# Jaggaer Quick Guide

Need an answer fast? Use the table of contents below to find what you are looking for. If you cannot find the answer you need, contact the Purchasing Department and we will help you out.

Quick overview

Getting started

Setting account defaults

Shopping with a PunchOut supplier

Shopping with a non-catalog supplier

Shopping with an unknown supplier

Assigning a cart

Approving a requisition

Setting approval code

Creating a quantity receipt

When a requisition is rejected

Viewing order status and history

Shopping with Lands' End

Ordering business cards (or custom stationary)

Airline tickets, hotel reservations, and similar

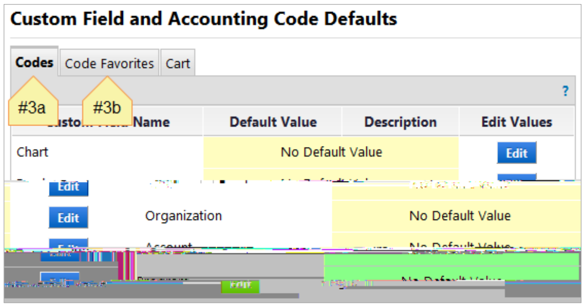
Costco and Office Depot Cards

Summary of purchasing process

# Quick overview

To access your Jaggaer portal, log into myCampus, and click on the Jaggaer icon.

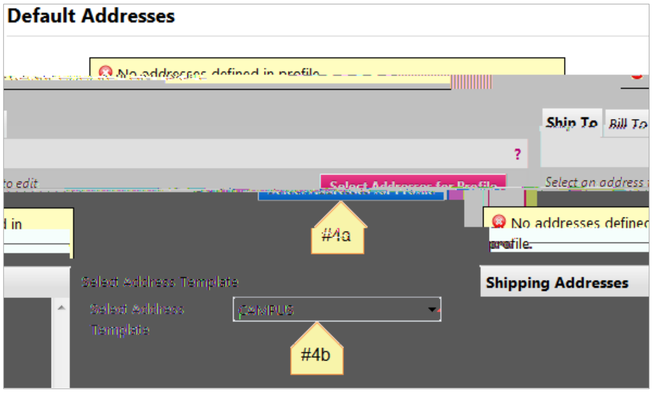
# Getting started



Custom Field and Accounting Code Defaults

Codes
Code Favorites
Cart
?
#3a
#3b
Edit
Edit

| Custom Field Name | Default Value | Description | Edit Values |
|---|---|---|---|
| Chart | No Default Value | | Edit |
| Organization | No Default Value | | |



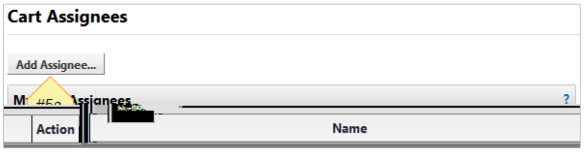
Default Addresses

No addresses defined in profile.

Ship To
Bill To
?
Select Addresses for Profile
Select an address
#4a
Shipping Addresses
#4b

Select Address Template

Select Address Template: CAMPUS



Cart Assignees

Add Assignee...
#5a
?

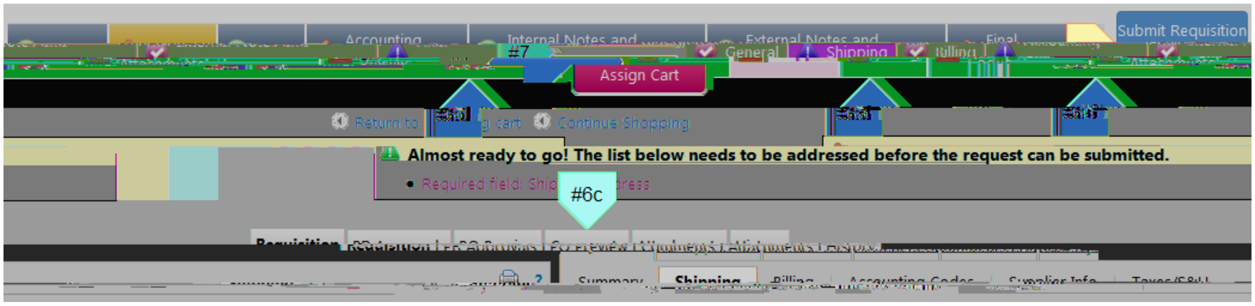
My Assignees

| Action | Name |
|---|---|

Back to top

# Shopping through a PunchOut

1. On the Jaggaer homepage, click on your desired vendor's PunchOut icon. You will be redirected to the vendor's website.
2. Shop and create a cart as you normally would.
3. Click on "Check Out." This will redirect you back to Jaggaer.
4. Set appropriate commodity codes to all line items.
5. Click "Proceed to Checkout" button at top right of your screen.


Submit Requisition
Accounting
Internal Notes and
External Notes and
Final
#7
General
Shipping
Billing
Assign Cart
Return to
cart
Continue Shopping
#6c
Summary
Shipping
Billing
Accounting Codes
Supplier Info
Taxes/S&H

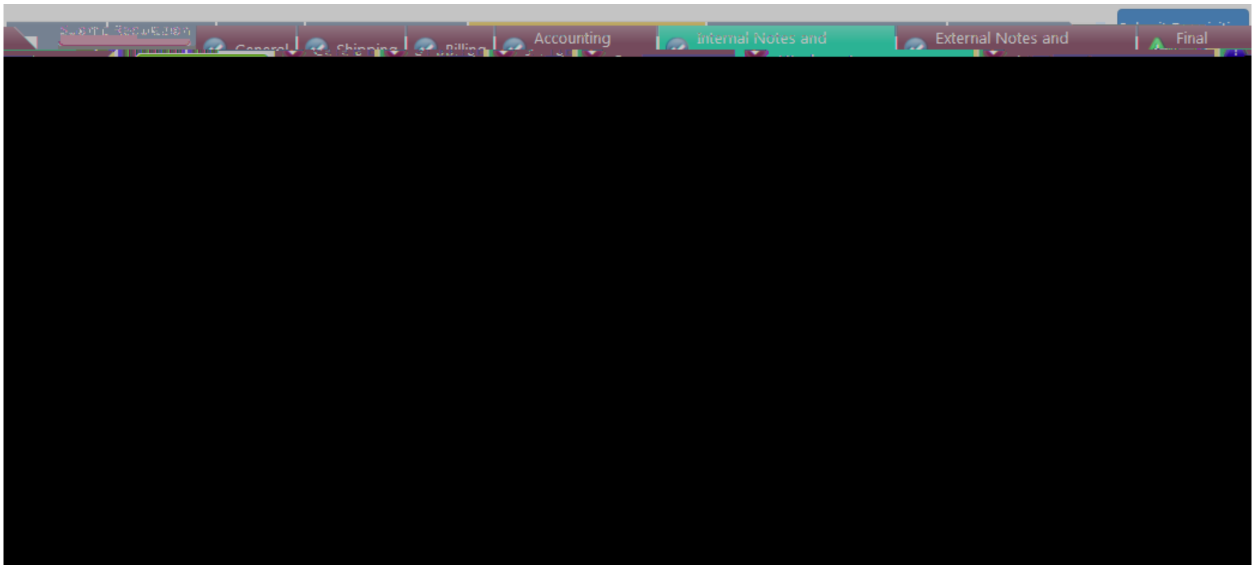
Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Ship address

6. Click on items in progress bar that need your attention
    a. Set shipping address. Make it easier by setting a default address.
    b. Set accounting codes. Make it easier by setting a default code.
    c. Add comments applicable to your order that you want approvers to see.
    d. Do a final review over everything, making sure quantities and prices look correct.
7. Assign cart if you need to, or submit it for approval.
8. View status of requisition.

# Shopping with a non-catalog supplier

1. On the Jaggaer homepage, click on “non-catalog item,” which is found under the center search bar. This will pull up a pop-window.
2. Select your desired supplier. See shopping with an unknown supplier if you cannot find your vendor.
3. Set Product Description to the item title, along with any pertinent details, such as color and size.
4. Set Catalog No., as found on supplier’s website or quote.
5. Set Quantity and Price Estimate.
6. Keep Packaging at “EA6ngTd ( )T58.9( 6(K)2.6( 1  scn 2E)-8.9(A6ngTd (3gTd ( ))-6(aE)-8.9(A6ngTd ( )T58.


General
Shipping
Billing
Accounting
Internal Notes and
External Notes and
Final

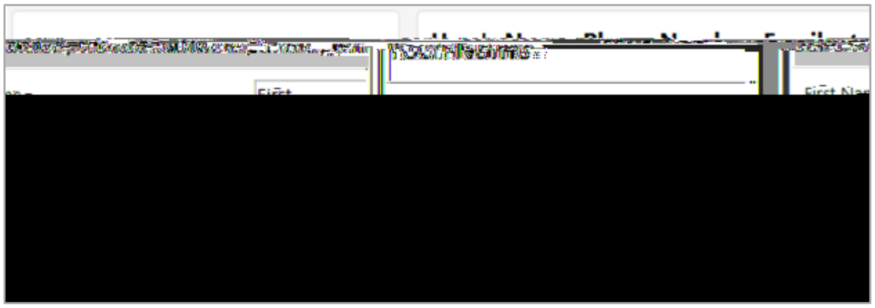
a. To add a note or attachment you want only your approvers and the Purchasing Department to see, click on the Internal Notes and Attachments tab on the progress bar, and edit as necessary.

b. To add a note or attachment you want the supplier to see/receive, click on the External Notes and Attachments tab on the progress bar, and edit as necessary.

# Setting approval code

By setting up an approval code, you will be able to take action through email in any future requisitions. You will still need to log in to your Jaggaer portal for any pending requisitions you had prior to making an approval code.

1. Click on your name at the top of the Jaggaer homepage and navigate to View My Profile .
2. Click on Update Security Settings in the menu on the left of your screen.



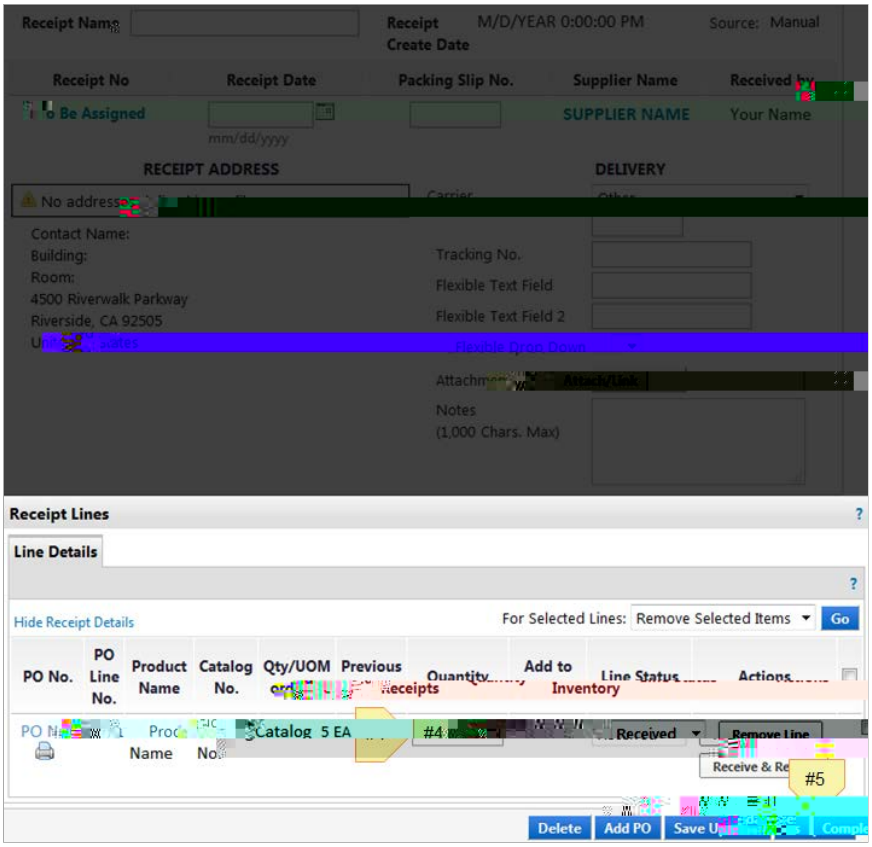
[redacted]

3. Select Change Email Approval Code. This will pull up a pop-up menu.
4. Create a code of your choosing. Be sure to write it down somewhere so you can remember it; the Purchasing Department does not have a way to look up your code if you forget it.
    a. You can always reset your approval code by logging into your Jaggaer portal and following the steps above if you forget your code.

# Creating a Quantity Receipt

You will usually get notified when orders need a [quantity receipt](), but you should also just make it a habit to do this whenever you receive a package.

1. Navigate to the Purchase Order that needs a receipt.
2. In the top right corner, there is an Available Actions dropdown menu. Set it to “Create Quantity Receipt” and click the “Go” button.
3. Jaggaer will pre-populate the data on the top half of the page. You do not need to update any of the information there.
4. In the Line Details section, update



Receipt Create Date M/D/YEAR 0:00:00 PM
Source: Manual
Receipt Date mm/dd/yyyy
Supplier Name SUPPLIER NAME
Received by Your Name
Contact Name:
Building:
Room:
4500 Riverwalk Parkway
Riverside, CA 92505
For Selected Lines: Remove Selected Items

Receipt Name
Receipt No
Packing Slip No.
RECEIPT ADDRESS
DELIVERY
Tracking No.
Flexible Text Field
Flexible Text Field 2
Notes
(1,000 Chars. Max)
Receipt Lines
Line Details
Hide Receipt Details
Go
PO No.
PO Line No.
Product Name
Catalog No.
Qty/UOM
Previous Receipts
Quantity
Add to Inventory
Line Status
Actions
5 EA
#4
Received
Remove Line
#5
Delete
Add PO

# When a requisition is returned

You will receive an email notification whenever something goes wrong with your requisition. In the email, be sure to view any notes that were attached at the time of return. This message will explain why your requisition was returned or rejected. Common causes are an insufficient budget to carry out the transaction or no authority to post to a certain budget. Sometimes, an approver or the Purchasing Department may reject a requisition, and reasons will also be listed in the email. Take appropriate actions (request a budget transfer, call rejecter, etc.) and once the issue has been resolved, you can resubmit the requisition.

# Viewing order status and history

To view the current status of your order, there are several options. If it was ordered through one of the PunchOut suppliers, enter the PunchOut to view your recent orders. There you will be provided with tracking information. If it was a non-catalog supplier, you can first view the history tab of your requisition to make sure it was approved and converted to a purchase order. From there, you can contact the Purchasing Department

# Shopping with Lands' End

We have a special system set up with Lands' End to ensure orders are placed correctly. The process is not quite as simple as using a PunchOut, but if you follow the steps below, you should not have any problems placing an order.

1. Start at the La Sierra Business Outfitters website.
2. Shop online to create your cart. Be sure to add your desired logo to the items you are ordering.
3. Once you are ready, view your cart and click the "Start Checkout" button on the right of the screen. You can also add any promotional codes on this page.
4. You will need to log in to your Lands' End account. If you don't already have one, you can easily create an account on this page.
5. Be sure to set your shipping address and select your shipping method. In the Billing section, select "Account Payment," and then you can review and place your order. Take note of the order total while on this page.
   a. By doing this, an email will be sent to the Purchasing Department to review and approve the purchase.
6. Move back to Jaggaer, and begin a non-catalog cart.
   a. In Product Description box, include a description of what you ordered. An example might be "Polo shirts for student workers in Accounting Office."
   b. Set the estimated price as whatever the order total was when you were checking out on the Lands' End site.
7. Continue through checkout as you normally would with non-catalog suppliers.
8. Once the requisition is received by Purchasing, they will approve the order via email and your order will be placed.

Back to top

# Ordering business cards

1. Enter the Office Depot PunchOut.

# Airline tickets, hotel reservations, and similar purchases

If you wish to purchase airline tickets, make a hotel reservation, register for a conference, or make a similar purchase, do it through the Purchasing Department!

1. Fill out a travel authorization form and obtain proper approvals.
2. Gather all applicable data (vendors, pricing, etc.) and create a requisition in Jaggaer. If your preferred vendor is not in our system, follow these steps to submit your requisition.
3. Once you have submitted your requisition, contact the Purchasing Department to make an appointment.
    a. Bring a copy of your travel authorization form to your appointment for their records.
    b. During your appointment, you will come to the Purchasing Department and do your online shopping at a computer there. When it is time to check out, someone there will enter the University credit card and billing information.

Back to top

# Costco and Office Depot Cards

The Purchasing Department has one Costco card and two Office Depot cards available for employees to loan out. The Costco card is available to use whenever you would like to buy items there. The Office Depot cards are available to use for print and copy at our local store.

1. Contact the Purchasing Department to request a paper requisition. This is the only time that it is appropriate to use a paper requisition, opposed to utilizing Jaggaer.
    a. Be sure to properly indicate the vendor you want to use and the accounting code(s) you want to charge.

# Summary of purchasing process

1. A department has a need.
2. A cart is filled out and submitted in Jaggaer.
3. The budget is automatically checked by Banner.
4. A requisition is created.
5. The requisition goes through an approval process.
6. The requisition goes under purchasing review.
7. The requisition is approved by the Purchasing