



University  
of Idaho

# JAGGAER USER MANUAL

JAGGAER 

## Welcome to JAGGAER!

# 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](mailto: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.***

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# Section 1: Getting Started

# Logging in

To log into the JAGGAER system, launch the application from the “[Launch Enterprise Applications](#)” page on [support.uidaho.edu](http://support.uidaho.edu).

The screenshot displays the University of Idaho's "Launch Enterprise Applications" page. At the top, there is a navigation bar with the University of Idaho logo, a search bar, and the user name "Jake Milleson". Below the navigation bar, there are several tabs: "Home", "Information Technology", "Projects", "Services", and "Knowledge Base". The main content area is titled "Launch Enterprise Applications" and includes a breadcrumb trail: "Service Catalog > General > Launch Enterprise Applications".

The page is divided into two main sections of application tiles:

- Banner Applications:** This section contains four tiles: "Banner 9 Supplemental Forms", "VandalWeb Student & Staff Portal", "Evisions Argos, Form Fusion, Intellectcheck", and "Workflow Banner Workflow Client".
- Enterprise Administrative Applications:** This section contains a grid of tiles including "CS Gold VandalCard AdminWeb", "ORACLE Doc Imaging Stellant, Capture", "PEOPLEADMIN PeopleAdmin Job Applicant Review", "Sitecore Content Management System", "TouchNet Marketplace Admin", "CHROME RIVER Chrome River Travel System", "25Live Conference Room Scheduling", "University of Idaho IVandal International Programs", "PaymentWorks Supplier Registration", and "JAGGAER E-Procurement System". The "JAGGAER" tile is highlighted with a red rectangular box.

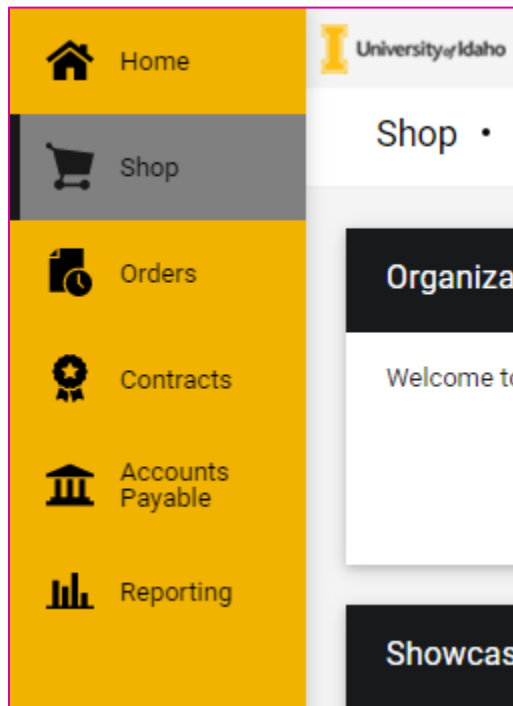
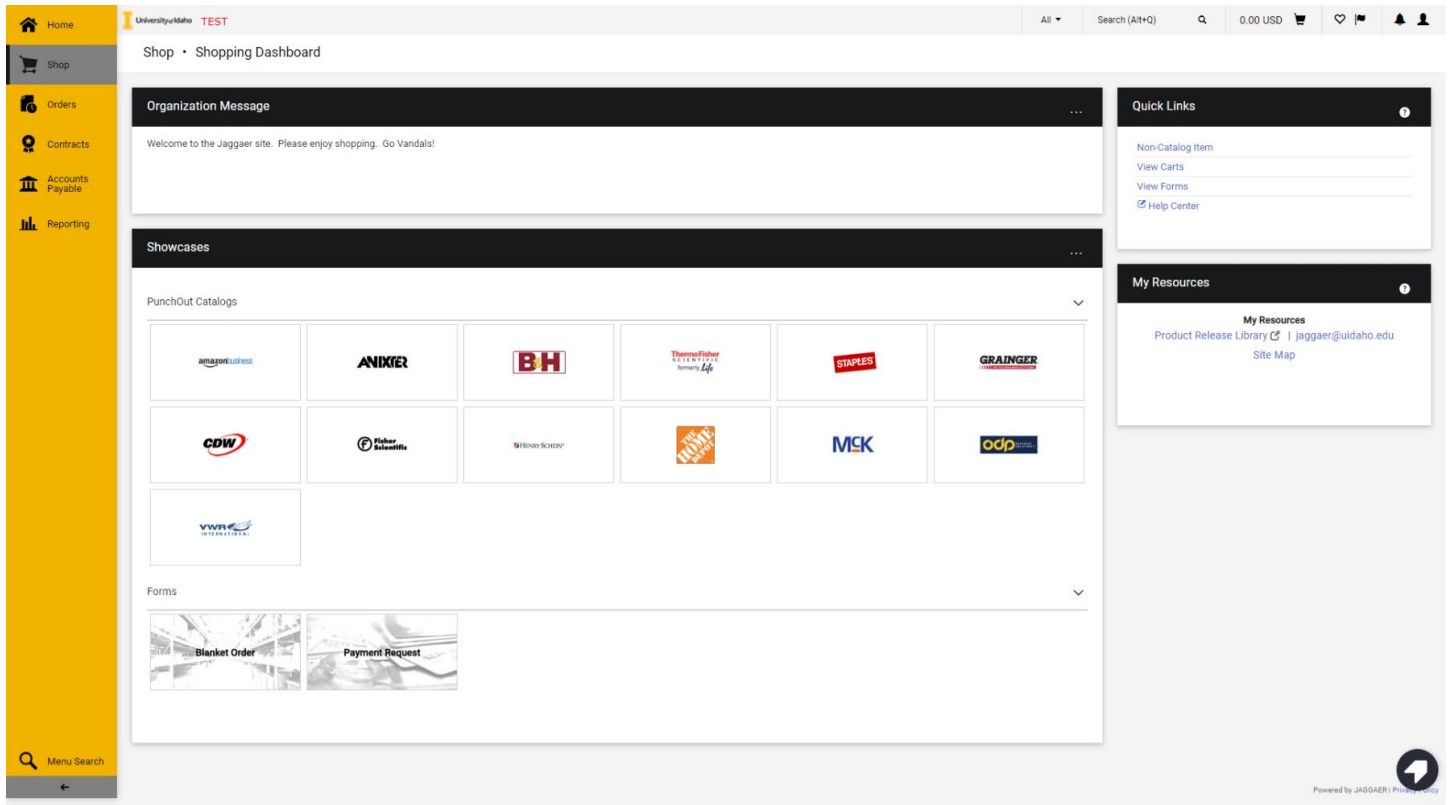
On the right side of the page, there are several utility buttons and a details panel:

- "Share" button (yellow)
- "Add to Favorites" button (yellow)
- "Details" panel showing: Service ID: 707, Created: Fri 3/9/18 8:04 AM, Modified: Fri 4/7/23 4:33 PM
- "Attachments (0)" panel showing: No files found

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

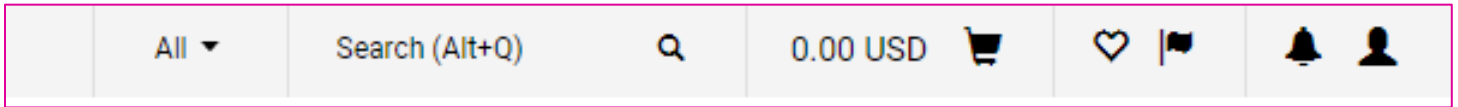
On the left you will see the left-hand **global menu**. This houses the different modules JAGGAER has. Depending on your assigned roles, you may see additional modules. Standard modules include:

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.



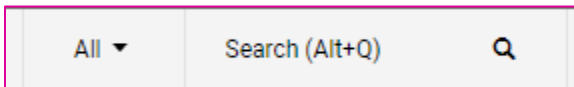
## Action Bar

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.



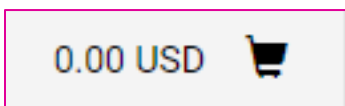
## Search Bar

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.



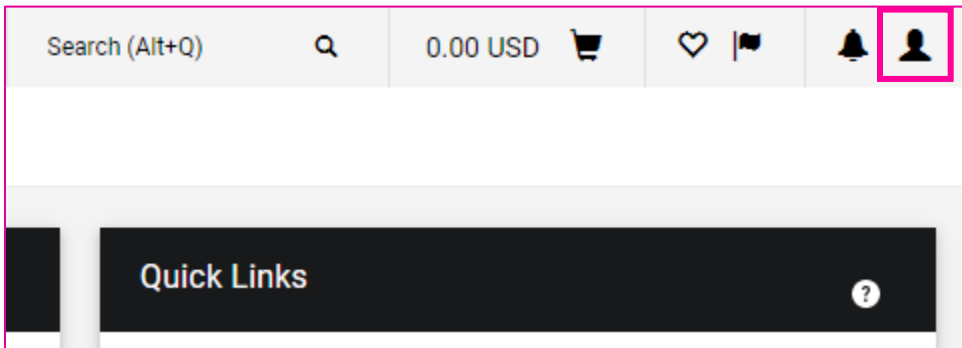
## Profile

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

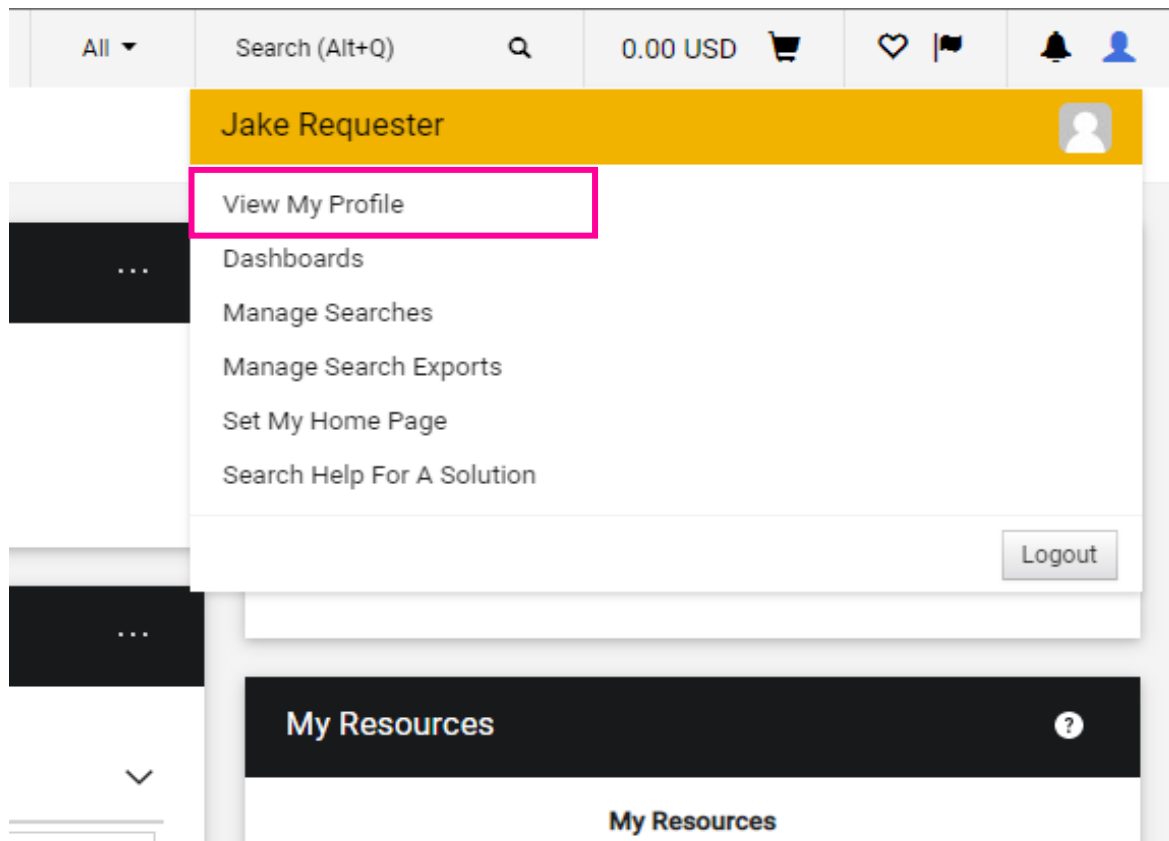


## JAGGAER User Profile and Default Settings

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.

University of Idaho TEST

My Profile > User's Name, Phone Number, Email, etc.

**Jake Requester**

User Name JakeRequester

User Profile and Preferences <

User's Name, Phone Number, Email, etc. (highlighted)

Language, Time Zone and Display Settings

Early Access Participation

Update Security Settings >

**Default User Settings >** (highlighted)

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

**User's Name, Phone Number, Email, etc.**

First Name Jake

Last Name Requester

Phone Number ext. International phone numbers must begin with +

Mobile Phone Number International phone numbers must begin with +

E-mail Address \* jacobmilleson@uidaho.edu

Department -

Position -

Authentication Method Local

User Name \* JakeRequester

★ Required

Save Changes

## 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.*

University of Idaho TEST

My Profile > User's Name, Phone Number, Email, etc.

**Jake Requester**

User Name JakeRequester

User Profile and Preferences <

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

Early Access Participation

Update Security Settings >

Default User Settings >

Custom Field and Accounting Code Defaults

**Default Addresses >** (highlighted)

Financial Approvers

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

**User's Name, Phone Number, Email, etc.**

First Name Jake

Last Name Requester

Phone Number ext. International phone numbers must begin with +

Mobile Phone Number International phone numbers must begin with +

E-mail Address \* jacobmilleson@uidaho.edu

Department -

Position -

Authentication Method Local

User Name \* JakeRequester

★ Required

Save Changes

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

The screenshot shows the user profile page for Jake Requester. The left sidebar contains navigation options such as 'User Profile and Preferences', 'Update Security Settings', 'Default User Settings', 'Default Addresses', 'Financial Approvers', 'User Roles and Access', 'Ordering and Approval Settings', 'Permission Settings', 'Notification Preferences', 'User History', and 'Administrative Tasks'. The 'Default Addresses' section is active, displaying a message: 'No addresses defined in profile.' Below this, there are tabs for 'Ship To' and 'Bill To'. A dropdown menu is open under 'Ship To', showing the same 'No addresses defined in profile.' message and a button labeled 'Select Addresses for Profile' which is highlighted with a pink box. A 'Shipping Addresses' list is also visible below the dropdown.

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.

The screenshot displays the JAGGAER user interface for 'Jake Requester'. On the left is a navigation sidebar with icons and menu items such as 'User Profile and Preferences', 'Update Security Settings', 'Default User Settings', 'Default Addresses', 'Financial Approvers', 'User Roles and Access', 'Ordering and Approval Settings', 'Permission Settings', 'Notification Preferences', 'User History', and 'Administrative Tasks'. The main content area is titled 'Default Addresses' and contains a message: 'No addresses defined in profile.' Below this, there are tabs for 'Ship To' and 'Bill To'. Under the 'Ship To' tab, there is a 'Select an address to edit' section with another 'No addresses defined in profile.' message and a 'Select Addresses for Profile' button. A 'Shipping Addresses' list is empty. To the right of the list is an 'Address Search' section with a text input field containing 'Moscow', a 'Results Per Page' dropdown set to '10', and a 'Search' button. A pink rectangular box highlights the search input field, and a pink arrow points to the 'Search' button.

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](mailto:jaggaer@uidaho.edu).

The screenshot shows the Banner system interface for a user named 'TEST'. The left sidebar contains navigation icons and a menu with options like 'Financial Approvers', 'User Roles and Access', etc. The main content area is divided into three sections: 'Shipping Addresses' (empty), 'Address Search', and a results table. The 'Address Search' section has a search box containing 'Moscow' and a 'Search' button. Below it, a table lists 8 addresses found, with 'Main Campus' selected and highlighted by a pink box.

Name	Address
<input type="radio"/> CDHD Alturas	University of Idaho Attn: Jake Requester 1187 Alturas Drive Moscow, ID 83843 United States
<input type="radio"/> Forest Research Nursery 83843B	Attn: Jake Requester Bldg/Rm: Mailstop: Troy Highway (Idaho 8) Moscow, ID 83843 United States
<input type="radio"/> Forest Research Nursery 83843C	Attn: Jake Requester Bldg/Rm: Mailstop: Troy Highway (Idaho 8) Moscow, ID 83843 United States
<input type="radio"/> Idaho Ctr. on Dev. Disability	Attn: Jake Requester Bldg/Rm: Mailstop: 129 West Third Moscow, ID 83843 United States
<input checked="" type="radio"/> Main Campus	Attn: Jake Requester Bldg/Rm: Mailstop: 875 Perimeter Dr. Moscow, ID 83844 United States
<input type="radio"/> Parker Farm Nursery	Attn: Jake Requester Bldg/Rm: Mailstop: Highway 8 East (Troy Hwy) Moscow, ID 83843 United States
<input type="radio"/> Postharvest Institute	Attn: Jake Requester Bldg/Rm: Mailstop: 129 W Third St Moscow, ID 83843 United States
<input type="radio"/> WWAMI Gritman Center	Attn: Jake Requester Bldg/Rm: 803 South Main Moscow, ID 83843 United States

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.

The screenshot displays the 'Default Addresses' page for a user named 'Jake Requester'. The page is divided into a left sidebar with navigation options and a main content area. The main content area shows a 'Default Addresses' section with a message: 'No addresses defined in profile.' Below this, there are two tabs: 'Ship To' and 'Bill To'. The 'Ship To' tab is active, and it contains a 'Shipping Addresses' section. A 'Shipping Address' is selected, and the 'Edit Selected Address' form is displayed. The form includes the following fields:

- Nickname: Main Campus
- Default:
- Current Default Address: ---
- ADDRESS
- Attn: \* Jake Requester
- Bldg/Rm: \*
- Mailstop: \*
- Address Line 1: 875 Perimeter Dr.
- City: Moscow
- State: ID
- Zip Code: 83844
- Country: United States

A pink arrow points to the 'Save' button at the bottom of the form.

# 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](#))

University of Idaho TEST

My Profile > User's Name, Phone Number, Email, etc.

**Jake Requester**

User Name JakeRequester

User Profile and Preferences <

User's Name, Phone Number, Email, etc. (highlighted)

Language, Time Zone and Display Settings

Early Access Participation

Update Security Settings >

**Default User Settings >** (highlighted)

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

**User's Name, Phone Number, Email, etc.**

First Name Jake

Last Name Requester

Phone Number ext.

Mobile Phone Number

E-mail Address \* jacobmilleson@uidaho.edu

Department -

Position -

Authentication Method Local

User Name \* JakeRequester

★ Required

Save Changes

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

University of Idaho TEST

My Profile > User's Name, Phone Number, Email, etc.

**Jake Requester**

User Name JakeRequester

User Profile and Preferences <

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

Early Access Participation

Update Security Settings >

Default User Settings <

**Custom Field and Accounting Code Defaults** (highlighted)

Default Addresses

Financial Approvers

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

**User's Name, Phone Number, Email, etc.**

First Name Jake

Last Name Requester

Phone Number ext.

Mobile Phone Number

E-mail Address \* jacobmilleson@uidaho.edu

Department -

Position -

Authentication Method Local

User Name \* JakeRequester

★ Required

Save Changes



Select the “Codes” tab.

University of Idaho TEST

My Profile > Custom Field and Accounting Code Defaults

**Jake Milleson**  
User Name V00571250

User Profile and Preferences >  
Default User Settings <  
**Custom Field and Accounting Code Defaults**  
Default Addresses  
Cart Assignees  
Financial Approvers  
Payment Options  
User Roles and Access >  
Ordering and Approval Settings >  
Permission Settings >  
Notification Preferences >  
User History >  
Administrative Tasks >

**Custom Field and Accounting Code Defaults** ?

Header (int.) **Codes** Code Favorites Internal Information

Custom Field Name	Default Value	Description	Edit Values
ServiceAccount	V00904829	FIN_JAGGAER	Edit
Buyer Code	JAG	JAGGAER	Edit
POGUID	No Default Value		Edit
Bank Code	12	046db269-e513-49e5-8ece-7670fcfeb0c	Edit
Final Payment	No Default Value		Edit

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.

University of Idaho TEST

My Profile > Custom Field and Accounting Code Defaults

**Jake Requester**  
User Name JakeRequester

User Profile and Preferences >  
Update Security Settings >  
Default User Settings <  
**Custom Field and Accounting Code Defaults**  
Default Addresses  
Financial Approvers  
User Roles and Access >  
Ordering and Approval Settings >  
Permission Settings >  
Notification Preferences >  
User History >  
Administrative Tasks >

**Custom Field and Accounting Code Defaults** ?

Header (int.) **Codes** Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Account	No Default Value		Edit
Activity	No Default Value		Edit
Location	No Default Value		Edit
Index	No Default Value		Edit
└ Fund	No Default Value		Edit
└ Organization	No Default Value		Edit
└ Program	No Default Value		Edit

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.*

The screenshot shows the 'Custom Field and Accounting Code Defaults' page for user Jake Requester. The page has a sidebar with navigation options and a main content area. In the main content area, there is a table with columns: Custom Field Name, Default Value, Description, and Edit Values. The first row is 'Index' with 'No Default Value' and an 'Edit' button. Below the table, there is a 'Create New Value' button highlighted with a pink arrow. A 'Search For Value' dialog box is also visible, with the 'Value' field containing '123456' and a 'Search' button highlighted with a pink arrow.

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

The screenshot shows the 'Custom Field and Accounting Code Defaults' page for user Jake Requester. The page has a sidebar with navigation options and a main content area. In the main content area, there is a table with columns: Custom Field Name, Default Value, Description, and Edit Values. The first row is 'Index' with 'No Default Value' and an 'Edit' button. Below the table, there is a 'Create New Value' button. A 'Search For Value' dialog box is open, with the 'Value' field containing '123456' and a 'Search' button highlighted with a pink arrow.

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

The screenshot shows the 'Custom Field and Accounting Code Defaults' page for user 'Jake Requester'. The 'Edit Values' dialog is open, displaying a search result for the value '638999' with the description 'Purchasing Gen Ed'. The 'Add Values' button is highlighted with a pink box. The dialog also includes a 'Create New Value' button and a 'Close' button. A search bar is visible with the field name 'Index' and the value '638999' entered.

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

The screenshot shows the 'Custom Field and Accounting Code Defaults' page for user 'Jake Requester'. The 'Edit Values' dialog is open, displaying a search bar with the field name 'Index' and the value '638999' entered. The search result for '638999 Purchasing Gen Ed' is highlighted with a pink box. The dialog also includes a 'Create New Value' button and a 'Close' button. A search bar is visible with the field name 'Index' and the value '638999' entered.

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

The screenshot shows the 'Custom Field and Accounting Code Defaults' page for user Jake Requester. The 'Edit Existing Value' dialog box is open, showing the following fields:

Value	Description
638999	Purchasing Gen Ed

The 'Default' checkbox is checked, and a pink arrow points to the 'Save' button.

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

The screenshot shows the 'Custom Field and Accounting Code Defaults' page for user Jake Requester. The 'Edit Existing Value' dialog box is open, showing the following fields:

Value	Description
638999	Purchasing Gen Ed

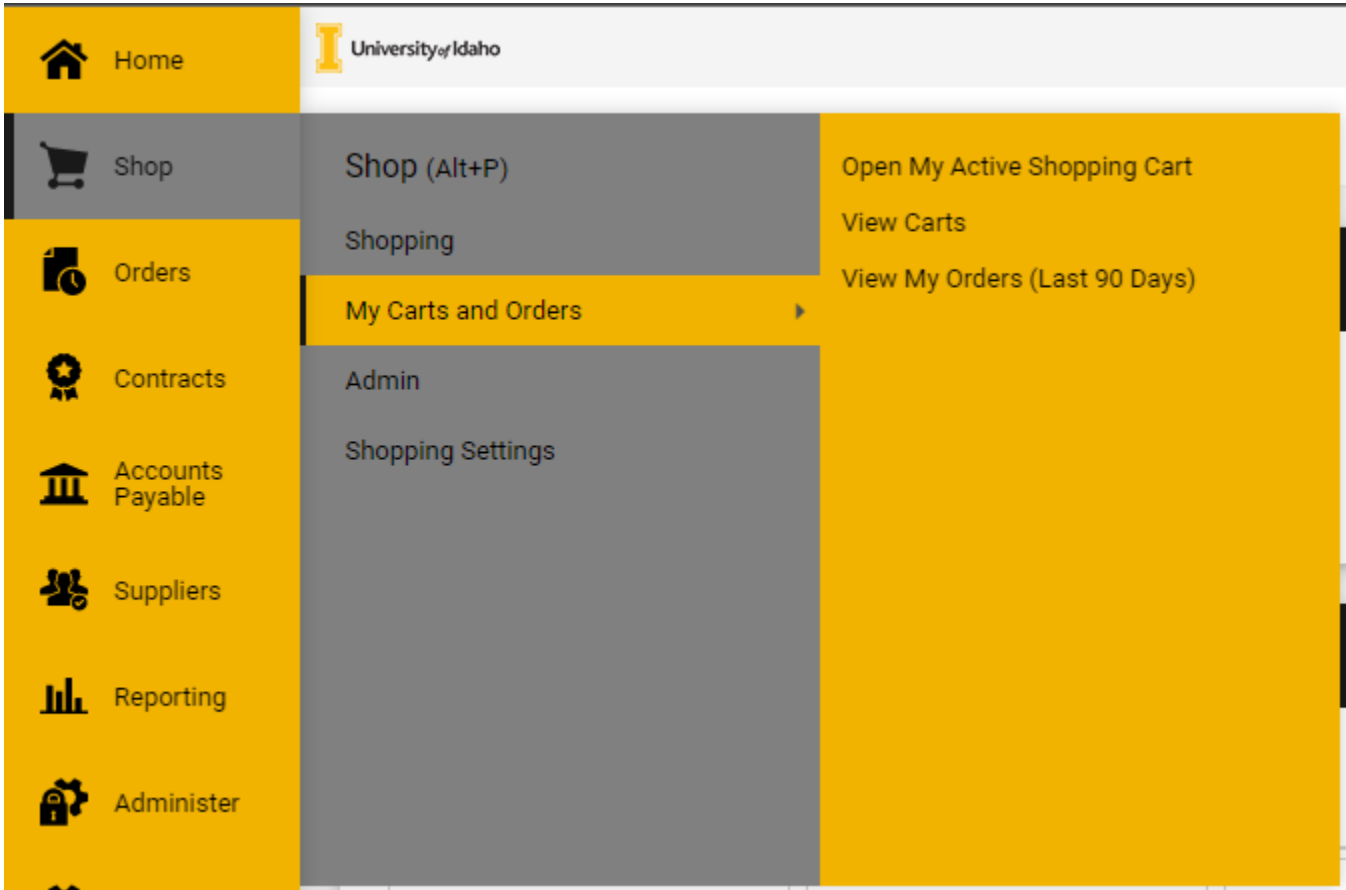
The 'Default' checkbox is checked, and a pink arrow points to the 'Close' button.

## 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.

The screenshot displays the 'Cart Management' interface. At the top, there are navigation tabs for 'Draft Carts' and 'Assigned Carts'. Below the tabs, there is a 'Filter Draft Carts' section and a table of results. The table has columns for 'Type', 'Shopping Cart Name', 'Cart Description', 'Date Created', 'Total', and 'Action'. The table contains six rows of data, each with a 'View' button in the 'Action' column. The first row is highlighted in blue.

Type	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	Amazon Test Cart		1/17/2023	8.23 USD	View
Normal	2023-01-18 V00571250 01		1/18/2023	0.00 USD	View
Normal	2023-01-31 V00571250 04		1/31/2023	4.81 USD	View
Normal - Returned	2023-02-01 V00571250 04		2/1/2023	589.00 USD	View
Normal - Returned	2023-02-07 V00571250 01		2/7/2023	1,001.44 USD	View
Normal	2023-02-13 V00571250 01		2/13/2023	0.00 USD	View

# 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.

The screenshot shows the 'Cart Assignees' page for a user named Sally Shopper. On the left is a navigation menu with 'Cart Assignees' selected. The main content area has a header 'Cart Assignees' and a button 'Add Assignee...' which is highlighted with a pink arrow. Below this is a table titled 'My Cart Assignees' with columns 'Name' and 'Action'.

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.

This is a close-up of the 'My Cart Assignees' table. It shows two rows of assignees: Jake Milleson and Cody Williams. Each row has two buttons in the 'Action' column: 'Set as Preferred' and 'Remove'. The 'Set as Preferred' button for Cody Williams is highlighted with a pink box.

Name	Action
Jake Milleson	<a href="#">Set as Preferred</a> <a href="#">Remove</a>
Cody Williams	<a href="#">Set as Preferred</a> <a href="#">Remove</a>

# Section 2: eProcurement



# 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 through one set of streamlined approvals.
- All orders begin as Requisitions.
  - Orders, regardless of dollar amount will begin as requisitions 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 eProcurement 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.

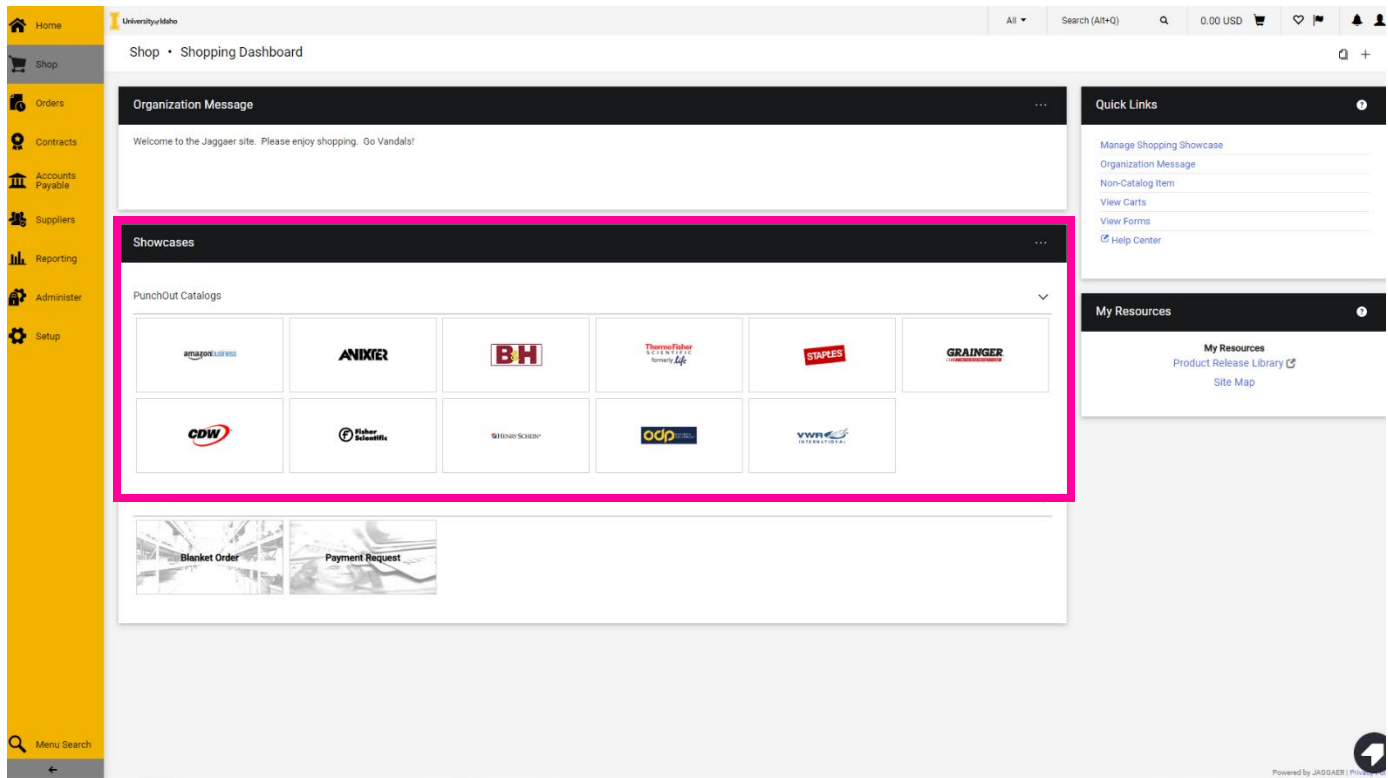
# Placing a PunchOut Order

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.

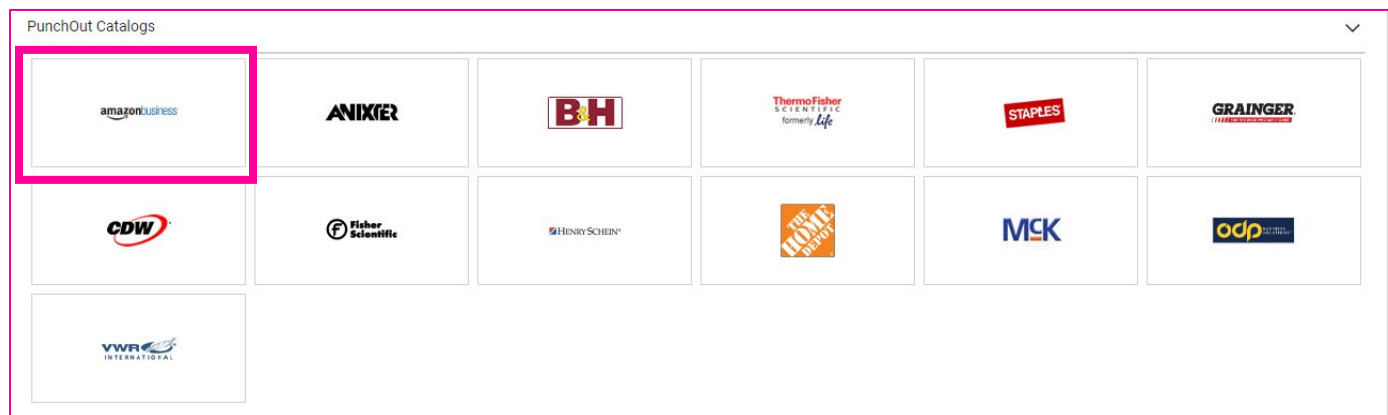
## Example Amazon Business Order

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](mailto:purchasing@uidaho.edu).

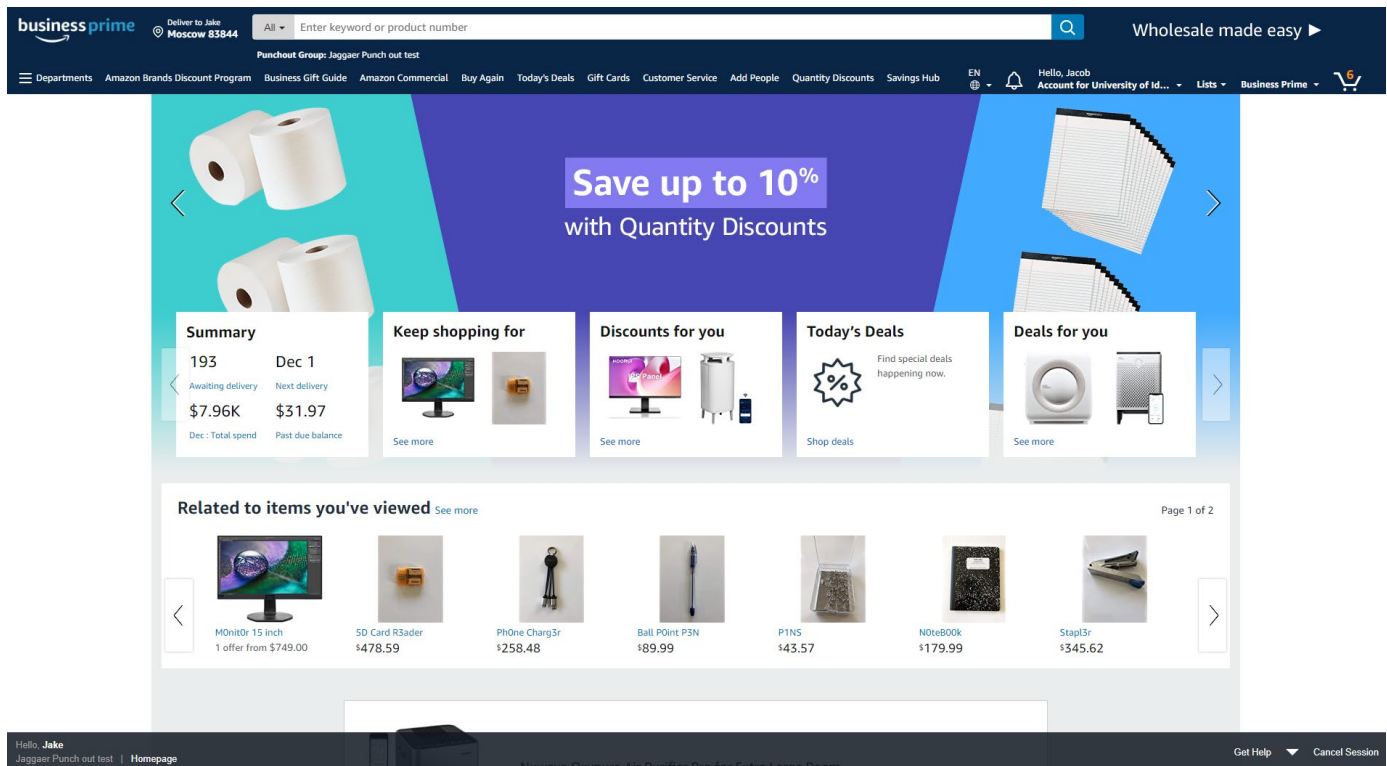


Select the **Amazon Business** tile to begin the PunchOut.

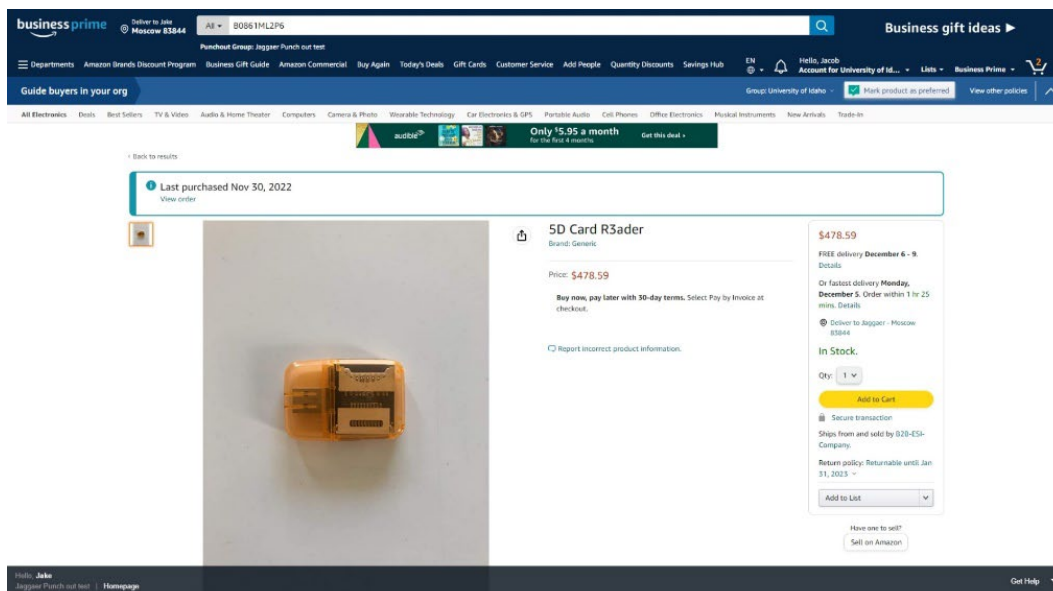


Selecting the tile will open Amazon Business in a new tab or window. Some PunchOuts will open in the current tab. You may need to enable pop-ups from JAGGAER.

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.

**amazon.com** [SIGN IN](#) [SHIPPING & PAYMENT](#) [GIFT OPTIONS](#) [PLACE ORDER](#)

## Review your order

 This order requires approval.

 There are 2 important messages about your order.  
▶ If your hours ever change at an address, click [Edit delivery preferen...](#)  
▶ If tax exemption is applied to this order, you acknowledge your tax exemption...

**Group** [Payment method Change](#) [Promotional Codes:](#)


Jaggaer Punch out test (University of Idaho)

[Change](#)

**Shipping address** [Change](#)

Attn: Jake Milleson, Bldg/Rm: Shoup  
Hall 324, Mail  
875 Perimeter Dr.  
Moscow, ID 83844  
United States  
Phone:  
[Ship to multiple addresses](#)


**Estimated delivery: Dec. 6, 2022 - Dec. 9, 2022**

 **M0nit0r 15 inch**  
**\$749.00**  
Not eligible for Amazon Prime ([Learn more](#))  
Quantity: 2 [Change](#)  
Sold by: B2B-ESI-Company  
  
Tax Exemption Applied.

**Tuesday, Dec. 6 - Friday, Dec. 9**  
FREE Shipping

**Friday, Dec. 2 - Wednesday, Dec. 7**  
\$54.53 - Shipping

**Tuesday, Dec. 6**  
\$56.53 - Shipping

 **SD Card R3ader**  
**\$478.59**  
Not eligible for Amazon Prime ([Learn more](#))  
Quantity: 4 [Change](#)  
Sold by: B2B-ESI-Company  
Gift options not available.  
Tax Exemption Applied.

**Order Summary**

Items (6):	\$3,412.36
Shipping & handling:	\$0.00
Total before tax:	\$3,412.36
Estimated tax to be collected:*	\$0.00
<b>Order total:</b>	<b>\$3,412.36</b>

[How are shipping costs calculated?](#)  
[Why didn't I qualify for Prime Shipping?](#)

\*Why has sales tax been applied? [See tax and seller information](#)

Do you need help? Explore our [Help pages](#) or [contact us](#)

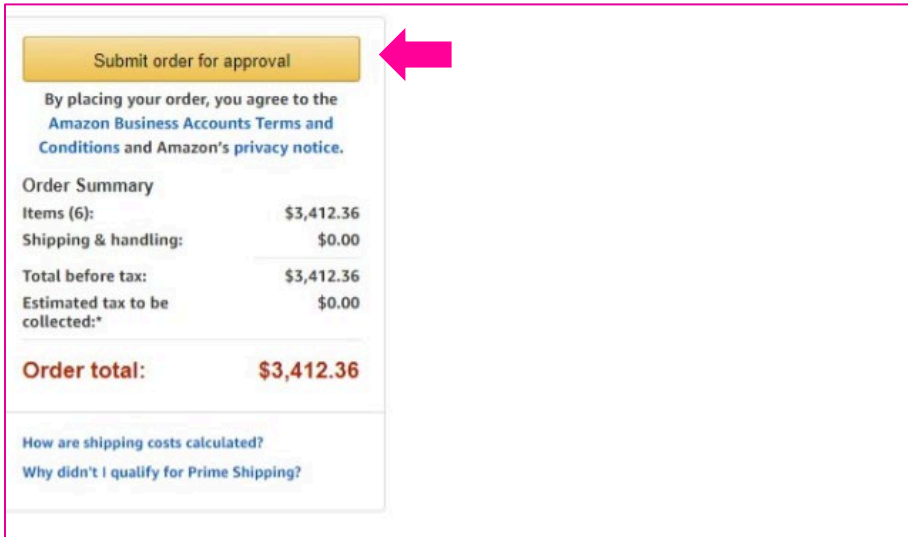
For an item sold by Amazon.com: When you click the "Place your order" button, we'll send you an email message acknowledging receipt of your order. Your contract to purchase an item will not be complete until we send you an email notifying you that the item has been shipped.

Colorado, Louisiana and Puerto Rico Purchasers: [important information regarding sales tax you may owe in your State](#)

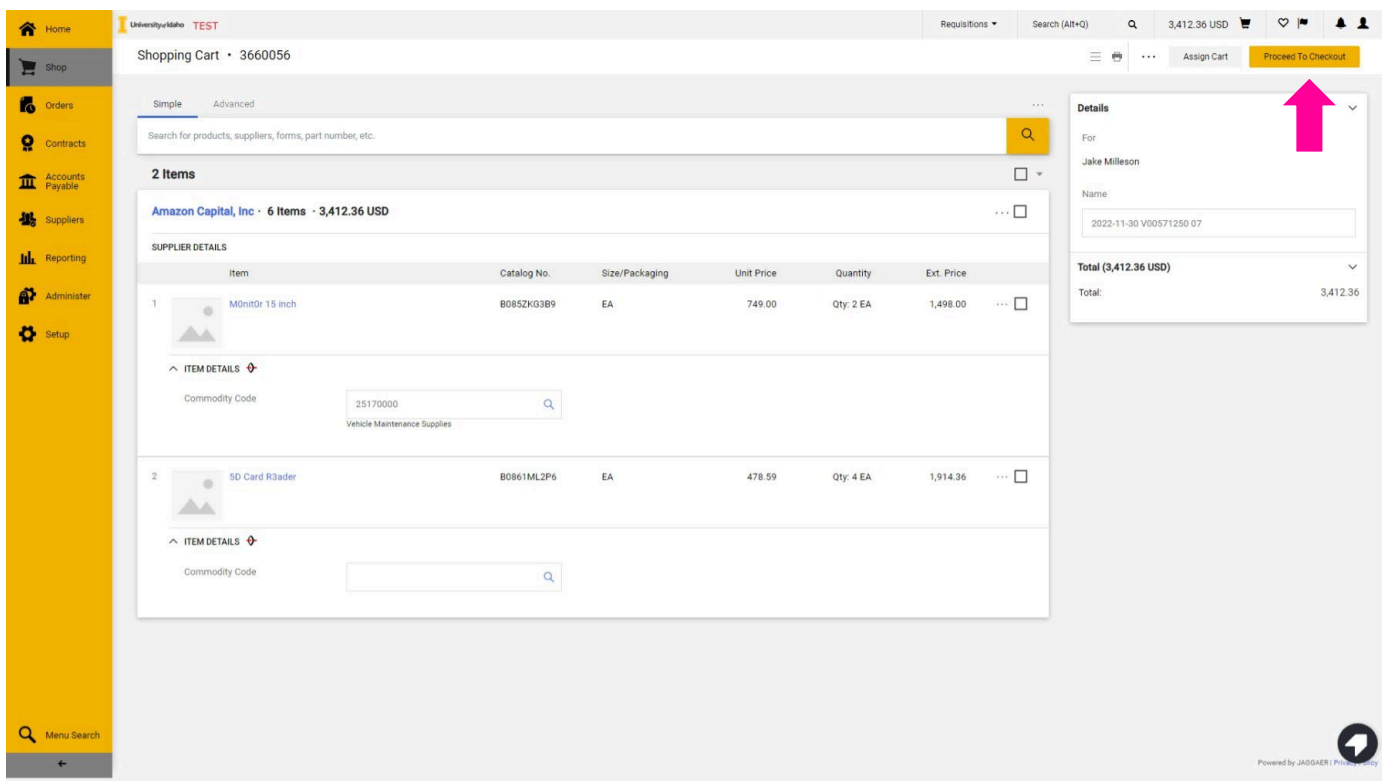
Within 30 days of delivery, you may return new, unopened merchandise in its original condition. Exceptions and restrictions apply. See Amazon.com's [Returns Policy](#)  
Go to the [Amazon.com homepage](#) without completing your order.

Conditions of Use | Privacy Notice © 1996-2022, Amazon.com, Inc.

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.




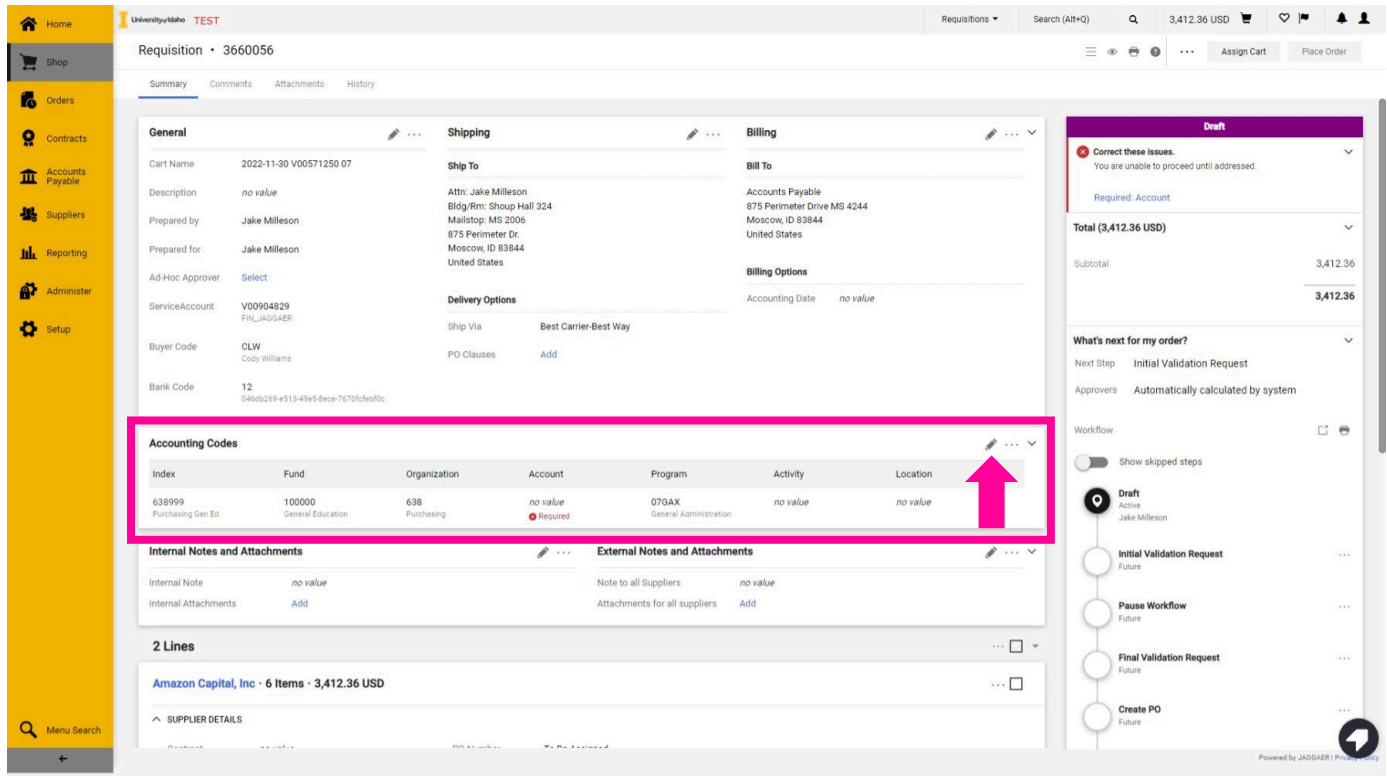
Once you return from your PunchOut to the JAGGAER system, you will see the line items in the center of the screen, with order details to the right.



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.



Requisition • 3660056

Summary Comments Attachments History

**General**  ...

Cart Name 2022-11-30 V00571250 07

Description no value

Prepared by Jake Milleson


Prepared for Jake Milleson

Ad-Hoc Approver Select

ServiceAccount V00904829  
FIN\_JAGGAER

Buyer Code CLW  
Cody Williams

Bank Code 12  
046d8269-e513-49e5-8ece-7670f6fed0c

**Shipping**  ...


Ship To

Attn: Jake Milleson  
Bldg/Rm: Shoup Hall 324  
Mailstop: MS 2006  
875 Perimeter Dr.  
Moscow, ID 83844  
United States

**Delivery Options**

Ship Via Best Carrier-Best Way

PO Clauses Add


**Billing**  ...

Bill To


Accounts Payable  
875 Perimeter Drive MS 4244  
Moscow, ID 83844  
United States

**Billing Options**

Accounting Date no value


**Accounting Codes**  ...

Index	Fund	Organization	Account	Program	Activity	Location
638999 Purchasing Gen Ed	100000 General Education	638 Purchasing	no value Required	07GAX General Administration	no value	no value

**Internal Notes and Attachments**  ...

Internal Note no value

Internal Attachments Add

**External Notes and Attachments**  ...

Note to all Suppliers no value

Attachments for all suppliers Add

**2 Lines** ...

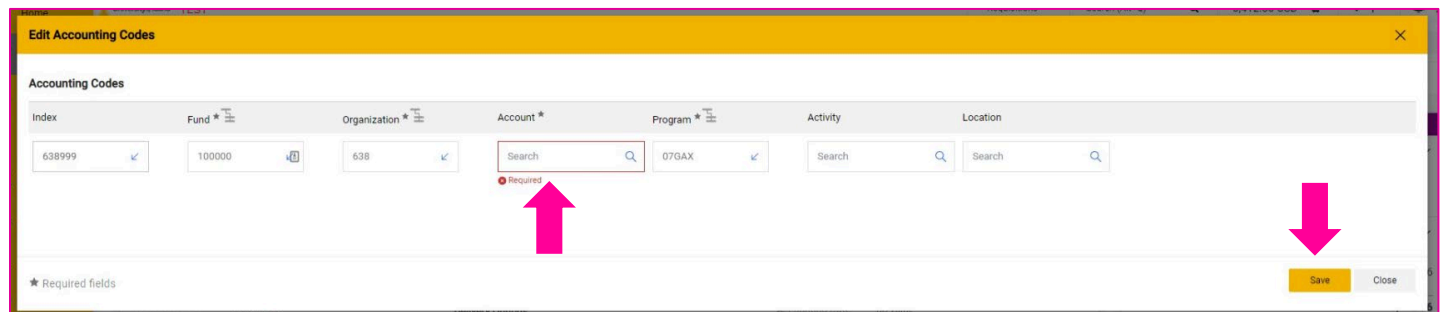
Amazon Capital, Inc - 6 Items - 3,412.36 USD

^ SUPPLIER DETAILS

Menu Search

Powered by JAGGAER | Procurement

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



Edit Accounting Codes

Accounting Codes

Index	Fund *	Organization *	Account *	Program *	Activity	Location
638999	100000	638	Search	07GAX	Search	Search

\* Required fields

Save Close

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.

The screenshot displays the JAGGAER requisition interface for requisition 3660056. The top navigation bar includes 'Home', 'Shop', 'Orders', 'Contracts', 'Accounts Payable', 'Suppliers', 'Reporting', 'Administer', and 'Setup'. The main content area is divided into several sections: 'General' (Cart Name: 2022-11-30 V00571250 07, Description: no value, Prepared by: Jake Milleson), 'Shipping' (Ship To: Attn: Jake Milleson, Bldg/Rm: Shoup Hall 324, Mallstop: MS 2006, 875 Perimeter Dr., Moscow, ID 83844, United States; Delivery Options: Ship Via: Best Carrier-Best Way, PO Clauses: Add), 'Billing' (Bill To: Accounts Payable, 875 Perimeter Drive MS 4244, Moscow, ID 83844, United States; Billing Options: Accounting Date: no value), 'Accounting Codes' (Table with columns: Index, Fund, Organization, Account, Program, Activity, Location), 'Internal Notes and Attachments', and 'External Notes and Attachments'. A '2 Lines' section shows 'Amazon Capital, Inc - 6 Items - 3,412.36 USD'. On the right side, a 'Draft' summary shows a total of 3,412.36 USD and a workflow diagram with steps: Draft (Active, Jake Milleson), Initial Validation Request (Future), Pause Workflow (Future), Final Validation Request (Future), Create PO (Future), and Finish (Future). A pink arrow points to the 'Place Order' button in the top right corner.

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

The screenshot shows the JAGGAER requisition status page for requisition 3660056. The top navigation bar includes 'Simple', 'Advanced', 'Go to: Non-Catalog Item | Favorites | Forms | Shop | Quick Order', and 'Browse: Suppliers | Categories | Contracts'. A search bar is present. A green banner at the top reads 'Requisition 3660056 Submitted'. Below this, the 'Summary' section contains the following information: Requisition number: 3660056 (highlighted with a pink arrow), Requisition status: Pending, Cart name: 2022-11-30 V00571250 07, Requisition date: 11/30/2022, Requisition total: 3,412.36 USD, and Number of line items: 2. The 'Options' section includes links for 'Print', 'Recent orders', and 'Return to your home page'.



# 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.

The screenshot displays the JAGGAER requisition details for requisition number 3660056. The interface includes a top navigation bar with 'University of Idaho TEST', 'Requisitions', and a search bar. A left-hand menu contains options like Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area is divided into several sections:

- General:** Status: Pending (Pause Workflow), Submitted: 11/30/2022 11:36 AM, Cart Name: 2022-11-30 V00571250 07, Description: no value, Prepared by: Jake Milleson, Prepared for: Jake Milleson, ServiceAccount: V00904829 (FIN\_JAGGAER), Buyer Code: CLW (Cody Williams), Bank Code: 12 (0468269+e513-49e5-8ece-7676cfe6f0c).
- Shipping:** Ship To: Attn: Jake Milleson, Bldg/Rm: Shoup Hall 324, Mailstop: MS 2006, 875 Perimeter Dr, Moscow, ID 83844, United States. Delivery Options: Ship Via: Best Carrier-Best Way, PO Clauses.
- Billing:** Bill To: Accounts Payable, 875 Perimeter Drive MS 4244, Moscow, ID 83844, United States. Billing Options: Accounting Date: 11/30/2022.
- Accounting Codes:** A table with columns: Index, Fund, Organization, Account, Program, Activity, Location. Row 1: 638999, 100000, 638, E5410, 07GAX, no value, no value.
- Internal Notes and Attachments:** Internal Note: no value, Internal Attachments.
- External Notes and Attachments:** Note to all Suppliers: no value, Attachments for all suppliers.
- 2 Lines:** Amazon Capital, Inc - 6 Items - 3,412.36 USD.

On the right, a 'Pending' sidebar shows a workflow with steps: Submitted (11/30/2022 11:36 AM, Jake Milleson), Initial Validation Request (Completed), Pause Workflow (Active), Final Validation Request (Future), Create PO (Future), and Finish (Future). A 'Total (3,412.36 USD)' section shows a subtotal of 3,412.36. A 'What's next?' section shows a 'Workflow' toggle and a 'Show skipped steps' button. The bottom right corner has a 'Powered by JAGGAER | Privacy Policy' logo.

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.

**Pending**

Total (3,412.36 USD) ▼

Subtotal	3,412.36
	<b>3,412.36</b>

**What's next?** ▼

Workflow 📄 🖨️

Show skipped steps

- Submitted**  
11/30/2022 11:36 AM  
Jake Milleson
- Initial Validation Request**  
Completed ⋮
- Pause Workflow**  
Active ⋮
- Final Validation Request**  
Future ⋮
- Create PO**  
Future ⋮
- Finish**  
Future ⋮

**(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.

**Completed**

Total (3,412.36 USD) ▼

Subtotal	3,412.36
	<b>3,412.36</b>

**Related Documents** ▼

[Purchase Order: P0064571](#) 🖨️

**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).

# 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).

The screenshot displays the 'Purchase Order' interface for 'Amazon Capital, Inc.' with PO number 'P0064571' and 'Revision 0'. The top navigation bar includes 'University of Idaho TEST', 'Requisitions', 'Search (Alt+Q)', '0.00 USD', and user icons. The main content area is divided into several sections:

- General Information:** PO/Reference No. P0064571, Revision No. 0, Supplier Name Amazon Capital, Inc., Address PO Box 84023 Seattle, US-WA 98124-8423 United States, Purchase Order Date 11/30/2022, Total 3,412.36, Requisition Number 3660056, ServiceAccount V00904829, POGUID 905e41f4-9ff9-458d-aa05-3db21f4dea71, Buyer Code CLW, Bank Code 12.
- Shipping Information:** Ship To Address Code 22812, Ship To Attn: Jake Milleson, Bldg/Rm: Shoup Hall 324, Mailstop: MS 2006, 875 Perimeter Dr, Moscow, ID 83844, United States, Delivery Options Ship Via Best Carrier-Best Way.
- Billing/Payment:** Bill To Address Code Bill to, Bill To Accounts Payable, 875 Perimeter Drive MS 4244, Moscow, ID 83844, United States, Billing Options Accounting Date 11/30/2022, Payment Terms 0% 0, Net 30, F.O.B. Destination.
- Distribution Information:** Distribution Methods section with a note: 'The system will distribute purchase orders using the method(s) indicated below:'.
- Supplier Information:** Supplier Information section with Supplier Number AMACAP.

On the right side, a 'Completed' status bar shows a workflow: Submitted (11/30/2022 11:38 AM, Jake Milleson), Start - Parallel Steps, PO Validation (Completed), and WaitForPONumber (Approved). A 'What's next?' section shows 'Workflow Status' as 'Completed'.

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:

The ribbon example shows the navigation options for the Purchase Order: Status, Summary (selected), Revisions (1), Confirmations, Shipments, Change Requests, Receipts, Invoices, Comments (1), Attachments, and History.

**Completed**

---

**Details** ▼

Supplier Status

Sent To Supplier

Supplier

Amazon Capital, Inc

---

**Total (3,412.36 USD)** ▼

Subtotal	3,412.36
	<b>3,412.36</b>

---

**Related Documents** ▼

[Requisition: 3660056](#) 🖨️

---

**What's next?** ▼

Workflow Status ● Completed

Workflow 📄 🖨️

Show skipped steps

✓ **Submitted**  
11/30/2022 11:38 AM  
Jake Millison

◇ Start - Parallel Steps

✓ **PO Validation** ...  
Completed

✓ **WaitForPONumber** ...  
Approved

◇ End - Parallel Steps

✓ **Create Vendor Documents** ...  
Completed

✓ **Send PO to Vendor** ...  
Completed



✓ **Completed**  
11/30/2022 11:38 AM


**(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)

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

  Reply  Reply All  Forward  

Wed 11/30/2022 3:08 PM



## 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

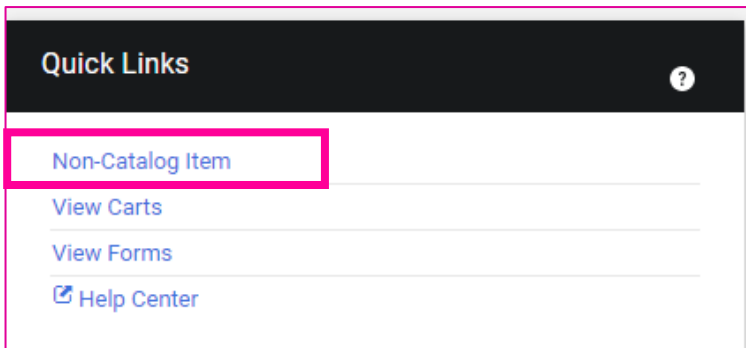
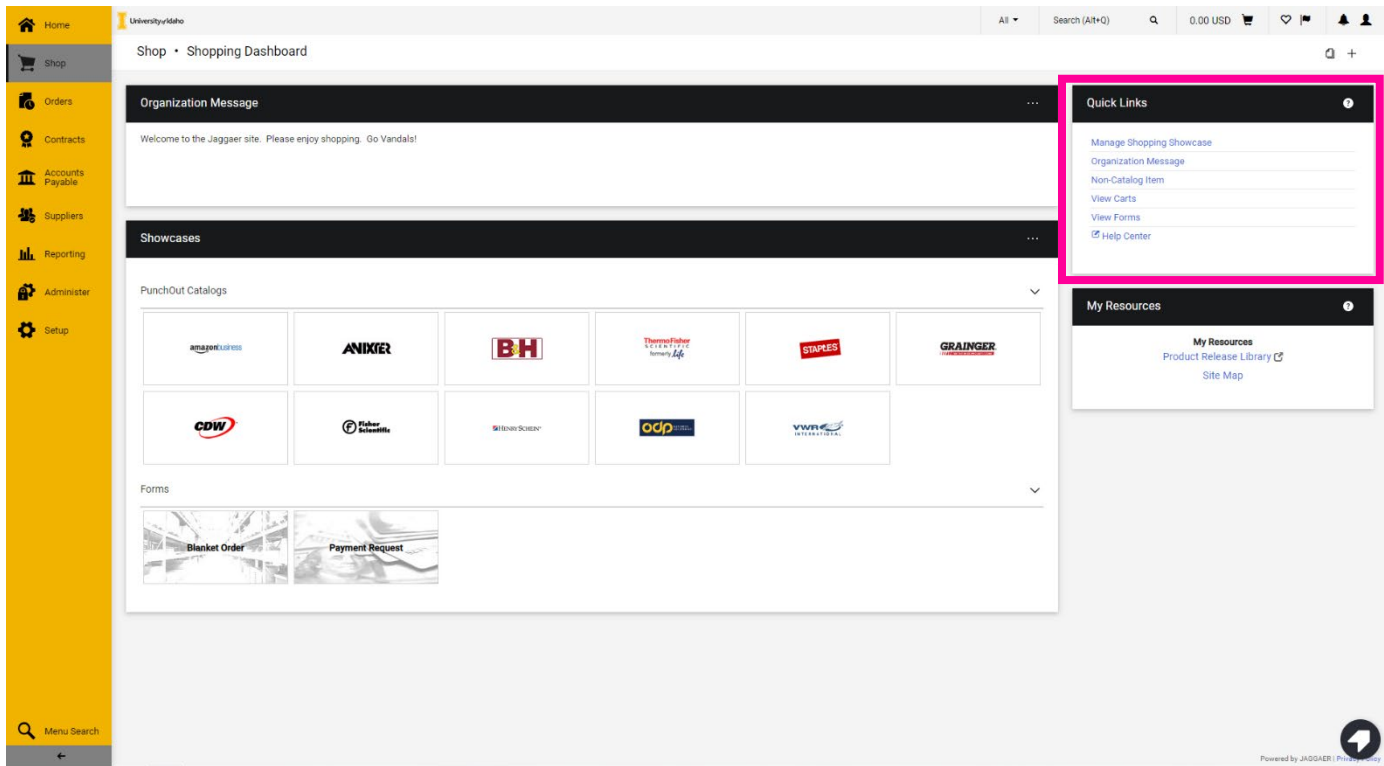
## What is a Non-Catalog vendor?

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](mailto: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.

University of Idaho

All Search (Alt+G) 0.00 USD

### Add Non-Catalog Item

Existing Supplier

Select Supplier

Item

Description	Catalog No.	Quantity	Price	Packaging
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA

254 characters remaining

Additional Details

Commodity Code

Product Flags

- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin
- Energy Star
- Green

Add Internal Attachments

★ Required fields

Save Save And Add Another Close

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](mailto: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.

**Add Non-Catalog Item**

Existing Supplier

Business Interiors of Idaho

**Fulfillment Address**

PO Purchase Order 1 - 176 S Capitol Blvd., Boise, Idaho 83702 United States

PO Purchase Order 2 - 178 S Capitol Blvd., Boise, Idaho 83702 United States

**Distribution Methods**

The system will distribute purchase orders using the method(s) indicated below:

Email (HTML Body) rachel@freeforminteriors.com

**Item**

Description *	Catalog No.	Quantity *	Price *	Packaging
Fern Task Chair for Jake - Contracts and Purchasing Quote 14021-42604 184 characters remaining		1	997.67	EA

**Additional Details**

Commodity Code

Product Flags

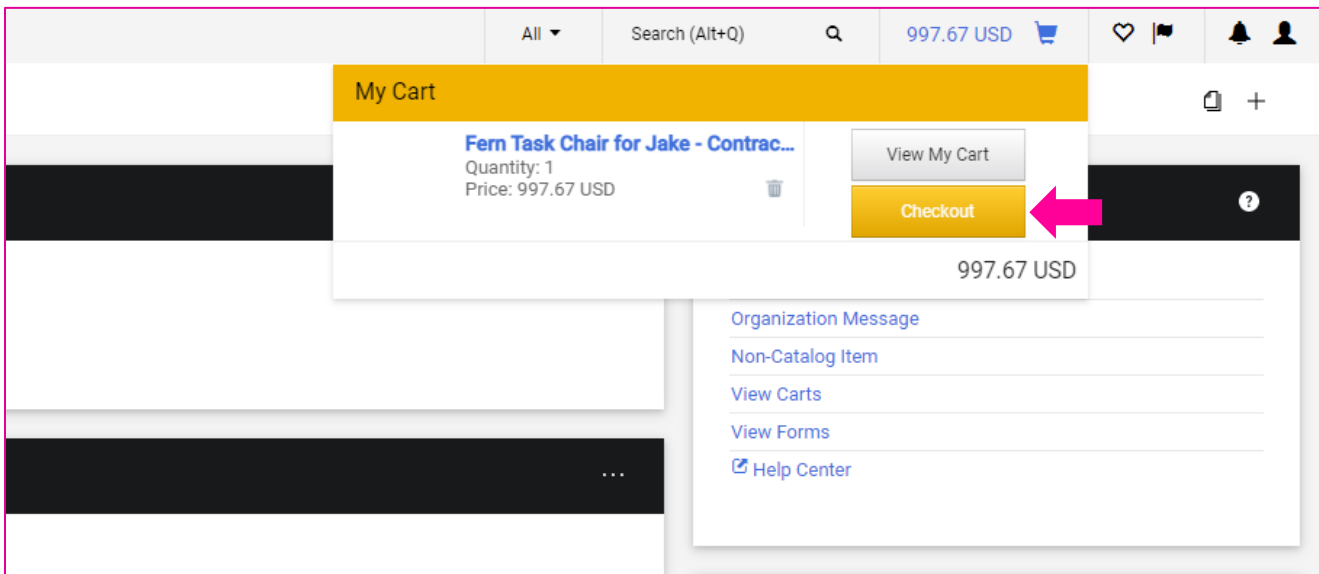
- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin


★ Required fields

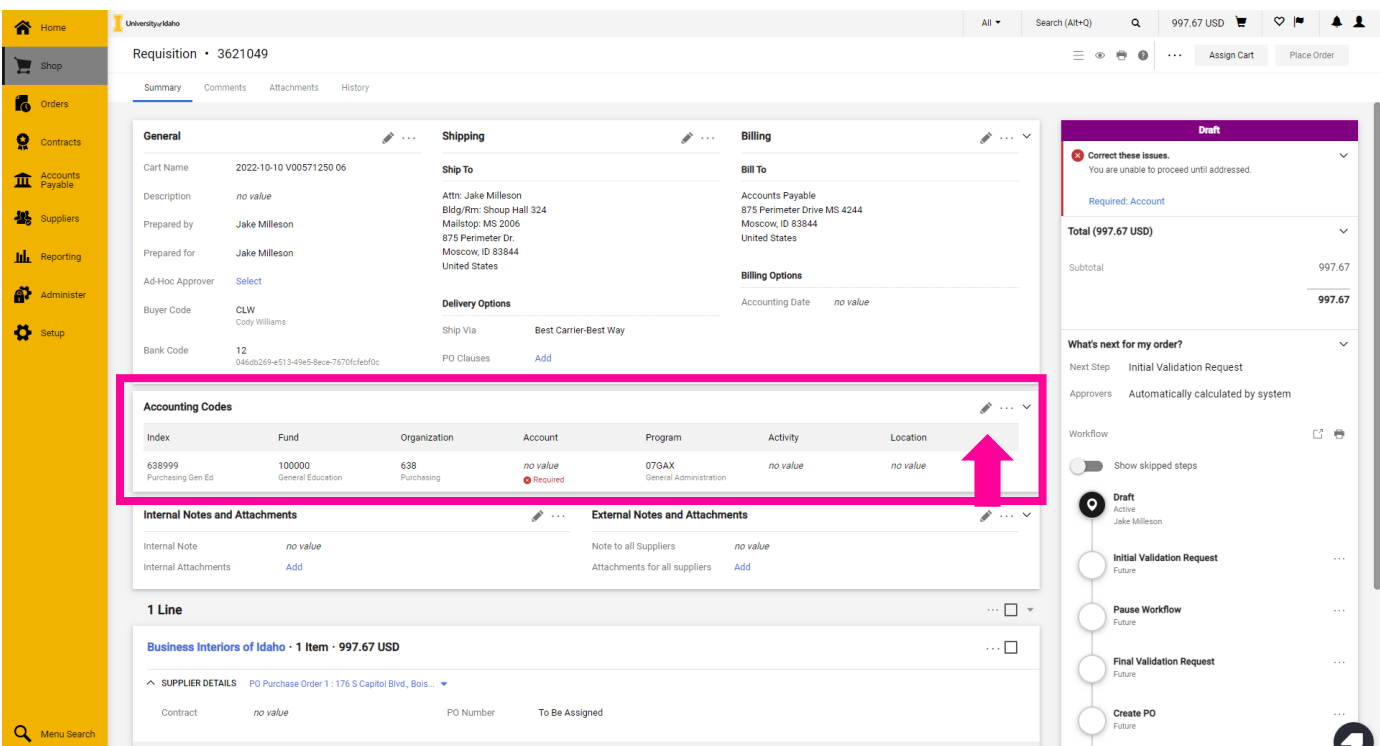
Save Save And Add Another Close



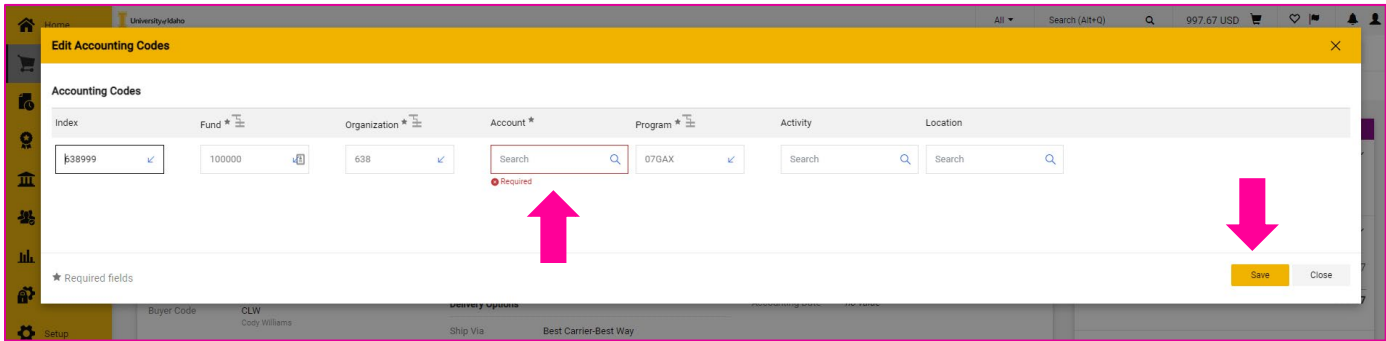
Here we can see that the item has been added to our active JAGGAER cart. We have the option to view or check out. We will select “**Checkout**” for this example.



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.



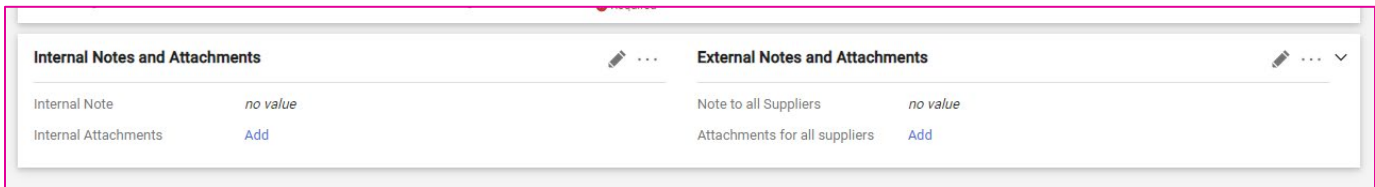
You will need to have at least one accounting line complete before placing the order.



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.

The screenshot displays the requisition details for 3621049. The interface includes a left-hand navigation menu with options like Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main area is divided into several sections: General (Cart Name, Description, Prepared by), Shipping (Ship To, Delivery Options), Billing (Bill To, Billing Options), Accounting Codes (a table with columns for Index, Fund, Organization, Account, Program, Activity, Location), Internal Notes, and External Notes. A '1 Line' section shows 'Business Interiors of Idaho' with a total value of 997.67 USD. A top right navigation bar contains 'Assign Cart' and 'Place Order' buttons. A right-hand sidebar shows a workflow with steps: Draft (Active), Initial Validation Request (Future), Pause Workflow (Future), Final Validation Request (Future), Create PO (Future), and Finish (Future). A pink arrow points to the 'Place Order' button.

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

The screenshot shows the status page for requisition 3621049. At the top, a green banner with a checkmark icon states 'Requisition 3621049 Submitted'. Below this is a 'Summary' table with the following data:

Field	Value
Requisition number	3621049
Requisition status	Pending
Cart name	2022-10-10 V00571250 06
Requisition date	10/10/2022
Requisition total	997.67 USD
Number of line items	1

To the right of the summary table is an 'Options' section with the following links:

- Print
- Recent orders
- Return to your home page

A pink arrow points to the '3621049' value in the 'Requisition number' field.

# 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.

University of Idaho

Requisition • 3621049

Summary Comments Attachments History

**General** ... **Shipping** ... **Billing** ...

Status **Pending**  
Pause Workflow

Submitted 10/10/2022 3:57 PM

Cart Name 2022-10-10 V00571250 06

Description no value

Prepared by Jake Milleson

Prepared for Jake Milleson

Buyer Code CLW  
Cody Williams

Bank Code 12  
046db269-e513-49e5-8e0e-7670fcef0fc

**Ship To**

Attn: Jake Milleson  
Bldg/Rm: Shoup Hall 324  
Mailstop: MS 2006  
875 Perimeter Dr.  
Moscow, ID 83844  
United States

**Delivery Options**

Ship Via Best Carrier-Best Way

PO Clauses

**Bill To**

Accounts Payable  
875 Perimeter Drive MS 4244  
Moscow, ID 83844  
United States

**Billing Options**

Accounting Date 10/10/2022

**Accounting Codes** ...

Index	Fund	Organization	Account	Program	Activity	Location
638999 Purchasing Gen Ed	100000 General Education	638 Purchasing	E5410 Office and Administrative Supplies	07GAX General Administration	no value	no value

**Internal Notes and Attachments** ... **External Notes and Attachments** ...

Internal Note no value

Internal Attachments

Note to all Suppliers no value

Attachments for all suppliers

**1 Line**

**Pending**

Total (997.67 USD)

Subtotal 997.67

**997.67**

**What's next?**

Workflow

Show skipped steps

**Submitted**  
10/10/2022 3:57 PM  
Jake Milleson

**Initial Validation Request**  
Completed

**Pause Workflow**  
Active

**Final Validation Request**  
Future

**Create PO**  
Future

**Finish**  
Future

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.

**Pending**

<b>Total (997.67 USD)</b>	▼
Subtotal	997.67
	<b>997.67</b>

**What's next?** ▼

Workflow 🔗 🖨️

Show skipped steps

- Submitted**  
10/10/2022 3:57 PM  
Jake Milleson
- Initial Validation Request**  
Completed
- Pause Workflow**  
Active
- Final Validation Request**  
Future
- Create PO**  
Future
- Finish**  
Future

**(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.

**Completed**

<b>Total (997.67 USD)</b>	▼
Subtotal	997.67
	<b>997.67</b>

**Related Documents** ▼

[Purchase Order: P0063984](#) 🖨️

**What's next?** ▼

**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).

# 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).

**Purchase Order** • Business Interiors of Idaho • P0063984 Revision 0

**General Information**

PO/Reference No.	P0063984
Revision No.	0
Supplier Name	Business Interiors of Idaho
Purchase Order Date	10/10/2022
Total	997.67
Owner Name	Jake Milleson
Owner Phone	
Owner Email	jacobmilleson@uidaho.edu
Requisition Number	3621049 <a href="#">view   print</a>
Internal PO Ref #:	3677080

**Document Status**

A/P status	Open
Workflow	✓ Completed (10/10/2022 4:00 PM)
The system distributed the purchase order using the method(s) indicated below the last time it was distributed. <a href="#">view</a>	
Email (HTML Body)	rachel@freeforminteriors.com
Distribution Date/Time	10/10/2022 4:00 PM
Supplier	Sent To Supplier

**Line Details**

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
✓	Fern Task Chair for Jake - Contracts and Purchasing Quote 14021-42604		EA	997.67	1 EA	997.67

**Supplier**

Supplier	Receiving	Invoicing	Matching
Sent To Supplier	none	none	No Matches

**Workflow Progress**

- Submitted (10/10/2022 3:59 PM) - Jake Milleson
- Start - Parallel Steps
- PO Validation (Completed)
- WaitForPONumber (Approved)
- End - Parallel Steps
- Create Vendor Documents (Completed)
- Send PO to Vendor (Completed)
- Completed (10/10/2022 4:00 PM)

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:

**Purchase Order** • Business Interiors of Idaho • P0063984 Revision 0

Status Summary Revisions **1** Confirmations Shipments Change Requests Receipts Invoices Comments Attachments History

**Completed**

**Details** ▼

Supplier Status

Sent To Supplier

Supplier

Business Interiors of Idaho


---

**Total (997.67 USD)** ▼

Subtotal	997.67
	<b>997.67</b>

---



**Related Documents** ▼

[Requisition: 3621049](#) 


---


**What's next?** ▼


Workflow Status ● Completed


Workflow  


Show skipped steps


 **Submitted**  
10/10/2022 3:59 PM  
Jake Millison


 Start - Parallel Steps


 **PO Validation** ...  
Completed

 **WaitForPONumber** ...  
Approved

 End - Parallel Steps

 **Create Vendor Documents** ...  
Completed

 **Send PO to Vendor** ...  
Completed

 **Completed**  
10/10/2022 4:00 PM

**(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](mailto:support@sciquest.com).


University of Idaho - PO Attached, PO#: P0064705

support@sciquest.com

To: Milleson, Jake (jacobmilleson@uidaho.edu); Williams, Cody (codyw@uidaho.edu)

Thu 3/2/2023 7:26 PM

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



TEST PO-PLEASE DO NOT FULFILL	Customer Purchase Order	
Purchase Order Date	PO/Reference No.	Revision No.
<b>Mar 2, 2023</b>	<b>P0064705</b>	<b>0</b>
<b>Buyer Information</b>		
Contact	Jake Milleson	
Email	<a href="mailto:jacobmilleson@uidaho.edu">jacobmilleson@uidaho.edu</a>	
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	Delivery Information
Charge to PO Listed Above	<b>Delivery Address</b>
Contract	ShipTo Address Code
Quote number	2281Z
PO Clauses	Attr: Jake Milleson
	Biogr/Rm: Shoup Hall 324
	Mailstop MS 2206
	Shipping address
	875 Perimeter Dr.
	Moscow, ID 83644
	United States
Billing address	<b>Delivery Information</b>
Accounts Payable	Requested Delivery Date
875 Perimeter Drive M5 4244	Ship Via
Moscow, ID 83644	Best Carrier-Best Way
United States	

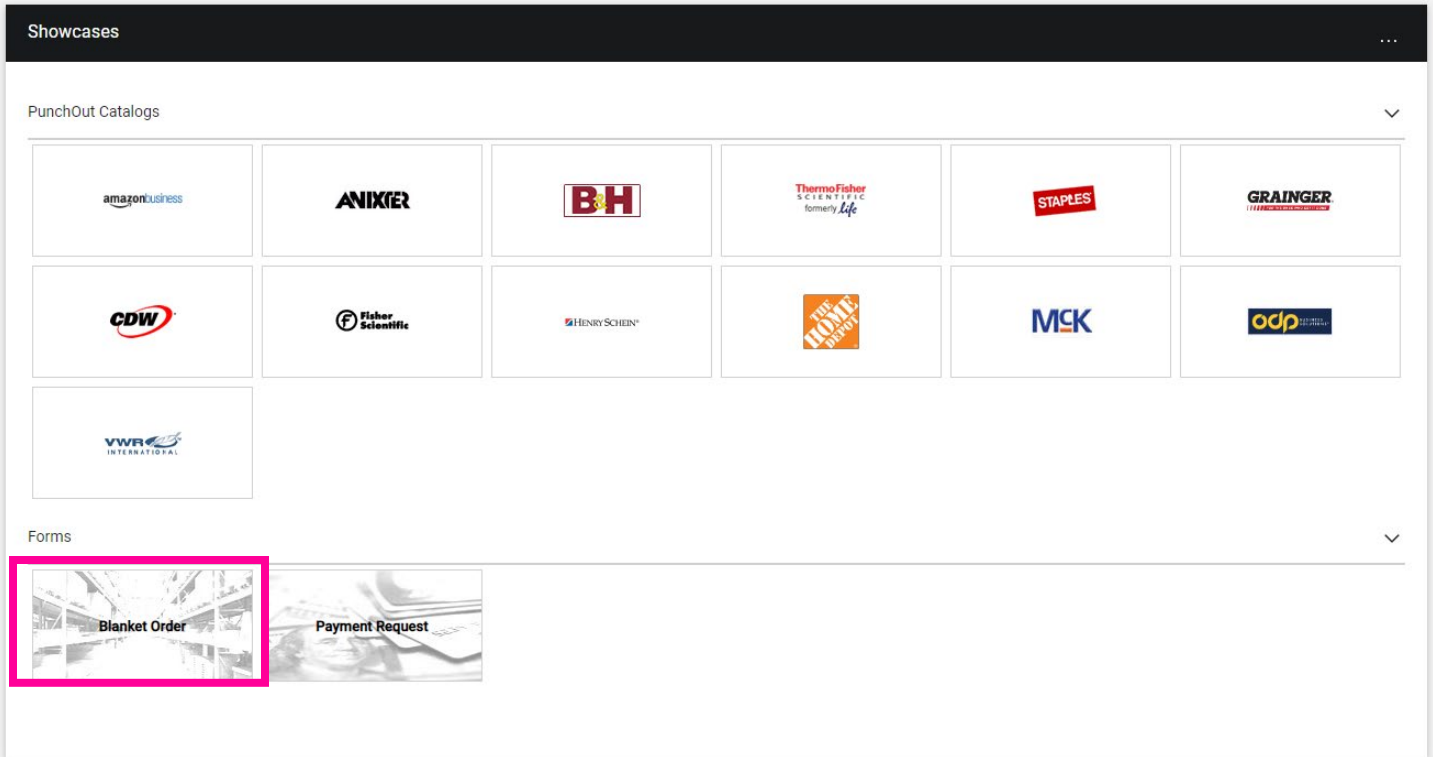
Line Item Details: Total lines ordered 1

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.						<b>Total</b>
						<b>544.00 USD</b>



# 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.

**Service Information**

Commodity Code *no value*

Description \*   
254 characters remaining [expand](#) | [clear](#)

Estimated Price \*

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+

## 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 ...**

**Create Contract**

**About the Contract** (Step 1 of 1)

Contract Name \* Example Contract

Contract Type \* Contract for Services  
In: University of Idaho > Contract for Services

Work Group \* College of Business and Economics  
Contracts and Purchasing Services

Main Document Template Contract for Services

\* Required Create 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.

The screenshot shows the 'Contract Header' form in the University of Idaho system. The form is titled 'JAG22-0093 Example Contract' and is currently in a 'Draft' state. The form is divided into several sections: 'Contract Header', 'Contract Parties', 'Dates and Renewal', and 'Additional Contract Information'. Annotations 1, 2, and 3 highlight specific areas of the form.

**Annotation 1:** Points to the contract number 'JAG22-0093' in the 'Contract Number' field.

**Annotation 2:** Points to the 'Contract Name' field, which contains 'Example Contract'.

**Annotation 3:** Points to the 'Contract Parties' table, specifically to the 'Contact' and 'Contract Address' columns for the 'Second Party (Primary)'.

Name	Currently Visible	Type	Contact	Contract Address
The Regents of the University of Idaho		First Party (Primary)	-	-
Idaho Cedar Sales	<span style="color: red;">✗</span>	Second Party (Primary)	-	-

**Dates and Renewal Section:**

- Time Zone: PDT/PST - Pacific Standard Time (US/Pacific)
- Start Date: 11/01/2022 12:00 AM
- End Date: 11/04/2022 11:59 PM
- Renewals Remaining: [ ]
- Automatically Apply Price: [ ] Yes [x] No
- Renewal Term: [ ] [ ]
- Auto-Renew: [ ] Yes [x] No

**Additional Contract Information Section:**

- INDEX: 123456

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.

> **Additional Details**

**Additional Contract Information**

INDEX \* ⓘ   
Field Validation

Additional INDEX ⓘ   
Field Validation

Is this INDEX a sponsored project? \* ⓘ  Yes  No 

Total Contract Amount \*  USD

**Department Information**

Top Level Department List \*

College of Business and Economics Departments \*

**Requester Information**

Requester Name \*

Requester City \*

Requester Zip Code \*

Requester Phone Number \*   
Field Validation

Requester Email \*

★ Required

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.

**Contract for Services Additional Information**

Statement of Work (SOW) - Exhibit A \*

EXAMPLE A - Short SOW -- Idaho Cedar Sales will provide a total of 2 speakers for the College of Business and Economics inaugural Idaho Wood Industries November 1-5, 2022 in Moscow Idaho. Total of 4 presentations, final schedule TBD. Total fees of \$3,000.

EXAMPLE B - Long SOW -- SOW Attached

Request for Certificate of Insurance to be sent to University of Idaho - Exhibit B \*

Do not include with Contract

Include with Contract

★ Required

## 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](mailto: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

**Add Attachments** ×

Attachment Type  Add My Own  
 Link  
 Create a Blank Word Document for Me

You can drag and drop multiple files into the gray box below. They will be attached in the order they appear.

Files ★  *Drop files to attach, or browse.*  
Maximum upload file size: 50.0 MB

Print Order

Print with Full Contract  Yes  No

Contract Summary Visibility

★ Required

## 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.

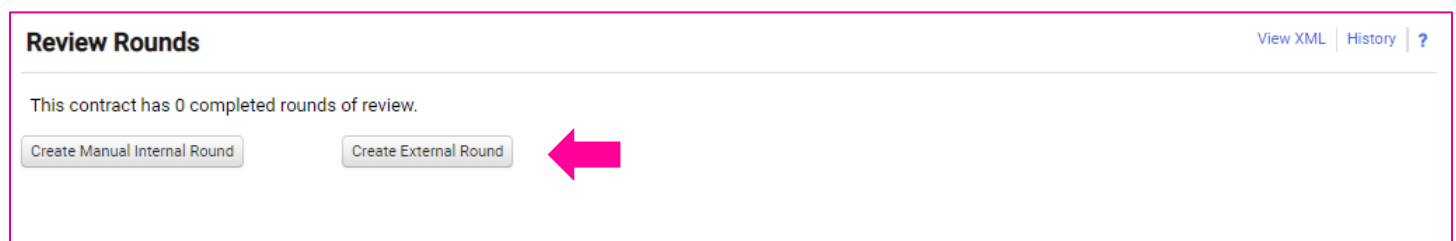
Also, Search and Filter is available only on the Occurrences view. And the option to mark an obligation complete is only available on the Occurrences view.

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.



The screenshot shows a web interface titled "Review Rounds". In the top right corner, there are links for "View XML", "History", and a question mark icon. Below the title, a message states "This contract has 0 completed rounds of review." At the bottom, there are two buttons: "Create Manual Internal Round" and "Create External Round". A pink arrow points to the "Create External Round" button.

### Internal Review Rounds

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



### Add Reviewer

requester   [More Options](#)

Name	
Requester, Roger	<input type="button" value="Select"/>
Requester, Ricky	<input type="button" value="Select"/>
Requester, Cody	<input type="button" value="Select"/>
Requester, Julia	<input type="button" value="Select"/>
Requester, Jake	<input type="button" value="Remove"/>

Selected Values

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

### Review Rounds

[View XML](#) [History](#) [?](#)

This contract has 0 completed rounds of review.

[Expand All](#) | [Collapse All](#)

▼ **Next Round (Internal - Manual)**

Status	Reviewer	Email	Phone Number	
<input type="button" value="Not Sent"/>	Shopper, Sally	jcevetello@hcg.com	-	<input type="button" value="Delete"/>
<input type="button" value="Not Sent"/>	Requester, Jake	jacobmilleson@uidaho.edu	-	<input type="button" value="Delete"/>

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

▼ **Round #1 (Internal - Manual)** (2/10/2023 - 2/14/2023)

Message From: Broyles, Barbara  
Hi Melanie - here is an agreement to review for IDLW. Thank you, Barbara

Tracking	Reviewer	Comment
<input type="button" value="Done"/> ⓘ	Christensen, Melanie	5-6161 M Christensen I approve


# 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.

The screenshot shows the 'Submit for Approval' interface for contract JAG22-0093. At the top, a blue banner indicates the contract is in 'Draft' status and provides instructions: 'Once done authoring, reviewing, and negotiating this contract, submit it for approval.' Below this, an orange banner states 'This Contract is currently checked out to You' and 'It is locked and cannot be edited by others until you check it in.' The main content area is titled 'Submit for Approval' and includes a green success message: 'All sections are complete. You may submit your contract for approval.' A progress table shows that both the 'Header' and 'Review Rounds' sections are complete. Below the progress table, the 'View Approval Steps' section is visible, showing a workflow: 'Submitted Future' -> 'Auto-create Contract PDF Future' -> 'Contracts/Purchasing Approval Future (View approvers)' -> 'Auto-Create Contract PDF Future' -> 'Send for eSignature Future'. A pink box highlights this workflow. At the bottom right, there are 'Previous' and 'Submit for Approval' buttons, with a pink arrow pointing to the latter.

The screenshot shows the 'Approval Details' modal dialog. It has a title bar with a close button (X). The main content area contains the text 'Enter Message to Approvers' and a large text input field. Below the input field, it says '2000 characters remaining'. At the bottom of the dialog, there are two buttons: 'Submit for Approval' and 'Close'.

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

 **Contract Submitted for Approval**

**Next Steps**  
What would you like to do next? Here are links to common actions:

- [View the Contract](#)
- [Create Another Contract](#)
- [Go to My Home Page](#)
- [Go to Contract Dashboard](#)

> **View Approval Steps**

**Contract Summary**

Contract Number	JAG22-0093	Time Zone	PDT/PST - Pacific Standard Time (US/Pacific)
Contract Name	Example Contract	Start Date	11/1/2022 12:00:00 AM
Contract Type	Contract for Services	End Date	11/4/2022 11:59:59 PM
Work Group	College of Business and Economics	Review Date	-
Contract Status	Pending Approval		

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

## 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](mailto: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**.

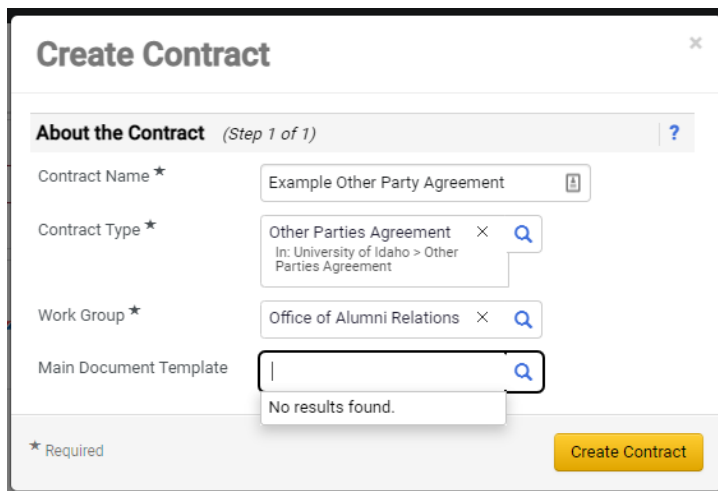
#### Key differences:

- 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.

**JAG22-0107**  
Example Other Party Agreement

Type: Other Parties Agreement  
2nd Party:  
Version: Renewal 0, Amendment 0

Upload Main Document ▼

Summary

**Header** ▲

Alternative Language	0
Attachments	0
Obligations	0
Review Rounds	0
Submit for Approval	

### 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

**JAG22-0103**  
Hotel Example

Type: Hotel Agreement  
2nd Party:  
Version: Renewal 0, Amendment 0

Upload Main Document ▼

Summary

**Header** ⚠

- Alternative Language 0
- Attachments 0
- Obligations 0
- Review Rounds 0
- Submit for Approval

(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.

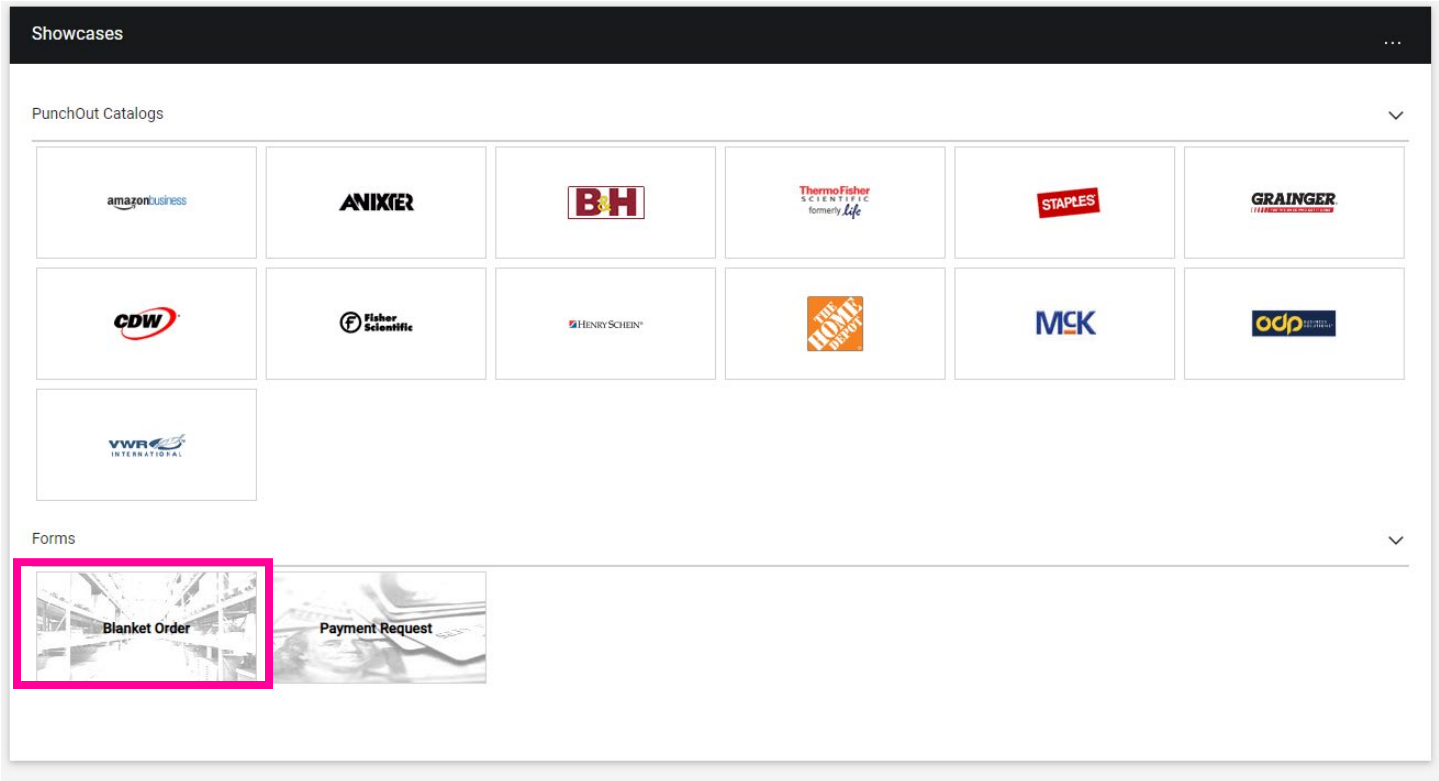


# Contract Blanket Orders (Contract Encumbrances)

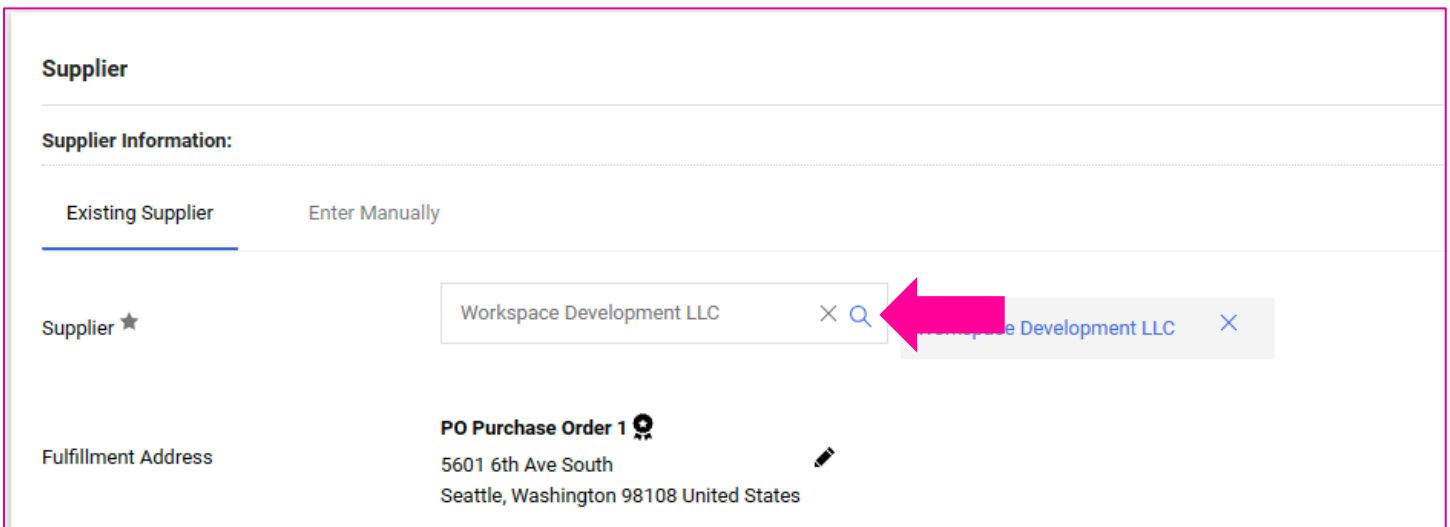
Departments now have the option to create a Blanket Order to encumber their fully executed contracts.

**!! IMPORTANT NOTE !!** Invoices for contracts that have been encumbered should be sent to [apdocs@uidaho.edu](mailto: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
<p>This method <b>does distribute</b> a copy of the Purchase Order to the vendor.</p> <p>To ensure that the vendor receives the PO number to invoice against, carefully review the email address(es) listed under the distribution method.</p> <div data-bbox="110 533 776 697" style="border: 1px solid black; padding: 5px;"> <p>Distribution Method <sup>★</sup></p> <p>The system will distribute purchase orders using the method(s) indicated below.</p> <p><input type="checkbox"/> Check this box to customize order distribution information.</p> <p>Email (HTML Body) <span style="float: right;">uofidahosupport@open-sq.com</span></p> </div>	<p>This method <b>does not distribute</b> a copy of the Purchase Order to the vendor.</p> <p>To edit the distribution method, begin by checking the box.</p> <div data-bbox="831 499 1497 663" style="border: 1px solid black; padding: 5px;"> <p>Distribution Method <sup>★</sup></p> <p>The system will distribute purchase orders using the method(s) indicated below.</p> <p><input checked="" type="checkbox"/> Check this box to customize order distribution information.</p> <p>Email (HTML Body) <span style="float: right;">uofidahosupport@open-sq.com</span></p> </div> <p>After selecting the “<i>customize distribution method</i>” check box, <u>change the email address to your own.</u></p> <div data-bbox="831 810 1497 1022" style="border: 1px solid black; padding: 5px;"> <p>Distribution Method <sup>★</sup></p> <p>The system will distribute purchase orders using the method(s) indicated below.</p> <p><input checked="" type="checkbox"/> Check this box to customize order distribution information.</p> <p>Email (HTML Body) <span style="float: right;"><input checked="" type="checkbox"/> <span style="border: 2px solid red; padding: 2px;">jacobmilleson@uidaho.edu</span></span></p> <p>Manual <input type="checkbox"/></p> </div>

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

**Service Information**

Commodity Code no value

Description <sup>★</sup>  230 characters remaining expand | clear

Estimated Price <sup>★</sup>

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.

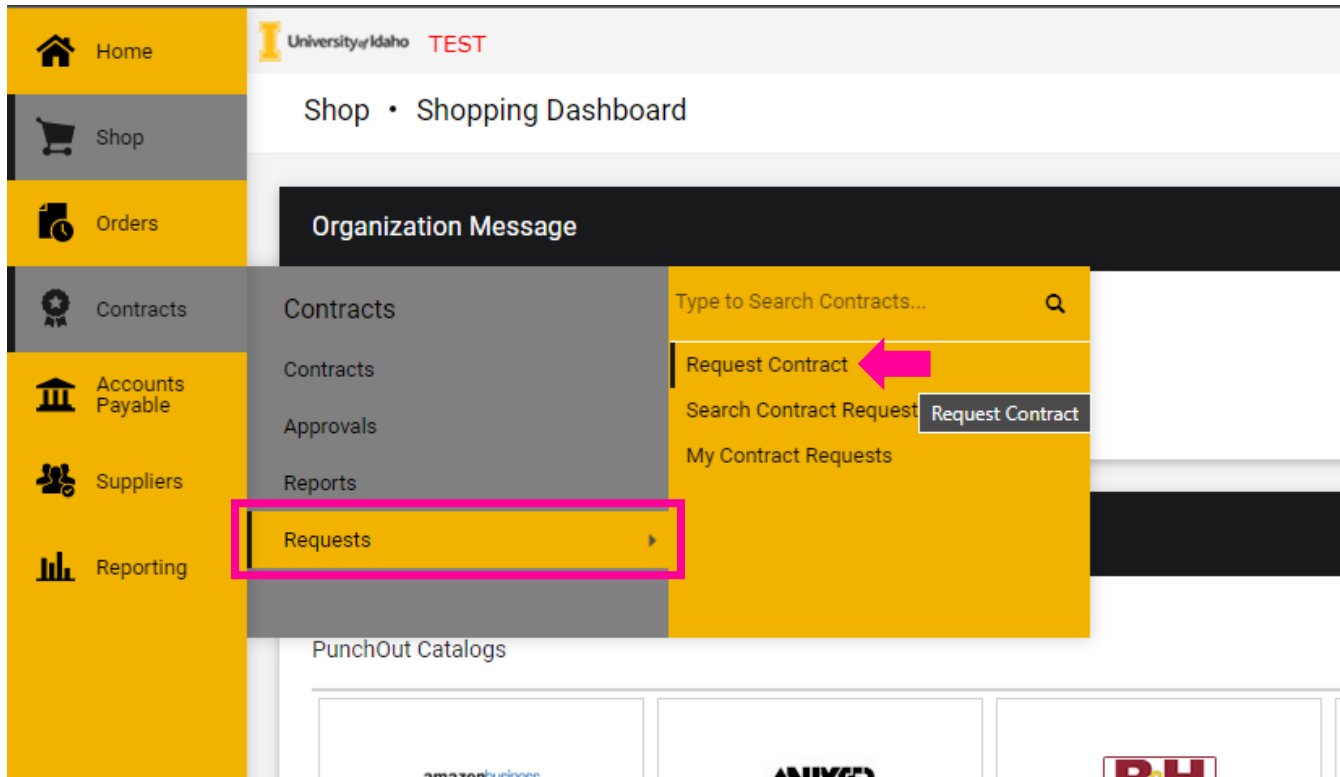
**Option One:** *Contract Blanket Orders (Contract Encumbrances)* for contracts that are encumbered after execution. Invoices should reference the PO number and be sent to [apdocs@uidaho.edu](mailto:apdocs@uidaho.edu) to be applied to the Purchase Order.

**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.

**Create Contract Request** X

Contract Request Name ★

Select a Contract Request Template ★  X 🔍

★ Required

Submit Close

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.

University of Idaho TEST

Purchase Orders Se

Contracts > Requests > My Contract Requests

< Back to My Contract Requests

**Example Contract**

Form Number: 725197  
Request Status: Incomplete

**Instructions**

Details

Attachments 0

Questions ✓

Review and Complete

Discussion

Contract Request Workflow

Print Request History ?

Please complete the Contract Request Form questions and attach any documents relevant to the Contract Request in the Attachments Section.

Next >

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.

The screenshot shows the 'Details' section of a contract request form. On the left is a sidebar with a navigation menu: 'Example Contract' (selected), 'Form Number: 735945', 'Request Status: Incomplete', 'Instructions', 'Attachments' (with a green circle containing '0'), 'Questions' (with a checkmark), 'Review and Complete', 'Discussion', and 'Contract Request Workflow'. The main content area is titled 'Details' and contains the following fields: 'Contract Request Name \*' with a text input field containing 'Example Contract', 'Template' with the value 'Contract Request Form', 'Contract Type' with a hyphen '-', and 'Description' with a hyphen '-'. At the top right of the main area are links for 'Print Request', 'History', and a help icon. At the bottom right are three buttons: 'Previous', 'Save Progress' (highlighted in yellow), and 'Next'.

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

The screenshot shows the 'Attachments' section of the contract request form. The sidebar on the left is identical to the previous screenshot, but the 'Attachments' item is now selected and highlighted in green, with a green circle containing '0'. The main content area is titled 'Attachments' and features a yellow 'Add Attachments' button at the top left. Below it is a dark grey 'Add Attachments:' label. At the bottom right of the main area are two buttons: 'Previous' and 'Next' (highlighted in yellow).

## 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
<b>Contract Name*</b>	This will be the name of the contract in JAGGAER and will also be included in emails to vendors.
<b>Work Group*</b>	Select your area – select the most specific work group as possible.  <i>For example: select “Vandal Brand Meats” or “Plant Sciences” instead of the “College of Agricultural and Life Sciences” work group.</i>
<b>Start Date*</b>	Date that contract begins. <i>NOTE: Leave time for contract to be approved and executed.</i>
<b>End Date</b>	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".
<b>Second Party*</b>	The party that we are doing business with. <b>!! Will need to be a vendor in Banner !!</b>
<b>Additional Second Parties</b>	Optional. Rarely used. Child field from above.
<b>Description of Service*</b>	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.
<b>INDEX*</b>	The six-digit index that will be used for this contract.
<b>Additional INDEX</b>	Optional second index that will be used for this contract.
<b>Total Contract Amount*</b>	Total contract amount.

\*Required fields

## Requester Information:

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

Example Contract

Form Number: 725197  
Request Status: Incomplete

Instructions  
Details  
Attachments  
Questions

**Review and Complete**

Discussion  
Contract Request Workflow

Review and Complete

Required fields complete

Section	Progress
Instructions	✓ No Required fields
Details	✓ No Required fields
Attachments	✓ No Required fields
Questions	✓ Required fields complete

★ Required

Previous Complete Request

## 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.

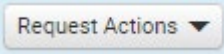
## Creating a Contract from a Request

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.

The screenshot shows a web interface for a Contract Request form. At the top, there is a navigation bar with a link to 'Back to Results' and a dropdown for '1 of 1 Results'. Below this is a prominent blue bar with the text 'Approved' and 'This Contract Request has been approved.' To the right of this bar is a 'Request Actions' dropdown menu. The main content area is divided into two sections: 'Example Contract' on the left and 'Instructions' on the right. The 'Example Contract' section includes fields for 'Form Number: 725197' and 'Request Status: Approved'. Below this is a sidebar with a list of options: 'Instructions', 'Details', 'Attachments' (with a green circle containing '0'), 'Questions' (with a green checkmark), 'Discussion', and 'Contract Request Workflow'. The 'Instructions' section contains the text: 'Please complete the Contract Request Form questions and attach any documents relevant to the Contract Request in the Attachments Section.' In the top right corner of the main content area, there are links for 'Print Request', 'History', and a help icon. A yellow 'Next >' button is located in the bottom right corner of the main content area.

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



# 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

  Reply  Reply All  Forward  



support@sciquest.com

To  Milleson, Jake (jacobmilleson@uidaho.edu)

Tue 12/20/2022 11:11 AM



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](mailto:apdocs@uidaho.edu)) for entry. DO NOT ENTER AS A PAYMENT REQUEST.**

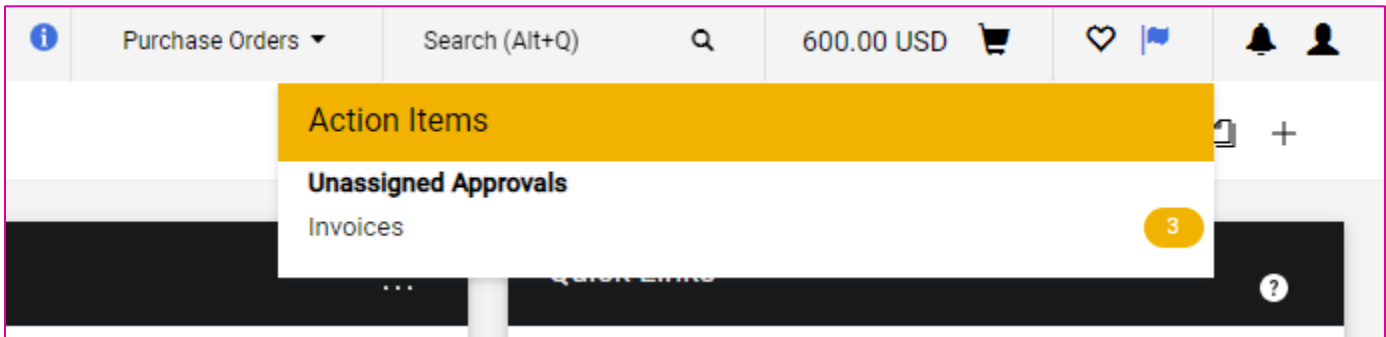
Once an invoice is entered by the Accounts Payable team, the **Shopper** will receive a system-generated email letting them know that they have an invoice ready to approve.

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 contact [ap-staff@uidaho.edu](mailto: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 contact [ap-staff@uidaho.edu](mailto: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](mailto:twells@uidaho.edu)

Melissa Hadaller: [mhadaller@uidaho.edu](mailto: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](mailto:apdocs@uidaho.edu)) for entry.***

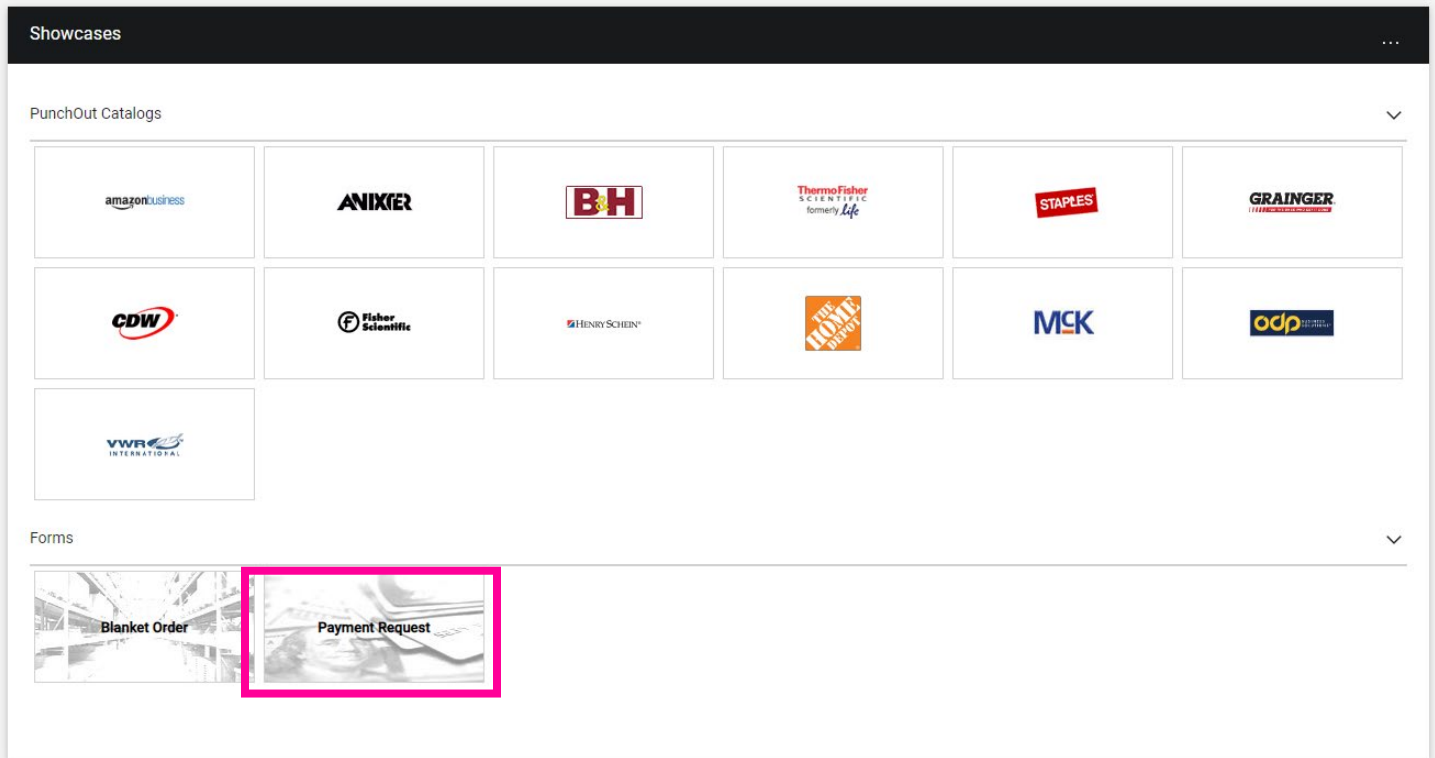
Once a Credit Memo is entered by the Accounts Payable team, the ***Shopper*** will receive a system-generated email letting them know that they have an invoice ready to approve.

# 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](mailto: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.

### Invoice / Payment Information


---

Existing Supplier   Enter Manually

Enter Supplier \*  


Can't find your Vendor? Please request a new Vendor by emailing : [Accounts Payable](#)

Supplier Inv # \*

Invoice Date \*    
mm/dd/yyyy

Invoice Amount \*

Description \*   
254 characters remaining   [expand](#) | [clear](#)

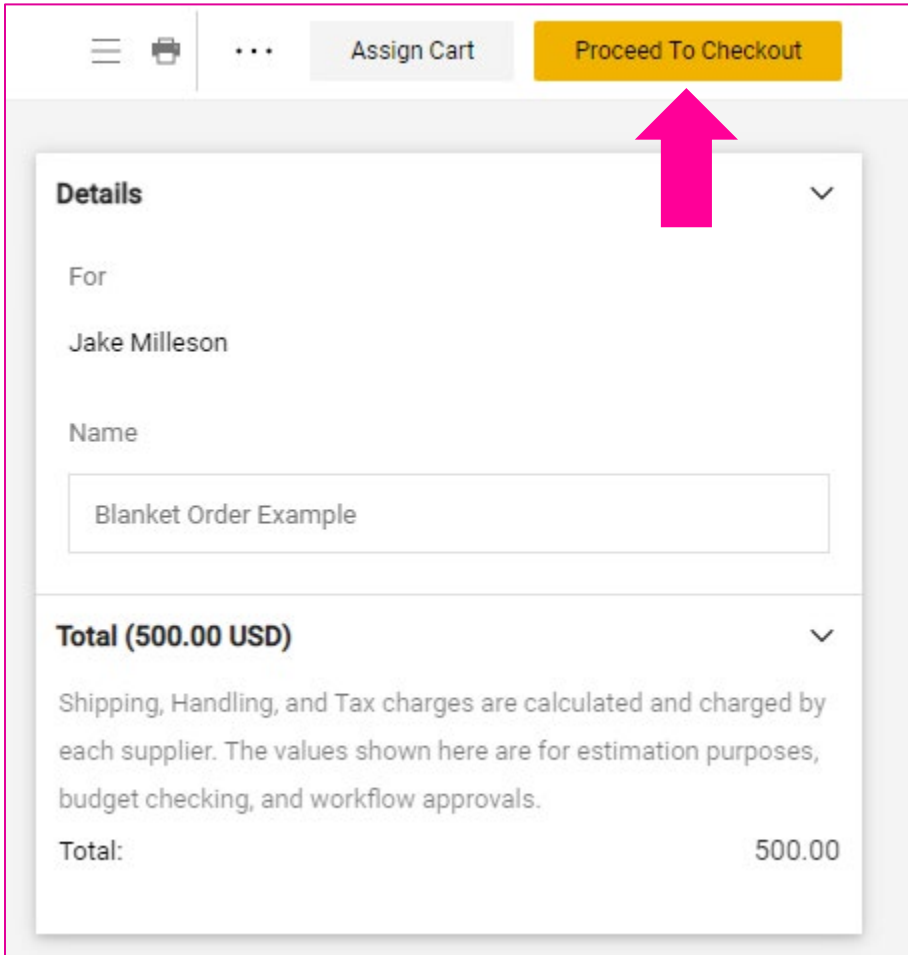
Due Date    
mm/dd/yyyy

Attachments   Please attach a copy of the invoice

Internal Attachments \*   [Add](#)



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.



The screenshot displays a software interface with a top navigation bar and a main content area. The navigation bar includes a menu icon, a printer icon, a three-dot menu, and two buttons: "Assign Cart" and "Proceed To Checkout". The "Proceed To Checkout" button is highlighted in yellow and has a pink arrow pointing to it. The main content area is divided into two sections: "Details" and "Total (500.00 USD)".

**Details**

For  
Jake Milleson

Name  
Blanket Order Example

**Total (500.00 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Total: 500.00

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

Requisition • 3678326

Summary Comments Attachments 1 History

**General**

Cart Name: Blanket Order Example  
 Description: no value  
 Prepared by: Jake Milleson  
 Prepared for: Jake Milleson  
 Ad-Hoc Approver: Select  
 ServiceAccount: V00904829  
 Buyer Code: JAG  
 Bank Code: 12

**Shipping**

Ship To: Attn: Jake Milleson, Bldg/Rm: Shoup Hall 324, Mailstop: MS 2006, 875 Perimeter Dr., Moscow, ID 83844, United States  
 Delivery Options: Ship Via: Best Carrier-Best Way, PO Clauses: Add

**Billing**

Bill To: Accounts Payable, 875 Perimeter Drive MS 4244, Moscow, ID 83844, United States  
 Billing Options: Accounting Date: no value

**Draft**

**Total (500.00 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal: 500.00  
**500.00**

**What's next for my order?**

Next Step: Accounts Payable Approval  
 Approver: AP manager, Christina

Workflow

- Draft (Active)
- Accounts Payable Approval (Future)
- Final Validation Request (Future)
- Create PO (Future)
- Finish (Future)

**Accounting Codes**

Index	Fund	Organization	Account	Program	Activity	Location
638999	100000	638	E5410	07GAX	no value	no value

**Internal Notes and Attachments**

Internal Note: no value  
 Internal Attachments: Add

**External Notes and Attachments**

Note to all Suppliers: no value  
 Attachments for all suppliers: Add

**1 Line**

Business Interiors of Idaho • 1 Item • 500.00 USD

Supplier Details: PO Purchase Order 1: 176 S Capitol Blvd., Bois...

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.

Invoice • Business Interiors of Idaho • Q0001351

Summary Matching Supplier Messages Comments Attachments 1 History

**General**

Invoice Type: Invoice  
 Invoice Source: Automated  
 Invoice Number: Q0001351  
 Supplier Invoice No: 123456  
 Supplier Name: Business Interiors of Idaho  
 Invoice Date: 12/28/2022  
 Discount Date: no value  
 Due Date: 1/27/2023 (is overridden)  
 Terms: 0% 0, Net 30  
 Terms Discount: 0.00 USD

**Addresses**

Remit To: 176 S Capitol Blvd., Boise, Idaho 83702, United States, Address Id AP Accounts Payable 1, 3rd Party Address ID a39a2995-7647-47ec-9a87-b55a6f997581  
 Bill To: Accounts Payable, 875 Perimeter Drive MS 4244, Moscow, ID 83844, United States

**Payment Information**

Accounting Date: 12/28/2022  
 Internal Note: no value

**Note/Attachments**

External Note: no value  
 External Attachments: Add  
 Internal Attachments: Add

**Discount, Tax, Shipping & Handling**

Use Terms Discount: X  
 Discount, tax, shipping & handling

**Complete**

**Business Interiors of Idaho**

Supplier Invoice No: 123456

**Total (500.00 USD)**

Subtotal: 500.00  
 Discount: 0.00  
 Tax1: 0.00  
 Tax2: 0.00  
 Shipping: 0.00  
 Handling: 0.00  
**500.00**

**Related Documents**

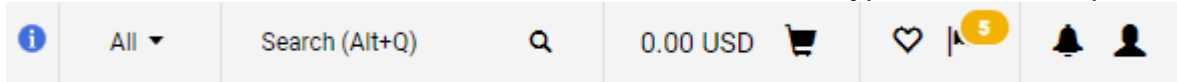
Purchase Order: 3721646  
 Requisition: 3678326

# Section 5: Appendix

## 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

A screenshot of the "Assign Substitute" dialog box. The title bar says "Assign Substitute" with a close button (X). Below the title bar is a checkbox labeled "Include Date Range for Substitution" which is checked. There are three input fields: "Substitute Name" with a search icon and the placeholder text "Type to filter..."; "Start Date" with a calendar icon and a clock icon, and the format "mm/dd/yyyy hh:mm a"; and "End Date" with a calendar icon and a clock icon, and the format "mm/dd/yyyy hh:mm a". At the bottom left, there is a legend "★ Required". At the bottom right, there are two buttons: "Assign" (highlighted in yellow) and "Close".

## 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](mailto:jaggaer@uidaho.edu) and/or [ap-staff@uidaho.edu](mailto: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](mailto: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](mailto: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](mailto: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.

# eProcurement

## 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.*

Requisition • 3685706

Summary Comments Attachments History

**General**

Cart Name 2023-01-10 V00571250 04

Description *no value*

Prepared by Jake Milleson

Prepared for Jake Milleson

Ad-Hoc Approver [Select](#)

ServiceAccount V00904829  
FIN\_JAGGAER

Buyer Code JAG  
JAGGAER

Bank Code 12  
046db269-e513-49e5-8ece-7670fcfeb0c

**Shipping**

**Ship To**

Attn: Jake Milleson  
Bldg/Rm: Shoup Hall 324  
Mailstop: MS 2006  
875 Perimeter Dr.  
Moscow, ID 83844  
United States

**Delivery Options**

Ship Via Best Carrier-Best Way

PO Clauses [Add](#)

**Accounting Codes**

Index	Fund	Organization	Account	Program
638999 Purchasing Gen Ed	100000 General Education	638 Purchasing	E5410 Office and Administrative Supplies	07GAX General Administration

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

### Ad-Hoc Approver ✕

After -

Ad-Hoc Approver

Comments   
1000 characters remaining

# 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**.

University of Idaho TEST All Search

Requisition • 3715842

Summary Comments Attachments History

**2 Lines**

**Business Interiors of Idaho • 4 Items • 3,120.00 USD**

^ SUPPLIER DETAILS PO Purchase Order 1 : 176 S Capitol Blvd., Bois...  
Contract: no value PO Number: To Be Assigned

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 line item one		EA	450.00	1 EA	450.00	⋮
^ ITEM DETAILS						
Contract:	no value	Internal Note	no value			
Commodity Code	no value	Internal Attachments	Add			
PO Clauses	Add	External Note	no value			
		Attachments for supplier	Add			
		NSF Override	no value			
2 line item two		EA	890.00	3 EA	2,670.00	⋮
^ ITEM DETAILS						
Contract:	no value	Internal Note	no value			
Commodity Code	no value	Internal Attachments	Add			
PO Clauses	Add	External Note	no value			
		Attachments for supplier	Add			
		NSF Override	no value			



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

The screenshot displays a procurement system interface with two line items. A context menu for 'line item one' is open, showing various actions. The 'Accounting Codes' option is highlighted with a pink rectangular box. The background interface includes a header for '2 Lines', a supplier details section for 'Business Interiors of Idaho', and item details for two lines. The first line has a unit price of 450.00 and a quantity of 1 EA. The second line has a unit price of 890.00 and a quantity of 3 EA. A total of 3,120.00 USD is shown at the top right.

This populates the Accounting Codes box for the selected line.

The screenshot shows the 'Override Line 1: Accounting Codes' dialog box. It features a table with the following columns: Index, Fund, Organization, Account, Program, Activity, and Location. The Index field is populated with 869993, Fund with 100000, Organization with 869, and Account with E5410. The Program field is populated with 07UNA. There are search boxes for Activity and Location. A 'Save' button is highlighted in yellow at the bottom right.

Index	Fund	Organization	Account	Program	Activity	Location
869993	100000	869	E5410	07UNA	Search	Search

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

**2 Lines**

**Business Interiors of Idaho · 4 Items · 3,120.00 USD**

^ SUPPLIER DETAILS PO Purchase Order 1 : 176 S Capitol Blvd., Bois... ▾

Contract *no value* PO Number To Be Assigned

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 line item one		EA	450.00	1 EA	450.00	
^ ITEM DETAILS						
^ ACCOUNTING CODES Values have been overridden for this line						
Index	Fund	Organization	Account	Program	Activity	Location
638999 Purchasing Gen Ed	100000 General Education	638 Purchasing	E5410 Office and Administrative Supplies	07GAX General Administration	<i>no value</i>	<i>no value</i>
2 line item two		EA	890.00	3 EA	2,670.00	
^ ITEM DETAILS						
^ ACCOUNTING CODES						
Index	Fund	Organization	Account	Program	Activity	Location
869993 Alumni Office	100000 General Education	869 Alumni Office	E5410 Office and Administrative Supplies	07UNA Other Institutional Actvty/Unallow	<i>no value</i>	<i>no value</i>

### 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.*

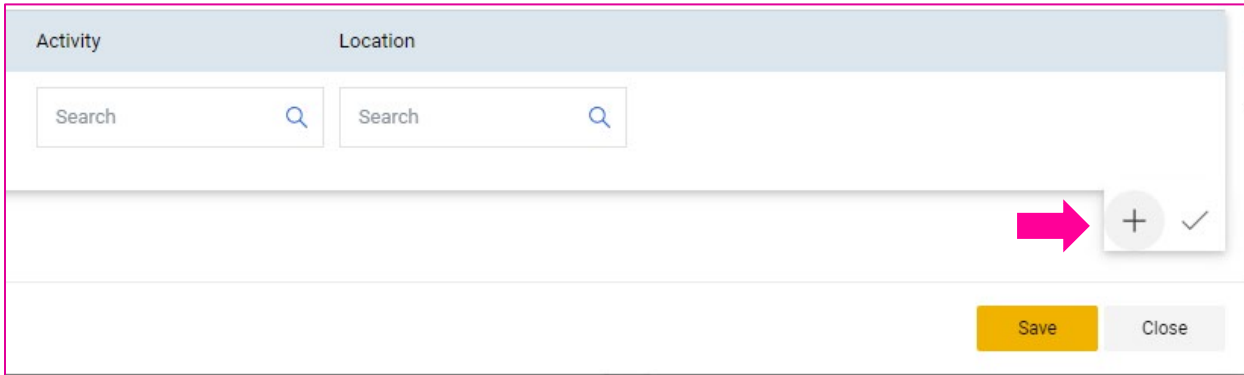
**Edit Accounting Codes**

Accounting Codes

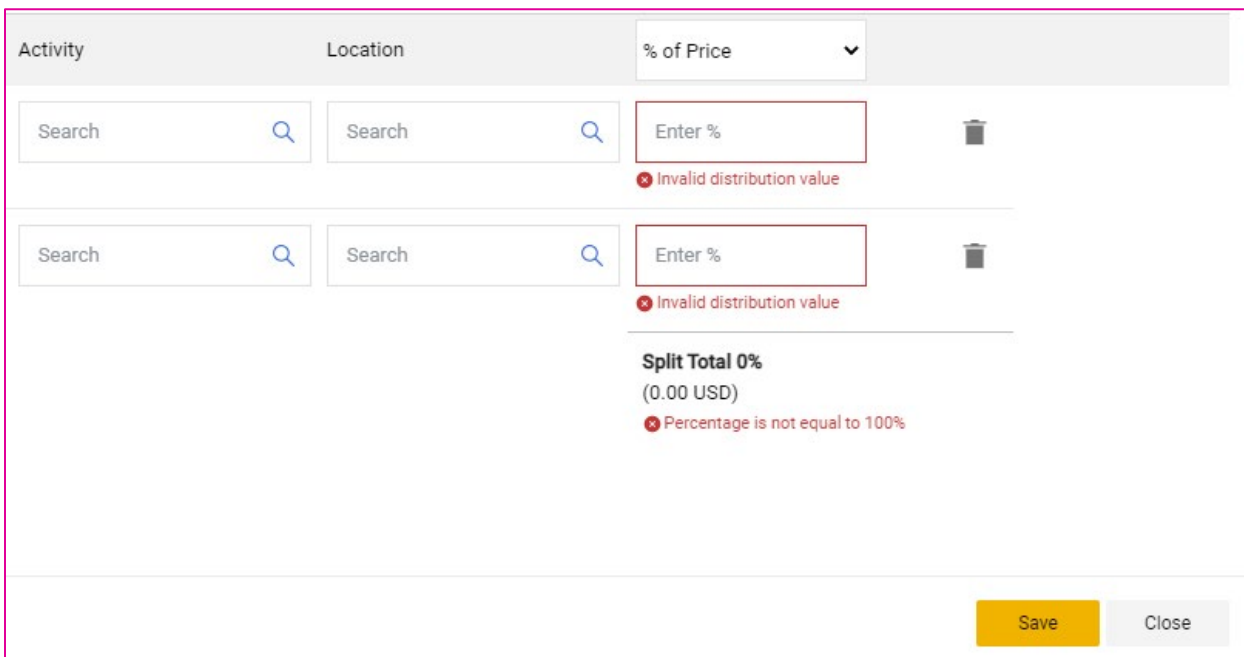
Index	Fund	Organization	Account	Program	Activity	Location
706978	210145	706	E5410	02UNA	Search	Search

Save Close

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](mailto: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**.

**Completed**

**Details** ▼

Supplier Status

▲ **Rejected**

Supplier

Business Interiors of Idaho

---

**Total (0.00 USD)** ▼

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	0.00
	<b>0.00</b>

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**.

The screenshot shows the Banner Requisition screen for requisition 3774882. The interface includes tabs for Summary, Comments, Attachments, and History. The main content area is divided into three sections: General, Shipping, and Billing. The Billing section is highlighted with a red box, and the pencil icon next to it is also highlighted with a red box. The Billing section contains the following information:

Billing	
<b>Bill To</b>	
Accounts Payable 875 Perimeter Drive MS 4244 Moscow, ID 83844 United States	
<b>Billing Options</b>	
Accounting Date	5/15/2023

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.*

**Edit Billing** ✕

**Bill To** ★

**CURRENT ADDRESS** ↻

Contact Line 1	Accounts Payable	<input type="checkbox"/> Add to my addresses
Address Line 1	875 Perimeter Drive MS 4244	
City	Moscow	
State	ID	
Zip Code	83844	
Country	United States	

Search additional   Results Per Page 10

**Billing Options**

Accounting Date    
mm/dd/yyyy

★ Required fields

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

**Billing Options**

Accounting Date    
mm/dd/yyyy

★ Required fields

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.

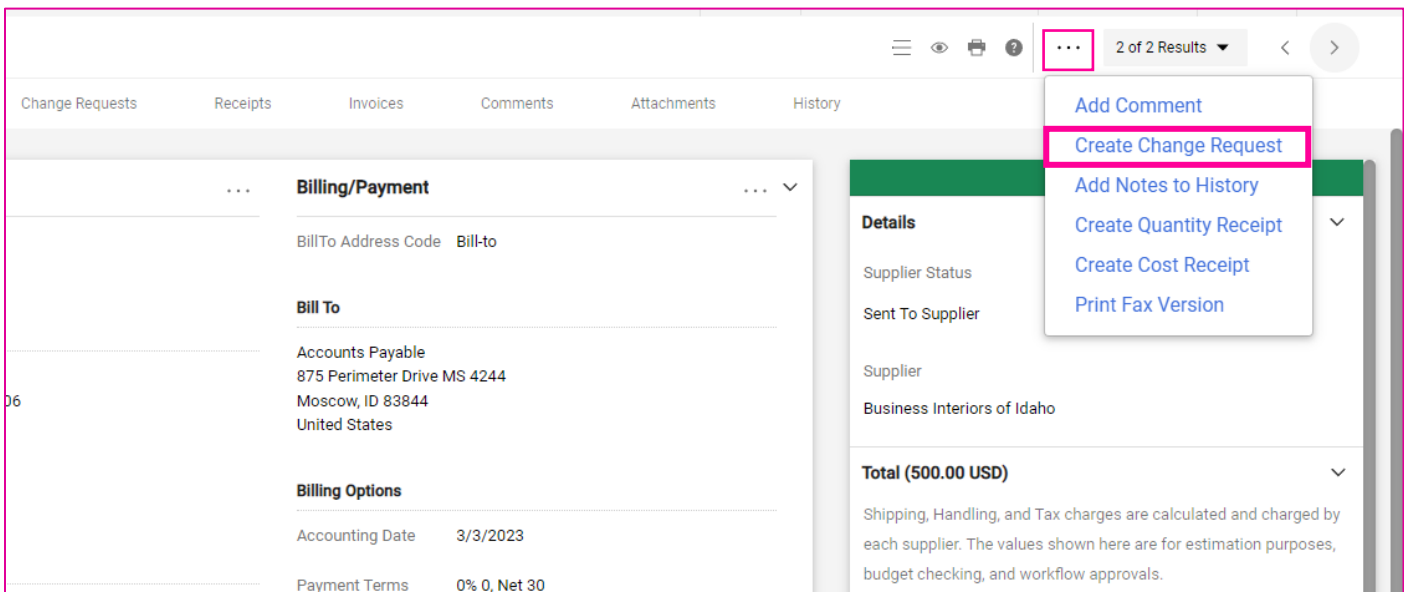
Most common case for changing an order owner is in the event that a person leaves or changes departments while orders are still pending – especially Blanket Orders.

If you need a PO Owner changed, please contact [jaggaer@uidaho.edu](mailto: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](mailto: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
<b>Shopper</b>	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)
<b>Requester</b>	Submit and edit carts before submitting.	Department Financial Staff.
<b>Buyer</b>	Approve/Return Requisitions.	<a href="#">Contracts and Purchasing Staff.</a>

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



# NSF (Non-Sufficient Funds) Workflows

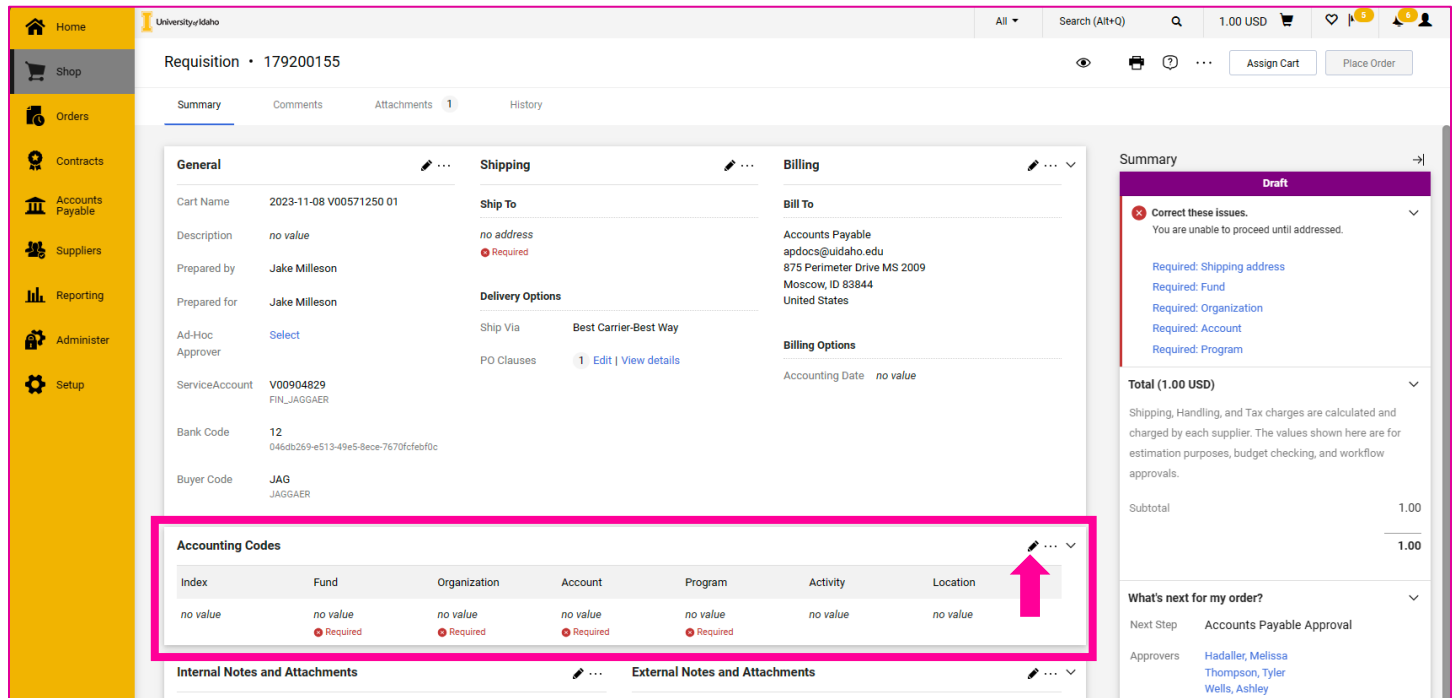
In the eProcurement module, NSF Review may be triggered in the following fund types:

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.



The screenshot shows the 'Requisition' screen for ID 179200155. The 'Accounting Codes' table is highlighted with a red box, and a red arrow points to the pencil icon for editing. The table contains the following data:

Index	Fund	Organization	Account	Program	Activity	Location
no value	no value	no value	no value	no value	no value	no value
	Required	Required	Required	Required		

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](mailto: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](mailto:jaggaer@uidaho.edu) for current step-by-step guides.

For other PunchOut vendors, please contact [jaggaer@uidaho.edu](mailto:jaggaer@uidaho.edu) or your assigned Buyer for assistance in creating the order properly.

# Contracts+

## 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.

The screenshot displays the 'Detailed Approval History' for contract **JAG23-0023**. At the top, a status bar indicates the contract is 'Executed: In Effect' and provides the end date: 'This contract is in effect through the end date of 6/30/2023 at 11:59 PM PDT.' Below this, a green banner prompts the user to 'Check Out' if they wish to edit the contract.

The main content area is titled 'Approvals' and features a message from Kathy Williams: 'This is a revised estimate due to the price of paper increasing for the Spring 2023 Edition.' Below the message, there are settings for 'Show skipped steps' (unchecked) and 'Orientation' (set to 'Horizontal').

The approval flowchart shows the following steps:

- Submitted**: 2/14/2023 8:19 AM
- Auto-create Contract PDF**: Completed ✓
- Department Approval**: Approved ✓ by Julie Clarkson-Gulick
- Contracts/Purchasing Approval**: Approved ✓ by Jake Milleson
- Auto-Create Contract PDF**: Completed ✓

The left sidebar contains navigation options: Summary, Header (checked), Alternative Language (0), Attachments (2), Obligations (0), Review Rounds (0), Approvals, Comments (1), Communication Center (0), Users and Contacts, Notifications, and Contract Family. In the top right corner of the main content area, there are links for 'View XML', 'History' (highlighted with a pink arrow), and a help icon.

## 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](mailto: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:

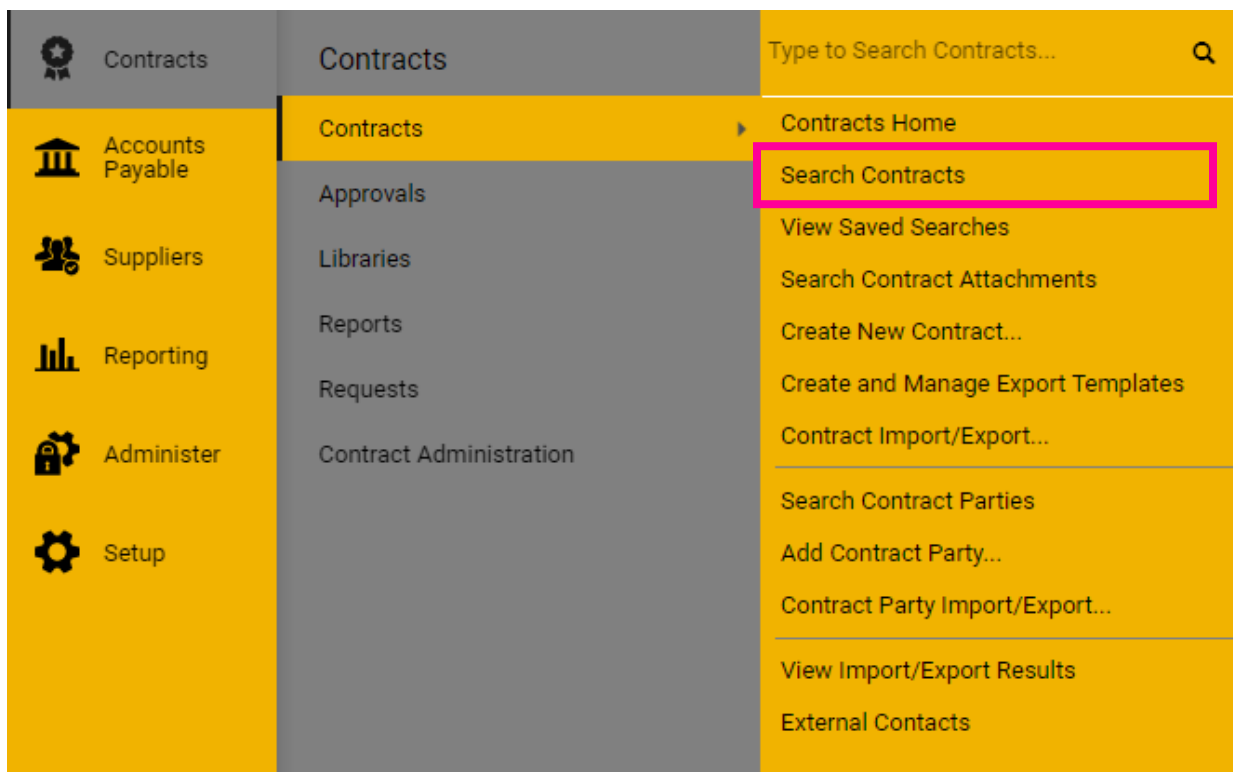
- Current Employees & Current Students – Contract HR with questions.
- Federally debarred businesses and organizations

## Contracts+ User Roles and Permissions

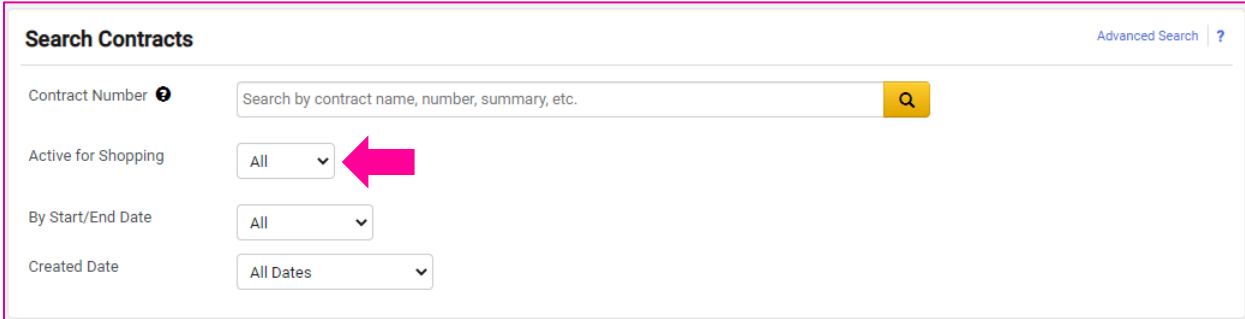
JAGGAER Role	Description	Common Job Titles
<b>Contract Requester</b> <i>*COMING SOON*</i>	Base user role for Contracts+ Module.  Allows users to request a contract from a Requesting a Contract for Services.  Contract must be approved by Contract Approver/Manager.	All Faculty and Staff, T1s
<b>Contract Manager</b>	Review and create contracts from contract request forms.	Department Financial Staff.
<b>Contract Approver</b>	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.



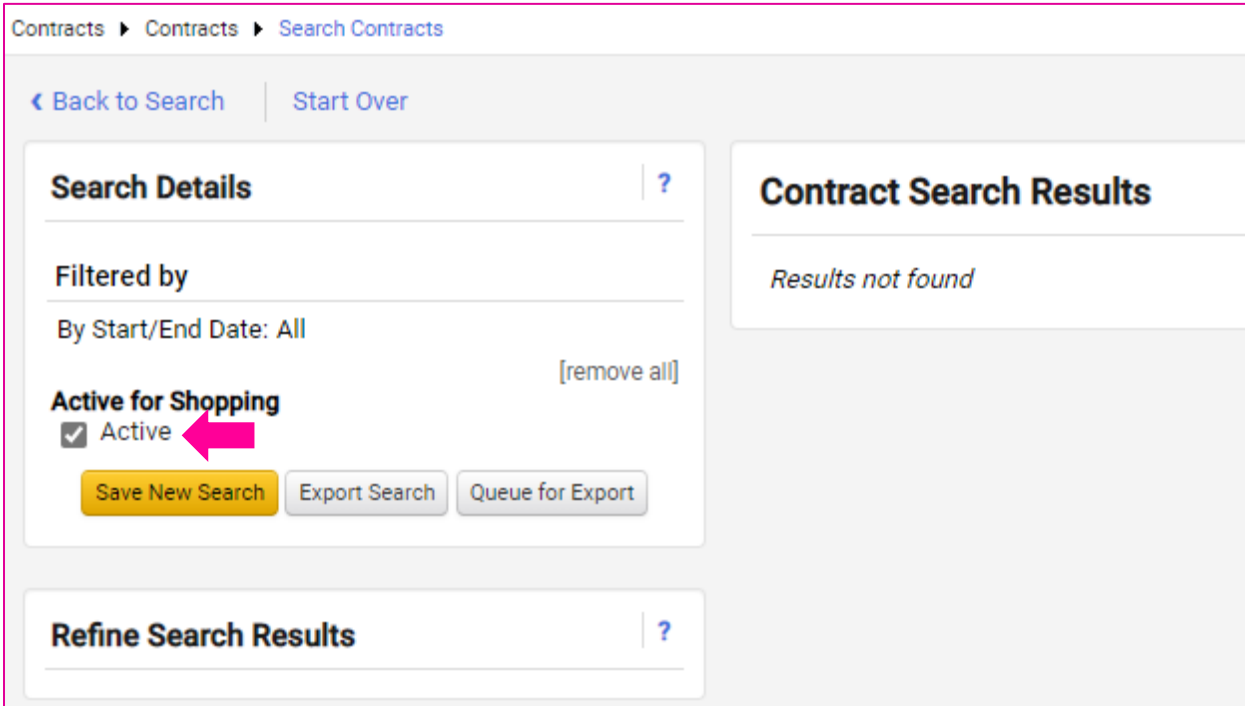
**Search Contracts** Advanced Search | ?

Contract Number ⓘ

Active for Shopping  

By Start/End Date

Created Date



Contracts > Contracts > Search Contracts

[← Back to Search](#) | [Start Over](#)


### Search Details

?

**Filtered by**

By Start/End Date: All [remove all]

**Active for Shopping**

Active 

### Contract Search Results

*Results not found*

### Refine Search Results

?

**!! 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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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”

The screenshot shows the JAGGAER Contracts+ interface for contract JAG24-00229. The contract is in an "Executed: In Effect" state, with an end date of 6/30/2024. The left sidebar contains a navigation menu with the following items and counts: Header (1), Contract for Services Add... (1), Alternative Language (1), Attachments (4), Obligations (0), Review Rounds (0), Approvals (0), Comments (1), and Communication Center (0). The "Attachments" item is highlighted with a pink box. The main content area displays the "Contract Header" and "Contract Parties" sections. The "Contract Parties" table lists two parties: "The Regents of the University of Idaho" (First Party, Primary) and "Communications Steps LLC" (Second Party, Primary). The "Dates and Renewal" section shows the contract is in PDT/PST time and has no renewals remaining.

Name	Currently Visible	Type	Contact	Contract Address
The Regents of the University of Idaho		First Party (Primary)	-	-
Communications Steps LLC	✗	Second Party (Primary)	Mary Van Donsel	8875 Butte Road Sweet, Idaho, 83670 US

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

[Back to Results](#)
15 of 225 Results

Executed: In Effect
 This contract is in effect through the end date of 6/30/2024 at 11:59 PM PDT.
 Contract Actions

If you would like to edit this contract please check it out.
 Check Out

**JAG24-00229**  
Communication Steps - Mary Van Donsel - SESTA

Type: Contract for Services  
 2nd Party: Communications Step...  
 Dates: 9/11/2023 - 6/30/2024  
 Version: Renewal 0, Amendment 0

View Contract

---

Summary

Header ✓

Contract for Services Add... ✓

Alternative Language 1

**Attachments** 4

Obligations 0

Review Rounds 0

Approvals

**Attachments** [View XML](#) | [History](#) | ?

Contract was fully executed on 9/13/2023 and uploaded on 9/13/2023.

[Fully Executed Contract \(356 KB\)](#)

General (3) Internal Only (0) Obligations (0)

Main Document

Print Order	Attachment	Print with Full Contract	Version	Size	Date Uploaded	
1	<a href="#">Main Document</a> 2023-09-01 JAG24-00229 - Contract for Services (version 4).docx	✓	4	36 KB	9/1/2023 9:37:59 AM	Actions
2	<a href="#">FY24_ID_SESTA_Communication_Steps_Donsel_SOW.docx</a>	✓	1	25 KB	9/1/2023 9:38:17 AM	Actions
3	<a href="#">Commu_Steps_Donsel_Insurance.pdf</a>	✓	1	54 KB	9/1/2023 9:38:25 AM	Actions



# Help and JAGGAER User Support

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