

Jagger Quick Guide

Need an answer fast? Use the table of contents below to find what you are looking for. If you cannot find the answer you need, contact the Purchasing Department and we will help you out.

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Quick overview

To access your Jaggaer portal, log into [myCampus](#), and click on the Jaggaer icon.

The screenshot shows the La Sierra University Marketplace interface. At the top, there is a navigation bar with the university logo, user name, and search bar. Below this is a breadcrumb trail: Shop > Shopping > Shopping Home > Home/Shop. A search bar contains the text "Shop Everything". Below the search bar, there are links for "Go to: advanced search | favorites | forms | non-catalog item | quick order | Browse by categories | contracts | chemicals".

On the left side, there is a sidebar with navigation icons and text: "As you may or may not know, Jaggaer (SciQuest) is your go-to place for making all of your business-related purchases! Please see the resources below, and feel free to contact us if you have any questions." Below this is contact information for the Purchasing Department: "purchasing@lasierra.edu (951) 785-2258".

At the bottom left, there is a section titled "Shopping with Lands' End Business Outfitters site:" followed by a numbered list of instructions:

1. Visit the La Sierra Lands' End site [through this link](#).
2. Go through check-out process (you will need to create an account if you don't already have one set up), and select "Account Payment" for the billing type. Place order.
3. Create a non-catalog cart for the amount of the order and submit it for approval.

On the right side, there are several vendor logos: Fisher Scientific, CAROLINA, SIGMA-ALDRICH, and VWR. Below these is a logo for GRAINGER. A callout box points to the GRAINGER logo with the text: "These are the Jaggaer [PunchOut vendors](#). If you want to make purchases through any of these vendors, simply click on their icon and you will be redirected to their online store."

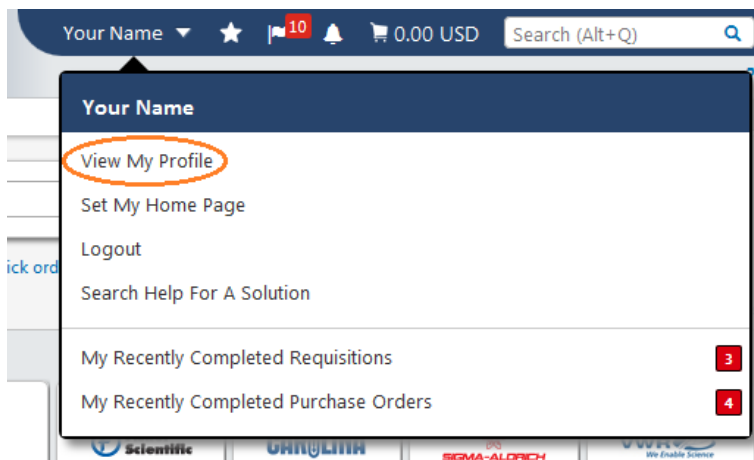
Five callout boxes provide additional information:

- Top left: "If you ever need to search for old Requisitions or Purchase Orders, you can utilize the Search option that is found here." (points to the search bar)
- Top center: "By clicking on your name, you are able to edit profile settings, view recent Requisitions and Purchase Orders, and more." (points to the user name)
- Top right: "On the Action Items page, you can view and take action on Requisitions." (points to the Action Items icon)
- Top right: "In the Notifications tab, you can view recent notifications." (points to the Notifications icon)
- Top right: "This is your cart. From here you can proceed to checkout or assign your cart to another user." (points to the cart icon)
- Center: "If you need to make a purchase from a supplier that does not have a PunchOut, you will click on the non-catalog link here, and fill out the form that is pulled up." (points to the "non-catalog item" link)

Getting started

To make sure everything is in order with your Jaggaer account, follow these first few steps to avoid confusion and ensure you receive important notifications.

1. Click on your name at the top of the Jaggaer page and navigate to **View My Profile**.



2. On the page that pulls up, enter your first and last name, your office phone number, and your La Sierra University email. Click the “Save” button once you have finished entering this data.

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

First Name

Last Name

Phone Number

Country Code, Area, Phone Number, Extension

E-mail Address

User Name

Authentication Method

3. [Set your approval code](#), if you are an approver.
4. [Set your default user settings](#) to make the checkout process easier.

Setting profile defaults

1. Click on your name at the top of the Jaggaer page and navigate to **View My Profile**.
2. Click on **Default User Settings** in the menu on the left of your screen.
3. Select **Custom Field and Accounting Code Defaults**.

- a. Under the **Codes** tab, you can set a default value that will automatically enter in on your requisitions.
- b. Under the **Code Favorites** tab, you can create several saved codes with nicknames, which can be accessed through a dropdown menu in the Accounting Code section when checking out.

Name	Default Value	Description	Edit Values
Chart	No Default Value		Edit
Fund	No Default Value		Edit
Organization	No Default Value		Edit
Account	No Default Value		Edit
Program	No Default Value		Edit

4. Select **Default Addresses**

- a. Under the **Ship To** tab, you can click the “Select Addresses for Profile” button.
- b. Select address template, which is likely CAMPUS.
- c. Edit fields and save.
- d. **Do not enter any Bill To addresses**, as this is already a default in our system.

No addresses defined in profile.

Ship To Bill To

Select an address to edit

Select Addresses for Profile

No addresses defined in profile.

Shipping Addresses

Select Address Template

Select Address Template: CAMPUS

5. Select **Cart Assignees**

This option can be utilized if you regularly assign carts to certain people, so you do not have to search for them each time.

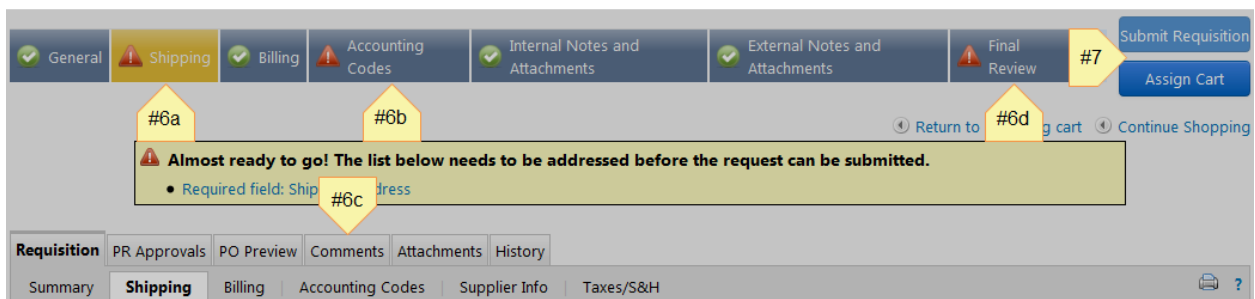
- a. Click the “Add Assignee...” button. This will pull up a pop-up window.
- b. Search for a user, and click **[select]** once you find your desired assignee.
- c. Add more people as needed.

Add Assignee...

Name	Action
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Shopping through a PunchOut

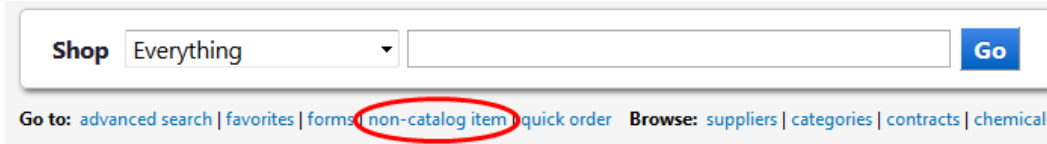
1. On the Jaggaer homepage, click on your desired vendor's [PunchOut icon](#). You will be redirected to the vendor's website.
2. Shop and create a cart as you normally would.
3. Click on "Check Out." This will redirect you back to Jaggaer.
4. Set appropriate commodity codes to all line items.
5. Click "Proceed to Checkout" button at top right of your screen.



6. Click on items in progress bar that need your attention
 - a. Set shipping address. Make it easier by [setting a default address](#).
 - b. Set accounting codes. Make it easier by [setting a default code](#).
 - c. Add comments applicable to your order that you want approvers to see.
 - d. Do a final review over everything, making sure quantities and prices look correct.
7. [Assign cart if you need to](#), or submit it for approval.
8. [View status of requisition](#).

Shopping with a non-catalog supplier

1. On the Jaggaer homepage, click on “non-catalog item,” which is found under the center search bar. This will pull up a pop-window.



The screenshot shows a search bar with the word "Shop" on the left, a dropdown menu set to "Everything", and a "Go" button on the right. Below the search bar, there is a navigation menu with links: "Go to: advanced search | favorites | forms | non-catalog item | quick order" and "Browse: suppliers | categories | contracts | chemicals". The "non-catalog item" link is circled in red.

2. Select your desired supplier. See [shopping with an unknown supplier](#) if you cannot find your vendor.
3. Set Product Description to the item title, along with any pertinent details, such as color and size.
4. Set Catalog No., as found on supplier's website or quote.
5. Set Quantity and Price Estimate.
6. **Keep Packaging at “EA – Each”.**
7. Select the appropriate Commodity Code, and then click either the “Save and Add Another” button, or “Save and Close,” depending on whether or not you have more items you need to add to your cart.
8. Once finished, click on the cart icon at the top right of your Jaggaer screen. You can choose to view your cart, or begin the checkout process.
9. Complete checkout process [as you would with a PunchOut order](#). If you have a quote for the order, be sure to add it as an External Attachment to the requisition (see next page).

General Shipping Billing Accounting Codes **Internal Notes and Attachments** External Notes and Attachments Final Review

Submit Requisition Assign Cart

#9a #9b Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: External Notes and Attachments. Go straight to the end: Final Review.

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing Accounting Codes Supplier Info Taxes/S&H

Hide value descriptions

Internal Notes and Attachments ?

These values apply to all lines unless specified by line item

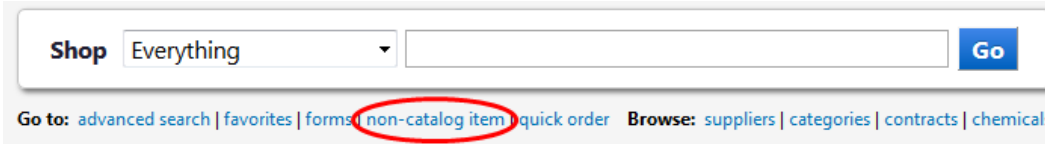
Internal Note no note Add notes here edit

Internal Attachments Add Attachments Add attachments here

- a. To add a note or attachment you want only your approvers and the Purchasing Department to see, click on the **Internal Notes and Attachments** tab on the progress bar, and edit as necessary.
- b. To add a note or attachment you want the supplier to see/receive, click on the **External Notes and Attachments** tab on the progress bar, and edit as necessary.

Shopping with an unknown supplier

1. On the Jaggaer homepage, click on “non-catalog item,” which is found under the center search bar. This will pull up a pop-window.



The image shows a search bar with the word "Shop" on the left, a dropdown menu set to "Everything", a search input field, and a blue "Go" button. Below the search bar is a navigation menu with links: "Go to: advanced search | favorites | forms | non-catalog item | quick order" and "Browse: suppliers | categories | contracts | chemicals". The "non-catalog item" link is circled in red.

2. Set supplier as “not known.”
3. Continue through [checkout as you normally would](#) with non-catalog suppliers.
 - a. As you check out, add an Internal Note (found in the progress bar) stating the vendor you wish to purchase from, and attach any pertinent quotes or other documentation.

Before the order can be complete, it is vital that the Purchasing Department receives a [W-9 form](#) from the vendor. It is a good business practice to provide the Purchasing Department with this information prior to submitting your requisition. If you have a contact at the company, it may be fastest to contact them directly to ask for this. Otherwise, the Purchasing Department will contact the company and wait for the form. This may take some time. It is important that you contact the Purchasing Department after you have submitted the requisition and tell them where you are planning to buy from, and let them know if you have already contacted the vendor for their W-9 form. This will ensure prompt and accurate processing once your requisition comes for purchasing review.

Assigning a cart

All faculty and staff at La Sierra University have access to Jaggaer through their myCampus portal. This does not necessarily mean that every user can submit a requisition, though. To submit a requisition, you must have Banner access to the budget you wish to charge. If you do not have this access, you will need to assign your cart to your approver or appropriate department head. If you do not do this, your requisition will be returned and not processed until proper procedure is followed.

1. In the checkout process, fill out everything you can in the progress bar.

2. Move up to the top right and click the “Assign Cart” button.

This will pull up a pop-up window.



3. If you have a [default assignee](#), you can easily select them from the dropdown menu. Otherwise, search for and select the user you wish to assign the cart to.

4. To avoid any confusion later on, write a brief note to the person you are assigning to, and then click the “Assign” button. This will send the cart to your assignee, and they will complete and submit your requisition.

Approving a requisition

There are two ways of approving a requisition. You can do it directly through your email if you have set up an approval code, or you can approve through your Jaggaer portal.

1. To approve through your email, you will need to [set up an approval code](#).
 - a. You will receive an email whenever a requisition needs your approval.
 - b. In the email message, there will be a link that you can click to take action, and then you will be prompted to enter your approval code.
2. To approve through your Jaggaer portal, click on the flag icon at the top of the Jaggaer homepage. This will take you to the Action Items page.
 - a. Click on the requisition number to take you to the review page.
 - b. Review the order to make sure it looks appropriate, and make adjustments as necessary.
 - c. In the top right corner, there is an Available Actions dropdown menu. Set it to “Approve/Complete Step” and click the “Go” button.



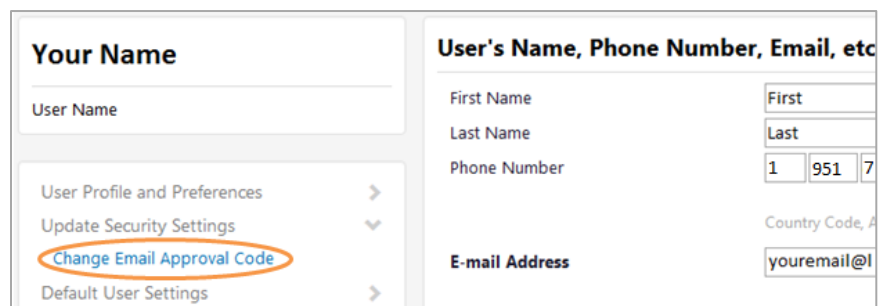
The screenshot shows a user interface for searching and acting on requisitions. At the top, there is a search bar with the text "Requisition Number(s)" and a dropdown arrow. Below this, there is a section labeled "Available Actions:" followed by a dropdown menu currently set to "Approve/Complete & Show Next" and a blue "Go" button.

Setting approval code

By setting up an approval code, you will be able to take action through email in any **future** requisitions.

You will still need to log in to your Jaggaer portal for any pending requisitions you had prior to making an approval code.

1. Click on your name at the top of the Jaggaer homepage and navigate to **View My Profile**.
2. Click on **Update Security Settings** in the menu on the left of your screen.



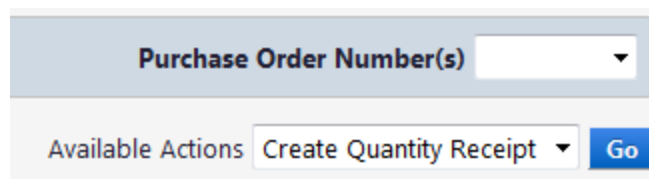
Your Name		User's Name, Phone Number, Email, etc	
User Name		First Name	First
		Last Name	Last
		Phone Number	1 951 7
		Country Code, A	
User Profile and Preferences	>	E-mail Address	youremail@l
Update Security Settings	▼		
Change Email Approval Code			
Default User Settings	>		

3. Select **Change Email Approval Code**. This will pull up a pop-up menu.
4. Create a code of your choosing. **Be sure to write it down somewhere so you can remember it**; the Purchasing Department does not have a way to look up your code if you forget it.
 - a. You can always reset your approval code by logging into your Jaggaer portal and following the steps above if you forget your code.

Creating a Quantity Receipt

You will usually get notified when orders need a [quantity receipt](#), but you should also just make it a habit to do this whenever you receive a package.

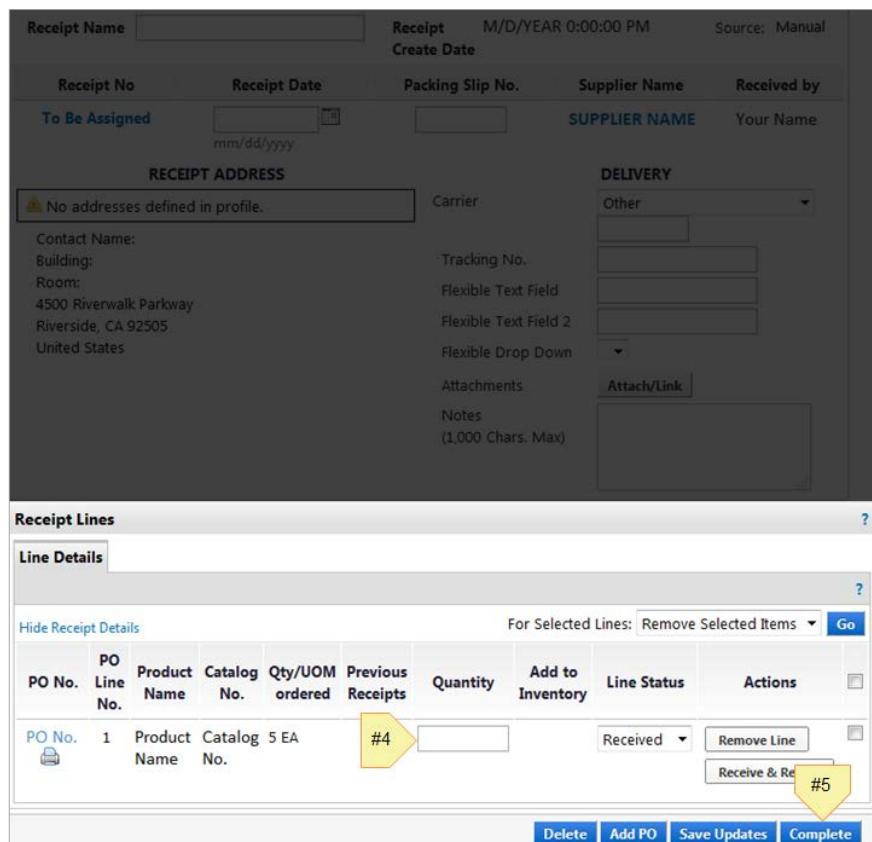
1. Navigate to the Purchase Order that needs a receipt.
2. In the top right corner, there is an Available Actions dropdown menu. Set it to “Create Quantity Receipt” and click the “Go” button.



Purchase Order Number(s) [dropdown]

Available Actions Create Quantity Receipt [dropdown] Go [button]

3. Jaggaer will pre-populate the data on the top half of the page. You do not need to update any of the information there.
4. In the **Line Details** section, update Quantity as appropriate. Your order may come in different shipments, so be sure to set received quantity appropriately. For this reason, you may have multiple receipts for one Purchase Order.
5. Click the “Complete” button at the bottom once you have finished.



Receipt Name [input] Receipt M/D/YEAR 0:00:00 PM Source: Manual
Create Date

Receipt No	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	[input]	[input]	SUPPLIER NAME	Your Name

mm/dd/yyyy

RECEIPT ADDRESS

No addresses defined in profile.

Contact Name: [input]
Building: [input]
Room: [input]
4500 Riverwalk Parkway
Riverside, CA 92505
United States

Carrier: [input]
Tracking No. [input]
Flexible Text Field [input]
Flexible Text Field 2 [input]
Flexible Drop Down [input]
Attachments [input]
Notes (1,000 Chars. Max) [input]

DELIVERY Other [dropdown]

Attach/Link [button]

Receipt Lines

Line Details

Hide Receipt Details For Selected Lines: Remove Selected Items [dropdown] Go [button]

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
PO No.	1	Product Name	Catalog No.	5 EA	#4	[input]	[input]	Received [dropdown]	Remove Line [button] Receive & Re [button]

Delete [button] Add PO [button] Save Updates [button] Complete [button]

When a requisition is returned

You will receive an email notification whenever something goes wrong with your requisition. In the email, be sure to view any notes that were attached at the time of return. This message will explain why your requisition was returned or rejected. Common causes are an insufficient budget to carry out the transaction or no authority to post to a certain budget. Sometimes, an approver or the Purchasing Department may reject a requisition, and reasons will also be listed in the email. Take appropriate actions (request a budget transfer, call rejecter, etc.) and once the issue has been resolved, you can resubmit the requisition.

Viewing order status and history

To view the current status of your order, there are several options. If it was ordered through one of the [PunchOut suppliers](#), enter the PunchOut to view your recent orders. There you will be provided with tracking information. If it was a [non-catalog supplier](#), you can first view the history tab of your requisition to make sure it was approved and converted to a purchase order. From there, you can contact the Purchasing Department with your inquiry.

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	M/D/YEAR 0:00 PM	System	Banner Budget Authorization	Requisition returned				
	M/D/YEAR 0:00 PM	System		Requisition returned		empty		Returned by banner
Line 1	M/D/YEAR 0:00 PM	System		Requisition Line item returned			User 2	Item 1, Sequence 1: Insufficient budget for item 1, sequence 1, suspending transaction.
	M/D/YEAR 0:00 PM	User 2		Requisition modified	Accounting Date	empty		
	M/D/YEAR 0:00 PM	User 2		Requisition submitted				
	M/D/YEAR 0:00 PM	User 2		Requisition modified				
	M/D/YEAR 0:00 PM	User 1		Requisition assigned		User 1	User 2	Your note to assignee.
Line 1	M/D/YEAR 0:00 PM	User 1		Requisition modified	Commodity Code	empty		
Line 1	M/D/YEAR 0:00 PM	User 1		New Line added	PunchOut	empty		

If your requisition has been returned, you are able to see why here.

In history, you may see comments that have been added to the requisition.

Shopping with Lands' End

We have a special system set up with Lands' End to ensure orders are placed correctly. The process is not quite as simple as using a PunchOut, but if you follow the steps below, you should not have any problems placing an order.

1. Start at the [La Sierra Business Outfitters website](#).
2. Shop online to create your cart. Be sure to add your desired logo to the items you are ordering.
3. Once you are ready, view your cart and click the "Start Checkout" button on the right of the screen. You can also add any promotional codes on this page.
4. You will need to log in to your Lands' End account. If you don't already have one, you can easily create an account on this page.
5. Be sure to set your shipping address and select your shipping method. In the Billing section, select "Account Payment," and then you can review and place your order. Take note of the order total while on this page.
 - a. By doing this, an email will be sent to the Purchasing Department to review and approve the purchase.
6. Move back to Jaggaer, and [begin a non-catalog cart](#).
 - a. In Product Description box, include a description of what you ordered. An example might be "Polo shirts for student workers in Accounting Office."
 - b. Set the estimated price as whatever the order total was when you were checking out on the Lands' End site.
7. Continue through [checkout as you normally would](#) with non-catalog suppliers.
8. Once the requisition is received by Purchasing, they will approve the order via email and your order will be placed.

Ordering business cards

1. Enter the Office Depot PunchOut.
2. Hover over the **Copy & Print** section, and click on **Brand Identity**.
3. This will take you to the La Sierra University custom stationery product list. Select and customize as you need, and proceed to [checkout as you normally would](#) with PunchOut suppliers.

Be aware that changes cannot be made once your requisition has been submitted. *You are responsible for proofing your items for spelling and grammar, correct phone numbers, and any other custom information. Changes cannot be made and returns will not be accepted for custom orders. It is your responsibility to review the proof and ensure all information is correct prior to submitting your requisition.*

Airline tickets, hotel reservations, and similar purchases

If you wish to purchase airline tickets, make a hotel reservation, register for a conference, or make a similar purchase, do it through the Purchasing Department!

1. Fill out a [travel authorization form](#) and obtain proper approvals.
2. Gather all applicable data (vendors, pricing, etc.) and [create a requisition in Jaggaer](#). If your preferred vendor is not in our system, follow [these steps](#) to submit your requisition.
3. Once you have submitted your requisition, contact the Purchasing Department to make an appointment.
 - a. Bring a copy of your travel authorization form to your appointment for their records.
 - b. During your appointment, you will come to the Purchasing Department and do your online shopping at a computer there. When it is time to check out, someone there will enter the University credit card and billing information.

Costco and Office Depot Cards

The Purchasing Department has one Costco card and two Office Depot cards available for employees to loan out. The Costco card is available to use whenever you would like to buy items there. The Office Depot cards are available to use for print and copy at our local store.

1. Contact the Purchasing Department to request a paper requisition. This is the **only** time that it is appropriate to use a paper requisition, opposed to utilizing Jaggaer.
 - a. Be sure to properly indicate the vendor you want to use and the accounting code(s) you want to charge.
 - b. It is not necessary to itemize each individual item you are planning to buy. It is acceptable to put an estimate as to how much you will spend, as long as you specify the purpose of the shopping trip.
 - i. i.e. "Snacks for department picnic on November 4. \$200"
 - c. It is vital that you obtain the proper approving signatures at the bottom of the requisition prior to turning it in. If these signatures are not present, you will not be able to take out the card.
2. Turn in the paper requisition to the Purchasing Department.
3. Go to the store.
 - a. At Costco, you will need to check in at the kiosk prior to shopping and checking out.
 - b. At Office Depot, just go through check out as you normally would, using the University card as payment method.
4. Bring the original receipt and University card back to the Purchasing Department.

It is important to note that the University cards are only available to use during one business day. You cannot check the card out over the weekend or after 4:00 pm. You must bring it back the same day as checkout.

Summary of purchasing process

1. A department has a need.
2. A cart is filled out and submitted in Jaggaer.
3. The budget is automatically checked by Banner.
4. A requisition is created.
5. The requisition goes through an approval process.
6. The requisition goes under purchasing review.
7. The requisition is approved by the Purchasing Department.
8. The budget is automatically checked by Banner.
9. A Purchase Order is created and sent to the vendor.
10. The vendor fulfills the order.
11. The vendor sends an invoice to Accounts Payable.
12. Accounts Payable verifies the receipt of order.
13. Accounts Payable cuts a check to the vendor.

Terminology

Non-catalog Supplier

A non-catalog supplier is any vendor that does not have a PunchOut icon on the Jaggaer homepage. To make a purchase from a non-catalog supplier, you will need to enter a non-catalog item. See more [here](#).

PunchOut Supplier

A PunchOut supplier is one of the select vendors that has an icon on the Jaggaer homepage. These vendors have set up a contract with La Sierra University, not only to make shopping easier, but also to provide competitive prices for their goods. See more [here](#).

Purchase Order

A Purchase Order is the formal document that is sent to a supplier for order fulfillment. The Purchase Order is created from the requisition, so it is important that all information is appropriately displayed on the requisition.

Quantity Receipt

A quantity receipt records the receipt of your items. If this record is not entered in to our system, the invoice will not be paid.

Requisition

A requisition is the document that requests the creation of a Purchase Order. A shopper completes a requisition through the various Jaggaer shopping options (PunchOut, non-catalog) and submits it for approval.