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Jaggaer Training Manual – Updated for CEM Process

Updated 1/20/21

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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 single-sign on which uses the user name and password the individual uses to login on their computer.

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

Use drop down arrow to narrow search

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

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

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.
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.
(1) Go to the left bar and select **Orders**.

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

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

(4) There are several filter options under Advanced Search to narrow your search.
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
(8) Update Cart Name to easily find in the future

(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 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-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 vendor site. Enter the search criteria in the appropriate location on the suppliers.

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

(15) Select Next.

TIP: Click the Question Mark by a heading to get additional information about the question.
(16) **Alternate Procurement**: If you choose ‘Alternate Procurement Request’ 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**.
(17) **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.

(18) **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.

(19) **When complete click Next.**
(20) 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.

(21) The form will then be added to your cart.
Creating a Requisition:

1. Click **Proceed to Checkout**

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

3. General Section: Click on ‘Required field’ by Business Process
(4) General Section:
**Business Purpose** – Enter a descriptive business purpose that can stand alone if an auditor was to review. Click Save

(5) 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**.
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.

### 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

**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.

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<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
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| Duplicating Services | Attn: Anna Leddige  
141 Facilities  
3701 Campus Road  
Grand Forks, ND 58202-8008  
United States      |

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

(8) 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.

(9) Billing Section: The billing section will be handled by the payment method within PeopleSoft. DO NOT make any updates to this area.
(10) **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.

(11) **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.
(12) **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**

(13) **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.
(14) 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.

(15) 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.

(16) Split: If there are 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 needs specific funding you can adjust it at the line level by choosing edit on that line.

(17) 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.
(18) 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.

(19) 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.
(20) If using an Alumni Fund for the purchase, click 'edit'. Enter the Alumni Fund under the line item notes. This will get brought into PeopleSoft to pull for Alumni charging. Not know funding. Click 'Assign Cart'.
(21) Assign the cart to the Shared Service Center to complete the requisition. Click ‘Assign Cart’.

(22) 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: Save the Stephanie as the default assignee by checking Add to Profile.

(23) Click ‘Assign’
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 from the supplier, enter that information.

(5) Click Complete

(6) This will create a receipt number
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
   - John’s IT Company

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
Click Next

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.
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
Notification Preferences

Notifications were all defaulted on, however if you are not seeing them make sure your notifications are on.

(1) From the Home Page, click the silhouette in the upper right-hand corner
Click View My Profile

(2) Click Notification Preferences and review the notifications.
(3) To update, **Click Edit Section** and update the appropriate notifications.

(4) **Click Save Changes**
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
This search can be filtered by all the criteria on the left.

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
Add New

- 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
(14) Click the OK
(14) Click CSV File
(15) Your output can be manipulated to meet your needs