University of Idaho

JAGGAER

eProcurement Training

QUICK REMINDERS

- Replaces Banner Purchase Orders and Requisitions

- Idaho State Board of Education Directive

- U of I Policies and Procedures remain the same

- Use Pcard for purchases <$5k

OBJECTIVES

YOU WILL LEARN:

- What is JAGGAER

- How to purchase goods and services

- Roles and responsibilities in JAGGAER

- Key capabilities of each role

- High-level process overview

JAGGAER

- JAGGAER is an online eProcurement system

- JAGGAER replaces Banner requisitions and purchase orders

- JAGGAER also replaces VandalWeb contracts module

- U of I, BSU, ISU, and LCSC are now using JAGGAER per the Idaho State Board of Education directive

- The Goal: for each institution to save money through collaboration and competitively bid contracts

PURCHASING GOODS

HOW TO PURCHASE ITEMS IN JAGGAER

- Log into JAGGAER through single sign-on (SSO)

- Two vendor types: PunchOut Vendors; Non-PunchOut Vendors

- PunchOut Vendors are listed on the landing page

- PunchOut Vendors are competitively bid contracts

- PunchOut Vendors allow for higher dollar purchases with no bid

- Non-PunchOut Vendors follow purchasing bid limits ($10K+ require bid)

PUNCHOUT VENDORS

Amazon Business
Everything from A to Z

Anixter
Wire and cable,
networking, security,
power supplies

B & H
Digital cameras, photography
equipment, TVs, audio-visual
supplies

Fisher Scientific
Lab equipment and
supplies

Grainger
Industrial-grade
supplies and safety
products

Henry Schein
Healthcare products

PUNCHOUT VENDORS

Home Depot Pro
Cleaning and janitorial, paper products, personal protection, plumbing, lighting

McKession
Medical supplies, and care management tools

Medline
Medical Supplies

ODP (Office Depot)
Office supplies

Staples
Office supplies

ThermoFisher Scientific
Scientific instruments, reagents and consumables

VWR
Life science products

PURCHASING POLICY

## VENDORS – PCARD – PURCHASE ORDERS

- PunchOut Vendors – No Bid Required:

  - Order must be issued through JAGGAER

  - Up to $50,000: JAGGAER issues PO

  - Over $50,000: Purchasing Services issues PO

- Non-PunchOut Vendors:

  - Up to $5,000: Pcard or PO

  - $5,000 to $10,000: PO issued through JAGGAER; no bid required

  - $10,000: Requisition in JAGGAER; Bid required; PO issued by Purchasing Services

BUSINESS PROCESS OVERVIEW

Cart

Shopping

- PunchOut Vendor shopping
- Non-PunchOut shopping

Requisition

Requisition

- User-friendly shopping and requisition creation
- Include attachments
- Requisition workflow
- Allocate chart fields across departments

Requisition Approval

Approval(s)

- Depending on dollar amount and Index, Purchasing, OSP, EHS Approvals

Purchasing

- Non-PunchOut Vendors require bids over $10K
- PunchOut Vendors: Issue PO for greater than $50K

Purchase Order

Requisition

- Direct PO capability replaced with Requisition
- POs sent to suppliers on approval

Invoice Entry

Invoice

- Increase in PO invoices
- Non-PO Payment Request entered by campus
- Electronic Invoices
- Invoice Owner confirms goods received by approving invoice

Matching

2-way Match

- PO / Invoice
- Exception tolerance 10% or $100, whichever is less

Invoice Approval

Approval

- Exception Processing

Payment

Payment

- Moving away from check as much as Possible to electronic payments

ROLES

SHOPPER
ROLE & RESPONSIBILITIES

- Faculty and Staff will be Shoppers.

- Shoppers will add items to their shopping cart.

- Shoppers will assign their cart to their department Requester.

- Shoppers should add notes to their carts, including Index.
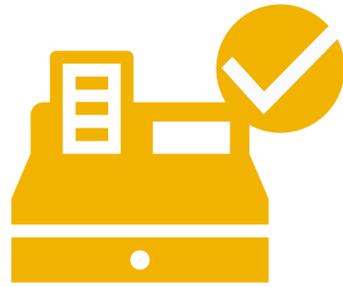
REQUESTER
ROLE & RESPONSIBILITIES

Requesters are departmental financial employees. Responsibilities include:

- Creating requisition from Shopper's shopping cart

- Assigning accounting information (FOAPAL)

- Verifying shipping information

- Review and confirm attachments

- Adding comments to requisitions
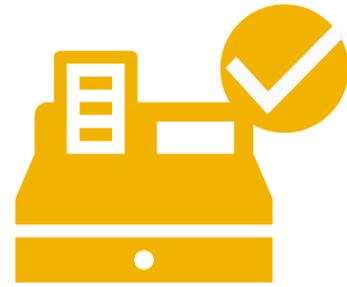
REQUESTER
ROLE & RESPONSIBILITIES (CONT.)

Shopping and cart management:

▌ Receive shopping carts assigned by a Shopper

▌ Monitor and maintain assigned shopping carts

▌ Review and add comments, notes, and attachments

▌ Return shopping carts to Shoppers as needed

ROLES AND PERMISSIONS

OVERVIEW

Purchasing	• Approve/Return Requisition
Requesters	• Submit Carts • Edit Carts
Shoppers	• Create Carts • Assign Carts to Requesters

Accounts Payable

• Create Invoice
• Resolve Match Exceptions
• Approve/Return Invoice

NEXT STEPS

TO DO:
GETTING STARTED

- Set default shipping address

- Set favorite pages

- Set assigned requester

- Basic navigation

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