Ball State University
JAGGAER eProcurement Manual

Purchasing Services
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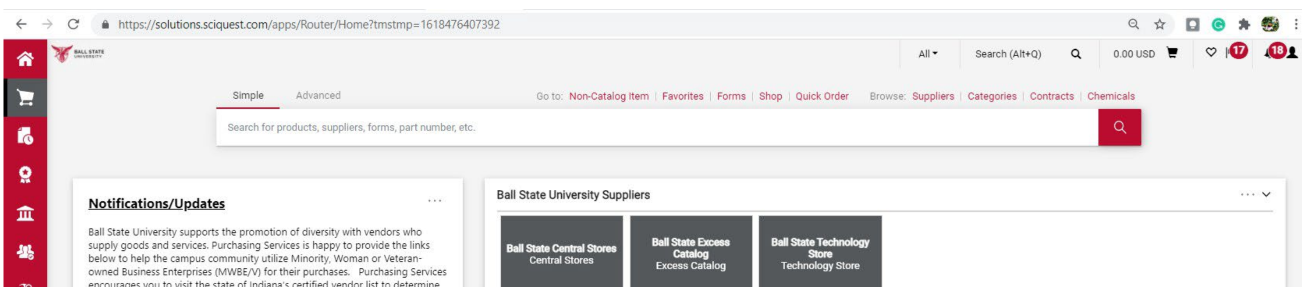
Contents

JAGGAER Homepage

Catalog types

1. Similar to other online shopping sites; you will search for products, add them to a cart, and then submit a purchase order (PO) to buy the products. In JAGGAER there are three types of catalog categories you will use. You will notice the three types of options.
    1. Ball State University
    2. Showcased Suppliers
    3. Moving, Storage and Inventory Forms
    4. Purchasing Services Request Forms
    5. Payment Request Forms



In JAGGAER there are three types of catalog categories

Hosted Catalogs: includes products from authorized suppliers. You can search for products from within the purchasing system.

Punch-Out Catalogs: includes authorized suppliers and the suppliers maintain the catalogs directly.

Non-Catalog: items include products or services from suppliers who do not maintain catalogs within the purchasing system.

Product or service information is entered manually. To select an item enter the product or SKU number, description, quantity, and price for the item or service you are purchasing.

You can search for the suppliers, but if the university has not purchased products from this supplier within the **past 12 months**, you will not find them in the system. You will need to submit the "New Supplier Request" form.

Home page

Taking actions on the Homepage can be done by clicking on icons on the left or by clicking on the items in the upper right hand corner (see above). Items in the upper right hand corner include the following:

a. **Quick Search**

After clicking on Quick search, a dropdown appears and it defaults to “All items”. If you type a PO#, RQ# or Invoice # the items appear in a dropdown for you to select. Hint: when searching for PO# you only need to type the number.

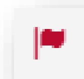
b. **Shopping Cart**

This allows you to view all items in your cart. You can trash items from the dropdown, and manage your Shopping Cart.

c. **Favorites**

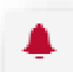
Displays your personal bookmarks and site bookmarks.

d. **Action Items**



Items assigned to you for approvals that require action.

e. **Alerts**



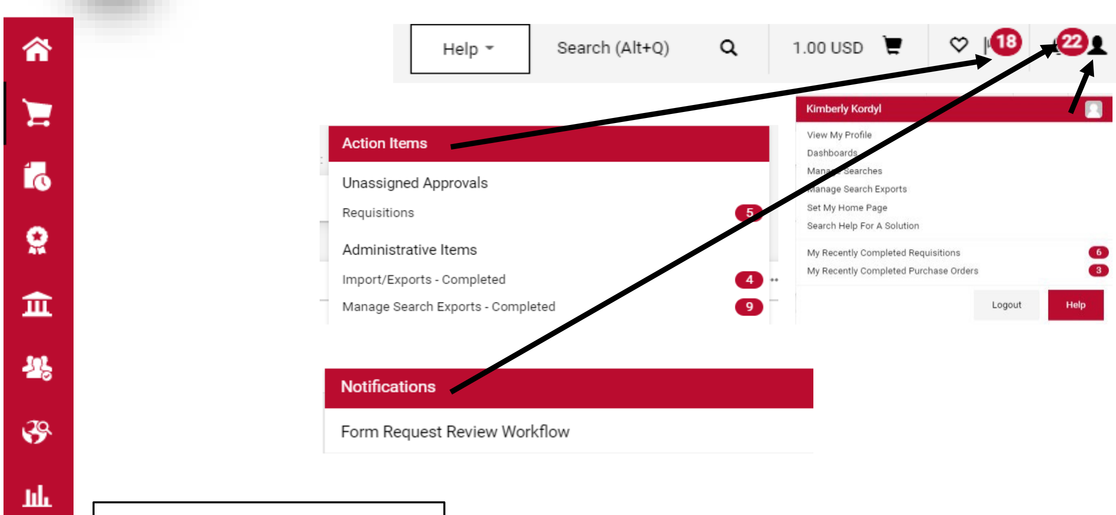
Notifications to you in regards to actions that are being taken. Alerts are managed in “My Profile”.

f. **Help**

Provides help on JAGGAER Navigation. It includes all of JAGGAER’s features. Note: some features Ball State University might not be using.

g. **User Profile**

Gives you access to “My Profile” and your pending or completed requisitions. This is a quick and easy way to find them.

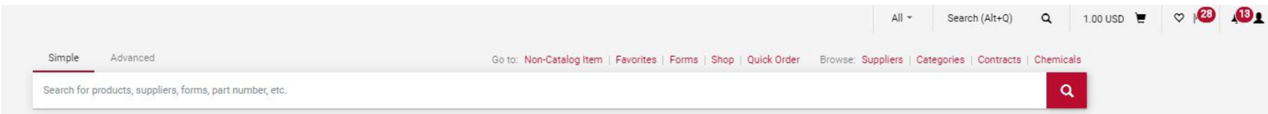


Left Side Navigation Bar

Shopping

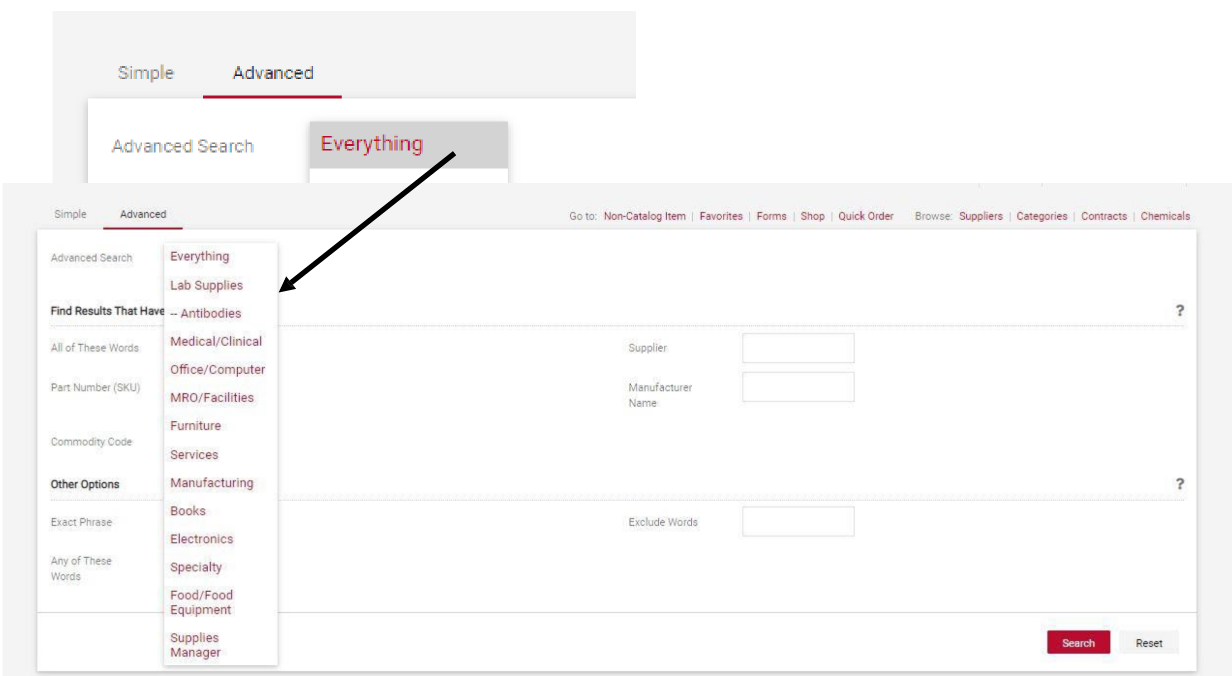
Simple Search

A user can search two primary ways for a product. A basic or simple search provides a "Google-like" experience. All of the words entered in the keyword text box must be found in the items displayed in the product search results. When a simple search is performed, to find the most relevant search results, the system searches many different things.



It is generally more effective to select the "Advanced" search or utilize filters after you have completed your simple search. This will help to focus the search and limit the results. When utilizing the Simple or Advance searches you will not see items from certain suppliers because they have live pricing (to ensure we get the best price). B&H photo, Office Depot, CDW-G, Kirby Risk, Wayne Pipe & Supply are examples. Ball State University has also identified categories on each Showcased supplier so you know what supplier to utilize.

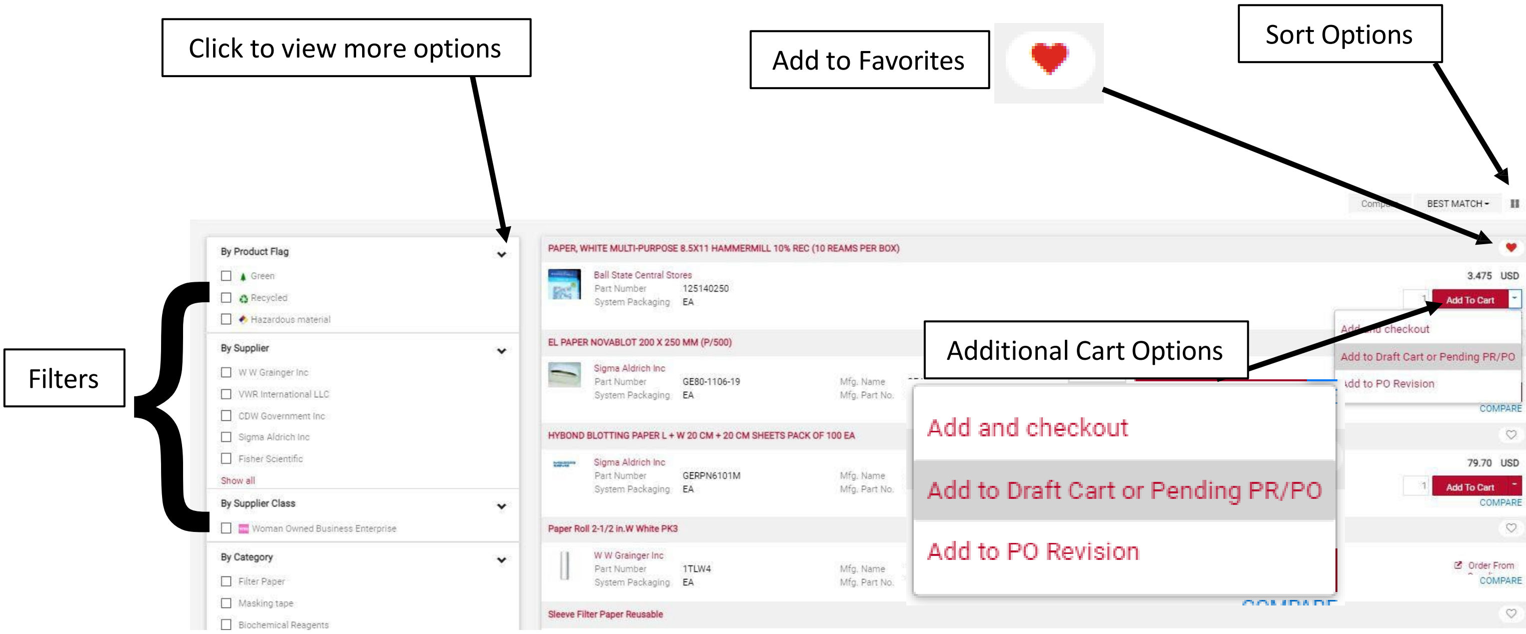
Advanced Search Bar



Return to Index

New Shopping Screen

Add sort options and hide option on left side



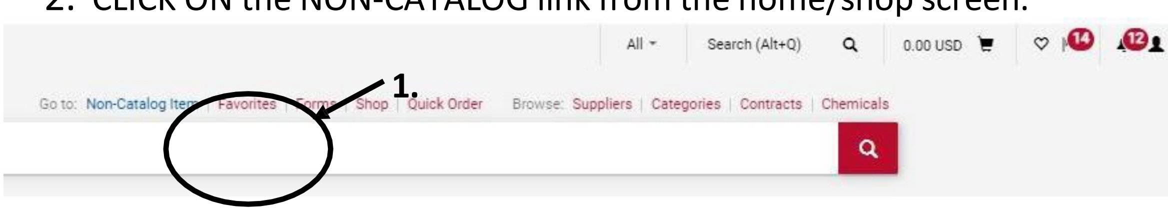
Non-Catalog in JAGGAER

Non-Catalog items include products from vendors who do not maintain hosted catalogs within the purchasing system, also for purchases of goods and/or services from companies who are awarded bids for unique products/specialized services.

To order a non-catalog item you will need to enter a product description, catalog number, price, manufacturer name, and part number for the product being ordered. You can also enter a detailed description, supplier, and price for the service.
The more information entered, the more it will help keep you from ordering the wrong product.

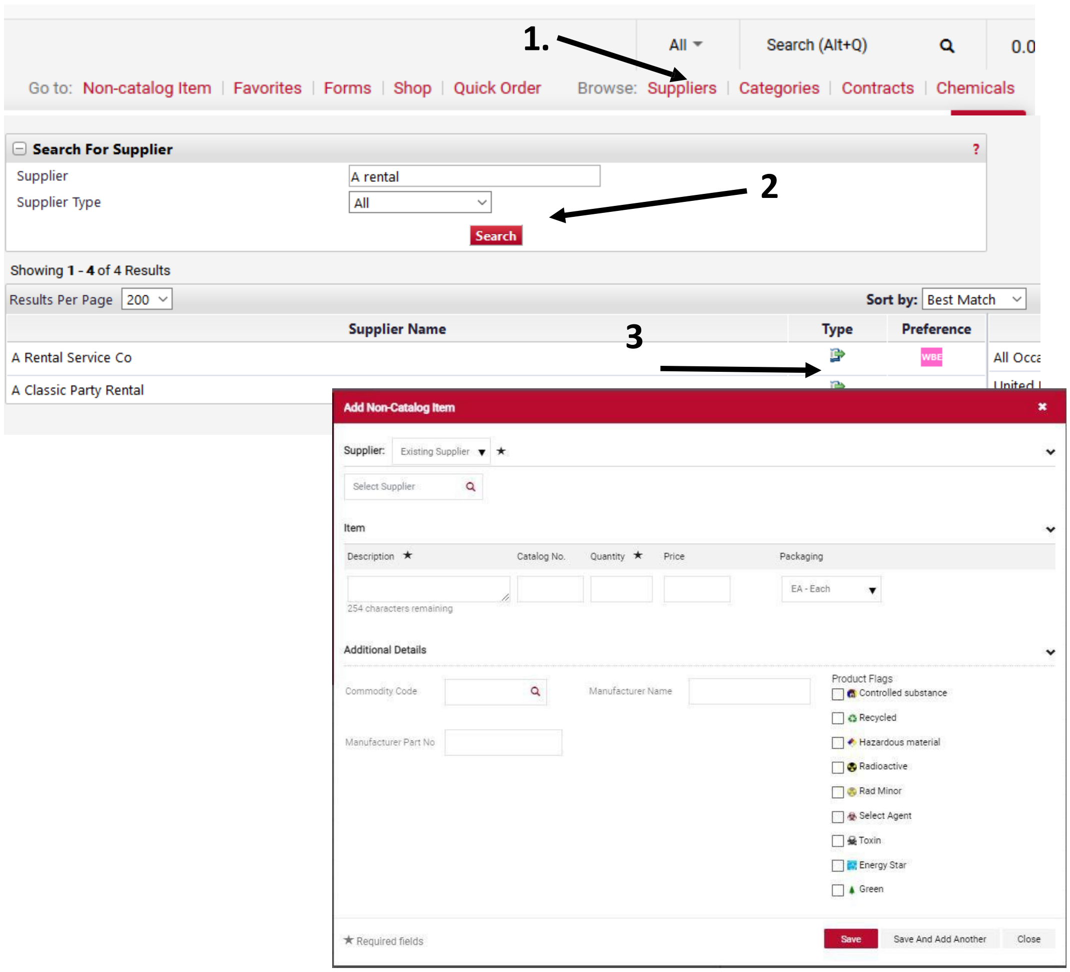
You can access the non-catalog entry form from various points on the Storefront and the Shopping Cart.

2. CLICK ON the NON-CATALOG link from the home/shop screen.



Return to Index

3. Select Non Catalog after Selecting your Supplier



Note: Regardless of each option, if you cannot find the supplier you are searching for, you will need to complete a Supplier Request form first. After the supplier is made available, you can then continue with your Non-Catalog order. Remember, only suppliers used within the past 12 months will be made available. When selecting a supplier you should utilize the default PO and default AP, unless you need to select a different address based on your payment.

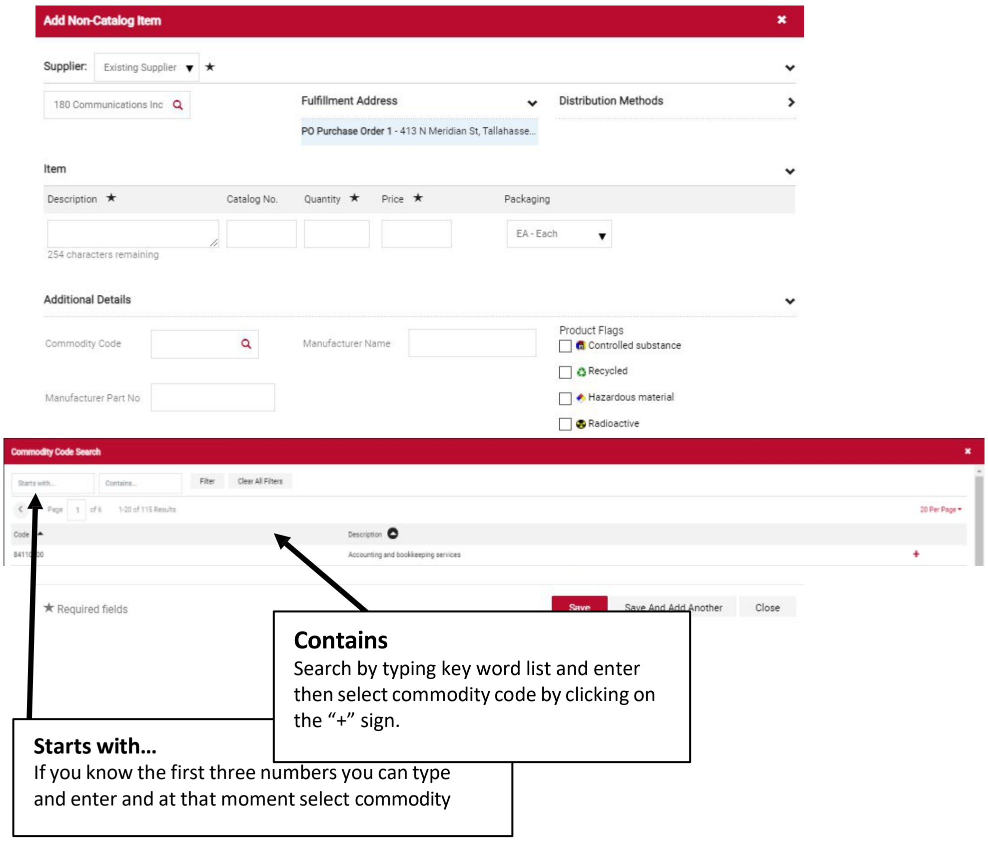
3. In the Non-Catalog window, ENTER details about the product in the fields provided.

   a) **Catalog No.**— Optional. You may enter the SKU or product number here.
   b) **Product Description**—include a SKU or product number and a brief description of the product or specialized service you are purchasing. There is a 255 character limit.
   c) **Quantity** — Enter the quantity amount you want to purchase.

Return to Index

d) **Price Estimate**—Enter a cost for the product. The amount you enter here will be multiplied by the quantity.

e) **Packaging**—Select a packaging option from the menu of choices relative to how the item(s) you are purchasing are packaged.



4. You must select a Commodity Code to further describe the type of product you arepurchasing.

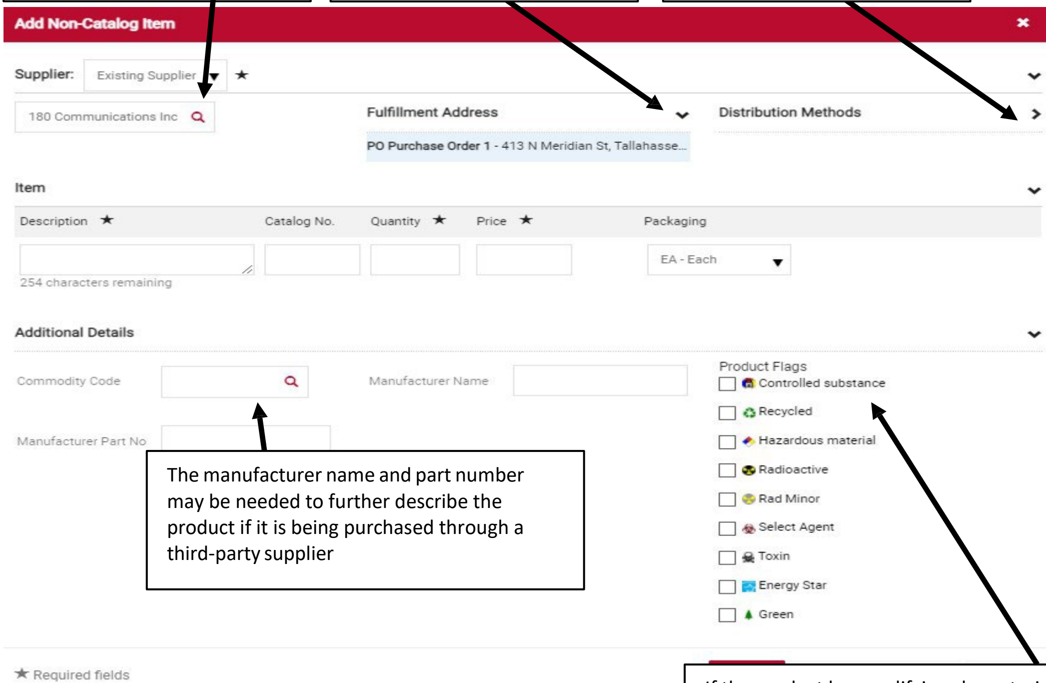
This information will help the University collect information about the types of purchases made annually. The Commodity Code selected will determine which Ball State Purchasing Agent will review (if order is greater than $1,000).

Selecting an accurate commodity code is important. When choosing a code, think about the broader category the product you are purchasing may fit into if you were looking for it in a store. To select the broader category the product you are purchasing would logically fit into, click on "commodity code" to find a complete list. We have provided a list of "Key Words" to help you with this as well.

Supplier Search or if you know the name you can type the supplier name and then select from list

Fulfillment Address is where the PO address, which is usually the physical or mailing address for this supplier

Distribution Method is how PO will be sent to supplier. If this needs changed a supplier request for will be needed



The manufacturer name and part number may be needed to further describe the product if it is being purchased through a third-party supplier

If the product has qualifying characteristics, you must check the appropriate box which best describes its category type so proper handling and security measures can be made for its delivery, storage and disposal.

Return to Index

5. Select SAVE to add the item to your cart. It can be found on the bottom right hand corner.

6. After you have reviewed your cart and are satisfied with it, you can choose to view your cart or select CHECKOUT. Viewing your cart is good way to verify you have not combined your cart request with a 0form request. Combining different types of forms from Showcased Services or mixing Ball State University catalogs with other suppliers will delay your requests.

7. If you forgot to add a commodity code, the system will prompt you to enter one, you can enter it on this screen or the CHECKOUT screen, however if there is any information that is incomplete, the system will present you with a red warning that this is a "required field."
   Select the magnifying glass to search for a commodity code.

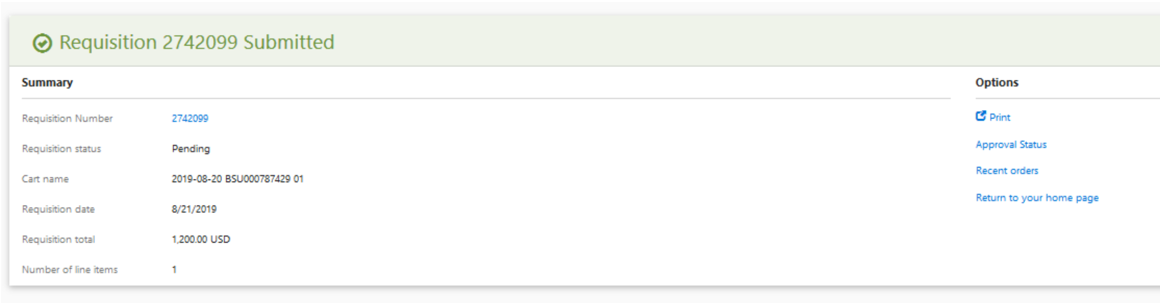
   To view PR Approvals before submitting click on "What's next for my order?" to view approval steps. Requisitions also have the ability to add INTERNAL/EXTERNAL Notes and Attachments. Refer to attachments to learn how.

8. Once required fields are completed and verifications made, select SAVE

9. Select PROCEED TO CHECK OUT.

   The action taken on Step 9 will confirm that your request has been accepted by the system and it will provide you with a requisition number. If you click on the blue link for a requisition number, it will allow you to open the requisition. This indicates that your order has been confirmed. You will receive a confirmation notification that your order has been accepted by the system. The confirmation will show in your email notifications.

You will also have other **OPTIONS** such: **Print**, view **Approval Status**, **Recent Orders** or **Return to home page**. Simply click on the appropriate action.



Return to Index

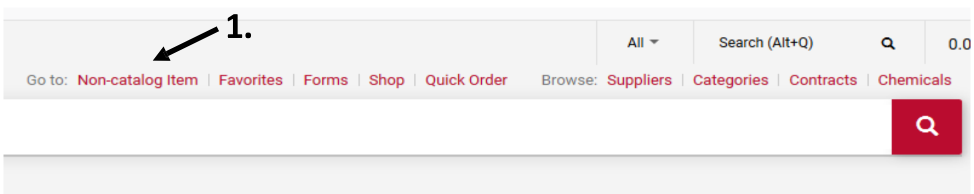
Completing a Standing Order

Non Catalog items on a Standing Order should be for purchases of goods and services on an annual subscription basis and/or repairs for contracted services.

First, you will need to setup Standing Order items or services as a Non-Catalog purchase. Most Standing Orders are based on a Fiscal Year, but can be based on the time of the contracted service.

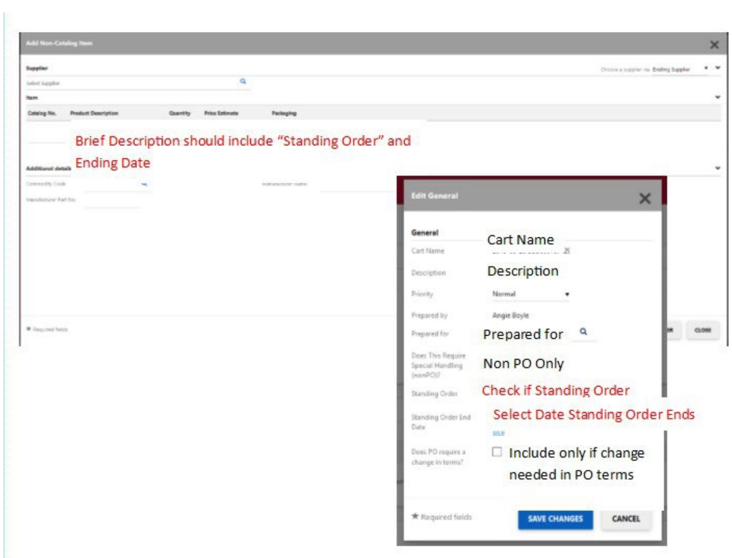
Completing a Standing Order

1. Select “Non-Catalog item” from the JAGGAER Home Page



Completing a Standing Order

Complete “Non-Catalog” orders just like the example above, except “Product Description” should include the words “Standing Order” and an ending date. You should also select “Standing Order” and enter end date under the “General” section on your requisition. You can access this by clicking on the pencil.



Return to Index

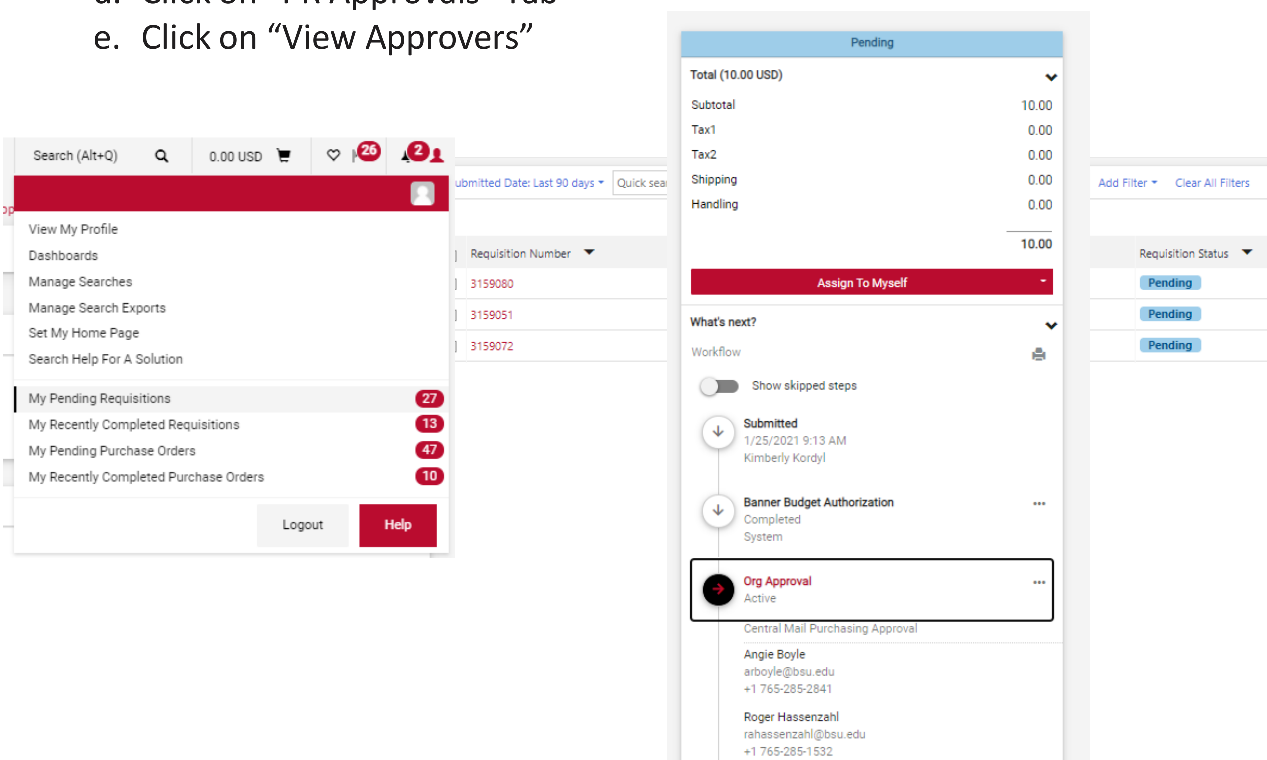
NOTE: If the supplier you need is not listed, you will need to complete a "Supplier Request Form"

Requisition Approval Status

There are multiple ways to find Pending Requisitions.

Requisition Status Key	
	Pending
	Completed
	Out for Bid
	Rejected
	Withdrawn
Returned To Requisitioner	Returned

1. My Pending Requisitions
   a. Click the person icon in upper right hand corner of the screen
   b. Click on "My Pending Requisitions"
   c. Click on "Requisition Number"
   d. Click on "PR Approvals" Tab
   e. Click on "View Approvers"

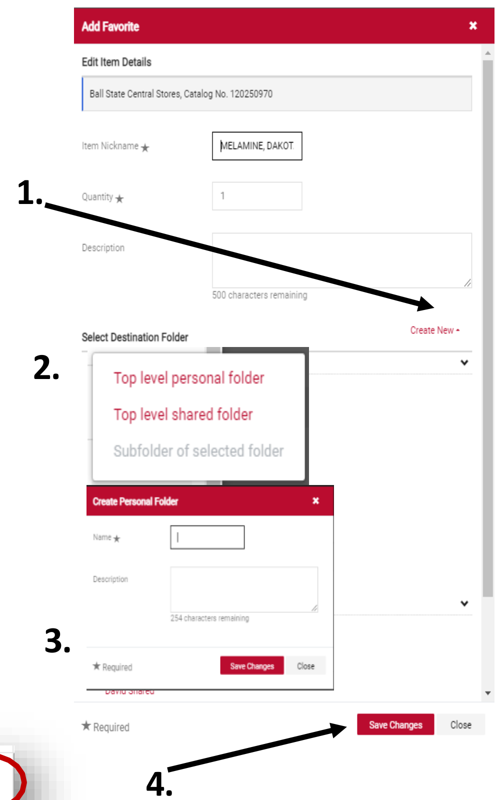


Return to Index

How to Utilize Favorites

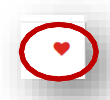
Using shopping favorites will stream line your shopping experience, and reduce search time for selecting items in the future. Once you have located your item, we suggest if it is something that you order often, that you add it to your favorites list for future orders.

To create favorites you must first create a folder and then
Select the item you want to add as a favorite.



a. Select "Create New"
b. Select "Top Personal Folder"
c. Name the folder: "**Shopping Favorites"**
d. Then select "Save Changes".
e. Users can have one general folder for favorites or multiple folders for different suppliers.
f. When adding a new item to a folder, select the favorite's folder that you have created previously, by selecting title of folder to place the item in from the favorites list.

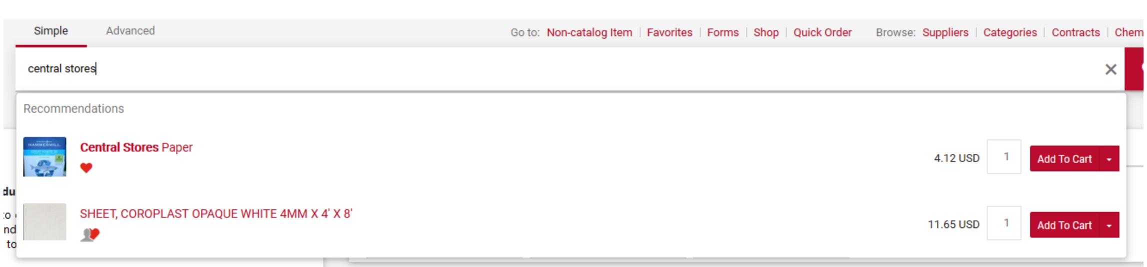
Adding Shopping favorite:



1. To add an item to the favorites list select the heart option in the top left hand corner of the product window.
2. Create or select the Favorites folder to save the favorite item.
3. Select a folder to save the favorite in by selecting the Folder name.

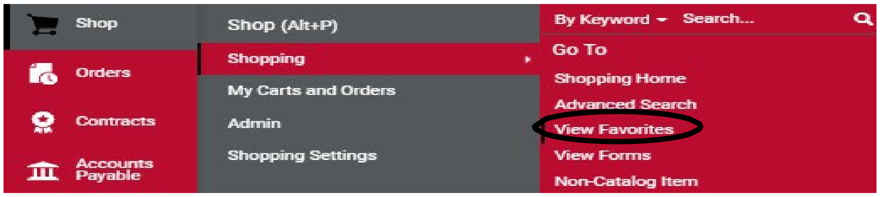
Selecting Shopping favorite:
To Select favorites when shopping:

1. Go to General "Search bar" at top of showcase and type key word filter.



Return to Index

2. Shop items from favorites list by going to :
   Side Navigation bar>ShopingCart>Shop>View Favorites

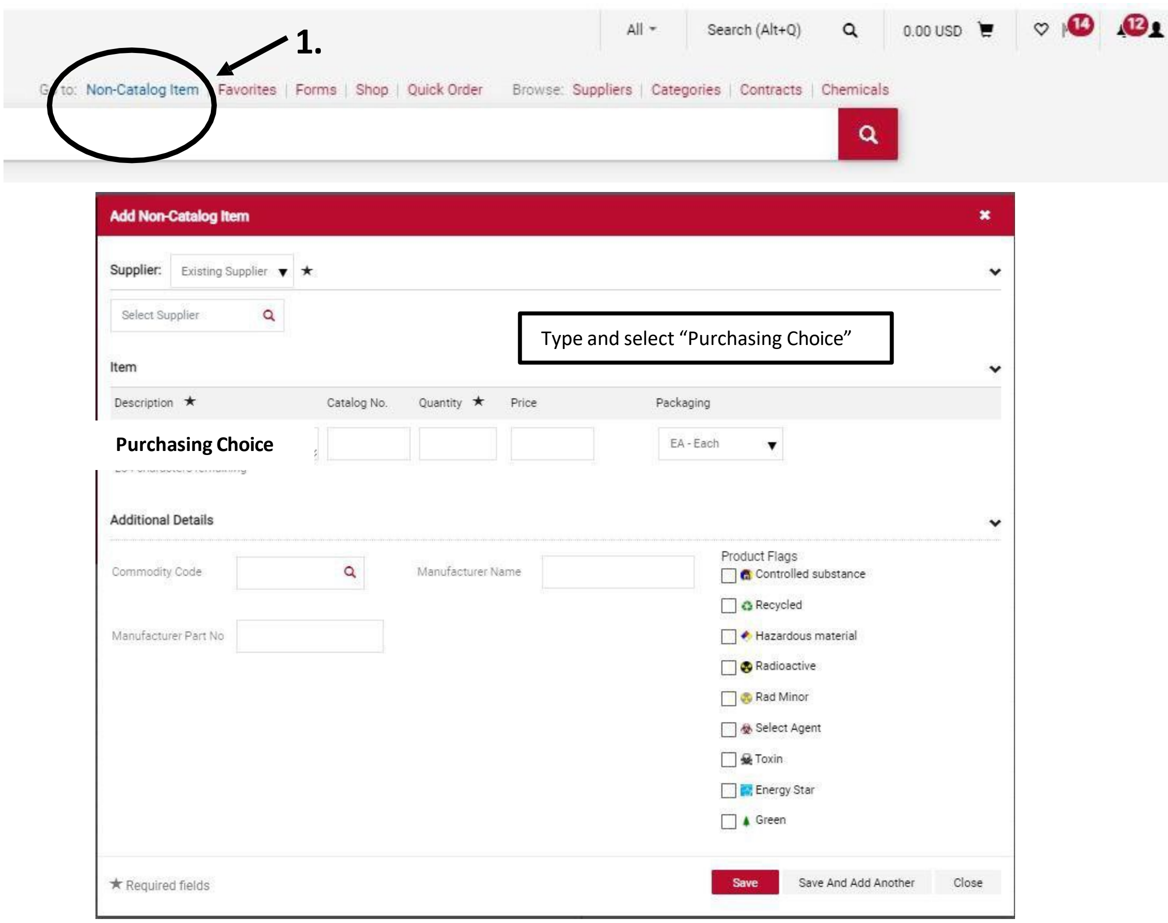


Purchasing Choice

If you know what item you would like to purchase and do not know where to purchase the item from. This feature is should only be utilized for Purchase Orders that are greater than $1,000.

To utilize this feature please follow the directions below:

CLICK ON the NON-CATALOG link from the home/shop screen.



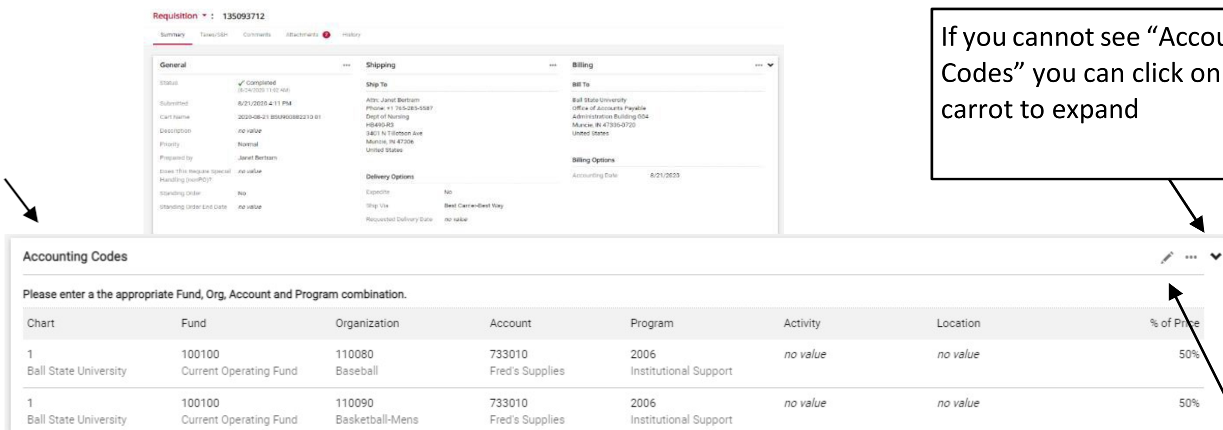
Complete the Non-Catalog items you are requesting to purchase.
Include as much information that you know about each item to ensure that our Purchasing Agents know what item is being requested. Once the requisition is routed

to a Purchasing Agent, they will review the item, select the appropriate suppliers, and send out for a quote if deemed necessary.

Accounting Code Splits

Account Code Split by Header

Utilizing what JAGGAER calls a header is the FOAPAL information that is listed under the “Accounting Codes” section. Any account information listed in the in the header section will apply to all items listed on the requisition.



If you cannot see “Accounting Codes” you can click on the carrot to expand

Click Pencil to Edit Account codes

My Profile

User Cart Notification Settings

1. SELECT User Profile, please refer to Viewing User Profile

2. SELECT User's Name phone number Email etc. option listed in profile

3. SELECT the Shopping Carts & Requisitions in the Notification List.

    a. Click on "Edit Section" next to pencil

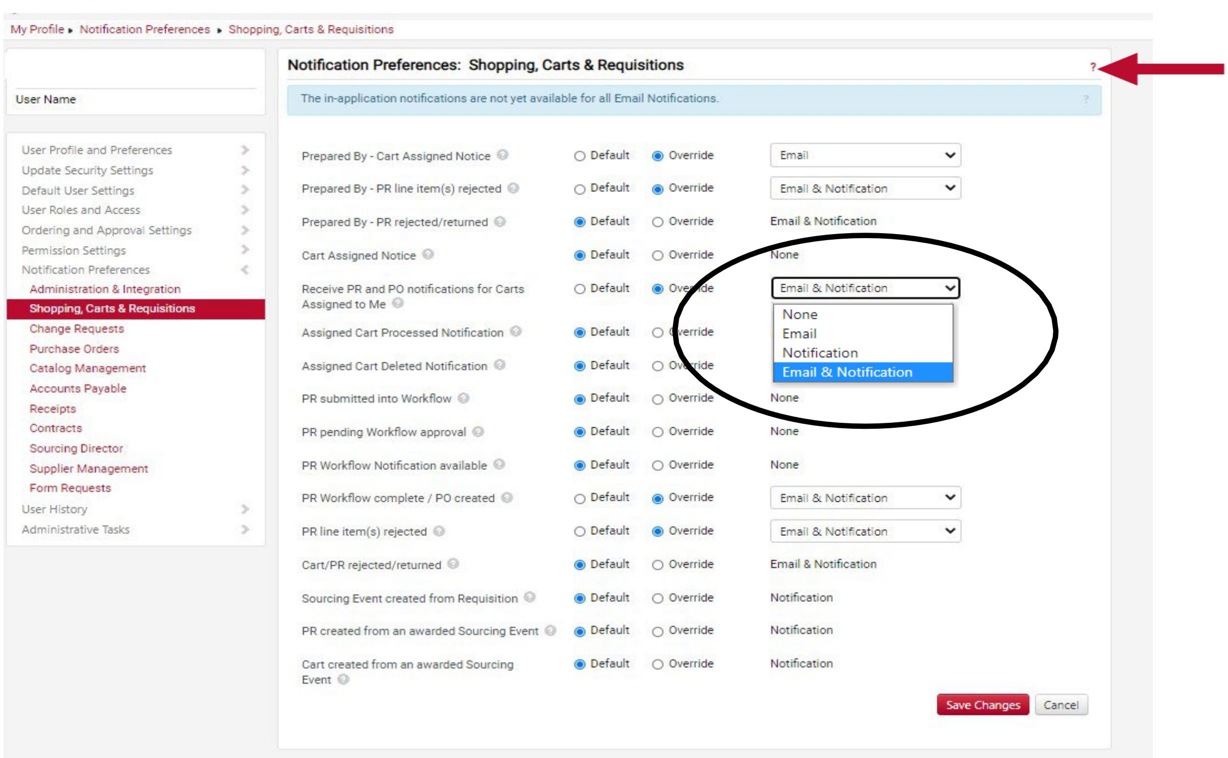
    b. Select from your Code Favorites Select appropriate Notification option: None, Email, Notification (Just within JAGGAER, Email

4. SELECT User Profile, Please refer to Viewing User Profile

5. SELECT User's Name phone number Email etc. option listed in profile

6. SELECT the Shopping Carts & Requisitions in the Notification List.

    a. Select "Edit." Select from your Code Favorites. Select appropriate Notification option: None, Email, Notification (Just within JAGGAER, Email and Notification within JAGGAER)



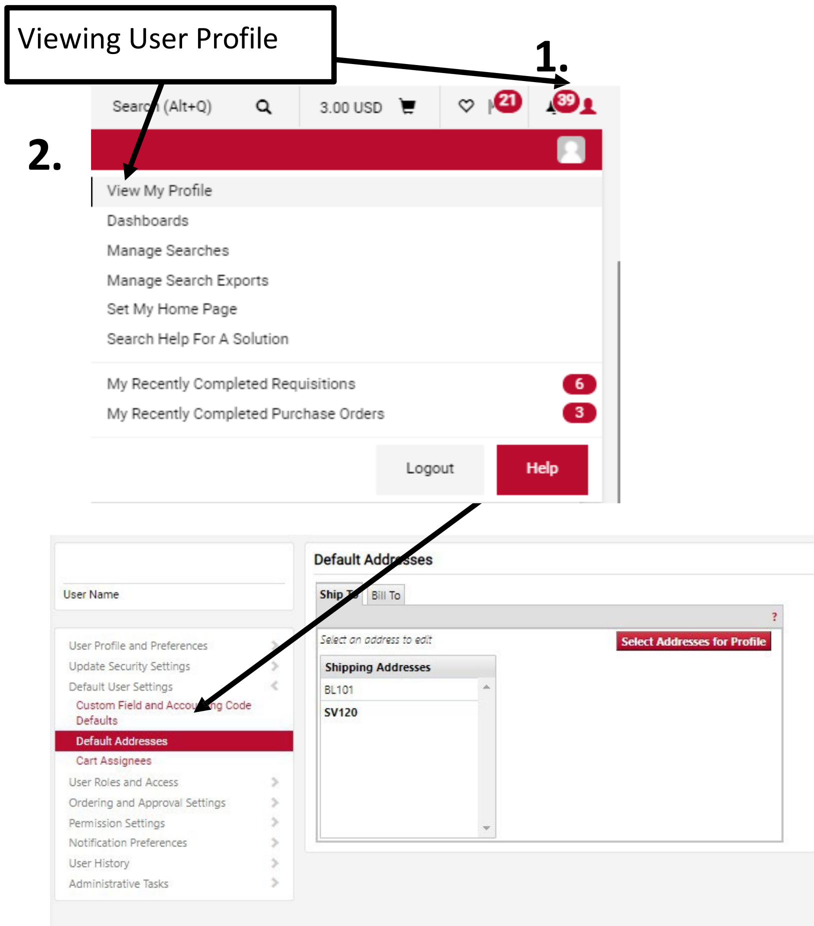
Return to Index

Set User Default Ship To Address

Search for an address

1. SELECT user icon to far right

2. SELECT ‘View My Profile’



3. From the menu, choose ‘Default Addresses’

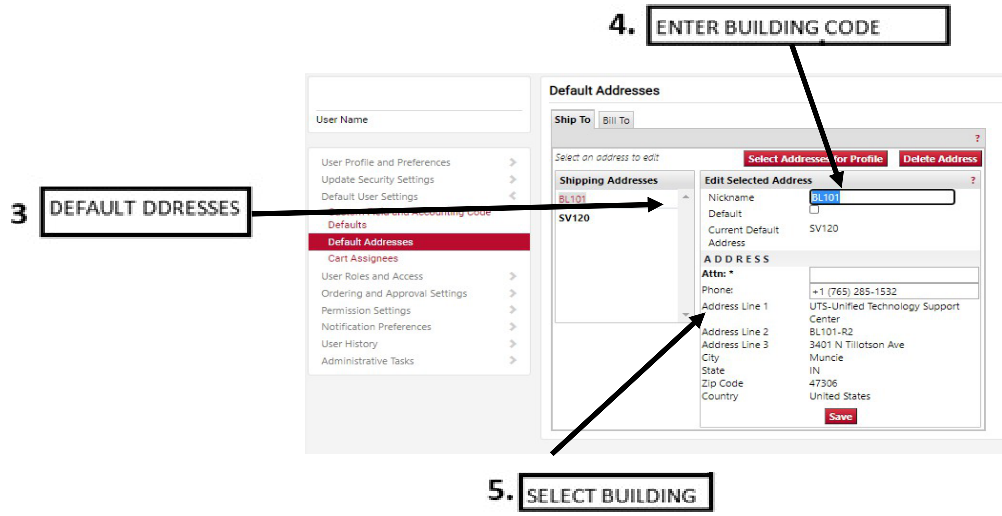
Saving your default shipping address

4. SELECT ’Addresses for Profile’

5. ENTER a Building Code/Room Number in the empty text filed labeled, Nickname/Address.

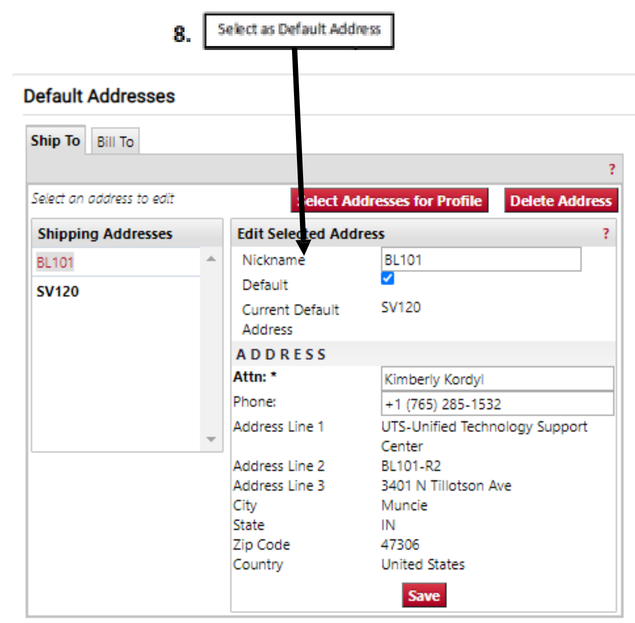
6. SELECT Search

7. SELECT the address from the returned results. You may need to click through pages of result to find the needed address.



8. Now, SELECT the checkbox to set this address as a default.

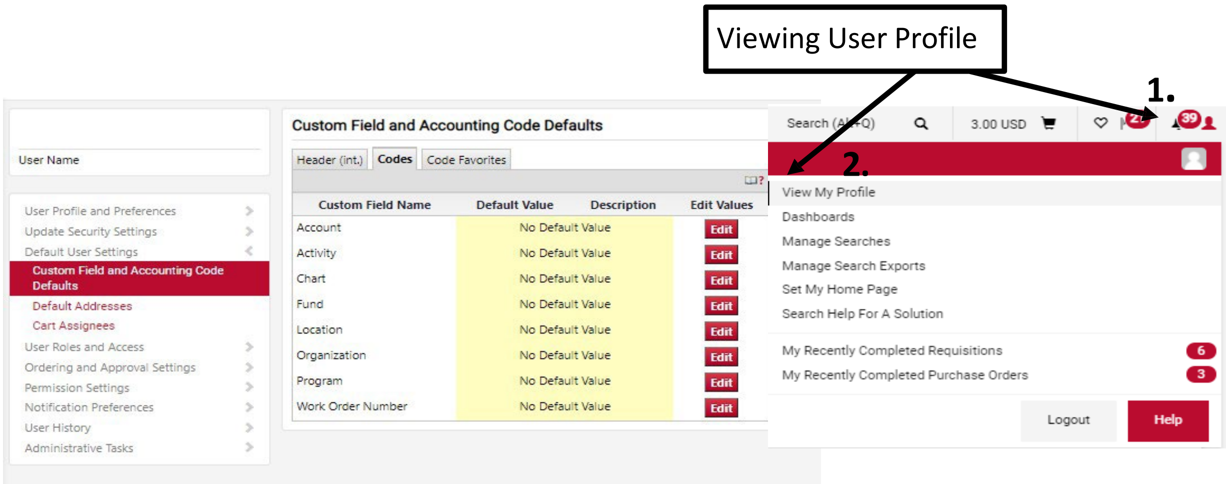
9. Next, SELECT Save



Set User FOAPAL Defaults

1. SELECT your View User Profile Icon

2. SELECT View My Profile



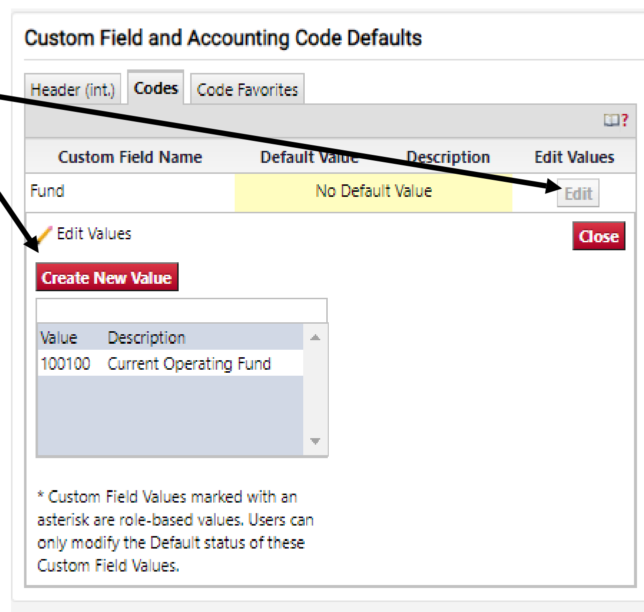
Default Account Code creation

3. SELECT the **Edit Button**

4. Next, SELECT "**Create New Value**"

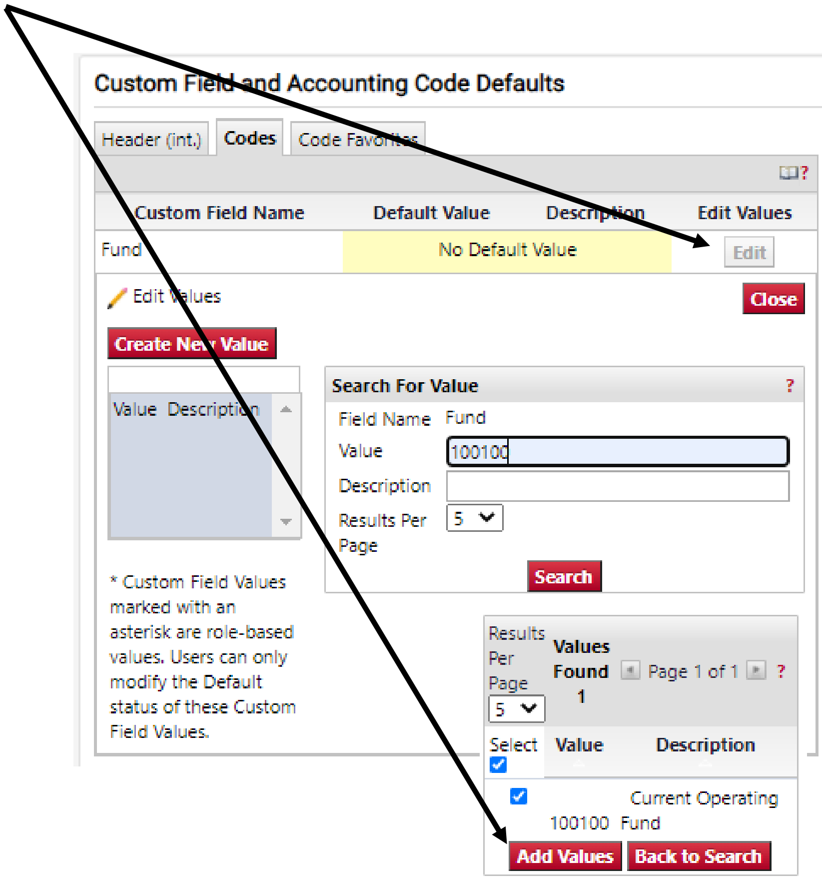
5. Enter a value or Description and then click **Search**.

6. SELECT the box aligned with the account code value by checking boxes, and then select **"Add Values"**



Return to Index

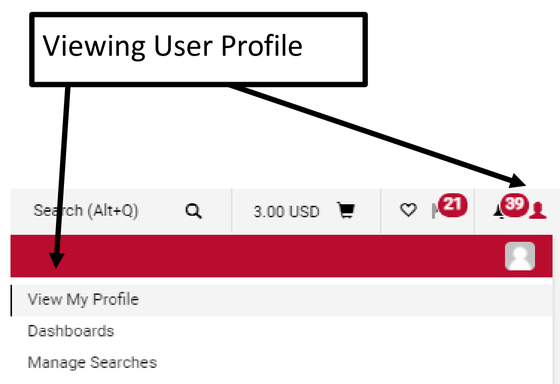
7. SELECT the box aligned with the account code value by checking boxes, and then select "Add Values"



Accounting Code Favorites

Code Favorites set-up

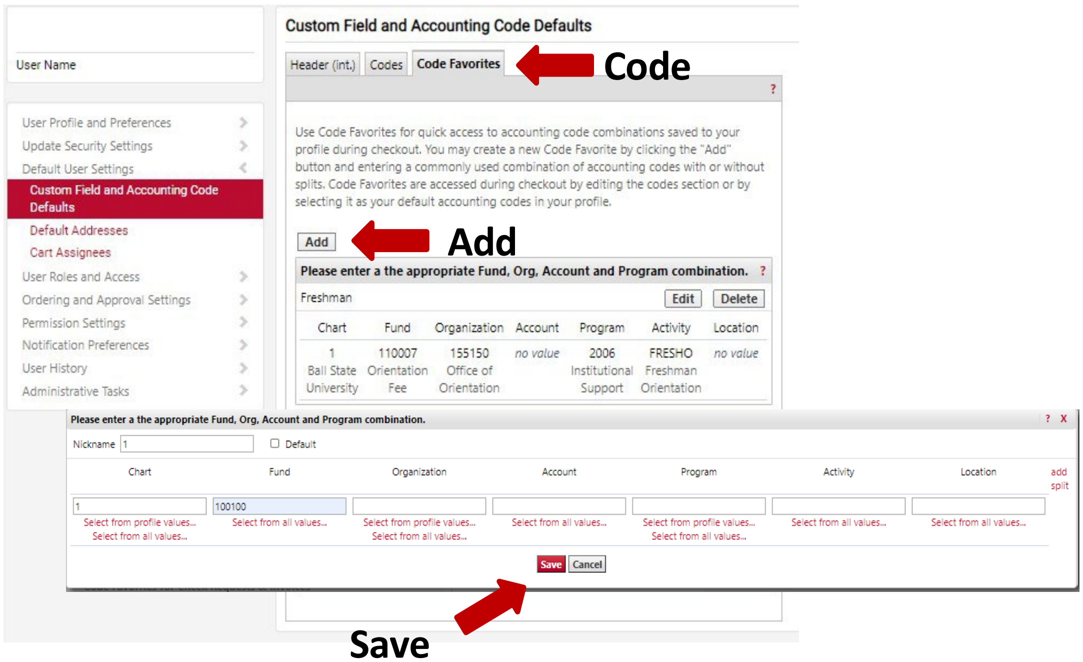
1. SELECT your View Profile Icon
2. SELECT View My Profile
3. SELECT Default User Settings
4. SELECT Code Favorites Tab
5. SELECT ADD button to initialize code favorite
6. Enter FOAPAL utilizing search function or manual enter.
   Please refer back to see a full list of Accounting Codes or Searching



Return to Index

for Accounting Codes.

7. Enter the Nickname for the Default User Setting Code.

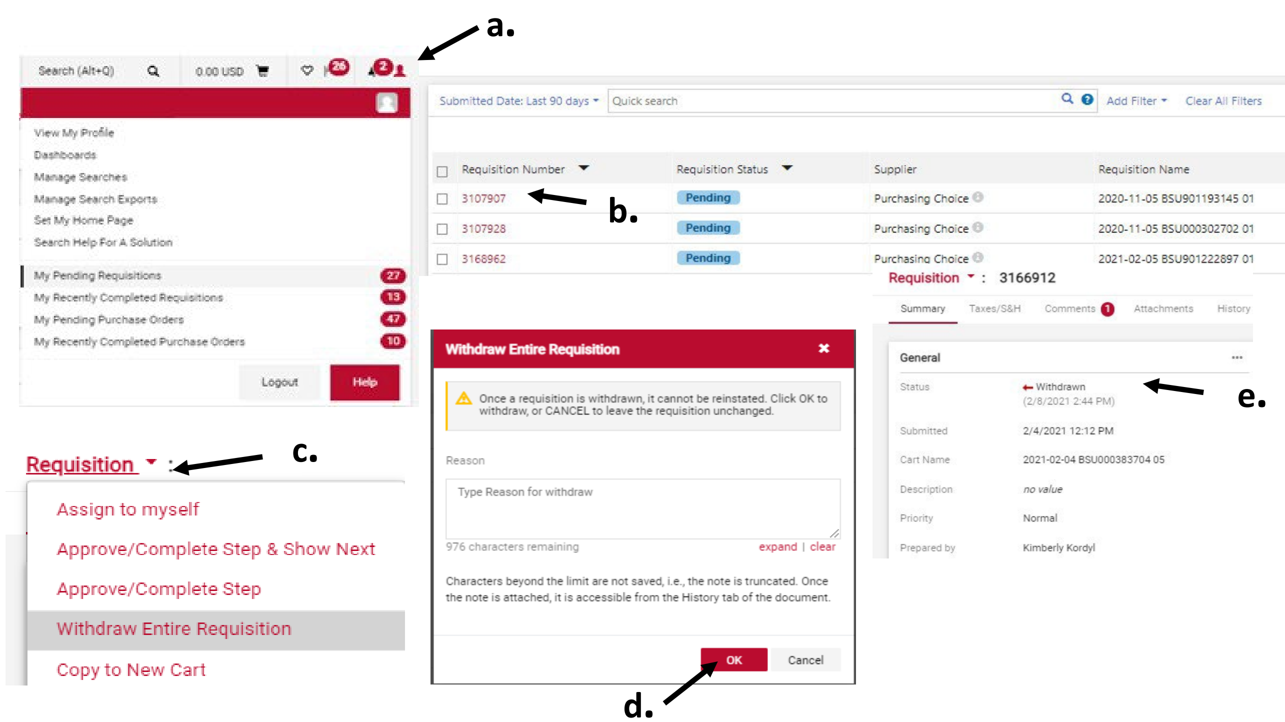


Return to Index

Withdrawing and Copying a Requisition

Withdrawing a Requisition

Requisitions only can be withdrawn by the requestor and can only be done if the requisition is pending. If the requisition has been assigned a Purchase Order number, Purchasing Services will have to close this Purchase Order.



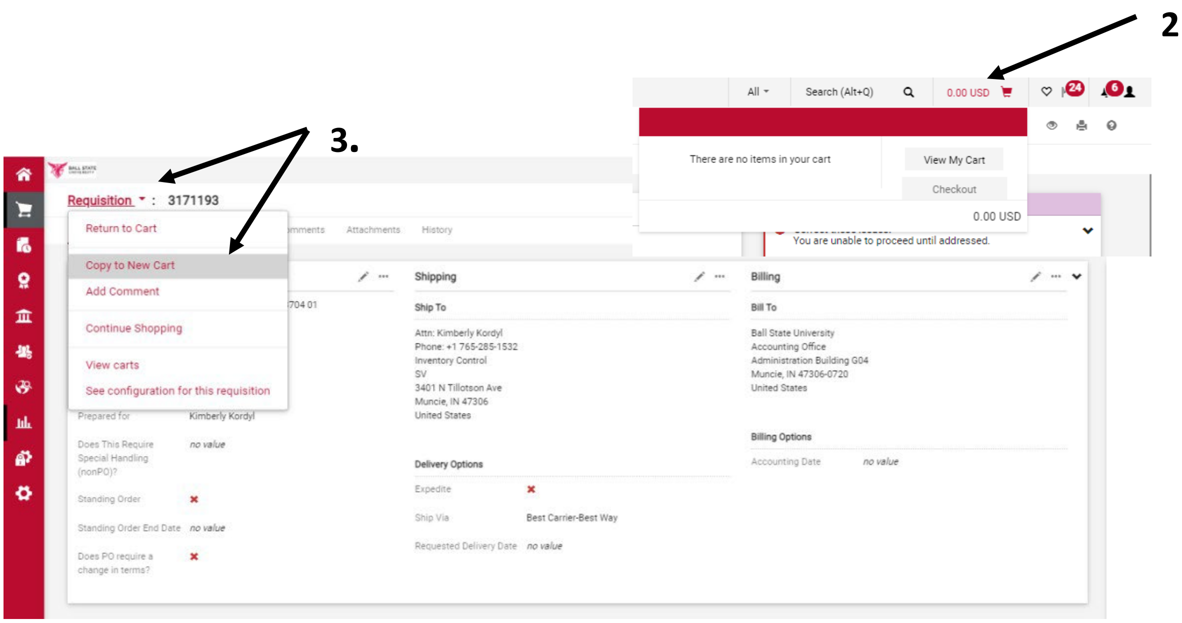
a) Locate the pending requisition by clicking on "My Pending Requisitions" or typing requisition number in the search bar.
b) Click on dropdown for "Available Actions" dropdown next to the "Down Carrot" button
c) Select "Withdraw Entire Requisition"
d) Type Reason for withdraw and click "ok"
e) On the requisition it will now say withdrawn

Return to Index

Copying a Requisition

We do not recommend copying any requisition that is older than six months.

1. Find the Requisition you want to copy
2. Make Sure the Cart is empty by viewing cart
3. Select Available Action, “Copy to New Cart”
4. Requisition you copied will appear in your cart so you can edit



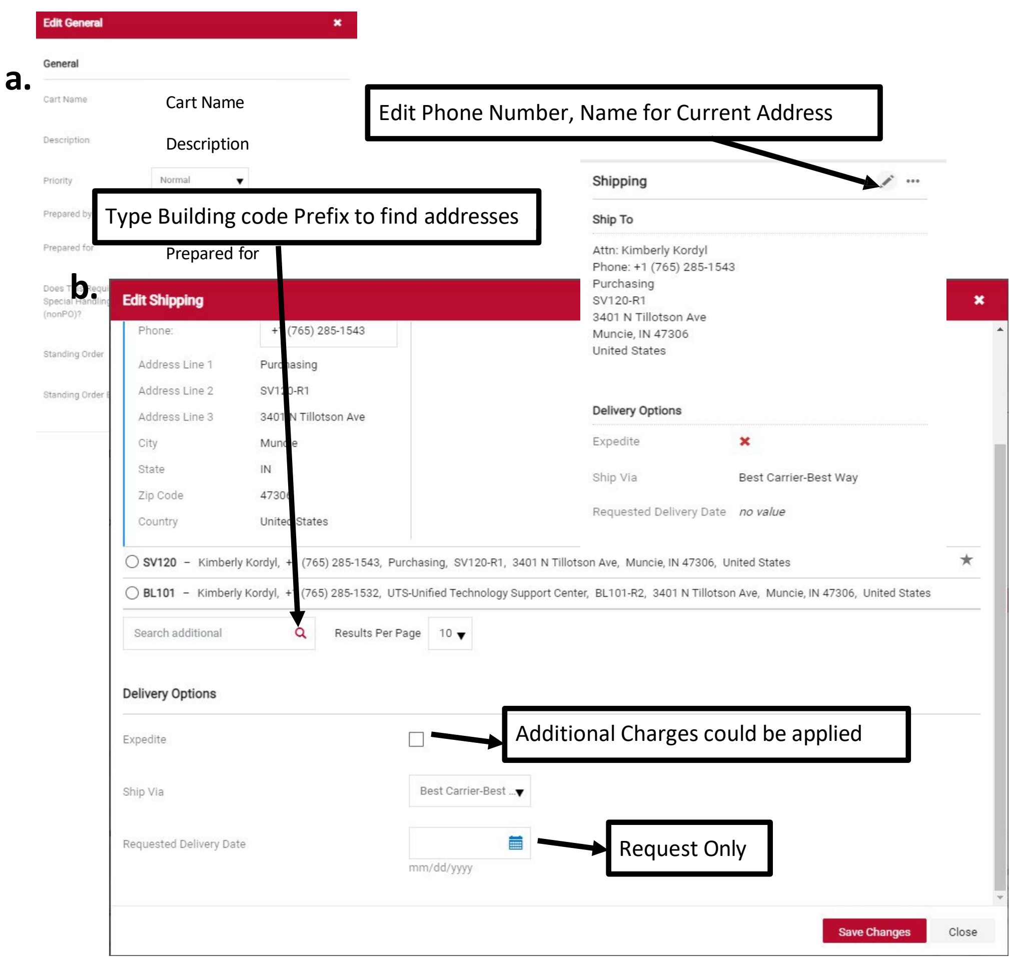
Customizing a Requisition

You have the ability to edit a requisition you are working on in the sections below.

You can edit the appropriate section by clicking on the in the right hand corner of each section.

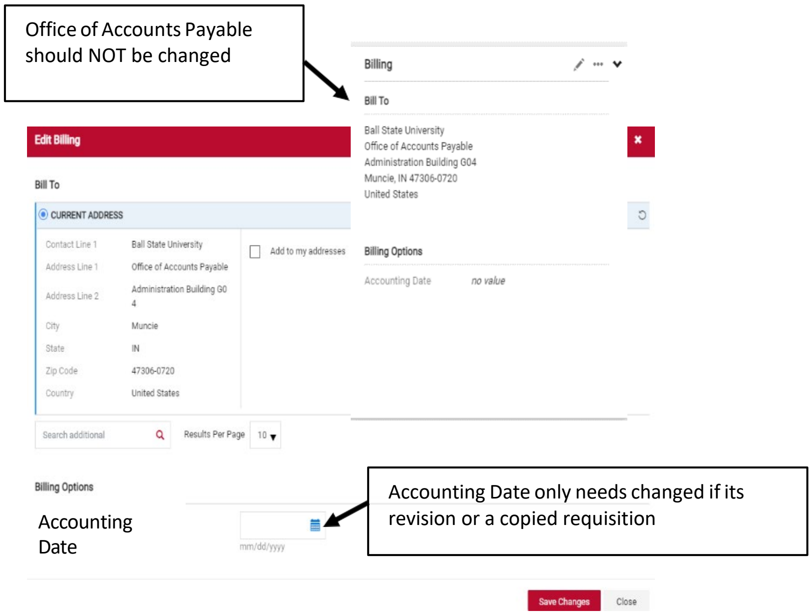
a. General -Cart Name, Description, Priority, Prepared for, Special Handling, Standing Order and terms.

b. Ship to- Shipping Address, Expedite, Requested Delivery Date

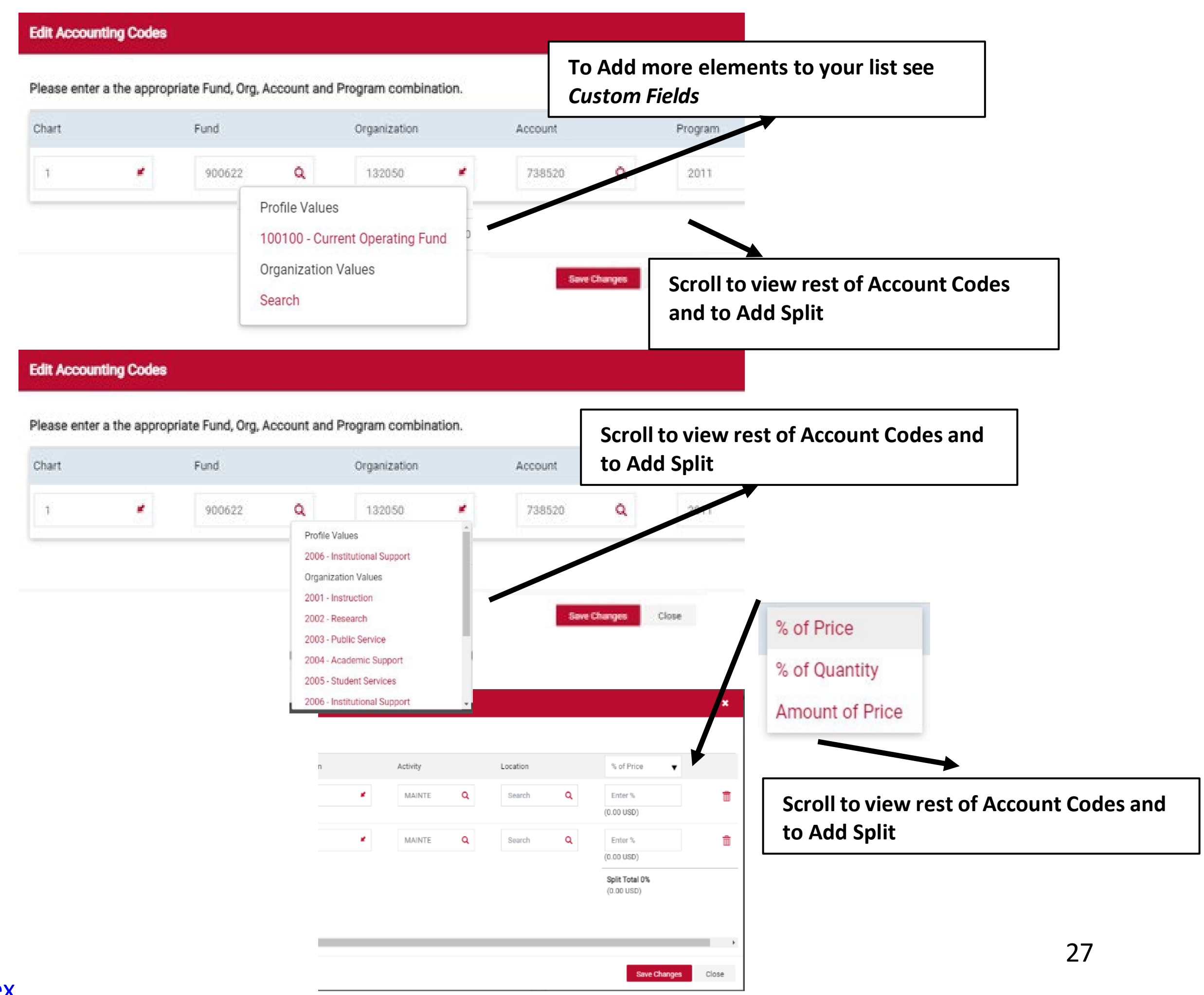


Return to Index

c. Billing – Ball State University Remit to Address should always remain as "Office of Accounts Payable"

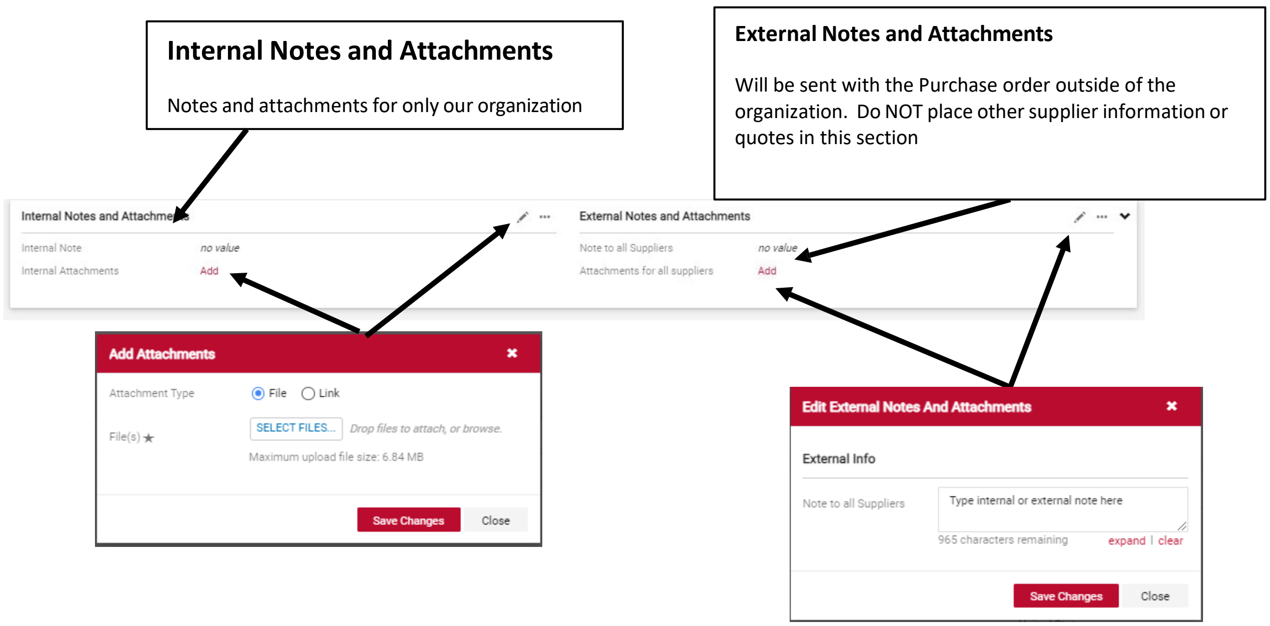


d. Accounting Codes – FOAPAL information, add splits, header information appears on every line in Requisition



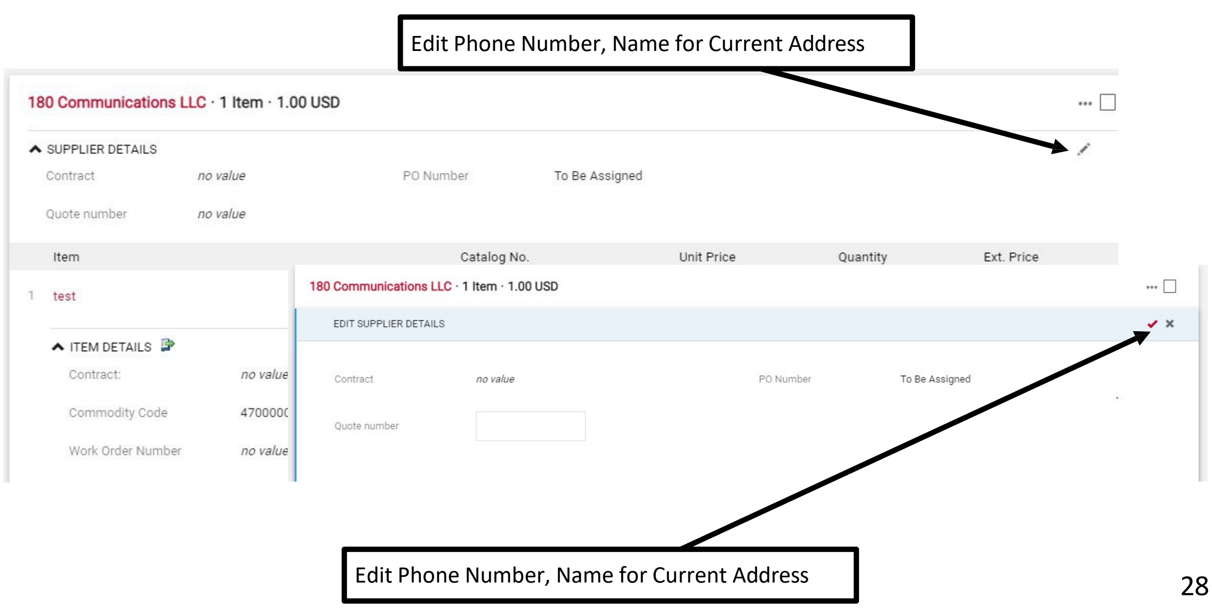
[Return to Index](#)

e. Internal/External Notes and Attachments-Items that you want suppliers to see should only be applied to External notes and attachments



f. Capital equipment and minor equipment cannot be combined in header and must be done by line

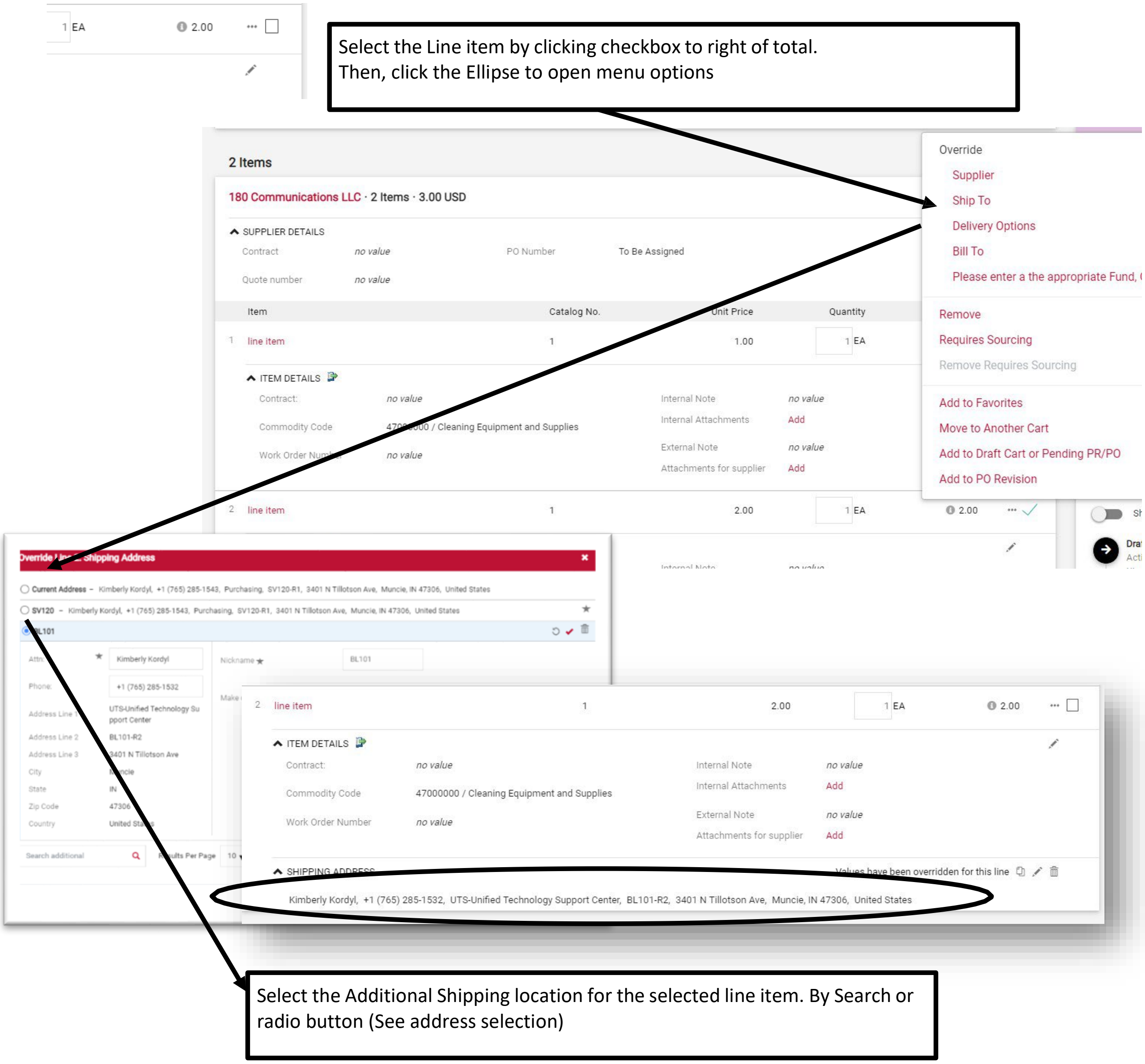
g. Quote Number If a vendor included a quote number you can enter the quote number on the line that applies



Return to Index

h. Shipping to Multiple Locations

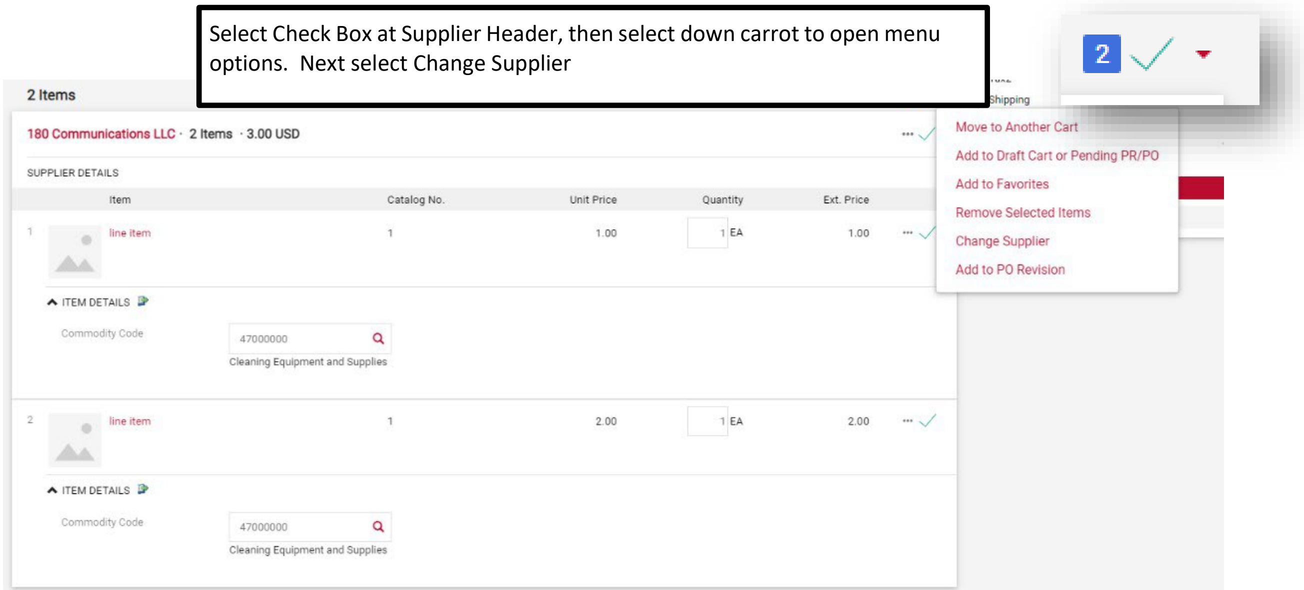
User has the ability to change the shipping information at the line level so that the shipment can be sent to multiple locations within one order.



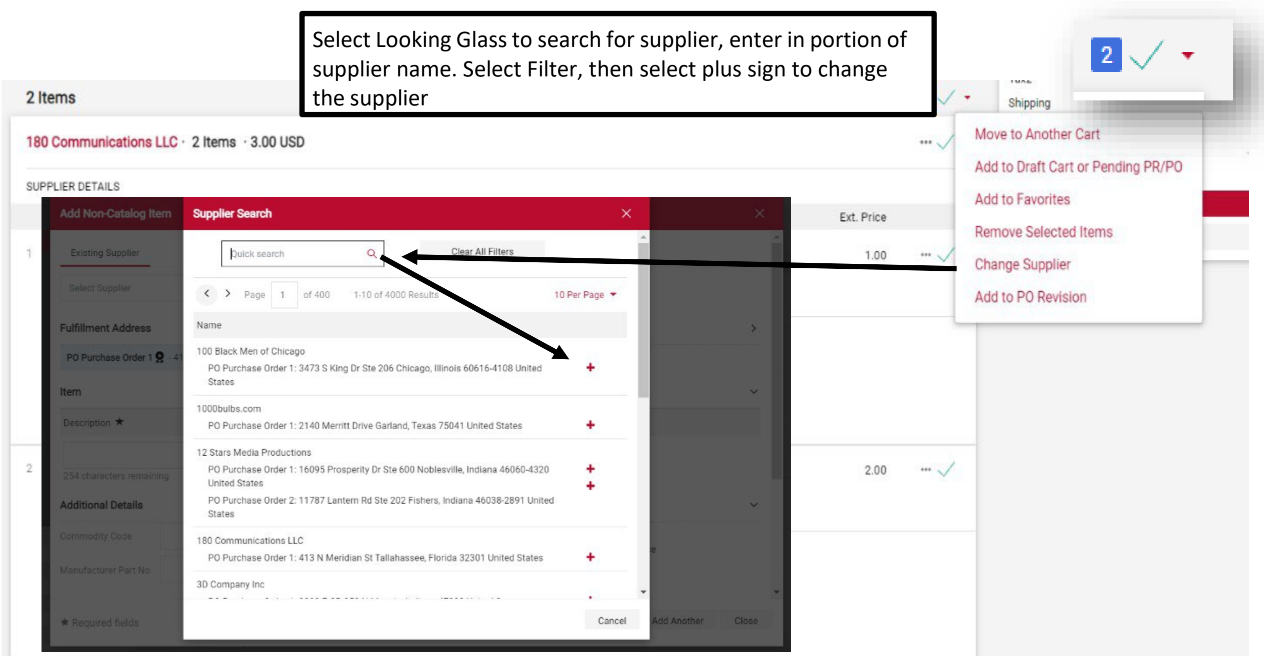
Return to Index

i. Changing Supplier

User has ability to change the selected supplier while in cart. You can also edit when an incorrect supplier has been chosen.



Requisitions can be edited, when completing the requisition or after copying the requisition. Note: Do not copy a requisition that is older than six months.'

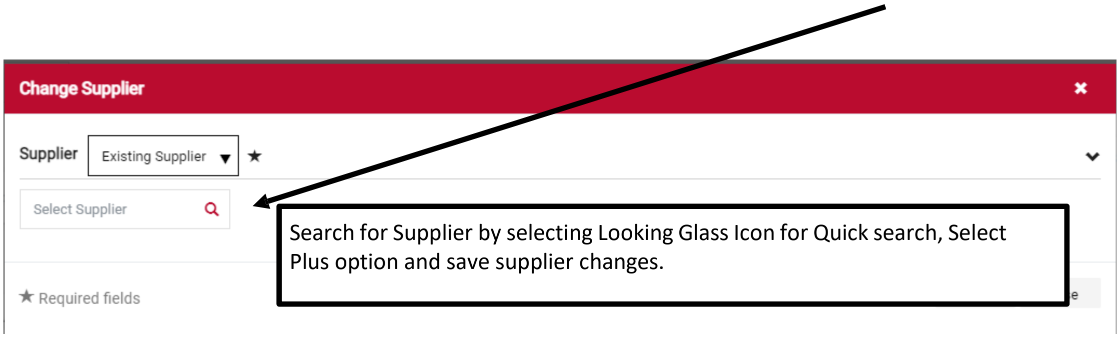


Return to Index

Managing Carts

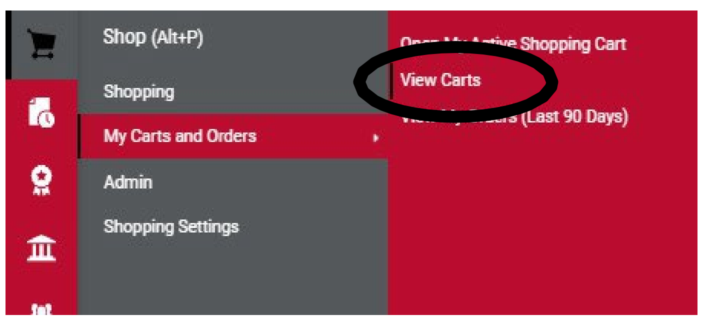
Managing Draft Carts

There are different methods to access Draft Carts. Returned Draft Carts will be located on the "Assigned Cart" tab within the Draft Cart area, if the cart has been returned.



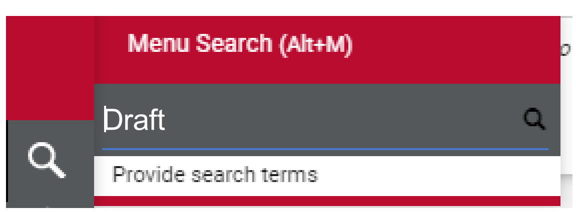
Method 1: Accessing Draft Carts using the Action Bar on the left side of the Showcase:

1. SELECT the Shopping Cart
2. SELECT My Carts and Orders
3. Then SELECT View Carts



Method 2: Accessing Draft Cart by using the Activity Bar located at top right of the showcase:

1. Select the Shopping Cart
2. View My Cart, this takes you into the current cart
3. Accessing Draft Cart using Menu Search (Alt+M) option, Type "Draft" and select "Draft Carts: from Menu



Suggestions for managing carts:

1. Do not use different vendors in one Draft Cart unless they are all "Showcased Suppliers"
2. Do not combine Ball State Catalogs with Showcased Services or Showcased Suppliers
3. Do not mix "Showcase Suppliers" with "Ball State University" suppliers or "Showcased Suppliers"

Carts Types:

Active Draft Cart – Current cart that is being prepared for submission.
Draft Carts- Carts waiting for processing, not yet completed.
Assigned Cart **–** Prepared carts that are assigned to another user for submission.

1. Users can switch which Draft cart is their active Draft cart.
2. Users can choose how they would like to view their Draft carts.
3. Other Draft carts remain in view mode, which users can review without making the cart active.
   a. Can't find a cart? Be sure to check "Assigned Carts" tab
4. Assigned Carts, are carts that users have had returned to them by an Approver, or carts that other users have prepared for them.
   a. Assigned carts are made "Active" in the same manner as listed below.
   b. If users assign a cart to themselves, the cart is placed in the Draft Carts for the user to process.

The "Draft" or "Assign Cart" tabs allows you access to a cart and to the following options: "View", "Active", "Remove" or "Move/Split"

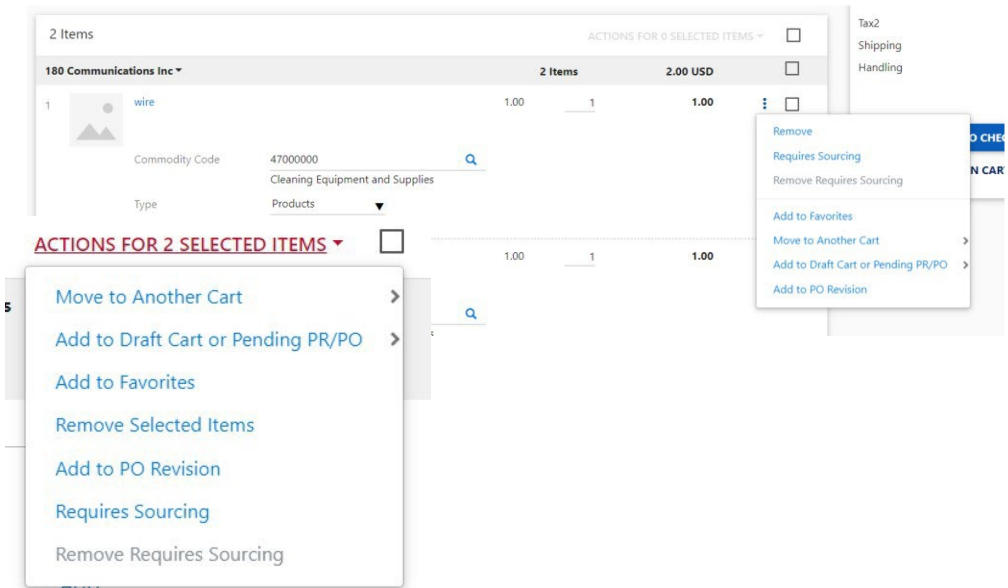
- View- allows you to view your carts
- Active -allows you to activate a cart and check out
- Remove -Deletes a cart. Once you remove a cart it will be deleted
- Move/Split- allows you to move items to and from different carts

To take action on items in the cart, follow the directions below:

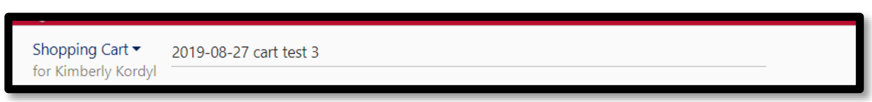
a. Users can select the checkbox, at the top of the window box to move an entire cart to another draft cart. This will clear their "Current Active Draft Cart" and they will then proceed to the Showcase to shop.
b. Users can select multiple or individual items and move them

to another cart, leaving only the items in the cart, they would like to currently process.

i. Select items by clicking on the checkbox at the end of each item.
ii. User can also select the ellipse on the line item and move each item individually.



5. How to rename the Draft Cart or Assigned cart:
It is not required to change the name of the draft cart, which defaults to the user's information. However, changing the name to something meaningful can help identify to other users and yourself what this requisition is.
    a. Double click the name; proceed to click to the right of the Shopping Cart for the user name listed.
    b. Type the alternate name that the user would like to utilize for the cart.



Additional Menu Options available to user to update the Draft Cart:

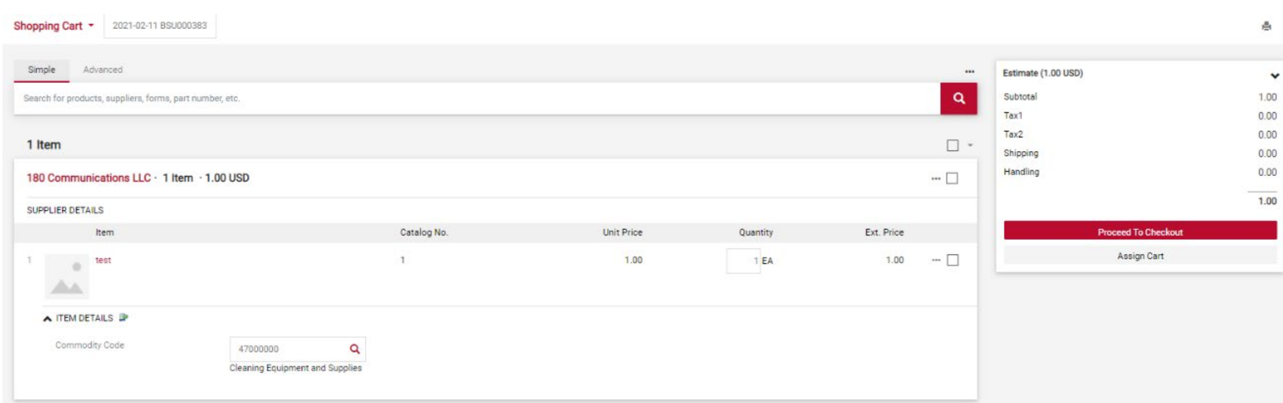
1. **Change the Supplier**- Users can change the supplier that they selected for the items while items are in draft cart, or they can do an address change.
    a. Caution: Different suppliers will probably have different catalog numbers and varying costs for the items moved.

2. **Remove Line items** – users can choose to remove selected item(s) from the Draft Cart.
    a. Users can remove items, when it is determined that a different product is desired.
    b. Another tool that users have to remove items from the cart is the “trashcan” icon, select the “trashcan” after opening the view option on the top action bar.
3. **Adding items to Favorites**-For items that are ordered often; users can place them into their “Favorites” for future orders.

Assigning a Cart to another User

1. When Assigning carts, the user will need to search for the name of an individual using the search function.
2. When individuals are not found in the name search, they cannot accept an assigned cart due to role settings.
3. Shoppers have ability to assign cart to another user when checking out the cart. (Requestors and Approvers submit)

Searching for items while in the Active Draft Cart:
Users have the ability to search for items via Simple, Advanced and Non Catalog searches, while items are in draft cart. To utilize this feature Please refer to shopping instructions.



Return to Index

Moving, Storage and Inventory Forms

Courier Request

Note: Holiday or Early Campus Closing will be an hour earlier.

Please visit Purchasing Services **Central Mail** website for all other questions or concerns regarding Central Mailing Services.

Approved Courier Request Items

- Campus Envelopes
- Fed EX Packages
- UPS Packages
- DHL Packages
- Request Mail Tubs
- Request Mail Trays

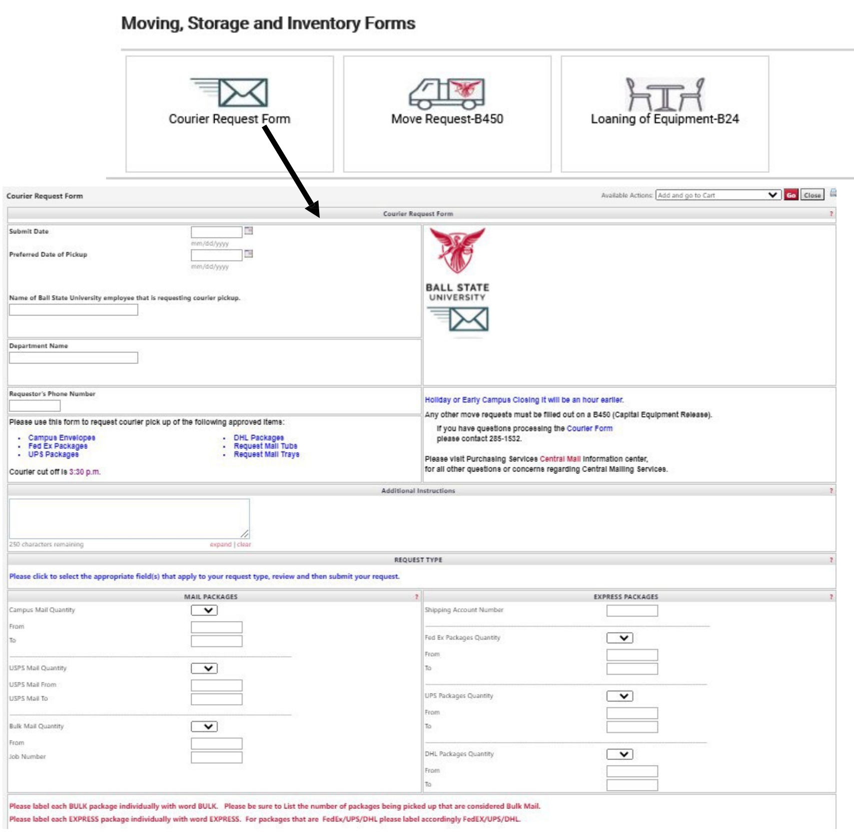
Required Information

- Contact Name
- Phone Number
- Submit Date
- Preferred Date of Pickup

Courier Item Requested

a Find Correct Item type
b Enter both "From" and "To" locations
c Should include: BUILDING CODE/ROOM NUMBER , e.g. HP374, AL250

COURIER REQUEST FORM CUT OFF IS HOUR BEFORE Campus Closing.
(This means if submitted after this time, the request will be completed the next day)



Return to Index

Move Request B450

When do I use a B450?

Recycled Items:	Request for us to pick up recycled items such as batteries, lamps, toner, etc.
Excess:	To remove items from departmentally permanently
Inter-Department Move:	Move items from room to room in the same department
Department	Dept moving from one location to another on campus. Needs to be scheduled with Movers
Loaned:	Temporary use between departments
Long Term Storage item:	Storage for items for departments
Stolen/Lost:	If equipment is lost or stolen
Traded:	Purchased item and trading in an old item
Transferred:	Item moved permanently to a different department

What do you need to complete a B450?

BSU Inventory Number:	Need the BSU tag number on the item that is being moved or excessed.
Item Description:	Brief Description of the item
Serial Number:	Serial number if you don't have BSU Inventory Number
Location Bldg./Room From:	Need location of item(s)
Location Bldg./Room Too:	Need location where the item(s) are moving too/

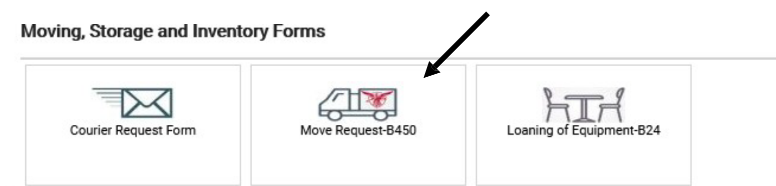
What Account Codes should I use?

733210-Minor Equipment:	for non-computer equipment valued at less than $5,000 per item
734025-Computer Purchases:	for computers valued at less than $5,000 per item
734020-Computer Software Purchased:	for software valued at less than $100,000 per license

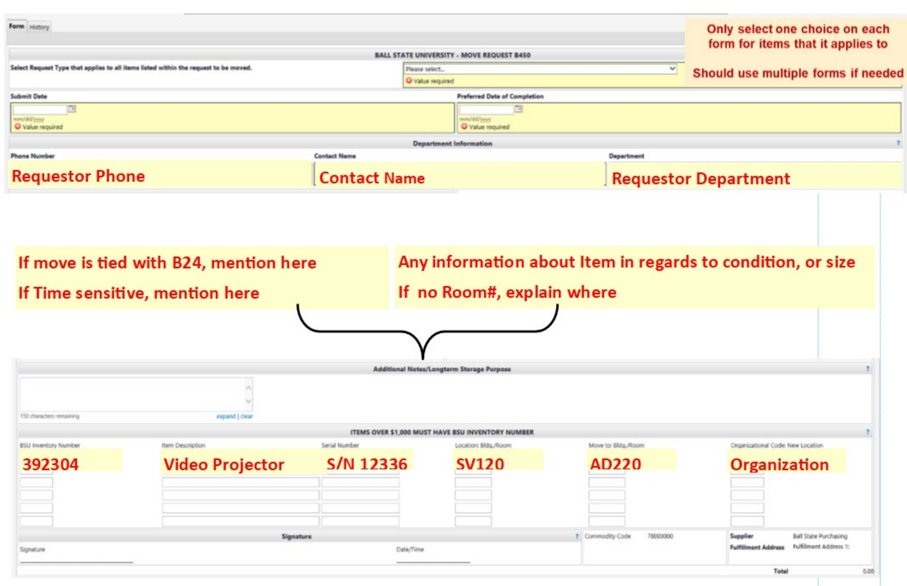
To Complete a Move Request B450

To Complete an Equipment B-24

1. Login to JAGGAER
2. Look for “Moving, Storage and Inventory Forms”
3. Click on “Move Request B450”
4. Complete Form
5. Add and go to Cart
6. Proceed or Assign Cart



Must complete all Required Fields

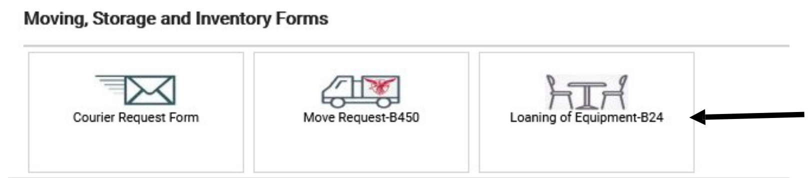


Return to Index

Loaning of Equipment-B24

To Complete an Equipment B-24

1. Login to JAGGAER
2. Look for “Moving, Storage and Inventory Forms”
3. Click on “Loaning of Equipment-B24”
4. Complete Form
5. Add and go to Cart
6. Proceed or Assign Cart



Must complete all Required Fields

Tips to Complete Form

1. Must complete all required fields
2. Actual Preferred Pickup date and Delivered date may vary depending on timing of event (eg. AM day before)
3. Submit the form, Do Not assign.
4. DO NOT mix this form with other suppliers
5. DO NOT use Equipment Account codes on B-24s

Return to Index

Purchasing Services Request Forms

Supplier Request

- The Supplier Request form is processed by using the Showcased Services within JAGGAER and it now follows an independent workflow.
- Supplier Request form is used to update or to add new suppliers to JAGGAER/Banner. After users submit a Supplier Request Form, it will be forwarded directly to Purchasing Services supplier team.
- For a company reimbursement/refund, company stipend or company goods and services, we must have information on the Authorized Representative who can confirm any future changes associated with bank account or contact information. This should not be the Sales Representative.
- Each required section of this form must be completed as requested, in order for the form to submit properly. Users have ample opportunity for a final review prior to submitting the form.
- Any comments or questions regarding the requests are either located in the user email notifications that are forwarded as the form flows thru the workflow process [provided the user has them turned on] or in the History Tab located within the form. This is how users receive notifications as it will be found within the system.
- Should users have any questions when processing this form, or a supplier request, please contact Purchasing Services at: (765) 285-1532.

Navigating the Form

Users have the ability to proceed/move thru the form in one of two ways:

1) Selecting the heading on the left hand side of the form

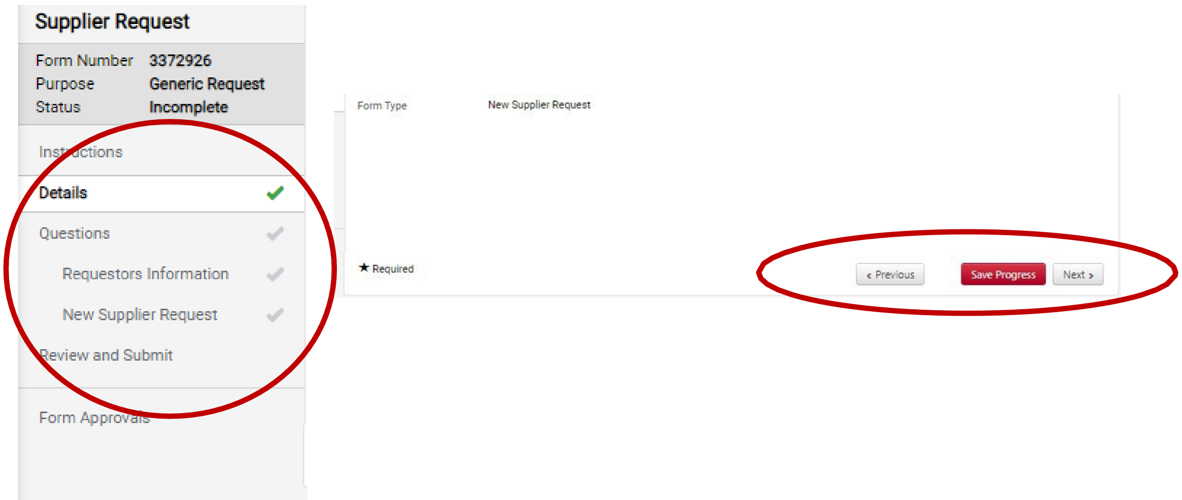
2) Selecting the buttons located at the bottom of each section.

(These options are interchangeable).

Form Headings are located along the left hand side of the form and are as follows: Instructions, Details, Questions, Requestors Information, New Supplier Request, Review and Submit, and Form Approvals. Simply select the heading by clicking on the desired section you would like to complete. .

As sections are completed a green check mark will appear located to the right of the section, the checkmark will remain gray for those areas not completed. If it is not completed correctly, the form will not allow you to proceed with the final request.

As users move thru the form they may periodically be asked to "leave" the page, or "stay" when moving back and forth thru sections. Users should respond by indicating that they want to <leave page> and it will proceed to the next section.



Supplier Request Form Sections by Title Headings

Instructions:

This section gives the basic overview of the form, therefore please review the form instructions prior to processing your form.

Please provide information for the New Supplier Request in the given fields.

Bold fields are required. Please call (765)285-1532 with questions or issues with

the form. If your Supplier Request is urgent, please contact Purchasing Services.

Attach W9s, and other supporting documentation, listed in the "Supplier Information" Area of this form.

Additional Information:

Please make sure that you attach the appropriate information for your supplier below.

Note: If you are requesting a BSU affiliate to be added, or are selecting a reimbursement/refund, a W9 is not required.

If this is a company that is being added so you can purchase goods, please make sure you include how this supplier should receive their purchase order (email or fax).

Return to Index

Details:

This section simply gives the details of the form that has been selected. It is recommended that the user change the Form Name [Template Title], to reflect the form number and name of the supplier they are processing. This will list for the user the name of the individual they have submitted along with the form number so that it will be reflected in their search listing. To do this: <Click> the Form Name field and change the document title name to the form number listed on the left hand side along with the name of the Individual or Company, then select <Save> prior to proceeding.

Questions:

This section consists of two sections the "Requestors Information" and the "New Supplier Request". In each section, each field that is required for the user to complete will have a star located to the right of the field title. Simply <click> on the field below the title to complete the form. There will be a green check mark listed by each completed section.

Requestors Information:

This section contains the contact information of the departmental user. It is the only area where the department should place their department information in order for the form to be processed correctly. If this information is entered into fields outside of this area, the request will not be processed.

New Supplier Request:

This portion of the form must only contain information of the supplier that is to be processed. In this section the user must indicate what the form request is for, and indicate if the Supplier is an Individual or a Company. The questions will change based upon users' responses. In order for the remainder of the form to proceed, it requires a response. When a W9 is required for the user, an option to attach will appear and it will allow you to attach the document. For a company Reimbursement/Refund, please provide an explanation for the reimbursement.

Attachments:

Attachments are located within the "Questions" area of the form under "New Supplier Request Form". When a W9 is required, the option to attach the documentation will appear. If it is not required, then the attachment option does not appear for the user.

This is the only area that a user will be able to attach documentation regarding this request. Multiple documents may be attached here if required. If multiple attachments are necessary, add and save after each document. The user has the ability remove these documents if needed. Simply select the <Edit> button to the right of the section and select Delete>. If you have a W9 for your Supplier this is where you need to attach the .PDF format of the document.

Review and Submit:

Users must review the form prior to submitting, the system will not skip this section. Once reviewed, the user is required to select the <Submit> button located to the bottom right of the screen and then select Confirm with a <yes> response for the form to be submitted.

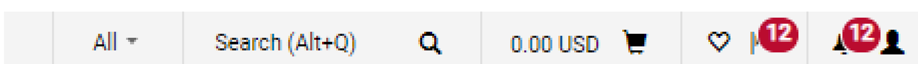
Notifications:

The user will need to resubmit the form utilizing this response section once they have made any correction. Once the form is submitted and assigned a number for the independent workflow, the user can then utilize that number to search for the form. The user should no longer see the notification.

Form Approvals workflow:

The form is located in a separate workflow (not a regular requisition workflow form) and it will have its own set of approvals. Once the user has completed processing the form, they can then select it by clicking on the “Form Approvals” section. They will also have the ability to locate it under “Form Request Actions” notifications that have been forwarded to them or thru their email notifications.

The Workflow Form notification is located at the Bell, listing for the user the stage of their requests as they are processed. The user will receive an email notification provided they have requested that option in their user notification setup to be turned on.

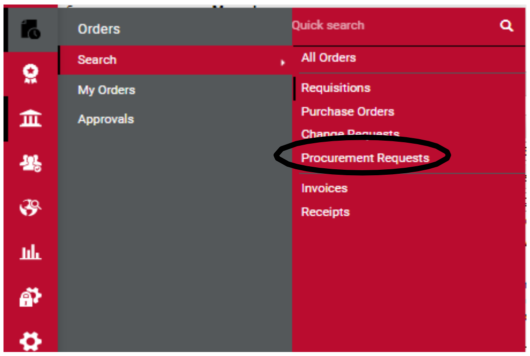


Automatic email notifications will only forward to the user if it has been returned to them, or if the item has been processed. To review items you can utilize the search document/form options within JAGGAER.

Return to Index

Searching for the Supplier Request Form:

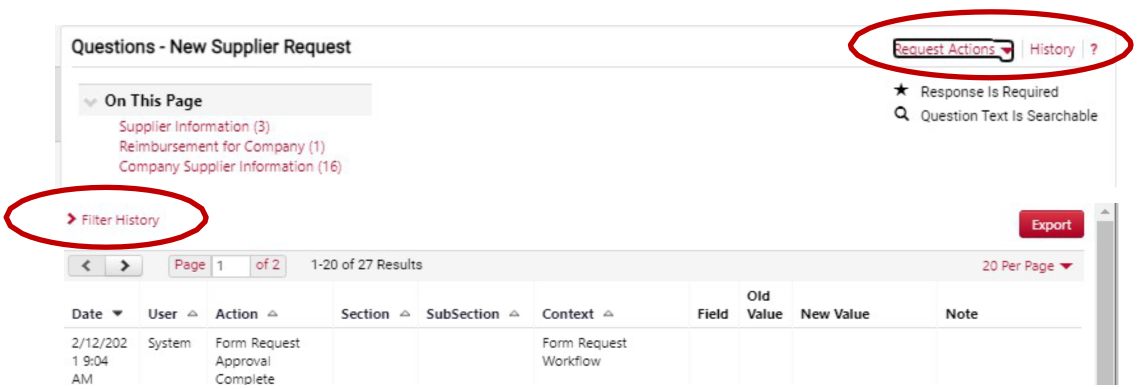
To locate the form users can <click> on the notifications that have been forwarded to their email notifications, or they can utilize the search box and select “My Procurement Requests” from the Orders on the side.



Apply appropriate filters and/or search

How to review Comments on Returned Requests:

The search listing that is provided to the user will give them a way to review their items, how they have been completed, and to review if there have been any notes placed on their requests once they have been processed. To access the form, <Click> on the form name, beside the form number to select the form in order to make the appropriate changes, or to view the responses/comments on the history tab.



Returned Carts” & the “History” Tab

For returned carts/requests, the user can navigate the form as before to enter the necessary corrections, such as an initial or name correction. Then Select <Save> as they proceed thru their corrections.

To review why a cart has been returned to the user they can review the notes regarding the cart by Selecting the <History Tab> located in the top right of the form, as listed above.

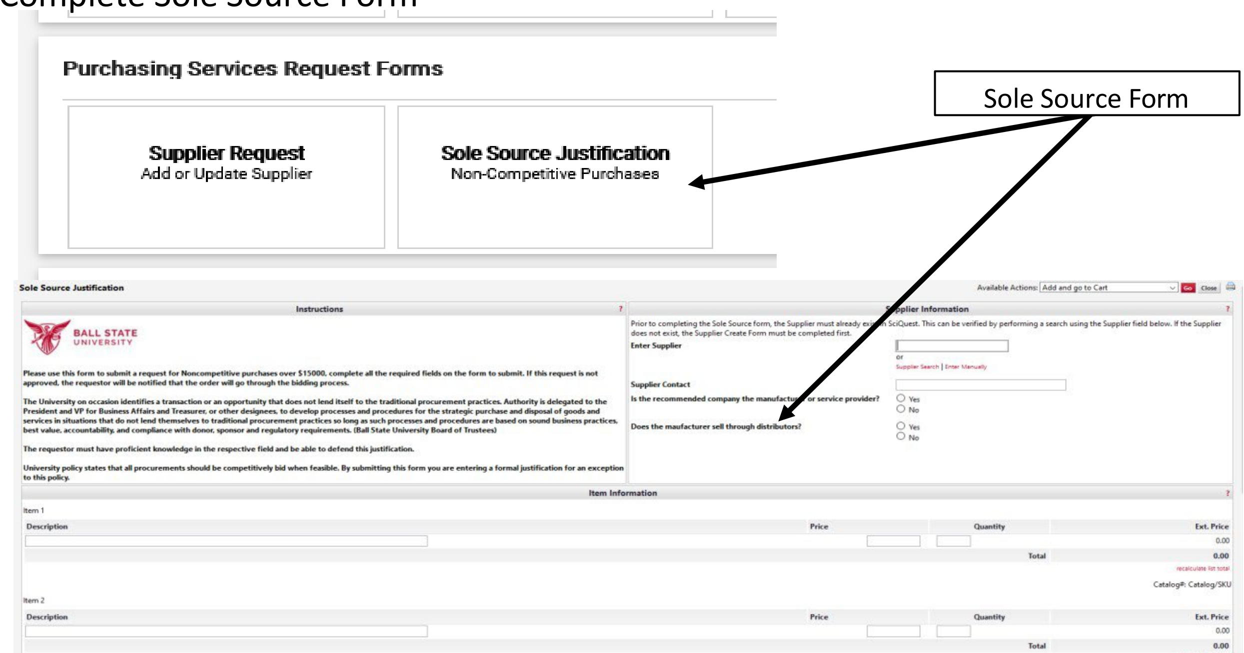
If changes have been made to the request by users, they must select <Save> as they proceed thru the tabs for those changes to be made permanent, then select <Submit> Request for that request to be processed.

Return to Index

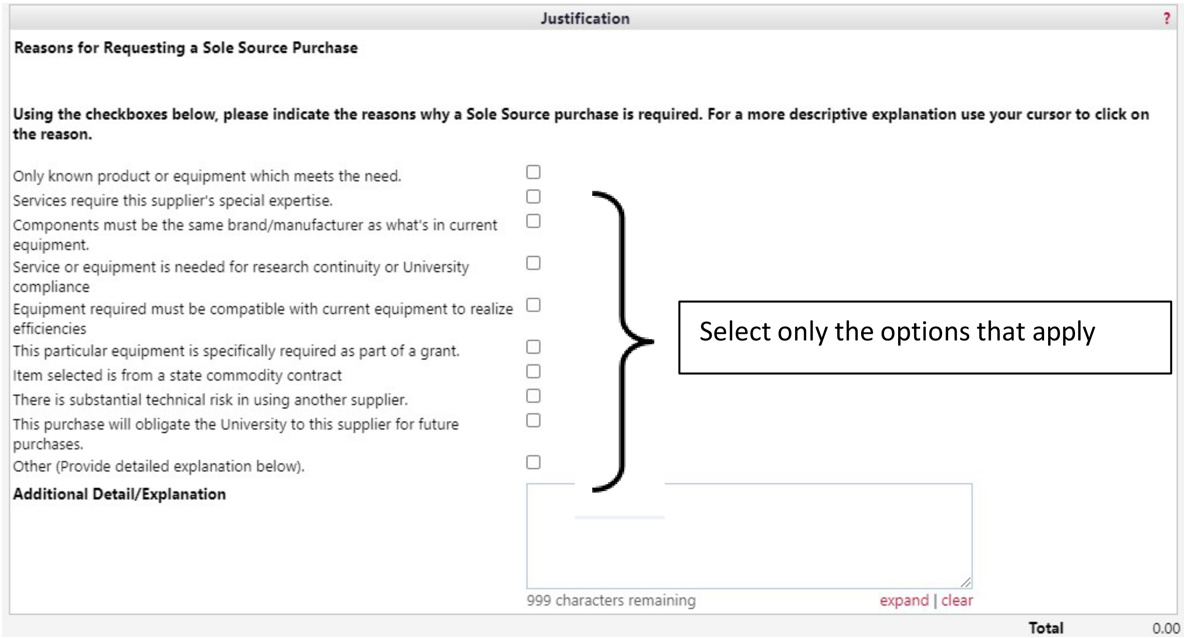
Sole Source Justification

The “Sole Source” form can be accessed on the JAGGAER Home page under “[Showcase Services](#)”. A “Sole Source” is a procurement method that does not provide full and open competition. A Sole Source is utilized when only one source is available. There are restrictions on the use of this means of procurement and documentation must show justification for using a single source for the acquisition. It applies to anything $15,000 or more.

If when purchasing Capital Equipment, more than one piece of equipment that is greater than $5,000, or you want to ensure it’s from a specific vendor by using a “Sole Source:” please go to step 2.Complete Sole Source Form



[Return to Index](#)


Justification

Reasons for Requesting a Sole Source Purchase

Using the checkboxes below, please indicate the reasons why a Sole Source purchase is required. For a more descriptive explanation use your cursor to click on the reason.

- Only known product or equipment which meets the need. ☐
- Services require this supplier's special expertise. ☐
- Components must be the same brand/manufacturer as what's in current equipment. ☐
- Service or equipment is needed for research continuity or University compliance ☐
- Equipment required must be compatible with current equipment to realize efficiencies ☐
- This particular equipment is specifically required as part of a grant. ☐
- Item selected is from a state commodity contract ☐
- There is substantial technical risk in using another supplier. ☐
- This purchase will obligate the University to this supplier for future purchases. ☐
- Other (Provide detailed explanation below). ☐

Select only the options that apply

Additional Detail/Explanation

999 characters remaining expand | clear

Total 0.00

1. To make this determination you need to first identify what is Capital Equipment ($5,000 or more) versus Minor Equipment (< $5,000).

    a. Be sure to include installation, training and shipping costs in the cost of the equipment. (Exclude warranties and software -unless software is valued at $100,000 or more per license).

    b. If "total cost is $5,000 or greater than you have to utilize the correct accounting code for the capital equipment.

    c. Mark these items with a "C" (Capital Equipment) so you will know before starting your requisitions.

    d. If not purchasing any minor equipment the form still needs to filled out, but this section will be for $0.00.

2. Identify other items on quote.

    a) If the quote involves items that are not to be included as Capital Equipment, these items will need to be included on the Sole Source form as well.

    b) Items such as warranty cost, small equipment are not tied to Capital Equipment Cost.

    c) Mark these items "M" (Minor Equipment) so you know before starting your requisition.

Return to Index

3. Steps to complete both of these items together:
    a) Make sure your active cart is empty.
    b) Click on "Sole Source Justification" under "Showcased Services"
    c) Complete the "Sole Source Justification" form as usual, except only include line items that you marked with "M" (Minor Equipment).
    d) When completed, and you select "Add to Cart" your total should match the items you identified on your quote as Non-Capital Equipment
4. Adding Capital Equipment to Sole Source
    a) Make sure the dollar amounts in your cart that you applied to the "Sole Source Justification" are correct.
    b) Next Click on "Home" and then on "Non-Catalog".
    c) When the non-catalog window appears, select the same supplier you utilized on your Sole Source
5. Now that they are all in one "cart" you need to apply the proper accounting code to each individual line to ensure proper routing. *Customizing a Requisition*.
6. If accounting codes are incorrect, it could cause a delay in your requisition. *Reference index for Account Code Information and Equipment Quick reference sheet.*

Payment Request Forms

Non PO Payment Request Form Instructions

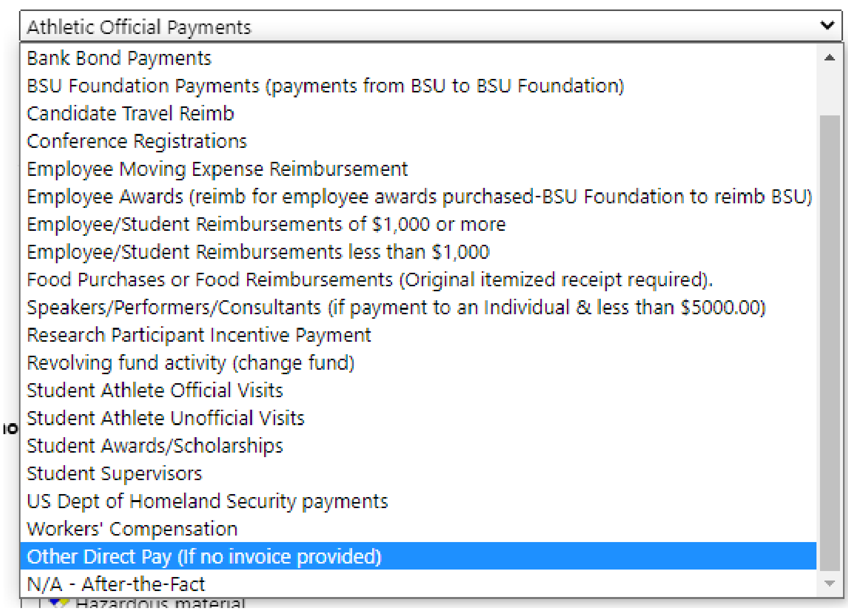
Before beginning this process for a reimbursement, please verify that none of the expenses have been previously paid/reimbursed.

Selecting the Non PO Payment Request

- Login to JAGGAER
- Select the "Non PO Payment Request Form" (Located under Payment Request Forms)
- When completing the form, any field on the form that is **BOLD** is required

Completing information fields for Non PO Payment Requests

1. **Supplier**
   a. Select appropriate vendor
      i. If vendor does not exist, complete a Supplier Request form
2. **Fulfillment Address**
   a. To view different fulfillment addresses, click on "select different fulfillment center" and choose the appropriate address.
   b. If the fulfillment address does not exist, complete a Supplier Request form to have the supplier information updated
3. **Remit to Address**
   a. Change this address to where the payment should be remitted. If an invoice is attached, this address should match the 'remit to' address on the invoice.
      i. If the remit address is incorrect, email ap@bsu.edu to have the correct address added.
4. **Payment Type**
   a. Choose the appropriate option from the dropdown list
   b. For invoices payable to vendors, and a PO was not created; select "N/A-After the Fact."



5. **Product Description**
    a. Provide a description of the payment request. This will print on the check stub or direct deposit remittance advice sent to the vendor.
6. **Invoice, Receipt, or Total Amount**
    a. Enter the amount to be paid to the vendor or total to be reimbursed
        i. If there are multiple invoices, they must be entered as separate line items (see further instructions below).
        ii. If there are multiple receipts being reimbursed, a summary sheet must also be attached with the receipt totals.
        iii. Sales tax cannot be paid or reimbursed, unless it is being paid or reimbursed from a fund/org that is not subject to the sales tax exemption.
7. **Supplier Invoice Number**
    a. Enter the vendor invoice number
        i. If you do not have a vendor invoice number, enter the receipt date or any other beneficial data to the vendor. This will be printed on the check stub or direct deposit remittance advice.
8. **Invoice Date**
    a. Enter the date listed on the invoice or the receipt provided for reimbursement
        i. If there are multiple receipts, please use the oldest receipt date.
        ii. If this is a student or employee reimbursement over 60 days from the date of purchase, approval is needed from the Accounts Payable Office before the requisition is approved. Complete the Accountable Plan Exception Review Form and email it to ap@bsu.edu.
9. **Due Date**
    a. Payment will not be sent until the first business day after this date, so if payment is needed on a certain date, do not use that date as the due date.
10. **Documentation of an After-the-fact Purchase**
    a. Provide a detailed explanation of why the University purchasing policies were not utilized.
        i. Complete this field ***only*** for an After-the-Fact request of $1,000 or more
        ii. Provide a reason why the request was not submitted on a Purchase Order or paid with a Procurement Card.
11. **Commodity Code**
    a. This is a default value and does not need to be updated or changed.


Documentation of an After-the-fact Purchase

Complete the following fields if this is for an After-The-Fact purchase.

Provide a detailed explanation of why University purchasing policies were not utilized.

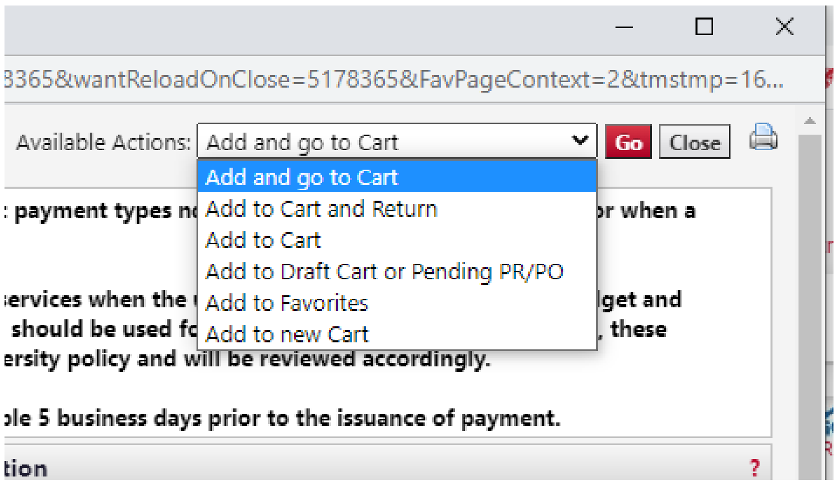
300 characters remaining expand | clear

Commodity Code 89999900 search...

Return to Index

Once the Non PO Payment Request form is completed, click the 'Go' button next to 'Add and go to Cart' in the 'Available Actions' section at the top of the form.

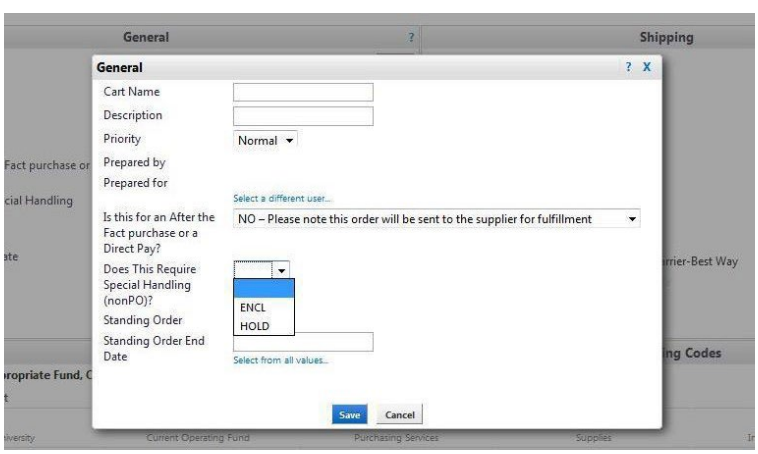
If you have multiple invoices to enter, they should each be entered as a separate item on the requisition, to prevent duplicate payments from being processed. Choose 'Add to Cart and Return' to add one invoice and to return to the Non PO form to create another item for a different invoice.



Click the 'Proceed to Checkout' button from your shopping cart. From here, ensure the request information is correct. Enter the correct FOAPAL information, including the correct account code. Attach any applicable invoices, receipts, or other needed documentation in order for the request to be approved.

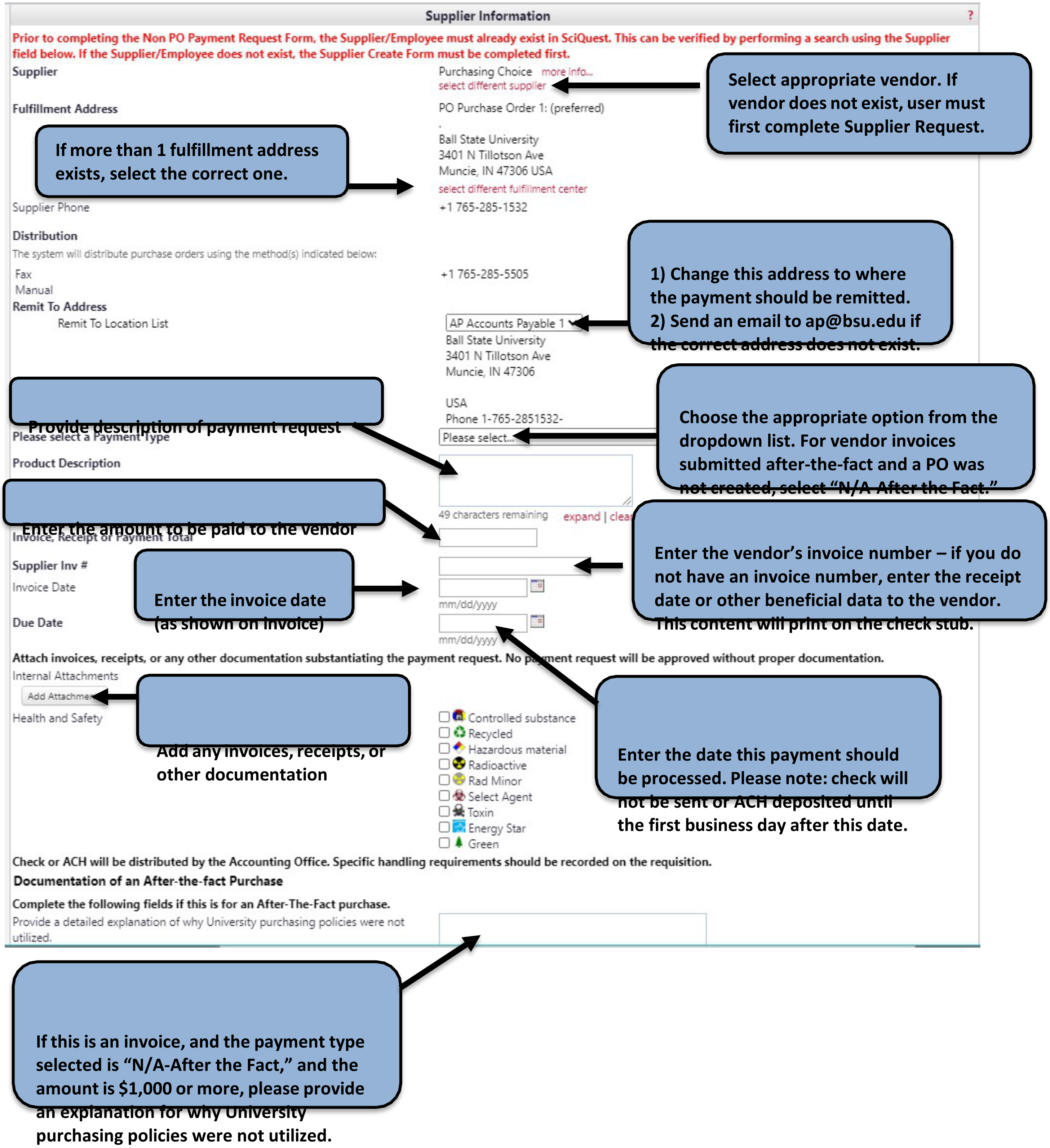
On the requisition header, if the check needs to be held for pickup or if the attachments need to be mailed with the check, complete the special handling field.

1. **Does This Require Special Handling (nonPO)?**
   a. Choose 'HOLD' to have a check held in Accounts Payable
   b. Choose 'ENCL' to have the attachments mailed with the check
   c. Leave blank if neither option is needed



Return to Index

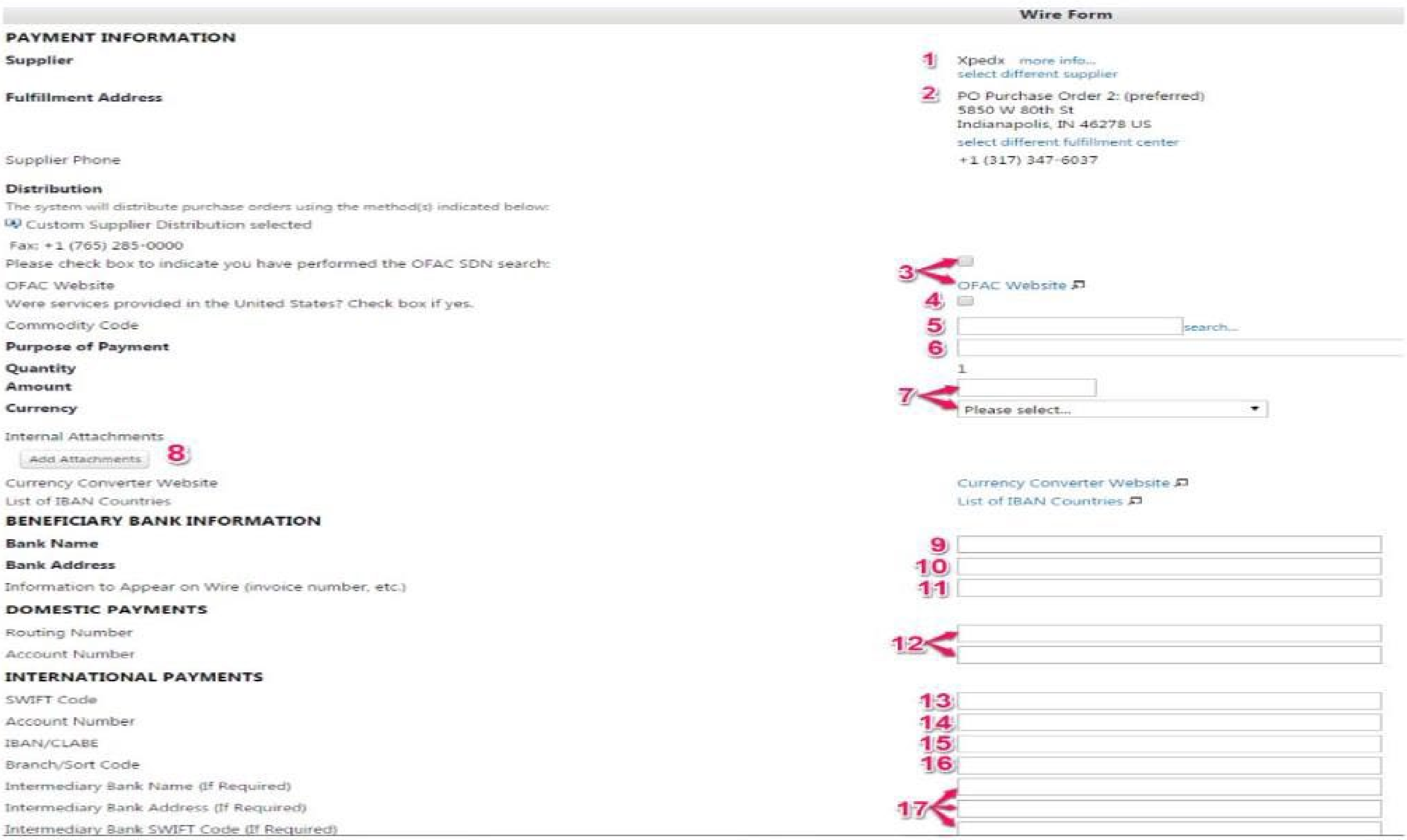
Once everything appears as it should, click the ‘Place Order’ button.



Return to Index

Completing Wire Request form

The Wire Request form in JAGGAER is used to remit payment to vendors through a wire transfer. This electronic form replaces paper forms, allowing for expedited payment request and electronic workflow routing/approvals.



1. Enter the name of the vendor you wish to pay. If the vendor does not exist in JAGGAER, you must complete a Supplier Request form (with all appropriate documentation) in JAGGAER. Once the vendor has been created, you may complete the Wire Request Form.

2. JAGGAER requires the ‘Fulfillment Address’ when selecting a vendor, even though there will be no Purchase Order sent to the vendor for wire requests. Therefore, there is no need to edit this selection.

3. Verify the payee is not considered a “Specifically Designated National’ (or ‘SDN’) by the United States. United States entities are prohibited from paying an SDN. Please refer to the ‘OFAC Website’ link in the Wire Request Form to search for your payee; if the payee is not listed as an ‘SDN’, you may continue completing the form. If the payee appears in your search results, contact the Controller’s Office (285-8444) for further guidance. You must click the checkbox next to ‘Please check box to indicate you have performed the OFAC SDN search” when you have completed your search. Create a screenshot of your search results

4. If the payment is for services provided in the United States, in part, or in total, you must check the checkbox next to 'Were services provided in the United States? Check box if yes.' If you are unsure if services were provided in the U.S., check the corresponding box.
5. Enter the appropriate commodity code in the 'Commodity Code' field.

6. Enter the purpose for your payment in the 'Purpose of Payment' section of the form.

7. Enter the amount you wish to pay and choose the appropriate currency from drop-down box. A link to a currency converter website has been provided. Note: it is not necessary for this form request to be in U.S. Dollars.

8. Attach any supporting documentation for your payment request, including invoices, contracts, etc., to the form by clicking the 'add attachment' button. BE SURE TO ATTACH THE OFAC SEARCH RESULTS.

   If submitting an international payment, an IBAN (International Bank Account Number) value may be required. A link to search for the IBAN (when applicable) has been provided if you have not already obtained the correct IBAN.

BANK INFORMATION

9. Enter the name of the recipient's bank in the "Bank Name" field.

10. Enter the address for the recipients' bank in the "Bank Address" field.

11. Enter any information you wish the vendor to see when the payment is received.

DOMESTIC PAYMENTS

12. If requesting a domestic payment, enter the payee's bank routing number and account number in the appropriate fields.

INTERNATIONAL PAYMENTS

Note: If the payment is to go to an intermediary bank (and then forwarded to the recipient's bank), be sure to complete the "Intermediary Bank' portion of the form.

13. If requesting an international payment, enter the appropriate SWIFT Code (bank identification; between 8- 11 characters) for the recipient's bank.

14. Enter the appropriate bank account number in the 'Account Number' field.

15. Enter the IBAN(Account identification; up to 34 characters) or CLABE (account identification in mexiceo:18 digits) value in the 'IBAN/CLABE' field.

16. If applicable, enter the branch/sort code for the recipient's bank in the 'Branch/Sort Code' field.

Return to Index

17. If an intermediary bank is listed; enter the intermediary bank's information on the form.

SUBMITTING THE FORM

1. Click the 'Go' button next to 'Add and go to Cart' in the 'Available Actions' section of the form. Do not be alarmed that the amount in your JAGGAER shopping cart is '0.00'. The information you entered in the form is contained in the form itself.

2. Click the 'Proceed to Checkout' button from your shopping cart.

3. From here, ensure your request information is correct. Under the 'Is this for an "After the Fact" purchase or a "Direct Pay"?' drop-down box, choose "NO". The FOAPAL entered for this form will be the FOAPAL charged after the payment has been made. Once everything appears as it should, click the 'Place Order' button.

4. The request will then be routed as any other requisition. You will be notified if it is determined that tax withholding must occur for your payment request (in order to comply with IRS requirements).

5. If you are an Approver, you will approve the payment request as you would any other JAGGAER payment request.

Entering Receiving

Complete receipts for products is only required for purchases greater than $5,000.
Any Purchase Order greater than $5,000 must have receiving entered and an invoice for payment to be completed

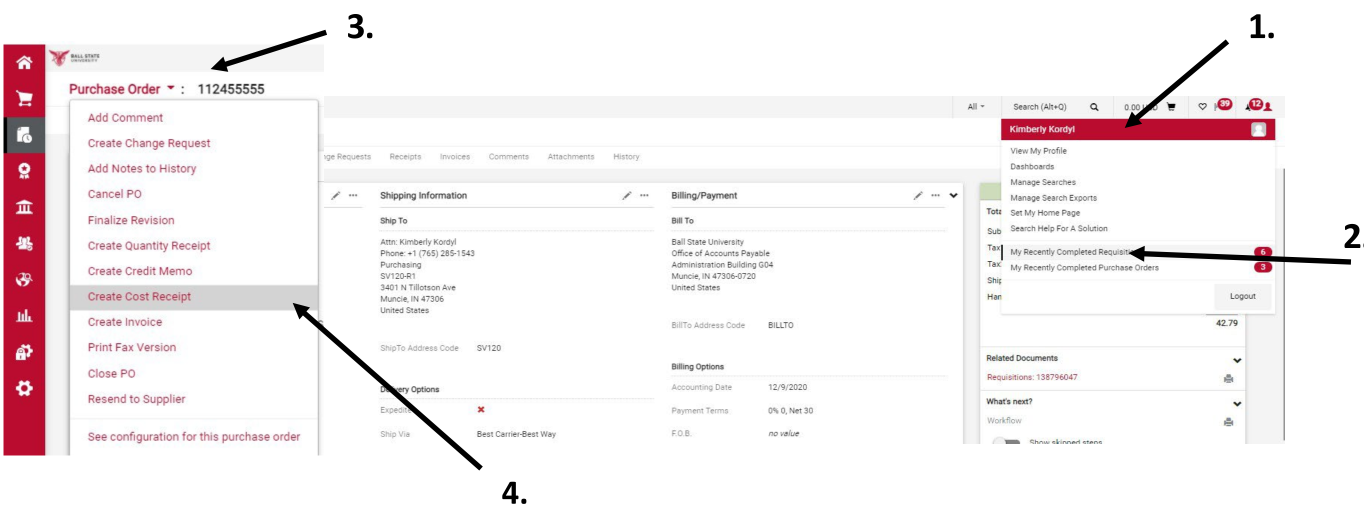
Cost vs Quantity Receipt

Either receipt type is acceptable for payment. Quantity receipt is used more often than cost

Cost-Only: enter cost amount that you want vendor to be paid.

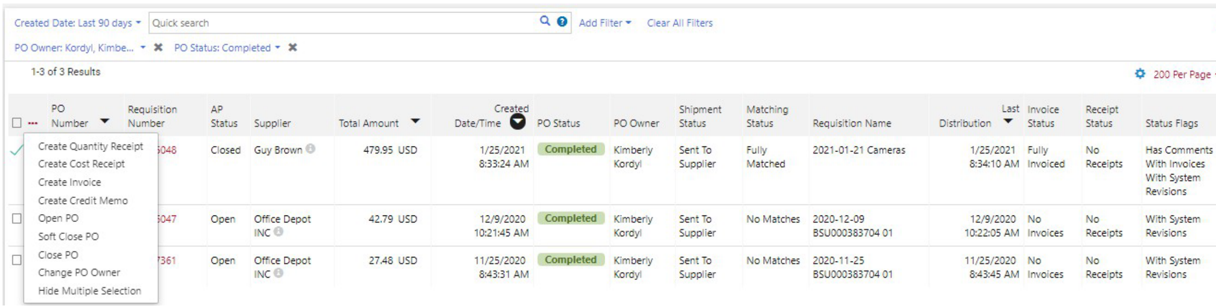
Quantity: Quantity means that you have received that number of items and invoice amount will be paid.

Click on your name and then select “My Recently Completed “Purchase Orders” then click on Purchase Order



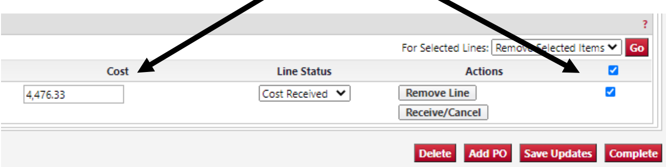
<u>Steps to Receive and Order</u>

Find the Purchase Order that needs to have a receipt, and click on the checkbox aligned with the PO number on the right that needs receiving, from the drop down page, select Create Quantity Receipt or Create Cost Receipt.



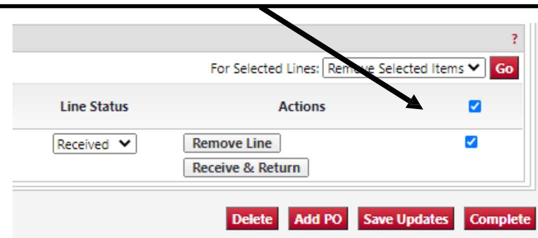
Cost Receipt

Enter Cost needed by line and select check and click on "Complete"



Quantity Receipt

Select Lines you want to receive and then click on "Complete"



When completed, you can view the Purchase Order under the "Receipts" tab.

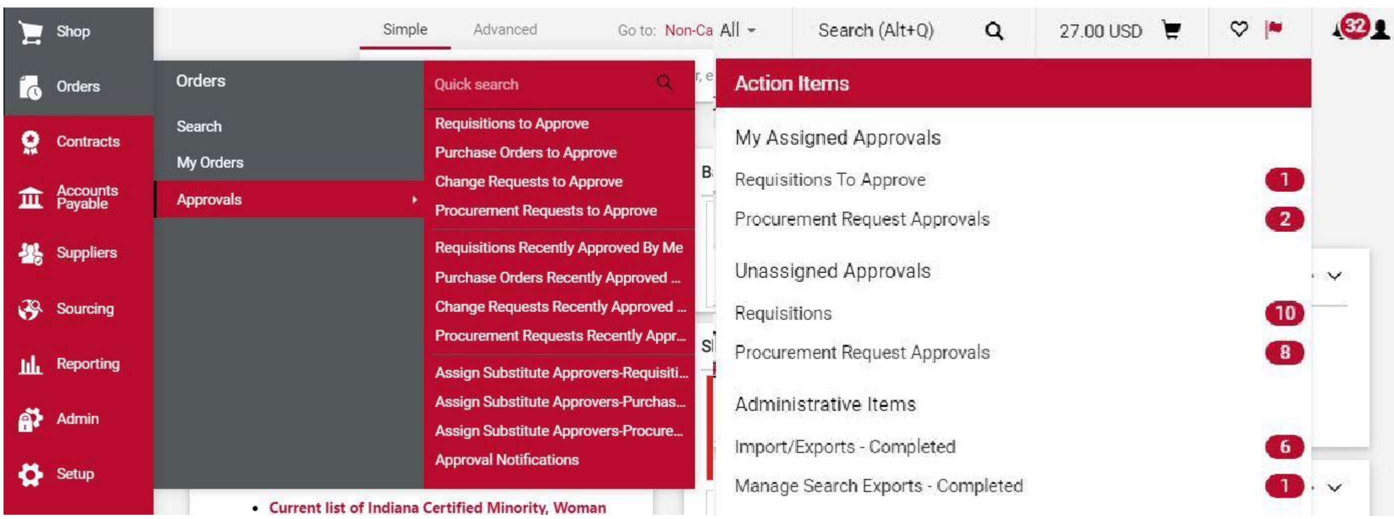
Approving a Requisition

What is an Approver?

The term “Approver” is used to describe someone that is responsible for reviewing and evaluating Purchase Orders and/or Requisitions. Approvers can take one of the following actions: Approve, Return/Reject Requisitions or Put Requisitions on Hold.

APPROVERS WILL NOT HAVE ABILITY TO APPROVE THEIR OWN REQUEST

Viewing “My Approvals”



Step-by-Step to Approve a Requisition
STANDARD APPROVALS:

With standard approvals, the approver opens the order and reviews the information and makes any changes if needed, and then approves the order. To make changes or to return or reject, users must assign the order to themselves and take action.

1. In the My Approvals folder locate and open the document(s) you would like to approve.
2. Open the document and review the information and make updates if needed.

Return to Index

3. Select the Approve/Complete option from the Actions menu to approve the document and move it to the next step, or select Approve/Complete & Show Next from the drop-down.

Approving Items to Verify

1. Look who prepared or who is requesting item.
2. Accounting Codes (FOAPAL)
   - Fund and Program match fund is NOT 100100
   - Correct organization code
   - Account Code correct
3. Non Po Payment
   - Request for Payment
   - Verify if invoice attached does not have tax applied
4. Non-Catalog
   - If attached quote make sure items matches quote
   - Multiple Quote comparisons should only be included in “internal attachments

Resources for Approvers

To confirm what program code should be used with what fund:

Argos Report can be found

Production-INB>Controller>Public>Program Code Lookup>Dashboard

Return to Index

Index

Commodity Code Key Word

Equipment	Services	Construction
Supplies	Marketing	Furniture
Janitorial	Organization	Product
Maintenance	Components	Plumbing
Computers	Travel	Electric
Landscaping	Reimbursement	Weld
Office	Food	Lighting
Educational	Transportation	Electronics

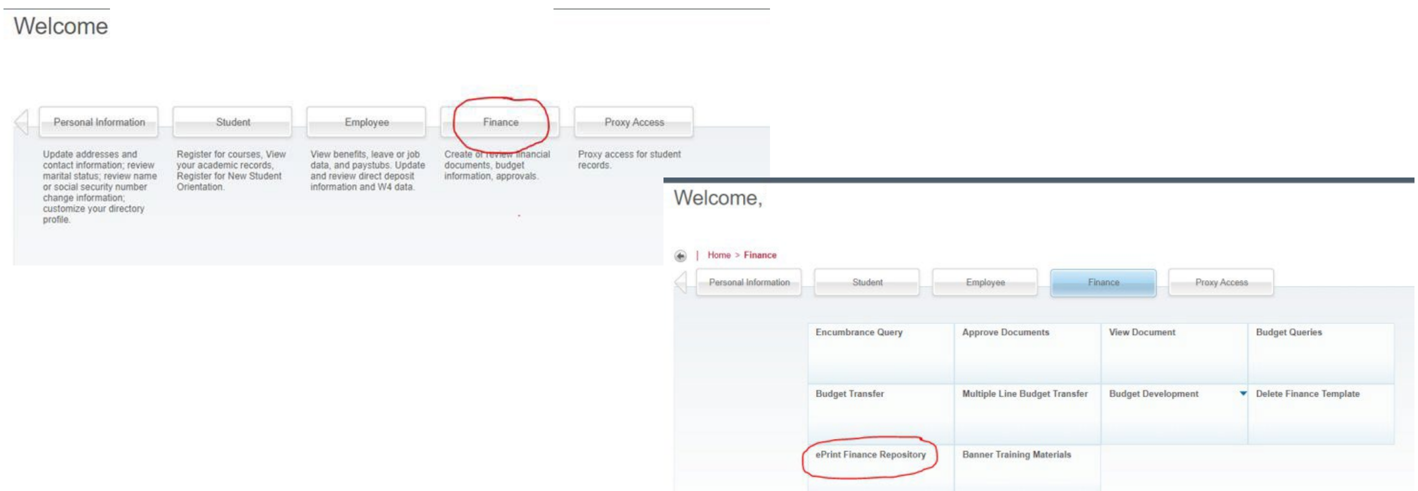
Purchasing Agent Quick Reference

<table>
<tr><th>Tim Hagen</th><th>June Sanders</th><th>Branden Roberts</th><td rowspan="9">Kevin Jarnagin

All food-related items</td></tr>
<tr><td>Athletic equipment and Supplies</td><td>Architect and engineering services</td><td>Electrical equipment supplies and services</td></tr>
<tr><td>Electronics</td><td>Commercial appliances and dining equipment</td><td>Wire/Cable Bulk</td></tr>
<tr><td>Marketing Services</td><td>Ball State University branded clothing and promotion items</td><td>Copiers/MFP equipment and supplies</td></tr>
<tr><td>Medical Equipment and Supplies</td><td>Construction and machinery (Commercial/Industrial)</td><td>Printer/fax equipment and supplies</td></tr>
<tr><td rowspan="2">Medical Equipment and Supplies
Office and School Supplies</td><td>HVAC equipment and supplies</td><td>Printer/fax equipment and supplies</td></tr>
<tr><td>Janitorial Supplies</td><td>Security equipment and Supplies</td></tr>
<tr><td rowspan="2">Office and School Supplies</td><td>Vehicles</td><td rowspan="2">Security equipment and Supplies</td></tr>
<tr><td>Furniture</td></tr>
</table>

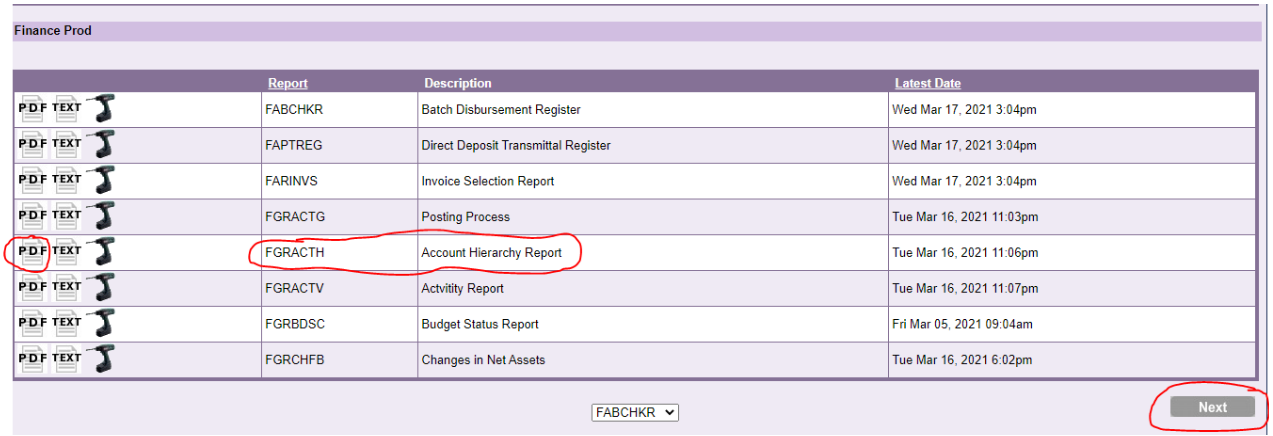
Account Code Section (FOAPAL) Information

Information about specific fund, organization code, account codes and program codes can be found via SSB. Login to “My BSU”, under “Banner” click on Self-Service Banner(SSB) and then follow the screen shots below:



Find the report you need and click the PDF icon on that line to bring up the report.   On the Account code report, scroll down until you find the codes that begin with “7”, which are all of the expense category codes. You will rarely, if ever, use any of the account codes that begin with a number other than 7. If you do not see the report you need, click on “Next” in the bottom right corner to advance to the next page.

- List of Reports available:
- Fund codes can be found on FGRFNDH
- Organization codes can be found on FGRORGH
- Account codes can be found on FGRACTH
- Program codes can be found on FGRPRGH

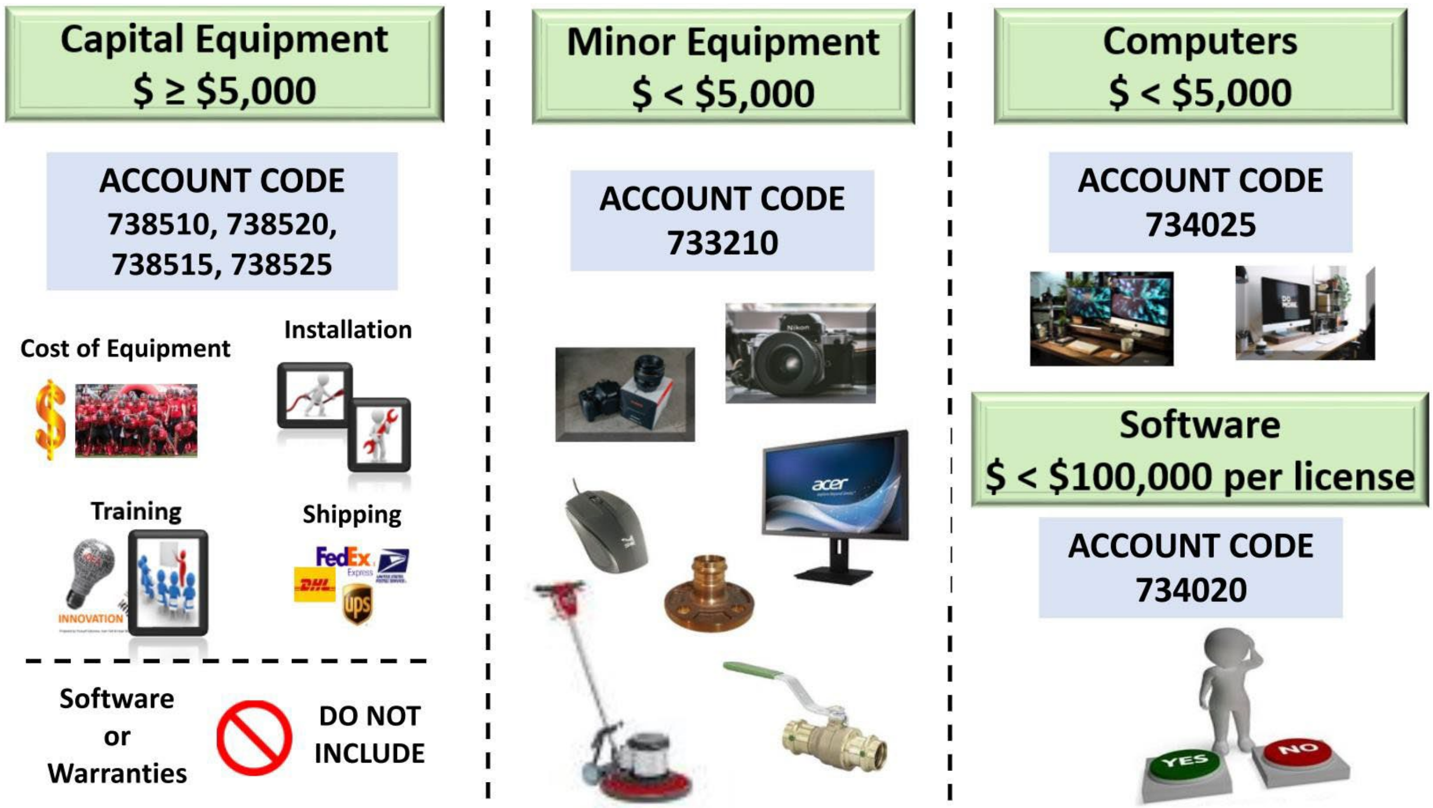


Common Account Codes

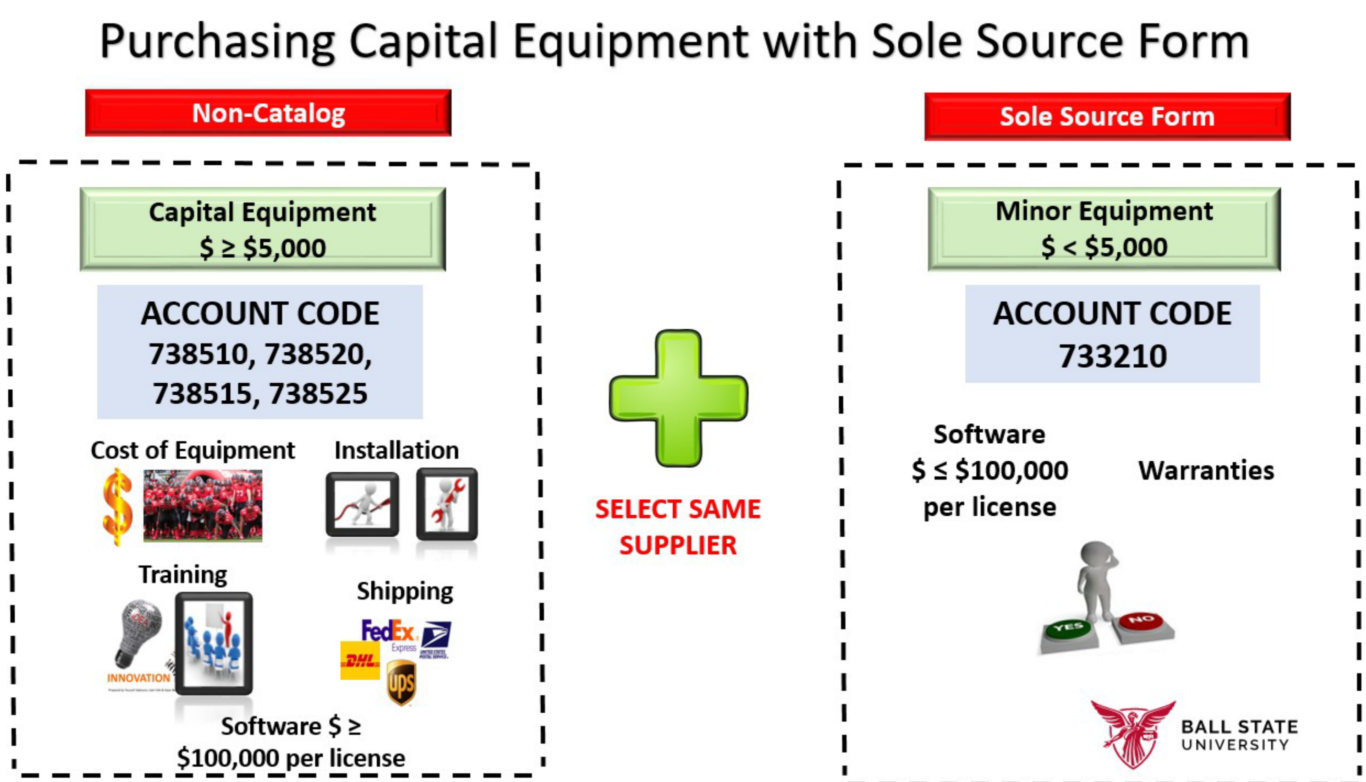
Account Codes	
733210	Minor Equipment(Individual item < $5,000
720070	Maintenance Supplies
733010	Supplies
733040	Custodial Supplies
733080	Office Supplies
733090	Instructional Supplies
733100	Research Supplies
730050	Stipends
730080	Other Contract Services (can be used for warranty)
733120	Subscriptions and Publications
733130	Advertising
733210	Meals & Lodging
734020	Computer Software Purchased ($<100,000)

Capital Equipment	
738510	Educational Equipment
738520	Auxiliary Equipment
738515	Software Expense Educational
738525	Software Expense Auxiliary
***Capital equipment cost includes installation, training, shipping**	

Equipment Quick Reference



Capital Equipment and Sole Source Quick Reference



Return to Index