

## JAGGAER 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:

### 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.

### Shopping Cart



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

### Favorites



Displays your personal bookmarks and site bookmarks.

### Action Items



Items assigned to you for approvals that require action.

### Alerts



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

### Help

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

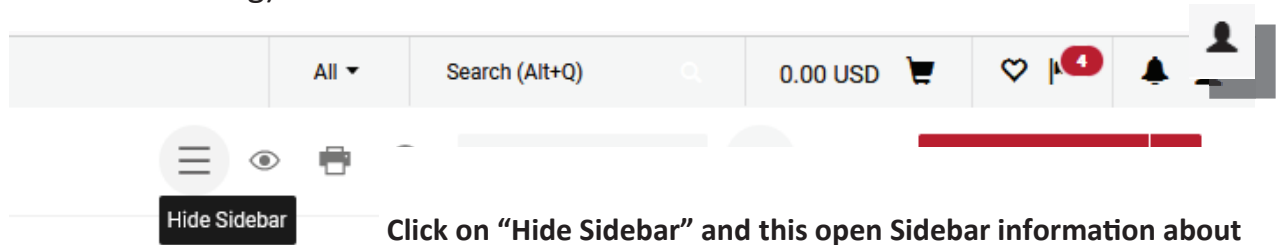
### User Profile



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

## What is Next for my Requisition?

1. Make sure “side bar” navigation” is on.
2. This allows you to review the stage of your requisition (where it's waiting).



Click on “Hide Sidebar” and this open Sidebar information about

This screenshot displays the 'Pending' requisition workflow. The main content area shows a 'Total (81.15 USD)' and a 'What's next?' section with a 'Workflow' toggle. The workflow steps are: 'Submitted' (3/7/2022 10:45 AM, Katie Flowers), 'Banner Budget Authorization' (Completed, System), and 'Org Approval' (Approved, Benjamin Gibbs). A 'Budget Director Approval' step is highlighted with a red location pin icon and a red heading. The sidebar on the left shows 'Billing' information, including 'Bill To' (Ball State University) and 'Billing Options' (Accounting Date: 3/11/2022). Annotations on the right side of the screenshot include: 'Chevron Right [Closed]' pointing to the 'Total' section, 'Chevron Right [Open]' pointing to the 'Workflow' toggle, 'Approvals Completed Show Black Heading Approval Title' pointing to the 'Banner Budget Authorization' step, and 'Select Red Active Approval Steps To View Approvals Needed' pointing to the 'Budget Director Approval' step.

## Requisition Actions

### Withdrawing a Requisition

Requisitions only can be withdrawn by the requester 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 the Purchase Order.

The first screenshot shows the 'Requisition' dropdown menu with the following options: 'Assign to myself', 'Approve/Complete Step & Show Next', 'Approve/Complete Step', 'Withdraw Entire Requisition' (highlighted), and 'Copy to New Cart'. An arrow points to the 'Withdraw Entire Requisition' option.

The second screenshot is the 'Withdraw Entire Requisition' dialog box. It contains a warning: 'Once a requisition is withdrawn, it cannot be reinstated. Click OK to withdraw, or CANCEL to leave the requisition unchanged.' Below this is a 'Reason' field with the placeholder text 'Type Reason for withdraw'. An arrow points to this field. At the bottom of the dialog are 'OK' and 'Cancel' buttons. Another arrow points to the 'OK' button.

### Copying a Requisition

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

Great option to edit "Rejected" Requisitions that are non-catalogs, payment requests.

The first screenshot shows the 'Requisition' dropdown menu with the following options: 'Return to Cart', 'Copy to New Cart' (highlighted), 'Add Comment', 'Continue Shopping', 'View carts', and 'See configuration for this requisition'. An arrow points to the 'Copy to New Cart' option.

The second screenshot shows the requisition details page. The top navigation bar includes a search bar, a cart icon with '44.00 USD', and a 'Proceed To Checkout' button. An arrow points to the 'Proceed To Checkout' button. Below the navigation bar, there is a section for 'Requisition 3171193' with a 'Copy to New Cart' button highlighted. An arrow points to this button. Below this, there is a section for 'Prepared for Kimberly Kordyl' and 'Does This Require Special Handling (nonPO)? no value'. At the bottom, there is a 'Standing Order' section with a red 'X' icon.

## ENTERING RECEIVING

Completing 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 for it to be completed.

### Cost vs Quantity Receipt

Either receipt type is acceptable to initiate payment. A Quantity receipt is used more often than Cost.

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

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

### Steps to Receive an Order

Use Cost or Quantity to Create a receipt.

