Jaggaer e-Procurement

Non-Catalog Item Requisition

Requester: Non-catalog Item Purchase

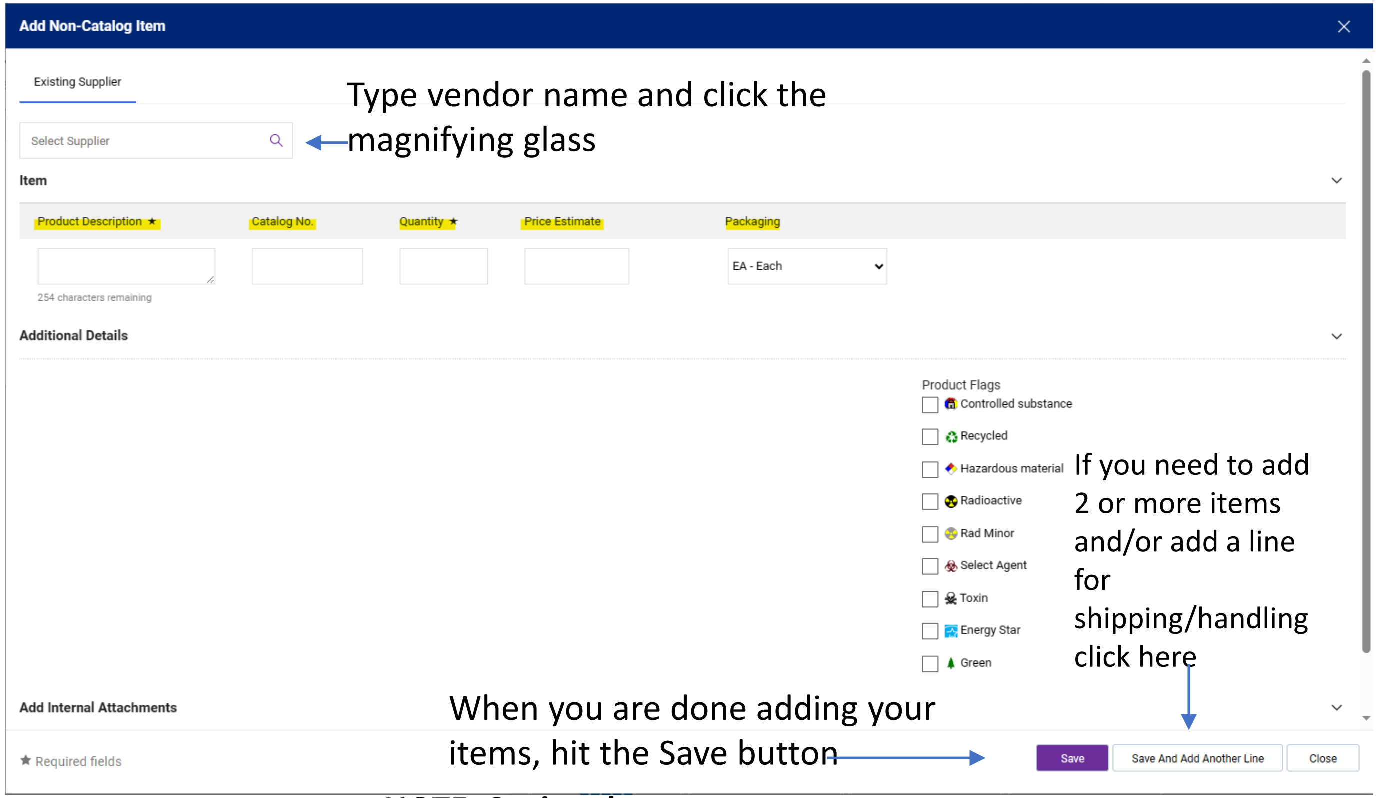
Non catalog purchases

- Select shop from the left hand menu
- Roll your mouse over Shopping
- Go to: Non-Catalog Item
- When you click on non-catalog item, the following screen will appear.

Enter product description, item number, quantity, price and packaging.

NOTE: When adding a line for shipping/handling select USD as the packaging option

You can attach a quote or other pertinent information



Type vendor name and click the magnifying glass

If you need to add 2 or more items and/or add a line for shipping/handling click here

When you are done adding your items, hit the Save button

NOTE: Saving does not mean the requisition has been submitted.

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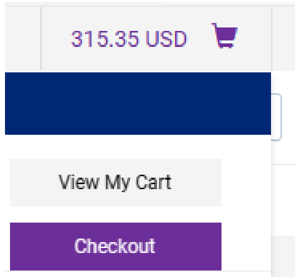
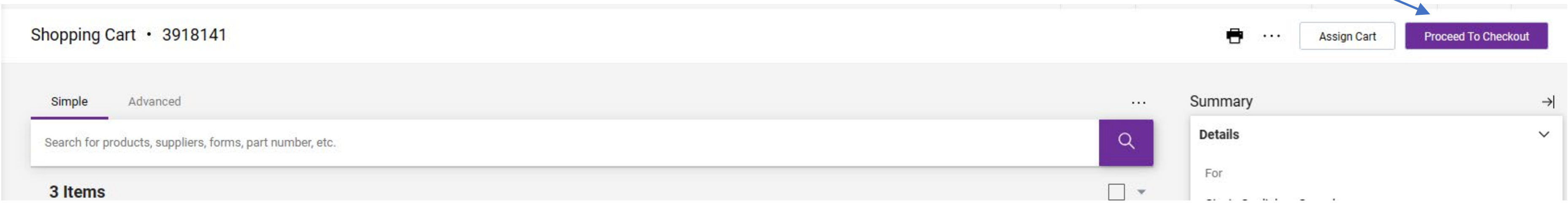
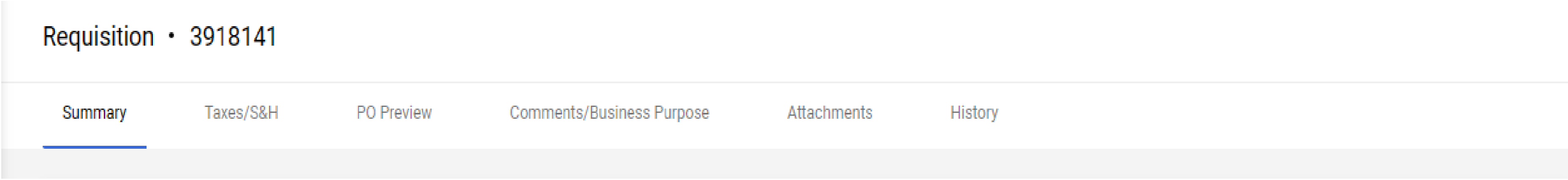
After you save, your items will be in your cart. To access your cart, click on the shopping cart icon on the upper right hand corner of the screen. Select View My Cart



The vendor and items will display on the screen. From here you need to click on Proceed to Checkout to continue the requisition process.



When you Proceed to check out it will open your requisition summary tab.



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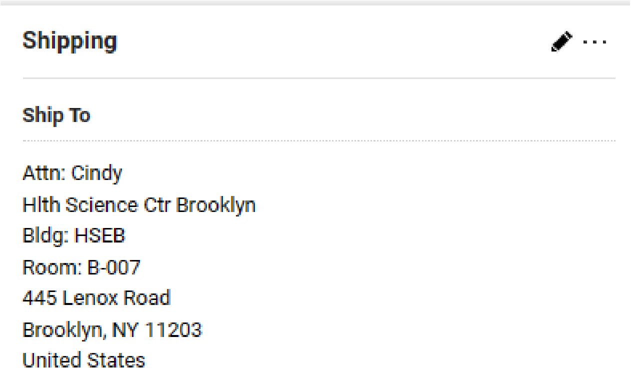
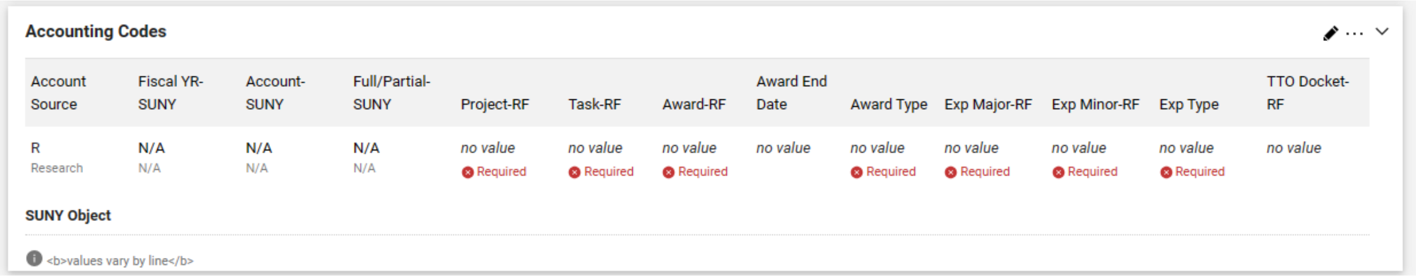
Checkout Process

The Requisition has 6 tabs: Summary, Taxes/S&H, PO Preview, Comments/Business Purpose, Attachments and History

You will be directed back to the requisition summary tab which has the following sections: General, Shipping, Billing, Purchasing Information, Accounts Payable, RF Approval Certification, Accounting Codes, Internal and External Notes and Attachments, Item lines. There are 2 sections that you must complete, shipping and accounting codes.





If you would like to include a message with your requisition you can do so by clicking the Comments/Business Purpose Tab. In addition, you also have the availability to upload documentation by clicking the Attachment tab.

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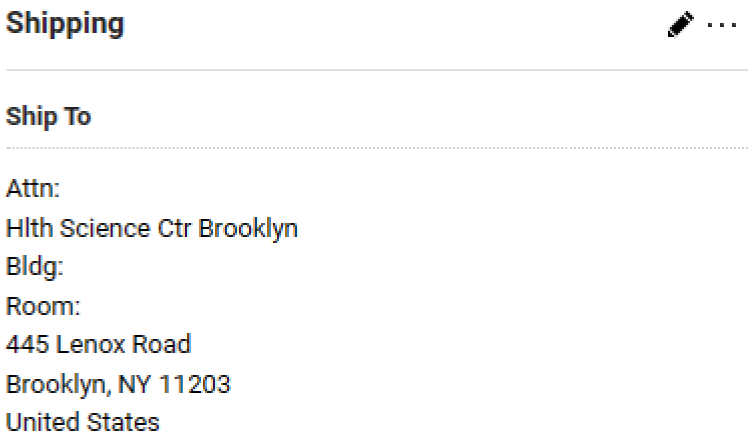
Checkout Process

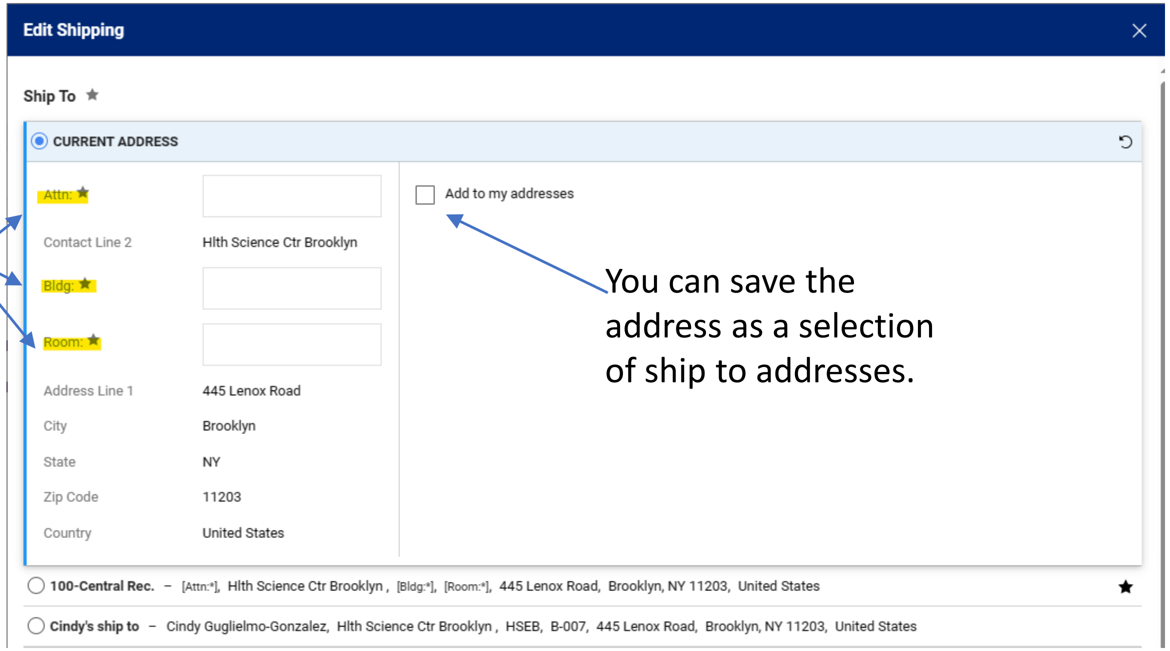
The summary tab contains the following sections: General, Ship to, Biling, Purchasing Information, Accounts Payable, RF Approval Certification, Accounting Codes, Internal and External Notes and Attachments, Item lines. There are 2 sections that you must complete, shipping and accounting codes.

General Section: Shipping is required information

You must add the recipient's name and office location where the package is to be delivered. To edit this section click on the

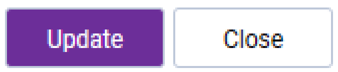


Add Attn, Bldg and room



You can save the address as a selection of ship to addresses.

After you edit your shipping to include attention name, building and room, click on the update button on the bottom right of the screen



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<u>Accounting Codes: This is a required section</u>

You will need to enter the Project, Task, Award and Expenditure Type. To edit this section click on the pencil

Accounting Codes

Account Source	Fiscal YR-SUNY	Account-SUNY	Full/Partial-SUNY	Project-RF	Task-RF	Award-RF	Award End Date	Award Type	Exp Major-RF	Exp Minor-RF	Exp Type	TTO Docket-RF
R Research	N/A N/A	N/A N/A	N/A N/A	*no value* Required	*no value* Required	*no value* Required	*no value*	*no value* Required	*no value* Required	*no value* Required	*no value* Required	*no value*

After you click the pencil to edit, it opens the required fields below.

Refer to the expenditure type description list to chose the type that best fits the expense.

Accounting Codes

Project-RF ★	Task-RF ★	Award-RF ★	Award End Date	Award Type ★	Exp Major-RF ★	Exp Minor-RF ★	Exp Type ★
No Value Required	No Value Required	No Value Required		No Value Required	Required	Required	No Value Required

Click on the magnifying glass to search for your project number

Click on the arrow for the drop down list of Exp Major categories

After you have populated all your accounting code fields, click the Save button on the bottom right of the screen

Save Close

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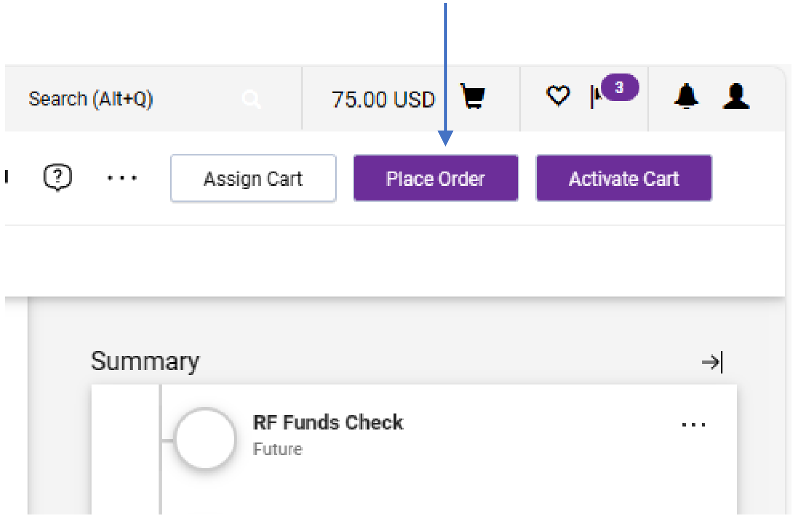
<u>Internal Notes and Attachments - External Notes and Attachments</u>

If you have any quotes, approvals or other pertinent information that should be attached to the requisition you have the opportunity to do so in this section.

Internal Notes/Attachments can be used for notes to grant owner, grant manager and buyer. **Internal Attachments** should be used for quotes, IT/department approvals.

External Notes/Attachments should ONLY be used for instructions that you need to communicate to the vendor. For example, referencing account number and/or quote number, requiring a specific lot number, dry ice needed, etc. **External Attachments** should be used to attach the vendor's quote and or other attachments the vendor requires for the order.

After you have completed your Requisition click place order on the upper right hand side of your screen to submit the requisition for grant owner approval.



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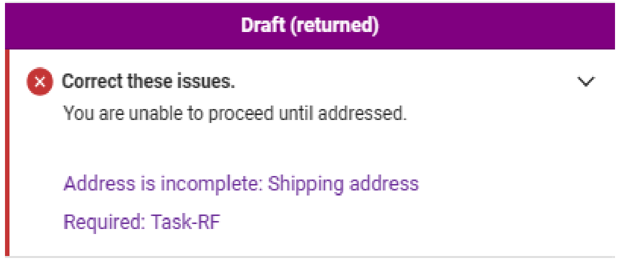
Any required information that maybe missing will show in your summary to the right of the screen.
If you click on each of the issues it will direct you to the section where the information should be completed.



You can also view the requisition workflow including approvals and account validations. If you click on the purple tasks, it will provide the name of the person assigned to that step.