JAGGAER USER MANUAL

JAGGAER

Welcome to JAGGAER!

The University of Idaho is excited to bring JAGGAER to our campuses and locations across the state. JAGGAER is a state-of-the-art procurement system providing an end-to-end online experience for the procurement process: from sourcing to buying and payment. The system replaces Banner purchase orders and VandalWeb contracts modules. JAGGAER will improve procurement processing time and increase access and visibility to end-users and vendors. A initiative of the Idaho State Board of Education, JAGGAER will be used by U of I, Boise State University, Idaho State University, and Lewis-Clark State College. The goal is to increase efficiencies and maximize savings for all Idaho higher education institutions.

This manual has been developed by the Contracts and Purchasing team to be your go-to reference guide for questions and instructions. Please let us know if you find something in this document that can be improved or is not addressed.

If you have any questions regarding JAGGAER, don't hesitate to contact us at jaggaer@uidaho.edu, and we will address your concerns.

Go Vandals!

Julia McIlroy
Director, Contracts and Purchasing Services

Please consider the environment and the use of resources before printing this manual. The PDF version of this document is interactive and utilizes hyperlinks for your convenience.

Contents

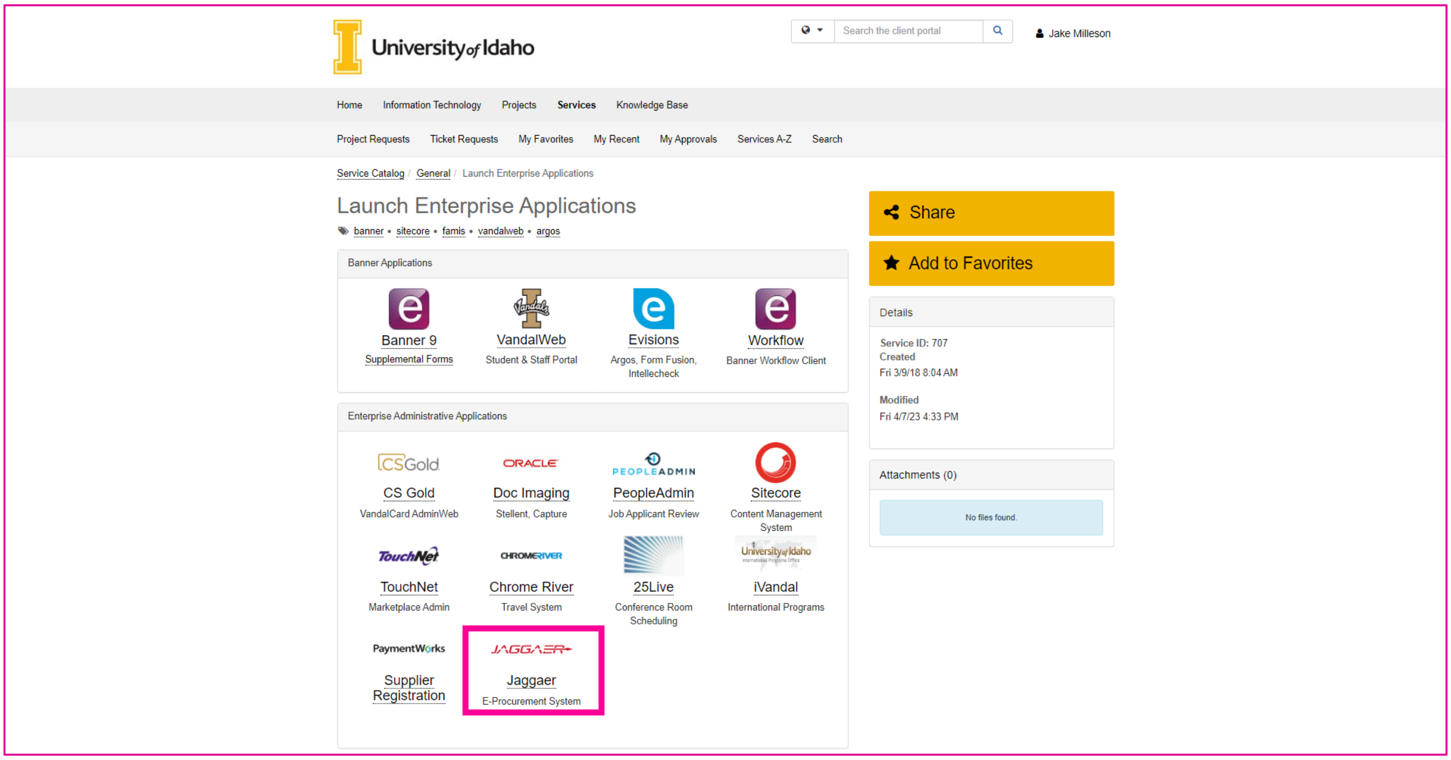
Draft Edition 3
Revised: November 15, 2023

Section 1: Getting Started

University of Idaho

Logging in

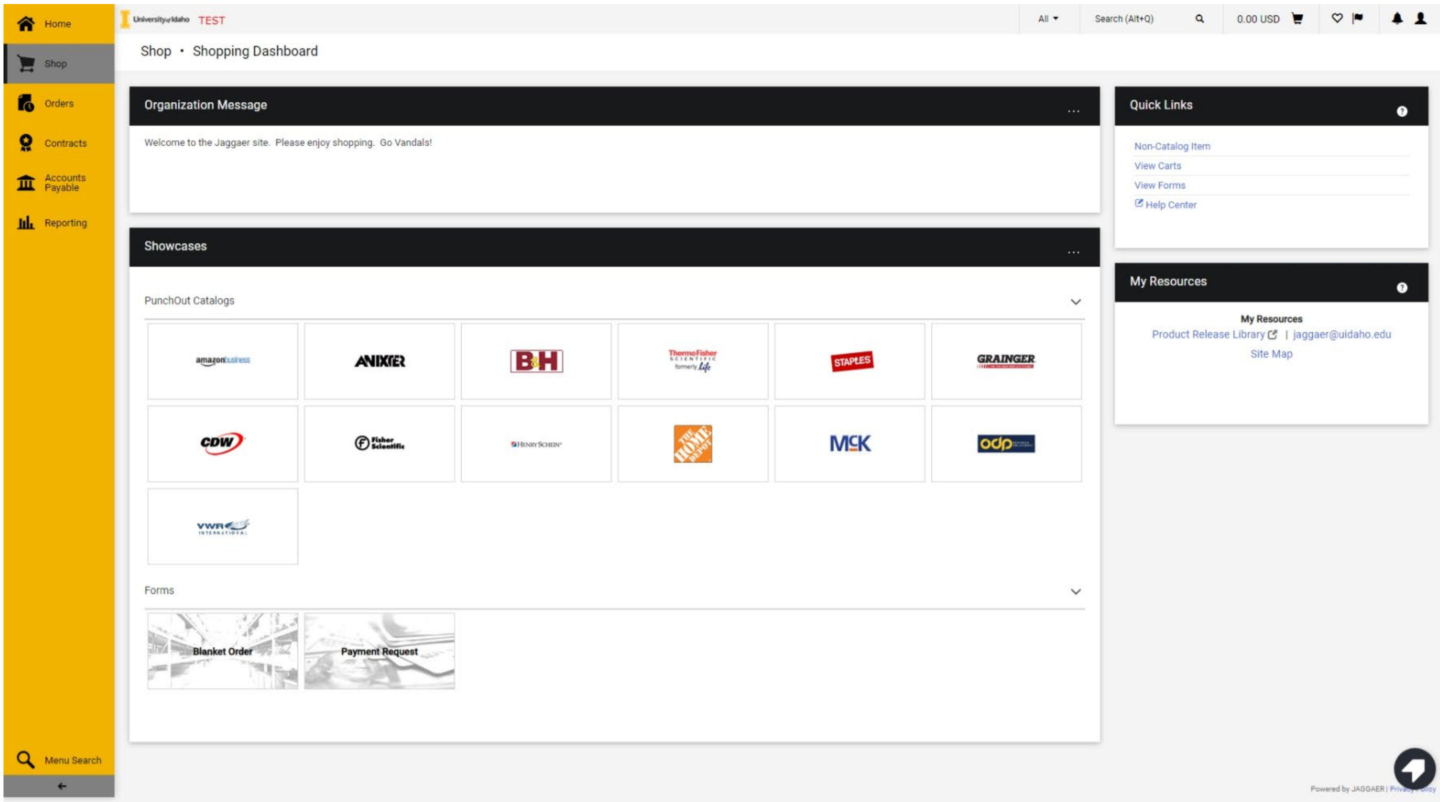
To log into the JAGGAER system, launch the application from the "Launch Enterprise Applications" page on support.uidaho.edu.

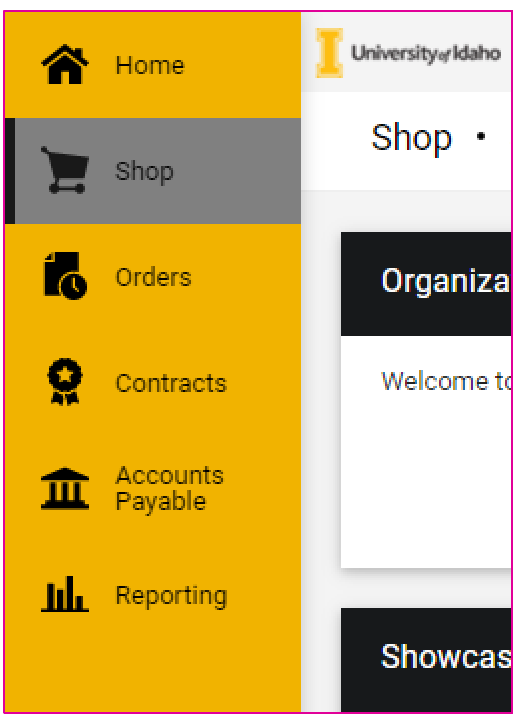


The JAGGAER system uses Single Sign On (SSO); you will use your University of Idaho active directory credentials if prompted.

Basic JAGGAER Navigation

The default homepage for all users is the **Shopping Dashboard**.





Global Menu

On the left you will see the left-hand **global menu**. This houses the different modules JAGGAER has. Depending on your assigned roles, you may see additional modules. Standard modules include:

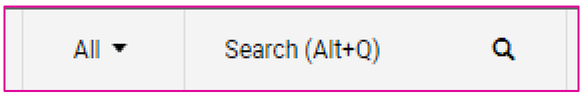
1. **Shop** – Allows you to manage your shopping carts and create orders.
2. **Orders** – Allows you to search and view your requisitions and purchase orders.
3. **Contracts+** – Allows you to search contracts you have access to and request new contracts to be created.
4. **Accounts Payable (AP)** – Allows you to view your assigned AP approvals, pay invoices, and see your AP requests.
5. **Reporting –** Allows you to generate reports from JAGGAER.

Action Bar

Across the top of your screen, you have the **action bar**. This gives you quick access to various functions and will always be at the top of your screen.

Search Bar

The **search bar** allows you to quickly search for documents using the document number/name in JAGGAER. For the best results use the drop down to select which type of document you are looking for.

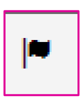


Shopping Cart

The **shopping cart** will give you a quick total of your current transaction. You can save shopping carts for later use. See the ***Searching for Carts, Orders and Documents*** section for more information and best practices.

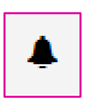
Action Items

Action items are flagged and will give you quick access to items you need to approve.



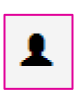
Notifications

The **notifications** bell will give you important status updates.



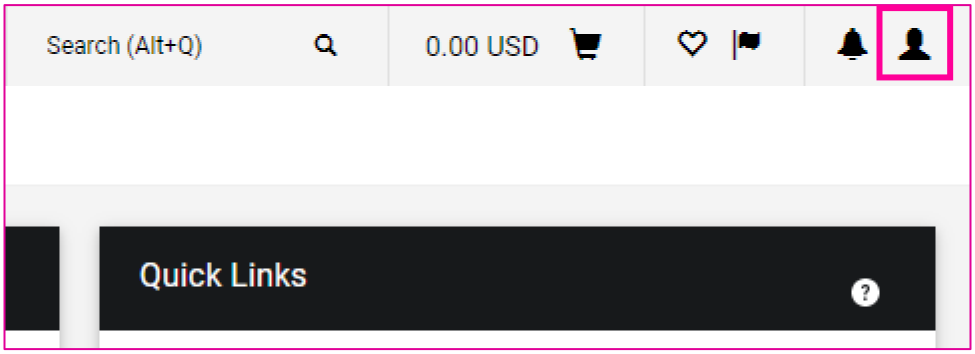
Profile

Your **profile** gives you access to various quick settings and recently completed documents.

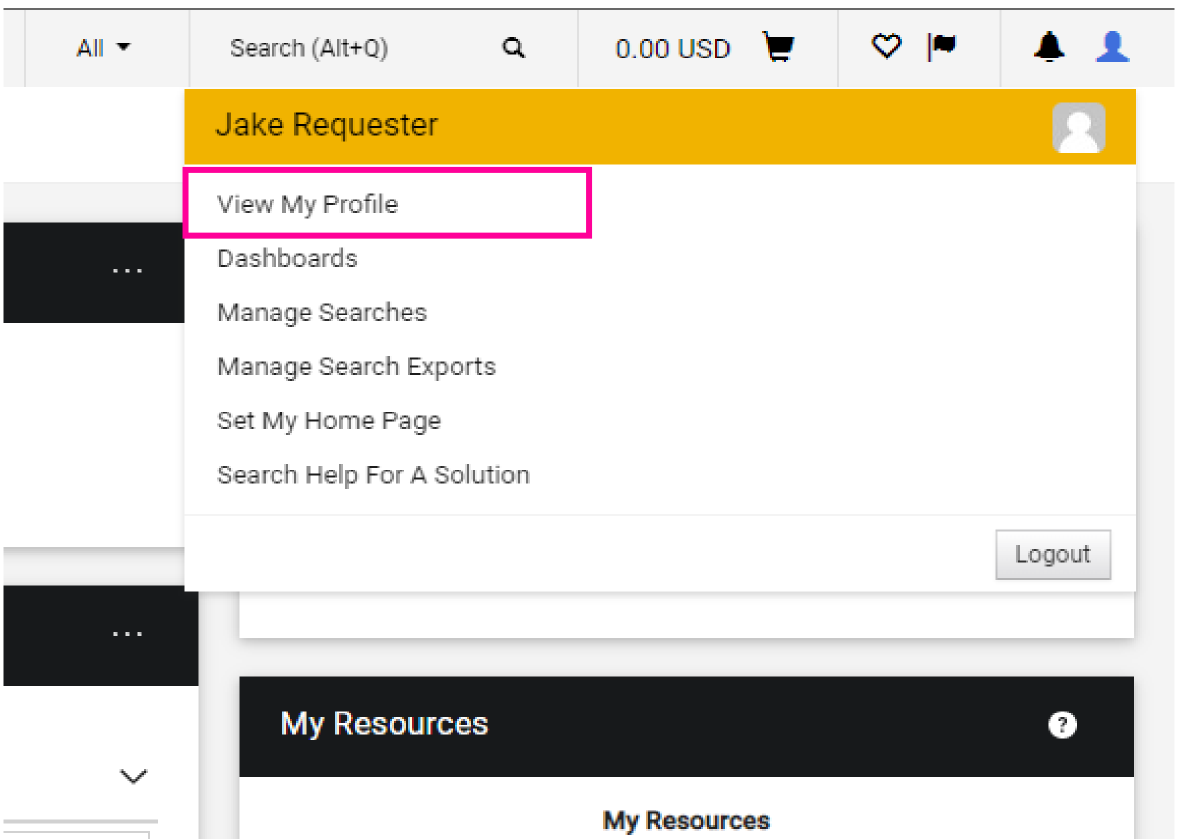


JAGGAER User Profile and Default Settings

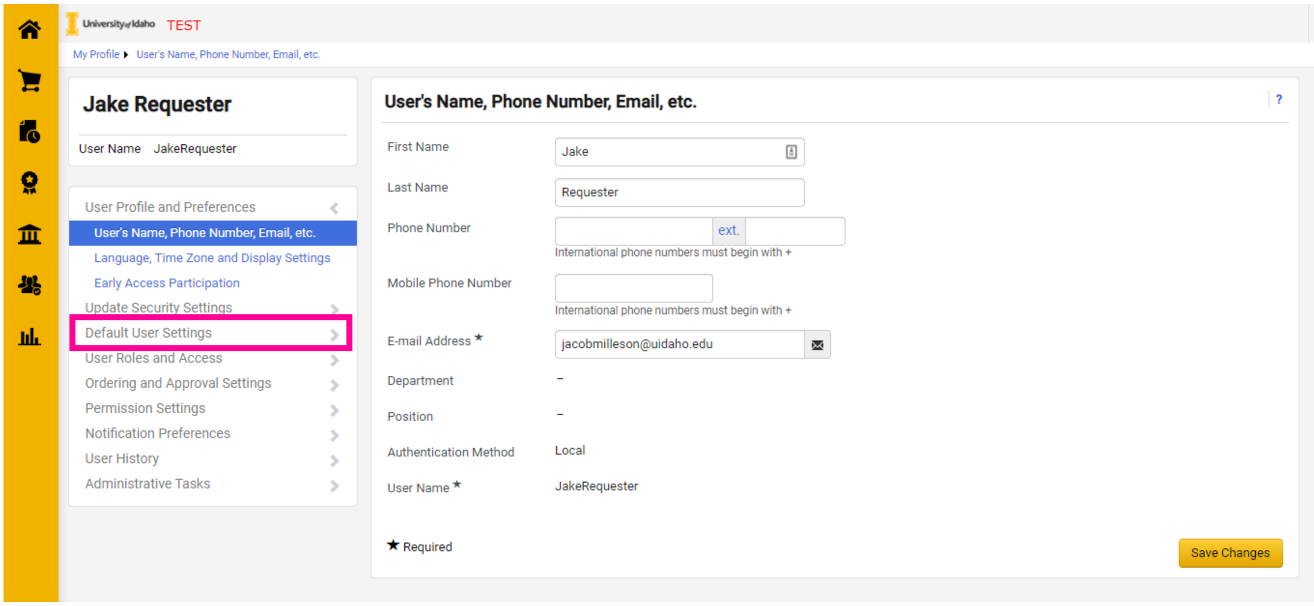
To access your JAGGAER user profile, click the **profile icon** in the upper right of the screen.



After clicking on the profile icon, you will see the option to “**View My Profile.”** Select this option to set your profile’s default options.



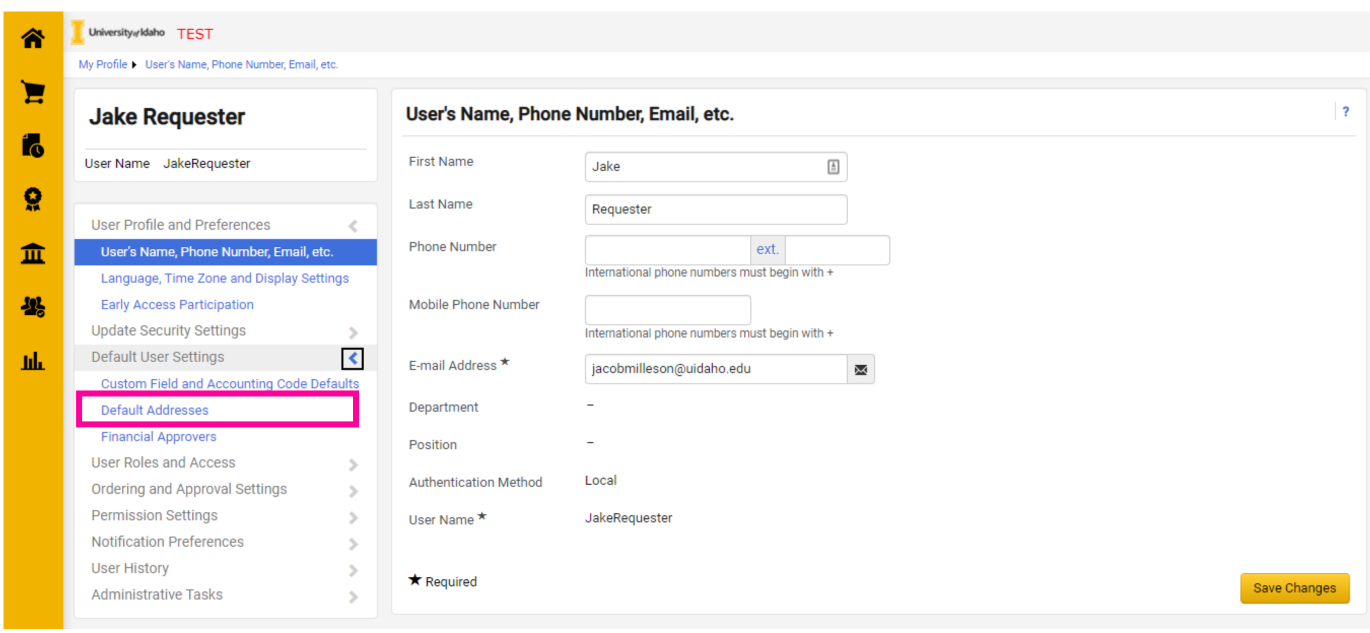
Once in your profile settings, use the left navigation to select “**Default User Settings**” to open the drop-down sub-options.



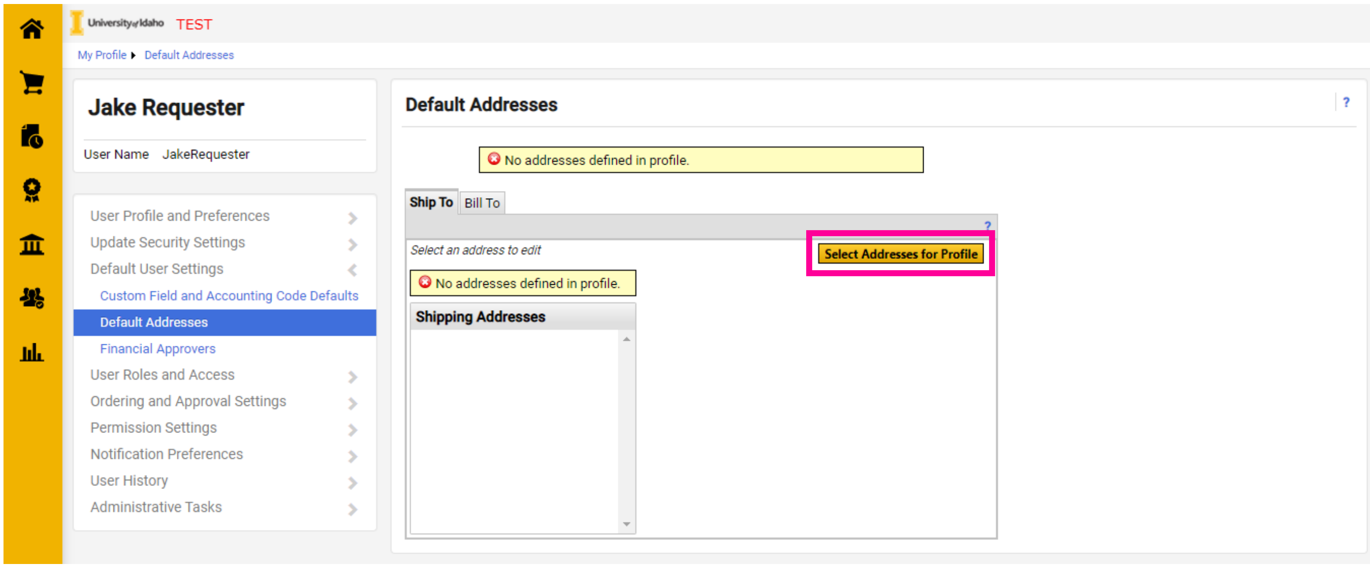
Default and Favorite Addresses

Once the sub-options open, select “**Default Addresses**” to select your default or favorite shipping address(es). This address will be the default across JAGGAER eProcurement.

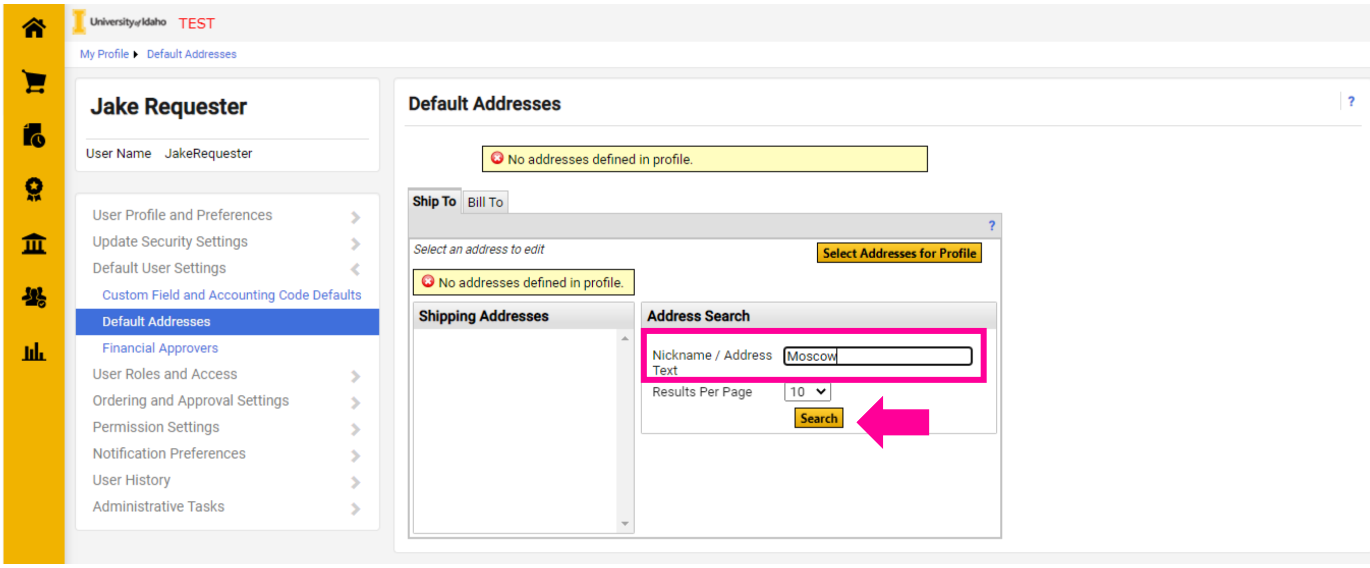
If you ship to more than one campus mail stop or one of our locations across the state, you can select several addresses and give them nicknames to help differentiate between them on the eProcurement platform.



Begin by clicking “**Select Addresses for Profile”** to open the address search box.

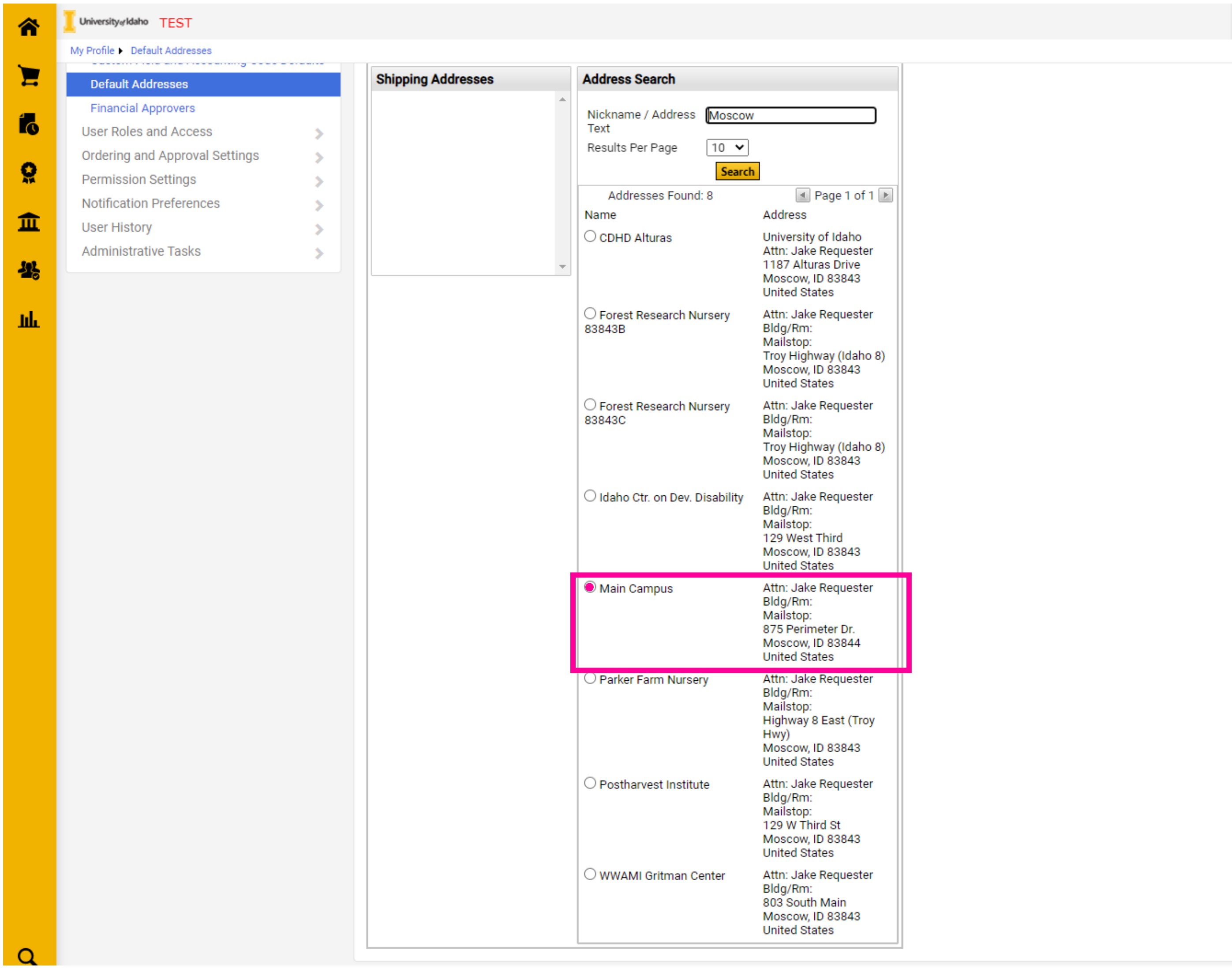


To search for an address, you can either begin with a keyword, such as “Moscow,” or press the “**Search**” button to see all addresses in JAGGAER.



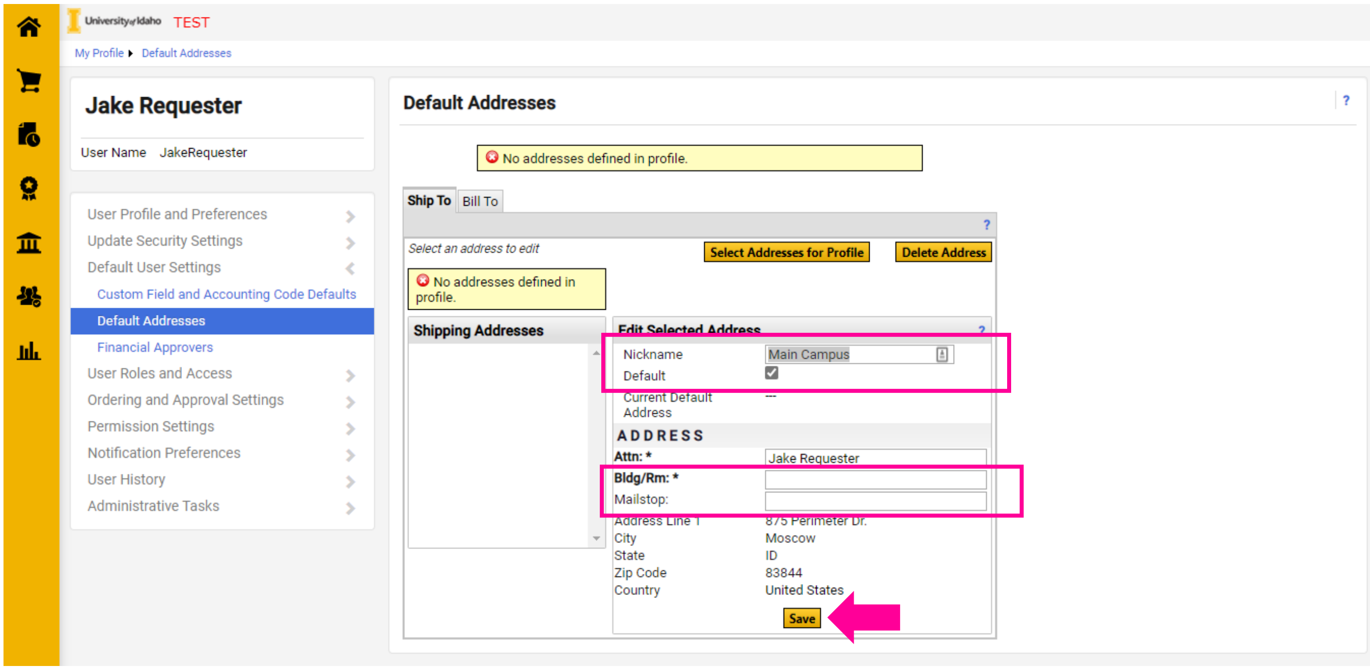
Here you can see we searched "Moscow," and we see Moscow addresses pulled from Banner. – For this example, we will use the Main Campus address.

Ship-to addresses are created in Banner and should not be changed to personal addresses. To request a new Ship To address, contact jaggaer@uidaho.edu.



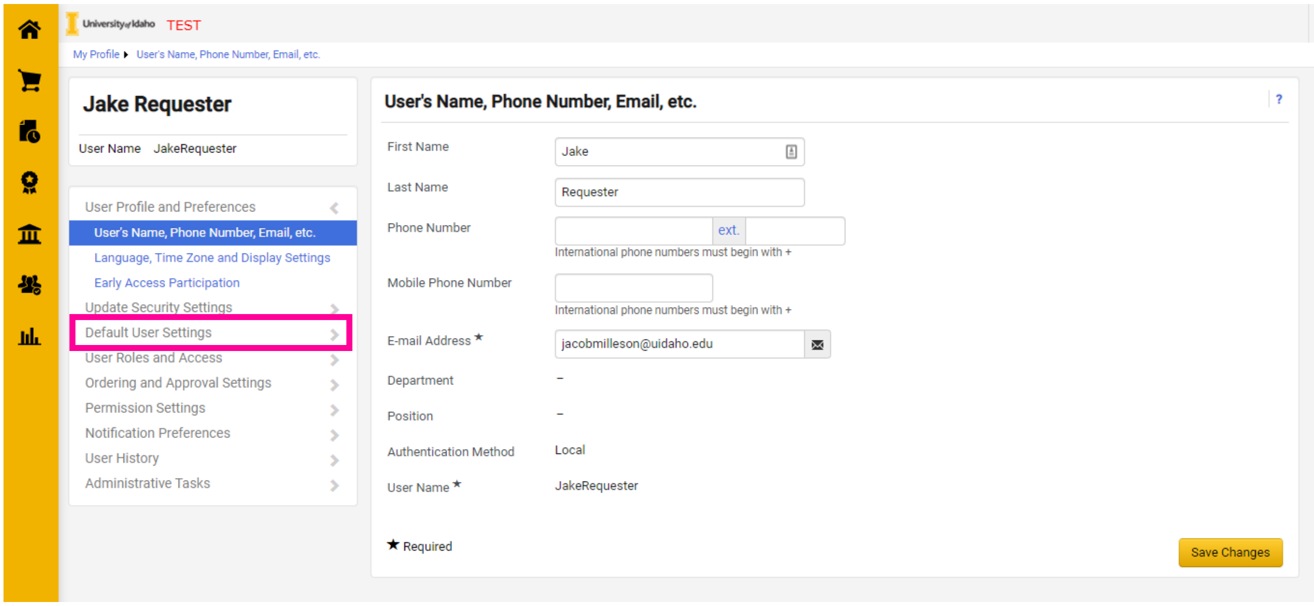
Once you select an address, you will need to give it a nickname.

You may also be asked to add your **Building/Room** and **Mail Stop code**. Please add this information as applicable to assist in the delivery from our colleagues at Campus Mail.

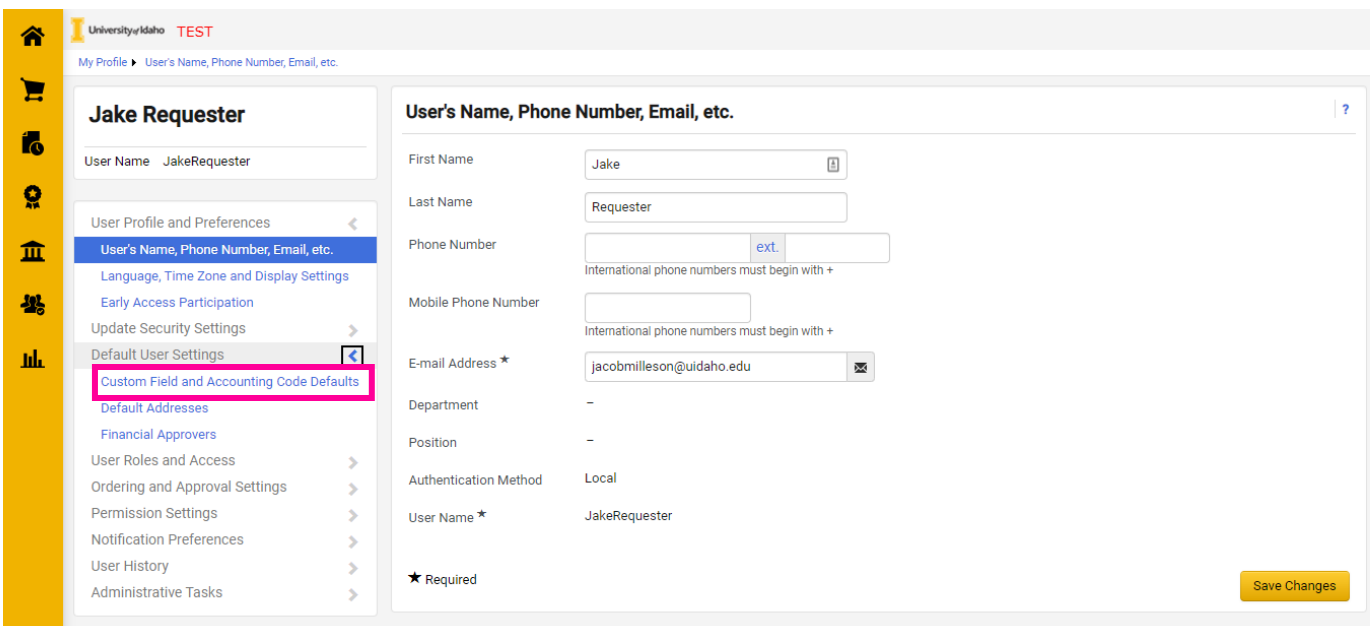


Default and Favorite Accounting Codes

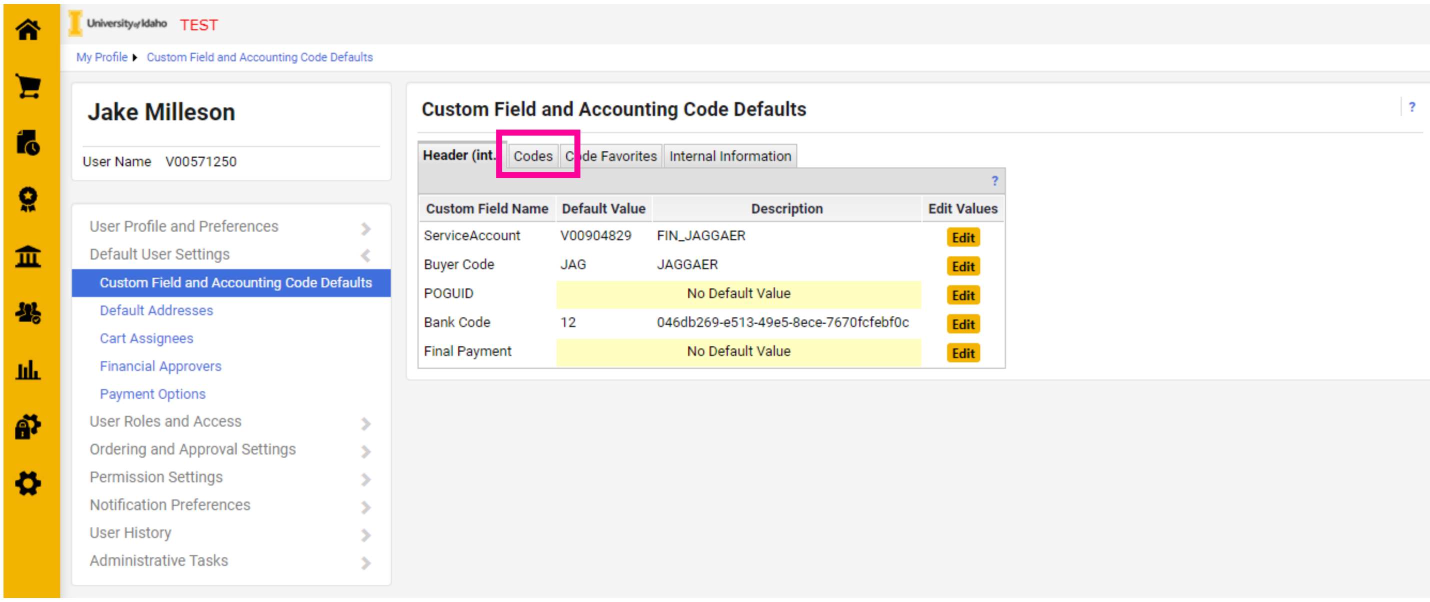
Once in your profile settings, use the left navigation to select “**Default User Settings**” to open the drop-down sub-options. *(See **JAGGAER User Profile**)*



Select “**Custom Field and Accounting Code Defaults**”

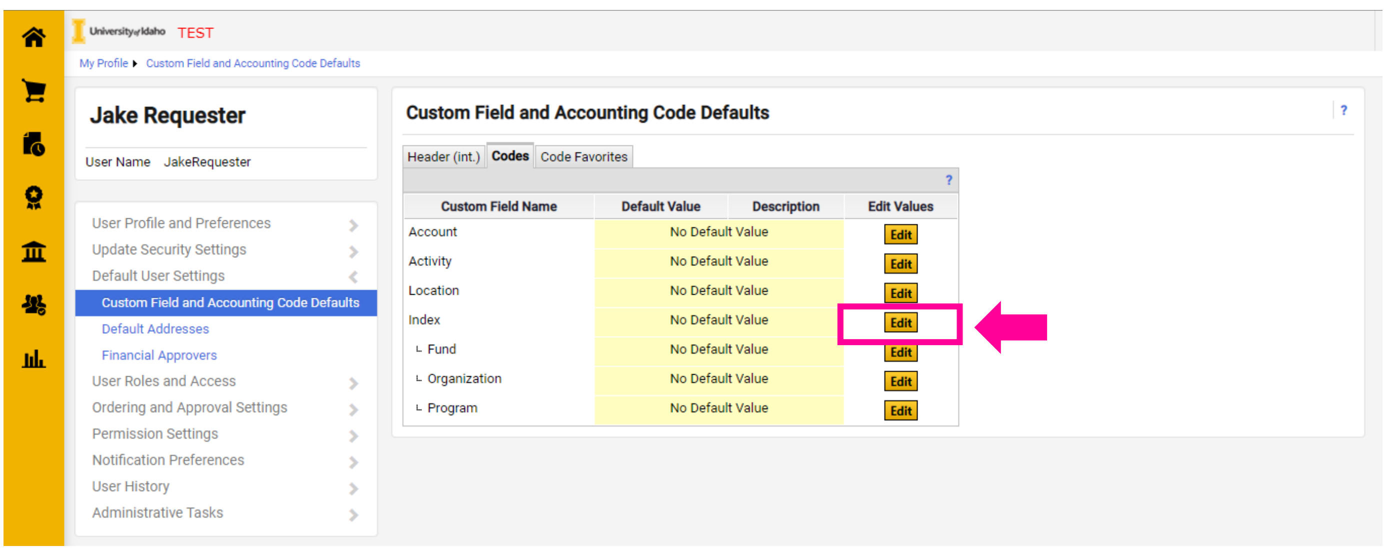


Select the “**Codes**” tab.



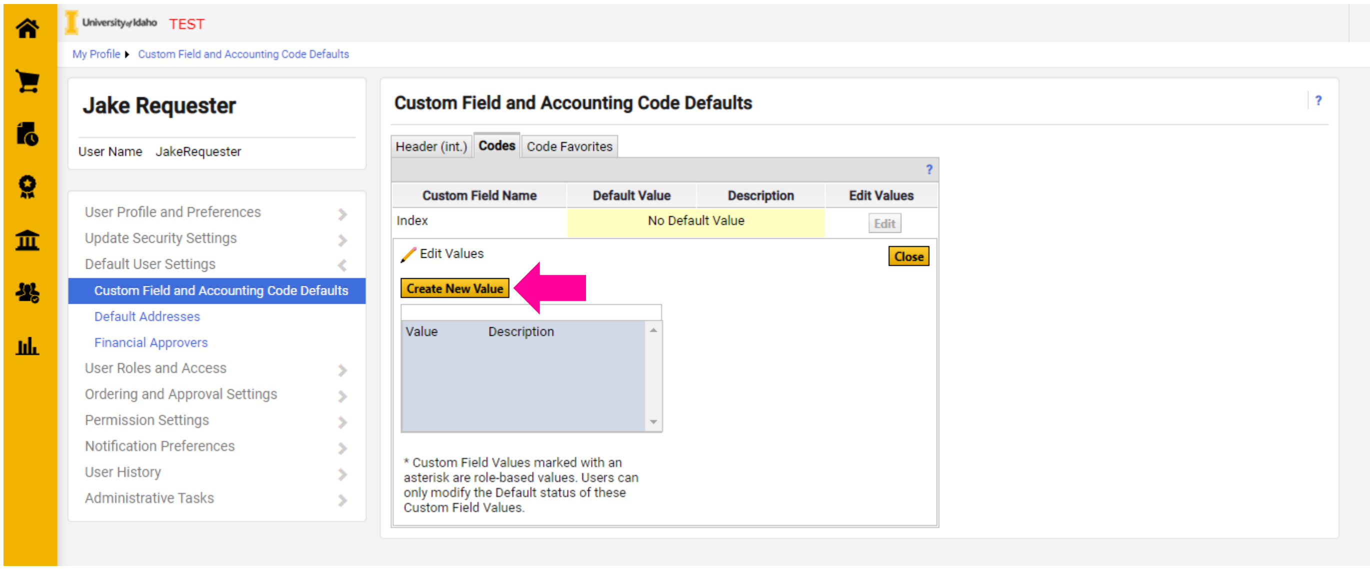
Here you can select your default or favorite Index(es). *JAGGAER will automatically fill in the Fund, Organization, and Program strings based on the index chosen during the check-out process.*

You can add a default or your favorite Activity Code(s) on this screen by clicking the appropriate “Edit” button.

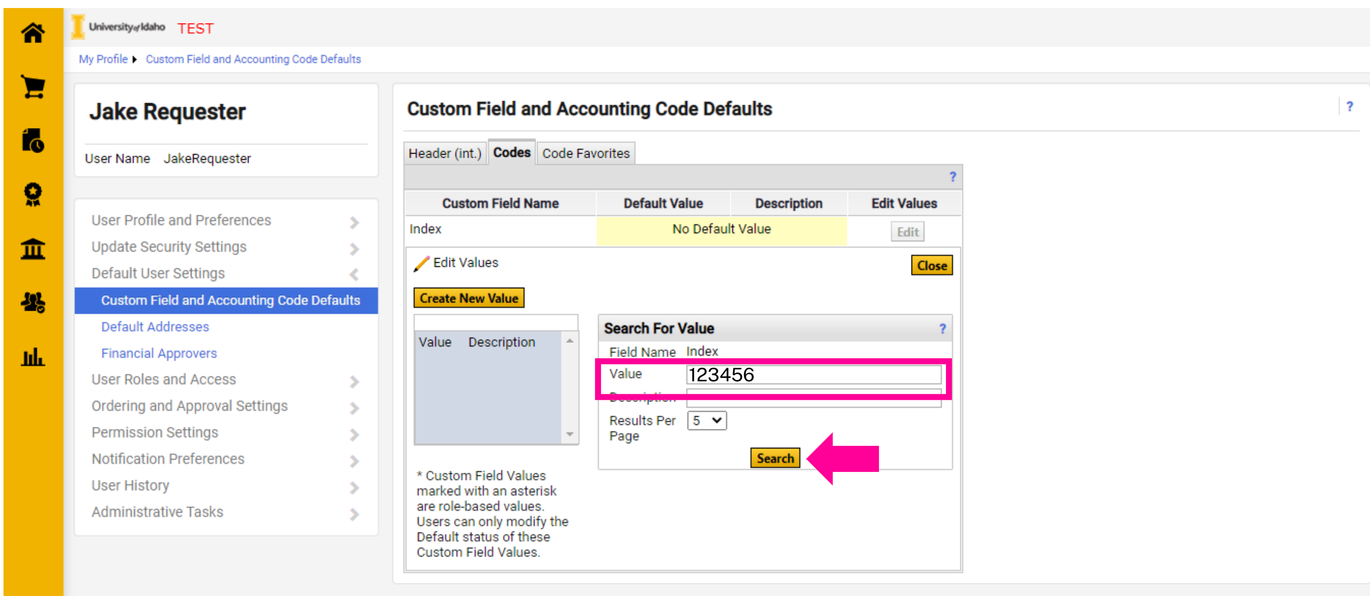


For example, to edit the default Index, we will select “**Create New Value.**”

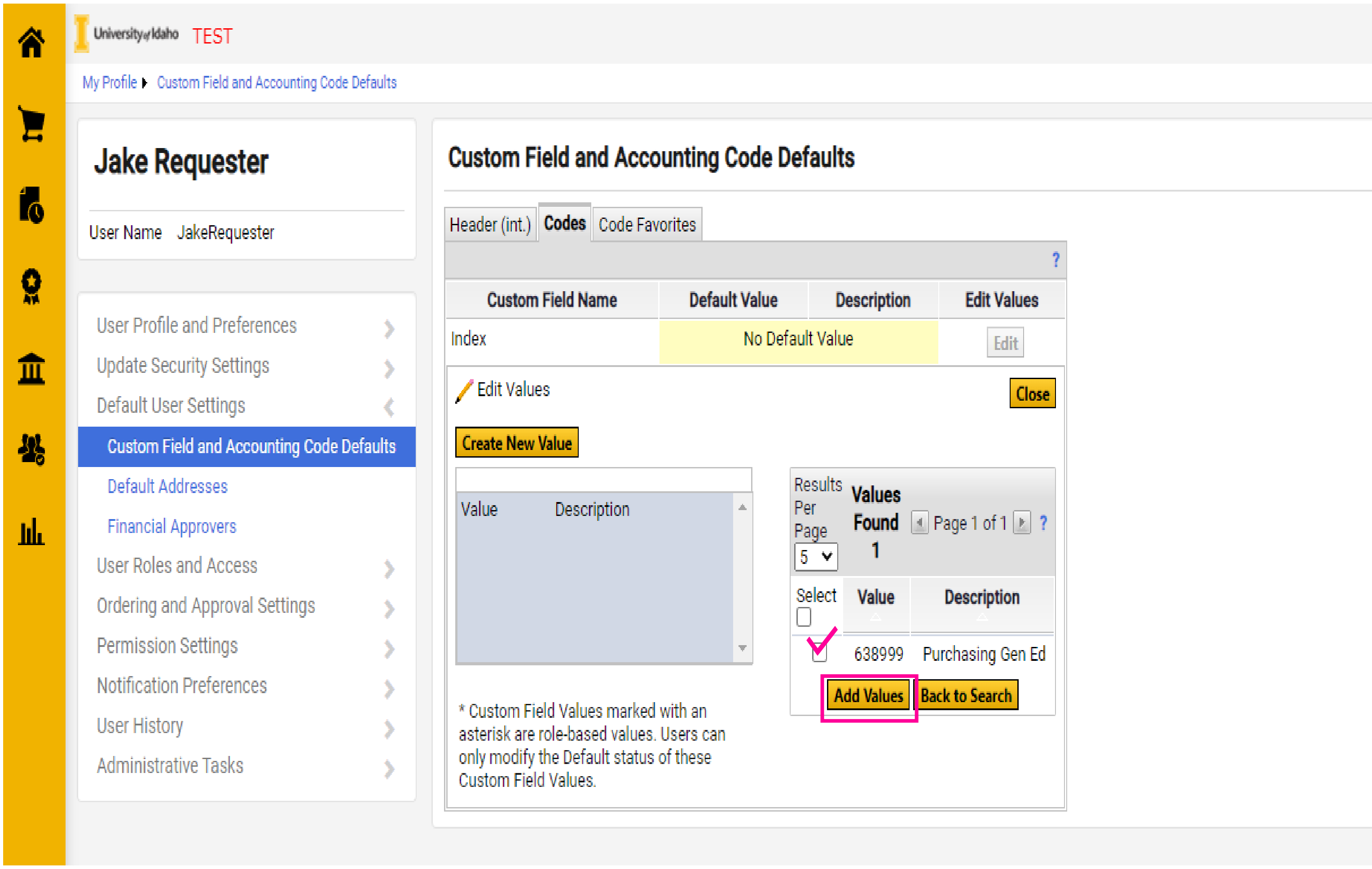
**This does NOT create a new Index – but will allow us to search indexes.*



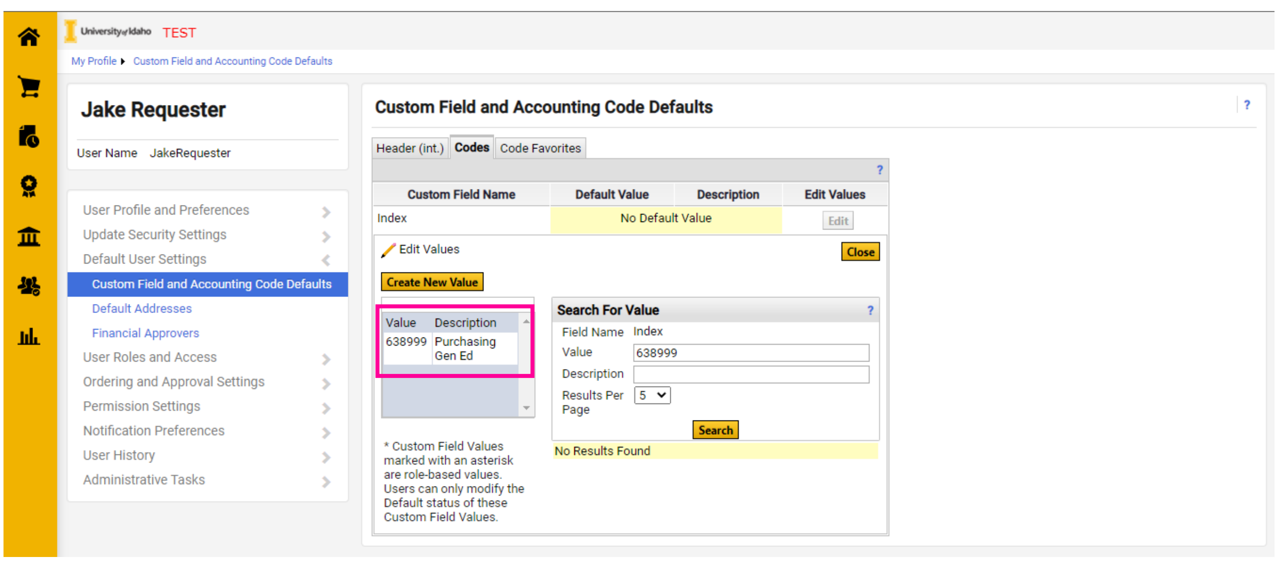
Search for your Index by typing your index number in the “**Value**” field and selecting **Search.**



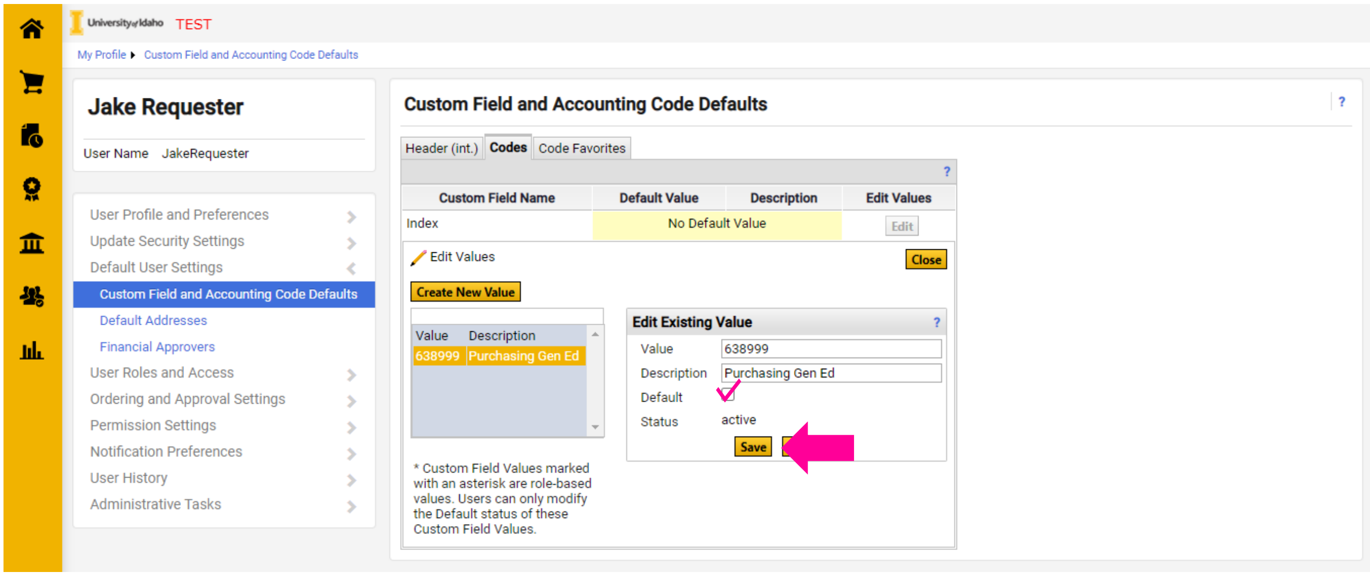
Once you find your index(es), mark the **checkbox(es)** and select "**Add Values**."



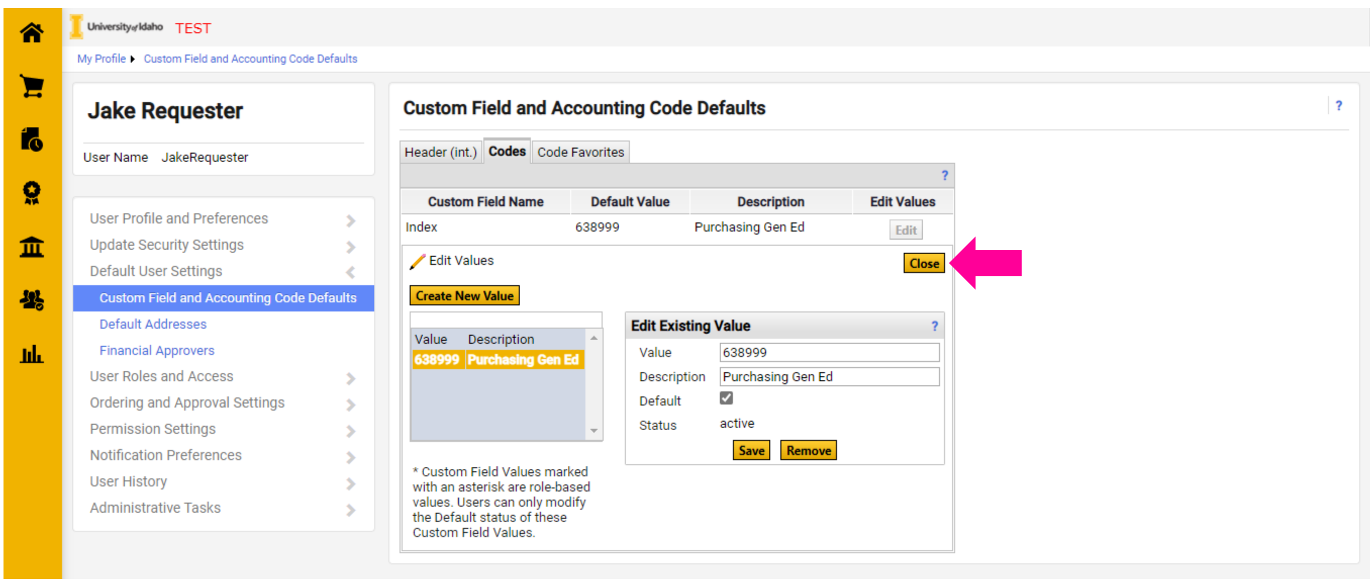
If you would like to select a default index. Click on the Index you wish to default from the values list.



Edit the current value by selecting the “**Default**” box and clicking “**Save**.”



You may now **close** the edit values box.

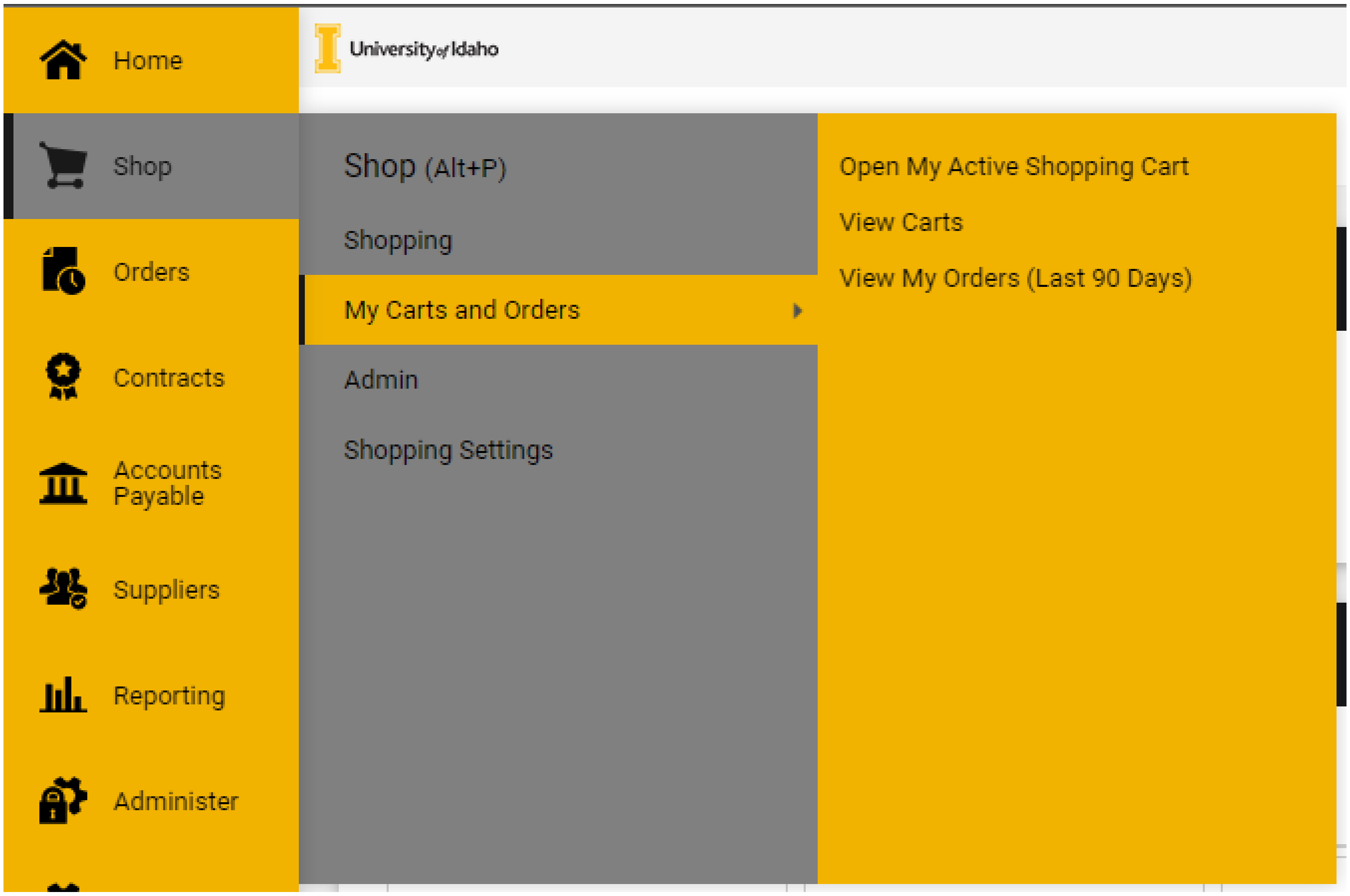


Searching for Carts, Orders and Documents

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*).

From any page, select **Shop > My Carts and Orders > ...**

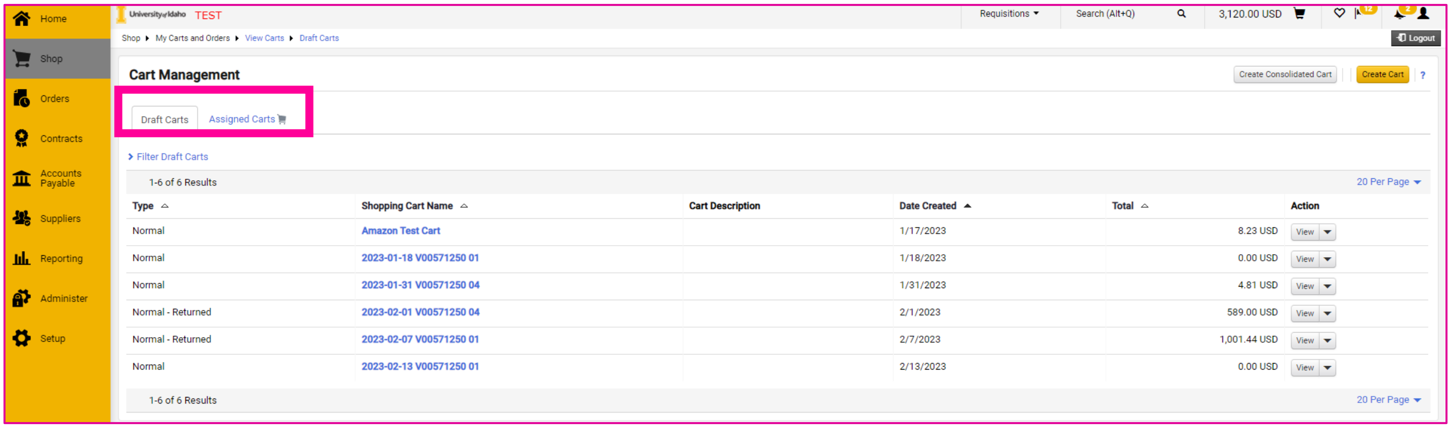
- **Open My Active Shopping Cart** – will show any cart that is in progress and not assigned.
- **View Carts** – will display both ***Active Carts*** and ***Carts Assigned.***
- **View My Orders** – will display orders you have created in the last 90 days.



View Carts (Cart Management)

Select **Shop > My Carts and Orders > View Carts**.

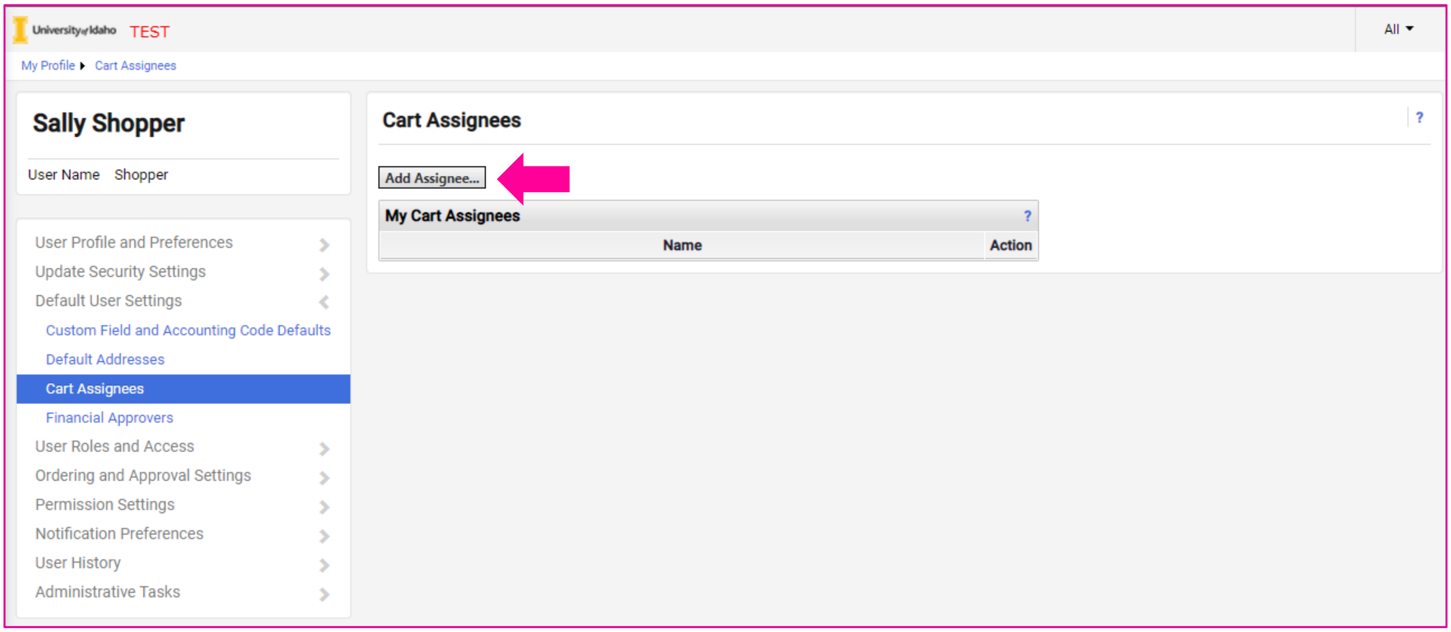
Here you can see both your draft carts, and carts you have created that are assigned to others for approval. You can switch between the different types from the different tabs.



Default Cart Assignees

Shoppers can designate favorite or default (preferred) cart assignees from their profiles by selecting **Default User Settings > Cart Assignees**.

Select **Add Assignee...** and search/select from the list.



To select a default, select **Set as Preferred**. This option is where the shoppers cart will go to by default (with the option to change) when assigning carts to requesters.

Section 2: eProcurement

University of Idaho

Introduction to JAGGAER eProcurement

Procurement is at the heart of JAGGAER. The eProcurement module consists of the **Shop** and **Orders** buttons found on the left-hand global navigation.

JAGGAER replaces the Requisition and Purchase Order functions of Banner. There are many things that are not changing, but there are some very exciting new features that JAGGAER brings to the University of Idaho.

What's new?

- The addition of "***PunchOut Vendors***".
    - Allow you to shop on the vendor's site and transfer your cart back to JAGGAER.
    - No bid or bid waiver is required for most PunchOut vendors.
    - Buy up to $50k without Contracts and Purchasing Services review from most PunchOut vendors.
    - Take advantage of contract prices and the buying power of U of I, BSU, ISU and LCSC combined.
    - Vendors such as Amazon Business, Fisher Scientific, ODP (Office Depot), Staples, VWR, and more.
- User-friendly interface
    - Allows you to track your orders from one screen.
    - See what stage of workflow your order is in, and what approvals are next.
- User roles
    - **Shopper** – faculty, staff, and grad students – have access to shop and create carts.
    - **Requester** – financial staff – finalize shopper's carts and submit orders.
- Streamlined approvals.
    - Requisitions and Purchase Orders go though one set of streamlined approvals.
- All orders begin as Requisitions.
    - Orders, regardless of dollar amount will begin as requestions before a Purchase Order is created.
- Purchase Order's sent via email or cXML integration.
    - No more printing and signing of POs.

What's similar?

- Most vendors will be "***Non-Catalog Vendors***"
    - Similar process to what occurred in Banner to create purchase orders.

What's the same?

- Purchasing Policies and Procedures
    - $1 - $10k – no bid required
    - $10k+ - Contracts and Purchasing Services needs to be involved.
    - See APM Chapter 60 for more information.
- Ability to use Pcard for purchases less than $5k, with the exception of PunchOut vendors.

PunchOut Vendors

What is a PunchOut Vendor?

A PunchOut vendor is integrated into the JAGGAER eProcuement system and connects directly to the vendor's website. It will look and behave like you are shopping on Amazon Business / VWR / Staples, etc.

PunchOut Vendor Benefits

PunchOut vendors have negotiated and discounted contracts with the University of Idaho, and you can benefit from the extra purchasing power of the combined Idaho four-year institutions. Orders placed from PunchOut Vendors will not require a bid, and orders less than $50,000 will not need to be reviewed by Contracts and Purchasing Services before being sent to the vendor. (Except for Amazon Business orders - $10k limit)

PunchOut vendors will also transmit the invoice directly into JAGGAER and will be automatically matched to the appropriate Purchase Order, reducing the paperwork needed to reconcile transactions.

Which vendors will be PunchOut enabled?

- **Amazon Business**
- **Anixter**
  - Wire and cable, networking, security and power supplies
- **B&H Photo/Video**
  - Digital cameras, photography equipment, TVs, audio-visual supplies
- **Fisher Scientific**
  - Lab equipment and supplies
- **Grainger**
  - Industrial-grade supplies and safety products
- **Henry Schein**
  - Healthcare products
- **Home Depot Pro**
  - Cleaning and janitorial, paper products, personal protection, plumbing, lighting
- **McKesson**
  - Medical supplies, and care management tools
- **Medline**
  - Medical supplies
- **ODP Office Solutions (Office Depot)**
  - Office supplies
- **Staples**
  - Office supplies
- **ThermoFisher Scientific**
  - Scientific instruments, reagents and consumables
- **VWR**
  - Life science products

More PunchOuts may be added as JAGGAER will help Contracts and Purchasing Services better understand which vendors/items are most procured.

Non-PunchOut Vendors

All other vendors the university does business with will be "Non-Catalog" vendors. Vendors marked as active in Banner and the University has done business with in the past 36 months will be populated in this way. See the section ***Non-Catalog Vendors*** for more information.

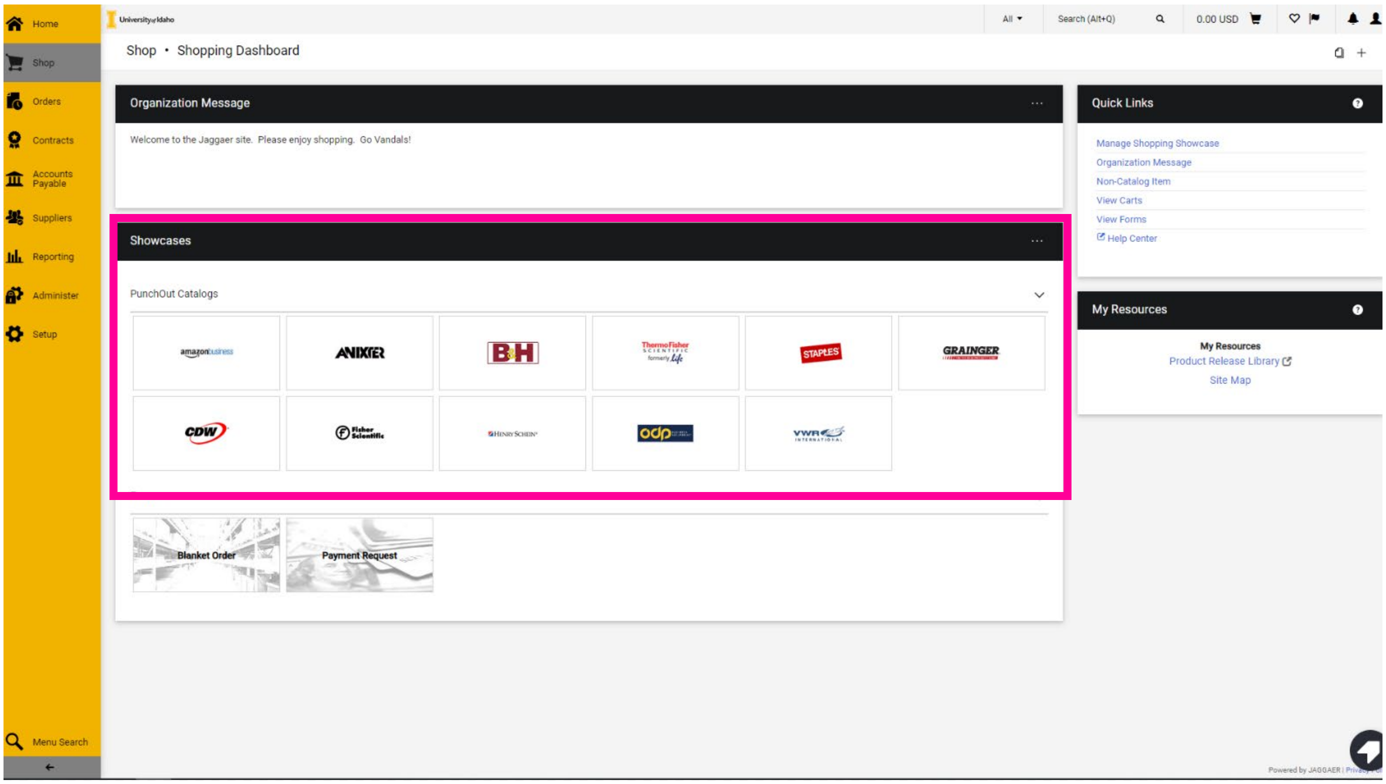
Placing a PunchOut Order

To place an order through a PunchOut vendor, visit the PunchOut section of the shopping dashboard. To PunchOut, click on the vendor you want to shop from.

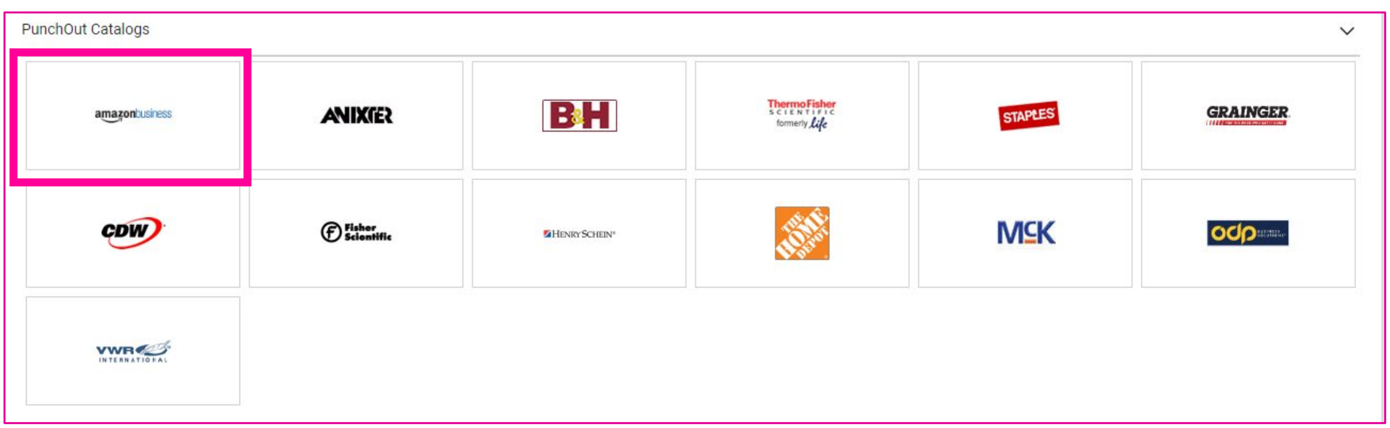
Example Amazon Business Order

For this example, we will walk through the Amazon Business PunchOut. All vendors are relatively similar, depending on the webpage layout.

To see an example for any of the other PunchOut vendors, please get in touch with purchasing@uidaho.edu.

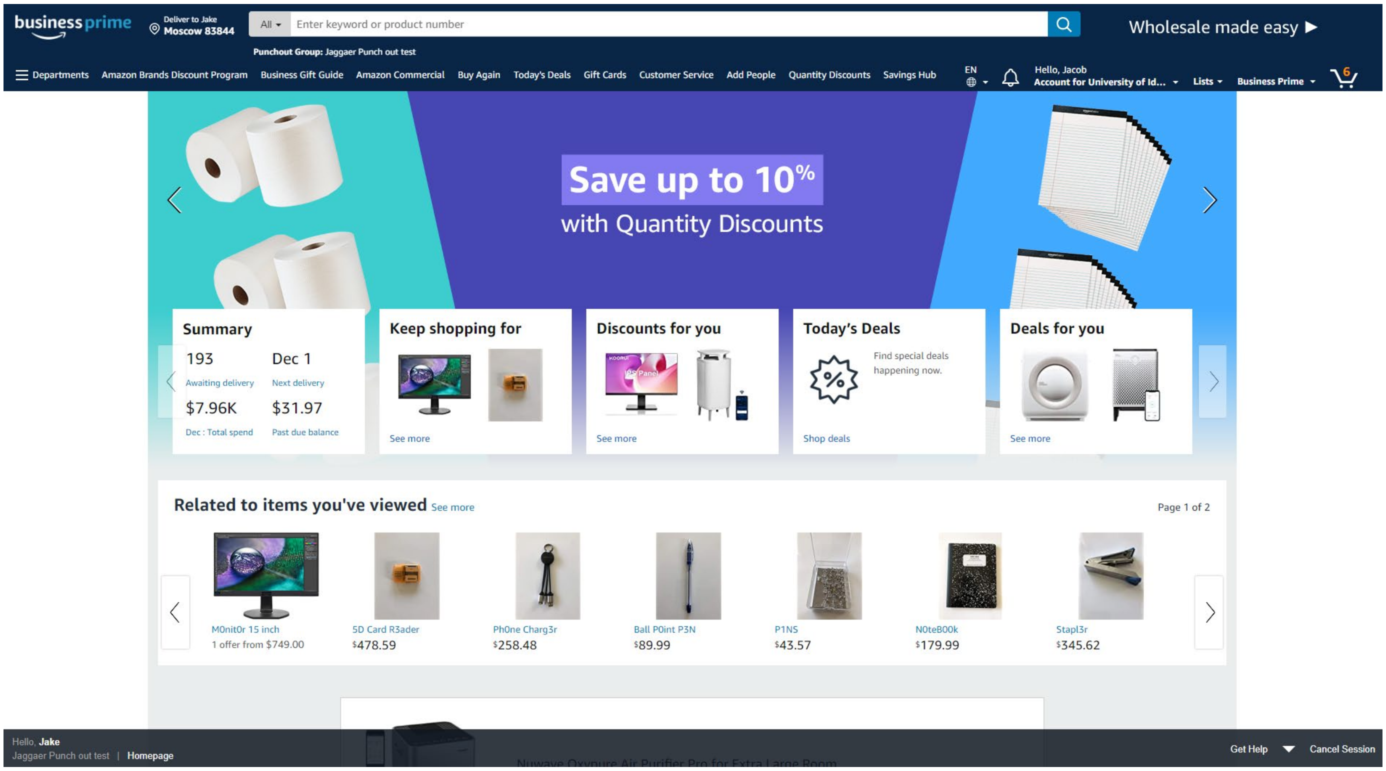


Select the **Amazon Business** tile to begin the PunchOut.

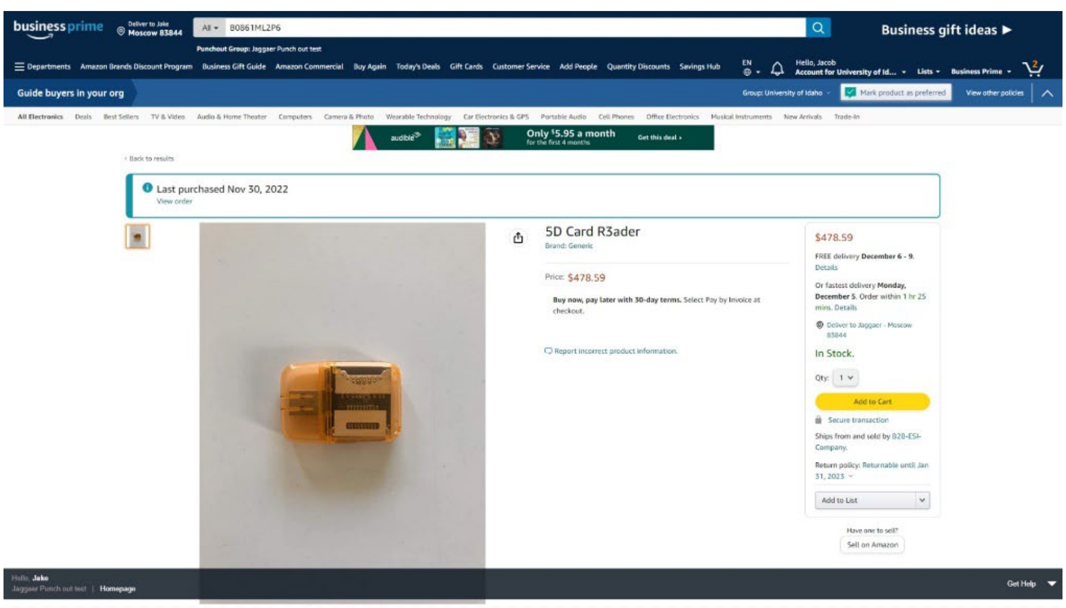


Selecting the tile will open Amazon Business in a new tab or window. Some PunchOuts will open in the current tab. *You may need to enable pop-ups from JAGGAER.*

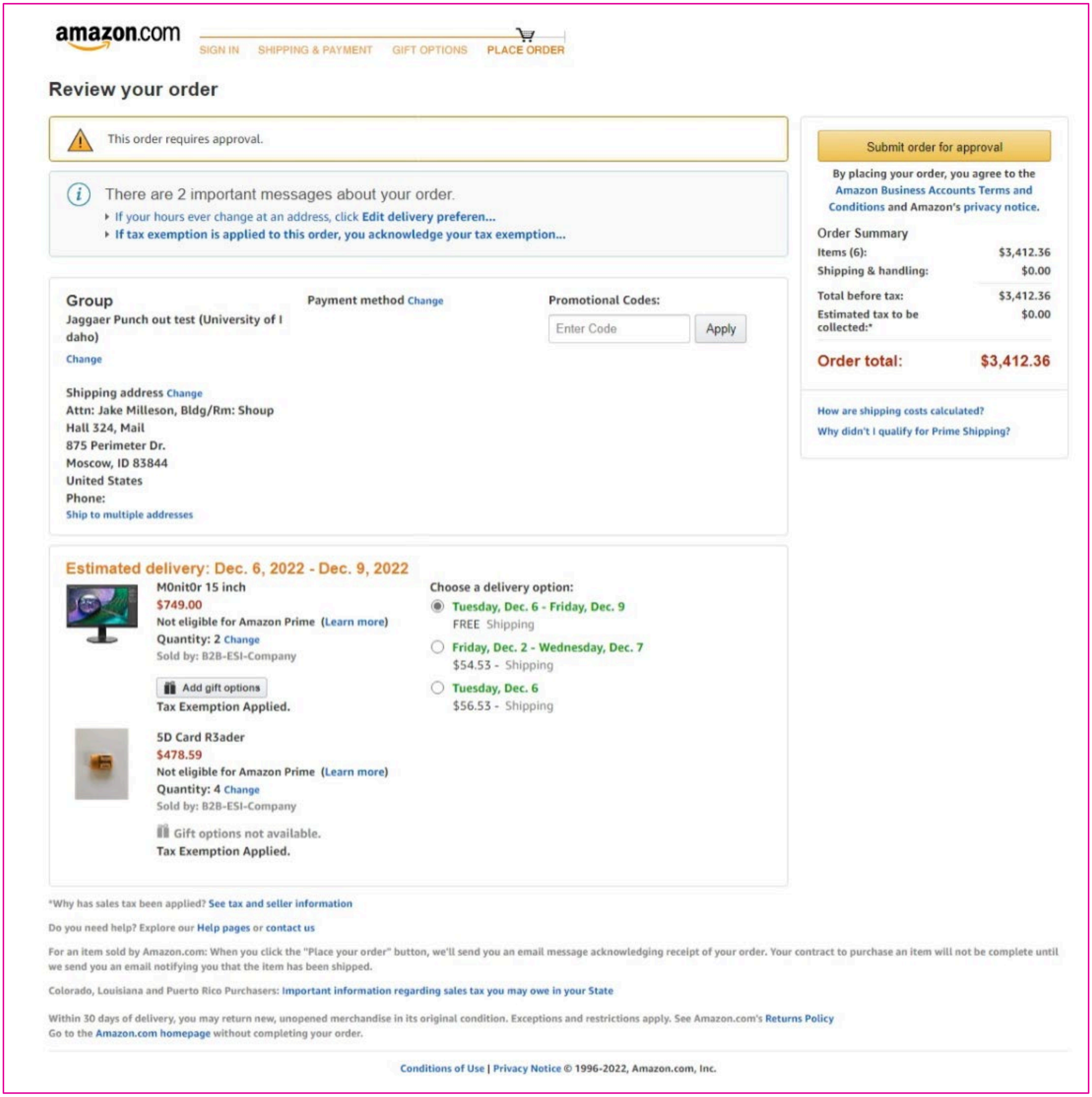
Here you can see that the Amazon Business PunchOut opened in a new window and looks like a typical Amazon Business homepage.



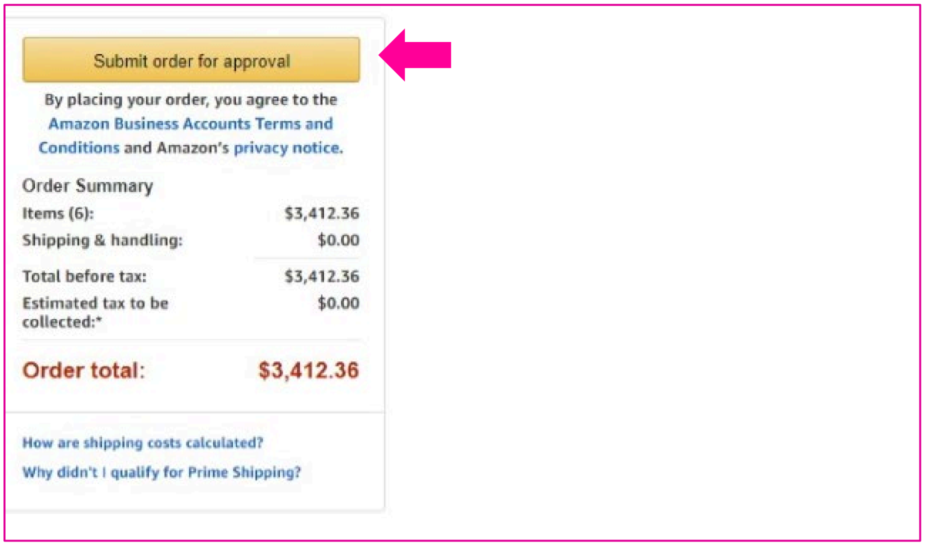
Find an item you are looking for and add it to your Amazon shopping cart. For this example, we will purchase a few sample items from Amazon Business.



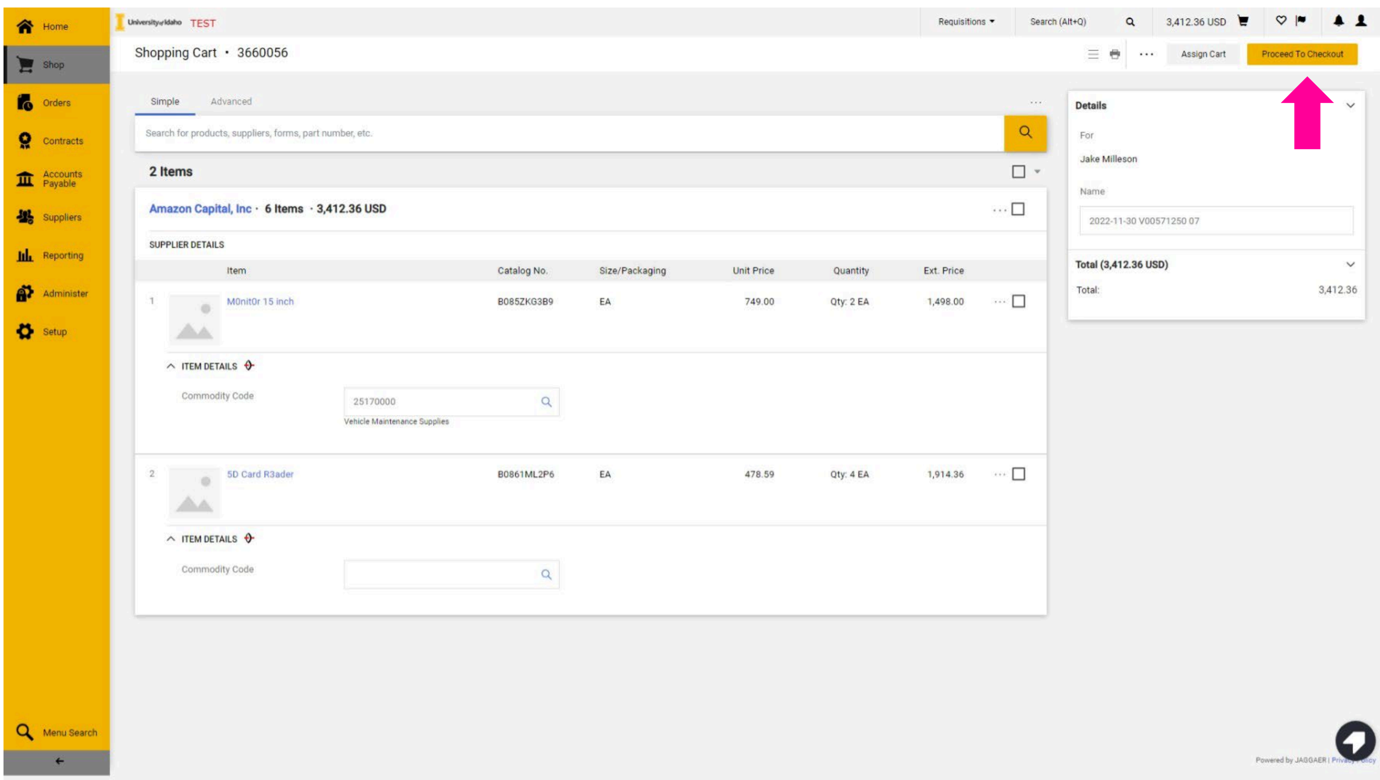
Once you have added your items to your Amazon Business cart, you will have a chance to review your order and order options before returning to JAGGAER.



Once you have reviewed your order and do not need to make any changes, select the “**Submit order for approval**” button to return your cart to JAGGAER.



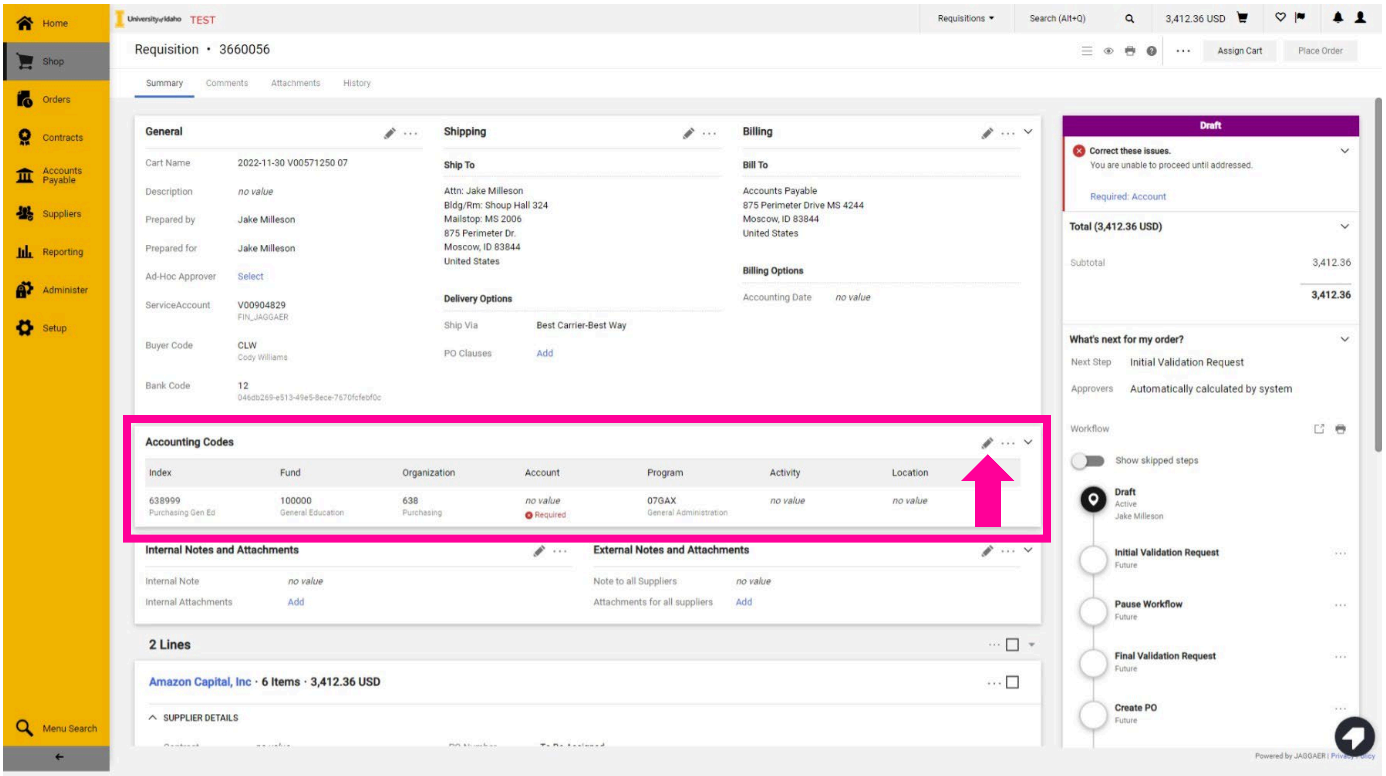
Once you return from your PunchOut to the JAGGAER system, you will see the line items in the center of the screen, with order details to the right.



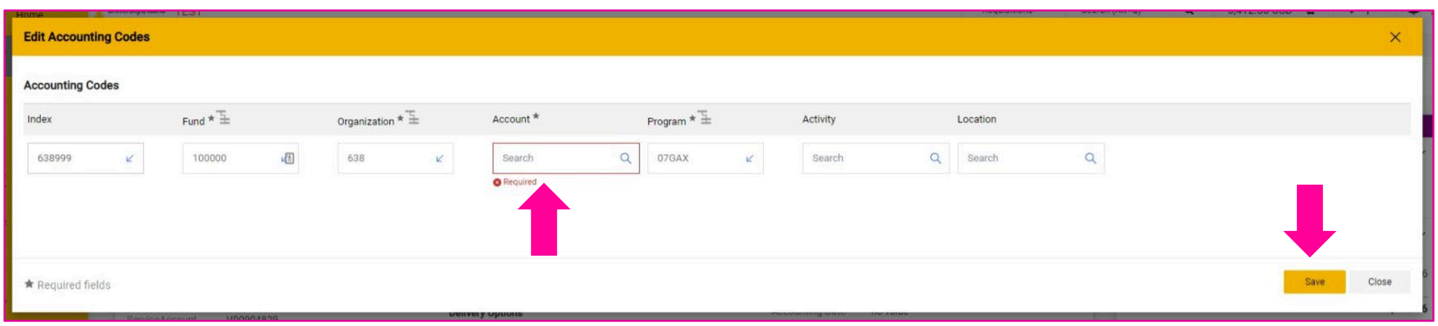
On the top right side of the screen, you will see two buttons, “**Assign Cart**” and “**Proceed To Checkout.**” – Select “**Proceed To Checkout.**”

NOTE: *Only designated financial staff – called “Requesters” in the JAGGAER system -- can place an order.*

After proceeding to checkout, you will need to confirm your shipping information and accounting codes. Use the pencil ✏ icon to edit your shipping information or accounting codes.



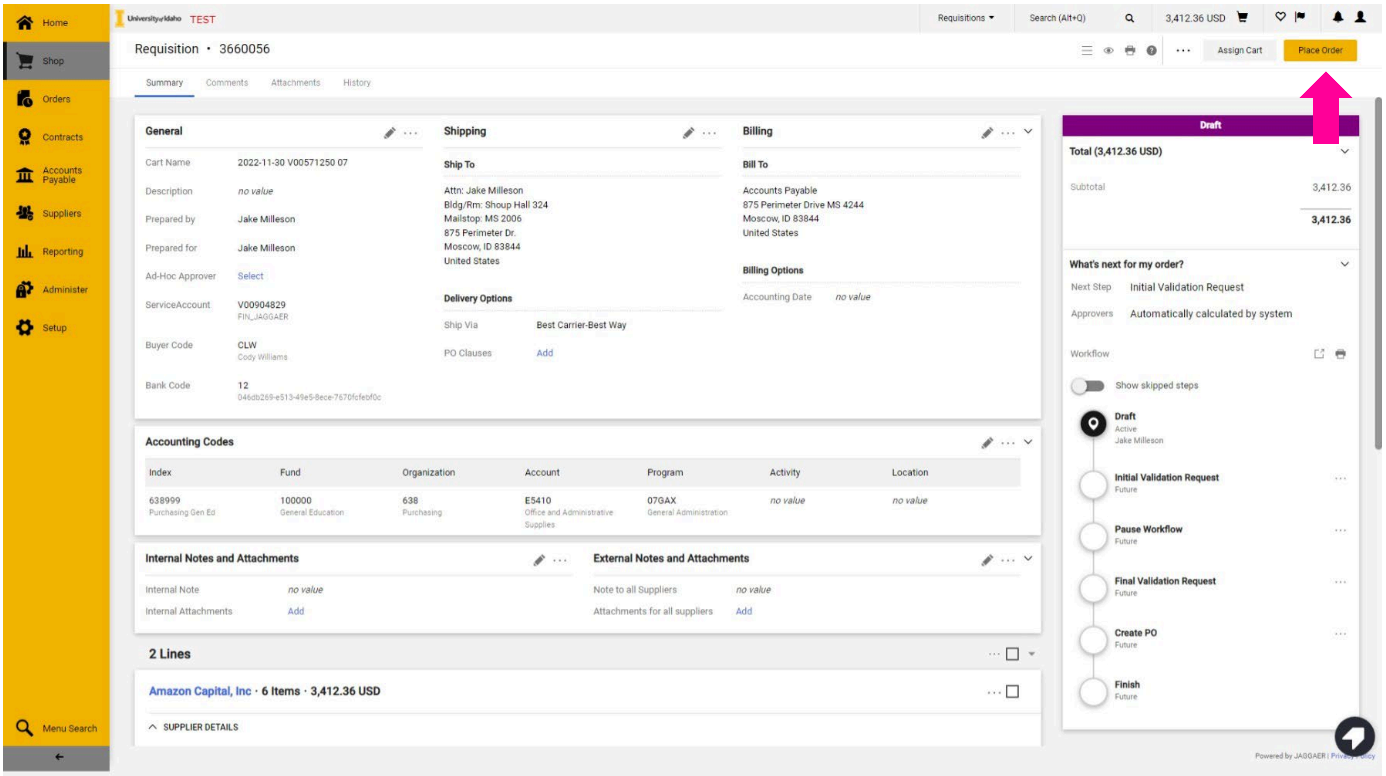
You must complete at least one accounting line before placing the order.



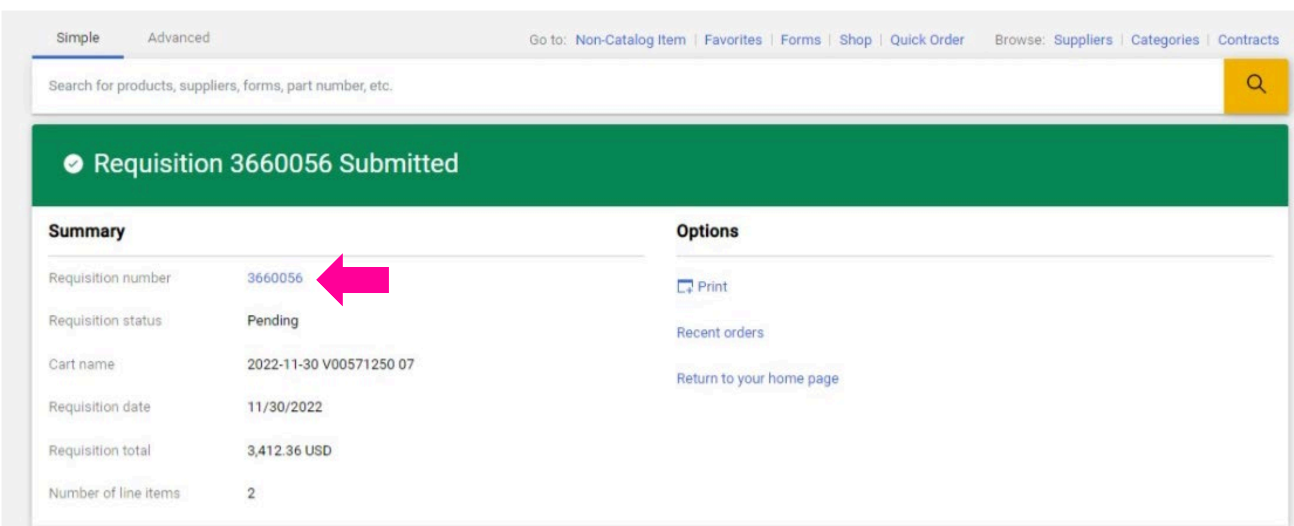
If you have set up ***Default Accounting Codes,*** they will populate here. Complete the accounting string by adding the appropriate Account and Activity code if desired. If you need to add more than one index or accounting string, see ***Adding multiple Accounting Codes to a JAGGAER transaction.***

Once you have reviewed the information on the requisition screen, you can assign the cart for approval if you are a "Shopper," or if you have the "Requester" role in JAGGAER, you can place the order.

NOTE: *Shoppers will not see the option to place orders and must assign their cart to the appropriate Requester for their department.*



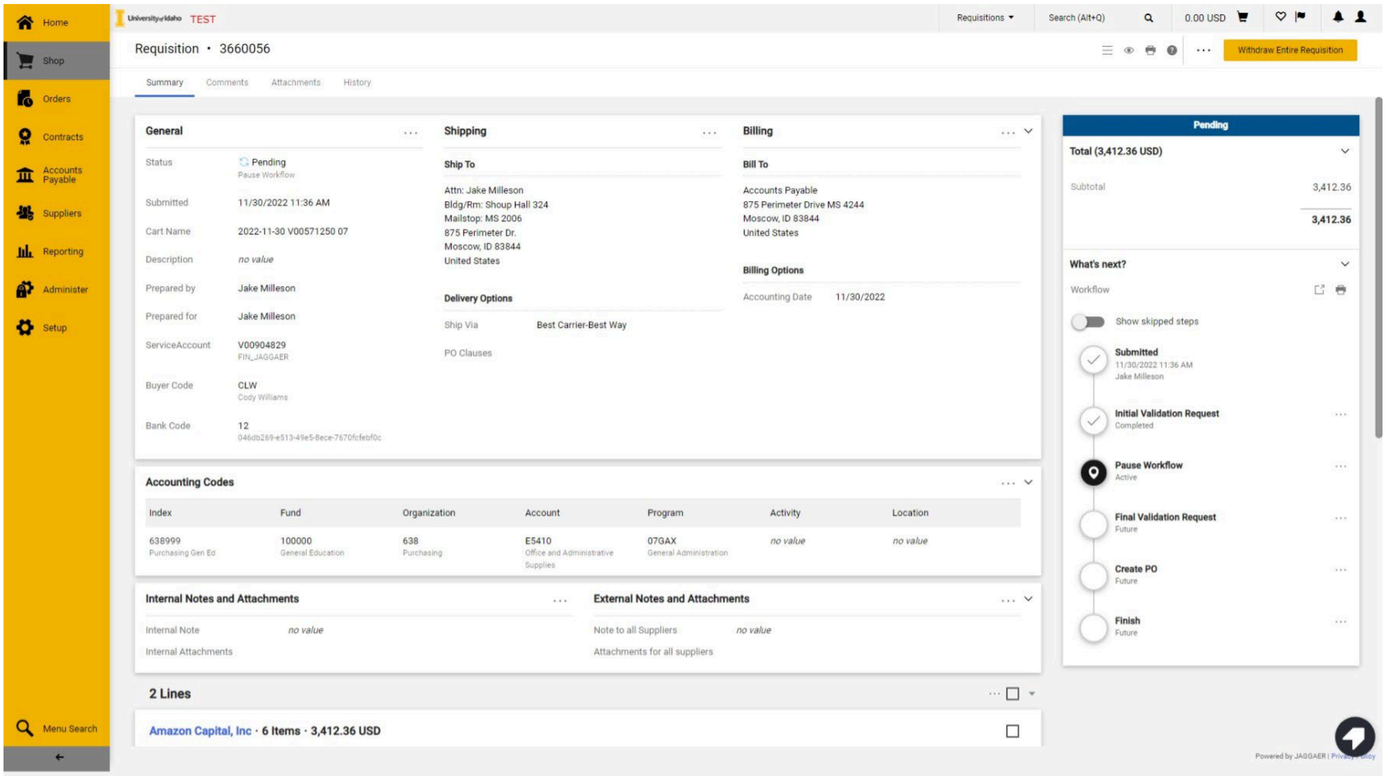
Once the Requisition is submitted, you can click on the requisition number to view the requisition status.



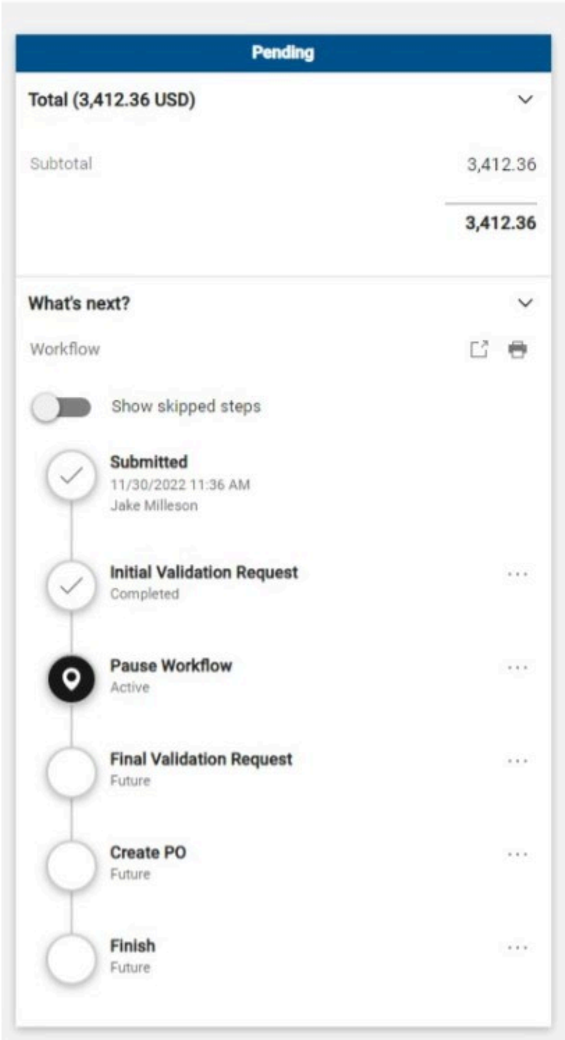
PunchOut Requisitions

Once a requisition has been submitted, you can view the status using the requisition number to find the order.

You can also find recent requisitions by using the global left-hand menu. Go to **Orders** > **My Orders** > **My Requisitions** to see a recent list of orders you own.



In the requisition menu, you will see different steps that the requisition will take. The “Pause Workflow” steps allow JAGGAER to communicate with Banner. Most pause steps are about a minute in length but can take up to five minutes in some scenarios. You can refresh your browser tab to get an update on what stage your requisition is in.



NOTE: *You will see a temporary placeholder PO number while JAGGAER receives a number from Banner. – Banner PO numbers begin with a P and are followed by two zeros and five numbers (P0012345 or, in this example, P0064571).*

(LEFT) Here we can see that the requisition is Pending and is working through its workflow.

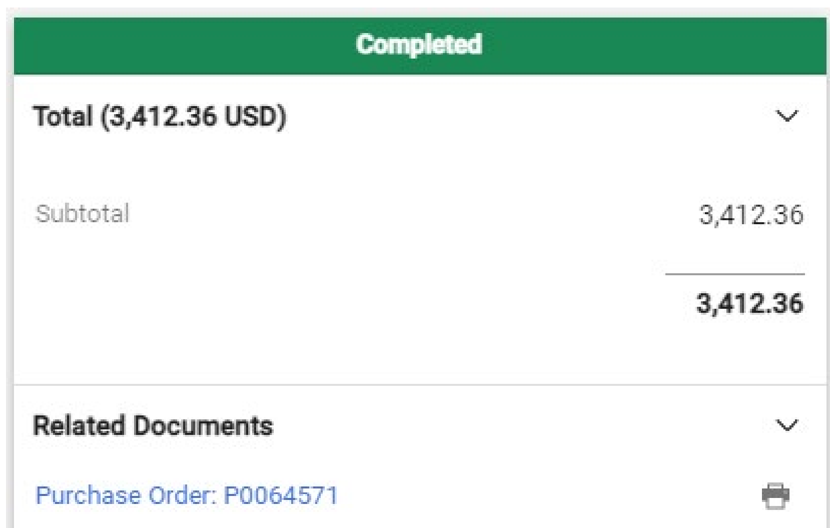
You may see additional steps here, such as:

- NSF Review
- Grant Approval
- Special Approval
- Procurement Approval

These steps are determined based on rules in the system. For a list of common rules, see ***General Procurement Rules and Guidelines***

(BELOW) Once the requisition has been completed, JAGGAER will populate a PO number, and the status bar will turn green.

You can access the PO directly from the **Related Documents** section of the status menu by clicking on the number.

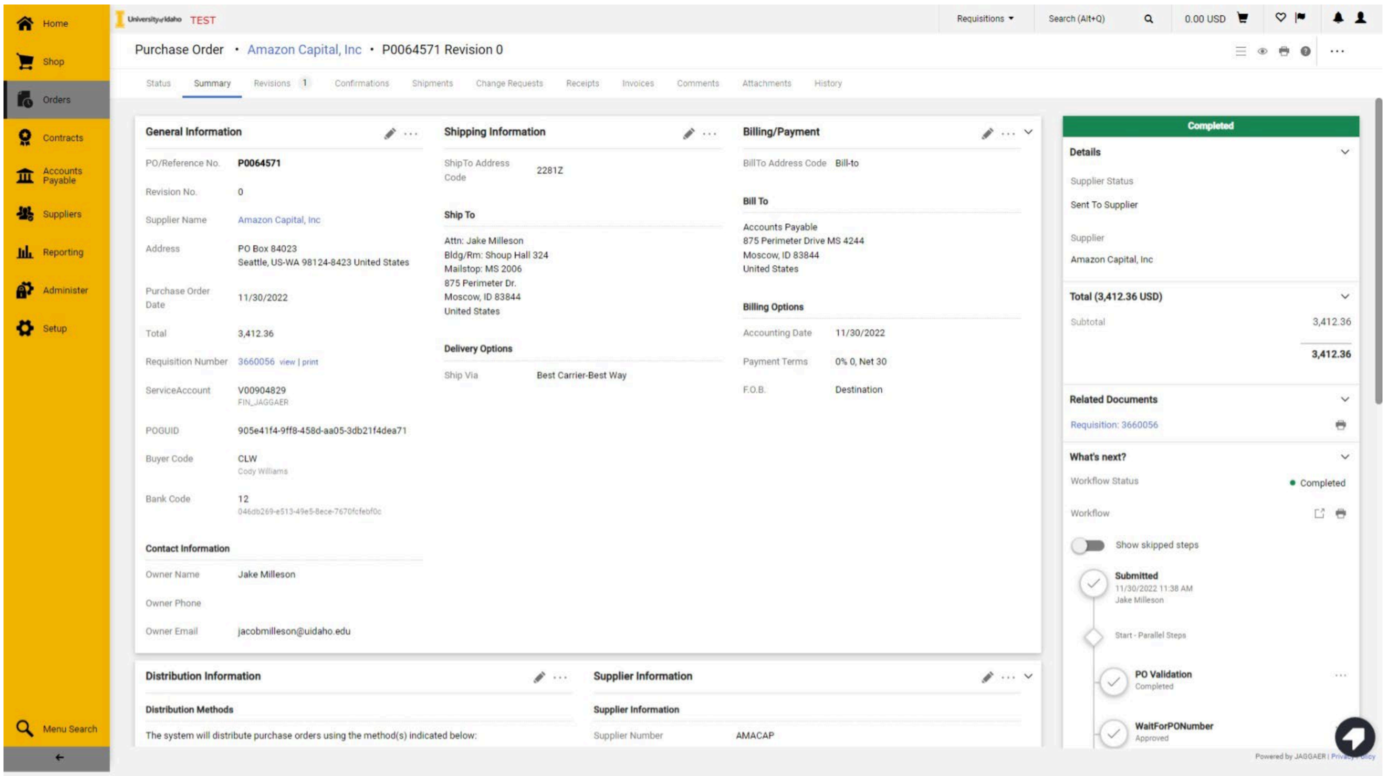


PunchOut Purchase Orders

Once a requisition has been completed, you can view the Purchase Order (PO) status by using the requisition number to find the order.

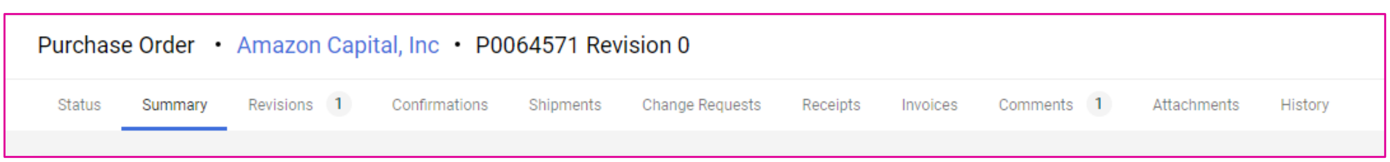
You can also find recent Purchase Orders by using the global left-hand menu. Go to **Orders** > **Orders** > **My Purchase Orders** to see a recent list of orders you own.

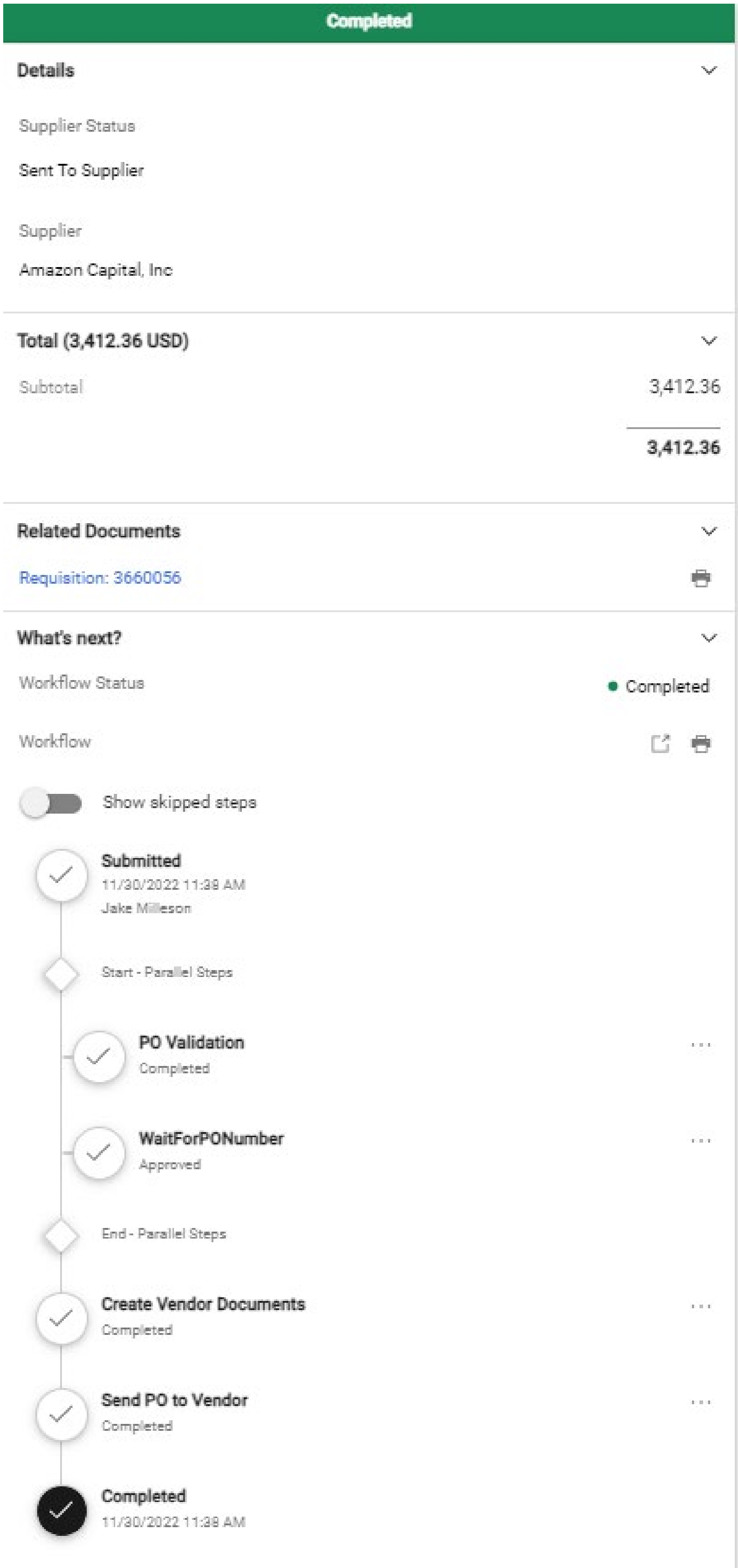
NOTE: *You will see a temporary placeholder PO number while JAGGAER receives a number from Banner. – Banner PO numbers begin with a P and are followed by seven digits. (P0012345 or, in this example, P0064571).*



On the Purchase Order screen, you will see the status bar to the right with the next steps, much like requisitions. Across the top, you will see a ribbon of options such as Status, Summary, Revisions, etc.

Purchase Order Ribbon example:





(RIGHT) Here we can see that the Purchase Order to the PunchOut vendor has been completed and sent the PO to the vendor.

PunchOut vendors are integrated and sent using cXML files. These automatically populate into the vendor's system, so your order is already on the way!

You will also receive an Order Confirmation email from most PunchOut vendors.

Test order placed "M0nit0r 15 inch" and 1 other item

Amazon.com <no-reply@amazon.com>
To Milleson, Jake (jacobmilleson@uidaho.edu)

Reply | Reply All | Forward

Wed 11/30/2022 3:08 PM

If there are problems with how this message is displayed, click here to view it in a web browser.

amazon business

Order Information

Purchase Order / Reference: P0064571
Amazon order # 114-9757208-7017804

Hello Jacob Milleson,

Thank you for shopping with Amazon Business. Your order has been successfully placed and will soon be shipped. Specific order details are below. If you would like to view the status of your order, please visit Your Orders on Amazon.com.

Items that will be shipped

5D Card R3ader

4 at $478.59 **$1,914.36**

M0nit0r 15 inch

2 at $749.00 **$1,498.00**

Order details

Amazon order # 114-9757208-7017804

Request received on Wednesday, Nov 30, 2022
Purchase Order / Reference: P0064571

Ship to
Jake Milleson/MS:MS 2006
University of Idaho
875 Perimeter Dr.
Bldg/Rm:Shoup Hall 324
Moscow, ID 83844
United States

Estimated Delivery Date - Standard Shipping
Tuesday, Dec 6, 2022 - Saturday, Dec 10, 2022

Buyer
Jacob Milleson on behalf of University of Idaho

Summary
Items (2): $3,412.36

Non-Catalog Vendors

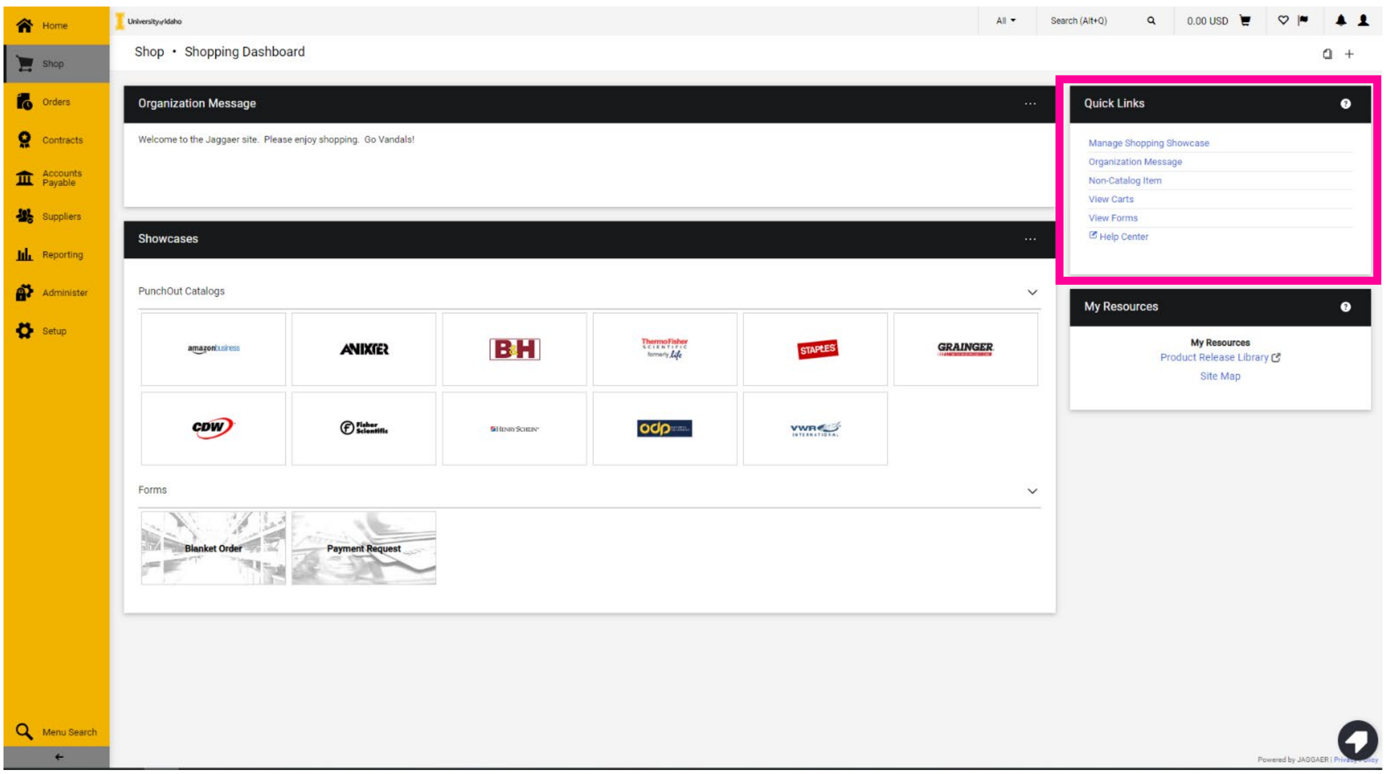
What is a Non-Catalog vendor?

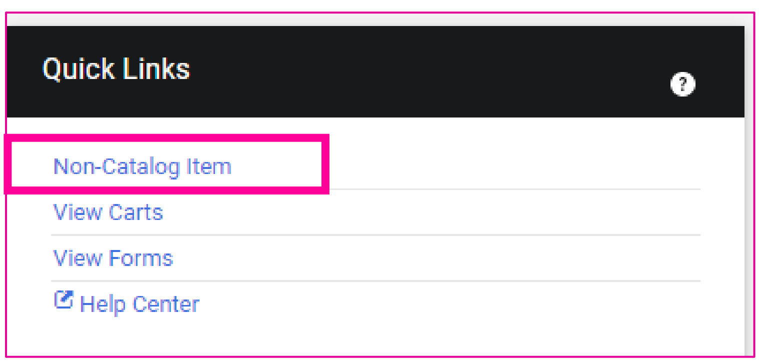
The University of Idaho issues Purchase Orders (POs) to over 3,000 vendors each fiscal year. Most of these vendors will be available as Non-Catalog Vendors. – This means that their catalog of products and services is not integrated into the JAGGAER system like ***PunchOut Vendors*** are.

Creating a Non-Catalog Order

To place an order with a Non-Catalog vendor, select “**Non-Catalog Item**” from the “**Quick Links**” section of the Shopping Dashboard.

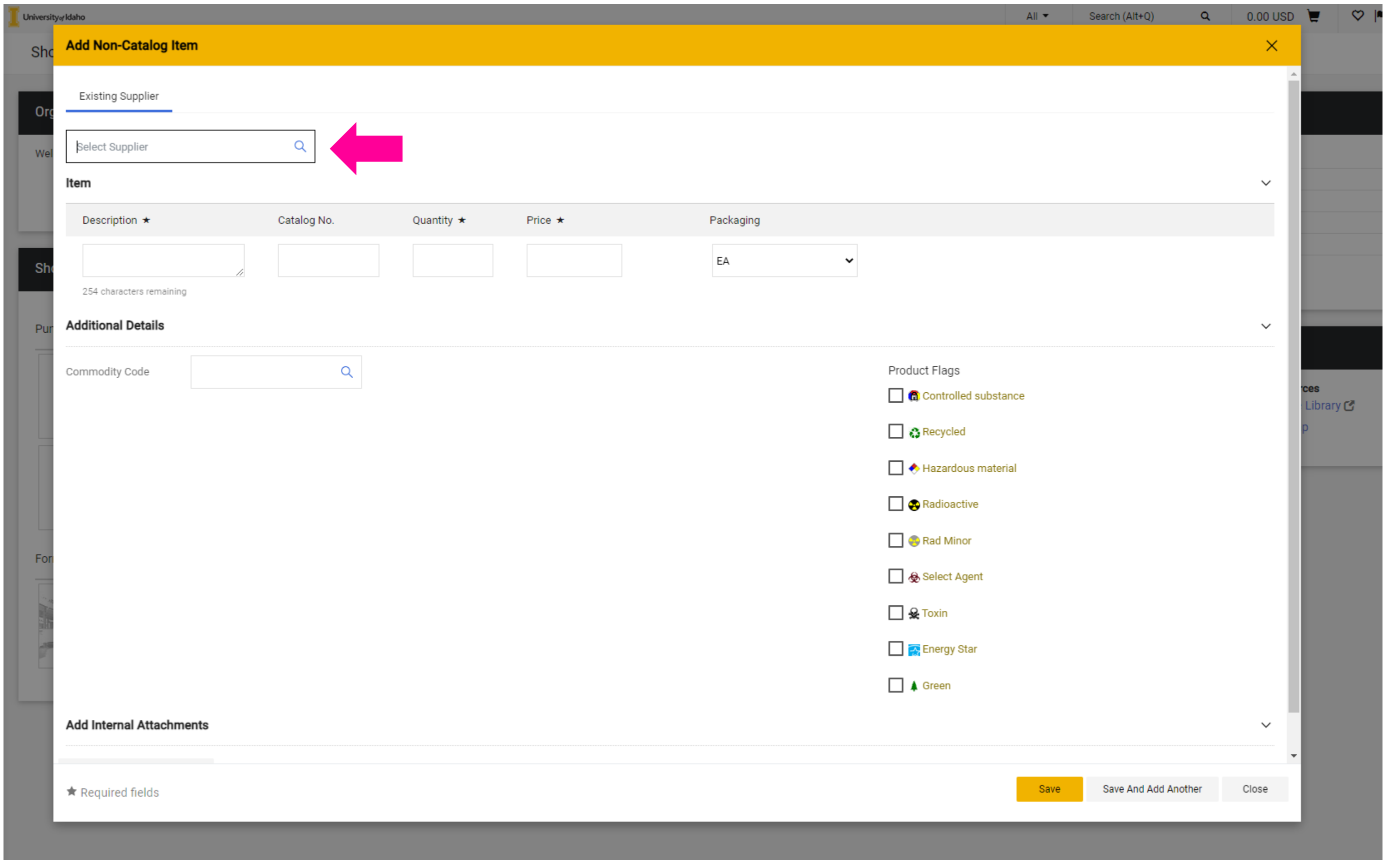
You can also begin a Non-Catalog Order by using the global left-hand menu. Go to **Shop** > **Shopping** > **Non-Catalog Item**.





NOTE: *The vendor you will be placing an order with will need to be an active vendor in Banner. If they are not an active vendor, you will need to invite them via PaymentWorks. If you have questions or issues with inviting a vendor contact Accounts Payable ap-staff@uidaho.edu.*

Your supplier will need to exist in Banner. You can search for a supplier by a keyword or click the magnifying glass to open the supplier search dialogue box to browse suppliers in the JAGGAER system.



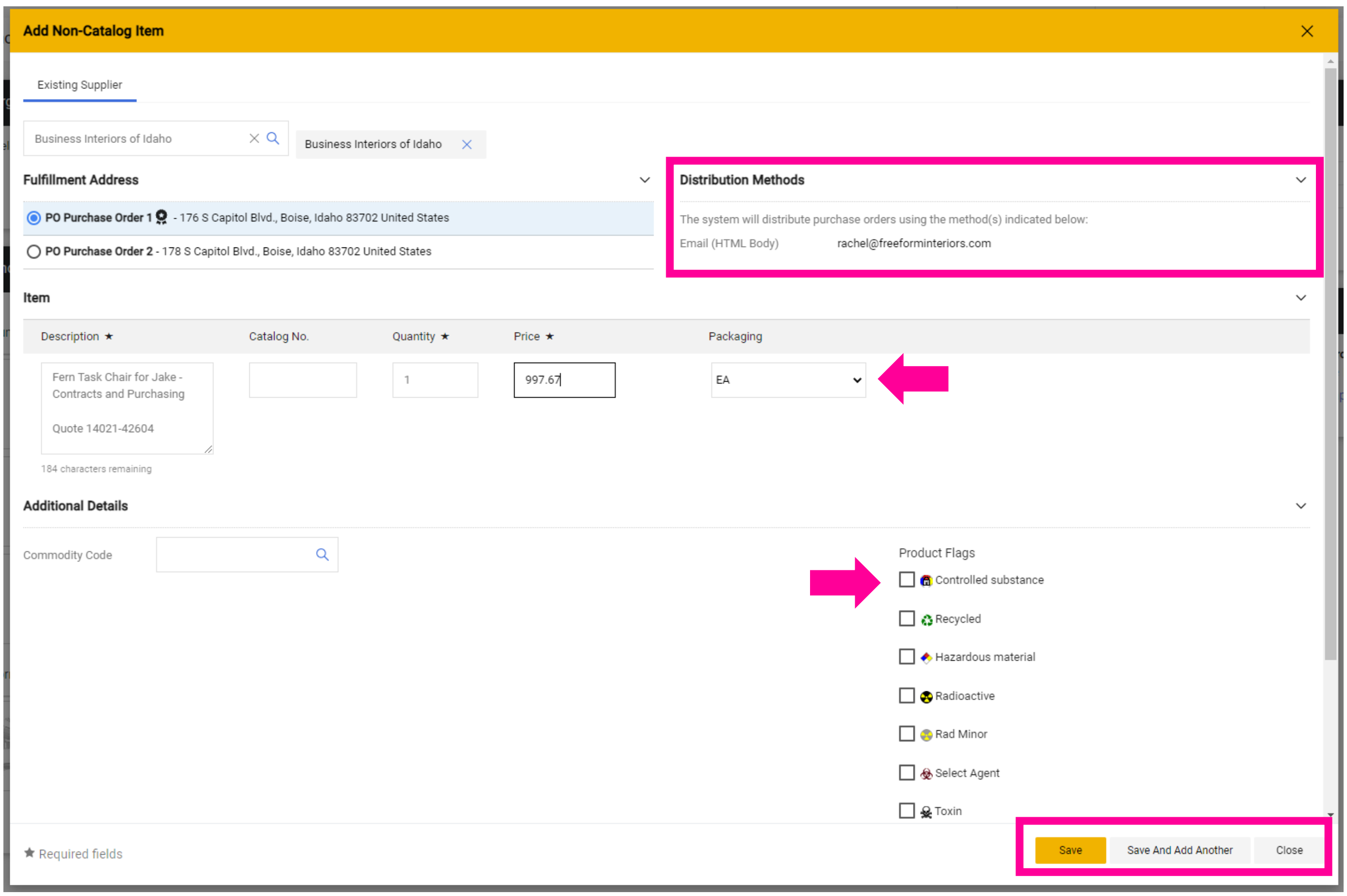
For this example, we will be placing an order to Business Interiors of Idaho (DBA Freeform). All Non-Catalog orders will follow these same steps.

Here you can see that the fulfillment address is selected, and you can see that the distribution method is set to Email – JAGGAER will email the Purchase Order directly to the email address on file once the PO is fully approved. (No more printing of POs!)

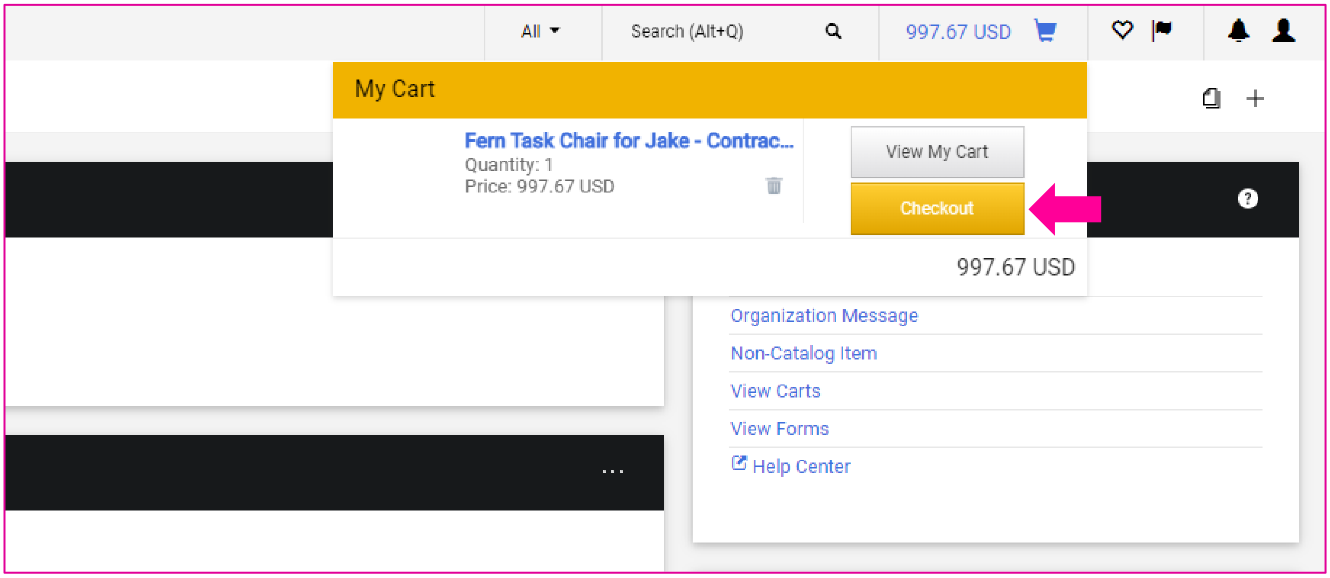
!! IMPORTANT NOTE !! If there is no **Fulfillment (PO) Address**, the **distribution method** is **BLANK,** or there is an **INCORRECT EMAIL** address, please send an email to jaggaer@uidaho.edu with the correct email address for Purchase Orders and the supplier, so we can make the correction. Purchase Orders will not be issued – or will be issued to the wrong email - until this is corrected.

Type the description of the item, along with the quantity and price (adjust the packaging as needed). You may also need to flag your purchase for Environmental Health and Safety (EHS) review.

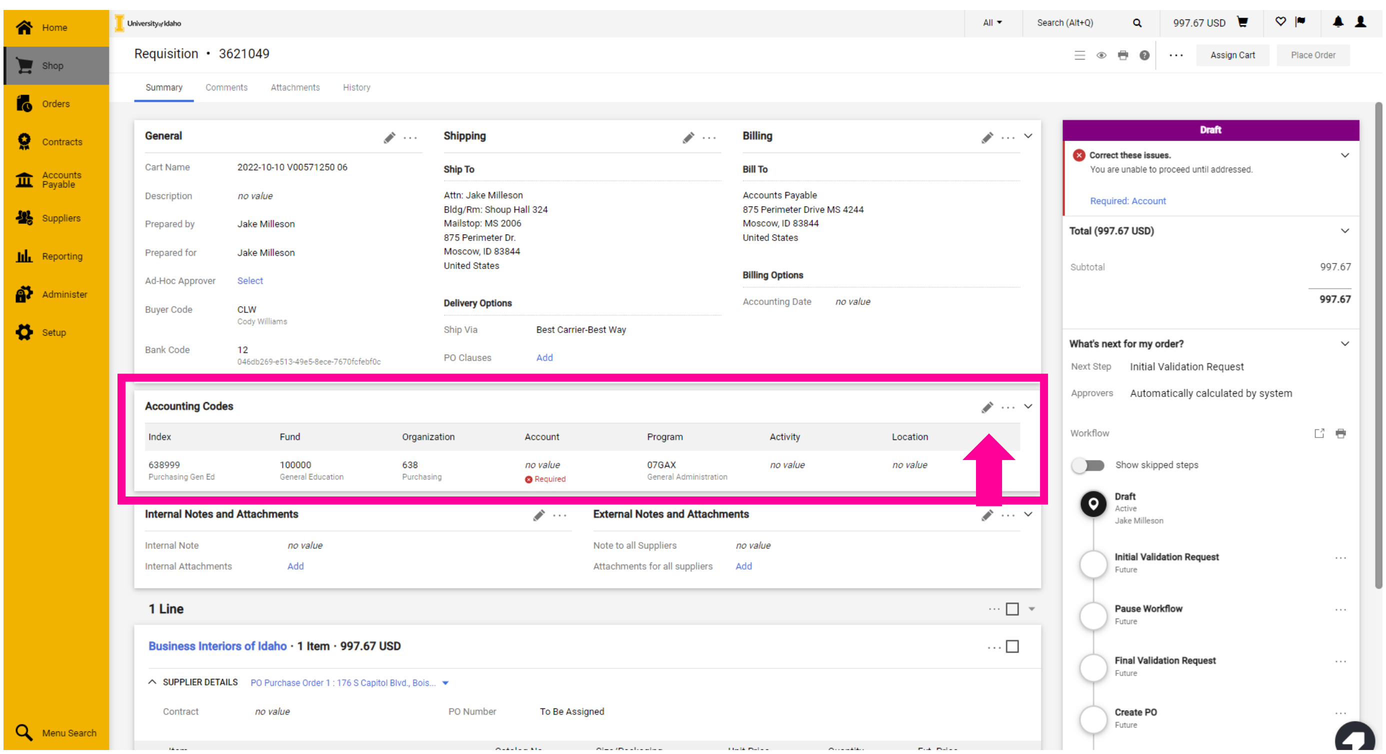
Once you have added your item, you can either save your cart, or add another item from the vendor. For this example, we will only be purchasing one chair, so we will click save.



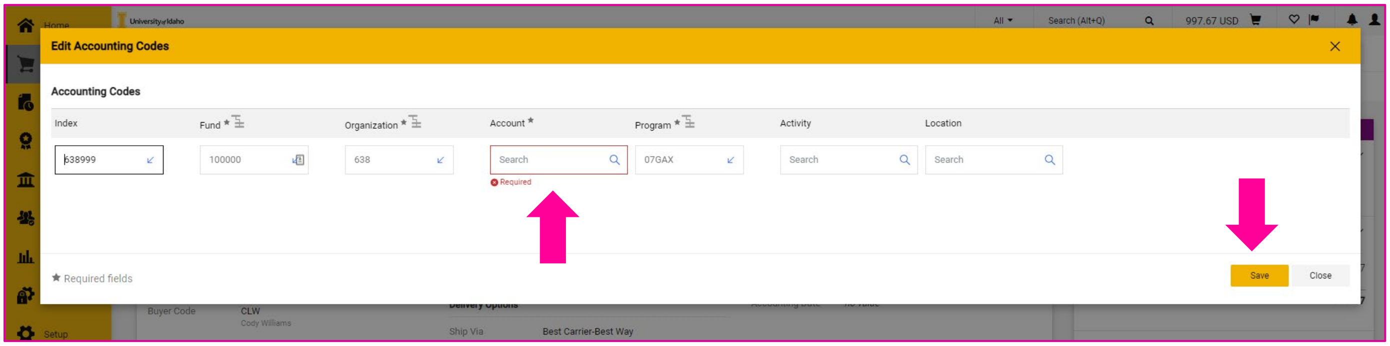
Here we can see that the item has been added to our active JAGGAER cart. We have the option to view or check out. We will select “**Checkout**” for this example.



After proceeding to checkout, you will need to confirm your shipping information and accounting codes. Use the pencil icon to edit your shipping information or accounting codes.



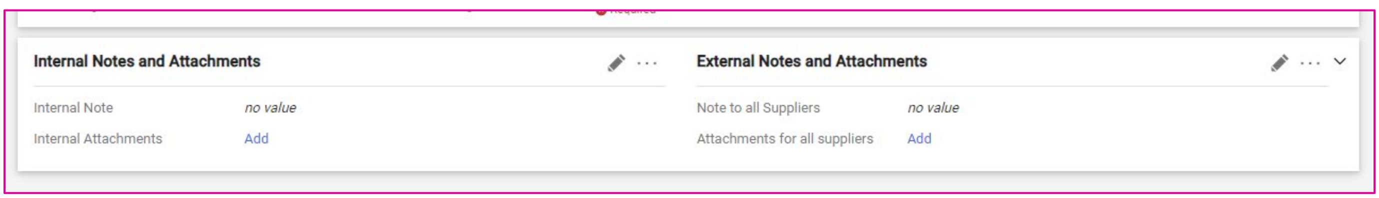
You will need to have at least one accounting line complete before placing the order.



If you have set up ***Default Accounting Codes*** they will populate here. Complete the accounting string by adding the appropriate Account code, and Activity code if desired. If you need to add more than one index or accounting string, see ***Adding multiple Accounting Codes to a JAGGAER transaction.***

Adding Internal or External Notes and Attachments

Depending on the order amount or vendor, supplemental documentation may be required. In JAGGAER there are places to add both internal notes and attachments as well as notes and attachments that will be shared with the vendor (external). These are both found below the accounting codes section.



Internal examples:

- Copies of all quotes
- Bid Waiver
- Supplemental documentation for U of I Records
- Email chains related to procurement

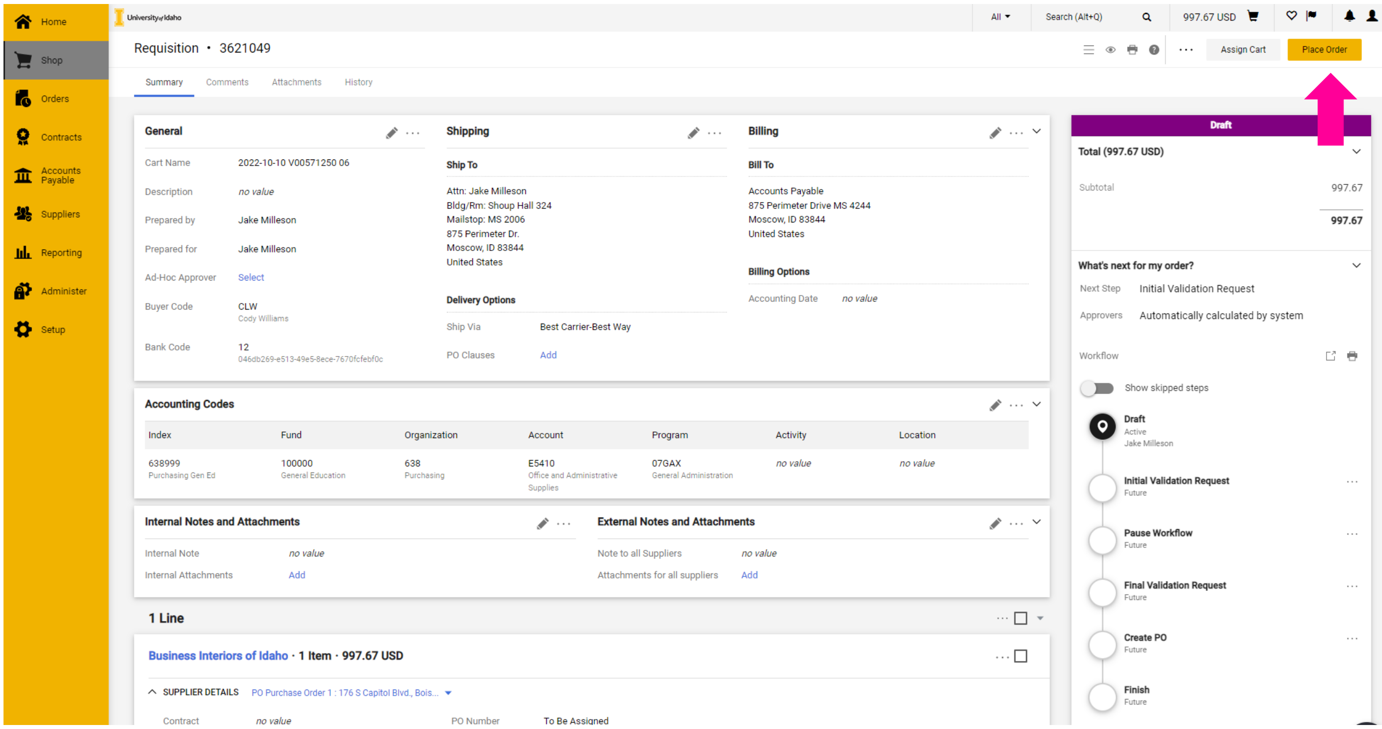
External examples:

- Copy of selected quote
- Other notes and reminders for vendor

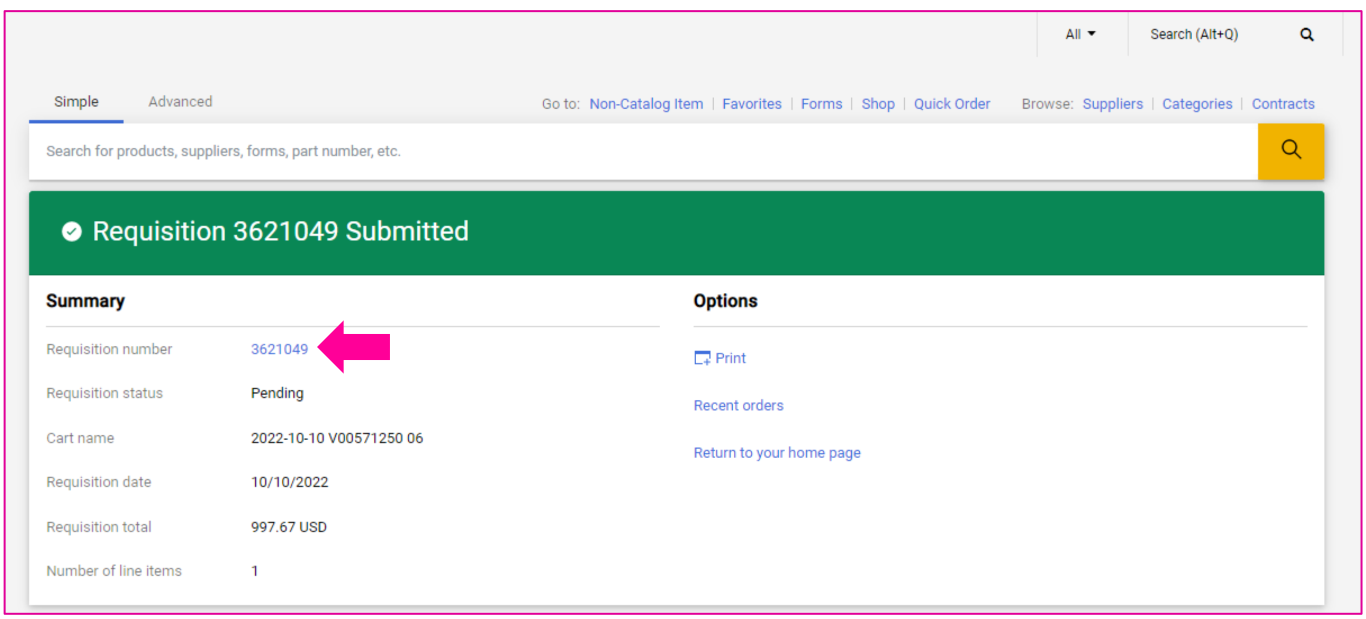
!! IMPORTANT !! *Take care not to share notes or other information that shouldn't be shared with the external supplier by double checking all notes and attachments before sending the PO.*

Once any documentation is added and accounting codes are complete, you can proceed with the requisition by selecting “**Place Order**.” This step will submit the requisition and will validate the accounting codes.

NOTE: *Shoppers will not see the option to place orders and will need to assign their cart to the appropriate Requester for their department.*



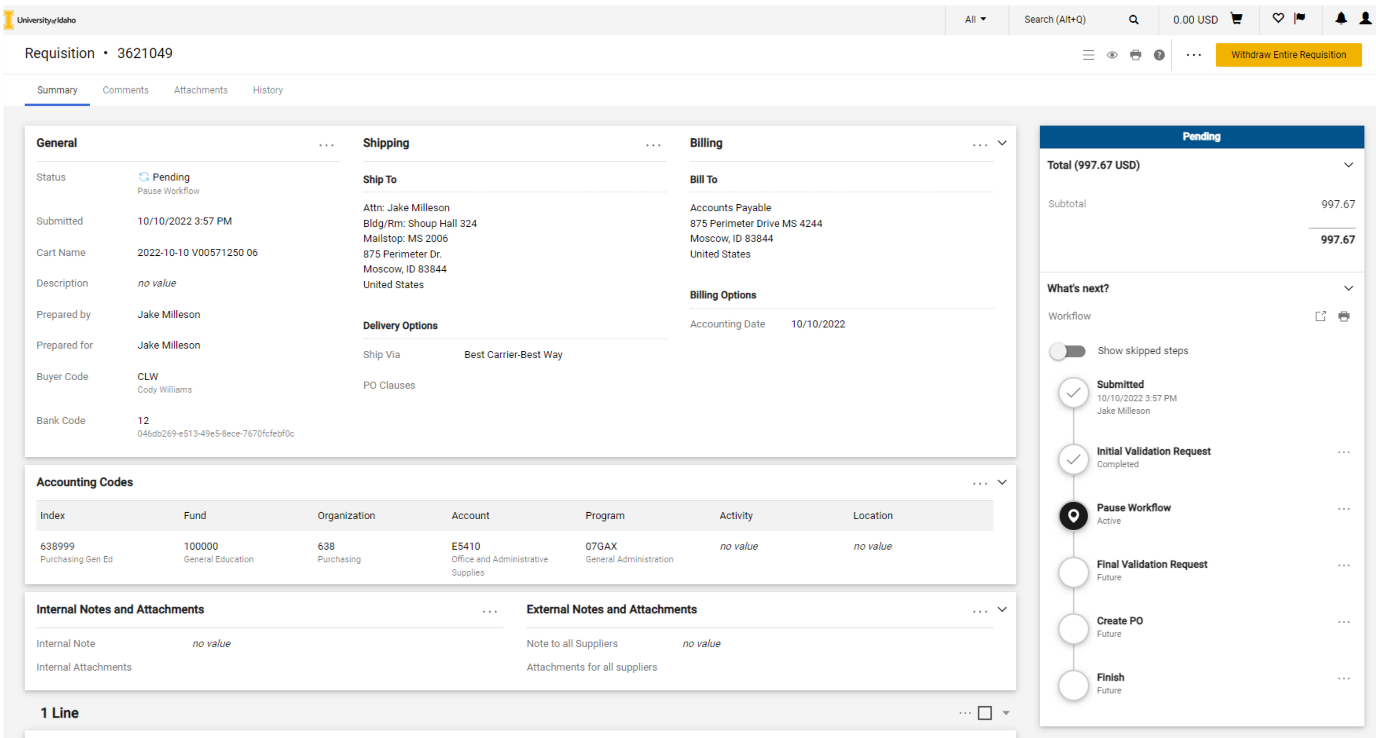
Once the Requisition is submitted, you can click on the requisition number to view the status of the requisition.



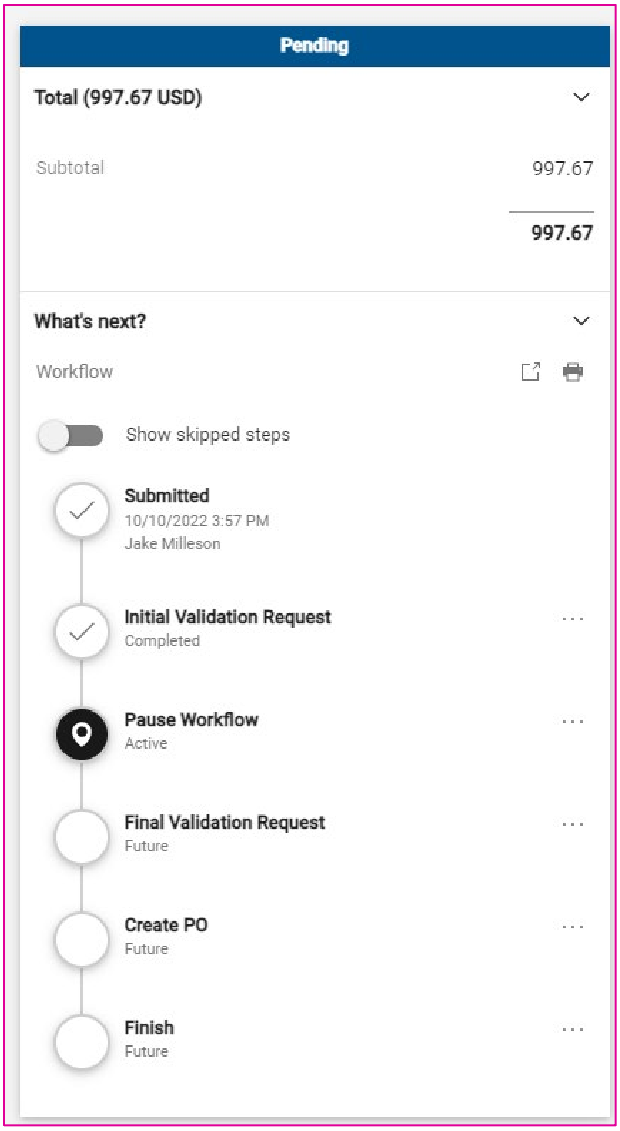
Non-Catalog Requisitions

Once a requisition has been submitted, you can view the status by using the requisition number to find the order.

You can also find recent requisitions by using the global left-hand menu. Go to **Orders** > **My Orders** > **My Requisitions** to see a recent list of orders you own.



In the requisition menu, you will see different steps that the requisition will take. The “Pause Workflow” steps are so that JAGGAER can communicate with Banner. Most of the pause steps are about a minute in length but can take up to five minutes in some scenarios. You can refresh your browser tab to get an update on what stage your requisition is in.



NOTE: *You will see a temporary placeholder PO number while JAGGAER receives a number from Banner. – Banner PO numbers begin with a P and are followed by seven digits. (P0012345 or in this example P0063984).*

(LEFT) Here we can see that the requisition is Pending and is working through its workflow.

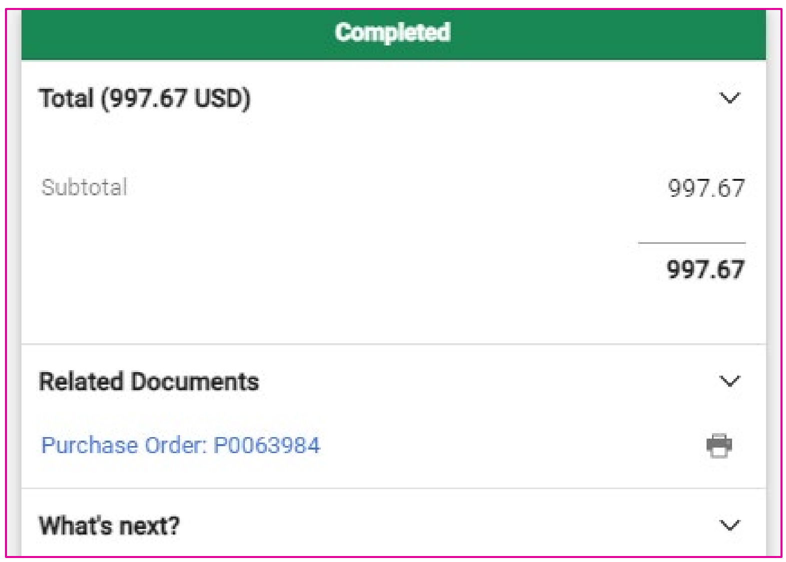
You may see additional steps here such as:

- NSF Review
- Grant Approval
- Special Approval
- Procurement Approval

These steps are determined based on rules in the system. For a list of common rules, see ***General Procurement Rules and Guidelines.***

(BELOW) Once the requisition has been completed, JAGGAER will populate a PO number and the status bar will turn green.

You can access the PO directly from the **Related Documents** section of the status menu by clicking on the number.

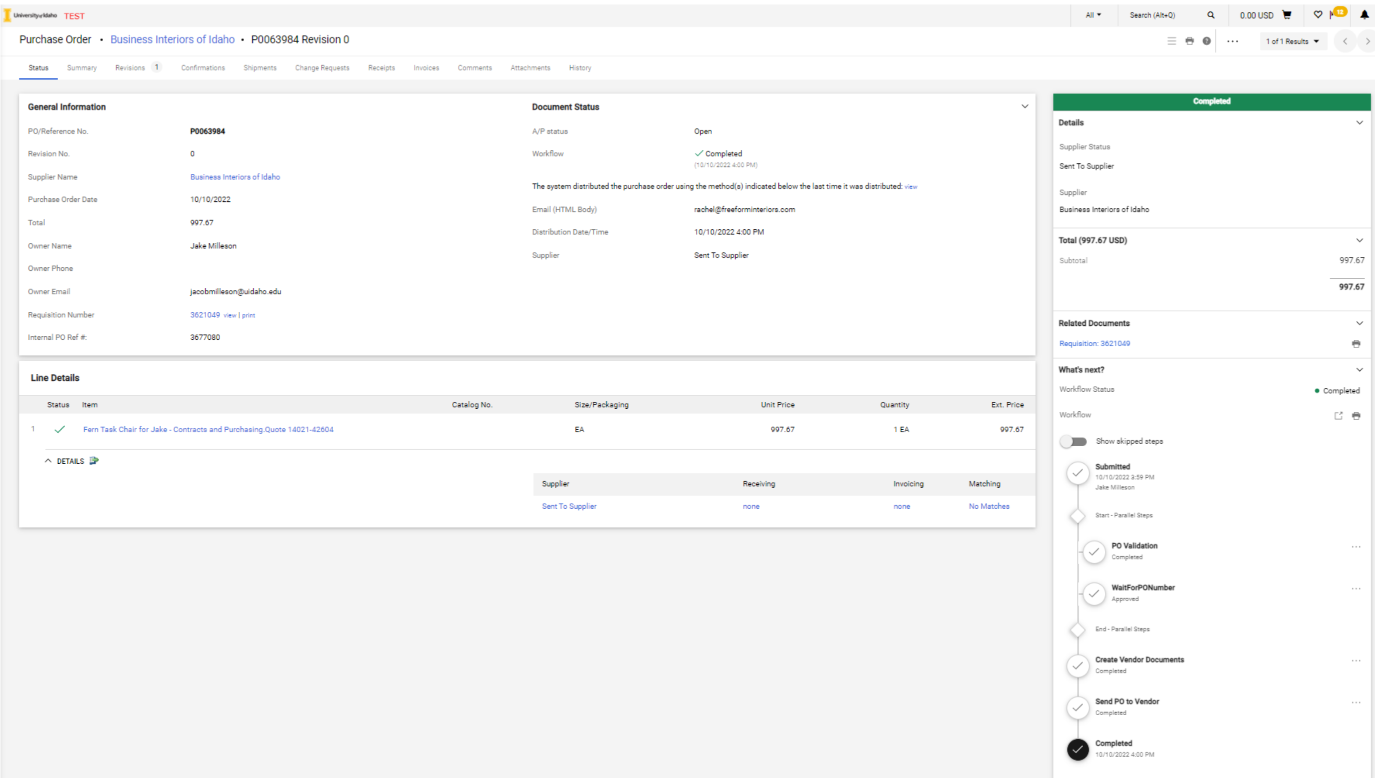


Non-Catalog Purchase Orders

Once a requisition has been completed, you can view the status of the Purchase Order (PO) by using the requisition number to find the order.

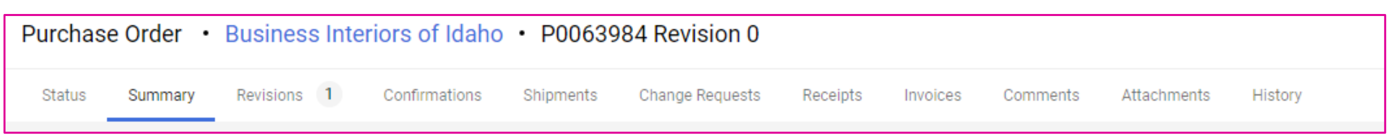
You can also find recent Purchase Orders by using the global left-hand menu. Go to **Orders** > **My Orders** > **My Purchase Orders** to see a recent list of orders you own.

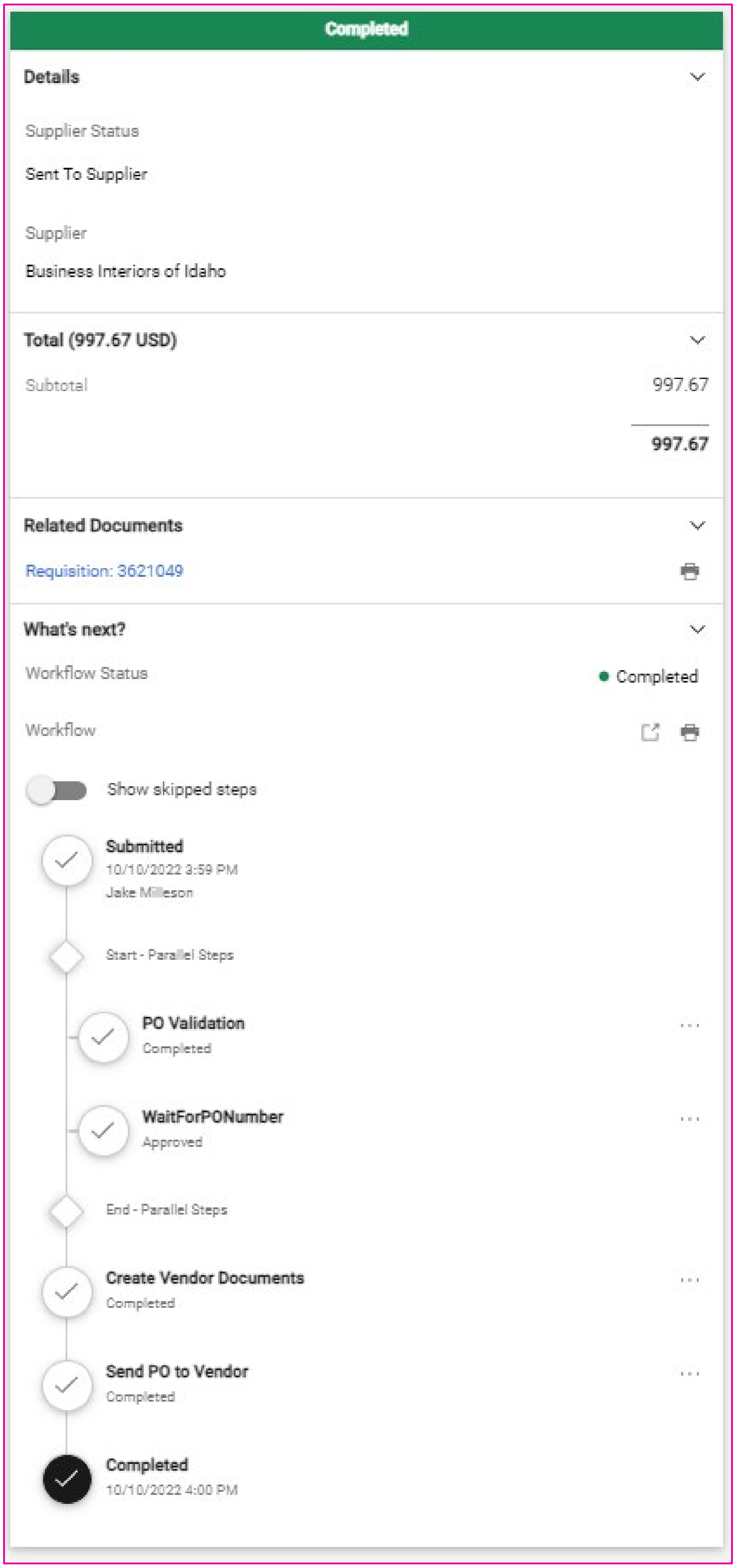
NOTE: *You will see a temporary placeholder PO number while JAGGAER receives a number from Banner. – Banner PO numbers begin with a P and are followed by seven digits. (P0012345 or in this example P0063984).*



On the Purchase Order screen, you will see the status bar to the right with the next steps, much like requisitions. Across the top, you will see a ribbon of options such as Status, Summary, Revisions, etc.

Purchase Order Ribbon example:



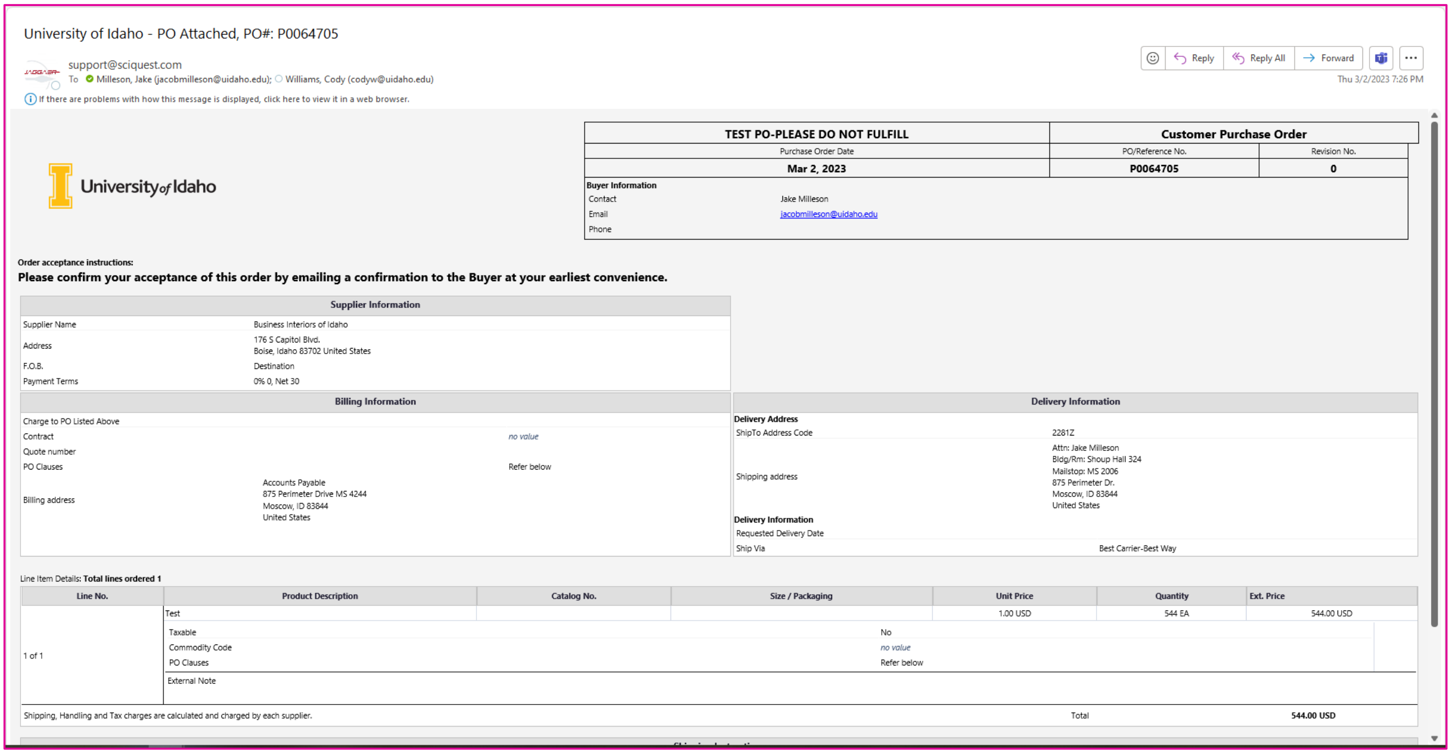


(RIGHT) Here we can see that the Purchase Order to the Non-Catalog vendor has been completed and sent to the vendor.

Non-Catalog vendors will receive a Purchase Order via email as HTML body, an email attachment, or both.

Example Vendor PO

Below is an example of what a vendor will receive from the system. *Note POs come from the email address support@sciquest.com.*



University of Idaho - PO Attached, PO#: P0064705

support@sciquest.com
To Milleson, Jake (jacobmilleson@uidaho.edu); Williams, Cody (codyw@uidaho.edu)

If there are problems with how this message is displayed, click here to view it in a web browser.

Reply | Reply All | Forward

Thu 3/2/2023 7:26 PM

University of Idaho

TEST PO-PLEASE DO NOT FULFILL	Customer Purchase Order	
Purchase Order Date	PO/Reference No.	Revision No.
Mar 2, 2023	**P0064705**	**0**

Buyer Information

Contact	Jake Milleson
Email	jacobmilleson@uidaho.edu
Phone	

Order acceptance instructions:

Please confirm your acceptance of this order by emailing a confirmation to the Buyer at your earliest convenience.

Supplier Information	
Supplier Name	Business Interiors of Idaho
Address	176 S Capitol Blvd. Boise, Idaho 83702 United States
F.O.B.	Destination
Payment Terms	0% 0, Net 30

Billing Information		
Charge to PO Listed Above		
Contract		*no value*
Quote number		
PO Clauses		Refer below
Billing address	Accounts Payable 875 Perimeter Drive MS 4244 Moscow, ID 83844 United States	

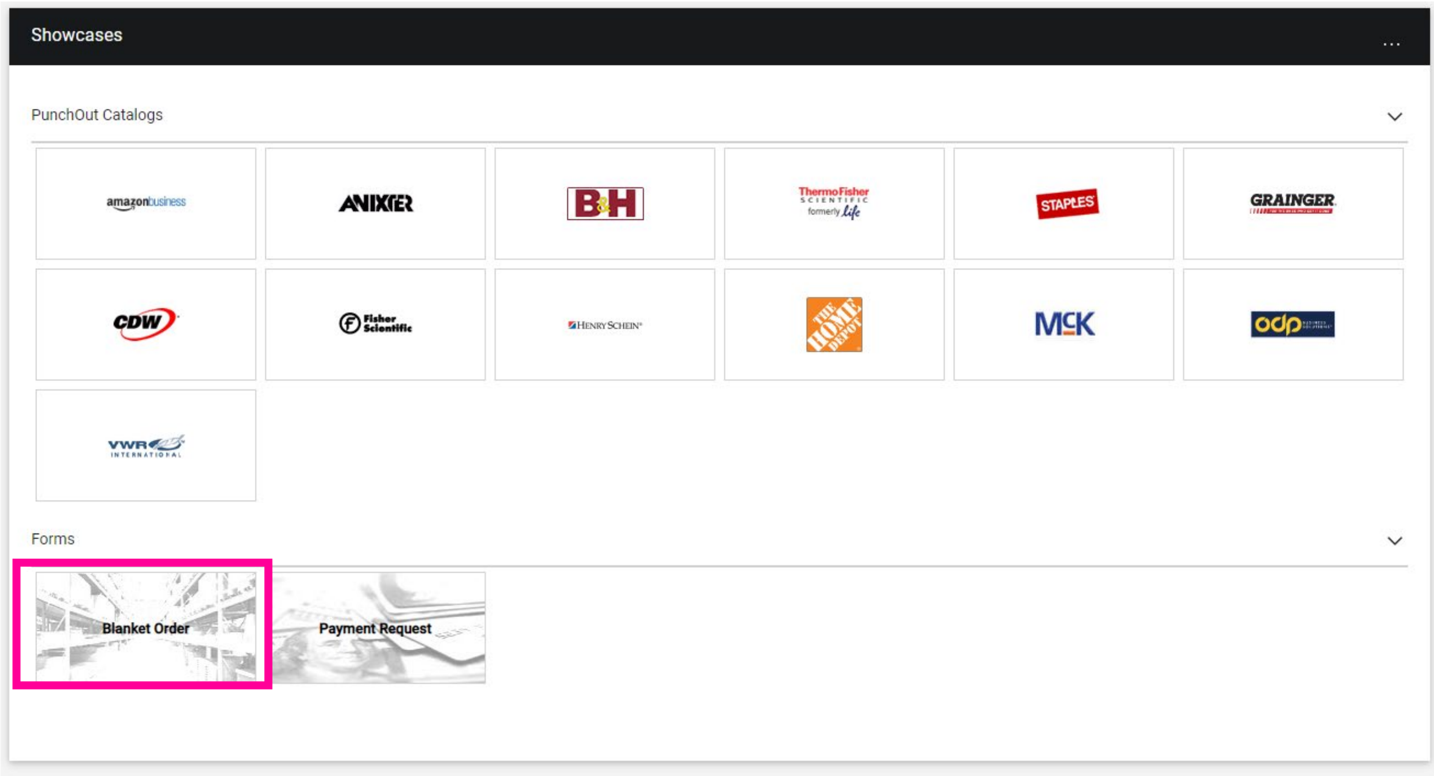
Delivery Information	
Delivery Address	
ShipTo Address Code	2281Z
Shipping address	Attn: Jake Milleson Bldg/Rm: Shoup Hall 324 Mailstop: MS 2006 875 Perimeter Dr. Moscow, ID 83844 United States
Delivery Information	
Requested Delivery Date	
Ship Via	Best Carrier-Best Way

Line Item Details: **Total lines ordered 1**

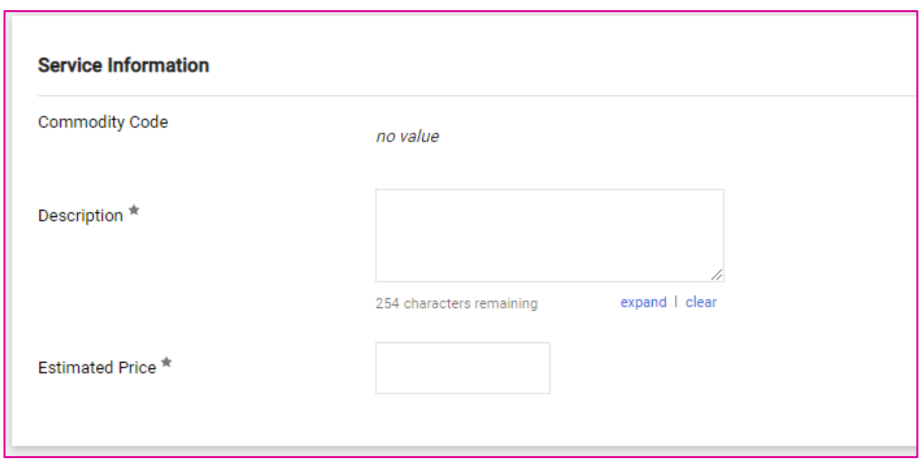
Line No.	Product Description	Catalog No.	Size / Packaging	Unit Price	Quantity	Ext. Price
1 of 1	Test			1.00 USD	544 EA	544.00 USD
	Taxable		No			
	Commodity Code		*no value*			
	PO Clauses		Refer below			
	External Note					
Shipping, Handling and Tax charges are calculated and charged by each supplier.				Total		**544.00 USD**

Blanket Order Form

From the Shopping Dashboard, select the **Blanket Order** button.



A Blanket Order form looks similar to the Non-Catalog Item form. Your vendor will need to be an active vendor in Banner before the Blanket Purchase Order can be created.



Enter the description (what will show as the line item) Please include Fiscal Year/dates valid and account information.

Enter the estimated price for your Blanket Order. The estimated price is what will be encumbered and what invoices will be charged against throughout the entire fiscal year.

!! IMPORTANT !! When creating Blanket POs for your water or copier service please be sure to include your account number and/or machine number.

Section 3: Contracts+

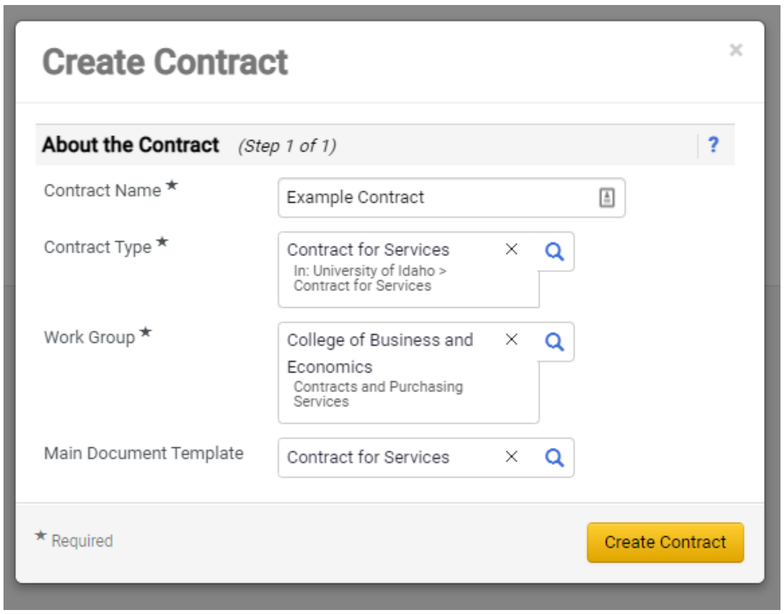
University of Idaho

Creating a Contract for Services

Designated users with the **Contract Manager** role can create contracts directly from the left-hand global menu by going to **Contracts** > **Contracts** > **Create New Contract ...**

Creating a Contract

Designated users with the **Contract Manager** role can create contracts directly from the left-hand global menu by going to **Contracts** > **Contracts** > **Create New Contract ...**



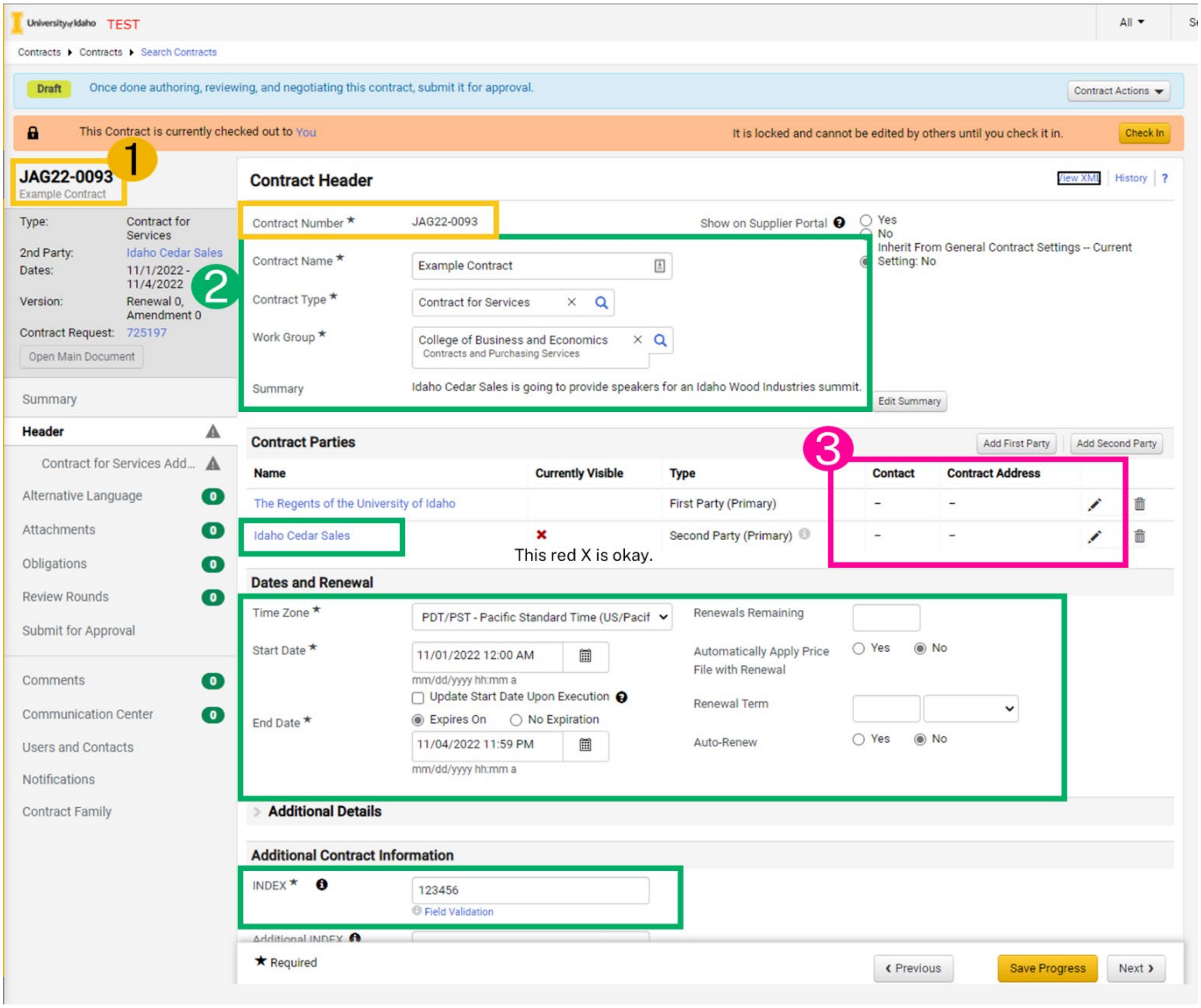
(LEFT) In the Create Contract dialogue box, you can give a contract a name – this will help you find the contract later.

In this example we will create a Contract for Services for the College of Business and Economics.

The main document template will be the Contract for Services.

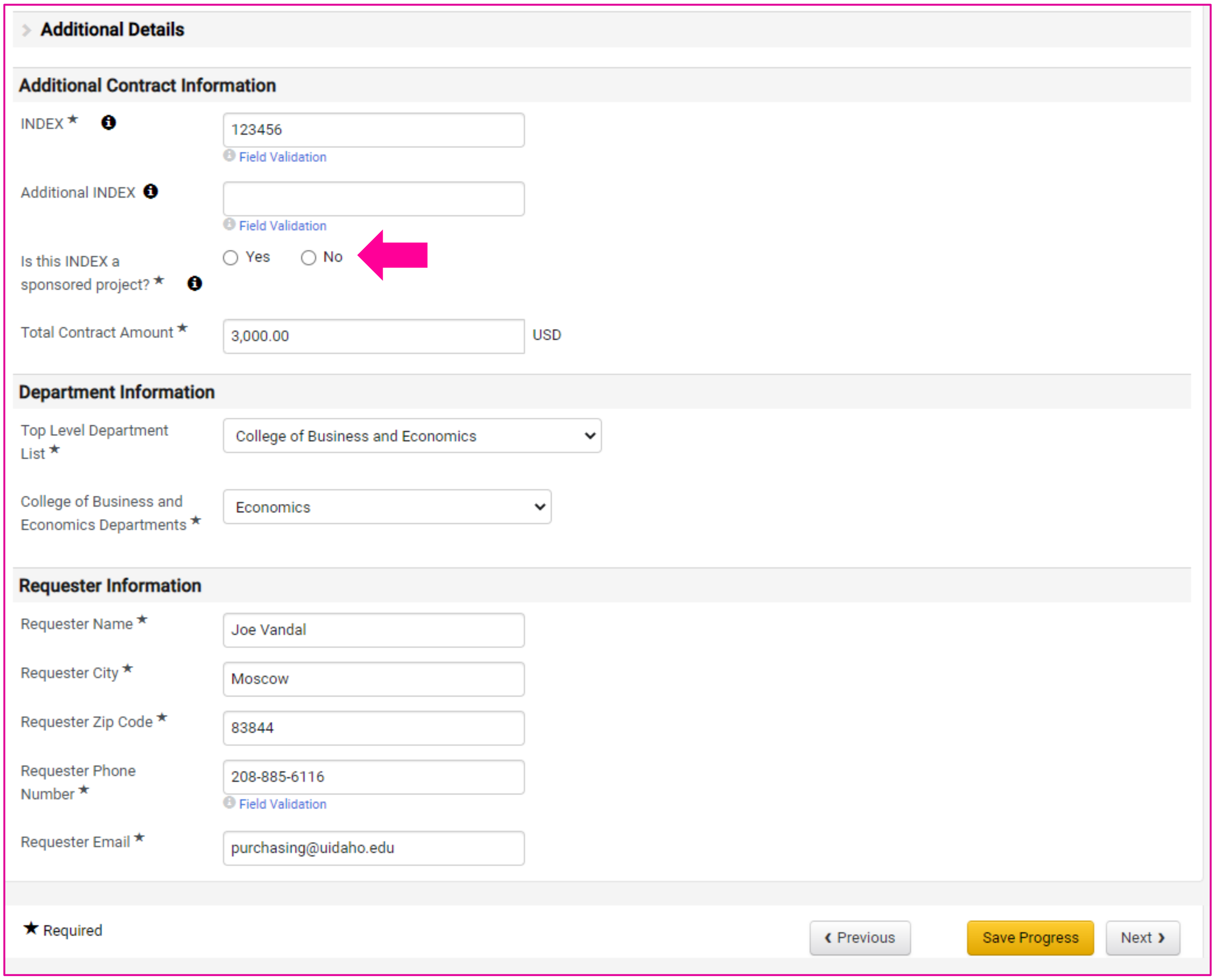
Contract Headers

Once you select "Create Contract," your request will flip into the "**Contract Header**." The Contract header includes key information about the contract and this information should be carefully reviewed for accuracy.



1. Note that the Contract now has a number. In this example it is JAG22-0093.
2. The Contract Manager/Approver will need to add contact information for U of I and the Second Party using the pencil icon at this stage of the contract creation process.

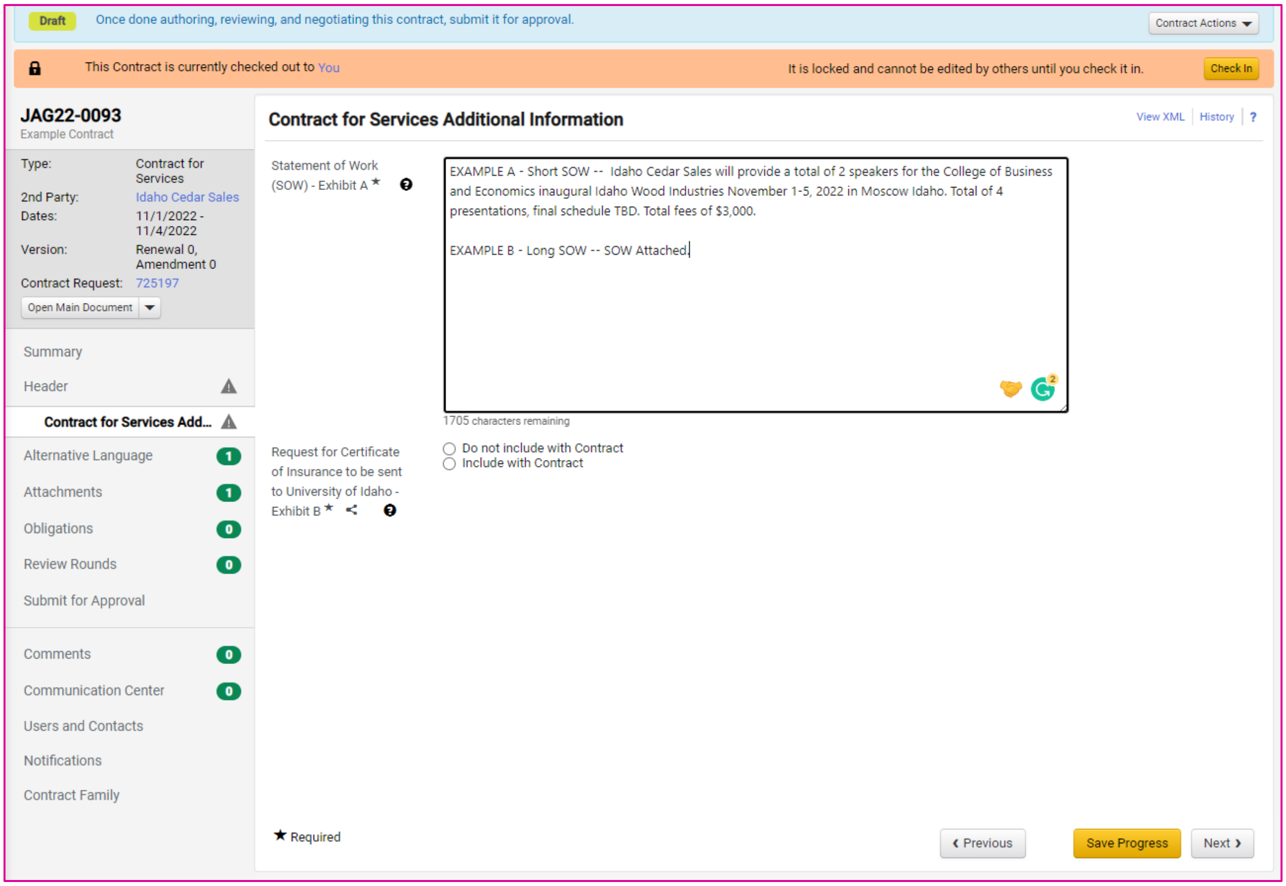
Additional details are needed to ensure that the contract is routed to the appropriate departments for review and the information is correct.



*Selecting "**YES**" to the question "Is this INDEX a sponsored project?" routes the contract for review by the Office of Sponsored Programs and should be selected if connected to a Grant or other project overseen by OSP.*

Contract for Services Additional Information

The next screen when creating a Contract for Services agreement will be for additional information required to create the contract.



Statement of Work – Exhibit A

Each contract for services requires a statement of work. If you have a simple/short statement of work, you can type your statement of work out; or you can simply attach a statement of work under the **Attachments** section found in the left-hand contract navigation bar.

Request for Certificate of Insurance – Exhibit B

Many types of contracted services need to have the University of Idaho listed as a certificate holder for the duration of the contract. Selecting "Do not include with Contract." Will not add an Exhibit B for which types of insurance is required by the university. Selecting "Include with Contract" will add the exhibit into the contract language.

Contact Risk Management (risk@uidaho.edu) for guidance on if your contract will need a Certificate of Insurance or see the ***Service Agreement Matrix*** for guidance on common contract types and insurance requirements.

Alternative Language

This screen should only be used by Contracts and Purchasing Services. Select “**Next >**.”

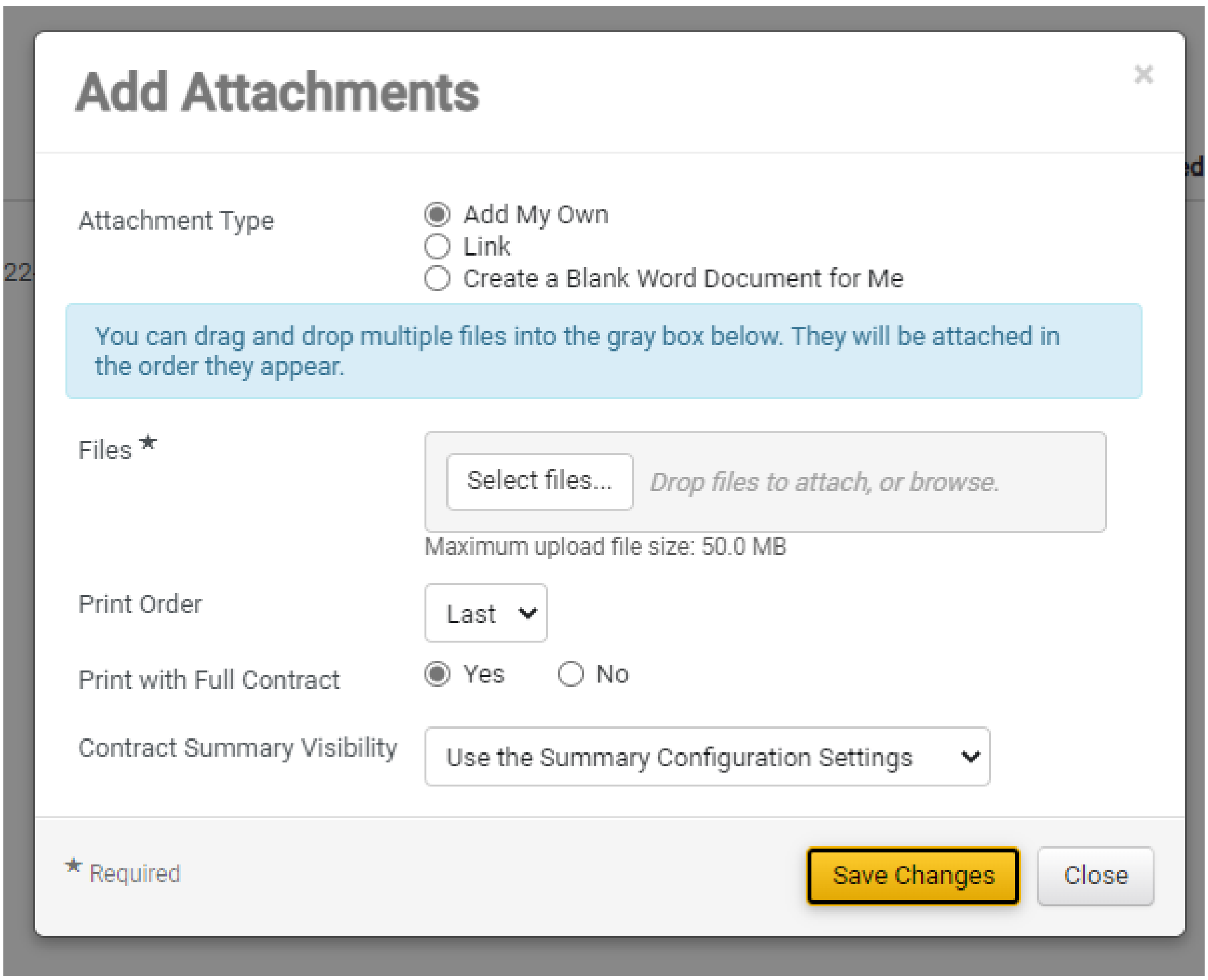
Attachments

Here you will see the documents associated with the Contract for Services. There are several options in the dialogue box to change the visibility of documents uploaded and whether to include the attachment with the full contract.

- Main Document – Is the master agreement.

Common uploads:

- Statement/Scope of Work (SOW)
- Insurance Certificate
- (Internal) – Email communications for internal records



Obligations (Optional)

On the Obligations page, the Contract Manager or Contract Administrator can add obligations to the contract, edit or cancel obligations, and mark obligations complete.

The Obligations page provides two different views. Show Recurring Obligations As...
1) Series or 2) Occurrences.
The Series view is the default option for contracts in a status of:

- Draft
- Internal Review
- External Review

Once contracts move to a status beyond Draft:

- Executed: In Effect
- Executed: Future
- Complete
- Expired
- Terminated
- Out for Signature
- Pending Approval
- Pending Signature
- Superseded

The default view is the Occurrences option. What differs between the Series view and the Occurrences view is the way they display recurring obligations. The Series view shows the series definition, while the Occurrences view shows each series expanded into all its individual occurrences. One Time obligations appear the same on both views.

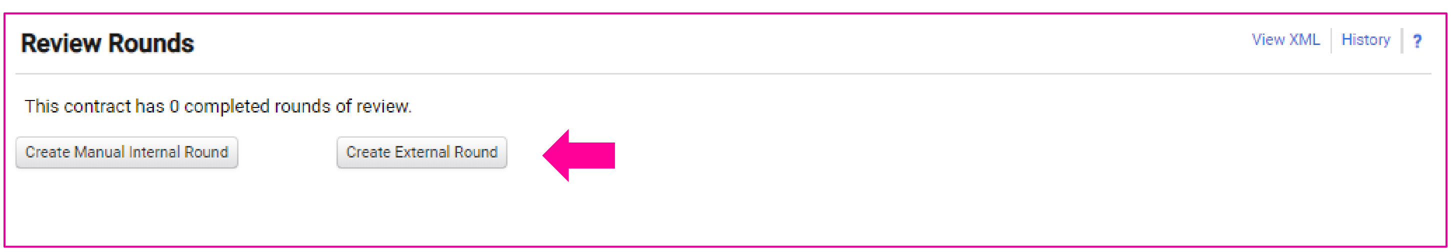
Also, Search and Filter is available only on the Occurrences view. And the option to mark an obligation complete is only available on the Occurrences view.

See the Obligations page help box in JAGGAER for more information.

Review Rounds (Optional)

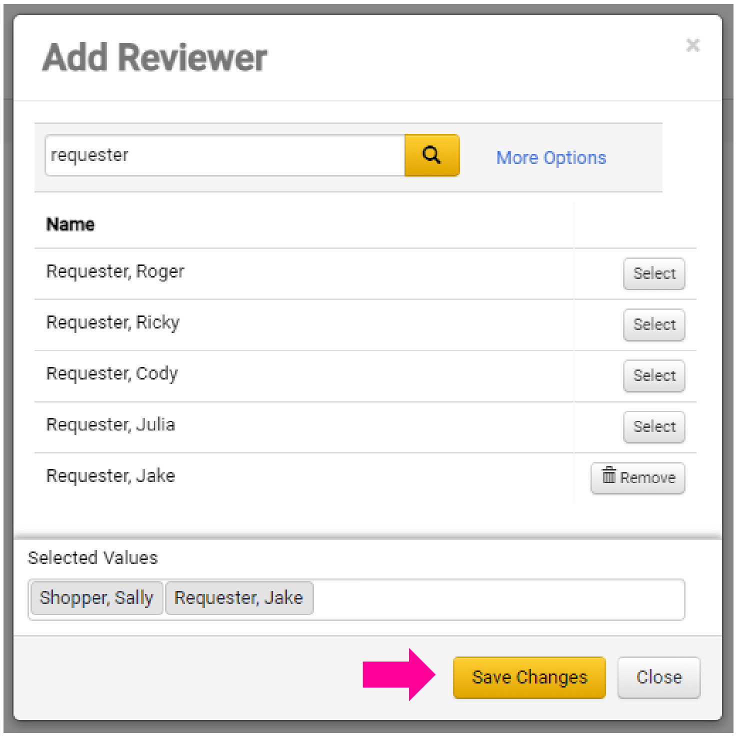
Review rounds can be utilized to receive additional approvals from contract stakeholders before submitting the contract into the pre-defined workflow. These workflows can be either internal, external, or both.

To begin a Review Round, select whether you are creating an Internal or External round.

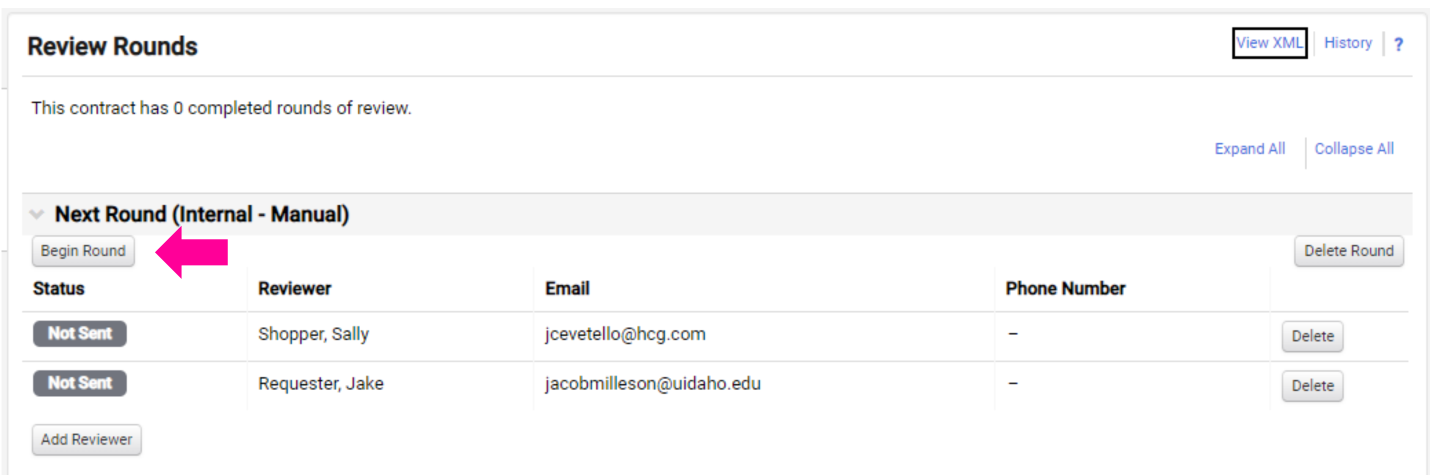


Internal Review Rounds

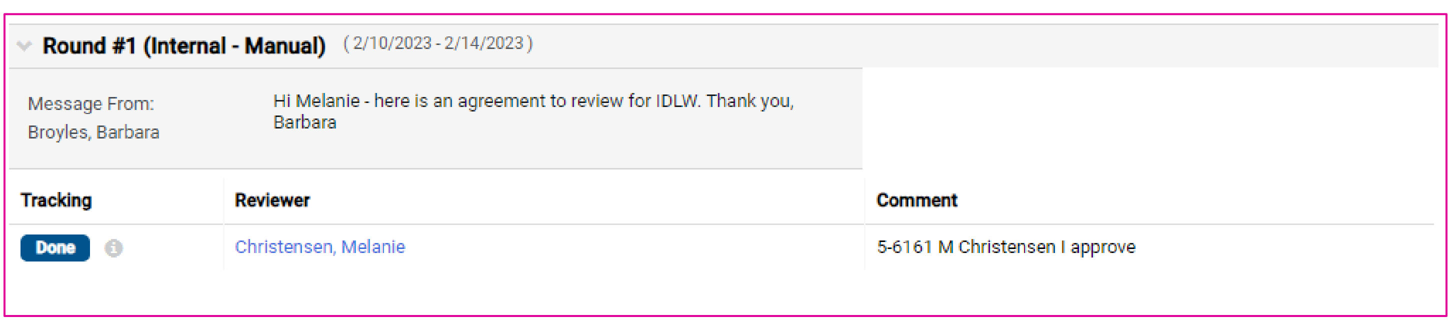
Add reviewer(s) by searching by name from the dialogue box. Once you have selected your reviewer(s). Click **Save Changes**.



When you are ready to begin your review rounds, select "**Begin Round**"

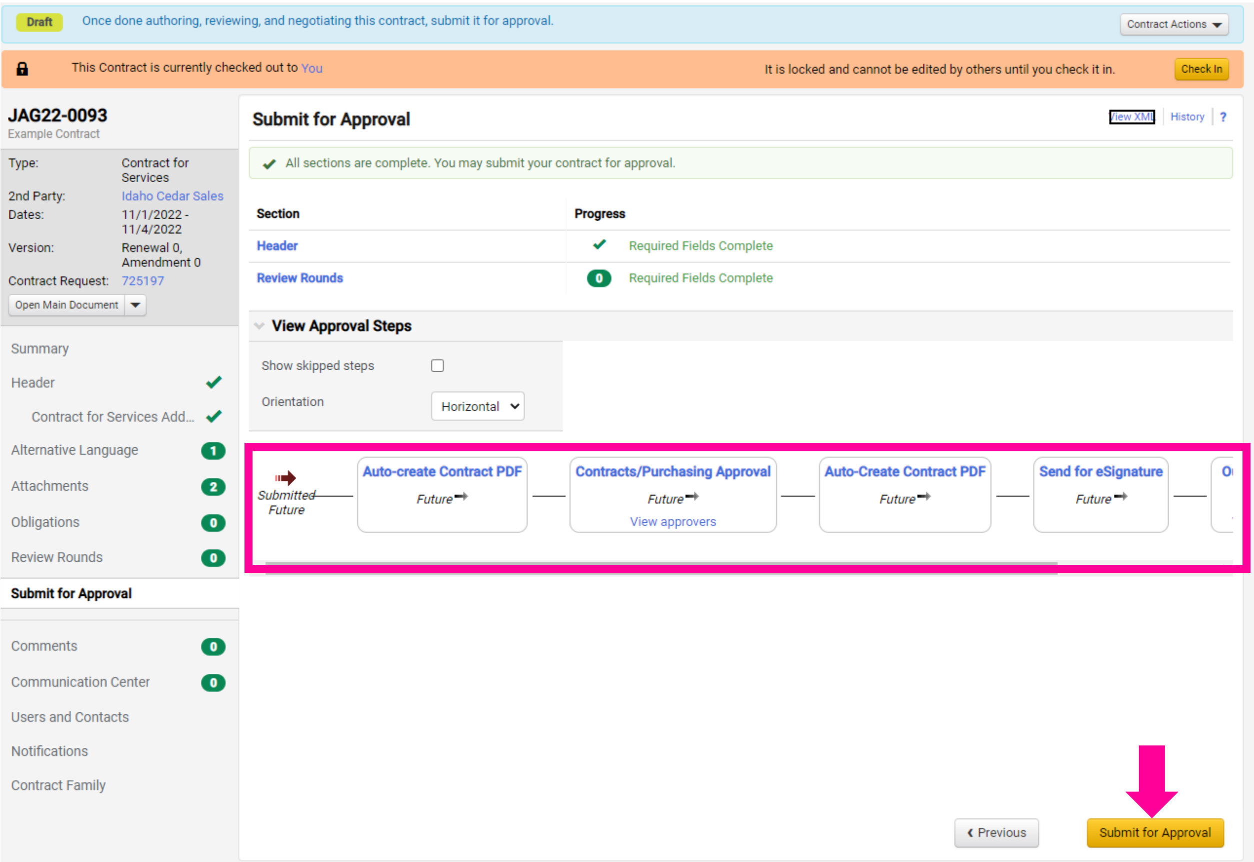


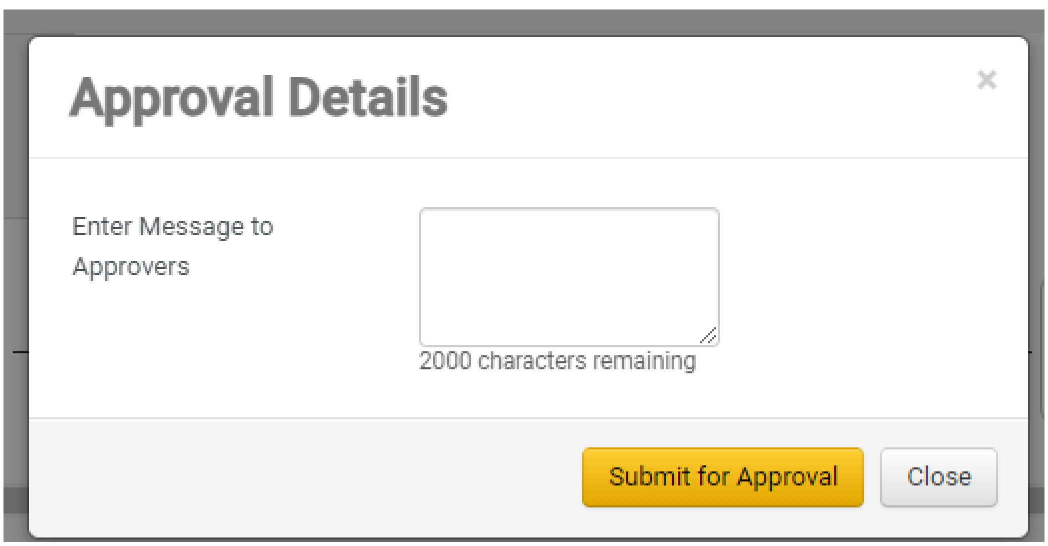
Once Review Rounds are complete you can submit the contract into the standard approval workflow, or make changes.



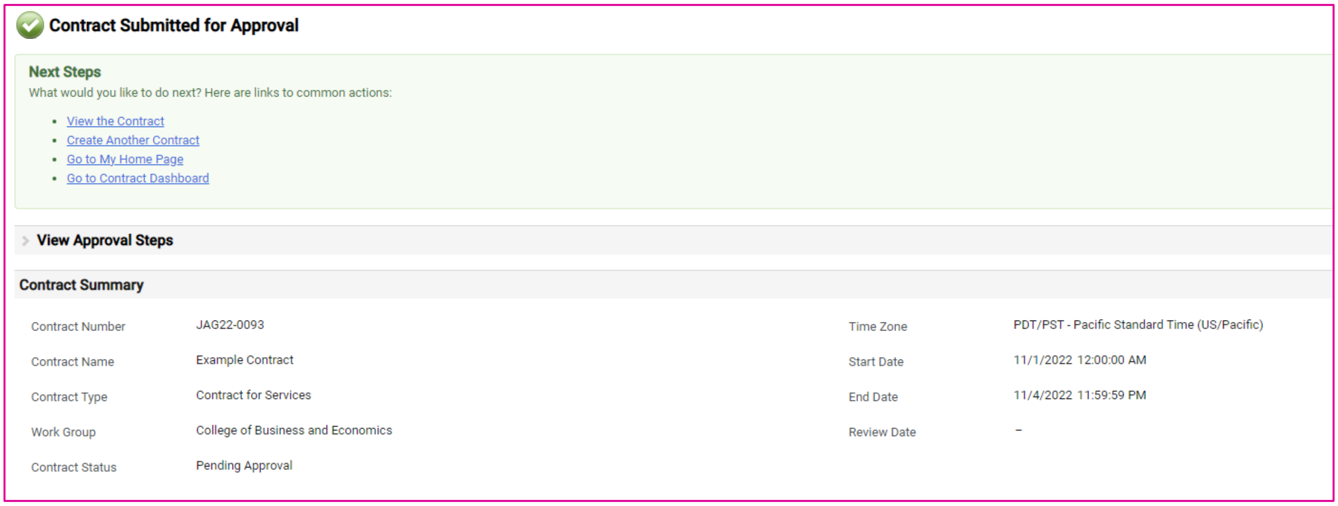
Submitting a Contract for Services for Approval

Once all required fields are satisfied, you can submit the contract into the approval process. The Submit for Approval screen will allow you to preview the steps that your contract will take. This screen will allow you to track the status of your contract at any time.





Once your contract is submitted for approval you will see a success screen:



Contract for Services Approvals

Once a contract for services is successfully submitted, the contract will route for approval. Depending on what level of permissions the user had that created the contract, the options selected during the contract creation process (see ***Contract Headers***), and the workgroup selected the contract will be routed to various approvals.

See next page for a table of ***Contract workflow steps and approvals.***

Contract workflow steps and approvals

Step	Description	Skipped if…
Auto-Create Contract PDF	Automatically takes Contract Header information and fills in the Contract for Services template. Converts document into a PDF file.	Never – Automatic approval step.
Department Approval	Routes to workgroup Contract Approver for approval.	Created by Contract Admin for workgroup.
OSP Approval	Triggers review for compliance from the Office of Sponsored Programs.	Is this INDEX a sponsored project? Equal to "No."
Contracts/Purchasing Approval	For approval/review by Contracts and Purchasing staff before sending to the 2nd party.	Never – Automatic approval step. All contracts should be reviewed/Approved by CPS.
Auto-Create Contract PDF	Automatically takes Contract Header information and fills in the Contract for Services template. Converts document into a PDF file.	Never – Automatic approval step.
Send for eSignature	University of Idaho is not using eSignature currently. The rule will auto-approve.	Never – Automatic approval step.
Out for Signature	**Contract Manager/Requester** in department will send to 2nd Party contact for signature.	Never – **‼ MANUAL STEP ‼**
Contract Countersignature	**Contract Manager/Requester** or 2nd Party to return contract to purchasing@udiaho.edu for execution.	Never – **‼ MANUAL STEP ‼**
Contract Execution	**CPS** will countersign and upload a fully executed copy into JAGGAER. Dept. to send copy to vendor.	Never – **‼ MANUAL STEP ‼**

Facility Use Agreement

The Facility Use Agreement template is used by a select number of individuals/departments on campus. *Note this is for the rental of U of I-owned spaces to a second party rather than another parties agreement to rent space.*

Designated users with the **Contract Manager** or **Contract Approver** roles can create contracts directly from the left-hand global menu by going to **Contracts** > **Contracts** > **Create New Contract ...** and selecting "**Facility Use Agreement"** as the contract type.

Departments that commonly use this agreement:

- Administrative and Business Operations
- McCall Outdoor Science School (MOSS)/ McCall Field Campus
- Sandpoint Organic Agriculture Center (SOAC)

For more information on this template/training, please email purchasing@uidaho.edu.

Other Parties Agreement

The "Other Parties Agreement" option is used for all other contracts. And will allow you to upload the contract instead of form-filling a template. A sub-option is available for Hotel Agreements – see ***Hotel Agreements***.

Other Parties Agreement Contract Request

The steps to create a request for a contract using the other parties agreement is very similar to that for requesting a contract for services. See the section ***Creating a Contract for Services from a Request.***

To request a contract, begin by selecting the **Contracts+** module from the global left-hand navigation menu. **Contracts** > **Requests** > **Request Contract**.

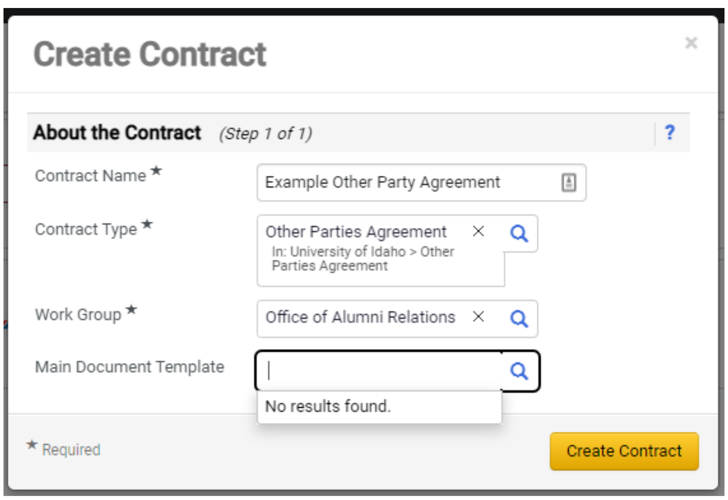
Key differences:

- Attach the Other Parties Agreement in the Attachments stage of the request.

Creating an Other Parties Agreement Contract

Designated users with the **Contract Manager** or **Contract Approver** roles can create contracts directly from the left-hand global menu by going to **Contracts** > **Contracts** > **Create New Contract ...**

Select the "**Request Actions**" button on the right side of the blue bar and then "**Create Contract**" to open the Create Contract dialogue box.



(LEFT) In the Create Contract dialogue box, you can edit the contract name (if needed, as this is used in emails to the vendor) and confirm the contract types and work group.

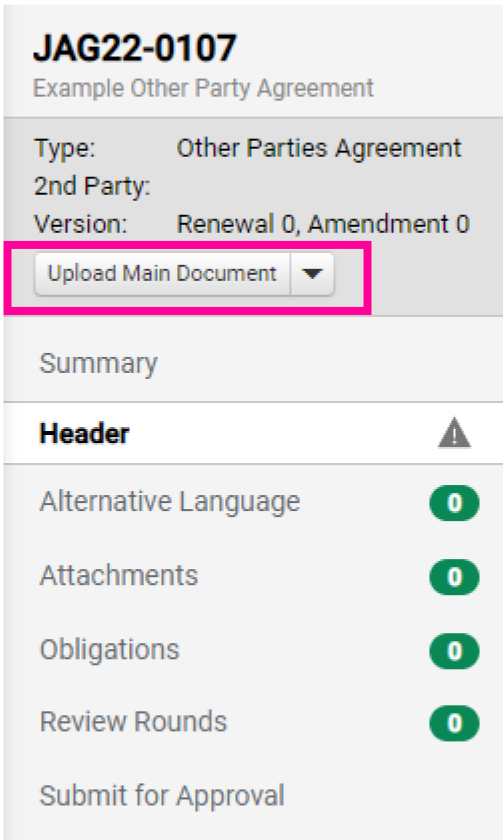
In this example we will create a contract not using a predetermined template.

The main document template will be left blank as we will be using a contract from another party.

Other Parties Agreement – Contract Header & Creation

The Contract Header and other information is very similar to the process outlined in the section ***Contract Headers.***

Designated users with the **Contract Manager** or **Contract Approver** roles can create contracts directly from the left-hand global menu by going to **Contracts** > **Contracts** > **Create New Contract …** and selecting "**Other Parties Agreement"** as the contract type.



Key Differences:

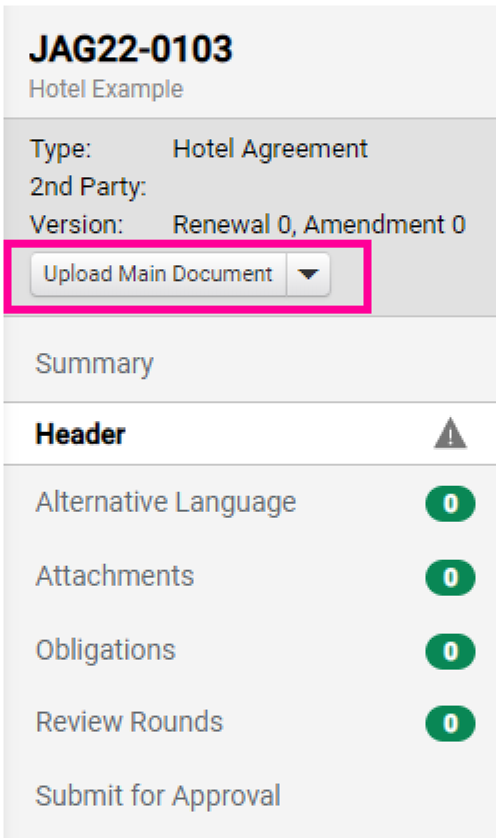
- The Main Document will need to be uploaded using the button on the left – or during the attachment stage. **(LEFT)**
- There are no options for Alternative Language. Certificates of Insurance should be requested and uploaded under the "**Attachments**" section. See ***Certificates of Insurance*** for details.

Hotel Agreements

The Hotel Agreement template has been set up to help expedite the process for group reservation agreements. To create a hotel agreement contract, select the **Hotel Agreement** as the contract type and upload the other party's agreement.

Designated users with the **Contract Manager** or **Contract Approver** roles can create contracts directly from the left-hand global menu by going to **Contracts** > **Contracts** > **Create New Contract ...** and selecting "**Hotel Agreement"** as the contract type.

Hotel Agreement Contract Header



(LEFT) Upload the hotel agreement using the "**Upload Main Document"** button in the left-hand contract menu.

If your hotel has not been added as a vendor in Banner:
For the second party is not set up in Banner as a vendor, please select the "**Hotel Vendor**" as your primary second party. This will circumvent the requirement to register as a vendor the hotel in advance of the contract. If you plan to pay the hotel using the ***Payment Request Form (Direct Pay***) i.e. expected payment > $5,000 and planned to pay with a Pcard), they will need to register via **PaymentWorks** in the meantime.

If your hotel is a vendor in Banner:

Select your second party vendor as normal and proceed with the rest of the contract header details and **Submit for Approval**.

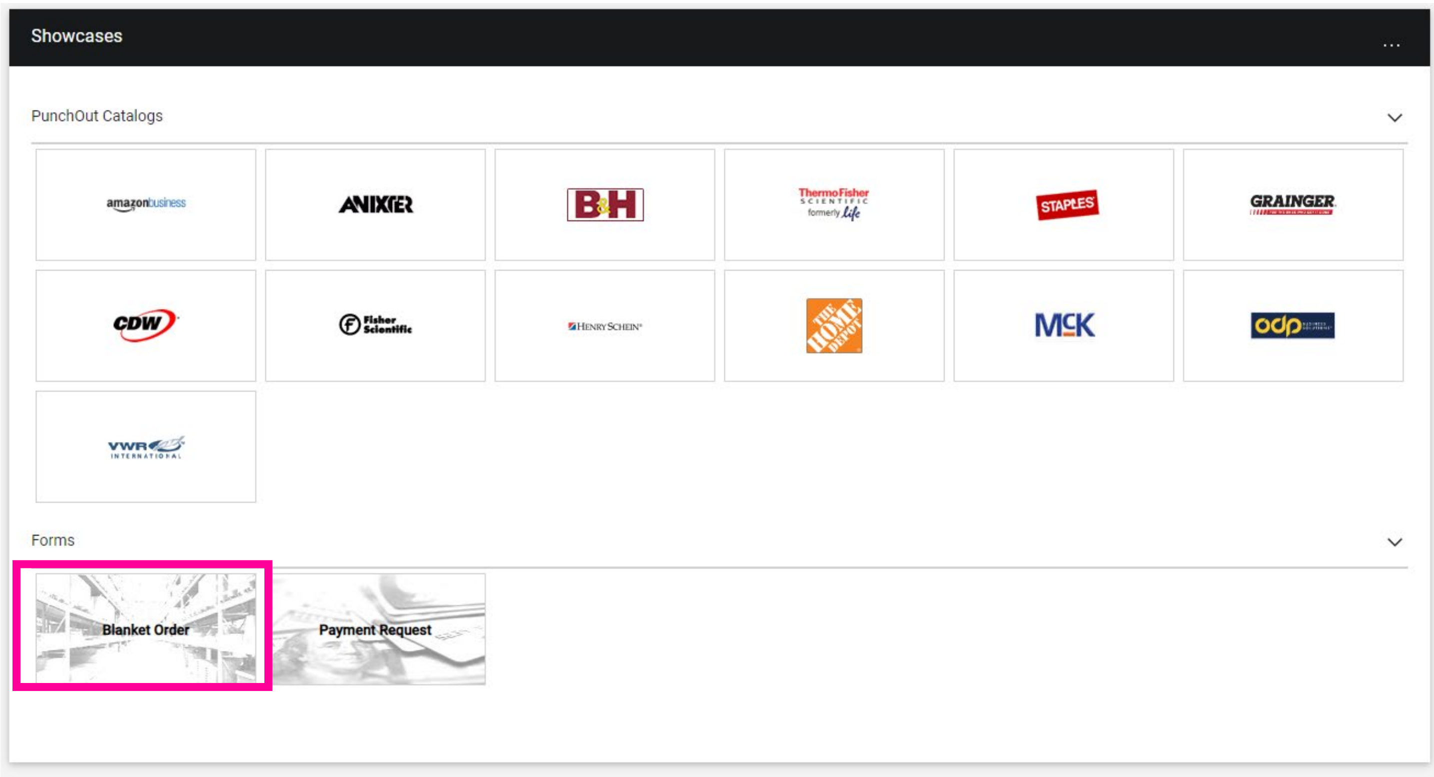
!! IMPORTANT NOTE !! *Please include the correct contract information (name, title, phone, email) for your contact at the hotel – hotel contracts often have language that U of I cannot agree to. Contracts and Purchasing Services will work with the hotel to adjust language as needed.*

Contract Blanket Orders (Contract Encumbrances)

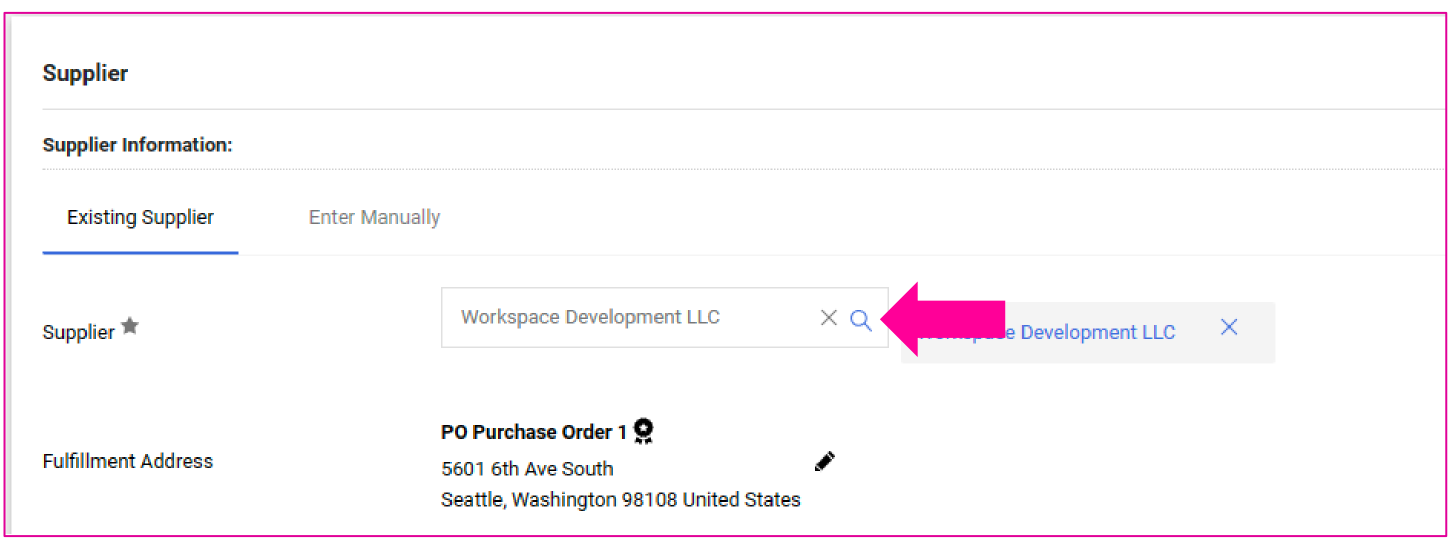
Departments now have the option to create a Blanket Order to encumber their fully executed contracts.

!! IMPORTANT NOTE !! *Invoices for contracts that have been encumbered should be sent to apdocs@uidaho.edu and reference the PO number.*

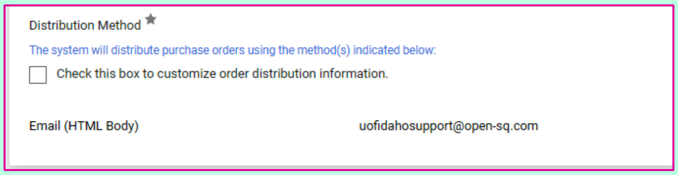
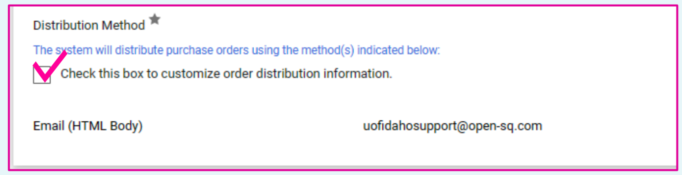
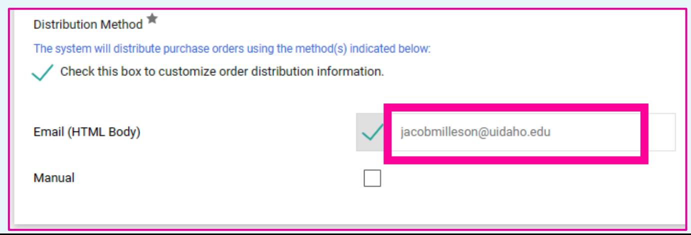
From the Shopping Dashboard, select the **Blanket Order** button.



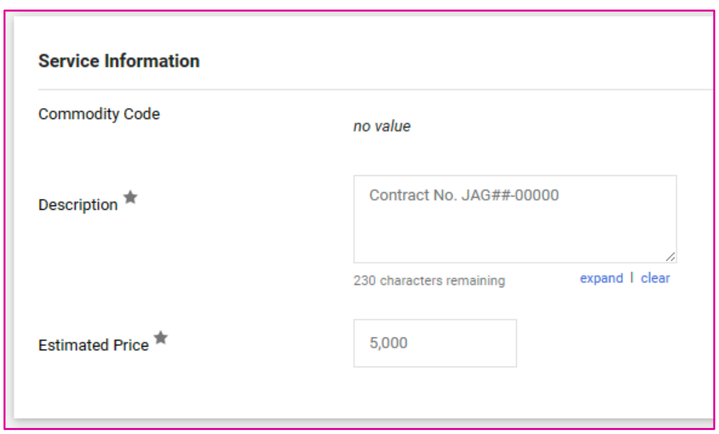
Select your **supplier** using the search tool.



Review the **Distribution Method**. The system will distribute purchase orders using the method(s) indicated.

DISTRIBUTE PO TO VENDOR	DO NOT DISTRIBUTE PO TO VENDOR
This method ***does distribute*** a copy of the Purchase Order to the vendor. To ensure that the vendor receives the PO number to invoice against, carefully review the email address(es) listed under the distribution method.  Distribution Method * The system will distribute purchase orders using the method(s) indicated below: Check this box to customize order distribution information. Email (HTML Body) uofidahosupport@open-sq.com	This method ***does not distribute*** a copy of the Purchase Order to the vendor. To edit the distribution method, begin by checking the box.  Distribution Method * The system will distribute purchase orders using the method(s) indicated below: Check this box to customize order distribution information. Email (HTML Body) uofidahosupport@open-sq.com After selecting the "*customize distribution method*" check box, change the email address to your own.  Distribution Method * The system will distribute purchase orders using the method(s) indicated below: Check this box to customize order distribution information. Email (HTML Body) jacobmilleson@uidaho.edu Manual

Under the Service Information section, complete the **Description** and **Estimated Price** fields.



Service Information

Commodity Code no value

Description * Contract No. JAG##-00000

230 characters remaining expand | clear

Estimated Price * 5,000

For the **Description** field, include the ***contract number*** (example: **JAG##-00000**) and any other relevant reference information.

For the **Estimated Price**, enter the total price of the contract – this will be the amount that will be encumbered.

Under Internal Information, you have the option to add notes for purchasing, or internal/external attachments. It is *not required to attach a copy of the agreement* to the Blanket Order form or Requisition.

Once the form is complete, Add the form to your cart, complete the Requisition and submit for approval. Contracts and Purchasing Services reviews all Blanket Orders.

Paying Contracts

Departments have two main options for paying completed contracts.

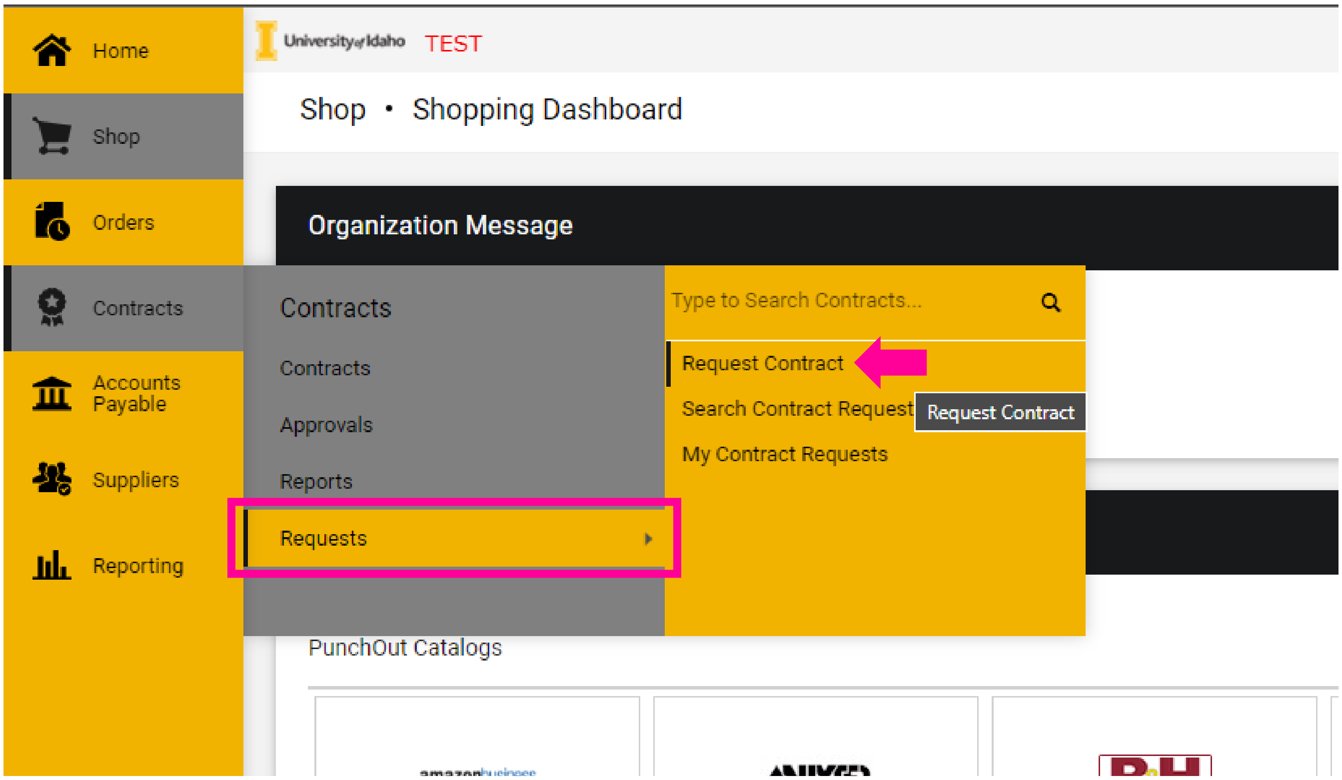
Option One: ***Contract Blanket Orders (Contract Encumbrances)*** for contracts that are encumbered after execution. Invoices should reference the PO number and be sent to apdocs@uidaho.edu to be applied to the Purchase Order.

Option Two: ***Payment Request Form*** for contracts that were not encumbered.

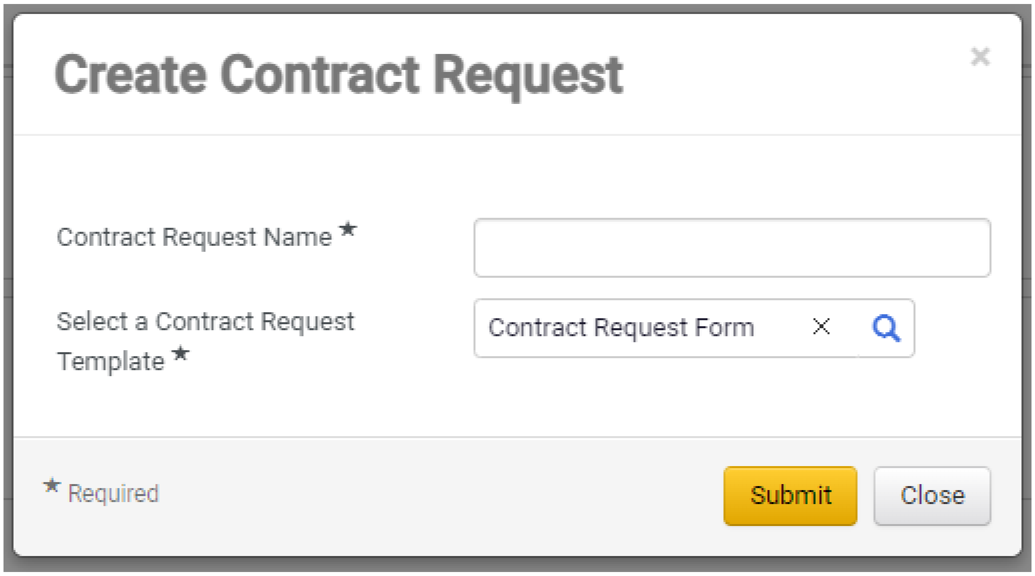
Requesting a Contract for Services – *Coming Soon!*

Most Faculty and Staff will have the JAGGAER role of “**Contract Requester.**” This role allows them to create requests for contracts that will be reviewed by their department’s assigned “**Contract Manager(s)**” (financial/administrative staff), and the department/area’s assigned “**Contract Approver**” (College/Division Fiscal Officer) before being approved by OSP and Contracts and Purchasing Services.

***THIS FEATURE IS COMING SOON *** To request a contract, begin by selecting the **Contracts+** module from the global left-hand navigation menu. **Contracts** > **Requests** > **Request Contract**.

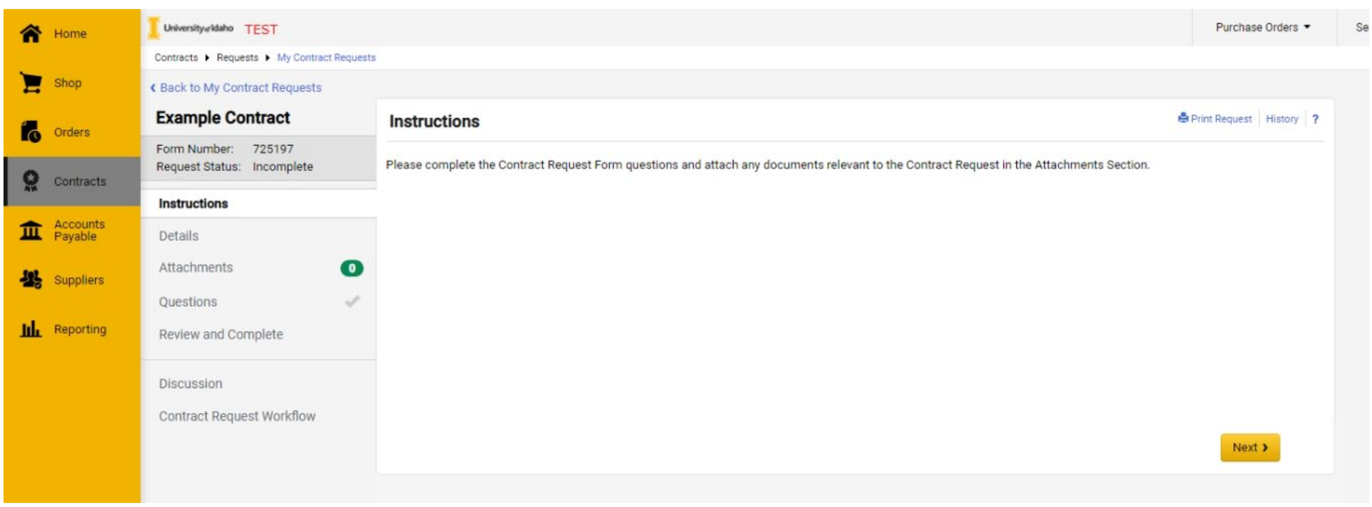


This will bring up the "**Create Contract Request**" dialogue box.

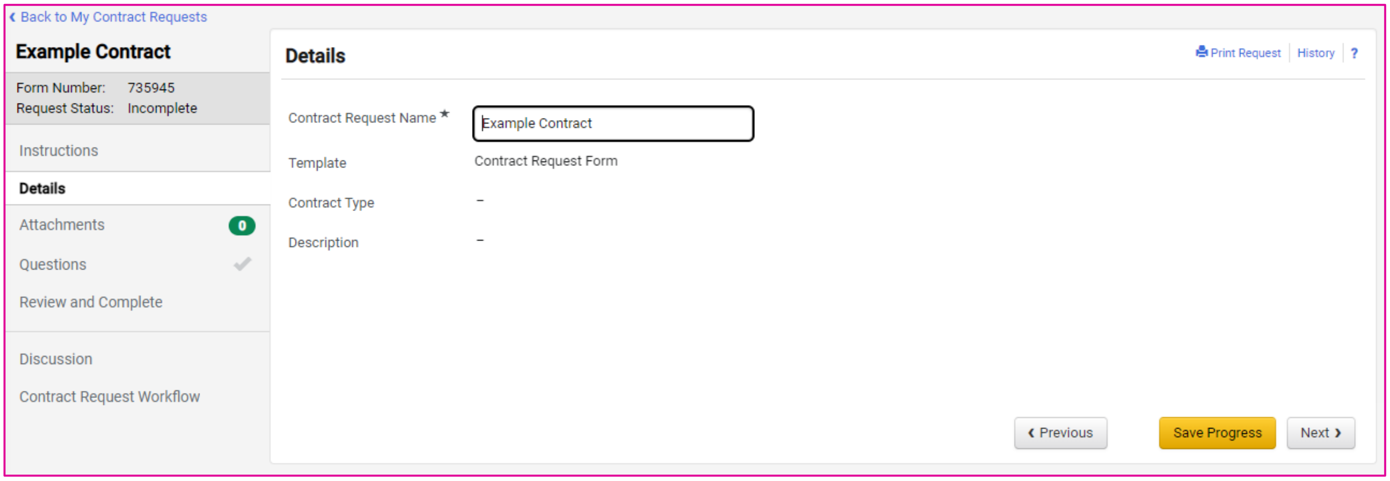


Once the contract request is submitted, you will see the contract request form. This form asks for additional information to begin "building" the contract.

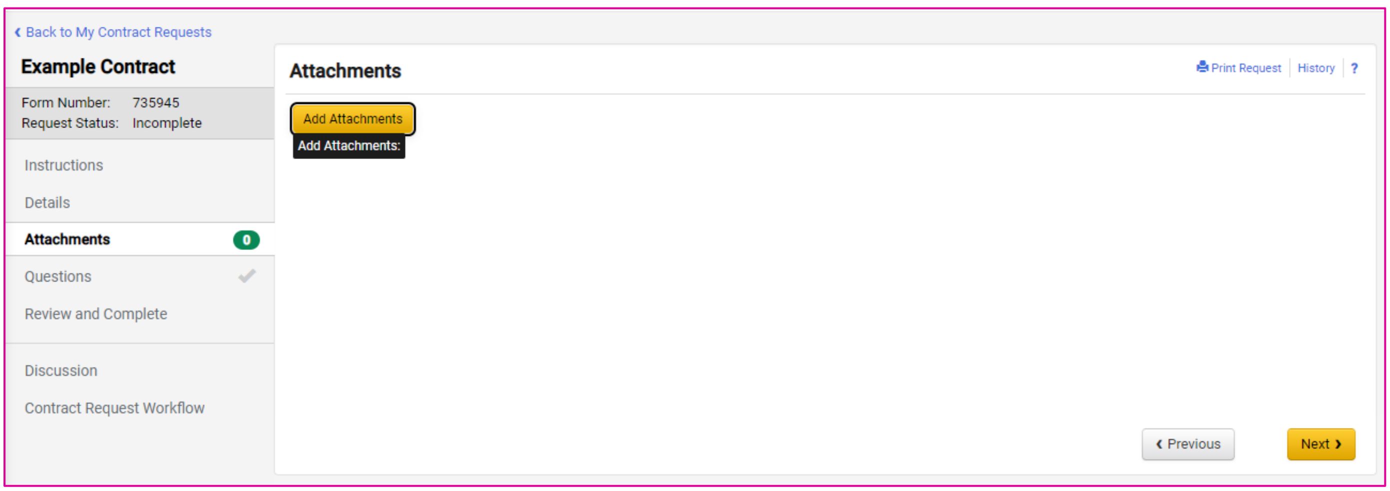
NOTE: *Much of this information will be built into the contract, so watch for spelling and capitalization errors.*



In the **Details** section of the contract request form, you will have the opportunity to edit the contract request name. It is best practice to keep this information something that both you and your administrative staff will recognize.



In the **Attachments** section, upload any relevant information that you might have as additional documentation for your administrative staff or Contracts and Purchasing Services.



Contract Request Questions

In the next section of the Contract Request form, you will answer the following basic questions about your contract:

Request Information:

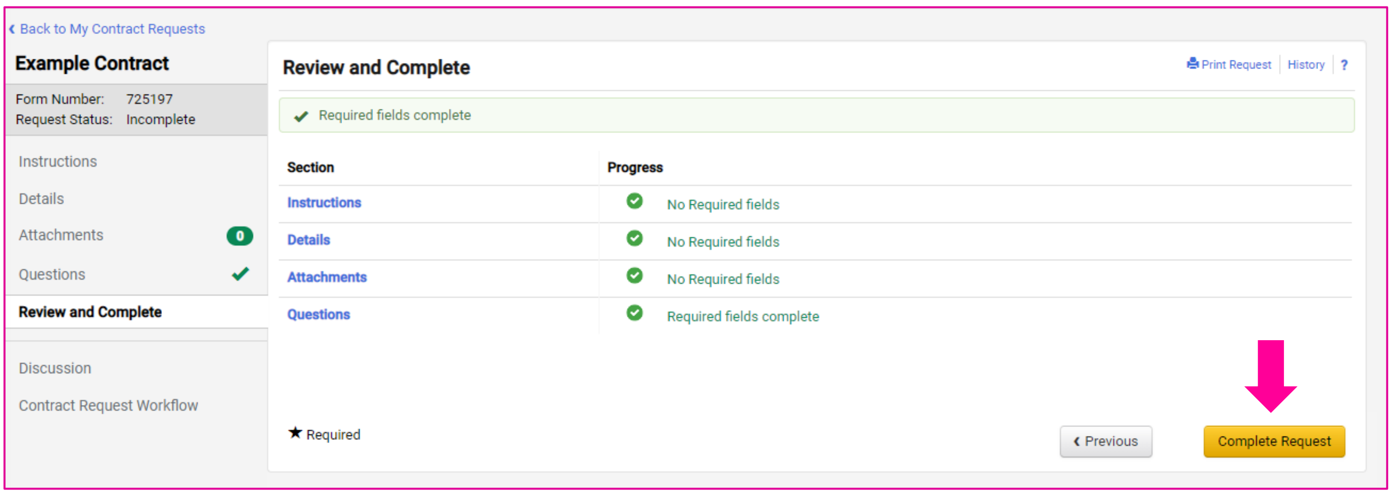
Field Name	Description
Contract Name*	This will be the name of the contract in JAGGAER and will also be included in emails to vendors.
Work Group*	Select your area – select the most specific work group as possible. *For example: select "Vandal Brand Meats" or "Plant Sciences" instead of the "College of Agricultural and Life Sciences" work group.*
Start Date*	Date that contract begins. *NOTE: Leave time for contract to be approved and executed.*
End Date	The End Date is used to specify the date on which the contract is no longer available for use. This field, in combination with the Start Date defines that date range when this contract is "effective".
Second Party*	The party that we are doing business with. ***!! Will need to be a vendor in Banner !!***
Additional Second Parties	Optional. Rarely used. Child field from above.
Description of Service*	The contract Summary field is a field that describes a contract's general nature or purpose, its SLA, or instructions regarding its use. End users may see this field in several places in the application, including the Supplier Info and Contract Info popup.
INDEX*	The six-digit index that will be used for this contract.
Additional INDEX	Optional second index that will be used for this contract.
Total Contract Amount*	Total contract amount.

***Required fields**

Requester Information:

Field Name	Description
Requester Name*	Please use your first and last name, this information is populated into the contract.
Requester City*	Please use your city for your office location in Idaho. This information is populated into the contract.
Requester Zip Code*	Please use your 5-digit zip code for your office location in Idaho. This information is populated into the contract.
Requester Phone Number*	Please use your office phone number. Format ###-###-#### (with dashes) This will be populated into the contract.
Requester Email*	Please use your University of Idaho email address. This will be populated into the contract.

Once you have completed all the required fields you can complete the request. The request will be sent to a “**Contract Manager**” within your college/department to create the contract.



Contract Request Statuses

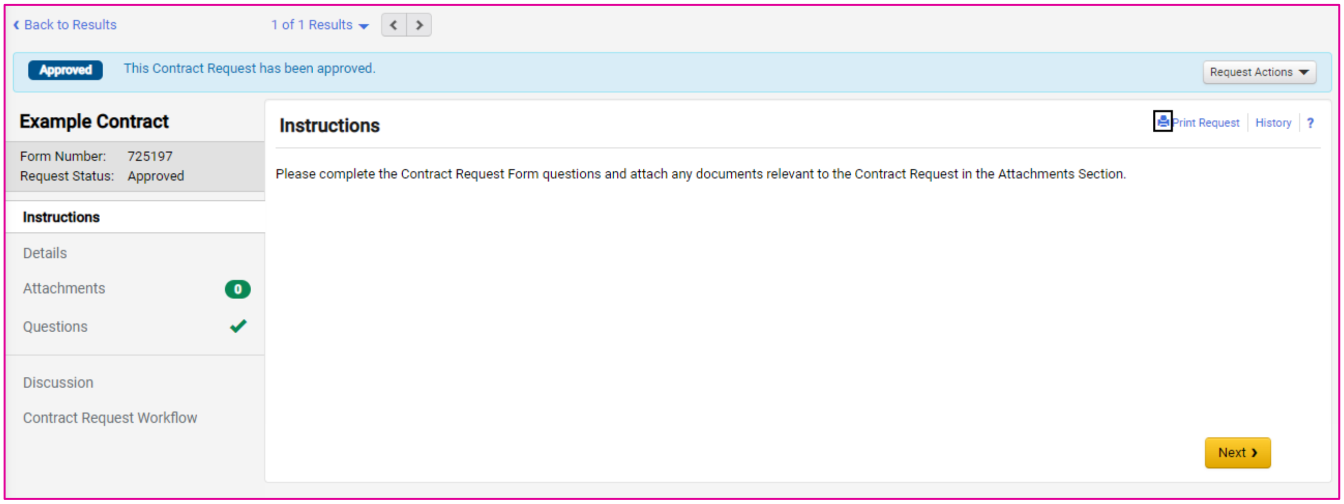
You can check the status of your Contract Requests by going to **Contracts** > **Requests** > **My Contract Requests.** From the global left-hand navigation menu.

The assigned Contract Managers will receive an email notification when you complete your contract request based on the Work Group you selected.

Creating a Contract from a Request

Once a Contract Request is submitted, it will need to be approved by the Work Group Approver (commonly the area fiscal officer) before a contract manager can take the information from the request and “flip” it into a contract form.

When the Contract Request form has been approved, you will see a blue bar that says approved.



Select the “**Request Actions**” 

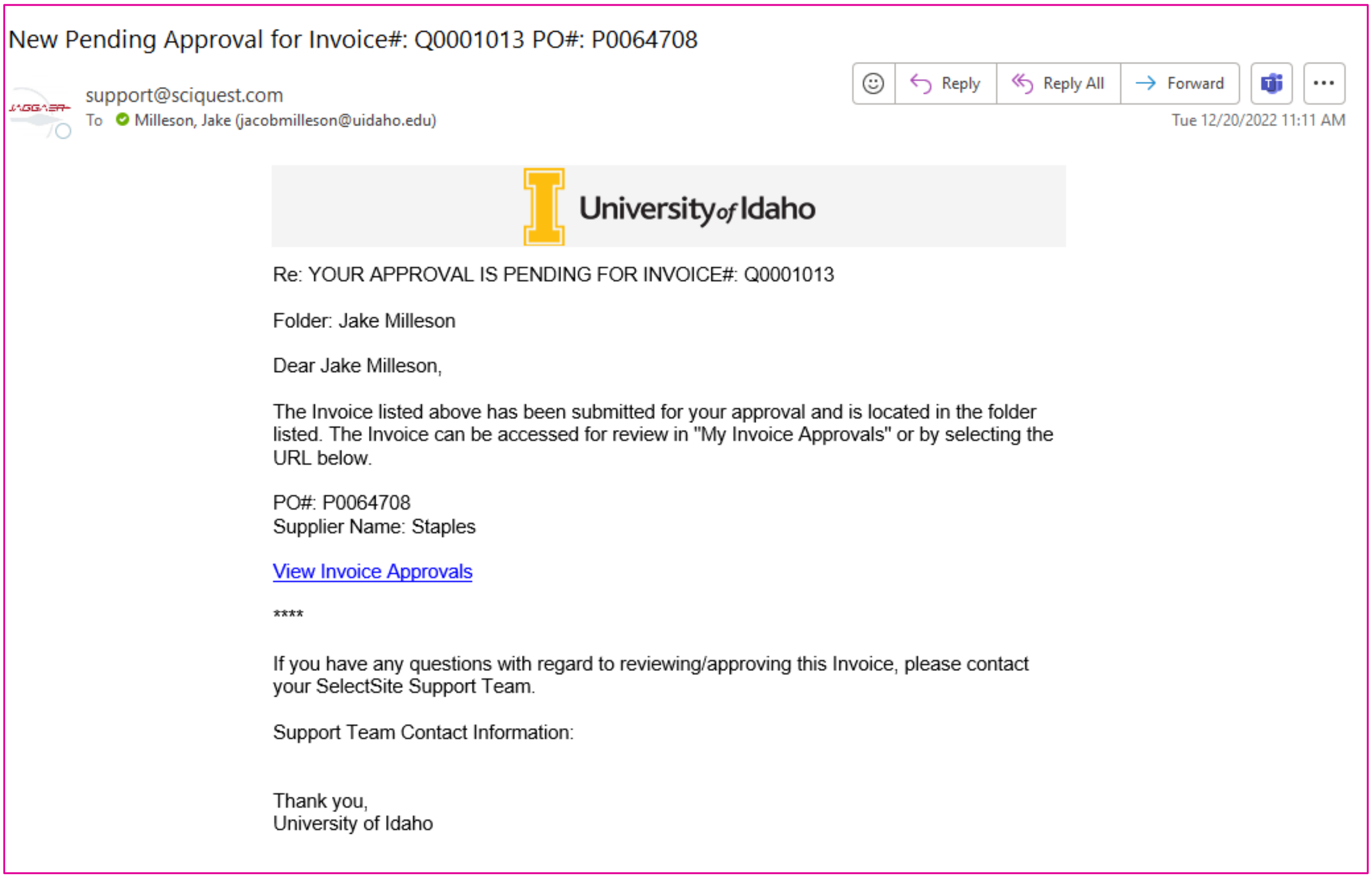
button on the right side of the blue bar and then “**Create Contract**” to open the Create Contract dialogue box.

Section 4: Accounts Payable

University of Idaho

PunchOut Invoices

PunchOut Invoices will automatically be sent to JAGGAER via the cXML integration with the vendor. You will receive an email notification when an invoice is pending approval from a PunchOut vendor.



New Pending Approval for Invoice#: Q0001013 PO#: P0064708

support@sciquest.com

To Milleson, Jake (jacobmilleson@uidaho.edu)

Reply | Reply All | Forward

Tue 12/20/2022 11:11 AM

University of Idaho

Re: YOUR APPROVAL IS PENDING FOR INVOICE#: Q0001013

Folder: Jake Milleson

Dear Jake Milleson,

The Invoice listed above has been submitted for your approval and is located in the folder listed. The Invoice can be accessed for review in "My Invoice Approvals" or by selecting the URL below.

PO#: P0064708
Supplier Name: Staples

View Invoice Approvals

****

If you have any questions with regard to reviewing/approving this Invoice, please contact your SelectSite Support Team.

Support Team Contact Information:

Thank you,
University of Idaho

Non-Catalog Invoices

Invoices received for a non-catalog PO should be sent to Accounts Payable (apdocs@uidaho.edu) for entry. DO NOT ENTER AS A PAYMENT REQUEST.

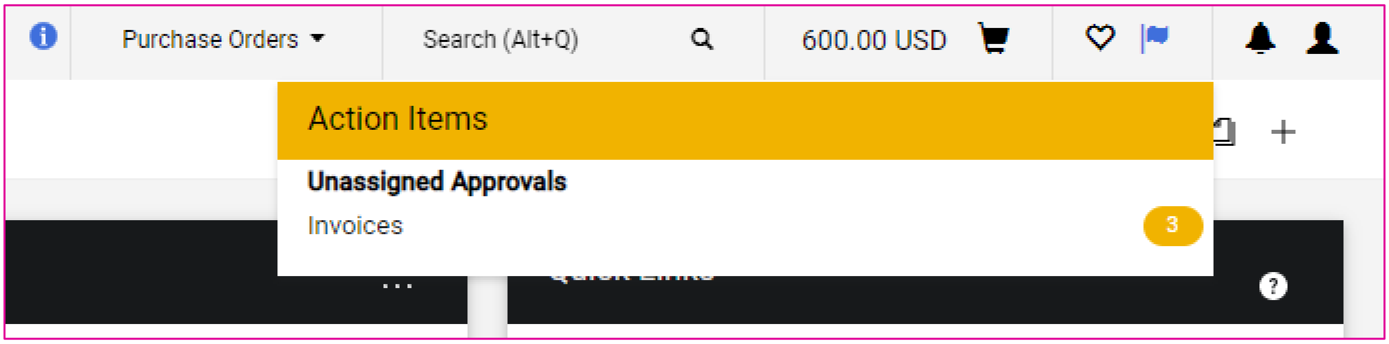
Once an invoice is entered by the Accounts Payable team, the ***Shopper*** will receive a system-generated email letting them know that they have an invoice ready to approve.

You can view your current Invoice approvals by navigating to **Accounts Payable > Approvals > Invoices to Approve**. Invoices should be approved in accordance with APM Chapter 75 for more details contract ap-staff@uidaho.edu.

Invoice Approvals

Invoices should be approved in accordance with Accounts Payable Policy. Invoices should be approved once the item has been received. Please see APM Chapter 75 for more details or contract ap-staff@uidaho.edu.

To view your pending invoice approvals, you can navigate to your action items flag  and select “Invoices” (if there are any).



Alternatively, you can access your invoice approvals by going to **Accounts Payable > Approvals > Invoices to Approve.**

Change Invoice Accounting

In the event you need to have the accounting information changed or adjusted for a Purchase Order Invoice – ***BEFORE APPROVING*** – email Ashley *and* Melissa to have the change made. Please include the invoice number and how you would like the accounting information to be changed.

Ashley Wells: twells@uidaho.edu
Melissa Hadaller: mhadaller@uidaho.edu

PLEASE NOTE: If the invoice is completed before the accounting information is changed, a cost transfer will be required. AP will not adjust invoice accounting for Blanket Order Invoices or some PunchOut orders due to system limitations.

Credit Memos

Credit Memos received for a non-catalog PO should be sent to Accounts Payable (apdocs@uidaho.edu) for entry.

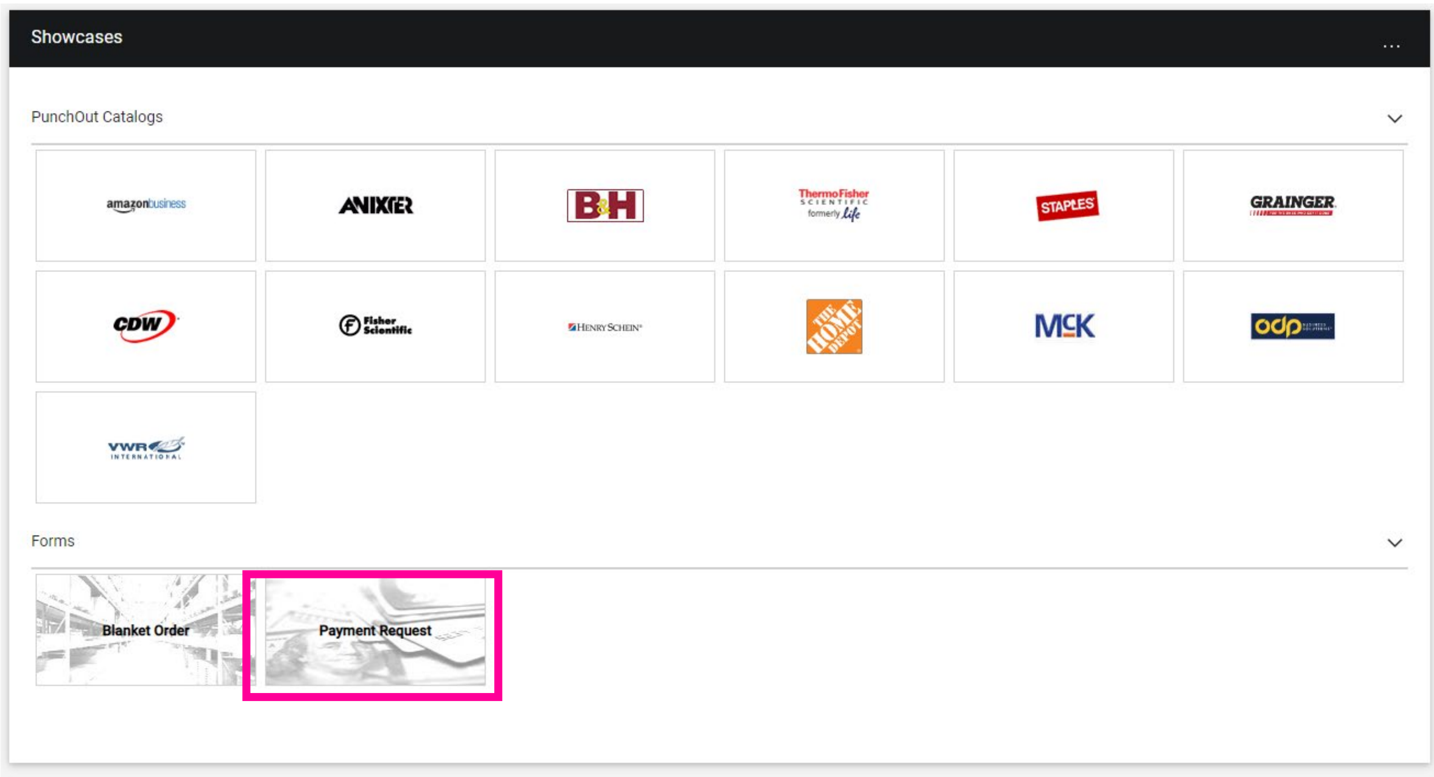
Once a Credit Memo is entered by the Accounts Payable team, the ***Shopper*** will receive a system-generated email letting them know that they have an invoice ready to approve.

Payment Request Form

The Payment Request Form replaces most VandalWeb Claim Vouchers and allows you to request payments to vendors using an invoice for services where a Purchase Order was not initially created. To pay an invoice against a purchase order visit the section ***Non-Catalog Invoices***.

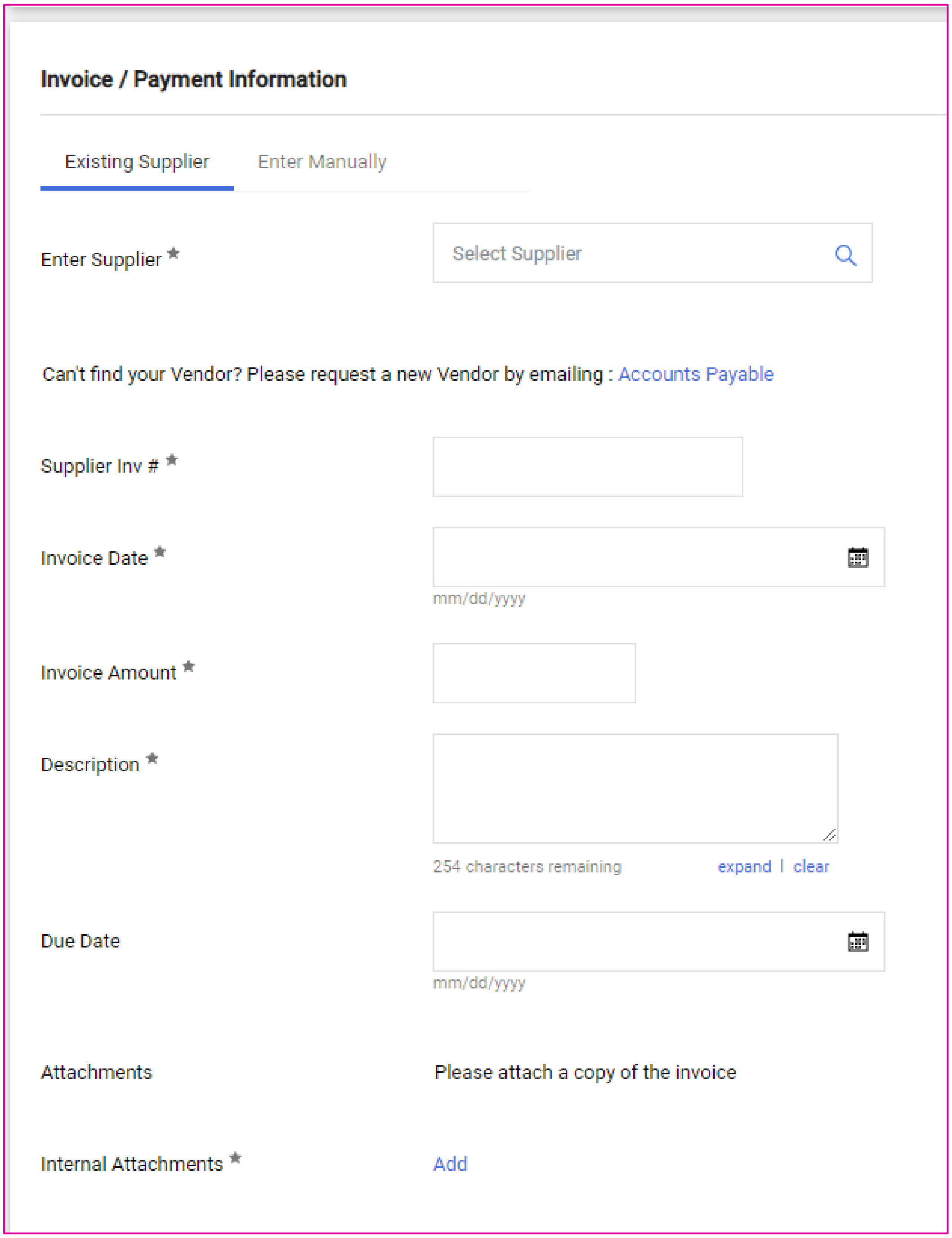
!! IMPORTANT NOTE !! *If paying an individual, please continue to use the Claim Voucher Process in VandalWeb.*

To begin a Payment Request, select the form from the Shopping Dashboard.

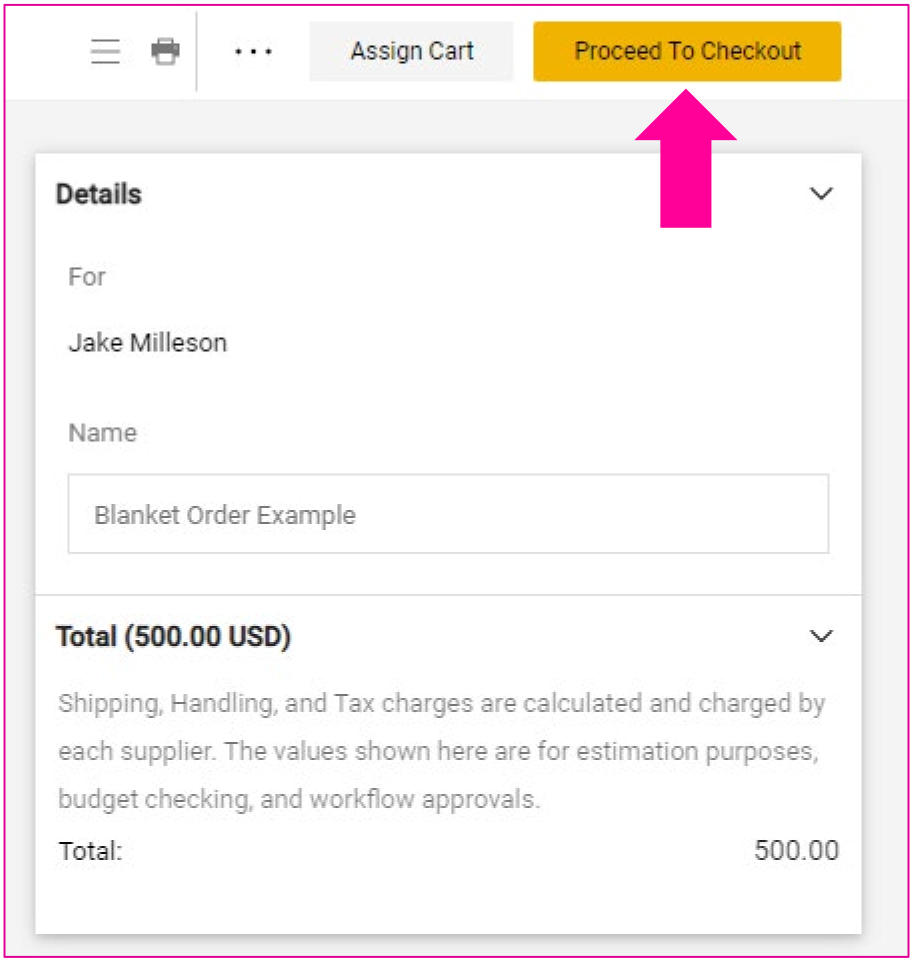


The form asks for simple information. Your vendor will need to be in PaymentWorks/Banner to display in the supplier selection box. Email ap-staff@uidaho.edu for assistance.

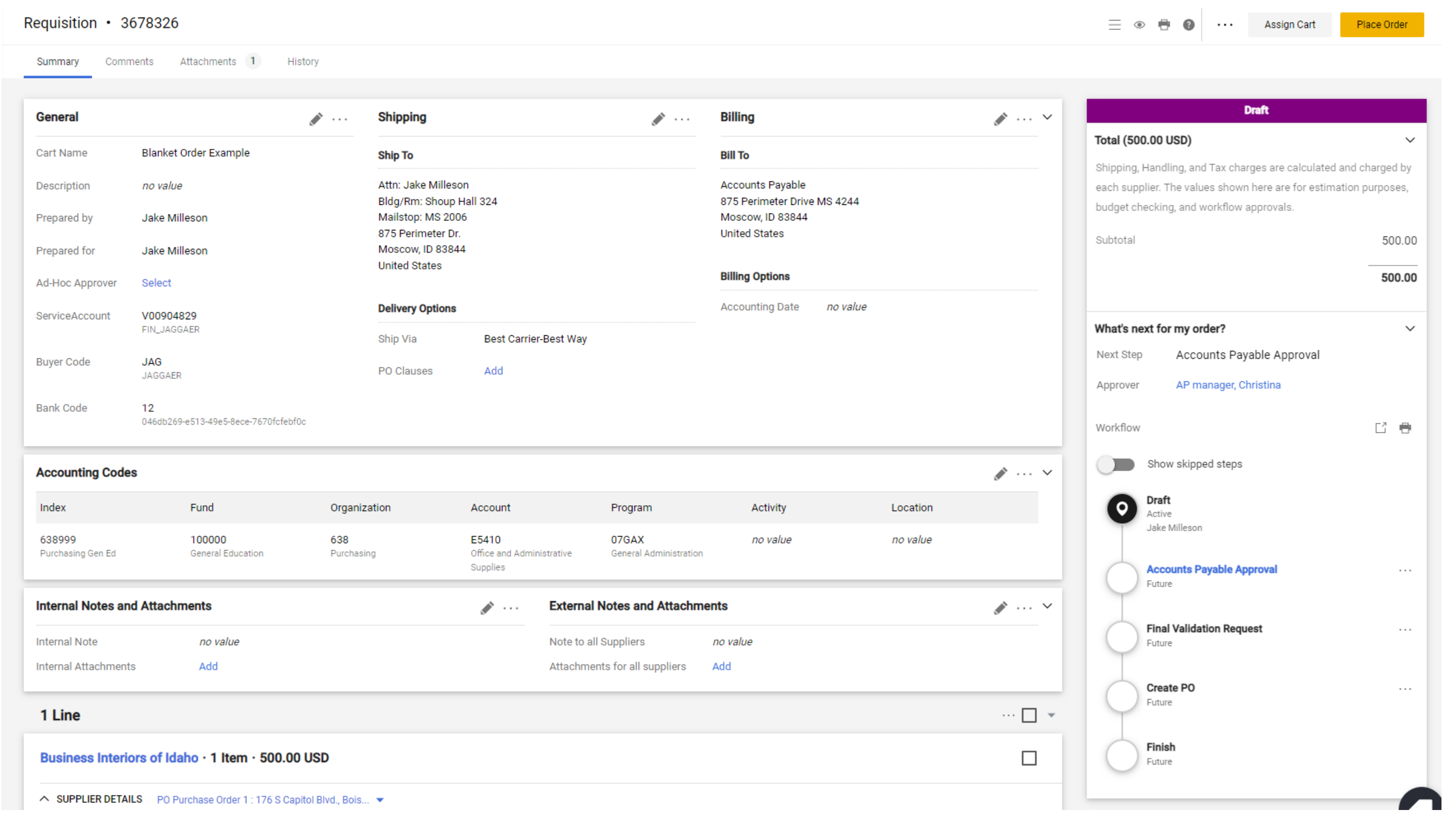
The Payment Request form requires basic information about the invoice, including the selection of the appropriate Remit To address.



Once you have created your request, it will add the total to your shopping cart, and you can either assign the cart or proceed to checkout.

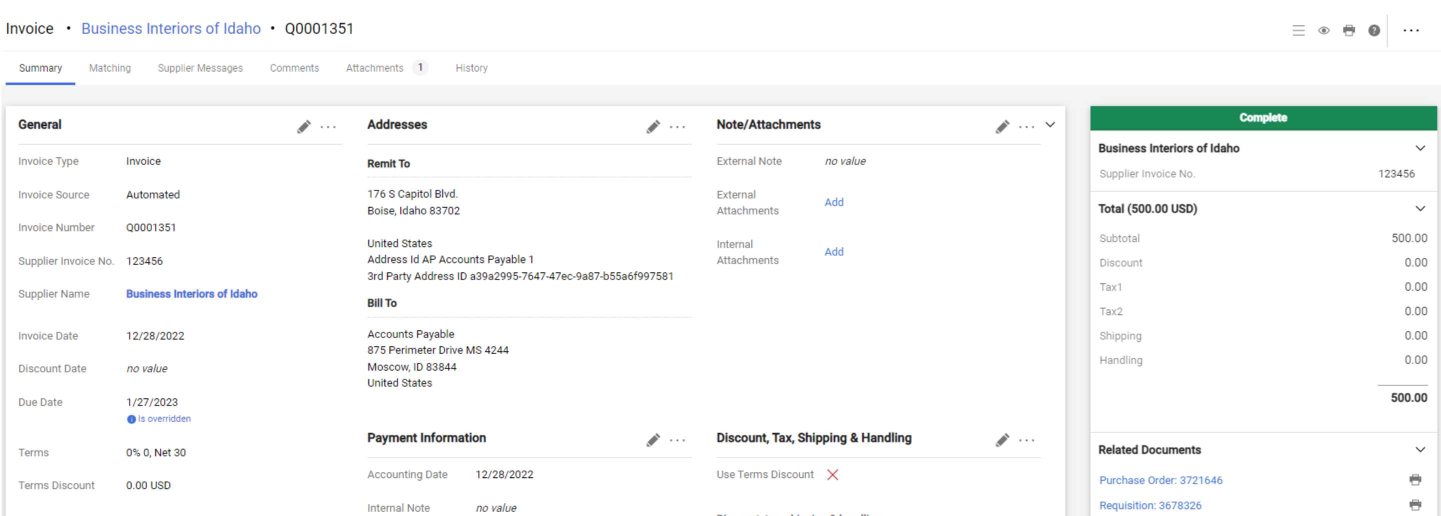


Once you proceed to checkout, you will see the requisition screen and you can select your **Accounting Codes**, and add additional documentation.



When ready, you can select the "**Place Order**" button to send to Accounts Payable staff for review and approval.

Once Accounts Payable approves the invoice, a JAGGAER Purchase Order is created and then the Invoice is automatically approved and sent to Banner with a Q invoice number.



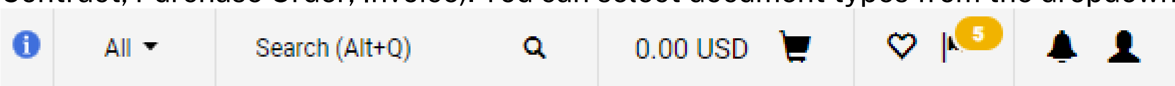
Section 5: Appendix

University of Idaho

Quick Reference

Action Bar search tips

When using the Action Bar Search it is best to select which document type you are searching for (i.e., Contract, Purchase Order, Invoice). You can select document types from the dropdown.



The application defaults to the last search type.

Adding substitute (proxy) approvers

You can add a substitute or proxy approver to any of the approval queues you are in. These can be set up to be permanent or for a set date range for when you will be gone.

Shopping Cart Substitute Approver set-up

- Shop > My Carts and Orders > View Carts
    - Select "*Assign Substitute*" under the "*Assigned Carts*" tab.

eProcurement Substitute Approver set-up

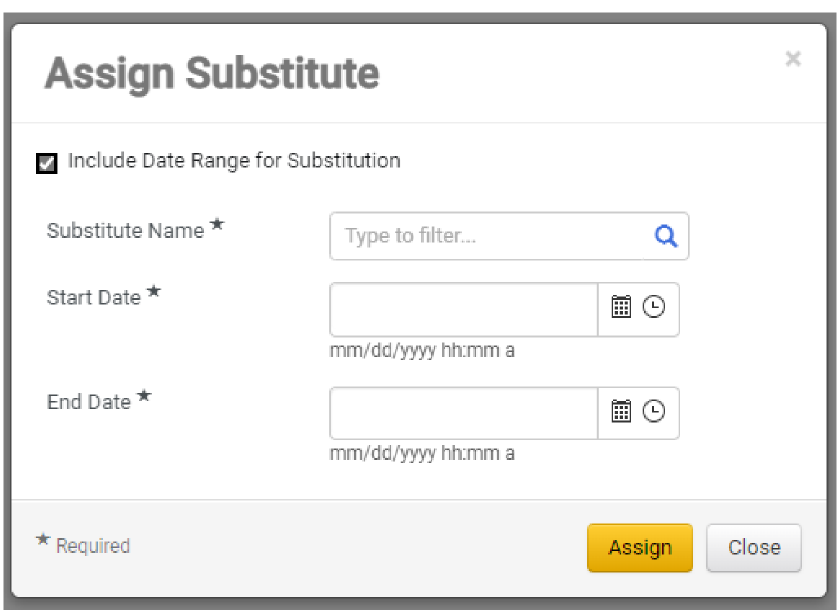
- Orders > Approvals > Assign Substitute Approvers-Requisitions
- Orders > Approvals > Assign Substitute Approvers-Purchase Orders

Accounts Payable Substitute Approver set-up

- Accounts Payable > Approvals > Assign Substitute Approvers-Invoices
- Accounts Payable > Approvals > Assign Substitute Approvers-AP Requests
    - Payment Requests

Contracts+ Substitute Approver set-up

- Contracts > Approvals > Assign Substitute Approvers-Contracts
- Contracts > Approvals > Assign Substitute Approvers-Contract Requests



Adding Vendors to JAGGAER
If your vendor that you are needing to use is not showing up in vendor search results there may be a few reasons why. This section below gives you a brief overview of how to populate your vendor in JAGGAER.

If Vendor is…
- **Listed in Banner/has a known Banner GID** – email jaggaer@uidaho.edu and/or ap-staff@uidaho.edu with Vendor GID and preferred email address (email used for PO Distribution).
- **Vendor has been terminated** – Contact ap-staff@uidaho.edu before creating a PaymentWorks invite.
- **Is not a registered vendor** – Initiate a PaymentWorks invite.

If you have questions or issues with finding/onboarding a vendor contact Accounts Payable ap-staff@uidaho.edu.

User Roles and Permissions
There are several different user roles and permissions that live in JAGGAER. This is a sample for reference. Please note that there are roles between the eProcurement module and the Contracts module that have similar names, but different levels of permissions. You can view your assigned roles by going to your JAGGAER profile and selecting "**Assigned Roles**."

What is "SciQuest" and why do I get emails from support@sciquest.com?

JAGGAER is formally known as SciQuest. The company rebranded in 2017 and not all areas have been updated to reflect the change. U of I does not know if/when you can expect to see a change in email addresses, etc, to reflect the name change.

Simply stated: SciQuest = JAGGAER.

Activity Code Behaviors

The below table describes the expected behavior between JAGGAER and Banner for the different types of "default" Activity Code scenarios an Index can have.

In JAGGAER Activity Code is…	In Banner Activity Code is…	Activity Code is posted as… (in Banner)
Blank	Blank	Blank
Blank	Default set	Default is inserted
Selected to Banner Default	Default set	Activity code accepted from JAGGAER
Different than Banner Default	Default (set to allow override)	Activity code accepted from JAGGAER (overridden)
Different than Banner Default	Default (set to not allow override)	Cart is returned in JAGGAER (does not pass validation)

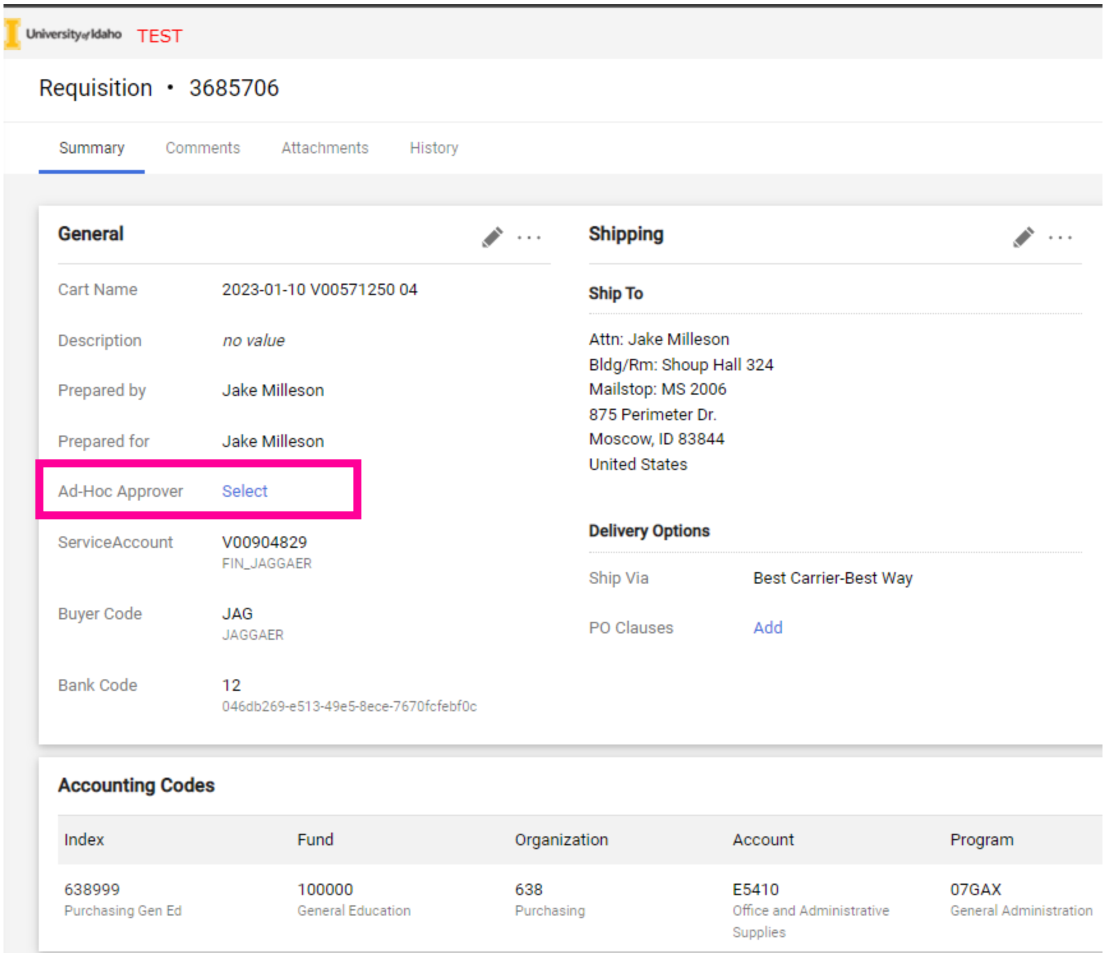
Ad-Hoc Approvers

In JAGGAER, you can add additional approvers to the workflow by selecting Ad-Hoc Approvers. These can be utilized to record approval by other stakeholders not typically a part of the workflow.

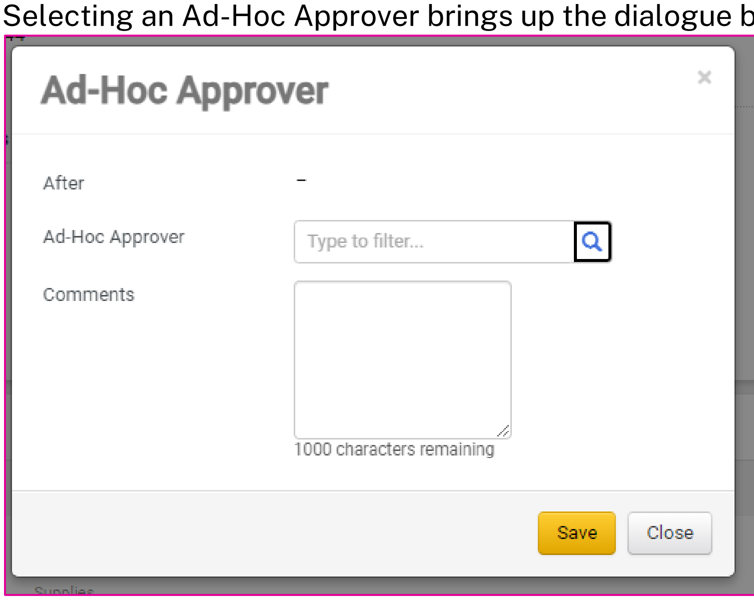
Ad-Hoc Approvers can be added during the requisition stage once the cart is created. Under the **Summary** tab of the ribbon, and under the **General** section you can select an Ad-Hoc Approver.

Ad-Hoc is only available if the Requisition will trigger a workflow rule such as:

- Procurement Review (purchase is greater than $10k from a non-catalog vendor, or $50k from a PunchOut)
- OSP Approval (purchase is greater than $10k and on a grant)
- NSF Review (purchase is on one or more indexes that are NSF) – *appears after requisition submittal.*



Selecting an Ad-Hoc Approver brings up the dialogue box:



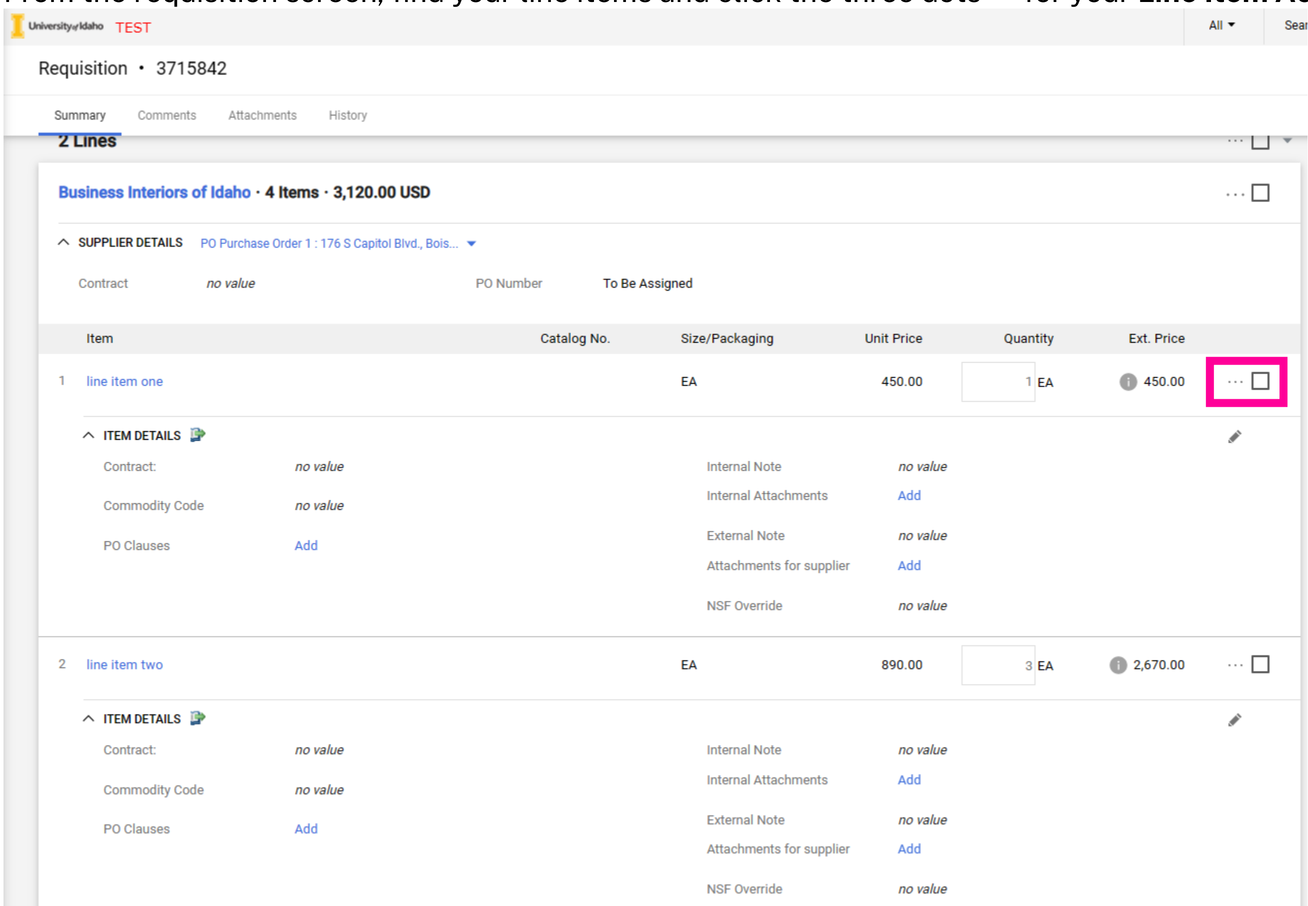
Adding multiple Accounting Codes to a JAGGAER transaction

It is best practice to split Accounting codes at the Line-Item level of the transaction; splitting at the header level can cause errors in Banner when creating the Purchase Order.

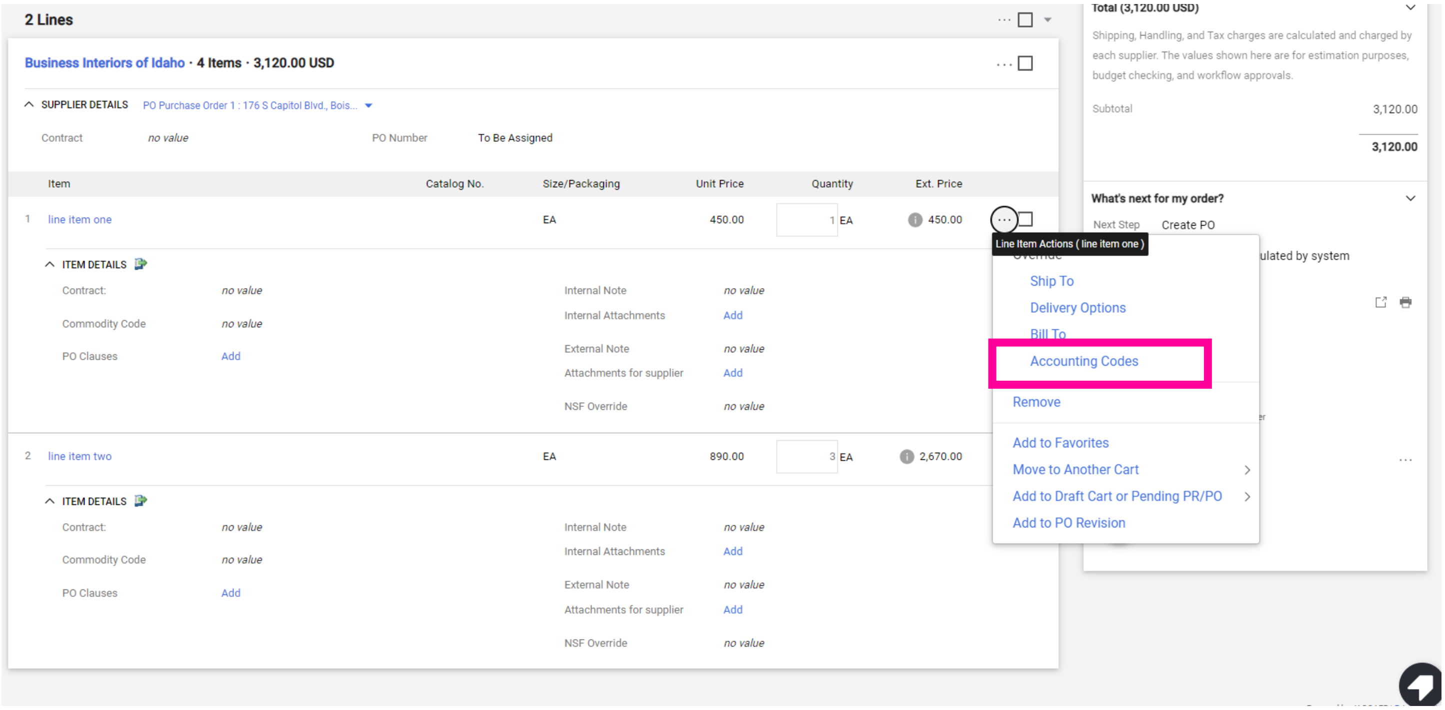
Adding multiple Accounting Codes at the Line-Item Level

To split or add multiple accounting codes at the line-item level, you will need to be on the requisition screen.

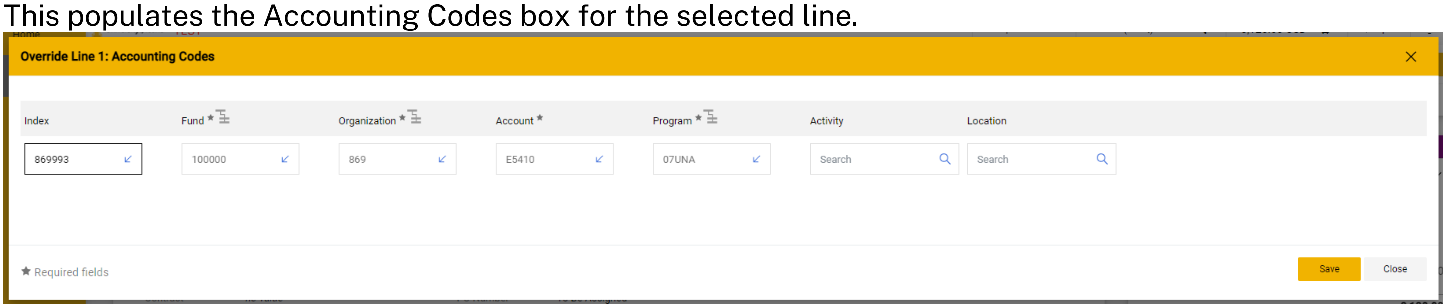
From the requisition screen, find your line items and click the three dots ••• for your **Line Item Actions**.



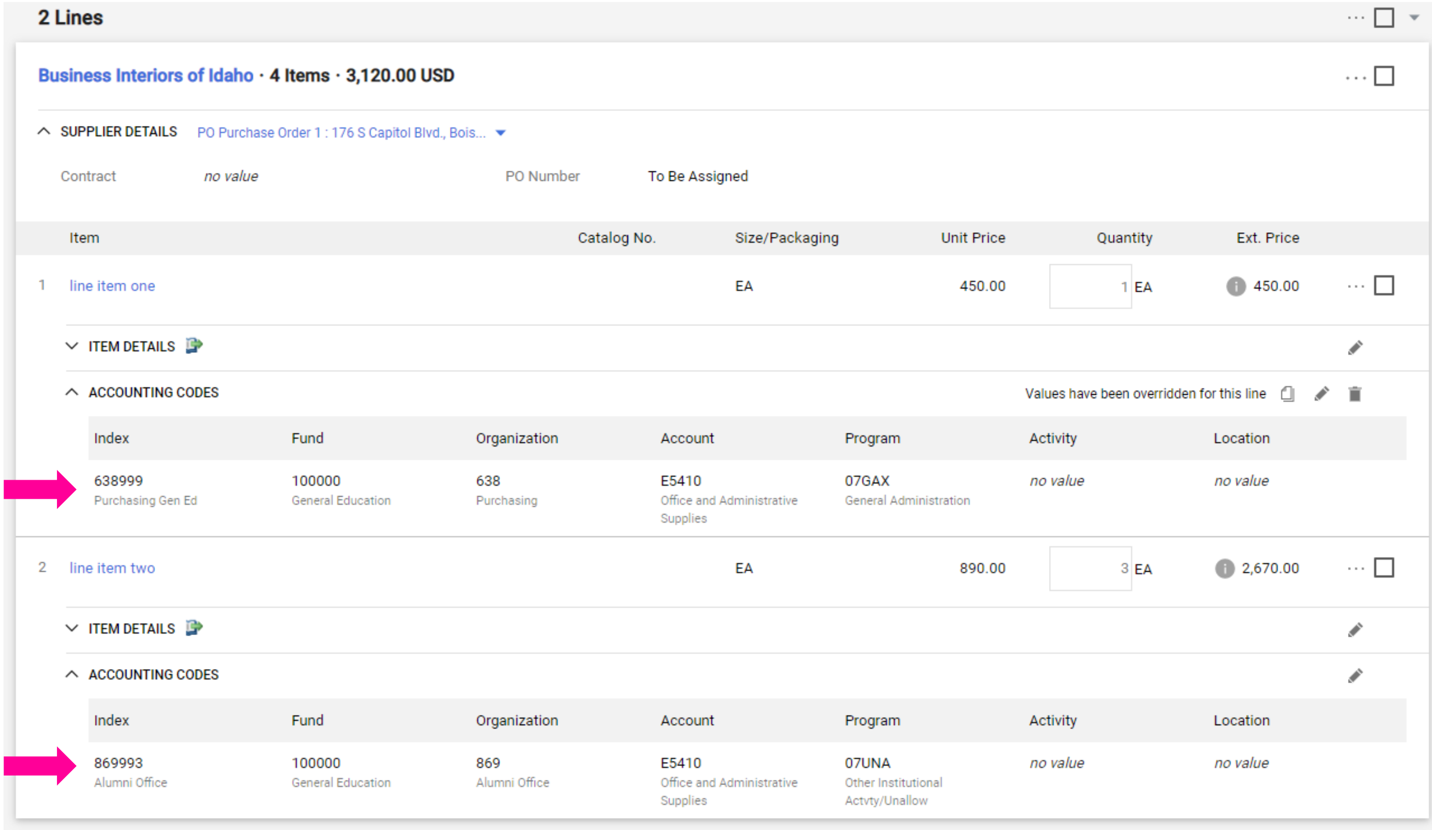
Under **Override**, select **Accounting Codes**.



This populates the Accounting Codes box for the selected line.

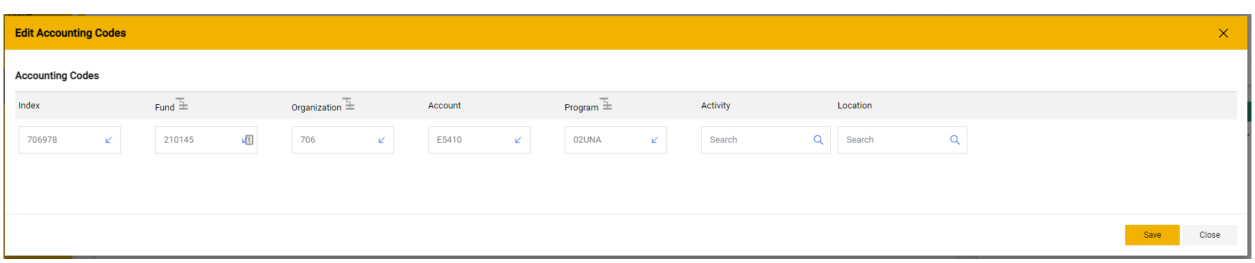


Once changed, you will have accounting codes for each line item.

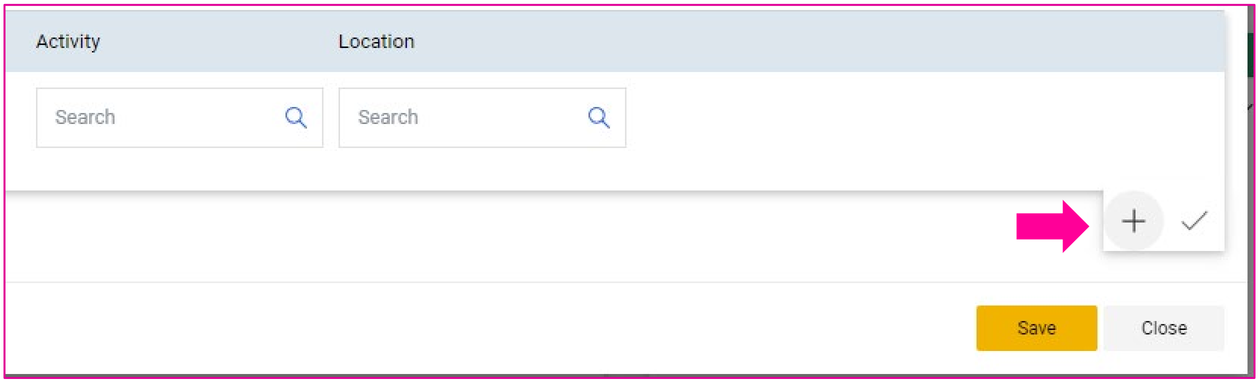


Adding multiple Accounting Codes at the Header Level

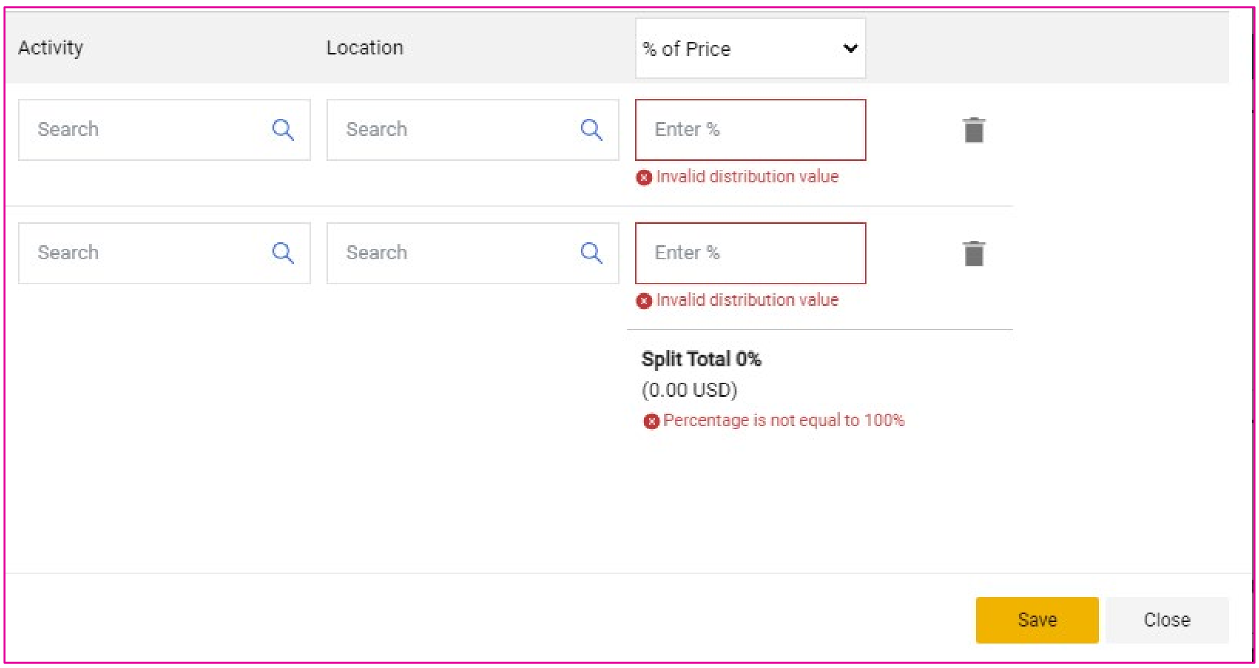
You can add multiple Accounting Codes to a JAGGAER transaction by opening the "**Edit Accounting Codes**" dialogue box. *It is best practice to split Accounting codes at the Line-Item level of the transaction; splitting at the header level can cause errors in Banner when creating the Purchase Order. Do not mix asset and non-asset Account Codes at this level.*



After adding your first line, you can click the "+" icon next to the validation checkbox. This will add an additional line.



Once you have your additional line(s) you can add the appropriate index and account numbers and determine your split. You can split based on: % of Price, % of Quantity, or Amount of Price.

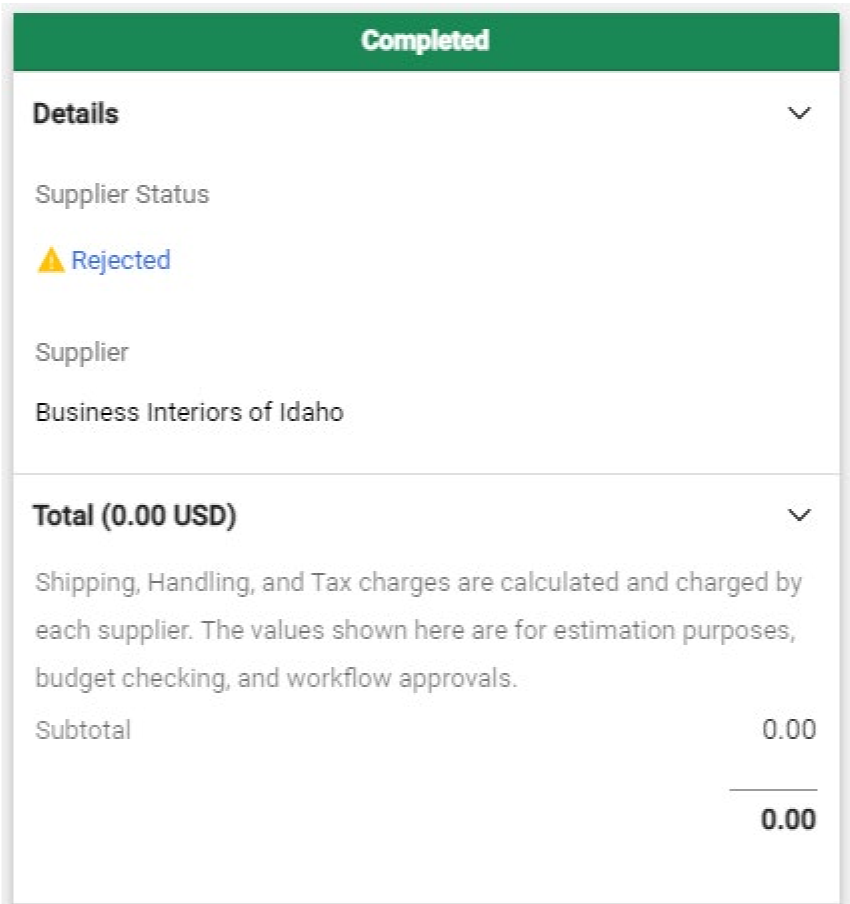


You will need to have your split balanced before proceeding with the order.

Cancel Purchase Order

To cancel a Purchase Order, please email purchasing@uidaho.edu with the PO number and reason for cancelling.

Once the PO has been cancelled and workflow is complete, you will see that the Supplier Status in the sidebar will show "**Rejected**" and the total for the order has been changed to **0.00**.



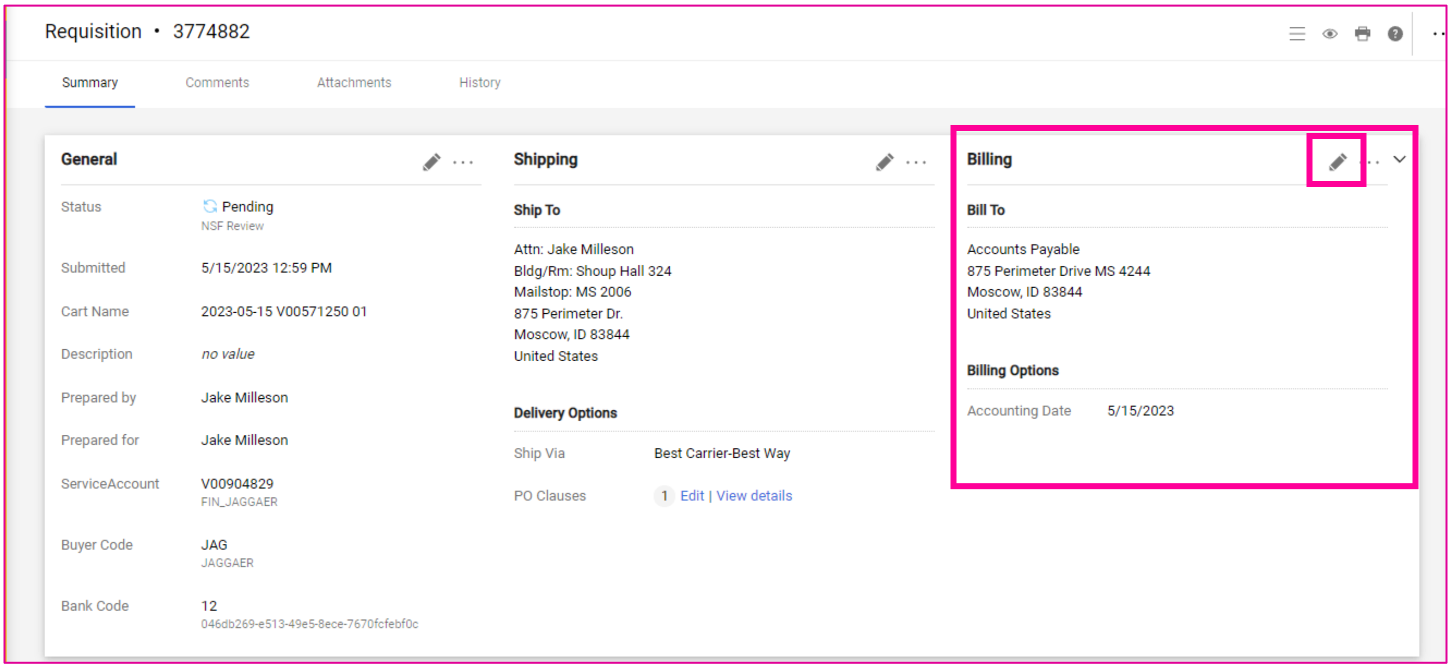
To verify that the Purchase Order has been successfully disencumbered in Banner you can check using FGIENCD and entering the PO number.

Change Fiscal Year (Accounting/Transaction Date)

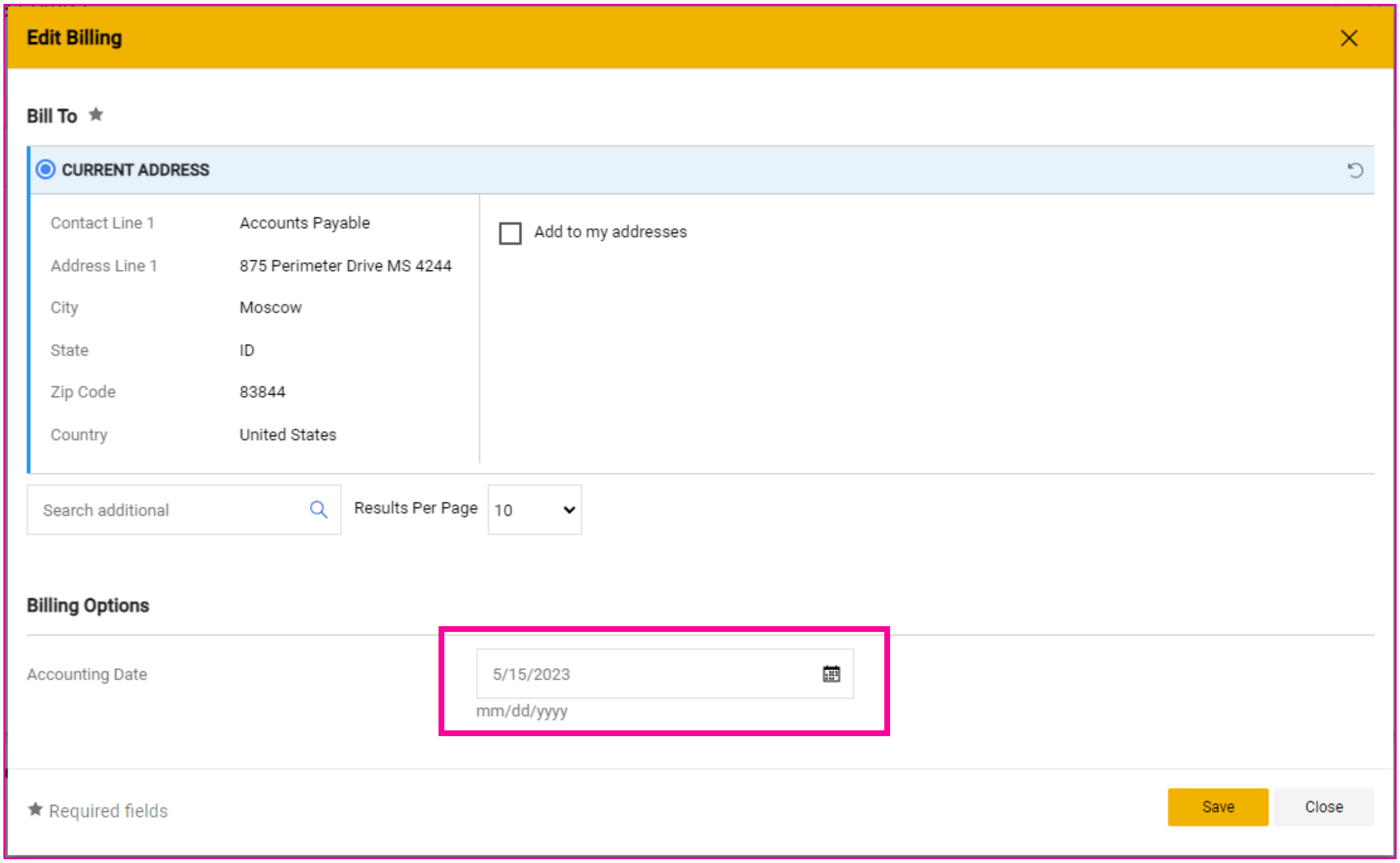
By default, requisitions are set to post in the current accounting period. To change the accounting date to a future date, such as the next fiscal year, follow these steps below.

Note: The accounting date must be set to an open accounting period. Transactions will not process if the selected accounting period is not open in Banner.

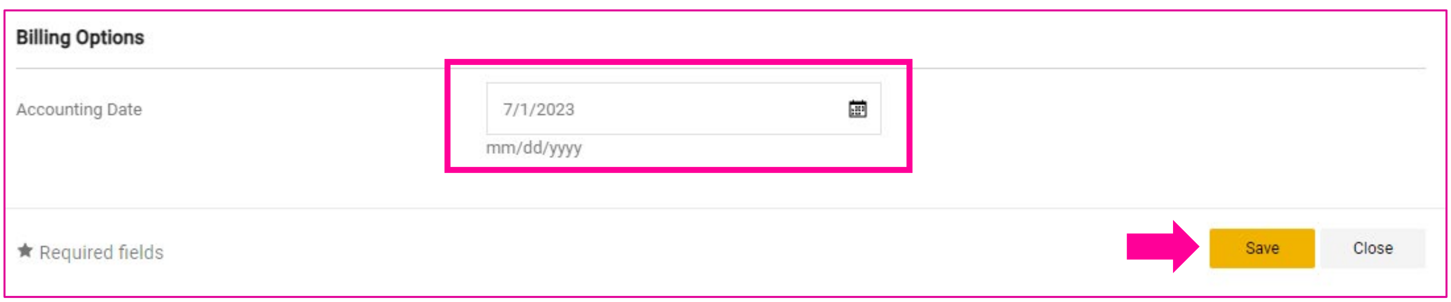
From the Requisition screen, select the pencil icon next to **Billing**.



Under **Billing Options** use the date selector tool to select your desired accounting date. *Note: The accounting date must be set to an open accounting period. Transactions will not process if the selected accounting period is not open in Banner.*



Once you have selected your desired accounting date. Select **Save**.



Review and process the rest of the requisition as normal. Once the order is placed and approved, the PO will post to the selected accounting period.

Change Order Owners

Occasionally, it may be appropriate to change the "Order Owner" in JAGGAER. By default, the Order Owner is the person who initiates the requisition and is who invoices will be routed to for approval.

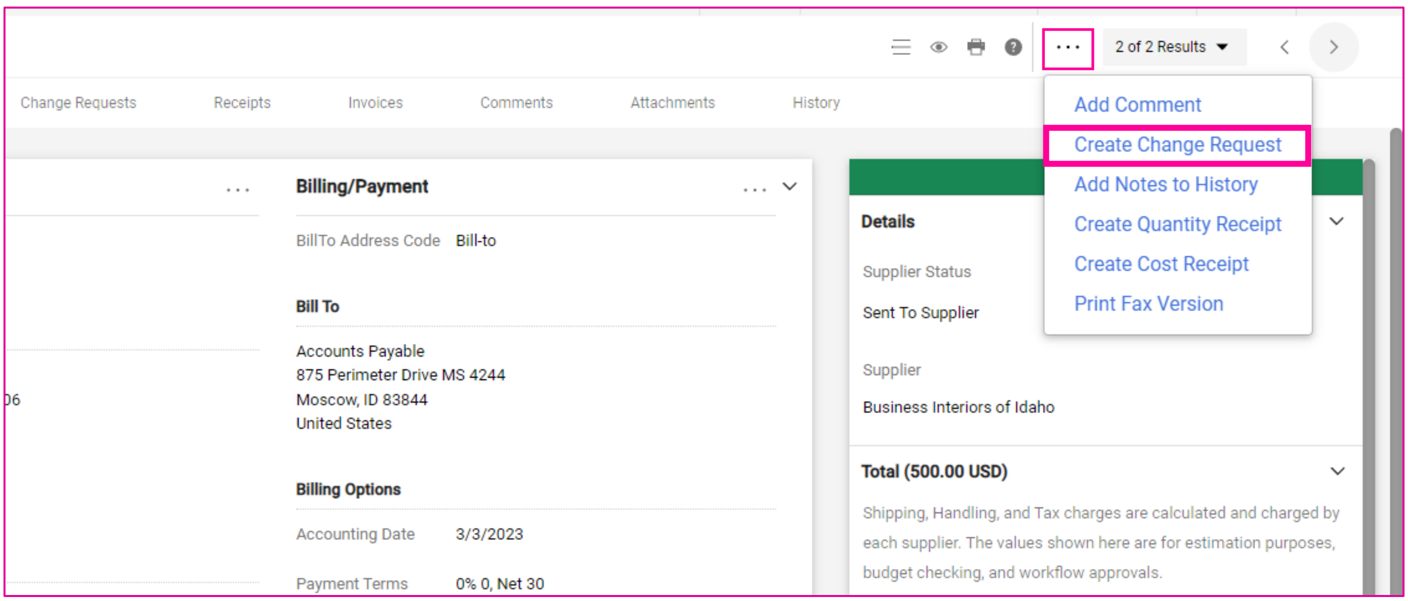
Most common case for changing an order owner is in the event that a person leaves or changes departments while orders are still pending – especially Blanket Orders.

If you need a PO Owner changed, please contact jaggaer@uidaho.edu.

Change Requests (Change Orders)

In most cases, it is more effective to Cancel and re-issue a Purchase Order. Change Requests can only be done with **Non-Catalog** orders. Contact your area's buyer or purchasing@uidaho.edu to determine what is the most effective way to handle your specific need.

To create a Change Order, open the Purchase Order and select the three dots in the upper right of the Purchase Order screen and select "**Create Change Request**".



On the next screen. . .

(Optional) select users who need to be notified of the change request.

Enter the Change Request Reason and (optional) attach relevant files.

Select "**Create Change Request**"

Make your requested changes on the Requisition screen.

eProcurement User Roles and Permissions

JAGGAER Role	Description	Common Job Titles
Shopper	Base user role for eProcurement Module. Allows users to add items to their cart before assigning a Requester for approval.	All Faculty and Staff, T1s (Automatically assigned)
Requester	Submit and edit carts before submitting.	Department Financial Staff.
Buyer	Approve/Return Requisitions.	Contracts and Purchasing Staff.

FLEX Address – Flexible Shipping address

The **FLEX** address in JAGGAER is designed for the purpose of shipping to a *non-standard address* on a one-off or limited basis. It is intended to be used when the U of I needs to deliver items to an address that does not have an established "ShipTo" code and the address does not require regular deliveries. The FLEX address provides a flexible solution for exceptional shipping situations, allowing for efficient delivery to unique locations.

For instructions on how to use the FLEX Address, please email jaggaer@uidaho.edu.

General Procurement Rules and Guidelines

For most up-to-date information, please review **APM Chapter 60: Purchasing Services**, or email purchasing@uidaho.edu.

Information provided in this section was accurate at the time of publication but may have been updated since. It is the responsibility of each staff member to be familiar with the current policy and procedures.

Amount	Description	Common Exceptions
$0+	(POs) Vendor must be active in Banner/JAGGAER	$0-$5k can be purchased using a U of I Purchasing Card.
$0 - $10k	Departments can issue a Purchase order to an active vendor without CPS Approval.	Vehicles, radioactive materials.
$10k +	Purchases must be competitively bid above $10k.	Bid Waiver Accepted, Contracted Vendor.

NSF (Non-Sufficient Funds) Workflows

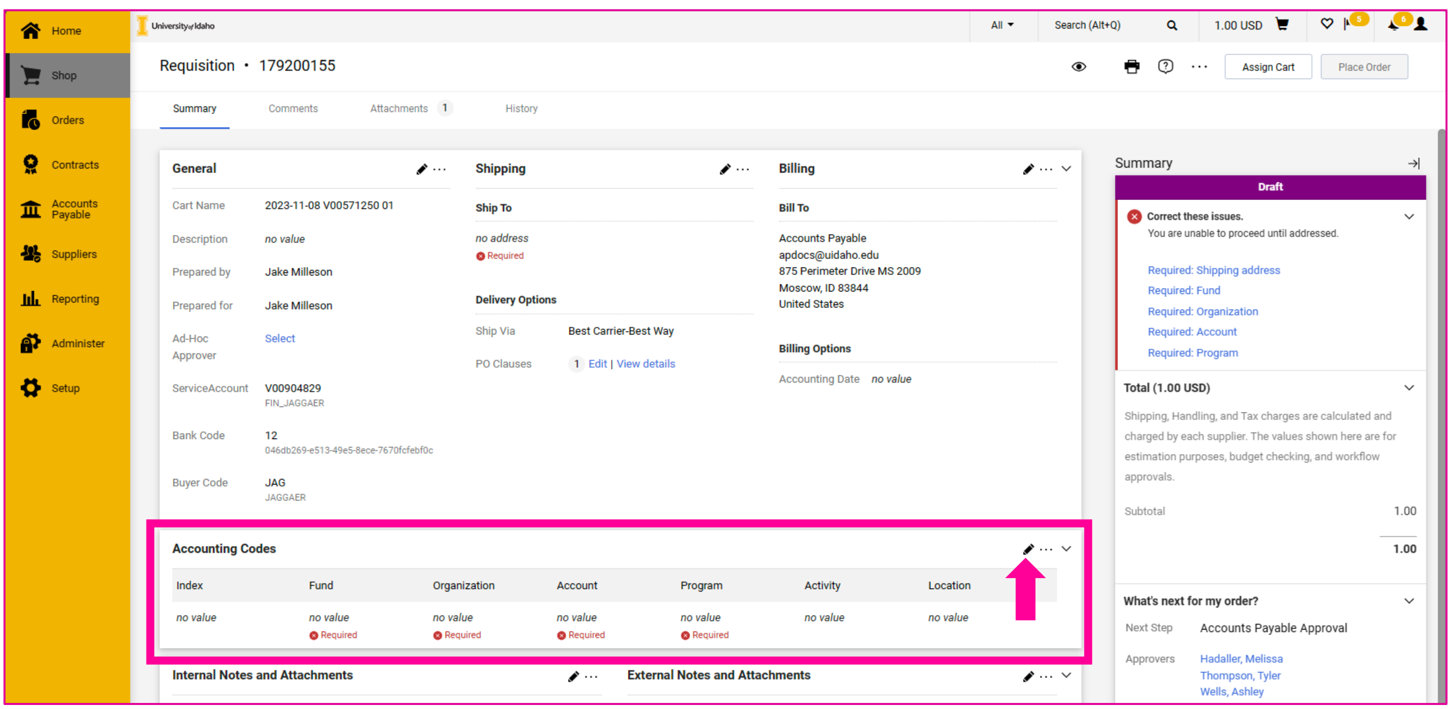
In the eProcurement module, NSF Review may be triggered in the following fund types:

FUND TYPES	APPROVER	FUND TYPES	APPROVER
Grant (22) Funds between "220000" and "22ZZZZ"	OSP	1R Funds between "1R0000" and "1RZZZZ"	Budget Office
		1S Funds between "1S0000" and "1SZZZZ"	
		10 Funds between "100000" and "10ZZZZ"	
		11 Funds between "110000" and "11ZZZZ"	
		24 Funds between "240000" and "24ZZZZ"	

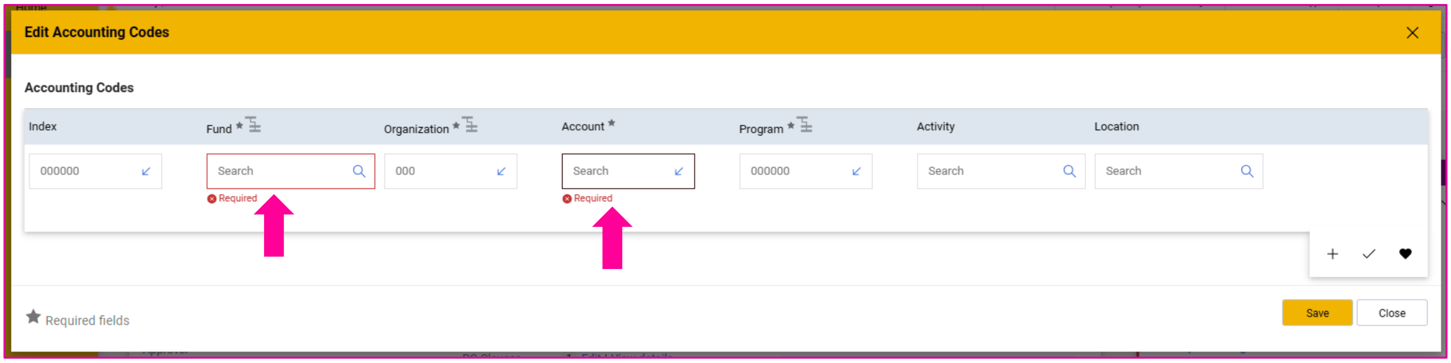
Posting to a General Ledger (GL) Account

We have now implemented a straightforward solution that allows departments to post exclusively to the fund and account combination of the FOAPAL.

On the Requisition screen, use the pencil icon to edit your accounting codes.



To post to only the fund and account combination (FOAPAL), simply enter "000000" in the "Index" field. Once you've entered "000000," the system will automatically default to a "000" organization code and a "000000" program code.



From there, you can easily update the fund and account code to match your specific needs.

If you find that you do not have a specific account code, please contact business systems at bus-sys@uidaho.edu to request it to be added to JAGGAER.

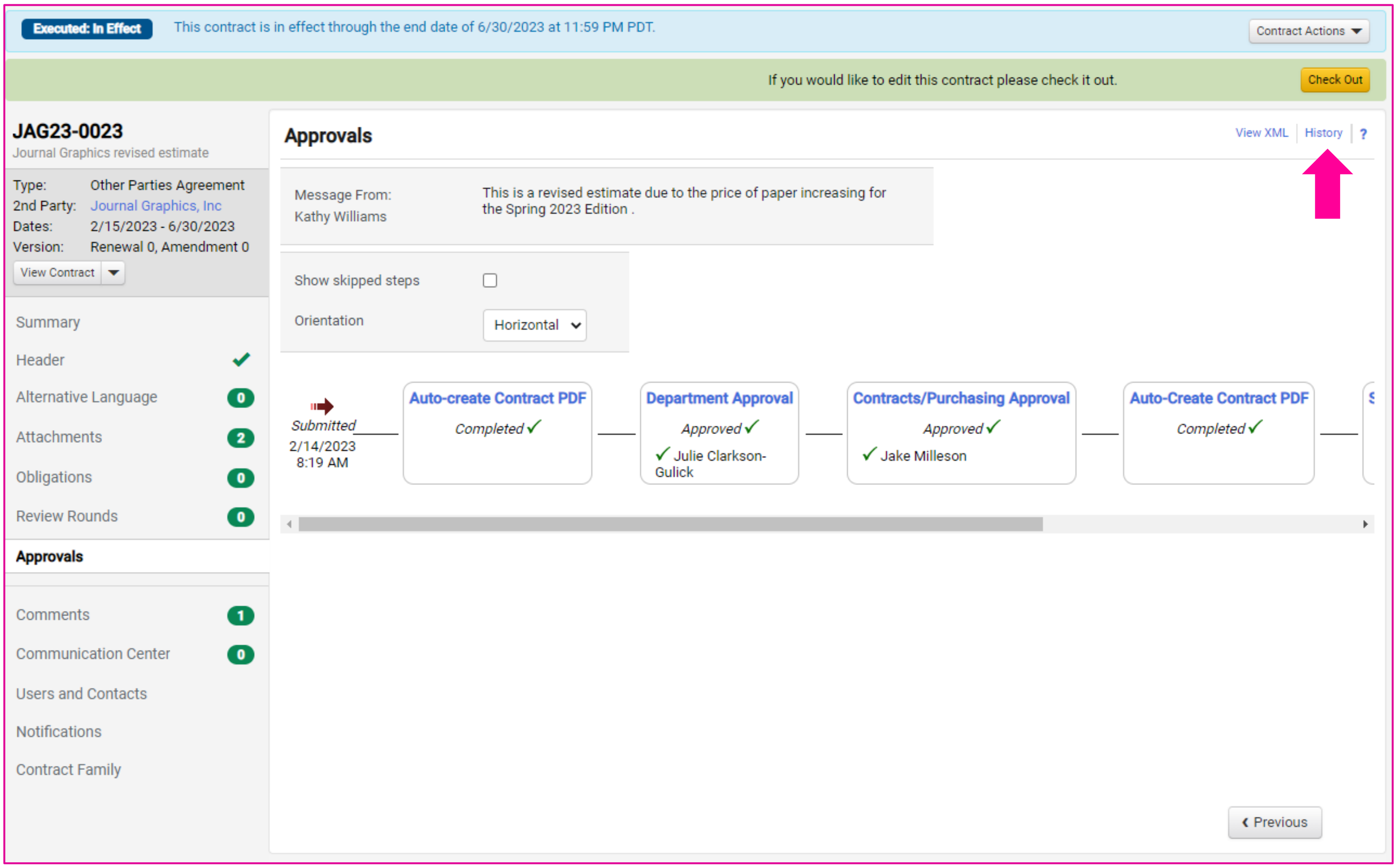
PunchOut Vendor Quotes

Occasionally, you may receive quotes for specialized/additionally discounted pricing from a PunchOut vendor. For vendors such as Fisher Scientific or VWR, you can add these items to your cart from the PunchOut by locating your quote from the "Quotes" section of the website. Contact jaggaer@uidaho.edu for current step-by-step guides.

For other PunchOut vendors, please contact jaggaer@uidaho.edu or your assigned Buyer for assistance in creating the order properly.

Detailed Approval History

From the Approval tab of a contract, you can view the detailed approval history by selecting **History** in the upper left corner. This opens a new window with the timestamp of approval actions taken.



Certificates of Insurance

Many types of contracted services need to have the University of Idaho listed as a certificate holder for the duration of the contract.

Contact Risk Management (risk@uidaho.edu) for guidance on if your contract will need a Certificate of Insurance or see the ***Service Agreement Matrix*** for guidance on common contract types and insurance requirements.

Contracting with individuals with only a V# (no GID)

If your individual has been onboarded as a vendor and is not showing in JAGGAER, please contact Accounts Payable and let them know you are not seeing them in JAGGAER.

U of I is unable to enter contracts with:

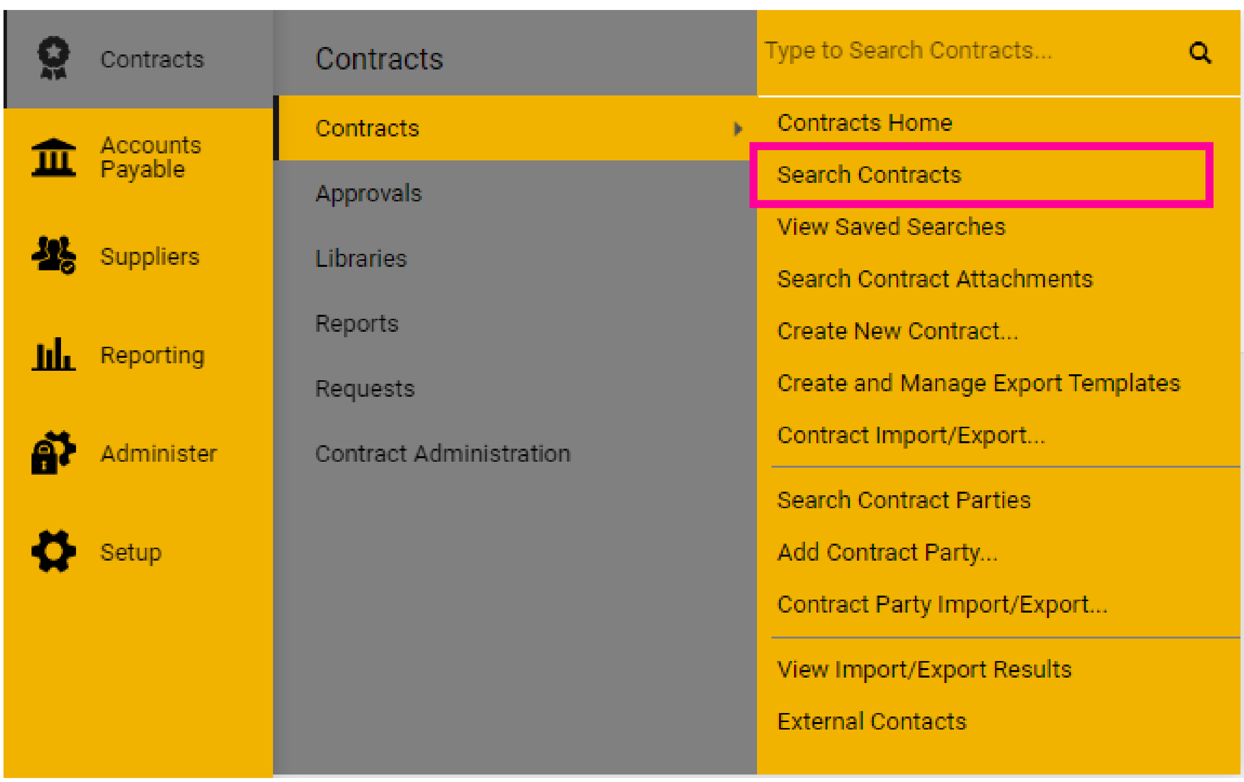
- Current Employees & Current Students – Contract HR with questions.
- Federally debarred businesses and organizations

Contracts+ User Roles and Permissions

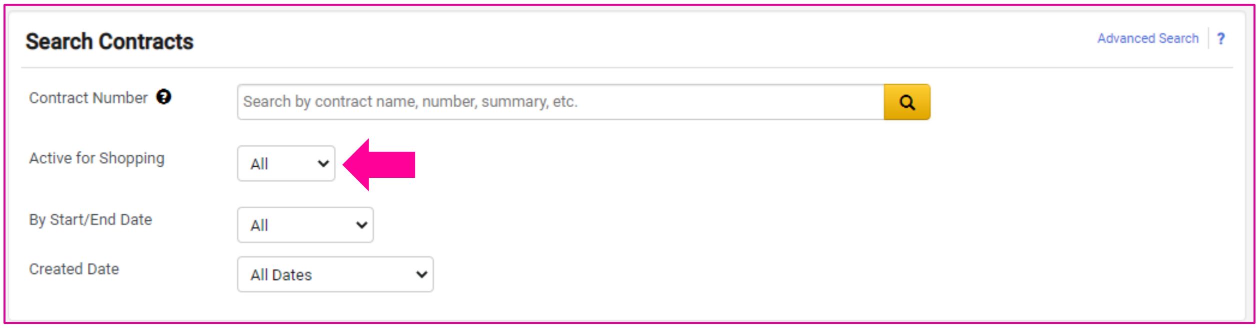
JAGGAER Role	Description	Common Job Titles
Contract Requester *COMING SOON*	Base user role for Contracts+ Module. Allows users to request a contract from a Requesting a Contract for Services. Contract must be approved by Contract Approver/Manager.	All Faculty and Staff, T1s
Contract Manager	Review and create contracts from contract request forms.	Department Financial Staff.
Contract Approver	Approves/Reviews of contracts via workflow	College/Division/Unit fiscal officers

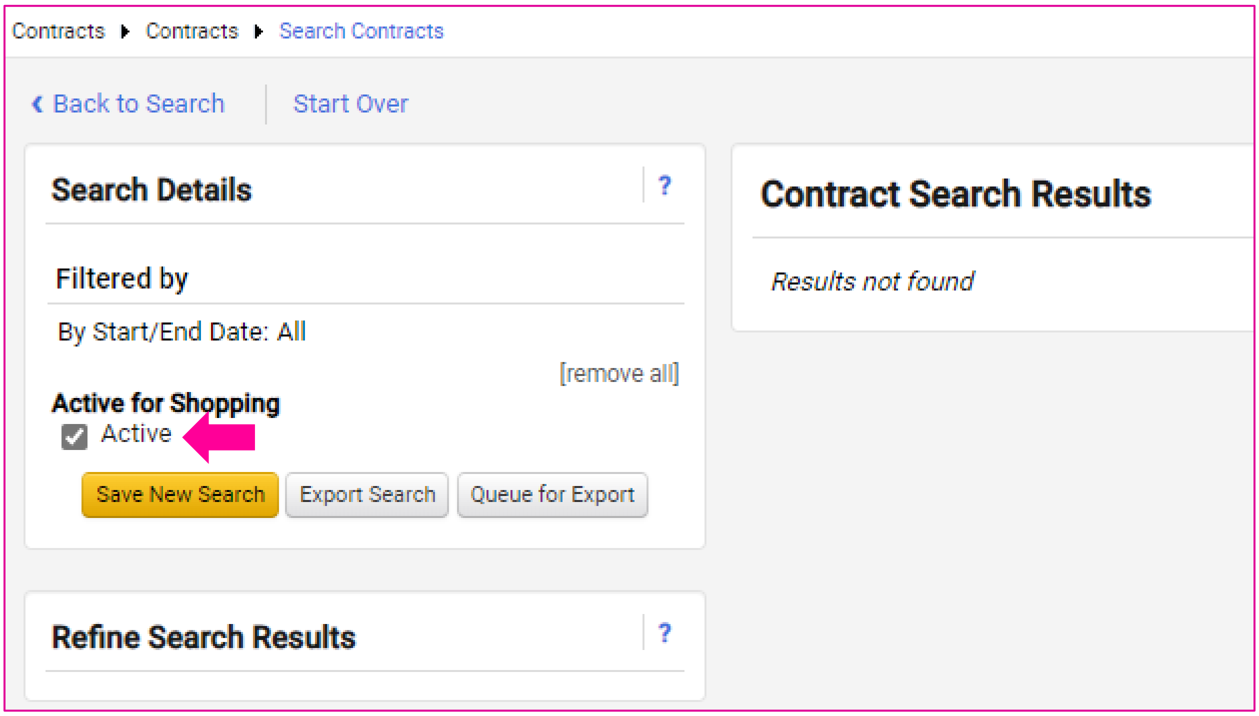
Contract search tips

You can search for a contract from the left-hand global navigation menu by going to **Contracts > Contracts > Search Contracts.**



When searching for a contract you will see an option for “**Active for Shopping**” this option should be set to “**All**” or **unchecked**.





!! IMPORTANT NOTE !! *If “Active for Shopping” is selected, you will not see any contract results.*

Service Agreement Matrix

For most up-to-date information, please review **APM Chapter 60: Purchasing Services**, or email purchasing@uidaho.edu.

Information provided in this section was accurate at the time of publication but may have been updated since. It is the responsibility of each staff member to be familiar with the current policy and procedures.

Contact Risk Management (risk@uidaho.edu) for guidance on if your contract will be considered a Trade or Non-Trade service and if a Certificate of Insurance (COI) will be required or to ask for a waiver of the requirement.

Non-trade services

e.g., speakers, DJs, photographers, piano tuners, etc.:

$1 - $999
U of I service agreement: Not required
Certificate of Insurance: Not required
Payment: Pcard or Claim Voucher (persons)/Payment Request (organizations)

$1,000+
U of I service agreement: Required
Certificate of Insurance: Not required
Payment: Claim Voucher (persons)/Payment Request (organizations)

Trade services

e.g., roofing, plumbing, window washing, etc.:

$1+
U of I service agreement: Required
Certificate of Insurance: Required
Payment: Payment Request

Banquet Event Orders (BEOs)

e.g., catering agreements

$1 to $5,000
U of I service agreement: Not required
Certificate of Insurance: Not required
Payment: Pcard or Payment Request
Note: Departments can sign BEOs and catering agreements up to $5,000

$5,000+
U of I service agreement: Not required
Certificate of Insurance: Not required
Payment: Payment Request
Note: Contracts & Purchasing Services must sign vendor's BEO and/or catering agreements

Signed Contracts: What to do next?

Have a signed contract but not sure what to do next? – Below is a general guide, if you have questions about a specific contract, please email purchasing@uidaho.edu and include the contract number.

Is the contract signed by both parties (U of I and vendor)?

YES – send copy to purchasing@uidaho.edu for upload into JAGGAER.
NO – see next question.

Is the contract signed by the vendor but not by U of I?

YES – send copy to purchasing@uidaho.edu for signature and upload into JAGGAER.
NO – see next question.

Is the contract signed by U of I but not by the vendor?

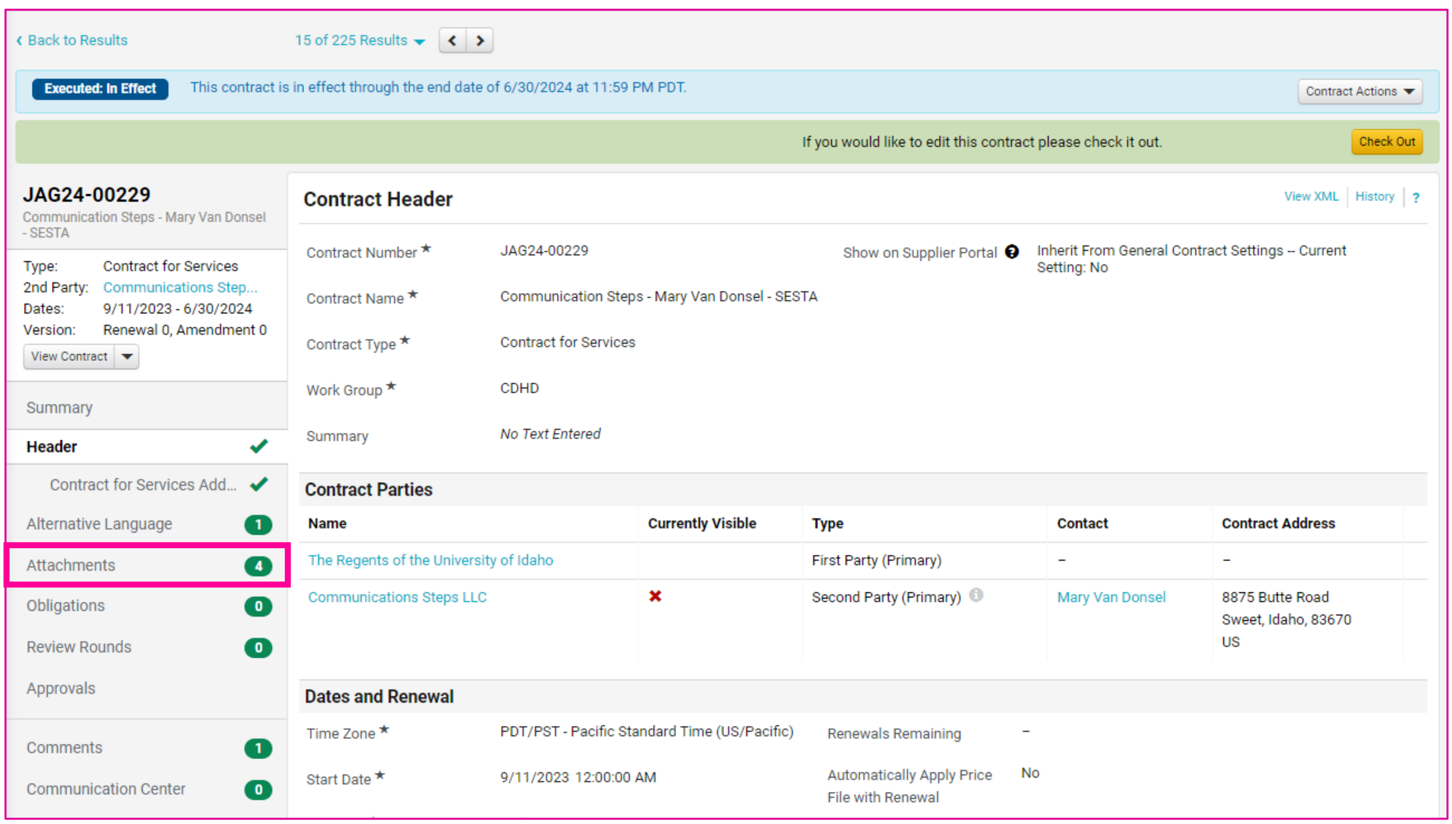
YES – send the contract to the vendor for signature.

Signed Contracts: Fully Executed Copy

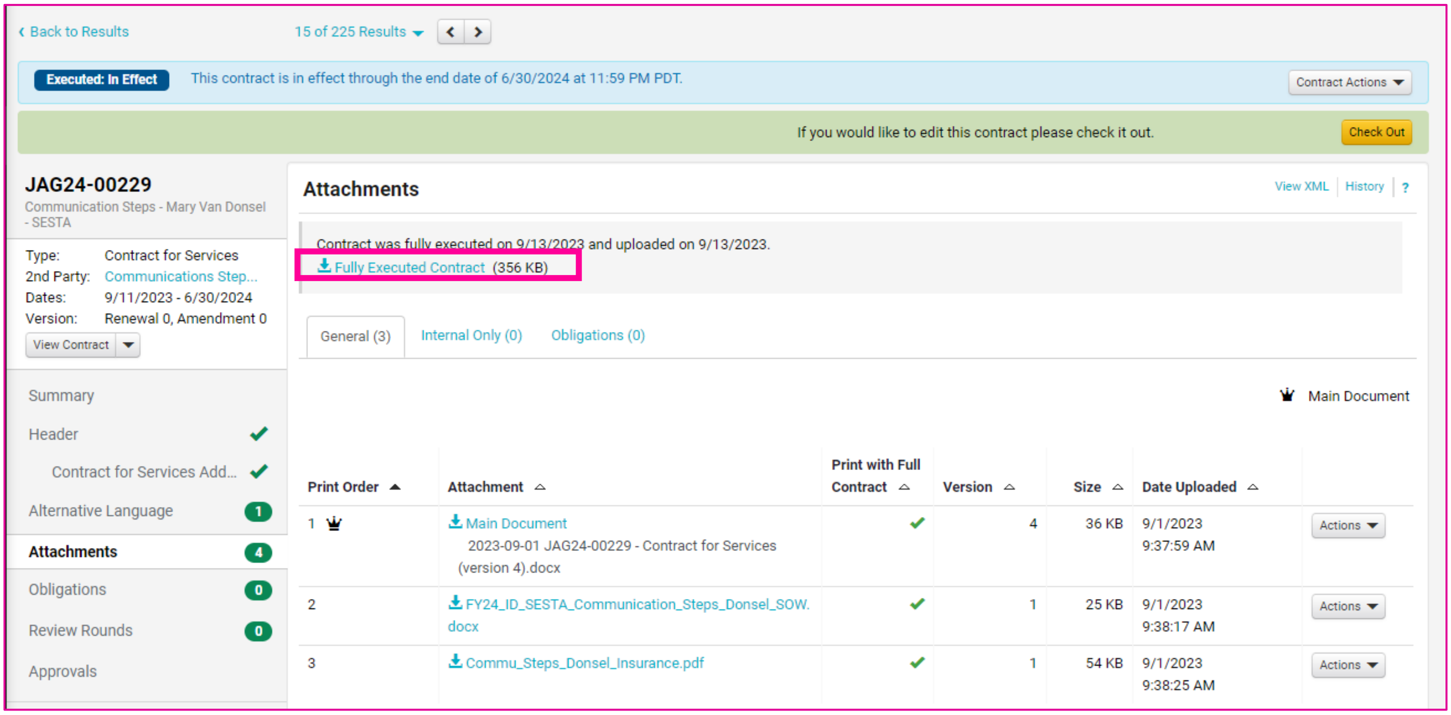
Once a contract has been fully executed by Contracts and Purchasing Services, you will receive an email from the system that notifies you that a contract has completed workflow and is executed. It is best practice to send a copy of the completed contract to the vendor for their records.

To download a fully executed copy of the contract, begin by opening the contract in JAGGAER Contracts+ module.

From the Contract Header, select "**Attachments**"



Once on the “**Attachments**” page, select “**Fully Executed Contract**” to download.



Help and JAGGAER User Support

University of Idaho

Support Contacts

We are here to help if you have issues using the JAGGAER system. Please see the matrix below to best direct your issue to the appropriate team/person:

To better support you please include User experiencing issues, JAGGAER document number, a description of the issue.

- **Questions/General Errors:** jaggaer@uidaho.edu
- **Requisition/PO Specific Workflow Questions or Errors:** Contact your area's buyer or purchasing@uidaho.edu.
- **Contract Questions:** purchasing@uidaho.edu or your area's buyer.
- **Accounts Payable / Invoices / Payment Request:** ap-staff@uidaho.edu