Select a Punch-Out Catalog or a Hosted Catalog you are interested in shopping from. Punch-out catalogs "punch" the user out to the vendor's website to browse products or services. Hosted catalogs are Excel based catalogs that live inside the Jaggaer environment.
3. For the purpose of this example, we'll be using a punch-out catalog which will punch me out to a vendor's website. Each catalog and corresponding website will be different, but for the ease of understanding this process let's select Amazon.
4. From here, I would browse products normally, find an item I am interested in buying, and add it to my cart. When I am ready to check out, I can select the "Cart" function or "Submit these items for approval" function. Again, each catalog experience will be different but the functions remain relatively the same.
5. If I select "Submit these items for approval", Amazon collects my items and "punches" back to my Jaggaer experience to complete my purchase. From this screen, I can either select "Proceed to Checkout" or select the "Home" button on the top left to browse for more products. Key note here; through Jaggaer you can order multiple items from multiple suppliers through the same requisition. Each order will, once approved and flipped to a purchase order, be distributed to the correct supplier automatically. There is no need to create multiple requisitions for a different vendor unless that is specifically how you would like to track documentation.
6. For the purpose of this example, we'll just focus on a two line item requisition to a single supplier.
7. From your shopping cart screen, you have a few options.

a. You can customize your cart name. Or you can give it a description which describes your purchase.
b. Note that both of these fields are internal to the system and will not be sent to the supplier. Likewise, they will play no role in the ultimate approval of your requisition.
c. Also note that catalogs do not allow you to modify descriptions, pricing, etc. If you have any questions or issues concerning an item, please contact a member of University Procurement at 2-2047

8. Also, one important thing to note about the Jaggaer checkout experience is the notification areas denoting required fields. Required fields are noted by large, yellow highlighted areas. Required fields must be completed prior to being able to submit your requisition. On this page, you will notice that you need to provide a “Business Purpose”. Click the “Add Note” text on each line and enter in a business purpose to justify your purchase.
9. Once this is entered, press “Proceed to Checkout”.
10. Starting from the top, notice that you have more required fields that must be completed. For any requisition, you must provide the following:
    a. Shipping Address
    b. Business Purpose
    c. FOPAL information (Chart, Fund, Organization, Program).
11. The system will default you to the first required field that needs to be completed; the Shipping section.
12. Within the shipping section, select “Edit” and then find your building location by using the “Select from Org Address” function next to Shipping Address. A pop up window will open and will ask you for the Nickname/Address Text. You can enter in the beginning name of your building and then press “Search” to bring up that building in our database. Once you you’re your address, press the “Select” button and Jaggaer will bring your address into your requisition. From there, type in your Room location; the room number or other identifying information into this text box so that your order can be delivered.
    a. Please note that we only allow shipments to take place to on campus addresses or regional campuses. If your address does not appear, please contact University Procurement at 2-2047 for assistance.
13. If this is your default location on campus, press the “Save this address for future use” checkbox and your address will auto-populate for every requisition you request from this point forward. Please note that if you ship to multiple locations, it might not be a wise idea to save your default address. Also, note that if you are buying a project for Facilities, for example, you would enter in your current building location and not the project location since those addresses will not necessarily be loaded in Jaggaer and you are ordering a service, not a finished good.
14. Once your Address and Room details are complete, press Save.
15. On the left hand side of your requisition navigation screen, select Account Codes.
16. On the Account Code section of requisition, you will input in the FOPAL details for your line denoting what Chart and Org your purchase is being made from. To get started, press the “Edit” button and a small window will appear.
17. Starting from the left, under Chart, use your mouse to press “Select from All Values” and select what chart you will be using. Chart E denotes University funds. Chart F denotes Foundation funds.

18. Once you select a chart, and we'll use Chart E for our example, the Organization section becomes active. Again, navigate to Organization and select "Select from All Values". A window will appear.
19. You will have the option of either selecting your org code from your specific org number, such as 600500. If you do not know your org code, you can search for it using the Description field below Value. Pressing Search will cause the system to query available org codes and, if entered correctly, your org code should appear. If this is correct, press Select to bring that org code into your FOPAL line.
    a. Note: If you cannot locate your org code, please contact University Procurement at 2-2047 for assistance.
20. From there, the Account code and Program code will autocomplete. These values should not be modified. Also note that Activity and Location are not needed unless you specifically need to include this information for your transaction.
21. If you need to split a purchase between different FOPAL lines, select the "add split" function and enter in your secondary FOPAL information into the new accounting line provided. You will need to denote the percentage of the total price each FOPAL string makes up by inputting a "% of Price" for each line. You can also split based upon % of Quantity, Amount of Quantity, and Amount of Price. Once you have input your split values, press the "recalculate/validate" option and Jaggaer will validate your split accordingly. Note that the total split must equal out to be 100% of your total line's value.
22. If you have multiple lines but the same FOPAL information, you can use the "Copy to Other Lines" function to copy the same accounting string to multiple lines. To do this, you must first enter in FOPAL information to Line 1. Then, press the "Copy to Other Lines" function and a window pops up. To copy to your other lines, simply check the check box beside each line you want to copy your FOPAL information to and select "Copy".
23. Once your Account Code section is complete, your requisition should be ready to be submitted. If you have any documentation that you need to return to the supplier along with your purchase order, use the External Notes and Attachment section. Attachments, like quotation approvals, etc. can be uploaded to your requisition using the "Add Attachments" function at the top of this screen. Likewise, if you need to provide a note to the supplier you can select the "Edit" button next to the Note to Supplier section of your line to leave the supplier a note. Please note that each of these items will either be printed on the purchase order if you include a note, or included as a PDF along with a copy of the PO when emailed to the supplier.
24. Check to make sure you do not have any missing required fields in the top portion of your requisition, and that all sections on your left navigation menu are checked off and green.
25. If, in the case pictured, you did not fill in a business purpose on your Shopping Cart screen, and the system is alerting you to this missing field, you can enter in your business purpose by selecting Final Review, scrolling down to the bottom where your requisitions lines are, and completing the yellow highlighted required business purpose fields.
26. Other sections you may want to look at would be the following sections. These are found on your left navigation menu after "Final Review".
    a. PR Approvals – This will visually show you the workflow steps your requisition must take before it can be approved. Please note that not every step within this workflow involves

a physical stop within an EKU Department for review. Some of these stops are automatic checks built into the system.
   b. Comments – If you want to note a comment about your requisition, you can place that here. Note, this is not a place to store time sensitive information or important instructions.
   c. Attachment Overview – With this tab, you can review any attachments submitted as part of your requisition.
   d. PO Preview – This option just shows you an overview of how your PO will look once complete, based upon lines submitted.
27. Once you're ready to submit your requisition simply hit Place Order. Your window will refresh and you'll be presented with a confirmation screen letting you know that your requisition has been submitted. From here, you can check on an order's approval status, search for another item, view your overall order history, check the status of another order, or return to your home page.
28. Also, it's important to note that you should pay attention to both your notifications while within the Jaggaer system, and your EKU email. If an issue arises with your requisition that would require it to be returned or a question to be asked, a notification will be sent to your Jaggaer profile and your EKU email address.
29. If you navigate away from this page, you can easily find the status of any of your submitted requisitions by going to the Orders tab, selecting My Orders, and then you can search by Requisitions, Purchase Orders, Invoices, Receipts, etc.

To enter in a Non-Catalog Item, you'll follow many of the same steps as before.

1. Navigate to the Forms section and select "Non-Catalog Request". Please note that, over time, this form may change or be modified to request additional information.
2. Within the window that pops up, enter in your Supplier (if known) or you can click on Supplier Search to search for a supplier within the Jaggaer database.
3. Once you have located your supplier, complete the remaining items on the form. Required fields are noted with bold text.
   a. Quote Number – Not required, but if you have a quote number you can enter it in this field.
   b. Product Description – Enter in a line item description for your purchase. Typically, this is just a re-entry of what you're trying to purchase based upon your quotation. Please note that there is a 254 character limit to this description.
   c. Quantity – Note the quantity of the item you are ordering.
   d. Estimated Price – Enter in the price for each quantity, NOT your total price (unless you are purchasing a quantity of one).
   e. Packaging/UOM – Denote the unit of measure you are purchasing. Most purchases will default to EA-Each for the purchase of items. Or, you can use the drop down associated with UOM to select a different type of UOM for your item or services. If you are confused about what to input within this field please contact University Procurement at 2-2047.

  f. Internal Attachments – Please upload a copy of any quotation(s) received for this requisition.

4. Once all fields are complete, navigate to the top right and select “Add and Go to Cart” and press GO to be brought to your cart for check out.
5. Note that non-catalog items can only be entered in one a time. If you need to add another non-catalog item for this vendor to your requisition, use the “Add non-catalog item for this supplier” function on your Shopping Cart screen as so.
6. Once you are finished entering in lines, select Proceed to Checkout and complete the same fields as before during your checkout process like Shipping, Account Codes, Business Purpose, and place your order.