JAGGAER ONE

eProcurement

Handbook for Users and Administrators

Product Version: 23.2

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Welcome to eProcurement

Objectives

The purpose of this handbook is to familiarize users with tasks related to eProcurement.

- In the **Shopping and Ordering** section, we hope it will help to familiarize users with site shopping tasks.

- In the **Contract Compliance Tracking** section, we hope it will help you to understand how to create contracts and how to manage them once they are created.

Key Points

- The goal of this handbook is to educate users about shopping and contract compliance tracking using JAGGAER's eProcurement solution. Keep in mind that your set up may vary based on which solutions are licensed and in-use within your organization. Please contact your System Administrator if you are unsure of which solutions your organization is using.

- It is also important to note that much of the how, when, and why the system is used is determined by your organization's business practices. We suggest that you supplement this document with your organization's business practices, goals, and policies.

- Shopping tasks range from selecting items for purchase, checking out, consolidating orders and approving orders. Contract tasks including creating contracts and managing them once they are created. It is important to note that all end-users do not have permissions to perform each of the tasks. For example, you may only be permitted to add items to a cart and submit it for approval, or you may only be able to create certain types of contracts. If you have any questions about your specific permissions, please contact your system administrator.

- A basic understanding of JAGGAER applications is required. This handbook should be used as a supplemental guide to the Handbooks provided with the JAGGAER suite of products. Many of the fundamental concepts discussed in this book are detailed in the additional handbooks.

What you will learn…

The document is organized into the following sections:

In the **Shopping and Ordering** section, you will learn about site shopping tasks such as:

- **Selecting Items for Purchase** - Including item search methods, purchasing contract items, using forms, creating non-catalog orders and using favorites.

- **Shopping Carts and Checkout**- Including how to create and manage shopping carts, check out methods and using shared cart.

- **Order Consolidation** - Including how to merge orders from a single supplier to a single cart.

- **Order Approval** - Including how to locate and manage orders that have been submitted for your approval.

In the **Contract Compliance Tracking** section, you will learn about creating and managing contracts.

Basics

eProcurement Permissions and Notifications

Overview

The sections below describe permissions and notifications related to eProcurement configuration and administration. Keep in mind that your setup may vary based on which products are licensed and in use within your organization. Please contact your System Administrator if you are unsure of which products your organization is using.

It is also important to note that much of the how, when, and why the system is used is determined by your organization's business practices. We suggest that you supplement this information with your organization's business practices, goals, and policies.

Shopping Cart and Requisition Permissions

The following are permissions related to eProcurement configuration and administration. Permissions may be configured at the role or user level by an administrator. **Note:** We recommend managing permissions through user roles rather than assigning permissions to each user. Local changes will override user role permissions.

For additional information about enabling permissions at the user level, please see **Permission Settings** in the **Site Essentials Handbook** or online searchable help. For additional information about enabling permissions at the role level, please see **Creating and Managing Roles** in the **Administration and Configuration Handbook** or online searchable help.

Important: If your organization uses the eProcurement Contract Compliance Tracking feature, you should be aware that there are several permissions related to that module. Please see **Permissions** in the **Contracts+ Handbook** or online searchable help for additional information.

Shopping Permissions

These permissions are located in **Permissions Settings > Shopping, Carts & Requisitions > Shopping**.

Permission	Permission Description
Hosted Catalog Search	Ability to perform searches across the hosted catalog only.
PunchOut	Ability to access Punch-out vendors.
View/Use Forms	Ability to use all system-defined forms such as service form, supplier form, etc.
View/Use Non-Catalog Item	Ability to use the non-catalog item entry screen.
Non-Catalog Configuration	Allows a user to modify the standard Non-Catalog Form or Item.
Bypass Non-Catalog Search	When turned on, allows the user to bypass the required search of the hosted catalog for the item (by SKU) requested. To force a user to search the hosted catalog, turn this permission off.
Add/Edit Trade-Ins	This permission allows a user to add a trade-in item to a purchase.
Modify Order Distribution Information on Forms & POs	Allows the user to override and change the order distribution settings for a supplier master supplier in a form, as well as to do the same for any supplier on a PO, both in workflow and post-distribution (for re-sends). The user will be able to click a checkbox to edit the specific distribution information for a request. Any changes only affect the specific request and do not affect the settings in the supplier profile.
Create Free-form Supplier on Form Templates	Allows user to enter a new supplier when completing a form template. A user with this permission can enter a supplier outside of the supplier master list.
Create/Edit Forms	Provides a user the ability to create a new form template based on a form type of Capital Expenditure or Service.
View/Use Personal Favorites	Controls access to personalized favorites. Users with this permission can add favorites or personalized forms into personal folders.
Administer Shared Favorites	Provides the ability to create shared folders for favorites and forms, and document search, and add items (favorites, forms, and document search saved searches) to the folders. Shared folders can be organization-wide or for a specific group of users.
Create Shared Favorites Folders	This permission allows users to create and administer their own shared favorites folders. This permission does not allow users to edit carts created by others, create organization-wide shared folders, or access shared folders to which they are not added.
Import/Export and Administer Shared Favorites	This permission allows a user to import and/or export their shared favorite folders and items. It also gives the user the same permissions as Administer Shared Favorites.

Permission	Permission Description
View Product Compare	Provides the capability to use the product comparison feature in search results.
Chemical ReSource	Provides access to the Chemical Resource and Chemical Structure Search tool.
Antibody ReSource	Provides access to the Antibody Resource module.

Cart/Requisition Permissions

These permissions are located in **Permissions Settings > Shopping, Carts & Requisitions > Cart/Requisition**.

Permission	Permission Description
Prepare Req for Another User	This permission turns on the Prepared For field in the Header Information section of the requisition and is also required in order to be an "assignee" for a shopper assigning his/her cart. This field allows a user to order on behalf of another individual.
Do not permit Place Order	This permission prohibits the user from being able to complete the checkout process. The permission is OFF by default which allows the user to checkout and submit a cart for approval. Typically, this permission is granted to shoppers who assign carts instead.
Share cart with others	The permission gives the user the ability to share carts with others. A check-box will be visible on carts that gives the user the ability to turn on cart sharing for an existing cart user group. **Note**: This permission displays only if the organization is configured to allow shared carts.
Edit Shared Carts locked by Me	This permission allows users to edit values or delete shared carts that they, themselves have locked. Users with this permission can make updates to the cart name and description. They can also delete shared carts that they have locked or any unlocked shared cart. **Note**: This permission displays only if the organization is configured to allow shared carts.
Assign Cart to Another User	Provides the ability to assign a shopping cart to another user. The permission activates a new button on the cart page to perform this function. The user can select from a list of users that have the Prepare Req for Another User permission.
Edit User's Cart Assignees	Provides the ability to edit the cart assignee list in a user's profile. The cart assignee list is a list of users that are available to a user when attempting to assign a shopping cart to another user. The permission also allows a user to find other users not in their profile at the time they are performing the assignment.
View other user's draft carts	Enable this permission to view draft carts created by other system users. When viewing another draft cart, you are presented with a read-only view of the cart and its contents. For example, a user may call the Help line in the Purchasing Department and the support staff can see the user's screen. When viewing the draft cart the support staff will be looking at a read-only view of the user's cart and can assist the users with any questions they may have about completing their cart.

Permission	Permission Description
Delete other user's draft carts	Enable this permission to allow a user to delete draft carts that belong to other users.
Manage Assigned Carts	This permission allows a user to view the Manage Assigned Carts page. From here, a user can view all carts that have been assigned – by assignee or submitter – and reassign or unassign carts as needed.
Edit PO Number	Provides the user with the ability to define the PO number for a requisition prior to the actual PO being created (during PR workflow). This may be used to add a specific PO number to a requisition before it is distributed to the supplier.
Edit Credit Card	Provides the ability to edit the card numbers stored in a user's profile. If the user is authorized to edit the card number at checkout, if necessary, turn this permission on.
Edit Evaluated Receipt Settlement	A user with this permission can edit the ERS field on the Requisition and the Purchase Order.
Assign CV2 Code	This permission allows users to enter a CV2 code upon checkout. If the user is not authorized to edit credit card numbers, but can enter a CV2 code at checkout, turn this permission on.
Manually Override Pricing	This permission allows users to manually change pricing for hosted catalog items. Changes can be made in draft shopping carts as well as pending PRs and POs. The user must also have the Edit Pending PR/POs permissions to change pricing for pending documents.
Select Credit Card from Profile	Provides the ability to select a credit card number (if enabled) at checkout to apply to line items in the requisition. Card numbers are stored in a user's profile.
Header-level internal attachments	Provides the ability to attach internal documents and URLs at the header level in a requisition.
Header-level external attachments	Provides the ability to attach external documents and URLs at the header level in a requisition. Header level external attachments on a requisition are distributed on all fax or email POs generated by the requisition.
Line-level internal attachments	Provides the ability to attach internal documents and URLs at the line item level in a requisition.
Line-level external attachments	Provides the ability to attach external documents and URLs at the line item level in a requisition. Line level external attachments on a requisition are distributed on a fax or email PO to the specific supplier of that line item.
Allow editing of Tax, Shipping, and Handling	Allows a user to override system defaults and enter custom Tax, Shipping and Handling charges both in shopping carts and approvals (PR or PO).

Permission	Permission Description
Bypass Review	Ability to place a requisition without looking at the Review breadcrumb page.
View Line Item History	This permission allows a user to perform a line item history search. Line item history searches past requisitions and orders for the exact catalog item.
Withdraw PR	Provides the ability to withdraw a requisition or line item from PR workflow prior to PR approvals being completed.
Modify PO Clauses in PR/PO	For requisitions, controls the ability for users to add additional clauses. The user will also be able to remove clauses that have been added in addition to the clauses associated from the organization, supplier or contract. For purchase orders, controls the ability for a user to add and remove all clauses.
View Warnings for Potential Duplicate Items	Users with this permission will see a warning at checkout if an item they have selected has been recently ordered by another user. This permission is only displayed if the Duplicate Item Warning Settings feature is enabled (under Setup > General Site Settings > System Settings and Configuration).

Orders Permissions

My Orders/Organization Orders Permissions

These permissions are located in **Permissions Settings > Orders > My Orders/Organization Orders Permissions**.

Permission	Permission Description
View My Orders	Provides the ability to a user to view his or her orders through document search.
View Organization Orders	Provides the ability for a user to view all of the organization's orders through document search.
Edit Organization Orders	Provides the ability for a user to edit and update any organization orders.
View my Department Orders	Provides the ability for a user to view all orders belonging to their assigned department through Document Search.
View My Business Unit Orders	Provides the ability for a user to view all orders belonging to their assigned business unit(s) through Document Search. This permission directly correlates to the User's "User Access and Security > Access" settings. The user may have additional accessibility based on their "Access" assignments.

Permission	Permission Description
Revise PO	Allows a user to revise a purchase order once it has been sent to a supplier. This may be necessary in the event that there is a minimum quantity required or if the price changes, etc. This permission does not include the ability to resend a PO to a supplier. Users with this permission will see in Purchase Order History editable fields on the Summary and Details tabs, the **Finalize Revision** action in header Action list, and the Revisions tab.
Update Purchase Order Owner	Allows the user to update the Purchase Order Owner. For example, if someone else takes over the work group or leaves a company, any future invoices created against that Purchase Order will belong to the new owner.
Close purchase orders	Controls the user's ability to update the Accounting status of a purchase order. If this permission is on, the user will have the purchase order action to **Close PO** if the purchase order is currently open.
Open purchase orders	Controls the user's ability to update the Accounting status of a purchase order. If this permission is on, the user will have the purchase order action to **Open PO** if the purchase order has already been closed.
Resend PO to Supplier	Allows a user the same permissions as **Revise PO** as well as the ability to resend purchase orders to suppliers via fax or email. Resending a PO automatically creates a revision.
Resend PO to External System	Allows a user to resend an order to an external system via the PO export. This permission is only application with customers that have an export integration.
Export Search Results	Provides the ability to export information from the document search results for PRs, POs, Receipts, Invoices and Fulfillment POs. Once the export request is made, the user will have access to the Search Exports screen to view their own exports.
Create/Manage My Custom Export Templates	Allows the user to create, copy, edit and delete their own customized template and copy from shared (public) templates.
Share My Custom Export Templates	Allows users to share customized templates that they created.
Administer All Custom Export Templates	Allows users to share and unshare other user's shared templates. This does not allow the user to edit another user's shared templates.
Manage Company Exports	This permission provides access to manage exports across an organization. Users with this permission will be able to see all exports and delete any export if necessary.

Permission	Permission Description
Manage Order Failure Notifications	Users with the **Manage Order Failure Notifications** permission have access to the **PO Distribution Errors** page, which is under the **Administer > Find and Fix Errors menu**. When the system receives a fax failure notification, it will determine if the order was distributed using customized order distribution information, and, if so, it will post an entry in the table. Users with this permission also have the option to enable the **PO Distribution Failure Notice** email in their user profile Notification Preferences.
Manage Business Unit Order Failure Notifications	Users with this permission will have their view of the PO Distribution Errors page defaulted to entries for their Business Unit. Other non-Business Unit entries may be visible (through filtering) depending on whether the User has the Manage Order Failure Notification permission as well.
Search History by Approver	This permission allows end users to search for their orders by specific approvers – in other words by the people that approved/rejected their orders. Users with department access can search by approver and all the orders that the user has approved within that department display. Users with organization-wide history permissions can view all the orders the selected approver has reviewed. When this permission is granted, an additional filter (By Approver) is provided in the document search screens.
Revise Purchase Order Number	This is a high-level permission and should only be granted to a select few individuals at your organization. This permission allows a user to modify the system-generated purchase order number prior to or after the PO is sent to the supplier. An example of when this is done is if your organization's financial system is down and you need to go in and update the number once the "real" number is available.
View Sensitive Credit Card Details	Allows the user to view credit card information within the application. A user with this permission can see the full credit card number, expiration date, and card security code on documents in the application. This permission is OFF by default.

Sourcing Director Permissions

These permissions are located in **Permissions Settings > Orders > Sourcing Director**.

Permission	Permission Description
Create and Manage Sourcing Events	This permission allows users to send items out to bid as well as to view information about sourcing events. Access to Sourcing Director is required for this permission.

Change Request Permissions

These permissions are located in **Permissions Settings > Orders > Change Requests**.

Permission	Permission Description
Send Change Request Comment	Allows users to send a change request comment. This allows the user to communicate change information without actually creating a change request. The comment is entered on the purchase order. If a user has only this permission, that user cannot create a change request.
Create a Change Request for My Orders	Allows users to create change orders only for their own orders.
Create a Change Request for Orders in My Department	Allows users to create change orders for all orders created for their department.
Create a Change Request for Orders within My Department Access	Allows users to create change orders for all orders for which they have Department document search access.
Create a Change Request for Orders in My Business Unit	Allows users to create change orders for all orders created for their business unit.
Create a Change Request for Orders within My Business Unit Access	Allows users to create change orders for all orders for which they have Business Unit document search access.
Create a Change Request for Any Order	Allows users to create change orders for all orders within the organization.
Edit External Communication Settings	Allows users to override the organization's default settings for the External Communication Options fields on individual change requests.
Delete Draft Change Request on My POs	If a PO owner has this permission they can delete change requests created by another user on their own purchase orders.
Delete Draft Change Request that is within my Document Search Access	If an administrator has this permission, they can delete change requests in Draft status on any purchase order they have access to.

Chemical Manager Permissions

Chemical Manager Permissions

These permissions are located in **Permissions Settings > Chemical Manager > Chemical Manager**.

Permission	Permission Description
Create Chemical Item	Provides the ability to create chemical items within the application. Addition of new items is done via the inventory > items screen or the inventory receiving process which is initiated from a completed PO or quantity receipt.
Assign Approver for Chemical Item Record	Controls the display of the assign/approve items tab on the inventory > items screen. Approvers are assigned (or changed) on this tab. Once an approver has been assigned to a chemical item, that user has the ability to review and approve the item information.
Approve Chemical Item Record	Controls the display of the assign/approve items tab on the inventory > items screen. Users that have been assigned as approvers can access this screen and click on their name in the Approver column to access the Item Record screen; "Approved" is an available option in the drop down list.
Quick Create Chemical	When this permission is turned on: - "Approved" is added as an option in the drop down list at the top of the item record screen so the item can be approved right away rather than having to go through a formal approval process. This permission would typically be used by an organization that does not require an approval process for newly created items.
Import Chemical	Controls the display of the "File Import" section on the item create screen. Using this file import feature, item details may be imported from a CSV file as opposed to having to enter the information manually.
Export Chemical	Provides access to an Export button by which items are exported into a CSV file. An Export button (or option) is displayed on the following screens: 1. inventory > items > create new item > item record screen (Export Item Record button in top right corner) 2. Inventory Search Results > (click on chemicals name link) > Export option in drop down list at top of screen 3. inventory > items > assign/approve items > chemicals no. link > Export option in drop down list (if user has permissions to view the assign/approve items tab)
Edit Approved Chemical Item Record	When this permission is turned on: - User is given the ability to edit chemical item records that are in approved status.
Search/View Chemical Items and Containers	When this permission is turned on users are given access to the Inventory Search screen users are able to search for chemical items. From the search results, users can click on the product link to see details of the product. Additionally, if there are any containers available, the user can click on the container icon and see the details for that container. In addition, users are able to view chemical items which they created on the inventory > items > my items screen.

Permission	Permission Description
Search/Order Chemical from Inventory	When this permission is turned on, users are given access to the Inventory Search screen where they are able to search for Chemical items. From the search results, users can click on the product link to see details of the product. Additionally, if there are any containers available, the user can click on the container icon and see the details for that container. This permission also grants the user the ability to order the item from inventory, provided they have access to the proper location for the inventory item(s).
Bulk Import Chemical Records	This permission allows a user to access the inventory setup > data import screen and execute the submission of multiple chemical items via a populated CSV template.
Manage Organizational RAM License	Users with this permission have the ability to set the RAM License limits for the org, manage the RAM Quota of a for Unauthorized Users, Authorized Users and Qualified Users, and determine which Qualified Users are assigned to which Authorized Users.
View Rad Summary action in PR/PO	Users with this permission have the ability to see the Rad Summary option for pending PRs or POs. Users with this permission can also act as RSOs to monitor orders for radioactive products. The RSO can select the appropriate line items and select the Rad Summary action. A pop up window displays information about the RAM license for the org and user, based on the details of the selected line items.

Container Management Permissions

These permissions are located in **Permissions Settings > Chemical Manager > Container Management**.

Permission	Permission Description
Own Inventory	Users that have this permission can be selected as an owner for containers.
Mark For Disposal	With this permission, users have the ability to mark containers for disposal. Typically this permission is given to users who do not have the authority to dispose of containers.
Dispose	Users with this permission have the ability to initiate and execute the disposal of a sample container. This process is initiated either by selecting a sample from search results or entering a barcode. Supporting documents for a disposal job may be attached to the disposal record by browsing, locating, and selecting the document from the internal network, then saving the information in that section.
Reassign	Users with this permission have the ability to initiate and execute the relocation of a sample container.
Correct Amount/Quantity	Users with this permission have the ability to correct the amount or quantity for the selected sample container.
Update	This permission allows users to update information describing the properties of a container.

Permission	Permission Description
History	This permission allows users to access and view, by entering a barcode number, a detailed summary of the operations performed on a specific container over the life of that container.
Create New	This permission allows users to create new sample containers or inventory.
Record Usage	With this permission, users have the ability to note the amount taken from a sample container.
Bulk Import Containers	This permission allows a user to access the inventory mgt > data import screen and execute the submission of a list of containers. The submission process is completed by uploading a populated CSV template.

Miscellaneous Permissions

These permissions are located in **Permissions Settings > Chemical Manager > Miscellaneous**.

Permission	Permission Description
Physical Inventory Details Search	Controls the display of the Inventory Details section on the inventory > inventory search screen for a Supplies item search and the Container Details section on the inventory > inventory search screen for a Chemical item search. These sections provide the ability to further refine the search for specific commodities/containers using additional search criteria: location, owner, and project.
Export Inventory Search Results	Users with this permission may export in CSV (Comma Separated Value spreadsheet) format the results from a search initiated in the application. Results may be exported by selecting the Export button at the upper left hand corner of the search results table, then selecting the CSV format from the "file type" menu.
Attach Files/urls in Materials Mgmt	This permission allows a user to attach a file (such as a document or image file) to a submission record in the Related Information section. This permission is global across all sample types. With this permission, a user will be able to attach documents to records anyplace within the application where this can be done (such as submissions, supporting documentation for disposal and relocation, etc.). A user with this permission will see the fields necessary for naming and browsing directories for appropriate files within their organization's network.

Permission	Permission Description
View Replenishment Report	This permission, in conjunction with one or more of the following permissions, grants access to the inventory > replenishment screen. • Search/View Chemical Items and Containers • Search/Order Chemical Items and Containers • Search/View Supplies Items and Inventory • Search/Order Supplies Items and Inventory The replenishment screen displays a report of inventory items which need to be restocked.
Cycle Counting	Provides access to the inventory > cycle counting screen, where count reports are printed and counts are entered.

Administration Permissions

These permissions are located in **Permissions Settings > Chemical Manager > Administration**.

Permission	Permission Description
Location Configuration	This permission allows users to define, create, and modify a location hierarchy tree under the Locations tab in the Administration section.
Bulk Import Locations	This permission allows a user to access the data import section of the Configuration section and execute the submission of a list of locations within an organization via a populated CSV template.
Container Configuration	This permission allows users to create and maintain container type values, container usage values, and barcode generation rules under the Containers tab in the Administration section.
Printer Configuration	Users with this permission have the ability to configure printers and remote services needed for barcode label printing. This permission also allows users to see view barcode label print jobs submitted by all users (on the Print Queue screen) in addition to their own.
Cycle Counting Administration	This permission gives access to the inventory setup > cycle count configuration screen, where cycle count ranks are created and managed and the system cycle start date is set.
Fulfillment Configuration	Edit and management capabilities for inventory parameters and fulfillment parameters of chemical items are made available with this permission.

Approvals Permissions

There are a number of permissions related to the approval and workflow process for purchase requisitions, purchase orders, and sales orders. These permissions allow approvers to perform a variety of functions ranging from reviewing (approving/rejecting) orders to expediting approvals and restarting workflow.

Requisition Approvals Permissions

These permissions are located in **Permissions Settings > Approvals > Requisition Approvals**.

Permission	Permission Description
Edit specific custom fields in Pending Requisitions (My PR Approvals)	Users with this permission can edit custom fields that are marked as editable in the requisition document configuration.
Edit Pending Requisitions (My PR Approvals)	Provides the ability to edit and update any pending requisitions within the approver's folders.
Approve/Reject Requisitions	Provides the ability to approve or reject requisitions within an approver's folders.
Approve/Reject Requisitions via email	This permission allows the approver to receive an email with the ability to take action when a requisition is pending in a workflow step/folder to which the approver is assigned. The email contains a link for the user to approve, reject, or assign the requisition to themselves. **Note:** The user must also have Approve/Reject Requisitions permission to take action on the requisition.
Forward Requisitions	Allows an approver to forward a requisition to another approver. This permission displays the Forward button on the PR approvals page.
Order Consolidation	Provides the ability to create and submit consolidated carts. Items can only be consolidated from a requisition if the requisition is in pending status within the Order Consolidation workflow folder. This permission is only available with PR workflow.
Put Requisitions On Hold	Allows an approver to put a requisition on hold. A requisition that is on hold will remain in that approver's PR approvals folder. This permission displays the Hold option in the PR approvals Action lists.
Expedite Requisitions	Provides the user with the ability to Expedite a requisition through the PR approval process. A user with this permission can "pull" a requisition through any pending PR workflow steps (that permit expediting).
Revert Requisition Workflow	Users with this permission can return a document to a previous workflow step that a user selects in the Requisition Workflow.

Permission	Permission Description
Assign Substitute Approver for Purchase Requisition Approvals	Provides the user with the ability to assign a substitute for a requisition approvals folder. This permission displays the Substitute link on the PR approvals list page.
Add Ad-Hoc Approver for Purchase Requisitions Approvals	Allows a requisition approver to send the document to a user who is not in the regular approval workflow for a one-time approval. Users with the permission can select, change or delete an ad-hoc approver while they are an approver assigned to a requisition. They cannot modify other fields unless they also have editing permissions. This permission is only visible if the organization has the Ad-Hoc Approver feature enabled.
Perform Requisition Ad-Hoc Approvals	Allows users to accept or reject requisitions only as an ad-hoc approver and at no other time. Users with this permission can subscribe to the PR pending Ad-Hoc Workflow approval notification to alert them that they have been assigned to a purchase requisition as an ad-hoc approver. This permission is only visible if the organization has the Ad-Hoc Approver feature enabled.
Add Products to Consolidated Shopping Cart	Allows the user to add products to a draft order consolidation shopping cart (Order Consolidation is part of requisition workflow only).
Add Lines to Pending Requisitions	Provides the ability to add a new line to any pending requisitions within an approver's personal PR approvals folder. Approvers with this permission will have the Add to Other Cart/PR/PO action on the Search Results page.
Restart/Skip Requisition Workflow Steps in Error	Provides the ability to restart workflow for any pending requisitions within an approver's personal PR approvals folder. This is typically necessary with workflow that triggers or receives integration messages. If an acknowledgment message is not received in the allotted time or after the defined number of retries, the step goes in to error status. This functionality allows and admin to restart the step, i.e., resend the message.
Edit Pending Requisitions (Any Approval Folder)	Provides the ability to edit any pending requisition regardless of whether it is assigned to you or not. The types of pending requisition that can be edited include; unassigned requisitions in a shared folder, requisitions assigned to another approver's personal workflow folder and requisitions in a workflow error state in an automated workflow step.
Approve/Reject Requisitions on behalf of another Approver	Provides the ability to approve or reject requisitions for another user. This is a very powerful permission and should be assigned with caution. This permission allows a user to open requisitions that are assigned to another user and continue them in the process. The "change of hands" is tracked in History. This permission does not allow a user to view another user's folders. You must have the **Manage Other Approver's Requisition Approval folders** permission to perform this task.
Manage Other Approver's Requisition Approval Folders	Provides the ability to access and view another user's Requisition approval folders. With this permission, you can view another approver's workload. To be able to approve or reject the orders that you are reviewing, you must also have the **Approve/Reject Requisition on behalf of another person** permission.

Permission	Permission Description
Expedite requisition through all workflow steps	Use of this permission is highly cautioned. This permission allows a user to bypass all steps in PR workflow, regardless of whether they are assigned as an approver in that step. This step should mainly be used for testing purposes and should only be assigned to a select few individuals at each organization.
Set approvals action default to approve	Use of this permission is highly cautioned. This permission allows the user to click an approve button directly from the requisition's approvals page without first assigning the document.
Show Requisition Workflow in Sidebar	If the Restrict Document Workflow View setting is enabled for an organization, this permission allows a user to view workflow on requisitions.

Purchase Order Approvals Permissions

These permissions are located in **Permissions Settings > Approvals > Purchase Order Approvals**.

Permission	Permission Description
Edit Pending Purchase Orders (My PO Approvals)	Provides the ability to edit and update any pending purchase orders within the approver's folders.
Approve/Reject Purchase Orders	Provides the ability to approve or reject purchase orders within an approver's folders.
Approve/Reject Purchase Orders via Email	This permission allows the approver to receive an email with the ability to take action when a purchase order is pending in a workflow step/folder to which the approver is assigned. The email contains a link for the user to approve, reject, or assign the requisition to themselves. **Note**: the user must also have Approve/Reject Purchase Orders permission to take action on the purchase order.
Forward Purchase Orders	Allows an approver to forward a purchase order to another approver. This permission displays the Forward option in the approvals Action lists.
Put Purchase Orders On Hold	Allows an approver to put a purchase order on hold. A PO that is on hold will remain in that approver's PO approvals folder. This permission displays the Hold option in the PO approvals Action lists.
Expedite Purchase Orders	Provides the user with the ability to Expedite a purchase order through the approval process. A user with this permission can "pull" a PO through any pending steps (that permit expediting).
Revert Purchase Order Workflow	Users with this permission can return a document to a previous workflow step that a user selects in the Purchase Order Workflow.

Permission	Permission Description
Assign Substitute Approver for Purchase Order Approvals	Provides the user with the ability to assign a substitute for a purchase order approvals folder. This permission displays the Substitute link on the PO approvals folder page.
Add Lines to Pending Purchase Orders	Provides the ability to add a new line to any pending purchase order within an approver's personal PO approvals folder. Approvers with this permission will have the Add to Other Cart/PR/PO action on the Search Results page.
Restart/Skip Purchase Orders Workflow Steps in Error	Provides the ability to restart workflow for any pending purchase orders within an approver's personal PO approvals folder. This is typically necessary with workflow that triggers or receives integration messages. If an acknowledgment message is not received in the allotted time or after the defined number of retries, the step goes in to error status. This functionality allows and admin to restart the step, i.e., resend the message.
Edit Pending Purchase Orders (Any Approval Folder)	Provides the ability to edit any pending purchase order regardless of whether it is assigned to you or not. The types of pending purchase orders that can be edited are unassigned purchase orders in a shared folder, POs assigned to another approver's personal workflow folder and POs in a workflow error state in an automated workflow step.
Approve/Reject PO on behalf of another Approver	Provides the ability to approve or reject requisitions for another user. This is a very powerful permission and should be assigned with caution. This permission allows a user to open requisitions that are assigned to another user and continue them in the process. The "change of hands" is tracked in History. This permission does not allow a user to view another user's folders. You must have the **Manage Other Approver's PO Approval folders** permission to perform this task.
Manage Other Approver's Purchase Order Approval Folders	Provides the ability to access and view another user's PO approval folders. With this permission, you can view another approver's workload. To be able to approve or reject the orders that you are reviewing, you must also have the **Approve/Reject PO on behalf of another person** permission.
Expedite Purchase Orders Through All Workflow Steps	Use of this permission is highly cautioned. This permission allows a user to bypass all steps in PO workflow, regardless of whether they are assigned as an approver in that step. This step should mainly be used for testing purposes and should only be assigned to a select few individuals at each organization.
Set approvals action column default to approve	Use of this permission is highly cautioned. This permission allows the user to click an approve button directly from the purchase order approvals page without first assigning the document.
Show PO Workflow in Sidebar	If the Restrict Document Workflow View setting is enabled for an organization, this permission allows a user to view workflow on purchase orders.

Request Approvals Permissions

These permissions are located in **Permissions Settings > Approvals > Form Request Approvals**.

Permission	Permission Description
Approve/Reject Form Requests	Provides the ability to approve or reject requests in a user's own or assigned approval folders.
Forward Form Requests to Another Approver	Allows an approver to forward a request to another approver. This permission displays the **Forward** option in the approval's Action list.
Manage Other Approver's Form Request Approval Folders	Provides the capability for a user to view and manage another approver's personal and shared form request workflow folders. With this permission set ON, the user will be able to search and select approvers within their department permissions for management. This permission allows the user to perform workflow management actions for requests assigned to the designated approvers, including Assign/Remove substitute approver; Assign the form request to the user's personal folder; Return form requests to shared workflow folders; Assign form requests from shared workflow folders to personal folder; Forward form requests to another approver; Place form requests on hold. Any action performed on a form request will have an audit record created stating the user performing the action on behalf of the approver.
Assign Substitute For Form Request Approvals	Provides the user with the ability to assign a substitute for a form request approval folder. The user also needs to have the approve permission.
Approve/Reject Form Requests on Behalf of Another Approver	Provides the ability for a user to approve or reject a request currently assigned to another approver's personal workflow folder. The approval actions are recorded for the user on behalf of the managed approver.
Put Form Requests on Hold	Allows an approver to put a request on hold. A request in this status will remain in that approver's folder. . This permission displays the Hold option in the form request approvals Action lists.
Restart/Skip Form Request Workflow Steps in Error	Provides the ability to restart workflow for any pending request within an approver's personal approvals folder. This is typically necessary with workflow that triggers or receives integration messages. If an acknowledgment message is not received in the allotted time or after the defined number of retries, the step goes into an error status. This functionality allows the user to restart the step, i.e. resend the message.

Permission	Permission Description
Expedite Form Requests Approval Workflow Through All Steps	Provides the ability for the approver to expedite to a request workflow step, including the End step (completes workflow). The user will also be able to expedite past any workflow steps configured as "do not allow bypass". All steps skipped as part of the expedite will be recorded as part of the request audit trail.
Revert Form Request Workflow	Users with this permission can return a document to a previous workflow step that a user selects in the Form Request Workflow. **Important!** This permission will allow a user to revert ANY form request workflow regardless of the type (i.e., Supplier Requests, Contract Requests, Generic Requests, Check Requests, etc.).
Expedite Form Requests Approval Workflow	Provides the ability to expedite a request through any pending workflow steps that permit expediting.
Set Approvals Action Column Default to Approve	Site administrators are advised to enable this permission with extreme caution. If an organization's approval process should involve opening a supplier request to examine it for correct data before approving, then users should not be given this permission. Only users with the Administration and Edit All User Profiles/Roles/Permissions permissions are allowed to enable or disable this permission. This permission allows the user to click an Approve button directly from the approvals page without first assigning the request. An approver can approve a request quickly without having to make a careful examination of the information. The action column on the Approvals page normally shows an Assign button. With this permission enabled, the Action column will show an Approve button by default.
Return to Requester	Allows the user to return the request to the requester.
Edit Pending Requests (My Form Request Approvals)	Provides the ability to edit and update any pending requests within the approver's folders.
Edit Pending Requests (All Form Request Approvals)	Provides the ability to edit and update any pending requests within any approval folder.
Add Ad-Hoc Approver for Request approval	Allows a request approver to send the document to a user who is not in the regular approval workflow for a one-time approval. Users with the permission can select, change, or delete an ad-hoc approver while they are an approver assigned to a request. They cannot modify other fields unless they also have editing permissions. This permission is only visible if the organization has the Form Request Ad-Hoc Approver feature enabled.
Perform Ad-Hoc Approve/Reject/ Return Request	Allows users to accept or reject requests only as an ad-hoc approver and at no other time. Users with this permission can subscribe to the Form Request Pending Ad-Hoc Workflow Approval notification to alert them that they have been assigned to a request as an ad-hoc approver. This permission is only visible if the organization has the Form Request Ad-Hoc Approver feature enabled.

In addition, the following permissions related to approvals are located in the user profile at **Permission Settings > Shopping, Carts & Requisitions**, under the **Cart/Requisition** heading.

- Add Ad-hoc approver to draft Cart
- Edit PO Number
- Manually Override Pricing

The following permissions are located in the user profile at **Permission Settings > Orders**, under the **My Orders/Organization Orders** heading.

- View Organization Orders
- Edit Organization Orders
- Revise PO
- Export Search Results
- Search History by Approver
- Revise Purchase Order Number

The following permissions are located in the user profile at **Permission Settings > Orders**, under the **Sales Order Fulfillment** heading (if your organization uses sales orders).

- Forward Sales Orders
- Fulfill Sales Orders
- Assign Substitute Approver for Sales Order Approvals
- Edit Any Pending Sales Orders
- Approve/Reject Sales Orders on behalf of another Approver
- Manage Other Approver's Sales Order Approval Folders

Notifications

You may choose to enable notifications for certain eProcurement activities taking place in your organization through the application.

Notification preferences can be set at the role or user level. You can choose to receive an email, an in-application notification, both, or none. See **Notification Preferences** in the **Site Essentials Handbook** or online searchable help and **Creating and Managing Roles** in the **Administration and Configuration Handbook** or online searchable help for additional information.

eProcurement notifications are found in the following **Notification Preferences** sections:

- **Shopping, Carts & Requisitions** - Contains notifications related to shopping cart and requisition activities (cart assigned, requisition submitted into workflow, cart rejected or returned, etc.)

- **Change Requests** - Contains notifications related to change request activities (change request assigned, change request accepted, change request rejected, etc.)
- **Purchase Orders** - Contains notifications related to purchase order activities (PO submitted into workflow, PO sent to supplier, PO rejected, etc.)
- **Contracts** - Contains notifications related specifically to contract activities (start date notices, end date notices, contract workflow, contract obligations, etc.)
- **Catalog Management** - Contains notifications related to catalog management (PunchOut status changed, submission import error, price file approved or rejected, etc.)
- **Form Request** - Contains notifications related to form request workflow (form request approved, form request rejected, etc.)
- **Administration and Integration** - Contains notifications related to administration and integration (workflow step errors, import/export, etc.)

For a description of a notification, click the ❓ associated with the notification, as shown below.

Form Request Review Workflow

Form Request Pending Approval in Workflow   None

This notifies approvers that a form request has stopped in their workflow folder and needs approval.
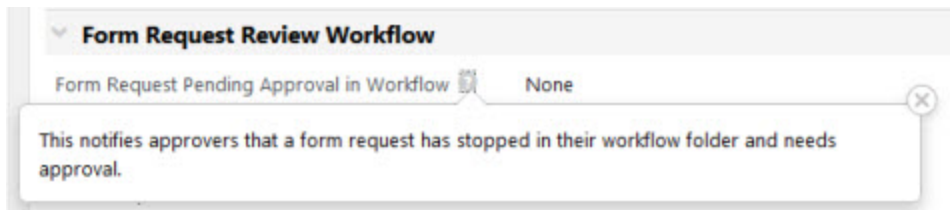
Guide to Shopping Pages

Introduction

Here is an overview of the shopping pages that you may see in eProcurement. What users see may vary based on organization settings.

Search

The **Shopping Home** page displays a search field and purchasing showcases that have been configured by your organization.
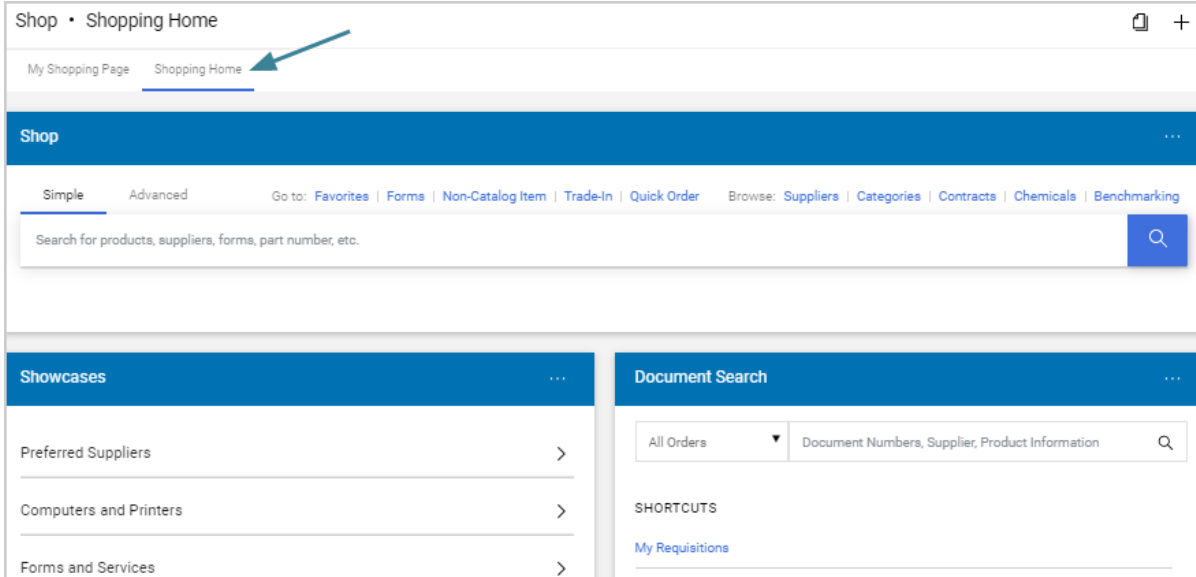
In the **search field**, users enter key words for the items they want to purchase, then click the search icon. Users can search for hosted and non-catalog items, forms, requests, and level II punchout items.

Simple and **Advanced** tabs along the top of the search field allows users to toggle between simple and advanced search pages.

The **Go to** and **Browse** shortcut links provide quick access frequently used features such as favorites or forms. The links are displayed as text above the field on a wide screen, and collapse into an actions icon ••• with a drop down menu on narrower screens.
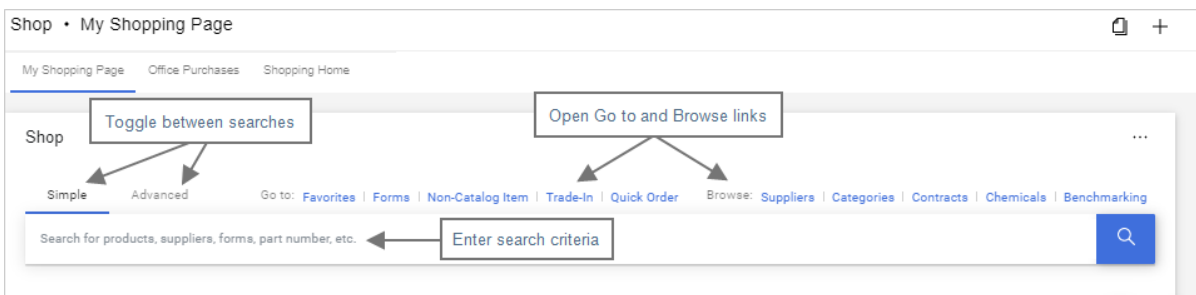
Recommended Search Items

The product search field offers up to 10 recommended items based on a user's personal and shared favorites, and items that have been added to requisitions in the last 30 days. If there are no recommended items, or you don't want to use one of the recommended items, click the Search icon to generate a search.

In the recommended item list:

- Clicking on a product name will launch a search for the item and take users to the search results.

- A ♥ icon indicates that an item is in the logged user's personal favorites folder. A ⮜ icon indicates that an item is in a shared favorites folder. A 🛒 icon indicates that an item has been added to a requisition in the last 30 days.

- An **Add To Cart** button allows users to add an item or request directly to their cart. An **Add and checkout** option on the drop-down menu will take users directly to the Checkout/Requisition page where they can purchase their items without going through the search results.
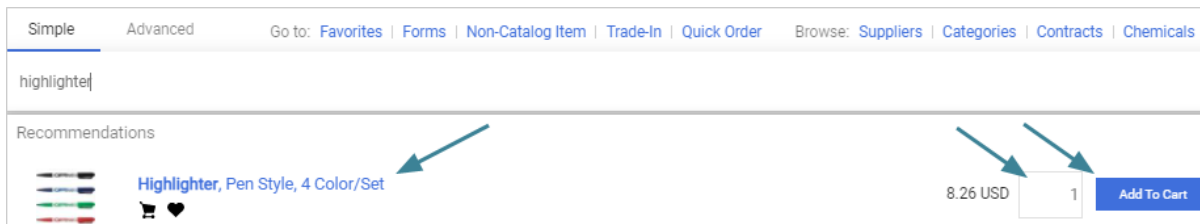
Search Results

Items that match the search criteria are displayed on the search results page. On this page users can:

- Search for additional items using the search field at the top of the page.
- Apply multiple search filters in the left sidebar to narrow search results.
- Choose different sorting preferences from the BEST MATCH menu.
- Click on an item to display product details.
- Compare products.
- Add items to their Favorites.
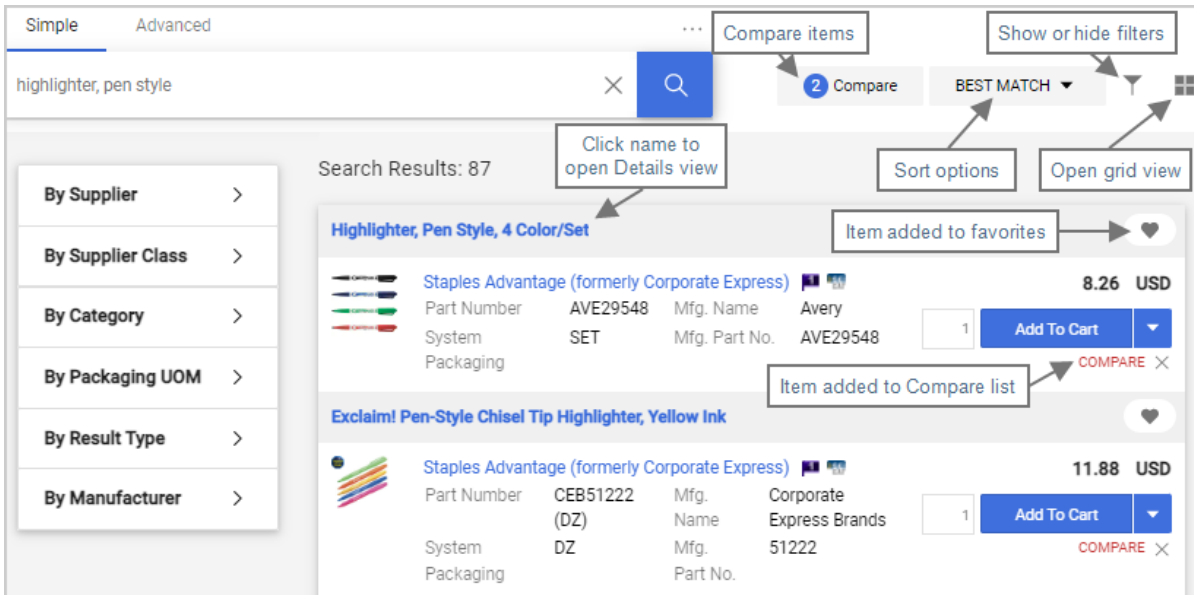
List and Grid Views

In the search results page, you can switch between the **list** ☰ view as shown above, or you can click the **grid** ⊞ icon to view items as tiles in a "sticker" format. The grid view displays 1-6 columns of tiles, depending on the size of the screen. You can click the ⚙ icon to choose which product details are displayed on the tiles.
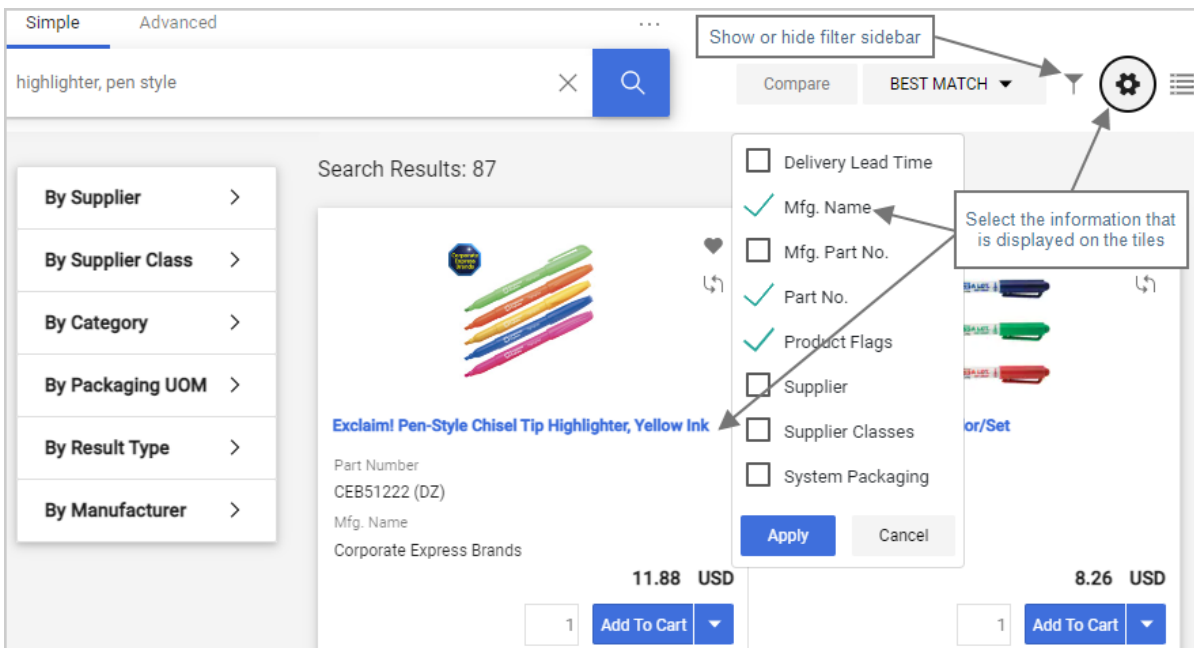
Details View

Clicking on an item name in the Search Results, Cart or Checkout pages opens a **Details** view, which provides detailed product information. Information panels in the view can be expanded or collapsed. You can also change the number of items you want to order and add it to your cart from this view.

Cart

The shopping cart contains items a user has selected to purchase. Users can add or remove items, change commodity codes, indicate whether the item is taxable or is a capital expense, adjust quantities and view an estimated total purchase amount.
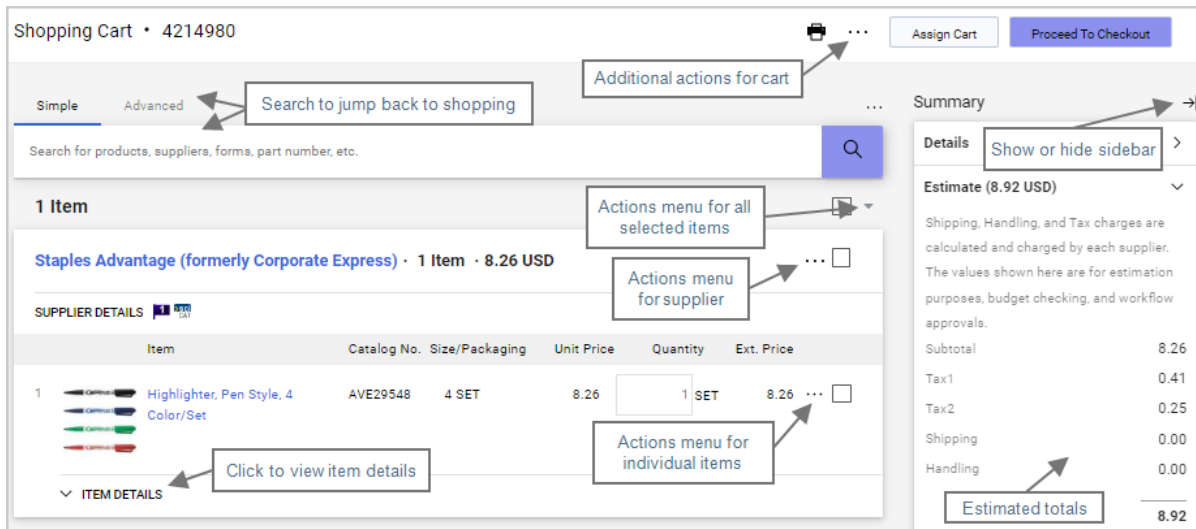
Checkout

When a user clicks **Proceed To Checkout**, their order becomes a draft requisition and they are directed to the **Requisition** document placed Draft status. Additional options and information about the order are displayed.

Document Actions

Document **actions** are available in the top right corner of the page:

- Click one of the **action buttons** to go to the next step. These are primary actions such as Proceed to Checkout, Order, Reject, Approve, Save, Complete, Lock, Unlock, Assign. Primary actions are always on the right.

- Click the **additional actions** icon (***) to select additional actions that are available for the document from a drop-down menu. For example, clicking the icon displays Continue Shopping or Add Comment actions.

Show or Hide Items on the Page

These icons in the top right corner of the page control how the page looks and provide the ability to print the document:

- →| |← Show or hide the sidebar on documents

- 👁 Click to apply viewing filters. Select an option from the Filter View drop-down menu to view individual sections on the page. For example, view header details only, view line items only, or view billing details only. The icon is blue if a filter is applied.

- 🖨 Print the document.

Tabs

Tabs along the top of the page contain additional information about the document, such as Comments or Attachments. Click the tabs to view and edit information within them.

On the **Summary** tab, general information about the requisition is displayed in sections near the top of the left panel (i.e., the document header), and the items ordered are displayed in the **Items** section in the bottom section of the left panel:

- Click the edit ✏ icon to modify information in a section.

- On the **Summary** tab, in the **Items** section, the actions menu for **selected** items is the drop-down menu icon at the top right corner of the section. On individual items, click the action icon • • • to see actions that can be applied to that item only.
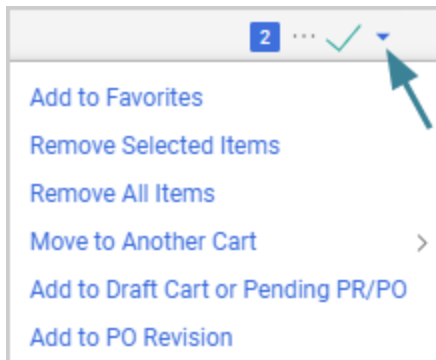
- The **right sidebar** shows document totals, related documents and workflow, if applicable. The document status and any messages are displayed near the top of the section. Users can view approval workflow information in the **What's next for my order?** section.

Requisition · 4215000

Page view filter options, print, help ➡

Check Budget | Assign Cart | Place Order

Summary | Taxes/S&H | PO Preview | Comments | Attachments | History

Additional requisition actions

Click tabs to add or view information

General ✏ ···

Cart Name   2023-06-11 bwilson 02

Description   no value

Prepared by   Brynn Wilson

Prepared for   Brynn Wilson

PO Clauses   3 ⓘ   Edit | View details

Ad-Hoc   Select
Approver

Tax Code   USA
US Based

Budget Date   no value

Shipping ✏ ···

Ship To

Attn: Brynn Wilson
Department
3020 Carrington Mill Blvd
Suite 100
Morrisville, NC 27560
United States

Delivery Options

Expedite   ✕

Ship Via   Best Carrier-Best Way

Billing ✏ ··· ⌄

Bill To

Contact Line 1 Brynn Wilson
6501 Weston Parkway
Cary, NC 27513
United States

Credit Card Info

No credit card has been assigned.

Billing Options

Accounting   no value
Date

Summary ➡

| Draft |

Total (17.85 USD)   ⌄

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal   16.52
Tax1   0.83
Tax2   0.50
Shipping   0.00
Handling   0.00

17.85

Click any edit icon to change information

Accounting Codes   ✏ ··· >

Internal Notes and Attachments ✏ ···   **External Notes and Attachme...** ✏ ···   **Additional Notes**   ✏ ··· >

2 Items
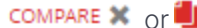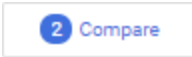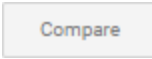
Actions menu for all selected items   ··· ☐ ▾

Staples Advantage (formerly Corporate Express) · 2 Items · 16.52 USD   ··· ☐

⌄ SUPPLIER DETAILS

	Item	Catalog No.	Size/Packaging	Unit Price	Quantity		Ext. Price		
1	Highlighter, Pen Style, 4 Color/Set	AVE29548	4 SET	8.26	2	SET	16.52	···	☐

⌄ ITEM DETAILS   ✏

What's next for my order?   ⌄

Next Step   Order Consolidation

Approvers   Admin, Wallace

View skipped steps, view workflow, print workflow

Workflow   ···

◯ Show skipped steps

📍 **Draft**
Active
Brynn Wilson

Actions menu for item

Submitted Requisitions

Submitted **Requisitions** are displayed in a document configuration that is similar to the Checkout page.

Icons

You will see these icons in the shopping pages:

- ⋯ Click to display actions for items in a document, panel or page

- ✏ Click to edit information

- ⌃ Collapse section

- ⌄ or ❯ Expand section

- ♡ Click to add an item to Favorites

- 💙 Item is a user's personal Favorite

- 🔗 Item is a shared Favorite

- 👥 Shared cart

- 🛒 The recommended item has been added to a requisition in the last 30 days

- COMPARE or 🗐 Click to add an item to the Compare list

- COMPARE ✖ or ▮ Item has been added to the Compare list

- [2 Compare] Click to generate a comparison

- [Compare] No items have been selected for comparison

- ▦ Show shopping search results in a grid view

- ☰ Show shopping search results in a list view

- ⚙ Choose which item details to display on tiles in the grid view

- 🚩 Item requires sourcing

- 🏅 Item is associated with a contract

- [🔻Show] [🔻Hide] Show or hide the filters on carts

- →| |← Show or hide sidebars on documents

- 👁 Click to apply viewing filters. For example, select an item from the drop-down to view general information only or view line items only. The icon is blue if a filter is applied.

- 🖨 Print document or workflow information

- ⁇ Click to view help information

Product Search

Shopping from the Main Menu

There are many ways to search for products in JAGGAER ONE. The **Shop** icon ⬚ on the main menu is where to start shopping. The menu offers quick access to several shopping destinations:

- **Product Quick Search** at the top of the menu allows you to quickly search for an item. Select from the drop-down menu at the top of the Shopping section to search by **Keyword**, **Catalog Number** or **Cas Number**. Enter a **search term** and then click the search icon.

- The **Shopping Home** page is a key destination that provides access to most shopping tasks in the system. Many of the shopping options that are accessed from the main menu are also available on the Shopping Home page. For many organizations who shop via the JAGGAER ONE site, the Shopping Home page is the primary home page and the first page to display when a user logs in to the application.

- **Go To** and **Browse By** options provide direct access to other search areas.
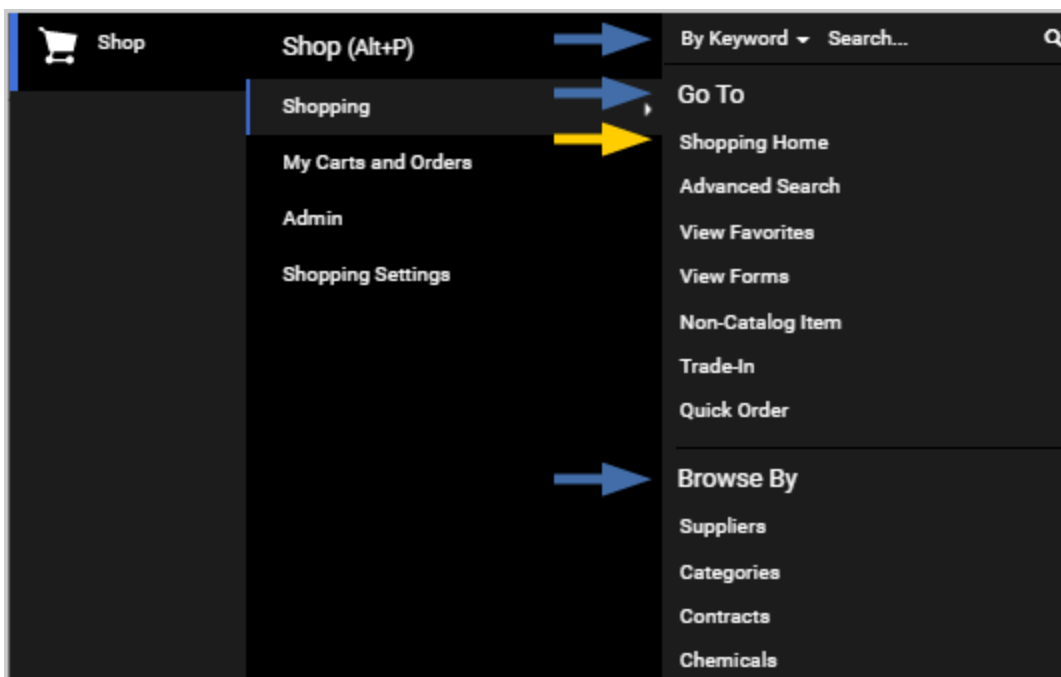
Related Permissions

See for information on eProcurement permissions.

Using Quick Product Search

The quick product search option on the main menu allows you to perform a search by keyword, catalog number or CAS number. Quick search is useful when a shopper would like to search for one of those specific values across all verticals.

1. Navigate to **Shop** 🖳 **> Shopping**. The flyout screen contains the quick search fields as shown below:
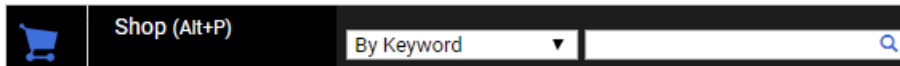
2. Select a value from the drop-down options in the first field: **By Keyword**, **By Catalog Number** or **By Cas Number**.

3. Enter the search term in the text box.

4. Click the search icon to execute the search. The search results display.

5. Click the **Go To** and **Browse By** options to open other search areas.

Shopping Home Page

Overview

The Shopping Home screen is a configurable page. The image below shows an example of the information that is usually included on the Shopping Home page by default, but your screen may contain additional (or fewer) capabilities. For information about your specific Shopping Home page, please contact your system administrator.
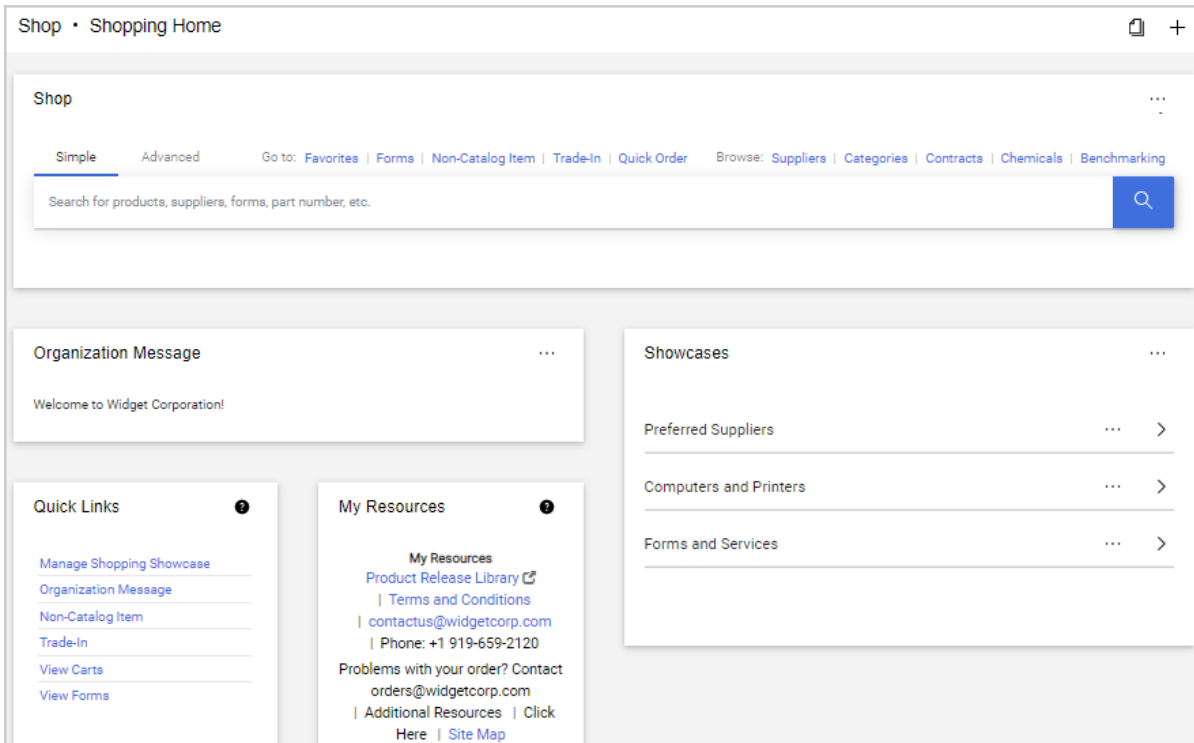
- **Shop** - From this area, you can perform a Simple or Advanced product search. Clicking on Advanced Search also gives you access to shortcut and browsing options to locate items for purchase via forms, favorites, suppliers and more. For additional information about choosing items for purchase, please see Product Search Tips.

- **Organization Message** - This is the organization message area. A system administrator may change this regularly to convey important information.

- **Quick Links** - This area displays important links as configured by the system administrator.

- **My Resources** - This area displays important contact information for your organization.

- **Showcases** - This area displays the purchasing showcases to which you have access. For additional information about shopping from a showcase, please see Showcases .

Note to Administrators: The Shopping Home page is customizable by administrators who have the appropriate permissions. For information about configuring dashboards, please see "Personal Dashboards and Widgets" in the **Site Essentials Handbook** or online searchable help.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Shop at the Top

On the **Shopping Home** page, and in many other areas of the application, the **Shop** widget provides options for Simple and Advanced searches as well as Go To and Browse options. The links are displayed as text above the field on a wide screen, and collapse into an actions icon ▪▪▪ with a drop down menu on narrower screens.
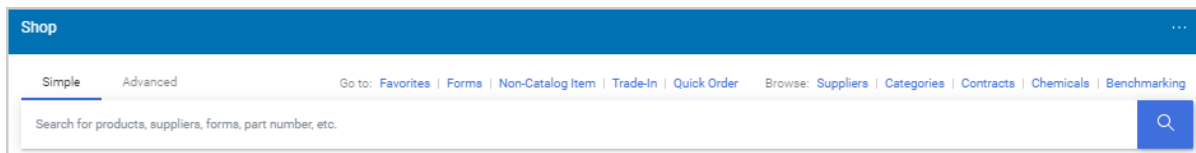
- **Simple Search** - To initiate a search, enter search terms in Search field and press Enter or click the search icon. See "Simple Search" on page 68

- **Advanced Search** - Click the **Advanced** tab to display additional fields that allow you to enter specific criteria to include or exclude from the search results. See "Advanced Search" on page 70

- **Go To** - These links allow you to shop from favorites, to access forms, enter non-catalog items and use quick order options for known catalog numbers. See "Product Search - Go To Options" on page 78.

- **Browse** - These links allow you to shop by supplier category, contract, or use the chemical structure search. See "Product Search - Browse Options" on page 82

Recommended Items

The product search field offers up to 10 recommended items based on a user's personal and shared favorites, and items that have been added to requisitions in the last 30 days. If there are no recommended items, or you don't want to use one of the recommended items, click the Search icon to generate a search.

In the recommended item list:

- Clicking on a product name will launch a search for the item and take users to the search results.

- A ♥ icon indicates that an item is in the logged in the user's personal favorites. A ⩩ icon indicates that an item is in a shared favorites folder. A 🛒 icon indicates that an item has been added to a requisition in the last 30 days.

- An **Add To Cart** button allows users to add an item or request directly to their cart. An **ADD AND CHECKOUT** option on the drop-down menu will take users directly to the Checkout/Requisition page where they can purchase their items without going through the search results.

Showcases

On the **Shopping Home** page, organizations can choose to highlight specific suppliers, forms, requests, favorites and more in one or more purchasing showcases. Clicking on a sticker in the showcase opens an overlay that displays options for selecting items to purchase.
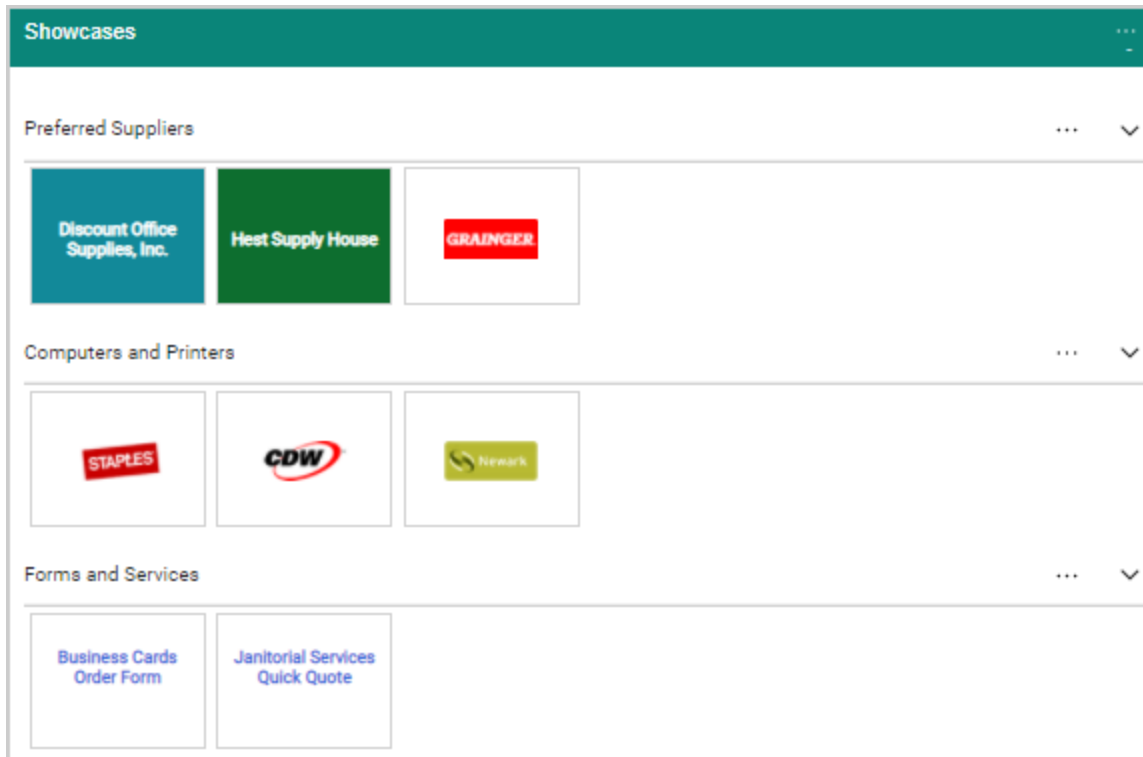
Product Search with Punch-Out Suppliers

Punch-out catalogs are integrated external links to a supplier's web-based catalog. The user exits the application to search and select products from a supplier's web catalog, then returns the items to the JAGGAER shopping cart. The selected items are then submitted through the standard requisition/order process.

When accessing a punch-out supplier, a user is automatically authenticated to the supplier, so the supplier's website knows which organization the user is from to show the appropriate products and pricing.

IMPORTANT: The interface and usability of punch-out shopping varies between suppliers. The step-by-step instructions of how to shop on each supplier's website is not provided in the task below.

1. Navigate to **Shop** **> Shopping > Shopping Home**.

2. If you know which supplier you would like to "visit" and want to go directly to the supplier's site, locate the supplier in the Purchasing Showcase. Some punchout suppliers will also be available in the product search. To perform a keyword search, enter the search term in the simple or advanced search then click **Go**.

3. Once the punch out is selected, the browser is redirected to the supplier's website. The supplier's website is framed within the JAGGAER browser window.

4. To cancel the punch out, select the **Cancel Punchout** button at the top of the screen.

5. Once in the punch out site, use the appropriate search tools to find the desired products. Once all products are found, check out of the punch out site. The products in the punch out shopping cart are returned to the JAGGAER shopping cart. **Important Note:** An order is NOT being placed with the supplier when checking out of their punch-out site. The purchasing process continues once returned to the JAGGAER application.

6. Additional products can be added to the JAGGAER shopping cart from other punch out vendors as well as hosted catalog vendors.

Punch Out and Hosted Catalogs

A catalog is a supplier's product offering. There are two types of catalog: hosted and punch-out. These are described below.

- **Hosted Catalog** - In simplest terms, a hosted catalog is an online version of a supplier's printed catalog. Hosted catalogs contain product data and details, along with pricing information for each item. When a product search is performed, the products in all of the hosted catalogs are searched. Hosted catalog search results contain product information from all suppliers depending on the search criteria entered by the user.

- **Punch-out Catalogs** - Punch-out catalogs are integrated external links to a supplier's web-based catalog. The user exits the application to search and select products from a supplier's web catalog, then returns the items to the JAGGAER shopping cart. The selected items are then submitted through the standard requisition/order process.

External Marketplace Results

If an organization has enabled **Amazon Integrated Search**, users with punch-out access to an Amazon Business Marketplace supplier can shop for products in the Amazon Marketplace from JAGGAER.

Users shop for an item as usual, i.e., by entering a search term in the Shopping widget. In the search results, an **External Marketplace Results** tab shows items from the Amazon Marketplace that match the search criteria. The number of results (up to 306) is displayed in the tab heading. Items from all other suppliers are shown on the **Search Results** tab.

In the External Marketplace Results tab, users can select an item by clicking the ⬀ **Order From Supplier** link. They will be directed to the item in Amazon, where they can add the item to their cart. Once the item is placed into the cart in Amazon, the user will be returned to JAGGAER to complete the ordering process.

Simple Search

Overview

The **Shop** widget includes a basic, or **simple search** option that provides a "Google-like" experience. Users can enter search terms in the search field to find items and add them to their cart. All of the words entered in the keyword text box must be found in the items displaying in the product search results.

When a simple search is performed, to find the most relevant search results, the system searches for many different things, including:

- **Keywords** - Keywords are entered by system administrators to help guide users to the correct contract, form or request, supplier, or favorite items.

- **Item Information** - Information included by the supplier for an item such as product description, product category, catalog number, etc.

Related Permissions

See for information on eProcurement permissions.

Using Simple Search

1. Access the **Shopping Home** page or dashboard and locate the **Shop** widget:

   - Go to **Shop** **> Shopping > Shopping Home**. On the default **Shopping Home** page, simple search displays by default at the top of the page. Often the Shopping Home page is your default home page.

     OR

   - In some cases the default Shopping Home page is replaced by one or more shopping dashboards. To access product search from a dashboard, open the appropriate dashboard and locate the **Shop** widget.

Recommended Items

The product search field offers up to 10 recommended items based on a user's personal and shared favorites, and items that have been added to requisitions in the last 30 days. If there are no recommended items, or you don't want to use one of the recommended items, click the Search icon to generate a search.

In the recommended item list:

- Clicking on a product name will launch a search for the item and take users to the search results.

- A ♥ icon indicates that an item is in the logged in the user's personal favorites. A ⟨ icon indicates that an item is in a shared favorites folder. A 🛒 icon indicates that an item has been added to a requisition in the last 30 days.

- An **Add To Cart** button allows users to add an item or request directly to their cart. An **ADD AND CHECKOUT** option on the drop-down menu will take users directly to the Checkout/Requisition page where they can purchase their items without going through the search results.


Advanced Search

Overview

Advanced search allows users to search on specific criteria to generate more focused search results than with simple search. The various search fields can be used to filter search results to include only products that meet that search criteria. Keyword searching can be performed within any product vertical where hosted catalogs are available.

The first step to performing an advanced search is to select a category (or "product vertical") in the **Advanced Search** field at the top of the page to narrow your search. Additional search fields vary depending on the selected the product vertical. For example, all verticals can be searched by supplier. However, a shopper can only search by CAS# (an identifier to specific chemicals) when the Lab Supplies vertical is selected.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Using Advanced Search

1. Open the **Advanced Search** page in one of the following ways:

    - *From the main menu* - Navigate to **Shop** 🖥 **> Shopping**. The Shopping slide-out menu displays. In the **Go To** section, click **Advanced Search**.

    - *From the Shopping Home page or another dashboard* - Navigate to **Shop** 🖥 **> Shopping > Shopping Home** or open the appropriate dashboard.

        - Locate the **Shop** widget. If the widget is defaulted to simple search, click the **Advanced** tab.

        - Advanced Search links may also be available in the **Quick Link** widget on a dashboard.

    The Advanced Search page opens, displaying search fields that can be used to filter your search results.

2. In the **Advanced Search** vertical selection field at the top of the page, determine if your search will focus on a specific vertical or be across all verticals. For a description of each category available in the system, please see the **Product Verticals** section below:

   - Leave the field set to **Everything** (default setting) to search across all verticals.
   - **Select an option** from the drop-down menu to focus on a specific vertical.

3. Enter the search criteria in the remaining fields as necessary. The additional search fields and options that are displayed will vary depending on the selected vertical. At least one search value must be entered to limit your search. For a description of each advanced search option, please see the **Advanced Product Search Criteria Options** section below.

4. After defining your criteria, click the **Search** button. The search results display.

Advanced Product Search Criteria Options

Proper usage of the search criteria fields makes a significant difference in terms of the quality of search results. Users should take the time to understand how each of these fields work.

The table below provides information the advanced search options in this section. The options displayed in the actual search depend on the selected product vertical.

Find results that have:

Search Field	Description and Examples	Vertical(s)
All of These Words	Search results will include only products that contain ALL words of the words entered in the search field.	All
Supplier	Enter the beginning of a supplier's entire name to find products from all suppliers that include the terms as part of their name, or begin typing and select from the drop-down list of suppliers to see products from a single specific supplier. When the Supplier Name field is used as part of the search criteria, only the supplier name is searched.	All

Search Field	Description and Examples	Vertical(s)
Part Number (SKU)	Enter the catalog number or SKU (Stock Keeping Unit) for the required product(s). This may be the distributor's SKU or the manufacturer SKU. For best results the entire SKU should be entered. A partial match on part number returns the closes matching or similar results. This is a "begins with" match and at least four characters must be entered. If multiple strings of text are entered (i.e. "123 456 789" then all components of that string must be present in the part number for the item to be returned. For example. if "123 456 789" is entered into Product Search, the part numbers "123-456-789" and "123-456-789-000" would be returned and "123-456" would not. When the Part Number field is used as part of the search criteria, only those fields related to the Part Number for items are searched. This includes Supplier Part Number, Manufacturer Part Number, Alternate Part Number, Client Catalog Number, and Custom Catalog Number.	All
Manufacturer Name	To find products from a specific manufacturer, enter the name of that manufacturer here. Search Results will include products from all suppliers who have identified the manufacturer in the product information provided to JAGGAER. Enter multiple manufacturer names to limit results to a set of certain manufacturers. Only the manufacturer field is searched for matches.	All
Commodity Code	Click the search icon next to the field to search for and select one or more commodity codes. Users can search by code and/or code description. If your organization uses a commodity code tree structure, click the search icon next to the **Commodity Code** search field to display the tree structure, then navigate through the tree structure and click the checkbox next to a commodity code to select it, or type a commodity code or description in the search field to find matches in the tree structure	All
CAS No.	This search field is available in the Laboratory Supplies category only. CAS numbers can be entered in any format using numbers, brackets, braces, parentheses and dashes. (Any other characters are stripped.) The search engine will convert the entered value to the appropriate format to return only products with the entered CAS number. Enter multiple CAS numbers to find all chemicals with matching CAS numbers. **Note:** The entered CAS No. is validated to reduce errors.	Lab Supplies

Search Field	Description and Examples	Vertical(s)
Product Class	This search field provides a more detailed level of categorical search.	Lab Supplies
Product Size	Enter the units for the product size and select the dimension of the units from the pull-down menu. For example, enter 500 for units and select mL from the pull-down for product size = 500mL.	Lab Supplies

Other Options

The table below provides information about search options in this section. The search options are available for all verticals.

Search Field	Description and Examples
Exact Phrase	Products containing the **exact words** in the order entered are returned. This is a very powerful search strategy if you know the precise way in which a supplier presents its information. If you are unsure – and looking for results from multiple suppliers – it is recommended to use the **All of These Words** option instead. For example, Large Gloves will find products with **Large Gloves** in the product description but will not find **Gloves, Large**. For a full list of fields that are considered when this field is used, refer to **#1:- Simple Search**.
Exclude Words	Products including **any of the words** entered in this field are **excluded** from Search Results. Another search field must be used when using the exclude function. For example, you may be looking for all glove options that are not small or medium. You could enter **latex gloves** in the **must include the words** field and **small medium** in the **exclude the words** field. For a full list of fields that are considered when this field is used, refer to **#1:- Simple Search**.
Any of These Words	Search results will include products containing **any of the words** entered in this field. Products containing more than one word appear higher in search results than products with only one. Keep in mind, the search results will not be as targeted as using the **must include the words** field.

Custom Catalog Attributes

In addition to the fields listed above, organizations can set up specific attributes that users can search against. These are called **custom catalog attributes** (CCA) and allow shoppers to search for specific types of items – such as discounted items, items that are on sale, or search by internal IDs. Available custom catalog attributes display beneath the top two sections of the advanced search screen. To include a CCA in the search, simply click the appropriate checkbox or enter search criteria in the fields.

Product Verticals

Product Vertical	Description and Examples
Lab Supplies	This category includes products used in various research environments. Examples include items such as these and more: • reagents (used in synthesis/analysis, cell/molecular biology etc.) • glassware • analytical equipment, meters, and supplies • safety and cleaning supplies
Office/Computer	This category includes office supplies and consumables such as: • files and folders • desk supplies • packing and shipping supplies • paper and printing supplies • writing instruments • blank media
MRO/Facilities	This category includes products related to maintenance repair and operations (i.e., facility management). Examples include: • electrical, lighting, and air conditioning supplies • plumbing supplies • tools • hardware • lubrication • janitorial/ground maintenance supplies

Product Vertical	Description and Examples
Furniture	This vertical includes all furniture products such as: • Desks and tables • Workstations • Cabinets • Chairs • Shelving • Office furnishings such as lamps, etc.
Services	This vertical includes all service-related requests (i.e., instead of product/item requests, these are service requests). Service examples include: • Lab services • Office and project management services • Legal services • Training services • Catering services • Manufacturing services
Manufacturing/Engineering	This category typically includes major equipment purchases such: • Construction equipment • HVAC equipment • Water treatment equipment • Pharmaceutical equipment
Books and Publications	This category includes hard copy documentation spanning all topics and interests. Items in this category include: • Books • Manuals • Reference Publications • Magazines

Product Vertical	Description and Examples
Electronics/IT/AV	This category includes all electronic or computer-related equipment including: • computer hardware/software • computer accessories • printers/copiers/scanners • communication equipment/accessories • AV equipment/accessories • networking equipment/accessories
Specialty	This category includes miscellaneous products such as: • Sporting equipment and supplies • Clothing materials • Hobby and entertainment related items • Teaching and classroom aids • Musical instruments • Toys and games
Food/Food Equipment	This category includes all food-related items such as: • Commercial food preparation, storage, and serving equipment • Food consumables and supplies • Food items (meats, vegetables, juices, beverages, snacks, etc.) • kitchen equipment and utensils
Medical / Clinical Supplies	This category includes medical, surgical, clinical, and dental products such as: • gauze, needles • dental equipment • hospital equipment **Note:** The items in this vertical were previously in the Lab Supplies vertical.

Using Antibody Resource

Antibody Resource is a tool geared specifically to biologists or researchers who use antibodies in their research. This search tool is a parametric search that allows users to filter products based on antibody specific attributes, e.g., Clone, Species Reactivity, Conjugate, etc.

Search results are presented in a different format from the normal product search. Additional columns are included to help the researcher make informed decisions.

1. Navigate to **Shop** ▣ **> Shopping > Shopping Home** or open the appropriate dashboard.

2. Locate the **Shop** widget. If the widget is defaulted to simple search, click the **Advanced** tab. The Advanced Search page opens, displaying search fields that can be used to filter your search results.

3. Select **Antibodies** from **Advanced Search** vertical selection drop-down menu.

4. Once Antibodies is selected, search criteria specific to antibody searches display.

5. Select the appropriate category, conjugate, or host from the respective pull-downs if appropriate.

6. After defining your criteria, click the **Search** button. The search results display at the bottom of the screen. Antibody Search results contain additional columns relevant to Antibodies.

Product Search - Go To Options

Overview

Go To: product search options provide quick links to Favorites and Forms searches, a link to the Service Item Default Form (if enabled for your organization), and links that open windows for users to enter information for trade-in items, non-catalog items and quick order items.
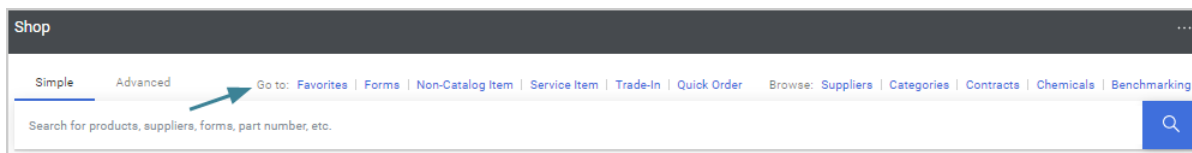
The image above shows the **Go To:** options in the **Shop** widget, but the same options are also available from the main menu and other shopping pages:

- *From the main menu* - Navigate to **Shop** ▭ **> Shopping**. The Shopping slide-out menu displays. Click one of the options under the **Go To** subheading.

- *From the Shopping Home page* - Navigate to **Shop** ▭ **> Shopping > Shopping Home** if the Shopping Home page is not your default home page. Locate the **Shop** widget. Click one of the options in the **Go To:** section.

- *From a dashboard* - Open the appropriate dashboard. Locate the **Shop** widget and click one of the options in the **Go To:** section. Depending on your organization's setup, **Go To:** links may also be available in a **Quick Link** widget on a dashboard.

- *From the Search Results page* - The **Shop** widget is displayed at the top of the Search Results page. Similar to the Shopping Home page, click the one of the options in the **Go To:** section.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Favorites and Folders

You have the ability to search for favorites and folders in the View Favorites page. This is useful when you have saved a large number of Favorites or folders. Favorite search works similarly to product search. Users with permission to view and use personal favorites will be able to search personal folders. Users with permissions to view shared folders, or who have access to specific shared folder, will be able to search those folders.

1. Open the **Favorites** page as indicated above.

2. Choose one of these options:

   - *Open a folder* -Click on the folder name in the left menu. Favorite items within the folder are displayed on the right. Click on an item name to access the item.

   - *Search for an item* - Click Q Search . Enter a search term in the text field, then click [Q] to execute the search. Items that match the search text are displayed. Folder matches are displayed first, followed by item matches.

Forms and Requests

Forms and **Requests** can be stored with your Favorites. They can be accessed by going to your Favorites but can also be accessed through the various **Form** links available in the application. Accessing forms and requests through your Favorites will display all favorites including item favorites, whereas accessing them through the Forms link will display only forms and requests.

1. Access forms in one of the following ways:

   - *From the main menu* - Navigate to **Shop**   **> Shopping**. The Shopping slide-out menu displays. In the **Go To** section, click **View Forms** or **View Favorites**.

   - *From the Shopping Home page* - Navigate to **Shop**   **> Shopping > Shopping Home** if the Shopping Home page is not your default home page. Locate the **Shop** widget. In the **Go To** section, click **Forms** or **Favorites**.

   - *From a dashboard* - Open the appropriate dashboard. Locate the **Shop** widget. In the **Go To** section, click **Forms** or **Favorites**. The Forms and Favorites links may also be available in a Quick Link widget on a dashboard.

   - *From the Search Results page* - The **Shop** widget is displayed at the top of the Search Results page. Similar to the Shopping Home page, click **Forms** or **Favorites** in the **Go To** section.

2. The **View Forms** or **View Favorites** page displays. Select the **Shared** or **Personal** folder to access a form or request from that folder.

Non-Catalog Items

You can quickly and easily add non-catalog items to your cart. Non-catalog items should be entered when a requisitioner cannot find the item needed from hosted or punch-out catalogs. Entering non-catalog items is also required when items are very new to the market and/or have not been added to available catalogs.

The **non-catalog item entry screen** is an overlay "popup" that can be accessed from many different places in the application. The screen is easy-to-use and allows for quick entry of non-catalog items.

Your organization may or may not allow non-catalog items. Please contact your System Administrator if you are unsure if non-catalog ordering is available.

Service Items

If your organization has enabled a **Service Item Default Form**, the option to add a service item is available in these locations:

- *From the Shopping Home page* - Navigate to **Shop** ⬛ **> Shopping > Shopping Home** if the Shopping Home page is not your default home page. Locate the **Shop** widget. In the **Go To** section, click **Service Item**.

- *From a dashboard* - Open the appropriate dashboard. Locate the **Shop** widget. In the **Go To** section, click **Service Item**.

- As a **Go to:** option on the search results page.

- In the **Shopping Cart**, **Requisition** and **Purchase Order** as a **Service Item** option, or within a supplier group as a link **Add Service Item...**

Trade-Ins

Many customers may need to make purchases for equipment when there is a used piece of equipment they can trade in to offset the cost of a new purchase. Organizations can choose to allow users to enter trade-in items with a purchase for such needs.

When the trade-in feature is configured, and a user has the appropriate permission, the option to add a trade-in item is available in these locations:

- *From the main menu* - Navigate to **Shop** ⬛ **> Shopping**. The Shopping slide-out menu displays. In the **Go To** section, click **Trade In**.

- *From the Shopping Home page* - Navigate to **Shop** ⬛ **> Shopping > Shopping Home** if the Shopping Home page is not your default home page. Locate the **Shop** widget. In the **Go To** section, click **Non-Catalog Item**.

- *From a dashboard* - Open the appropriate dashboard. Locate the **Shop** widget. In the **Go To** section, click **Non-Catalog Item**.

- As a **Go to:** option on the search results page.

- In the **Shopping Cart**, **Requisition** and **Purchase Order** as an **Add Trade-In** option, or within a supplier group as a link **Add trade-in for this supplier...**

Quick Order

Quick Order is used when the exact product catalog number (SKU) is known. Both the supplier and manufacturer part numbers are searched when using **Quick Order**. If the catalog number entered is an **exact** match to a product in the hosted catalogs, and there is only one match, the

product is automatically added to the shopping cart. If an exact match is not found or more than one product is found, Search Results are presented to allow for the selection of the appropriate product. Quick Order allows you to order one or more products simultaneously.

1. Access **Quick Order** as indicated above.

2. To quick order for a specific product vertical, select an option in the **Category** field (this is optional).

3. Enter the catalog number(s) in one or more of the **Part Number (SKU)** fields. If you would like to add the SKU automatically, it is important to enter the SKU exactly as the supplier has it listed. You should include periods, dashes, parenthesis, units of measure, etc.... whenever this type of information is included in the supplier's identification.

4. Click the **Add to Active Cart** button. One of the following actions will occur:

   - If the catalog number entered is an exact match to a product in the hosted catalogs and there is only one match, then the product is automatically added to the shopping cart. This information displays on the bottom of the screen.

   - If an exact match is **not** found or more than one product is found, Search Results are presented to allow for the selection of the appropriate product.

   - If no search results are found, a message will display. If your organization allows non-catalog ordering and you have the appropriate permissions, the Add Non-Catalog Item button will display. Click the button to add the item. For additional information, please see Non-Catalog Items.

Product Search - Browse Options

Overview

Browse: product search options allow users to search for suppliers, shop by categories, search for contract, and if enabled, chemicals, and links to benchmarking options.
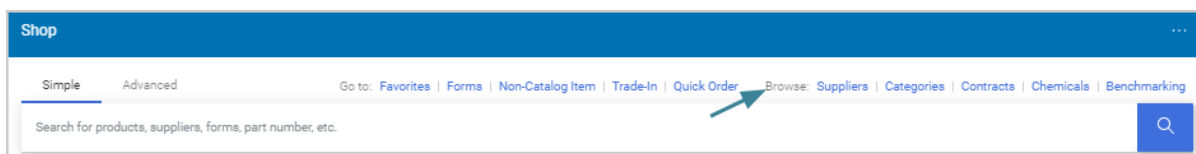
The image above shows the **Browse:** options in the Shop widget, but the same options are also available from the main menu and other shopping pages. You can access the Browse options in the following ways:

- *From the main menu* - Navigate to **Shop ▱ > Shopping**. The Shopping slide-out menu displays. Click one of the options under the **Browse** subheading.

- *From the Shopping Home page* - Navigate to **Shop ▱ > Shopping > Shopping Home** if the Shopping Home page is not your default home page. Locate the **Shop** widget. Click one of the options in the **Browse:** section.

- *From a dashboard* - Open the appropriate dashboard. Locate the **Shop** widget and click one of the options in the **Browse:** section. Depending on your organization's setup, **Browse:** links may also be available in a **Quick Link** widget on a dashboard.

- *From the Search Results page* - The **Shop** widget is displayed at the top of the Search Results page. Similar to the Shopping Home page, click the one of the options in the **Browse:** section.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Browse Products by Supplier

The Browse by Supplier functionality is much like using a table of contents from a paper catalog. Once the desired category of products is found, a single click takes the user to all the products provided by that supplier in that selected category.

1. Access the **Browse by Supplier** feature. By default, all suppliers display. Preferred suppliers display first and after that, suppliers are displayed in alphabetical order.

2. To search for specific suppliers click on the **Click to expand Search for Supplier Filter** button. Enter the criteria and execute the search. Search results display.

3. Click on the **Supplier Name**. The supplier information and categories display.

Browse Products by Category

Browse by Category provides a quick way to locate all items – across all suppliers – within a specific category. You can access these items by drilling down from the highest level of the

category, such as Lab Supplies, Office/Computer, etc. (depending on categories that are active for your organization) to the available sub-categories. Once you have located the appropriate category a single click takes you to all products provided by all suppliers in the selected category.

1. Access the **Browse by Category** feature. A full list of available categories, across all hosted catalogs is displayed.

2. Select the appropriate main category and begin to drill in to the sub-categories. Clicking the **view** link will display all items within that category in product search results. If you choose to view items in a category that has sub-categories, ALL items in both the category and sub-categories displays in the search results.

3. The search results page displays all of the items in the category selected for all suppliers.

Browse Products by Contract

The Contract Compliance Tracking feature is designed to allow all types of users to have the appropriate access to contracts. Contracts can be set up so that all users can see the details of the contract, or in such a way that users have limited or no visibility.

Users can view contracts four different ways:

1. **Through Product Search**. When a shopper or requisitioner performs a search for an item or service that "matches" a contract, a link to the contract displays in the search results. The user does not necessarily know they are "looking for" a contract, but you are able to guide them to select the correct supplier/item. For more information, refer to Contract Items.

2. Through the **Browse > Contracts** option on the Shopping Home page or a dashboard. You will be taken to the **Search Contracts** page where you can search for, review, and update contracts (if you are a contract manager/owner).

3. Select the **Contracts Home** page. This selection will take you directly to a listing of current contracts. From there, you can search for, review, and update contracts (if you are a contract manager/owner).

4. Through the **Supplier Info** pop up window. This window can be accessed from many places in the application by clicking on the highlighted/bold Supplier Name. From the pop-up, click on the **Contracts** tab to view the contracts for the supplier. Only contracts that you (the user) have access to are displayed. The Supplier pop-up can be accessed from the cart, from the product search results, by browsing by Supplier, and a number of other locations in the system.

Chemical Structure Searches

The Chemical Structure Search is a tool geared specifically to chemists. This searching tool allows chemists to search for commercially available products by drawing structures and sub-structures. Additional parameters can be included to refine search results including chemical name, CAS Number, molecular weight and molecular formula.

Users can mark and save structures of interest between login sessions. Products are displayed according to the supplier hosted catalog data your organization has enabled.

Chemical Structure Search Engine

The Chemical Structure Search is powered by **JChem**, which supports superstructure, substructure, similar, exact, and duplicate type searches. Most chemists are interested in substructure searches. Chemical structures are uploaded into the system using an **.sdf** file that is linked to a supplier's hosted products. Once the product is linked to a structure, chemists can search for the product or chemical structure. In order to structure results for a product, keep in mind:

- The user must have the ability to view the supplier's products. For example, they cannot be assigned a product view that limits the products being displayed.

- The information that is displayed is dependent on the structure or sub-structure data that is provided by the supplier for their products.

- The supplier must be enabled by your organization in order for search results to display.

- See Chemical Structure Searches for complete instructions.

1. Access the chemical structure search feature in one of the following ways:

    - *From the main menu* - Navigate to **Shop** ⬚ **> Shopping**. The Shopping slide-out menu displays. In the **Browse By** section, click **Chemicals**.

    - *From the Shopping Home page* - Navigate to **Shop** ⬚ **> Shopping > Shopping Home** if the Shopping Home page is not your default home page. Locate the **Shop** widget. In the **Browse** section, click **Chemicals**.

    - *From a dashboard* - Open the appropriate dashboard. Locate the **Shop** widget. In the **Browse** section, click **Chemicals**. The Chemicals link may also be available in the Quick Link widget on a dashboard.

Benchmarking via SmartProcure

JAGGAER has partnered with **SmartProcure** to give customers access to benchmarking data. An add-on license is available that will allow users with the appropriate permission to access the SmartProcure website to view Benchmarking data.

A user must have the **View Benchmarking via SmartProcure** permission to access the SmartProcure site. The permission is available in the **Administration > System Administration** section of the user profile and user roles. When the permission is enabled, a **Benchmarking** hyperlink is available in the **Go to** section on the **Shopping** home page. Upon selecting the link, users are navigated to the **SmartProcure** website.

Understanding Product Search Results

Overview

The contents of the search – or result set – is determined by what is being searched and what type of search is performed (simple search, search by supplier, etc.). Search results display different types of shopping results, including hosted and punch-out items, links to punch-out suppliers, along with recommended forms and contracts.

Note: Setup is required by an administrator or the supplier in order for different item types to display other than hosted supplier items.

Important Note: Items in the search results display in a user's preferred currency. See the **Currency Converter** section below.
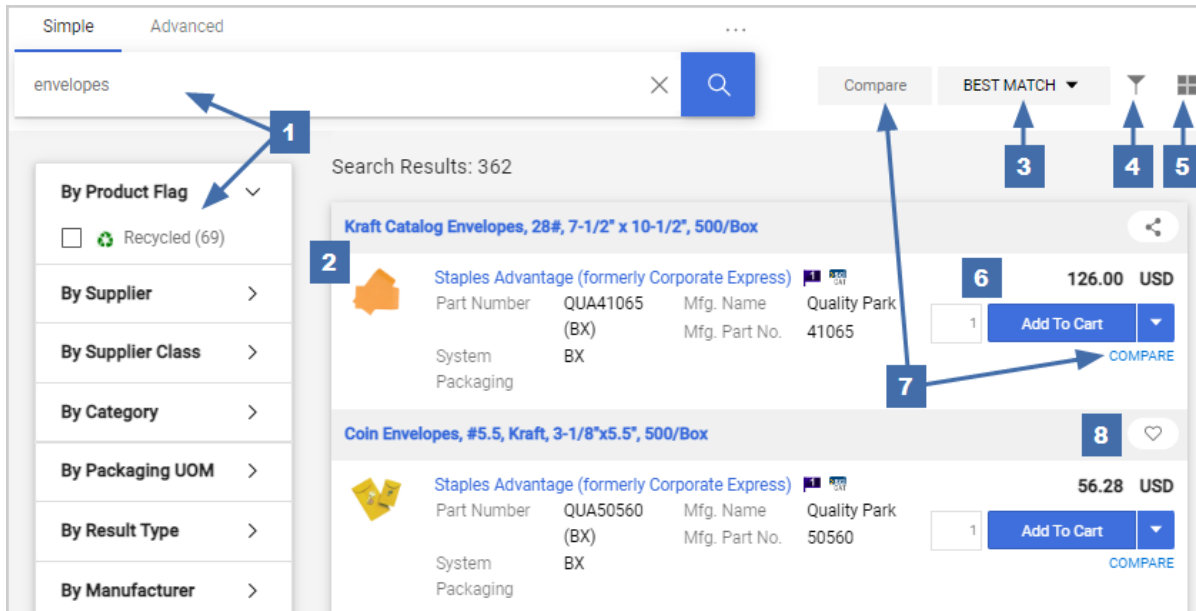
1. **Refining search results:** You can refine your search results directly from the results page. To refine using a keyword, enter a value in the search field and press Enter or click the search icon next to the field. The search can also be refined by using the **filter** options along the left side. The available filter criteria depends on which options are relevant and what options your organization has chosen to enable. For example, if there are no product flags (green, energy star, etc.), this filter option does not display. The **Show all** link indicates that there are additional filter options that are not displayed. Click the link to show the options. To enable one or more filters, click **Select Multiple Items** ⬕ in the filter panel, then click the checkbox next to each filter you wish to enable. The selected filters are displayed at the top of the column under Your Selections. Remove a filter by clicking the X icon next to it.

2. **Item and supplier information:** Basic information is provided for each item in the search results. Information includes item name, supplier name, part number and manufacturer information. Price for each item is located in the top right corner of the item listing. Supplier flags are displayed to help you determine if the item is from a preferred supplier, science catalog supplier, etc. Click on the item name for more detailed information about the item. Click on the supplier name for additional information about the supplier.

3. **Sorting search results:** By default, product search results are listed in the "best match" order which considers keyword relevance, along with preferences such as supplier classes and favorites. Users can choose to sort the result set a number of additional ways after the initial search is performed. Select the appropriate sort option from the drop-down field.

4. **Show or hide filters:** Click the filter icon ▼ to show or hide the left sidebar.

5. **List and grid views** - In the search results page, you can switch between **list** ☰ view, or you can click the **grid** ⊞ icon to view items as tiles in a "sticker" format. The grid view displays 1-6 columns of tiles, depending on the size of the screen. In the grid view, you can click the ⚙ icon to choose which product details are displayed on the tiles.

6. **Add an item to a cart, requisition or purchase order:** You can choose to add the item to your active cart or to a draft cart, to a pending purchase order or pending requisition, or to a completed purchase order (which will create a PO revision). Enter a number in the quantity field (it defaults to *1*) and select one of the following options:

   - **Add to Cart** - To add the item to your active cart, click the **Add to Cart** button. This will add the item to your cart and you remain on the search results page.

   - **Add and checkout** - This option will add the item to your cart and take you to the checkout page.

   - **Add to Draft Cart or Pending PR/PO** - A window displays with all of the available draft cart and PR and PO options available to you. Click the radio button for the appropriate option and then click **Add**.

   - **Add to PO Revision** - A window displays with all of the available completed purchase orders that an item can be added to. Select the + icon next to appropriate PO to add the item to the purchase order. The application will add the item to the purchase order and create a purchase order revision, which will need to be finalized to process the order. The screen will close once the item has been added to the purchase order.

7. **Using the comparison function:** Side-by-side comparisons are a good way to determine which product is best suited for a particular need. The **Compare** function allows the selection of two or more products to do a direct side-by-side comparison of the product attributes of each. This function also allows you to determine the best pricing by auto-calculating prices based on Unit of Measure or Product Size. Click **COMPARE** for each of the items to include in the comparison. The **Compare** button at the top of the search results becomes active once more than one item is selected. Click the button to open the comparison screen. See the **Compare Search Results** section below for more information.

8. **Add an item to your favorites:** Items that display in the search results can be added to your shopping favorites. To add the item as a favorite, simply click the Add Favorite icon ♡ . The Add Favorite overlay opens, where you can add the item to a shared or personal folder.

What is Being Searched?

When most searches are performed, the search engine considers the following:

- **Keyword information** from contracts and contract items, favorites, supplier profile data, and forms. This information is set up by system administrators and is designed to direct end-users to the right items or services for purchase.

- **Item Data** provided by suppliers such as product description, unit of measure, manufacturer, and more. For a full list of item data being searched, refer to "Simple Search" on page 68.

Search result details and "How to's"

Search results display below the simple and Advanced search. Below are detailed explanations for the search results user interface:

- **Search listing** - By default, items and recommended services, suppliers, etc.... are presented in the **Best Match** order - Hosted products are displayed with an image (if available), along with product description and product detail information. Form recommendations, contract recommendations, and punch-out items can also be accessed from the search listing.

- **Sort by** - After the search is performed, a user can choose to re-sort the data by part number, product description, price, and more.

- **Refining the search through keywords** - You can filter the search results by adding additional keywords into the search field at the top of the page.

- **Refining the search through filters** - You can filter the search results by selecting specific suppliers, product categories, supplier classes, manufacturers, units of measure, result types (product, punch-out item, etc.), product flags (green, energy star, etc.), or custom catalog attributes. These filter options are found on the left side of the screen after a search is performed. **Note:** Not all filter options are available for every search and some organizations choose to disable some of the filter options.

- **Icon definitions** - Both supplier classes and product attributes are identified with icons. Supplier class icons are displayed to the right of the supplier name. The product icon is displayed to the right of the product description. Mouse-over any of the icons to display an item-specific legend for supplier classes or product flags as shown below.

- **Adding items to your cart** - To add an item listed in search results to the shopping cart, click the **Add to Cart** button. By default, the quantity is one, but it can be updated to order more. **Note:** Some organizations and some supplier support partial quantities for ordering of goods and services. For example, you can order 1.5 hrs of service from a consultant. If your site is set up in this manner, enter the whole or decimal number in the quantity field. The drop down menu on the Add to Cart button also provides additional options to **Add and checkout**, **Add to Draft Cart or Pending PR/PO** and **Add to PO Revision**.

- **Adding items to your favorites** - You can also add items from your search results to your favorites. For more information, refer to Product Search - Go To Options.

- **Comparing items in search results** - From the search results, product details can be compared to determine which one should be ordered. For more information, refer to **Compare Search Result**s, below.

- **List and grid views** - In the search results page, you can switch between **list** ▤ view, or you can click the **grid** ▦ icon to view items as tiles in a "sticker" format. The grid view displays 1-6 columns of tiles, depending on the size of the screen. In the grid view, you can click the ⚙ icon to choose which product details are displayed on the tiles.

Search Result Order

A common question from users is: "What determines the order in which products and services are returned in search results?" There are numerous factors that dictate the order in which products are returned within Search Results. The search engine determines the initial sort based on keyword relevance. Preferences – such as preferred suppliers and favorite items determine the final listing.

The search engine finds all the products and recommended forms, services, and contracts that should be considered for search results. Products with the greatest number of matching words are ranked higher than those with fewer. For example, if four words were entered as keywords in Simple Search, the product s and services containing all four are ranked higher than those containing three.

What is keyword relevance?

The relevance weighting calculated by the search engine is the primary factor for determining the product order in search results. Products with the highest relevance are presented first. Products with the second highest relevance are returned second, and so forth. Products with the same relevance are sorted alphabetically by supplier name. Products with the same relevance and supplier have no predefined sort order.

How do categories affect keyword relevance?

The relevance calculation is most accurate and effective when a category (vertical) is selected when using Simple and Advanced search. By default, the "general" category (Everything) is selected, but it is highly recommended to select an appropriate category (Lab Supplies, Office Supplies, etc.) to reduce the number of irrelevant results.

How do organization-specific preferences affect search results?

After the search engine identifies the initial order of items and services to be presented, which is based on keyword relevance (described above), organization-specific preferences are considered.

Preferences that affect search results include:

- **Custom Catalog Attributes**, which are also called CCA, allow organizations to "tag" items with organization-specific attributes to direct the user to these items. For example, an organization may mark certain items from suppliers as "Hot List" or "Great Buy." Custom Catalog Attributes are identified by an icon shown with the item description. Additionally, search results can be filtered by Custom Catalog Attribute ("Show me all Hot List Items").

- **Supplier-Category Preference** - System administrators can assign a preference from 1-10 to a specific supplier for specific category of items. For example, ABC Supplier is your primary vendor for desks, therefore they would be tagged for this specific item category. Supplier-Category Preferences are identified with a 1-10 icon, which displays in product details.

- **Supplier Class Preference** - System administrators can assign preferences to a specific supplier by using supplier classes. Most, but not all, suppliers with a preference assigned (from 1-10), are also assigned an icon to visible indicate the preference. Some examples of supplier classes are **Local Supplier**, **Minority Owned Business**, **#1 Supplier**, etc.... Supplier classes are assigned at the overall supplier level – not for specific items or item categories. Sample icons:

- **Shared Favorites** - This includes items and forms designated as a favorite for the entire organization or those designated for certain groups, such as departmental favorites. Shared favorites are identified by this icon to the left of the Add to Cart button 🏡.

- **Personal Favorites** - This includes items and forms designated as a favorite at the user level. These favorites can only be viewed and accessed by the user. Personal favorites are identified by this icon to the left of the Add to Cart button ⭐.

Detailed look at order of search results

For the average user, understanding that the search results are derived from the keywords entered, then preferences, is sufficient. Below is a detailed explanation of the search results order:

1. **Keyword Relevance** determines what group of items displays first, then second, etc.... This is the most important criteria in determining search results order. Relevance is grouped by weighting (as described above). Within each grouping, the items are organized based on the preferences described in #2 below. The ranking for keyword relevance is listed below:

   a. **Exact match on Part Number.** Many of the searches performed are on part number, which is also called Catalog # or SKU search. An exact match on this will send an item to the "top of the list."

   b. **Exact match on Product Description.** If all of the keywords entered are found in the Product Description for a hosted item, it displays second.

   c. **Exact match for Supplier, Manufacturer, Category, Packaging, and Keywords** displays next. With the exception of keywords, this information is all derived from catalog (item) data provided by the supplier. Keywords are searched against information set up by administrators including:

      - Contract keywords (to recommend contracts to use)
      - Contract Items (to recommend specific items on contract)
      - Form keywords (to identify recommended services or forms to populate)
      - Supplier Keywords (entered in supplier profile to direct users to shop with supplier for certain goods/services)

      > **Note:** For exact matches, the search engine allows for hyphens, spaces, and special characters. For example, it will consider ABC 123 an exact match for ABC-123.

   d. **Partial match on Part Number**. If the user enters a component – or part – of the Part Number – these items are returned next in search results. For example, a user may enter EA12 and the search results may include Part Numbers of EA123, EA124, EA12556, etc.

   e. **Flexible match on Product Description.** Flexible match is different than a partial match in that it doesn't have to be "exactly" like the description. For example, misspellings are accommodated, part of words, etc.

f. **Flexible match on Supplier, Manufacturer, Category, Packaging, and Keywords**. All items with a flexible match to the fields listed above (both from item data and administrator setup), display next.

2. **Preferences** determine the order of items within relevance grouping. The ranking for preferences is listed below:

   - Custom Catalog Attributes
   - Supplier Category Preference
   - Supplier Class Preference
   - Shared Favorites
   - Personal Favorites

Currency Converter

After the preferred currency is selected by a user, the system displays information in this currency whenever possible (when items and prices are available). Occasionally, a user may decide to view product information in a different currency – either the supplier's currency (the business currency) or another currency the user has permission to view/use. In this task, we will use the currency converter to view information on the screen in different ways.

1. Perform a product search. Notice that the results are displayed in the user's preferred currency.

2. Click on your user menu in the top-right banner.

3. Select **Change Preferred Currency**.

4. A dialog box will display with all available currencies. Click the **select…** link for the appropriate currency.

5. The items will display in the search results with the updated currency. **Note:** The prices will be calculated based on your organization's exchange rates.

Compare Search Results

Side-by-side comparisons are a good way to determine which product is best suited for a particular need. The **Compare** function allows the selection of two or more products to do a direct side-by-side comparison of the product attributes of each. This function also allows you to determine the best pricing by auto-calculating prices based on Unit of Measure or Product Size.

Note: The product comparison feature can only be used to evaluate HOSTED catalog items. Items from punch-out suppliers do not display in the search results, therefore cannot be part of the side-by-side product comparison.

1. Search for products using any of the search tools.

2. In the search results, click the **COMPARE** button for each item you want to include in the comparison. Items across multiple pages can be selected. The Compare button at the top of the search results will activate once more than one item is selected.

3. Once all items are selected, click the **Compare** button at the top of the search results to run the comparison. If you hover over the Compare button, the items that are selected for comparison are displayed in an overlay. You can click the X next to an item in the overlay to remove it from the comparison.

4. The Product Comparison page lists, vertically, all of the products selected for comparison. Product attributes are shown on the left side of the page. Scroll down to review the information for each item/attribute.

5. **Compare** items in the Product Comparison window using the options below. Close the window to go back to the original search results.

- Click on any of the links, indicated in bold text, for more information. These links typically open a new browser directed to the specific products webpage on the supplier's website.

- Click an option along the left side to sort by that attribute.

- Perform one of these actions:

    - **Remove an item** - To remove a product from the compare page, click the checkbox at the top of the product and select the X icon next to it.

    - **Add an item to your cart** - Enter a quantity in the **Quantity** field, then click the **Add To Cart** button, OR select the checkbox at the top of the item, go to the ACTIONS FOR SELECTED ITEMS menu, and select **Add To Active Cart**. The item is added to your cart.

    - **Add item to favorites** - Select the checkbox at the top of the item, go to the ACTIONS FOR SELECTED ITEMS menu, and select **Add to Favorites**. The Add Favorite window opens, where you can save the item to a Shared or Personal Folder.

External Marketplace Results (Amazon Integrated Search)

If your organization has enabled Amazon Integrated Search, users with punch-out access to an Amazon Business Marketplace supplier can shop for products from the Amazon Marketplace as follows:

1. Users shop for an item as usual, i.e., by entering a search term in the Shopping widget.

2. In the search results, the **External Marketplace Results** tab shows items from the Amazon Marketplace that match the search criteria. Items from all other suppliers are shown on the **Search Results** tab.

3. When the option to show delivery lead time is selected in the search results page (click the gear icon ⚙ on the search results page and select Delivery Lead Time), the product card will display Amazon delivery information.

Sharpie® Accent® Highlighters, Fluorescent
Yellow, Pack of 12, 25025
from Amazon.com

Part Number

B00006IEJ9

Delivery Lead Time

FREE delivery Wednesday, September 28
if you spend $25 on items shipped by
Amazon

10.09   USD

☑ Order From Supplier

4. If the Amazon supplier is selected as a filter, **Amazon departments** are displayed as
    options in the filter panel. The Amazon departments shown will vary based on the supplier
    selected and the search criteria.

If users select an Amazon department filter, additional Amazon filters that correspond to the department are displayed. Additional filters are only displayed if **one** Amazon department is selected.

5. Users can click on an Amazon item's **product description** in the search results to display the product card and view details about the item. The Amazon Product Details overlay shows much of the same information as the regular search results Product Details overlays. In some cases, there may be more information provided about the Amazon product than is typically seen on the hosted Search Results tab. It has an additional **About This Item** section that provides more information about an item.

Note: Product details vary widely. JAGGAER displays this information as it is provided by Amazon so there may be inconsistent information from product to product. In many cases not all information shown in the regular Product Details overlay (such as the Manufacturer Part Number) will be provided.

6. Users can click the ☑ **Order From Supplier** button to select an item. They will be directed to the item in Amazon, where they can add the item to their cart. Once the item is placed into the cart in Amazon, the user will be returned to JAGGAER to complete the ordering process.

Note: If an item is not available, a message will indicate that it is not available for purchase and the ☑ **Order From Supplier** button is not displayed.

Additional notes about the **External Marketplace Results** tab:

- External Marketplace Results are returned and sorted in an order determined by Amazon.

- The Show Details options ⚙ are displayed differently in this tab. The manufacturer name and number are provided only for some items, and the part number is Amazon's Standard Identification Number (ASIN).

- Not all shopping functionality is available at this time. For example, users can't use the Compare or Sort options. Additional functionality is planned for future releases.

- For **Amazon Business Prime** accounts, the Amazon administrator has the capability of adding Buying Policies. The policies can be to mark items in the catalog as Restricted, Preferred or Blocked. If an item is **Preferred** or **Restricted**, an icon will be displayed next to that item in the External Marketplace search results. When a user punches out to Amazon, they will see a note at the top of the screen providing more information about that flag. **Blocked** items are not returned in the External Marketplace Results.

  The Amazon Business account administrator can set these policies with additional messaging that appears on the product in the punch out. JAGGAER does not set the flags for items or notes.

- There are limited **Advanced Search** options available. A note on the Advanced search tab indicates that only the **All of these Words**, **Supplier**, and **Part Number (SKU)** search fields can be used for an External Marketplace search. All other search terms are ignored. To search for a supplier, users must enter a supplier name and include a value for one of the other fields. For example, search for "All of these Words + Supplier" OR "Part Number (SKU) + Supplier". Users cannot search for a supplier only.

- If configured by your organization, users with punch-out access to the supplier can shop from an Amazon supplier sticker in a shopping showcase on the Shopping Home page. Entering a search term in the sticker will take users to the search results in the **External Marketplace Results** tab in JAGGAER. Amazon supplier stickers may also be configured with an external link that will take them to the Amazon site.

Empty Search Results

Sometimes you may receive no results when searching for items in the product search. The reason for empty search results can vary but is typically related to the supplier, form or item selections available to the shopper. Often you can remedy these issues by changing keywords or adding forms or hosted catalogs. If you continue to get no search results, there are a few options for managing and reporting issues with search results.

View tips for improving search results

The application provides hints and tips for improving search results when none are found.

1. When there are no search results, you will receive an error message indicating that no items were found. Tips are displayed below the error message.

2. Make adjustments to your search criteria and re-try the search.

Find previous orders of an item

In some cases, you may search by Part Number (SKU) for an item that you or someone in your organization have purchased previously and get no search results. You can search for documents (requisitions, purchase orders, invoices) that contain the part number. Note that you will only have access to those documents that you would normally be able to access through document search.

1. Select the **View Previous Orders** button below the Search Results error message.

2. You will be taken to search results with documents from previous orders.

Provide feedback to your site administrator

When you receive no search results, you can send a message to your Site Administrator.

1. Select the **Submit Search Feedback to My Administrator** link below the Search Results error message.

2. A dialog box will display. The message will be pre-populated with the original error message. You can override this message with your own text or simply add to it.

3. Select the **Submit** button. Your feedback will be submitted for review. Note that any administrator response will be sent to the email address in your user profile.

Chemical Structure Searches

Overview

The Chemical Structure Search is a tool geared specifically to chemists. This searching tool allows chemists to search for commercially available products by drawing structures and sub-structures. Additional parameters can be included to refine search results including chemical name, CAS Number, molecular weight and molecular formula.

Users can mark and save structures of interest between login sessions. Products are displayed according to the supplier hosted catalog data your organization has enabled.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Chemical Structure Search Engine

The Chemical Structure Search is powered by **JChem**, which supports superstructure, substructure, similar, exact, and duplicate type searches. Most chemists are interested in substructure searches. Chemical structures are uploaded into the system using an **.sdf** file that is linked to a supplier's hosted products. Once the product is linked to a structure, chemists can search for the product or chemical structure. In order to structure results for a product, keep in mind:

- The user must have the ability to view the supplier's products. For example, they cannot be assigned a product view that limits the products being displayed.

- The information that is displayed is dependent on the structure or sub-structure data that is provided by the supplier for their products.

- The supplier must be enabled by your organization in order for search results to display.

Perform a Chemical Structure Search

1. Access the chemical structure search feature in one of the following ways:

   - *From the main menu* - Navigate to **Shop** 🔲 **> Shopping**. The Shopping slide-out menu displays. In the **Browse By** section, click **Chemicals**.

   - *From the Shopping Home page* - Navigate to **Shop** 🔲 **> Shopping > Shopping Home** if the Shopping Home page is not your default home page. Locate the **Shop** widget. In the **Browse** section, click **Chemicals**.

   - *From a dashboard* - Open the appropriate dashboard. Locate the **Shop** widget. In the **Browse** section, click **Chemicals**. The Chemicals link may also be available in the Quick Link widget on a dashboard.

2. **Define the criteria.** The criteria that is entered or selected determines the structure search results. **A user can perform any combination of the following:**

   - **Enter criteria** in the fields at the top of the screen, including: Product Name, CAS Number, Molecular Formula, Molecular Weight, Search Type, and Results per page. Entering data in all of these fields is optional, but is a way to narrow down your search and can be used in combination with the drawings at the bottom of the screen. **HELPFUL TIP:** Click on the field label for any of these criteria options to access Help for the field, which contains detailed information about the option.

   - **Paste** an existing structure or sub-structure into the drawing block. This is a helpful tool for many scientists who have structures available in other tools such as **Isis Draw**. You can paste an existing structure either by selecting the **Paste** icon from the top toolbar, **right-clicking** and selecting **Paste**, or using the **Ctrl+V** shortcut on your keyboard.
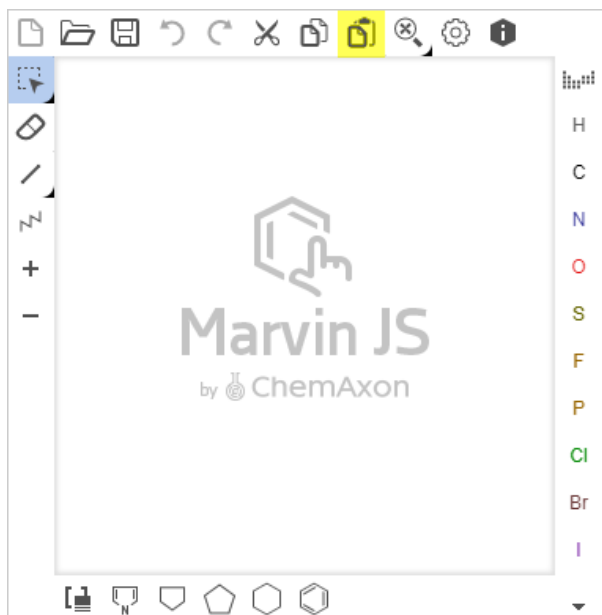
- **Draw** a structure or sub-structure in the drawing block. With this option, simply select the entity that you would like to add to the drawing block and click the mouse within the drawing block. In the example below, the Benzene ring icon was selected, and two rings were added to the drawing block by clicking the mouse twice. Click the chemical symbols along the right to add them to the drawing block or click the symbol at the top of the column to open the Periodic table.
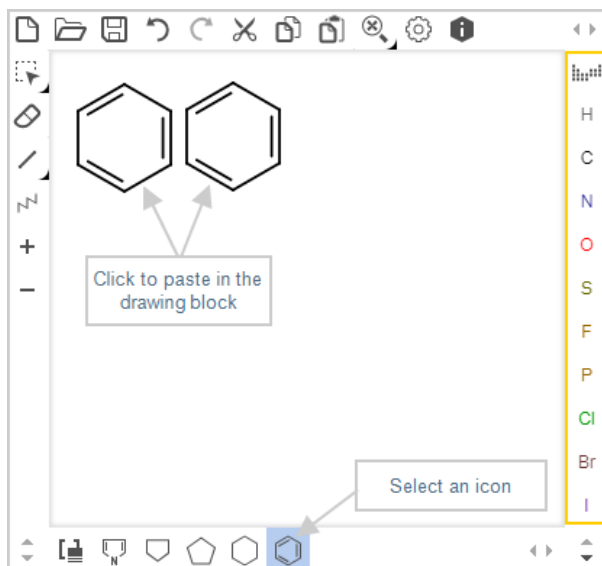
3. Make any changes to your drawing by using the Clear, Select, Delete, and the other options available. The icons along the left side of the drawing block can be used for these tasks. Pause your mouse over an icon to view its function. To learn more about how to

create drawings – and how each of the options work – refer to the Marvin JS User's Guide, provided by the manufacturer on their website here.
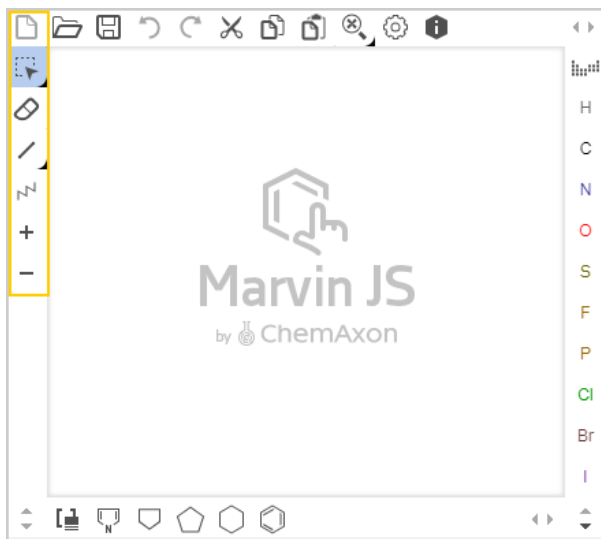
4. Click the **Search** button to search for matching structures. Structures display in order of relevance. An example of the chemical structure search results screen is shown below.

5. Review the list of structures.

   - To see the products that match a single structure, click the **Search Catalog** button above the structure.

   - To see products for multiple structures, click on the **X** in the right-hand corner of each structure, then select **Search Catalog > Go** from the Available Actions drop-down box.

   - If you cannot find the structure you are looking for, you can either edit your current criteria by selecting the **Edit Query** button above the search results OR select **New Search** to remove existing search criteria and start new.

   - **Marking results:** You may want to mark certain structures for review later. You can temporarily "hold" all of your marked structures, from one or more searches and across multiple logins. To mark a structure, click the **Mark** button above the structure picture. Click the **view...** link in the top right corner to view the currently marked structures or click **clear all...** to remove the "marks" for each of the structures. **Note:** This does not remove the structures from the result list. Here is an

example of marked structures after the **view...** link is clicked.

6. The product results – if any – display. From this screen, you can add items as you normally would. If no items display, this is an indication that the "matching" hosted catalogs are not enabled at your organization or that the user does not appropriate permissions to view the item(s). **Note:** You have the option the go back to the structure results and select different structures to view potentially different results. Click the **return to chemical search** link above the product search results.

Product Search Tips

Search Do's:

Below is a list of recommendations in terms of "good things" to do when searching:

- Start with **Simple Search** and use **specific keywords**.

- Select a product vertical (Lab Supplies, Office/Computer, etc.) if you are receiving irrelevant search results. By default, all product verticals are searched (Everything). The search works differently within each category vertical, therefore the results are typically much better when a vertical is specified. If you are not seeing an expected vertical, contact your system administrator. For information about activating or deactivating categories, see "Activating/Inactivating Categories" in the online searchable help.

- Use **phrases** such as "red pen" or "hand soap" for more focused search results.

- **Plural Usage.** The search engine is designed to handle plurals and non-plurals, and will display the same search results in either case. For example, the search engine does not care if you type in "battery or "batteries".

- **Punctuation and Spacing**. For the most part, the search engine is able to ignore punctuation such as hyphens, dashes, and other miscellaneous characters. For example, you should get the same, or very similar results if **ABC-123**, **ABC123**, and **ABC / 123** are entered.

- **Your supplier data is a key factor in determining search results.** The search results ultimately depend on the number of items and suppliers enabled. As an administrator, make sure the "right" suppliers and "right" items are available to your end users or communicate to them otherwise. Here is an example of how varying supplier data affects search results: **123** is entered in the Catalog # field. In the search results, an item with a Catalog # of **123456** may display on one site but not another – perhaps because there are more items that more closely match the criteria based on the number of items available.

- **The more information, the better.** Many users become frustrated due to the large number of results, but are not entering enough specific information to produce quality results. If you know the supplier or manufacturer, enter those details. If you know the size of the product, enter that. The more information you enter, higher quality results are produced.

- **Misspellings**. The search engine is designed to accommodate misspellings. For example, misspelled "dispensirs" will return "dispensers" or "dispensing" (et al) in the results.

- **Product Size Searches** – The Unit of Measure is provided by the supplier. If the UOM entered by the requisitioner/shopper is slightly different, the system will accommodate these variations. For example, if **100 ml** or **100 milliliters** or **100ml** is entered, very similar results display.

- **Try other search techniques.** If you cannot find your item through traditional product search (simple or advanced search), consider looking for the item using various other search techniques including Browse by Supplier, Browse by Category, Quick Search, and more.

- Use **Advanced Search** if you are specifically searching for items with distinct attributes such as a part number, supplier, manufacturer name, custom attribute, etc.

- **When using Advanced Search, understand the search criteria options.** It is imperative that you understand how each of the search fields work on the screen so that you can select the appropriate fields to use for your search.

- Use search to find not only hosted products, but recommended suppliers, relevant services and forms, contracts to be used, and non-catalog items. (**Note**: Requires keyword setup by administrators.)

Search Don'ts:

Below is a list of things that do not work well when searching:

- Avoid entering **common terms** such as tube, bottle, water, paper, etc. unless they are part of a phrase being entered.

- Avoid entering **Abbreviations**. Abbreviations are only recognized if provided by the supplier.

- Avoid entering **Acronyms**. Acronyms are only recognized if provided by the supplier.

- Check your **spelling**. Although the system accommodates misspelled words, it is always better to enter accurate spellings for words.

- **Wildcards** such as asterisks (*) do not work and are not needed.

- **Weighting is not affected by recurring word usage.** For example, if a supplier puts the word Glove three times in the product description and once in the Product Name, it will not increase its chances of displaying at the top of the list.

What Next?... I didn't get the results I needed

After the initial search results, refine your search by:

- **Adding more keywords** (to the top of the screen or on the left-hand side.)

- **Filter by one or more attributes** (by supplier, category, UOM, etc.). Filter options are found on the left side of the screen.

- Use **Advanced Search** if you are specifically searching for items with distinct attributes such as a particular part number, supplier, manufacturer name, custom attribute, etc.

- **Sort the data** a different way – by part number, price, description, etc.... Options in drop-down above search results.

- **Search for a part number across all suppliers** by clicking on a Manufacturer Part Number in the search results (Manufacturer Info).

- **Think of other ways to "say" the same thing.** For example, instead of searching for Kleenex, search for tissues, instead of searching for lunch, shop for catering, etc.

- **Send a message to your administrator**. If you have exhausted all search methods and are still not getting the results you need, you can send a message to your System Administrator from the empty search results page.

Shopping Cart Items

Favorites

Overview

The **Favorites** functionality allows requisitioners to store items that are referenced or ordered on a regular basis. Favorite items can be added through search results and the checkout screens. Items that are tagged as favorites are stored in Favorites folders, which are managed from the Favorites page.

There are two types of **favorites** items: Personal Favorites and Shared Favorites. Personal favorites are those that an individual identifies for future purchasing. With personal favorites, folders and sub-folders can be created to manage the favorites; users have full control over items in their personal folders. Shared favorites and folders are set up by administrators, and can be set up for viewing/use for the entire organization or a subset – such as a department, specific users, or a specific role. Shared favorites typically represent frequently ordered products or suggested products for purchase.

The following types of items or requests can be saved as favorites:

- Hosted Items
- Punch-out Items
- Non-Catalog Items
- Populated Forms – any type – service requests, food requests, etc.

Related Permissions

Permission	Description	Location
View/Use Personal Favorites	Controls access to personalized favorites. Users with this permission can add favorites or personalized forms into personal folders.	Permission Settings > Shopping, Carts & Requisitions > Shopping
Administer Shared Favorites	Provides the ability to create shared folders for favorites and forms, and document search, and add items (favorites, forms, and document search saved searches) to the folders. Shared folders can be organization-wide or for a specific group of users.	Permission Settings > Shopping, Carts & Requisitions > Shopping

Permission	Description	Location
Create Shared Favorites Folders	This permission allows users to create and administer their own shared favorites folders. This permission does not allow users to edit carts created by others, create organization-wide shared folders, or access shared folders to which they are not added.	Permission Settings > Shopping, Carts & Requisitions > Shopping
Import/Export and Administer Shared Favorites	This permission allows a user to import and/or export their shared favorite folders and items. It also gives the user the same permissions as Administer Shared Favorites.	Permission Settings > Shopping, Carts & Requisitions > Shopping

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Favorites in the Product Search Results

Shared AND personal favorites are searchable and display in the search results. For example, you may order continental breakfast for a monthly meeting. The first month you fill out the **Food Services Form** on your site and choose to save it as a favorite. The next month you can simply enter "continental breakfast" in the product search and the populated form will display in the search results. Simply enter the number of people attending in the quantity field and click **Add to Cart**.

Favorites are identified in the search results as shown below. A share ⤳ icon identifies favorites that are saved in a shared folder and a heart 💙 icon identifies favorites that are saved in a personal folder.

Making an Item a Shopping Favorite

The Favorites functionality allows you to store items that are ordered on a regular basis. Based on your permissions, you may be able to save favorites as personal favorites or as shared favorites. You can add an item or items as a favorite from the product search results, from the shopping cart, when working in forms, or from the non-catalog item entry screen. Although the "starting point" may be different, the way in which favorites are added is the same.

1. Do a product search and locate the item you would like to add as a favorite.

2. Add the item as a favorite by clicking the ♡ icon. The **Add Favorite** screen will display.

3. Configure the favorite by completing fields in these sections. Fields with ★ are required.

    Edit Item Details

    - **Item Nickname** - Enter a reference name for the item. **Note:** The item name is entered by default.

    - **Quantity** - Enter the default quantity for the item. For example, if you always buy five cases of paper at a time, you may want the default quantity to be **5**.

    - **Description**- Enter a meaningful description for the favorite.

    Select or Create a Destination Folder

    - Select or create a folder in which to store the favorite. If you would like to add a new folder, click the **Create New** drop-down. Your personal folders will display in the **Personal** menu. If you have general access to one or more shared folders, those folders will display in the **Shared** menu. See the Create and Manage Shopping Favorites Folders section below for more information.

4. Click the **Save Changes** button.

Accessing the Favorites Page

Access your favorites in one of the following ways:

- *From the main menu* - Navigate to **Shop** 🗔 **> Shopping**. The Shopping slide-out menu displays. In the **Go To** section, click **View Favorites**.

- *From the Shopping Home page* - Navigate to **Shop** 🗔 **> Shopping > Shopping Home** if the Shopping Home page is not your default home page. Locate the **Shop** widget. In the **Go To** section, click **Favorites**.

- *From a dashboard* - Open the appropriate dashboard. Locate the **Shop** widget. In the **Go To** section, click **Favorites**. The Favorites links may also be available in a Quick Link widget on

a dashboard.

- *From the Search Results page* - The **Shop** widget is displayed at the top of the Search Results page. Similar to the Shopping Home page, click **Favorites** in the **Go To** section.

Add Favorite Items to Your Cart

The **Favorites** functionality allows requisitioners to store items that are referenced or ordered on a regular basis. Depending on your permissions, you may be able to add items from shared favorites folders in addition to your own personal favorites.

1. Open the Favorites page by selecting **Favorites** from the main menu, the Shopping Home page, the Search Results page, or from a dashboard.

2. On the left side of the page the folders to which you have access display. Folders are organized by **Personal** and **Shared**. **Note:** If you do not have access to any shared folders, the Shared folder group does not display. Conversely, if your organization only allows shared folders, personal folders do not display.

3. Locate the favorite(s) using one of the following methods:

   - Select the associated folder. The favorites in that folder will display on the right.

   - Search for the favorite by clicking on the search button Q Search above the folders. Enter a value in the field and click Q. The search results will display folder matches and item matches. Clicking on a folder match will take you to the folder and all items in that folder will be displayed. Clicking on an item match will take you to the item's folder with only that item displaying. You will have the option to display all items in the folder.

4. Information about the favorites is displayed, and the favorite will look similar to the image below. The favorite details include an image (if available), the item name, the supplier name, part number, manufacturer number, price per unit, and unit of measure (ea, box, carton, etc.):

5. You can change the quantity in the quantity field; add the favorite to the shopping cart; and edit, move, copy, or delete directly from the favorite details.

- If necessary, change the quantity and then click the **Add to Cart** (New shopping experience view) or [Add to Shopping Cart] (Classic experience view) button.

- You can add multiple favorites to your shopping cart. Click the checkbox located to the far right on each favorite then click the **Actions for Selected Favorites** drop-down menu and select **Add to Cart** / **Add to Shopping Cart**.

- A success message will display below the favorites. You can click on the message to view the shopping cart.

Create and Manage Shopping Favorites Folders

Folders and sub-folders are used to house favorite items, forms and requests. The Favorites navigation menu is used to create and define shared and personal favorites folders and items.

There are two types of folders – personal and shared. Personal favorites are only viewable by the user and are most commonly used. Shared folders contain favorite items, forms and requests that can be used organization-wide, or for a specified group of people such as a set of users, a department, a role or business unit.

- **Items** can be moved and copied between folders. Favorite items can also be added through search results and the checkout screens and they are displayed in folders on the Favorites page.

- **Top-Level Folders** can be edited or deleted. **Sub-Level Folders** can be edited, moved, copied, or deleted. These options are available from the **Folder Actions** menu located in the top-right corner of the folder screen.

It is a best practice to create folders that group related items. For example, you may organize all products from a specific supplier into one folder. You may use another folder to organize products for a single department. Still another folder might be products for new employees. Although folders can be easily moved, it's a good idea to put some thought into your folder structure before you begin adding folders. Any folder structure can be created by adding new folders and nesting sub folders within them.

Most users do not have permissions to add, edit, or manage shared favorites or shared folders.

Note: This task focuses on adding folders from the Favorites management page. Folders can also be created when you add a favorite. Other than the "starting point" of creating the folder, the same steps can be followed.

1. Open the Favorites page by selecting **Favorites** from the main menu, the Shopping Home page, the Search Results page, or from a dashboard.

2. Add a folder in one of the following ways.

   - To add a top-level folder, click the `Add New ▾` button located above the folders. Select **Top level personal folder** or **Top level shared folder**.

   - To add a sub-folder, locate and select the appropriate top-level folder. Click the `Add New ▾` button and select **Sub folder of the selected folder**.

3. Configure the folder fields. Fields with ★ are required.

   - **Name** - Enter a name for the folder.

   - **Internal Name** - Enter a name that the application will reference internally. This field cannot contain spaces and you will not be able to edit it once the folder is saved.

   - **Description** - Enter a meaningful description for the folder.

   - **Shared Folder Fields** - If you are creating a shared folder, configure the additional fields that are displayed in the **Folder Access** section. The fields in this section allow you to choose the users with whom you will share the folder:

     - **Allow Entire Organization** - Click this checkbox to allow all users with shared folder access to view the folder.

     - **Add Access** - Choose to share the folder with a specific Business Unit, Department, Role, or User. When you make a selection from the drop-down menu, a field displays in which you can select the value. Choose the appropriate value (business unit, role, etc.).

     - **Users** - In this section you can manage users selected in the Folder Access step. Click the appropriate radio button for the type of access you would like to grant the user or click the **remove** link to remove the user's access to the folder.

4. Click **Save Changes** to save the folder.
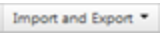
Move, Copy, or Delete Shopping Favorites in a Favorites Folder

You can move items and forms from one folder to another, and copy items from one folder to another. These features may be useful if you create a sub-folder for a specific type of items and need to move favorites added earlier, or when creating "repeat" items for multiple shared folders. Items can be moved and copied from a personal folder to a shared folder and vice versa, as long at the user has appropriate permissions.

1. Open the Favorites page by selecting **Favorites** from the main menu, the Shopping Home page, the Search Results page, or from a dashboard.

2. Select the appropriate folder from the left pane. The folder items will display in the right pane.

3. Take one of the following actions:

   - **Move a single item to another folder** by clicking on the item's **Move** link located directly under the **Add to Cart** button on the right. A pop-up window displays. Select the appropriate folder and click **Save Changes**. This action will take the item from the current folder and move it to the new one.

   - **Move multiple items to another folder** by clicking the checkbox to the far right for each item. Select Actions for Selected Favorites ▾ and select the **Move** option. A pop-up window displays. Select the appropriate folder and click **Save Changes**. This action will take the items from the current folder and move them to the new one.

   - **Copy a single item to another folder** by clicking on the item's **Copy** link located directly under the **Add to Cart** button on the right. A pop-up window displays. Select the appropriate folder and click **Save Changes**. This action will copy the item to the new folder and the item will remain in the current folder.

   - **Copy multiple items to another folder** by clicking the checkbox to the far right for each item. Select Actions for Selected Favorites ▾ and select the **Copy** option. A pop-up window displays. Select the appropriate folder and click **Save Changes**. This action will copy the items to the new folder and the items will remain in the current folder.

   - **Delete a single item from a folder** by clicking on the item's **Delete** link located directly under the **Add to Cart** button on the right.

   - **Delete multiple items from a folder** by clicking the checkbox to the far right for each item. Select Actions for Selected Favorites ▾ and select the **Delete** option.

Import or Export Shopping Favorites

Shopping Favorites can be imported and exported.

1. Open the Favorites page by selecting **Favorites** from the main menu, the Shopping Home page, the Search Results page, or from a dashboard.

2. On the left side of the page, click Import and Export ▾ . Take one of the following actions:

- **Download the Template** - Click **Download Template**. Open the template or save it to your system.

- **Export Favorites** - Click **Export** then click **Export Shared Favorites** or **Export Personal Favorites**. A pop-up window will display. Enter a description in the **Description** field and click **Submit**. You are returned to the Favorites page. The length of time it takes to export will vary based on the number of favorite items being exported. Click on the Export requested, click here to view progress. link near the top of the page to check the progress of the export. You can also view exports from **Shop > Admin > Favorites Import and Export Results**. Locate your export. If the status is set to Completed, click on the export name to download the file.

- **Import Favorites** - Once you have populated the template or made updates to an export file, you can import the items into the application. Click **Import** then click **Import Shared Favorites** or **Import Personal Favorites**. A pop-up window displays. Enter a description for the import. Click the **Browse** button to select the import file from your system. Select an Import action: **Update Folder Contents** will add the items to your folders, **Replace Folder Contents** will replace the folder contents. Click the **Submit** button to submit the import. To view your import progress, go to **Shop > Admin > Favorites Import and Export Results** and click on the **Import** tab.

Forms

Overview

Depending on your organization's setup, you may be able to purchase goods and services that are not available in the supplier catalogs. **Forms** are typically used to order goods and services that do not fit in to the catalog model, e.g., catering services, business cards, or temporary labor.

> **Note:** Requests can also be used to submit requests that do not directly involve the purchase of a good or service, such as a request for miscellaneous tasks or services. See Requests for more information.

Organizations have the ability to create multiple forms or requests for varying purposes. These are shared with shoppers who can then fill them out for purchasing. Like catalog items, forms are submitted through a shopping cart and follow an approval workflow.

Each organization creates custom **forms** based on internal needs. Some examples of forms that may be in use in your organization include:

- Services Form
- Change Order Form
- Lease Request Form
- Contract Payment Request Form
- Food Services Request
- Services Form

Form templates are created by an administrator, and forms are created from them. The fields included on a form or request support the purpose. For example, a form for ordering business cards would include fields in which to enter name, address, phone number etc. In some cases, the administrator may pre-configure a field. In the business card example, the administrator might pre-fill the address field to ensure all shoppers use a consistent address.

Forms are shared with shoppers via their Favorites.

> **Important Note:** Availability of forms depends on your organization's setup and your individual permissions. Additionally, some suppliers do not allow the purchase of items outside of their catalogs through the JAGGAER system. If you have questions about availability of these features please contact your system administrator.

Related Permissions

Permission	Description	Location
View/Use Forms	Ability to use all system forms, including Capital Expenditure, Service, and Non-Catalog Form. Does not include Non-Catalog Item.	Permission Settings > Shopping, Carts & Requisition > Shopping
Create/Edit Forms	Provides a user the ability to create a new form template based on a form type of Capital Expenditure or Service.	Permission Settings > Shopping, Carts & Requisition > Shopping

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Forms vs. Requests

Forms are used exclusively to order goods and services. Forms look and feel like paper-based forms and are filled out in a similar fashion. See the example below:

General Instructions ?

Business Card Policy

The following personnel are eligible for business cards:

- faculty
- professional staff (exempt)
- graduate assistants

Identification and Title

On business cards, individuals should be identified by the official title assigned to them upon being hired. Variations on titles are permissible at the department head's discretion and with the approval of the appropriate dean.

See here for additional information regarding business card policies.

Personal Information	?
Name	Example Value
Title	Example Value
Department	Example Value
Address	

Supplier Information	?
Supplier	Example Global Megacorp, Inc.
Currency	USD ▾

Distribution

The system will distribute purchase orders using the method(s) indicated below:

Custom Supplier Distribution selected

Page Info | Debug

Requests can be used for purchasing requests but can also be used for requests that do not directly involve the purchase of a good or service. Requests are filled out in a wizard-like interface. The request steps you through entering the data needed for the request. See the example below:

‹ Back to View Forms

Standard Procurement R...

Form Number **30442**
Purpose **Procurement Request**
Status **Incomplete**

Instructions

Details ✔

Attachments ✔

Catalog Items ✔

Review and Submit

Details   Form Request Actions ▼ | History | ?

Form Name *   Standard Procurement Request for D

Purpose   Procurement Request

Template Title   Standard Procurement Request for Desk Chairs

Form Type   Capital Expense

* Required

‹ Previous   Save Progress   Next ›

Accessing Forms

Forms are stored with your Favorites. They can be accessed by going to your Favorites but can also be accessed through the various **Form** links available in the application. Accessing forms through your Favorites will display all favorites including item favorites, whereas accessing them through the Forms link will display only forms.

1. Access forms in one of the following ways:

   - *From the main menu* - Navigate to **Shop** ⊡ **> Shopping**. The Shopping slide-out menu displays. In the **Go To** section, click **View Forms** or **View Favorites**.

   - *From the Shopping Home page* - Navigate to **Shop** ⊡ **> Shopping > Shopping Home** if the Shopping Home page is not your default home page. Locate the **Shop** widget. In the **Go To** section, click **Forms** or **Favorites**.

   - *From a dashboard* - Open the appropriate dashboard. Locate the **Shop** widget. In the **Go To** section, click **Forms** or **Favorites**. The Forms and Favorites links may also be available in a Quick Link widget on a dashboard.

   - *From the Search Results page* - The **Shop** widget is displayed at the top of the Search Results page. Similar to the Shopping Home page, click **Forms** or **Favorites** in the **Go To** section.

2. The **View Forms** or **View Favorites** page displays. Select the **Shared** or **Personal** folder to access a form from that folder.

> **Note:** If a form has been designated as the Service Item Default Form for your organization, it can be accessed by selecting the **Service Item** option in the locations listed above.

Accessing Started/Submitted Requests from the Orders Menu

In addition to using simple or advanced document search to locate requests you have begun filling out or submitted, there is a quick link available from the Orders search menu. This link quickly takes you to a search results page that includes all of your requests with a status of **Incomplete**, **Under Review**, **Approved**, **Rejected** or **Returned**.

1. Navigate to **Orders** 🕐 **> My Orders > My Procurement Requests**.

2. Search results will display all requests that you have begun to fill out or submitted. The search results can be filtered as with the standard orders search.

Completing and Submitting a Form

Forms look and feel like paper-based forms and are filled out in a similar manner.

1. Locate the appropriate form and click **View Form**. The form displays in a pop-up window.

2. Enter the form data as needed. Fields may be required or optional. Required fields are in **bold**.

3. Choose a supplier. The supplier information is managed in the **Supplier Information** section on the form. In some cases, this information is already filled out (if the forms administrator entered it when creating the form). To select a supplier, use one of the following options.

- **Enter the supplier name in the text field** - Begin typing a supplier name in the **Enter Supplier** text field. As you type the AutoComplete/Type-Ahead functionality will display matching suppliers to select from. Suppliers are ordered by best match and display with preference icons. The first eight matches are listed with a link to display all matches based on the entered criteria. Select the correct supplier. The supplier information displays. The preferred fulfillment center is selected by default, but it can be changed by clicking the **select different fulfillment center** link. In the popup window, locate the appropriate fulfillment address and click **Select**. The fulfillment address will be updated on the form.

- **Search for a supplier** - Click the **Supplier Search** link. Enter a value in the **Supplier** text box and click the **Search** button. Locate the appropriate supplier. If a supplier has more than one fulfillment center, there is an entry in the search results for each one. Click **Select** for the appropriate supplier/fulfillment center entry. The supplier information displays.

- **Enter a supplier manually** - In some cases, you may have the option to enter the supplier manually. This might be necessary if you would like to submit an order form to a supplier who is not yet registered in your site. Click the **Enter Manually** link. Fields display in which you can enter the supplier information. Required fields are in **bold**. To cancel the action click the **cancel manual entry** link. You will be returned to the original options.

4. To change the supplier information after it has been entered, click the **select different supplier** link and all supplier selection options display.

5. When you have completed filling out the form, there are several actions you can take including submitting the form to a cart, adding it to a PO revision and adding the completed form to your favorites. Locate the **Available Options** dropdown menu and select one of the following options. When you have made your selection, click .

- **Add and Go to Cart** - Adds the form to your active cart and takes you to the cart.

- **Add to Cart and Return** - Adds the form to your active cart. Instead of being taken to the cart, you remain in the form view and a new, blank form is available.

- **Add to Cart** - Adds the form to your active cart with no further action.

- **Add to Draft Cart or Pending PR/PO** - Adds the form to one of these documents. A pop-up window displays all available draft carts, PRs and POs. Click the radio button associated with the cart or document to which you would like to add the form, then select .

- **Add to PO Revision** - Adds the form to a PO revision. When you click `Go`, a search window displays. Enter search criteria and execute the search for the PO. In the search results, click the radio button associated with the PO to which you would like to add the form, then click `Add to PO`.

- **Add to Favorites** - Adds a new form to your favorites that retains all of the entered data. The new form displays the selected supplier along with the form name in favorites.

- **Save** - Saves the form retaining the data entered.

- **Add to New Cart** - Creates a new cart and adds the form to it.

Requests

Overview

Similar to forms, requests (also referred to as form requests) can be used for purchasing goods and services. They can also be used for requests that are not directly related to procurement, such as check requests and other generic requests.

Requests are filled out in a wizard-like interface that steps you through entering data for the request. The screens available or required on a request vary based on the request purpose. This topic provides a description of the screens available across all requests.

Related Permissions

Permission	Description	Location
View/Use Forms	Ability to use all system forms, including Capital Expenditure, Service, and Non-Catalog Form. Does not include non-catalog items.	Permission Settings > Shopping, Carts & Requisition > Shopping
Create/Edit Forms	Provides a user the ability to create a new form template based on a form type of Capital Expenditure or Service.	Permission Settings > Shopping, Carts & Requisition > Shopping

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Request Purposes

Requests are categorized by the purpose they are used for. There are six request purposes: **Procurement**, **Quick Quote**, **Check**, **Multi-Check**, **Credit Memo**, **Generic**.

Procurement Requests

Procurement requests are used for purchasing goods and services. The primary difference between procurement requests and the forms detailed above is that the request information is accessed and configured in a wizard-like format. In addition, you can assign multiple suppliers to a request.

Quick Quote Requests

Quick quote requests are often required by an organization when the purchase of goods or services are based on a specific business rule; when a purchase is over a specific price threshold, for example. The quick quote process involves creating a request for the goods and services that is distributed to multiple suppliers for bid. Suppliers respond with a bid and that information can be entered back in to the application.

Check Requests

Check requests are used to create accounting transactions that require a payment to be issued. They are typically used to issue refunds, payment from a clearing account or reductions of revenue. Check requests can bypass the **Add to Cart** feature. When a check request has been submitted, a non-PO invoice will be generated with the check request information attached.

Multi-Check Requests

Multi-check requests allow users to create a check request with multiple items on the same form. For example, a user who is submitting expenses for a trip could add items for car rental, hotel rental and food expenses on one multi-check request.

Credit Memo Requests

Credit memo requests are used to create credit memos that can be sent through the form request workflow for approval.

Generic Requests

Generic requests are typically sent to users to request or obtain information for miscellaneous tasks or services. Generally, these will be internal requests. For example, your organization may have a process for requesting an office move. You can create a request and send it through the approval workflow.

Overview of Request Screens

Request screens are configured in a wizard-like format, and users move through the steps in the wizard to complete a request. The list below provides a description of all the request screens, but the screens available on a request may vary based on the request purpose and its configuration.

Instructions

The **Instructions** page provides information about filling out the request. This option is not displayed if the administrator has not included instructions.

Details

The **Details** screen contains the highest level information about the template. **Note:** This section will not be displayed if the administrator has chosen to hide this section on the template.

Questions

A **Questions** menu option may display. This option is available when the forms administrator has included questions requesting additional information about the request. Questions may be required or optional. Required questions must be answered in order to submit the form. Enter data in the fields as appropriate. **Note:** If no questions were entered in the template, this menu option is not available.

Form Fields

The **Form Fields** menu option may display. This option is available when the forms administrator has included fields to gather additional information about the request. Form fields may be required or optional. Required fields must be populated in order to submit the form (required fields are indicated by ★). Enter data in the fields as appropriate. **Note**: If no form fields were entered in the template, this menu option is not available.

Attachments

Attachments can be included on a request. An administrator can include attachments when creating the template and those attachments are inherited in requests created from the template. Shoppers can also add attachments when filling out the request. This section will not be displayed if the administrator has chosen to hide this section on the template.

Suppliers (for quick quote requests)

The **Suppliers** option allows you to select the suppliers for the request. If an administrator has included suppliers on the template, they are displayed on this page. A preferred supplier may be selected by default. You can choose to keep or remove the suppliers from the list provided by the administrator and you can include additional suppliers.

Suppliers (for credit memo requests and check requests)

The **Suppliers** option allows you to select the suppliers for a request.

- Only a single supplier can be selected for credit memo and check requests.

- For check requests only, **Additional Information** and **Codes** sections are displayed in the left menu once a supplier is selected.

A preferred supplier may be selected by default. If an administrator has not included suppliers on the template, you have the option to select from your registered suppliers or to manually include ad-hoc suppliers. If an administrator has included suppliers on the template, they are displayed on this page and you can only choose from the listed suppliers.

Suppliers (for all other requests)

The **Suppliers** section allows you to select the suppliers for the request. If an administrator has included suppliers on the template, they are displayed on this page and you can only choose from the listed suppliers. If an administrator has not included suppliers on the template, you have the option to select from your registered suppliers or to manually include ad-hoc suppliers

Codes

On check requests, the **Codes** screen displays only after a supplier has been selected in the **Supplier** screen. You can assign any splittable custom fields (generally account codes) to which you have access to the check request. Your codes display by default and can be edited. The codes included are automatically applied to the invoice created from the check request.

Additional Information

On check requests, the **Additional Information** screen displays only after a supplier has been selected in the **Supplier** screen. It contains all other non-splittable invoice custom fields to which you have access. You have the option to enter information in these fields. Values entered in this screen will automatically be applied to the custom fields on the invoice.

Catalog Items

The **Catalog Items** screen contains the items associated with the form. These items are added by the forms administrator when the template is created. Shoppers cannot add, delete or edit catalog items.

Shoppers have the ability to add the form items to their favorites folders by clicking the **Add to Favorites** button.

Kits

The forms administrator may have chosen to identify the catalog items as a "Kit". If this is the case, a **Kit Quantity** field displays. Enter a number in the field to order multiple quantities of the kit item. A decimal quantity can be entered in the **Kit Quantity** field for instances when a partial order of the kit is appropriate. If a supplier that does not support decimal quantities receives a kit order with partial quantities, they will be rounded up to the nearest whole number. **Important Note:** When the quantity is changed in a form, it does not reflect on the Catalog Items screen. The quantities are only multiplied when the form is added to a cart.

Item Attribute Defaults

Item Attribute Defaults - When configuring fields with price, you can determine if the field will create a document line. Fields that are not document lines are rolled up and can be flagged with default item attributes. Forms administrators can enter data in these fields when creating the template. **Note:** The forms administrator may have chosen to hide this section in which case it will not be an option.

Quick Quote Request

The **Quick Quote Request** screen allows you to enter any important information regarding your quick quote request. This is the body of the email that will be generated and sent to suppliers that have been added to the request. To include information simply enter it in to the text box. Several formatting options are available. **Note:** This field can be configured by the forms administrator when the template is set up. When this is the case any forms created from the template will include this text and the text is not editable.

Product Line Items

The **Product Line Items** section allows you to manage the Quick Quote product items that will be sent to suppliers for evaluation. These items will be attached to the quick quote email that is sent to all suppliers that have been added to the Quick Quote Request. **Note:** The forms administrator may have chosen to hide this section in which case it will not be an option.

Service Line Items

The **Service Line Items** section allows you to manage their Quick Quote service items that will be sent to suppliers for evaluation. These items will be attached to the quick quote email that is sent to all suppliers that have been added to the Quick Quote Request. **Note:** The forms administrator may have chosen to hide this section in which case it will not be an option.

Review and Submit

The **Review and Submit** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

Accessing Requests

Requests are stored with your Favorites. They can be accessed by going to your Favorites but can also be accessed through the various **Form** links available in the application. Accessing requests through your Favorites will display all favorites including item favorites, whereas accessing them through the Forms link will display only forms.

1. Access requests in one of the following ways:

   - *From the main menu* - Navigate to **Shop** ▭ **> Shopping**. The Shopping slide-out menu displays. In the **Go To** section, click **View Forms** or **View Favorites**.

   - *From the Shopping Home page* - Navigate to **Shop** ▭ **> Shopping > Shopping Home** if the Shopping Home page is not your default home page. Locate the **Shop** widget. In the **Go To** section, click **Forms** or **Favorites**.

   - *From a dashboard* - Open the appropriate dashboard. Locate the **Shop** widget. In the **Go To** section, click **Forms** or **Favorites**. The Forms and Favorites links may also be available in a Quick Link widget on a dashboard.

   - *From the Search Results page* - The **Shop** widget is displayed at the top of the Search Results page. Similar to the Shopping Home page, click **Forms** or **Favorites** in the **Go To** section.

2. The **View Forms** or **View Favorites** page displays. Select the **Shared** or **Personal** folder to access a request from that folder.

> **Note:** If a request has been designated as the Service Item Default Form for your organization, it can be accessed by selecting the **Service Item** option in the locations listed above.

Submitting Requests

Users can submit requests for items that do not directly involve the purchase of a good or service, such as a request for miscellaneous tasks or services. Request screens are configured in a wizard-like format, and users move through the steps in the wizard to complete a request.

Submit a Procurement Request for Catalog Items

Procurement requests are used for purchasing goods and services. The primary difference between procurement requests and the other purchasing forms is that the request information is accessed and configured in a wizard-like format.

There are two types of procurement requests – catalog and non-catalog. Catalog item requests contain static items from supplier catalogs that were included on the request template by an administrator. Shoppers do not have the ability to add, delete or edit items. You simply provide any requested information and then submit the form.

Important Note: Requests that are saved but have not been submitted are assigned a status of **Incomplete**. Incomplete requests are automatically deleted after 180 days of inactivity.

How do I know if I'm working in a Procurement Request for catalog items?

The general information located in the top corner of the request indicates its purpose. You will know if it is a **catalog** item request if the **Catalog Items** screen is available in the menu options.

Procurement Request for ...	
Form Number	1139047
Purpose	Procurement Request
Status	Incomplete
Details	✔
Attachments	✔
Form Fields	✔
Catalog Items	✔
Review and Submit	

1. Access requests by selecting **Forms** or **Favorites** from the main menu, the Shopping Home page, the Search Results page, or from a dashboard.

2. Locate the appropriate request and click Submit Request ▼. The request form opens.

3. Configure the request by moving through the steps in the wizard. As you complete each step, click the **Save Progress** button to save the information and remain on the page. Click the **Next** button to save the information and move to the next step. A green check ✔ will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the ✔ by default.

Details

The **Details** screen contains the highest level information about the template. This section will not be displayed if the administrator has chosen to hide this section on the template.

Complete these fields:

- **Form Name** - The title of the request is displayed by default. Enter a different name for the request as needed.

- **Purpose** - This is a read-only field that indicates the purpose of the request.

- **Form Type** - Indicates the form type. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization.

- **Currency** (Procurement requests only) - Select a currency for the request. If the administrator has selected the currency on the template, this will be a read-only field.

Instructions

The **Instructions** page provides information about filling out the request. This option is not displayed if the administrator has not included instructions.

Attachments

Attachments can be included on a request. An administrator can include attachments when creating the template and those attachments are inherited in requests created from the template. Shoppers can also add attachments when filling out the request. This section will not be displayed if the administrator has chosen to hide this section on the template.

Note: Attachments on a Check Request form are copied to the associated invoice.

a. Click **Add Attachment**. The Add Attachment overlay opens.

b. Click the **Upload** button. The Upload overlay opens.

c. Enter a **title** for the attachment (required).

d. Click **Choose File**, then browse to and select the file on your local system.

e. Click **Save Changes**.

f. Repeat the steps above for additional attachments.

Form Fields

The **Form Fields** menu option may display. This option is available when the forms administrator has included fields requesting additional information about the request. Form fields may be required or optional. Required fields must be populated in order to submit the form (required fields are indicated by ★). Enter data in the fields as appropriate. **Note**: If no form fields were entered in the template, this menu option is not available.

Catalog Items

The **Catalog Items** screen contains the items associated with the form. These items are added by the forms administrator when the template is created. Shoppers cannot add, delete or edit catalog items.

Shoppers have the ability to add the form items to their favorites folders by clicking the **Add to Favorites** button.

Kits

The forms administrator may have chosen to identify the catalog items as a "Kit". If this is the case, a **Kit Quantity** field displays. Enter a number in the field to order multiple quantities of the kit item. A decimal quantity can be entered in the **Kit Quantity** field for instances when a partial order of the kit is appropriate. If a supplier that does not support decimal quantities receives a kit order with partial quantities, they will be rounded up to the nearest whole number. **Important Note:** When the quantity is changed in a form, it does not reflect on the Catalog Items screen. The quantities are only multiplied when the form is added to a cart.

Review and Submit

The **Review and Submit** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

4. There are several options for submitting the request. Click the drop-down arrow on **Add and go to Cart** and select an option. **Note:** If you manually entered a supplier, you will be prompted to enter additional information before a form can be added to a cart or document.

   - **Add and go to Cart** - Adds the request to the active cart and takes you to the cart.

   - **Add to Cart and Return** - Adds the request to your active cart. You remain on the request which is now ready to be configured again.

   - **Save to Cart and Add Another** - Adds the request to the cart, then you are directed to the first page of the request and the recently saved values are still displayed. If you change the values on the request and resubmit it, another procurement request is added to the cart with the new values. This option lets you submit multiple

requests that use similar information but have minor changes, for example, if you need to submit multiple orders for business cards and only the name and title changes on each one.

- **Add to a new Cart** - Creates a new cart with the request and takes you to the cart.

- **Add to Draft Cart or Pending PR/PO** - Adds the request to one of these documents. A pop-up window displays all available draft carts, PRs and POs. Click the radio button associated with the cart or document to which you would like to add the request, then select **Add to Draft Cart or Pending Requisition/PO** .

- **Add to PO Revision** - Adds the request to a PO revision. Click the option and the search window displays. Enter search criteria and execute the search. In the search results, click the radio button associated with the PO to which you would like to add the request, then click **Add to PO** .

Submit a Procurement Request for Non-Catalog Items

Procurement requests are used for purchasing goods and services. The primary difference between procurement requests and the other purchasing forms is that the request information is accessed and configured in a wizard-like format.

There are two types of procurement requests – catalog and non-catalog. Non-catalog procurement requests allow an administrator to define the items in the request without selecting them from a supplier catalog. The administrator can leave much of the information included in the request up to the shopper to enter.

Important Note: Requests that are saved but have not been submitted are assigned a status of **Incomplete**. Incomplete requests are automatically deleted after 180 days of inactivity.

How do I know if I'm working in a Procurement Request for non-catalog items?

The general information located in the top corner of the request indicates its purpose. You will know if it is a **non-catalog** item request if the **Suppliers** and **Item Attribute Defaults** screens are available in the menu options.

1. Access requests by selecting **Forms** or **Favorites** from the main menu, the Shopping Home page, the Search Results page, or from a dashboard.

2. Locate the appropriate request and click ![Submit Request]. The request form opens.

3. Configure the request by moving through the steps in the wizard. As you complete each step, click the **Save Progress** button to save the information and remain on the page. Click the **Next** button to save the information and move to the next step. A green check will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the green check by default. The screens listed below may be available on the request. For additional information and detailed instructions for filling out each screen, please see .

Instructions

The **Instructions** page provides information about filling out the request. This option is not displayed if the administrator has not included instructions.

Details

The **Details** screen contains the highest level information about the template. This section will not be displayed if the administrator has chosen to hide this section on the template.

Complete these fields:

- **Form Name** - The title of the request is displayed by default. Enter a different name for the request as needed.

- **Purpose** - This is a read-only field that indicates the purpose of the request.

- **Form Type** - Indicates the form type. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization.

- **Currency** (Procurement requests only) - Select a currency for the request. If the administrator has selected the currency on the template, this will be a read-only field.

Attachments

Attachments can be added to a request template and those attachments are inherited by requests created from the template. Shoppers can also add attachments when filling out the request. You can choose to hide the Attachments section, in which case it will not be an option on requests.

Note: Attachments on a Check Request form are copied to the associated invoice.

Add attachments to the request template

a. Click **Add Attachment**. The Add Attachment overlay opens.

b. Click the **Upload** button. The Upload overlay opens.

c. Enter a **title** for the attachment (required).

d. Click **Choose File**, then browse to and select the file to upload.

e. Click **Save Changes**.

f. Repeat the steps above for additional attachments.

Hide the Attachments section

a. Click the **Hidden Section** checkbox to hide the Attachments section from end users who are completing requests created from the template.

Suppliers

The **Suppliers** option allows you to select the suppliers for a request. If an administrator has included suppliers on the template, they are displayed on this page and you can only choose from the listed suppliers. If an administrator has not included suppliers on the

template, you have the option to select from your registered suppliers or to manually include ad-hoc suppliers.

    a. Click **Suppliers** in the left menu.

    b. *If suppliers have been added to the template:*

        i. The suppliers selected by the administrator are displayed on the **Template Suppliers** tab. ✔ **Selected** appears next to a supplier if one has been selected by default.

        ii. To select or change a supplier, click the **Select** button next to the appropriate supplier.

    c. *If there are no suppliers on the template:*

        i. Click the **Add Suppliers to Template** tab if you are not on it.

        ii. Add a supplier using one of the following methods:

            • **Search Registered Suppliers** - Enter search criteria in the fields. To search by commodity code, click the ✎ button to the right of the Commodity Code field and select one or more of the available codes. When you have entered all the search criteria, click Q Search . The search results display. Click Select for the appropriate supplier.

            • **Manually Add a Supplier** - Click the **Manually Add Suppliers** button. Enter supplier information in the overlay and select a distribution method (required). Click **Save**, or **Save and Add Another** to save the supplier and immediately add another supplier.

        iii. The supplier displays at the top of the screen. You can change the supplier by clicking on a different supplier in the search results or manually adding a supplier.

Item Attribute Defaults

Item Attribute Defaults - When configuring fields with price, you can determine if the field will create a document line. Fields that are not document lines are rolled up and can be flagged with default item attributes. Forms administrators can enter data in these fields when creating the template. **Note:** The forms administrator may have chosen to hide this section in which case it will not be an option.

Form Fields

The **Form Fields** menu option may display. This option is available when the forms administrator has included fields requesting additional information about the request. Form fields may be required or optional. Required fields must be populated in order to submit the form (required fields are indicated by ★). Enter data in the fields as appropriate. **Note**: If no form fields were entered in the template, this menu option is not available.

Review and Submit

The **Review and Submit** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

4. There are several options for submitting the request. Click the drop-down arrow on **Add and go to Cart** and select an option. **Note:** If you manually entered a supplier, you will be prompted to enter additional information before a form can be added to a cart or document.

   - **Add and go to Cart** - Adds the request to the active cart and takes you to the cart.

   - **Add to Cart and Return** - Adds the request to your active cart. You remain on the request which is now ready to be configured again.

   - **Save to Cart and Add Another** - Adds the request to the cart, then you are directed to the first page of the request and the recently saved values are still displayed. If you change the values on the request and resubmit it, another procurement request is added to the cart with the new values. This option lets you submit multiple requests that use similar information but have minor changes, for example, if you need to submit multiple orders for business cards and only the name and title changes on each one.

   - **Add to a new Cart** - Creates a new cart with the request and takes you to the cart.

   - **Add to Draft Cart or Pending PR/PO** - Adds the request to one of these documents. A pop-up window displays all available draft carts, PRs and POs. Click the radio button associated with the cart or document to which you would like to add the request, then select [Add to Draft Cart or Pending Requisition/PO].

   - **Add to PO Revision** - Adds the request to a PO revision. Click the option and the search window displays. Enter search criteria and execute the search. In the search results, click the radio button associated with the PO to which you would like to add the request, then click [Add to PO].

Submit a Check Request

Check requests are used to create accounting transactions that require a payment to be issued. They are typically used to issue refunds, payment from a clearing account or reductions of revenue. Check requests can bypass the **Add to Cart** feature. When a check request has been submitted, a non-PO invoice will be generated with the check request information attached.

Important Note: Requests that are saved but have not been submitted are assigned a status of **Incomplete**. Incomplete requests are automatically deleted after 180 days of inactivity.

How do I know if I'm working in a Check Request?

The general information located in the top corner of the request indicates its purpose.

Check Request

Form Number	1138982
Purpose	Check Request
Status	Incomplete

1. Access requests by selecting **Forms** or **Favorites** from the main menu, the Shopping Home page, the Search Results page, or from a dashboard.

2. Locate the appropriate request and click Submit Request ▼. The request form opens.

3. Configure the request by moving through the steps in the wizard. As you complete each step, click the **Save Progress** button to save the information and remain on the page. Click the **Next** button to save the information and move to the next step. A green check will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the green check by default. The screens listed below may be available on the request. For additional information and detailed instructions for filling out each screen, please see .

Instructions

The **Instructions** page provides information about filling out the request. This option is not displayed if the administrator has not included instructions.

Details

The **Details** screen contains the highest level information about the template. This section will not be displayed if the administrator has chosen to hide this section on the template.

Complete these fields:

- **Form Name** - The title of the request is displayed by default. Enter a different name for the request as needed.

- **Purpose** - This is a read-only field that indicates the purpose of the request.

- **Form Type** - Indicates the form type. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization.

- **Currency** (Procurement requests only) - Select a currency for the request. If the administrator has selected the currency on the template, this will be a read-only field.

Attachments

Attachments can be included on a request. An administrator can include attachments when creating the template and those attachments are inherited in requests created from the template. Shoppers can also add attachments when filling out the request. This section will not be displayed if the administrator has chosen to hide this section on the template.

Note: Attachments on a Check Request form are copied to the associated invoice.

a. Click **Add Attachment**. The Add Attachment overlay opens.

b. Click the **Upload** button. The Upload overlay opens.

c. Enter a **title** for the attachment (required).

d. Click **Choose File**, then browse to and select the file on your local system.

e. Click **Save Changes**.

f. Repeat the steps above for additional attachments.

Questions

A **Questions** menu option may display. This option is available when the forms administrator has included questions requesting additional information about the request. Questions may be required or optional. Required questions must be answered in order to submit the form. Enter data in the fields as appropriate. **Note:** If no questions were entered in the template, this menu option is not available.

Review and Submit

The **Review and Submit** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

Submit a Multi-Check Request

Multi-check requests are a type of check request that allow users to create one check request with multiple items on the same request. For example, a user who is submitting expenses for a trip can add items for car rental, hotel rental and food expenses to one multi-check request. There is no limit to the number of additional items that can be added to a multi-check request.

Multi-check requests are similar to check requests with these differences:
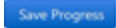
- Multi-check requests are identified by **Multi-Check Request** listed as the request **Purpose**.

- Multiple forms are added to a multi-check request by selecting the **Save and Add Another** option on the Review and Submit page. The completed form is saved and the user is returned to the first step of the wizard with a new, blank form and editable fields.

- All forms that are added to a multi-check request are tied to one form number.

- When a Multi-Check Request has been submitted, the system will create a separate invoice for each form on a multi-check request with the multi-check request information attached. The invoice number is displayed in the sticker area of each form near the top left corner of the page.

Important Note: Requests that are saved but have not been submitted are assigned a status of **Incomplete**. Incomplete requests are automatically deleted after 180 days of inactivity.

How do I know if I'm working in a Multi-Check Request?

The general information located in the top corner of the request indicates the request purpose.

1. Access requests by selecting **Forms** or **Favorites** from the main menu, the Shopping Home page, the Search Results page, or from a dashboard.

2. Locate the appropriate request and click Submit Request ▼. The request form opens.

3. Configure the request by moving through the steps in the wizard. As you complete each step, click the Save Progress button to save the information and remain on the page. Click the Next > button to save the information and move to the next step. A green check ✔ will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the ✔ by default. The screens listed below may be available on the form. For additional information and detailed instructions for filling out each screen, please see .

Instructions

The **Instructions** page provides information about filling out the request. This option is not displayed if the administrator has not included instructions.

Details

The **Details** screen contains the highest level information about the template. This section will not be displayed if the administrator has chosen to hide this section on the template.

Complete these fields:

- **Form Name** - The title of the request is displayed by default. Enter a different name for the request as needed.

- **Purpose** - This is a read-only field that indicates the purpose of the request.

- **Form Type** - Indicates the form type. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization.

- **Currency** (Procurement requests only) - Select a currency for the request. If the administrator has selected the currency on the template, this will be a read-only field.

Supplier

The supplier for the request is chosen in this section. Only one supplier can be selected on a multi-check request.

Questions

Questions - This page displays questions that must be completed by the supplier and any questions that the forms administrator has included to gather additional information about the request.

> **Note:** In the **Supplier Invoice Number** field on the **Questions** page, users can enter a different supplier invoice number on each form added to the request. The field may or not be required, based on the template settings. If the field is not required, you can leave this field blank.

Attachments

Attachments can be included on a request. An administrator can include attachments when creating the template and those attachments are inherited in requests created from the template. Shoppers can also add attachments when filling out the request. This section will not be displayed if the administrator has chosen to hide this section on the template.

Note: Attachments on a Check Request form are copied to the associated invoice.

a. Click **Add Attachment**. The Add Attachment overlay opens.

b. Click the **Upload** button. The Upload overlay opens.

c. Enter a **title** for the attachment (required).

d. Click **Choose File**, then browse to and select the file on your local system.

e. Click **Save Changes**.

f. Repeat the steps above for additional attachments.

Check Requests

This section shows each form that has been added to the request. They are listed in the order in which they were added. Columns show each item's **Description** and **Amount**. Click the **Edit** button next to each item to change individual forms. The form opens in a new window, where content can be changed and saved while the request is in Incomplete or Pending status. The last form that was added is in bold and does not have an **Edit** button, because it is open. Once the multi-check request has completed the approval workflow, the save buttons are not displayed and the **Edit** button changes to "View".

> **Note:** Selecting **Discard Request** from Request Actions will discard only the form being edited at the time. The forms already saved will be retained. If there is only one form, it can be discarded and the entire multi-check request will be deleted. The Discard option is only displayed if the request is in Incomplete status. It is displayed in the **Edit** window for each child form, but not on the parent form.

Review and Submit

This section provides a summary of which sections are complete. The **Submit** button has two options:

- **Save and Add Another** is the second option in the drop down under Submit. If selected, the completed form is saved and you are returned to the first step of the wizard with a new, blank form and editable fields. Each addition will add a new form to the request under the same form number.

- **Submit** sends the multi-check request into the approval workflow. Once a multi-check request is submitted into the approval workflow, fields on the forms are still editable. If field values on forms are changed while the multi-check request is in workflow, the updated values will be copied over to the invoice.

Form Approvals

This section displays where the document is in the Form Approval workflow and shows the approvers for each step.

Submit a Credit Memo Request
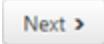
Credit memo requests are used to create credit memos that can be sent through the form request workflow for approval. In order to submit a credit memo request a user needs to provide, at a minimum, the supplier name, supplier invoice number and amount of the credit being issued.

Important Note: Requests that are saved but have not been submitted are assigned a status of **Incomplete**. Incomplete requests are automatically deleted after 180 days of inactivity.

How do I know if I'm working in a Credit Memo Request?

The general information located in the top corner of the request indicates the purpose.

Credit Memo Request

Form Number	1138964
Purpose	Credit Memo Request
Status	Incomplete

1. Access requests by selecting **Forms** or **Favorites** from the main menu, the Shopping Home page, the Search Results page, or from a dashboard.

2. Locate the appropriate request and click [Submit Request ▼]. The request form opens.

3. Configure the request by moving through the steps in the wizard. As you complete each step, click the [Save Progress] button to save the information and remain on the page. Click the [Next >] button to save the information and move to the next step. A green check ✔ will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the ✔ by default. The screens listed below may be available on the form. For additional information and detailed instructions for filling out each screen, please see .

Instructions

The **Instructions** page provides information about filling out the request. This option is not displayed if the administrator has not included instructions.

Details

The **Details** screen contains the highest level information about the template. This section will not be displayed if the administrator has chosen to hide this section on the template.

Complete these fields:

- **Form Name** - The title of the request is displayed by default. Enter a different name for the request as needed.

- **Purpose** - This is a read-only field that indicates the purpose of the request.

- **Form Type** - Indicates the form type. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization.

- **Currency** (Procurement requests only) - Select a currency for the request. If the administrator has selected the currency on the template, this will be a read-only field.

Attachments

Attachments can be included on a request. An administrator can include attachments when creating the template and those attachments are inherited in requests created from the template. Shoppers can also add attachments when filling out the request. This section will not be displayed if the administrator has chosen to hide this section on the template.

Note: Attachments on a Check Request form are copied to the associated invoice.

a. Click **Add Attachment**. The Add Attachment overlay opens.

b. Click the **Upload** button. The Upload overlay opens.

c. Enter a **title** for the attachment (required).

d. Click **Choose File**, then browse to and select the file on your local system.

e. Click **Save Changes**.

f. Repeat the steps above for additional attachments.

Questions

A **Questions** menu option may display. This option is available when the forms administrator has included questions requesting additional information about the request. Questions may be required or optional. Required questions must be answered in order to submit the form. Enter data in the fields as appropriate. **Note:** If no questions were entered in the template, this menu option is not available.

Review and Submit

The **Review and Submit** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

Submit a Generic Request
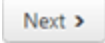
Generic requests are typically sent to users to request or obtain information for miscellaneous tasks or services. Generally, these will be internal requests.

Important Note: Requests that are saved but have not been submitted are assigned a status of **Incomplete**. Incomplete requests are automatically deleted after 180 days of inactivity.

How do I know if I'm working in a Generic Request?

The general information located in the top-right of the request indicates its purpose.

Generic Request	
Form Number	1139062
Purpose	Generic Request
Status	Incomplete

1. Access requests by selecting **Forms** or **Favorites** from the main menu, the Shopping Home page, the Search Results page, or from a dashboard.

2. Locate the appropriate request and click [Submit Request ▼]. The request form opens.

3. Configure the request by moving through the steps in the wizard. As you complete each step, click the [Save Progress] button to save the information and remain on the page. Click the [Next >] button to save the information and move to the next step. A green check ✔ will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the ✔ by default. The screens listed below may be available on the request. For additional information and detailed instructions for filling out each screen, please see

Instructions

The **Instructions** page provides information about filling out the request. This option is not displayed if the administrator has not included instructions.

Details

The **Details** screen contains the highest level information about the template. This section will not be displayed if the administrator has chosen to hide this section on the template.

Complete these fields:

- **Form Name** - The title of the request is displayed by default. Enter a different name for the request as needed.

- **Purpose** - This is a read-only field that indicates the purpose of the request.

- **Form Type** - Indicates the form type. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization.

- **Currency** (Procurement requests only) - Select a currency for the request. If the administrator has selected the currency on the template, this will be a read-only field.

Attachments

Attachments can be included on a request. An administrator can include attachments when creating the template and those attachments are inherited in requests created from the template. Shoppers can also add attachments when filling out the request. This section will not be displayed if the administrator has chosen to hide this section on the template.

Note: Attachments on a Check Request form are copied to the associated invoice.

a. Click **Add Attachment**. The Add Attachment overlay opens.

b. Click the **Upload** button. The Upload overlay opens.

c. Enter a **title** for the attachment (required).

d. Click **Choose File**, then browse to and select the file on your local system.

e. Click **Save Changes**.

f. Repeat the steps above for additional attachments.

Questions

A **Questions** menu option may display. This option is available when the forms administrator has included questions requesting additional information about the request. Questions may be required or optional. Required questions must be answered in order to submit the form. Enter data in the fields as appropriate. **Note:** If no questions were entered in the template, this menu option is not available.

Review and Submit

The **Review and Submit** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

Submit a Quick Quote Request

Quick quotes are often required by an organization when the purchase of goods or services are based on a specific business rule; when a purchase is over a specific price threshold, for example. The quick quote process involves creating a request for the goods and services that is distributed to multiple suppliers for bid. Suppliers respond with a bid and that information can be entered back in to the application.

Important Note: Requests that are saved but have not been submitted are assigned a status of **Incomplete**. Incomplete requests are automatically deleted after 180 days of inactivity.

How do I know if I'm working in a Quick Quote Request?

The general information located in the top-right of the request indicates its purpose.

1. Access requests by selecting **Forms** or **Favorites** from the main menu, the Shopping Home page, the Search Results page, or from a dashboard.

2. Locate the appropriate request and click [Submit Request ▼]. The request form opens.

3. Configure the request by moving through the steps in the wizard. As you complete each step, click the [Save Progress] button to save the information and remain on the page. Click the [Next >] button to save the information and move to the next step. A green check ✔ will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the ✔ by default. The screens listed below may be available on the request. For additional information and detailed instructions for filling out each screen, please see .

Instructions

The **Instructions** page provides information about filling out the request. This option is not displayed if the administrator has not included instructions.

Details

The **Details** screen contains the highest level information about the template. This section will not be displayed if the administrator has chosen to hide this section on the template.

Complete these fields:

- **Form Name** - The title of the request is displayed by default. Enter a different name for the request as needed.

- **Purpose** - This is a read-only field that indicates the purpose of the request.

- **Form Type** - Indicates the form type. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization.

- **Currency** (Procurement requests only) - Select a currency for the request. If the administrator has selected the currency on the template, this will be a read-only field.

Quick Quote Requests

The **Quick Quote Request** screen allows the user to enter any important information regarding their quick quote request. This is the body of the email that will be generated and sent to suppliers that have been added to the request. To include information simply enter it in to the text box. Several formatting options are available. **Note:** This field can be configured by the forms administrator when the template is set up. When this is the case any forms created from the template will include this text. The shopper is not able to edit the text.

Attachments

Attachments can be included on a request. An administrator can include attachments when creating the template and those attachments are inherited in requests created from the template. Shoppers can also add attachments when filling out the request. This section will not be displayed if the administrator has chosen to hide this section on the template.

Note: Attachments on a Check Request form are copied to the associated invoice.

a. Click **Add Attachment**. The Add Attachment overlay opens.

b. Click the **Upload** button. The Upload overlay opens.

c. Enter a **title** for the attachment (required).

d. Click **Choose File**, then browse to and select the file on your local system.

e. Click **Save Changes**.

f. Repeat the steps above for additional attachments.

Questions

The **Quick Quote Request** screen allows the user to enter any important information regarding their quick quote request. This is the body of the email that will be generated and sent to suppliers that have been added to the request. To include information simply enter it in to the text box. Several formatting options are available. **Note:** This field can be configured by the forms administrator when the template is set up. When this is the case any forms created from the template will include this text. The shopper is not able to edit the text.

Product Line Items

The **Product Line Items** section allows you to manage the Quick Quote product items that will be sent to suppliers for evaluation. These items will be attached to the quick quote email that is sent to all suppliers that have been added to the Quick Quote Request. **Note:** The forms administrator may have chosen to hide this section in which case it will not be an option.

Service Line Items

The **Service Line Items** section allows you to manage their Quick Quote service items that will be sent to suppliers for evaluation. These items will be attached to the quick quote email that is sent to all suppliers that have been added to the Quick Quote Request. **Note:** The forms administrator may have chosen to hide this section in which case it will not be an option.

Review and Submit

The **Review and Submit** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress**

column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

Submit

Click **Submit**. **Important Note:** To complete the quick quote request you must receive and enter the supplier quotes into the request. See Entering Supplier Quotes in to a Quick Quote Request Form and Creating a Cart for additional information:

- Once a Quick Quote request has been submitted, an **Enter Quote** section becomes available on the request. Within the section, there is an area to enter a quote for each supplier to which the request was sent. Suppliers send quotes via normal the normal method (fax, email, etc.) and you will need to enter them in the Enter Quote section.

- You can create a cart directly from the Enter Quotes section for the supplier who is "awarded" the business by clicking the **Create Cart** button for the associated supplier.

Entering Supplier Quotes into a Quick Quote Request and Creating a Cart

When a quick quote request is submitted (and has gone through any workflow steps), an email is sent to the included suppliers. The message contains the items or services being requested along with any additional information designated to be sent to the supplier on the request. Suppliers send quotes via the normal method (fax, email, etc.) and that information is entered manually by the request submitter.

A submitted form will have the Enter Quote screen available in the left-navigation menu. Use the following steps to enter quote information and create a cart.

1. Go to **Orders** 🔲 **> Search > Procurement Requests**. Locate and open the request in one of the following ways:

    - Click the **Add Filter** button. Select **Form Purpose**, then **Quick Quote Request**, then click **Apply**. Your forms display. Locate the appropriate form and click the **Form Name** to open it.

    - Click **My Requests** in the left sidebar and apply the filters above if needed.

2. Click on the **Enter Quotes** option in the left navigation.

3. Locate the appropriate supplier and enter the quote. Do this for each supplier who provides a quote. **Note:** If your organization uses multiple currencies, you will have the option to select a different currency from the base (default) currency in the **Currency** field associated with each supplier. The supplier must be configured to accept the currency.

4. When you are ready to select a supplier, click associated with the supplier.

5. Confirm that you would like to finalize the pricing by selecting **Yes**. If you have selected a registered supplier you will be taken to the cart immediately. If you have selected a supplier that was manually entered on the request, you will be prompted to enter additional information about the supplier before you are taken to the cart.

Request Export

You can export a document search for reporting and analysis purposes. Exports can be performed directly from the document search results or from a saved search.

For Quick Quote, Generic, Procurement and Budget Transfer types of form request exports, you can choose between Screen Layout and Full Export types of exports. When the **Full Export** option is selected, additional data is broken down into separate CSV files:

- **RequestData** - General data, including the Current Workflow Step and Workflow Assignee.

- **ApprovalHistory** - Workflow data. This is a workflow file which shows approved or rejected requests. If a request is currently in workflow, it will not appear as a row in this file until it has been either approved or rejected.

- **Questions** - Contains form questions and answers. **Note:** This does not include questions or answers that have a file upload.

When performing an export for Quick Quote, Generic, Procurement or Budget Transfer form requests, you can choose between "Screen Layout" and "Full Export" options, as follows:

1. Navigate to **Orders** **> Search> Procurement Requests**.

2. Click the **Export All** button and choose to export all the records in the search results or only selected rows.

3. The **Type** field determines the format of the exported file. Select one of the following options:

    - **Screen Layout** - Produces an Excel-formatted document.

    - **Full Export** - Produces a CSV-formatted document which contains additional data for workflow, approval history, and questions.

4. Click **Submit**. Users are returned to the Search Procurement Requests screen.

5. Wait to complete the export and then click the **Export** button a second time and select navigate to **Manage Search Export**. The saved export file can be found and downloaded.

Non-Catalog Items

Overview

Non-catalog purchasing allows shoppers to quickly add items to the shopping cart that are not found in the catalogs. You can quickly and easily add non-catalog items to your cart. Non-catalog items should be entered when a requisitioner cannot find the item needed from hosted or punch-out catalogs. Entering non-catalog items is also required when items are very new to the market and/or have not been added to available catalogs.

The **non-catalog item entry screen** is an overlay "popup" that can be accessed from many different places in the application. The screen is easy-to-use and allows for quick entry of non-catalog items.

> **Note:** Your organization may not allow non-catalog item ordering. If non-catalog shopping is not permitted the option will not be available. Please contact your System Administrator if you are unsure if non-catalog ordering is available.

> **Important Note:** Forms that are saved but have not been submitted are assigned a status of **Incomplete**. Incomplete forms are automatically deleted after 180 days of inactivity.

Related Permissions

The following permissions are related to non-catalog ordering. Depending on the organization's configuration, users may have any of the following:

Permission	Description	Location
View/Use Non-Catalog Item	The **View/Use Forms** permission is required if the organization is configured to use the Non-Catalog Form entry.	Permission Settings > Shopping, Carts & Requisitions > Shopping
Bypass Non-Catalog Search	If enabled, the user is not required to search for a hosted catalog item prior to entering a non-catalog request. If not enabled, the user must first conduct a search.	Permission Settings > Shopping, Carts & Requisitions > Shopping

Permission	Description	Location
Add Lines to Pending Purchase Orders	This permission allows a user to add an item to an existing purchase order in workflow. This includes non-catalog item entry.	Permission Settings > Approvals > Purchase Order Approvals

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Purchase Non-Catalog Items

> **Important Note:** Before you purchase an item through non-catalog ordering, be sure that the item is not available in a hosted or punch out catalog. If it is, it is suggested that you order it through the catalog.

1. Access the non-catalog item ordering feature in one of the following ways:

    - *From the main menu* - Navigate to **Shop 🖳 > Shopping**. The Shopping slide-out menu displays. In the **Go To** section, click **Non-Catalog Item**.

    - *From the Shopping Home page* - Navigate to **Shop 🖳 > Shopping > Shopping Home** if the Shopping Home page is not your default home page. Locate the **Shop** widget. In the **Go To:** section, click **Non-Catalog Item**.

    - *From a dashboard* - Open the appropriate dashboard. Locate the **Shop** widget. In the **Go To:** section, click **Non-Catalog Item**. The Non-Catalog Item link may also be available in the Quick Link widget on a dashboard.

2. The **Non-Catalog Item** overlay window looks similar to the one shown below. Follow the steps below to enter one or more items to your cart. **Note:** The steps below may vary by organization. Some sites and users are set up to bypass the SKU search, while it is required for others. The steps below assume the **Bypass the SKU search** permission is enabled. Additionally, it is assumed that the permissions to add a new supplier is off, so only the selection from existing suppliers is permitted.

a. Choose a method of adding a supplier by clicking one of the tabs at the top of the window:

- **Existing Supplier** (default) - Select this option if you know the supplier. In the Select Supplier field below, you can enter the supplier name or information and as you begin typing the type-ahead functionality will display matching suppliers, or you can click the search icon to search for and select a supplier. When the supplier is selected, the preferred fulfillment center is selected by default, but it can be changed by clicking the arrow next to **Fulfillment Address** and selecting the appropriate address.

- **Manual Supplier** - Select this option to enter supplier information manually and complete the additional fields that are displayed, i.e., Supplier Name, Supplier Phone, etc.

- **Supplier Not Known** - Select this option if you do not know the supplier for the item you need.

b. Fill in all required fields: Description, Catalog No, Size, Quantity, Price, and Packaging information.

c. *(Optional)* In the **Additional details** section, enter additional information for the item if needed.

> **Note:** If the AI-based JAGGAER Advise solution to facilitate the selection of commodity codes on PR and PO lines has been enabled for your organization, users are prompted with commodity code recommendations based on the item description and historical PO/PR line code assignments for similar items. See "The Checkout Process - Submitting Requisitions" on page 196 for more information.

d. After entering the item information:

- If you only want to order one item from the supplier, click **Save**.

- If you want to order multiple items from the supplier or another supplier, click **Save And Add Another**. The screen will empty except for the supplier, which can be modified if needed.

- Click **Close** if you want to exit the Add Non-Catalog Item window.

- The item(s) that were added can be viewed from the shopping cart. To edit the non-catalog item once added to the cart, simply click on its name in the cart and the popup will display.

Contract Items

Overview

Your organization most likely has contracts with various vendors and suppliers. The JAGGAER application can store contract information, giving organizations the ability to track purchases made against the contracts. The concepts and tasks below focus on locating and identifying contract items for purchasing. The tasks are performed by end users and buyers with the appropriate contract viewing and usage access.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Locating a Contract and Contract Items

The Contract Compliance Tracking feature is designed to allow all types of users to have the appropriate access to contracts. Contracts can be set up so that all users can see the details of the contract, or in such a way that users have limited or no visibility.

Users can view contracts four different ways:

1. **From Product Search** - When a shopper or requisitioner performs a search for an item or service that "matches" a contract, a link to the contract displays in the search results. The user does not necessarily know they are "looking for" a contract, but you are able to guide them to select the correct supplier/item. For more information, refer to the Contract Items and Forms in Product Search section below.

2. **From the Shopping Home page or dashboard** - The **Browse > Contracts** option on the Shopping Home page or a dashboard allows users to browse contracts to see what contracts are available. This task is oftentimes performed to find out whether or not the user should be using a specific contract/vendor for a type of purchase. For example, although you might not know the name of the contract or vendor for catering services, you could do a search for a catering contract and locate the appropriate contract. You will be taken to the **Search Contracts** page where you can enter values in the search fields to search for contracts. After searching, click on any of the contract numbers to view more details about the contract. Depending on your visibility privileges you may have full or partial viewing access. If you are a contract manager or contract owner assigned to the contract, you may be able to edit the contract, review, and update contracts.

3. **From the Contracts Home page** - Navigating to **Contracts** ⊕ **> Contracts > Contracts Home** will take you directly to a listing of current contracts. From there, you can search for, review, and update contracts (if you are a contract manager/owner).

4. **From the Supplier Info pop up window** - This window can be accessed from many places in the application by clicking on the highlighted/bold Supplier Name. From the pop-up, click on the **Contracts** tab to view the contracts for the supplier. Only contracts that you (the user) have access to are displayed. The Supplier pop-up can be accessed from the cart, from the product search results, by browsing by Supplier, and a number of other locations in the system.
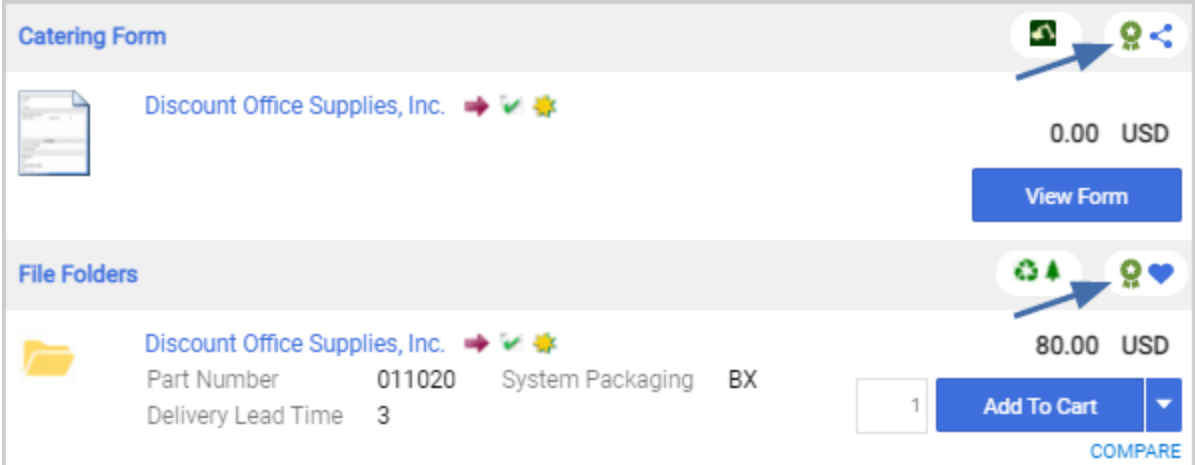
Contract Items and Forms in Product Search

Shoppers and requisitioners oftentimes do not know which contract they should use when purchasing goods or services, they simply know what they want to order. By allowing forms and items from contracts to display in the Product Search results, the user is quickly and easily directed to what contract they should use with their purchase. Additionally, the contract spend is automatically tracked when the item is requested.

Important: In order for forms or items from a contract to display in Product Search results or via the Purchasing Showcase, the contract or contract type must be associated with a form or non-catalog item, keywords entered for the contract/supplier, or the contract must provide ordering information.

This task demonstrates how a user can select an item or a form from a contract through the Product Search results.

1. Find items or forms associated with a contract in the search results in one of the following ways.

   - *If you know the contract number* - Navigate to **Shop** ⬛ **> Shopping > Shopping Home**. Enter the **exact contract number** in the search field and initiate the search. All items and forms associated with the contract are listed in the search results.

   - *If you know the name of the form or item* - Enter search criteria in the search field and initiate the search.

   - *Browse contracts* - You can browse contracts to see what contracts are available. See Browse Products by Contract for more information.

2. If items or forms on a contract match the criteria entered, they will be displayed in the search results. A contract icon 🏅 next to an item or form in the search results indicates that it is associated with a contract. Hover over the icon to see the contract number and name. Click the icon to view additional details about the contract.

3. From a contract line item, you have a few options:

- **View additional contract information**

   The **contract icon** provides additional **contract** information. Hover over the icon to see the contract number and name. Click the icon to view a summary of contract information. Based on your visibility permissions, you may see more or less information than shown here. From this screen, users with the appropriate contract permissions can navigate to the contract.

- **Add an item to your cart** - Select a quantity and click **Add to Cart**.

- **Complete a form and add it to your cart** - Click **View Form** or click the **Form Name** to go directly to the form. If the supplier is not predefined in the form, it will be populated once selected so that the correct supplier and contract is used. Complete the form and add it to your cart. After adding a line item from a form to your cart, the associated contract will be listed.

Note: If a purchase happens outside of the JAGGAER application, a manual adjustment can be made during the settlement process.
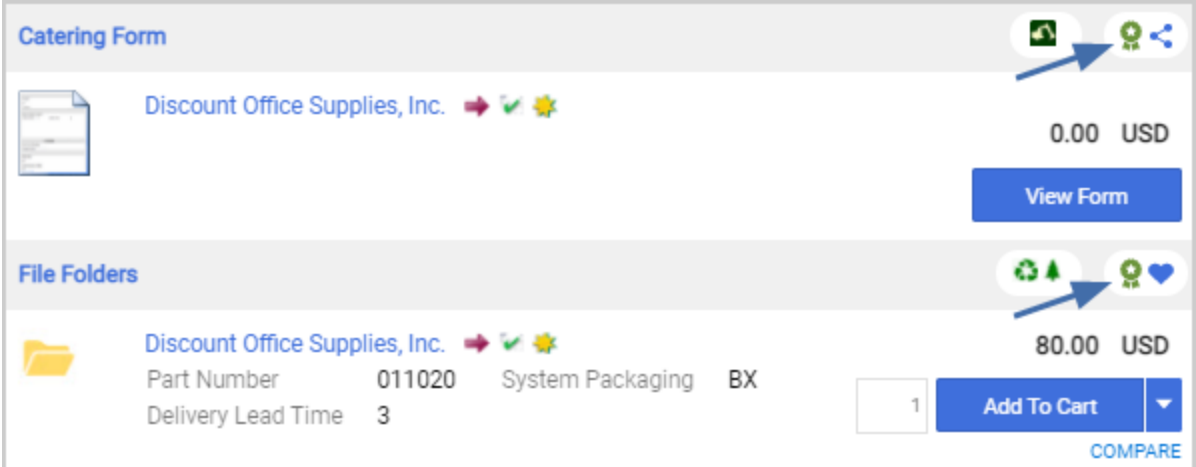
View Contracts Associated with a Form

If a form is associated with a contract, the form can display in search results. These instructions show how to select a form that is associated with a contract through the Product Search results.

Important: In order for forms associated with contracts to display in Product Search results or via the Purchasing Showcase, the contract or contract type must be associated with a form, keywords entered for the contract/supplier, or the contract must provide ordering information.

1. Go to the **Shop** page.

2. Enter your criteria in the keyword field (or whatever field you prefer), then click **Search**.

3. If a contract matches the criteria entered, the contract "link" displays, similar to the examples below:

   In the new shopping experience view, a contract icon next to a form in the search results indicates that it is associated with a contract. Hover over the icon to see the contract number and name. Click the icon to view additional details about the contract.

4. Select the **Form Name** to go directly to the form. If the supplier is not predefined in the form, it will be populated once selected so that the correct supplier and contract is used.

Complete the form and add it to your cart. An example is shown below.

5. After adding a line item from a form to your cart, the associated contract will be listed.

Trade-In Items

Overview

Many customers may need to make purchases for equipment when there is a used piece of equipment they can trade in to offset the cost of a new purchase. Organizations can choose to allow users to enter trade-in items with a purchase for such needs.

Related Permissions

When the trade-in feature is configured, users with the **Add/Edit Trade-Ins** permission can add a trade-in item to a cart.

Permission	Description	Location
Add/Edit Trade-Ins	Users with this permission have the ability to add trade-in items to carts, requisitions and purchase orders.	Permissions > Shopping > Carts & Requisitions
Modify Order Distribution Information on Forms & POs	Allows the user to override and change the order distribution settings for a supplier (i.e., on a trade-in item).	Permissions > Shopping > Carts & Requisitions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

How It Works

When the trade-in feature is configured, and a user has the appropriate permission, the option to add a trade-in item is available in these locations:

- In the **Shop > Shopping** navigation fly-out as a **Go To** option.
- As a **Go to:** option in the **Shop** widget on the Shopping Home page or a dashboard.
- As a **Go to:** option on the search results page.
- In the **Quick Links** widget, if added to the widget by the organization administrator or by a user on a personal dashboard.
- In the **Shopping Cart**, **Requisition** and **Purchase Order** as an **Add Trade-In** option, or within a supplier group as a link **Add trade-in for this supplier...**

When a user selects to add a trade in item, the information to be completed depends on the organization's configuration options. Users may see the ability to search for a supplier, manually enter a supplier, or designate the supplier as unknown. Some of the trade-in item details are required (indicated by a star ★), while other information is optional. Users can enter an Asset Tag Number, a Serial Number, and indicate the item as Taxable or as a Capital Asset.

A trade-in item must always be **linked** to another item in the cart **from the same supplier**. This allows budget checks to be run correctly, by indicating that the trade-in item is reducing the net cost of the purchased item. The linked item can be one from product search results, a punch-out item, a non-catalog item, or a form item. The user may add the new item to the cart first, or may start with adding the trade-in item.

Other configurations that may affect ability to add Trade-In items

Some organization configurations may affect the way trade-in items are handled in the purchasing process. If you do not believe the feature is working as designed, check with your site administrator to see if some organization settings may be affecting your request.

- **Taxable Status of Lines** - If the organization is configured to **Split PO on mixed taxable line status**, the linked item and trade-in item must contain the same taxable flag status. If this happens, the user will receive an error message and will not be able to place the order, to prevent the creation of a PO with a negative total. For example, if the trade-in item is marked as not taxable and the linked item is marked as taxable, the requisition would be split into two purchase orders and the link would no longer be in effect. This setting is available at **Setup > Hosted Catalog and Ordering Configuration > Default Ordering Settings > Tax**.

- **Accounting Code Splits** - When items are linked, the accounting codes cannot be split by amount of price. Percentage splits by price or quantity are still supported. This is to ensure budget checks are run correctly.

Add a Trade-In Item to a Cart

The following instructions are based on adding a trade-in item to a cart. The steps are the same if the user is adding the trade in item from other locations within the system.

1. Select the **Trade-In** link from the Shop navigation menu, the Shopping Home page or a dashboard, or in the search results. Or, select the **Add Trade-In** button or supplier group link from the active shopping cart. The **Add Trade-In** overlay displays.

2. The options for selecting a supplier and adding trade-in item information depend on your organization's trade in configuration settings. Contact your site administrator with any questions about the information required to be completed or if there is additional information you expect.

   a. Choose a **supplier**. When selecting a supplier, you can choose a specific fulfillment center. When manually entering a supplier, you will have to enter basic identifying information for the supplier. **Note:** If you select the link **Add trade-in for this supplier...** in the cart supplier group, the supplier information will be pre-populated.

   b. Review or edit/enter **Distribution Methods**. If a supplier is selected via search, the default Distribution Methods display for the supplier. Expand the section, and check to override any of the default methods (based on user permissions). If the supplier is manually entered, you will need to enter the distribution information. If the supplier selection is **Unknown**, no distribution method section is provided. **Note:** The option to edit Distribution Methods is only available if the user has **Modify Order Distribution Information on Forms & POs** permission.

   c. Enter **Trade-In Details** for the item. The Description, Quantity, Price and a Packaging UOM are required.

   d. Enter **Additional Details** for the trade-in item. Additional fields include **Asset Tag Number**, **Serial Number**, **Taxable** flag, and **Capital Asset** flag.

   e. Click **Save** and close the overlay.

3. The trade-in item will display in the cart with an icon ↰ , and an error message indicating the item must be linked to another item from the supplier.

4. If the item to be linked is not in the current cart, add it to the cart from product search or as a non-catalog item.

5. Select the trade-in item in the cart, and choose **Add Link to Item** from the **Line Item Actions**.

   a. In the **Add Link to Item** overlay, the supplier's items in the cart display.

   b. Click the **Select** button next to the item that will be linked to the trade-in item. The overlay closes, and the cart refreshes indicating the two linked items.

6. Proceed through the checkout process as normal. The trade-in item and linked item information are copied to all documents.

7. To ensure the budget check is run correctly, the user will see error messages if any of the following are not true:

- A trade-in item must be linked to a positive line item. Multiple trade-ins can be linked to one positive line item, but a positive line item can only be linked to one trade-in.

- Accounting codes must be the same on any linked trade-ins and positive line items.

- The total for each supplier must be positive.

Manage Shopping Carts

About Shopping Carts

Overview

Shopping Carts represent items selected for purchase from shoppers. They contain line items that represent items, goods, or services being requested.

The shopping cart process varies significantly for each customer due to the different JAGGAER products implemented, available functions in the shopping cart, fields required at checkout, and more. Listed below are some details related to shopping carts:

- For **eProcurement only** sites, the shopping carts simply represent the items being requested. Since the approval process occurs outside of the application, requested items do not necessarily equate to ordered items. In addition, header information is typically not tracked for shopping carts created in an eProcurement-only site.

- Users with **Shopping-only** permissions add items and/or requests to a cart, then assign the cart to another individual (requisitioner or approver) for submission.

- The term **requisitioner** is used to identify individuals who **submit carts**. In order to submit a cart, you must populate all required fields (if applicable).

- Depending on the site setup, by submitting a shopping cart, the request may be processed as an order, begin the approval process, or be exported to a third-party system.

- **Cart Preview** provides a way for a user to quickly glance at what has been added to the cart. Cart preview can be accessed from anywhere in the application so you do not have to leave your active page to view what's in the cart.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information about eProcurement permissions.

Shopping Cart Actions

Overview

Shopping Carts represent items selected for purchase from shoppers. They contain line items that represent items, goods, or services being requested.

The shopping cart process varies significantly for each customer due to the different JAGGAER products implemented, available functions in the shopping cart, fields required at checkout, and more.

Once a cart is created, regular cart actions include adding, removing, updating and copying items in your cart.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Cart Preview

Cart preview allows you to review your active shopping cart from anywhere in the application. Cart preview displays basic information about the items in your shopping cart. From cart preview you can access the full cart view or proceed to checkout.

1. Click on the shopping cart icon 100.00 USD 🛒 in the top banner.

2. Cart preview will display in a pop-up window. Information includes the name, quantity and price for each item in the active cart:

   - To access the full cart, click the **View My Cart** button.

   - To proceed to checkout, click the **Checkout** button.

   - To delete an item from the cart, click the trash can 🗑 icon beside the item.

Create or Activate a Cart

New carts can be created whenever necessary. You can create a cart to be used immediately (i.e., the Active cart) or draft carts for future use. Creating draft carts may be useful for setting up orders that are similar or that might be used later, i.e. standing orders or daily consolidated carts.

The cart that is currently in use is the active cart. Only one cart can be active at a time. On the Cart Management page, it is identified by the **Active** button displayed next to it. All the other carts are draft carts. You can change which cart is active from the Cart Management page.

Create a Cart from the Cart Management page

1. Go to the **Shop** **> My Carts and Orders > View Carts**.

2. Click the **Create Cart** button.

The new cart is created and displayed and you can begin adding items.

Create a Cart from an Existing Cart

1. Open a shopping cart.

2. Click the **Shopping Cart** heading in the top left corner of the page and select **Create New Cart**.

A new cart will be created and automatically open and become the active cart. The cart from which the new cart was created will be saved as a draft cart.

Activate a Cart

1. Go to the **Shop** **> My Carts and Orders > View Carts**.

2. Click **View** button next to the draft cart that you want to activate (i.e., it does not have the Active button next to it) and select **Activate**.

The cart becomes the active and the cart that was previously active is saved as a draft cart.

Add Items to a Cart

The sections below show how to add items to a cart from various locations. Unless otherwise noted, whenever an item is added to a cart, the system will confirm the total quantity of items added to the cart.

The **Cart** button in the top banner updates reflecting the total quantity and cost of items in the cart. i.e., 100.00 USD. You can click on the Cart button to preview the cart.

Add Items from the Product Search Results Page

1. Search for products using any of the search tools. Items that match the search criteria are displayed in the Search Results page.

2. Locate the item to add to the cart, enter the **quantity** and click **Add To Cart**.

Add Items from the Product

1. Search for products using any of the search tools. Items that match the search criteria are displayed in the Search Results page.

2. Click on an item's **Product Description** to open its Product Details popup.

3. Set the desired quantity and click **Add To Cart**.

Add Items from Product Comparison

1. Open the **Product Comparison** screen by clicking COMPARE on the items you want to compare, then clicking **Compare** button near the top of the shopping search results page. From this screen, items to cart in one of two ways:

2. Click the **Add To Cart** button for a single item.

OR

3. Place a check in the appropriate **Select** checkboxes, click **ACTIONS FOR SELECTED ITEMS** and choose **Add to Active Cart**.

Add Items from Favorites

1. Access **Favorites** from the Shop page.

2. Locate and select the appropriate personal or shared folder where the item resides.

3. From the right side of the pane, locate the item, update the defaulted quantity if needed, and click **Add to Cart**.

Add Items from Quick Order

1. From the **Shop** page, select **Go to: Quick Order** below the advanced/simple search or from the shopping menu.

2. (optional) Narrow your search by selecting a category in the **Category** field. All categories are searched by default (i.e., Everything).

3. Enter the **catalog number** for the item or items you are looking for. Click the search icon .

4. If Quick Order finds an exact match it will automatically add the product to the cart. The system also provides a comprehensive message about what was added, including Catalog Number, Description, and Supplier. The quantity is always 1.

5. If it finds multiple items that meet the search criteria the system will present the standard Product Search Results screen.

Add Non-Catalog Items

1. Open the non-catalog item entry screen. This screen can be accessed from different parts of the application, but is most often accessed from the **Shop** page, directly under the simple/advanced search. In this case, select **Go to: Non-Catalog Item**.

2. Complete the form and click **Save** or click **Save And Add Another** to save the non-catalog item and open a new non-catalog item entry screen.

Add Items from Forms and Requests

1. Access the **Forms** page. This screen can be accessed from different parts of the application, but is most often accessed from the **Shop** page, directly under the simple/advanced search.

2. Locate and select the appropriate personal or shared folder where the form resides.

3. From the right side of the pane, locate the form and click on the form name. The form will open up.

4. Populate the form and click **Add to Cart** from the action drop-down box, then click **Go**.

For additional information, please see "Forms" on page 117 and "Requests" on page 122.

Add Items from Punchouts

1. Access the **Shop > Shopping Home** page. On this screen, punch-outs can be accessed from the **Purchasing Showcase**.

2. Select the icon or name for the punch-out supplier.

3. The application redirects to the supplier's punch-out site.

4. Search for products and add products to the cart in the supplier's punch-out (this process varies from punch-out to punch-out).

5. Use the supplier's mechanism to return products to the JAGGAER application (this process again varies from punch-out to punch-out).

6. Upon returning to the application the user will be on the cart page.

Remove Items from Carts

Items can be removed from carts either individually or all at once. Items are typically removed when it is determined that another product is needed instead, the item does not fit (due to cost, quantity, etc.), or accidental selection.

Items can be removed from the cart, regardless if the item is from a form (services, goods, etc.), a punch-out item, hosted catalog item, or non-catalog item.

Remove a single item from a cart

1. Go to a shopping **cart** with items in it.

2. Locate the item you want to remove.

3. Select the actions icon ⋯ next to the line item and select **Remove**.

The system removes the item and updates the cart button totals in the upper right corner of the screen.

Remove selected items from a cart

1. Go to a shopping **cart** with items in it.

2. Select the checkbox next to each item you want to remove.

3. Select the drop down icon above the items in the cart and select **Remove Selected Items**.

The system removes the selected items and updates the cart button totals in the upper right corner of the screen.

Remove all items from a cart

1. Go to a shopping **cart** with items in it.

2. Click the **Shopping Cart** heading in the top left corner of the page and select **Empty Cart**.

3. Click **OK** in the confirmation window.

The system removes all items and updates the **Cart** button totals in the upper right corner of the screen.

Update Items in a Cart

Once products have been added to the shopping cart, it may be necessary to change some of the product information, such as quantity or unit price. There are different procedures for updating items from a hosted catalog, punch-out supplier, and non-catalog/form items. Here are the update options that are available.

Update the Quantity of a Hosted Catalog Item

1. Go to a shopping **cart** with a **hosted catalog item** or a **form** in it.

2. In the **Quantity** field for the item, modify the desired quantity.

The item is updated and cart totals are recalculated. An "All changes saved" message appears at the top of the page.

Update Information from a Form or Non-Catalog Item (accessed via the cart)

1. Go to a shopping **cart** with a form or non-catalog item in it.

2. Click on the **Product Name** in the row for the form. The complete form opens.

3. Update the appropriate fields (catalog #, price, etc.)

4. Select **Save**.

The form refreshes on the screen and the **Cart** button totals update based on the new price.

Change the Quantity of a Punch-out Item

Note: To select a different item or change configuration settings, you must select the punch-out item and go back to the punch-out site to make changes.

1. Go to a shopping cart with a punch-out catalog item.

2. In the **Quantity** field for the product modify the desired quantity.

The item is updated and cart totals are recalculated. An "All changes saved" message appears at the top of the page.

Change the Supplier for Multiple Items

1. Go to a shopping cart with a multiple items.

2. Select the line items to change the supplier. **Note:** This option is only available for non-catalog items with an existing supplier and forms items.

3. Click the drop down menu icon ▼ displayed above the line items (right side) and select **Change Supplier**.

4. Enter or select the new supplier, then click **Save**.

Change Price of an Item

You can manually change the price of an item.

1. Open a shopping cart or requisition.

2. Scroll down to a line item and select **Change Price** from the actions menu ⚫⚫⚫. The **Change Price** overlay opens.

3. Select the appropriate pricing for the item by choosing one of these options in the options in **Select a Price and Contract Here**:

- *Select a price* - Select the radio button next to the appropriate price.

- *Enter a manual price* - Click the Manual radio button and enter a price in the open field

4. Click **Save**. The item price is changed.

If your organization has contracts with various vendors and suppliers and when you are shopping for items, you can also apply a contract to items in a cart or requisition. See Select Price or Contract for Items in a Cart or Requisition for more information about applying contracts to items.

View Line Item History

The Line Item History feature allows users to view all purchases of the same item within a date range specified by the organization. Having the ability to see other recent purchases may prevent unnecessary external purchases. See also Preview and Review Carts

To perform this task, users must be assigned the View Line Item History permission, which applies to both hosted catalog and punch-out items only.

1. Open a shopping cart with **hosted catalog** or **punch-out items**.

2. Locate the item for which you would like to view the history.

3. Select the actions icon ••• to the right of the line item and select **Line Item History**.

4. The **Line Item History pop-up** opens.

- **Previous Purchases Found** - An item having previous purchases that fall within the search criteria will display the item's description and details regarding those previous purchases, including Quantity, Date, User ID and User email address.

- **No Results Found** - An item having no previous purchases meeting the organization's time frame, department, and custom field criteria (if any) will display the item's description and a message that no items were found.

Add Discount

You can apply a discount to a line item in a cart. See also Apply Discounts.

1. In your cart or when checking out, take one of the following actions:

   - **Add a Line-level Discount** - Click the actions icon ⚹⚹⚹ on a line item and select **Add Discount** from the drop down menu.

   - **Add a Supplier-level Discount** - Locate the supplier group. Click the actions icon ⚹⚹⚹ in the supplier group header and select **Add Discount** from the drop down menu.

2. The **Add Discount** or **Edit Discount** (if there is an existing discount) overlay opens. It displays the supplier name, the discounted line(s) and the price subtotal for the discounted item(s). Configure the following discount fields:

   - **Pricing Code** (optional) - If there's a code associated with the discount, enter it in this field. **Important Note**: This field is optional and is not used to calculate the discount, which is done manually in the following fields.

   - **Apply Discount** (required)- Select **Before Tax Calculations** to apply the discount before taxes, or **After Tax Calculation** to apply it after. **Note:** If your organization does not have the tax estimate feature enabled, this field does not display.

   - **Discount** (required) - Click the appropriate radio button to determine if the discount will be based on a percentage or amount.

     - **Percentage** - If you select this option, enter a value in the field to apply a percentage discount. For supplier-level discounts, the percentage applies to each item. For example, if you apply a 50% discount, each item will be discounted 50%.

     - **Amount** - If you select this option, enter a value in the field to apply an amount discount. For supplier-level discounts, the amount is divided among all items and is weighted based on the cost of the item. The discounts for each item add up to the total discount amount. You are able to adjust the amount of the discount per line. To do so, click the **More Actions** button and select **Edit Discount**. **Important Note:** The discounts per line item must add up to the total discount amount for the supplier. You will get an error if you attempt to submit a cart or document with mismatched amounts.

3. **Preview Calculations** - Select this link to see a preview of the discount before applying it.

   - If you chose to apply the discount before tax calculations, the information includes the extended price subtotal, discount amount calculated from the extended price subtotal, discounted extended price subtotal, taxes estimated for the discounted extended price subtotal, shipping and handling, and a total.

   - If you chose to apply the discount after tax calculations, the preview will display the extended price subtotal, tax calculated against the extended price subtotal, discount amount calculated on the extended price, shipping and handling, and then a total. For multiple items discounted on the supplier level, the preview shows the totals for all items.

4. Click **Apply**.

Add to Favorites

You can add an item or items as a favorite from your shopping cart if you have the appropriate permissions. See also Favorites.

1. Open a shopping cart or requisition.

2. Locate the item to add as a favorite. Click the actions menu **•••** and select **Add to Favorites**.

3. Configure the favorite by completing fields in these sections. Fields with ★ are required.

   Edit Item Details

   - **Item Nickname** - Enter a reference name for the item. **Note:** The item name is entered by default.

   - **Quantity** - Enter the default quantity for the item. For example, if you always buy five cases of paper at a time, you may want the default quantity to be **5**.

   - **Description**- Enter a meaningful description for the favorite.

   Select or Create a Destination Folder

   - Select or create a folder in which to store the favorite. If you would like to add a new folder, click the **Create New** drop-down. Your personal folders will display in the **Personal** menu. If you have general access to one or more shared folders, those folders will display in the **Shared** menu.

4. Click the **Save Changes** button.

Move to Another Cart

You can move a line item to another cart.

1. Open a shopping cart or requisition.

2. Locate the item you want to move and select **Move to Another Cart** from the actions menu **•••**.

3. Choose one:

   - *Move to an existing cart* - Under the list of draft carts available, click the **name** of the draft cart that you want to move the item into. The item is moved into the selected cart.

- *Move to a new cart* - Click **Move to a new cart**. A new draft cart containing the item is created.

Add to Draft Cart or Pending PR/PO

You can move a line item to a draft cart or a pending requisition or purchase order.

1. Open a shopping cart or draft requisition.

2. Locate the item you want to move and select **Add to Draft Cart or Pending PR/PO** from the actions menu ⚫⚫⚫. An overlay opens and displays a list of draft carts, pending requisitions and pending purchase orders that the line item can be moved into.

3. Select the radio button next to cart, PR or PO that you want to move the item into and click **Add**. The item is moved to the selected document.

Add to PO Revision

You can move a line item to purchase order revision.

1. Open a shopping cart or draft requisition.

2. Locate the item you want to move and select **Add to PO Revision** from the actions menu ⚫⚫⚫. An overlay opens and displays a list of purchase orders that the line item can be moved into.

3. In the overlay, **select a purchase order** by clicking the Add icon ➕ next to it. The item is added to the selected purchase order.

Copy Previous Carts to a New Cart

Users can copy requisitions into a completely new cart, providing a very convenient way to repeat an order. Items can be removed or additional products can be added to the cart if needed. This is commonly done when orders are rejected or there is a problem for whatever reason. Instead of "restarting" the original order, a new order is created with a different number and date.

Note: Purchase requisition order history permissions are required to perform this task.

1. Locate the requisition by performing a document search.

2. Open the requisition. From the **Actions** drop-down menu select **Copy to New Cart**.

3. A new shopping cart is created with all line item(s) and requisition custom information included.

Note: When you create a new shopping cart, you will be taken to Save Updates section of the cart, and any previously open shopping cart is saved as a draft.

Apply Discounts

Overview

Discounts can be applied on both the supplier level (applying a discount to all products from a specific supplier) and the line level. A discount can be an amount or a percentage. **Important Note**: This feature is used for applying MANUAL discounts. While there is an option to include a discount code, there is no validation of that code and discounts are not calculated by the application. The shopper is required to enter all of the details. It is important for organizations to establish best practices for using the feature to avoid erroneous discounts.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Apply a Discount in the Cart

1. In your cart or when checking out, take one of the following actions:

   - **Add a Line-level Discount** - Click the actions icon ••• on a line item and select **Add Discount** from the drop down menu.

   - **Add a Supplier-level Discount** - Locate the supplier group. Click the actions icon ••• in the supplier group header and select **Add Discount** from the drop down menu.

2. The **Add Discount** or **Edit Discount** (if there is an existing discount) overlay opens. It displays the supplier name, the discounted line(s) and the price subtotal for the discounted item(s). Configure the following discount fields:

   - **Pricing Code** (optional) - If there's a code associated with the discount, enter it in this field. **Important Note**: This field is optional and is not used to calculate the discount, which is done manually in the following fields.

   - **Apply Discount** (required)- Select **Before Tax Calculations** to apply the discount before taxes, or **After Tax Calculation** to apply it after. **Note:** If your organization does not have the tax estimate feature enabled, this field does not display.

- **Discount** (required) - Click the appropriate radio button to determine if the discount will be based on a percentage or amount.

  - **Percentage** - If you select this option, enter a value in the field to apply a percentage discount. For supplier-level discounts, the percentage applies to each item. For example, if you apply a 50% discount, each item will be discounted 50%.

  - **Amount** - If you select this option, enter a value in the field to apply an amount discount. For supplier-level discounts, the amount is divided among all items and is weighted based on the cost of the item. The discounts for each item add up to the total discount amount. You are able to adjust the amount of the discount per line. To do so, click the **More Actions** button and select **Edit Discount**. **Important Note:** The discounts per line item must add up to the total discount amount for the supplier. You will get an error if you attempt to submit a cart or document with mismatched amounts.

3. **Preview Calculations** - Select this link to see a preview of the discount before applying it.

   - If you chose to apply the discount before tax calculations, the information includes the extended price subtotal, discount amount calculated from the extended price subtotal, discounted extended price subtotal, taxes estimated for the discounted extended price subtotal, shipping and handling, and a total.

   - If you chose to apply the discount after tax calculations, the preview will display the extended price subtotal, tax calculated against the extended price subtotal, discount amount calculated on the extended price, shipping and handling, and then a total. For multiple items discounted on the supplier level, the preview shows the totals for all items.

4. Click **Apply**.

Select Price or Contract for Items in a Cart or Requisition

Overview

Your organization most likely has contracts with various vendors and suppliers and when you are shopping for items, you can locate and identify contract items for purchasing.

Contracts can be set up to "Apply Automatically" to a line item in a cart or requisition. If a contract is set up to Apply Automatically, a contract number is automatically assigned to the line item when it is added to your cart and no human intervention is required.

If a contract is not automatically applied to a line item, users with the appropriate permissions can apply contracts to items in a cart or requisition. This includes non-catalog items that have been added to cart if they have a supplier that has been selected with supplier search. The non-catalog item in the cart is linked to the contract, but it is not added to the contract.

Sometimes there can be multiple contracts that could be assigned to a line item. Multiple contract options can occur when multiple price files/contracts exist, or simply, when multiple contracts exist for non-catalog items. If a user has access to multiple contracts, they can select the appropriate contract to apply to an item in their cart.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Assign a Contract to an Item, Change the Contract Assigned to an Item or Change the Price of an Item

1. Open a shopping cart or requisition.

2. Scroll down to a line item and complete one of these options. Whichever option you choose, the same overlay opens:

   - *If no contract is assigned to the item* - The **Contract** field on the line item will display a **choose contract...** link next to it. Click the **choose contract...** link.

   - *If a contract is assigned to the item* - The **Contract** field displays a **contract number** next to it. Depending on what view you are in, you may see a **Select price or contract...** link, a **Change Price** link, or a **Change** link next to the contract number. Click any of the links.

3. The **Change Price** overlay opens.

- One or two sections appear in the overlay, depending on what contracts and pricing are available.

    - The **Select Pricing Assigned Contracts Here** section is shown if one or more price sets are assigned to a contract. It displays all contracts where pricing is assigned. It is not displayed if there are no price sets assigned to the contract.

    - The **Select a Price and Contract Here** section is shown if there is pricing that is not assigned to a contract. This section displays all non-associated contracts and prices that are available for selection. This is also where you can enter a price manually.

- The price and contract that are currently selected for the item are indicated by the enabled radio button. By default, for hosted catalog items, the least expensive option is selected, but this can be overridden.

4. Select the appropriate pricing and/or contract for the item by choosing options in ONE of the sections in the overlay as follows:

- **Select Pricing Assigned Contracts Here** - Check the radio button next to the appropriate contract/pricing combination.

- **Select a Price and Contract Here** - Complete one of these options:

  - *Select a price associated with a contract* - Select the radio button next to the appropriate price in Step 1, then select the appropriate contract in Step 2.

  - *Enter a manual price* - Click the Manual radio button and enter a price in the open field, then select the appropriate contract in Step 2.

5. Click **Save**. The selected contract and price are assigned to the item. **Note:** For non-catalog items that have been created in the cart

View Additional Details about a Contract

The drop down menu next to a contract provides additional options for viewing contract information.

1. Open a shopping cart or requisition.

2. Scroll down to a line item that is assigned to a contract.

3. Click the **contract number** or the drop down menu icon next to it and choose one of the following options. The options displayed will depend on your user permissions:

- **View Summary** - This option opens the Contract Summary page of the contract. Users with access to the contract can click **Go To Contract** in this window to open the contract. **Note:** The Contract Summary page also opens if you click the **more info...** link next to the contract number.

- **Edit/View Details** - For users with access to the contract, this option will open the Header page of the contract.

- **View Org Catalog Items** - For users with appropriate permissions, this option will take you to the View All Org Catalog Items page.

- **View Contract Items** - For users with access to the contract, this option will open the Goods and Services page of the contract.

- **Shop for Contract Items** - This takes you to the simple search page.

Remove a Contract from Multiple Line Items

You can remove a contract assigned to items on a cart or requisition.

1. Open a shopping cart or requisition.

2. On the right hand side of the page, **select the checkbox** next to each line item that you want to remove the contract from.

3. Go to the top of the page. Expand the **Actions** menu and select **Remove Contract from Selected Lines**.

4. Select **Yes** in the confirmation window. The contract is removed from the line items on the cart or requisition only.

Place Orders on Behalf of Other Users

Overview

A user can place an order for another user in the application. This functionality is mostly used when a department administrator places an order for other individuals in their department. By indicating the person they are ordering the item(s) for, the original requester can still see their order via Document Search, and reporting information is not compromised.

Note: The original requester must have a username to perform this function.

In this scenario, the user who creates the cart for another user is considered the **Prepared By** user and the user with the original request is the **Prepared For** user. The Prepared By user can see the PR and the PO(s) generated for the Prepared For user. This allows the Prepared By user to maintain visibility into a PO after they have created it.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Note: A significant number of notifications are available to users who prepare orders for others. These include:

- Prepared By – PO Distribution Failure Notice
- Prepared By – Cart Assigned Notice
- Prepared By – PR rejected/returned

- Prepared By – PR line item(s) rejected
- Prepared By – PO Workflow complete
- Prepared By – PO sent to supplier
- Prepared By – PO line item(s) rejected
- Prepared By – PO rejected
- Prepared By – PO Requires Receipt Notice
- Prepared By – Invoice Requires Receipt Notice
- Prepared By – PR has lines that have been sent to bid
- Prepared By – Awarded PR is created

Place an Order for Another User

1. Open an active cart and proceed to the checkout page.

2. Select the Prepared For user:

    a. Locate the section that contains the **Prepared for** field and click the edit icon ✏.

    b. In the **Prepared for** field, begin typing the name of the person you are looking for and select it once it is displayed, or click the search icon 🔍 to open the User Search window.

    c. If you have opened the User Search window, click the add icon ➕ next the appropriate user. The **Prepared For** field now displays name of the selected user.

    d. Click **Save Changes**.

3. Select **Place Order** to complete the order.

Please note:

- The requisition is created in the name of the selected user and appears in My Requisition list of the selected user.

- The values in the Details section of the requisition, such as Ship To and Bill To addresses and Codes, are the values from profile of the user who created the requisition and NOT profile of the selected user.

- The header information of the requisition indicates the names of both the Prepared By user and the Prepared For user.

- If your organization has the **Update Custom Field and Address Values based on Prepared For user** setting enabled, the following occurs:

  - The custom field values default to the default values of the selected Prepared For user.

  - The Ship To and Bill To addresses default to the addresses of the selected Prepared For user including contact lines.

  - The custom field value personal list of the Prepared For user is merged with the list of the submitter (prepared by user). Submitters are able to choose from their own lists or the **Prepared For** user's list.

  - The next approver updates to the next approver of the Prepared For user.

  - Submitters continue to see only the fields to which they have access.

Preview and Review Carts

Overview

Cart preview allows you to review your active shopping cart from anywhere in the application. The History tab and View Line Item History option allows you to review activity that occurs on carts and line items previous to submitting a cart.

Related Permissions

Permission	Description	Location
View Line Item History	Provides the user with the ability to perform a line item history search. Line item history searches past requisitions and orders within the organization for that exact catalog item. This permission displays the line item history button next to each line item in a requisition.	Permission Settings > Shopping Carts & Requisitions> Cart/Requisition

See for information on eProcurement permissions.

Cart Preview

Cart preview allows you to review your active shopping cart from anywhere in the application. Cart preview displays basic information about the items in your shopping cart. From cart preview you can access the full cart view or proceed to checkout.

1. Click on the shopping cart icon `100.00 USD` 🛒 in the top banner.

2. Cart preview will display in a pop-up window. Information includes the name, quantity and price for each item in the active cart:

    - To access the full cart, click the **View My Cart** button.

    - To proceed to checkout, click the **Checkout** button.

    - To delete an item from the cart, click the trash can 🗑 icon beside the item.

Review Cart History

A History tab in the cart tracks activity that occurs previous to submitting a cart. It can be viewed from a shopping cart or during checkout. The cart history provides a LISTING of the current line items in the cart. As items are added, a line in History is added and as items are removed from the cart, the line is removed. (**Note:** A "delete" line is not created in history). History also indicates the following:

- If an item was selected from a favorite.

- Details about cart assignment (if applicable), including what user was assigned the cart and when the assignment occurred.

- If the cart was created from a previous cart, and if so, the requisition # of the previous cart.

- When items were added and by who, the product name, and line number.

- If a price was changed, for which line, and the reason the price changed.

Review Cart History

1. Open a cart with **hosted catalog** or **punch-out items**. If you want to view the cart history at checkout, click **Proceed to Checkout**.

2. Depending on whether you are in a shopping cart or at checkout, choose one of the following actions:

   - *From a shopping cart* - Click the actions icon ● ● ● near the top right corner of the page and select **View Cart history**.

   - *From Checkout* - Click the **History** tab.

3. The history for the draft cart is displayed. As with other History trails, you can filter by date or action (approvals, modifications, etc.).

4. If desired, you can also export the information via a CSV file by clicking the **Export CSV** button.

Review Line Item History

The Line Item History feature allows users to view all purchases of the same item within a date range specified by the organization. Having the ability to see other recent purchases may prevent unnecessary external purchases.

To perform this task, users must be assigned the View Line Item History permission, which applies to both hosted catalog and punch-out items only.

1. Open a shopping cart with **hosted catalog** or **punch-out items**.

2. Locate the item for which you would like to view the history.

3. Select the actions icon ● ● ● to the right of the line item and select **Line Item History**.

4. The **Line Item History pop-up** opens.

   - **Previous Purchases Found** - An item having previous purchases that fall within the search criteria will display the item's description and details regarding those previous purchases, including Quantity, Date, User ID and User email address.

   - **No Results Found** - An item having no previous purchases meeting the organization's time frame, department, and custom field criteria (if any) will display the item's description and a message that no items were found.

Shopping Personas

Overview

Organizations using Departments or Multi-Business Units can configure users to shop for more than one department or business unit. The **Shopping Persona** feature allows you to shop for more than one department or business unit without having to change the field in your profile. You can simply select the appropriate persona and shop with the available forms, favorites, and showcase assigned for the department or business unit. This is a useful feature if you split your shopping responsibilities across departments or business units. Personas can also be based on positions and account code favorites.

Important Information about Changing Personas

- Changing the persona during cart creation or checkout will update the elements defined on the persona- this includes fulfillment center access based on business unit, product pricing, assigned code favorites, etc.

- If you submit a requisition while using a persona, the department or business assigned to the persona will be stamped on the requisition at the time of submission and will be logged in the document's history. (If the user is not using a persona, then the department or business unit from their profile is stamped on the requisition.)

- When creating "prepared for" orders, the personas are not taken into consideration. Your user profile department or business unit will be stamped on the order at the time of submission.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Change Your Shopping Persona

At each session log-in, your persona is reset to the default profile. You must manually choose a persona for shopping after each log in. Personas must be set up by an administrator. Please contact your System Administrator for information about your shopping personas.

1. Click on your user profile icon ![icon] in the top right banner and select **Change Shopping Persona**.

2. A list of available personas will display. Click on the persona to which you would like to change.

3. Your persona will be changed. The icon beside your profile name will indicate that you are shopping with a persona. The persona you are shopping for will display on the shopping pages.

See also "Enable Shopping Personas " on page 477

Shared Carts

Overview

The shared cart feature allows organizations to combine shopping and purchasing into shared carts for group orders. All group members are able to simultaneously shop and monitor cart contents, avoiding duplication, while alleviating workload for personnel who process multiple individual orders. With group shopping, shared carts can also be used to achieve discounts with suppliers that provide bulk order discounting.

User Groups

In order to shop in a shared cart, you must be part of a user group. User groups may be created by administrators but are often created by a manager or other user who is part of the group itself. User groups can include both individual users and/or departments. You must have one of the following permissions to be able to create and manage user groups:

- **Managing shared cart user groups**. This permission gives users the ability to create new shared cart user groups and manage user groups that they own.

- **Administer shared cart user groups**. This permission is similar to managing shared cart user groups but users with this permission can also manage user groups that are owned by other users.

For information about creating user groups please see Shared Cart Administration.

How do I know that a cart has been shared with me?

Because the Shared Cart functionality was created primarily for small groups within an organization, you will most likely be aware that you are part of that user group and/or have a cart shared with you. However, carts that have been shared with you are visible in your draft carts in the section **Drafts Shared With Me**, indicating that the cart has been shared with you.

Related Permissions

The **Share cart with others** permission is needed to perform this task (**Permission Settings > Shopping, Carts & Requisitions > Cart/Requisition**).

Permission	Description	Location
Share cart with others	Provides user the ability to share carts with others. The permission makes visible a check-box on carts that gives the user the ability to turn on cart sharing and choose an existing shared cart user group to share with. Users with this permission can only choose to share carts with groups they are a member of unless they also have the permission to Manage shared cart user groups or Administer shared cart user groups which will allow the user to share the cart with groups they have created.	Permission Settings > Shopping, Carts & Requisitions > Cart/Requisition

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Locking/Unlocking a Cart

All users in a shared cart can add items simultaneously, but any other editing of the cart requires the cart to be locked, preventing other users from adding items or modifying the cart during an edit session. A locked cart is indicated by the "lock" icon to the left of the shopping cart name as shown below:

You can add and delete items. In addition, if you have the **Edit Shared Carts locked by Me** permission can make take the following actions on a cart that they have locked:

- Edit the cart name while the cart is in draft format or in advanced checkout. If the permission is not enabled, the cart name field is read only.

- Edit the cart description in advanced checkout. If the permission is not enabled, the cart description field is read only.

- Delete a shared cart that they have locked. A **Delete** button displays in the **Drafts Shared with Me** list.

- Delete any unlocked shared cart. A **Delete** button displays in the **Drafts Shared with Me** list.

The cart lock will time out if the cart is inactive for a set period of time. Please contact your System Administrator for information about how long it will take your cart lock to time out.

1. Go to **Shop** **> My Carts and Orders > View Carts**.

2. Click on the **Shared Carts** tab.

3. Locate the cart you want to lock or unlock.

4. In the Action column, expand the **View** menu and select **Lock**. The cart will be locked and cannot be edited by other users. Click the **View** button a second time to open the cart.

5. You can add and delete items. In addition, if you have the **Edit Shared Carts locked by Me** permission, you can make take the following actions on a cart that you have locked:

    - Edit the cart name while the cart is in draft format or in advanced checkout. If the permission is not enabled, the cart name field is read only.

    - Edit the cart description in advanced checkout. If the permission is not enabled, the cart description field is read only.

    - Delete a shared cart that you have locked. A **Delete** button displays in the **Drafts Shared with Me** list.

    - Delete any unlocked shared cart. A **Delete** button displays in the **Drafts Shared with Me** list.

6. After you have made the appropriate edits, click the **Update and Unlock** button. The cart will be unlocked.

Add Non-Catalog Items to a Shared Cart

Catalog items are added to a shared cart in the same way as they are added to other active and draft carts. When you choose to add a non-catalog item, you simply select the shared cart as the cart to which you are adding the item. For more information about adding items to carts please see Add Items to a Cart.
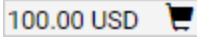
Non-catalog items can be added to the open shared cart but the cart will need to be locked in order to use this feature.

1. Go to **Shop** > **My Carts and Orders > View Carts**.

2. Click on the **Shared Carts** tab.

3. Locate the cart you want to edit. Expand the **View** menu in the Action column and select **Lock**. The cart will be locked for editing to all other users.

4. Click the **View** button a second time to open the cart.

5. Find an item with the supplier that you want to add a non-catalog item to. Click the actions icon ⬤⬤⬤ next to the supplier name and select **Add Non-Catalog Item** and enter item information. **Note:** The non-catalog item's Supplier field will populate with the supplier's name by default. If you want to create a non-catalog item and enter a supplier manually or the supplier is not known, select the Add Non-Catalog Item option for any supplier and switch the Supplier field to Enter Manual, or Not Known.

6. Click **Save and Close** or **Save and Add Another** if you want to add another non-catalog item.

7. The item(s) will be added to the cart. Remember to unlock the cart.

Share Your Cart

Users with appropriate permissions can share their carts with other users in their user groups.

The **Share cart with others** permission is needed to perform this task (**Permission Settings > Shopping, Carts & Requisitions > Cart/Requisition**).

1. Open the cart you want to share in one of following ways:

   • Click the cart icon `100.00 USD 🛒` in the top banner of your screen.

   • Go to **Shop** > **My Carts and Orders > View Carts**. Locate the appropriate cart for sharing and click the **View** button to open it.

2. Click the drop down menu next to the **Shopping Cart** heading in the top left corner of the page and select **Share Cart With**. A list of user groups to which you belong and with whom you can share carts is displayed.:

3. Select the **user group** you want to share your cart with. The cart is shared with members of the user group and the header displays "Shared Cart". The cart is automatically locked when you share your cart.

Shared Cart Notifications

Shared cart users can get PO and PR notifications related to shared carts in which they have ordered. Notifications will only be sent to the user if they placed an order in a cart. Notifications will not be sent to a user simply because that user is in the shared cart's user group.

Note: Depending on your role and permission level, you may or may not have access to your notification preferences. If you do not have access, please contact your System Administrator.

1. Access your user profile.

2. In your user profile go to **Notification Preferences**.

3. Locate the **Shopping, Carts & Requisitions** section.

4. Click the **Receive PR and PO notifications for shared carts I am a participant of** checkbox.

5. Click the **Save** button.

The View Carts Screen

Overview

Often, users in large organizations are required to manage several draft carts at one time. The **View Carts** screen provides an organized view of a user's draft carts. The screen organizes the draft carts into three tabs: **Draft Carts**, **Assigned Carts** and **Shared Carts**.

- The tab that contains the active cart is noted with a shopping cart icon 🛒.

- The carts in each tab are displayed in a list. They can be sorted by column. In addition to basic information, each cart has an associated **Action** button. The actions available vary depending on the tab:

- Draft carts can be activated or deleted.

- Assigned carts can be unassigned.

- Shared carts can be locked/unlocked or deleted.

For additional information about creating consolidated carts, please see Admin and Shopping Settings.

Related Permissions
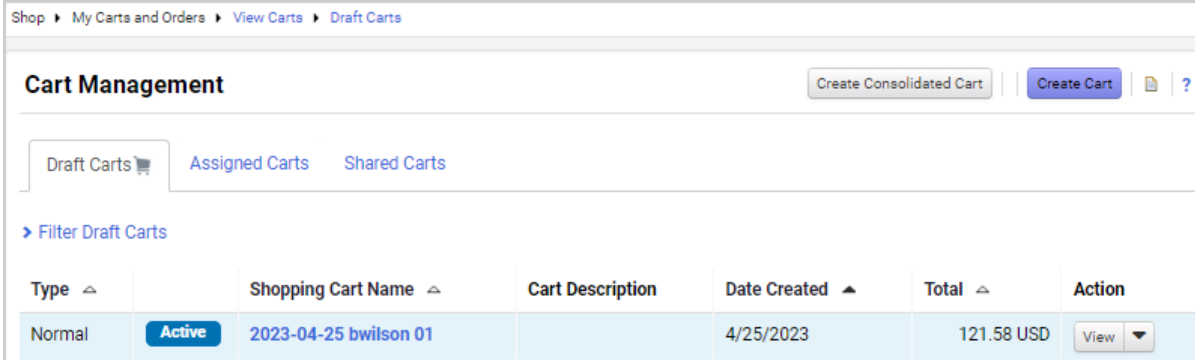
Users with appropriate permissions have the ability to create a new cart or create a consolidated cart from the View Cart screen.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Accessing Carts

The **View Carts** screen can be accessed by:

- Navigating to **Shop** ⬛ **> My Carts and Orders > View Carts**.

- From a cart, click the actions icon • • • near the top right corner of the page and select **View Carts**.

Draft Carts

This tab displays your draft carts that have not been assigned to an approver. You can filter the carts displayed using the following criteria:

- **Cart Name** - To filter carts by cart name, enter a value in the field.

- **Date Created** - To filter carts by the cart creation date, enter a date value in the field or click the calendar icon to select a date.

- **Cart Type** - Select an option to display all carts, normal carts (non-consolidated), or consolidated carts.

- **Cart Status** - Select an option to display all carts, non-returned carts, or carts returned by an approver or assignee.

Click the **Filter** button to apply the criteria. Click the **Clear** button to remove all criteria.

Assigned Carts

This tab displays your draft carts that have been assigned to an approver. The carts being displayed can be filtered using the following criteria:

- **Cart Name** - To filter carts by cart name, enter a value in the field.

- **Date Created** - To filter carts by the cart creation date, enter a value in the field or click the calendar icon to select a date.

- **Prepared for User** - To filter carts by the user for which they were prepared, begin typing value in the field or click the search icon to search for a user. You can enter multiple users in this field.

- **Assigned to User** - To filter carts by the user to which they were assigned, begin typing value in the field or click the search icon to search for a user. You can enter multiple users in this field.

Click the **Filter** button to apply the criteria. Click the **Clear** button to remove all criteria.

Note: You can assign a substitute approver from this screen. For additional information, please see Assign and Review Carts.

Shared Carts

This tab displays all draft shared carts to which you are assigned. You can filter the carts displayed using the following criteria:

- **Cart Name** - To filter carts by cart name, enter a value in the field.

- **Created By** - To filter carts by the users who created them, begin typing value in the field or click the search icon to search for a user.

- **Date Created** - To filter carts by the cart creation date, enter a value in the field or click the calendar icon to select a date.

- **Prepared for User** - To filter carts by the users for which they were prepared, begin typing value in the field or click the search icon to search for a user. You can enter multiple users in this field.

- **Locked By** - To filter carts by the users who locked the cart, begin typing value in the field or click the search icon to search for a user. You can enter multiple users in this field.

- **Lock Status** - Select an option to display only locked or unlocked carts.

Click the **Filter** button to apply the criteria. Click the **Clear** button to remove all criteria.

Checkout

The Checkout Process - Submitting Requisitions

Overview

After completing all shopping, the checkout process begins. The complexity and steps involved in checking out varies per organization and per user. Generally, the following steps may be involved, but keep in mind that this will be different for each organization.

1. **Submit Cart** - After completing all shopping, users begin the checkout process by submitting their cart. If your organization manages requisitions through the application, users can click **Assign Cart** to send to another user for review, or they can click **Proceed to Checkout** to begin the checkout process.

2. **Complete Requisition** - A cart becomes a draft requisition at checkout, where additional information about the order is completed. A user can add or update various details on the order such as selecting the Ship To and Bill To addresses.

   The activities and information required to complete and process a requisition are defined by your organization. Tabs on the requisition may allow users to view a summary of the order, view or edit shipping and handling information (as permissions allow), see a snapshot of what the PO will look like when processed, add comments or attachments, and review actions performed on the requisitions.

3. **Submit Requisition (Assign or Place Order)** - Once the requisition is ready to go, requisitioners can submit their orders or orders assigned to them by a system shopper. By submitting a requisition, the order may begin the approval process or be sent to an outside system for processing. Sometimes this means sending the order to an external ERP system, starting the approval process, or creating and delivering a PO to a supplier. **Note:** Checkout will not occur until all system errors are corrected.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Requisition Tabs and Fields

The activities and information required to complete and process a requisition are defined by your organization. Here is an overview of commonly used tabs and fields that users may see on a requisition. Keep in mind that the sections and fields displayed on a requisition will vary for each organization.

Summary Tab

Here are some of the types of information that may be displayed or required on a requisition on the **Summary** tab of a requisition:

- **General** - This is an overview of the order and displays general information about the requisition, such as the cart name, a description, and the Prepared By and Prepared For users. Some of these fields may be available on the General section:

    - **Cart Name** - Depending on your organization's setup, the system may automatically assign a unique name to a cart to identify it. Users may be able to edit the cart name if permissions allow. Once a requisition is submitted, this name becomes the Requisition Name. If using shared cart, only the shared cart owner can edit the Cart Name.

    - **Purchase Order (PO Number)** - The purchase order numbers associated with the requisition. Each PO number is a link to the purchase order document. Certain organizations may allow users to enter their own PO number in the cart; in other instances, PO number(s) are not available until the requisition is complete and a purchase order is created.

    - **Description** - Allows a user to add a brief description of the requisition.

    - **Prepared by** - Captures the name of the individual who created the requisition.

    - **Prepared for** - Allows a user to prepare the requisition for a different user. The field displays the name of the person who created the requisition by default, but users with the appropriate permission can select an individual for whom they are preparing this requisition, if different from themselves. See Place Orders on Behalf of Other Users for more information.

    - **PO Clauses** - PO Clauses represent special conditions the supplier should reference regarding the order. Orders can contain one or more PO Clauses. Clauses can be assigned to all orders by default, and be overridden on an order.

- **Shipping** contains information related to shipping and delivery for a requisition.

- It displays the **Ship To** address, which is the address that the item will be shipped to by the supplier.

- It may also include **delivery options**, where users can select delivery preferences such as the shipping carrier, shipping dates, or an Expedite checkbox that can be used to flag an item as a rush item.

- **Billing** contains information related to billing and payment for a requisition.

    - It displays the **Bill To** address, which is the address that the invoice will be sent to by the supplier.

    - It may also include credit card or payment information.

- **Accounting Codes** contains organizational accounting information that is captured with the requisition. Various codes used by an organization can be selected so that the purchase is billed to the proper financial source.

    - **Splits at the Header-Level and Line-Level** - Requisitions can be split between different account code custom fields at the header-level by a percentage of quantity or a percentage of price. At the line-level, account codes can be split by percentage of quantity or price, and also by amount of quantity or price. This allows users to assign specific amounts to different accounts or codes when creating or settling an order, rather than being limited only to percent of quantity or price. For instance, if a requisition subtotal is $9000, and a given account has exactly $4000 left in it, the order can be split with $4000 applied to the limited account and $5000 applied to another account, rather than calculating those exact amounts using percentages of the requisition subtotal.

- **Notes and Attachments** - This section displays notes and attachments added by the user. They can be internal notes and attachments, which are only visible to users within the application, or external notes and attachments, which are visible to both users in the application and to suppliers. Attachments added here are also available on the Attachments tab. Notes are only visible on the Summary tab.

    - **Internal Notes and Attachments** - Users can add notes or attach files to the requisition and they are available to approvers as the requisition goes through workflow. Internal notes and attachments are not visible to anyone outside of the organization (i.e., suppliers).

    - **External Notes and Attachments** - Contains external notes and attachments related to the requisition that are visible to individuals outside of the application, including suppliers. This section can contain a **Note to all Suppliers** field that allows

users to add a detailed note to the requisition which is available to approvers and is sent on to suppliers with the PO. The note is sent with all POs that are generated from the requisition.

- **Additional Notes** (if configured for your organization) - An Additional Notes section is displayed on PRs and POs if configured for your organization. Users can add multiple notes to it, with a maximum of 1000 characters each. A maximum of 10 notes is recommended.

- **Items** - All items on the order are listed with detailed information about each item, i.e., the supplier, manufacturer number, quantity ordered, etc.

Taxes/S&H Tab

The **Taxes/S&H** tab displays the tax, shipping and handling charges that are associated with each line item on a requisition. Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Users with the **Allow editing of Tax, Shipping, and Handling** permission can edit this information on a document if needed.

See Entering Tax, Shipping & Handling Information for details about completing tax, shipping and handling information on this tab.

PO Preview Tab

Prior to placing an order, click the **PO Preview** tab to see what the purchase order that will be generated from the current draft requisition will look like.

Comments Tab

The **Comments** tab is used to add details or request information about a record. It provides a way for approvers and document owners to communicate internally about a document. Users can select who should be notified about the comment through an email notification. They can also add internal attachments to the record from this tab.

Click ✚ to add a comment, click ↩ to reply to a comment, or click 🗑 to remove a comment. The number of comments included in the requisition appears on the tab. For example: Comments (1).

Comments added to purchase orders, receipts, or invoices associated with the requisition are also displayed here. Users can select an option from the **Show comments for** drop-down menu to filter for the comments added to specific documents.

In addition, comments that are added during the various actions listed below will also display on the Comments tab:

- Approve (when approving on behalf of another approver)

- Reject entire PR (within workflow)

- Reject Line Item(s)

- Draft Cart Assignment

- Assign

- Unassign

- Forward

- Place on Hold

- Expedite through workflow steps

- Unconsolidate a line item

- Bypass a workflow step

- Withdraw entire PR

- Withdraw line(s) on PR

- Return PR

Attachments Tab

Attachments on a requisition can be managed in this tab as well as on the Summary tab. They can be internal attachments, which are only visible to users within the application, or external attachments, which are visible to both users in the application and to suppliers. Any changes to made to attachments in this tab are also populated to the Summary tab.

The number of attachments included in the requisition appears on the tab. For example: Attachments (1).

To add an attachment, click **Add Internal Attachment** or **Add External Attachment** from the drop-down button in the top right corner of the panel. Click the actions icon ••• next to an attachment remove it, or to move it to the Internal Attachments or External Attachments section.

History Tab

Displays a record of all changes made to the document.

Populating Header Details

When creating a requisition, a user can add various details to the header information sections on the Summary tab. This provides users the ability to ensure that the requisition is handled appropriately.

Whenever possible, set up information about the requisition at the header-level and work by exception at the line-level. For example, if you are using the same accounting code for 6 out of 10 of the line items, we recommend you enter the "primary" code, then change the remaining 4.

Note: The sections and fields available at the header-level vary per organization.

1. Click the **Shopping Cart** button in the upper right corner to go to the active cart. (This step assumes you have one or more items in your shopping cart.)

2. Click the **Proceed to Checkout** button to enter the checkout process. The sections and fields displayed in the header will vary for each organization.

3. Complete header fields as needed. Click the edit 🖉 icon to enter or update fields in a section. Click the **Save** button to save the header information.

4. Once the header information is complete, update line item details as outlined in the section below.

Populating Line Item Details

All items that are being purchased are listed on the **Summary** tab of a requisition, in the **Items** section, grouped by supplier. For the items that are being purchased, various details such as the ship to address, accounting codes, and commodity codes are associated with each line item.
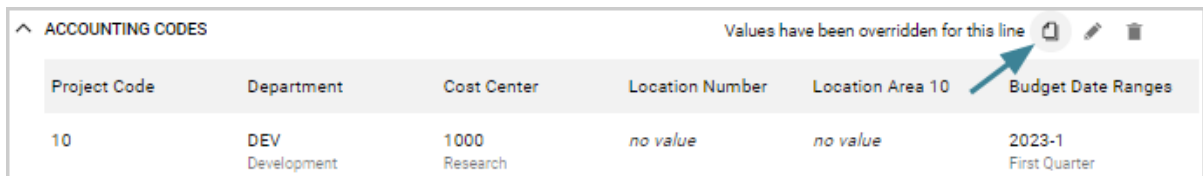
The information that is associated with a line item can come from different areas of the application. Some information associated with line items are populated from the header. For example, if accounting codes were selected at the header level, they are filtered down to the line level and applied to each line item. Other field values are based on organization setup or settings from a user's profile.

Users can modify the values – per line item – as needed, based on their user permissions and the application customization. This allows the user to ensure that each line item in the requisition has appropriate information associated with it. If field values on the header different for various line items, a note at the top of the requisition indicate that values vary by line.

Tip on making changes at line-level

- Whenever possible, set up the information about the requisition at the header-level and work by exception at the line-level. For example, if you are using the same accounting code for 6 out of 10 of the line items, we recommend you enter the "primary" code on the header, then change the codes on the remaining 4 line items.

- If information on the header, such as the Ship To or Bill To address, or account code custom fields, is different on a line item, a **Copy to other lines** link appears next to the field in the header and you can click it to populate all line items with the header values.

- After populating custom fields for a line, you can copy this information to additional lines by selecting the copy to other lines option.

View or Edit Line Item Details

1. Open a requisition at checkout. You can go to your active shopping cart requisition by clicking the **Shopping Cart** button in the upper right corner and then clicking **Proceed to Checkout**.

2. Make sure you are on the **Summary** tab.

3. *(optional)* If you only want to view only items, click the filter icon 👁 near the top right corner of the page and select **View Line Items Only**. Alternatively, you can collapse the header panels by clicking the ⌄ icon in the right corner of the appropriate panel.

4. Scroll down to the **Items** area of the screen. Requisition items are grouped by supplier in this section.

5. Choose one of these actions:

- *View line item details* - Click the ❤ icon next to **ITEM DETAILS** on a line item. It expands to show more information about the item, including the application data associated with the item, such as commodity codes. Most fields in this view are read-only.

- *View product details* - Click on the **product name**. The Product Details window displays additional product information.

- *View supplier information* - If you have the appropriate permissions, you can view supplier information by clicking on the **supplier name**.

- *Make any changes to a line item* - Click the edit icon 🖊 near the top right corner of a line item. The Edit Line window opens and the fields that can be changed are editable. Change values as needed and click **Save.Note:** Commodity codes may be searched via a drop-down box or by selecting from a list, depending on your organization's configuration. If a commodity code contains only one value, that value will be automatically populated.

- *Override information populated from the requisition header* - Some field values on line items are populated from the header. For example, if accounting codes were selected at the header level, they are filtered down to the line level and applied to each line item. If a line item needs to have a different value than the one on the header, you can override the header values at the line-level:

  - Click the actions icon ••• next to the line item and select an option underneath the **Override** menu, such as the Bill To or Ship To address, or Accounting Codes.

  - Make the required edits and save your changes.

  The information that has been changed is displayed on the line item underneath the ITEM DETAILS section, with a message indicating that "Values have been overridden for this line". Click the copy line icon 🗐 to copy the values that have been changed on this line to other lines, click the edit icon 🖊 to change the value, or click the remove icon 🗑 to delete the values applied to the line item and return to the values populated from the header.

PO Clauses

PO Clauses represent special conditions the supplier should reference regarding an order. Orders can contain one or more PO clauses, and they can appear at the header-level, line-level, and supplier-level on documents. They can be populated in these ways:

- PO clauses can be added to a document by default based on organization settings.

- They can automatically be added by the system based on an active PO clause rule.

- Users with the appropriate permission can manually add PO clauses to a document.

View PO Clauses

To view PO clauses, locate a **PO Clauses** field. Click the **View details** link (at the header or supplier level), or the **Add/View** link (at the line-level).

> **Note:** On requisitions, an information icon ⓘ indicates that the clause count in this field may not include clauses that may be applied due to clause rules.

Clauses added by organization default settings are listed first, then PO clauses added by a rule, followed by clauses that have been added manually.

Edit PO Clauses

On requisitions, PO clauses that have been added by organization defaults and PO clause rules cannot be removed.

Users with permission to modify PO clauses can manually add PO clauses. Click the **Edit** link next to a **PO Clauses** field, then select the checkbox next to the appropriate PO clauses and save changes.

On purchase orders, all PO clauses can be edited while a purchase order is in the approval workflow, including clauses added by a rule. They cannot be changed once a purchase order is complete.

Copy Account Codes to Other Lines

If account codes have been overridden on a line item in a cart, you can copy the account code selection to other lines on the cart, and choose which account code elements to copy from one line to other lines (or from the header to lines).

1. Go to a shopping cart with a multiple items.

2. Locate the **line item** with overridden account codes to copy account codes **FROM** and click the copy icon.

3. The **Copy To Other Lines: Account Codes** overlay opens. Account codes from the source line are displayed in the top section and the lines they can be copied TO are displayed in the bottom section. All account codes are selected by default and a green check ✓ is displayed next to them.

4. In the top section of the overlay, users can **un-check** the account codes they *don't* want to copy by clicking the green checkmark next to it to de-select it. A blank checkbox is displayed next to the account code. If an account code has a blank checkbox next to it, it will not be copied. If it has a green checkmark next to it, it will be copied.

5. In the bottom section of the overlay, users can **select the checkbox** next to each line that they want to copy the account codes **TO.**

6. Click **Copy**. All the accounting codes selected from the source line are copied to the selected lines.

> **Note:** The first time account codes are copied, an overlay will ask if you want to set the selection as your default. Select Yes if you want the same account codes to be selected each time you copy account codes, otherwise select No. If you select Yes, the overlay is only displayed again if your default account code selection is changed

Keep these things in mind when copying account codes:

- The copy merges the selected account codes with those on the destination line (rather than overriding them). If a value is unchecked on the line of origin, the destination line will keep the value it already had for that code.

- The system will check parent/child relationships on account codes to ensure the relationships are maintained.

    - If a user's selection is a child value, all parent and grandparent values are automatically selected.

    - If the parent is unselected, any selected children of that parent are also automatically unselected.

AI-Based Commodity Code Selection Recommendations

Organizations use commodity codes (classification codes for products and services) on PR lines to track and classify their spend through the procure-to-pay process.

If the AI-based JAGGAER Advise solution to facilitate the selection of commodity codes on PR and PO lines has been enabled for your organization, users are prompted with commodity code recommendations based on the item description and historical PO/PR line code assignments for similar items.

Select a Commodity Code Using an AI-Based Recommendation

If this feature is enabled, a **Commodity Code Recommendations** drop-down appears below the **Commodity Code** search box when users click into an empty **Commodity Code** search box.

Users can expand this drop-down to access a list of up to the top 5 codes that are most likely to match the item's commodity code. The commodity code recommendations are presented in descending order based on their relevance to the item, with the most relevant codes listed first.

When users select a code, the drop-down collapses and the **Commodity Code** field is populated with the selected code.

Select a Code for New Non-Catalog Items

1. Navigate to **Shopping** ▭ **> Non-Catalog** Item.

2. Enter a description in the **Description** field.

3. Click into the empty **Commodity Code** field. Recommendations are displayed the first time a user clicks into this field.

Note: Recommendations are not updated if the text in the **Description** field is changed.

Select a Code for eProcurement Forms

1. Navigate to the *Form Fields* page within an eProcurement form.

2. Fill in the **Unit Price**, **Quantity**, and **Product Description** fields.

3. Click the **Edit** button for the **Commodity Code** field.

4. The *Commodity Codes* search box appears. Recommendations are displayed at the top of this overlay.

Commodity Code Search ✕

Commodity Code Recommendations

Code	Description	
20001	Office supplies	＋
20002	Food Supply Services	＋
123344	Computer Equipment and Printers	＋

Code starts with...   Description contains...

Filter

Clear All Filters

〈 〉 Page [1] of 3   1-20 of 53 Results   20 Per Page ▼

Code	Description ↑	
20003		＋
20004		＋
20011		＋
20012		＋
20013		＋

Close

> **Notes:**
>
> • Unlike commodity code recommendations on carts and other documents, recommendations on forms do not display a drop-down list that is separate from the search overlay.
>
> • If the **Description** field is edited, click the **Edit** button for the Commodity Code field to refresh the recommendation list.
>
> • AI-based recommendations are available only at the line-level. Recommendations are not available for commodity codes at the header-level, which do not relate to a specific product description, unit price, and quantity.

5. Click the **Select** button to choose a recommendation from the list. The selected commodity code populates the **Commodity Code** field. When a form is completed, the selected recommendation is copied to the created cart.

Important Notes

- Once a commodity code is selected by either method, the **Commodity Code Recommendations** drop-down does not reappear when users click into the **Commodity Code** box. However, users can access the recommendations by clicking the magnifying glass icon 🔍 within the **Commodity Code** search box top open the *Commodity Code Search* pop-up window.

- Commodity Code recommendations are not supported when the **Commodity Code** field is configured as a drop-down list instead of a search box. If you are unable to access recommendations because your commodity codes are displayed in a drop-down list, please contact JAGGAER for assistance with your site configuration.

- Feedback on a selected code is returned to Advise to support machine learning and to help make future recommendations more accurate.

Select a Commodity Code Manually

Users have the option to reject the commodity code recommendations and perform a match manually using standard JAGGAER functionality.

- Click the magnifying glass icon 🔍 within the **Commodity Code** search box to access the familiar *Commodity Code Search* window where users can use pre-existing search functionality to locate and select a code.

- For users' convenience, Advise recommendations appear at the top of this page. Click a recommendation's **+** icon to select that commodity code.

Submit a Shopping Cart

The application validates the cart and checkout steps for proper completion of the requisition. Once the necessary steps are completed, the Assign Cart or Place Order button will be activated.

1. Click the **Shopping Cart** button in the upper right corner of the screen. The cart preview will display.

2. If you would like to review the cart before checking out click the **View My Cart** button. To proceed directly to checkout, click the **Checkout** button. The requisition will display.

> **Note:** If a custom field is configured to trigger a real-time ERP validation, the shopping cart submission button will be labeled **Validate with ERP and Place Order**.

3. If there are any errors or additional information required before the cart can be submitted, that information will display at the top of the right sidebar. Fix these errors as necessary.

4. Submit the order:

   - If your organization has budget check configured, the **Check Budget** button displays. Click the button to see if your order is within the budget limit before placing your order.

   - If your organization manages requisitions through the application, the **Assign Cart** button displays. Click the button to assign the cart to an approver.

   - If your organization manages requisitions outside of the application, the **Place Order** button displays. Click the button to send the order.

Requisitioners can submit their orders or orders assigned to them by a system shopper. By submitting a requisition, the order may begin the approval process or be sent to an outside system for processing. Sometimes this means sending the order to an external ERP system, starting the approval process, or creating and delivering a PO to a supplier. **Note:** Checkout will not occur until all system errors are corrected.

Review Cart Workflow

A visual representation of the workflow or approval process for a purchase requisition is provided. Each step in the process is listed and represents a manual approval step or an automated system step.

> **Note:** If any required fields are not complete, an error displays at the top of the sidebar asking the user to fill in the required information. The use cannot proceed to the next step until all required information is provided.

Suggestion: Once the Purchase Requisition workflow is complete, a purchase order is created. Additional approval steps may be required for the purchase order before it is sent to the supplier.

1. Open a requisition at checkout. You can go to your active shopping cart requisition by clicking the **Shopping Cart** button in the upper right corner and then clicking **Proceed to Checkout**.

2. Complete all required information for the requisition.

3. View workflow:

   a. The Purchase Requisition workflow is displayed under **What's next?** in the right-side panel. Expand or collapse the section using the ❯ and ❮ icons.

   b. In the Workflow section, users with the appropriate permissions can perform these actions:

      - Click the actions icon ••• next to **Workflow** to:

        - *View or print workflow steps* - Click **View Workflow** to view workflow steps. Click **Print approvals/workflow** to open a window that displays workflow steps with approval information with an option to download it in a printable format.

        - *Revert workflow steps*- Users with the appropriate permissions may also have the option to select **Revert workflow to a previous step** to return to a previous workflow step. In the pop-up window, click the **Select** button next to the workflow step that you want to revert TO. Enter a reason for reverting the step (required) and click **Revert**. The document returns to the selected workflow step and approvers on the step are notified that the document has been returned to them for approval. **Note:** If it is a parallel workflow step, the process needs to be repeated for *each* parallel step.

      - *Show skipped steps* - Slide the toggle next to **Show skipped steps** to display or hide workflow steps that will be skipped because they do not apply to this particular order.

      - *View approvers* - If a workflow step name is displayed in blue, click on the **step name** to view approvers assigned to a step. Click again to hide approver names.

      - *View additional information* - Click the actions icon ••• next to a step and select **View Workflow Inspector** to view additional information about the workflow step. The Workflow Inspector shows if rules configured for the workflow step are triggered and it also displays the rule evaluation. Users with the appropriate permission can select **Expedite** to skip to a future workflow step.

   c. If there is a workflow step that requires an approver to be assigned to it, such as a financial approval step, a message at the top of the right-sidebar will indicate that an approver is required and it will contain a link that when clicked, will allow you to add or update the approver information.

Assign and Review Carts

Overview

Some organizations set up different "levels" of users, where some of the users simply shop for items, but do not submit the cart. The **Assign Cart** function can be used to allow shoppers to submit orders to a requisitioner or approver for review, completion, and validation. For example, the original shopper may select the items, but the cart assignee is needed to enter the appropriate accounting codes.

Related Permissions

Permission	Description	Location
Assign Cart to Another User	Provides the ability to assign a shopping cart to another user. The permission activates a new button on the cart page to perform this function. The user can select from a list of users that have the Prepare Req for Another User permission.	Permission Settings > Shopping, Carts & Requisitions > Cart/Requisition

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Assign a Cart to a Requisitioner

In the first step of the "assign cart" process, the shopper adds items to their shopping cart, possibly fill out details about the order such as accounting codes and shipping addresses, then assigns the cart to an assignee. From there:

- The shopper can withdraw their order, which will allow the shopper to either hold the cart or re-assign it to a new assignee. For more information, refer the last step of the task below.

- The requisitioner can return the cart to the shopper with comments on "why" they returned the cart.

Note: It is assumed that the shopper has the **Assign Cart to Another User** permission enabled.

Assign a Cart

1. Add one or more items to your cart.

2. Click the **Shopping Cart** button in the top banner. The cart preview displays. Click the **View My Cart** button to access the full cart. You can also go to **Shop ⊡ > My Carts and Orders > Open My Active Shopping Cart** to view the active cart.

3. Populate the information that you know. Once the cart is ready to go, you can choose to assign the cart from the cart or you can click the Proceed to Checkout button and assign the cart from the checkout process.

4. Click the **Assign Cart** button in the cart or checkout. It is located next to the Proceed To Checkout button. The Assign Cart: User Search window opens.

5. Determine the assignee:

   - *If a preferred assignee is defined in the user's profile* - Click **SELECT** and choose the preferred assignee. The users available for selection as assignees can be defined by an administrator or the user if the user has the **Edit User's Cart Assignees** permission.

   - *If the assignee is not predefined* - Click **SEARCH** and select a user from a list of available assignees. In order to be listed as an assignee, the user must have the **Prepare Req for Another User** permission.

   > **Note:** In order to search for an assignee, the user must have both the **Edit My Profile** and **Edit User's Cart Assignees** permission.

6. **OPTIONAL:** Enter a note to the assignee, perhaps describing the items requested, how the items were selected, or any other information about the order.

7. Click **Assign**. A shopping cart notification displays.

8. To view assigned carts, navigate to **Shop ⊡ > My Carts and Orders > View Carts**, then click the **Assigned Carts** tab. Assigned carts are listed in rows.

   - Click the **shopping cart name** to view details of the cart that was assigned.

Review a Cart Assigned to Me

Some organizations use the assign cart function to allow shoppers to submit orders to a requisitioner or approver for review, completion, and validation. For example, the original shopper may select the items, but the cart assignee is needed to enter the appropriate accounting codes.

This task focuses on the second part of the "assign cart" process where the shopper has already submitted the cart and it is awaiting review by the assignee (the user in this task).

- In order to be an assignee, the **Prepare Req for Another User** permission must be enabled.

- It is recommended that assignees enable the **Cart Assigned Notice** notification in their profile (**Profile > User Settings > Notification Preferences > Cart Assigned Notice**).

Review an Assigned Cart

1. Once the shopper's cart is submitted, the assignee should receive an email if the notification listed above is enabled. There are two additional ways that an assignee can find about any orders requiring review:

    - Click on the **Action Items** in the top banner and select "**Carts assigned to me**".

    - Navigate to **Shop** **> My Carts and Orders > View Carts**. Click on the **Assigned Carts** tab and locate the cart assigned to you in the list.

2. Click on the shopping cart name to review the order. Standard cart changes, such as removing or adding line items and changing quantities, is allowed.

3. Once open, the requisitioner has the option to return the cart back to the shopper. This is important if you need more information from the shopper or if the wrong requisitioner was accidentally selected. This option is found in the upper right-hand corner in the drop-down box.

    Caution! The Delete button will delete the cart from the system and the original requester will no longer be able to access the order.

4. Once all required fields are completed and the order reviewed, it can be submitted as normal.

Assign a Substitute Requisitioner

When a cart is assigned to an assignee, or requester, the cart must be submitted in order for processing to begin. If a requester is on vacation or leave, they can assign a **substitute** requisitioner to assist with the cart submission. The substitute is able to review the cart assigned to the original assignee.

When a cart is reassigned to a substitute requester, the original shopper will be notified via email.

Assign a Substitute Assignee

Assigning a substitute assignee for processing assigned carts can be set up for a short period (a few hours) or a lengthy period (for example, extended leave).

1. Go to **Shop** ▣ **> My Carts and Orders > View Carts**.

2. Click on the **Assigned Carts** tab.

3. Click the **Assign Substitute** link near the top left corner of the page.

4. From the **User Search** window, enter the criteria to find the user that you would like to assign as the substitute requester. Once the user criteria are entered, click the **Search** button.

5. Select the appropriate user using the **[select]** link to the right of the user's name.

6. Click **End Substitution** button on the draft carts to remove the substitution setting.

Entering Tax, Shipping & Handling Information

Overview

The **Taxes/S&H** tab displays the tax, shipping and handling charges that are associated with each line item on a requisition. Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Users with the **Allow editing of Tax, Shipping, and Handling** permission can edit this information on a document, per line item, as needed.

If **user-defined tax codes** are configured for your organization, users with the appropriate permission can select a user-defined tax code from a specifically configured custom field (i.e., such as Tax Codes) on shopping carts, purchase requisitions, purchase orders and invoices, and the associated tax rate is applied to the **Tax1** field. If **tax calculation rules** are configured for your organization, the application will apply the tax code / tax rate as determined by the tax calculation rule to the **Tax1** field where appropriate. See Apply User-Defined Tax Codes below for more information.

Related Permissions

- Users with the **Allow editing of Tax, Shipping, and Handling** permission can edit tax, shipping and handling information on a document.

- Users who can apply user-defined tax codes require the **View Personal List** permission for the custom field (i.e., the Tax Code field) associated with the user-defined tax codes to see the field and select user-defined tax codes.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Enter Tax, Shipping and Handling Charges

Follow these steps to populate tax, shipping and handling charges for single or multiple line items in a requisition before placing the order.

1. Open the requisition you want to adjust. You can go to your active shopping cart requisition by clicking the **Shopping Cart** button in the upper right corner and then clicking **Proceed to Checkout**.

2. Click the **Taxes/S&H** tab. This area displays all line items in the requisition, grouped by supplier. For each group of line items and for each line item, taxes and any shipping and handling charges are displayed along with an edit icon ✎.

3. Choose one:

- *To edit tax, shipping or handling charges for all lines in a supplier group* - Click the edit icon 🖉 next to the appropriate supplier group. A note at the top of the page displays **EDIT TAXES/S&H FOR ALL LINES IN THIS GROUP**. Changes to the tax, shipping and handling charges will be applied to all line items within the supplier group.

- *To edit tax, shipping or handling charges for an individual line item* - Click the edit icon 🖉 next to the line item you want to change. Updates will be applied to that line item.

4. Default settings for tax, shipping and handling charges are automatically displayed in each of these fields. To make the desired changes, select **override** from the drop-down menu next to a field and enter a value in the field that opens for editing. You can re-select **use default** to return to the default setting:

- **Tax1** - This field is used for first tax line and has to be turned on in the supplier details section.

- **Tax2** - This field is used for second tax line and has to be turned on in the supplier details section.

- **Shipping** - This field is used for shipping charges and has to be turned on in the supplier details section.

- **Handling** - This field is used for handling charges and has to be turned on in the supplier details section.

5. For organizations with user-defined tax codes, if a user has permission to edit tax information, an **Override Tax Engine Tax** checkbox on the **Edit tax, shipping and handling overlay** on requisitions tells the system to use the manually entered override rate when the tax engine runs, rather than letting the tax engine reset the tax rate.

    a. In the Edit tax, shipping and handling window, select the **override** option in the **Tax1** field, then enter the override tax rate.

    b. Click the **Override Tax Engine Tax** checkbox to keep the manually entered override rate when the tax engine runs, rather than letting the tax engine reset the tax rate based on tax calculation rules. If the checkbox is *not* selected and there is a match to the tax code rules, the manually entered tax rate will be replaced by the one applied by the tax engine.

6. Click ✓ to save changes. Select ✕ to cancel changes.

Apply User-Defined Tax Codes

Organizations can create user-defined tax codes and make them available for use on shopping carts, purchase requisitions, purchase orders and invoices. They can be used in cases where, for example, a vendor is located in an area where different tax rates apply. Users can select the

appropriate user-defined tax code from a Tax Code custom field and it will be applied to line items in the document. It can be selected at the header-level and at the line-level.

If **user-defined tax codes** are configured for your organization, users with the appropriate permission can select a user-defined tax code from a specifically configured custom field (i.e., such as Tax Codes) on shopping carts, purchase requisitions, purchase orders and invoices, and the associated tax rate is applied to the **Tax1** field.

> **Important Note:** Each customer is responsible for knowing the tax laws for their region and configuring the appropriate tax rules and tax rates. JAGGAER is not responsible for any tax miscalculation due to incorrect rates or determination rules being defined by the customer.

Users who can apply user-defined tax codes require the **View Personal List** permission for the custom field (i.e., the Tax Code field) associated with the user-defined tax codes to see the field and select user-defined tax codes.

How Does It Work?

When a user-defined tax code is selected, the associated tax rate is applied to the **Tax1** field as follows:

- On shopping carts, requisitions and purchase orders, the Tax1 field is recalculated and the user-defined tax rate replaces any default tax settings. The tax rate is displayed as a percentage, along with the total calculated amount of tax for the item. The re-calculated value is displayed everywhere the Tax1 field is displayed, i.e., General, Shipping, Billing, Notes and Attachments, Codes, Review pages, etc.

- On the Taxes/S&H tab, the Tax1 field on taxable items will display the adjusted rates and corresponding tax values. In this tab, **(overridden)** is displayed next to the Tax1 field if a line item has overridden the setting populated from the header.

- On invoices, a user-defined tax code can be selected, but the totals in the Tax1 field are not re-calculated.

Where is the Custom Field Displayed?

Organizations determine which custom field contains the user-defined tax codes, so the name of the field is specific to your organization. They also set where the tax code custom field is displayed on shopping carts, requisitions, purchase orders and invoices.

- If a user-defined tax code is selected at the header level, all lines inherit the selected tax codes and the associated rates are applied to the Tax 1 field.

- Rates inherited from the header can be overridden on individual line items.

- If commodity codes have been mapped to the user-defined tax code custom field, when a linked commodity code is selected, the associated tax rate is applied to the Tax1 field and overrides the Tax1 default settings.

Tax Calculation Rules for User-Defined Tax Codes

If **tax calculation rules** are configured for your organization, user-defined tax codes may be applied by the system based on pre-configured tax calculation rules. In this case, the system will check requisitions, purchase orders, and invoices for values defined on tax calculation rules. If it finds a match, it will apply the tax rate from the user-defined tax code associated with the rule to the document.

If there is a match to a tax rule, users will see the tax rates that have been applied in the Tax 1 field as follows:

- **On PRs and POs** - In the **Taxes/S&H** section, the **Tax1** field displays "(overridden)" on line items where tax rates have been applied because there is a match to a tax rule. The **tax amount** in the Tax1 field becomes a clickable link on each taxable line. Users can click the link to open the Tax Details overlay and review tax information.

- **On Invoices** - In the **Discount, Tax, Shipping & Handling** section, users must first click the **Calculate** button at the header level to manually initiate the tax engine. The system will calculate the tax rate and amount based on the tax rules. Then what happens depends on your organization settings:

If tax validation is not configured for your organization (default setting)

- The system will **automatically update** the document. Users can click the **Review** button in the DTSH section on the Summary tab to open the Tax Details tab to view and edit tax information.

- In the Tax Details tab, users can edit current values for either the **Tax Code** or **Tax Amount** by clicking the edit icon ✎ next to the field. Select or enter a value and click **Save**. If the OVERRIDE ENGINE TAX checkbox is selected, this designates the line as overridden and prevents the tax engine from running against that line going forward. If it is not selected, the tax engine values will override the entered values the next time it is run.
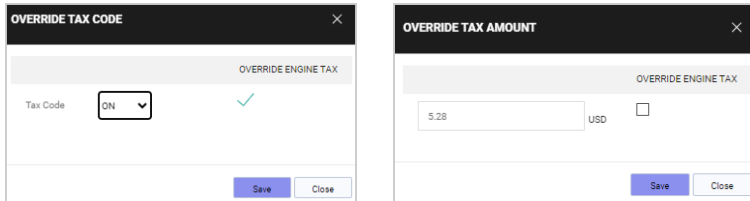
If tax validation is configured for your organization

- The tax engine checks if there is a discrepancy between the **current tax** on the invoice and the tax engine calculated amount. If there is a discrepancy, the **tax engine will not override taxes without review**. A message indicates if tax engine amounts have not been applied because there is a discrepancy.

- In this case the Tax Code, Tax Rate and Tax Amount columns show the tax values suggested by the tax engine. **Users can select the checkbox** next to a line to apply the tax engine recommended values. If the checkbox is selected, the tax engine calculated values are highlighted in green to indicate that these values will be applied to the invoice line.

> **Note:** If a user does not manually initiate the tax calculation by clicking the Calculate button, the invoice workflow robot will start the process when it reaches the Calculate Tax workflow step. It also runs when any fiscal data is updated on the invoice. After the tax engine has run, the button changes to Review . Warnings are displayed if there are differences between the initial taxes entered on the invoice and the ones calculated by the tax engine.

Budget and ERP Validation

Overview

These validation options can be set up by an organization to help verify an order before it is sent for approval:

- **Budget Validation** - Your organization may require that shoppers perform a budget check before placing an order. This can help to prevent going over budget on spend for specific account codes.

- **ERP Validation** - If your organization has activated the custom field validation with ERP feature, some custom fields may require validation from the ERP system before processing orders. This helps to identify errors in the order as soon as they occur.

Related Permissions

Permission	Location
Expedite requisition through all workflow steps	Permissions Settings > Approvals > Requisition Approvals

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Performing a Budget Validation During Checkout

Your organization may require that shoppers perform a budget check before placing an order. This can help to prevent going over budget on spend for specific account codes.

1. If the budget checking is set up for your organization, there will be a **Check Budget** option as shown below.

2. If the **Place Order** button is not active, it will remain in this state until you have performed the budget check. **Important Note:** If your order does not contain account codes that are marked as required, the Place Order button will be active. You can still validate the budget but the action is not required to place the order.

3. Click the **Check Budget** button. This will trigger a request to your ERP. **Note:** A message displays that the ERP is being contacted. Another message displays that a response is being returned.

> **Note:** If your organization has the Budget Manager solution enabled, clicking Check Budget will check the budget in Budget Manager and does not trigger a request to your ERP.

4. One of the following scenarios will occur:

   - The ERP will approve the budget. A message displays; **Your order has passed the budget check**. The Place Order button becomes active and you can place your order.

   - The ERP will not approve the budget. A message displays; **Your order has not passed the budget check** and the Place Order button remains disabled. Click on the **View Details** link for information about why the budget validation is not approved. Make any corrections based on this information and re-run the budget check.

- If there is a connection or timeout error while contacting the ERP, you will receive a message. Try your budget check again or contact your system administrator if the errors continue.

Changes to the Order

If you make changes to the order that might affect the outcome of a budget check (such as adding or removing items or updating account code values), the Validation section will display a message indicating that the details of your order have changed and request that you check your budget. The Place Order button will be disabled again until you perform another ERP validation.

Validate With ERP (Custom Field Validation)

If your organization has activated the custom field validation with ERP feature, some custom fields may require validation from the ERP system before processing orders. This helps to identify errors in the order as soon as they occur.

How It Works

If your organization has activated this feature and there is a custom field that is configured to trigger an ERP validation, the shopping cart submission button will be changed to **Validate With ERP And Place Order**.
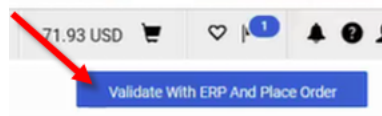
When you click this button, the system begins a connection to the ERP. A PR validation is run and messages are displayed to inform you of the status of the validation process.
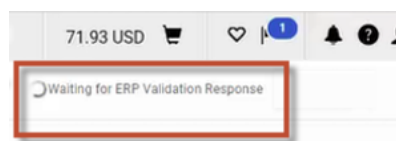
If validation passes, the order is submitted into workflow. If validation fails, the PR must be updated and resubmitted for validation.
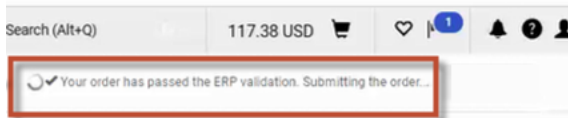
Pass:

Fail:
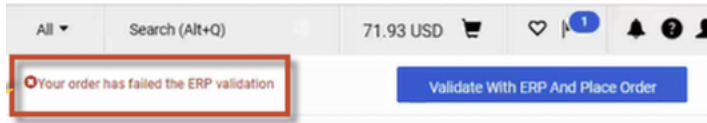
After a PR enters workflow, if changes are made to any of the custom fields that have been configured to trigger real-time validation, you will be prompted to resubmit the PR for a validation check. If validation passes, the order will continue moving through workflow. If validation fails, the PR must be updated and resubmitted for validation.

> **Note:** If an approver has the **Expedite requisition through all workflow steps** permission, they will see one of the following buttons in the validation popup: a **Submit Order** button on draft carts, a **Submit Request** button on draft change requests, or a **Skip ERP Validation and Continue** button during workflow. When the button is clicked, the document will be approved regardless of whether it meets the validation requirements.

Information about validation checks is documented in the PR **History** area.

Ad-Hoc Approvals for Draft Carts

Overview

The ad-hoc approver feature is used to accommodate situations where a one-time approval is needed from a user who is not in the regular approval workflow.

If your organization has enabled ad-hoc approvals for draft carts, users with the appropriate permission can assign an ad-hoc approver to their draft requisition or change request prior to submitting it for approval. They can also specify where in the requisition workflow that the approval takes place.

Related Permissions

Permission	Description	Location
Add Ad-hoc approver to draft Cart	Users with this permission can assign an ad-hoc approver to their draft requisition or change request prior to submission and specify where in the requisition workflow that the ad-hoc approval should take place.	Permission Settings > Shopping Carts & Requisitions > Cart/Requisition
Perform Requisition Ad-Hoc Approvals	The users who can be selected as ad-hoc approvers on the step must have this permission.	Permission Settings > Approvals> Requisition Approvals

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Users with the **PR pending Ad-Hoc Workflow approval** (Notification Preferences > Shopping, Carts & Requisitions) notification enabled will receive a notice when the requisition workflow reaches a draft ad-hoc approval step.

Assign a Draft Requisition or Change Request to an Ad-hoc Approver

1. Open a draft requisition or draft change request.

2. Locate the **Ad-Hoc Approver** field and click **select**. The Ad-Hoc Approver overlay opens.

3. Complete these fields in the **Ad-Hoc Approver** window:

   - **After Step** (required) - Select the workflow step *after* which the ad-hoc approval takes place. The drop-down menu lists all steps in the requisition workflow.

   - **Ad-Hoc Approver** (required) - Search for and select the approver for the step. Only one ad-hoc approver can be selected for a workflow step. Only users with the **Perform Requisition Ad-Hoc Approvals** permission (Permission Settings > Approvals > Requisition Approvals) can be selected in this field. The ad-hoc approver can be changed before the requisition or change request is submitted before approval.

   - **Comments** (optional) - Enter comments for the ad-hoc approver. Comments entered here are also displayed on the Comments tab of the requisition.

4. Click **Save**. Once Save is clicked the Ad-Hoc approval step is displayed in the right sidebar after the selected workflow step. Click on the workflow step name to see the ad-hoc approver.
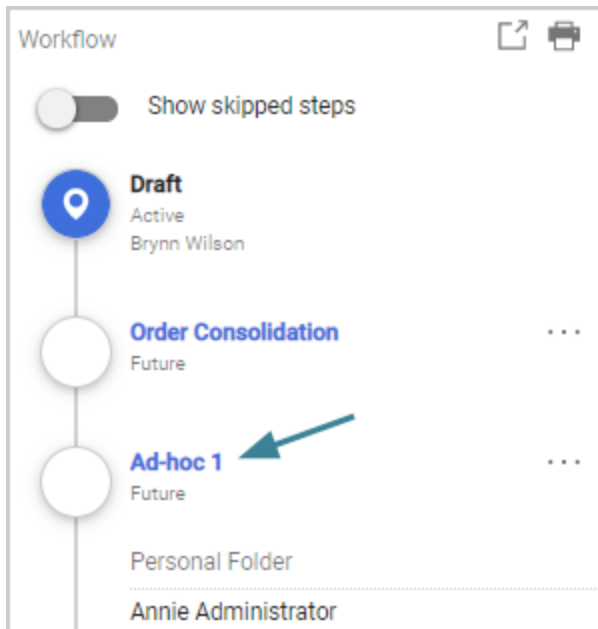
5. Submit the requisition or change request for approval. Once it is submitted to workflow, the ad-hoc step will be part of the approval workflow and assigned to the approver selected.

Approve a Requisition or Change Request as an Ad-Hoc Approver

If you have been assigned to approve a requisition or change request as an ad-hoc approver, you can find the requisition or change request assigned to you for approval in your My Approvals folder, or by clicking the email link in the notification you have received, which will take you directly to the requisition to be approved.

You need the **Perform Requisition Ad-Hoc Approvals** permission (Permission Settings > Approvals> Requisition Approvals) to perform this task.

Users with the existing **PR pending Ad-Hoc Workflow approval** (Notification Preferences > Shopping, Carts & Requisitions) notification enabled will receive a notice when the requisition workflow reaches a draft ad-hoc approval step.

1. Open the **requisition** that has been assigned to you for approval from your **My Approvals** folder (Orders > Approvals > Requisitions to Approve), or click the email link in the notification you have received.

2. Review the information.

3. Select **Approve** to approve the requisition and send it to the next workflow step.

> **Note:** If you have multiple documents to approve, the **Approve & Next** button is displayed by default. If you want to approve the open document only, click the drop down icon next to the button and select **Approve**.

Order Approval

The Approval Process

Overview

Requisition and Order Approval

Before an order can be completed, it will generally have to go through an approval process. In this process, requisitions and purchase orders are assigned to one or more approvers via steps in the workflow process. Approvers review the document and approve or reject line items or the order as a whole.

About Workflow

The workflow process begins when a cart is submitted and continues through when the purchase order is sent out to the supplier. The goal of workflow is to make sure that all orders sent out are valid. For example, workflow may involve financial approvals. In other cases, it may verify that the certain types of items (such as radioactive or other hazardous items) are not ordered through the system. Certain organizations require the purchasing department to approve all orders sent out, while other organizations may have departmental-approval only or special handling based on line item or total amounts.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Requisition and Purchase Order Approval Basics

- The term **approver** is used to describe someone who is responsible for reviewing and evaluating purchase orders and purchase requisitions. The term approver is also used to describe someone who has the ability to view departmental or organization-wide order history. Approvers consist of departmental approvers, buyers, and more.

- In order to approve requisitions, you must have the appropriate approval permissions. Permissions are granted through role assignment or individual permissions being granted by a system administrator. If the ad-hoc approver feature is enabled for your organization,

a user who has been designated as an ad-hoc approver can review and approve a requisition before it continues to the next step in the approval workflow. Assigning a user approver permissions will not automatically allow the user to perform approval-related tasks. Before an approver can perform approval-related tasks, he or she must be assigned to the appropriate shared workflow folder, be set up as a financial approver or a dynamic approver, or be designated as an ad-hoc approver.

- Approvers can choose whether or not to receive notification when an order requiring approval lands in their "queue." This is set up via the user's profile.

- There are two types of approvals: 1) Manual approvals, requiring human intervention, and 2) System approval, which is automatic.

- An entire requisition or purchase order can be approved or one or more line items can be rejected. If part of a document is rejected (one or more line items), the remaining line items continue in the process.

- If changes are made to any of the custom fields that have been configured to trigger real-time validation with a customer's ERP, the user will be prompted to resubmit the PR for a validation check. If validation passes, the order will continue moving through workflow. If validation fails, the PR must be updated and resubmitted for validation.

- Comments and attachments can be sent "back and forth" between requisitioners, purchase order owners and approvers during the approval process.

- Requisitions and purchase orders can be returned from an external ERP system, including Banner, to the requisitioner for updates and re-processing. Additionally, requisitions can be marked as approved or rejected from the third-party system.

- If a line item or the entire document is rejected (by an individual or the system), the rejection notice will show up in document History. If the user is set up to receive notifications for rejections, they will receive an email also. This email contains the rejection note entered by the approver.

- Some types of approval are directed at a single individual and no one else can approve the order (unless a substitute is set up or the order forwarded). Examples of this are for financial approvals or "reports to" approvals.

- Other approval queues can be assigned to multiple approvers. As an organization or department, you can determine how the approvals are handled. For example, you may have a primary approver and someone else may be assigned as a back-up approver OR two people can be assigned to the queue and each individual "takes" orders as their schedule allows. Examples of this type of setup include shared workflow folders, form approval, and more.

- If the ad-hoc approver feature is enabled for your organization, users who are approving a purchase requisition can send it to another user for approval. The person selected as an ad-hoc approver can review and approve requisition before it continues to the next step in the approval workflow. This can be used for situations when a one-time approval is needed from a user who is not in the regular approval workflow.

Viewing Approvers from a Requisition or Purchase Order

When working with pending carts, purchase requisitions and purchase orders, users have the opportunity to see who is responsible for the approval of all manual approval steps. Additionally, user's email addresses are provided if the user is interested in corresponding to the approver.

A list of potential approvers (one or more) is provided when working in the cart and after the cart is submitted as long as the workflow document (PR/PO/Invoice) is not completed (i.e., pending). Only active users are displayed in this list.

1. **Open the document**.

2. Go to the right-side panel. The approval workflow is displayed in vertical steps under the **What's Next?** heading.

3. On an **active workflow step** (the workflow step name is displayed in **blue**), click directly on the name to view approvers assigned to the step. Click again to hide approvers.
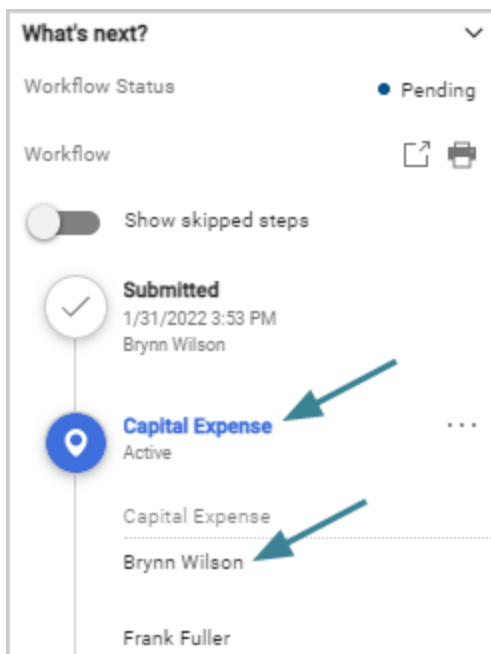
Accessing Requisitions and Purchase Orders for Approval

All approval documents are accessed from the **Approvals** page. There are several ways to find documents that are waiting for approval:

- From the left menu, go to **Orders** ⬚ **> Approvals** and select **Requisitions to Approve** or **Purchase Orders to Approve**.
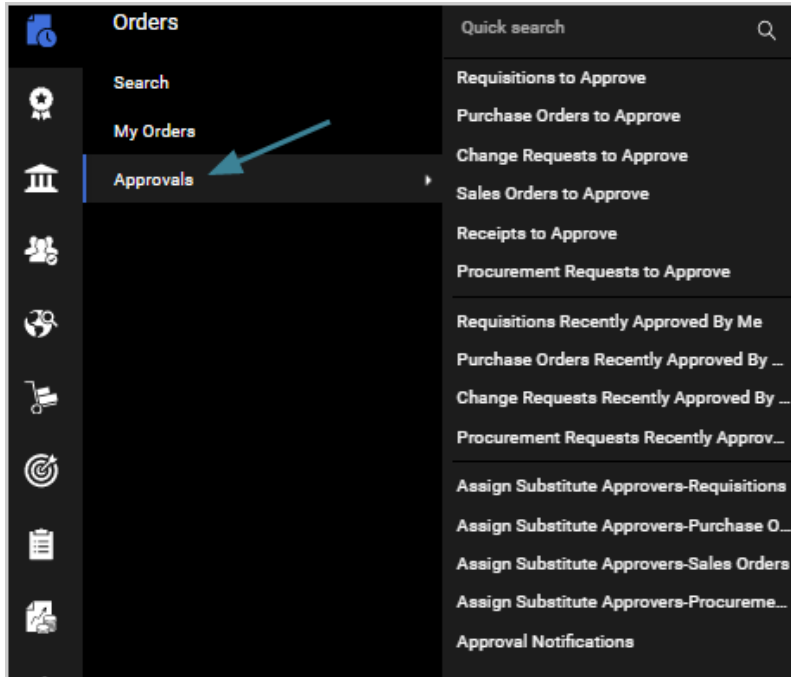
- Alternately, you can access the documents through the **Action Items** option in the top banner navigation. Select the appropriate link under **My Assigned Approvals**. The **Approvals** page displays.
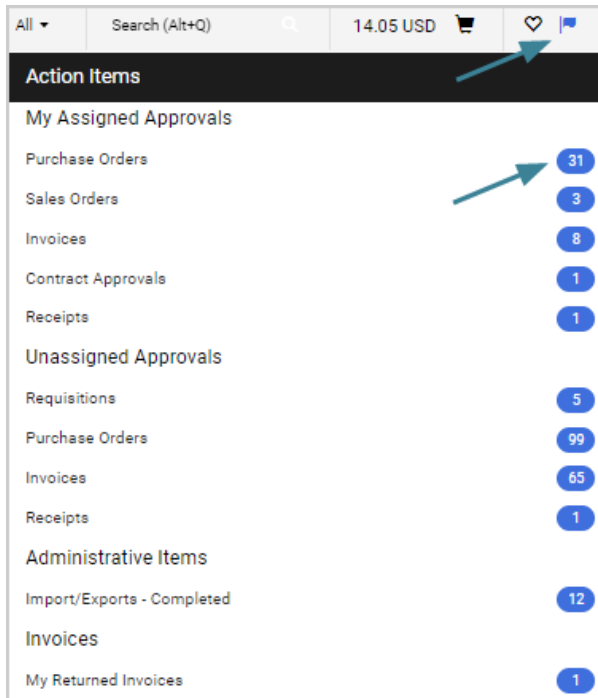
- Requisition and Purchase order approvals can be done via email if the organization and user are configured appropriately.

- Requisition and purchase order approvals can be done via the Mobile App if the organization configuration settings and user permissions allow.

The Approvals Page

Documents in the approval workflow can be accessed from the **Approvals** page. From this screen you can access and approve all documents that require your approval. There are several display, filtering, and action options to help you locate and manage the documents for approval.

Document Types

- Click a **tab** near the top of the page to access documents that are waiting to be approved in different areas of the application. A counter next to a tab title indicates the number of documents with pending approvals for that area. The available document types will depend on your organization's setup and your individual permissions.

Filter, View and Sort Options

- In the left sidebar:

  - Use the **Your Selections** section to select a **date range** or **view approvals for** another person.

  - Use the **Filters** section to apply additional filters to limit your search. Click a **name** in a filter to filter documents by that selection. Click the **Select Multiple** link to apply multiple filters. Selected filters are displayed under **Your Selections** and the filter option is no longer displayed under Filters. Click the X next to a filter to remove it.

  - Click the expand ⇥| or collapse |⇤ icons to show or hide the left sidebar. On narrow screens, the left menu can be accessed by clicking the show filters icon ▼ at the top of the screen.

- The **Filter view** icon 👁 at the top of the page controls how records are displayed. By default documents are displayed as a list. Click the icon to select additional view options. If an option is selected, the icon is blue 👁 and users can hover over the icon to see the view options currently selected:

  - **View Details** - Each line is expanded to shows details for each document.

  - **Group Results by Folders** - Displays folders in alphabetical order with your approvals folder always appearing at the top of the folder list (unless there are no documents in your approvals folder). If this option is selected, additional **Expand All** and **Collapse All** options are displayed in the drop-down. You can also click within a folder row to expand or collapse a list.

  - **Compact View** - - Displays the records with condensed spacing so that more records are displayed on the page.

- **Sort** records using the drop-down menu near the top right corner of the page.

Actions

- The **Actions Menu** opens in a pop-up window near the bottom of the page when documents are selected. **Select the checkbox** next to each record you want to perform an action on, then select the appropriate action from the drop-down menu.

- Click an icon next to a single document to perform these actions:

  - Click a **document number** to open and view the document.

  - If an **attachments** icon 📎 is displayed, click the icon to open the Attachments tab of a document.

  - Click the **quick view** icon ⬀ next to an item to view a printer-friendly version of a document.

  - Click the **assign** icon 👤 to assign a document to yourself. If the icon is gray 👤, the document has already been assigned to an approver.

  - If an Approve button is displayed, click the button to approve the document.

Details for Reviewing Documents

- When a document is in your personal folder (My PR Approvals, My PO Approvals, etc. depending on which document type tab you are on), the approver owns it. Only an administrator can move a document out of this folder. Documents can automatically be placed in the folder for financial workflow or moved from a shared workflow folder and into your personal folder. When an order is moved from a shared folder to another user's folder, the approver is indicated to all users who view the shared folder.

- **Shared workflow folders** are folders that can be accessed by one or more approvers. In some cases, there will only be one approver per folder, but more can be set up if needed. The actual folders that display for an approver is dependent on what they are responsible for approving. Therefore, an approver might see one, two, or twenty folders.

- To move multiple documents to your folder, click the checkbox to the left of each document, then select **Assign** from the drop down menu near the bottom of the page.

- The sort order for documents is remembered when an approver leaves the screen and returns. This affects all workflow queues that the user has access to. For example, if you are responsible for approving orders for three different account codes, you might choose to sort them by department. The next time you log in to approve an order, your sort preference will be remembered.

Assigning Requisition and Purchase Order Documents to Your Approvals Folder

Some requisitions and orders requiring review automatically go to your approvals folder. If an approval step CAN be shared by more than one person, the document must be assigned to the approver before it is reviewed, updated, etc. By placing the pending document in your approval folder, it signifies that the approver is responsible for the current step of workflow for the item(s). If multiple approvers are assigned access to a folder, then, by moving an item into the **Approvals** folder, the approver is indicating their intent to review (approve or reject) the document.

Note: Requisitions that require financial approval by a specific approver will be placed automatically in the **Approvals** folder.

1. Access the **Approvals** screen.

2. Locate unassigned documents you would like to review for approval by filtering on **Not Assigned** documents, or by viewing the assign icon next to documents (unassigned, assigned).

3. To **move a single document** to your approval folder:

    a. Click the **Assign** icon ⚒. You will be asked to confirm that you would like to move the document.

    b. If the document is currently in multiple folders, you will be asked if you would like to apply the move to all folders or just to the one from which you accessed the document. Click the appropriate action. The document will be moved to your approval folder.

4. To **move multiple documents** to your approval folder:

    a. **Select** the checkbox next to the documents that you would like to assign to your approvals folder.

    b. After you have selected which documents to assign, select the **Assign** option from the drop-down menu near the bottom of the page.

    c. If a document is currently in multiple folders, you will be asked if you would like to apply the move to all folders or just to the one from which you accessed the document. Click the appropriate action. All selected documents will be moved to your folder.

5. After you have moved the document(s) to your approvals folder, the next step is to review the document for processing.

Viewing Orders that you have Approved or Rejected

You can view orders that you have approved or rejected previously. This feature allows approvers to quickly have a snapshot of what requisitions and/or orders they have processed.

1. Go to **Orders** 🕘 **> Approvals >** *[Document Type]* **Recently Approved By Me**.

2. **Refine and filter the displayed documents**. There are several options to narrow down the documents that are being displayed.

    Refine or save your search results, or initiate actions, by applying one or more of these options:

    - **Open a record** - Click a **record number** to open it.
    - **Select filters**
        - Click **Add Filter** to see a list of filters that can be applied to the search results. Click the checkbox next to a filter to apply it. Click the **Clear All Filters** button to remove all filters and start again.

- Access **Quick Filters** and **My Searches** in the side panel by clicking the ≡ icon in the top left corner of the page. Quick Filters allow you to easily apply filters to the search results. The My Searches tab contains your saved searches. Select the toggle again to hide the side panel.
- **Define a date range** - The default search shows documents created in the last 90 days. Click the **Date** field in the top left corner of the page to enter a different date range. You will see these options:
    - Select **All** to view all records. We recommend adding filters to limit your search results.
    - Select **Within** to choose from a list of date ranges.
    - Select **Between** to enter a specific date range.
    - Select the **more options** link to look for documents with dates that are missing.
- **Actions** - Action ••• icons are displayed to the left of records in the search results if you have the appropriate permissions. You can initiate an action for a single record or for multiple records at once.
    - **Single records** - Click the action ••• icon next to a record and select an action from the drop-down menu.
    - **Multiple records** - The action ••• icon in the column header works as a toggle to show or hide the multiple selection option. First, click the ••• icon in the column header and select **Show Multiple Selection**. Checkboxes are displayed next to each record. Select the checkbox next to each record you want to initiate the action for, then click the action ••• icon a second time and select an action from the drop down menu. Select **Hide Multiple Selection** from the menu to return to row selection.
- **Save search as a favorite** - Click the **Save As** icon at the top of the page to save your search as a favorite. Additional options are available from the drop down menu.
- **Pin filters and columns** - Select the **Pin Filters** icon at the top of the page and then select **Pin Filters** or **Pin Columns** to save settings and they will be selected by default the next time you access the page.
- **Configure columns** - Click the configure columns ⚙ icon to choose which columns are displayed in the search results. The overlay shows a list of columns related to the area that you are in, and you can choose which ones you want to display or hide on the search results page.
- **Sort columns** - Click the sort ▼▲ icons on a column heading to sort data in ascending or descending order.
- **Export search results** - Click the **Export All** icon at the top of the page to export the filtered search in a format that you can use for reporting. See "Exporting Document Searches" in the **Site Essentials Handbook** or online searchable help.

Approval Actions for Requisitions and Purchase Orders

Overview

Approvers of a requisition or purchase order review the document and in most cases, can return, reject or approve the document or line items on the document. Depending on organization setup and user permissions, approvers may also be able to:

- Manage comments.

- Edit a discount.

- Assign a substitute approver if an approver is absent or unavailable.

- If the Requisition Ad-Hoc Approver feature is configured for your organization, send a requisition to a user who is not in the regular workflow for a one-time approval.

- Expedite workflow.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

View Approvers for a Requisition or Purchase Order

When working with pending carts, purchase requisitions and purchase orders, users have the opportunity to see who is responsible for the approval of all manual approval steps. Additionally, user's email addresses are provided if the user is interested in corresponding to the approver.

A list of potential approvers (one or more) is provided when working in the cart and after the cart is submitted – as long as the workflow document (PR/PO/Invoice) is not completed (i.e., pending). Only active users are displayed in this list.

1. **Open the document**. In this example, an un-submitted cart is being reviewed.

2. Go to the right-side panel. The approval workflow is displayed in vertical steps under the **What's Next?** heading.

3. On an **active workflow step** (the workflow step name is displayed in blue), click directly on the name to view approvers assigned to the step. Click again to hide approvers.

Return a Requisition to the Requisitioner during the Approval Process

Occasionally, an approver may want to return a requisition to the original shopper or requester for updates to custom fields or line details. This task allows approvers to return instead of rejecting a purchase requisition. When a requisition is returned it becomes a draft cart and is no longer visible as a requisition (via history, etc.). The returned requisition can be updated by the requisitioner and resubmitted into workflow and all previous approval information and comments will be available via History. The returned requisition will restart workflow from the beginning regardless of the step it was returned from.

Additional Details

- Approvers that have the ability to Reject requisitions can also Return requisitions.
- Requisitions can be returned at any point in the requisition approval process.
- When a requisition is returned it becomes a draft cart and is no longer visible as a requisition. **Changes made to the requisition while in a draft cart will be recorded in history.**
- End users will have access to view returned requisitions from their homepage and in a new section in the Draft Carts tab called "my returned requisitions". **End users will not be able to delete returned requisitions; however they can choose to withdraw them.**
- Approvers will see a new indication of resubmitted requisitions in their approval queue.
- Users which have enabled the "PR Rejected" notification will also be notified of Returned documents via notification.

1. Access the purchase requisition, and assign it to yourself (for review).

2. Click the drop-down icon ▼ next to the header in the top left corner of the page, or the drop-down icon next to the Approve button in the top right corner of the page and select **Return to Requisitioner**.

3. In the overlay, enter the **reason** for the return and click **Save Changes**. This note will be available via the **Comments** and **History** tab and will be sent in the email to the requisitioner.

4. The requisitioner can access the requisition from the **Draft Carts** screen (Shop ▤ > My Carts and Orders > View Carts > Draft Carts), where the **Type** column will indicate that the requisition is **Returned**. From there, the cart can be opened, updated, and resubmitted.

Return Requisitions from a Third-Party System

In some cases, integrations are set up that allow the approval process to occur in a third-party ERP system. Responses from these systems can include a rejection, an approval, or a returned status, which returns the requisition to the requisitioner for review and processing. The status and reason from the third-party system is captured in the requisition History.

If a requisitioner would like to receive a notification regarding the PR validation status from the third-party system, the preference "PR rejected/returned" must be ON in the user's profile in order for the user to receive these emails.

Administrative Notes

- The reason the requisition was returned is included in the email if the setting "Include Requisition Notes in Email" is turned ON. This setting is found under **Setup** ⚙ **> General Site Settings > System Settings and Configuration > Configuration > Email Settings.** Note that turning this setting on means that all emails for rejected or returned requisitions will include the notes in the email, including manual rejections.

- The email for automatically returned requisitions is the same email that is sent for requisitions returned or rejected by an approver. You can modify the text of the email to cover both of these scenarios in field management. This is found by navigating field management under the Browse fields tab: General > misc > Email Notification > PR Returned.

Banner Integrations

- Banner is one of the third-party integration options used by JAGGAER customers for PR validation. A Banner budget authorization may fail due to an invalid user, invalid accounts, or insufficient funds. You may configure workflow settings to:

  - Return the requisition that failed budget authorization instead of rejecting it. Shoppers can correct and resubmit the requisition without having to create a new requisition.

  - Set a flag on the related budget authorization warning that can be used to trigger appropriate workflow, such as sending the requisition to a specific approvals folder for further review. This flag follows the order through PO and invoicing.

- The reason the requisition was returned is included in the email if the setting "Include Requisition Notes in Email" is turned ON. This setting is found under **Setup** ⚙ **> General Site Settings > System Settings and Configuration > Configuration > Email Settings**. Please note that turning this setting on means that all emails for rejected or returned requisitions will include the notes in the email, including manual rejections.

- When a requisition is returned, it is returned at the header level – not individual lines

Reject a Requisition or Purchase Order

This task explains how an approver can reject documents and lines from PR and PO documents from the application. For details on rejecting a PR or PO from a notification, refer to Email Approval.

Important Note: Use caution if you are reviewing a purchase order that has been created and revised (change order). Understand that by rejecting a PO revision, the original PO is also rejected.

JAGGAER ONE Cross-Module Integrations customers who create **Sourcing+ RFQs from Purchase Requisitions** – Requisitions with **Out for Sourcing** line items cannot be rejected, and the option will not appear. If the **Reject Line Item** option is chosen for a specific line, an error message appears and you are not allowed to reject the line.

Reject a Requisition

Once a requisition is rejected, it cannot be reinstated.

1. In the **My Approvals** folder, locate and open the appropriate document.

2. To reject the entire requisition, go the top right corner of the page and click the **Reject** button.

3. Enter a rejection reason in the pop-up window.

4. Click the **Reject Requisition** button to save the comment and reject the requisition. The rejection is not finalized until the workflow step is complete.

Reject Lines on a Requisition

1. Open the document from the **My Approvals** folder.

2. Choose one of these options:

   - *Reject an individual line item* - Locate the line item. Click the actions icon ••• next to it (right side) and select **Reject**.

   - *Reject multiple line items* - Click the checkbox to the right of each line item you want to reject. Click the actions menu ••• at the top of the line items and select **Reject Selected Items**.

3. Enter the **rejection reason** in the pop-up window and click **OK**. The line item(s) are rejected. **Note:** The rejection is not finalized until the workflow step is complete.

4. Select **Approve** in the right panel to complete the step.

Reject a Purchase Order

Once a purchase order is rejected, it cannot be reinstated. **NOTE:** Use caution if you are reviewing a purchase order that has been created and revised (change order). Understand that by rejecting a PO revision, the original PO is also rejected.

1. In the **My Approvals** folder, locate and open the appropriate document.

2. To reject the entire purchase order, go the right-side panel and click the **Reject** button OR click the drop down icon ▾ next to the header in the top left corner of the page and select **Reject Purchase Order**.

3. Enter a rejection reason in the pop-up window.

4. Click the **Reject Purchase Order** button to save the comment and reject the order. The rejection is not finalized until the workflow step is complete.

Reject Lines on a Purchase Order

1. Open the document from the **My Approvals** folder.

2. Click the checkbox to the right of each line item you want to reject. Click the actions menu ••• at the top of the line items and select **Reject Selected Items**.

3. Enter the rejection reason in the pop-up window

4. Click **Reject Line Item**. The line item(s) are rejected. **Note:** The rejection is not finalized until the workflow step is complete.

5. Select **Approve** in the right panel to complete the step.

Approve a Requisition or Purchase Order

The approver can quickly complete the approval process once the review of the document is complete.

Note: This task assumes the approver is working in the application to perform this task. For details on approving a PR or PO from a notification, refer to Email Approval.

Quick Approvals

If you do not need to review a requisition or order before it is approved:

1. In the **My Approvals** folder locate the document(s) you would like to approve.

2. Approve the document(s):

   - To approve a single document, click the associated **Approve** button.

   - To approve multiple documents, click the checkboxes for the appropriate documents. Select **Approve/Complete** in the drop-down and then click the **Go** button.

Standard Approvals

With standard approvals, the approver opens the order and reviews the information and makes any changes if needed, then approves the order.

1. In the **My Approvals** folder locate and open the document(s) you would like to approve.

2. Open the document, review the information and make updates if needed.

3. Choose one of these options:

   - **Approve** - Select the Approve button in the top right corner of the page approve the open document only.

   - **Approve & Next** - Select to approve the document and move to the next document in your approvals folder. **Note:** If you have multiple documents to approve, the Approve & Show Next button is displayed by default. If you want to approve the open document only, click the drop down icon next to the button and select **Approve**.

Manage Comments on a Requisition or Purchase Order

Comments can be added to purchase requisitions and purchase orders that have been saved or created in the system. Comments provide a way for approvers to communicate any questions they have to the requisitioner, allows requisitioners to add additional documentation needed, and more.

View Comments

1. Open the document with the comments you want to view.

2. Click the **Comments** tab. Comments that have been added to the record are displayed.

3. (optional) Choose an option from the **Show Comments for** drop down to show all comments added to the record during eProcurement process, or show only comments that were added to the requisition, purchase order, invoice or receipt.

Add a Comment

Users can add comments to documents that they created (as the requisitioner), that they have permission to view (based on departmental or organization-wide viewing privileges), or orders that require the user's approval.

1. Open the document you want to add comments to.

2. Open the **Add Comment** window by going to the drop down menu ⏷ next to the document header (top left corner of the page) and select **Add Comment** OR click the **Comments** tab and click the new comment icon ➕.

3. Select the checkbox next to the users that you would like notified of the comment via email. For example, if you are an approver, you would probably like to notify the requisitioner of the question at hand. If you are a requisitioner responding to a question, you may want to email the approver and your boss. Click the **Add recipient** link to find other users to email. **Note:** The application will indicate if an associated user is inactive. This is for informational purposes only. You can still select an inactive user to be notified about the comment.

4. Enter a comment in the text box (optional). The maximum number of characters that can be entered is 1000.

5. *(optional)* If you want to add a file or link to the comment, select the **Attachment Type** and upload the file or enter the link in the appropriate fields. Be sure to include a file or URL name for reference purposes later.

6. Click the add comment icon ✔. If you chose to notify users, an email will automatically be sent to those users.

The Comments page updates to display the comment that has been added and the number of comments displayed on the Comments tab heading is increased. Attachments added to a comment are also displayed in the **Attachments** area.

Reply to a Comment

1. Open the document with the comment you want to reply to.

2. Click the **Comments** tab and locate the comment you want to reply to.

3. Click the reply icon ◀.

4. In the **Add Comment** window, select the checkbox next to the users that you would like notified of the comment via email.

5. Enter a comment in the text box.

6. (optional) If you want to add a file or link to the comment, select the **Attachment Type** and upload the file or enter the link in the appropriate fields. Be sure to include a file or url name for reference purposes later.

7. Click the add comment icon ✔.

Remove Comments from Purchasing Documents

Users with the appropriate permissions can remove comments from a purchasing document. If you have permission to remove comments, a Remove icon or link will display beside the comment.

> **Note:** Some users have permission to remove all comments from any purchasing document, and other users may only have permission to remove comments that they created. Please contact your System Administrator if you are unsure of your permission level.

1. Open the document with the comments you want to view.

2. Click the **Comments** tab and locate the comment you want to remove.

3. Click the remove icon 🗑.

4. Click **Yes** or **Confirm** in the confirmation window.

Edit a Discount on a Requisition or Purchase Order

When a shopper applies a discount in a cart or at checkout, the discount can be edited on the resulting requisition and purchase order. Discounts can be applied on both the supplier level (applying a discount to all products from a specific supplier) and the line level. A discount can be an amount or a percentage. **Important Note:** This feature is used for applying MANUAL discounts. While there is an option to include a discount code, there is no validation of that code and discounts are not calculated by the application. The shopper or administrator editing the discount is required to enter all of the details. It is important for organizations to establish best practices for using the feature to avoid erroneous discounts.

1. Open the requisition or purchase order

2. Edit the discount:

   • **Edit a Line-level Discount** - Locate the line item. Select the action icon ⚬⚬⚬ next to it (right side), then select **Edit Discount**.

   • **Edit a Supplier-level Discount** - Locate the supplier group. Select the action icon ⚬⚬⚬ next to it (right side), then select **Edit Discount**.

2. The **Add Discount** or **Edit Discount** (if there is an existing discount) overlay opens. It displays the supplier name, the discounted line(s) and the price subtotal for the discounted item(s). Configure the following discount fields:

- **Pricing Code** (optional) - If there's a code associated with the discount, enter it in this field. **Important Note**: This field is optional and is not used to calculate the discount, which is done manually in the following fields.

- **Apply Discount** (required)- Select **Before Tax Calculations** to apply the discount before taxes, or **After Tax Calculation** to apply it after. **Note:** If your organization does not have the tax estimate feature enabled, this field does not display.

- **Discount** (required) - Click the appropriate radio button to determine if the discount will be based on a percentage or amount.

  - **Percentage** - If you select this option, enter a value in the field to apply a percentage discount. For supplier-level discounts, the percentage applies to each item. For example, if you apply a 50% discount, each item will be discounted 50%.

  - **Amount** - If you select this option, enter a value in the field to apply an amount discount. For supplier-level discounts, the amount is divided among all items and is weighted based on the cost of the item. The discounts for each item add up to the total discount amount. You are able to adjust the amount of the discount per line. To do so, click the **More Actions** button and select **Edit Discount**. **Important Note:** The discounts per line item must add up to the total discount amount for the supplier. You will get an error if you attempt to submit a cart or document with mismatched amounts.

3. **Preview Calculations** - Select this link to see a preview of the discount before applying it.

- If you chose to apply the discount before tax calculations, the information includes the extended price subtotal, discount amount calculated from the extended price subtotal, discounted extended price subtotal, taxes estimated for the discounted extended price subtotal, shipping and handling, and a total.

- If you chose to apply the discount after tax calculations, the preview will display the extended price subtotal, tax calculated against the extended price subtotal, discount amount calculated on the extended price, shipping and handling, and then a total. For multiple items discounted on the supplier level, the preview shows the totals for all items.

4. Click **Apply**.

Assign a Substitute Approver for a Requisition or Purchase Order

In the event that an approver is absent or unavailable, the user can designate another approver as a substitute. The substitute is able to review documents routed to the original approver. Substitutes can be assigned to a single approval folder or for all approval folders the user is responsible for reviewing. Substitutions can be manually stopped and started or you can schedule start and end dates.

The goal of the task is to assign a substitute approver for an approver's purchase requisitions and/or orders. Keep in mind, you can choose to use a substitute approver for documents in all folders (shared folders, My Approvals, etc.) or a select a specific folder. You can assign substitutes from the **Approvals** section of the application or you can assign substitutes for a specific user through the user profile. Following are the actions for selecting a substitute through the Approvals section.

1. Go to **Orders** ⬚ **> Approvals > Assign Substitute Approvers-Requisitions** or **Orders** ⬚ **> Approvals > Assign Substitute Approvers-Purchase Orders**.

2. Select the type of document in the **Refine Search Results** section.

3. Select to view your own approvals under **View Approvals For** by selecting **My Approvals** in the drop-down, or select another approver for whom you have managed approvals before. You may also choose to view another approver's folders by selecting to **Add Another Approver**.

4. To assign a substitute to a **single** folder, click the **Assign** button under the Action column for the appropriate folder. The **Assign Substitute** window will display. Proceed to Step 7.

5. To assign a substitute to **multiple** folders, click the checkbox to the right of each folder name in the list, and select **Assign Substitute to Selected Folders** from the **Substitution Actions** drop-down button. The **Assign Substitute** popup window displays. Proceed to Step 7.

6. To assign a substitute to all approval folders, Click the **Assign Substitute to All** *[Document Type]* **Folders** button. The **Assign Substitute** popup window displays. Proceed to Step 7.

7. Configure the substitution:

   a. Begin typing the name of the user in the **Substitute Name** field or select the search icon to enter other criteria to search for users. The application will provide a list of matching users based on what you enter. **Note:** Only users who are allowed to approve documents will display in the list.

   b. If you would like to configure a date range for the substitution period, click the **Include Date Range for Substitution** checkbox. Select a **Start Date** and time and

End Date and time. The substitution will begin and end automatically based on the configured dates. **Note:** The time and date will be based on the time zone of the original approver, not the substitute.

    c. Click the **Assign** button. The substitute will be assigned.

8. To remove a substitute approver:

    a. For a single folder, click the **Remove** button for the folder.

    b. For multiple folders, select the checkbox for each folder, and choose **Remove Substitute from Selected Folders** from the **Substitution Actions** drop-down button.

    c. For all folders, select **End Substitute for All** *[Document Type]* **Folders** button.

Assign a Requisition Ad-Hoc Approver to a Requisition

The Requisition Ad-Hoc Approver feature allows approvers of a requisition to send it to a user who is not in the regular workflow for a one-time approval. The ad-hoc approver can approve the requisition to send it to the next workflow step, or send it to a different ad-hoc approver if they have the appropriate permissions.

Send a Requisition to a Requisition Ad-Hoc Approver

These elements must be in place before you can send a requisition to an ad-hoc approver:

- The feature must be enabled for your organization.
- You must have the **Add Ad-Hoc Approver for Purchase Requisitions Approvals** permission (Permission Settings > Approvals > Requisition Approvals).
- You must be an approver on a requisition approval workflow step.
- The requisition must be assigned to you.

1. Open the **requisition** that you want to send to an ad-hoc approver.

2. Click the **Select** link next to the **Ad-Hoc Approver** field on the requisition. The Ad-Hoc Approver window opens.

3. In the Ad-Hoc Approver window, select a user in the **Ad-Hoc Approver** field using the type-ahead or search options.

> **Note:** The users who are available for selection as ad-hoc approvers are defined by user permissions and organization settings.

4. Enter notes in the **Comments** field. These will be displayed in the Comments section of the requisition and in the text of the email notification.

5. Click **Save**. The name of the person selected as an ad-hoc approver is displayed next to the Ad Hoc Approver field. Comments are displayed in the Comments section of the requisition.

> **Note:** The ad-hoc approver can be changed or deleted as long as the PR has not been approved and is still assigned to the person who added the ad-hoc approver.

6. Approve the requisition. Once the original approver approves the step, the requisition is automatically assigned to the ad-hoc approver.

The requisition ad-hoc approver can review the requisition and perform regular approval tasks. Once they select **Approve/Complete Step** from the Available Actions menu, they have approved the requisition and it continues to the next requisition approval workflow step.

Approve a Requisition as a Requisition Ad-Hoc Approver

If you have been assigned to approve a requisition as an ad-hoc approver, you can find the requisition assigned to you for approval in your My Approvals folder, or by clicking the email link in the notification you have received, which will take you directly to the invoice to be approved.

You need the **Perform Requisition Ad-Hoc Approvals** permission (Permission Settings > Approvals> Requisition Approvals) to perform this task.

1. Open the **requisition** that has been assigned to you for approval from your **My Approvals** folder (Orders > Approvals > Requisitions to Approve), or click the email link in the notification you have received.

2. Review the information.

3. Select **Approve** to approve the requisition and send it to the next workflow step. **Note:** If you have multiple documents to approve, the **Approve & Next** button is displayed by default. If you want to approve the open document only, click the drop down icon next to the button and select **Approve**.

Expedite an Order (Skip a Requisition or Purchase Order Approval Step)

Expediting allows an approver to skip one or more steps in the purchase requisition or purchase order workflow. Expediting is typically done for testing purposes or occasionally to purposefully skip steps. Use caution when expediting orders. Whenever an order is expedited, the process is tracked in order history.

There are four permissions associated with expediting, each explained below.

- **Expedite requisitions** - This permission allows an approver to skip steps up to the last step they are allowed to approve in PR workflow, but not beyond.
- **Expedite requisition through all workflow steps** - This permission allows an approver to skip any and all steps, including system steps such as creating the purchase order.
- **Expedite purchase orders** - This permission allows an approver to skip steps up to the last step they are allowed to approve in PO workflow, but not beyond.
- **Expedite purchase orders through all workflow steps** - This permission allows an approver to skip any and all steps, including system steps such as distributing a purchase order.

1. Access the purchase requisition or order via Document Search.

2. Open the order and go to the panel on the right.

3. Under the **What's Next** subheading, click the actions icon ••• next to the appropriate step and select **Expedite**. Keep in mind, the PREVIOUS step/steps will be expedited, but not the one selected.

4. From the pop-up window, document the reason for expediting the order. This note displays in the History for the PR/PO.

5. Click **Expedite**. The approval workflow is skipped up to the step you are on. "Bypassed" is displayed on skipped workflow steps.

6. To move to the next step, select **Approve & Show Next** or **Approve**. The order is expedited.

Revert a Workflow Step

If the Revert Workflow feature is enabled for an organization, users with permission to revert workflow approval steps can select the **Revert workflow to a previous step** action to return a document to a previous workflow step.

Revert Workflow options are not available for documents in Draft or Completed status, or if an automated step process is pending.

Revert a Workflow Step

1. Open the document.

2. Select the Revert Workflow action:

   - *New experience view* - In the right sidebar, under **What's next?**, click the actions icon ••• next to **Workflow** and select **Revert workflow to a previous step**.

- *Legacy view (for any document showing the legacy view, such as Forms or Sourcing) -* Click the **Revert workflow to a previous step** link.

3. In the pop-up window, click the **Select** button next to the workflow step that you want to revert TO.

4. Enter a reason for reverting the step (required) and click **Revert**.

5. The document returns to the selected workflow step, which now becomes the active step in workflow. Once the **Revert** button is clicked:

-   The Revert Workflow action is recorded in the History along with the reason.

-   The workflow is re-calculated and any previously approved steps, including the newly active step, are reset. All previous approvals are cleared and the steps will require approval again (although all previous approvers of a workflow step are still recorded in the History).

-   Emails and notifications will be re-sent where applicable.

-   A notification near the top of a document indicates that it has been reverted to a previous workflow step.

- The **Revert** workflow action affects different types of workflow steps as follows:

  - **Parallel workflow steps** - Users can revert back to any parallel step. This will cause ONLY the selected step to become active, while all other parallel steps will remain in their current state (approved, bypassed, skipped). **Users need to repeat the Revert Workflow action for EACH parallel step that they want to make active.**

  - **Ad-hoc workflow steps** - Users can revert back to an ad hoc step. The step will become active and the approver that was previously selected for the ad-hoc step will need to approve it again. This is also true if workflow is reverted to a step *before* an ad-hoc step - the ad-hoc step will be reset and the approver who was previously selected will need to approve the step.

  - **Skipped steps** - Since workflow is re-calculated, skipped steps are reset. Previously skipped steps are displayed or hidden as if entering the initial workflow.

Email Approval

Overview

Organizations with requisition or purchase order workflow can offer their approvers the ability to take action on documents quickly whether they are in the office or on the go. Email approvals allow an approver to receive an email with important information regarding the order to approve or reject, along with the ability to approve or reject the PR or PO without logging into the application. With the option and permissions enabled, approvers will receive an enhanced approval email containing pertinent order information and a quick action webpage link where action may be taken.

Some organizations require users to enter an approval code when approving documents via email. In that case, there must be an approval code set up in the user profile. If you do not have an approval code configured in your user profile, you receive the email but it does not contain the link to the approval page. Instead, a warning message displays directing you to your site to take action on the document. The message also advises you to configure their email approval code to take action from future emails. For information about setting up approval code in your user profile please see "Update Security Settings" in the **Site Essentials Handbook** or online searchable help. If you do not have access to your user profile, please contact your system administrator.

If an organization chooses not to use the basic notifications sent to approvers for pending purchase requisitions or purchase orders, a more detailed email will be sent, providing item and order data.

Related Permissions

Permission	Location
Approve/Reject Purchase Orders via Email	Permissions Settings > Approvals > Purchase Order Approvals

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

How Does It Work?

When email approval is enabled, organizations will, by default, require approvers to enter an email approval code to take action from the webpage link, therefore ensuring the authorized approver is the person taking action on the requisition or purchase order. Approvers maintain an email approval code in their user profile. When the approver accesses the approval webpage, they enter the email approval code and are authenticated as the authorized approver.

For additional information about configuring the organization to utilize email approvals, see "Workflow Email Approval Configuration" in the online searchable help.

Who Can Approve Orders by Email?

Only approvers given permission to approve/reject requisitions or PO's via email will receive the enhanced email. The default email received by those who do not have this permission is the basic approval notification. The organization can configure that users receive the enhanced email without approval links.

Users will not be able to approve from email where the organization has required email approval codes, but the approver has not yet configured an approval code in their profile. In this case, the approver will receive the enhanced email with order information; however, the email will not contain a link to the approval webpage. Instead, a warning message will display directing them to their site to take action on the document as well as to configure their email approval code to take action from future emails.

What Information is Included with Requisition Emails?

The following information is included in the Purchase Requisition email:

- **Summary information** including Cart Name, Requisition #, Prepared by user, Prepared for user (if different than prepared by user), Workflow Folder , Priority, No. of line items, and Total amount/currency of the requisition.

- **Line level information** including Supplier Name, Item number (number of the line on the requisition, Item 1, Item 2, etc.), indication if the item is a non-catalog item, indication if the item is rejected or withdrawn, Product Description, Catalog Number, Quantity, Unit Price, Extended Price, Custom Catalog Attributes (if applicable) - Displays if the attribute is active and has a value, Contract number and name (if applicable), Size/Packaging, Taxable, Capital Expense, Commodity Code, Product flags - listed if true for the item, Custom field values – line values or if line is different from header value, Internal Notes - if populated, Internal Attachments - if present, and External Attachments - if present. **Note:** If the requisition contains more than ten lines, a message displays indicating user must login to see the details. If the item was rejected or withdrawn in a previous approval step, only the Product Description and Catalog number displays for that line.
- **Form data** including the name and type of form that was used to populate the line item(s).
- **Account Codes** information including the field, value, and description. For example: Project: 123, Services.
- **Additional information** such as the comments, the list of other approvers, names for internal attachments and supplier attachments, shipping address.
- **A hyperlink to take action on the requisition.** This link does not display if the approver does not have an approval code set up or if it is the user's own order. This link also does not display for those organizations that do not allow direct approvals from email.

What Information is Included with Purchase Order Emails?

The following information is included in the Purchase Order email:

- **Summary information** including Purchase Order #, Owner Name, Workflow Folder , Priority, Contract, No. of line items, and Total amount/currency of the requisition.
- **Line level information** including Supplier Name, Item number (number of the line on the requisition, Item 1, Item 2, etc.), indication if the item is a non-catalog item, indication if the item is rejected or withdrawn, Product Description, Catalog Number, Quantity, Unit Price, Extended Price, Custom Catalog Attributes (if applicable) - Displays if the attribute is active and has a value, Contract number and name (if applicable), Size/Packaging, Taxable, Capital Expense, Commodity Code, Product flags - listed if true for the item, Custom field values – line values or if line is different from header value, Internal Notes - if populated, Internal Attachments - if present, and External Attachments - if present. **Note:** If the PO contains more than ten lines, a message displays indicating user must login to see the details. If the item was rejected or withdrawn in a previous approval step, only the Product Description and Catalog number displays for that line.
- **Form data** including the name and type of form that was used to populate the line item(s).
- **Account Codes** information including the field, value, and description. For example: Project: 123, Services.
- **Additional information** such as the comments, the list of other approvers, names for internal attachments and supplier attachments, shipping address.

- **A hyperlink to take action on the PO.** This link does not display if the approver does not have an approval code set up or if it is the user's own order. This link also does not display for those organizations that do not allow direct approvals from email.

How Do I Take Action?

After reviewing the order details in the email, the approver will select the link to access the secure approval webpage. The webpage that launches will display limited document information to confirm the approver has landed on the approval page for the appropriate document. The approver will have the following actions available (depending on permissions):

- Requisition: approve, reject, assign to myself, and return to requisitioner (if available to the organization).
- Purchase order: approve, reject, assign to myself.

The approver will select the desired action and enter a comment if they choose. Approvers must enter their email approval code to submit the action for organizations where it is required. If action has already been taken by another approver in a shared folder, the approver will receive a message that action has already been taken on the document.

Once the action is complete, the approver receives a confirmation webpage. The action is logged in history as having been taken via email. Comments are also logged to Comments and history.

This task assumes the organization has configured users to approve orders via email, the user has an approval code configured, and user has enabled approval notification preferences.

1. When a PR or PO is assigned to you for approval, you will receive an email. Access the email and review the details regarding the document.

2. Click the **Take Action** button to perform any of the following tasks:

3. For a requisition: approve, reject, assign to myself, and return to requisitioner (if available to your organization).

4. For a purchase order: approve, reject, or assign to myself.

5. From the window that displays, enter a comment (optionally).

6. Enter the email approval code if this is required.

7. Click **Submit**. A confirmation page displays. The action that was performed in logged into the history for the PR or PO, as well as comments. **Note:** If action has already been taken by another approver in a shared folder, the approver will receive a message that action has already been taken on the document.

MFA Approval

Overview

If your organization has implemented the **Multi-factor Authentication** (MFA) feature for PR or PO approvals, there may be an extra authentication step when you approve a requisition or purchase order.

If MFA is enabled, when you approve a requisition or purchase order, a MFA window will prompt you to select an authentication method. An MFA code is sent to you, and you must enter the code in order to approve the document.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Approve a Requisition or Purchase Order with MFA

If MFA is enabled, when you approve a requisition or purchase order, an MFA window will prompt you to select an authentication method. An MFA code is sent to you, and you must enter the code in order to approve the document.

Depending on your organization's setup, you will see one or more of the following authentication methods. The first four options require the use of a mobile phone:

- Google Authenticator
- Sophos Authenticator
- OTP Auth (iOS only) - OTP Auth is only available for iOS devices.
- SMS (Text) - This method is only available if you have a phone number entered on your user profile.
- Email

There is some set up that is required the first time you validate using Google Authenticator, Sophos Authenticator, or OTP Auth methods. The system will direct you to download these apps from the app store onto a mobile phone, where you will need to enter a device name and scan a QR code.

If you are on the My Approvals page and more than one document, or document line item is selected, only one code is needed and that code will be used to approve all items that have been selected for approval.

Your organization has set a time period that a MFA authentication code is valid for, usually in seconds. You will receive an error if the time period has passed and you try to approve another requisition.

1. Open the **requisition** or **purchase order** you need to approve from one of these locations.

   - **Orders > Approvals > Requisitions to Approve**.

   - **Orders > Approvals > Purchase Orders to Approve**.

2. Select or open the document(s) to approve:

   - On the **My Approvals** page, select the checkbox next to each document you want approve.

     > **Note:** On the **My Approvals** page, if more than one document or document line item is selected, only one code is needed and that code will be used to approve all items that have been selected for approval.

     OR

   - Click the **Quick View** icon next to a requisition or purchase order to open a single document for review and approval.

3. **Assign** the document(s) to yourself for approval.

4. **Approve** the document:

   From the My Approvals page:

   - Click the **Approve** button next to an item, or select the checkbox next to each document you want approve, select **Approve/Complete** from the drop-down field and select **Go**.

   From an open document:

   - Click the **Approve** or **Approve & Next** button near the top right corner of the page.

5. When **Approve** is clicked, the Multi-factor Authentication window opens and displays a list of the authentication methods enabled by your organizations. The options displayed will be one or more of the following:

- Google Authenticator
- Sophos Authenticator
- OTP Auth (iOS only)
- SMS (Text) - This method is only available if you have a phone number entered on your user profile.
- Email

6. Select an **authentication method** and follow the prompts:

- **Google Authenticator, Sophos Authenticator or OTP Auth** - If this is the first time you are validating with Google Authenticator, Sophos Authenticator, or OTP Auth there is some setup required. See the **Install the App** section below for details.

  - The system displays the barcode.
  - Open the app on your phone and select
    - **Scan barcode** if using the Google Authenticator or OTP Auth app.
    - **Scan QR** if using the Sophos Authenticator app.
  - Scan the barcode with your phone.
  - The authenticator is displayed in the app.

- **SMS** - Click **Text me** to use SMS authentication. Message and data rates might apply, depending on your carrier. The system sends an authentication code in a text to the mobile telephone number configured in your user profile.

- **Email** - Click **Email me** to use email authentication. The system sends an authentication code in an email to the address configured in your user profile.

7. Enter the **code** you received via the authentication method in the open field, then click **Validate Code**. The document is approved.

   You will receive an error if:

   - The time period that the MFA code is valid for has elapsed before approving another PR. The time period is based on your organization settings.

   - If an invalid code is entered after three tries, you will be directed back to the My Approvals page and there will be an entry in the PR history that validation has failed.

Install the App

There is some set up that is required the first time you validate using Google Authenticator, Sophos Authenticator, or OTP Auth. The system will direct you to download these apps from the app store onto a mobile phone, where you enter a device name and scan a QR code. OTP Auth is only available for iOS devices.

1. In the Multi-factor Authentication popup, select the app you want to use. The system will prompt you through the next steps.

2. In the **Let's Begin** pop up, click **Next**.

3. In the **Get Authenticator Code** popup, enter the name of your mobile device, then click **Add**.

4. Follow the instructions in the Set Up Authenticator popup:
    a. Select the app you want to use.
    b. Download, install, and open the app (set up an account, if required).
    c. In the app, select **Scan Barcode** or **Scan QR**.

5. Scan the barcode with your phone. The authenticator sends an authentication code to your phone.

6. In the Multi-factor Authentication popup window in the application, enter the code and click **Validate Code**. The document is approved.

Approval Notifications

Overview

If your organization has workflow notifications enabled, notifications will be sent based on certain triggers in the workflow. The application captures a list of these notifications for your review. Notifications will be available for view by document type (Requisition and Purchase Order). **Note:** Your organization's setup and your individual permissions will determine which notifications you will be able to *view.*

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

View a List of Approval Notifications

1. Go to **Orders** 🕐 **> Approvals > Approval Notifications**.

2. The view will default to the Requisition Notifications tab. Click on another tab to view the notifications for different document types to which you have access.

3. The list is sorted by document date/time starting with the most recent. Click the sort icon ⌃ beside a column name to sort by that column.

4. Click on the document number to view the associated document.

5. To remove a single notification, click the **Remove** button.

6. To remove multiple notifications, select the checkbox to the far right of each notification. Select **Remove Notifications** from the dropdown box and then click **Go**.

7. To remove all notifications select **Remove All Notifications** from the dropdown box and then click **Go**.

Override Requisition Exchange Rates

Overview

If the **Override PR Exchange Rates** feature is enabled for your organization, and you have the appropriate permission, you can override the current exchange rate on purchase requisitions and use a specified one.

Related Permissions

The **Override Exchange Rates** (Permissions > Administration > System Administration) permission is required to perform this task.

Permission	Description	Location
Override Exchange Rates	Users with the permission can override exchange rates on purchase requisitions. This setting is off by default. This permission is only visible if an organization has the Override Document Exchange Rates feature enabled.	Permission Settings > Administration > System Administration

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

About Document Exchange Rates

JAGGAER updates exchange rates nightly, and use those rates on purchase requisitions until new exchange rates are imported.

If the **Override PR Exchange Rates** feature is enabled for your organization, and you have the appropriate permission, you can override the current exchange rate on purchase requisitions and use a specified one. This can be helpful when there is an agreement between a customer and a supplier to use a specified exchange rate and not the current (fluctuating) one.

The overridden exchange rate is copied from the purchase request to POs, PO faxes, and change requests. This change does not affect invoices.

An **Override exchange rates...** link is displayed on requisitions if the following conditions are in place:

- The organization has the feature enabled.
- The logged in user has the Override Document Exchange Rates permission.
- There is only one supplier on the requisition. Exchange rates cannot be overridden if there are multiple suppliers on a requisition.
- The requisition is in Pending or an editable workflow status. When a requisition is in Completed status, the Override Exchange Rate link is not displayed.

Exchange rates can be changed while the requisition is in the workflow and on change requests. Approvers with the Override Exchange Rate permission can override rates.

Override Document Exchange Rates

1. Navigate to **Orders** **> Approvals > Requisitions to Approve**.

2. Open the **requisition** you want to modify. It must have only one supplier and be in an editable workflow status.

3. Open the **Summary** tab and locate the **Items** section. An **Override exchange rates...** link is displayed under the supplier name.

    > **Note:** Multiple supplier sections are displayed if a requisition has the same supplier but there are lines with different currencies. The Override exchange rates... link is displayed in each section.

4. Click the **Override exchange rates...** link under the supplier name. The **Override Exchange Rates** window opens. There is a line for each currency that is applicable to the requisition. Each line displays the Base Currency set for the organization, the current Exchange Rate, and the Supplier Currency (the currency used by the supplier for the item).

5. For each rate that you want to change, click the **Override** checkbox to clear the current Exchange Rate field, then enter the exchange rate that should be used.

6. Click **Save**. The overridden rate applies to *all* lines on the document that use that currency.

- Clear the Override checkbox to restore the default exchange rate.

- If the supplier's currency and the organization's base currency are the same (i.e., USD to USD), then the Override checkbox will show but it will be disabled.

- If there are lines with rates that have not been overridden, the exchange rate at the time of the PR to PO flip is used.

Once the rates have been overridden and saved, the new amounts and rates will be saved to the requisition and will carry over to the purchase order, PO fax and any change requests once the requisition has completed. This change does not affect invoices.

Requisition and Sourcing Features

Overview

If enabled for your organization, purchase requisitions can be created from sourcing events. Sourcing and Quick Quote events can also be initiated from a requisition.

Related Permissions

Permission	Description	Location
Approve/Reject Requisitions	Description	Permission Settings > xxx > xxx
Approve/Reject Requests		

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Purchase Requisitions Created From Sourcing Events

Purchase requisitions can be created from Sourcing events. The resulting PR will display the appropriate item and supplier information from the PR. When a PR is created from a Sourcing event, the **Source Event** number displays as a link above the requisition information, and items are indicated with an **Awarded From Sourcing** icon.

For detailed instructions for creating a purchase requisition from a Sourcing event, see "Create a Sourcing Event from a Requisition" in the **Sourcing Handbook** or online searchable help.

Initiate a Sourcing or Quick Quote Event from a Purchase Requisition

For organizations that use the Sourcing solution, approvers of a purchase requisition with line items that need to be sourced can initiate a sourcing event or quick quote event for those items directly from the requisition.

When a selected PR line item has been integrated into a sourcing event, that item is adjusted to a $0.00 amount on the original requisition. Once that sourcing event is awarded, a new requisition is created for administering the procurement of that line item.

The ability to initiate a sourcing or quick quote event from a purchase requisition needs to be configured for your organization.

Add or remove a Requires Sourcing flag on a line item

Line items can be flagged for sourcing at checkout or during the approval process.

1. Open the **requisition** that contains the item(s) that need to be sourced.

2. Choose the items to flag by clicking the actions icon ••• next to an item you want to source, OR select the checkbox next to one or more items and select the drop down icon ▾ at the top of the Items section.

3. Select one of these options:

   • **Requires Sourcing** - A Requires Sourcing 🚩 icon is displayed next to the selected items to indicate that they need to be sourced and the requisition will stop at a "Requires Sourcing" workflow step.

   • **Remove Requires Sourcing** - The Requires Sourcing icon is removed from the selected line items.

Initiate a Standard Sourcing Event from a requisition

The **Approve/Reject Requisitions** and the **Approve/Reject Requests** permissions are required to perform this task.

1. Open the requisition that contains the line items that need to be sourced. The PR must be on a **Requires Sourcing** workflow step, you must be an approver on the step, and the PR must be assigned to you.

2. Choose the items you want to source and initiate sourcing event by clicking the actions icon ••• next to an item you want to source, OR select the checkbox next to one or more items and select the drop down icon ▾ at the top of the Items section, and select **Initiate Sourcing Event**.

   The Create Sourcing Event window opens and the selected line items are listed at the bottom of the window.

3. Complete these fields in the first page of the wizard:

   • **Event Title** - Enter a title for the event.

   • **Work Group** - Select a work group for the event.

4. Click **Next** and complete these fields in the second page of the wizard:

   • **Event Type** - Select the event type.

   • **Create from Template** (optional) - Select the template you want to use for the sourcing event from the drop down list. Templates contain pre-configured settings for different types of events. Only templates associated with the selected work group are available for selection.

   • **Currency** - Select the currency for the event.

- **Approve PR Workflow Step** - Select **Yes** to instruct the system to approve the original requisition out of the current workflow step at event creation, so that all the other items on the requisition can continue through the standard procurement process. When the selected PR line items have been integrated into a sourcing event, those items are adjusted to a $0.00 amount on the original requisition. Once that sourcing event is awarded, a new requisition is created for administering the procurement of those line items.

- **Go to Event after Creation** - Select **Yes** if you want to be directed to the sourcing event when the event is created. Select **No** if you want to stay on the purchase requisition when the event is created. No is the default setting.

- **Export Ship-To-Address to Event?** - Select **Yes** if you want to display the line item's Ship To address as a read-only field next to the line item on the event.

5. Click the **Create Sourcing Event** button. The sourcing event is created. Depending on the option selected on the "Go to Event after Creation" field, you will either stay on the requisition or be directed to the event's Setup page.

6. (optional) Click the **sourcing event** or **requisition number** in the top left "sticker" area of the PR record to view information about the sourcing event or related requisitions. Users with appropriate permissions will see **Go to Sourcing Event** or **Go to Requisition** links on the overlay that will take them to the related artifact.

Note: **JAGGAER ONE Cross-Module Integrations** customers can initiate a **Sourcing+ RFQ** from a purchase requisition. See Initiate a Sourcing+ Event from a Purchase Requisition for details.

Initiate a Quick Quote Event from a requisition

The **Approve/Reject Requisitions** and **Approve/Reject Requests** permissions are required to perform this task.

1. Open the requisition that contains the line items that need to be sourced. The PR must be on a "**Requires Sourcing**" workflow step, you must be an approver on the step, and the PR must be assigned to you.

2. Choose the items you want to source and initiate a quick quote event by clicking the actions icon ⚹⚹⚹ next to an item you want to source, OR select the checkbox next to one or more items and select the drop down icon ▾ at the top of the Items section, and select **Initiate Quick Quote Event**.

   The Create Quick Quote Sourcing Event window opens and the selected line items are listed at the bottom of the window.

3. Complete these fields:

    - **Event Title** - This field is auto-populated with "QQ" plus the requisition number and date. Change if needed.

    - **Create from Template** - Select a **quick quote template**. Active, published templates with the same work group as the logged in user are available for selection.

    - **Work Group** - Select a work group for the event. Only work groups that are associated with the selected template are available for selection.

    - **Supplier Group** - Select the supplier group for the event if applicable.

    - **Currency** - Select the currency for the event.

    - **Approve PR Workflow Step** - Select **Yes** to instruct the system to approve the original requisition out of the current workflow step at event creation, so that all the other items on the requisition can continue through the standard procurement process. When the selected PR line items have been integrated into a sourcing event, those items are adjusted to a $0.00 amount on the original requisition. Once that sourcing event is awarded, a new requisition is created for administering the procurement of those line items.

    - **Go to Event after Creation** - Select **Yes** if you want to be directed to the event when it is created. Select **No** if you want to stay on the purchase requisition when the event is created. No is the default setting.

    - **Export Ship-To-Address to Event** - Select **Yes** if you want to display the line item's Ship To address as a read-only field next to the line item on the event.

4. Once all the fields are completed, click one of the following buttons:

    - **Create & Submit to WF** - Click to create the event and immediately submit it into the sourcing approval workflow. All required event data will be captured from the pre-configured template and work group defaults during the creation process.

    - **Create Sourcing Event** - Click to create the event, but it will not be submitted into the sourcing approval workflow.

    Depending on the option selected on the "Go to Event after Creation" field, you will either stay on the requisition or be directed to the event's Review and Submit page. On the quick quote event, the open and close dates are auto-populated and the preferred award scenario is auto-applied, since the event was created using a quick quote template.

5. (optional) Click the **sourcing event** or **requisition number** of the PR record in the right-side panel to view information about the sourcing event or related requisitions. Users with appropriate permissions will see **Go to Sourcing Event** or **Go to Requisition** links on the overlay that will take them to the related artifact.

Requisitions and Sourcing+ Features

Overview

If enabled for your organization, purchase requisitions can be created from Sourcing+ events. Sourcing and Quick Quote events can also be initiated from a requisition.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Purchase Requisitions Created From Sourcing+ Events

JAGGAER ONE Cross-Module Integrations customers can generate purchase requisitions in eProcurement from an awarded Sourcing+ event in JAGGAER Advantage (JA). Detailed instructions for creating a purchase requisition from a Sourcing+ RFQ are available in "Creating Purchase Requisitions in eProcurement" in the online searchable help or the **Sourcing+ RFx Handbook** (JA).

The following information is copied to the purchase requisition from the Sourcing+ RFQ:

- **Basic RFQ Data:** RFQ reference code, title, description, currency, buyer username.

- **RFQ Line Data for Price Items only:** Item number, item description, quantity, UOM, goods group, price, item master code.

- **Selected Buyer and Supplier Attachment Information:** Note that the PR will be created and attachments subsequently transferred. The length of time to transfer all attachments may vary based on the total size of all attachments. Attachments are transferred as **Internal Attachments** on the purchase requisition. **Note**: You can make an attachment to the **External**, allowing it to be visible to suppliers. When viewing the attachment row, choose from the drop-down actions. You must have the **Manage Document Attachments** or **Edit Pending Requests** permission to change an attachment's visibility.

Once the PR is created, you can make adjustments to the requisition as appropriate and allowed by your user permissions. The PR displays a **View Associated Sourcing Events** link. Select the link to navigate to the event in Sourcing+ (with appropriate permissions).
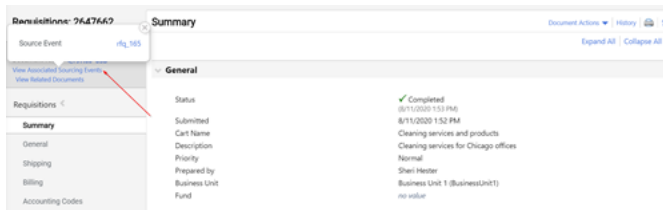
Initiate a Sourcing+ Event from a Purchase Requisition

JAGGAER ONE Cross-Module Integrations customer users with appropriate permissions can initiate a Sourcing+ RFQ in JAGGAER Advantage (JA) from a purchase requisition (PR). While in workflow, users with the appropriate permission will see the option to **Initiate Sourcing+ RFQ** and be guided through the process of selecting lines for sourcing. Once the Draft RFQ is created in Sourcing+, buyers can manage, evaluate and negotiate bids for the RFQ in Sourcing+.

1. Open the requisition that contains the line items that need to be sourced. The PR must be in the appropriate workflow step, you must be an approver on the step, and the PR must be assigned to you. If necessary, click the **Assign to Myself** from the **Available Actions** dropdown. If you do not see this option, contact your system administrator.

2. Select the lines to be sourced. From the **Available Actions** dropdown, select **Initiate Sourcing+ RFQ**. You will be navigated to the **Create RFQ** page in Sourcing+. For more information on creating a Sourcing+ RFQ, see "Create an RFx" in the online searchable help or the **Sourcing+ RFx Handbook** in Sourcing+ (JA).

3. The selected requisition lines are marked as **Out for Sourcing**.

4. If all lines are **Out for Sourcing**, the PR is automatically moved to **Completed** status. If any lines are not marked for sourcing, the PR remains in workflow approval.

5. Click the **View Associated Sourcing Events** link to see an overlay with a link to events associated with lines in the PR.
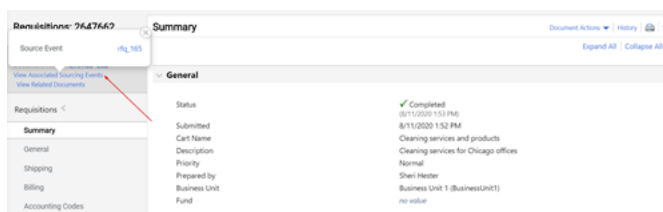
6. Select the hyperlink to navigate to the event in Sourcing+ (with appropriate permissions).

Note: While a single purchase requisition can be used to generate multiple Sourcing+ RFQs, an RFQ cannot be generated from multiple PRs (except in the case of Order Consolidation).

The following information is copied from the purchase requisition to the Sourcing+ RFQ upon creation.

- **Basic PR Data:** ID, Title, Description, Currency, Buyer and Supplier ID.
- **PR Line Data:** Item number, description, quantity, UOM, category, price, item master ID. Note: In the case of Forms, only the main requisition line that is selected will be transferred, and not the Form Lines that are completed within a form.
- **Custom Fields:** Header level custom field value, if configured by your organization.
- **Header and Line Level Attachments:** Internal and external attachments from the PR header and selected lines are included in the RFQ attachments areas.
- **Selected suppliers** (if configured).

Purchase Order Functions

Overview

These functions are used with purchase orders:

- **Payment terms** are used to specify when an invoice is paid. For example, a payment term could state that payment of an invoice is due 90 days after it is received.

- Organizations may enable the use of **order acknowledgments** (OAs) and **advanced shipping notices** (ASNs) to allow suppliers to review their sales orders, and buyers to verify that suppliers have received orders and that they can fulfill them. These notifications provide requestors and suppliers with a way to communicate with each other.

- Users with the appropriate permissions can override fax or email distribution on purchase orders.

- Users can **print a purchase order** for a paper record or for a separate review.

Related Permissions

Permissions for shopping are located under the user profile at **Permission Settings > Shopping Carts & Requisitions > Shopping.** The **Modify Order Distribution for Forms and POs** permission is needed to override fax or email distribution on purchase orders.

- **Modify Order Distribution for Forms and POs** - **Permission Settings > Shopping Carts & Requisitions > Shopping** - Users with this permission can create, view and edit their personal dashboards. Users can also copy any organization dashboards to which they have access.

Payment Terms on Purchase Orders

Payment terms specify when an invoice is paid. For example, a payment term could state that payment of an invoice is due 90 days after it is received. Payment terms can include discounts for early payment, for example, a 10% discount will be applied if the invoice is paid within 5 days, otherwise the full invoice amount is due 90 days after the invoice date. Payment terms on purchase orders can be inherited from a contract, sourcing event, or supplier fulfillment center. Invoices will inherit payment terms from a purchase order.

The way payment terms function will depend on your organization's setup.

Manual Entry

The image below shows the basic payment term fields: the first two fields are used to define any discount that would be applied for early payment, and the last two fields are used to calculate the due date for the full invoice amount. If your organization permits manual entry of payment terms, these fields can be changed while a purchase order is editable.

Standard Payment Terms

If your organization is using standard payment terms, a **Standard Payment Terms** field is displayed with payment terms, and a standard payment term can be selected from the drop-down list. Here is an example of payment terms on a purchase order with standard payment terms enabled:

In the **Standard Payment Terms** field, a standard payment term is selected by default with values inherited from a contract, sourcing event (if the line item from the requisition was awarded from a Sourcing event), or supplier fulfillment center. The Discount, Days, Payment Type and Days After fields are read-only fields that display information for the selected standard payment term. Users can select a different standard payment term while a document is editable (with the exception of sales orders, which inherit payment terms from the PO and are not editable).

> **Note:** If standard payment terms are enabled for an organization and payment terms are inherited from a sourcing event, the Discount, Days, Type and Days After fields will be populated with values from the sourcing event, but the Standard Payment Terms field will be blank as Sourcing does not use standard payment terms. Users are able to select a different standard payment term from the drop-down list.

The **Override Discount Terms** checkbox can be used to make the Discount and Days field values editable and this allows you to change the discount amount for the standard payment term. The Type and Days After fields remain read-only. If the checkbox is cleared, the payment terms return to the standard payment term's default settings. This checkbox is displayed in all locations except on the organization/business unit default settings and on sales orders.

> **Note:** If your organization has enabled custom payment terms, a **Custom Payment Terms** field is also displayed with payment terms and a custom payment term can be selected from the drop-down list. Custom payment terms are only available on purchase orders and do not populate invoices.

Manually Enter Payment Terms

1. Open the purchase order with the payment terms you want to enter or change.

2. Click the **Summary** tab and find the header section that contains **payment terms**.

3. Click the edit icon 🖊.

4. Complete these fields:

   - **Discount** (optional) - Enter the value of the discount that will be applied to the invoice total if payment is made before the number of days indicated in the Days field. This can be a percentage or a specific amount.

   - **Days** (optional) - Enter the number of days after receipt of an invoice that the discount can be applied. After this number of days, the full invoice amount is due on the date that has been calculated from values in the Type and Days After field.

   - **Type** - Select a type that determines how the invoice due date will be calculated. **Net** is the only option that can be selected if no other payment term types are enabled. Additional payment types **EOM**, **MFI**, **Manual** and **EOQ** are available for selection if they have been activated for use by your organization.

   - **Days After** - Enter the number of extra days that you want to add to the invoice payment Type to extend the due date of an invoice. The field is required, optional or not available depending on the payment Type selected.

5. Save your changes.

Enter Standard Payment Terms

1. Open the purchase order with the payment terms you want to enter or change.

2. Click the **Summary** tab and find the header section that contains **payment terms**.

3. Click the edit icon 🖊.

4. In the **Standard Payment Terms** field, select a **payment term** from the drop-down list.

5. (optional) To adjust the discount that is applied for early payment, click the **Override Discount Terms** checkbox and complete these fields:

   - **Discount** - Enter the value of the discount that will be applied to the invoice total if payment is made before the number of days indicated in the Days field. This can be a percentage or a specific amount.

   - **Days** - Enter the number of days after receipt of an invoice that the discount can be applied. After this number of days, the full invoice amount is due on the date that has been calculated from values in the Type and Days After field.

6. Save your changes.

Override Fax or Email Distribution at the PO Level

Users with the appropriate permission have the ability to change the fax or email distribution for a purchase order.

The **Modify Order Distribution for Forms and POs** permission (**Permission Settings > Shopping Carts & Requisitions > Shopping**) is needed to perform this task.

1. If you are making changes to a form, the change can be made directly on the form, OR...

2. For hosted or catalog items, the default order distribution can only be changed once the requisition becomes a purchase order. Click the **Edit** button to the right of the Distribution Method to change the email or fax number. **Note:** This is the same way in which you perform change orders.

TIP: To view the intended distribution method for a **Requisition**, click on the supplier name and the order info displays in the Supplier popup.

Order Confirmations

Purchase order requestors and suppliers need fast, easy communication with each other. Buyers need to verify that suppliers have received orders and that they can fulfill them. To facilitate this, organizations may enable the use of **order acknowledgments** (OAs) and **advanced shipping notices** (ASNs) to allow suppliers to review their sales orders and send these types of notifications back to a customer:

- **Order Acknowledgments** are sent by suppliers to confirm that they received the order and indicate if items on the order have been accepted, backordered, or rejected. Suppliers can also indicate the quantity of items being shipped, provide an estimated shipping date, and enter comments about the order.

- **Advanced Shipping Notices** are sent by suppliers to notify buyers or receivers that a shipment has been scheduled for delivery. These notices include shipping and delivery dates along with carrier and tracking information. Suppliers can also indicate the quantity of items being shipped and enter comments about the order.

If your organization has enabled the use of OAs and ASNs, order acknowledgment and shipment information is displayed in two tabs that can be used to view details.

Confirmations Tab

The **Confirmations** tab displays order acknowledgments sent by suppliers. The table format in the Confirmations tab shows the order acknowledgment action for each line. Click the OA number to open a print preview copy of the document.
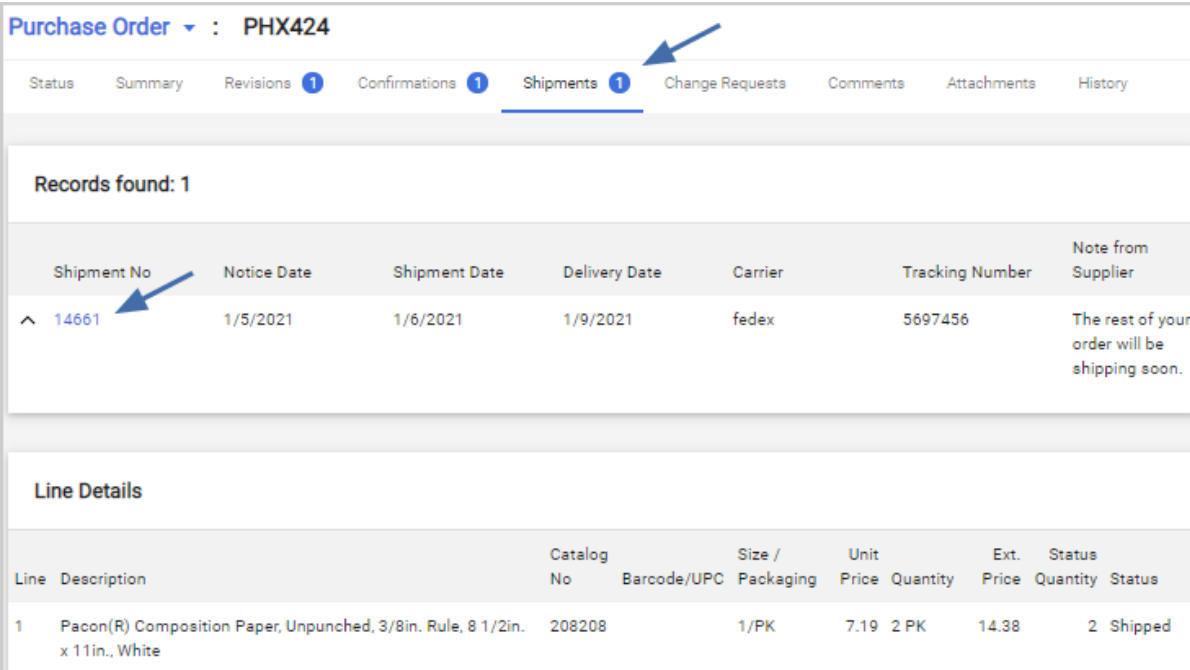
Shipments Tab

The **Shipments** tab displays advanced shipping notices sent by suppliers. Click the ASN number to open a print preview copy of the document.

PO Clauses

PO Clauses represent special conditions the supplier should reference regarding an order. Orders can contain one or more PO clauses, and they can appear at the header-level, line-level, and supplier-level on documents. They can be populated in these ways:

- On purchase orders, clauses are inherited from the requisition.

- PO clauses can be added to a document by default based on organization settings.

- They can automatically be added by the system based on an active PO clause rule.

- Users with the appropriate permission can manually add PO clauses to a document.

View PO Clauses

To view PO clauses, locate a **PO Clauses** field. Click the **View details** link (at the header or supplier level), or the **Add/View** link (at the line-level).

> **Note:** On requisitions, an information icon ⓘ indicates that the clause count in this field may not include clauses that may be applied due to clause rules.

Clauses added by organization default settings are listed first, then PO clauses added by a rule, followed by clauses that have been added manually.

Edit PO Clauses

On purchase orders, all PO clauses can be edited while a purchase order is in the approval workflow, including clauses added by a rule. They cannot be changed once a purchase order is complete.

Users with permission to modify PO clauses can manually add or remove PO clauses. Click the **Edit** link next to a **PO Clauses** field, then select or clear the checkbox next to the appropriate PO clauses and save changes.

AI-Based Commodity Code Selection Recommendations

Organizations use commodity codes (classification codes for products and services) on PR lines to track and classify their spend through the procure-to-pay process.

If the AI-based JAGGAER Advise solution to facilitate the selection of commodity codes on PR and PO lines has been enabled for your organization, users are prompted with commodity code recommendations based on the item description and historical PO/PR line code assignments for similar items.

Select a Commodity Code Using an AI-Based Recommendation

If this feature is enabled, a **Commodity Code Recommendations** drop-down appears below the **Commodity Code** search box when users click into an empty **Commodity Code** search box.

Users can expand this drop-down to access a list of up to the top 5 codes that are most likely to match the item's commodity code. The commodity code recommendations are presented in descending order based on their relevance to the item, with the most relevant codes listed first.

When users select a code, the drop-down collapses and the **Commodity Code** field is populated with the selected code.

Select a Code for New Non-Catalog Items

1. Add or open a non-catalog item.

2. Enter a description in the **Description** field.

3. Click into the empty **Commodity Code** field. Recommendations are displayed the first time a user clicks into this field.

Note: Recommendations are not updated if the text in the **Description** field is changed.

Select a Code for eProcurement Forms

1. Navigate to the *Form Fields* page within an eProcurement form.

2. Fill in the **Unit Price**, **Quantity**, and **Product Description** fields.

3. Click the **Edit** button for the **Commodity Code** field.

4. The *Commodity Codes* search box appears. Recommendations are displayed at the top of this overlay.

Commodity Code Search ✕

Commodity Code Recommendations

Code	Description	
20001	Office supplies	+
20002	Food Supply Services	+
123344	Computer Equipment and Printers	+

Code starts with...	Description contains...	Filter
		Clear All Filters

‹ › Page [1] of 3   1-20 of 53 Results   20 Per Page ▼

Code	Description ↑	
20003		+
20004		+
20011		+
20012		+
20013		+

Close

> **Notes:**
>
> • Unlike commodity code recommendations on carts and other documents, recommendations on forms do not display a drop-down list that is separate from the search overlay.
>
> • If the **Description** field is edited, click the **Edit** button for the Commodity Code field to refresh the recommendation list.
>
> • AI-based recommendations are available only at the line-level. Recommendations are not available for commodity codes at the header-level, which do not relate to a specific product description, unit price, and quantity.

5. Click the **Select** button to choose a recommendation from the list. The selected commodity code populates the **Commodity Code** field. When a form is completed, the selected recommendation is copied to the created cart.

Important Notes

- Once a commodity code is selected by either method, the **Commodity Code Recommendations** drop-down does not reappear when users click into the **Commodity Code** box. However, users can access the recommendations by clicking the magnifying glass icon 🔍 within the **Commodity Code** search box top open the *Commodity Code Search* pop-up window.

- Commodity Code recommendations are not supported when the **Commodity Code** field is configured as a drop-down list instead of a search box. If you are unable to access recommendations because your commodity codes are displayed in a drop-down list, please contact JAGGAER for assistance with your site configuration.

- Feedback on a selected code is returned to Advise to support machine learning and to help make future recommendations more accurate.

Select a Commodity Code Manually

Users have the option to reject the commodity code recommendations and perform a match manually using standard JAGGAER functionality.

- Click the magnifying glass icon 🔍 within the **Commodity Code** search box to access the familiar *Commodity Code Search* window where users can use pre-existing search functionality to locate and select a code.

- For users' convenience, Advise recommendations appear at the top of this page. Click a recommendation's **+** icon to select that commodity code.

Print a Purchase Order

Users can print the purchase order information for a paper record or for a separate review. Two different options are available to print the fax version of the purchase order, or to print summary information for the purchase order. The information for the summary version of the purchase order will vary, depending on the document layout selected by your organization.

1. Open the purchase order you would like to print.

2. Print a fax version or a summary version:

   a. *Print a fax version of the purchase order* - Click the drop down menu icon ▾ next to the header at the top left corner of the page and select **Print Fax Version**. A separate browser window displays with the fax version. Use your browser's print function to

print the document.

b. *Print a summary version of the purchase order* - Click the print icon 🖶 near the top right corner of the page. The summary will open in a separate window. Select the **Print** button.

View Document History and Comments

Overview

When a user opens a purchase requisition, a purchase order, invoice, or receipt, an audit trail is available through the **History** section and comments are available for viewing through the **Comments** section.

Reviewing the **Comments** and **History** for an order is a common way to track status and view an audit trail of events. Users can select to view the comments only for the document that is open (the PR, PO, etc.) or for all associated information for all document types (requisition, purchase order, invoice, and receipt). This provides the ability to see all related comments on a single comments tab and saves valuable time toggling to different screens.

Related Permissions

Permission	Location
View Line Item History	Permissions Settings > Shopping, Carts & Requisitions > Cart/Requisition

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

View Document History

1. Open the document (the PR, PO, etc.).

2. Go to the **Comments** section to view comments. By default, only those comments for the open document display. Use the filter to view any associated comments.

3. Go to the **History** section to view system history. By default, only those actions for the open document display. Use the filter to view the history for the associated documents. **Note:** If the document is displaying in the Updated view, history is accessed from the **History** link to the right of the **Actions** menu in the top-right corner of the screen.

Order Changes

Change Order via PO Revision

Overview

Note: This task focuses on creating a change order by resending the PO to the supplier. Currently, there is limited functionality that allows you to request a change order without having to revise the PO. For information about this task, please see "Change Requests" on page 291

You may need to make changes to a completed purchase order and/or resend this information to the supplier. You cannot change the supplier for a completed purchase order, but you can make the following changes to a completed PO:

- Distribution Options - Fax or email, terms and conditions, order acceptance instructions
- Supplier notes and attachments
- Ship to and Bill to Addresses
- Payment Terms
- Changes in Quantity
- Adding or Removing line items

When you resend the purchase order to the supplier, you can choose whether to create a PO revision, which increments the revision number by 1, or to send the revised purchase order to a supplier without creating a revision.

> **Note**: The original completed PO is given a revision number of 0. A new revision is created by resending a PO to a supplier or if changes are marked as a revision. The revision # for a PO is displayed in PO History.

Related Permissions

There are two specific permissions required to make revisions and resends: **Revise PO** and **Resend PO to Supplier**. Although these two permissions can be granted individually, they are typically granted together.

Permission	Description	Location
Revise PO	Allows a user to revise a purchase order once it has been sent to a supplier. This may be necessary in the event that there is a minimum quantity required or if the price changes, etc. This permission does not include the ability to resend a PO to a supplier. Users with this permission will see in Purchase Order History editable fields on the Summary and Details tabs, the Finalize Revision action in header Action list, and the Revisions tab.	Permission Settings > Orders > My Orders/Organization Orders
Resend PO to Supplier	Allows a user the same permissions as Revise PO as well as the ability to resend purchase orders to suppliers via fax or email. Resending a PO automatically creates a revision.	Permission Settings > Orders > My Orders/Organization Orders

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Resend a PO and Create a Revision

1. Search, locate, and select the **purchase order** you want to revise.

2. In the Purchase Order > **Summary** tab, make the necessary edits to the purchase order and save your changes.

3. Finalize the revision by clicking the drop down menu icon ⯆ next to the header at the top left corner of the page and select **Finalize Revision**.

4. A pop-up window displays that allows you to enter the revision description and details, which displays in the **PO History**.

5. Enter the **Revision Name** (required), a **Note** (displays in PO History), and indicate whether you would like it re-sent to the **supplier** or via your **Supplier Export** (if applicable).

6. Click **Save**. A confirmation message displays.

7. The revision information can be viewed from the **Revisions** tab.

Resend a PO Without Creating a Revision

The **Resend PO to Supplier** permission is needed to perform this task. POs can only be sent one at a time from an open PO.

1. Search for and select the **purchase order** you want to resend. It must be in a workflow status of **Complete**.

2. Click the drop down menu icon ▼ next to the header at the top left corner of the page and select **Resend to Supplier**

3. Complete these fields in the Resend Supplier window. Any information added here will be logged in the PO's history:

   - **Reason** - Select a reason from the drop down list.
   - **Comment** - Enter notes about why the PO is being resent to the supplier.

4. Click **Submit**. The PO is re-sent to the supplier. The revision number is NOT updated. If the PO was sent using multiple distribution types (i.e. fax, email, cXML) all versions will be resent, including cXML.

Change Requests

Overview

The Change Request feature allows you to make changes to a purchase order, and the change request is sent through an approval workflow so that it can be approved. Items that are changeable on a PO include line items, splittable or grouped custom fields, billing information and shipping information. However, each of these groups must be enabled by your organization. It is possible that only some of these entities are changeable. The delivery fields Expedite, Ship Via, and Requested Delivery Date are always editable. Change requests can be created for POs that have completed workflow but still have an Open AP status (for organizations that invoice through JAGGAER) or PO status.

Related Permissions

These permissions are needed to submit change requests. The permissions are not available on your site if the change order feature is not enabled.

Permission	Description	Location
Send Change Request Comment	Allows users to send a change request comment. For users who have permission to create change requests, this allows them to communicate that a change is going to be made to a PO. For users who have ONLY this permission, and not permission to create a change request, this allows them to communicate change information on the PO. Change request comments are stored on the Comments tab/screen of a purchase order document.	Permission Settings > Orders > Change Requests
Create a Change Request for My Orders	Allows users to create change orders only for their own orders.	Permission Settings > Orders > Change Requests
Create a Change Request for Orders in My Department	Allows users to create change orders for all orders created for their department.	Permission Settings > Orders > Change Requests
Create a Change Request for Orders within My Department Access	Allows users to create change orders for all orders for which they have Department document search access.	Permission Settings > Orders > Change Requests
Create a Change Request for Orders in My Business Unit	Allows users to create change orders for all orders created for their business unit.	Permission Settings > Orders > Change Requests
Create a Change Request for Orders within My Business Unit Access	Allows users to create change orders for all orders for which they have Business Unit document search access.	Permission Settings > Orders > Change Requests
Create a Change Request for Any Order	Allows users to create change orders for all orders within the organization.	Permission Settings > Orders > Change Requests
Edit External Communication Settings	Users with this permission can override the organization's default settings for the External Communication Options fields on individual change requests.	Permission Settings > Orders > Change Requests
Delete Draft Change Request on My POs	If a PO owner has this permission they can delete change requests created by another user on their own purchase orders.	Permission Settings > Orders > Change Requests
Delete Draft Change Request that is within my Document Search Access	If an administrator has this permission, they can delete change requests in Draft status on any purchase order they have access to.	Permission Settings > Orders > Change Requests

Permission	Description	Location
View/Use Non-Catalog Item	Allows users to add a non-catalog item to a change request.	Permission Settings > Shopping, Carts & Requisitions > Shopping

These permissions are needed to delete change requests.

Permission	Description	Location
Delete Draft Change Request on My POs	PO Owners with this permission can delete a change request created by another user if it is Draft status.	Permission Settings > Orders > Change Requests
Delete Draft Change Request that is within My Document Search Access	Administrators with this permission can delete change requests in Draft status on purchase orders they have access to.	Permission Settings > Orders > Change Requests

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Create a Change Request

Change requests can be created for purchase orders that have completed PO workflow but still have an Open AP status (for organizations that use JAGGAER Invoicing) or PO status.

1. Search for and open the appropriate purchase order.

2. Click the drop down menu icon ▼ next to the header at the top left corner of the page and select **Create Change Request**.

    If you have the **Send Change Request Comment** permission, an overlay displays to enter the comment. If the overlay does not display, please proceed to step 4.

    > **Note:** If there is an existing change request in Draft or Returned status, a message will indicate that the existing request will be canceled and cannot be reinstated and ask if you would like to proceed with creating a new change request. If you proceed, a new change request is created. The change request that was in Draft or Returned status is canceled and the History is updated. Once a change request is canceled, it cannot be reinstated.

3. Configure the change request comment.

    a. Configure the email recipients. The screen will automatically display the Prepared By user, users who have approved workflow steps and users who have made comments on the PO. You can select from those users and/or click the **add email**

recipient... link to include more users. Email recipients will automatically receive a system email with the change order text configured in the next field.

   b. Enter a description of the change in the text field.

   c. Add and configure any attachments.

   d. Click **Create Change Request**. The comment is stored on the PO document and notification is sent to the email recipients. **Note:** If you do not have permission to create an actual change request, the remaining steps do not apply.

4. The change request document displays. Before making changes, review the options for resending the PO after a change request has been made that are available on the **Summary** tab. These options are set on the organization level, but users with the appropriate permission can change them for a specific change request.

   - **Resend to Suppliers on Change Request** - Set this flag to true to send a PO back to the supplier when a change request is created. When this field is set to true, the PO will be re-sent to the supplier. A flag is set when the change is merged to the PO. When the PO goes through the export step, the step will abide by the flag and resend the PO to the supplier.

   - **Resend to ERP System Connections on Change Request** - Set this flag to true to send a PO back to an ERP system when a change request is created. When this field is set to true, the PO will be resent to an ERP. A flag is set when the change is merged to the PO. When the PO goes through the export step, the step will abide by the flag and resend the PO to the ERP that you select. ERP options are displayed below the field. Click the appropriate checkboxes for each ERP to which the PO should be re-sent.

5. The document configuration is similar to that of a purchase requisition. Because of this, several options are available. However, only ship-to and bill-to information, delivery fields, accounting codes, and line items are editable. In addition, one or more of those items may not be changeable depending on how your organization is set up. Information about changing each of these four groups is below. If your organization's site is not set up for one of these entities, the Edit options will not be present.

Change Shipping Information

1. Click the **Summary** tab.

2. Locate the **Shipping** section and click the edit icon 🖊.

3. Update address information in one of the following ways:

- Edit the **Attention** field (Attn) and the **Department** field for the currently assigned address by typing new information in either field.

- Select a different shipping address by selecting the radio button next to the appropriate address listed under the current address.

- Use the **Search additional** field to find additional addresses for selection. Type in the field or click the search icon 🔍 to initiate the search. The address list will update and you can select the appropriate address.

4. Click **Save Changes**.

Change Billing Information

1. Click the **Summary** tab.

2. Locate the **Billing** section and click the edit icon ✏.

3. Update address information in one of the following ways:

   a. Edit the **Contact line 1** field for the currently assigned address by typing new information in the field.

   b. Select a different shipping address by selecting the radio button next to the appropriate address listed under the current address.

   c. Use the **Search additional** field to find additional addresses for selection. Type in the field or click the search icon 🔍 to initiate the search. The address list will update and you can select the appropriate address.

4. In the **Billing Options** section, the **Accounting Date** field displays the date from the PO field. If permitted by your organization, the date can be changed, otherwise this is a read-only field.

5. Click **Save Changes**.

Change Delivery Information

The delivery fields **Expedite,Ship Via**, and **Requested Delivery Date** are editable. Where they are located on a change request will depend on your organization's setup. Changed values are merged back to the PO when the change request is submitted for approval.

1. Locate the **Expedite**, **Ship Via**, or **Requested Delivery Date** field.

2. Click the edit icon ✏ in the section where they are located.

3. Change field values as needed.

4. Click **Save Changes**.

Change Accounting Codes

In order to make changes to splittable or grouped custom fields, the same custom fields must be available on both the PO and Requisition documents. A warning displays when this is not the case. Please contact your system administrator to have this corrected.

1. Access accounting codes by clicking the **Summary** tab. Locate the Accounting Codes section and click the edit icon ✏.

2. Edit the accounting codes as necessary. It is possible that the user creating the change request is not the original requisitioner, and that user may have access to account codes/values that the original requisitioner did not. In that case, the change request user can access those account code/values. Conversely, if the user creating the change request does not have access to the account codes/values on the requisition, that user can still manage that information.

Copy Account Codes

Users can select which account code elements they want to copy from one line to other lines (or header to lines) on a change request as follows:

1. Open the **change request** to update.

2. Locate the **line item** to copy account codes **FROM** and click the copy icon ⧉.

∧ ACCOUNTING CODES			Values have been overridden for this line ⧉ ✏ 🗑		
Project Code	Department	Cost Center	Location Number	Location Area 10	Budget Date Ranges
10	DEV Development	1000 Research	*no value*	*no value*	2023-1 First Quarter

3. The **Copy To Other Lines: Account Codes** overlay opens. Account codes from the source line are displayed in the top section and the lines they can be copied TO are displayed in the bottom section. All account codes are selected by default and a green check ✓ is displayed next to them.

4. In the top section of the overlay, users can **un-check** the account codes they *don't* want to copy by clicking the green checkmark next to it to de-select it. A blank checkbox is displayed next to the account code. If an account code has a blank checkbox next to it, it will not be copied. If it has a green checkmark next to it, it will be copied.

5. In the bottom section of the overlay, users can **select the checkbox** next to each line that they want to copy the account codes **TO.**

6. Click **Copy**. All the accounting codes selected from the source line are copied to the selected lines.

> **Note:** The first time account codes are copied, an overlay will ask if you want to set the selection as your default. Select Yes if you want the same account codes to be selected each time you copy account codes, otherwise select No. If you select Yes, the overlay is only displayed again if the your default account code selection is changed.

Keep these things in mind when copying account codes:

- The copy merges the selected account codes with those on the destination line (rather than overriding them). If a value is unchecked on the line of origin, the destination line will keep the value it already had for that code

- The system will check parent/child relationships on account codes to ensure the relationships are maintained.

  - If a user's selection is a child value, all parent and grandparent values are automatically selected.

  - If the parent is unselected, any selected children of that parent are also automatically unselected.

Change Notes and Attachments on Change Requests

External and internal notes and attachments from the purchase order are displayed on the associated change request when it is created. Users with the appropriate permissions can add, edit or delete external and internal notes and attachments. Any saved changes or additions to the notes or attachments will be merged to the purchase order.

Updating Notes on a Change Request

On the **Summary** tab of change requests, all notes that are present on the purchase order are displayed on the change request. They can be edited by clicking the edit icon 🖊 on the **Internal Notes and Attachments** or **External Notes and Attachments** section to open the overlay and edit the notes.

The updated notes are displayed on the **Summary** tab of the change request and the changes are logged in the document History. Once the change request completes workflow and is merged to the purchase order, the header-level notes on the PO will match those on the change request.

Updating Attachments on a Change Request

All attachments that are present on the purchase order are displayed on the change request. Changes to attachments are displayed on the **Summary** and **Attachments** tabs of the change request and logged in the document History. Once the change request completes workflow and is merged to the purchase order, the header-level attachments on the PO will match those on the change request.

> **Note:** This functionality is only available to change request users who have the **Header-level external attachments** or **Header-level internal attachments** permissions (Permission Settings > Shopping, Carts & Requisitions, under the Cart/Requisition subheading).

Add an Attachment

- An **Add** hyperlink is available in the **Internal Notes and Attachments** and **External Notes Attachments** sections on the **Summary** tab of change requests. When clicked, the attachment overlay opens and users can add an attachment or link to the change request.
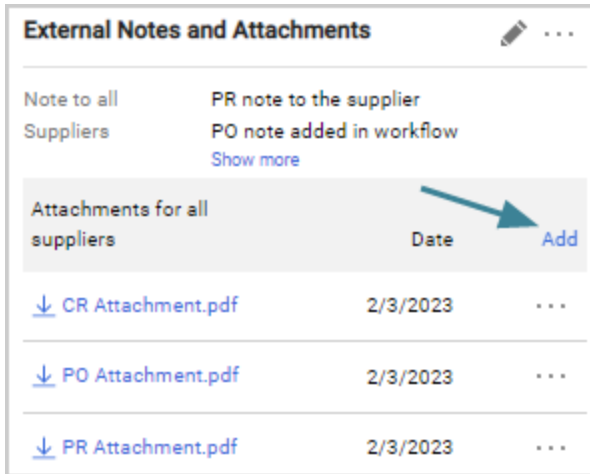
- Attachments can also be added, moved and removed in the **Attachments** tab.
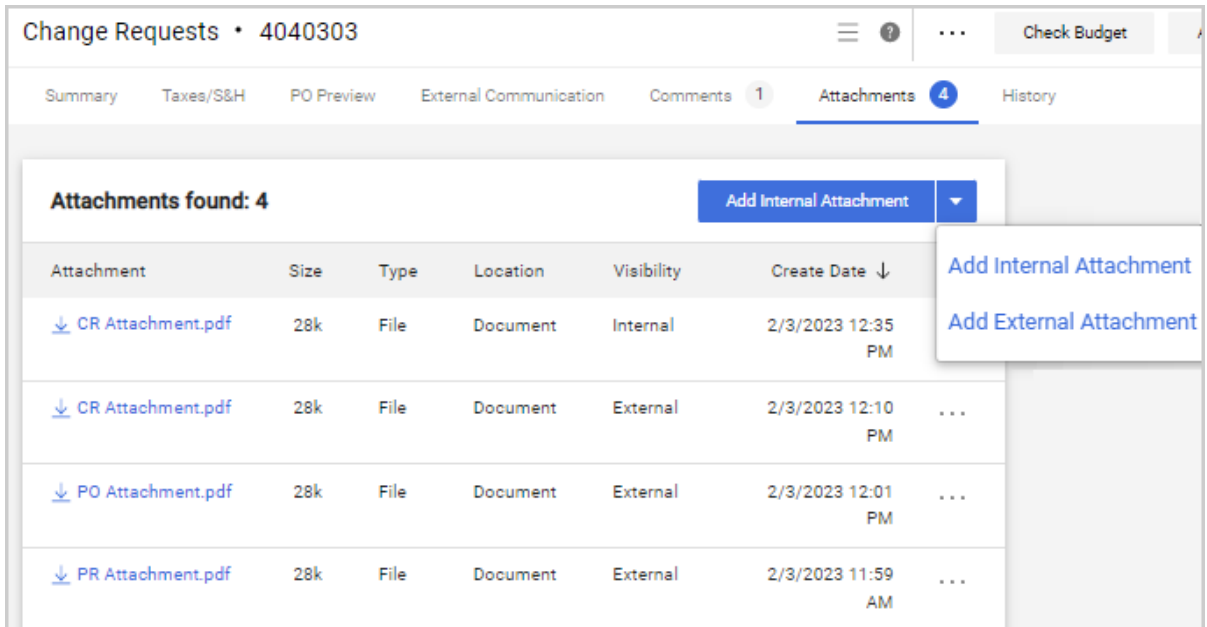
Remove or Move an Attachment

- On draft change requests, attachments can be removed or moved by clicking the action icon •••in the Notes and Attachments section. When clicked the user has two choices:

  - When **Remove** is selected, users will be prompted to confirm they would like to remove the attachments.

  - When **Move to Internal Attachments** or **Move to External Attachments** is selected, the attachment will move to the appropriate section.

Add a Non-Catalog Line Item

Users with the View/Use Non-Catalog Item permission can add non-catalog items for suppliers.

1. On the **Summary** tab, access the **Lines** section.

2. Locate the supplier for which you are adding the item.

3. Click **Add non-catalog item for this supplier...**

4. Enter the information for the non-catalog item.

5. Click **Save and Close** to save the item and return to the change request. Click **Save and Add Another** to save the item and add another non-catalog item.

Change Line Items

Important: It is possible for a PO to have an AP status of Open and to also have lines that have been fully or partially invoiced. A line that has been fully invoiced cannot be changed and therefore will not display with the line items on the Summary screen. If a line has been partially invoiced only the quantity that has not been invoiced can be changed. Therefore, the line will display on the Summary screen but will only reflect the quantity that has not yet been invoiced.

1. Click the **Summary** tab.

2. Scroll down to the **Items** section.

3. Click the edit icon 🖊 next to the line you are changing.

4. Make changes to the editable fields and click **Save**. If you have changed the quantity of an item, the document totals are updated.

Cancel/Uncancel/Remove Line Items

The 🚫 icon is displayed on canceled lines and removed from uncanceled lines. Removed lines are immediately deleted. Once the change request is submitted and pushed through workflow, canceled or uncanceled line item changes are merged back to the purchase order. Comments are displayed in the Comments section of the Change Request, and on the PO once the changes are merged back to the PO.

1. Click the **Summary** tab.

2. Scroll down to the **Items** section.

3. Select the checkbox next to the **lines** you want to cancel, uncancel or remove.

4. Click the drop down menu ▼ at the top of the Items section and select either **Cancel Selected Items**, **Uncancel Selected Items** or **Remove Selected Items**.

5. If you are canceling or uncanceling a line item, enter a comment in the overlay and click **OK**.

6. Click **Submit Request**.

Submit Change Requests for Fully Invoiced Lines

Organizations can choose to allow fully invoiced PO lines on change requests. If your organization has enabled this setting, users with permission to create change requests can view and edit fully invoiced lines on change requests as follows:

> **Note:** This setting only applies to fully invoiced lines, over-invoiced lines are always allowed.

1. Open the purchase order that needs the change request. It must be in a Completed state and the A/P status must be open.

2. **Create a change request** by clicking the add icon ✛ on the **Change Request** tab, or clicking the actions icon ••• near the top right corner of the page and selecting **Create Change Request**.

   The change request is created. A message in the right sidebar indicates that the change request has fully/over-invoiced lines, a warning on the line item indicates the line is fully invoiced, and an action is recorded on the History tab.

3. Click **Submit Request** to create the change request. Once the change request completes workflow, the changes are merged back to the purchase order.

Delete Change Requests Created by Other Users
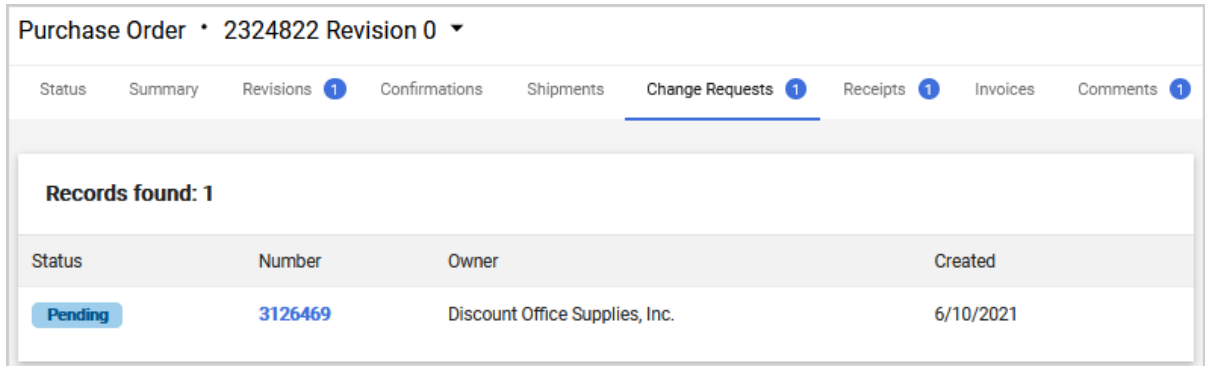
1. Search for and open a **purchase order** that you are the owner of, or that you have access to as an administrator.

2. Click the **Change Requests** tab. A Delete button is displayed next to change requests created by another user that are in Draft status.

3. Click the **Delete** button next to the change request you want to delete. The Delete Change Request window opens.

4. Complete these fields in the **Delete Change Request** window:

   - **Email notifications** - The names of the **Prepared for** user and the **Prepared by** user are displayed. Select checkbox next to the users that you want to notify of the change request deletion.

   - (optional) Enter **comments** in the blank field. Comments are displayed on the purchase order Comments tab and in the body of the email notification sent to the selected recipients.

   - (optional) Add an **attachment** by completing the Attachment Type, File Name fields, then click Choose File and select an attachment.

5. Click **Delete Change Request**. The change request is deleted and the selected users are notified of the deletion. All actions are recorded in History.

Supplier Change Requests

Buyers often get contacted by suppliers about orders because they need to make a change, such as an update to the delivery date or item quantity. If your organization has activated supplier change requests, suppliers can create change requests for updates to item quantities, delivery dates, or prices on a purchase order and submit them to a buyer. Buyers can approve or reject the proposed changes in the application through the normal change request approval process.

How It Works

- If this feature is enabled for an organization, change requests can be sent by suppliers from the supplier portal to request changes to a purchase order item's delivery date, unit price, or quantity.

- Buyers can subscribe to the **Supplier Change Request Submitted into Workflow** notification (Notification Preferences > Change Requests) to be notified that a supplier has submitted a change request for one of their purchase orders.

- When a supplier submits a change request from the supplier portal, a corresponding change request is created in the application and populated with the information sent in the supplier's request.

- Supplier change requests are different from regular change requests:

  - The **Prepared by** field displays the supplier user name. The **Prepared for** field displays the PO owner. The reason for the change request entered by the supplier is displayed on the Comments tab.

  - The change request is automatically placed in workflow so that a new order revision can be generated (i.e., there are no supplier change requests in Draft status). Buyers can approve or reject the proposed changes, but supplier change requests cannot be returned.

- If there is a change request for a purchase order in Pending status on the buyer side, suppliers cannot send a change request. If there is a change request in Draft or Returned status, suppliers can send a change request, but a message will indicate to them that the Draft or Returned change request will be canceled and ask if they want to continue.

- Supplier change requests that have not completed buyer side workflow can be withdrawn by the supplier from the supplier portal. The change request tab of the PO on the buyer side will show the Withdrawn status of the change request and the change request details will also reflect the updated status.

Change the Purchase Order Owner

Overview

A Requisitioner becomes the Purchase Order Owner when the purchase order is created. When invoices are created from the purchase order, the Purchase Order Owner then becomes the Invoice Owner.

In some situations the Purchase Order Owner needs to be changed to allow for Invoice Owners to be updated to a new owner as new invoices are created against the purchase order. Standing purchase orders would be an example of where the Purchase Order Owner might need to be changed.

Users with the **Update Purchase Order Owner** permission can edit the Purchase Order Owner. Once a Purchase Order Owner is changed, subsequent invoices will reflect the updated owner.

Users with the permission will see the option to **Change PO Owner** in the available actions when viewing the list of purchase orders via an Orders search or in Approvals.

- The action is not available when viewing a single purchase order.
- The purchase order can be in any status.
- The purchase order does not have to be assigned to the person making the change (in the case of PO's pending approval).

When selecting the option to **Change PO Owner** and **Go**, an overlay displays. You will select the new purchase order owner, and confirm the purchase orders to be changed. Once completed, a confirmation message displays. History for the purchase order captures that the PO Owner was updated, who made the update, and the previous and current owner.

When viewing the purchase order document, an information icon 🛈 displays beside the Owner Name. Selecting the icon displays hover text indicating the owner was changed with a link to **View History** for the document.

If you perform a PO revision after the owner has changed, the new owner will be reflected in the revision (and potentially exported if your organization utilizes that integration).

Related Permissions

Users with the **Update Purchase Order Owner** permission can edit the Purchase Order Owner. Once a Purchase Order Owner is changed, subsequent invoices will reflect the updated owner.

Permission	Description	Location
Update Purchase Order Owner	Allows a user to update the Purchase Order Owner. For example, if someone else takes over the work group or leaves a company, any future invoices created against that Purchase Order will belong to the new owner.	Permission Settings > Orders > My Orders/Organization Orders

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Updating Business Units and Departments

When the Purchase Order Owner is changed, the Business Unit and/or Department may need to be updated. Organizations can choose to configure two new settings to automatically change the Business Unit and/or Department on the purchase order based on the new Purchase Order Owner. The settings are available at **Setup > Configure Documents > General Document Configuration Settings: For Purchase Orders when the Owner is modified**:

- **Set the Business Unit to the Owner's Business Unit** - With this option enabled, the Business Unit on the purchase order will be updated automatically to the unit assigned to the updated Purchase Order Owner. Without this option enabled, the business unit can be updated manually on the purchase order document.

- **Set the Department to the Owner's Department** - With this option enabled, the Department on the purchase order will be updated automatically to the department assigned to the updated Purchase Order Owner. Without this option enabled, the department can be updated manually on the purchase order document.

Purchase Orders and Change Requests

The name that is displayed in the **Prepared for** field on a change request will depend on your organization settings. By default the name in the field on a change request is populated from the "Prepared for" name on the originating requisition. Organizations can choose to enable the **Set the Prepared For User to the PO Owner** setting if they want to use the Owner Name from the purchase order to populate the "Prepared for" field on a change request. See Change Request Setup for additional information.

Purchase Orders and Invoices

For organizations utilizing Invoicing, purchase orders may be associated with invoices. New invoices created from the purchase order will inherit the new owner. The Invoice Owner for existing invoices associated with the purchased order will NOT change. However, users with the

appropriate permission can update the Invoice Owner. If the purchase order is associated with any active recurring invoices, the user will have the option to update the invoice owner to the new purchase order owner. See "Changing the Invoice Owner on PO-Invoices" in the **Invoicing Handbook** or online searchable help for additional information.

Search for Purchase Orders with Modified Owners

Users can search for purchase orders with modified owners by using advanced document search. When viewing the advanced search for purchase orders, select to search for documents **With Modified Owner** under the **Status Flags** section.

1. Find the purchase order to be changed via Document Search (Orders > Search > Purchase Orders).

2. In the search results, click the actions icon ••• next to the purchase order you want to change, or click the icon in the header and select multiple purchase orders.

3. From the actions menu ••• , select **Change PO Owner**. An overlay displays.

    a. Begin entering a user's name, username, or email, or select the search icon to search for users.

    b. Enter a comment indicating why the change is being made.

    c. Expand **Selected Purchase Orders (x)** to verify the purchase orders being changed. Deselect any of the purchase orders you do not want to change to the new owner.

    d. When you have confirmed the new owner and purchase orders to be changed, click **Save Changes**. A confirmation message displays, indicating the change may take several minutes to take effect.

    e. If the purchase order is associated with any recurring invoices, you will be given the opportunity to confirm a change to the Invoice Owner as well.

4. If the organization has enabled the configuration to automatically update the Business Unit and/or Department based on the new Purchase Order Owner, the Business Unit and/or Department are updated as well.

5. History for the document reflects the changes.

6. The purchase order document indicates the Owner Name with an information icon, indicating a change was made from the original owner.

Admin and Shopping Settings

Order Consolidation

Overview

Order consolidation is an OPTIONAL process that some organizations choose to save money for specific vendors. Order consolidation is only available with the Requisition Manager license, and is part of the overall approval/workflow process.

What can be consolidated?

An organization can choose "which" orders are available for order consolidation. For example, your organization may only be interested in consolidating orders from a specific vendor or for a specific commodity type. In rare cases, an organization may choose to make all orders go through the order consolidation step. This is **not** recommended due to the processing time that is required to review requisitions for consolidation.

How does it work?

With order consolidation, a new cart/requisition is created in the Order Consolidation workflow step. This task is typically performed by a buyer in the purchasing department. The appropriate items from various requisitions are added to this requisition, and the requisition is submitted. From there, the new consolidated requisition becomes a purchase order. It is important that the header information be the same for all line items in the requisition for a single purchase order to be generated from the new consolidated requisition. For example, the shipping address must be the same for all line items. This is often a major consideration when choosing whether or not to implement order consolidation.

The original requisition(s) will indicate that the line item(s) were moved to a consolidated cart AND the purchase order created will indicate both the original requisition(s) and the consolidated requisition.

Important details about order consolidation

- The goal is to create a single purchase order from the consolidated requisition. The only time this does not happen is when header information such as Ship To or Bill To address does not match for each of the line items.

- A shared workflow folder will be created by JAGGAER for handling order consolidation. Approvers must be assigned to this folder in order to move requisitions from this folder into a consolidated requisition.

- In order to create consolidated requisitions, the user must have the **Order Consolidation** permission enabled.

- The item(s) being requested may not be sent to (shipped to) the original requisitioner. In most cases with consolidated cart, a buyer's Ship To address is used. Once the item(s) arrive, they are distributed to the appropriate parties.

- Shoppers whose orders become part of a consolidated order will continue to receive notifications provided they have the notification preference enabled.

- If your organization is using order consolidation, the Dashboard reports will not display purchase requisition totals correctly because line items that have been consolidated will be included twice in the calculation.

Related Permissions

Permission	Location
Order Consolidation	Permissions Settings > Approvals > Requisition Approvals

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Consolidate Orders

The primary task for order consolidation is for one or more buyers at your organization to create new carts to be used for consolidation, and adding items to these carts. This task should be performed on a daily basis to ensure that orders are sent to vendors in a timely fashion.

The goal is to create a single purchase order from the consolidated requisition. The only time this does not happen is when header information such as Ship To or Bill To address does not match for each of the line items.

Consolidate Orders (Create a Consolidated Requisition)

1. Navigate to **Shop** ▢ **> Admin > Consolidate Orders**.

2. Select the **consolidated cart** that you want to add items to from the drop-down menu near the top right corner of the page. If there is no existing consolidated cart, **Create New Consolidated Cart** is selected by default and a cart will be automatically created by the system when items are selected on this page. If there are multiple consolidated carts, they are listed in the drop-down menu.

3. Select the **line items** to add to the consolidated cart by clicking the ➕ icon to the right of each item. The items are immediately added to the selected cart.

4. Open and review the consolidated cart/requisition:

   a. Click the **view cart** link in the top right corner of the Order Consolidation page. The consolidated cart opens and the heading displays "**Consolidated Cart**".

   > **Note:** The consolidated cart can also be viewed as your Active cart through **Shop** ▢ **> My Carts and Orders > View Carts**. "Consolidated" will be displayed in the Type column.

   b. From the consolidated cart, go to the checkout page by clicking **Proceed to Checkout**.

   c. Review the header information for the consolidated cart to make sure the shipping and billing information is the **same for all line items**. If this information is different for a line item, multiple purchase orders will be created by the system. You can use the **copy to lines** option to populate line items with information from the header.

5. Once all items have been added to the consolidated cart and header information reviewed, click **Place Order** or **Assign Cart**. Based on your organization settings, a purchase order may be created at this point, or the consolidated cart may need to go through the PR Approval workflow before a purchase order is created. A PR Approvals tab is shown on the requisition if this is the case.

Create a Consolidated Cart

In addition to the **Create a Consolidated Cart** option on the Order Consolidation page, a consolidated cart can also be created from different areas in the application.

From the View Carts Page

1. Go to **Shop** ▣ **> My Carts and Orders > View Carts**.

2. Click the **Draft Carts** tab.

3. Click the **Create Consolidated Cart** button. The newly created consolidated cart opens. Click the appropriate link to view pending requisitions or shop for items.

From Search Results

You can find requisitions that are eligible for order consolidation by performing a requisition search. This option is only available if there are no existing consolidated carts.

1. Go to **Orders** ▣ **> Search > Requisitions**.

2. Expand the **Add Filter** menu and select **Current Workflow Step** (under General Information).

3. Select the **Order Consolidation** checkbox and then select **Apply**.

4. On the search results page, click the **Create Consolidated Cart** button and you will be taken to the newly created consolidated cart. Click the appropriate link to view pending requisitions or shop for items.

Viewing Information from Consolidated Orders

An important aspect of working with consolidated orders is understanding how to recognize a consolidated order or items from a consolidated cart. The information in this section shows where consolidation information is displayed in the application.

View the Consolidated Cart / Requisition

1. Navigate to **Shop** ▣ **> My Carts and Orders > View Carts**.

2. Click the **Draft Cart** or **Assigned Cart** tab.

3. Click the **shopping cart name** of the consolidated cart. "Consolidated" will be displayed in the Type column.

4. When viewing a consolidated cart, **Consolidated Cart** is displayed in the heading. On the consolidated cart / requisition line items, you can easily see which items were added from another cart, and if there are any items that were added directly from shopping.

- Consolidated items display the consolidated icon and the original requisition number. The original requisition number can be clicked to view the requisition. (**Note:** This field must be added to your organization's cart configuration in order for this field to display).

- Once the appropriate items are added into the consolidated requisition and the requisition workflow is complete, a purchase order will be generated.

View Consolidation on Original Requisitions

As a user, you may want to track the status of your order. If one or more items were moved to a consolidated requisition, this information can be tracked from the original requisition.

Open the original purchase requisition. If an item was moved to a consolidated cart it is indicated in these locations:

- On the **Summary** tab, the Status field displays **Pending (Order Consolidation)** while the consolidated order moves through workflow. The status will change to "Completed" once the consolidated order has completed workflow and if all other lines on the requisition have also completed workflow.

- The **History** tab will indicate if a line item was "moved" from an original requisition into the consolidated requisition. Users can see the number (ID) for the new requisition where the item resides.

Line No ▲	Date/Time ●	User ▲	Step(s)	Action ▲	Field Name ▲	From	To
	9/1/2020 3:53 PM	System		Requisition approval process completed			
	9/1/2020 3:52 PM	Brynn Wilson	Order Consolidation	Requisition approved			
	9/1/2020 3:52 PM	Brynn Wilson	Order Consolidation	Requisition assigned			
Line 1	9/1/2020 3:36 PM	Brynn Wilson		Requisition Line item consolidated	Consolidation Requisition No.	*empty*	2677123

Note: On the consolidated requisition, the History tab will not indicate "where" the items came from (i.e., the originating requisitions).

View Consolidation on Purchase Orders

In the **purchase order search results**, purchase orders created from a consolidated requisition will display all the numbers of the associated requisitions. To help with search results, it is recommended to indicate the supplier at a minimum, and if there is only one individual at the organization who is responsible for consolidating orders, also enter their name in the user search.

	PO Number ▼	Supplier	Created Date/Time ●	PO Status	Requisition Number
•••	3508729	Staples Advantage (formerly Corporate Express) ❶	4/3/2023 4:21:47 PM	Pending	4113904 4113900 4113902

When you open a purchase order created from a consolidated requisition, BOTH the **consolidated** requisition and **original** requisition(s) will be listed. The consolidated requisition is listed first in the Requisition Number field, and is indicated with the consolidated icon ↦. The original requisitions are listed below the consolidated requisition. All requisitions can be viewed by clicking on the **view** link.

On **line items** in the purchase order, the consolidated requisition is listed first and is indicated with the consolidated icon ⚙. The original requisition is listed below.

View Draft Carts of Other Users

Overview

Users with the appropriate permissions can view and/or delete the draft carts of other users.

View options are useful when, for example, a user may call the Help line in the Purchasing Department and the support staff can see the user's screen. When viewing the draft cart the support staff will be looking at a read-only view of the user's cart and can assist the users with any questions they may have about completing their cart.

Delete options are useful if, for example, there are old draft carts that need to be cleaned up.

Related Permissions

Permission	Description	Location
View other user's draft carts	Allows a user to view draft carts that belong to other users.	Permission Settings > Shopping, Carts & Requisitions > Cart/Requisition
Delete other user's draft carts	Allows a user to delete draft carts that belong to other users	Permission Settings > Shopping, Carts & Requisitions > Cart/Requisition

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

View Draft Carts of Other Users

The **View other user's draft carts** permission is required to perform this task.

When viewing another draft cart, you are presented with a read-only view of the cart and its contents.

1. Navigate to **Shop** ▣ **> Admin > View Draft Carts from Other Users**. The Other Draft Carts page opens.

2. (optional) Enter search criteria in the filter fields to narrow your search results. Leaving the filter fields blank will show all draft carts.

3. Click **Filter**. The draft carts that are displayed respect the business unit and department settings on the user's profile.

Delete Draft Carts of Other Users

The **Delete other user's draft carts** permission is required to perform this task.

1. Navigate to **Shop** ▣ **> Admin > View Draft Carts from Other Users**. The Other Draft Carts page opens.

2. (optional) Enter search criteria in the filter fields to narrow your search results. Leaving the filter fields blank will show all draft carts.

3. Click **Filter**. A **Delete** button is displayed in the **Action** column next to each draft cart.

4. (optional) Use the links in the **Shopping Cart Name** and **History** columns to view more information about a cart.

5. Click the **Delete** button next to the Draft cart you want to delete. Only one cart can be deleted at a time. Locked carts cannot be deleted.

6. Click **Yes** in the confirmation window.

Note: There is no History tab for this feature.

Assigned Cart Setup

Overview

Some organizations set up different "levels" of users where some of the users simply shop for items, but do not submit the cart. This is a nice feature, especially when the individuals ordering the items do not know the appropriate accounting codes or billing and shipping addresses.

From a terminology perspective, **shoppers assign carts to an assignee**. An assignee represents a requisitioner or approver who can submit the cart. Once the cart is submitted, it becomes a requisition and the workflow process is initiated. A shopper can assign a cart without all of the required information populated such as shipping information. In order to submit a cart, all required data must be entered.

With the standard setup, when assigning a cart to a user, one of the following occurs:

- If a default assignee is defined in the user's profile, this user displays by default. This selection can be defined by an administrator or the user if the user has the **Edit User's Cart Assignees** permission. **Note:** It is also assumed that the user has the **Assign Cart to Another User** permission enabled.

- If the assignee is not predefined, the user can click the **Click from Profile values** link to select from the user(s) set up in the user's profile, which may or may not be set up by an administrator. If no values are set up in the profile, this option does not display.

- If the assignee is not predefined, the user can click the **Search for an assignee** link to select from a list of available assignees. In order to be listed as an assignee, the user must have the **Prepare Req for Another User** permission. **Note:** In order to search for an assignee, the user must have both the **Edit my Profile** and **Edit User's Cart Assignees** permission.

To learn more about the assign cart functionality, see "Assign and Review Carts" on page 215.

Related Permissions

Permission	Location
Assign Cart to Another User	Permission Settings > Shopping, Carts & Requisitions > Cart/Requisition
Manage Assigned Carts	Permission Settings > Shopping, Carts & Requisitions > Cart/Requisition
Edit User's Cart Assignees	Permission Settings > Shopping, Carts & Requisitions > Cart/Requisition

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Setup for a Shopper

Shoppers are typically allowed to shop, but cannot place an order, and instead are allowed to assign a cart to an assignee. A shopper can be selected from a predefined list of assignees (determined by an administrator or the shopper depending on setup), or can search. **Note:** These must be set up by an administrator:

- **Hosted Catalog Search** and **Punch-out** - These permissions are typically granted for shoppers.

- **Do not permit Place Order** - This permission should be enabled if the shopper should **not** be allowed to submit a cart, which is the standard setup for shoppers. In some cases, you may have a user that is a dual shopper/requisitioner where they have the option to assign the cart or submit it, and in this case, this permission should remain disabled.

- **Assign Cart to Another User** - This is in essence, the "assign cart" permission.

- **Edit My Profile** and **Edit User's Cart Assignees** - These permissions are required in order for a user to set up their own assignees via their profile or search for a user. In some cases, this option will be disabled if an administrator is setting the assignee(s) up.

Setup for an Assignee

A shopper "passes" a cart to an assignee, or requester. In order to be an assignee, the following permissions must be enabled (**Note:** These must be set up by an administrator):

- **Hosted Catalog Search** and **Punch-out** - These permissions are typically granted for assignees.

- **Prepare Req for Another User** - This permission is required (enabled) to be considered an assignee.

- **Do not permit Place Order** - This permission should be disabled so that the assignee **can** place orders.

- **Assign Cart to Another User** - This is typically turned off for assignees, but occasionally will be enabled in the case of dual shopper/requisitioner role.

Notifications

Additionally, if you – as the assignee/requester – would like to receive an initial notification when a cart is assigned to you, enable the following notification preference: **Receive PR and PO Notifications for Cart Assigned to Me**. Notification Preferences are set up via the profile.

Some organizations also have reminder notifications for cart assignment enabled. In this case, a reminder email will be sent to the shopper, assignee, or both after a specified period of time (48 hours for example), and at additional intervals. These notifications cannot be disabled by the shopper or assignee, because they serve as a necessary reminder to complete outstanding work.

Setup for an Administrator

Administrators have the ability to search or browse all assigned carts within their organization, and either reassign them to another user or unassign them and send them back to the original requester. This allows administrators to move carts that have been assigned to a user who may be unable to process them. A user must have the **Manage Assigned Carts** permission to perform this task. See Search For and Reassign Carts below.

Assign Cart by Department Setup

An option is available that allows an organization to control the list of possible "assignees" by **department** when assigning a cart to a user.

This option must be enabled by JAGGAER prior to the following configuration. With this option, when the **Click to select the assignee** link is selected, the list of possible assignees are only those users that meet the following criteria:

1. The assignee has the **Prepare Req for Another User** permission enabled (standard criteria).

2. The assignee is a member of the department – or departments – that the original requester (user) has access to via **Access** (in the user profile). The assignee's department is defined in the user profile. If a user does not have any departmental permissions assigned then they will have access to the entire organizational list of assignees. Also, the permission to view all company orders (i.e., View Organization Orders) supersedes the departmental permissions when assigning by department. For example, if a user has permission to view organization orders, they will see the entire list of assignees in the system no matter what their departmental permissions are.

With this option enabled, there are a few caveats and details to mention:

- A user's department DOES NOT determine what assignees are available to them. The department(s) assigned to the user via the **Access** settings in the user profile determines the list of assignees. Keep in mind, **Access** also controls access to documents in Document Search. For example, if the **Administration Department** is assigned to a user in Access, not only does it work to control the list of assignees, but also allows the user full access to all documents for the Administration department in Document Search.

- If a user is not assigned to a department in their profile, they will not be available as an assignee with this option enabled unless the original requester has access to **View Organizational Orders**.

Search For and Reassign Carts

Administrators have the ability to search or browse all assigned carts within their organization, and either reassign them to another user or unassign them and send them back to the original requester. This allows administrators to move carts that have been assigned to a user who may be unable to process them.

When a cart is assigned to an assignee or requester, the cart must be submitted in order for processing to begin. If a requester is on vacation or leave, he/she can assign a **substitute** requisitioner to assist with the cart submission. The substitute is able to review the cart assigned to the original assignee.

When a cart is reassigned to a substitute requester, the original shopper will be notified via email.

Follow the steps below to search for and locate carts that were previously assigned to a requisitioner, and to unassign a cart (optional step).

1. Navigate to **Shop** 🖻 **> Admin > Manage Assigned Carts**. This page is only visible if you have the **Manage Assigned Carts** permission.

   - The Assigned Carts Search displays. This screen allows you to locate one or more carts that were assigned based on either the Assignee (requisitioner) or the Submitter (original shopper).

2. Enter your search criteria by completing one or more of the fields as indicated below. the first field is required. The remaining fields are optional. **Note:** If no options are selected, all assigned carts will be displayed.

   - **Search By** (required) - Choose the **Assignee** or **Submitter** radio button to determine what "user" to search by. Select **Assignee** if the person who normally processes the orders is unavailable or busy. Select **Submitter** to see the original shopper's list of carts that have been assigned.

- **First Name** - Enter the first name of the user being searched. You can enter partial names, as long as the start of the name is present. For example, you can enter "David" or "Dav."

- **Last Name** - Enter the last name of the user being searched. You can enter partial names, as long as the start of the name is present. For example, you can enter "Ro" or "Rose."

- **User Name** - Enter the full username for the user being searched.

- **Email** - Enter the email address for the user being searched.

- **Cart Name** - Enter the shopping cart name.

- **Business Unit** - If your organization uses the Multi-Business Unit feature, select the business unit.

- **Department** - Select the department where the user resides. By keeping all other criteria options blank and selecting a department, you can quickly see what orders are pending for a specific department.

3. Click the **Search** button when the search criteria are entered. The list of assigned carts matching the query displays at the bottom of the screen.

4. From there, you can...

   - Click on the **Shopping Cart Name** to view a summary of the draft requisition (cart).

   - **Reassign a cart** - Enable the **Select** checkbox(es) for the cart(s) to reassign to a different user. Select **Reassign Selected Carts** from the drop down box, then click **Go**. Search for and select the NEW assignee, write a note to the new Assignee, and click **Assign**.

   - **Unassign a cart** - Enable the **Select** checkbox(es) for the cart(s) to assign BACK to the original shopper. From there, they can determine who they would like to assign the cart to. Select **Unassign Selected Carts** from the drop down box, then click **Go**. Click OK in the confirmation. Select **Ok** in the confirmation window.

Shared Cart Administration

Overview

The shared cart feature allows organizations to combine shopping and purchasing into shared carts for group orders. All group members are able to simultaneously shop and monitor cart contents, avoiding duplication, while alleviating workload for personnel who process multiple

individual orders. With group shopping, shared carts can also be used to achieve discounts with suppliers that provide bulk order discounting.

Related Permissions

These permissions are needed to enable the Shared Cart feature in document configuration:

Permission	Location
System Configuration	Permission Settings > Administration > System Administration

These permissions are needed to share carts and set up shared cart user groups:

Permission	Description	Location
Manage shared cart user groups	Users with this permission have visibility to the shared cart user groups tab which allows the user to create and manage user groups for cart sharing. With this permission, users can create groups and edit, add, or remove members from groups they have created. They also have the ability to see "All Groups", but can only edit groups they have created. To share carts with user groups, the user must also have the permission Share carts with others.	Permission Settings > Administration > User Administration
Administer shared cart user groups	Users with this permission have visibility to the Shared Carts user groups tab, which allows the user to create and manage user groups for cart sharing. This administration permission works the same as the Manage shared cart user groups permission but also provides the ability to change the owner of a shared cart user group and edit any shared cart user group even if they are not the group owner. To share carts with user groups, the user must also have the permission Share cart with others.	Permission Settings > Administration > User Administration

Permission	Description	Location
Share cart with others	Provides users with the ability to share carts with others. The permission makes visible a check-box on carts that gives the user the ability to turn on cart sharing and choose an existing shared cart user group to share with. Users with this permission can only choose to share carts with groups they are a member of unless they also have the permission to Manage shared cart user groups or Administer shared cart user groups, which will allow the user to share the cart with groups they have created.	Permission Settings > Shopping, Carts & Requisitions > Cart/Requisition

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Enable Shared Cart in Document Setup

Organizations need to enable an organization setting to use shared carts. When shared cart functionality is enabled, organizations can also set the shared cart lock timeout. This is the time frame after which a locked cart will be unlocked and become usable to all shoppers in a user group.

The **System Configuration** permission (**Permission Settings > Administration > System Administration**) is needed to perform this task.

1. Go to **Setup** ⚙ **> Configure Documents > General Document Configuration Settings**. The **General Document Configuration** screen displays.

2. In the **Cart Configuration** section of the tab, locate **Use Shared Cart** and click the checkbox.

3. By default, the system will set the cart lock timeout to 15 minutes. To adjust the time, click the **Override Default Values** checkbox to the far right of the **Shared cart lock timeout** field. Enter a new value in the text box.

4. Click the **Save** button to save your changes.

Creating and Managing Shared Cart Users and User Groups

Shared carts allow users within a specific group in the organization to combine shopping and purchasing in a single cart for group ordering. In order to be able to shop in a shared cart, a user must be included in a user group. For example, you may want to create a user group for shoppers

within a lab setting or a small department within your organization. All shoppers from those groups would be placed into a single user group that can share carts.

There settings at the user level determine the permissions and preferences related to Shared Cart for that user. They include:

- **Permission: Share cart with others** (Permission Settings > Shopping, Carts & Requisitions > Cart/Requisition) - This permission gives users the ability to share their carts with user groups in which they are included.
- **Permission: Manage shared cart user groups** (Permission Settings > Administration > User Administration) - This permission gives users the ability to create new shared cart user groups and manage user groups that they own.
- **Permission: Administer shared cart user groups** (Permission Settings > Administration > User Administration) - This permission is similar to managing shared cart user groups, but users with this permission can also manage user groups that are owned by other users.
- **Notification Preference: Receive PR and PO notifications for carts assigned to me** (Notification Preferences > Shopping Carts & Requisitions) - When this preference is set, users will receive notification emails for shared carts in which they participated. Users in a user groups who did not contribute to a shared cart order will not receive notifications.

IMPORTANT: In order to set up user groups, Shared Cart functionality must be enabled. For information about enabling Shared Cart, please see Enable Shared Cart in Document Setup.

Add or Manage a Shared Cart User Group

You must have the **Manage shared cart user group** permission to add a user group or manage a group that you own. You must have the **Administer shared cart user groups** permission to manage a user group that is owned by another user. These permissions are located in **Permission Settings > Administration > User Administration**.

1. Go to **Shop** ⬚ **> Admin > Manage Groups for Shared Carts**. The **Shared Cart User Groups** screen displays.

2. Existing user groups display on the left. Click on a user group to open it for editing or click the **Create New Group** button located in the top left corner. The setup area displays on the right. Configure the fields:

    - **Name** - Enter a name for the group. Be sure the name is meaningful for all users who will be part of the group.

    - **Description** - Enter a description. This is optional but we do recommend it to provide further guidance to the users in the group.

    - **Active** - Click this checkbox to make the group active.

- **User Group Members** - Add the users to the group.

  - **To add an individual user**, select the **user** link. Perform a user search. Click the select link in the search results for each user you would like to add to the group. Users will be added to the **Selected Users** field at the top of the dialog box. To remove a user click the **x** to the right of the user's name. Once you have added all users, click the **Add Selected Users** button.

  - **To add users from a department**, select the **department** link. From the **Select Department** drop-down field select the appropriate department. The department will be added.

3. Click **Save**. The group will be saved and you, as the group creator will automatically be added as a user to the group.

Configure Assigned Cart Email Reminders

After a draft cart is assigned to a user, the system can be set up to send reminder emails to that user if the cart is not being processed. This is an optional setting, and is off by default. These emails will be sent at regularly scheduled intervals as a reminder to process the order. Administrators can configure the initial interval for the reminder, an optional follow-up interval for subsequent reminders, and a reminder threshold based on the length of time the draft cart has been assigned to them. Emails can be sent to the shopper (cart originator), the cart assignee, or both parties.

The reminders are based on the date that the draft cart is assigned to the user.

You must have the **System Configuration** permission (**Permission Settings > Administration > System Administration**) to perform this task.

1. Go to **Setup** ⚙ **> User Communication > Cart Email Reminder Settings**. The **Reminder Settings** tab displays by default. This tab defines who will receive notifications and when.

2. If your organization uses business units, select the appropriate option on the left (organization default or specific business unit). Otherwise, skip to the next step.

3. From the **Send reminders to**: drop-down field, select **Shopper, Assignee, or Both**. This selection determines who you would like to receive the email reminders. As a best practice, it is recommended to select Both, so that both parties are aware of the cart status.

4. In the **Initial reminder after** field, enter the number of days after the cart has been assigned that the first email will be delivered.

5. If you would like additional reminders sent, select **Every** (radio button) and the frequency of days. For example, you may have your first reminder sent 5 days after initial assignment, then ever two days afterward. If the **Never** radio button is enabled, additional reminders are not sent past the first reminder.

6. Click **Save**.

Forms and Requests Overview

Overview

Forms and **Requests** provide another way for organizations to shop. They allow organizations to build robust and flexible forms for both catalog and non-catalog purchase of goods and services. They can be set up for use by the entire organization or shared to a select group of users (specific users, roles, departments, or business units).

Forms and Requests can also be used to request change orders for existing orders, request that new suppliers be added in the system, and more.

The use of Forms and Requests is OPTIONAL. Some organizations only allow catalog ordering (hosted and/or punch-out items). Other organizations request that all ordering outside of hosted and punch-out catalogs be captured via the Non-Catalog Item Entry screen. Organizations that want to use forms can set up a few forms or many forms depending on their preferences and business needs.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Forms vs. Requests

Forms are used exclusively to order goods and services. Forms look and feel like paper-based forms and are filled out in a similar fashion, such as the example shown below.

Instructions ⓘ

Please complete the order details shown below. Orders must be placed by 2:30pm the previous day to ensure accurate and on-time delivery.

Routing ⓘ

Existing Supplier | Manual Supplier

Enter Supplier *   [Select Supplier   🔍]

Currency   [USD   ▼]

Event Details ⓘ

Event Date *   [📅]
               mm/dd/yyyy

Event Time *   [   ]

Setup Location *   [   ]

Pick Up Options ⓘ

Pick Up Options
○ 1 hour later
○ 1.5 hours later
○ 2 hours later
○ We will call 1-2200 when ready

Menu ⓘ

Please enter the desired quantity for each item below. All sandwiches include condiments, table service, potato chips and two homestyle cookies.

Description	Unit Price	Quantity	Ext. Price
French Dip with Au Jus	7.49	5	37.45
Ham and Swiss on Wheat Bun	6.95	5	34.75
Iced Tea (pitcher for 6 people)	4.50	1	4.50
Turkey and American on a Sub Roll	6.49		
Veggie Wrap (Spinach, Tomatoes, Asiago Cheese Spread)	6.49		
		↻ Total	76.70

Total 76.70 USD

Requests can be used for purchasing requests but can also be used for requests that do not directly involve the purchase of a good or service, such as a request for an office move. Requests are filled out in a wizard-like interface. The request steps you through entering the data needed for the request, as shown in the example below.

‹ Back to View Forms

Standard Procurement R...

Form Number	**30442**
Purpose	**Procurement Request**
Status	**Incomplete**

Instructions

Details ✔

Attachments ✔

Catalog Items ✔

Review and Submit

Details   Form Request Actions ▼ | History | ?

Form Name *	[Standard Procurement Request for C]
Purpose	Procurement Request
Template Title	Standard Procurement Request for Desk Chairs
Form Type	Capital Expense

* Required

‹ Previous   Save Progress   Next ›

Form Types

Creating and Managing Form Types

Form types are used to categorize or classify forms. In some cases there is a 1:1 relationship between form type and form, and in others there may be a 1:many relationship indicating that multiple forms belong to the same form type.

The primary purpose for form types is driving workflow. For example, your organization may create a Services form type and various forms that are assigned the Services form type, such as a Catering Services Form, Consulting Services Form, and General Services Form. The form type can be set up so that any orders using the above mentioned forms will be routed to a special approvals folder.

Form types are also used in reporting. If a form is used for a line item, the form type displays in the report extract. If your organization allows non-catalog ordering, some form configurations will not allow non-catalog orders to be included on the purchase order as the configured form.

After the form type is created, you should assign the appropriate approver(s) to the form type. This is only applicable if you are using a form type for workflow routing, which must be set up through JAGGAER.

Note: In order for automatic workflow routing to occur based on form type, JAGGAER must set up a rule in your workflow process. Please contact your CSM or Project Manager for information about updating your workflow.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Create a Form Type

The **Create/Edit Forms** permission (**Permission Settings > Shopping, Carts & Requisitions**) is needed to perform this task.

1. Go to **Shop** **> Shopping Settings > Manage Form Types**. The form type tab opens. Existing forms display on the left. By default the system is populated with the commonly used form types *Capital Expenses* and *Services*, but they can be modified.

2. Choose one:

- *If you are modifying an existing form type* - Click on the **form type** to select it.

- *To create a new form type* - Click the **Create New Form Type** button.

3. Complete these fields in the **Edit Selected Form Type** panel to configure the form type:

- **Internal Name** - Enter an internal name for the form type. This field is used to develop workflow rules around the form type, therefore it cannot be changed once the form type is saved. In most cases, the internal name is the same as the Display Name or a simplified version of it.

- **Display Name** - This is the name that will display to end users in the application. The Internal Name and Display Name can be the same value.

- **Is for check request or credit memo request forms** - Enable this checkbox only if the form type will be used for check requests or back-end payments. **Note:** This option is only available at the time the form type is created and cannot be changed later. See also the Non-Catalog Ordering and Forms section regarding use of this setting.

- **Do Not Mix** - Enable this checkbox to specify if this form type should not be mixed with other form types in a cart. This is useful to an organization when they want to allow a specific form type to be added to a cart by itself and not allow other forms or catalog items to be added. For example, you may not allow other forms or items to be added when using the **New Supplier Request Form** or the **Check Request Form**.

- **Active** - Click the checkbox to make the form type active and begin using the form type. By making a form type active, it is available to be assigned to forms and you can assign a new or existing form to the form type. **Important!** If you are updating an existing form type, be careful about deactivating a form type. This action will deactivate all forms that are associated with it.

4. Click **Update**. The configurations will be saved.

5. Set up dynamic workflow rules associated with the form type as indicated below.

Non-Catalog Ordering and Forms

If an organization would like to enable non-catalog ordering using a specific form, the form type must be configured as follows:

- The **Do Not Mix** setting is disabled.
- The **Is for check request forms** setting is disabled.

If either of the above settings is enabled, the user will not have the ability to add a non-catalog item to the purchase order with this form.

Set Up Dynamic Workflow Rules for a Form Type

Dynamic workflow rules allow for workflow to be triggered for the form type. Approvers are assigned to the values. In addition, multiple approval ranges can be set up within each value. For example, you might want to send a Services form type to separate approvers based on the amount of the order. You have the option to define those ranges and designate users as the approvers for each range.

1. Go to **Shop** ▭ **> Shopping Settings > Manage Form Types**.

2. In the left panel, select the **form type** you want to add dynamic rules to.

3. On the right, click the **tab** for the appropriate workflow type. Choose either **Requisitions**, **Purchase Order**, **Fulfillment** or **Invoices**. The tabs displayed depend on the workflow types that are active for your organization.

4. Click **Add Rule**.

5. Choose one of the following Routing options:

    - **Route all (no defined range)** - This is the default selection. All requisitions, PO's, and fulfillment PO's regardless of their value are routed for workflow approvals.

    - **Route within defined range** - Choose this option if you would like to use dollar-based rules to drive approvals. If this option is selected, enter the range amount to trigger approval in the Min and Max fields.

      Example: For example, you may only require approvals for the Services form type when the order is between 5K – 100K. In another example, you may require one approver for orders from 0 – 3K and a different approver for orders above 3K. In the second example, you would need to create two rules.

      > **Note:** If you are using multiple monetary ranges, repeat adding rules and approvers until you have created rules for all ranges.

6. Click **Save Rule**.

7. (optional) **Enable automatic approvals** - If this setting is enabled, this step in workflow will be automatically approved if the order was submitted by an approver of this step. Note that automatic approvals only consider the 'Submitted by' individual, not 'Submitted for'.

When approved, the step will show up in History as approved by the submitting user.

8. Assign approvers to the rule:

   a. Click **add approver...** A User Search window displays.

   b. Search for, locate, and select the approver for this form type. **Note:** You can only select from those users with approval permissions.

   c. Repeat this process to include any additional approvers.

Manage Forms (Forms Builder)

Overview

The Forms Builder allows you to create complex forms for the purchase of goods and services. In most cases, forms are designed and built during implementation, but it is sometimes necessary to add new forms or refine existing ones. Forms can be created and managed by an organization administrator. Assistance from JAGGAER is only required when forms use alters workflow.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Sample Forms

Example # 1: Business Card Form. Requisitioners can use this form to request business cards. The form allows you to select from one of two vendors, which have both been approved for this type of purchase. A graphic is provided to show the requisitioners what their business cards will look like. The form contains a number of "custom" or user-defined fields to capture information key to this request, such as the name, title, and email for the business card, and order type, which is included on the Purchase Order to tell the supplier know whether it is a reprint or a new request.

General Instructions

Business Card Policy

The following personnel are eligible for business cards:
- faculty
- professional staff (exempt)
- graduate assistants

On business cards, individuals should be identified by the official title assigned to them upon being hired. Variations on titles are permissible at the department head's discretion and with the approval of the appropriate dean.

Supplier Information

Existing Supplier | Manual Supplier

Supplier *   Example Global Megacorp, Inc.

Currency   [USD ▾]

Distribution Method *
The system will distribute purchase orders using the method(s) indicated below:
⊕ Custom Supplier Distribution selected

Order Information

Quantity   [▾]

Order Type
- ○ New (first time order) (5.00)
- ○ Reprint (no changes from last order)
- ○ Revised (includes changes from last order)

Personal Information

Name *   [Example Value]

Title   [Example Value]

Department   [Example Value]

Address *   [   ]

Card Sample

The image shown below is a sample of the standard business card.

Card Sample

Office: 555.555.5555
Mobile: 555.555.5555

John Doe
Human Resources

1 Main Street | Raleigh, North Carolina 12345

Example # 2: Catered Lunch Form. Requisitioners will use this to order from a specified supplier. Multiple items can be added at once using this form. For example, you can order for your entire department, but entering the appropriate quantity for each menu selection.

This form contains 5 sections. In addition to a variety of user-defined fields, notice the item list, which is a type of field used to make multiple selections, as in the example here.

Instructions	
Please complete the order details shown below. Orders must be placed by 2:30pm the previous day to ensure accurate and on-time delivery.	

Routing

Existing Supplier   Manual Supplier

Enter Supplier *   Select Supplier

Currency   USD

Event Details

Event Date *   mm/dd/yyyy

Event Time *

Setup Location *

Pick Up Options

Pick Up Options
- 1 hour later
- 1.5 hours later
- 2 hours later
- We will call 1-2200 when ready

Menu

Please enter the desired quantity for each item below. All sandwiches include condiments, table service, potato chips and two homestyle cookies.

Description	Unit Price	Quantity	Ext. Price
French Dip with Au Jus	7.49	5	37.45
Ham and Swiss on Wheat Bun	6.95	5	34.75
Iced Tea (pitcher for 6 people)	4.50	1	4.50
Turkey and American on a Sub Roll	6.49		
Veggie Wrap (Spinach, Tomatoes, Asiago Cheese Spread)	6.49		
		Total	76.70

Total 76.70 USD

Creating and Managing Forms

When you initially create a form in Forms Builder, you configure basic properties such as form name and description. You can create a form template to use as a starting point for the new form. You can also select a form type, which is used to determine how a form is routed through workflow.

You must have the **Create/Edit Forms** permission (**Permission Settings > Shopping, Carts & Requisitions**) to perform this task.

1. Go to **Shop** ▣ **> Shopping Settings > Manage Forms**. The forms library displays.

2. Take one of the following actions:

   - If you are updating an existing form, locate it in the forms library. Click on the **Actions** button and select **Edit**. If you would like to edit the form properties, proceed to step 6. For information about updating the form layout, please see "Manage Forms (Forms Builder)" on page 331. Please see **Guidelines for Updating a Form** below for important information about updating forms.

   - To create a new form, click the **Build a New Form** button on the top-left side of the screen.

3. Enter the information into the fields.

   - **Form Name (Required)**- Enter a descriptive name for the form.

   - **Form Description** - Enter a description for the form. The description will display along with the form.

   - **Form Type** - Select the form type to be assigned to the form. It is not required that you select a form type to create a form. However, it is required to activate a form. For information about managing form types, please see Form Types.

   - **Template** - If you'd like to use a template as a starting point for the form, select the appropriate radio button. Click the **preview...** link to view the template prior to selecting it. This option is not available if there are no forms set up as template.

4. Click **Create**. The form opens for editing.

5. Form properties provide additional configuration options to determine the function and behavior of the form. To configure the properties, click on the **Form Properties** tab.

6. Configure the fields. For information about each available field, mouse over the field name or click the **?** in the top-right corner of the Form Properties tab to access field help.

7. Click **Save**.

8. If you have completed the form layout, you can activate the form by clicking the **Activate** button located on the top right of the screen. For information about managing the form layout, please see Manage Forms (Forms Builder).

Guidelines for Updating a Form

The original version of the form is version 1. When a form is edited a new version is created automatically by the system. Although, the newest version of a form is generally the active version, it is possible to revert back to a previous version by making it active. Use the following steps:

1. Open the form and locate the **Choose Version** field on the top-right side of the screen.

2. Click the version number from the drop-down options.

3. Click the **Activate** button. This will become the active version of the form.

When you make updates to a form that include changes to any predefined fields (name, supplier selection, etc.) the form must be re-added to favorites.

Building the Form Layout

The form layout determines how and where the fields display and behave on a form.

The Form Layout Grid

In order to configure the form layout a **Form Layout Grid** is provided. The grid is similar to Microsoft Excel in that it contains columns and rows. You group similar form fields by using the columns and rows to organize them by form section and form group. You can include up to six columns in your form. There is no limit to the number of rows, but it is a best practice to have minimal rows for efficiency.

Here is an example of a form layout grid:

Create a New Form or Open a Form for Editing

You must have the **Create/Edit Forms** permission (**Permission Settings > Shopping, Carts & Requisitions**) to create or edit forms.

1. Go to **Shop** ⬚ **> Shopping Settings > Manage Forms**. Create a new form or open an existing form for editing.

2. Click on the **Layout** tab.

When creating or editing a form, click the <mark>Show Preview</mark> button at any time to see what the form will look like in the application.

Configure Form Sections

When you consider the layout of your form, picture it as a grid, similar to Microsoft Excel. Within the grid, there are sections. When defining a section, the first thing that you must do is "tell" the system where the section will "sit." A form must contain at least one section. A section tells where that particular piece of the form should span. Sections can "sit" between columns A and F – meaning there are 6 possible columns within a form.

1. Click the **New Section** button.

2. Configure the fields to define the section. Click on the **?** in the top-right corner of the **New Section** window for detailed information about each field. Please note that you can easily change the section coordinates (Top Left/Bottom Right fields) after you save it and see what it looks like on the grid. You can override the language of the title and description by clicking the **Show Languages** link and selecting the appropriate language.

3. Click **Save**. The new section displays in the Form Layout screen. In the example below, a section was created called Form Instructions that spans **A1** to **C1**.
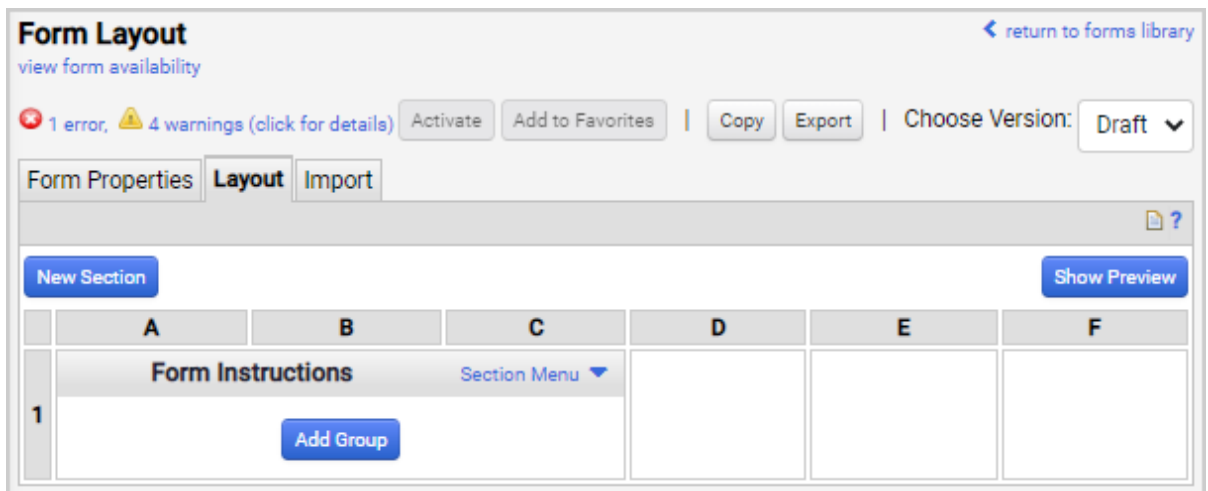
4. To make updates to a section, including changing the title, help text, or location on the form, click **Section Menu** and select **Properties** from the drop-down menu.

Configure Groups within a Section

Groups are used to determine what fields display in a section, the layout of the fields, title, and more. At least one group must be added to each section.

1. Click the **Add Group** button inside the section. Be sure to select the button within the correct group.

2. Configure the fields to define the group. Click on the **?** in the top-right corner of the **New Group** window for detailed information about each field. Please note that you can override the language of the title and description by clicking the **Show Languages** link and selecting the appropriate language. You can choose to hide or display the group title.

3. Click **Save**. The image below shows two groups in a section with the group titles hidden.

4. To make updates to a group, including changing the title, help text, assigned section, or display order, click **Group Menu** and select **Properties** from the drop-down menu.

Add Fields to a Group

After a section and group are created, one or more fields must be entered. Fields determine what information is displayed, captured, and entered by the end user.

1. In a group, click **Group Menu** and select **Add Field**. The **Field Views** window opens.

2. There are four options from which to choose fields:

   - **Unassigned Form Fields** - The first list contains all of the system-defined form fields that have not yet been assigned to a group.

   - **Create User-Defined Field (no price associations)** - Select this option to create a new form field with no price association. A variety of field types are available, including Text Box, Numeric Text Box, Text Area, Date, HTML Area, Link, and Image.

   - **Create User-Defined Field (price associations allowed)** - Select this option to create a new form field that contains a price association. The field types available from here include Unit Price, Check Box, Dropdown List, Radio Button Group, Item List, Editable Item List, Rate Item, and Flat Fee Item.

> **Note:** Some organizations allow user-defined fields with associated pricing to create document (requisition and PO) lines. If your organization allows this, you will have the option when configuring the field.

- **All Fields** - This list provides a comprehensive view of all of the available fields, including unassigned system-defined form fields and user-defined fields, both in use and available. This is the quickest way to get a snapshot of what's available for use in the form and what is currently being used.

3. Click a **field type** to add a field. A configuration window that contains the options that can be defined for the field opens.

4. Configure the options for the field. Click the **?** in the top-right corner of the **New Group** window for detailed information about each field. The options are different for each field type.

5. Click **Save**. The image below shows an **HTML Area** field added to Group One in the Form Instructions section.
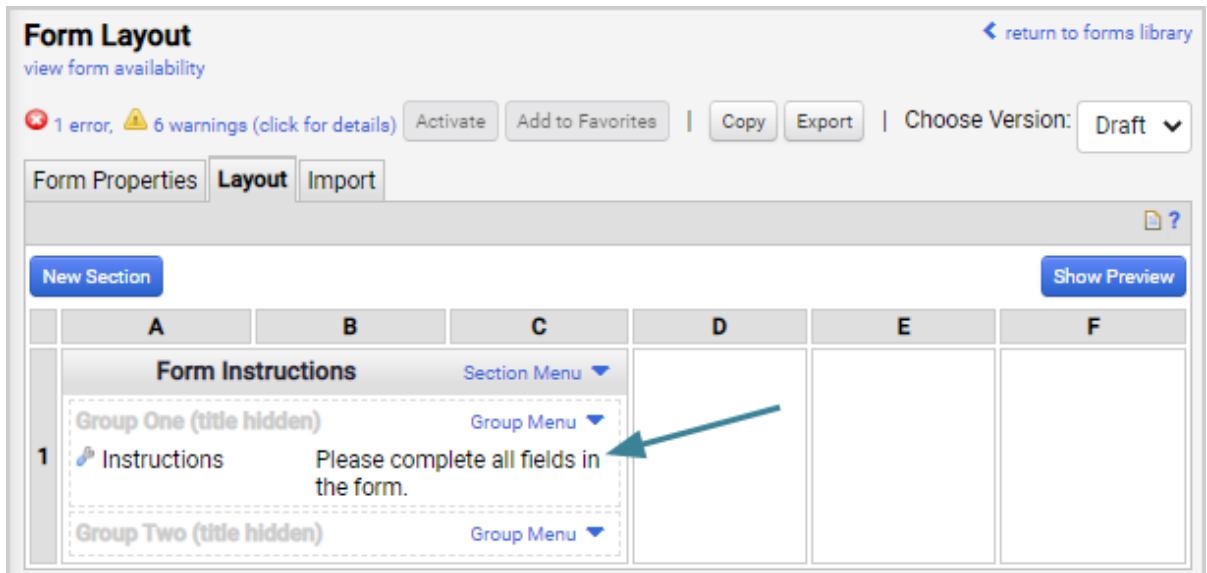
Here you can see what the same field will look like in the application when you click Show Preview.
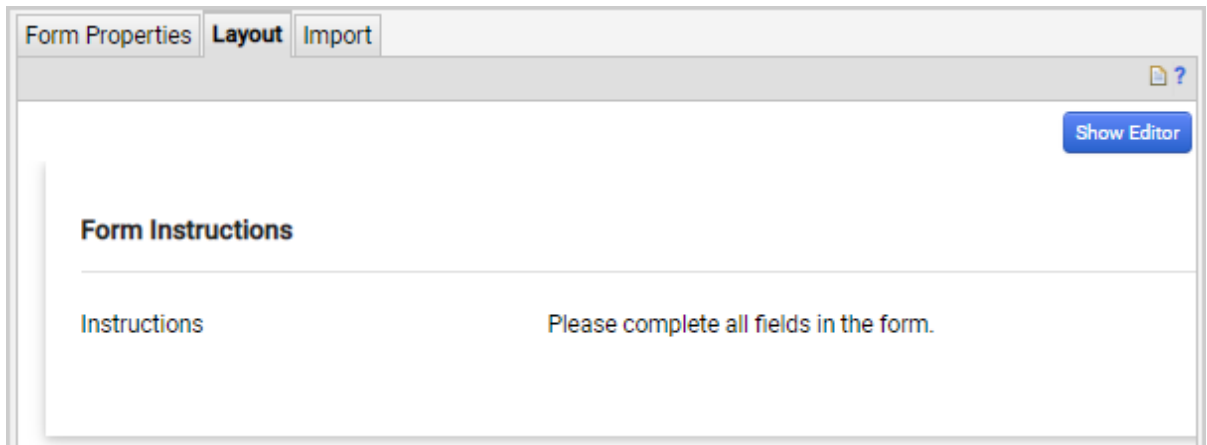
6. To make changes to a field, click the **Edit** wrench (✎) next to the field to open the overlay.

Activating the Form

Once you've configured your sections, groups and fields on a form, in order to use the form, it must be activated. Before activating a form, you should check for any errors or warnings. If there are any of these, a link will display on the top-left side of the screen. Click on the link to review the

errors/warnings.

> **Important Note:** A form cannot be activated if there are errors. It can be activated with warnings but it is advisable to correct any information causing the warnings if possible.

To activate a form, click on the **Activate** button. You will be asked to confirm that you would like to activate the form. Remember that a form cannot be edited once it has been activated.

Adding the Form as a Favorite

To add the form as a favorite, click the **Add to Favorites** button. Administrators can share the form with end users by adding it to a **Shared** favorite folder.

Importing and Exporting Form Configurations

Forms can be created in one site and used in another site or environment. To do this, you export the form from the original environment and import it into the other environment. For example, you can create your forms in your Test environment and once they have been activated, they can be exported, then imported into Production. Forms are exported in an .xml format and imported in the same format. There are no limitations on the file name.

You must have the **Create/Edit Forms** permission (**Permission Settings > Shopping, Carts & Requisitions**) to perform this task.

Export a Form Configuration

1. Go to **Shop** 🖥 **> Shopping Settings > Manage Forms**. The forms library displays.

2. Locate the appropriate form and open it for editing by selecting **Edit** from the **Actions** menu or clicking on the form name and clicking on the **Edit** button.

3. Click the **Export** button near the top right of the screen. The form is exported as an .xml file. By default, all form configurations are named **FormConfiguration.xml**.

4. Open the exported form and name the form version something that you will recognize.

Import a Form Configuration

1. Go to **Shop** ⬛ **> Shopping Settings > Manage Forms**. The forms library displays.

2. Locate the appropriate form and open it for editing by selecting **Edit** from the **Actions** menu or clicking on the form name and clicking on the **Edit** button.

3. Select the **Import** sub-tab.

4. In the **File Name** field, click **Choose File**, then browse to and select the file that you are importing. This will be an .xml file, named FormConfiguration or whatever the exported file was named.

5. Click the **Import** button.

6. You will be notified once the file has completed import successfully. Once the form version is imported, it can viewed, updated, finalized, and more.

Guidelines for Updating Existing Forms

After a form is created, oftentimes you will need to make changes to accommodate new business requirements or make edits as you create the form the first time. You are able to make updates to existing forms but should consider the following guidelines when doing so:

- Version 1 is the original version of the form.

- When editing a form and saving the changes, a new version is created automatically by the system. Common changes required to forms are changes to the sections, groups, and fields on the form.

- To activate an older version, select the version from the **Choose Version** drop-down box, make the changes, then click the **Activate** option.

- Administrators who are editing forms in the forms builder can preview the forms by clicking the **Show Preview** button.

- If a form is already added to Favorites, this means that the form is currently available to users. You do not need to re-add the form to favorites unless you want to make changes to the naming or predefined information.

- To make changes to any predefined information, such as a single supplier selection, quantity, product description, etc., you must activate the version and re-add the form to Favorites.

- Changes to field labels for system-defined fields must be made through Field Management. Be careful when making these changes because they affect all forms as well as the field throughout the site. For example, if you change Catalog No to "Cat ID" the change will display on all forms and in other parts of the application.

- If changes are made on a form, when viewing history for previous orders that have used the form, the previous view of the form displays. In other words, a snapshot of the form is taken when the form is populated.

About Requests and Request Templates

Overview

Similar to forms created in the Forms Builder, requests can be used for purchasing goods and services. They can also be used for requests that are not directly related to procurement, such as check requests and other generic requests.

Requests have an interface that steps the user through filling out the information when submitting the requests.

Forms administrators create request templates. Templates are saved as user favorites and can then be completed by users who have access to the saved favorites.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Request Purposes

The request purpose indicates how the form request is to be used. There are six request purposes: **Procurement**, **Quick Quote**, **Check**, **Multi-Check**, **Credit Memo**, **Generic**.

On a request templates, the purpose is displayed in the sticker area in the top left corner of the page. The screens available or required on a request template vary based on the request purpose.

Here is a description of each request purpose:

- **Procurement Request** - Procurement requests directly involve the purchase of goods and services from suppliers. Procurement requests can be created for both **catalog** and **non-catalog** items:

  - *Procurement Request Templates with Hosted Catalog Items* - A template can include hosted catalog or virtual item master items. When these items are included on a template, shoppers are not able to add, delete or edit the items when filling out the form. For example, if you have the same catalog items that need to be purchased for every new hire you can create a form that includes all of these items. The form can be used repeatedly when you hire new employees.

    - On a procurement request for catalog items, two types of form fields can be added. A **Field** is used to gather additional information about the request. A **Field with Price** serves a similar purpose but allows a price to be associated with the item.

    - The items to be included in this type of request can be selected from a Favorites folder (if you have a folder set up with items before you configure the template), or you can select items from a catalog.

  - *Procurement Request Templates for Non-Catalog Items* - A procurement request template can be created for the purchase of non-catalog goods and services. This type of request allows you to include user-defined item fields. These fields can be defined by the forms administrator who creates the form but some of it can also be left up to the shopper. For example, if there is a specific caterer from which you order lunch for training sessions, the form administrator can configure the available items and price on a template and the shopper enters the quantity when filling out the request.

- **Quick Quote Request** - Quick quotes are often required by an organization when the purchase of goods or services are based on a specific business rule; for example, when a purchase is over a specific price threshold. The quick quote process involves creating a request for goods or services that is distributed to multiple suppliers for bid. Suppliers respond with a bid and that information can be entered back into the application.

- **Check Request** - Check requests are used to create accounting transactions that require a payment to be issued. They are typically used to issue refunds, payment from a clearing account or reductions of revenue. Check requests can bypass the **Add to Cart** feature. When a check request has been submitted, a non-PO invoice will be generated with the check request information attached.

- **Multi-Check Request** - Multi-check requests are a type of check request that allows users to create one check request with multiple items on the same form. For example, a user who is submitting expenses for a trip can add items for car rental, hotel rental and food expenses to one multi-check request.

- **Credit Memo Request** - Credit memo requests are used to create a credit memo and send it through approval workflow. To create a credit memo request, users need to provide the supplier name, supplier invoice number and credit amount. Administrators can require additional information as well. A default set of questions is included with the credit memo request.

- **Generic Request** - Generic requests are typically sent to users to request or obtain information for miscellaneous tasks or services. Generally, these will be internal requests. For example, your organization may have a process for requesting an office move. You can create a request template for this type of request that can be submitted through the approval workflow.

Request Template Screens

When configuring a request template, there several information screens that are configured on the request template that users then fill out information when submitting the requests. Here is an overview of the screens on the request templates. See Create a Request Template for detailed instructions on configuring each screen.

Most of the screens are available on all requests. If a screen is applicable to only specific requests, it is indicated.

- **Template Setup** - This screen contains the highest level information about the template, such as the title, purpose and form type.

- **Instructions** - This page provides information that would be helpful when filling out the form. For example, if you have included required questions, you may want to indicate this in the instructions. Instructions configured in the template will be inherited in forms created

from the template.

- **Quick Quote Request** - This screen allows the user to enter any important information regarding their quick quote request. This is the body of the email that will be generated and sent to suppliers that have been added to the form. This field can be configured by the forms administrator when the template is set up. When this is the case any forms created from the template will include this text. The shopper is not able to edit the text.

- **Attachments** - Attachments can be included on a request. An administrator can include attachments when creating the template and those attachments are inherited in forms created from the template. Shoppers can also add attachments when filling out the form. **Note:** Attachments on a Check Request form are copied to the associated invoice.

- **Suppliers** *(Non-Catalog Procurement and Quick Quote Requests)* - The Suppliers section allows you to select the suppliers for the request. You have the option to select from your registered suppliers or to manually include ad hoc suppliers. If you choose to add suppliers in the template, those suppliers will automatically be included on any forms created from that template. If suppliers are added to the template, shoppers can only choose from the suppliers you have included and they cannot choose another supplier. This allows a forms administrator to manage the suppliers from which shoppers can purchase with the form. If you do not include suppliers on the template, shoppers are able to choose a supplier.

- **Item Attribute Defaults** *(Non-Catalog Procurement Requests)* - When configuring fields with price, you can determine if the field will create a document line. Fields that are not document lines are rolled up and can be flagged with default item attributes. Forms administrators can enter data in these fields when creating the template. When that is the case, the information will automatically be inherited by forms created from the template. The shopper is not able to edit this information.

- **Form Fields and Questions** - In general, form questions and form fields are configured similarly to other questions in the application. Detailed information can be found in Configuring Questions for Supplier Registration, Sourcing and Request Templates in the online searchable help.

    - **Ability to Set Default Responses** - Forms administrators have the capability to set default responses for questions or form fields. A default response displays automatically to the end user who is filling out the form. This is useful when you would like to suggest a response or have a common response display by default. A default question or field response can be set as "read only", meaning the end user cannot change the response. If the read only option is not set, end users can override the default response when filling out the form.

- **Ability to Set a Form Field as a Product Attribute** - Forms administrators have the ability designate a form field response as a product attribute. When a field response is configured to be a product attribute, the response displays on the requisition as a product attribute. This gives the forms approver visibility of the field without having to go back to the form.

- **Ability to Provide Instructions within the Question or Field Groups** - Form fields and questions are often grouped by similarity. For example, fields related to shipping information may be grouped together within the **Form Fields** screen. Instructions can be included at the group level through general group setup. However, in some cases it may be necessary to provide instructions at certain points within the group. The **Add HTML** field allows you to include instructional text within a group of fields or questions. HTML fields are added in the same manner that other fields and questions are added but contain read only information that provides instructions for specific questions/fields within the group.

- **Ability to Copy Question Attachments to Invoices** - Forms administrators have the ability to create a question with a response type of **File Upload**, which allows users to add an attachment to a request. For Check Requests, Multi-Check Requests and Credit Memo Requests, File Upload style questions have an **Add to Invoice** checkbox. If the checkbox is selected, attachments uploaded to the question will be copied to the Internal Attachments section on the invoice generated from the submitted request. A notice on the request form indicates to users that "This attachment will be copied to the invoice". The checkbox is selected by default.

- **Product Line Items** *(Quick Quote Requests)* - The Product Line Items section allows you to manage the Quick Quote product items that will be sent to suppliers for evaluation. These items will be attached to the quick quote email that is sent to all suppliers that have been added to the Quick Quote Request. If you are not including product line items in the template, the section can be hidden from end user by clicking the **Hide Section** checkbox. **Note:** Product line items can be configured by the forms administrator when the template is set up. When this is the case, any forms created from the template will inherit this information. The shopper is not able to edit the line items.

- **Service Line Items** *(Quick Quote Requests)* - The Service Line Items section allows you to manage the Quick Quote service items that will be sent to suppliers for evaluation. These items will be attached to the quick quote email that is sent to all suppliers that have been added to the Quick Quote Request . If you are not including service line items in the template, the section can be hidden from end users by clicking the **Hide Section** checkbox.

> **Note:** Service line items can be configured by the forms administrator when the template is set up. When this is the case, any requests created from the template will inherit this information. The shopper is not able to edit the line items.

- **Catalog Items** *(Procurement Request for Catalog Items)* - The Catalog Items screen contains the items associated with the request. These items are added by the forms administrator when the template is created. Shoppers cannot add, delete or edit catalog items.

- **Show Kit Quantity Setting** - The Kit feature is functionality that allows shoppers to order multiple quantities of the catalog items included on the form. When this setting is enabled, a Quantity field displays to the shopper. The shopper can then order multiples of all the items without having to submit the form multiple times.

- **Review and Finalize** - The **Review and Finalize** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

Create a Request Template

Overview

Similar to the forms created in the Forms Builder, requests can be used for purchasing goods and services. They can also be used for requests that are not directly related to procurement such as check requests and other generic requests.

To configure requests, forms administrators first create request templates. The templates are saved as user favorites and can then be completed by users who have access to the saved favorites. The requests (also referred to as form requests) are filled out in a wizard-like interface that steps users through entering data for the request.

This article provides instructions for configuring different types of request templates.

> **Note:** These instructions are for request templates related to eProcurement (i.e., procurement, quick quote, credit memo, check request, multi-check requests and generic). For information about creating request templates for contracts, sourcing events or suppliers, please see the appropriate handbook.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Creating and Updating Request Templates

Request templates are set up by administrators and then shared via Favorites for use.

Create a Procurement Request Template with Catalog Items

Procurement requests directly involve the purchase of goods and services from suppliers. Procurement requests can be created for both catalog and non-catalog items.

Configure the request by moving through the steps in the wizard. As you complete each step, click the **Save Progress** button to save the information and remain on the page. Click the **Next** button to save the information and move to the next step. A green check ✔ will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the ✔ by default.

Not all steps are required to build the template. For example, you are not required to include attachments.

1. Navigate to **Shop** 🖼 **> Shopping Settings > Manage Request Templates**.

2. Choose one:

   - *Create a Request Template* - Click **Build a New Template**. Enter a **Template Title** and select a request **Purpose**, then click **Submit**.

   - *Update a Request Template* - Locate the request template you want to update. Either click the **Actions** button and select **Edit Draft**, or open the template, click **Choose Other Version** and select **Draft**.

3. Complete these screens:

   ### Template Setup

   The **Template Setup** screen contains the highest level information about the template. It is displayed as the **Details** section on requests created from the template. You can choose to hide this section, in which case it will not be an option on requests.

Complete these fields:

- **Template Title** (required) - The template name. Template title is configured when the template is created but can be edited on this page.

- **Purpose** - This is a read-only field that indicates the purpose of the request. The purpose is selected when a request template is created.

- **Version Description** - If you are creating a new version of a request, enter a description of the template version if desired.

- **Form Type** (required) - Indicates the form type. Select the appropriate form type from the drop-down field. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization. At least one form type must be available to create a template. Please contact your system administrator for additional information about your organization's form types.

- **Searchable Keywords** - Enter keywords in the text field. Keywords entered in this field are searchable in document search. Document search will locate requests created from the request template. Keywords in a procurement request are also searchable in product search.

- **Currency** (Procurement requests only) - Select a currency for the request. **Note:** If you select a currency on the template, end users cannot change it when filling out the request.

- **Hidden Section** - Hiding a section removes an unnecessary request area from the finalized templates, allowing end users to focus on the information that is really needed. Click the Hidden Section checkbox to hide the section.

Instructions

The **Instructions** page provides information that would be helpful when filling out the request. For example, if you have included required questions, you may want to indicate this in the instructions. Instructions configured in the template will be inherited in requests created from the template.

To include instructions, simply type the text in to the field. Several formatting options are available. The form creator is not required to enter instructions. This field may be left blank. If the field is left blank, the Instructions option will not be displayed on requests created from the template.

Attachments

Attachments can be added to a request template and those attachments are inherited by requests created from the template. Shoppers can also add attachments when filling out the request. You can choose to hide the Attachments section, in which case it will not be an option on requests.

Note: Attachments on a Check Request form are copied to the associated invoice.

Add attachments to the request template

    a. Click **Add Attachment**. The Add Attachment overlay opens.

    b. Click the **Upload** button. The Upload overlay opens.

    c. Enter a **title** for the attachment (required).

    d. Click **Choose File**, then browse to and select the file to upload.

    e. Click **Save Changes**.

    f. Repeat the steps above for additional attachments.

Hide the Attachments section

    a. Click the **Hidden Section** checkbox to hide the Attachments section from end users who are completing requests created from the template.

Form Fields

The fields that are included in a procurement request are configured in the Form Fields section on the template. Form fields can be required or optional. You can also create conditional fields, which are fields that only display based on the information entered in another field.

Form fields are organized by page and group. Once you've added a page or group to the Form Fields section, there are three options for adding fields to them:

- **Add Field** (for catalog and non-catalog items) - These fields are used to gather information about the order. You can configure different types of fields, depending on the information you want the user to provide, for example, text, multiple choice, Yes/No etc.

- **Add HTML Area** - The Add HTML field allows you to include instructional text within a group of fields or questions.

Add a Page or Group

a. Open a draft copy of the request template you wish to change.

b. Click **Form Fields** in the left menu.

c. In the right panel, near the top of the page, click the [Add ▾] button and select **Add a new page if you want to** or select **Add Group**.

d. Complete these fields in the **Add Page** or **Add Group** window:

- **Page Title** / **Group Name** - Enter the title that will appear at the top of the page or the name that will appear in the group header.

- **Add Instructions** - If you select **Yes**, a text configuration area will display. Add and format the text that will appear at the top of the page or group.

- **Visibility** - This optional field allows you to control the visibility of the page or group based on information entered in another field.

- **Display Order** - If there is more than one page or group, select where it will display.

e. Click **Save Changes**.

Add Form Field

Fields are used to gather information about an order. The **Add Field** option can be used to add an item that is not associated with a price. For example, if the request template was for a newly hired employee, you might include a date field for the start date, a text field for the new hire name and a multiple choice field to select the new hire's location.

a. Open a draft copy of the request template you wish to change.

b. Click **Form Fields** in the left menu and locate the group in which you would like to add the field in the right panel.

c. Within the group, click [Add ▾] and select **Add Field**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The **Add Field** window opens.

d. Complete these options in the **Add Field** window to define how the field will function on requests created from the template:

- **Name** (required) - Enter the field text . This is the text that will display to the requester so be sure to be clear and concise about the information you are gathering.

- **Integration ID** - If your organization allows form elements to be added to document exports, an integration ID number entered in this field will cause the form request field to show in the document export.

- **Add Help Text** - You have the option to include help text specific to the question. If you select **Yes**, a text configuration area will display. Add and format the text.

- **Field Type** (required) - This field determines how you would like the requester to respond to the question. The options include:

  - **Text (Single Line)** - Allows the requester to respond with a single text line.

  - **Text (Multi-Line)** - Allows the requester to respond with multiple lines of text.

  - **Numeric Text Box** - Requires the user to enter a number in the response text box.

  - **Yes/No** - Gives the requester the Yes or No option for response.

  - **Dropdown List (Pick One)** - Allows the requester to choose one response from a list of responses presented in a drop-down list. When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

  - **Multiple Choice (Pick One)** - Allows the requester to choose one response from a list of responses presented as a multiple choice list .When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **Multiple Select (Pick Many)** - Allows the requester to choose multiple responses from a list of responses presented as a multiple choice list . When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **File Upload** - Allows you to attach a file that the requester can view when submitting the response. When you choose this option, the **Attach File** option will display near the bottom of the window, where you can click Upload to attach a file.

- **Date** - Allows the requester to enter a date as a response to the question.

- **Agree/Disagree** - Presents to requester with the option to agree or disagree as a response.

- **Confirm (Single Checkbox)** - Presents the requester with a text statement and a checkbox that allows them to confirm the text. When you select this option the Checkbox text field will display. You are required to enter text in the text box.

- **Visibility** - This optional field allows you to control the visibility of the field based on information entered in another field. Click Add Conditional Visibility . Locate the appropriate field and click on it, then click the **Next** button. The configured responses for that question will display. Click on the response(s) that should trigger the visibility of the question. When you have completed this click **Save Changes**.

- **Display Order** (required) - Select where the field will fall in display order within the group (options will vary based on the number of questions in the group). **Note:** This is only displayed if there is more than one field.

- **Checkbox Text** - This field is only displayed if you have selected a **Confirm (Single Checkbox)** field type. This is where to enter the text that will be displayed next the checkbox that the user confirms when they select the checkbox.

- **Response Is Required** (checkbox) - Click this checkbox to require the requester to enter information in the field.

- **Product Attribute** (checkbox) - When a field response is configured to be a product attribute, the response displays on the requisition as a product attribute. This gives the request approver visibility of the field without having to go back to the request. **Note:** This option is *not* displayed for the File Upload field type.

- **Field Name is Searchable** (checkbox) - Click this checkbox to make the field searchable in document search for requests created from the template. This will also make the template searchable in product search once it is finalized.

- **Send to Supplier** - Click this checkbox to allow this field to be included on PO distribution documents.

- **Field Values** - This field is displayed if you have selected a **Dropdown List** or **Multiple Choice**, or **Multiple Select** field type. This is where to enter the options that are available for the user to select in the dropdown or multiple choice field. Enter a value in the **Option** field, then select **+ Add Option**. Continue this process until you have added all responses. They are listed in reverse order, so add the bottom of the list first. Click the Remove button to delete an option.

- **Attach File** - This field is displayed if you have selected the **File Upload** field type. Click **Upload** to attach a file to the field.

e. Click **Save Changes**.

f. Once a field is created, it is displayed in the page or group selected and these options are available from the drop-down menu next to the field:

- **Edit** - Select to make changes to the field settings.

- **Set Default Value** - Select to display a default response automatically to the end user who is filling out the form. This is useful when you would like to suggest a response or have a common response display by default. A default response can be set as "read only", meaning the end user cannot change the response. If the read only option is not set, end users cannot override the default response when filling out the form.

- **Delete** - Select to remove the field.

Add HTML Area

The **Add HTML Area** option allows you to include instructional text within a group of fields or questions. HTML fields are added in the same manner that other fields and questions are added but contain read only information that provides instructions for specific questions/fields within the group.

   a. Open a draft copy of the request template you wish to change

   b. Click **Form Fields** in the left menu and locate the group in which you would like to add the HTML area.

   c. Complete these fields in the **Add HTML Area** window:

   - **Name** - Enter the name of the area.

   - **HTML Area** - Enter the read-only text that provides instructions for the questions or fields within the group.

   - **Visibility** - This optional field allows you to control the visibility of the field based on information entered in another field.

   - **Display Order** - Select where the HTML area will display within the group.

Catalog Items

The **Catalog Items** screen contains the items associated with the request. These items are added by the forms administrator when the template is created. Shoppers cannot add, delete or edit catalog items.

To include catalog items on a request you can select from a Favorites folder that contains the items or you can select from a catalog. If you are selecting an item from Favorites, you can choose multiple folders. All items from each folder will be included in the request, but you can delete items from the request. It is a best practice to create Favorites folders specifically for use in the procurement catalog request.

Show Kit Quantity Setting

The Kit feature is functionality that allows shoppers to order multiple quantities of the catalog items included on the request. When this setting is enabled, a Quantity field displays to the shopper. The shopper can then order multiples of all the items without having to submit the form multiple times.

Add Catalog Items to Request

To select items:

a. Open a draft copy of the request template you wish to change.

b. Click **Catalog Items** in the left menu.

c. If you want shoppers to be able to order multiple quantities of the catalog items included on the request, select the **Show Kit Quantity Field** checkbox. Otherwise, leave the checkbox blank.

d. Click **Select From...** and choose one of the following options:

- Choose **Select From Catalog** to shop for items in the catalog.

    - In the pop-up window, enter search terms and click **Go**. Items from the catalog that match your search terms are displayed.

    - Click the **Add to Request** button next to each item you want to add, then click **Back to Request** or close the window. The items you selected are displayed.

- Choose **Select Favorite Folder** to choose an items from a Favorites folder.

    - In the pop-up window, click on the favorites folder that contains the items for the template. The items in the folder display. **Note:** Favorites folders that don't have hosted catalog or virtual item master items do not display.

    - Click **Select**. This action will select all items in the folder. You cannot select individual items from the folder.

e. You can make these changes to the items in the **Catalog Items** page:

- Change the quantity of the items by entering a value in the **Qty** field.

- Delete items by clicking the **Delete** button next to individual items or select the checkbox next to the items you want to delete and then select **Line Item Actions > Delete Selected Items**.

f. Click **Save Progress** to save your changes.

Review and Finalize

The **Review and Finalize** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

Once all fields are completed, click the **Finalize and Activate Template** button.

> **Important Note:** Once a template is finalized, it cannot be edited or deleted. It can only be viewed, copied or archived.

Create a Procurement Request Template with Non-Catalog Items

Procurement requests directly involve the purchase of goods and services from suppliers. Procurement requests can be created for both catalog and non-catalog items.

Configure the request by moving through the steps in the wizard. As you complete each step, click the **Save Progress** button to save the information and remain on the page. Click the **Next** button to save the information and move to the next step. A green check ✔ will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the ✔ by default.

Not all steps are required to build the template. For example, you are not required to include attachments.

1. Navigate to **Shop** ⬚ **> Shopping Settings > Manage Request Templates**.

2. Choose one:

   - *Create a Request Template* - Click **Build a New Template**. Enter a **Template Title** and select a request **Purpose**, then click **Submit**.

   - *Update a Request Template* - Locate the request template you want to update. Either click the **Actions** button and select **Edit Draft**, or open the template, click **Choose Other Version** and select **Draft**.

3. Complete these screens

Template Setup

The **Template Setup** screen contains the highest level information about the template. It is displayed as the **Details** section on requests created from the template. You can choose to hide this section, in which case it will not be an option on requests.

Complete these fields:

- **Template Title** (required) - The template name. Template title is configured when the template is created but can be edited on this page.

- **Purpose** - This is a read-only field that indicates the purpose of the request. The purpose is selected when a request template is created.

- **Version Description** - If you are creating a new version of a request, enter a description of the template version if desired.

- **Form Type** (required) - Indicates the form type. Select the appropriate form type from the drop-down field. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization. At least one form type must be available to create a template. Please contact your system administrator for additional information about your organization's form types.

- **Searchable Keywords** - Enter keywords in the text field. Keywords entered in this field are searchable in document search. Document search will locate requests created from the request template. Keywords in a procurement request are also searchable in product search.

- **Currency** (Procurement requests only) - Select a currency for the request. **Note:** If you select a currency on the template, end users cannot change it when filling out the request.

- **Hidden Section** - Hiding a section removes an unnecessary request area from the finalized templates, allowing end users to focus on the information that is really needed. Click the Hidden Section checkbox to hide the section.

Instructions

The **Instructions** page provides information that would be helpful when filling out the request. For example, if you have included required questions, you may want to indicate this in the instructions. Instructions configured in the template will be inherited in requests created from the template.

To include instructions, simply type the text in to the field. Several formatting options are available. The form creator is not required to enter instructions. This field may be left blank. If the field is left blank, the Instructions option will not be displayed on requests created from the template.

Suppliers

The **Suppliers** section is available on Procurement (non-catalog item) and Quick Quote request templates. If you choose to add suppliers to a template, those suppliers will automatically be included on any requests created from that template. You can select from your registered suppliers or manually include ad-hoc suppliers.

- *For Procurement (non-catalog item) requests*, if suppliers are selected on a template, shoppers can only choose from the suppliers you have included. They cannot choose another supplier. This allows a forms administrator to manage the suppliers from which shoppers can purchase with the request. If you do not include suppliers on the template, shoppers are able to choose a supplier on the request.

- *For Quick Quote requests*, if suppliers are selected on a template, shoppers do have the option to keep or remove suppliers from the list provided by the administrator, and they can also search for and add suppliers to the request.

> **Note:** *For Check requests*, the Supplier option is not displayed on the request template, it appears by default on requests created by users. When a user selects a supplier on a check request, **Additional Information** and **Codes** sections are also displayed.

Follow these steps to add suppliers to a request template:

a. Click **Suppliers** in the left menu. If suppliers have been added to the template, they are displayed on the **Template Suppliers** tab. If there are no suppliers, you will be taken directly to the **Add Suppliers to Template** tab.

b. Click the **Add Suppliers to Template** tab if you are not on it.

c. Add a supplier using one of the following methods:

- **Search Registered Suppliers** - Enter search criteria in the fields. To search by commodity code, click the ✏ button to the right of the Commodity Code field and select one or more of the available codes. When you have entered all

the search criteria, click **Q Search** . The search results display. Click the **Add** button for each supplier in the search results that you would like to include on the request template.

- **Manually Add a Supplier** - Click the **Manually Add Suppliers** button. Enter supplier information in the overlay and select a distribution method (required). Click **Save**, or **Save and Add Another** to save the supplier and immediately add another supplier.

d. Selected and manually added suppliers are displayed on the **Template Suppliers** tab. These actions are available:

- Click the **supplier name** to view general information from the supplier profile.

- Click **Remove** to remove a supplier from selection.

- Click **Make default** next to the supplier you want to be selected by default on requests created from the template. This will save users submitting the request a step –they will only need to click on the Supplier page if a different supplier is needed for the request. Click the button next to a different supplier to change the default supplier, or click **Undo default** to remove the designation entirely.

Attachments

Attachments can be added to a request template and those attachments are inherited by requests created from the template. Shoppers can also add attachments when filling out the request. You can choose to hide the Attachments section, in which case it will not be an option on requests.

Note: Attachments on a Check Request form are copied to the associated invoice.

Add attachments to the request template

a. Click **Add Attachment**. The Add Attachment overlay opens.

b. Click the **Upload** button. The Upload overlay opens.

c. Enter a **title** for the attachment (required).

d. Click **Choose File**, then browse to and select the file to upload.

e. Click **Save Changes**.

f. Repeat the steps above for additional attachments.

Hide the Attachments section

a. Click the **Hidden Section** checkbox to hide the Attachments section from end users who are completing requests created from the template.

Item Attribute Defaults

When configuring fields with price, you can determine if the field will create a document line. Fields that are not document lines are rolled up and can be flagged with default item attributes. Forms administrators can enter data in these fields when creating the template. When that is the case, the information will automatically be inherited by forms created from the template. The shopper is not able to edit this information.

a. Click **Item Attributes** in the left menu.

b. Select the default items. Options include:

- **Capital Expense** - Select **Yes** to flag rolled up items as capital expense.

- **Taxable** - Select **Yes** to flag rolled up items as taxable.

- **UNSPSC** - Enter a UNSPSC code. The rolled up items will be flagged with the code.

- **Catalog No.** - Enter a catalog number. The rolled up items will be flagged with the number.

- **Commodity Code** - Enter a commodity code. The rolled up items will be flagged with the code.

- **Health and Safety** - Choose all of the appropriate health and safety flags to flag the rolled up items.

Form Fields

The fields to be included in a procurement request are configured in the Form Fields section on the template. Form fields can be required or optional. You also have the ability to create conditional fields, or fields that only display based on the information entered in

another field.

Form fields are organized by page and group. Once you've added a page or group to the Form Fields section, there are three options for adding fields to them:

- **Add Field** (for catalog items) - These fields are used to gather information about the order. You can configure different types of fields, depending on the information you want the user to provide, for example, text, multiple choice, Yes/No etc.

- **Add Field with Price** (for non-catalog items) - This option is available for forms with configurable items. These fields are the actual items to be purchased. You can create fields with multiple options or a completely user-defined field.

- **Add HTML Area** - The Add HTML field allows you to include instructional text within a group of fields or questions.

Add a Page or Group

a. Open a draft copy of the request template you wish to change.

b. Click **Form Fields** in the left menu

c. In the right panel, near the top of the page, click the [Add ▼] button and select **Add a new page if you want to** or select **Add Group**.

d. Complete these fields in the **Add Page** or **Add Group** window:

- **Page Title** / **Group Name** - Enter the title that will appear at the top of the page or the name that will appear in the group header.

- **Add Instructions** - If you select **Yes**, a text configuration area will display. Add and format the text that will appear at the top of the page or group.

- **Visibility** - This optional field allows you to control the visibility of the page or group based on information entered in another field.

- **Display Order** - If there is more than one page or group, select where it will display.

e. Click **Save Changes**.

Add Form Field

Fields are used to gather information about an order. The **Add Field** option can be used to add an item that is not associated with a price. For example, if the request template was for a newly hired employee, you might include a date field for the start date, a text field for the new hire name and a multiple choice field to select the new hire's location.

a. Open a draft copy of the request template you wish to change.

b. Click **Form Fields** in the left menu and locate the group in which you would like to add the field in the right panel.

c. Within the group, click and select **Add Field**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The **Add Field** window opens.

d. Complete these options in the **Add Field** window to define how the field will function on requests created from the template:

- **Name** (required) - Enter the field text . This is the text that will display to the requester so be sure to be clear and concise about the information you are gathering.

- **Integration ID** - If your organization allows form elements to be added to document exports, an integration ID number entered in this field will cause the form request field to show in the document export.

- **Add Help Text** - You have the option to include help text specific to the question. If you select **Yes**, a text configuration area will display. Add and format the text.

- **Field Type** (required) - This field determines how you would like the requester to respond to the question. The options include:

  - **Text (Single Line)** - Allows the requester to respond with a single text line.

  - **Text (Multi-Line)** - Allows the requester to respond with multiple lines of text.

- **Numeric Text Box** - Requires the user to enter a number in the response text box.

- **Yes/No** - Gives the requester the Yes or No option for response.

- **Dropdown List (Pick One)** - Allows the requester to choose one response from a list of responses presented in a drop-down list. When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **Multiple Choice (Pick One)** - Allows the requester to choose one response from a list of responses presented as a multiple choice list .When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **Multiple Select (Pick Many)** - Allows the requester to choose multiple responses from a list of responses presented as a multiple choice list . When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **File Upload** - Allows you to attach a file that the requester can view when submitting the response. When you choose this option, the **Attach File** option will display near the bottom of the window, where you can click Upload to attach a file.

- **Date** - Allows the requester to enter a date as a response to the question.

- **Agree/Disagree** - Presents to requester with the option to agree or disagree as a response.

- **Confirm (Single Checkbox)** - Presents the requester with a text statement and a checkbox that allows them to confirm the text. When you select this option the Checkbox text field will display. You are required to enter text in the text box.

- **Visibility** - This optional field allows you to control the visibility of the field based on information entered in another field. Click Add Conditional Visibility . Locate the appropriate field and click on it, then click the **Next** button. The

configured responses for that question will display. Click on the response(s) that should trigger the visibility of the question. When you have completed this click **Save Changes**.

- **Display Order** (required) - Select where the field will fall in display order within the group (options will vary based on the number of questions in the group). **Note:** This is only displayed if there is more than one field.

- **Checkbox Text** - This field is only displayed if you have selected a **Confirm (Single Checkbox)** field type. This is where to enter the text that will be displayed next the checkbox that the user confirms when they select the checkbox.

- **Response Is Required** (checkbox) - Click this checkbox to require the requester to enter information in the field.

- **Product Attribute** (checkbox) - When a field response is configured to be a product attribute, the response displays on the requisition as a product attribute. This gives the request approver visibility of the field without having to go back to the request. **Note:** This option is *not* displayed for the File Upload field type.

- **Field Name is Searchable** (checkbox) - Click this checkbox to make the field searchable in document search for requests created from the template. This will also make the template searchable in product search once it is finalized.

- **Send to Supplier** - Click this checkbox to allow this field to be included on PO distribution documents.

- **Field Values** - This field is displayed if you have selected a **Dropdown List** or **Multiple Choice**, or **Multiple Select** field type. This is where to enter the options that are available for the user to select in the dropdown or multiple choice field. Enter a value in the **Option** field, then select **+ Add Option**. Continue this process until you have added all responses. They are listed in reverse order, so add the bottom of the list first. Click the Remove button to delete an option.

- **Attach File** - This field is displayed if you have selected the **File Upload** field type. Click **Upload** to attach a file to the field.

e. Click **Save Changes**.

f. Once a field is created, it is displayed in the page or group selected and these options are available from the drop-down menu next to the field:

- **Edit** - Select to make changes to the field settings.

- **Set Default Value** - Select to display a default response automatically to the end user who is filling out the form. This is useful when you would like to suggest a response or have a common response display by default. A default response can be set as "read only", meaning the end user cannot change the response. If the read only option is not set, end users cannot override the default response when filling out the form.

- **Delete** - Select to remove the field.

Add Field with Price (non-catalog items)

> **Note:** This option is *not* available if the request template is a procurement request for catalog items.

This option is available for forms with configurable items. These fields are the actual items to be purchased. You can create fields with multiple options or a completely user-defined field. You can assign conditional visibility to the field - meaning the field displays based on information entered in another field.

For example, if the request template was for lunch orders, you might include a date field for the event date and a text field for the address. You can assign conditional visibility to the field - meaning the field displays based on information entered in another field.

a. Open a draft copy of the request template you wish to change

b. Click **Form Fields** in the left menu and locate the group in which you would like to add the field.

c. Within the group, click and select **Add Field with Price**. The **Add Field** window opens.

d. Configure the field:

- **Name** (required) - Enter the field text . This is the text that will display to the requester so be sure to be clear and concise about the information you are gathering.

- **Add Help Text** - You have the option to include help text specific to the question. If you select **Yes**, a text configuration area will display. Add and format the text.

- **Field Type** (required) - This field determines how you would like the requester to respond to the question. The options include:

    - **Multiple Choice (Pick One)** - Allows the requester to choose one item from a list of items. When you choose this option, the **Field Values** option will display near at the bottom of the window, where you can configure the responses for the field.

    - **Dropdown List (Pick One)** - Allows the requester to choose one item from a list of items presented in a drop-down list. When you choose this option, the **Field Values** option will display near at the bottom of the window, where you can configure the responses for the field.

    - **Multiple Select (Pick Many)** - Allows the requester to choose multiple items from a list of items. When you choose this option, **Field Values** option will display near at the bottom of the window, where you can configure the responses for the field.

    - **User Defined**- Allows you to include fields that the requester can configure on the request. When you select this option the **Attributes** section is displayed in the bottom section of the window and additional options are available to define the field.

- **Visibility** - This optional field allows you to control the visibility of the field based on information entered in another field. Click **Add Conditional Visibility** and select a field, then choose one of these options:

    - **Form request total** - Choose this option to display an additional field based on the total amount of the request. Select the **Next** button. Choose whether the field should be displayed based on whether a request's total amount is **Greater than or equal to** or **Less than or equal to** the entered value, then enter the amount to be evaluated and save changes. **Important!** Think carefully about the template design. It is important to place the fields with price **before** the conditional question so that the total can be calculated correctly and the conditional question triggered correctly.

- **Select a question** - Choose this option to display an additional field based on the selection in a different field. Locate the appropriate field and click on it, then click the **Next** button. The configured responses for that question will display. Click on the response(s) that should trigger the visibility of the question. When you have completed this click **Save Changes**.

- **Display Order** (Required when more than one field has been created for a group) - Select where the field will fall in display order within the group (options will vary based on the number of questions in the group).

- **Field Values** - This field is displayed if you have selected a **Dropdown List**, **Multiple Choice**, or **Multiple Select** field type. This is where to enter the items that are available for the user to select in the field. Enter the name of the item in the **Name** field and its value in the **Unit Price** field, then select **+ Add Value**. Continue this process until you have added all items. They are listed in reverse order, so add the items at bottom of the list first. Click the Remove button to delete an item.

- **Create Document Line** - Click **Yes** to create a separate document line for the field. When this setting is set to **Yes**, the *Taxable* and *Catalog No.* options are displayed in the **Attributes** section below.

e. The **Attributes** section is displayed depending on the field type selected (i.e., User-Defined), and if the "Create Document Line" option is set to Yes.

- Click the checkbox next to an attribute to expand and view configuration options. **Unit Price** and **Quantity** attributes are expanded by default.

- For each attribute, a **Display Name** field is displayed when it is selected. The field is optional. If a Display Name is entered in the field, that text will be displayed on the request. If no Display Name is provided, the request will show the default attribute name.

- For each attribute, a **Response Is Required** checkbox is displayed when it is selected. Click the checkbox to make the attribute required on requests.

- For the **Product Description** attribute only, a **Display First** checkbox allows customers to display the product description before the price and quantity of an item. By default, the **Display First** checkbox is not selected, and the product description is displayed after the unit price and quantity.

> **Important Note:** These fields can be populated in the template or they can be left blank to be populated by the request submitter. If it's populated in the template, request submitters are not able to change it when filling out the request.

- *These fields are displayed for all field types if the Create Document Line option is selected:*

    - **Taxable** - Click this checkbox to identify if the line item is taxable. Click Yes or No.

    - **Catalog No.** - Click this field to include a catalog number with the line item. Enter catalog number in the text box.

- *These fields are displayed if the User-Defined field type is selected:*

    - **Unit Price** - The price assigned to the field. This field is enabled by default and can only be populated by the form submitter.

    - **Quantity**- The quantity assigned to the field. This field is enabled by default and can only be populated by the form submitter.

    - **Unit of Measure** - Click this checkbox to include unit of measure with the price field. Select the appropriate value from the drop-down menu.

    - **Product Size** - Click this checkbox to include product size with the price field. Select the appropriate value from the drop-down menu.

    - **Product Description** - Click this checkbox to include a product description with the price field. Enter the product description in the text box.

    - **Manufacturer Name** - Click this checkbox to include a manufacturer name with the price field. Enter the manufacturer name in the text box. Select the **Display First** checkbox to display the product description before the price and quantity of an item. By default, the **Display First** checkbox is not selected, and the product description is displayed after the unit price and quantity.

- **Manufacturer Part No.** - Click this checkbox to include a manufacturer part number with the price field. Enter the manufacturer part number in the text box.

- **Service Start Date** - Click this checkbox to include a start date for service if the price is for a service item. Select the date from the date picker.

- **Service End Date** - Click this checkbox to include a end date for service if the price is for a service item. Select the date from the date picker.

- *These fields are displayed if the User-Defined field type is selected and the Create Document Line option is set to Yes:*

  - **Capital Expense** - Click this checkbox to identify the line item as a capital expense. Click Yes or No.

  - **UNSPSC** - Click this field to include a UNSPSC code with the line item. Enter a UNSPSC code in the text box.

  - **Commodity Code** - Click this field to include a commodity code with the line item. Enter commodity code text in the text box.

  - **Line Item Type** - Select the checkbox next to **Line Item Type**, then choose one of these in the drop-down field:

    - *Leave the field blank* (recommended) - Leave the field blank to have the field function as it usually does on forms.

    - *Select an option from the drop-down menu* - Choose **Products** or **Services** to pre-populate the Line Item Type field with a specific value on forms created from the template. **Note:** This will not make the Line Item Type field "read-only", unlike the other checkbox fields in the overlay.

f. Click **Save Changes**.

Add HTML Area

The **Add HTML Area** option allows you to include instructional text within a group of fields or questions. HTML fields are added in the same manner that other fields and questions are added but contain read only information that provides instructions for specific questions/fields within the group.

a. Open a draft copy of the request template you wish to change

b. Click **Form Fields** in the left menu and locate the group in which you would like to add the HTML area.

c. Complete these fields in the **Add HTML Area** window:

- **Name** - Enter the name of the area.

- **HTML Area** - Enter the read-only text that provides instructions for the questions or fields within the group.

- **Visibility** - This optional field allows you to control the visibility of the field based on information entered in another field.

- **Display Order** - Select where the HTML area will display within the group.

Review and Finalize

The **Review and Finalize** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

Once all fields are completed, click the **Finalize and Activate Template** button.

> **Important Note:** Once a template is finalized, it cannot be edited or deleted. It can only be viewed, copied or archived.

Create a Quick Quote Request Template

Quick quotes are often required by an organization when the purchase of goods or services are based on a specific business rule; for example, when a purchase is over a specific price threshold. The quick quote process involves creating a request for goods or services that is distributed to multiple suppliers for bid. Suppliers respond with a bid and that information can be entered back into the application.

Configure the request by moving through the steps in the wizard. As you complete each step, click the **Save Progress** button to save the information and remain on the page. Click the **Next**

button to save the information and move to the next step. A green check ✔ will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the ✔ by default.

Not all steps are required to build the template. For example, you are not required to include attachments.

1. Navigate to **Shop** ▣ **> Shopping Settings > Manage Request Templates**.

2. Choose one:

   - *Create a Request Template* - Click **Build a New Template**. Enter a **Template Title** and select a request **Purpose**, then click **Submit**.

   - *Update a Request Template* - Locate the request template you want to update. Either click the **Actions** button and select **Edit Draft**, or open the template, click **Choose Other Version** and select **Draft**.

3. Complete these screens

Template Setup

The **Template Setup** screen contains the highest level information about the template. It is displayed as the **Details** section on requests created from the template. You can choose to hide this section, in which case it will not be an option on requests.

Complete these fields:

- **Template Title** (required) - The template name. Template title is configured when the template is created but can be edited on this page.

- **Purpose** - This is a read-only field that indicates the purpose of the request. The purpose is selected when a request template is created.

- **Version Description** - If you are creating a new version of a request, enter a description of the template version if desired.

- **Form Type** (required) - Indicates the form type. Select the appropriate form type from the drop-down field. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization. At least one form type must be available to create a template. Please contact your system administrator for additional information about your organization's form types.

- **Searchable Keywords** - Enter keywords in the text field. Keywords entered in this field are searchable in document search. Document search will locate requests created from the request template. Keywords in a procurement request are also searchable in product search.

- **Currency** (Procurement requests only) - Select a currency for the request. **Note:** If you select a currency on the template, end users cannot change it when filling out the request.

- **Hidden Section** - Hiding a section removes an unnecessary request area from the finalized templates, allowing end users to focus on the information that is really needed. Click the Hidden Section checkbox to hide the section.

Instructions

The **Instructions** page provides information that would be helpful when filling out the request. For example, if you have included required questions, you may want to indicate this in the instructions. Instructions configured in the template will be inherited in requests created from the template.

To include instructions, simply type the text in to the field. Several formatting options are available. The form creator is not required to enter instructions. This field may be left blank. If the field is left blank, the Instructions option will not be displayed on requests created from the template.

Quick Quote Request

The **Quick Quote Request** screen allows the user to enter any important information regarding their quick quote request. This is the body of the email that will be generated and sent to suppliers that have been added to the request.

This field can be configured by the forms administrator when the template is set up. When this is the case any forms created from the template will include this text. The shopper is not able to edit the text.

To include information simply enter it in to the text box. Several formatting options are available.

Attachments

Attachments can be added to a request template and those attachments are inherited by requests created from the template. Shoppers can also add attachments when filling out the request. You can choose to hide the Attachments section, in which case it will not be an option on requests.

Note: Attachments on a Check Request form are copied to the associated invoice.

Add attachments to the request template

    a. Click **Add Attachment**. The Add Attachment overlay opens.

    b. Click the **Upload** button. The Upload overlay opens.

    c. Enter a **title** for the attachment (required).

    d. Click **Choose File**, then browse to and select the file to upload.

    e. Click **Save Changes**.

    f. Repeat the steps above for additional attachments.

Hide the Attachments section

    a. Click the **Hidden Section** checkbox to hide the Attachments section from end users who are completing requests created from the template.

Questions

In general, **configuring request questions** is similar to other questions in the application, they are organized by page and group. Once you've added at a page or group to the Questions section, there are four options for adding questions:

- **Add Question** - The **Add Question** option can be used to add questions to a request that users complete when they submit the request.

- **Add Invoice Date** - The **Invoice Date** field can be added once to a request template.

- **Add Need By Date** - The **Need By Date** field can be added once to a request template.

- **Add HTML Area** - The Add HTML field allows you to include instructional text within a group of fields or questions.

In addition, there are some capabilities unique to questions in requests: you can set default responses and provide instructions within a question group using the Add HTML Area option.

Add a Question Page or Group

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, near the top of the page, click the button and select **Add Question Page** or **Add Question Group**.

d. Complete these fields in the **Add Question Page** or **Add Question Group** window:

   • **Page Title** / **Group Name** - Enter the title that will appear at the top of the page or the name that will appear in the group header.

   • **Add Instructions** - If you select **Yes**, a text configuration area will display. Add and format the text that will appear at the top of the page or group.

   • **Visibility** - This optional field allows you to control the visibility of the page or group based on information entered in another field.

   • **Display Order** - If there is more than one page or group, select where it will display.

e. Click **Save Changes**.

Add Question

Questions are used to gather information about an order. The **Add Question** option can be used to add questions to a request that users complete when they submit the request.

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, locate the page and group in which you would like to add the question.

d. Within the group, click **Add ▾** and select **Add Question**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The **Add Question** window opens.

e. Complete these options in the **Add Field** window to define how the field will function on requests created from the template:

- **Question Text** (required) - Enter the question. This is the question that will display to the requester so be sure to be clear and concise about the information you are gathering.

- **Add Help Text** - You have the option to include help text specific to the question. If you select **Yes**, a text configuration area will display. Add and format the text.

- **Response Type** (required) - This field determines how you would like the requester to respond to the question. The options include:

    - **Text (Single Line)** - Allows the requester to respond with a single text line.

    - **Text (Multi-Line)** - Allows the requester to respond with multiple lines of text.

    - **Numeric Text Box** - Requires the user to enter a number in the response text box.

    - **Yes/No** - Gives the requester the Yes or No option for response.

    - **Dropdown List (Pick One)** - Allows the requester to choose one response from a list of responses presented in a drop-down list. When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

    - **Multiple Choice (Pick One)** - Allows the requester to choose one response from a list of responses presented as a multiple choice list .When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **Multiple Select (Pick Many)** - Allows the requester to choose multiple responses from a list of responses presented as a multiple choice list . When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **File Upload** - Allows you to attach a file that the requester can view when submitting the response. When you choose this option, the **Attach File** option will display near the bottom of the window, where you can click Upload to attach a file.

- **Date** - Allows the requester to enter a date as a response to the question.

- **Agree/Disagree** - Presents to requester with the option to agree or disagree as a response.

- **Confirm (Single Checkbox)** - Presents the requester with a text statement and a checkbox that allows them to confirm the text. When you select this option the Checkbox text field will display. You are required to enter text in the text box. The **Attach File** option will also display near the bottom of the window, where you can click Upload to attach a file.

- **Visibility** - This optional field allows you to control the visibility of the field based on information entered in another field. Click Add Conditional Visibility . Locate the appropriate field and click on it, then click the **Next** button. The configured responses for that question will display. Click on the response(s) that should trigger the visibility of the question. When you have completed this click **Save Changes**.

- **Display Order** (required) - Select where the field will fall in display order within the group (options will vary based on the number of questions in the group). **Note:** This is only displayed if there is more than one field.

- **Checkbox Text** - This field is only displayed if you have selected a **Confirm (Single Checkbox)** field type. This is where to enter the text that will be displayed next the checkbox that the user confirms when they select the checkbox.

- **Response is Required** (checkbox) - Click this checkbox to require the requester to enter information in the field.

- **Question Text is Searchable** (checkbox) - Click this checkbox to make the question searchable in document search for requests created from the template. This will also make the template searchable in product search once it is finalized.

- **Send to Supplier** - Click this checkbox to allow this field to be included on PO distribution documents.

- **Field Values** - This field is displayed if you have selected a **Dropdown List** or **Multiple Choice**, or **Multiple Select** field type. This is where to enter the options that are available for the user to select in the dropdown or multiple choice field. Enter a value in the **Option** field, then select **+ Add Option**. Continue this process until you have added all responses. They are listed in reverse order, so add the bottom of the list first. Click the Remove button to delete an option.

- **Attach File** - This field is displayed if you have selected the **File Upload** or **Confirm (Single Checkbox)** field type. Click **Upload** to attach a file to the field.

f. Click **Save Changes**.

g. Once a field is created, these options are available from the drop-down menu next to the field:

- **Edit** - Select to make changes to the field settings.

- **Set Default Value** - Select to display a default response automatically to the end user who is filling out the form. This is useful when you would like to suggest a response or have a common response display by default. A default response can be set as "read only", meaning the end user cannot change the response. If the read only option is not set, end users cannot override the default response when filling out the form.

- **Delete** - Select to remove the field.

Add Invoice Date

The **Invoice Date** field can be added once to a request template.

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, locate the page and group in which you would like to add the Invoice Date field.

d. Within the group, click and select **Add Invoice Date**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The Invoice Date field is immediately displayed in the group.

Add Need By Date

The **Need By Date** field can be added once to a request template.

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, locate the page and group in which you would like to add the question.

d. Within the group, click and select **Add Need By Date**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The Need By Date field is immediately displayed in the group.

Ability to Set Default Responses

Forms administrators have the capability to set default responses for questions or form fields. A default response displays automatically to the end user who is filling out the form. This is useful when you would like to suggest a response or have a common response display by default. A default question or field response can be set as "read only", meaning the end user cannot change the response. If the read only option is not set, end users cannot override the default response when filling out the form.

For most questions, you have the ability to set a default value for the response. This value displays automatically to the user filling out the form. **Note**: There are some fields that do not allow default responses. When this is the case the Set Default Value option is not available.

To set a default response:

a. Add a question or locate one that has been included on the request by default.

b. Click the drop-down arrow on the Edit button next to the question Edit ▾ .

c. Select **Set Default Value**.

d. Enter the default information in the **Default Value** field. The response options vary depending on the question type.

e. To make the response read only, click the **Read Only** checkbox. **Important Note**: Selecting this option means an end user is not able to change it when filling out a form.

f. Click **Save Changes**.

Ability to Provide Instructions within the Question or Field Groups

Form fields and questions are often grouped by similarity. For example, questions related to shipping information may be grouped together within the Form Fields screen. Instructions can be included at the group level through general group setup. However, in some cases it may be necessary to provide instructions at certain points within the group. The Add HTML field allows you to include instructional text within a group of fields or questions. HTML fields are added in the same manner that other fields and questions are added but contain read only information that provides instructions for specific questions/fields within the group.

To add an instructional field to the group:

a. Add a group or locate one that has been included on the form by default.

b. Click Add ▾ and select **Add HTML Area**. The **Add HTML** window displays.

c. In the **Name** field, enter a name for the HTML field.

d. In the text area, enter the text for the instructions.

e. Like other form fields and questions, you can configure conditional visibility for the text field and determine it's placement. Configure those settings.

f. Click **Save Changes**. The field will be added.

Product Line Items

The **Product Line Items** section allows you to manage the Quick Quote product items that will be sent to suppliers for evaluation. These items will be attached to the quick quote email that is sent to all suppliers that have been added to the Quick Quote request.

- If you are not including product line items in the template, the section can be hidden from end user by clicking the **Hidden Section** checkbox.

- Product line items can be configured by the forms administrator when the template is set up. When this is the case, any requests created from the template will inherit this information. The shopper is not able to edit the line items.

a. Open a draft copy of the request template you wish to change.

b. Click **Product Line Items** in the left menu.

c. Click the [Add Product Line Item] button. The **Add Product Line Item** window opens.

d. Complete these fields to configure the line item:

- **Name** (required) - Enter the line item name. This is usually the product name.

- **Description** - Enter a description for the line item.

- **Catalog Number** - If applicable, enter the catalog number for the item.

- **Quantity** (required) - Enter the quantity for the line item.

- **Unit of Measure** - If applicable, select the unit of measure for the line item from the drop-down menu.

e. Click **Save Changes**

f. Repeat the steps above to include additional line items.

Service Line Items

The **Service Line Items** section allows you to manage their Quick Quote service items that will be sent to suppliers for evaluation. These items will be attached to the quick quote email that is sent to all suppliers that have been added to the Quick Quote request.

- If you are not including service line items in the template, the section can be hidden from end user by clicking the **Hide Section** checkbox.

- Service line items can be configured by the forms administrator when the template is set up. When this is the case, any requests created from the template will inherit this information. The shopper is not able to edit the line items.

a. Click the **Add Service Line Item** button. The **Add Service Line Item** window opens.

b. Configure the line item:

  - **Name** (required) - Enter the line item name. This is usually the product name.

  - **Description** - Enter a description for the line item.

  - **Service Start Date** - If applicable, enter a service start date. Click the ▦ and select the date.

  - **Service End Date** - If applicable, enter a service end date. Click the ▦ and select the date

  - **Quantity** (required) - Enter the quantity for the line item.

  - **Unit of Measure** - If applicable, select the unit of measure for the line item from the drop-down menu.

c. Click **Save Changes**.

d. Repeat the steps above to include additional line items.

Suppliers

The **Suppliers** section is available on Procurement (non-catalog item) and Quick Quote request templates. If you choose to add suppliers to a template, those suppliers will automatically be included on any requests created from that template. You can select from your registered suppliers or manually include ad-hoc suppliers.

- *For Procurement (non-catalog item) requests*, if suppliers are selected on a template, shoppers can only choose from the suppliers you have included. They cannot choose another supplier. This allows a forms administrator to manage the suppliers from which shoppers can purchase with the request. If you do not include suppliers

on the template, shoppers are able to choose a supplier on the request.

- *For Quick Quote requests*, if suppliers are selected on a template, shoppers do have the option to keep or remove suppliers from the list provided by the administrator, and they can also search for and add suppliers to the request.

> **Note:** *For Check requests*, the Supplier option is not displayed on the request template, it appears by default on requests created by users. When a user selects a supplier on a check request, **Additional Information** and **Codes** sections are also displayed.

Follow these steps to add suppliers to a request template:

a. Click **Suppliers** in the left menu. If suppliers have been added to the template, they are displayed on the **Template Suppliers** tab. If there are no suppliers, you will be taken directly to the **Add Suppliers to Template** tab.

b. Click the **Add Suppliers to Template** tab if you are not on it.

c. Add a supplier using one of the following methods:

- **Search Registered Suppliers** - Enter search criteria in the fields. To search by commodity code, click the ✏ button to the right of the Commodity Code field and select one or more of the available codes. When you have entered all the search criteria, click **Q Search** . The search results display. Click the **Add** button for each supplier in the search results that you would like to include on the request template.

- **Manually Add a Supplier** - Click the **Manually Add Suppliers** button. Enter supplier information in the overlay and select a distribution method (required). Click **Save**, or **Save and Add Another** to save the supplier and immediately add another supplier.

d. Selected and manually added suppliers are displayed on the **Template Suppliers** tab. These actions are available:

- Click the **supplier name** to view general information from the supplier profile.

- Click **Remove** to remove a supplier from selection.

- Click **Make default** next to the supplier you want to be selected by default on requests created from the template. This will save users submitting the request a step –they will only need to click on the Supplier page if a different supplier is needed for the request. Click the button next to a different supplier to change the default supplier, or click **Undo default** to remove the designation entirely.

Review and Finalize

The **Review and Finalize** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

Once all fields are completed, click the **Finalize and Activate Template** button.

> **Important Note:** Once a template is finalized, it cannot be edited or deleted. It can only be viewed, copied or archived.

Create a Check Request Template

Check requests are used to create accounting transactions that require a payment to be issued. They are typically used to issue refunds, payment from a clearing account or reductions of revenue. Check requests can bypass the **Add to Cart** feature. When a check request has been submitted, a non-PO invoice will be generated with the check request information attached.

Configure the request by moving through the steps in the wizard. As you complete each step, click the **Save Progress** button to save the information and remain on the page. Click the **Next** button to save the information and move to the next step. A green check ✔ will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the ✔ by default.

Not all steps are required to build the template. For example, you are not required to include attachments.

1. Navigate to **Shop** ▣ **> Shopping Settings > Manage Request Templates**.

2. Choose one:

    - *Create a Request Template* - Click **Build a New Template**. Enter a **Template Title** and select a request **Purpose**, then click **Submit**.

    - *Update a Request Template* - Locate the request template you want to update. Either click the **Actions** button and select **Edit Draft**, or open the template, click **Choose Other Version** and select **Draft**.

3. Complete these screens

Template Setup

The **Template Setup** screen contains the highest level information about the template. It is displayed as the **Details** section on requests created from the template. You can choose to hide this section, in which case it will not be an option on requests.

Complete these fields:

- **Template Title** (required) - The template name. Template title is configured when the template is created but can be edited on this page.

- **Purpose** - This is a read-only field that indicates the purpose of the request. The purpose is selected when a request template is created.

- **Version Description** - If you are creating a new version of a request, enter a description of the template version if desired.

- **Form Type** (required) - Indicates the form type. Select the appropriate form type from the drop-down field. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization. At least one form type must be available to create a template. Please contact your system administrator for additional information about your organization's form types.

- **Searchable Keywords** - Enter keywords in the text field. Keywords entered in this field are searchable in document search. Document search will locate requests created from the request template. Keywords in a procurement request are also searchable in product search.

- **Currency** (Procurement requests only) - Select a currency for the request. **Note:** If you select a currency on the template, end users cannot change it when filling out the request.

- **Hidden Section** - Hiding a section removes an unnecessary request area from the finalized templates, allowing end users to focus on the information that is really needed. Click the Hidden Section checkbox to hide the section.

Instructions

The **Instructions** page provides information that would be helpful when filling out the request. For example, if you have included required questions, you may want to indicate this in the instructions. Instructions configured in the template will be inherited in requests created from the template.

To include instructions, simply type the text in to the field. Several formatting options are available. The form creator is not required to enter instructions. This field may be left blank. If the field is left blank, the Instructions option will not be displayed on requests created from the template.

Questions

In general, **configuring request questions** is similar to other questions in the application, they are organized by page and group. Once you've added at a page or group to the Questions section, there are four options for adding questions:

- **Add Question** - The **Add Question** option can be used to add questions to a request that users complete when they submit the request.

- **Add Invoice Date** - The **Invoice Date** field can be added once to a request template.

- **Add Need By Date** - The **Need By Date** field can be added once to a request template.

- **Add HTML Area** - The Add HTML field allows you to include instructional text within a group of fields or questions.

In addition, there are some capabilities unique to questions in requests: you can set default responses and provide instructions within a question group using the Add HTML Area option.

Add a Question Page or Group

    a. Open a draft copy of the request template you wish to change.

    b. Click **Questions** in the left menu.

    c. In the right panel, near the top of the page, click the button and select **Add Question Page** or **Add Question Group**.

    d. Complete these fields in the **Add Question Page** or **Add Question Group** window:

- **Page Title** / **Group Name** - Enter the title that will appear at the top of the page or the name that will appear in the group header.

- **Add Instructions** - If you select **Yes**, a text configuration area will display. Add and format the text that will appear at the top of the page or group.

- **Visibility** - This optional field allows you to control the visibility of the page or group based on information entered in another field.

- **Display Order** - If there is more than one page or group, select where it will display.

    e. Click **Save Changes**.

Add Question

Questions are used to gather information about an order. The **Add Question** option can be used to add questions to a request that users complete when they submit the request.

    a. Open a draft copy of the request template you wish to change.

    b. Click **Questions** in the left menu.

    c. In the right panel, locate the page and group in which you would like to add the question.

    d. Within the group, click and select **Add Question**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The **Add Question** window opens.

e. Complete these options in the **Add Field** window to define how the field will function on requests created from the template:

- **Question Text** (required) - Enter the question. This is the question that will display to the requester so be sure to be clear and concise about the information you are gathering.

- **Add Help Text** - You have the option to include help text specific to the question. If you select **Yes**, a text configuration area will display. Add and format the text.

- **Response Type** (required) - This field determines how you would like the requester to respond to the question. The options include:

  - **Text (Single Line)** - Allows the requester to respond with a single text line.

  - **Text (Multi-Line)** - Allows the requester to respond with multiple lines of text.

  - **Numeric Text Box** - Requires the user to enter a number in the response text box.

  - **Yes/No** - Gives the requester the Yes or No option for response.

  - **Dropdown List (Pick One)** - Allows the requester to choose one response from a list of responses presented in a drop-down list. When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

  - **Multiple Choice (Pick One)** - Allows the requester to choose one response from a list of responses presented as a multiple choice list .When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

  - **Multiple Select (Pick Many)** - Allows the requester to choose multiple responses from a list of responses presented as a multiple choice list . When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for

the drop-down.

- **File Upload** - Allows you to attach a file that the requester can view when submitting the response. When you choose this option, the **Attach File** option will display near the bottom of the window, where you can click Upload to attach a file.

- **Date** - Allows the requester to enter a date as a response to the question.

- **Agree/Disagree** - Presents to requester with the option to agree or disagree as a response.

- **Confirm (Single Checkbox)** - Presents the requester with a text statement and a checkbox that allows them to confirm the text. When you select this option the Checkbox text field will display. You are required to enter text in the text box. The **Attach File** option will also display near the bottom of the window, where you can click Upload to attach a file.

- **Visibility** - This optional field allows you to control the visibility of the field based on information entered in another field. Click **Add Conditional Visibility**. Locate the appropriate field and click on it, then click the **Next** button. The configured responses for that question will display. Click on the response(s) that should trigger the visibility of the question. When you have completed this click **Save Changes**.

- **Display Order** (required) - Select where the field will fall in display order within the group (options will vary based on the number of questions in the group). **Note:** This is only displayed if there is more than one field.

- **Checkbox Text** - This field is only displayed if you have selected a **Confirm (Single Checkbox)** field type. This is where to enter the text that will be displayed next the checkbox that the user confirms when they select the checkbox.

- **Response is Required** (checkbox) - Click this checkbox to require the requester to enter information in the field.

- **Question Text is Searchable** (checkbox) - Click this checkbox to make the question searchable in document search for requests created from the template. This will also make the template searchable in product search once

it is finalized.

- **Send to Supplier** - Click this checkbox to allow this field to be included on PO distribution documents.

- **Field Values** - This field is displayed if you have selected a **Dropdown List** or **Multiple Choice**, or **Multiple Select** field type. This is where to enter the options that are available for the user to select in the dropdown or multiple choice field. Enter a value in the **Option** field, then select **+ Add Option**. Continue this process until you have added all responses. They are listed in reverse order, so add the bottom of the list first. Click the Remove button to delete an option.

- **Attach File** - This field is displayed if you have selected the **File Upload** or **Confirm (Single Checkbox)** field type. Click **Upload** to attach a file to the field.

f. Click **Save Changes**.

g. Once a field is created, these options are available from the drop-down menu next to the field:

- **Edit** - Select to make changes to the field settings.

- **Set Default Value** - Select to display a default response automatically to the end user who is filling out the form. This is useful when you would like to suggest a response or have a common response display by default. A default response can be set as "read only", meaning the end user cannot change the response. If the read only option is not set, end users cannot override the default response when filling out the form.

- **Delete** - Select to remove the field.

Add Invoice Date

The **Invoice Date** field can be added once to a request template.

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, locate the page and group in which you would like to add the Invoice Date field.

d. Within the group, click [Add ▾] and select **Add Invoice Date**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The Invoice Date field is immediately displayed in the group.

Add Need By Date

The **Need By Date** field can be added once to a request template.

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, locate the page and group in which you would like to add the question.

d. Within the group, click [Add ▾] and select **Add Need By Date**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The Need By Date field is immediately displayed in the group.

Ability to Set Default Responses

Forms administrators have the capability to set default responses for questions or form fields. A default response displays automatically to the end user who is filling out the form. This is useful when you would like to suggest a response or have a common response display by default. A default question or field response can be set as "read only", meaning the end user cannot change the response. If the read only option is not set, end users cannot override the default response when filling out the form.

For most questions, you have the ability to set a default value for the response. This value displays automatically to the user filling out the form. **Note**: There are some fields that do not allow default responses. When this is the case the Set Default Value option is not available.

To set a default response:

a. Add a question or locate one that has been included on the request by default.

b. Click the drop-down arrow on the Edit button next to the question [Edit ▾].

c. Select **Set Default Value**.

d. Enter the default information in the **Default Value** field. The response options vary depending on the question type.

e. To make the response read only, click the **Read Only** checkbox. **Important Note**: Selecting this option means an end user is not able to change it when filling out a form.

f. Click **Save Changes**.

Ability to Provide Instructions within the Question or Field Groups

Form fields and questions are often grouped by similarity. For example, questions related to shipping information may be grouped together within the Form Fields screen. Instructions can be included at the group level through general group setup. However, in some cases it may be necessary to provide instructions at certain points within the group. The Add HTML field allows you to include instructional text within a group of fields or questions. HTML fields are added in the same manner that other fields and questions are added but contain read only information that provides instructions for specific questions/fields within the group.

To add an instructional field to the group:

a. Add a group or locate one that has been included on the form by default.

b. Click **Add ▼** and select **Add HTML Area**. The **Add HTML** window displays.

c. In the **Name** field, enter a name for the HTML field.

d. In the text area, enter the text for the instructions.

e. Like other form fields and questions, you can configure conditional visibility for the text field and determine it's placement. Configure those settings.

f. Click **Save Changes**. The field will be added.

Attachments

Attachments can be added to a request template and those attachments are inherited by requests created from the template. Shoppers can also add attachments when filling out the request. You can choose to hide the Attachments section, in which case it will not be an option on requests.

Note: Attachments on a Check Request form are copied to the associated invoice.

Add attachments to the request template

    a. Click **Add Attachment**. The Add Attachment overlay opens.

    b. Click the **Upload** button. The Upload overlay opens.

    c. Enter a **title** for the attachment (required).

    d. Click **Choose File**, then browse to and select the file to upload.

    e. Click **Save Changes**.

    f. Repeat the steps above for additional attachments.

Hide the Attachments section

    a. Click the **Hidden Section** checkbox to hide the Attachments section from end users who are completing requests created from the template.

Review and Finalize

The **Review and Finalize** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

Once all fields are completed, click the **Finalize and Activate Template** button.

> **Important Note:** Once a template is finalized, it cannot be edited or deleted. It can only be viewed, copied or archived.

Create a Multi-Check Request Template

Multi-check requests are a type of check request that allows users to create one check request with multiple items on the same form. For example, a user who is submitting expenses for a trip can add items for car rental, hotel rental and food expenses to one multi-check request.

- Configuration of Multi-Check Request templates is similar to Check Request templates with the exception of the **Supplier Invoice Number** field on the Questions page:

- On multi-check request templates, the **Response Is Required** checkbox is editable. If the checkbox is blank on the template (i.e., a response is not required), when users submit a request, they can leave the field blank. On check request templates this field is set to

"Response is Required" and cannot be changed.

- When a Multi-Check Request has been submitted, the system will create a separate invoice for each form on a multi-check request. The invoice number is displayed in the "sticker" area of each form near the top left corner of the page.

Configure the request by moving through the steps in the wizard. As you complete each step, click the **Save Progress** button to save the information and remain on the page. Click the **Next** button to save the information and move to the next step. A green check ✔ will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the ✔ by default.

Not all steps are required to build the template. For example, you are not required to include attachments.

1. Navigate to **Shop** ▭ **> Shopping Settings > Manage Request Templates**.

2. Choose one:

   - *Create a Request Template* - Click **Build a New Template**. Enter a **Template Title** and select a request **Purpose**, then click **Submit**.

   - *Update a Request Template* - Locate the request template you want to update. Either click the **Actions** button and select **Edit Draft**, or open the template, click **Choose Other Version** and select **Draft**.

3. Complete these screens

Template Setup

The **Template Setup** screen contains the highest level information about the template. It is displayed as the **Details** section on requests created from the template. You can choose to hide this section, in which case it will not be an option on requests.

Complete these fields:

- **Template Title** (required) - The template name. Template title is configured when the template is created but can be edited on this page.

- **Purpose** - This is a read-only field that indicates the purpose of the request. The purpose is selected when a request template is created.

- **Version Description** - If you are creating a new version of a request, enter a description of the template version if desired.

- **Form Type** (required) - Indicates the form type. Select the appropriate form type from the drop-down field. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization. At least one form type must be available to create a template. Please contact your system administrator for additional information about your organization's form types.

- **Searchable Keywords** - Enter keywords in the text field. Keywords entered in this field are searchable in document search. Document search will locate requests created from the request template. Keywords in a procurement request are also searchable in product search.

- **Currency** (Procurement requests only) - Select a currency for the request. **Note:** If you select a currency on the template, end users cannot change it when filling out the request.

- **Hidden Section** - Hiding a section removes an unnecessary request area from the finalized templates, allowing end users to focus on the information that is really needed. Click the Hidden Section checkbox to hide the section.

Instructions

The **Instructions** page provides information that would be helpful when filling out the request. For example, if you have included required questions, you may want to indicate this in the instructions. Instructions configured in the template will be inherited in requests created from the template.

To include instructions, simply type the text in to the field. Several formatting options are available. The form creator is not required to enter instructions. This field may be left blank. If the field is left blank, the Instructions option will not be displayed on requests created from the template.

Questions

In general, **configuring request questions** is similar to other questions in the application, they are organized by page and group. Once you've added at a page or group to the Questions section, there are four options for adding questions:

- **Add Question** - The **Add Question** option can be used to add questions to a request that users complete when they submit the request.

- **Add Invoice Date** - The **Invoice Date** field can be added once to a request template.

- **Add Need By Date** - The **Need By Date** field can be added once to a request template.

- **Add HTML Area** - The Add HTML field allows you to include instructional text within a group of fields or questions.

In addition, there are some capabilities unique to questions in requests: you can set default responses and provide instructions within a question group using the Add HTML Area option.

Add a Question Page or Group

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, near the top of the page, click the [Add ▾] button and select **Add Question Page** or **Add Question Group**.

d. Complete these fields in the **Add Question Page** or **Add Question Group** window:

- **Page Title** / **Group Name** - Enter the title that will appear at the top of the page or the name that will appear in the group header.

- **Add Instructions** - If you select **Yes**, a text configuration area will display. Add and format the text that will appear at the top of the page or group.

- **Visibility** - This optional field allows you to control the visibility of the page or group based on information entered in another field.

- **Display Order** - If there is more than one page or group, select where it will display.

e. Click **Save Changes**.

Add Question

Questions are used to gather information about an order. The **Add Question** option can be used to add questions to a request that users complete when they submit the request.

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, locate the page and group in which you would like to add the question.

d. Within the group, click [Add ▾] and select **Add Question**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The **Add Question** window opens.

e. Complete these options in the **Add Field** window to define how the field will function on requests created from the template:

- **Question Text** (required) - Enter the question. This is the question that will display to the requester so be sure to be clear and concise about the information you are gathering.

- **Add Help Text** - You have the option to include help text specific to the question. If you select **Yes**, a text configuration area will display. Add and format the text.

- **Response Type** (required) - This field determines how you would like the requester to respond to the question. The options include:

  - **Text (Single Line)** - Allows the requester to respond with a single text line.

  - **Text (Multi-Line)** - Allows the requester to respond with multiple lines of text.

  - **Numeric Text Box** - Requires the user to enter a number in the response text box.

  - **Yes/No** - Gives the requester the Yes or No option for response.

- **Dropdown List (Pick One)** - Allows the requester to choose one response from a list of responses presented in a drop-down list. When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **Multiple Choice (Pick One)** - Allows the requester to choose one response from a list of responses presented as a multiple choice list .When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **Multiple Select (Pick Many)** - Allows the requester to choose multiple responses from a list of responses presented as a multiple choice list . When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **File Upload** - Allows you to attach a file that the requester can view when submitting the response. When you choose this option, the **Attach File** option will display near the bottom of the window, where you can click Upload to attach a file.

- **Date** - Allows the requester to enter a date as a response to the question.

- **Agree/Disagree** - Presents to requester with the option to agree or disagree as a response.

- **Confirm (Single Checkbox)** - Presents the requester with a text statement and a checkbox that allows them to confirm the text. When you select this option the Checkbox text field will display. You are required to enter text in the text box. The **Attach File** option will also display near the bottom of the window, where you can click Upload to attach a file.

- **Visibility** - This optional field allows you to control the visibility of the field based on information entered in another field. Click Add Conditional Visibility . Locate the appropriate field and click on it, then click the **Next** button. The configured responses for that question will display. Click on the response(s) that should trigger the visibility of the question. When you have completed this click **Save Changes**.

- **Display Order** (required) - Select where the field will fall in display order within the group (options will vary based on the number of questions in the group). **Note:** This is only displayed if there is more than one field.

- **Checkbox Text** - This field is only displayed if you have selected a **Confirm (Single Checkbox)** field type. This is where to enter the text that will be displayed next the checkbox that the user confirms when they select the checkbox.

- **Response is Required** (checkbox) - Click this checkbox to require the requester to enter information in the field.

- **Question Text is Searchable** (checkbox) - Click this checkbox to make the question searchable in document search for requests created from the template. This will also make the template searchable in product search once it is finalized.

- **Send to Supplier** - Click this checkbox to allow this field to be included on PO distribution documents.

- **Field Values** - This field is displayed if you have selected a **Dropdown List** or **Multiple Choice**, or **Multiple Select** field type. This is where to enter the options that are available for the user to select in the dropdown or multiple choice field. Enter a value in the **Option** field, then select **+ Add Option**. Continue this process until you have added all responses. They are listed in reverse order, so add the bottom of the list first. Click the Remove button to delete an option.

- **Attach File** - This field is displayed if you have selected the **File Upload** or **Confirm (Single Checkbox)** field type. Click **Upload** to attach a file to the field.

f. Click **Save Changes**.

g. Once a field is created, these options are available from the drop-down menu next to the field:

- **Edit** - Select to make changes to the field settings.

- **Set Default Value** - Select to display a default response automatically to the end user who is filling out the form. This is useful when you would like to suggest a response or have a common response display by default. A default response can be set as "read only", meaning the end user cannot change the

response. If the read only option is not set, end users cannot override the default response when filling out the form.

- **Delete** - Select to remove the field.

Add Invoice Date

The **Invoice Date** field can be added once to a request template.

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, locate the page and group in which you would like to add the Invoice Date field.

d. Within the group, click [Add ▾] and select **Add Invoice Date**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The Invoice Date field is immediately displayed in the group.

Add Need By Date

The **Need By Date** field can be added once to a request template.

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, locate the page and group in which you would like to add the question.

d. Within the group, click [Add ▾] and select **Add Need By Date**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The Need By Date field is immediately displayed in the group.

Ability to Set Default Responses

Forms administrators have the capability to set default responses for questions or form fields. A default response displays automatically to the end user who is filling out the form. This is useful when you would like to suggest a response or have a common response display by default. A default question or field response can be set as "read only", meaning the end user cannot change the response. If the read only option is not set, end users cannot override the default response when filling out the form.

For most questions, you have the ability to set a default value for the response. This value displays automatically to the user filling out the form. **Note**: There are some fields that do not allow default responses. When this is the case the Set Default Value option is not available.

To set a default response:

  a. Add a question or locate one that has been included on the request by default.

  b. Click the drop-down arrow on the Edit button next to the question Edit ▾.

  c. Select **Set Default Value**.

  d. Enter the default information in the **Default Value** field. The response options vary depending on the question type.

  e. To make the response read only, click the **Read Only** checkbox. **Important Note**: Selecting this option means an end user is not able to change it when filling out a form.

  f. Click **Save Changes**.

Ability to Provide Instructions within the Question or Field Groups

Form fields and questions are often grouped by similarity. For example, questions related to shipping information may be grouped together within the Form Fields screen. Instructions can be included at the group level through general group setup. However, in some cases it may be necessary to provide instructions at certain points within the group. The Add HTML field allows you to include instructional text within a group of fields or questions. HTML fields are added in the same manner that other fields and questions are added but contain read only information that provides instructions for specific questions/fields within the group.

To add an instructional field to the group:

  a. Add a group or locate one that has been included on the form by default.

  b. Click Add ▾ and select **Add HTML Area**. The **Add HTML** window displays.

  c. In the **Name** field, enter a name for the HTML field.

  d. In the text area, enter the text for the instructions.

e. Like other form fields and questions, you can configure conditional visibility for the text field and determine it's placement. Configure those settings.

f. Click **Save Changes**. The field will be added.

Attachments

Attachments can be added to a request template and those attachments are inherited by requests created from the template. Shoppers can also add attachments when filling out the request. You can choose to hide the Attachments section, in which case it will not be an option on requests.

Note: Attachments on a Check Request form are copied to the associated invoice.

Add attachments to the request template

a. Click **Add Attachment**. The Add Attachment overlay opens.

b. Click the **Upload** button. The Upload overlay opens.

c. Enter a **title** for the attachment (required).

d. Click **Choose File**, then browse to and select the file to upload.

e. Click **Save Changes**.

f. Repeat the steps above for additional attachments.

Hide the Attachments section

a. Click the **Hidden Section** checkbox to hide the Attachments section from end users who are completing requests created from the template.

Review and Finalize

The **Review and Finalize** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

Once all fields are completed, click the **Finalize and Activate Template** button.

> **Important Note:** Once a template is finalized, it cannot be edited or deleted. It can only be viewed, copied or archived.

Create a Credit Memo Request Template

Credit memo requests are used to create a credit memo and send it through approval workflow.

Configure the request by moving through the steps in the wizard. As you complete each step, click the **Save Progress** button to save the information and remain on the page. Click the **Next** button to save the information and move to the next step. A green check ✔ will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the ✔ by default.

Not all steps are required to build the template. For example, you are not required to include attachments.

1. Navigate to **Shop** 🖳 **> Shopping Settings > Manage Request Templates**.

2. Choose one:

   - *Create a Request Template* - Click **Build a New Template**. Enter a **Template Title** and select a request **Purpose**, then click **Submit**.

   - *Update a Request Template* - Locate the request template you want to update. Either click the **Actions** button and select **Edit Draft**, or open the template, click **Choose Other Version** and select **Draft**.

3. Complete these screens

Template Setup

The **Template Setup** screen contains the highest level information about the template. It is displayed as the **Details** section on requests created from the template. You can choose to hide this section, in which case it will not be an option on requests.

Complete these fields:

- **Template Title** (required) - The template name. Template title is configured when the template is created but can be edited on this page.

- **Purpose** - This is a read-only field that indicates the purpose of the request. The purpose is selected when a request template is created.

- **Version Description** - If you are creating a new version of a request, enter a description of the template version if desired.

- **Form Type** (required) - Indicates the form type. Select the appropriate form type from the drop-down field. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization. At least one form type must be available to create a template. Please contact your system administrator for additional information about your organization's form types.

- **Searchable Keywords** - Enter keywords in the text field. Keywords entered in this field are searchable in document search. Document search will locate requests created from the request template. Keywords in a procurement request are also searchable in product search.

- **Currency** (Procurement requests only) - Select a currency for the request. **Note:** If you select a currency on the template, end users cannot change it when filling out the request.

- **Hidden Section** - Hiding a section removes an unnecessary request area from the finalized templates, allowing end users to focus on the information that is really needed. Click the Hidden Section checkbox to hide the section.

Instructions

The **Instructions** page provides information that would be helpful when filling out the request. For example, if you have included required questions, you may want to indicate this in the instructions. Instructions configured in the template will be inherited in requests created from the template.

To include instructions, simply type the text in to the field. Several formatting options are available. The form creator is not required to enter instructions. This field may be left blank. If the field is left blank, the Instructions option will not be displayed on requests created from the template.

Questions

In general, **configuring request questions** is similar to other questions in the application, they are organized by page and group. Once you've added at a page or group to the Questions section, there are four options for adding questions:

- **Add Question** - The **Add Question** option can be used to add questions to a request that users complete when they submit the request.

- **Add Invoice Date** - The **Invoice Date** field can be added once to a request template.

- **Add Need By Date** - The **Need By Date** field can be added once to a request template.

- **Add HTML Area** - The Add HTML field allows you to include instructional text within a group of fields or questions.

In addition, there are some capabilities unique to questions in requests: you can set default responses and provide instructions within a question group using the Add HTML Area option.

Add a Question Page or Group

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, near the top of the page, click the [Add ▼] button and select **Add Question Page** or **Add Question Group**.

d. Complete these fields in the **Add Question Page** or **Add Question Group** window:

- **Page Title** / **Group Name** - Enter the title that will appear at the top of the page or the name that will appear in the group header.

- **Add Instructions** - If you select **Yes**, a text configuration area will display. Add and format the text that will appear at the top of the page or group.

- **Visibility** - This optional field allows you to control the visibility of the page or

group based on information entered in another field.

- **Display Order** - If there is more than one page or group, select where it will display.

e. Click **Save Changes**.

Add Question

Questions are used to gather information about an order. The **Add Question** option can be used to add questions to a request that users complete when they submit the request.

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, locate the page and group in which you would like to add the question.

d. Within the group, click [Add ▾] and select **Add Question**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The **Add Question** window opens.

e. Complete these options in the **Add Field** window to define how the field will function on requests created from the template:

- **Question Text** (required) - Enter the question. This is the question that will display to the requester so be sure to be clear and concise about the information you are gathering.

- **Add Help Text** - You have the option to include help text specific to the question. If you select **Yes**, a text configuration area will display. Add and format the text.

- **Response Type** (required) - This field determines how you would like the requester to respond to the question. The options include:

- **Text (Single Line)** - Allows the requester to respond with a single text line.

- **Text (Multi-Line)** - Allows the requester to respond with multiple lines of text.

- **Numeric Text Box** - Requires the user to enter a number in the response text box.

- **Yes/No** - Gives the requester the Yes or No option for response.

- **Dropdown List (Pick One)** - Allows the requester to choose one response from a list of responses presented in a drop-down list. When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **Multiple Choice (Pick One)** - Allows the requester to choose one response from a list of responses presented as a multiple choice list .When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **Multiple Select (Pick Many)** - Allows the requester to choose multiple responses from a list of responses presented as a multiple choice list . When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **File Upload** - Allows you to attach a file that the requester can view when submitting the response. When you choose this option, the **Attach File** option will display near the bottom of the window, where you can click Upload to attach a file.

- **Date** - Allows the requester to enter a date as a response to the question.

- **Agree/Disagree** - Presents to requester with the option to agree or disagree as a response.

- **Confirm (Single Checkbox)** - Presents the requester with a text statement and a checkbox that allows them to confirm the text. When you select this option the Checkbox text field will display. You are required to enter text in the text box. The **Attach File** option will also display near the bottom of the window, where you can click Upload to attach a file.

- **Visibility** - This optional field allows you to control the visibility of the field based on information entered in another field. Click Add Conditional Visibility . Locate the appropriate field and click on it, then click the **Next** button. The configured responses for that question will display. Click on the response(s) that should trigger the visibility of the question. When you have completed this click **Save Changes**.

- **Display Order** (required) - Select where the field will fall in display order within the group (options will vary based on the number of questions in the group). **Note:** This is only displayed if there is more than one field.

- **Checkbox Text** - This field is only displayed if you have selected a **Confirm (Single Checkbox)** field type. This is where to enter the text that will be displayed next the checkbox that the user confirms when they select the checkbox.

- **Response is Required** (checkbox) - Click this checkbox to require the requester to enter information in the field.

- **Question Text is Searchable** (checkbox) - Click this checkbox to make the question searchable in document search for requests created from the template. This will also make the template searchable in product search once it is finalized.

- **Send to Supplier** - Click this checkbox to allow this field to be included on PO distribution documents.

- **Field Values** - This field is displayed if you have selected a **Dropdown List** or **Multiple Choice**, or **Multiple Select** field type. This is where to enter the options that are available for the user to select in the dropdown or multiple choice field. Enter a value in the **Option** field, then select **+ Add Option**. Continue this process until you have added all responses. They are listed in reverse order, so add the bottom of the list first. Click the Remove button to delete an option.

- **Attach File** - This field is displayed if you have selected the **File Upload** or **Confirm (Single Checkbox)** field type. Click **Upload** to attach a file to the field.

   f. Click **Save Changes**.

   g. Once a field is created, these options are available from the drop-down menu next to the field:

- **Edit** - Select to make changes to the field settings.

- **Set Default Value** - Select to display a default response automatically to the end user who is filling out the form. This is useful when you would like to suggest a response or have a common response display by default. A default response can be set as "read only", meaning the end user cannot change the response. If the read only option is not set, end users cannot override the default response when filling out the form.

- **Delete** - Select to remove the field.

Add Invoice Date

The **Invoice Date** field can be added once to a request template.

   a. Open a draft copy of the request template you wish to change.

   b. Click **Questions** in the left menu.

   c. In the right panel, locate the page and group in which you would like to add the Invoice Date field.

   d. Within the group, click **Add ▼** and select **Add Invoice Date**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The Invoice Date field is immediately displayed in the group.

Add Need By Date

The **Need By Date** field can be added once to a request template.

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, locate the page and group in which you would like to add the
    question.

d. Within the group, click [Add ▼] and select **Add Need By Date**. If there are multiple
    groups, be sure you're selecting the Add button for the appropriate group. The Need
    By Date field is immediately displayed in the group.

Ability to Set Default Responses

Forms administrators have the capability to set default responses for questions or form
fields. A default response displays automatically to the end user who is filling out the form.
This is useful when you would like to suggest a response or have a common response
display by default. A default question or field response can be set as "read only", meaning
the end user cannot change the response. If the read only option is not set, end users
cannot override the default response when filling out the form.

For most questions, you have the ability to set a default value for the response. This value
displays automatically to the user filling out the form. **Note**: There are some fields that do
not allow default responses. When this is the case the Set Default Value option is not
available.

To set a default response:

a. Add a question or locate one that has been included on the request by default.

b. Click the drop-down arrow on the Edit button next to the question [Edit ▼].

c. Select **Set Default Value**.

d. Enter the default information in the **Default Value** field. The response options vary
    depending on the question type.

e. To make the response read only, click the **Read Only** checkbox. **Important Note**:
    Selecting this option means an end user is not able to change it when filling out a
    form.

f. Click **Save Changes**.

Ability to Provide Instructions within the Question or Field Groups

Form fields and questions are often grouped by similarity. For example, questions related to shipping information may be grouped together within the Form Fields screen. Instructions can be included at the group level through general group setup. However, in some cases it may be necessary to provide instructions at certain points within the group. The Add HTML field allows you to include instructional text within a group of fields or questions. HTML fields are added in the same manner that other fields and questions are added but contain read only information that provides instructions for specific questions/fields within the group.

To add an instructional field to the group:

a. Add a group or locate one that has been included on the form by default.

b. Click **Add ▼** and select **Add HTML Area**. The **Add HTML** window displays.

c. In the **Name** field, enter a name for the HTML field.

d. In the text area, enter the text for the instructions.

e. Like other form fields and questions, you can configure conditional visibility for the text field and determine it's placement. Configure those settings.

f. Click **Save Changes**. The field will be added.

Attachments

Attachments can be added to a request template and those attachments are inherited by requests created from the template. Shoppers can also add attachments when filling out the request. You can choose to hide the Attachments section, in which case it will not be an option on requests.

Note: Attachments on a Check Request form are copied to the associated invoice.

Add attachments to the request template

a. Click **Add Attachment**. The Add Attachment overlay opens.

b. Click the **Upload** button. The Upload overlay opens.

c. Enter a **title** for the attachment (required).

d. Click **Choose File**, then browse to and select the file to upload.

e. Click **Save Changes**.

f. Repeat the steps above for additional attachments.

Hide the Attachments section

a. Click the **Hidden Section** checkbox to hide the Attachments section from end users who are completing requests created from the template.

Review and Finalize

The **Review and Finalize** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

Once all fields are completed, click the **Finalize and Activate Template** button.

> **Important Note:** Once a template is finalized, it cannot be edited or deleted. It can only be viewed, copied or archived.

Create a Generic Request Template

Generic requests are typically sent to users to request or obtain information for miscellaneous tasks or services. Generally, these will be internal requests. For example, your organization may have a process for requesting an office move. You can create a request template for this type of request that can be submitted through the approval workflow.

Configure the request by moving through the steps in the wizard. As you complete each step, click the **Save Progress** button to save the information and remain on the page. Click the **Next** button to save the information and move to the next step. A green check ✔ will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the ✔ by default.

Not all steps are required to build the template. For example, you are not required to include attachments.

1. Navigate to **Shop** ⊟ **> Shopping Settings > Manage Request Templates**.

2. Choose one:

    - *Create a Request Template* - Click **Build a New Template**. Enter a **Template Title** and select a request **Purpose**, then click **Submit**.

    - *Update a Request Template* - Locate the request template you want to update. Either click the **Actions** button and select **Edit Draft**, or open the template, click **Choose Other Version** and select **Draft**.

3. Complete these screens

Template Setup

The **Template Setup** screen contains the highest level information about the template. It is displayed as the **Details** section on requests created from the template. You can choose to hide this section, in which case it will not be an option on requests.

Complete these fields:

- **Template Title** (required) - The template name. Template title is configured when the template is created but can be edited on this page.

- **Purpose** - This is a read-only field that indicates the purpose of the request. The purpose is selected when a request template is created.

- **Version Description** - If you are creating a new version of a request, enter a description of the template version if desired.

- **Form Type** (required) - Indicates the form type. Select the appropriate form type from the drop-down field. Form types are used to categorize or classify forms and requests. They are configured by an administrator and are specific to your organization. At least one form type must be available to create a template. Please contact your system administrator for additional information about your organization's form types.

- **Searchable Keywords** - Enter keywords in the text field. Keywords entered in this field are searchable in document search. Document search will locate requests created from the request template. Keywords in a procurement request are also searchable in product search.

- **Currency** (Procurement requests only) - Select a currency for the request. **Note:** If you select a currency on the template, end users cannot change it when filling out the request.

- **Hidden Section** - Hiding a section removes an unnecessary request area from the finalized templates, allowing end users to focus on the information that is really needed. Click the Hidden Section checkbox to hide the section.

Instructions

The **Instructions** page provides information that would be helpful when filling out the request. For example, if you have included required questions, you may want to indicate this in the instructions. Instructions configured in the template will be inherited in requests created from the template.

To include instructions, simply type the text in to the field. Several formatting options are available. The form creator is not required to enter instructions. This field may be left blank. If the field is left blank, the Instructions option will not be displayed on requests created from the template.

Attachments

Attachments can be added to a request template and those attachments are inherited by requests created from the template. Shoppers can also add attachments when filling out the request. You can choose to hide the Attachments section, in which case it will not be an option on requests.

Note: Attachments on a Check Request form are copied to the associated invoice.

Add attachments to the request template

a. Click **Add Attachment**. The Add Attachment overlay opens.

b. Click the **Upload** button. The Upload overlay opens.

c. Enter a **title** for the attachment (required).

d. Click **Choose File**, then browse to and select the file to upload.

e. Click **Save Changes**.

f. Repeat the steps above for additional attachments.

Hide the Attachments section

a. Click the **Hidden Section** checkbox to hide the Attachments section from end users who are completing requests created from the template.

Questions

In general, **configuring request questions** is similar to other questions in the application, they are organized by page and group. Once you've added at a page or group to the Questions section, there are four options for adding questions:

- **Add Question** - The **Add Question** option can be used to add questions to a request that users complete when they submit the request.

- **Add Invoice Date** - The **Invoice Date** field can be added once to a request template.

- **Add Need By Date** - The **Need By Date** field can be added once to a request template.

- **Add HTML Area** - The Add HTML field allows you to include instructional text within a group of fields or questions.

In addition, there are some capabilities unique to questions in requests: you can set default responses and provide instructions within a question group using the Add HTML Area option.

Add a Question Page or Group

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, near the top of the page, click the Add button and select **Add Question Page** or **Add Question Group**.

d. Complete these fields in the **Add Question Page** or **Add Question Group** window:

- **Page Title** / **Group Name** - Enter the title that will appear at the top of the page or the name that will appear in the group header.

- **Add Instructions** - If you select **Yes**, a text configuration area will display. Add and format the text that will appear at the top of the page or group.

- **Visibility** - This optional field allows you to control the visibility of the page or group based on information entered in another field.

- **Display Order** - If there is more than one page or group, select where it will display.

e. Click **Save Changes**.

Add Question

Questions are used to gather information about an order. The **Add Question** option can be used to add questions to a request that users complete when they submit the request.

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, locate the page and group in which you would like to add the question.

d. Within the group, click [Add ▼] and select **Add Question**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The **Add Question** window opens.

e. Complete these options in the **Add Field** window to define how the field will function on requests created from the template:

- **Question Text** (required) - Enter the question. This is the question that will display to the requester so be sure to be clear and concise about the information you are gathering.

- **Add Help Text** - You have the option to include help text specific to the question. If you select **Yes**, a text configuration area will display. Add and format the text.

- **Response Type** (required) - This field determines how you would like the requester to respond to the question. The options include:

- **Text (Single Line)** - Allows the requester to respond with a single text line.

- **Text (Multi-Line)** - Allows the requester to respond with multiple lines of text.

- **Numeric Text Box** - Requires the user to enter a number in the response text box.

- **Yes/No** - Gives the requester the Yes or No option for response.

- **Dropdown List (Pick One)** - Allows the requester to choose one response from a list of responses presented in a drop-down list. When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **Multiple Choice (Pick One)** - Allows the requester to choose one response from a list of responses presented as a multiple choice list .When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **Multiple Select (Pick Many)** - Allows the requester to choose multiple responses from a list of responses presented as a multiple choice list . When you choose this option, the **Field Values** field will display near at the bottom of the window, where you can configure the responses for the drop-down.

- **File Upload** - Allows you to attach a file that the requester can view when submitting the response. When you choose this option, the **Attach File** option will display near the bottom of the window, where you can click Upload to attach a file.

- **Date** - Allows the requester to enter a date as a response to the question.

- **Agree/Disagree** - Presents to requester with the option to agree or disagree as a response.

- **Confirm (Single Checkbox)** - Presents the requester with a text statement and a checkbox that allows them to confirm the text. When you select this option the Checkbox text field will display. You are required to enter text in the text box. The **Attach File** option will also display near the bottom of the window, where you can click Upload to attach a file.

- **Visibility** - This optional field allows you to control the visibility of the field based on information entered in another field. Click Add Conditional Visibility. Locate the appropriate field and click on it, then click the **Next** button. The configured responses for that question will display. Click on the response(s) that should trigger the visibility of the question. When you have completed this click **Save Changes**.

- **Display Order** (required) - Select where the field will fall in display order within the group (options will vary based on the number of questions in the group). **Note:** This is only displayed if there is more than one field.

- **Checkbox Text** - This field is only displayed if you have selected a **Confirm (Single Checkbox)** field type. This is where to enter the text that will be displayed next the checkbox that the user confirms when they select the checkbox.

- **Response is Required** (checkbox) - Click this checkbox to require the requester to enter information in the field.

- **Question Text is Searchable** (checkbox) - Click this checkbox to make the question searchable in document search for requests created from the template. This will also make the template searchable in product search once it is finalized.

- **Send to Supplier** - Click this checkbox to allow this field to be included on PO distribution documents.

- **Field Values** - This field is displayed if you have selected a **Dropdown List** or **Multiple Choice**, or **Multiple Select** field type. This is where to enter the options that are available for the user to select in the dropdown or multiple choice field. Enter a value in the **Option** field, then select **+ Add Option**. Continue this process until you have added all responses. They are listed in reverse order, so add the bottom of the list first. Click the Remove button to delete an option.

- **Attach File** - This field is displayed if you have selected the **File Upload** or **Confirm (Single Checkbox)** field type. Click **Upload** to attach a file to the field.

f. Click **Save Changes**.

g. Once a field is created, these options are available from the drop-down menu next to the field:

- **Edit** - Select to make changes to the field settings.

- **Set Default Value** - Select to display a default response automatically to the end user who is filling out the form. This is useful when you would like to suggest a response or have a common response display by default. A default response can be set as "read only", meaning the end user cannot change the response. If the read only option is not set, end users cannot override the default response when filling out the form.

- **Delete** - Select to remove the field.

Add Invoice Date

The **Invoice Date** field can be added once to a request template.

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, locate the page and group in which you would like to add the Invoice Date field.

d. Within the group, click Add ▾ and select **Add Invoice Date**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The Invoice Date field is immediately displayed in the group.

Add Need By Date

The **Need By Date** field can be added once to a request template.

a. Open a draft copy of the request template you wish to change.

b. Click **Questions** in the left menu.

c. In the right panel, locate the page and group in which you would like to add the question.

d. Within the group, click [Add ▼] and select **Add Need By Date**. If there are multiple groups, be sure you're selecting the Add button for the appropriate group. The Need By Date field is immediately displayed in the group.

Ability to Set Default Responses

Forms administrators have the capability to set default responses for questions or form fields. A default response displays automatically to the end user who is filling out the form. This is useful when you would like to suggest a response or have a common response display by default. A default question or field response can be set as "read only", meaning the end user cannot change the response. If the read only option is not set, end users cannot override the default response when filling out the form.

For most questions, you have the ability to set a default value for the response. This value displays automatically to the user filling out the form. **Note**: There are some fields that do not allow default responses. When this is the case the Set Default Value option is not available.

To set a default response:

a. Add a question or locate one that has been included on the request by default.

b. Click the drop-down arrow on the Edit button next to the question [Edit ▼].

c. Select **Set Default Value**.

d. Enter the default information in the **Default Value** field. The response options vary depending on the question type.

e. To make the response read only, click the **Read Only** checkbox. **Important Note**: Selecting this option means an end user is not able to change it when filling out a form.

f. Click **Save Changes**.

Ability to Provide Instructions within the Question or Field Groups

Form fields and questions are often grouped by similarity. For example, questions related to shipping information may be grouped together within the Form Fields screen. Instructions can be included at the group level through general group setup. However, in some cases it may be necessary to provide instructions at certain points within the group. The Add HTML field allows you to include instructional text within a group of fields or questions. HTML fields are added in the same manner that other fields and questions are added but contain read only information that provides instructions for specific questions/fields within the group.

To add an instructional field to the group:

    a. Add a group or locate one that has been included on the form by default.

    b. Click and select **Add HTML Area**. The **Add HTML** window displays.

    c. In the **Name** field, enter a name for the HTML field.

    d. In the text area, enter the text for the instructions.

    e. Like other form fields and questions, you can configure conditional visibility for the text field and determine it's placement. Configure those settings.

    f. Click **Save Changes**. The field will be added.

Review and Finalize

The **Review and Finalize** section provides a summary of which sections are complete. A table displays with the **Section** name and a **Progress** column. If a section is complete, this will be indicated by a ✔ in the Progress column. If a section is not complete, the **Progress** column indicates this. Actions that need to be completed display in the **Actions Needed on the Following** column. You can click on the action name to access the section and complete the action.

Once all fields are completed, click the **Finalize and Activate Template** button.

> **Important Note:** Once a template is finalized, it cannot be edited or deleted. It can only be viewed, copied or archived.

Managing Request Templates

Overview

Once a request template is created, request templates are saved as user favorites and can then be used by users who have access to the saved favorites.

Additional template tasks may include updating templates by creating new versions, setting a service item default form, importing or exporting templates.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Form Request Workflow

Procurement requests are sent through standard requisition workflow. However, check requests, multi-check requests, quick quote requests and generic requests have a dedicated workflow. Unlike procurement requests, these types of requests are not directly associated with a purchase, therefore they do not need to go through the requisition workflow.

Form Request Workflow will need to be enabled by JAGGAER. Once it has been enabled, you can configure the workflow steps by accessing **Setup** ⚙ **> Workflow Setup > Form Request Workflow Setup**.

Service Item Default Form

Organizations can designate a form or request as the **Service Item Default Form**. The designated form or request opens by default when a service item is selected. Designating a Service Item Default form also causes **Service Item** options to appear throughout eProcurement so that users can easily add the Service Item Default Form to their transactions, similar to the way non-catalog items work.

See Service Item Default Form for more information.

Request Template Versions

When a new request template is **Finalized**, there are essentially two versions of the template; the *Draft* version and *Version 1*. Additional versions of a template can be created by making updates to the Draft version, then Finalizing and Activating it. As new versions are created, the version number increments and the new version automatically becomes the Active version. The new active version is applied anywhere in the application that a template is linked, such as Favorites and shortcuts. The active version can be reverted back to a previous version.

Create a New Request Template

1. Navigate to **Shop** ▢ **> Shopping Settings > Manage Request Templates**. The **Manage Request Templates** screen displays. Choose one:

2. Click **Build a New Request Template** located on the top-right side of the screen. A configuration screen displays.

3. Enter a meaningful name for the template.

4. Select the request purpose in the **Purpose** drop-down field.

5. Click **Submit**.

Edit, Copy or Create a New Version

1. Navigate to **Shop** ▢ **> Shopping Settings > Manage Request Templates**. The **Manage Request Templates** screen displays.

2. Locate the template you want to change in the list. The **Title/Description** search field on the top-left side of the screen allows you to locate a specific template by title or description. You can also filter the lists by the request purpose by selecting an option in the **Request Purpose** drop-down field. The list contains information about the request template including template the request purpose, status and active version.

3. Click on the **Actions** button for the template.

   - To edit a template that has not been finalized, select *Edit*.

   - To create a new version of a finalized template, select *Edit Draft*.

- To copy a template (finalized or not finalized), select *Copy*.

- To simply view a finalized template, select *View*.

- To archive a finalized template, select *Archive*.

Change the Active Version of a Template

1. Navigate to **Shop** **> Shopping Settings > Manage Request Templates**. The **Manage Request Templates** screen displays.

2. Locate the template you want to change in the list. The **Title/Description** search field on the top-left side of the screen allows you to locate a specific template by title or description. You can also filter the lists by the request purpose by selecting an option in the **Request Purpose** drop-down field. The list contains information about the request template including template the request purpose, status and active version.

3. Click on the **Actions** button and select *View*.

4. Click on the **Choose Other Version** link located on the top-right side of the screen.

5. Select the appropriate version. The version displays.

6. Click on the **Review and Finalize** option on the left menu.

7. Click the **Activate Template** button.

Exporting and Importing Request Templates

Organizations have the ability to import and export request templates. The primary reason for this feature is to allow you to create and test request templates in the Test environment and export them to the Production environment, eliminating the need to re-create and re-test them there.

Exports can be done from *Finalized* request templates. Templates can be imported on the main **Manage Request Templates** screen or into a *Draft* request template.

Export a Request Template

1. Navigate to **Shop** **> Shopping Settings > Manage Request Templates**.

2. Locate and open the appropriate form request template.

3. Click on **Template Actions** in the top right corner and select **Export**.

> **Important Note:** Only **Finalized** templates can be exported. This option is not available for templates that are not finalized.

4. A window displays from which you can save or open the export file. If necessary, review the file. Save the file to a location from which it can be selected for import.

Import a Request Template from the Manage Request Templates Page

Importing a request template from the Manage Request Templates page causes a new request template to be created. Templates that are imported are in **Draft** status. The template needs to finalized before it can be used.

1. Navigate to **Shop** ![icon] **> Shopping Settings > Manage Request Templates**.

2. Click the down arrow on the **Build a New Request Template** button (located at the top-right of the screen) and select **Import a Request Template**.

3. Click the **Choose File** button, then browse to and select the file for import.

4. Click the **Import** button. The template is imported. Click **Open Template** to open the imported template.

Import a Request Template from a Template in Draft Status

The Import action is available on request templates in Draft status. Importing a template from an open request template in Draft status will cause the content of the current draft version to be replaced with the content from the imported version.

1. Navigate to **Shop** ![icon] **> Shopping Settings > Manage Request Templates**.

2. Open the **request template** that you want to import into. It must be in Draft status.

3. Locate the **Template Actions** drop-down menu and select **Import**.

4. A confirmation window indicates that the import will replace the content of the current draft version. Click **Yes** to continue.

5. Click the **Choose File** button, then browse to and select the file for import.

6. Click the **Import** button. The template is imported and the content of the current draft version is replaced. Templates that are imported are in **Draft** status. The template needs to be finalized and activated before it can be used.

Service Item Default Form

Overview

Organizations can designate a form or request as the **Service Item Default Form**, and the selected form or request will open by default when a **Service Item** is selected.

Activating a Service Item Default Form makes **Service Item** options appear throughout eProcurement so that users can easily add the Service Item Default Form to their transactions, similar to the way non-catalog items work.

Important! Service Item options are only visible in the application if a Service Item Default Form is selected, otherwise these options are not available.

Related Permissions

The **View/Use Forms** permission (Permission Settings > Shopping, Carts & Requisitions) is needed to designate a form or request as a Service Item Default Form.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Where Service Item Options are Displayed

If a **Service Item Default Form** is enabled for your organization, **Service Item** options appear in the following locations:

- A **Service Item** option can be selected by selecting **Service Item** on the Shop widget.
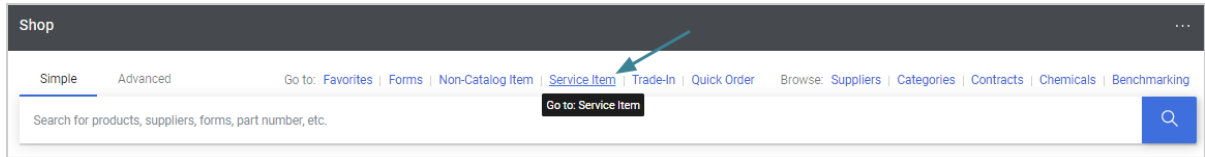
- **Service Item** and **Add Service Item** actions are available on carts, requisitions, purchase orders, invoices and credit memos.
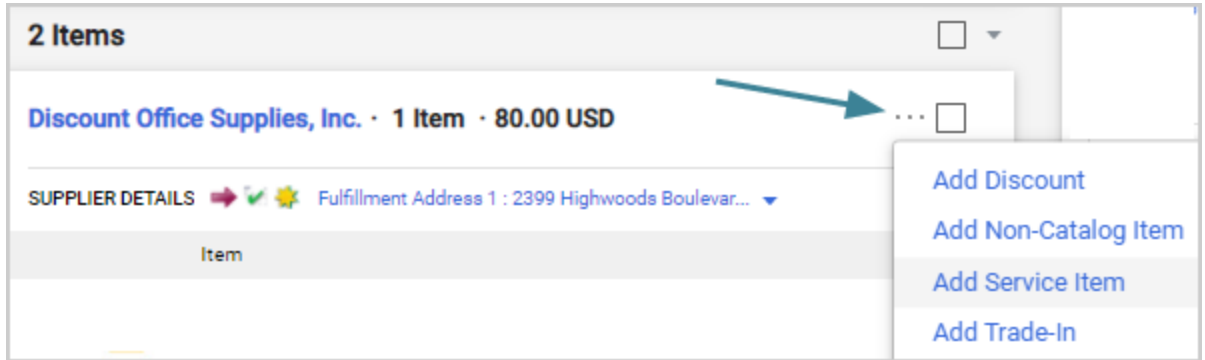
> **Important!** Service item options are only visible in the application if a Service Item Default Form is selected for an organization, otherwise these options are hidden.

Designate a Service Item Default Form

A form or request can be designated as the **Service Item Default Form** as follows.

1. Navigate to **Shop** ▢ **> Shopping Settings** and select **Manage Forms** or **Manage Request Templates**.

2. Locate the **form** or **request** you want to make the Service Item Default Form. It must be an active published version of a form or request (i.e., not in draft status). Only one Service Item Default Form can be selected, which can be either a form *or* a request. The form or request selected as the default can be changed at any time.

   > **Note:** Some form and request settings are not supported when a Service Item Default is selected. These are: Limited Supplier Selection, Fixed Distribution, Template Suppliers, and Currency. These settings will be automatically disabled if a form or request that has them configured is selected as the Service Item Default Form. These fields will also not be available for editing when a draft version of the Service Item Default form is accessed.

3. Click the **Actions** menu next to the form or request and choose **Select as Service Item Default Form**.

4. Click **Yes** in the confirmation window if one is displayed (a confirmation window will be displayed if there is an existing Service Item Default Form). This is now the service form or request that will be selected for service items by default going forward. **Service Item** options are now visible throughout the application.

- On the **Manage Forms** or **Manage Request Templates** page, users will see "CURRENT SERVICE ITEM DEFAULT FORM" on the default form. Organizations can customize this message in field management.

- When editing a form or request, a message near the top of the page indicates that it is the currently assigned Service Item Default Form.

Change a Service Item Default Form

The form or request selected as the Service Item Default Form can be changed at any time.

1. Navigate to **Shop** ▱ **> Shopping Settings** and select **Manage Forms** or **Manage Request Templates**.

2. Locate the **form** or **request** you want to make the new Service Item Default Form. It must be an active published version of a form or request (i.e., not in draft status). Only one Service Item Default Form can be selected, which can be either a form *or* a request.

   > **Note:** Some form and request settings are not supported when a Service Item Default is selected. These are: Limited Supplier Selection, Fixed Distribution, Template Suppliers, and Currency. These settings will be automatically disabled if a form or request that has them configured is selected as the Service Item Default Form. These fields will also not be available for editing when a draft version of the Service Item Default form is accessed.

3. Click the **Actions** menu next to the form or request and choose **Select as Service Item Default Form**.

4. Click **Yes** in the confirmation window.

This is now the service form or request that is selected for service items by default going forward.

Remove a Service Item Default Form

1. Navigate to **Shop** ▱ **> Shopping Settings** and select **Manage Forms** or **Manage Request Templates**.

2. Locate the **form** or **request** that is the Service Item Default Form.

3. Click the **Actions** menu next to the form or request and choose **Remove as Service Item Default Form**.

4. Click **Yes** in the confirmation window.

This disables the feature and Service Item options are no longer displayed in the application.

Service Item Default Forms and Commodity Code Functionality

Service Item Default Forms can be used with the **Select to use Commodity Code Type functionality** organizational setting.

The field regularly works like this:

- The **Line Item Type** field can be enabled for an organization by selecting the **Select to use Commodity Code Type functionality** setting under Setup ⚙ > Hosted Catalog and Ordering Configuration > Category Commodity and UOM Taxonomy Sets (select a taxonomy set and click the Configuration tab).

    - This field designates an item as a product or service item based on commodity code mapping.

    - If an organization has enabled this setting, the **Line Item Type** field is automatically displayed on line items on requisition, purchase order and invoice documents if a commodity code has been populated for the line item.

> **Note:** If the **Line Item Type** field has been added to the document configuration, the field is displayed at all times regardless of this setting.

In addition, if an organization has enabled the setting above *and* they also enable a **Service Item Default Form**, the Line Item Type field values are populated in this order of priority by default:

1. The value manually selected by a user, i.e., "Product" or "Service".

2. The value is automatically populated by selecting a service item form, i.e., "Service".

3. The value is populated by commodity code mapping, if it exists.

> **Note:** The field will be automatically updated if values associated with the field change. For example, if a Line Item Type value is initially "Services", but the commodity code on the line is changed to a code that is mapped to "Products", the Line Item Type will be immediately updated to "Products".

Requisition Document Configuration

On the **Requisition document configuration**, organizations can enable the **One PO per Line Item Type** setting on the **General** tab if they want requisitions to be split into multiple purchase orders based on line item types. If the setting is enabled, separate purchase orders will be created for items with a line item type of **None** or **Products**, and items with a line item type of **Services**. If the setting is not enabled, no split occurs for line item types.

Service Item Workflow

PR, PO, Invoice and Receipt Workflow ADW Line-Level rules display a **Line Item Type** option that can be used to route documents based on their line item type.

Configure Product Search

Overview

One of the primary ways that users locate items for purchase is through the product search feature. These tasks are related to configuring and monitoring product search results:

- Administrators can configure **product search options** to define how items are displayed in the search results.

- Administrators can also **review feedback information**. When shopping in the application, a user may occasionally receive 0 results when searching for an item, and the end-user is given the option to send feedback to an administrator about the empty search results. Administrators can review this feedback to help identify issues that may be causing no results to be returned.

Related Permissions

Permission	Location
System Configuration	Permission Settings > Administration > System Administration
Catalog Management	Permission Settings > Administration > Catalog Administration

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Configure Product Search Results

Administrators can configure **product search options** to define how items are displayed in the search results. For example, they can specify how punch-out suppliers are displayed, what options display in the Refine and Filter section of the Product Search Results, and more.

Product Search Recommendations

- **Create a cheat sheet** - Use the information in this article to create a quick guide for your end users. Make this document available from your Organization Message. Training links from the home page are highly recommended.

- **Train users with examples** - Using your suppliers and the data available to your users, provide real-world search examples in training. Show examples of how using the search criteria fields and basic vs. advanced search make a huge difference in terms of search results.

- **Shared Favorites** - Create Shared Favorites for frequently ordered items or items that are recommended for purchase. For example, if you have a standard item for white 8 X 11 paper, add this to an Office Supplies shared favorite folder for your organization. Users can select this item instead of searching for the "best" item to order. It is also important to educate your users about organization-wide and departmental (shared) favorites during training.

- **Use Searchable Keywords for Suppliers, Forms, and Contracts** - To draw attention to suppliers – hosted or punch-out, use the Searchable Keywords field, which is found in the Supplier Profile to help guide users. For example, if you use a punch-out vendor for computer purchases, allow the user to display in search results and enter different keywords that users would enter (new PC, laptop, computer, desktop, etc.). You can do the same thing for forms (or services) and contracts to highlight items.

- **Work with JAGGAER and your suppliers** - Lastly, if you or your users are struggling understanding the search results that are displayed or "why" you cannot find what you are looking for, contact JAGGAER Customer Support for assistance.

The **System Configuration** permission (**Permission Settings > Administration > System Administration**) is needed to perform this task.

1. Go to **Shop** ▤ **> Shopping Settings > Configure Product Search Results Setting and Filters**.

2. Click the **Product Search Admin** tab.

3. In the **Settings** section, review the current settings and make changes as necessary. To change the current setting, enable the Override Defaults checkbox, then turn on/off the option using the checkboxes on the left. An explanation of each of the fields on the page is provided below.

   - **Show Link on Manufacturer Part Number to perform SKU Search** - This setting will allow users to hover over a manufacturer part number in search results, select the hyperlink, and see results for all products with that manufacturer part number/part number. The user may select to go back to previous results. With this setting off, the user does not have a hyperlink available for the manufacturer part number in search results.

- **Sort multiple promotable custom attributes above a single attribute** - An item can be assigned multiple custom attributes that are set to "promote in product search". Turning this setting on allows the number of promoted attributes to determine the sort order in search results - for example, an item with three boosted attributes will appear before an item with two and an item with two will appear before an item with one.

4. Click **Save**.

5. In the **Virtual Item Settings** section, organizations with Virtual Item Master can drag and drop the options listed to set the priority of the data or price source used to populate values for virtual items in the product search results.

6. In the **Virtual Item Product Details Popup Settings** section, organizations with Virtual Item Master can select the checkbox next to the details they want displayed on virtual items in the product search results and click **Save**.

7. In the **Filter Configuration** section, determine what type of information can be filtered on after a search is performed. The **Refine and Filter** Search box displays after a search is performed, and is located on the left side of the search results. By default, all filter options are displayed. Supplier and Category are required (must be visible). The other options can be made not visible, which means the filter will never display. If the filter type is not applicable to a particular search – for example – if no product flags are available or your organization is not using custom catalog attributes – that section will not display.

   - Disable the **Visible** checkbox if you do not want a section to display. If checked, the filter type will display, if applicable for the search performed.

   - To change the order of the filter options, click on the filter line and drag it to the appropriate area, or use the down and up arrows. This option allows you to determine what filter options are most important to your organization. For example, some organizations feel packaging is key.

8. Click **Save**.

Review End-User Feedback about Empty Product Search Results

When shopping in the application, a user may occasionally receive 0 results when searching for an item. In addition to tips for revising search criteria to get results, the end-user is given the option to send feedback to an administrator about the empty search results. Administrators can review this feedback to help identify issues that may be causing no results to be returned.

The **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) is needed to perform this task.

1. Go to **Shop** **> Shopping Settings > View Products Search Feedback from Users**.

2. Select the **Product Search Feedback** tab.

3. End-user feedback will be visible on the screen.

4. To respond to the user:

   - Select the user's name in the **User Name** column. The user profile will open.

   - Click on the user's email address. A blank email will be created in your default email tool with the user's email in the address line.

5. To export end-user feedback to a .csv file, select the **Export CSV** button above the feedback results.

6. To delete end-user feedback, select the checkbox to the right of the row then select the **Delete selected rows** button above the feedback results.

Manage the Shopping Showcase

Showcase Configuration

On the **Shopping Home** page, organizations can choose to highlight specific suppliers, forms, requests, favorites and more in one or more showcases. Clicking on a sticker in the showcase opens an overlay that displays options for selecting items to purchase.

Administrators can use this feature "direct" their users to key suppliers, hosted catalogs, punch-out catalogs, non-catalog items or forms by providing prime real estate on the Shopping Home page.
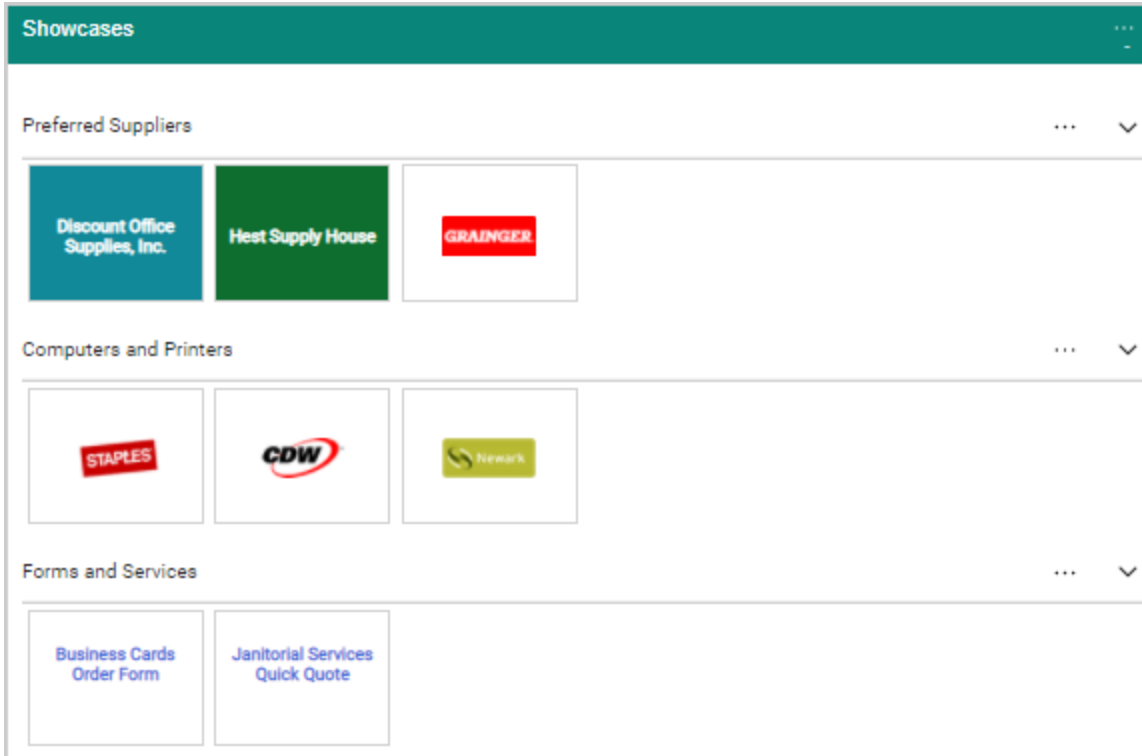
About Showcases

- A site administrator can feature hosted, non-catalog, punch-out, form, and contract suppliers in a shopping showcase.

- A showcase displays on the Shopping Home page once ONE or more stickers are added to it.

- Visibility Options: Suppliers in the purchasing showcase can be emphasized by using a supplier icon OR de-emphasized by using the Supplier Name. Captions can be added below the highlighted suppliers to provide direction or emphasis for a supplier. There are also options for adding color, images and logos to stickers.

- There is no limit to the number of suppliers listed in a showcase; however, JAGGAER best practice is to showcase no more than 20. More than 20 suppliers in the showcase could cause the Home and Product Search pages to load more slowly.

Related Permissions

Permission	Location
Catalog Management	Permission Settings > Administration >Catalog Administration

See for information on eProcurement permissions.

Creating and Managing Showcases

First a showcase is created, stickers are added to it, then it is activated. You can create multiple showcases. Once created, they can be changed, reordered or deleted.

The **Catalog Management** permission (**Permission Settings > Administration >Catalog Administration**) is needed to perform these tasks.

Create a showcase

1. Navigate to **Shop** ▭ **> Shopping Settings > Manage Shopping Showcase**. The **Showcase Management** screen will display a current view of your purchasing showcase.

2. Go to **Configuration Options** on the left and select **Create New Showcase**. The **Create/Edit Showcase** window displays.

3. Enter the **Showcase Name** in the dialog box. The name should reflect the category of suppliers that will appear in that showcase. For example, if you are creating a showcase for suppliers that provide office supplies you may want to name the showcase *Office Supplies*.

4. Click **Save Changes**. The new showcase will be added.

Edit or delete a showcase, or reorder stickers in a showcase

1. Navigate to **Shop** ▭ **> Shopping Settings > Manage Shopping Showcase**. The Showcase Management screen will display a current view of your purchasing showcase. Management options display in the top-right corner of each showcase.

2. Go to the appropriate showcase and choose one of these options:

   - **Edit Showcase** - Click on this option to edit the showcase name.

   - **Delete Showcase** - Click on this option to delete the showcase. **Note:** This will delete all stickers within the showcase.

   - **Reorder Stickers** - This option displays if there are multiple stickers in the showcase. It allows you to change the order of the stickers within the showcase. Click on the option and use the arrows to move the stickers. When you have completed moving stickers click **Save Changes**.

Reorder showcases

You can reorder how the showcases appear on the Shopping Home page by simply dragging and dropping the entire showcase or by following the steps below:

1. Select **Reorder Showcases** from the Configuration Options.

2. Drag the showcases or use the arrows to change the order.

3. Click **Save Changes**.

Activate showcase changes

You can activate showcase changes at any point, however, it is recommended that you have the showcase configured to your specifications before doing so. Activating showcase changes will make them immediately available on the Shopping Home page.

1. Navigate to **Shop** **> Shopping Settings > Manage Shopping Showcase**.

2. Click the **Activate Showcase Changes** button above the Configuration Options.

3. A dialog box will display requesting you confirm that you would like to replace the existing configuration with the new one. Select **OK**. The configuration on the home page will be updated.

Adding Stickers to Showcases

Different types of stickers can be added to showcases.

Create a Supplier sticker

1. Navigate to **Shop** **> Shopping Settings > Manage Shopping Showcase**.

2. Go to Configuration Options on the left and click **Create New Supplier Sticker**. The Create/Edit Showcase Sticker window opens.

3. In the top section complete these fields:

   - **Style** - Select **Multi-Use** for the supplier to be showcased as multiple types (punch-out, hosted, etc.) Select **PunchOut** for the supplier to be showcased as punch-out only.

   - **Supplier** - Click the **Select Supplier** button to search for and select a supplier. Once you select a supplier, if Multi-Use was selected in the Style field, the Available Supplier Showcase Options section is displayed.

4. *For multi-use suppliers only*, in the **Available Supplier Showcase Options** section, select the checkbox next to each item that you want to appear on the supplier sticker in the showcase. Most of the options are hyperlinks that will appear in the sticker.

> **Note:** The options that are displayed depend on the options for which a supplier is configured. For example, suppliers who are not punchout suppliers will not have the **Showcase Punchout** display option. You can view unavailable options by clicking the *Show Unavailable Options* link.

- **Showcase Catalog Search** - Displays a **search field** in the sticker. When users enter a search term, they will be taken to the Search Results page in JAGGAER to view search results.

  > **Note:** If an organization is configured for Amazon Integrated Search and this setting is enabled on the associated Amazon supplier sticker, users will be taken to the External Marketplace Results tab in JAGGAER to view search results.

- **Showcase Specific Items with Organization Attribute** - Displays a **View Showcased Items** link in the sticker. Select an attribute from the drop-down list. When viewers click the link they will be directed to a search page for the supplier's products that contain the selected attribute, i.e., a hot list item.

- **Showcase Browse By Category** -Displays a **Categories** link in the sticker. When users click the link they will be directed to the Category Search page for the supplier.

- **Showcase PunchOut** - Displays a **PunchOut** link in the sticker. When users click the link they will be directed to the supplier's website to place orders.

- **Showcase Non-Catalog** - Displays a **Non-Catalog Item** link in the sticker. When users click the link they will be directed to the Non-Catalog Items window with the supplier selected.

- **Showcase Browse Contracts** - Displays a **Browse Contracts** link in the sticker. When users click the link they will be directed to the Contract Search Results page displaying contracts associated with the supplier.

- **Showcase Form Search** - Displays a **Search Forms** link in the sticker. When users click the link they will be directed to the Search Results page in JAGGAER displaying forms associated with the supplier.

- **Showcase External URL** - Enter a url in the Showcase External URL field to provide link to the supplier's web page outside the application.

5. In the **Sticker Display** section, complete these fields:

- **Supplier Display Format** - Select **Logo** to use the supplier logo for the sticker. Select **Name** to use the supplier name.

- **Background Color** - Enter a hexadecimal color number in the field (beginning with #), or click the **select color...** link to make a color selection and click **Submit**.

- **Background Image** - Click the **select image....** link to choose the image that will appear as the background image for the sticker. This must be an Supplier Showcase/PunchOut Background image that has been uploaded to your system in image management (Setup > General Site Settings > Manage Organization Images). You can click the image management tab to add an image.

- **Text Color** - Select an option from the drop down menu. There are three choices: White, Black, or Link. Link refers to the color designated for linked text in the color theme used by the organization.

- **Sticker Logo** - This field is displayed if you selected Logo in the Supplier Display Format field. The logo configured in the supplier's profile will be used automatically. If there is no logo configured, or you would like to change the default logo, click the **select image...** link and choose a new image.

> **Note:** For information about adding a logo to the Supplier Profile please see **Configuring Supplier Profile Showcase/Punchout Settings**.

- **Caption** - Add a caption for the sticker. Maximum is 30 characters.

- **Showcase** - Select the showcase in which the sticker should display.

6. Click **Save Changes**.

Create a Form sticker

1. Navigate to **Shop [icon] > Shopping Settings > Manage Shopping Showcase**.

2. Go to Configuration Options on the left and click **Create New Form Sticker**. The Create/Edit Showcase Sticker window opens.

3. In the top section complete these fields:

- Form - Click the **Select Form** button. Browse to the appropriate folder and locate the form. **Note:** Only forms available to the user will be displayed and selectable.

4. In the **Sticker Display** section, complete these fields:

- **Display Format** - Select **Logo** to use a logo for the sticker. Select **Name** to use the form name.

- **Background Color** - Enter a hexadecimal color number in the field (beginning with #), or click the **select color...** link to make a color selection and click **Submit**.

- **Background Image** - Click the **select image....** link to choose the image that will appear as the background image for the sticker. This must be an Supplier Showcase/PunchOut Background image that has been uploaded to your system in image management (Setup > General Site Settings > Manage Organization Images). You can click the image management tab to add an image.

- **Text Color** - Select an option from the drop down menu. There are three choices: White, Black, or Link. Link refers to the color designated for linked text in the color theme used by the organization.

- **Sticker Logo** - This field is displayed if you selected Logo in the Display Format field. Click the **select image...** link and choose an image.

- **Caption** - Add a caption for the sticker. Maximum is 30 characters.

- **Showcase** - Select the showcase in which the sticker should display.

5. Click **Save Changes**.

Create a Form Request sticker

1. Navigate to **Shop** ▣ **> Shopping Settings > Manage Shopping Showcase**.

2. Go to Configuration Options on the left and click **Create New Form Request Sticker**. The Create/Edit Showcase Sticker window opens.

3. In the top section complete this field:

- **Form Request** - Click the **Select Form Request** button. Browse to the appropriate folder and locate the form. **Note:** Only forms available to the user will be displayed and selectable.

4. In the **Sticker Display** section, complete these fields:

- **Display Format** - Select **Logo** to use the logo for the sticker. Select **Name** to use the form request name.

- **Background Color** - Enter a hexadecimal color number in the field (beginning with #), or click the **select color...** link to make a color selection and click **Submit**.

- **Background Image** - Click the **select image....** link to choose the image that will appear as the background image for the sticker. This must be an Supplier Showcase/PunchOut Background image that has been uploaded to your system in image management (Setup > General Site Settings > Manage Organization Images). You can click the image management tab to add an image.

- **Text Color** - Select an option from the drop down menu. There are three choices: White, Black, or Link. Link refers to the color designated for linked text in the color theme used by the organization.

- **Sticker Logo** - This field is displayed if you selected Logo in the Display Format field. Click the **select image...** link and choose an image.

- **Caption** - Add a caption for the sticker. Maximum is 30 characters.

- **Showcase** - Select the showcase in which the sticker should display.

5. Click **Save Changes**.

Create a Favorites sticker

1. Navigate to **Shop** 🖼 **> Shopping Settings > Manage Shopping Showcase**.

2. Go to **Configuration Options** on the left and click **Create New Favorites Sticker**. The Create/Edit Showcase Sticker window opens.

3. Complete these fields:

   - **Select Folder** Click the **Select Folder** button. Browse to locate and select the appropriate folder. **Note:** Only shared folders are selectable.

   - **Caption** - Add a caption for the sticker. Maximum is 30 characters.

   - **Showcase** - Select the showcase in which the sticker should display.

4. Click **Save Changes**.

Editing or Deleting Stickers in Showcases

Stickers can be changed or deleted from showcases.

Edit sticker settings

1. Navigate to **Shop** 🖬 **> Shopping Settings > Manage Shopping Showcase**.

2. Go to the sticker on the showcase and click the Edit 🖍 icon on the sticker.

3. Change settings and click **Save Changes**.

Delete a sticker from a showcase

1. Navigate to **Shop** 🖬 **> Shopping Settings > Manage Shopping Showcase**.

2. Go to the sticker on the showcase and click the Delete ⊗ icon on the sticker.

3. Click **Yes** in the confirmation window.

Setup and Administration

General Setup Tasks

Address Management

Overview

Ship To addresses identify where the supplier should ship item. **Bill To** addresses identify where the supplier should send the bill for the items. These addresses are configured on the organization level, then an address can be assigned to be the default for specific users. This can help reduce data entry for users and ensure that standard addresses are used.

If your organization uses the Multiple Business Unit feature, you can assign addresses to a specific BU, meaning only users within the specified business units will have access to the address.

Note: These tasks focus on address setup on the organization and business unit level. For information about managing the default addresses for specific users, please see the section below or "Default Addresses " in the **Site Essentials Handbook** or online searchable help.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Permission	Location
Address Management	Permission Settings > Administration > System Administration

Set Up Organization Bill To and Ship To Addresses

Bill To and Ship To addresses can be set up at the organization level. When addresses are configured, they are automatically selectable in the Bill To and Ship To addresses at checkout.

The **Address Management** permission (Permission Settings > Administration > System Administration) is needed to perform this task.

1. Go to **Setup** ⚙ **> Organization Structure and Settings > Manage Default Addresses**. The Address Management screen will display with the **Ship To** tab active. Click on the **Bill To** tab to create or configure a Bill-to address. **Note:** Bill To and Ship To addresses are set up identically. You can follow these steps to create either type of address.

2. If there are any existing addresses, they will display in the address list on the left. To work with an existing address, click the address name. To create a new address click the **Create New Address** button. The **Edit Selected Address** window displays.

3. Configure or edit the primary address information.

   - **NickName (required)** - The name of the address as it displays in the application. For example, **North Carolina Office**.

   - **Address Code** - Enter a code that can be sent to suppliers. They can use this code to map the full address in their internal systems.

   - **Assigned Business Unit** - Begin typing a business unit or click 📇 to view and select from a list of available business units. You can choose one or more business units to assign to the address. For additional information about business unit - address relationships, please see "The User Profile" in the online searchable help.

   - **Active** - Select the checkbox to make the address active. **Note:** It's best to complete configuration before activating an address.

   - **Use Bill To Logo as Fax Letterhead** (Bill To addresses only) - Select the checkbox if you want the logo on PO faxes to be displayed based on a company's Bill To address. Click the **Select** button and choose one of these options:

     - **Select An Image...** - Allows you to select an image that has already been uploaded in to your site. When you choose this option the Image Selector window displays. Search for and click on the appropriate image. The image you clicked on will display on the bottom.

     - **Upload An Image...** - Allows you to upload and select a new image for the logo. When you choose this option the Image Management window displays. Follow the steps below to upload a new image.

     - **Do Not Use An Image** - Choose this option to delete an image that has been configured for the logo type. Reminder: If an image is not configured for fax, mobile or email type, the logo defaults to the image from the banner logo setting.

4. Click on the **Master Template** tab. The available address fields are determined by the master template. Although the master template is not editable, you can choose the number of contact and address lines for addresses you are creating. If you would like to make changes to the template, please contact JAGGAER.

5. Configure the address fields. Select the field type for each field and enter any additional information that is required. Available field types include:

   - **Do Not Display** - Select this option if you do not want the field to be displayed for the address. You might choose this option if there are multiple contact lines and you do not need to use all of them. Note: If a field is marked as required in the master template, this option is not available.

   - **Admin Controlled** - Select this option to make the field display label and value admin controlled, meaning a user cannot change the label or value.

   - **User Required** - Selecting this option makes the field a required field but allows the user to enter the value. The user will also be able to change the display label for contact lines.

   - **User Optional** - Selecting this option marks the field as an optional field. The user is able to enter the value and change the display label for contact lines.

6. A preview of the address displays below the fields. Click **Update Preview** to refresh the preview to reflect your changes as you make them.

7. Click **Save**. If you did not activate the address previously, be sure to click the **Active** checkbox in the general address information.

Assign Business Units to an Address

The application allows organizations to assign business units to a Ship To or Bill To address. When you assign business units to an address only users within the business unit are able to use the address.

You must have the **Address Management** permission (**Permission Settings > Administration > System Administration**) to perform this task.

1. Navigate to **Setup** ⚙ **> Organization Structure and Settings > Manage Default Addresses**. The Address Management screen will display with the **Ship To** tab active. Click on the **Bill To** tab if you would like to assign this the business unit to a Bill To address.

2. Locate the appropriate address in the address list and click on the name. The **Edit Selected Address** window displays.

3. Locate the **Assigned Business Unit** field. Begin typing a business unit or click ▤ to view and select from a list of available business units. You can choose one or more business units to assign to the address.

4. Click **Save**.

Assign Default Addresses to a User Profile

While address information can be entered each time an order is placed, it is recommended to set up billing and shipping information in the user profile to save time and provide consistency with each order. There are two types of addresses that are user-defined for purchase orders:

- **Ship To** - The shipping address identifies where the supplier should ship the item(s).

- **Bill To** - The billing address identifies where the supplier should send the bill for the item (s).

It is recommended that one **Bill To** and one **Ship To** address is marked as the default address.

Add Default Addresses to a User Profile

1. Navigate to **Administer** 🖼 **> Manage Users > Search for Users** and open the profile of the user you want to assign default addresses to.

2. In the left menu, select **Default User Settings**, then **Default Addresses**.

3. In the right panel, select the **Ship To** or **Bill To** tab.

4. Choose one:

   - *Select organization's default address* - Click the appropriate **organization default address** listed under the **Shipping Addresses** or **Billing Addresses** sub-heading. The address information populates on the right. Ensure the **Default** checkbox is selected.

   - *Select a different address template to use as default*

     a. Click the **Select Addresses for Profile** button. Search for and select the appropriate address template.

     b. The address information displays. **Nickname** and **Attn (Contact Line 1)** fields are editable. Review the address information and make any appropriate

edits. To make this the default user address, select the **Default** checkbox.

5. Click **Save**.

6. Repeat the steps to add any additional shipping or billing addresses to the profile.

Approval Notification Setup

Overview

Approval Notifications via Email or Application

Approvers can be notified of a requisition or purchase order requiring attention via email or an application notification. Receiving notifications is optional, but is highly recommended. In order to receive notifications, the appropriate preferences must be enabled. These notifications can be enabled at the role level by a user administrator, or for individual users.

An organization can also allow some approvers to approve a requisition or purchase order via email, without having to log into the application. See "Email Approval" on page 257 for more information.

The application stores a history of all workflow notifications. This history is simply a list of all the workflow notifications located in a single tab in the approvals section. From this tab, you can view the notification and link to the associated document.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Option 1: Basic Notification / Email

By default, the basic notification is sent to approvers with the email notification enabled. This notification lets the user know that an order requiring their attention is in the queue. A link that takes the user directly to the order requiring attention is also available. An example of this email is provided below:

```
-----Original Message-----
From: support@sciquest.com [mailto:support@sciquest.com]
Sent: Wednesday, June 22, 2011 2:09 PM
To: Robin Dunaway
Subject: New Pending Approval for Requisition#: 269168

Re: YOUR APPROVAL IS PENDING FOR REQUISITION#: 269168 Cart Name: 2011-06-22 ssunshine 01 Prepared by: Sara
Sunshine
Folder: Department: Chemistry: (All Values)

Dear Abby Anderson,

The requisition listed above has been submitted for your approval and is located in the folder listed.  If the
folder is a shared folder, the requisition must first be assigned to your personal folder before approving.  The
requisition can be accessed for review in "My Approvals" or by selecting the URL below.

https://daffy.sciquest.com/apps/Router/ReqApprovalFolders?AuthUser=112460&tmstmp=1308766140423



If you have any questions with regard to reviewing/approving this requisition, please contact your SelectSite
Support Team.

Support Team Contact Information:
+1 (919) 555-5555
Support@DNTech.com

Thank you,
DN Technologies
```

Option 2: Notification / Email with Order Data

A more advanced notification is also available that provides order data within the email. Some of the information in the notification includes the requester name, the line item information, the total dollar amount, accounting codes charged, and more. The user can then click the login link, access the site and approve or reject the order. This option allows the organization to share detailed order information quickly and easily, while still requiring approvers to take action in their site.

NOTE: This option can be used in conjunction with Option 3, below. For example, you may want all approvers to view the email with order data, but only allow a sub-set to approve/reject directly from the email.

This is an administrative setting and is enabled at the organization level for all approvers (i.e., not a role or user setting). To enable this option, go to **Setup > Workflow Setup > General Workflow Settings**, and navigate to the **Workflow Options** section. Enable the **Send detailed information in Pending Approval notifications (all approvers)** checkbox. All users who have approval notification preferences enabled will receive the enhanced email. However, unless the configurations are enabled to allow approval via the notification, the user will be required to log into the application to approve the document.

An example of the notification is provided below:

Key information about the requisition (or purchase order), including user, total dollar amount, and the start of line item details.

From: support@sciquest.com [mailto:support@sciquest.com]
Sent: Wednesday, June 22, 2011 2:07 PM
To: Robin Dunaway
Subject: New Pending Approval for Requisition# 269143

Approval Request for Requisition# 269143

Dear Abby Anderson,

The requisition listed below has been submitted for your approval.

Summary

Folder:	Department: Chemistry: (All Values)
Prepared by:	Sara Sunshine
Cart Name:	2011-06-22 ssunshine 01
Requisition No.:	269143
Priority:	Normal
No. of line items:	3
TOTAL:	**315.89 USD**

Details

Bioptechs, Inc.

Item 1

Description:	Microscope Objective Wrench & Pliers
Catalog Number:	021523
Quantity:	5
Unit Price:	49.99 USD
Ext. Price:	249.95 USD
Size/Packaging:	EA
Taxable:	Yes
Capital Expense:	No
Commodity Code:	002

LABREPCO Inc.

Item 3

Description:	Nikon TE200DIC Microscope (Hg)
Catalog Number:	21400DIC
Quantity:	3
Unit Price:	10.99 USD
Ext. Price:	32.97 USD
Size/Packaging:	1/EA
Taxable:	Yes
Capital Expense:	No
Commodity Code:	002
TOTAL:	**315.89 USD**

Additional Information

Summary Details
Comments: (0)

Other Possible Approvers
Ryan Nolan

Shipping Address
Sara Sunshine
24500 Sunny Blvd
San Diego, CA 92101
United States

Click here to view the document in your organization's site.

If you have any questions with regard to reviewing/approving this requisition, please contact your SelectSite Support Team.

Support Team Contact Information:
+1 (919) 555-5555
Support@DNTech.com

Thank you,
DN Technologies

Additional information such as shipping, and the link to access the PR or PO for full review in the application.

Option 3: Email with Order Data AND the Ability to Approve/Reject

A final email option is available that not only allows the user to view important order data, as described in Option 2, but also allows the user to approve or reject the requisition or order directly from the email – without logging into the system.

This option is especially helpful for those who log into the system infrequently or are viewing emails via mobile devices. Approvers will continue to have the ability to take action in the

application; however, this option allows approvers to also take action from their desktop email, or on many mobile devices without having to access the application, potentially decreasing the length of the procure-to-order process.

To take advantage of email approvals, there are several settings that must be configured by an administrator. For additional information about configuring the organization to utilize email approvals, see "Workflow Email Approval Configuration" in the online searchable help. Additionally, the approver must have one of the following permissions enabled: **Approve/Reject Requisitions via email** and/or **Approve/Reject Purchase Orders via email** to receive the respective email, and must also have an approval code configured. See Email Approval.

Option for Organizations using an External Login Method and Email Approvals

For those organizations using email approval and an external login method, an option is available that assists with the login process. Approvers will be directed to a specific screen (from a notification) after they are authenticated by the external system. For example, if an approver receives an email about a pending order to approve (and they are not currently logged in the system), clicking the link in the email will redirect them to their login page. If they successfully login within two minutes, they will be directed to the specific document referenced in the notification. To enable this feature, a setting must be turned OFF: **Setup > General Site Settings > System Settings and Configuration > System Configuration > Email Settings section: Exclude URL links in Document-based Emails**.

Financial Approval Setup

Overview

Requisition and Purchase Order Financial Approval

Financial approvals allow organizations to trigger approvals based on a user's financial limits. If this type of workflow approval is used by an organization, it is typically the first manual approval step in the workflow process. This means that outside of auto-rejections and other system validations, a user's financial approver is the first person to review and approve or reject the line items in the requisition.

Financial approvals can also be configured for invoices. See "Invoice Workflow and Approval" in the **Invoicing Handbook** or online searchable help for more information.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for more information about eProcurement permissions.

How Financial Approval Works

Financial Approval is required when a user submits a requisition or purchase order that is above their allowed limit, in which case, approval is required by a specified approver. For example, David

Jones is assigned the Requester role with a requisition limit of $400. He submits a requisition for $45 which does not require Financial Approval. He submits a second requisition for $600, and Financial Approval is required.

Setup for Financial Approvals

The financial approval step in workflow must be set up by JAGGAER. There are two other tasks related to using financial approvals:

To use requisition or purchase order limits in the workflow process, contact JAGGAER to include the Financial Approval step in the appropriate workflow(s). Also, the users who will be submitting requisitions and purchase orders must have limits and financial approvers set up in their user profile.

1. **Assigning purchasing limits to users**. These limits determine when a user requires financial approval. These limits are set on the user's profile or at the role level under **Ordering and Approval Settings > User Purchasing and Approval Limit Values**. The limits that can be set are:

   - **Requisition Limit** - Financial limit for the total requisition value. If the total requisition amount exceeds this limit, financial approval will be required.

   - **Requisition Line Item Limit** - Financial limit for individual line items in a requisition. If any one line item exceeds this limit, financial approval will be required.

   - **Requisition Approval Limit** - Financial limit for an approver's *approval* limit. If a requisition total amount exceeds this amount for an approver, an additional financial approval step will be required.

   - **Requisition Line Item Approval Limit** - Financial limit for an approver's line item *approval* limit. If any line items in a requisition exceed this amount for an approver, an additional financial approval step will be required.

   - **Purchase Order Limit** - Financial limit for the total purchase order value. If the total purchase order amount exceeds this limit, financial approval will be required.

   - **Purchase Order Line Item Limit** - Financial limit for individual line items in a purchase order. If any one line item exceeds this limit, financial approval will be required.

   - **Purchase Order Approval Limit** - Financial limit for an approver's *approval* limit. If a purchase order total amount exceeds this amount for an approver, an additional financial approval step will be required.

   - **Purchase Order Line Item Approval Limit** - Financial limit for an approver's line item *approval* limit. If any line items in a purchase order exceed this amount for an approver, an additional financial approval step will be required.

- **Limited Purchase Order Limit** - Financial limit associated with the LPO routing approval step. Any purchase order exceeding this limit will have to be processed through the LPO folder.

- **Line Item Limited Purchase Order Limit** - Financial limit associated with the LPO routing approval step. Any line item in a purchase order exceeding this limit will have to be processed through the LPO folder.

2. **Assigning Financial Approvers for each user**. Some organizations assign approvers to each of its users and others allow their users to determine who can approve their orders. Each user can have one or more financial approver assigned. The Financial Approvers are configured on the user's profile under **Default User Settings > Financial Approvers**.

For information about setting financial approval limits for a user, please see "Financial Approvers " in the **Site Essentials Handbook** or online searchable help.

Price File Management

Overview

Pricing for hosted catalog items can be determined by several factors. Many suppliers have negotiated discount pricing with organizations while others have consistent list prices with all organizations. In some cases, pricing is determined by an organization's membership in a consortium or by an associated contract. Hosted catalog items are submitted by suppliers (or JAGGAER Support) with associated pricing that reflects the agreement between the organization and the supplier. Organizations must review and approve the price files before the items and pricing to be accessible in the hosted catalog. This is referred to as **Price File Management**.

Organizations may choose to require price file approval before price set versions are loaded into the customer system. The organization default is to require price approval before loading, which can be overridden at the supplier level. Some organizations may not require price file approval. Please contact your system administrator to determine if price file approval is required by your company.

Related Permissions

- **System Configuration** - (Permission Settings > Administration > System Administration). This permission needed to configure price file options. Users with this permission can access and edit system configuration settings, including security and session settings, language support, automatic job generation (replenishment), and system color settings.

- **Approve All Supplier Price Files** -(Permission Settings > Administration > Catalog Administration). This permission is needed to configure science catalog settings or to view, request, approve, reject price file extracts, or to assign a contract to a price file extract . Users with this permission can all price files that come to the organization for review. The user will receive email notifications for all price files for the supplier (if email preference enabled).

- **Approve Assigned Supplier Price Files** - (Permission Settings > Administration > Catalog Administration). This permission is needed to configure science catalog settings or to view, request, approve, reject price file extracts, or to assign a contract to a price file extract for the specific suppliers to which they are assigned. Users with this permission can approve the price files for specific suppliers to which the user has been assigned.

See for information on eProcurement permissions.

Configuring Price File Options

There are a number of configuration options related to price file management. These options are typically determined during implementation and only require updating on an as-needed basis.

System Settings

You must have the **System Configuration** permission (**Permission Settings > Administration > System Administration**) to perform this task.

1. Go to **Setup** ⚙ **> General Site Settings > System Settings and Configuration**.

2. Expand the **Misc. Settings** section of the screen.

3. Select the edit button and configure the options related to price files. For additional information about each field, mouse over the field name or click the **?** to access field help.

   - **Maximum lines per price file export**

   - **Default number of previous months transaction history to include in price file extract**

   - **Applicable transaction data for price extracts**

   - **Price files must be approved before loading**

   - **Price files can be approved by Contract Manager**

4. The following options are managed by JAGGAER and cannot be edited, but are displayed for informational purposes:

- **Corporate list price enabled**

- **Higher ed list price enabled**

5. Click **Save**.

Science Catalog Settings

Additional settings are available if your organization utilizes the Science Catalog.

You must have the **Approve All Supplier Price Files** or **Approve Assigned Supplier Price Files** permission to perform this task. These permissions are located in **Permission Settings > Administration > Catalog Administration**.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Hosted Catalog Price Sets** and select the **Science Catalog** tab.

2. Click the **Override Default Values** checkbox for the **Use List Pricing** field. Select one of the following options from the drop-down field.

- **Yes** indicates the system always considers list pricing when displaying price in **Search Results** and **Favorites**. These areas of the application always show the lowest price available to the end-user. For customers using the contract compliance feature, this setting displays the lowest list price in the pricing pop-up. The lower of corporate and higher ed (where available) list pricing is shown.

- **No** indicates the system never considers list pricing. This option is used to turn off all non-contract items within the supplier's catalog.

- **Only if no other prices are available** indicates the system considers list pricing only when private, contract, and consortium pricing are not available for the item. This option is used to control the system when a subset of products offered by a supplier is under contract (private pricing) or consortium pricing, and all products are to be made available to the end user. List pricing is not considered in calculating the lowest price to be shown to the user when a contract (private price) or consortium price is available.

3. Click **Save**.

Override settings on the supplier level

1. Open the supplier profile. Expand the **eProcurement** section and click on the **Price Config/List Price** page.

2. Configure the settings:

   - **Require price file approval (Does not apply to List pricing)**: The default organization setting is displayed. To override for the specific supplier, select to Override Default Values and enable or disable the setting, as appropriate. When enabled (by default or only for the supplier), price files must be approved before they are active for end users in the application.

   - **Use List Pricing** option can be overridden by supplier. Whenever the setting is overridden, regardless of the setting on the **Science Catalog** tab of the **Pricing** menu, the overridden value is applied to the supplier. The options here are identical to those on the **Science Catalog** tab however; they only apply to the supplier.

   - **Member of Science Catalog** is a JAGGAER managed attribute, i.e., it is a read-only value. Science Catalog suppliers have this enabled.

3. Click **Save**.

Requesting Price File Extracts

Although it is not required, it is a good idea to extract and review price files before approving them. Price sets can be extracted, along with consortium pricing and list pricing. Price set versions can be viewed individually or comparatively to another price set version. Price files are extracted as .txt files by default.

You must have the appropriate permission to perform this task. Users with the **Approve All Supplier Price Files** permission can view all supplier price files. Users with the **Approve Assigned Supplier Price Files** permission can view price files for the specific suppliers to which they are assigned. These permissions are located in **Permission Settings > Administration > Catalog Administration**.

1. Go to the **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Hosted Catalog Price Sets**. The **Price Sets** tab displays.

2. By default, the screen displays all price sets that have not been approved or rejected. You can change the filter settings by expanding the **Click for Price Set Search** button. Price sets can be filtered on *Supplier Name/ID, Price Set Type* and *Price Set Version Status*. For additional information about the filter options, mouse over each field name or click on the **?** in the top right corner of the filter area to access field help. Filter the price sets and the list

displays.

3. Locate the price file you would like to extract. Select the **Extract** option:

- **Single** - This option extracts only the selected price set version.

- **Comparison** - This option allows you to extract the selected price set version plus a different version of the price set for comparison purposes. The option is only available if there are multiple versions of the price set. When you select this option, an overlay displays the other versions of the price set. Click the version for comparison.

4. The **Extract Request Confirmation** overlay displays. Enter information in the fields:

- **Extract Type** - This field determines the information that will be included in the extract. For example, the *Prices* option extracts only basic item information along with the prices. The *Content* option extracts more detailed information along with the prices. Additional information about each extract type can be found in the field help by clicking on the ? on the overlay.

- **Select months for transaction summary history** - This determines the time period for transaction summary history in the price review file. The value defaults to 6 month. You can select a different month span or there is a YTD option, which will return a summary history from the current year-to-date.

- Click **Request Data Extract**.

5. To retrieve the extract, click on the **Price File Review** tab. Locate the appropriate extract. If the extract is still pending, refresh the screen until the status is **Completed**.

6. Click on the **Download File** link to open or save the file. Best practice is to save the file and then open the file in Excel or a spreadsheet program, taking care that the format of the part number field is "text" so that leading zero's do not get dropped. Review the price file. See below for information about the fields in the extracted price file.

Fields in the extracted price file

- **JAGGAER Supplier ID** - The ID assigned to the supplier by JAGGAER. **Note**: This field will only be included if the organization is configured to display the ID. If it is not displaying you can contact JAGGAER to have the setting enabled that will allow the ID to display.

- **Supplier Number** - This is the number assigned to the supplier by the organization. If no number has been assigned then no value will display.

- **Part Number**

- **Product Description**

- **Product Size**

- **Packaging UOM**

- **Price** - In the Single Price File Extract, the organization price provided in the selected version. This field shows as "New Price" in the Comparison Extract.

- **New Price** - This is the price in the pending price file for review, and is in the Comparison Price File Extract only.

- **New Price Date** - This is the date the new price was uploaded for approval, and is in the Comparison Price File Extract only.

- **Prices Available Beginning** - This is the date assigned by the supplier when submitting the price file. This will appear for the most recent price set version being viewed or compared.

- **List Price** - The supplier's list price for the item.

- **List Price Date** - The date the supplier's list price was updated.

- **List vs. Price % Change** - This is the percentage difference between the Price and List Price fields, and is in the Single Price File Extract format.

- **Old Price** - The old price (in the previous version being compared) for the item for your organization.

- **Old Price Date** - The date that the old price was made effective.

- **List vs. New % Change** - The percentage difference between the list price and the new price.

- **Old vs. New % Change** - The percentage difference between the old price and the new price.

- **Old/New % Range** - The range of percentage difference between old and new price. The ranges are: **0% to 5%**, **5% to 10%**, and **over 10%.**This information may be useful when filter or sorting the price file information, to easily see all items within a certain range.

- **Type of Change** - The type of change between the two prices you are comparing. Values are: **New Price**, **Price Decrease**, **Price Increase**, **Price Removed**, and **Call for Price**. You may want to filter or sort the information in the file by these values, along with the **Old/New**

% Range. For example, you may want to see all **Price Increases** that are **over 10%**.

- **X Month Quantity Ordered** - Depending on the selection you made for the number of months you selected when requesting the extract, you will see the quantity of the item ordered (requisitions or purchase orders) during that time.

- **Average Price per Quantity** - The average price paid for the item over the previous X months (the number of months selected to be included in the extract).

- **Total Estimated Impact** - Estimated percentage impact of the new price based on purchase history. A value exists only for items with new or updated pricing that have been purchased over the selected number of months.

- **Product visible** - This column will contain a value of True or False, indicating if this product is visible to the organization. If the value is False, the Reason not visible will be listed.

- **Reason not visible** - Reasons a product may not be visible to an organization.

- **Included in Product Views** - The product views in which the item is available.

- **Manufacturer Name** - The manufacturer name for the item, if provided by the supplier.

- **Manufacturer Part Number** - The manufacturer part number for the item, if provided by the supplier.

- **Category** - The item's category.

- **Category UNSPSC** - In the Single Price File Extract format, the category's UNSPSC code.

- **UNSPSC** - The UNSPSC code corresponding to the item's category.

- **Commodity Code** - The Commodity Code for the item, based on your organization's commodity code/category mappings.

Approve, Reject or Assign a Contract to a Price File

You must have the appropriate permission to perform this task. Users with the **Approve All Supplier Price Files** permission can approve all supplier price files. Users with the **Approve Assigned Supplier Price Files** permission can approve price files for the specific suppliers to which they are assigned. These permissions are located in **Permission Settings > Administration > Catalog Administration**.

1. Go to the **Setup** ⬚ **> Hosted Catalog and Ordering Configuration > Hosted Catalog Price Sets**. The **Price Sets** tab displays.

2. By default, the screen displays all price sets that have not been approved or rejected. You can change the filter settings by expanding the **Click for Price Set Search** button. Price sets can be filtered on *Supplier Name/ID, Price Set Type* and *Price Set Version Status*. For additional information about the filter options, mouse over each field name or click on the **?** in the top right corner of the filter area to access field help. Filter the price sets and the list displays.

3. If there are multiple versions of a price set, they display in reverse chronological order. Only versions from the current active version to the most recent version are shown in the UI. To see versions prior to the current active version, select the **[Version History]** hyperlink next to the Price Set name. The status of each version displays below the version number. No actions can be performed on price set versions older than the current active version.

4. Take action on the price set:

Assign a Contract to a Price File

You can associate a contract with a price file directly from the **Price Set** screen.

1. Locate the **Assign** button. Click the button to assign an existing contract. If no contracts exist that can be assigned to the price set, a message stating this displays.
2. Select the appropriate contract.
3. To create a new contract to associate with the price set, click the ▾ on the Assign button and follow the steps to create a new contract.

Approve a Price File

1. Click the associated **Approve** button. The **Pricing File Approval Confirmation Page** displays.
2. If necessary, enter comments in the **Reviewer Comments** field.
3. The **Effective Date** field defaults to the current date but can be modified. Note: When suppliers submit price files, they may designate an "price available" date. When this is the case, the pricing will not be updated until the price available date, regardless of the effective date entered here.
4. Click the **Approve** button.
5. Once a price file has been approved, the effective date can be changed for price sets with a future effective date. To perform this action, select the **Change Effective Date** button and repeat the steps above. Approved pricing and catalog data are available on the site in approximately two hours.

Reject a Price File

1. Click the associated **Reject** button. The **Pricing File Reject Confirmation Page** displays.
2. If necessary, enter comments in the **Reviewer Comments** field.
3. Click the **Reject** button.

Note: Partially rejected price files are not supported; only approving or rejecting files in their entirety. If an administrator sees a problem with a particular price file's data, JAGGAER suggests rejecting the file and contacting the supplier to correct the issue.

Promotional Price Sets

Suppliers have the ability to provide promotional pricing that has a specific beginning and end date to allow customers the opportunity to take advantage of special deals and pricing. Price set versions that are flagged by the supplier as Promotional Pricing are auto-approved and activated into the customer's system. This allows the customer to begin taking advantage of promotional pricing immediately upon the effective date, and to eliminate repeated manual steps of price file approval. At the end of the promotional period, the most recent approved price set will go into effect.

When a supplier provides a promotional price file, the following validation is applied before prices are auto-approved to the buyer system:

- A promotional price file can only be uploaded/applied if there is an existing, active price file.

- Prices in the promotional file must be lower than the existing prices for corresponding items in the baseline price set. Prices that are lower than the existing price will be applied; prices that are higher will remain unchanged and not be indicated as promotional.

- Promotional prices will not replace a "Call for Price" indication for items, and the file cannot contain "Call for Price" items.

Buyer organizations can reject the promotional price sets at any time. Users with the **New Price File pending review** notification enabled will receive an email and/or in-app notification that a new price file was submitted and automatically approved.

When the promotional period ends, or if the promotional price set is rejected, the price set that was active prior to the promotional period is automatically reinstated.

Reviewing a Promotional Price Set

Administrators can access the price set to extract the promotional price set for review, or Reject the price file:

- When viewing information about a price set, an indication for **Is Promotional Price?** will indicate **Yes**, along with an indication if it is **Expired** or has been **Auto Approved**, if applicable.

- The date range indicated for a promotional price set is "thru" and not "to". This means if the promotion begin and end dates are the same, the promotional prices will be in effect for a maximum of up to 24 hours, depending on the time it was syndicated into the system. The beginning date starts at 12:00:00am, and ending date takes effect at 11:59:59pm.

Class and Product View Management

Overview

Supplier Classes, Category Classes, and Product Views can be used to control what your users are seeing in the system and to identify key relationships with suppliers.

- **Supplier Classes** are used to identify preferred vendors and vendors with special classifications (such as minority or in-state business). They can also be used to identify a certain type of vendor – for example, all Office Supply vendors may receive a supplier class.

- **Category Classes** are used to build product views by controlling which categories of items are available to users or groups of users (roles).

- **Product Views** provide a flexible, detailed way for organizations to control item access in the application. They utilize Supplier Classes, Category Classes and other elements such as product flags to permit or prevent item ordering. Product views are configured on the organization level and assigned on the role or user level.

Related Permissions

Permission	Location
Catalog Management	Permission Settings > Administration > Catalog Administration

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Supplier Class Set Up

Supplier Classes are used to identify preferred vendors and vendors with special classifications (such as minority or in-state business). They can also be used to identify a certain type of vendor – for example, all Office Supply vendors may be assigned one supplier class.

Suppliers can be assigned one or more supplier classes. If multiple classes are assigned to a supplier, the highest preference ranking (1-10) will be assigned to products from that supplier. Therefore, if a supplier class with a ranking of 1 is assigned and a supplier class of 3 is assigned, then the supplier's products will be sorted using the first or more-preferred class. In other words, products from this supplier will show up above all non-preferred vendors AND all 2-10 ranked preferred vendors.

JAGGAER provides 100 standard and configurable supplier classes. Some organizations may need to add additional supplier classes. Supplier classes can be added through Catalog Management.

The **Catalog Management** permission (**Permissions > Administration > Catalog Administration**) is needed to perform this task.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Manage Supplier Classes**. Existing classes display in a list.

2. Click the **Create New Class/Definition** button.

3. Configure the new supplier class. The internal name can be the same as the display name, but internal name cannot be changed once the class is saved.

4. Click **Save**. For information about assigning supplier classes in the supplier profile, please see "Supplier Classes" in the online searchable help.

Category Class Set Up

Category Classes are used to build product views. They control which item categories are available to users and roles. Category classes are set up very similarly to the steps discussed in "Activating/Inactivating Categories" on page 522. The primary difference is that category classes are created when you want to control category access to a subset of your users.

Sample Category Classes

- **Lab Supplies Only Category Class** - For this class, you may turn off all categories for items such as office supplies, computer equipment and more. With this, you may only want your researchers to order Lab Items through JAGGAER.

- **Standard Category Class** - You could create a category class that is used by the majority of your users that allows shopping for everything except Computer Equipment. A second class could be created called All Shopping Class for the department heads that are allowed to order computer equipment.

- **Office Supplies Only** - A class can be created that allows access only to office supplies. This class could be used for admins or office managers.

Important: Category classes should be managed by high-level administrators who clearly understand what data should and should not be presented to users.

You must have the **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) to perform this task.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Manage Category Classes**. The category class list displays. The system limits the number of category classes to 30. Classes that have already been defined can be edited or a new class definition can be created. Inactive category classes are indicated by italicized text.

2. Click on the category class in the list. The definition information displays on the right.

3. Enter a **name** for the class and click the Active checkbox to make the class active at this time.

4. Click **Save**. Once the category class is created, it can be configured with the desired active/inactive status for each of the categories.

5. The next step is to assign categories to the class. Click on the **Configuration** tab.

6. In the **Select a Class/Definition to Modify** field, select the category class from the drop-down options. The categories display. When a category class is configured initially, all categories are off by default.

7. Browse to the categories that will be activated for the class. To activate a top-level category, click the ✅ icon in the **Global Toggle** column. Activating a top-level category automatically activates all of its child categories. To activate a child category, browse to the category and click the ⬆ in the **Global Toggle** column (the blue arrow indicates that the status is inherited). **Note:** These same steps can be taken to make a category inactive if you are updating an existing category class. Active categories are indicated by the ✅ in the **Result (on/off)** column. Inactive categories are indicated by the ❌ in the **Result (on/off)** column.

8. The activation/deactivation is saved automatically when it is configured.

Important: Category classes must be assigned to a product view, then the product view assigned to a user or role before it will take effect in the system. Therefore, category classes cannot be assigned directly to users. Refer to "Class and Product View Management" on page 463 for additional information.

Custom Catalog Attributes

Overview

Organizations have the ability to create, assign and manage custom attributes for items within supplier Hosted Catalogs. This functionality is referred to as **Custom Catalog Attributes (CCA)**. Common uses of CCAs include:

- Promoting items in search results based on the custom attributes.

- Links in the Supplier Showcase that returns all items with a specific attribute, allowing specific items to be promote for a supplier.

- Product search for items based on CCAs.

- Workflow and transaction exports.

Related Permissions

Permissions for custom catalog attributes are located under the user profile at **Permissions Settings > Administration > Catalog Administration.**

- **Manage Content** - Users with this permission have access to Hosted Catalog Content Administration. The user can affect item visibility, item attributes, and extract/view supplier content updates. If the user also has one of the **Approve...Price Files** permissions, the user may select to extract Content for a price set from the pricing > price sets page.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Creating Custom Catalog Attributes

Custom Catalog Attributes are managed by an organization administrator. CCAs can be created manually or through an import process. This task focuses on the manual process.

> **Note:** To import the information, navigate to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Hosted Catalog Content Administration** and click on the item buyer data import sub-tab. The **Item Administration Import Guide** can be accessed from this page and provides detailed instructions for the import process.

1. Go to the **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Hosted Catalog Content Administration**. The **item administration** tab displays by default.

2. Click on the **item attribute mgmt** tab. The existing CCAs display in a list.

3. If you are updating an existing CCA, click on the appropriate attribute and proceed to step 5. If there are a large amount of CCAs, use the search feature to locate the attribute. To create a new attribute, click the **Create New Attribute** button. Configure the information.

   - **Attribute Internal Name** - Enter the internal name for the attribute. This is the name that the application will use for exporting data, workflow setup, etc. Once saved the internal name cannot be changed. **Note:** An asterisk-space (*) is automatically appended to the front of the internal name when in the CCA. The value you enter in this field will be saved as the Display Name, but that can be edited.

   - **Data Type** - Select the data type from the drop-down options; *Checkbox, Drop-down, Textbox* or *Multi-select*. The data type cannot be changed once the CCA is saved.

4. Click **Create Attribute**. The information you configured is displayed. Be sure the values are correct and then click the **Confirm** button to save the CCA. The CCA details display.

5. Edit the main configuration details in the **Configuration** section as needed.

   - **Attribute Internal Name**, **Owner** and **Data Type** are not editable.

   - **Values vary by Business Unit** - Choose this option if the values for the field need to vary based on the user's business unit. Be cautious if you are changing this setting on an existing CCA because it will delete the current values.

   - **Active** - When this checkbox is clicked, the CCA is active.

   - **Icon** - Click the **Icon...** link to assign an image to the attribute if necessary.

6. Choose Search and Display Options for the Attribute. **Note:** If an existing attribute is made not searchable, any items that already have that attribute may still be searchable using the attribute for up to 1 week.

- **Searchable by itself - item administration** - Select this option to display the attribute on the search page so administrators can search the specific attribute data. Search criteria entered in the attribute field searches only the attribute.

- **Searchable by itself – shopper** - Select this option for the attribute to appear as a search filter in shopper product search. This search is separate from the item administration search available to administrators.

- **Show in product details view** Select this option to allow the attribute and value to be shown to the shopper in the item details view.

- **Show in shopper search results** Select this option to allow the attribute and value to be shown to the shopper in the product search results. If this option is selected, the attribute will display at the top of the search results.

- **Show in cart** - Select this option to allow the attribute and value to be shown in the cart.

- **Visible in Approval Emails** - When this option is enabled, the attribute and associated value will display in the approval email notification to users for requisitions, purchase orders, and invoices (if the notification is configured to include details).

- **Add to index** - Select one of the following options. This is only available for Multi-select, dropdown and Text Box attributes:

  - **Include in Part Number index** - Select this option if you would like the attribute values to be included in a user's Part Number search. If the user searches on the Part Number field in product search, this attribute would be included in the search.

  - **Include in Supplier Name index** - Select this option if you would like the attribute values to be included in a user's Supplier Name search. If the user searches on the Supplier Name field in product search, this attribute would be included in the search.

  - **Include in keyword index / quick search** - Select this option if you would like the attribute values to be included in a user's keyword search. If the user searches on a general keyword in product search, this attribute would be included in the search.

- **Promote items in search results** - Select this option to allow items with a value for this attribute to be indicated as Preferred in search results, and returned first in search results before Category and Supplier preferences. This option is only available for attributes that have a data type of Checkbox.

- **Include in Transaction Reports** - Select this option if you would like the attribute values to be included in the Purchase Requisition (PR) and Purchase Order (PO) Transaction and Full Export reports.

- **Include in Favorites Import/Export** - Select this option to include the custom catalog attribute when importing or exporting Favorites.

- **Auto filter Results** - When this option is selected, the attribute must be checked on an item for that item to show in a product search. This option is only available for attributes that have a data type of Checkbox.

7. In the **Keyword Search Terms** box, for Check Box attributes, you can enter keywords that to be used in a user search to identify these items. For example, for the attribute Hot Item you may associate keywords of new, popular, frequently used, etc. so that if a user searches for "new items", the attributed data is included in the search results.

8. Choose the Display Text and Help for the Attribute. This works very similar to field management for other types of fields.

9. Click the **preview saved values...** beside of the Default field to see the current values.

10. Enter a new name if you do not want to use the Internal Name. For example, instead of Med, you may want to use Medical Storeroom Item for the Display Name.

11. Enter **Help Text** to explain and identify the field.

12. Select a **Language** for the Help to display.

13. Click **Save**.

Associating Items with a Custom Catalog Attribute

There are two primary ways to associate CCAs with items in the application. The association can be performed manually or through an import process. This task focuses on the manual process.

> **Note:** To import the information, navigate to **Setup** ⬚ **> Hosted Catalog and Ordering Configuration > Hosted Catalog Content Administration** and click on the item buyer data import sub-tab. The **Item Administration Import Guide** can be accessed from this page and provides detailed instructions for the import process.

1. Go to **Setup** ⬚ **> Hosted Catalog and Ordering Configuration > Hosted Catalog Content Administration**. The **Item Administration** tab displays by default.

2. **Search for products**. In Item Administration search, the Administrator enters search criteria for the products needing custom attribute values. The Administrator may utilize quick or advanced search. Advanced search may contain custom attributes as filters, depending on the configuration of the custom attributes in item attribute mgmt.

3. Once the item(s) display in the search results, you can choose to make items viewable to end-users or not viewable or export the information. **Note:** An export for a specific supplier can be created within Item Administration, however, it is recommended as a best practice that Administrators extract all available products for a specific supplier through the content export within catalog mgmt>pricing instead of utilizing the Item Management export. This allows the Administrator to manage content for all the products with pricing applicable to the organization.

4. Export Results:

   - **Export all results.** If all search results are needed, choose the button to generate an export file of all displayed results (up to 100,000 rows).

   - **Export selected results.** If only selected values from the search results should be exported to a file, select the appropriate items and choose Export Selected from the drop down box and select Go.

   - **Select an item to add custom attribute values**. If only a few values need to have custom attribute values assigned, the Administrator may assign values individually through the application, rather than exporting search results to edit and re-import.

The Export Format

- Exported files (selected or all depending on what the administrator chooses) contain up to 100,000 rows*. Only Active organization attributes identified through Item Attribute Management are exported in addition to the basic system information for the identified products.

- The Export is a tab delimited, text file.

- Exports are available in the system for download for 24 hours.

- Administrators may also export content from the catalog mgmt>pricing view. Content exports based on a price file contain all valid rows for the price file (not limited to 100,000 rows).

Searching for Item Attribute Information

1. Go to the **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Hosted Catalog Content Administration**. The **item administration** tab displays by default.

2. Click the **item attribute mgmt** tab.

3. Select **Click to Search for Attribute** and choose the appropriate filter options as follows:

   - **Show** - Choose to search across **All Attributes** or only your **Organization Attributes** (attributes created by your organization. These attributes are not visible to other organizations or external suppliers).

   - **Attribute Name** - Enter all or part of the attribute name.

   - **Status** - The default Item Attribute search returns only active attributes. Select from the dropdown menu if you would like to view inactive attributes, or all attributes.

   - **Show only searchable attributes** - Check this box to show attributes that are designated to be part of the user search criteria.

4. Click **Search**.

Product Flags and Views

Overview

Product flags provide a way to associate an important product "type" with specific products. These visual cues are used to identify items that should be marked for special handling, delivery, or workflow routing. For example, workflow can be set up to route radioactive items to users who are permitted to approve such items. These flags are important to organizations because they facilitate the ordering of these sensitive products directly from the JAGGAER system. If a supplier "flags" an item in the item data, an icon will display in both the search results and the cart for that item.

In the example below, the item is marked as with the Hazardous Material flag.
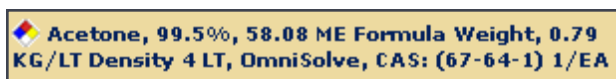
Important: As items are flagged by suppliers, JAGGAER cannot guarantee the accuracy of product flags assigned or not assigned to items. We strongly suggest to suppliers to accurately populate these fields, but since the accuracy cannot be monitored, we suggest you contact the supplier directly if you notice an issue.

Related Permissions

Permission	Location
Catalog Management	Permission Settings > Administration > Catalog Administration

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Product Flags

The table below provides a description and icon for each of the potential product flags that can be identified by the supplier:

Icon	Description of Product Flag
	Radioactive: Substances that have a radionuclide in their structure. Such 'radiolabeled' substances have radioactivity associated with them above the background level of radiation and therefore need to be tracked. The radioactivity is typically reported via product size in Curies or Becquerels. End users need specific radioactive material handling license to handle such products.
	Hazardous Material: Substances that are hazardous due to their physical/chemical properties. Some examples of hazardous materials are: extreme flammables, oxidizers, explosives, peroxides, pyrophorics, water reactive and unstable substances.
	Controlled Substances: Substances that are addictive drugs or can be easily converted into addictive drugs. The government (FDA, DOJ) regulates the use of these substances. Depending on the addiction/abuse potential of a substance it is classified into one of the five schedules. This flag also includes List I and II substances - those substances that are used in manufacturing scheduled substances. Information on these substances can be found at: http://www.usdoj.gov/dea/agency/csa.htm http://www.fda.gov/opacom/laws/cntrlsub/cntlsbb.htm
	Recyclable: Materials that can be recycled through established recycling programs. This flag can be used for any environmentally friendly item - from products used in green chemistry programs to recycled office products.

Icon	Description of Product Flag
	Radioactive Minor: Materials that have minute amounts of radioactivity and typically do not need a specific radioactive material handling license (e.g. RIA kits have I125 radionuclide but the activity is < 10 microCuries). If such materials are handled in bulk amounts, the cumulative activity might be sufficient to trigger a radioactive license. This flag is designed as a way to track such material without necessarily considering it more restrictive, radioactive material.
	Toxins: Various substances used in research (e.g. bacterial toxins, animal venoms) to study specific cell processes such as signal transduction mechanism.
	Select Agents: Materials found on the list maintained by CDC for monitoring the use of specific pathogens. The list can be found at: http://www.cdc.gov/od/sap/docs/salist.pdf http://www.cdc.gov/od/sap/

Icon	Description of Product Flag
	Radioactive: Substances that have a radionuclide in their structure. Such 'radiolabeled' substances have radioactivity associated with them above the background level of radiation and therefore need to be tracked. The radioactivity is typically reported via product size in Curies or Becquerels. End users need specific radioactive material handling license to handle such products.
	Hazardous Material: Substances that are hazardous due to their physical/chemical properties. Some examples of hazardous materials are: extreme flammables, oxidizers, explosives, peroxides, pyrophorics, water reactive and unstable substances.
	Controlled Substances: Substances that are addictive drugs or can be easily converted into addictive drugs. The government (FDA, DOJ) regulates the use of these substances. Depending on the addiction/abuse potential of a substance it is classified into one of the five schedules. This flag also includes List I and II substances - those substances that are used in manufacturing scheduled substances. Information on these substances can be found at: http://www.usdoj.gov/dea/agency/csa.htm http://www.fda.gov/opacom/laws/cntrlsub/cntlsbb.htm
	Recyclable: Materials that can be recycled through established recycling programs. This flag can be used for any environmentally friendly item - from products used in green chemistry programs to recycled office products.
	Radioactive Minor: Materials that have minute amounts of radioactivity and typically do not need a specific radioactive material handling license (e.g. RIA kits have I125 radionuclide but the activity is < 10 microCuries). If such materials are handled in bulk amounts, the cumulative activity might be sufficient to trigger a radioactive license. This flag is designed as a way to track such material without necessarily considering it more restrictive, radioactive material.

Icon	Description of Product Flag
☠	Toxins: Various substances used in research (e.g. bacterial toxins, animal venoms) to study specific cell processes such as signal transduction mechanism.
☣	Select Agents: Materials found on the list maintained by CDC for monitoring the use of specific pathogens. The list can be found at: http://www.cdc.gov/od/sap/docs/salist.pdf http://www.cdc.gov/od/sap/

Creating Product Views

Product views provide a flexible, detailed way for you to control product access in the application. The allow you to control access to item categories, suppliers and to items with specific product flags. Product views can be assigned to users, roles and business units.

Supplier classes, category classes, and product flags can be used to define a product view. In some cases it will make sense to use multiple control types, but you are only required to use one. Supplier classes and category classes must be set up prior to being used in a product view. Assignment of supplier classes and category classes are cumulative, meaning they do not "override" each other if something is turned off for the user. If one class prevents access to a particular supplier or category and another class grants access to that same supplier or category, then the user will have access to the supplier and/or category because it is allowed by at least one assigned product view.

Important! There is a maximum of 100 product views per organization.

The **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) is needed to perform this task.

Create a Product View

Note: It can take up to fifteen minutes for a product view to take effect, meaning that your users may not see the changes to a product view for this time period after it is saved/updated.

Note: Remember that a product view must be assigned to a user, role, or business unit in order to take effect.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Manage Product Views**. The Product Views page displays with existing views listed on the left.

2. To create a new product view, select the **Create New View** button. To update an existing product view, click on the view from the list on the left.

3. Enter the product view name and a description (optional). Click the **Active** checkbox to make the view active.

4. Click **Save** (or **Update** if you updating an existing view). Once the product view has been created, the screen updates to provide a summary of the product view, indicating what filters are applied (there will be none with a new product view).

5. Configure the product view.

Using Supplier Classes in the Product View

1. Click on the **Supplier Classes** tab and choose one of the following options:

   - **Exclude** - Use this action to assign supplier classes by excluding selected classes. This action is best used when the product view needs access to most of the supplier classes, minus only a small number. Click the **Exclude** button and then click the checkbox for each supplier class that should be excluded.

     - In the **Control Full Visibility** section, select one of the following options to specify when to exclude suppliers in product views. Click the **Exclude Selected Classes** button when you are done:

       - Items from Suppliers in these Supplier Classes will **not** be seen in Product Search

       - Suppliers in these Supplier Classes will **not** be seen in Product Search or Supplier Showcase

       - Suppliers in these Supplier Classes will **not** be seen in Product Search, Supplier Showcase, Non-Catalog or Form Supplier selections.

   - **Include** - Use this action to assign supplier classes by selecting classes. This action is best used when the product view only needs access to a few supplier classes. Click the **Include** button and then click the checkbox for each supplier class that should be included.

     - In the **Control Full Visibility** section, select one of the following options to define to specify when to include suppliers in product views. Click the **Include Selected Classes** button when you are done.

- Items from Suppliers **not** in these Supplier Classes will **not** be seen in Product Search

- Suppliers **not** in these Supplier Classes will **not** be seen in Product Search or Supplier Showcase

- Suppliers **not** in these Supplier Classes will **not** be seen in Product Search, Supplier Showcase, Non-Catalog or Form Supplier selections.

2. When you save the supplier classes, the **Definition** tab updates with the information.

Using Category Classes in the Product View

1. Click on the **Category Classes** tab.

   - **Exclude** - Use this action to assign category classes by excluding selected classes. This action is best used when the product view needs access to most of the category classes, minus only a small number. Click the **Exclude** button and then click the checkbox for each category class that should be excluded. Click the **Exclude Selected Classes** button.

   - **Include** - Use this action to assign category classes by selecting classes. This action is best used when the product view only needs access to a few category classes. Click the **Include** button and then click the checkbox for each category class that should be included. Click the **Include Selected Classes** button.

2. When you save the category classes, the **Definition** tab updates with the information.

Using Product Flags in the Product View

1. Click on the **Category Classes** tab.

   - **Exclude** - Use this action to assign product flags by excluding selected flags. This action is best used when the product view needs access to most of the product flags, minus only a small number. Click the **Exclude** button and then click the checkbox for each product flag that should be excluded. Click the **Exclude Selected Product Flags** button.

   - **Include** - Use this action to assign category classes by selecting flags. This action is best used when the product view only needs access to a few flags. Click the **Include** button and then click the checkbox for each product flag that should be included. Click the **Include Selected Product Flag** button.

2. When you save the product flags, the **Definition** tab updates with the information.

Enable Shopping Personas

Overview

The **Shopping Persona** feature allows users to shop for more than one department or business unit without having to make changes to their user profile. This is a useful feature for organizations with users who split their shopping responsibilities across departments or business units. A user can simply select the appropriate persona and shop with the available forms, favorites, and showcase assigned for the department or business unit.

Users can have one or more persona assigned to them and toggle between the personas through the user menu. Personas are assigned in the User Profile. Users can toggle between personas from the user menu.

Note: MBU Organizations must have the **Restrict Access by Business Unit** feature enabled to provide access for document search and persona shopping by Business Unit. Please see "Business Unit Configuration and Management" in the online searchable help for additional information.

Related Permissions

Permission	Location
Edit Roles/Depts/Relationships	Permission Settings > Administration > User Administration

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Enable the Shopping Persona Shopping Feature

The **Edit Roles/Depts/Relationships** permission (**Permission Settings > Administration > User Administration**) is needed to complete this task.

1. Go to **Setup** ⚙ **> Organization Structure and Settings > Configure User Persona Settings**.

2. Click the **Enable Profile Personas** checkbox.

3. Beneath the checkbox, click the entities on which you would like to create personas:

- **Business Unit** allows personas to be created based on Business Unit.

- **Department** allows personas to be created based on Department.

- **Position** allows further definition of a department persona by selecting a position that is associated with the department.

- **Code Favorites** allows account code favorites to be associated with a persona.

4. Click **Save**.

See also .

Enable Self-Managed Catalogs

Overview

Customers can use self-managed catalogs to upload and update catalog product and price information on behalf of a supplier.

To enable the use of self-managed catalogs, customers first turn on the **Enable Self-Managed Catalogs** setting at the organization level to activate the feature and then enable self-managed catalogs for individual suppliers. From there they can upload catalog content and pricing for the enabled suppliers.

Related Permissions

- The **Manage Content** (Permission Settings > Administration > Catalog Administration) permission is needed to enable self-managed catalogs for an organization.

- The **Manage Supplier Profiles** (Permission Settings > Administration > Supplier Profile Administration) permission is needed to enable self-managed catalogs for a supplier.

- The **Edit Items/Catalogs** (Administration > System Administration) permission is needed to manage catalog content and pricing for suppliers that have been enabled for self-managed catalogs.

Suppliers Eligible for Self-Managed Catalogs

Self-managed catalogs can be turned on for new suppliers, or **In Network** suppliers that are part of an organization's network and *not* a supplier from the supplier portal network. Self-managed catalogs cannot be enabled for suppliers from the supplier portal.

There are a few ways to find out if a supplier is eligible for enabling self-managed catalogs:

- Open the supplier profile and select **About > System Settings** on the left. In the right panel, check to make sure the **Has Catalog?** is not enabled. If the field is already enabled, that supplier cannot be enabled for self-managed catalogs.

- If the organization setting for self-managed catalogs is enabled, expand the **Supplier Actions** menu and note if the **Enable Self-Managed Catalog** option is displayed. The option is not available for suppliers that are not eligible to use the self-managed catalog feature.

Enable the Organization Setting

Follow these steps to enable the use of self- managed catalogs for your organization.

1. Navigate to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Hosted Catalog Content Administration**.

2. Click the **hosted catalog content** tab.

3. Click the **default settings** sub-tab.

4. In the **Enable Self-Managed Catalogs** field, select the **Override Default Values** checkbox, then the checkbox next to the field.

   > **Note:** The **Send email when content changes** field on this page is used for hosted catalogs. Users who have subscribed to the Supplier Content Update Notification will receive an email if a supplier uploads a file that modifies the content of their catalog.

5. Click **Save**. Once the setting is enabled:

   - The **Enable Self-Managed Catalogs** option is available under **Supplier Actions** on the appropriate supplier profiles.

   - The **Hosted Catalog Items and Price** menu option is visible in the **Contracts** module. This area is used to upload catalog content and pricing.

Enable Self-Managed Catalog for a Supplier

Follow these steps to enable the Self-Managed Catalog feature for an **individual supplier on their supplier profile**.

Enabling the self-managed catalog feature for a supplier means that your organization will manage catalog product and price information on behalf of that supplier. **This action cannot be reversed.**

1. Navigate to **Suppliers** ⊞ **> Manage Suppliers > Search for a Supplier** and locate the appropriate supplier profile.

2. Choose one of these options to enable the self-managed catalog feature for the supplier. This action is not available if a supplier is not eligible to use the self-managed catalog feature:

   - *From the search results* - Click the **Manage** button next to the appropriate supplier and select **Enable Self-Managed Catalog**.

   - *From the supplier profile* - Click **Summary** in the left menu. Click **Supplier Actions** in the top right corner and select **Enable Self-Managed Catalog**.

3. A confirmation pop-up window asks you to confirm that your organization will manage the catalog content and pricing for that supplier. This action cannot be reversed.
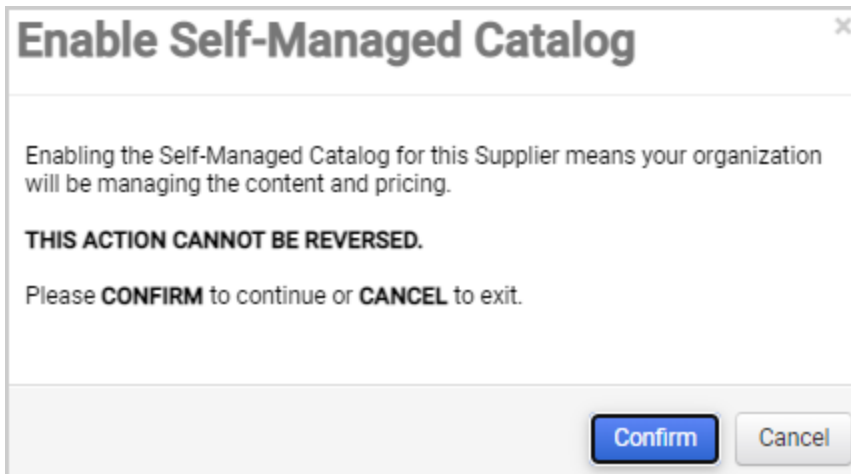
4. Click **Confirm**. Once enabled:

- The **Has Catalog?** setting is automatically enabled on the supplier profile under About > System Settings.

- In the **Contracts** ⊞ **> Hosted Catalog Items and Price** menus, the supplier's name is available for selection in the **Supplier** fields.

  Note: For organizations with Inventory Manager ONLY - In order for a user to see the supplier as an option in the **Supplier** field on the Hosted Catalog Items and Price pages, the supplier needs to be active for shopping and the user who will be managing catalog content needs to be given fulfillment center access:

  a. *Activate the supplier for shopping* - In the supplier profile, select **About > General** in the left menu. Ensure the **Active for Shopping** checkbox is selected and save changes.

  b. *Update user profiles* - Open the appropriate user profile. On the left, select **User Roles and Access**, then **Fulfillment Center Access**. Select the checkbox next to the appropriate fulfillment center and save changes.

Next Steps

Once a supplier is enabled for self-managed catalogs, you can begin uploading catalog content and pricing.

There are two primary ways to add self-managed catalog items to the system: via a file import for bulk loading of items and manually in the application on an item-by-item basis. All of these tasks are performed from the **Contracts** ⊞ **> Hosted Catalog Items and Price** pages.

The process for adding and managing items via bulk load is explained in the **Supplier Data Quick Reference Guide** and the **Supplier Catalog Management Handbook** found on the **Submit Hosted Content and Price Data** page as indicated below. A content and pricing file needs to be prepared and uploaded, and then the information is syndicated to the system to make it available to end users.

> **Note:** The screens used to perform these tasks are shared by third-party suppliers uploading hosted catalog data. Therefore, some of the fields and information displayed may not be relevant to your purpose.

Enable External Marketplace (Product Search)

Overview

Amazon Integrated Search allows organizations to provide integrated Amazon Business Marketplace search results within eProcurement so that users can shop for products from Amazon in JAGGAER.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Using Amazon Integrated Search

If your organization has enabled Amazon Integrated Search, users with punch-out access to an Amazon Business Marketplace supplier can shop for products from the Amazon Marketplace as follows:

1. Users shop for an item as usual, i.e., by entering a search term in the Shopping widget.

2. In the search results, the **External Marketplace Results** tab shows items from the Amazon Marketplace that match the search criteria. Items from all other suppliers are shown on the **Search Results** tab.

3. When the option to show delivery lead time is selected in the search results page (click the gear icon 🔧 on the search results page and select Delivery Lead Time), the product card will display Amazon delivery information.

4. If the Amazon supplier is selected as a filter, **Amazon departments** are displayed as options in the filter panel. The Amazon departments shown will vary based on the supplier selected and the search criteria.

If users select an Amazon department filter, additional Amazon filters that correspond to the department are displayed. Additional filters are only displayed if **one** Amazon department is selected.

5. Users can click on an Amazon item's **product description** in the search results to display the product card and view details about the item. The Amazon Product Details overlay shows much of the same information as the regular search results Product Details overlays. In some cases, there may be more information provided about the Amazon product than is typically seen on the hosted Search Results tab. It has an additional **About This Item** section that provides more information about an item.

> **Note:** Product details vary widely. JAGGAER displays this information as it is provided by Amazon so there may be inconsistent information from product to product. In many cases not all information shown in the regular Product Details overlay (such as the Manufacturer Part Number) will be provided.

6. Users can click the ⬲ **Order From Supplier** button to select an item. They will be directed to the item in Amazon, where they can add the item to their cart. Once the item is placed into the cart in Amazon, the user will be returned to JAGGAER to complete the ordering process.

> **Note:** If an item is not available, a message will indicate that it is not available for purchase and the ⬲ **Order From Supplier** button is not displayed.

Additional notes about the **External Marketplace Results** tab:

- External Marketplace Results are returned and sorted in an order determined by Amazon.

- The **Show Details** options ⚙ are displayed differently in this tab. The manufacturer name and number are provided only for some items, and the part number is Amazon's Standard Identification Number (ASIN).

- Not all shopping functionality is available at this time. For example, users can't use the Compare or Sort options. Additional functionality is planned for future releases.

- For **Amazon Business Prime** accounts, the Amazon administrator has the capability of adding Buying Policies. The policies can be to mark items in the catalog as Restricted, Preferred or Blocked. If an item is **Preferred** or **Restricted**, an icon will be displayed next to that item in the External Marketplace search results. When a user punches out to Amazon, they will see a note at the top of the screen providing more information about that flag. **Blocked** items are not returned in the External Marketplace Results.

  The Amazon Business account administrator can set these policies with additional messaging that appears on the product in the punch out. JAGGAER does not set the flags for items or notes. There is no workflow routing for restricted items.

- There are limited **Advanced Search** options available. A note on the Advanced search tab indicates that only the **All of these Words**, **Supplier**, and **Part Number (SKU)** search fields can be used for an External Marketplace search. All other search terms are ignored. To search for a supplier, users must enter a supplier name and include a value for one of the other fields. For example, search for "All of these Words + Supplier" OR "Part Number (SKU) + Supplier". Users cannot search for a supplier only.

- If configured by your organization, users with punch-out access to the supplier can shop from an Amazon supplier sticker in a shopping showcase on the Shopping Home page. Entering a search term in the sticker will take users to the search results in the **External Marketplace Results** tab in JAGGAER. Amazon supplier stickers may also be configured with an external link that will take them to the Amazon site.

Elements Required for Setup

The following elements are needed to enable Amazon Integrated Search:

- Organizations need an Amazon Business Marketplace account.

    - Customers need to authorize each Amazon supplier profile in their system to use Amazon Integration Search using their Amazon Business Marketplace account credentials. This is a 1:1 relationship, so it is recommended to have an Amazon supplier profile for each Amazon Business Marketplace account that is being enabled.

    - If your organization's Amazon supplier is not already enabled for punch-out access, please contact JAGGAER to enable punch-out settings.

- The **Manage Supplier Profiles** permission is needed to enable this feature. The user enabling the feature will also need their organization's Amazon Business Marketplace account credentials.

- **Please use caution if sending test orders**. **Amazon Business Marketplace accounts are LIVE in UIT and Production sites. Testing orders against a live account will result in a real order if completed. Amazon Integrated Search does not impact any existing cXML PO connections and organizations do not need to re-test.**

Enable Amazon Integrated Search

Enable Amazon Integrated Search as follows:

1. Authorize Amazon Marketplace for each Amazon supplier in your system that has a punch-out with Amazon. If there are multiple Amazon suppliers (i.e., Amazon USA, Amazon UK), each Amazon supplier needs to be authorized individually. **Note:** If your organization's Amazon supplier is not already enabled for punch-out access, please contact JAGGAER to enable punch-out settings.

    a. Navigate to **Suppliers** **> Manage Suppliers > Search for a Supplier**.

    b. Search for and open the appropriate **Amazon** supplier profile.

    c. In the left menu, click **eProcurement**, then **Integration Settings**.

d. In the **PunchOut Settings** section on the right, locate the **Authorize Amazon Marketplace** field and click the **Authorize** button. Once the button is clicked you are directed to Amazon.

> **Note:** If you do not see this setting, please contact JAGGAER.
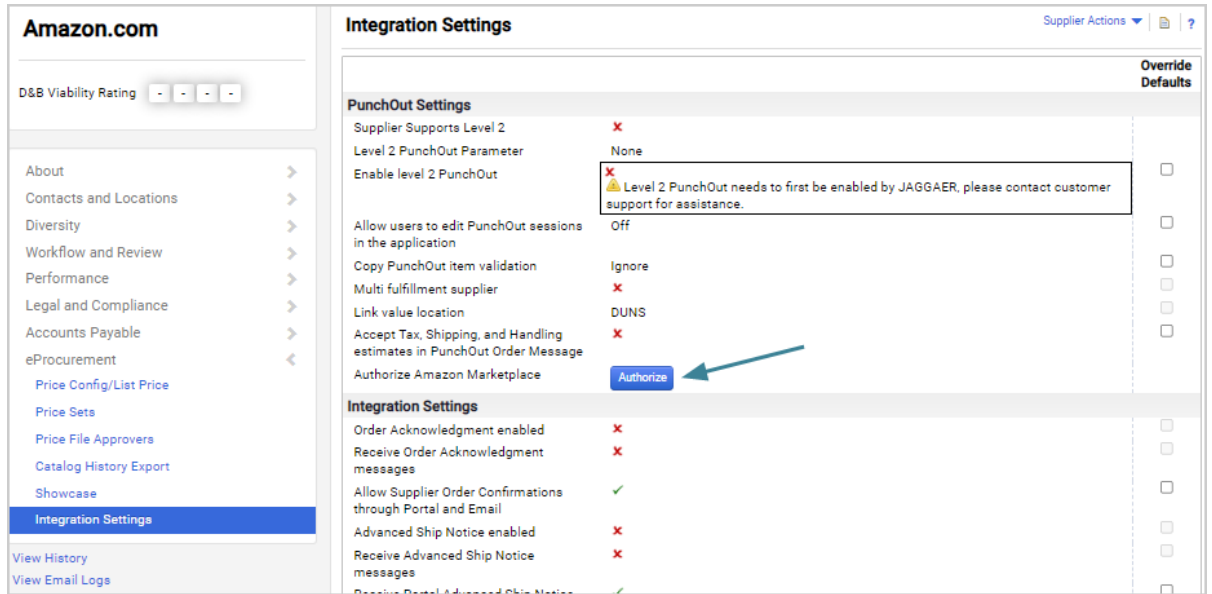
> **Note:** Please contact Amazon for any issues accessing your Amazon Business Marketplace account credentials.

e. In the Amazon Business window, enter your organization's Amazon Business Marketplace account credentials and authorize use of the account.
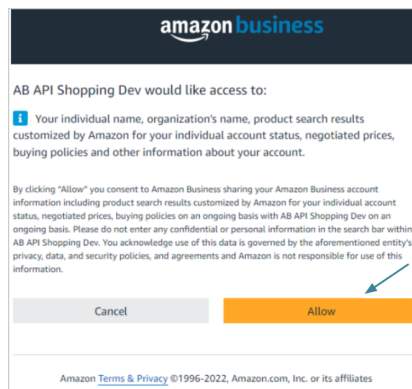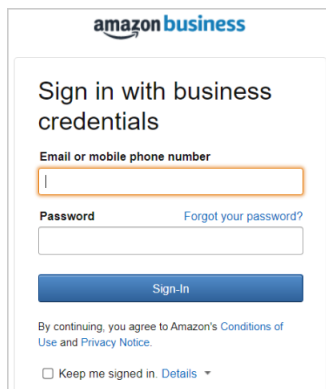
> Note: Please contact Amazon for any issues accessing your Amazon Business Marketplace account credentials.

f. Once the authorization is successful, you are returned to JAGGAER and a message in the supplier profile will indicate that the supplier is now **Authorized with Amazon**.

Authorize Amazon Marketplace	✔ Authorized with Amazon	Deauthorize
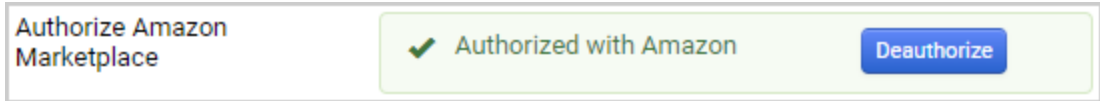
> **Note:** Click the **Deauthorize** button to remove Amazon Integrated Search. This removes the Amazon link in JAGGAER. Once the deauthorization is confirmed in JAGGAER, users will be directed to log into their Amazon Business Marketplace account where they can follow the prompts to remove access there. Customers will not be able to re-authorize Amazon Integrated Search at a future date unless it has previously been deauthorized in both JAGGAER and in their Amazon Business Marketplace account.

g. In the **Show External Marketplace Results in Product Search** setting, choose one of these options from the drop-down menu to specify when search results are displayed in the External Marketplace Results tab:

- **Always** (default setting) - Select to always display results in the External Marketplace Results tab.

- **Only if local result is below threshold** - Select to only display results in the External Marketplace Results tab if products from locally hosted results are below the threshold entered below.

- **Local result threshold** - This field is displayed if "Only if local results is below threshold" is selected. Enter a value between 1 and 4000 that represents the minimum number of locally hosted search results that must be displayed before products from the external supplier are shown in the External Marketplace Results tab.

  - If a user performs a product search and the number of locally hosted search results are below this value, the External Marketplace Results tab will not display products from the external supplier and a message will indicate products from the supplier's external marketplace are available but are not displayed due to the organization's configuration.

- If a user performs a product search and the number of locally hosted search results are above this value, the External Marketplace Results tab will display products from the external supplier.

2. Update **user profiles** and/or **user roles**. Users need punch out access enabled for the Amazon supplier to use the Amazon integrated search. This can be found on their user profile under Ordering and Approval Settings > PunchOut Access:

   a. Open the appropriate user role or user profile:

      - *User roles* - Navigate to **Setup** ⚙ **> Organization Structure and Settings > Manage User Roles**.

      - *User profiles* - Navigate to **Administer** 🔧 **> Manage Users > Search for Users**.

   b. In the left menu, select:

      - *User roles* - **Purchasing**, then **PunchOut Access**.

      - *User profiles* - **Ordering and Approval Settings**, then **PunchOut Access**.

   c. **Enable PunchOut access** for the appropriate Amazon Marketplace supplier(s).

   > **Note:** Users who are not associated with your organization's Amazon Business Marketplace account will not see search results in the **External Marketplace Results** tab. If a user is not already linked to the account, the first time they open the Amazon Marketplace punch-out (for example, from the supplier sticker on a showcase) they will automatically be added to the account.

3. Update Amazon **showcase stickers** (optional):

   a. Navigate to **Shop** 🛒 **> Shopping Settings > Manage Shopping Showcase**.

   b. Locate the appropriate Amazon supplier sticker and click the **edit** icon in the sticker.

   c. Choose these options in the **Create/Edit Showcase Stickers** window:

      - **Showcase Catalog Search** - Select this checkbox (under the Available Supplier Showcase Options sub-heading) to display a search field in the sticker. Users with punch-out access to the supplier can enter a search term

and will be taken to the **External Marketplace Results** tab in JAGGAER to view search results.

- **Showcase PunchOut** - Select this checkbox to display a punch-out link in the sticker that will take users to the Amazon site. This link may already be enabled for existing punch-out customers.

Make Items Viewable or Not Viewable to Requisitioners

Overview

You can make specific hosted items viewable or not viewable to requisitioners. This provides complete, detailed control over what items can be ordered by what supplier for hosted items. If an item is not viewable, that means that it does not appear in a user's search results. **Note:** If a large number of items need to be marked not viewable, you can import a file to make changes in bulk.

Related Permissions

Permission	Location
System Configuration	Permission Settings > Administration > System Administration
Catalog Management	Permission Settings > Administration > Catalog Administration
Manage Content	Permission Settings > Administration > Catalog Administration

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Make Items View or Not Viewable

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Hosted Catalog Content Administration**. The **Item Administration** tab displays by default.

2. Search for the item using the search fields. The search results display. The **Viewable** column for each item indicates the current status of that item. A ✅ indicates that the item is viewable. A ❌ indicates that it is not.

3. For each item you are viewing, click the associated checkbox.

4. In the drop-down field located in the upper-right corner, select the appropriate action for the selected fields.

- To make items that are viewable not viewable, select *Make not viewable*.

- To make items viewable that are not viewable, select *Make viewable*.

5. Click **Go**. A confirmation window displays. Click **Disable** (if you are turning off viewability) or **Enable** (if you are turning on viewability).

Changing the Status in Bulk

If a large number of items need to be marked not viewable, you can import a file to make changes in bulk. Click on the **item buyer data import** tab. Download the **Item Administration Import Guide** for detailed instructions.

Consortium Management

Overview

A **Consortium** is a single organization created to facilitate a relationship and foster cooperation among a group of organizations. The goal of a consortium is to reduce duplication of supplier negotiations among the organizations, increase buying power, and ultimately to lower prices/costs for goods and services. Many colleges/universities and governmental entities create and/or participate in Consortiums. A **Group Purchasing Organization (GPO)** is an entity that leverages the purchasing power of a group of businesses (via memberships) to obtain discounts from suppliers based on the collective buying power of those GPO members. Examples are Provista/Novation and HIGPA: Health Industry Group Purchasing Association. Many hospitals, governmental entities and higher education organizations participate in GPOs.

Note: Though Consortia and GPOs are different business models, they contain many similarities from a data management and pricing syndication perspective. Therefore, the term "Consortium" is used in this documentation and in the application to represent both business models. These fields are modifiable within field management and can be updated in the application by your administrator to best reflect your organization's business needs.

Groups Related To Consortium Management

There are two perspectives in consortium management, **Consortium (or GPO)** and **Member**.

Consortium (GPO) Perspective

This perspective represents the organization that manages the supplier negotiations and contracts. This group also determines who is allowed to take advantage of the supplier relationships. As an organization that is responsible for sharing, or publishing, pricing with other organizations, you have the ability to:

- Activate/Deactivate members (i.e. , "who" is a member of my consortium)
- Indicate suppliers that are available to members through your consortium (i.e., associate suppliers with the consortium)
- Access spend information from members for consortium suppliers
- Share pricing for hosted consortium suppliers with all members or selected members
- Create contracts and determine what members have access to the contracts

Member Perspective

Members are the JAGGAER customers that take advantage of the consortium. In most cases there are multiple members for each consortium/GPO. As an organization that participates in a consortium (Member), you have the ability to:

- Enable the consortium (i.e., say "yes" I am a member of this consortium)
- Choose which suppliers from the consortium you are interested in using
- Select additional reporting options for the consortium
- Subscribe to pricing shared by the consortium
- Take advantage of a consortium contracts available from a consortium

Purchasing Methods Available with Consortium

There are three different purchasing methods that can be associated with a supplier. A consortium supplier can be associated with a hosted catalog (price file). Members can easily see what items are associated with a consortium supplier. Non-catalog items can also be associated with a consortium supplier, although not necessarily the most effective pricing method. Lastly, contracts can be associated with a consortium supplier. By taking advantage of a contract, a member organization can view the information about the contract (details such as start/end dates, accessibility – who can access the contract, etc.), and more.

Related Permissions

The **Hosted Catalog Search** permission (**Permission Settings > Shopping, Carts & Requisitions > Shopping**) and the **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) is needed to enable suppliers for a consortium membership.

See for information on eProcurement permissions.

Enabling Suppliers for your Consortium Membership

As a member of a consortium or group purchasing organization, you will want to manage which suppliers are enabled on your site and which ones are not. In some cases, organizations may be members of multiple group purchasing organizations or consortia. You can manage all of these things through a single interface.

You must have the **Hosted Catalog Search** permission (**Permission Settings > Shopping, Carts & Requisitions > Shopping**) and the **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) to complete this task.

1. Go to **Contracts** ⬚ **> Consortium Settings > Consortium Member Settings**. The **Consortium Member Setup** page displays.

2. The Consortia/GPOs display on the left. Click on the name to open it for editing.

3. Locate the **Participating in Consortium:** checkbox in the Consortium Details on the right. This checkbox must be enabled in order to manage the consortium suppliers. If it is not, click the checkbox and then click **Save**. The available suppliers display.

4. Click the checkbox on the far right for each supplier that needs to be activated.

5. Locate the drop-down field above the supplier list. Select the *Enable selected suppliers for use with consortium* option. **Note:** To disable a supplier, follow steps 4 and 5, but select *Disable selected suppliers for use with consortium*.

6. Click **Go**. The suppliers are enabled for the consortium. Additional details:

   - When you enable a hosted catalog supplier for the consortium, the next step is to subscribe to the pricing for that supplier. For information, please see **Subscribe to Consortium Pricing** below.

   - If you enable a punchout supplier, the actual punchout configuration is not inherited from the parent... you must work with JAGGAER directly to configure any punch-out integrations.

7. If you decide not to use one of the suppliers, enable the **Select** checkbox and choose **Disable selected supplier for use with consortium** from the drop-down box.

Publish Consortium Pricing

The Consortium publishes pricing to the member organizations, but it is up to the member organizations to subscribe to the pricing

The member chooses to subscribe to pricing that the consortium has published to the member organization. Pricing will only display for suppliers that the member has enabled. See the Help for the member's consortium pricing tab for additional information on the specific fields

1. Go to **Contracts** **> View Consortium Price Sets**. The **Consortium Pricing** tab will display.

2. The default view are price sets that have been shared by the consortium, but the member has not yet chosen to subscribe or not subscribe. If the appropriate supplier enablement has not been configured by JAGGAER, a warning message displays, preventing the member from subscribing to the pricing. To see a list of price sets that have been published or to filter the current results set, expand the **Consortium Price Set Filter**.

3. You may choose to extract the consortium pricing for review. Select the **extract** link in the **Actions** column.

4. Publish the price set by selecting **contract publishing** link in the **Actions** column.

5. Select the **Publish** checkbox for each member to whom you would like to publish the pricing. You can also select the **All** link to select all listed members.

6. Click **Save**. The price set will be published to the selected members.

> **Note:** If you would like to publish the price set automatically to any new member, select the Automatically publish to new members checkbox in the top left corner.

Subscribe to Consortium Pricing

When a supplier is part of a consortium, the catalog pricing for the supplier may be shared with the consortium members. Pricing can be shared with ALL or a select group of consortium members. When a price set is shared, you can choose to subscribe to the pricing.

1. Go to **Contracts** **> View Consortium Price Sets**. The **Prices** page will display with the **Subscribe to Pricing** sub-tab active.

2. The view will default to price sets to which you have not subscribed. To see a different view or to filter the view by supplier click on the **Consortium Price Set Filter** and filter the view.

3. Locate the pricing to which you would like to subscribe. You can view an extract of the price set by clicking the extract link in the **Actions** column.

4. To subscribe to the pricing click the **subscribe to contract** link in the **Actions** column. You will be asked to confirm that you want to subscribe the contract. Click **OK**.

Configuration to Allow Negative Line Quantities

Overview

In some cases it is necessary for customers to use negative PO line quantities in their ERPs to handle pre-payments, returns and credits. By default, JAGGAER does not support negative line quantities on purchase orders. However, an **Allow Negative Quantities on POs and Invoices** setting is available that allows purchase orders to be created and updated with negative line quantities, which can then be received and matched to invoices. This allows customers to process invoices for orders created in the ERP that contain negative line quantities and amounts.

Related Permissions

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

How It Works

If the negative quantities feature is enabled:

- Negative quantities can be entered for line items on **purchase orders**.

- On **receipts**, negative quantities are already allowed as some customers use them for returns. Receipt Import and ADW Workflow rules related to receipts accommodate negative quantities on lines.

- On **invoices** negative quantities on lines work as follows:

- **When an invoice is created from a PO with negative quantities**, the system respects the negative values on the PO, and the resulting extended price, taxes and all totals update correctly, flowing from a PO with a negative quantity to an invoice.

- Negative quantities can be entered on **PO and non-PO invoices** when adding or editing lines.

  - Validation prevents users from submitting both negative quantity and negative unit price on any given line.

  - This applies to both buyer side and supplier portal invoices, for manual invoice creation and email invoices.

- On **Credit memos** negative quantities work as follows:

  - By default, when a credit memo is created from an invoice in JAGGAER, the unit prices on the invoice become negative because they represent a credit amount being returned to the buyer.

  - If the negative quantities feature is enabled, we do not allow negative values on *both* unit price and quantity. Instead, when a credit memo is created from an invoice that has negative quantities on a line, an error is displayed. To resolve the error, users may change the unit price or the quantity to a positive value. **Note:** Users must correct all the lines before saving or the error will continue to appear.

  - If users can create credit memos without an invoice (when configuration allows), they can enter negative quantities on a line.

Administrator Configuration

Contact JAGGAER to enable the **Allow Negative Quantities on POs and Invoices** organization setting and allow negative line quantities on purchase orders and invoices.

If the negative quantities setting is enabled, negative quantities can be entered on the following documents:

Purchase Orders

- Negative quantities can be entered for line items on **purchase orders**.

- If the setting is enabled, buyer invoices respect the setting **Allow Zero Quantity in the Cart, Non-Catalog and Forms** (under Setup > Configure Documents > General Document Configuration Settings). Supplier portal invoices do not respect this setting. This is existing functionality.

Invoices

- Creating an invoice from a PO with negative quantities respects the negative values on the PO, and the resulting extended price, taxes and all totals update correctly, flowing from a PO with a negative quantity to an invoice.

- Negative quantities can be entered on **PO and non-PO invoices** when adding or editing lines. Validation prevents users from submitting both negative quantity and negative unit price on any given line.

Credit Memos

- If the negative quantities feature is enabled, we do not allow negative values on both unit price and quantity. Instead, when a credit memo is created from an invoice that has negative quantities on a line, an error is displayed indicating that the price and quantity cannot both be negative values.

- If organization settings allow users to create credit memos without an invoice, they can enter negative quantities on a credit memo line.

Receipts

- On **receipts**, negative quantities are already allowed as some customers used them for returns. We have updated Receipt Import and ADW Workflow rules related to receipts to accommodate negative quantities on lines.

- The **Prevent Receipt Submission if Over Received** setting (Accounts Payable > AP Administration > Configure AP Settings) logic respects the intent of the setting even when negative quantities are in use with the Negative Line Quantities feature.

Integration Impact

The following imports and exports work as follows when the **Allow Negative Quantities on POs and Invoices** setting is enabled:

- **PO Create Import** and **PO Update Import** - Negative line item quantities are not allowed when the setting is OFF. Validation prevents PO import when unit price is negative with or without the setting enabled. This is existing functionality so PO lines cannot be created or updated with negative values for both price and quantity.

  Note: If a PO has a discount and the quantity is negative, then the discount will be positive. For example, if a PO extended price is $-154.00, and the discount 10%, then the discount will be positive ($15.40).

- **Create PO Export** - When purchase orders have negative line item quantities, those negative quantities properly display in the PO Export (Excel, CSV, and XML files). When other fields are affected by the negative quantities of line items (like Ext Price, Taxes, Shipping, and Handling), they are also displayed as negative values in the PO Export.

- **OCR/DMR Import** - When setting is enabled, a negative line item quantity can be included in Invoice Import XML. Negative value is imported and displays on Invoice UI. Extended Price reflects the negative quantity. Credit memos with negative quantities can also be imported via OCR/DMR.

- **Invoice Export** - When invoice line items have negative quantities, they will display correctly on Invoice Search exports (Excel, CSV, XML), Global Invoicing PDF, XML Invoice Export.

- **cXML Invoice Import** - Has been updated to accommodate negative quantities.

- **Receipt Import** - If the negative quantities setting is enabled, Receipt Import will not prevent negative quantities from being imported successfully. This is true regardless of the configuration on the **Handle required fields on Receipt import** setting (Setup > Configure Documents > General Document Configuration Settings) and it is allowed if the **Prevent Receipt Submission if Over Received** setting is enabled (Accounts Payable > AP Administration > Configure AP Settings). In this case, over-received validation displays in the UI after import.

Supplier Impact

If this feature is enabled, suppliers can enter negative quantities on **PO** and **non-PO invoices**.

Reporting in the Application

Overview

JAGGAER provides reporting tools to allow you to analyze and review spend activity that takes place in JAGGAER. Reporting data can be viewed via the application or exported for external usage. Reports are an excellent way to monitor the application's overall effectiveness and value. **Important!** These tasks focus on reports and data available to Administrators. Other types of historical or reporting data can also be found in the system through audit trails and various exports.

There are two primary places in the application that are used for reporting:

- **Document Search:** Users, approvers, and administrators can access requisition, order and invoice data using Document Search. In addition to viewing the information on the screen, the data can be exported for reference purposes or for import into external systems. In addition to standard export templates, organizations can create custom export templates that extract data in a manner specific to their reporting needs. For information about performing document searches, please see "Searching for Documents" and "Exporting Document Searches" in the **Site Essentials Handbook** or online searchable help.

- **Reporting Menu** (): The Reporting menu provides access to the various system reports available. Reports are organized in the following categories:

  - **Operational and Site Usage Reports** - Reports in this category are available to reflect how efficiently the application is being used. Cycle time reports allow you to view the length of time it takes for a requisition, PO, Invoice, etc. to cycle through workflow and identify areas for improvement. Usage reports tell you how your users are utilizing the application.

  - **Purchases and Spending Reports** - Reports in this category are available to evaluate spend in the application. Available reports include spend analysis, catalog reports, transaction reports, purchasing reports and more.

Related Permissions

- The **Transaction Reports** permission (**Permission Settings > Administration > System Administration**) is need to use the following reports: purchasing, spend analysis, spend dashboard, spend summary, cycle time, and invoice reports.

- The **Export Search Results** permission is needed to export your data. You must have the **Manage Company Exports** permission to view company-wide exports. These permissions are located in **Permission Settings > Orders > My Orders/Organization Orders**.

- The **Usage Reports** permission (**Permission Settings > Administration > System Administration**) is needed to use site usage reports.

See for information on eProcurement permissions.

Document Search

Exporting Purchasing Documents for Reporting Purposes with Document Search

Users have the option of exporting data after PO, PR, Receipt, Invoicing or Sales Order searches are performed using the Document Search feature. By performing searches and exporting the data, flexible, customized reporting data is available at any time.

You must have the **Export Search Results** permission to export your data. You must have the **Manage Company Exports** permission to view company-wide exports. These permissions are located in **Permission Settings > Orders > My Orders/Organization Orders**.

1. Perform a document search with the desired criteria. For detailed information about document search, please see "Searching for Documents" in the **Site Essentials Handbook** or online searchable help.

2. In the Filtered by area select the **Export Search** button.

3. Enter a filename and description for the export.

4. Select an export type:

    - **Screen Export** - Exports only the information available in the search results screen for each document. **Note:** If you are exporting a search with multiple document types you must select Screen Export.

    - **Transaction Export** - Exports an expanded set of information on the documents.

    - **Full Export** - Exports additional information in four zipped Microsoft Excel files.

    - **Custom Export Templates** - You or others in your organization may have created custom export templates. If any custom templates are available they will be listed below the standard templates.

5. Click the **Submit Request** button.

6. When the export is finished, the export file is available by navigating to **Documents > Document Search > Download Export Files**. Export files are zipped.

Operational and Site Usage Reports

Cycle Time Reports

The purpose of cycle time reports is to provide information regarding purchasing documents that have completed workflow within a specified time-frame. These reports provide insight into how long it takes documents to complete workflow to help identify areas for process improvements.

The reports organize the documents into cycle time "buckets" based on the number of days it took to complete the specified workflow (e.g. 0 days, 1 day, 30+ days etc.). For all of the reports, you can analyze documents based on a time-frame such as a day count or a fiscal year. For several of the reports, additional filter criteria is available that allows you to evaluate the data based on users, business units, departments and more.

You must have the **Transaction Reports** permission (**Permission Settings > Administration > System Administration**) to perform this task.

1. Go to **Reporting** ![icon] **> Operational and Site Usage Reports > Cycle Time Reports**. The **Operational Reports** screen displays.
2. Select the report to run. Information about each cycle time report option is below.

Time from PR submission to PR completion Report

This report shows the PRs that have completed the **Requisition** workflow within the specified number of days. It evaluates the PR submit date to the PR completion date.

1. Select **Time from PR submission to PR completion** link. The report displays. The **Time Distribution** bar chart on the left shows the number of requisitions that have completed workflow for each cycle time bucket. The **Summary** view on the right displays more detailed information about the cycle time buckets. Use the filter criteria at the top of the report to filter results.
2. To view requisitions for a particular cycle time bucket, click the bar that represents that bucket on the bar chart. To view a list of requisitions for the entire report, click the **Details** button located above the bar chart. The cycle time bucket is located in the **# of Days** field in the list.
3. To export the report, click the **Export** link in the top-right corner. To print it, click the **Print** link.

Time from Invoice Create to Invoice Export

This report analyzes how long it takes for an invoice document to go from being created to invoice export. In order to display in this report, an invoice must have completed workflow and have a status of **Paid** or **Payable**.

1. Select **Time from Invoice Create to Invoice Export** link. The **Time Distribution** chart on the left shows the number of invoices that have been submitted for each cycle time bucket in a bar-chart format. The **Invoice Source Type** chart on the right shows similar information in a pie chart. The legends located below the charts shows what each area of the chart represents. You can click on the item in the legend to remove it from the report display. The **Summary** view on the right displays more detailed information about the cycle time buckets. Use the filter criteria at the top of the report to filter results.
2. To view invoices for a particular cycle time bucket, click the bar that represents that bucket on the bar chart. To view a list of invoices for a particular invoice source, click the representing area on the pie chart. To view a list of invoices for the entire report, click the **Details** button located above the charts. The cycle time bucket is located in the **# of Days** field in the list.
3. To export the report, click the **Export** link in the top-right corner. To print it, click the **Print** link.

Time from Invoice Submit to Invoice Export

This report analyzes how long it takes for an invoice document to go from being submitted to being exported. In order to display in this report, an invoice must have completed workflow and have a status of **Paid** or **Payable**.

1. Select **Time from Invoice Submission to Invoice Export** link. The report displays. The **Time Distribution** chart on the left shows the number of invoices for each cycle time bucket in a bar-chart format. The **Invoice Source Type** chart on the right shows similar information in a pie chart. The legends located below the charts shows what each area of the chart represents. You can click on the item in the legend to remove it from the report display. The **Summary** view on the right displays more detailed information about the cycle time buckets. Use the filter criteria at the top of the report to filter results.
2. You view a list of the invoices in the report. To view invoices for a particular cycle time bucket, click the bar that represents that bucket on the Time Distribution chart. To view a list of invoices for a particular invoice source,

click the representing area on the pie chart. To view a list of invoices for the entire report, click the **Details** button located above the Time Distribution chart. The cycle time bucket is located in the **# of Days** field in the list.

3. To export the report, click the **Export** link in the top-right corner. To print it, click the **Print** link.

Time from PR Submission to Original PO Revision

This report shows a count of requisitions that have completed the PR to PO creation workflow within a specified number of days. Specifically, the report analyzes the time frame between PR submission date and original PO revision date, which is the date the PO was created.

1. Select **Time from PR submission to original PO revision** link.
2. The **Date Range Options** window displays. Select the date range you would like to analyze. Note that only documents completed by midnight on the day before you run the report will be included.
3. Select **Export**. Your report will be scheduled for processing. Processing time is dependent on the number of records.
4. When your export is complete, a link to the export file displays on the **Export Report Results** screen. There are two sheets in the file. Sheet 1 contains information in both a pie and bar chart. Sheet 2 contains the report details in a summary list. Fields include:

Time from PR Submission to Last PO Revision

This report shows a count of requisitions that have completed PR and PO workflow within a specified number of days. Specifically, the report analyzes the time frame between PR submission date and last PO revision date.

1. Select **Time from PR submission to last PO revision** link.
2. The **Date Range Options** window displays. Select the date range you would like to analyze. Note that only documents completed by midnight on the day before you run the report will be included.
3. Select **Export**. Your report will be scheduled for processing. Processing time is dependent on the number of records.
4. When your export is complete, a link to the export file displays on the **Export Report Results** screen. Click the link to open the report. There are two sheets in the file. Sheet 1 contains a pie chart. Each area of the pie represents a cycle time bucket. Sheet 2 contains the report details in a summary list.

Time from PR Submission to Invoice Export

This report shows a count of requisitions that have completed PR, PO and Invoice workflow within a specified number of days. Specifically, the report analyzes the time frame between PR submission date and Invoice Export to ERP date.

1. Select **Time from PR submission to last Invoice Export** link.
2. The **Date Range Options** window displays. Select the date range you would like to analyze. Note that only documents completed by midnight on the day before you run the report will be included.
3. Select **Export**. Your report will be scheduled for processing. The processing time is dependent on the number of records.
4. When your export is complete, a link to the export file displays on the **Export Report Results** screen. Click the link to open the report. There are two sheets in the file. Sheet 1 contains a pie chart. Each area of the pie represents a cycle time bucket. Sheet 2 contains the report details in a summary list.

Invoice Reports

These reports are applicable to organizations that do invoicing through JAGGAER. The purpose of the invoice reports is to provide insight into information regarding invoice documents that are being managed in the application. Reports include supplier reports, tolerance reports and matching reports. Additionally, most of the invoice reports can be viewed by the source by which they are entered in the system (manually, automatically, imported, etc.). This type of insight can help you identify areas for process improvements regarding invoice entry.

You must have the **Transaction Reports** permission (**Permission Settings > Administration > System Administration**) enabled to perform this task.

1. Go to **Reporting** ◫ **> Operational and Site Usage Reports > Invoice Reports**. The **Operational Reports** screen displays.

2. Select the report to run. Information about each invoice report option is below.

   - **Invoice Source Report** - This report shows provides information about the source of your invoices, source meaning how the invoice was entered into the system. For example, invoices can be recurring, entered manually, originate from a form request, etc. Understanding how invoices are being entered can help you to identity areas for improvement, particularly related to manual entry. Select the **Invoice Source** link to run this report.

- **Invoice Source By Supplier Report** - The Invoice Source by Supplier report gives your organization a view of invoices, by supplier, based on how they were entered. The report tells you how many invoices were automated, imported and entered manually. Presented as a table, this report allows the organization to see the count of each invoice source for each supplier. Click the **Invoice Source by Supplier** link to run this report. **Note:** This report can also be run if you have the **View Operational Reports** permission enabled to perform this task.

- **Invoice Tolerance by Source Report** - The Invoice Source by Tolerance report allows you to see the number of invoices received by source (Electronic, Manual, Invoice Import, Supplier Portal, Inventory Management and Automated) and see what the totals are for each match type (Exact Match, Outside Tolerance Above, Outside Tolerance Below, Within Tolerance, and Do Not Match). This report allows organizations to analyze invoice workflow rules to determine if updates can be made to reduce the need for manual intervention. Click the **Invoice Tolerance by Source** link.

3. The **Date Range Options** window displays. Select the date range you would like to analyze. When you select a date range you will get a report on all invoices that were completed within that time frame. Note that only invoices completed by midnight on the day before you run the report will be included. Invoices completed on the current day will not be in the report.

4. Select **Export**. Your report will be scheduled for processing. Note that, depending on the number or records that need to be retrieved, your report should be processed on the same day you run it.

5. When you click Export, you are taken to the **Export Report Results** screen. If you click away from the page before the export is complete, the path to navigate back is **Reporting** �ⅲ **> Reports Exports and Extracts > Download Report Export and Extract Files**. When your export is complete, a link to the export file displays. Click the link to open the report.

Site Usage Reports

The usage reports provide real-time information about how the organization is using the application. There are six reports, which include unique users (per day/month), total sessions (per day/month), total page views, and total hosted catalog searches. These reports may be useful for tracking metrics such as user adoption, trends in user activity, and specific functions performed by users. Additionally, it is possible to use them in conjunction with the real-time purchasing reports to determine like the number of searches per order.

Usage reports also offer the option to export report results into a .csv file.

You must have the **Usage Reports** permission (**Permission Settings > Administration > System Administration**) to perform this task.

1. Go to **Reporting** 📊 **> Operational and Site Usage Reports > Site Usage Reports**. The **Usage Reports** screen displays.

2. Select the **report type**. For a detailed explanation of each of the reports, refer to the Online Help.

3. From the **Date Range** drop-down list, select the time frame for the report data. Date options vary by report and include This Week/Last Week, This Month/Last Month, This Year/Last Year, and Select Date Range, which includes the calendar popup function to select specific start/stop dates.

4. Press the **Generate Report** button. The report data appears on the bottom of the screen. Review the report, print it, or export the data. Details:

   - At the top of each report is the report's name and the query date range:

   - The Print button appears at the top of each report, on the right. This button opens a printer-friendly view of the report.

   - The **Export CSV** button displays next to the **Printer Friendly** button; use it to save and manipulate the summary data in a .csv file.

Substitute History Report

The **Substitute History Report** contains substitute approval data. The export will contain a snapshot of current substitution assignments.

1. Navigate to **Reporting** 📊 **> Operational and Site Usage Reports > Substitute History Report**. The Site Substitution Report window displays.

2. Complete these fields:

   - **Approval Document** - Select an approval document type to report on. Options are All (default), PR, PO Invoices.

   - **Business Unit** - If your organization uses business units, select the business unit to report on. The report results will contain only those records available to the user running the report.

- **Departments** - Select the department to report on. The report results will contain only those records available to the user running the report.

- (optional) By default the generated report contains a snapshot of current substitution assignments. To select a specific date range for the report, select the **Use Date Range** checkbox and complete the **Start Date** and **End Date** fields.

> **Note:** If this option is selected, substitution assignments that ended prior to July 18th, 2022 will not be included in historical reporting.

- **Description** - Enter a description of the report.

3. Click **Export**.

Purchases and Spending Reports

Purchasing Reports

High-level purchasing reports provide real-time purchase requisition and purchase order data including category, supplier, and savings information. For organizations that do not create requisitions in the application, requisition report data includes all those carts that users have "completed" by returning them to the ERP system within the given time frame.

Note: For detailed purchasing information, you may want to view and export PR/PO data via the Document Search.

You must have the **Transaction Reports** permission (**Permission Settings > Administration > System Administration**) enabled to perform this task.

1. Go to **Reporting 📊 > Purchases and Spending Reports > Purchasing Reports**. The **Purchasing Report** screen displays.

2. In the **Report type** field, make a selection from the drop-down options. There are three general types of reports from which to choose. General information is below, but you can also click on the **?** in the top-right corner or the **Purchasing Reports** area for a description of each specific report.

   - **Dashboard** - The dashboard report provides purchasing data regarding the total number of purchasing documents (PO/PR), line items and total spend; it also defines many of them as percentages of the whole. The report provides a breakdown of an organization's spending across catalog, punch-out and non catalog suppliers.

- **Purchase Order Reports** - These reports detail purchase orders that have completed workflow (if any). Among others, these include supplier, category, and savings reports.

- **Purchase Requisition Reports** - The data in these reports include requisition and cart data. For organizations that place orders through JAGGAER, the report reflects PRs that have completed requisition workflow. For organizations who place orders outside of the application, the report reflects data from submitted carts.

3. Use the **Date Range** drop-down list box to select the time frame for the report data.

4. Click the **Generate Report** button. The report data displays on the bottom of the screen. The top of each report contains the name and the query date range. Selecting the Print button launches a printer friendly version of each report. Use the Export CSV button to export report results into .csv file. **Note:** The Export CSV button is not available for Dashboard reports.

Spend Dashboard Report

The Spend Dashboard report gives you transparency into two types of information; organizational spend as a whole and the top items being purchased by your organization.

You must have the **Transaction Reports** permission (**Permission Settings > Administration > System Administration**) enabled to perform this task.

1. Go to **Reporting** ▥ **> Purchases and Spending Reports > Spend Dashboard**. The Dashboard displays. Additional details:

- The **Organizational Spend** report displays catalog and non-catalog spend based on the selected filters.

- The **Top Items Purchased** report displays the top 10 items purchased based on the selected filters.

- Click on the **Show Filters** link (located above the report) to view the current filters for the report. To change the filters, click the **Maximize** link located above the report. This will expand the report to full screen and display filter options. Change the filter options to change the data on which the report is based.

- The report displays as a chart by default. While in full-screen view, you can change the display to detailed list by clicking on the **Details** button.

- Select the **Export** link to export the report or the **Print** link (both located in the top-right of the screen) to open a printable copy of the report.

- To return to the dashboard view, click the **Return to Dashboard** link.

- You can drill down into the bar information in both the dashboard and full-screen views of the report by clicking on the bars in the chart. A legend displays below the Organizational Spend report that describes what each bar color or point represents.

Spend Summary Reports

Spend summary reports provide detailed information about spend. They provide a breakdown of spending across catalog and non-catalog spend and suppliers. Spend analysis is performed by date range, document type, and can also be viewed by business unit. Spend reports can be run on the organization level, the supplier level or the item level.

You must have the **Transaction Reports** permission (**Permission Settings > Administration > System Administration**) enabled to perform this task.

1. Go to **Reporting** ▥ **> Purchases and Spending Reports > Spend Summary Reports**. The **Spend Summary Reports** screen displays.
2. Select the report to run. Information about each spend summary report option is below.

Organization Spend Summary Report

This option displays the spend summary for the entire organization.

1. Select **Organization** from the **Spend By** drop-down field.
2. You can choose to display the report for requisitions or purchase orders. Select the appropriate option from the **Document Type** drop-down field.
3. Use the **Date Range** drop-down field to select the time frame for the report data.
4. If your organization has multiple business units you can choose to report the data for a specific BU. To do this, select an option from the **Business Unit** drop-down field.
5. Click the **Apply** button. The report data displays. Information displayed in the report includes:

   - Pie-chart showing overall spend for catalog vs. non-catalog suppliers.

- Table containing summary details of catalog vs. non-catalog suppliers including number of suppliers, number of orders, dollar amount and percentage of orders. **Select the Spend for Catalog Suppliers** or **Spend for Non-Catalog Suppliers** link to drill down to information about catalog suppliers.
- Detailed breakdown of spend by catalog and non-catalog suppliers Information includes total spend, orders per product type, number of order lines, average spend per line and average lines per product type.

Supplier Spend Summary Report

The Spend-by Supplier view will give you information about your company's spend by supplier. The report contains information about each supplier such as number of orders and order lines, average spend per order and per order line and total spend. The report also contains a bar chart showing Top 10 or Bottom 10 suppliers, depending on how you have your results configured (highest to lowest vs. lowest to highest).

1. Select **Supplier** from the **Spend By** drop-down field.
2. You can choose to display the report for requisitions or purchase orders. Select the appropriate option from the **Document Type** drop-down field.
3. Enter a supplier name in the **Supplier** field. As you type, the field will display matching supplier names. Select the correct supplier.
4. Use the **Date Range** drop-down field to select the time frame for the report data.
5. If your organization has multiple business units you can choose to report the data for a specific BU. To do this, select an option from the **Business Unit** drop-down field.
6. Click the **Apply** button. The report data displays. Information about the report:

   - Bar chart of Top 10 suppliers. By default the Supplier Spend Summary report will display suppliers from highest to lowest total spend and the 10 suppliers will appear in the bar chart. You also have the ability to display the report from lowest to highest by selecting the Spend Total column header. When the report is displayed in this order the bottom 10 suppliers will appear in the bar chart.
   - Table containing summary details of the report results including number of unique suppliers, total spend, number of orders, average spend per order, number of order lines and average spend per line.

- Detailed information for each unique supplier including number of orders, number of order lines, average spend per order, average spend per line and total spend. Click on the supplier name to drill down to an Item Spend Summary report for that supplier.

Item Spend Summary Report

The Spend-by Item view will give you information about the top 50 items purchased by your organization from a specific supplier. Information includes part number, product description, packaging, size and quantity, as well as total and average spend per item.

1. Select **Item** from the **Spend By** drop-down field.
2. You can choose to display the report for requisitions or purchase orders. Select the appropriate option from the **Document Type** drop-down field.
3. Enter a supplier name in the **Supplier** field. As you type, the field will display matching supplier names. Select the correct supplier.
4. Use the **Date Range** drop-down field to select the time frame for the report data.
5. If your organization has multiple business units you can choose to report the data for a specific BU. To do this, select an option from the **Business Unit** drop-down field.
6. Click the **Apply** button. The report data displays. The Spend-by Item view will give you information about the top 50 items purchased by your organization from a specific supplier. Information includes part number, product description, packaging, size and quantity, as well as total and average spend per item.

Spend Analysis Reports

JAGGAER bases the Spend Analysis Reports on the Consumer Price Index (CPI) model. These reports compare spend across two periods in time with regards to preferred and non-preferred vendors, spend by category, and savings estimates by category. There are reports for both purchase requisitions and purchase orders.

You must have the **Transaction Reports** permission (**Permission Settings > Administration > System Administration**) enabled to perform this task.

1. Go to **Reporting** ![icon] **> Purchases and Spending Reports > Spend Analysis Reports**. The **Spend Directing Analysis** screen displays.

2. In the **Report type** field, make a selection from the drop-down options. Click on the **?** in the top-right corner or the **Spend Analysis Reports** area for a description of each specific report.

3. Select the reference and analysis periods from the **Date Range** drop-down list.

4. Click the **Generate Report** button. The report data displays on the bottom of the screen. The top of each report contains the name and the query date range. Selecting the Print button launches a printer friendly version of each report. Use the Export CSV button to export report results into .csv file. **Note:** The Export CSV button is not available for Dashboard reports.

Troubleshooting Tools

Overview

Troubleshooting tools are available to administrators. The tools discussed here include a way to troubleshoot cart return message for eProcurement customers, along with managing PO and Invoice export failures through the GUI.

Related Permissions

- The **Manage Integration Export Failures** permission (**Permission Settings > Administration > System Administration**) is needed to manage purchasing document export and workflow errors.

- The **System Configuration** permission (**Permission Settings > Administration > System Administration**) is needed troubleshoot cart return messages.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Managing Purchasing Document Export Errors

Functionality is available that allows customers and/or JAGGAER Customer Support to manage PR, PO and Invoice export errors. This functionality allows administrators to easily manage export failures through the application interface. At a high level, this feature allows organizations to

search for an export failure and assign the failed documents to be resent with the next scheduled batch export. In addition, the export can be run immediately so that all pending status queue entries will export.

You must have the **Manage Integration Export Failures** permission (**Permission Settings > Administration > System Administration**) to perform this task.

1. Go to **Administer** ⚙ **> Find and Fix Errors**.

2. Select the document type from the menu options: **Requisition Export Errors**, **PO Export Errors** or **Invoice Export Errors**.

3. By default, all export errors display on the screen. You can select a specific status or connection to narrow the results displayed:

   - **Status** - Select the status of the export errors you are searching for from the drop-down options. Select *Pending* to view export errors that have been reviewed and are set to be re-exported with the next scheduled batch export. Select *Error* to view errors that have not been reviewed.

   - **Connection** - If your organization has multiple exports for the document type, each of the "connections" will be drop-down options in this field. Select the appropriate connection to view errors only related to that export instance.

4. When you have the correct list of documents that failed to export, you can take action on the documents. Locate the document(s) in the list and click the **Select** checkbox.

5. Choose an option in the **For selected line items** drop-down field. The following actions are available:

   - **Requeue Exports** - Choose this option to resend the document. The document will move to a *Pending* status and by default, will be sent with the next scheduled batch export.

   - **Run Exports** - Select this option to send the failed document immediately. This option is only available for documents that are set as *Pending*.

   - **Remove from Queue** - Select this option if the document should not be resent. This removes the order from the queue.

6. After you have selected the correct option, click **Go**.

7. If you selected **requeue exports** or **remove from queue**, you are prompted to enter a **note**. It is recommended to enter details about the re-send for reference later. This information is captured in document history.

Managing PO and Invoice Export Failures

Functionality is available that allows customers and/or JAGGAER Customer Support to manage **PO Export and Invoice Export** failures. This functionality allows administrators to easily manage export failures through the application interface. At a high level, this feature allows organizations to:

- Search for a PO or Invoice export failure notification.

- Assign a "failed" order or invoice to be resent with the next scheduled batch export.

- If needed, run the export immediately so that all the pending status queue entries will export.

- Receive notifications when a PO or Invoice failures occur.

> **Note:** This feature is only applicable to those organizations with BATCH PO and/or Invoice exports.

Example Scenarios

To provide a better understanding of the feature, a few sample scenarios are described below, providing insight of "when" and "why" your organization may benefit from this functionality.

- **PO cannot be found in ERP system.** A customer has realized that a PO they expected to be in their ERP system is not there. With the export queue functionality, an administrator can now see if the order was sent successfully, and if not, they can resend the order to the ERP system.

- **Responding to Notifications for failed PO or Invoice Exports.** An administrator receives a notification that a PO or invoice failed to export. The administrator would then go to the Export Queue to evaluate the export status. If it is determined that the PO or invoice is not available in the ERP system, it can be re queued and notes on the transaction captured. By default, after a document is re queued, the status remains as pending until the next export occurs, but you can also choose to export immediately. Lastly, you can choose to not re-export the PO/invoice and remove the notification.

PO Workflow Error Queue

The PO Workflow Error queue allows organizations to monitor purchase order workflow distribution errors related to revision documents.

Purchase Order Workflow Errors

If there are errors on the revise and/or distribution steps in the PO approval workflow, the PO is set to an error state, a notification is sent to the administrator (who has the notifications listed above enabled), and the document is displayed on the PO Workflow Error queue, where administrators have the option to restart, skip or cancel the purchase order.

The **Manage Integration Export Failures** permission (Permission Settings > Administration > System Administration) permission is needed to perform this task.

To resolve issues in the Purchase Order Workflow Errors page:

1. Navigate to **Administer** ⊞ **> Find and Fix Errors > Purchase Order Workflow Errors**. A list of purchase orders that have errors on the Revise or Distribution steps in the PO approval workflow are displayed. These errors are primarily due to missing revision documents.

2. Click the **Restart**, **Skip** or **Cancel** option next to individual documents, or select multiple documents and choose an option from the **Action for selected Items** drop down.

Purchase Order Distribution Errors

The **Purchase Order Distribution Errors** queue in the **Find and Fix Errors** menu that allows customers to view PO email distribution errors and re-send them.

1. Navigate to **Administer** ⊞ **> Find and Fix Errors > Purchase Order Distribution Errors**.

2. In the **Filters** panel, select **Bounced Back E-mail Failure** to view a list of PO distribution emails that were unsuccessful, then click **Search**.

- The system checks once every hour for failed emails.

- The Reason column will indicate that the **Email is returned undelivered.**

3. To re-send a failed email:

    a. Select the checkbox next to each PO you want to re-send to the supplier via email.

    b. In the **action** menu, select **Queue to Resend to Supplier via Email**, then click **Go**

    c. Complete fields in the overlay and click **Save**.

Best Practices

Best practice is for administrators to re-send failed emails within 24 hours of the error appearing on the Find and Fix Errors page, and to use the comments available on the Resend overlay to provide additional information in the PO History. Emails re-sent after 24 hours will have additional limitations as noted below.

- For errors processed **within 24 hours** the following will take place:

  - The log will clear from the Find and Fix Errors page on a re-send.

  - An entry in the PO History records that the order was re-sent.

  - If the email distribution method or email address that is selected on a re-sent order differs from the one selected on the original order, those changes will NOT be noted in the PO History. Use the comments when re-sending to record this information.

  - If the re-send fails, the Find and Fix Errors page will have a new entry that displays the email used for the re-send. The email distribution method will default to the method selected on the original distribution.

- Errors that have been listed for **more than 24 hours** on the Find and Fix Errors page are processed as follows:

  - PO's that are re-sent after 24 hours will process as usual from the Find and Fix Errors page (i.e., the log is cleared from the Find and Fix Errors page and an entry is recorded in the PO History).

  - However, if the re-send also fails, there will *not* be another entry on the Find and Fix Errors page. This failure will require intervention by support. Contact JAGGAER if this occurs.

Notification Preferences

Users with the following notification preferences enabled will automatically receive an email notifying them if a PO sent via email was not delivered. Users need the **Manage Order Failure Notifications** permission (Permission Settings > Orders > My Orders/Organization Orders) to see these notification preferences:

- **Notification Preferences > Administration & Integration**

  - **Prepared By - PO Distribution Failure Notice**

  - **PO Distribution Failure Notice**

  - **PO Distribution Failure Notice By Business Unit**

Troubleshooting Cart Return Messages

This task is only valid for eProcurement customers that send their carts to a third-party system for processing, such as Oracle or Ariba. Administrators can view a returned cart message or create a message on the fly. Cart messages are stored in the system for **two weeks**.

You must have the **System Configuration** permission (**Permission Settings > Administration > System Administration**) to perform this task.

1. To access this functionality, open the cart/requisition (via PR Document Search).

2. From the cart/req, a link is available that says **View Cart**.

3. Once the view carts link is selected, a pop-up window will open with the following options:

   - At the top, Administrators can view each cart return that was returned to the third-party system by clicking on the **Cart Message link(s).**

   - At the bottom Administrators can click **Generate Cart** to view the cart return data that would be generated for this PR based on current data and configurations (**Note:** performing this action does not actually return a new cart; it only displays what the cart return would look like). This data may differ from the actual cart return messages that were returned due to configurations changes such as UOM mapping, price changes, etc.

4. If **Generate Cart** is selected, the associated message displays.

Category Management & Mapping

Product Category Management and Mapping

Categories

Each product or item in a hosted catalog belongs to a **category** in JAGGAER's category hierarchy. By assigning all items a category, the application can perform cross-supplier searching and consistency amongst similar products. The JAGGAER taxonomy primarily includes UN/SPSC codes with additional categorization for scientific items using JAGGAER's internally developed catalog hierarchy.

Category Management allows administrators to control which products are available to users by turning categories on and off at an organization or supplier-specific level. This article demonstrates the basics of Category Management, as well as how to establish supplier and category preferences, which determines the products that display first in search results. The article also addresses attribute mapping, which allows organizations to use codes familiar to them in the JAGGAER application.

Related Permissions

The **Catalog Management** permission (Permission Settings > Administration > Catalog Administration) is needed to configure UN/SPSC settings, activate or inactivate categories, and enable commodity code/category mapping.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Configuring UN/SPSC Settings

The application allows system administrators to control features related to formatting and viewability of UN/SPSC . In most cases, these settings will be set up during your implementation and will only be updated on an as-needed basis.

You must have the **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) to perform this task.

1. Navigate to **Setup** ⊡ **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets**.

2. Expand **Default Mapping** in the left menu and click the **UN/SPSC** sub-menu item. Configuration options display on the right.

3. Configure the options as needed:

   - **UN/SPSC Masking Format** - Make a selection from the drop-down options to specify how many segments of the code should be shown in the JAGGAER system. Some organizations only want the first two segments, in which case zeros are sent for the final two segments.

   - **UN/SPSC Separator** - Make a selection from the drop-down options to identify the separator to be displayed between segments. This is important for integration, since some systems require a specific segment separator or none at all.

   - **Apply to UN/SPSC Integration Value** - This checkbox should be enabled to apply the above settings to the integration messages, e.g., cart return, PO, etc.

   - **Apply to Commodity Code Value** - This checkbox should be enabled to apply the above settings to the populated commodity code field in the shopping cart. Note: This option is only valid if Commodity Code mapping is being used.

4. Click **Save Changes**.

Activating/Inactivating Categories

By default, all categories are active in the application. Categories can be made inactive at the organization level. When a category is inactivated, users cannot order from items within the category and they do not display in the product search results. An entire parent category can be inactivated, thereby inactivating all child categories, or individual child categories can be inactivated.

You must have the **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) to perform this task.

1. Go to **Setup** **> Hosted Catalog and Ordering Configuration > Manage Product Categories**.

2. Active top-level categories are indicated by the ☑ in the **Global Toggle** column and the **Result (on/off)** column. If a top-level category is not active, this is indicated by the ☒. To change the status of a top-level category, click the icon in the **Global Toggle** column. **Remember that inactivating a top-level category will also inactive all child categories**.

3. To change the status of a child category, click the **+** to the left of the appropriate top-level category. Browse until you locate the appropriate child category. Active child categories are indicated by the ✅ in the **Result (on/off)** column and the ⬆ in the **Global Toggle** column (the blue arrow indicates that the status is inherited). If a child category is not active, this is indicated by a red x ☒. To change the status of the child category, click the icon in the **Global Toggle** column. If the child category has it's own child categories, the status will be changed for them as well.

4. Category changes are effective upon selecting the toggled value. There is no Save action on the page.

Managing Category Visibility and Preference by Supplier

You can also activate and inactivate categories for specific suppliers, as well as set a preference for supplier categories to appear in search results. See "Supplier Category Preferred Positioning" in the online searchable help for more information.

Enabling Commodity Code/Category Mapping

In the JAGGAER application, hosted and punchout items are assigned a classification based on UN/SPSC categories. However, it's possible that an organization may be required to use a different commodity code classification system. Organization commodity codes can be mapped to those used by JAGGAER and JAGGAER suppliers. The mapping functionality allows you to

"match" each of the JAGGAER categories with one or more of your commodity codes. By setting up the mapping, the commodity code field is auto-populated with the correct commodity code and this information.

You must have the **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) to perform this task.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets**.

2. Expand **Default Mapping** in the left menu and click the **Commodity Code** sub-menu item. Configuration options display on the right.

3. Click the **Select to use category mapping functionality** checkbox (the first setting on the page). Once this checkbox is enabled, the Mapping Values section displays on the page.

4. Enable the **Select to use Commodity Code Type functionality** checkbox if your organization uses tax integration and would like to pass a Products or Services value as the type of commodity code for each product on an invoice.

5. In the **Mapping Values** section, select the **Mapping Type**. The selection determines what is auto-populated the Commodity Code field on the Shopping Cart.

   - **Category Name** - Select this option to display the text name of the UN/SPSC category in the commodity code field. (not frequently used). **Note:** This option does not use inheritance for mappings, i.e., child categories do not inherit their parent's mapping value, and each category mapping must be explicitly overridden.

   - **Category (UN/SPSC)** - Select this option to display the category number from JAGGAER's taxonomy in the commodity code field (not frequently used). **Note:** This option does not use inheritance for mappings, i.e., child categories do not inherit their parent's mapping value, and each category mapping must be explicitly overridden.

   - **Free Form Value** - Select this value if you want to manually enter the "matching" commodity codes for each of JAGGAER's categories. This option is not recommended in most cases due to the risk of manual error – there are no "checks" for spelling, etc.

   - **Value List** - Select this option if you want to map the JAGGAER categories from a defined list of codes from your organization. This option is most frequently used and the most fool-proof because it guarantees that the correct spelling of values is used. When selecting this option, you can manually enter the list of your organization's commodity codes or import the list via the interface.

6. Configure options in the **Commodity Code Field Parameters** section. For information about each field, mouse over the field name or click the **?** in the upper right corner for field help.

7. Click **Save**.

Configure Commodity Code Tree Structure

By default commodity codes in our system use a 'flat' search format, where users search for commodity codes by entering at least part of a commodity code number or definition. To search efficiently, users need to already know a little of what they are looking for.

A **commodity code tree structure** can be imported into the system that allows customers to transform their flat commodity code structure into a hierarchical one. Customers can import the hierarchical classification structure that they want to use for commodity codes into the application. The commodity code tree search is available in Shopping Advanced Search, and on requisitions, purchase orders, change requests and invoices. This is available in the New shopping experience, New PO experience and New invoice experience views only. Users can drill down through an organization's classification system, or enter a commodity code number or description in the Commodity Code search field to find the commodity codes they are looking for.

The commodity code tree structure setting must first be enabled and then the structure is imported.

1. Enable the commodity code tree structure setting.

   a. Navigate to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets > Commodity Code > Configuration**.

   b. In the left menu, expand a taxonomy set and select the **Commodity Code** subheading.

   c. In the right panel, click the **Configuration** tab.

   d. Select the **Use group level tree for commodity codes** checkbox.

   e. Click **Save Changes**.

   > **Note:** This setting controls the visibility of the tree structure only and does not affect other imports and exports related to commodity codes.

   > **Note:** Once the commodity code tree structure has been imported, this setting works as a toggle. It can be disabled to return to default commodity code settings, or turned back on again to make the commodity code tree structure available in the application.

2. Upload a commodity code tree structure via Import/Export. Commodity codes must already exist in the system to create a commodity code tree:

> **Note:** There is no template for commodity code tree structure imports. Users must first perform an export, make edits within the Excel file and import the file again. Every import replaces the entire commodity code tree structure.

   a. Navigate to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets**.

   b. In the left menu, expand a taxonomy set and select the **Commodity Code** subheading.

   c. In the right panel, click the **Import/Export** tab.

   d. In the Request panel, expand the **Type** field and select the new **Commodity Group Levels** option.

   e. Perform an initial export and complete the downloaded Excel file.

      - The exported file contains a Commodity Code Value column and Group Level Name 1, 2, 3, 4 columns. The initial export will list all existing commodity code values and blank Group Level Name columns. Each Group Level Name column represents a level in the commodity code tree structure, up to four levels.

      - For each commodity code, enter where it lands in the commodity code tree structure by entering the name of the top level and sub-levels in the Group Level Name columns.

      - At least one Group Level Name is required for a commodity code to appear in the tree structure, but not all Group Level Name columns need to be completed. However, if you enter the name of a sub-level, it must be added to all commodity codes that use the same parent level.

      - Levels must be completed sequentially, i.e., users cannot enter a level 1 group, skip level 2 and populate level 3.

   f. Validate and import the completed Excel file.

If the codes have imported successfully, the imported commodity code tree structure is immediately available in the **Commodity Code** field in Shopping Advanced Search, and on requisitions, purchase orders, change requests and invoices. This is available in the New shopping experience, New PO experience and New invoice experience views only. Users can search by commodity code using the tree structure.

Manage Commodity Codes

Overview

The system provides a quick way to manage your organization's list of commodity codes through the interface. This is only needed for those organizations that choose to map their own commodity structure with the JAGGAER categories. The first step to doing so is to enter the organization commodity codes into the JAGGAER application. This task can be accomplished manually or via import. Typically, you will want to import the list the first time, but occasionally you may want to add commodity codes manually.

Related Permissions

The **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) is needed to perform these tasks.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Commodity Code Translations

Customers can provide translations for each of their Commodity Code values and descriptions, so that organization users can see translated text when viewing the values associated with a supplier's profile. Suppliers accessing your organization commodity code list via the Customer Branded Portal (if configured for your organization) will also see translated text. The import and export of commodity code values also supports including translations.

> **Note:** Commodity Code translations can be managed by any customer with the JAGGAER ONE eProcurement solution. Customer Branded Portals can be configured by customers with any of the following solutions: Supplier Management, Invoicing, Sourcing, Contracts+.

Commodity Code Translations are managed via the **Commodity Translations** page. The organization list of Commodity Codes and Descriptions are displayed. Users can search by Commodity Code or Description to find a particular value to translate. Select the **Edit** button for the Commodity Code or Description you would like to translate. In the overlay, select the language and enter the translation text. The languages available are determined by the organization settings.

Importing and Exporting Commodity Code Values and Translations

You can add, remove and edit Commodity Code values as well as Translations in bulk via an Excel file, rather than managing individually in the user interface. You can also export values and translations for review and use in editing. Select the Import/Export tab and choose the type of file and action.

You can import Commodity Code values by using:

- A blank template - Select to download the **Commodity Code CSV Template** on the Import/Export page.

- An exported file of existing commodity codes.

Open the **Commodity Code values** export file or template using Microsoft Excel and enter or update the information. **Note:** There are a number of columns in the system. You cannot move or delete any of these columns, but they can be hidden while you are making edits:

- **Commodity Code Value** - This is the current value for the commodity code in the system. No changes should be made to this column. **Note:** If you delete a row from this column, this does not mean it will remain in the JAGGAER site.

- **New Value** - Enter a new value for the commodity code if you would like to edit the value. You can also add a NEW commodity code by leaving the commodity code value blank and entering a value in the New Value field.

- **Commodity Code Description** - You may choose to enter or edit the current commodity code description. This is an optional field. It may be helpful if the person selecting a commodity code is not familiar with the code values. You can also choose to display the description with the code values. The description is searchable when searching for commodity code values.

- **Active** - Indicates if the Commodity Code is active (TRUE) or not (FALSE).

- **Tax Flag Value** - Use this field to assign a taxable status to an item associated with this commodity code.

  - **N/A** - No taxable status is associated with this value. This is the default value for all commodity codes, If you do not want to indicate a taxable status, you do not need to make changes to this value. When this value is applied, the taxable flag will not change for an item based on a commodity code with this Taxable Flag value.

  - **Tax Applies** - Tax applies to an item with this commodity code. The Taxable flag on a document will be set to True for items with the associated commodity code.

  - **Tax Exempt** - Tax does not apply to an item with this commodity code. The Taxable flag on a document will be set to False for items with the associated commodity code.

- **Custom Field Settings** - If you have selected to map a custom field to your commodity codes, the Custom Field, available values, and default value are listed in separate columns. These columns are only present for organizations who have set the option to map the commodity code to a custom field. See the Mapping Custom Field Values to Commodity Codes (Defined List) for details.

- **Type** - If your organization shops in the application, you have the option of enabling Commodity Code Type functionality. The default value is None, and you can choose Products or Services as a value for the commodity code. This value can be used in workflow, as well as in tax integration messages.

There is no template for **Commodity Code translations**. You must first perform an export and make edits within the Excel file before importing. The file contains a Commodity Code and Commodity Description worksheet. The fields are as follows:

- **Identifier (read only)** - This is the internal system code used to identify the commodity code. The column is read-only and you should not make changes to the values in this column.

- **Default (read only)** - This column lists the default language content for the commodity code. If no translations are provided, this is what all users will see, regardless of their language selection.

Language options per column - Each remaining column is a language supported by the organization. Enter the translated content for the code or description in the appropriate language column.

> **Note:** From the **Import/Export** page you can also manage **Category Mapping** via import and export. Download the Category Mapping Import Instructions provided on the Import/Export page for additional details.

Commodity Code Tasks

You must have the **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) to perform these tasks.

Update an Existing Commodity Code

1. Navigate to **Setup** 🔧 **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets**.

2. Expand **Default Mapping** on the menu on the left and click the **Commodity Code** sub-menu item. Configuration options display on the right.

3. Click the **Manage Category/Commodity List** tab.

4. Locate the commodity code in the list. You can scroll through the list or search for a specific commodity code using the search feature.

5. Click on the code. Configuration fields display on the right.

6. Make the appropriate updates. **Important:** Updates cannot be made to commodity codes that have associated workflow rules or mappings.

7. Click **Save Changes**.

Create a New Commodity Code

1. Navigate to **Setup** 🔧 **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets**.

2. Expand **Default Mapping** on the menu on the left and click the **Commodity Code** sub-menu item. Configuration options display on the right.

3. Click the **Manage Category/Commodity List** tab.

4. Click the **Create New Commodity Code** button.

5. Click on the code. Configuration fields display on the right.

6. Enter the appropriate information. For information about each configuration field, click the **?** to access help text.

7. Click **Save Changes**.

Provide Translations for Commodity Codes

1. Navigate to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets**.

2. Expand **Default Mapping** on the menu on the left and click the **Commodity Code** sub-menu item. Configuration options display on the right.

3. Click the **Manage Category/Commodity List** tab.

4. Click on the **Commodity Translations** tab.

5. Locate the commodity code in the list. You can scroll through the list or search for a specific commodity code using the search feature.

6. Click the **Edit** button for the Commodity Code or Description to translate. An overlay displays.

7. Select the language for which you want to translate the code or description. A text box expands for the selected language. Enter the appropriate translation.

8. Once you have selected and entered content for each of the desired languages, click Save.

9. The page refreshes, and any configured languages will display for the appropriate row.

Export Commodity Code Values or Commodity Translations

1. Navigate to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets**.

2. Expand **Default Mapping** on the menu on the left and click the **Commodity Code** sub-menu item. Configuration options display on the right.

3. Click the **Manage Category/Commodity List** tab.

4. Click on the **Import/Export** tab.

5. Under the **Request** section, select the **Type** of export.

   - To export commodity code values, choose **Commodity Values**.

   - To export commodity code translations, choose **Commodity Translations**.

6. In the **Action** dropdown, choose **Export**.

7. Enter a **Description** for the export.

8. Click **Submit**.

9. When the export is completed, the file will be accessible in the **Recent Activity** on the right. You may need to click the **Refresh the Screen** link in the upper right to see an updated status of the export request.

Import Commodity Code Values or Commodity Translations

For this task, it is assumed you have created a file for import by populating the **Commodity Code CSV Template** or by updating a **Commodity Code Values** export file.

1. Navigate to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets**.

2. Expand **Default Mapping** on the menu on the left and click the **Commodity Code** sub-menu item. Configuration options display on the right.

3. Click the **Manage Category/Commodity List** tab.

4. Click on the **Import/Export** tab.

5. Under the **Request** section, select the **Type** of validation or import file.

   - To update commodity code values, choose **Commodity Values**.

   - To update commodity code translations, choose **Commodity Translations.**

6. Choose the **Action**:

- **Validate** - You may choose to Validate the file only. This will analyze the file for any errors and provide a file with errors and warnings. After validation is complete, you have the option of importing information that did not error.

- **Import** - You may choose to Import the file without validation. If there are no errors or warnings associated with the import, no Errors/Warnings file is provided.

7. Enter a **Description** - The Description field is required. Enter text that describes the type of validation or import you are performing.

8. Browse and choose the **File Name** - Select the file name with the information you need to import.

9. Open the export file or template using Microsoft Excel and enter or update the information. **Note:** There are a number of columns in the system. You cannot move or delete any of these columns, but they can be hidden while you are working.

10. Click **Submit**.

11. The page will refresh, and you will note that your requesting is "Pending" in the **Recent Activity** section of the Import/Export tab. Choose the **Refresh this Page** link to refresh the screen and view the status of your request until you see it is Completed.

12. If you chose to Validate the import file, you will note a Validation file is created noting any rows with errors, warnings or duplicates. Click the file to open and review any errors that you may want to correct and then re-validate the file. If you would like to import the file you validated (the information that did not error or generate a warning), choose the **Click to import…** link to import the file. The data that contained errors, warnings or duplicates will not be included in the import.

13. If you chose to Import the file without first validating, you will see the validation file link only if errors or warnings were identified during the import process. If no errors or warnings were detected, no validation file is generated.

14. Once you see that the Import has a status of **Completed**, the commodity values or translations have been updated.

Custom Field Settings - If you have selected to map a custom field to your commodity codes, the Custom Field, available values, and default value are listed in separate columns. These columns are only present for organizations who have set the option to map the commodity code to a custom field. See Mapping Commodity Codes for details.

Mapping Commodity Codes

Overview

Commodity codes can be mapped to system categories, custom field values (defined list or free form) and in shopping cart results.

Related Permissions

The **Catalog Management** permission (Permission Settings > Administration > Catalog Administration) is needed to perform these tasks.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Mapping Commodity Codes to System Categories

Commodity codes can be mapped in the UI or via an import file.

You must have the **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) to perform this task.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets**.

2. Expand **Default Mapping** in the left menu and click the **Commodity Code** sub-menu item. Configuration screens display on the right.

3. Click on the **Category Map** tab. The categories display.

4. To expand the categories, select the ⊞ icon next to the parent category name.

5. Locate the categories for mapping and click the **Select** checkbox for each one. **Note:** Mappings do not inherit. You must select each category to map to a single commodity code. For example, if you would like all of the categories under "Office Supplies" to be mapped to the same commodity code, you must expand the Office Supplies category and select each child category to map.

6. Select the checkbox to the right of each category name to map.

7. In the **Selected Category Actions** drop-down field (located on the right above the commodity code list) select the *Modify Commodity Code* option.

8. The **Modify Commodity Code** overlay displays. Enter the new commodity code value.

9. Click **Save Changes**. The values will show in the **Commodity Code** column for the categories, and a check mark will display in the **Value Overridden** column.

To remove a mapped commodity code from a category, select the category and choose **Reset Value** in the **For the selected categories** drop-down, and select **Go**. To reset all values, select **Reset All** in the **For the selected categories** drop-down.

Importing Category Mapping

Instructions for importing the commodity code mappings are available on the **Import/Export** tab. Select **Click to view category mapping import instructions** to download or view the guide.

Mapping Custom Field Values to Commodity Codes (Defined List)

If commodity codes are configured to be mapped using a Value List, a custom field value or list of values can be mapped to specific commodity codes. When values have been mapped to a commodity code, cart items associated with that code automatically populate or display the mapped values. If a single value is mapped, the value will automatically be considered the default value. If multiple values are mapped, one of the values can be selected as the default. This is not mandatory. If a default value is not defined, users will have the opportunity to select the appropriate value from all mapped values for the commodity code.

To be valid for mapping to a commodity, a custom field must be a header/line or line-level only field. It cannot be a header only field. It must have placement on the active requisition document configuration. It must also be a stand-alone field or parent field. It cannot be a child field.

You must have the **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) to perform this task.

Mapping in the UI

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets**.

2. Expand **Default Mapping** in the left menu and click the **Commodity Code** sub-menu item. Configuration options display on the right.

3. Click on the **Manage Category/Commodity List** tab.

4. Locate the commodity code in the list and click on it. The commodity code details display on the right.

5. Click the **Custom Field Mappings** tab (located below the **Selected Commodity Code** section). The custom field displays (the field name is read only).

6. Enter criteria for **Value** or **Description** to search available custom field values. Or simply select **Search** to see a list of all available values (up to 4000).

7. Select the checkbox for the value(s) to map, then click **Add Values**. As values are added, they will show in the left panel for **Custom Field Mappings**.

8. If you have assigned multiple values and would like to make one of them the default value, click the **make default** link. Click the **remove** link to delete an assigned value. Mappings are automatically saved.

Mapping via an Import File

1. Navigate to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets**.

2. Expand **Default Mapping** in the left menu and click the **Commodity Code** sub-menu item. Configuration options display on the right.

3. Select the **Import/Export** tab.

4. Follow the instructions in Manage Commodity Codes to export the current list, or select the **Click to download** link for the **Commodity Code CSV Template** to download a blank template.

5. Complete the fields as described in **Managing Commodity Codes**, paying special attention to:

   - **Custom Field:** The custom field selected to be mapped to all commodity codes. This is the value configured on the Commodity Code > Configuration tab. If you do not want to map a specific commodity code to a custom field value, leave this field blank.

   - **Custom Field Values:** When you have entered the Custom Field value in the previous column, enter all appropriate values to be mapped, separated by a vertical pipe (│). For example, if a commodity code could have one of three custom field

values, you would enter " 1000 │ 2000 │ 3000 ".

- **Default:** If you would like a custom field value populated by default in the cart or invoice based on the item's category and associated commodity code, enter the value here.

6. Continue with submitting, validating and importing the file as described in Manage Commodity Codes .

7. Confirm the changes on the **Manage Category/Commodity List** page.

Mapping Custom Field Values to Commodity Codes (Free Form)

After you have enabled commodity code/category mapping, you can begin setting up the mapping between the JAGGAER categories and your organization's commodity code system. If you selected **Free Form** Values as the mapping type, follow the instructions in this task. This option allows the system administrator to enter a matching category name or number for each category. The value is not validated against a defined list.

You must have the **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) to perform this task.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets**.

2. Expand **Default Mapping** in the left menu and click the **Commodity Code** sub-menu item.

3. Make sure the **Free Form Values** option is selected in the **Mapping Type** field. If this is not selected, this task is not valid.

4. Click the **Category Map** sub-tab. A list of high-level categories displays.

5. You can map at all category levels. Open the sub-categories by clicking on the **+** to the left of the category names. Select one or more categories or sub-categories to map to a single category/code for your organization by enabling the checkbox(es) on the right side of the screen.

6. Enter the name or number of the code from your organization that will map to the selected categories. Enter this name in the Select/Enter New Commodity Code field.

7. Make sure the **Modify Commodity Code** option is selected from the **For the Selected Categories:** drop-down box, then select **Go**. The matching categories display in the **Value Overridden** column.

8. Continue this process for the remainder of the categories and sub-categories.

9. Click **Save** at the bottom of the screen.

10. **To change a current value**, select the category, then choose **Reset Value** from the drop down box. If a new option is entered in the **Select/Enter New Commodity Code:** field, the value will be replaced. If this field is empty, the field will be emptied.

11. To remove all of the values for all categories, select **Reset All** from the drop-down box. **Be cautious with this option.** To reset all the values in the system to a single code, select this option and enter the new code in the **Select/Enter New Commodity Code:** field.

Mapping Configuration and Shopping Cart Results

If you have selected a mapping type of Value List and have chosen to map commodity codes to categories, you can show the commodity code value in the shopping cart. This commodity code value can also control the custom field values associated with the item, if configured.

Based on your configurations, the shopping cart will show the following:

If Categories are Mapped to Commodity Codes:

- If **Automatically populate in cart** is not enabled in the commodity code configuration, no commodity code will display. A user with permission to edit the cart can search for / select from the organization's available commodity codes and associate to the item.

- If **Automatically populate in cart** is enabled, and:

  - **Use category mapped values** is enabled - The commodity code mapped to the category on the Category Map tab will display as the commodity code value for the item, based on the item's category. (Note: You can confirm the item's category by selecting item details.)

  - **Use supplier master commodity code values** - If there is no category mapped value or that option is not configured, enabling this option will display the supplier's commodity code for the organization, as configured in the supplier's profile.

- **If no category/commodity code available, use:** - If there is no category-associated commodity code or a supplier master commodity code (or those options are not enabled), you may enter a value here that will populate as the commodity code for the item. This will prevent the cart from having a blank value for this field.

- If you have configured to allow users to modify the commodity code value, users will have the option to search for / select from a drop-down of all available commodity codes to associate with the item, regardless of category or mapped value.

If Custom Field Values are Associated to Commodity Codes:

- Based on an item's category and the organization's commodity code configurations, a commodity code may or may not be associated with an item. If not, and the user has appropriate permissions, the user can manually select a commodity code to associate with the item.

- Based on the item's commodity code, the designated custom field will be populated with the value as mapped to the specific commodity code. This custom field value for the item may be different than custom field values for the overall cart.

Unit of Measure Configuration and Mapping

Overview

Organizations can map their values for product sizes and Units of Measure to the JAGGAER values. JAGGAER maps supplier values to the JAGGAER values to normalize the data for searching and for mapping to ERP systems. The search interface is modified to include only JAGGAER values to create a more standard search experience for product size and UOM. In order to use the mapping functionality, it must first be enabled in the application. Once enabled, you have the option to map product size and package UOMs for inbound and outbound ERP mapping.

Important Note: In most cases, UOM mapping is enabled and configured during implementation. Sometimes it is necessary for administrators to make adjustments to the mapping. Use caution when making changes to UOM mappings.

Related Permissions

The **Catalog Management** permission (**Permission Settings > Administration > Catalog Administration**) is needed to perform these tasks.

See for information on eProcurement permissions.

General UOM Mapping Configuration

UOM mapping and general mapping parameters are enabled on the UOM **Configuration** tab. When the mapping functionality is enabled, additional tabs display to configure the mapping types.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Category, Commodity and UOM Taxonomy Sets**.

2. Expand **Default Mapping** in the left menu and click the **UOMs** sub-menu item. The UOM **Configuration** sub-tab displays by default.

3. In the Configuration tab, enable the following checkbox to map Units of Measure: **Select to Use UOM Mapping Functionality**.

4. Select an option for **Choose Display Format for Packaging UOM**. **Note:** This setting should be configured even if you are not mapping UOM as it determines how UOMs are displayed to end users. Changing this setting will only change what the user sees online. It will not change the UOM on the order to the supplier or the UOM value that is passed back into your ERP system.

5. Select an option for the **Outbound to ERP Integration Value**. This setting determines the primary Package UOM used in ERP integration points. Please note that the Supplier UOM will always be used on the Supplier Fax/email document and in the Supplier cXML.

6. Select an option for **Default Inbound Package UOM Value**. This setting determines which Package UOM value should be used with imported UOM values if no mapping exists. It is critical that users make a selection. **Each** is a common selection.

7. Click **Save**. Additional sub-tabs for the UOM mapping functionality.

Package UOM Inbound from ERP Mappings

Enter your own organization Packaging UOM values and map them to the default JAGGAER values. These values will be used for the product's packaging UOM when importing documents into the application from your ERP system.

1. Select the **Package Inbound** tab.

2. Click the **New** button. A new row appears in the table.

3. Enter an **Organization Value**

4. Select the corresponding **System Value** from the drop-down options.

5. Click **Save**. To remove a mapping, click the **Delete** button.

Product Size UOM Inbound from ERP Mappings

Enter your own organization Product Size UOM values and map them to the default JAGGAER values. These values will be used for the Product Size UOM when importing documents into application from your ERP system.

1. Select the **Product Size Inbound** tab.

2. Click the **New** button. A new row appears in the table.

3. Enter an **Organization Value**.

4. Select the corresponding **System Value** from the drop-down options.

5. Click **Save**. To remove a mapping, click the **Delete** button.

Package UOM Outbound to ERP Mappings

The **Package Outbound** tab lists all the default System Packaging UOM values. You can enter your organization's corresponding value.

1. Select the **Package Outbound** tab.

2. Edit the default **Organization Value** for the appropriate **System Value**.

3. Click **Save**.

Product Size UOM Outbound to ERP Mappings

The **Product Size Outbound** tab lists all the default System Packaging UOM values. You can enter your organization's corresponding value.

1. Select the **Package Size Outbound** tab.

2. Edit the default **Organization Value** for the appropriate **System Value**.

3. Click **Save**.

Order Configuration & Distribution

Order Processing Options

Overview

Some options that affect how orders work include setting up number wheels for orders, configuring line history settings, enable order acknowledgments and advanced shipping notices for suppliers and hiding workflow for users or user roles.

Related Permissions

In most cases the **System Configuration** permission (**Permission Settings > Administration > System Administration**) is needed to set up to perform these tasks.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Setting Up and Managing a Number Wheel

Number wheels can be used to assign order numbers to POs can credit card purchases. Organizations that use the AP product can also use number wheels to assign numbering to receipts and invoices. The focus of this task is creating and managing number wheels. For information about assigning number wheels for orders, please see . For information about assigning number wheels to receipts an invoices, please see the topic "Receipt and Invoicing Number Wheels" in the **Invoicing Handbook** or online searchable help.

You must have the **System Configuration** permission (**Permission Settings > Administration > System Administration**) to perform this task.

1. Go to **Setup** ⚙ **> General Site Settings > Configure Number Wheel**.

2. Existing number wheels display on the left. To edit a number wheel, click the wheel name. To create a new number wheel, click the **New Wheel** button.

- **Prefix** - This is an optional field that allows you to add an alphanumeric identifier to the beginning of each number assigned. For example **PO05-** might come before each sequential number assigned. Additionally, you can select a custom field value as part of the prefix. The value that the user selects in the purchase requisition is displayed as part of the PO Number. For example, Using Department code 026 as the custom field and / as the separator, a PO number could like this: **026/00001PO**.

- **Pad sequence with leading zeroes?** - Turn on this checkbox to enable padding, which ensures the same number of characters for all POs created. If this option is enabled, all extra "spaces" will be filled with a 0. If this option is enabled, you must also determine the maximum number of 0s to populate in the **Up to () Characters** field.

- **Starting Number** - The starting number for the number wheel, which is typically 1. This number can be up to six digits.

- **Suffix** (Optional) - This is an optional field that allows you to add an alphanumeric identifier to the end of each number assigned. For example, **-PO05** might come after each sequential number assigned. Additionally, you can select a custom field value as part of the suffix. The value that the user selects in the purchase requisition is displayed as part of the PO Number.

- **Increment** - Determines how the numbers will be incremented and is typically by one.

- **Next Number** - This is an information-only field and for new number wheels, this will be the same as the start number. For a number wheel currently being used, the next number to be assigned displays.

3. Click **Save Changes**.

- For PO's, the setting is at **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Default Ordering Settings > Payment Method**.

- For Receipts and Invoices, the setting is at **Accounts Payable** 🏛 **> AP Administration > Configure AP Settings**, in the **AP Configuration** tab.

Configure the Line Item History Settings

This feature applies to organizations that shop in the application. The **Line Item History** feature allows shoppers to search for recent orders of a specific item. Line item searches can be done for each item in a cart. This feature can help shoppers identify how recently an item has been purchased and can help reduce buying redundancy. An administrator can set the parameters

within which the history is searched (time frame, etc.). The search evaluates orders that meet the criteria of those parameters. **Note:** For organizations that do not place orders through the application, the system will show items that were sent back to the ERP.

You must have the **System Configuration** permission (**Permission Settings > Administration > System Administration**) to perform this task.

1. Go to **Setup** ⚙ **> General Site Settings > System Settings and Configuration**.

2. Locate the **Line Item History** section and expand it.

3. To make updates to the settings, click the **Edit** button. Each of the configuration options is described below:

   - **Days** - Enter a value in this field that indicates the number of days that the application should search back through for item history.

   - **Department** - Select the Department option to group item history by department. **Note:** If your organization does not have any departments configured, this option is not available.

   - **FlexField** - Select the FlexField option to group item history by Flex Fields. To include information for a specific FlexField with the line item history, select the field from the drop-down options. **Note:** If your organization does not have any Flex Fields configured, this option is not available.

   - **Custom Field** - Select the Custom Field option to group item history by custom fields. To include information for a specific custom field with the line item history, select the field from the drop-down options. **Note:** If your organization does not have any custom fields configured, this option is not available.

   - **None** - If you do not want the fields grouped by any of the grouping choices, select the None option.

4. Click **Save**.

Enable Warning for Duplicate Items in Cart

A **Duplicate Item Warnings Settings** validation can be enabled to notify users if an item in their carts has recently been ordered, preventing users from potentially ordering duplicate items.

When a user is viewing their order at checkout:

- The system will check if possible duplicate items were ordered for the following product types only: hosted catalog items, contract non-catalog items and punch-out items. For these product types, the product identifier is the item/catalog number. For punch-out items the supplier's name must also match.

- The organization setting determines the criteria that the system uses to search for the requisitions that will be included in the duplicate check, as well as the time period to search. The search criteria is based on the department (if used by the organization) or a custom field.

If there are potential duplicates, a warning is displayed, and users can view details of the potential duplicate item in a pop-up window. This feature is also supported on the mobile app.

- The validation is displayed by line number. Users can click a line number in the warning to view details of the duplicate item in a pop-up window.

- Organizations can choose whether the system will search for duplicate items by department or by a custom field. They can also choose the time period within which the system will look for duplicates.

- The duplicate warnings will trigger for hosted catalog items, contract non-catalog items and punch-out items. For these product types, the product identifier is the item/catalog number. For punch-out items the supplier's name must also match.

- The system will search requisitions that have reached Pending and Completed status within the number of days specified on the configuration. Withdrawn, returned and rejected requisitions will not be considered as potential duplicates.

- This feature is supported on the mobile app with slight modifications (i.e., clickable links are not available on mobile).

Enable Duplicate Warning Validation

The System Configuration permission is needed to perform this task:

1. Navigate to **Setup** ⬡ **> General Site Settings > System Settings and Configuration**.

2. Expand the **Duplicate Item Warnings Settings** section and complete these fields:

   - **Enabled** - This setting is off by default. Select the radio button to activate the feature. If enabled, users will be notified if an item they have added to their carts matches an item that has recently been ordered.

   - **Days** - Enter a number that represents the number of days prior to the current date that the system will check for duplicates. The default value is 7 days. This can be changed to a numeric value between 1 and 365 days.

3. Select the criteria that the system will use to check for duplicates by enabling **ONE** of the following options - it must be either Departments OR Custom Fields. A warning is displayed if the setting is enabled without duplicate criteria selected.

   - **Department** - This setting is off by default. Select this option to have the system search for duplicate items by department.

     > **Note:** This option is not displayed if your organization does not use department or role relationships. Contact JAGGAER if you wish to enable these settings for your organization.

   - **Custom Field** - This setting is off by default. Select this option to have the system search for duplicate items by custom field. If this option is selected, a drop-down menu listing active custom fields for your organization is displayed. Select a single custom field for the duplicate comparison.

4. **Update user permissions**:

   a. Open the user role or user profile:

      - *User roles* - Navigate to **Setup** ⬡ **> Organization Structure and Settings > Manage User Roles** and select the **user role** to update.

      - *User profiles* - Navigate to **Administer** ⬚ **> Manage Users > Search for Users** and select the **user profile** to update.

   b. In the left menu, select **Permissions** (for user roles) or **Permission Settings** (for user profiles), then **Shopping, Carts & Requisitions**.

c. In the right panel, under the **Cart/Requisition** sub-heading, enable the **View Warnings for Potential Duplicate Items** permission. Users with this permission will see a validation warning at checkout if an item they have selected has been ordered by another user within the duplicate criteria defined by the organization.

Enable Order Acknowledgments and Advanced Shipping Notices for Suppliers

Suppliers can be set up to send order acknowledgments and advanced shipping notices (ASN) through the supplier portal. This allows them to review their sales orders and send these types of notifications back to a customer:

- **Order Acknowledgments** are sent by suppliers to confirm that they received the order and indicate if items on the order have been accepted, backordered, or rejected. Suppliers can also indicate the quantity of items being shipped, provide an estimated shipping date, and enter comments about the order. **Important Note:** Enabling this setting grants the supplier the right to reject individual line items as well as entire orders.

- **Advanced Shipping Notices** are sent by suppliers to notify buyers or receivers that a shipment has been scheduled for delivery. These notices include shipping and delivery dates along with carrier and tracking information. Suppliers can also indicate the quantity of items being shipped and enter comments about the order.

To do this, the following settings need to be enabled for individual supplier profiles in the application.

1. Navigate to **Suppliers** 🗔 **> Search for a Supplier** and open the profile of the supplier you want to allow to send Order Acknowledgments or Advanced Shipping Notices.

2. In the supplier profile, expand the **eProcurement** heading in the left menu, then select **Integration Settings**.

3. Under the **Integration Settings** heading in the right panel, click the checkbox in the **Override Defaults** column, then select the checkbox next to these settings:

    - **Allow Supplier Order Confirmations through Portal and Email** - This controls whether or not an organization receives order acknowledgments from the supplier through the supplier portal. Select the checkbox to allow the supplier to send order acknowledgments through the supplier portal. **Important Note:** Enabling this setting grants the supplier the right to reject individual line items as well as entire orders.

> **Note:** There is also an Order Acknowledgment (OA) link that is included in order distribution emails by default. When suppliers click the link, they are directed to a web form where they can create an order acknowledgment without logging into the network or supplier portal. The link can be *disabled* by overriding the default setting. See "Defining Distribution, Order and Supplier Defaults for Catalog Orders" on page 598 for more information.

- **Receive Portal Advanced Ship Notice messages** - This controls whether or not an organization receives advanced shipping notices from the supplier through the supplier portal. Select the checkbox to allow the supplier to send advanced shipping notices through the supplier portal.

4. Click **Save**.

> **Note:** Supplier portal administrators may also need to enable the **Create Order Acknowledgments** and **Create Advanced Shipping Notice** permissions for the supplier in the supplier portal.

Set Up Estimated Delivery Dates

The system can be configured to automatically calculate an **estimated delivery date** for catalog items and contract non-catalog items based on estimated delivery lead times provided by suppliers.

- **On catalog items** - A **Delivery Lead Time** field on supplier hosted catalogs can be updated by suppliers in the supplier portal.

- **On contract non-catalog items** - Customers can include a delivery lead time that has been negotiated with a supplier on contract non-catalog items.

This is an *estimated* delivery date that does not take into consideration weekends, local holidays, and shipping methods, but it can provide useful information for customers when they are sending orders to suppliers, so that buyers know when to expect delivery.

How It Works

> **Note:** The Delivery Date Type and Delivery Lead Time fields mentioned below are only displayed if they have been added to the active requisition and purchase order document configurations.

On catalog items and contract non-catalog items

- **Catalog Items** - Users searching for an item can see the delivery lead time entered by a supplier in the **Delivery Lead Time** field on item details.

- **Contract Non-Catalog Items** - When a user adds a non-catalog item to a contract, they can enter the lead time that has been negotiated with the supplier for that item in the **Delivery Lead Time (Days)** field.

On carts

- **Catalog Items** - Users can see the delivery lead time entered by a supplier in the **Delivery Lead Time** field on item details.

- **Contract Non-Catalog Items** - Users who are adding a contract non-catalog item from a contract in *Executed: In Effect* status to their cart can see the delivery lead time in the **Delivery Lead Time** field on item details.

On draft requisitions

Fields relating to the delivery date are displayed on catalog items and contract non-catalog line items as follows:

- The **Delivery Date Type** field shows how the estimated delivery date will be calculated. It will show one or two options:

  - **Estimated by Delivery Lead Time** - If there is a delivery lead time entered for a catalog item or contract non-catalog item, "Estimated by Delivery Lead Time" is displayed in the Delivery Date Type field by default. When a purchase order is created, the estimated delivery date will be calculated by the system. This option is not displayed if there is no delivery lead time entered for the contract non-catalog item.

  - **User Specified Date** - Users can choose this option from the Delivery Date Type drop down to specify an estimated delivery date in the delivery date field. If there is no delivery lead time entered for a contract non-catalog item, this is the only option available.

  Users can change the selection at any time, even after the date has been calculated.

- The **Delivery Lead Time** field shows the delivery lead time that has been set for the catalog item or contract non-catalog item, i.e., 5 days. When a purchase order is created the system will add the delivery lead time to the PO creation date to calculate an estimated delivery date for an item.

- The **Requested Delivery Date** field on draft requisitions shows "no value" as the date is not calculated yet.

> **Note:** The name for the field where the delivery date is displayed is named "Requested Delivery Date" by default. The field may be renamed and displayed as "Delivery Date" or "Estimated Delivery Date" in your application.

On submitted requisitions

The estimated delivery date is calculated when the purchase order is created and it will populate the delivery date field on the requisition. For example, if a requisition was submitted on May 1, and the delivery lead time for a contract non-catalog item is 5 days, the estimated delivery date would be May 6.

On purchase orders

The estimated delivery date is calculated when the purchase order is created, and recalculated for each PO revision. Using the example above, if the PO was created on the same day that the requisition was submitted, the delivery date would not change, it would be May 6. However, if the PO was created at a later date, such as May 7, the delivery date would be changed to May 12 (PO creation date + 5 days delivery lead time).

On invoices and change requests

The delivery date fields are populated from the purchase order.

To enable this feature, the **Delivery Date Type**, **Delivery Lead Time** and **Requested Delivery Date** field elements must be added to the active requisition and purchase order document configurations:

1. Update the **PR document configuration**:

   a. Navigate to **Setup ⚙ > Configure Documents > Configure Requisition Document**.

   b. Open the **Draft** copy of the active document configuration and click on the **Layout Details** tab.

   c. Configure settings for the **Delivery Date Type**, **Delivery, Lead Time**, and **Requested Delivery Date** system fields. There are two options:

- **Basic Configuration** (line item values cannot be copied) - This configuration does not allow the allow the Delivery Date Type and Requested Delivery Date values on requisitions to be copied from one line to another.

    i. Add the **Delivery Date Type** and **Delivery Lead Time** field as "Line only" elements to the document configuration. Select the placement, display order and validation options for each field.

    ii. We recommend that the **Requested Delivery Date** field is set to "Line Only".

- **Alternate configuration** (line item values can be copied) - This configuration allows the Delivery Date Type and Requested Delivery Date values on requisitions to be copied from one line to another.

    i. Configure these settings for the **Delivery Date Type** and **Requested Delivery Date** system fields. These two fields should be in the same header group:

        - **Delivery Date Type** - In the **Editable by header / line** field in the panel on the right, select **Header and line** in the drop-down field. In the **Placement** section, select the appropriate header group. Save changes. **Note:** If the **Header and line** option is selected, it is used only to facilitate copying and the Delivery Date Type field will not be displayed on the header, it will only appear at the line-level.

        - **Requested Delivery Date** - In the **Editable by header / line** field in the panel on the right, select **Header and line** in the drop-down field. In the **Placement** section, select the appropriate header group. Save changes.

    ii. Configure these settings for the **Delivery Lead Time** field:

        - **Delivery Lead Time** - In the **Editable by header / line** field in the panel on the right, select **Line only** in the drop-down field. In the **Placement** section, select the appropriate column. Save changes.

    d. Save changes, then finalize and activate the PR document configuration.

2. Update the **PO document configuration**:

a. Navigate to **Setup** ⚙ **> Configure Documents > Configure Purchase Order Document**.

b. Open the **Draft** version of the PO document configuration.

c. Open the **Summary Page** tab.

d. Add the **Delivery Date Type** and **Delivery Lead Time** field as "Line only" elements to the document configuration. Select the placement, display order and validation options for each field.

e. Add the **Requested Delivery Date** field to the document configuration. We recommend that the **Requested Delivery Date** field is set to "Line Only".

f. Save, finalize, and activate the PO document configuration.

> **Important Note:** If this feature is enabled, we highly recommend changing the name of the **Requested Delivery Date** field in field management to indicate that the field contains a system-calculated delivery date, such as "Delivery Date" or "Estimated Delivery Date".

> **Note:** The **Delivery Lead Time** system attribute on supplier hosted catalogs can be updated by suppliers in the supplier portal, either manually or through XML or CSV imports. On customer orders, when a PO is created the system will add the delivery lead time to the PO creation date to calculate an estimated delivery date for an item.

Hide Workflow in New Experience Views

The **Restrict Document Workflow View** setting allows organizations to hide or display the workflow to users on requisitions, purchase orders and invoices in the new experience views. If the setting is enabled, workflow on carts, requisitions, purchase orders and invoices will be displayed or hidden as configured for a user by your organization.

Related Permissions

Permission	Description	Location
Show Requisition Workflow in Sidebar	If the Restrict Workflow View setting is enabled for an organization, this permission allows a user to view workflow on requisitions	Permission Settings > Approvals > Requisition Approvals
Show PO Workflow in Sidebar	If the Restrict Workflow View setting is enabled for an organization, this permission allows a user to view workflow on purchase orders.	Permission Settings > Approvals > Requisition Approvals

Permission	Description	Location
Show Invoice Workflow in Sidebar	If the Restrict Workflow View setting is enabled for an organization, this permission allows a user to view workflow on invoices.	Permission Settings > Approvals > Invoice Approvals

In the new experience views only, the following configuration can be enabled to show or hide workflow for users or user roles. If this setting is enabled, the workflow visibility on documents is OFF for all users by default (the **What's next?** section in the right sidebar does not appear) and must be enabled by giving a user or user role the new workflow visibility permissions before they will be able to see workflow on documents.

1. Enable the setting to hide workflow:

   a. Navigate to **Setup** ⚙ **> Configure Documents > General Document Configuration Settings**.

   b. Select the **Restrict Document Workflow View** checkbox under **General Configuration** and save. Once this setting is enabled, workflow on requisitions, purchase orders and invoices is NOT visible to users by default and the Show Requisition Workflow in Sidebar, Show PO Workflow in Sidebar and Show Invoice Workflow in Sidebar permissions become available under Permission Settings > Approvals. Users will need the new permissions to view workflow on these documents.

2. Apply workflow visibility permissions to user profiles or user roles:

   a. Open the user profile or user role:

      - *User Profiles* - Open a user profile. Select **Permission Settings > Approvals** in the left menu.

      - *User Roles* - Navigate to **Setup > Organization Structure and Settings > Manage User Roles**. Select the user role to change, then select **Permissions > Approvals** in the left menu.

   b. Enable the following permissions for the document type as needed. In the new experience views only, users with these permissions will see workflow under the **What's next?** section in the right sidebar on requisitions, purchase orders and invoices:

      - Under **Requisition Approvals**, select **Show Requisition Workflow in Sidebar**.

- Under **Invoice Approvals**, select **Show Invoice Workflow in Sidebar**.

- Under **Purchase Order Approvals**, select **Show PO Workflow in Sidebar**.

- Under **Receipt Approvals**, select **Show Receipt Workflow in Sidebar**.

Default Ordering Settings

Overview

There are several options related to order management including how orders are distributed to suppliers, how orders are payed for (via POs, credit cards, etc.), and more. This information is only applicable to those organizations that send out orders through the application or use the PO Export integration feature.

Note: For details about managing order distribution, refer to Order Distribution Management.

Related Permissions

The **System Configuration** permission (Permission Settings > Administration > System Administration) is needed to perform these tasks.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Setting Up Payment Methods

The system allows you to select one or more payment methods that can be used for purchase orders. There are a number of payment methods, most of which can be set up at the organization level, including free form PO numbers, a PO Number wheel, and credit cards (PCards). Payment methods can be overridden at the supplier or location level. The organization setup typically occurs during implementation and only minor adjustments are made after go-live. The system can be set up so that all orders are paid via Purchase Order, all orders are paid via Credit Card, or both types of payment are allowed. Other details about payment methods:

- Blanket Orders, Ghost Cards and virtual payment cards (if enabled for your organization) are additional payment methods that can be enabled at the supplier level.

- Permissions control the ability of users to set up credit cards in their profile, and to use a credit card for payment upon checkout. These permissions can be turned on/off at the Role level, as well as for individual users.

- Purchase Order and Credit Card purchases can use separate numbering schemes to identify orders. Order numbers can be system-generated, generated by number wheels, or free-text entered by the end user.

- If both Purchase Orders and Credit Card purchases are set up for number wheel, the customer may choose to generate numbers for both types of purchases from the same number wheel, or can opt for using separate, unique number wheels.

Your organization can choose to set up PO numbering, PCards, or both for order delivery. An administrative permission is available (Edit PO Number) that allows a user to overwrite the assigned purchase order number. If a PO number is overwritten, the changes are tracked in History. Use caution when assigning this permission.

Note: Payment information can be overridden at the supplier-level through the Supplier Profile. Refer to the "Overriding Distribution at the Supplier Level " in the online searchable help.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Default Order Settings (eg. Tax, S&H, Payments)**. The **Payment Method** screen is displayed by default.

2. Configure payment methods by completing fields the following sections. Click the **Override Default Values** checkbox for a field in order to make changes to that field.

   PCard

   - **Use PCard** - If this field is checked, the PCard functionality is enabled.

   - **PO Numbering Scheme** - This field determines how PCard POs will be numbered. Select a number wheel from the options or select *System Generated* to assign numbers based on PO ID. For information about managing number wheels, please see .

   - **Require Card Security Code on credit card orders from ad-hoc suppliers** - Enable this setting to require the card security code (CV2 code) for suppliers that are not set-up in supplier profile. **Note:** For additional information about use of this field, please see field help in the application.

   - **Require Security Code** - Enable this setting to require the three-digit security code in order to use the PCard.

- **CV2 Time Before Removal (PO Only)** - This setting determines how long the card security code (CV2) will be available on the PO before the system removes the card security code. The time begins when the PO completes workflow. Once the set number of days has passed, the card security code will automatically be removed. **Note:** You must contact JAGGAER in order to have this setting changed.

- **Hide credit card number from suppliers on closed sales orders** - Enable this setting to mask the credit card number and security code on closed sales orders (regardless of a supplier user's permission setting to view credit card details).

Corporate Payment Services vPayment

- **Use Corporate Payment Services vPayment** - Select to enable the Corporate Payment Services vPayment for the organization, default supplier setting, or supplier fulfillment center. Note: This option is only available if the Corporate Payment Services vPayment Adapter is licensed.

- **PO Numbering Scheme** - The PO Numbering Scheme should be selected for vPayment purchases. The dropdown will include System Generated, as well as any custom PO Wheels created for the site. This reference/PO number appears at the top of all vPayment purchases. Selecting System Generated will automatically assign reference/PO numbers based on the POID.

- **Default Expiration Days** - Default Expiration Days is used to calculate the expiration date of the credit card assigned by American Express vPayment. The value entered is added to the PO date to set the appropriate expiration date. For example, entering 90 days would set the expiration date to 90 days from the date the PO is sent to the supplier. This value is required if vPayment is selected as a payment method.

- **Cardholder Name** - The Cardholder Name field is for the value determined for the organization by American Express vPayment.

JPMorgan Chase VCard

- **Use JPMorgan Chase VCard** - This option is only available if the JPMorgan Chase VCard feature is enabled for your organization. Select to enable the use of the JPMorgan Chase VCard for *all* suppliers in the organization. This provides the ability to assign a one-time credit card number to an associated order amount.

> **Important Note:** The JPMorgan Chase VCard setting **cannot** be active if Corporate Payment Services vPayment is also active.

Purchase Order

- **Use PO** - If this field is checked, the Purchase Order functionality is enabled. Click the **Use PO** checkbox and make sure a green check displays. If this option is not available, click the Override Default Values checkbox first. Most organizations choose to enable this payment option.

- **PO Numbering Scheme** - This field determines how PCard POs will be numbered. Select a number wheel from the options or select *System Generated* to assign numbers based on PO ID. For information about managing number wheels, please see .

- **Allow Free-form PO Numbers** - Selecting this options allows users with the Edit PO Number permission to enter a PO number during the checkout process to override the default PO numbering scheme.

3. Click **Save**.

Setting Up Taxes, Shipping, and Handling

Taxes, shipping and handling costs generally need to be factored into the cost of goods and services. Although the actual values for these entities are calculated and charged by the vendor, the application allows organizations to estimate the charges for budgetary and workflow purposes. Default estimated tax rates, shipping and handling can be set up at the organization level and overridden at the supplier level. **Note:** Estimated tax, shipping and handling are for internal budgeting and workflow only and are not passed to the supplier on a purchase order.

The tasks below address setting up taxes, shipping and handling at the organization level. For information about overriding these estimates at the supplier level, please see "Overriding Distribution at the Supplier Level ".

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Default Ordering Settings**.

Setting up Estimated Taxes

1. Click the **Tax** tab.
2. Configure the options in the general section:

   - **Mark items taxable by default** - Turn on this checkbox to set the taxable flag for all items added to a shopping cart. A shopper will have the option to deselect the taxable flag if appropriate.
   - **Split PO on mixed taxable line status** - This option determines if the Purchase Order will be split based on the line item's taxable status. You can override the organization setting for individual suppliers via the supplier profile.

- **Enable Tax Estimation** - Turn on this option to indicate that tax estimations will be used for items and orders. If this checkbox is turned on, additional options display below this field. **Note:** If this field is **NOT** enabled, the remaining tax configuration fields do not display.
- **Accept tax calculations from SCT Banner** - If your organization utilizes this type of integration, enable this option if you want to accept tax calculations from that system.
- **PR Import populate default Tax values** - If your organization uses Purchase Requisition Import integration, enable this setting to include default tax values when requisitions are imported. This will automatically apply tax estimates to the imported requisitions. If this setting is not enabled, imported requisitions will have zero dollar value for taxes.
- **Enable Rule Based Tax Estimation** - Select the checkbox to allow an organization to set up tax calculation rules to perform rule-based tax estimations. The setting is Off by default. This setting is visible only if the "Enable Tax Estimation" setting is enabled. If selected, tax rules can be configured for a user-defined tax code based on items such as the supplier, supplier fulfillment addresses, Remit To Address country, Bill To and Ship To addresses, commodity codes, UNSPSC, business units and Tax Exempt. Once tax calculation rules are configured, when the system finds a tax rule match on a PO, PR, or invoice, it will apply the tax rate from the user defined tax code to the document. See "Configure Tax Calculation Rules for User-Defined Tax Codes" in the **Invoicing Handbook** or online searchable help for more information.
- **Prevent Tax Engine from updating taxes without review** - - Select the checkbox to display a warning on invoices when there is a difference between the **current invoice** total and the total tax calculated by the tax engine. When the warning is displayed, the tax engine will not override taxes without review. and users will have the option to keep the current total, modify tax values, or allow the tax engine to calculate the tax total.
    - *When the setting is ON* - The tax engine will store data but will not override existing tax values. The Tax Code, Tax Description, Tax Rate or Tax Amount values are not changed by the tax engine.
    - *If the setting is OFF* - The tax engine will automatically update tax values.
- **Allowed Tolerance for discrepancy between Invoice Current Tax and Tax Engine Amounts** - This field is displayed if the checkbox above is selected. In this field, **enter a number** (up to 3 characters) that represents the tolerance amount for a discrepancy between the tax engine calculation and the current tax amount on an invoice, so that if an invoice exceeds the tolerance amount, a warning will be

displayed and the tax engine will not override taxes without review. The setting is blank (or zero) by default, which means that any discrepancy will trigger a warning.

- E.g., If the Allowed Tolerance is set at 0.10 USD (10 cents), then users will be warned only when the discrepancy between the tax engine calculated tax value and the current tax value is more than 10 cents. If the discrepancy is less than 10 cents, the tax engine will automatically apply its calculated value without warning the user.
- Discrepancy is considered outside tolerance if the header tax discrepancy exceeds tolerance OR if the sum of discrepancies on each line exceeds tolerance.

3. Configure the **Tax Rates** section:

- **Select to Use Tax1** - This tax is typically a local sales tax. If you enable this option, you will then set the appropriate **Tax1 Rate** in the next field.
- **Default User Defined Tax Code for Tax 1** - If the **Enable Rule Based Tax Estimation** checkbox is selected above, choose the user-defined tax code that will be used by default if there is no tax rule match on a cart, PR, PO or invoice. Only tax codes with eternal values (i.e., "Always Active") can be selected to be the default.
- **Select to Use Tax2** - This tax is typically a provincial or federal tax that may exist on top of the local tax. If you enable this option, you will then set the appropriate **Tax2 Rate** in the next field.

4. Configure the **Taxable Items** section of the screen, which determines if estimated taxes will be applied to shipping and handling charges.

- Apply Tax to Shipping - Select this checkbox to apply the tax rates to shipping.
- Apply Tax to Handling - Select this checkbox to apply the tax rates to handling.

5. Click **Save**.

Setting up Estimated Shipping and Handling.

1. Select the **Shipping/Handling** tab.
2. Configure the general section:

- **Enable Shipping and Handling Estimations** - Turn on this checkbox to indicate that shipping and handling estimations will be used. If this checkbox is turned on, additional options display below this field. **Note:** If this field is **NOT** enabled, the remaining shipping / handling configuration fields do not display.

- **Transmit Estimations in Banner Integration** - If your organization uses this type of integration, enable this option if you want the system to transmit shipping and handling estimations.
- **PR Import uses system default Shipping and Handling values** - If your organization uses Purchase Requisition Import integration, enable this setting to include default shipping and handling values when requisitions are imported. This will automatically apply shipping and handling estimates to the imported requisitions. If this setting is not enabled, imported requisitions will have zero dollar value for shipping and handling.

3. Configure the **Shipping Estimation** and **Handling Estimation** sections. Shipping and Handling estimates have the same configuration options. The field descriptions below apply to both sections.

   - **Fee Type** - Select *Flat Fee* to indicate a flat rate for all shipping or handling estimates or *% Fee* to indicate a percentage.
   - **Fee Percentage** - If *% Fee* is selected in the Fee Type field, enter the percentage here.
   - **Fee Amount** - If *Flat Fee* is selected in the Fee Type field, enter the percentage here.
   - **Calculate At Level** – Select By Order if shipping estimations are to be calculated for each order. The estimation is calculated based on the sum total of extended prices for all line items for a particular supplier in the shopping cart. Select *By Line* if shipping estimations are to be calculated by line item.
   - **Use Threshold** - Enable this setting to apply shipping estimations only to orders over a specific amount.
   - **Threshold Amount** - If you enabled the **Use Threshold** field, enter the threshold amount in this field.

4. Click **Save**.

Setting Up and Assigning PO Clauses

PO Clauses represent special conditions the supplier should reference regarding the order. Orders can contain one or more PO Clauses. Clauses can be set up at the organization-wide level, at the supplier level, or contract level. They can be assigned to all orders by default, and be overridden on a supplier or order level. You can also Configure PO Clause Rules so that the system will automatically attach PO clauses to documents based on criteria set by the organization.

When setting up and assigning PO clauses, you can enter clause text manually or you can upload PO clauses from a file via import. Uploading via import makes it easier to create long and detailed

PO clauses without having to manually enter text. PO clauses uploaded from a file work in the same way as regular PO clauses – they can be previewed, assigned as defaults and displayed as usual on POs, PO faxes, emails and contracts.

The tasks below address setting up PO Terms at the organization level. For information about overriding clauses at the supplier level, please see "Overriding Distribution at the Supplier Level " in the online searchable help. For information about setting up contract-level clauses, please refer to the topics in the **Contracts+ Handbook** or online searchable help.

You must have the **System Configuration** permission (**Permission Settings > Administration > System Administration**) to perform this task.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Default Ordering Settings (eg. Tax S&H, Payments**.

2. Click the **PO Terms** tab and choose one of the following options to create or assign a PO Clause:

    1. Click the **PO Clause Setup** sub-tab.
    2. Existing clauses are displayed on the left side of the page. Clauses that are not active are displayed in *italics*. To open an existing clause, click on the clause number. To create a new clause, click the **New Clause** button. Define the fields.

        - **Clause No.** - Enter a number for the clause. Once the clause is saved, the number cannot be changed. Therefore, if you are updating an existing clause, this field is not editable.
        - **Clause Name** - Enter a meaningful name for the clause.
        - **Clause Format** - Choose one of the following options to enter PO Clause Text. This is the text that is displayed on the purchase order when the clause is selected:
            - **Text** - Use the **Text** option to enter text manually in the application, then type the PO Clause text in the open field.
            - **File** - Use the **File** option to upload a file that contains PO Clause text. If this option is selected, users click the **Upload** button and follow the prompts to upload a file that contains the PO Clause text.
                - After the file is uploaded, clause text can be previewed in the Clause Text field or by clicking the file name and downloading the file.
                - Subsequent file uploads will replace the previously uploaded file.

- Uploaded clauses can be made Active or Inactive.
- Uploaded PO clauses can be selected in the same way as regular PO clauses at checkout, and on PRs, POs, invoices, and contracts. On the documents, users can click **more info** or **Show More** links to view the entire PO clause.

> **Note:** Once a PO Clause is uploaded as a file, the **Clause Format** setting can be changed from **File** to **Text**, which will convert any uploaded file text into manual PO clause text. You can then make manual changes to the text in the Clause Format field and save the changes.

- **Active** - Click the checkbox to make the clause available for use.

3. Click **Save**.

Creating and updating clauses via import

Task 1: Download the Template or Export the Existing Clauses

1. Click the **PO Clause Import/Export** tab.
2. Retrieve the template or export:

   - To begin with a blank template locate the **PO Clauses CSV Template** field and select the **Click to download...** link. When prompted save the file.
   - To export the current clauses, locate the **Action** drop-down field and select *Export*. You must enter a value in the **Description** field when exporting the clauses. When the export is complete, the file will be available in Recent Activity on the right. You may need to click the **Refresh this page** link in order to view the file. When it is available, click the **Click to download...** link. When prompted save the file.

Task 2: Update the Clause Data in the Template

1. Open the file using Microsoft Excel.
2. Enter the information for the clauses in the fields. Please refer to **Creating and Updating Clauses Manually** for information about the available fields.

Task 3: Validating data before importing

1. Click on the **PO Import/Export** tab.
2. In the **Action** drop-down field select *Validate*.
3. Enter a value in the **Description** field.
4. Click the **Browse** button to locate the field on your local system. The file must be in a .csv format.
5. Click **Submit**. If there are any issues, they will be listed on the right side of the screen. These issues should be corrected before importing the data.

Task 4: Importing Data

1. In the **Action** drop-down field select *Import*.
2. A validation window displays. Click **OK**. The data will be updated and the import can be viewed via the application.

Assigning PO Clauses

PO clauses can be included by default for all purchase orders within the organization or within a specific business unit (if your organization uses the multi-business unit feature).

1. Click the **PO Clause Assignments** tab.

   - **If your organization has business units**, a list displays on the left. Select **Organization Defaults** to assign clauses at the organization level or select a business unit to assign clauses to that BU. The active clauses display on the right.
   - **If your organization does not have business units** the active clauses display on the page.

2. You can view the entire clause text by clicking the **more info...** link for the appropriate clause.
3. Assign clauses to the organization or business unit using one of following methods.

   - To assign clauses individually, click the checkbox in the **Assigned** column.
   - To assign all available clauses, click the **Select All** link located above the Assigned column. You can remove all clause assignments by clicking **Deselect All** link.

4. Click **Save**.

Define Default PO Terms and Conditions and Contact Information

Organizations have the option to set default terms and conditions, contact information, acceptance instructions, etc. that can be included on purchase orders. These entities can be set up at the organization or business unit level and overridden at the supplier level in the supplier profile.

The tasks below address setting up terms and conditions at the organization level. For information about overriding these entities at the supplier level, please see "Overriding Distribution at the Supplier Level " in the online searchable help.

You must have the System Configuration permission (Permission Settings > Administration > System Administration) to perform this task.

1. Go to **Setup > Hosted Catalog and Ordering Configuration > Default Ordering Settings**.

2. Click on the **PO Terms** tab, and then the **Terms and Conditions** sub-tab.

   - *If your organization has business units* - A list displays on the left. Select **Organization Defaults** to configure the Terms and Conditions entities at the organization level or select a business unit to configure. The fields display on the right.

   - *If your organization does not have business units* - The fields simply display on the page.

3. Configure the **Terms and Conditions** fields as necessary:

   - **Order Acceptance Instructions** - This is text is appended to the bottom of purchase orders distributed via email and fax. These instructions typically provide information on order status, back order information, and similar topics. There is a 700 character limit.

   - **Supplier Terms and Conditions** - You can attach a Terms and Conditions document to the back of email and fax orders. This is typically a one page document. Click the **Use Terms and Conditions** (T&Cs) checkbox and then click the Browse button to locate the file on your local system. **Note:** Although JAGGAER does not limit the file length, we strongly recommend the file be one page only for suppliers.

   - **Payment Terms** - Payment terms indicate discounts for early payment and when the full invoice amount is due. Custom payment terms can also be displayed on documents. Complete these fields:

- **Use Payment Terms** - Click the checkbox if payment terms are to be included on POs and used for calculations of invoices.

- **Payment Terms** - Configure payment terms as follows.

    - *If your organization has enabled standard payment terms* - The **Standard Payment Terms** field is only displayed if your organization has set up standard payment terms. Select a standard payment terms from the drop down list. The Discount, Days, Type and Days After fields are read-only fields that show information for the selected payment term.

    - *If your organization has not set up standard payment terms* - The first two fields on payment terms are used to define any discount that would be applied for early payment, and the last two fields are used to calculate the due date for the full invoice amount. Complete the fields as follows:

        - **Discount** - This is the value of the discount that will be applied to the invoice total if payment is made before the number of days indicated in the Days field. This can be a percentage or a specific amount.

        - **Days** - This is the number of days after receipt of an invoice that the discount can be applied. After this number of days, the full invoice amount is due on the invoice due date that has been calculated from values in the Type and Days After field.

        - **Type** - Determines how the invoice due date will be calculated. Net is the only option that can be selected if no other payment term types are enabled. Additional payment types EOM, MFI, Manual and EOQ are available for selection if they have been activated for use by your organization.

        - **Days After** - Is used to add extra days to the invoice payment Type to extend the due date of an invoice. The field is required, optional or not available depending on the payment Type selected.

- **Use custom payment terms** - Select the checkbox to display custom payment terms on purchase orders and invoices. **Note:** Custom payment terms are displayed as information only and are not used in any calculations. See for additional information.

- **Custom Payment Term** - Select the custom payment term that will be displayed on PRs, POs and invoices. **Note:** The options that are available for selection in this field are imported via the Custom Payment Terms Import/Export. A message will indicate if no custom payment terms have been imported. See for more information.

    - **F.O.B. (Freight on Board**) - Select **N/A**, **Origin**, **Destination**, or from other values your organization may have defined.

  - **Order Contact Information** - Some organizations prefer for vendors to contact the purchasing department or another single source for questions related to orders, instead of contacting the requisitioner directly. To enable this, click the Use purchasing information checkbox and enter the information in the fields. Note: If this option is not enabled, the PO owner's contact information is used.

4. Click **Save**.

Configure PO Clause Rules

PO Clause Rules allow customers to configure rules so that the system will automatically attach PO clauses to documents based on criteria set by the organization.

Configure PO Clause Rules

1. Navigate to **Setup** ⚙ **> Hosted Catalog and Ordering > Default Ordering > PO Terms**.

2. Click the new **PO Clause Rules** tab. Similar to other rule configurations, PO clause rules are set up in four panels.

3. Click the **Add Rule** button to create a new rule. To update an existing rule, generate a search in the Filter panel, then click the **edit** link next to a rule.

4. In the **Rule Info** panel, click **Edit**. Complete these fields and click **Save**:

   - **Internal Name** - Enter an internal system name for the rule.

   - **Display Name** - Enter the name that will be displayed for the rule. This can be the same as the internal name.

   - **Rule Description** - Enter a brief description of what the rule does.

   - Click the **Active** checkbox to enable the setting. This can be done after document-level and line-level rules are added.

5. In the **PO Clauses** panel, select the PO clauses you want to associate with the rule:

   a. Select a **Location** to define which PO Clause field on a document that the rule will apply to. Organizations have the option to display PO Clause fields at header-level, line-level, or supplier-level, and a PO clause rule can be applied to the PO Clause fields at any of those levels.

   > **Note:** There must be PO Clause fields on the requisition and purchase order document configuration at the level that is selected in this field. For example, if "Header Level" is selected here, there must be a header-level PO Clause field on the active document configuration. See "Update document configuration" below for more information.

   b. Click the **Select PO Clauses** button. An overlay opens and displays the PO clauses that can be selected for the rule.

   c. Click the checkbox next to **each PO clause** that the rule will apply to and save changes. The selected clauses are displayed in the PO Clauses panel.

   d. Once PO clauses have been selected for a rule, additional **Edit PO Clauses**, **View PO Clause Details** and **Remove Selected PO Clauses** buttons are displayed in the panel. To edit, view or remove clauses, first select clauses in the panel, then click the appropriate action button.

6. Add PO Clause rules at the **Document-Level** and/or **Line-Level**. These are the rules that direct the system to add a PO Clause to a requisition or purchase order based on the configured rule evaluation. For example, an organization can create a set of rules that will add a PO clause to a purchase order based on the supplier. Select an option from the **Add a new rule for** field, click **Go**, and complete the fields for the rule as directed.

7. The rules are applied to new documents going forward.

Update document configuration (optional)

For PO clause rules, PO clauses must be on the active requisition and purchase order document configuration at the level that matches the rule. For example, if "Header Level" is selected for a PO Clause rule, there must be a corresponding header-level PO Clause field on the active document configuration.

PO Clause fields can be added to an organization's requisition and purchase order document configurations as follows:

1. Navigate to:

   - *Requisition* - **Setup** ⚙ **> Configure Documents > Configure Requisition Document**.

   - *Purchase Order* - **Setup** ⚙ **> Configure Documents > Configure Purchase Order Document**.

2. Open the **Draft** copy of the active document configuration and click the **Layout Details** tab (for requisitions) or **Summary Page** tab (for purchase orders).

3. Expand the **+ All fields** or **+ Unassigned** fields section and select the appropriate **PO Clause** field. Note that there are *three* levels of PO Clause fields for requisitions and *two* levels of PO Clause fields for purchase orders:

   - **Header-only** (requisitions and purchase orders)- PO Clauses are displayed on the document header if they are inherited from organization settings for default clauses. They can automatically be added from an active PO Clause rule and they can also be added manually to a document.

   - **Line-only** (requisitions and purchase orders) - On requisitions, clauses on line items can be inherited from a contract's configuration. On purchase orders, they are inherited from the PR line. They can automatically be added from an active PO Clause rule and they can also be added manually to a document.

   - **Supplier-level only** (requisitions only)- Clauses in this location are inherited from the supplier's fulfillment center configuration. Clauses can be applied from the default settings for the supplier, or specific clauses can be configured on individual fulfillment centers. They can automatically be added from an active PO Clause rule and they can also be added manually to a document.

   > **Note:** On the purchase order fax document configuration, header, line and supplier clauses can be configured on the fax distribution.

4. Add the field element to the document configuration. Select the placement, display order, and validation options for the field.

5. Repeat the steps above to add additional PO Clause fields as needed.

6. Save, finalize, and activate the document configuration.

Setting Up Organization-Wide Decimal Settings

To enable purchasing and invoicing activities involving partial quantities, up to four decimals can be used in quantity fields throughout the application. For example, an invoice can be accepted from a consultant for 12.25 hours of work. When this feature is enabled, users have the ability to create orders and process documents containing decimal quantities. To control the use of decimals in the application, administrators can set the allowed decimal quantity at the organization level.

Important Note: The application allows up to four decimal places (1.9999). However, your organization's other systems may not accept that quantity. **Be sure not to exceed the limits of your ERP or financial system when changing this setting**. Please contact JAGGAER customer support if you have questions or need assistance with this feature.

The tasks and information in this section focus on organization-level setup. However, the quantity can be overwritten at the supplier level. For information, please see "Overriding Distribution at the Supplier Level " in the online searchable help.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Default Ordering Settings**.

2. Select the **Quantity** tab. The **Limit on the Number of Decimals Allowed**. field displays he maximum number of decimals allowed.

3. To change the number, click the **Override Default Values** checkbox for the Number of **Decimals Allowed in Quantity** field and enter a new number in the text box.

4. Click **Save.**

Review Ordering Configuration History

An audit trail that tracks changes made in the ordering sub-tab is available (**Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Default Ordering Settings**). This is an information-only screen that provides detailed information about potentially important changes such as changes to default delivery methods, order acceptance instructions, and more. The History screens are used to track changes, additions, and deletions.

To view all changes, additions, and deletions related to Order Configuration.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Default Ordering Settings (eg. Tax, S&H, Payments**. The **Payment Method** screen is displayed by default.

2. Click on the **History** tab.

3. Review the Order Configuration History:

- **Date / Time** - The date and time a change was saved.

- **User** - The user who made the change.

- **Action** - The type of action the user took. Typically either creating or modifying a value.

- **Section**- The section of the application that the changes took place.

- **Field** - The specific field the user modified. The reference number options (i.e. Wheel) can appear under both Payment Method types (PO/PCard). Therefore, the Field column may also include a bold value to indicate which reference number field was modified. (Ex: PO: Wheel).

- **Old Value** - The value prior to the change.

- **New Value** - The value saved by the change.

4. To filter the data displayed in the table:

   - Click the **+** sign at the top of the screen.

   - Enter the appropriate filter criteria to determine what historical data displays, then click Apply. The historical data will update.

5. Select the **Export CSV** button to export the history results to a csv file. Open the file in Excel for easier viewing.

Order for Another - Option for Data Population

An option is available that provides a quicker and more convenient process for users who frequently purchase on behalf of another user and includes the ability to populate the requisition with values from the Prepared For user's profile. Department buyers and other users will be able to quickly submit requisitions for other users with the correct accounting codes and address information. The following setting for **Update Custom Field and Address Values based on Prepared For user** must be configured by an administrator by navigating to **Setup** ⚙️ **> Configure Documents > General Document Configuration Settings**. With this option enabled the following occurs:

- The custom field values default to the default values of the selected Prepared For user.

- The Ship To and Bill To addresses default to the addresses of the selected Prepared For user including contact lines.

- The custom field value personal list of the Prepared For user is merged with the list of the submitter (prepared by user). Submitters are able to choose from their own lists or the **Prepared For** user's list.

- The next approver updates to the next approver of the Prepared For user.

- Submitters continue to see only the fields to which they have access.

Custom Field Options

Overview

Here are some custom field configuration options available that affect the way custom fields work:

- **Mark custom fields as editable** - Organizations can mark custom fields as editable during the PR approval workflow on their requisition document configuration. A permission can then be assigned to users that allows them to change the custom fields that have been marked as editable while a requisition is in the approval workflow.

- **Real time custom field validation** - Real-time PR custom field validation can be used replicate the accounting code structure, conditionality, and code validations applied by a customer's ERP. It can be set up to trigger alerts in the application as soon as errors occur.

Related Permissions

- The **System Configuration** permission (**Permission Settings > Administration > System Administration**) is needed to perform these tasks.

- To mark custom fields as editable, users with the **Edit Pending Requisitions (My PR Approvals)** or **Edit Pending Requisitions (Any Approval folder)** permission can edit all fields on a requisition while it is in the requisition approval workflow. These permissions take precedence if a user has one of these permissions plus the **Edit specific custom fields in Pending Requisitions (My PR Approvals)** permission, i.e., the user will be able to edit all fields on a requisition when they are approving it.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Define Editable Custom Fields in PR Approval Workflow

Regular requisition approval permissions allow approvers to edit all the fields on a requisition while it is in the approval workflow. However, some organizations want to specify which fields can be edited on a requisition while it is in the approval workflow.

To meet this requirement, organizations can mark custom fields as editable during the PR approval workflow on their requisition document configuration. A permission can then be assigned to users that allows them to change the custom fields that have been marked as editable while a requisition is in the approval workflow.

If a user does not have the regular permission to edit pending requisitions, but does have the new permission, they can edit only the custom fields that have been marked as editable when they are approving a requisition, while the rest of the fields are read-only.

It works as follows:

- Users with the **Edit Pending Requisitions (My PR Approvals)** or **Edit Pending Requisitions (Any Approval folder)** permission can edit all fields on a requisition while it is in the requisition approval workflow. These permissions take precedence if a user has one of these permissions plus the **Edit specific custom fields in Pending Requisitions (My PR Approvals)** permission, i.e., the user will be able to edit all fields on a requisition when they are approving it.

- Users who do not have permission to edit pending requisitions, but do have the **Edit specific custom fields in Pending Requisitions (My PR Approvals)** permission can edit only those custom fields that have been marked as editable when they are approving a requisition.

To enable this feature, the **custom fields** that are allowed to be edited by users with the **Edit specific custom fields in the Pending Requisitions (My PR Approvals)** permission must be enabled in the active requisition document configuration, and **user permissions** must be updated to allow users to edit those custom fields:

1. Mark custom fields as editable in the requisition document configuration:

   a. Navigate to **Setup** ⚙ **> Configure Documents > Configure Requisition Document**.

   b. Open the **Draft** copy of the active requisition document configuration and click on the **Layout Details** tab.

   c. Open each **custom field** that will be editable be selected users and click the checkbox next to **Allow assigned approvers with limited edit rights to edit this**

field, then save the changes.

    d. Finalize and activate the requisition document configuration.

2. Update user permissions:

    a. Open the user role or user profile to change.

    b. Go to **Permission Settings > Approvals > Requisitions**.

    c. Enable the **Edit specific custom fields in Pending Requisitions (My PR Approvals)** permission and save changes.

Real-Time Custom Field Validation with ERP

Real-time PR custom field validation can be used replicate the accounting code structure, conditionality, and code validations applied by a customer's ERP. It can be set up to trigger alerts in the application as soon as errors occur. Real-time validation enables users to identify errors earlier in their workflow processes and reduce export errors. Customers can choose the custom fields that they want to configure to trigger real-time validation with their ERP.

How It Works

If your organization has activated this feature and there is a custom field that is configured to trigger an ERP validation, the shopping cart submission button will be changed to **Validate with ERP And Place Order**.
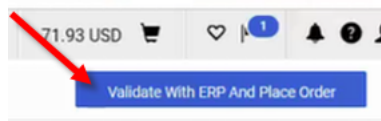
When users click this button, the system begins a connection to their ERP. A <u>full</u> PR validation is run, not just validation on the custom field(s) that were flagged for validation. System messages are displayed to inform users of the status of the validation process.
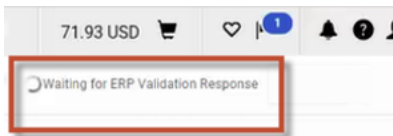
If validation passes, the order is submitted into workflow. If validation fails, the PR must be updated and resubmitted for validation.
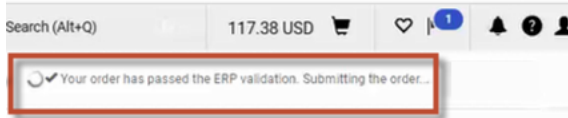
Pass:

Fail:
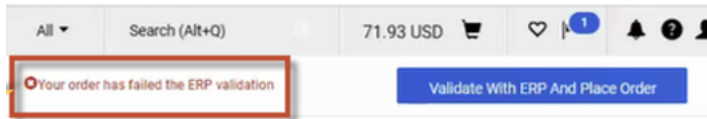
After a PR enters workflow, if changes are made to any of the custom fields that have been configured to trigger real-time validation, the user will be prompted to resubmit the PR for a validation check. If validation passes, the order will continue moving through workflow. If validation fails, the PR must be updated and resubmitted for validation.

> **Note:** If an approver has the **Bypass Review** permission, they will see a **Skip ERP Validation and Continue** button in the validation popup. When this button is clicked, the document will be approved regardless of whether it meets the validation requirements.

Information about validation checks is documented in the PR **History** area.

Before You Begin

- Please contact JAGGAER for assistance if your site does not have a working PR validation integration.

- Customers with a pre-existing **PR Validation** step for Requisition Workflow can apply this setting to trigger real-time cart validation and real-time validation of flagged fields during workflow approval.

- Pre-existing **PR Validation** workflow steps and the new real-time validation feature can exist congruently. However, if you wish to remove pre-existing workflow validation steps that have been made redundant by real-time validation, please contact JAGGAER to update your workflow.

Configure a Connection to Support PR (optional)

1. Navigate to **Setup** ⚙ **> General Site Settings > Document Export Settings**.

2. Open the appropriate connection configuration.

3. Scroll to the **PR Validation Response Wait Limit (seconds)** setting and fill in the number of seconds that the system will wait for a PR validation response before displaying a message that the connection cannot be completed at this time. **Note:** This setting is located under the **Supports PR** setting.

4. **Save** the changes.

Configure Real-Time Custom Field Validation

Real-time custom field validation is controlled through a new setting on the **Requisition Configuration** page:

1. Navigate to **Setup** ⚙ **> Configure Documents > Configure Requisition Document**.

2. Open the appropriate document configuration or create a new configuration. The page opens to the **General** tab.

3. Scroll to the **Checkout Steps and Navigation** section.

4. Expand the **Enforce External Validation Before Submission by Selecting PR Validation Connection** drop-down, select a connection to use for the validation, and save the

change.

5. Navigate to the **Layout Details** tab and select a field that will have real-time validation.

6. Select the checkbox to **Trigger ERP Validation** in the **Validation** section.

> **Note:** This feature is not limited to accounting codes. Any custom field that has its **Trigger ERP Validation** flag activated will trigger real-time ERP validation. This feature <u>does not</u> require administrators to add a new validation step to their existing workflow.

Non-Catalog Item Configuration

Overview

Non-catalog items are items that are not available from a hosted or punch-out catalog. Non-catalog requests can be entered using forms or by using the **Non-Catalog Item Entry** screen. The tasks in this section focus on configuring the site to allow non-catalog item entry.

For information about setting up non-catalog item *forms*, please see "Forms and Requests Overview" on page 326.

Related Permissions

Permissions for non-catalog item configuration are located under the user profile at **Permission Settings > Shopping, Carts & Requisitions > Shopping.**

- **Non-Catalog Configuration** - **Permission Settings > Shopping, Carts & Requisitions > Shopping**. Users with this permission can modify the standard non-catalog form or item.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Enable and Configure Non-Catalog Item Entry

During implementation, your organization will determine whether or not the non-catalog item entry screen will be used. The purpose of this task is to show system administrators where this option is set up in the system, along with how to configure the screen to meet your organization's business needs.

Enable the Non-Catalog Item Entry Screen

The following administration setting determines whether users see **Non-Catalog Item** or **Non-Catalog Form** options in the shopping links:

1. Go to **Setup** ⚙ **> General Site Settings > Non-Catalog Item Configuration**. The **Non-catalog item configuration** screen displays.

2. Turn on the **Override Default Values** checkbox, then turn on the **Enable non-catalog item entry** checkbox, then click **Save**. The screen expands when this section is made.

   - *If the setting is disabled* - The system will display **Non-Catalog Form** links in application, for example, in the Shop widget. A non-catalog item form type must also exist.
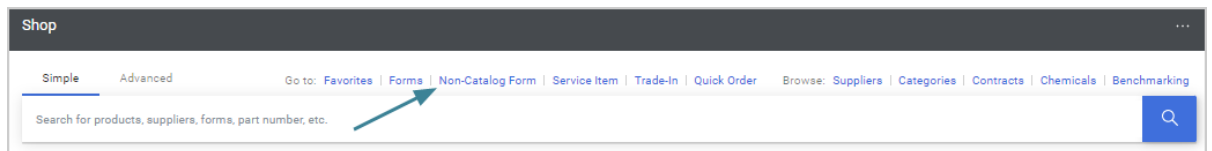
   - *If the setting is enabled* - The system will display **Non-Catalog Item** links in the application and clicking the link will open the Non-Catalog Item overlay. Users can still use a legacy non-catalog forms (if they exist) from Forms links in the application.

Configuring the Non-Catalog Item Entry Screen

1. All options are enabled by default in the non-catalog item entry screen. The settings can be turned on/off as necessary for your organization.

2. Enable or disable the **Allow non-catalog items by default for all suppliers** setting. **This setting should be enabled if the majority of your suppliers can receive non-catalog orders**. This will turn the functionality on for all suppliers and you can disable it for the few suppliers who do not allow non-catalog orders.

3. Configure and review and configure the appropriate fields in the **Supplier** section. These fields determine how users can choose suppliers for non-catalog item entry.

   - **Allow users to choose from a list of known suppliers** - Select this option to allow users to select from a list of suppliers that are manged within the application. **This is the most common method for choosing suppliers**.

   - **Allow users to manually enter ad-hoc suppliers** - This option allows users to enter ad-hoc suppliers that may or may not be managed through the application. **This method is not used frequently**. Only enable this option if you allow your users to enter NEW ad-hoc suppliers and do not require them to use a predefined list of suppliers from your organization.

   - **Allow users to not specify a supplier**- This option allows users to submit a cart without a supplier. Keep in mind, a supplier must be selected before the order is sent to the supplier. There is an assumption that another user (e.g. Approver) would later provide the supplier for a request.

4. In the **Distribution** section is the **Expand distribution options by default** setting. The supplier's distribution options are displayed below the supplier name on the non-catalog item. This setting controls whether the distribution information is expanded (e.g. visible) by default when the user accesses the screen. If this setting is disabled, the user can view the distribution settings by clicking a link to expand the section.

5. Configure the **Product Details** section. This section allows you to determine what fields are visible on the screen, along with other options such as whether prices and catalog numbers are required to submit a line item.

6. Click **Save**.

Enforce a Quantity Limit for Contract Non-Catalog Items

Organizations can enforce a total quantity limit on contract non-catalog items to prevent overspending on a single contract item. They have two options:

- Organizations can enforce the quantity limit by setting a warning or error message to display when the limit set for a contract non-catalog item has been exceeded. This error can be configured to display on draft documents, when a document is submitted into workflow for approval, or when an approver attempts to approve a document. Users will need to adjust the quantity requested or contact the contract manager to change the quantity limit before the order can be completed.

- Optionally, organizations may choose to route documents with one or more contract non-catalog items that have exceeded their purchasing limits to workflow for approvers to review and handle as they wish. This requires JAGGAER-assisted workflow configuration.

If an organization has configured the **Enforce Quantity** validation for contract non-catalog items to Warning or Error, users will see validation messages on requisitions, purchase orders, change requests and invoices if the Enforce Quantity checkbox is selected for a contract non-catalog item and they order more than the maximum quantity allowed for it. Depending on the organization's business processes, users can change the quantity requested or contact the contract manager to change the quantity limit.

How It Works

These fields on the **Contract Non-Catalog Item** overlay control the total quantity limit:

- The **Contracted Quantity** field contains the maximum quantity of the contract non-catalog item that can be purchased.

- The **Enforce Contracted Quantity** checkbox can be selected to enforce the maximum quantity that can be purchased of a contract non-catalog item throughout the eProcurement process.

- The **Total Purchased Quantity** field is a read-only field that is displayed on contract non-catalog items, requisitions, purchase orders, change requests and invoices. It shows the amount that has already been purchased against the contract non-catalog item. This number will change as items are purchased, returned, or canceled, so that the field always displays the current quantity purchased.

On the **Manage Non-Catalog Items** tab on contracts (under contract Goods and Services > Non-Catalog Items > Manage Non-Catalog Items), users can see how many units have been ordered or purchased for a contract non-catalog item, and the number changes in real time as an item is purchased, returned, or canceled.

Contract Amendments and Renewals

The Total Purchased Quantity is accumulated and counted on all contract amendments within a renewal family. When a contract renewal is created, the Total Purchased Quantity will reset to 0. For example, if the Total Purchased Quantity is 5 for a contract non-catalog item and the contract is amended, the Total Purchase Quantity remains at 5 and will increase as items are purchased against it. If the same contract is renewed, the Total Purchased Quantity resets to 0.

Consortium Contracts

Parent organizations in a consortium and will see the Enforce Contracted Quantity and Total Purchased Quantity fields on their contracts. This functionality is not available for consortium member organizations and they will not see the Enforce Contracted Quantity and Total Purchased Quantity fields on contracts.

Enforce a Quantity Limit

1. (optional) Contact JAGGAER to configure workflow settings if your organization wishes to route documents with one or more contract non-catalog items that have exceeded their purchasing limits to workflow for approvers to review and handle as they wish.

2. Configure the default setting for **Enforce Quantity** field at the organization level. **Note:** This does not activate the feature, it controls the default setting for the Enforce Quantity field on contract non-catalog items:

    a. Navigate to **Contracts 🔧 > Contract Administration > General Contract Settings** and click the **General** tab.

    b. In the **Non-Catalog Items** section, set the **Enforce Max Quantity Limit** radio button to **Yes** and save changes. No is the default setting. When this field is set to Yes, any contract non-catalog items created going forward will automatically be set to enforce quantity.

3. (optional) Configure validation for the Total Quantity field and for the Total Quantity workflow on requisition, purchase order and invoice configuration documents. This is similar to how contract spend and contract line item spend validation works:

    a. Navigate to the appropriate document configuration page:

        • *Requisitions* - **Setup 🔧 > Configure Documents > Configure Requisition Document**.

        • *Purchase Orders* - **Setup 🔧 > Configure Documents > Configure Purchase Order Document.**

        • *Invoices* - **Setup 🔧 > Configure Documents > Configure Buyer Invoice Document.**

    b. Open the **Draft** copy of the active document configuration and click on the **Layout Details** tab for requisitions and invoices, or the **Summary** tab for purchase orders.

    c. Select the **Contract** system field for requisitions and purchase orders, or the **Contract No**. system field for invoices.

    d. In the **Validation** section set the validation rules for checkout and workflow and save changes:

- *Checkout* - Under **Checkout validation rules**, set the **If Maximum Total Contract Item Quantity Exceeded** validation rule to Ignore, Error or Warning.

- *Workflow* - Under **Workflow validation rules**, set the **If Maximum Total Contract Item Quantity Exceeded** validation to Ignore, Error or Warning.

   e. Finalize and activate the document configuration.

Integration and Workflow for Non-Catalog Item Entry

If your organization is importing non-catalog items from an integration point from the system, it is important to note how these items are classified within an export document. A non-catalog item has an item type equal to "NonCatalogItem", which is transmitted with the item in any export document. As shown in the example below, the item type is included in the XML for a Purchase Order export:

ProductType>NonCatalogItem</ProductType>

Additional data fields captured on the non-catalog item screen are transmitted in the export document as well. For example:

```
<Item>
  <CatalogNumber>testing catalog</CatalogNumber>
  <Description>testing</Description>
  <ProductUnitOfMeasure type="supplier">
    <Measurement>
      <MeasurementAmount>1.0</MeasurementAmount>
      <MeasurementUnit>EA</MeasurementUnit>
      <MeasurementValue>1.0 EA</MeasurementValue>
    </Measurement>
  </ProductUnitOfMeasure>
  <ProductUnitOfMeasure type="system">
    <Measurement>
      <MeasurementAmount>1.0</MeasurementAmount>
      <MeasurementUnit>EA</MeasurementUnit>
      <MeasurementValue>1.0 EA</MeasurementValue>
    </Measurement>
  </ProductUnitOfMeasure>
  <ProductUnitOfMeasure type="buyer">
    <Measurement>
      <MeasurementAmount>1.0</MeasurementAmount>
      <MeasurementUnit>EA</MeasurementUnit>
      <MeasurementValue>1.0 EA</MeasurementValue>
    </Measurement>
  </ProductUnitOfMeasure>
```

```xml
    <ProductSize type="system">
      <Measurement>
        <MeasurementUnit>1cubic centimeter</MeasurementUnit>
        <MeasurementValue>1cubic centimeter</MeasurementValue>
      </Measurement>
    </ProductSize>
    <ProductSize type="buyer">
      <Measurement>
        <MeasurementUnit>1cubic centimeter</MeasurementUnit>
        <MeasurementValue>1cubic centimeter</MeasurementValue>
      </Measurement>
    </ProductSize>
    <ProductType>NonCatalogItem</ProductType>
    <ProductClassification type="Controlled">false</ProductClassification>
    <ProductClassification type="Green">false</ProductClassification>
    <ProductClassification type="Hazardous">false</ProductClassification>
    <ProductClassification type="Radioactive">false</ProductClassification>
    <ProductClassification type="RadioactiveMinor">false</ProductClassification>
    <ProductClassification type="SelectAgent">false</ProductClassification>
    <ProductClassification type="Toxin">false</ProductClassification>
    <LeadTimeDays />
</Item>
```

Trade-In Configuration

Overview

Customers may need to make purchases for equipment when there is a used piece of equipment they can trade in to offset the cost of a new purchase. The Trade-In feature allows organizations to conduct a Trade-In transaction to make such a purchase. By designating the transaction specifically as a trade-in, customers have additional visibility into these types of transactions and the savings realized. Having this information also gives the customer additional information for fixed asset tracking and tax assessments.

When this feature is enabled, users with appropriate permissions will see the option to add a trade-in item in the shopping quick links, the shopping cart, requisitions and purchase orders. Trade-in items are included in PR and PO exports and imports. The budget check also accounts for trade-in items. Organizations can also route workflow based on trade-in items.

For more information on using the Trade-In functionality while shopping, see "Trade-In Items" on page 160.

Related Permissions

Permission	Location
System Configuration	Permission Settings > Administration > System Administration

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Enable and Configure Trade-In Item Entry

In order to use the Trade-In feature, it must be enabled and configured as follows. The **System Configuration** permission (**Permission Settings > Administration > System Administration**) to perform this task.

1. Go to **Setup** ⚙ **> General Site Settings > Trade-In Configuration**. The **Trade-In Configuration** screen displays. The **Enable trade-in entry** setting is disabled by default.

2. Turn on the **Override Default Values** checkbox, then turn on the **Enable trade-in entry** checkbox, then click **Save**. Additional fields display. Configure the fields as necessary:

   - **Allow trade-ins by default for all suppliers** - By default, no suppliers will have the ability to allow trade-ins unless you enable it on a supplier's profile. Enable this option if you want to allow trade-ins for all of your suppliers by default and the option can be disabled in the supplier profile. If you do not enable this setting, you can turn on the functionality in the individual supplier profiles.

   - **Integration Distribution Type** - This setting controls how the trade-in monetary values will be sent in XML integration points: PR Export, PO Export, Invoice Export, PR Validation, SCT Banner Finance Budget Authorization.

     - **Send with negative monetary values** (default) - If the ERP system can receive negative values, this option should be chosen so that negative values are sent.

     - **Send with positive monetary values** - If the ERP system cannot receive negative values, but can parse the new product type of "TradeIn", then select this option.

     - **Do not send** - If the ERP system cannot receive negative values and cannot parse the product type, choose this option. **Note:** Choosing this option will mean that the ERP system will not match the JAGGAER application totals.

- **SCT Banner: Send Trade-In Value as Discount:** Enable this field if you integrate with SCT Banner Finance and you want to send the trade-in value as a discount in the integration message. Select this setting so that the PR and PO create messages will succeed. Banner Finance will account for the negative trade-in value via the discount field.

- **Supplier Selection Options** (at least one of these options must be selected):

    - **Allow users to choose from a list of known suppliers** - When adding a trade-in item, the user will have the ability to search from active suppliers enabled for trade-in.

    - **Allow users to manually enter ad-hoc suppliers** - When adding a trade-in item, the user will see the option to manually enter supplier information which will include Supplier Name, DUNS No., Supplier Email, Supplier Phone, and Supplier Fax Number. The user will also have to enter Distribution methods for the manually entered supplier.

    - **Allow users to not specify a suppliers** - The user will have the ability to select **Unknown** as a supplier for the trade-in item. This option will likely not be commonly used, but is available if needed by your organization.

- **Product Configuration** options:

    - **Allow empty catalog number** - If this option is enabled, the Catalog Number will not be required when adding a trade-in item.

    - **Allow empty catalog number** - If this option is enabled, the Catalog Number will not be required when adding a trade-in item.

    - **Show product size** - If this option is enabled, the Product Size field will be available for entry when adding a trade-in item, but will not be required.

    - **Show packaging amount** - The Packaging UOM is displayed by default for a trade-in item. However, if this field is enabled, a numeric value for the packaging amount will also be available.

Supplier Profile Configurations

When the Trade-in feature is enabled, a supplier setting for **Allow trade ins** is available on the **About > System Settings** page of the supplier profile. If the organization is configured to allow trade-ins by default for all suppliers, the setting will show a green check. If not, the setting will show a red x. To change the setting, override it by enabling or disabling. Please see "Shopping Configuration Options" in the online searchable help.

Other Configurations to Consider

- **Fields available for document configuration** - **Asset Tag Number** and **Serial Number** are two fields available for trade-in item entry. If you want users to complete this information for trade in times, you may also want to add the fields to your documents. The fields are available for the following documents: Requisition, Purchase Order, Purchase Order Fax, Sales Order, Buyer Invoice. See "Document Setup and Configuration" in the online searchable help for additional information about updating your documents.

- **Integrations**- Trade-in items are supported in PR Import, PR Validation and Budget Check (Banner), PO Import, PO Export and Invoice Export. Additional information:

    - On the **PR Import**, the line will show as a new "Trade-In" product type. The item does not require a negative value, as designating the product type will associate the negative value for the item. **Note:** Your PR DTD may need to be updated.

    - On the **PR Validation and Budget Check**, the amount encumbered for the budget check is the net amount of the linked line items. For example, if the item purchased is $5,000 and the trade-in item is -$1,000, the total amount encumbered will be $4,000 plus tax and shipping.

    - If an export is being sent to an ERP system that will parse the message and store the information in a database, the ERP system must have the ability to receive the negative symbol (-) and interpret the monetary values as negative.

    - Please contact JAGGAER with questions about updating your integration.

- **Workflow Rules**- Workflow objects are available to define workflow rules at the document or line level. Document and line-level rules are available for Requisition, Purchase Order, Sales Order, Buyer Invoice for Advanced Dynamic Workflow. Document and line-level rules can be added for Standard Workflow. For information about updating ADW, please see "Advanced Dynamic Workflow (ADW)" in the online searchable help. For changes to standard workflow or to add a step in ADW, please contact JAGGAER.

Change Request Setup

Overview

Organizations can activate change requests for suppliers or enable a setting that allows change requests to process after new invoices are submitted.

Related Permissions

The **System Configuration** permission (**Permission Settings > Administration > System Administration**) is needed to set up to perform these tasks.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Activate Supplier Change Requests

Buyers often get contacted by suppliers about orders because they need to make a change, such as an update to the delivery date or item quantity. An organization setting allows suppliers to submit change requests for updates to item quantities, delivery dates, or prices on purchase orders and submit them to a buyer. Buyer users can approve or reject the proposed changes through their normal change request approval process in the application.

1. (optional) Contact JAGGAER to configure workflow to route supplier change requests to the PO owner to approve or reject.

2. Enable the organization setting to allow suppliers to create and send change requests from the supplier portal. **Note:** Supplier change requests cannot be sent via cXML.

    a. Navigate to **Setup** ⚙ **> Configure Documents > Configure Change Requests**.

    b. Under **Misc. Settings**, select **Allow supplier change requests** and save changes. The setting is off by default. If the setting is enabled, change requests can be sent by suppliers from the supplier portal to request changes to a purchase order item's delivery date, unit price, or quantity. Enabling this setting causes change request options to be displayed on sales orders in the supplier portal.

    > **Note:** This setting can only be applied at the organization level for all suppliers, i.e., it is on for all suppliers or it is off for all suppliers. It cannot be applied on a supplier by supplier basis.

3. Add the **Reason for Change** field to the **PR document configuration**. This can be done at the line level only.

    - If the field is added to the requisition document configuration, the field will ONLY show on change requests created by a buyer or submitted by a supplier. It is not displayed on PRs and POs.

- On change request line items, it will display the reason for the change that was entered by a buyer or supplier for the line item.

- The field is editable. If the Reason for Change is edited by a buyer user on a supplier change request, the change request history is updated.

Buyer users can subscribe to the **Supplier Change Request Submitted into Workflow** notification to be notified that a supplier has submitted a change request for one of their purchase orders.

Allow Change Requests to Process After New Invoices are Submitted

By default, if a change request is submitted for a purchase order, and a new invoice is submitted for the same order while the change request was in Draft or Pending status, the change request cannot be processed and a new change request will need to be created.

However, organizations can enable setting that allows change requests to be processed even if an invoice is created while a change request is in Draft or Pending status. If this setting is enabled, a second, optional, setting can be enabled to allow the automatic re-opening of closed purchase orders so that request changes can be merged to the PO's.

How It Works

When a change request is in Draft or Pending status and an invoice is submitted for the same PO, organization settings will determine what happens next:

- If organization settings **DO allow change request processing** when new invoices are created and **DO allow re-opening of closed purchase orders** related to the change request:

  - **Open PO's** - Users may proceed with the change request.

    - A message will indicate that a new invoice has been submitted after the change request was created, and that users may proceed.

    - When the change request is approved, the request changes are merged to the PO. The history will indicate the change request changes and the change request number.

  - **Closed PO's** - The closed PO will automatically be re-opened when the change request is approved.

- A message on the change request will indicate that a new invoice has been submitted after the change request was created, the related purchase order has been closed due to an invoice submission, and that when the change request is approved, the PO will automatically be re-opened.

- When the change request is approved, the PO will be re-opened and the request changes will be merged to the PO. The PO will not be re-closed.

- A comment will be added to the PO and the history will be updated to indicate that the PO was automatically opened due the change request, and show the change request number.

- If organization settings **DO allow change request processing** when new invoices are created but **DO NOT allow re-opening of closed purchase orders**:

  - **Open PO's** - Users may proceed with the change request.

    - A message will indicate that a new invoice has been submitted after the change request was created, and that users may proceed.

    - When the change request is approved, the request changes are merged to the PO. The history will indicate the change request changes and the change request number.

  - **Closed PO's** - A new change request will need to be created (this is existing functionality).

    - A message on the change request will indicate that the related purchase order has been closed due to an invoice submission, invalidating the change request, and that a new change request will need to be created.

    - Users cannot submit the change request for approval.

- If organization settings **DO NOT allow change request processing** when new invoices are created (existing functionality):

  - **All PO's** - Change requests in Draft or Pending status cannot be processed if a new invoice is submitted, and a new change request will need to be created.

    - A message on the change request will indicate that the related purchase order has been closed due to an invoice submission, invalidating the change request, and that a new change request will need to be created.

    - Users cannot submit the change request for approval.

Enable this feature as follows:

1. Navigate to **Setup** ⚙ **> Configure Documents > Configure Change Request**.

2. Under **Misc. Settings**, the **Allow Change Request processing when new Invoices are submitted** setting determines whether a change request in Draft or Pending status can be processed if a new invoice is submitted for the same PO:

   - If this setting is **OFF** - Change requests in Draft or Pending status cannot be processed if a new invoice is submitted for the same PO. A message on the change request will indicate that an invoice was created after the change request, invalidating the change request, and that a new change request will need to be created. The setting is off by default. This is current functionality.

   - If this setting is **ON** - Change requests in Draft or Pending status can be processed if a new invoice is submitted for the same PO. If this setting is enabled, the **Allow automatic re-open of PO if required** option is displayed.

3. If the setting above is enabled, the **Allow automatic re-open of PO if required** option is displayed and determines what happens to closed purchase orders when a change request is in Draft or Pending status and a new invoice is submitted for the same PO:

   - If this setting is **OFF** - A message will indicate that the purchase order is closed and that a new change request will need to be created. Users will not be able to submit the change request for approval. The setting is off by default.

   - If this setting is **ON** - When the change request is approved, the closed PO will be automatically re-opened and the changes will be merged to the PO. The PO will not be re-closed.

4. Click **Save**.

> **Note:** Related to this feature, another setting allows customers to use the original PO quantities on change requests or only the non invoiced quantities. See Change Request Options and **New Change Request Setting** in the August 19, 2021 maintenance release notes for more information.

Ability to Submit Change Requests for Fully Invoiced Lines

In some cases our customers can receive additional invoices for purchase orders after they have been fully invoiced. A change request configuration setting allows fully invoiced lines to be viewed and edited on change requests, and users don't have to manually make changes to increase the amount of a purchase order if they receive additional invoices after it has been fully invoiced. This setting only applies to fully invoiced lines, over-invoiced lines are always allowed.

> **IMPORTANT NOTE:** Enabling this setting means that fully invoiced lines will always get copied to a change request, and fully invoiced purchase orders will always allow change requests to be created. A validation message will let users know after a draft change request is created that the purchase order has fully invoiced lines and that matching may not be correct, but the invoiced lines will already be on the change request and can't be deleted. However, the user may leave them unchanged, and they will not impact the purchase order. Administrators can edit the validation message that is displayed in Field Management.

Enable the setting as follows:

1. Navigate to **Setup** ⚙ **> Configure Documents > Configure Change Request**.

2. Under the **Misc. Settings** sub-heading, select the checkbox next to **Allow fully invoiced PO lines on Change Request**.

    - *When the setting is ON* - Fully invoiced lines can be modified and submitted on change requests. **Note:** This setting only applies to fully invoiced lines, over-invoiced lines are always allowed.

    - *When the setting is OFF* - Fully Invoiced lines cannot be modified and submitted on change requests.

3. Click **Save**.

Enable Change Request Custom Field Validation

The following setting can be enabled to enforce validation settings for custom fields on change requests. The system will display warning or error messages, or prevent a change request from being submitted for approval, based on validation settings on the requisition document configuration.

Enable the setting as follows:

1. Navigate to **Setup** ⚙ **> Configure Documents > Configure Change Request**.

2. Under the **Misc. Settings** sub-heading, select the checkbox next to **Validate Custom Fields on Change Requests**.

    - *When the setting is ON* - The system will display warning or error messages, or prevent a change request from being submitted for approval, based on validation settings on the requisition document configuration.

- *When the setting is OFF* - There is no validation for custom fields on change requests. The setting is off by default.

3. Click **Save**.

Validation can be set for a custom field on the requisition document configuration as follows:

1. Navigate to **Setup** ⚙ **> Configure Documents > Configure Requisition Document**.

2. Open the **Draft** copy of the active document configuration and click the **Layout Details** tab.

3. Select the **custom field** to update.

4. In the right panel, in the **Validation** section, set the **If empty** and **If invalid** fields to one of these options:

   - **Ignore** - The application does not check values entered in the field.

   - **Warning** - The application displays a warning message if the field value does not meet the selected condition, but the user can submit the document for approval.

   - **Error** - This option makes the field required. The user is not allowed to submit the document for approval if the field value does not meet the selected condition.

5. Save, finalize, and activate the document configuration.

Ad-Hoc Approver Setup

Overview

The ad-hoc approver feature is used to accommodate situations where a one-time approval is needed from a user who is not in the regular approval workflow. It can be configured for use in two places on requisitions:

- **Requisition Workflow** - - The ad-hoc approval option can be configured for requisition workflow steps. The person who is approving a requisition on a workflow step will have the option to assign a requisition to an ad-hoc approver, who can then can approve the requisition to send it to the next workflow step, or send it to a different ad-hoc approver if they have the appropriate permissions.

- **Draft carts** - Users can assign an ad-hoc approver to their draft requisition or change request prior to submitting the requisition or change request for approval. They can also specify where in the requisition workflow that the approval takes place.

Who can be an ad-hoc approver?

- Only users who have the **Perform Requisition Ad-Hoc Approvals** permission are available for selection as ad-hoc approvers.

- If an organization restricts searches by business unit, those settings will affect the users who are available for selection as ad-hoc approvers.

- A user who has an active substitute approver cannot be selected as an ad-hoc approver.

- An approver cannot select themselves as an ad-hoc approver.

Additional Information

- Adding an ad-hoc approver to a requisition affects that record only. They are not added as approvers to any other requisition.

- Only one ad-hoc approver can be selected on a workflow step. If there are multiple approvers for a step, only one of them can designate an ad-hoc approver.

- An ad-hoc approver can assign a different ad-hoc approver if they have the Ad-Hoc Approver for Requisition Approvals permission.

- Administrators with the appropriate permission can approve on behalf of designated ad-hoc approver.

Related Permissions

Permission	Description	Location
Add Ad-hoc approver to draft Cart	Users with this permission can assign an ad-hoc approver to their draft requisition or change request prior to submission and specify where in the requisition workflow that the ad-hoc approval should take place.	Permission Settings > Shopping Carts & Requisitions > Cart/Requisition
Perform Requisition Ad-Hoc Approvals	The users who can be selected as ad-hoc approvers on the step must have this permission.	Permission Settings > Approvals> Requisition Approvals

Users with the existing **PR pending Ad-Hoc Workflow approval** (Notification Preferences > Shopping, Carts & Requisitions) notification enabled will receive a notice when the requisition workflow reaches a draft ad-hoc approval step.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Set Up the Ad-Hoc Approver Feature for Requisition Workflow

The Ad-Hoc Approver feature allows a requisition approver to send it to a user who is not in the regular workflow for a one-time approval. The ad-hoc approver can approve the requisition to send it to the next workflow step, or send it to a different ad-hoc approver if they have the appropriate permissions.

The steps below show how to enable the feature for purchase requisitions.

1. Enable the Ad-Hoc Approver feature for the organization.

    a. Navigate to **Setup** ⚙ **> Workflow Setup > General Workflow Settings**.

    b. In the Workflow Options section, select the checkbox next to **Allow users to add ad-hoc approvers for requisitions** to enable the feature for your organization. This makes the Add Ad-Hoc Approver for Requisitions Approvals and Perform Requisition Ad-Hoc Approvals permissions visible in the application. The setting is off by default.

2. Add the Ad-Hoc Approver element to the active Requisition Document configuration.

    a. Navigate to **Setup** ⚙ **> Configure Documents > Configure Requisition Document**.

    b. Open the **Draft** version of the active requisition document configuration.

    c. Click the **Layout Details** tab.

    d. Expand the **All fields** option and select **Ad-Hoc Approver**.

    e. In the panel on the right, complete these fields:

        - **Editable by header / line** - Select **Header only**.
        - **Review page placement** - Select the section to display the Ad-Hoc Approver field in, such as General.

    f. Configure additional options and click **Save**.

    g. **Finalize** and **activate** the version.

3. Set up users or user roles with following permissions. There are two types of user permissions to grant – users who can add an ad-hoc approver and users who can be selected as an ad-hoc approver:

Users who can add an ad-hoc approver

- The **Add Ad-Hoc Approver for Purchase Requisitions Approvals** (Permission Settings > Approvals > Requisition Approvals) permission allows a requisition approver to send the document to a user who is not in the regular approval workflow for a one-time approval. Users with the permission can select, change or delete an ad-hoc approver while they are an approver assigned to a requisition. They cannot modify other fields unless they also have editing permissions.

> **Note:** These users also need the **Approve/Reject Requisitions** permission, as they need to be an approver assigned to the requisition before they can select an ad-hoc approver.

Users who can be selected as an ad-hoc approver

- The **Perform Requisition Ad-Hoc Approvals** (Permission Settings > Approvals > Requisition Approvals) permission allows users to accept or reject requisitions only as an ad-hoc approver and at no other time.

> **Note:** The **PR pending Ad-Hoc Workflow approval** notification is available to users with this permission to alert them that they have been assigned to a requisition as an ad-hoc approver and that it is awaiting their approval. It is located under **Notification Preferences > Shopping, Carts & Requisitions**.

4. (optional) The **Comments** field on the Ad-Hoc Approver overlay can be made mandatory through Field Management settings, so that users are required to enter a comment when adding or changing an ad-hoc approver. This setting applies to the Comments field for both invoices and requisitions. For example, once the setting is changed for invoices, it will also be changed for requisitions, and vice versa. The field is not required by default.

   a. Navigate to **Setup** ⚙ **> Field Management > Manage Field Name and Help Text**.

   b. In the **Browse Fields** panel, choose one of the following paths to open the Comments field.

      - Orders - Requisitions - Elements - Ad-Hoc Approver - Select - Comments *or*
      - Accounts Payable - Buyer Invoice - Elements - Ad-Hoc Approver - Select - Comments.

   c. Select the checkbox next to the **Required** setting to enable the checkbox.

   d. Select the **Required** checkbox.

   e. Click **Save**.

Once the configuration is complete, the **Ad-Hoc Approver** field is visible on the requisition header to users with the Ad-Hoc Approver permission who have been assigned to an approval workflow step. Clicking the **Select** link opens a window where they can choose an ad-hoc approver.

Set Up the Ad-Hoc Approver Feature for Requisition Draft Carts

If the ad-hoc approver for draft carts feature is enabled, users with the appropriate permission can assign an ad-hoc approver to their draft requisition or change request prior to submitting the requisition or change request for approval. They can also specify where in the requisition workflow that the approval takes place.

The steps below show how to enable the feature for draft carts.

1. Enable the setting to allow ad-hoc approvers to be added to draft requisitions or change requests:

    a. Navigate to **Setup** ⚙ **> Workflow Setup > General Workflow Settings**.

    b. Under the **Workflow Options** heading, select the checkbox next to **Allow users to add ad hoc approvers for draft cart**. This allows users with the appropriate permissions to assign an ad-hoc approver while their requisition or change request is in Draft status. The setting is Off by default.

    c. Save changes.

2. Ensure the **Ad-Hoc Approver** field is on the requisition document configuration. This is not a new field, but it must be on the active requisition document configuration:

    a. Navigate to **Setup** ⚙ **> Configure Documents > Configure Requisition Document**.

    b. Open the **Draft** copy of the active requisition configuration.

    c. Click the **Layout Details** tab.

    d. Add the **Ad-Hoc Approver** field to the document configuration.

    e. Save changes, then finalize and activate the configuration.

3. Assign the new **Add Ad-hoc approver to draft Cart** permission to user roles or user profiles. Users with the permission can assign an ad-hoc approver to their draft requisition or change request and specify where in the requisition workflow that the ad-hoc approval should take place.

   a. Open the user role or user profile.

   b. Navigate to **Permissions** (user roles) or **Permission Settings** (user profiles) **> Shopping Carts & Requisitions**.

   c. In the **Cart/Requisition** section, enable the **Add Ad-hoc approver to draft Cart** permission.

   > **Note:** The users who can be selected as ad-hoc approvers on the step must have the **Perform Requisition Ad-Hoc Approvals** permission (Permission Settings > Approvals> Requisition Approvals).

Order Distribution Management

Overview

Order Distribution refers to the way in which a purchase order is sent to a supplier. JAGGAER provides various methods for distributing purchase orders created in the system. Some organizations send purchase orders to suppliers via the JAGGAER application. Other JAGGAER order delivery options include fax, email, electronic delivery (cXML) and manual.

Most default order distribution elements are configured during initial implementation and the settings can then be overridden at the supplier or purchase order level within an organization's site. However, it is important for administrators to understand the order distribution process and how to troubleshoot any issues that may arise.

The specific addresses for fax and email delivery are configured on this page, along with more specific order options. You must contact JAGGAER to configure cXML purchase order integration; however, options for utilizing that delivery method can be managed from this page.

JAGGAER has a very HIGH success rate for PO delivery on first attempt - 99.76%. Most failures can be attributed to human error such as entering a fax number incorrectly. For this reason, we highly recommend cXML order delivery whenever it is available, due to its dependability and fast turnaround time.

For information about overriding the distribution defaults on a PO, please see Purchase Order Functions.

Order Delivery Options

- **Fax** - You may choose to allow all orders, or only those orders that cannot be sent via another method, to be sent via fax. You will provide the number for delivery on this page.

- **Manual** - Manual distribution occurs when orders are printed out or called in, and not sent directly to the supplier through the application. This option is typically disabled at the organization level, but is enabled for specific suppliers as appropriate.

- **Email** - You have several options for email order delivery. You will configure the name, subject, and reply to email address for all orders using this method. You can then select if you want orders to be sent via plain text, with order details in HTML format contained in the body of the email, with order details in an HTML formatted file attached to the email, or with order details in a PDF formatted file attached to the email. For each of these options, you can configure a separate email address. **Note:** You can configure if orders that contain credit cards will be sent via email. The default selection is that such orders cannot be sent via email.

- **cXML** - Orders are delivery electronically to the supplier via a purchase order integration point. You must contact JAGGAER to enable this functionality.

Related Permissions

- The **System Configuration** permission (Permission Settings > Administration > System Administration) is needed to define distribution defaults for the organization.

- The **Modify Order Distribution for Forms and POs** permission (Permission Settings > Shopping Carts & Requisitions > Shopping) is needed to override fax or email distribution on purchase orders.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

Defining Distribution, Order and Supplier Defaults for Catalog Orders

Generally, an organization's default PO distribution methods are determined during implementation. However, it may be necessary to add or remove a method or to make updates to an existing method. This task focuses on making updates to the order distribution defaults. **Note:** You must contact JAGGAER to enable cXML order distribution.

When editing values on this page, you must first select the **Override Default Values** checkbox for the field.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Default Ordering Settings (eg., Tax, S&H, Payments**. The **Payment Method** screen is displayed by default.

2. Click the **Ordering** tab. The **Distribution, Order & Supplier Defaults** sub-tab displays by default. The active purchase order document distribution configuration is displayed.

3. In the **Distribution, Order & Supplier Defaults** sub-tab, configure the information in the following sections and fields as necessary:

Fax, HTML Body and HTML Attachment Configuration

- **Configuration** - Displays the fax configuration to be used when generating the supplier document. This applies to fax, Email (HTML Body), Email (HTML Attachment) and Manual distribution methods. It is not editable.

Fax

- **Send POs via Fax** - Enable this setting to distribute all purchase orders from the application via fax.

- **Send POs via Fax for forms and non-catalog items when electronic integration is not available** - Enable this setting to send POs via fax ONLY in the event that electronic ordering is not available with a supplier for forms and non-catalog orders.

- **Fax Number** - You have the option to enter a default fax number for delivery but this should be overridden at the supplier level with the supplier's fax number.

Manual

Manual distribution means that the PO is created in JAGGAER but is printed and distributed manually (mailed for example) vs. being sent from the application. Configure the fields in the **Manual** section to determine whether or not your organization will allow manual distribution.

- **Enable Manual Distribution** - Enable this setting to distribute all POs manually. **Note:** This is not a typical configuration.

- **Enable manual distribution for forms and non-catalog items when electronic integration is not available** Enable this setting to distribute POs manually ONLY in the event that electronic ordering is not available with a supplier. This option is standard for form and non-catalog ordering.

General Email Settings

Configure email delivery options for order distribution in this section. Email POs can be delivered as text or in HTML format. There are configuration sections for each type. When you enable POs to be delivered in text or HTML format, you are essentially enabling email PO distribution.

- **Subject** - By default, the email PO to a supplier contains the subject of **JAGGAER PO**. You can override this with customized text in this field.

- **From Name** - The email purchase orders sent to suppliers are sent from support@jaggaer.com, since JAGGAER is responsible for order delivery. However, you may choose to add your organization's name or another identifier to the front of the email address by selecting to "Override Default Values" for the From Name. The value here will appear in front of the support@jaggaer.com address in the email that is sent to the supplier.

- **Reply To** - Enter the default "reply to" email address.

- **Exclude order confirmation link from HTML order distribution emails** - **This link is enabled by default.** By default, an Order Acknowledgment (OA) link is included in order distribution emails. When suppliers click the link, they are directed to a web form where they can create an order acknowledgment quickly and easily without logging into the network or supplier portal. The link can be *disabled* by overriding the default settings and selecting the checkbox.

Email (Plain Text)

Configuring email plain text order distribution. With this option enabled, orders will be sent via email, with the order information contained in the body of the email in plain text format.

- **Send POs via Email: Plain Text format** - Enable this option to distribute all POs via plain text email.

- **Send POs via plain text Email for forms and non-catalog items when electronic integration is not available** - Enable this setting to distribute the PO via plain text email ONLY in the event that electronic ordering is not available with a supplier for forms and non-catalog orders. This option is standard for form and non-catalog ordering.

- **Email Address** - You have the option to enter a default email address for delivery but this should be overridden at the supplier level with the supplier's email address.

Email (HTML Body)

Configuring email HTML Body order distribution. With this option enabled, orders will be sent via email, with the order information contained in the body of the email in HTML format.

- **Send POs via Email: HTML in the body** - Enable this option to distribute all POs via HTML email.

- **Send POs via HTML in the body Email for forms and non-catalog items when electronic integration is not available** - Enable this setting to distribute the PO via HTML email ONLY in the event that electronic ordering is not available with a supplier for forms and non-catalog orders. This option is standard for form and non-catalog ordering.

- **Email Address** - You have the option to enter a default email address for delivery but this should be overridden at the supplier level with the supplier's email address.

Email (Attachment)

Configuring email (HTML Attachment) order distribution. With this option enabled, orders will be sent via email. Organizations can choose to send the order information formatted as an HTML attachment to the email, or as a PDF attachment to the email. **Note:** Either the HTML Attachment format or the PDF Attachment can be used for email delivery distribution orders. Users cannot select both formats at once.

- Select one:

  - **Send POs via Email: HTML Attached** - Enable this option to distribute all POs via email, and the purchase order information is attached to the email and not included in the body of the email. The attachment uses the HTML format that is used with faxed POs. If this option is selected, the **Send POS via Email: PDF Attached** option is grayed out and cannot be selected.

  - **Send POs via Email: PDF Attached** - Enable this option to send purchase orders to suppliers via an email with a PDF attachment instead of an HTML attachment. If this option is selected, the **Send POS via Email: HTML Attached** option is grayed out and cannot be selected. This setting is Off by default.

- **Send POs via HTML attached email for forms and non-catalog items when electronic integration is not available** - Enable this setting to distribute the PO via HTML email with the purchase order information attached to the email, ONLY in the event that electronic ordering is not available with a supplier for forms and non-catalog orders.

- **Email Address** - You have the option to enter a default email address for delivery but this should be overridden at the supplier level with the supplier's email address.

cXML Settings

Most cXML configuration tasks are done by JAGGAER. However, there are some options related to cXML delivery that can be configured by an administrator.

- **Prevent users from adding external notes to cXML lines** - Enable this setting to disallow users to add external notes to the PO lines send via cXML. Turning this setting on will prevent users from adding external notes to any lines that are sent to all suppliers using cXML order integration. This setting is only applicable to cXML enabled suppliers. If the supplier is cXML enabled for hosted and punch-out items but receives non-catalog items and forms via fax, then this setting will only apply to lines containing hosted and punch-out items. When this setting is on, shoppers will see the external notes field on the line but it will be disabled with a message that the supplier does not accept notes. External Notes (Notes to All Suppliers) can still be added to the header of the requisition but the shopper will receive a warning listing the suppliers on the requisition who do not accept notes

- **Prevent users from adding external attachments to cXML lines** – Enable this setting to disallow users to add external attachments to PO lines sent via cXML. Turning this setting on will prevent users from adding external attachments to any lines that are sent to all suppliers using cXML order integration. This setting is only applicable to cXML enabled suppliers. If the supplier is cXML enabled for hosted and punch-out items but receives non-catalog items and forms via fax, then this setting will only apply to lines containing hosted and punch-out items. When this setting is on, shoppers will see the external attachments field on the line but it will be disabled with a message that the supplier does not accept attachments. Attachments can still be added to the header of the requisition but the shopper will receive a warning listing the suppliers on the requisition who do not accept attachments.

- **Prevent users from selecting the Ship Via option on cXML lines** – Enable this setting to disallow users to select a Ship Via option on PO lines sent via cXML. Turning this setting on will prevent users from selecting a Ship Via option on lines

that are sent to all suppliers using cXML order integration. This setting is only applicable to cXML enabled suppliers. If the supplier is cXML enabled for hosted and punch-out items but receives non-catalog items and forms via fax, then this setting will only apply to lines containing hosted and punch-out items. When this setting is on, shoppers will see the Ship Via field on the line but it will be disabled with a message that the supplier does not support the field. Ship Via can still be selected at the header of the requisition but the shopper will receive a warning listing the suppliers on the requisition who do not support the field.

- **Prevent users from selecting a Requested Delivery Date on cXML lines** - Enable this setting to disallow users to add a Requested Delivery Date on PO lines sent via cXML. Turning this setting on will prevent users from adding a Requested Delivery Date to any lines that are sent to all suppliers using cXML order integration. This setting is only applicable to cXML enabled suppliers. If the supplier is cXML enabled for hosted and punch-out items but receives non-catalog items and forms via fax, then this setting will only apply to lines containing hosted and punch-out items. When this setting is on, shoppers will see the Requested Delivery Date field on the line but it will be disabled with a message that the supplier does not support the field. A Requested Delivery Date can still be added to the header of the requisition but the shopper will receive a warning listing the suppliers on the requisition who do not support the field.

- **Allow suppliers to override price, tax and shipping charges on Purchase Orders using cXML Order Acknowledgments** - Allows a supplier to update the prices on a purchase order document using order acknowledgments. If the setting is ON, if a supplier sends a different price from the price on the original PO, then the purchase order will be updated with the prices that were sent in the order acknowledgment. The purchase order will now reflect the supplier's pricing and not the pricing that was on the official PO at distribution time. If the setting is OFF, suppliers are not allowed to update pricing on the purchase order. If the supplier sends prices in the order acknowledgment that are different from the prices on the original purchase order, then the prices on the purchase order are not updated but the purchase order's history will show that the supplier sent a different price in the order acknowledgment than what is on the purchase order.

Miscellaneous

- **Create PO** - Enable this setting to create orders in the system (standard choice). For organizations that punch-in to the JAGGAER site, PR workflow is required to create a PO.

- **Exclude from Cart Return** - This setting directs products to the appropriate system. If set to True, the purchase requisitions are created and processed within the application. If set to False, the products are sent to an external system for processing. This is both an organization setting and a supplier fulfillment center setting. The supplier setting overrides the organization setting.

- **Use PR Workflow for punch-in requisitions** - If your organization punches in to JAGGAER from another application. Select *Never* if you never want PR workflow to be used. Select *Always* if you always want it to be used. Select *If Exclude from cart return = True* if your organization has mixed cart return settings. For purchase requisitions that are processed within JAGGAER, PR workflow is used. Those purchase requisitions that are processed in an external system do not proceed through PR workflow.

- **Allow orders with credit cards to distribute via Email (card number will be masked)** - Enable this setting only if you want to allow orders that contain credit card information to be distributed via email. Credit card number will be masked. With this option disabled (default), orders that contain a credit card will not be distributed via email.

- **Allow Supplier Order Confirmations through Portal and Email** - Select the checkbox if your organization wants to receive order acknowledgments (OAs) from all suppliers through the supplier portal and email. The setting is Off by default. This setting can also be configured on individual supplier profiles under eProcurement > Integration settings. The settings configured on a supplier profile will remain in place even if the global setting is changed.

- **Receive Portal Advanced Ship Notice Messages** - Select the checkbox if your organization wants to receive advanced shipping notices (ASNs) from all suppliers through the supplier portal and email. The setting is Off by default. This setting can also be configured on individual supplier profiles under eProcurement > Integration settings. The settings configured on a supplier profile will remain in place even if the global setting is changed.

4. Click the **Save** button when all edits have been made.

5. Set additional configurations for free-form suppliers and supplier fulfillment addresses on the **Order Distribution Options** sub-tab (below).

Define Order Distribution Option Defaults for Forms and Non-Catalog Item Orders

Special settings are provided for distribution of orders produced from forms, including the non-catalog form, and for orders that have been edited prior to completion and after delivery (change orders). For example, you organization may only want change orders and non-catalog orders to be faxed, although standard orders can use email.

The options are the same as for standard orders, but these options will only apply to forms, non-catalog, and change orders. The selections will show on forms and non-catalog item orders as options for distributing the purchase order. The values for the options will be the same as those set as organization defaults, but can be modified by selecting a different option.

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Default Ordering Settings**. The **Payment Method** screen is displayed by default.

2. Click the **Ordering** tab. The **Distribution, Order & Supplier Defaults** sub-tab displays by default.

3. Click the **Order Distribution Options** sub-tab.

4. Enable the appropriate checkboxes based on which types of order delivery you would like to allow for forms, including non-catalog forms and items, and modified orders. One or more checkboxes can be enabled.

- **Fax** - Fax the PO in the standard PO format.

- **Email (Plain Text)** - Email the PO using a plain text PO format. (Some suppliers may request this format because their email system will not allow them to receive HTML documents.

- **Email (HTML Body)** - Email the PO using the standard PO format (HTML, not plain text) and display the PO information directly in the body of the email.

- **Email (HTML Attachment)** - Email the PO using the standard PO format (HTML, not plain text) but include it as an attachment to the email instead of in the body.

- **Email (PDF Attachment)** - Email the PO via an email with a PDF attachment instead of an HTML attachment.

  > **Note:** Either the PDF Attachment or the HTML Attachment format can be used for email delivery distribution orders. They cannot both be listed as a distribution method.

- **Manual** - Create a PO that can be distributed manually.

5. If the **Email (PDF Attachment)** option has been selected above, go to the **PDF PO Format Option** section and select the default orientation of PDF purchase orders in the **PDF Orientation** field.

6. Click **Save**.

Overriding Distribution at the Supplier Level

A critical part of managing the supplier profile is defining order distribution information, which determines distribution method (fax, email, or cXML) and destination (fax number and email address). This information must be set up for all types of suppliers – hosted, punch-out, and non-catalog.

By default, the organization-wide order distribution setting display for a supplier. These are overridden by:

- Changes that are made manually in the supplier profile
- The Supplier Import
- ERP Supplier syncs

Standard order distribution information will be set up in the system for each supplier, specifically each supplier fulfillment address. This is information provided by the supplier as their "standard" fax number or email address. If orders need to be sent to a different fax number or address (perhaps to an account representative), the organization is responsible for updating this information.

The system can send orders via multiple methods simultaneously. For example, for a period after initial implementation, it may be a requirement to send an internal email to the purchasing team each time an order is faxed to a supplier. To do this, the organization selects both email and fax as order distribution options. After the process has been verified, the email distribution to purchasing is turned off.

Note: Multiple destinations per delivery method is not supported. For example, the application cannot fax to multiple fax numbers. Only users with the **Manage Supplier Profiles** permission can modify supplier-specific distribution settings.

1. Search and locate the supplier that you would like to update.

2. From the supplier search results, click on the name of the supplier in the **Supplier Name** column. The supplier profile displays.

3. Click on the **Fulfillment Centers** tab. The current Fulfillment Centers display on the left side of the screen. Additionally, you can set up Order details for all fulfillment centers by selecting **Default Settings for this Supplier**.

   > **Note:** if you do not see this option in your screen, contact JAGGAER Support to have this feature enabled.

4. To define order information for a specific location, click the appropriate fulfillment center in the left-hand table OR click **Default Settings for this Supplier** to update all locations for the supplier. Once an option is selected, information on the right side of the screen displays.

5. Click on the **Order Distribution** tab within the fulfillment center.

6. Review the current order distribution information. Basic information about order delivery:

   - Each type of order delivery method is listed on this tab, along with indication if that particular method is activated. A red X indicates the distribution method is not currently enabled, and a green check indicates the distribution method is currently enabled.

- A warning message displays if an order distribution method has not been set up for the supplier location (fulfillment address). In some cases, this is purposeful and is not an issue. For example, eProcurement only clients will not have order distribution defined for most of their suppliers.

7. Enabling order delivery: At least one order delivery method should be set up for each supplier that may receive orders. The types of order delivery are listed below:

   a. **Fax:** Sends a purchase order to a fax machine/number. Enter the country code, Area Code and phone number into the field below the fax indicator.

   b. **Manual** - This Order Distribution option creates a fax version of the PO but does not distribute the PO by email or fax. This can be to print the PO and mail to the supplier or save a hard copy of the PO.

   c. **Email Orders (Plain Text):** Sends a purchase order to the email address listed. Plain text Purchase Orders may not format as precisely as a faxed PO. This method is only suggested when the email address receiving the order does not support HTML. Enter the email address below the email (plain text) indicator.

   d. **Email Orders (HTML in Body):** Sends a purchase order to the email address listed. HTML in Body emails are formatted to appear exactly as the faxed PO. Enter the email address below the email (HTML in Body) indicator.

   e. **Email Orders (HTML Attached):** Sends a purchase order to the email address listed. There are two options:

      - **Send POs via Email: HTML Attached** - HTML Attached Purchase Orders are an email with no body; however, the Purchase Order is attached and formatted exactly as the Faxed PO. Enter the email address below the email (HTML Attached) indicator.

      - **Use PDF Attachment instead of HTML** - Sends purchase orders to the supplier via an email with a PDF attachment instead of an HTML attachment.

        > **Note:** Either the PDF Attachment or the HTML Attachment format can be used for email delivery distribution orders. They cannot both be listed as a distribution method.

   f. **cXML Orders:** This option only displays if the JAGGAER Supplier Enablement project manager has enabled electronic order distribution for the supplier. cXML configuration is performed by JAGGAER and is not editable.

8. At the bottom of the order distribution tab, the Create PO and Exclude From Cart Return options are available.

9. After making any updates, click the **Save** button.

Troubleshooting Order Distribution Failures

Each PO has a History tab. This tab reflects all activity related to the PO including its delivery status. Checking this status is a good first step for troubleshooting any distribution issues. Once an issue has been identified, steps can be taken to correct the problem.

cXML Order Status

cXML order failures are logged in the PO History. The failure is noted along with the failure reason. JAGGAER is responsible for handling cXML order failures by resending the order OR contacting/notifying the supplier (as a first step in the correction process). Common failure types:

- **Technical issues such as timeout connection to the supplier** - Users can see this issue in PO History, but the client has NO responsibilities for this type of failure. It is the responsibility of JAGGAER to ensure the supplier receives the order (i.e., we will resend until it is successful).
- **Address failures due to an address being sent that the vendor doesn't recognize**. *Short-term fix*: JAGGAER sends the new address to supplier so that order can be processed. *Long-term fix*: It is the responsibility of the client to update cXML suppliers with new or modified addresses.
- **Catalog issues** - For example, when a product is no longer available. JAGGAER sends the error message to the supplier, then the supplier is responsible for contacting the user to verify the substitute item is acceptable.

Email Order Status

Email failures are not logged in PO History. The history only indicates if an email was sent. A separate system managed by JAGGAER Support identifies if an order could not be sent to the designated address. A notification is sent directly to JAGGAER Support. From there, JAGGAER Support will send an email with the relevant information to the primary client contact, including an attachment of the original Purchase Order.

Once the client receives the issue notification, he/she will typically forward the attached PO to the right address. Another option is to update delivery information – email or fax - in the application and resend the order.

Fax Order Status

Fax order delivery failures are logged in the PO History. If the destination fax line is busy, the system will try to resend the fax 10 times over a 30-minute period before it considers it 'failed'. Other reasons the fax may considered failed may be that the there was no answer, no fax tones were detected, or the line gets disconnected.

To ensure data integrity, JAGGAER Support does not make changes to your Production Supplier information – including the distribution information. The two cases where JAGGAER will resend failed fax orders when the order fails due to a connection or technical issue or the number is an invalid number that originate from a JAGGAER default supplier order distribution method.

Organization administrators are able to manage and resend faxed POs that failed.

Related Notification

The **Prepared By - PO Distribution Failure Notice** notification alerts the "Prepared By" user of an order distribution failure. The notification is located in **Notifications > Administration & Integration** in the user profile or role setup. For additional information about setting notification preferences, please see in the **Site Essentials Handbook** or online searchable help.

You must have the **Manage Order Failure Notifications** permission to perform this task at the organization level. You must have the **Manage Business Unit Order Failure** Notifications permission to perform this task for a business unit. If you have both permissions you will be able to filter by BU. These permissions are located in **Permission Settings > Orders > My Orders/Organization Orders**.

1. Go to **Administer** **> Find and Fix Errors > Purchase Order Export Errors**.

2. By default, all active issues display. To filter the results by supplier or failure type, make those selections from the appropriate drop-down box.

3. Enable the **Select** checkbox to the right of the PO, select the appropriate option from the drop-down menu.

   - **Queued To Resend to Supplier Via Fax** - Allows you to resend the order using the original fax number or a new fax number.

   - **Queued To Resend to Supplier Via E-mail** - Allows you to resend the order to an

e-mail address provided by the supplier.

- **Remove Notification** - Allows you to remove failed purchase orders from the queue that no longer need to be resent.

4. Click **Go**.

5. If you are resending the order, a pop-up displays. Update the information, then click **Save**. The order will be re-sent and tracked via PO History – including the reason.

Email Order Status

The **Purchase Order Distribution Errors** queue in the **Find and Fix Errors** menu that allows customers to view PO email distribution errors and re-send them.

1. Navigate to **Administer** **> Find and Fix Errors > Purchase Order Distribution Errors**.

2. In the **Filters** panel, select **Bounced Back E-mail Failure** to view a list of PO distribution emails that were unsuccessful, then click **Search**.

- The system checks once every hour for failed emails.

- The Reason column will indicate that the **Email is returned undelivered.**

3. To re-send a failed email:

a. Select the checkbox next to each PO you want to re-send to the supplier via email.

b. In the **action** menu, select **Queue to Resend to Supplier via Email**, then click **Go**

c. Complete fields in the overlay and click **Save**.

Best Practices

Best practice is for administrators to re-send failed emails within 24 hours of the error appearing on the Find and Fix Errors page, and to use the comments available on the Resend overlay to provide additional information in the PO History. Emails re-sent after 24 hours will have additional limitations as noted below.

- For errors processed **within 24 hours** the following will take place:

  - The log will clear from the Find and Fix Errors page on a re-send.

  - An entry in the PO History records that the order was re-sent.

  - If the email distribution method or email address that is selected on a re-sent order differs from the one selected on the original order, those changes will NOT be noted in the PO History. Use the comments when re-sending to record this information.

- If the re-send fails, the Find and Fix Errors page will have a new entry that displays the email used for the re-send. The email distribution method will default to the method selected on the original distribution.

- Errors that have been listed for **more than 24 hours** on the Find and Fix Errors page are processed as follows:

  - PO's that are re-sent after 24 hours will process as usual from the Find and Fix Errors page (i.e., the log is cleared from the Find and Fix Errors page and an entry is recorded in the PO History).

  - However, if the re-send also fails, there will *not* be another entry on the Find and Fix Errors page. This failure will require intervention by support. Contact JAGGAER if this occurs.

Notification Preferences

Users with the following notification preferences enabled will automatically receive an email notifying them if a PO sent via email was not delivered. Users need the **Manage Order Failure Notifications** permission (Permission Settings > Orders > My Orders/Organization Orders) to see these notification preferences:

- **Notification Preferences > Administration & Integration**

  - **Prepared By - PO Distribution Failure Notice**

  - **PO Distribution Failure Notice**

  - **PO Distribution Failure Notice By Business Unit**

Return Workflow

Return a Document to a Previous Workflow Step

By default, when approving a document, the workflow approval process moves forward through approval steps configured by each organization.

With the 23.2 release, new functionality provides the ability for users with the appropriate permission to return a document to a previous workflow step that a user selects. This option is currently available. This option is available for the **Requisition**, **Purchase Order**, **Invoice**, **Receipt**, **Form Request**, **Budget Manager**, **Sourcing**, **Contract**, and **Payment** workflow types.

> **Important!** In some cases, repeating automated or integration-based workflow steps can have unintended consequences. To mitigate any potential issues with this feature and your existing workflow, a services engagement will be required to perform a detailed review of the target workflow and identify any adjustments needed to ensure the best possible implementation and execution of the functionality. Please contact your JAGGAER representative to preview this feature in your test environment or for more information concerning implementation.

Related Permissions

These permissions are displayed when the Revert Workflow setting for the associated workflow type is enabled:

- **Revert Requisition Workflow** (Permission Settings > Approvals > Requisition Approvals) - Users with the permission can revert a workflow approval step in the Requisition Workflow.

- **Revert Purchase Order Workflow** (Permission Settings > Approvals > Purchase Order Approvals) - Users with the permission can revert a workflow approval step in the Purchase Order Workflow.

- **Revert Invoice Workflow** (Permission Settings > Approvals > Invoice Approvals) - Users with the permission can revert a workflow approval step in the Invoice Workflow.

- **Revert Receipt Workflow** (Permission Settings > Approvals > Receipt Approvals) - Users with the permission can revert a workflow approval step in the Receipt Workflow.

- **Revert Form Request Workflow** (Permission Settings > Approvals > Form Request Approvals) - Users with the permission can revert a workflow approval step in the Form Request Workflow.

  > **CAUTION!** This permission will allow a user to revert ANY form request workflow regardless of the type (i.e., Supplier Requests, Contract Requests, Generic Requests, Check Requests, etc.).

- **Revert Sourcing Event Workflow** (Permission Settings > Approvals > Sourcing Event Approvals) - Users with the permission can revert a workflow approval step in the Sourcing Event Workflow.

- **Revert Sourcing Event - Evaluation Workflow** (Permission Settings > Approvals > Sourcing Event - Evaluation Approvals) - Users with the permission can revert a workflow approval step in the Sourcing Event - Evaluation Workflow.

- **Revert Contract Workflow** (Permission Settings > Approvals > Contract Approvals) - Users with the permission can revert a workflow approval step in the Contract Workflow.

- **Revert Budget Manager Workflow** (Permission Settings > Approvals > Budget Manager Approvals) - Users with the permission can revert a workflow approval step in the Budget Manager Workflow.

- **Revert Payment Workflow** (Permission Settings > Approvals > Payment Approvals) - Users with the permission can revert a workflow approval step in the Payment Workflow.

See "eProcurement Permissions and Notifications" on page 32 for information on eProcurement permissions.

How to Revert a Workflow Step

The **Revert workflow to a previous step** action allows users to return a document to a previous workflow step.

Revert Workflow options are not available for documents in Draft or Completed status, or if an automated step process is pending.

Revert a Workflow Step

If an organization has enabled the Revert Workflow feature for a document workflow type, users with permission to revert workflow approval steps can do so as follows.

1. Open the document.

2. Select the Revert Workflow action:

   - *New experience view* - In the right sidebar, under **What's next?**, click the actions icon
     * * * next to **Workflow** and select **Revert workflow to a previous step**.

- *Legacy view (for any document showing the legacy view, such as Forms or Sourcing) -* Click the **Revert workflow to a previous step** link.

3. In the pop-up window, click the **Select** button next to the workflow step that you want to revert TO.

4. Enter a reason for reverting the step (required) and click **Revert**.

5. The document returns to the selected workflow step, which now becomes the active step in workflow. Once the **Revert** button is clicked:

- The Revert Workflow action is recorded in the History along with the reason.

- The workflow is re-calculated and any previously approved steps, including the newly active step, are reset. All previous approvals are cleared and the steps will require approval again (although all previous approvers of a workflow step are still recorded in the History).

- Emails and notifications will be re-sent where applicable.

- A notification near the top of a document indicates that it has been reverted to a previous workflow step.

- The **Revert** workflow action affects different types of workflow steps as follows:

  - **Parallel workflow steps** - Users can revert back to any parallel step. This will cause ONLY the selected step to become active, while all other parallel steps will remain in their current state (approved, bypassed, skipped). **Users need to repeat the Revert Workflow action for EACH parallel step that they want to make active.**

  - **Ad-hoc workflow steps** - Users can revert back to an ad hoc step. The step will become active and the approver that was previously selected for the ad-hoc step will need to approve it again. This is also true if workflow is reverted to a step *before* an ad-hoc step - the ad-hoc step will be reset and the approver who was previously selected will need to approve the step.

  - **Skipped steps** - Since workflow is re-calculated, skipped steps are reset. Previously skipped steps are displayed or hidden as if entering the initial workflow.

Enable the Revert Workflow Feature

The **Revert workflow to a previous step** action allows users to return a document to a previous workflow step that a user selects. Enable the feature as follows.

1. **Contact JAGGAER to enable this feature** for your workflow type(s).

   > **Important!** In some cases, repeating automated or integration-based workflow steps can have unintended consequences. To mitigate any potential issues with this feature and your existing workflow, a services engagement will be required to perform a detailed review of the target workflow and identify any adjustments needed to ensure the best possible implementation and execution of the functionality. Please contact your JAGGAER representative to preview this feature in your test environment or for more information concerning implementation.

   - This feature is available for the **Requisition**, **Purchase Order**, **Invoice**, **Receipt**, **Form Request**, **Budget Manager**, **Sourcing**, **Contract**, and **Payment** workflow types with the 23.2 release, with plans to expand the feature to additional workflow types in future releases.

   - Since reverting workflow to previous steps can have an adverse impact on integrations, there may be a point in the workflow that the revert action should no longer be an option. To mitigate these risks, JAGGAER has the ability to add flags to workflow steps. These flags will prevent steps from being reverted to or reverted from.

   - This feature is not available for the mobile app.

2. **Update user permissions** - Once the Revert Workflow setting is enabled for a workflow type, the corresponding Revert Workflow permission is displayed, and it allows users to return to a previous workflow step. Administrators can assign the Revert Workflow permissions to user roles or user profiles.

> **Note:** Similar to the Expedite functionality, care should be taken when granting this capability to users as it may require in-depth knowledge of the workflow process depending on how it is implemented.

   a. Open the user role or user profile:

- *User roles* - Navigate to **Setup** 🔧 **> Organization Structure and Settings > Manage User Roles** and select the **user role** to update.

- *User profiles* - Navigate to **Administer** 🔧 **> Manage Users > Search for Users** and select the **user profile** to update.

   b. In the left menu, select **Permissions** (for user roles) or **Permission Settings** (for user profiles), then **Approvals**.

   c. In the right panel, enable the **Revert Workflow** permission under the sub-heading for the workflow type. For example, under **Requisition Approvals**, enable **Revert Requisition Workflow**.

Contract Compliance Tracker

Create and Manage Contract Compliance Tracker Contracts

Contract Compliance Tracker Configuration Concepts

Overview

Here are concepts used in working with Contract Compliance Tracker

Contracts Home Page

The **Contracts Home** page provides quick access to key tasks and activities related to the administration of contracts. It can contain action items, a list of contracts up for renewal, and more. It is displayed to users with the appropriate permission when they navigate to the Contracts Home page.

A standard contract dashboard is provided by JAGGAER and displayed on the Contracts Home page by default. Organizations can replace it by copying and editing the default dashboard to create their own custom versions.

Contract Account Codes

Organizations can add default contract account codes to contracts, which are automatically applied to invoice line items associated with the contract based on a set of system rules. These rules determine which account codes are displayed in various situations such as when PO or non-PO lines are added to an invoice, if the invoice owner changes, if an organization has commodity code mapping, etc. This saves invoice managers the time required to search for and apply the correct account codes to individual line items on invoices.

Contract Types

Contract types are ways in which organizations group contracts. Examples of contract types include commodities, or types of products and services. When setting up contract types, organizations have the ability to associate default forms that should be used for that type of contract. For example, if your organization has a type called "Consulting Services Agreements", you could attach a form containing the details needed when ordering consulting services.

In addition, organizations have the ability to set up workflow steps for requisitions that apply against contract types. You would need to work with JAGGAER Support or your Services team to enable workflow steps.

For organizations using the repository and authoring features, contract custom fields added to a contract type appear on each contract created from the contract type. When you are adding contract custom fields to a contract type, you can group them into sections, set the order they appear in within the group, and also set conditional visibility for the fields so that they appear in a sequence.

Contract Director Integration

If your organization has the **Contract Director** product, you may author contracts in Contract Director and export them to the contract repository for shopping. Contracts are exported upon contract approval or when an amendment to a previously exported contract is approved. When viewed, contracts that originated in Contract Director display a message that some fields are only editable in Contract Director. Information that is managed in Contract Director includes:

- Contract Number
- Contract Name/Title
- Supplier
- Contract State (Active/Inactive)
- Description
- Start and End dates
- Budget
- Consortium "published to" settings…

Contract Flex Fields

Contract Flex fields can be used by organizations to track any additional information needed for contracts. Flex fields can be either text entry or selection from a predefined list of options. Examples of what other organizations have used for flex fields include: originating department, insurance certificate required, revenue contract, and state contract.

Contract Status

Contract status indicates where a contract is in its lifecycle. These statuses can provide management with the current state of contracts which are about to expire or be renewed.

eProcurement

The eProcurement section on a contract contains all information and configurations related to shopping from a contract, such as budgeting, spend, applicability, related goods and services, and PO clauses. This is also where users make a contract active for shopping or publish it to one or more consortium members if your organization uses the Consortium feature.

One Contract per Purchase Order

The system can be configured to allow only items from one contract per PO when a requisition contains items from multiple contracts. You have the option of splitting the requisition into multiple PO's or preventing the requisition from being submitted.

Search for Contract Compliance Tracker Contracts

Overview

If your organization manages a large number of contracts in JAGGAER, there are a few options to help you to locate the contracts you need:

- The Contracts Home page provides quick access to key tasks and activities related to the administration of contracts for users with the Contract Administrator permission. See **View the Contracts Home Page**.

- Search Contracts helps you to locate the contracts based on specific criteria. You can perform a simple search or you can perform an advanced search based on a more complex set of values. See **Search Contracts**.

- Saved Searches allow you to save search settings and organize saved searches in folders, share them, or export search results. Saved searches are useful if you use the same search criteria frequently and want to save contract search settings to use again, or export a limited set of records. See **Saved Searches**.

- The Contract Summary page provides a single location from which a user can view important contract information for one contract. Links to Contract Summary pages are often provided in search results and reports. See **View Contract Summary**.

Related Permissions

See Contract Compliance Tracker Permissions for information on Contract Compliance Tracker permissions.

View the Contracts Home Page

The **Contracts Home** page displays a dashboard that shows contract information and provides quick access to key tasks and activities related to the administration of contracts from one location. It can contain action items, a list of contracts up for renewal, and more.

The **Contract Administrator** permission is needed to access the Contracts Home page.

1. Navigate to **Contracts** ![icon] **> Contracts > Contracts Home**.

2. The following information is displayed on the Contracts Home page dashboard by default. What you see may be different if your organization has customized the dashboard:

   - **Contracts Summary** - This is a bar graph that provides contract filter fields along the top so you can quickly view the number of contracts that meet the specified criteria. Drilling into the graph results will open the Contract Search Results screen, which lists all the contracts that match filter settings.

     For example, you can select an option in the **View Contracts By** to see contracts grouped by contract manager, contract type, or contract status, then click on a bar in the graph to view a list of those contracts.

   - **Contract Search** - Use this field to find a contract by keyword. It displays the simple search option, where the system looks for contracts with information that is the same as or similar to the search term entered in the field, but there are also options to perform an advanced search.

   - **Quick Links** - Click on the appropriate link to quickly access common contract administration functions such as creating a new contract, or viewing saved searches.

   - **Contracts Alerts** - This section provides an overview of contracts that have pending alerts. These are contracts coming due for renewal, about to expire, or recently expired. Click on the Contract Number link to open that contract. Click on the information icon ⓘ to open the contract summary page.

Search Contracts

If your organization manages a large number of contracts, the **Search Contracts** page is key to locating the contracts you need. There are two ways to search, and which type to use depends on what you're looking for:

- Use **Simple Search** when you may not have all the information you need and want to search based on partial information. The system will search contract fields for each keyword entered, providing you with a broad results set. See Contract Simple Search.

- Use **Advanced Search** when you have exact data or a complex set of values that you want to search for, e.g., you have a contract number, or want to apply multiple search filters to limit the number of search results. The system only returns results that are an exact match to the values entered. See Contract Advanced Search.

All users can search for contracts, but results and access will vary depending on your user permissions and system licenses.

If you often search for the same things, you can save your search settings in a saved search to use again. See Saved Searches for more information.

Understanding the Search Results

In order to quickly find the contract or contracts you need, it helps to understand the search results. The image below shows an example of the contract search results. Click a number BELOW the image for information about the corresponding number on the image.

Note: Contracts that don't expire will display "No Expiration" in the End Date column on the Contract Search Results page. This is to distinguish them from contracts that are in Draft status and will not have an end date set until they are approved and active. Draft mode contracts that do not have start and end dates are indicated by a dash "-" in the Start Date and End Date fields on the Contract Results page.
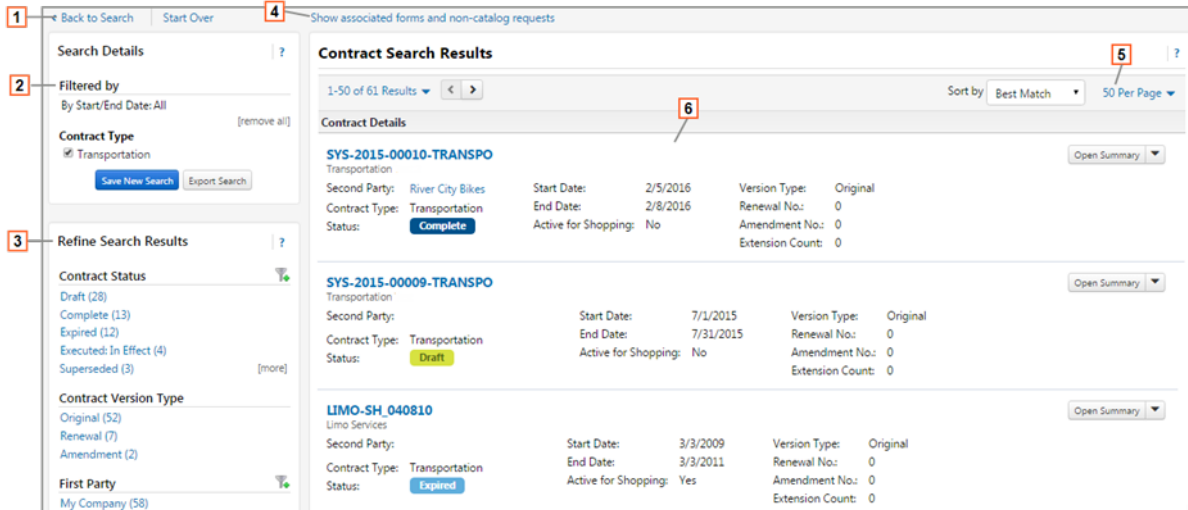
1. Back to Search/Start Over

Selecting Back to Search will return you to the search page with all of our previous search criteria intact. Selecting Start Over takes you to a brand new search with no criteria entered.

2. Filtered by

This section displays the filters/values by which your search results are filtered. Initially, any search criteria you entered will be displayed. As you add filters, the Filtered by section will update to reflect the new filters. From this section, you can also remove a single filter by de-selecting the associated checkbox are click the remove all link to remove all the filters. The Export Search button allows you to export the search results.

3. Refine Search Results

Search results can be refined by using the post-search filters. Below each filter, the available values display. The number of contracts associated with that value displays beside the value. Click on a value to filter the search results. **Note:** The filters and values displayed will vary based on your organization's set up and your individual permissions.

4. Show associated forms and non-catalog requests

Click this link to expand the search results to reveal any associated organizational forms and non-catalog requests.

5. Results Page Management Function

Several sort options are available in the Sort by drop-down menu. You can also control the number of search results displayed for each results page.

6. Contract Search Results

The search results display in a list and include the following information:

- **Contract No.** - The contract number. Click on the number to view the contract summary, open the contract for editing, view the associated items or shop from the contract. What you can do will depend on your permissions.

- **Contract Name** - The contract name.

- **Second Party** or **Supplier Name** - The second party or supplier on the contract, i.e., who the contract is with. **Note:** Click on the **name** to view information about the supplier or contract party, their contacts, and contact information.

- **Contract Type** - The contract type.

- **Status** - Indicates where the contract is in the contract workflow.

- **Start Date/End Date** - The start and end date of the contract.

- **Active for Shopping** - Yes or No indicates whether or not the contract is active for shopping.

- **Version Type** - Indicates whether the contract is the original contract, a renewal, or an amendment.

- **Renewal No.** - The number of times a contract has been renewed. A contract that has not yet been renewed is listed as 0.

- **Amendment No.** - The number of times a contract has been amended. A contract that has not yet been amended is listed as 0.

- **Extension Count** - The number of times the contract end date has been extended. A contract that has not yet been extended is listed as 0.

Contract Simple Search

Use **Simple Search** when you may not have all the information you need and want to search based on partial information. The system will search all contract fields for each keyword entered, providing you with a broad results set.

All users can search for contracts, but results and access will vary depending on your user permissions and system licenses.

Note: Search filters use the type-ahead feature. Begin entering text in a field to search for and/or select available values.

1. Go to **Contracts** **> Contracts > Search Contracts**.

2. Click the **Simple Search** link in the top-right corner of the page if you are not on the Simple Search page.

> **Note:** This link toggles between the Advanced and Simple Search pages. If you are on the Advanced Search page, you will only see a Simple Search link. If you are on the Simple Search page, you will only see an Advanced Search link.

3. Enter search criteria by completing the following fields:

   - **Contract** - Enter data such as contract name, description, etc. in the field. The system will search all contract fields for each keyword entered, providing you with a broad results set.

   - **Active for Shopping** - Filter by the contract's shopping status. The choices are All, Active or Inactive. **Note:** Selecting **All** will return the largest number of search results, including contracts in Draft status.

   - **By Start/End Date** - Search based on when the contract is active. The options are: All, Effective, Expired, Future, No Expiration, Custom. The system will compare the start and dates entered on the contract to the current date and return the appropriate results for all options except Custom. Selecting **Custom** will open up additional **Start Date between** and **End Date between** fields, where you can enter the contract start and end dates to search for.

   - **Created Date between** - Search for contracts based on their creation date. Enter a date range in the calendar fields provided.

4. Click the **Search** button to view your results.

5. (optional) Choose an option in the **Sort by** field to sort records by contract name, number, start date, etc.

6. (optional) Apply additional search filters by selecting filter options in the left menu under **Refine Search Results**.

> **TIP:** In the search results, make sure the **Active for Shopping** checkbox in the left menu is blank to display a larger set of results. If the checkbox is selected you will only see contracts that have been activated for shopping.

Contract Advanced Search

Advanced Search allows you to enter complex search criteria for a narrow results set. Use advanced search when you have exact data or a complex set of values that you want to search for, e.g., you have a contract number, or want to apply multiple search filters to limit the number of search results. The system only returns results that contain an **exact match** to the values entered.

All users can search for contracts, but results and access will vary depending on your user permissions and system licenses.

Enter information in one or more fields to search for contracts based on that criteria. Leaving a field blank will return all results for the field, for example, all contract types. Some search filters use the type-ahead feature. For these fields, begin entering text in a field to see a list of values that match the text, or click the search icon 🔍 to see a list of all the values that you can select.

1. Go to **Contracts 🔧 > Contracts > Search Contracts**.

2. Click the **Advanced Search** link in the top-right corner of the page if you are not on the Advanced Search page.

   > **Note:** This link toggles between the Advanced and Simple Search pages. If you are on the Advanced Search page, you will only see a Simple Search link. If you are on the Simple Search page, you will only see an Advanced Search link.

3. Enter search criteria in the search filter fields. The information must be exact; for example, you need the complete contract number. If you have only partial data, use a simple search.

   General search filters are displayed at the top of the page, and sub-sections are displayed below. The sub-sections can be expanded to add more search criteria. The fields and sections you see depend on your user permissions and organization settings.

   Here are the filters and sub-sections that can be found on the contract Advanced Search page:

   ### General

   - **Contract Number** - Enter an exact contract number.

   - **Contract Name** - Enter a contract name.

   - **Keywords** - Enter keywords for the contract. The system will look for terms that have been entered in the **Searchable Keywords** field on the contract header in the Additional Details section.

   - **Contract Type** - Select one or more contract types.

- **Contract Version Type** - Search by contract version, i.e., original contracts, renewals or amendments.

- **Contract Manager** - Search for contracts by contract manager. Choose one of the Any, Me, or Pick... radio buttons to determine which contracts are displayed in the search results.

  - **Any** - This is the default setting. Select this option if you do not want to filter for contract managers on the contract.

  - **Me** - Select to display only those contracts that have you, **the person currently logged into the system**, listed as a contract manager. This means contract managers will only see their own contracts in the search results.

    > **Note:** When a saved search with the **Me** setting selected is added as a **Saved Search: Contracts** widget on a contract dashboard, the results displayed in the widget will change based on who is logged into the system, so that a contract manager will only see their own contracts. For example, Contract Manager A will only see contracts that have Contract Manager A listed as a contract manager. Contract Manager B will only see contracts that have Contract Manager B listed as contract manager.

  - **Pick...** - Select to display only those contracts that have the individuals selected in the Contract Manager search filter listed as contract manager. If this option is selected, search for and select users by using the type ahead feature or clicking the search icon.

- **Summary** - Search for contracts based on words from the Summary field on the contract header.

- **By Start/End Date** - Search based on when the contract is active. The options are: All, Effective, Expired, Future, No Expiration, Custom. For all options except Custom, the system will compare the start and end dates entered on the contract to the current date and return the appropriate results. Selecting **Custom** will display additional **Start Date between** and **End Date between** fields, where you can enter contract start and end dates to search for.

- **Created Date** - Search for contracts based on their creation date. Select a date range from the options provided.

- **Supplier** - Enter one or more suppliers.

- **Supplier Class** - Search by the supplier's classification as entered on the supplier profile; for example, all contracts where the supplier is classified as a preferred supplier.

Sub-Sections

- **Contract Value**

    - **Value** - Used to search contracts by the amount entered in their **Value** field. Select **Is Greater Than**, **Is Less Than**, or **Is Between**, and enter the value(s) to search by.

    - **Contract Total Value** - Used to search contracts by total contract value. Select **Is Greater Than**, **Is Less Than**, or **Is Between**, and enter the value(s) to search by.

- **Renewal** - Search for contracts based on their renewal settings. These filters can be used in combination to identify auto-renewable contracts that have no more renewals remaining, and also to separate contracts that have truly expired from contract renewals that have expired, but where a new, active renewal has been created:

    - **Auto-Renew** - Select **Yes** to search for contracts that are set to allow the system to automatically renew a contract when the expiration date is reached. Select **No** to search for contracts that don't have the auto-renew setting enabled.

    - **Will Not Renew** - Select **Yes** to search for contracts that are not set up to auto-renew and will expire or have expired within the date range specified in the By Start/End Date filter, or are set up to automatically renew but there are no more renewals remaining. Select **No** to identify contracts that are set up to automatically renew and do have renewals remaining.

- **eProcurement** - Search for contracts based on eProcurement settings:

    - **Active for Shopping** - Search for contracts based on their shopping status. Choices are Active (can be used for shopping), Inactive (cannot be used for shopping), or All (both Active or Inactive).

    - **Automatically Apply Purchases to this Contract** - Select **Yes** to search for contracts that are configured to apply automatically in the shopping cart. Select **No** to search contracts that are configured NOT to apply automatically in the shopping cart.

    - **Budget Status** - Search for contracts that match a specific budget status based on the recorded PR spend. Select **Approaching PR Budget** to return contracts where the PR Spend amount is between 90% and 100% of the contract budget. Select **Exceeding PR Budget** to return contract where the PR spend is greater than the contract budget.

- **Has Price Set** - Search for contracts that have a price set explicitly associated with them. Leave this field blank to search against contracts with and without associated prices sets. This filter can be used in combination with the **Requires price set** filter to find contracts that should have a price set associated with them but do not.

- **Requires Price Set** - Search for contracts that have been set to require a price set. This filter can be used in combination with the **Has price set** filter to find contracts that should have a price set associated with them but do not.

- **Uses Notification Tiers** - Search for contracts that have spend notification tiers set up in the contract Notifications area. This filter only looks to see if tiers have been set up and not whether the contract actually sends out notification email alerts.

- **Approaching PR Tier Notification** - Search for contracts where the PR Spend amount is between 90% and 100% of any tier set up for the contract.

- **Evaluated Receipt Settlement** - Select to search for contracts that have been flagged to allow evaluated receipt settlements.

- **Contract Account Codes** (specific to your organization) - Search for contracts based on contract account codes. These search filters are identical to the fields displayed in the Code Defaults on Invoice section on the eProcurement Setup page and are unique for each organization.

- **Applies To** - Search for contracts based on the organization business unit or department to which the contract applies.

- **Consortium** - If your organization has consortium-related contracts, you can search for contracts based on the consortium member it has been published to. You can also limit the search based on contract origin. Click the **Include Unavailable Consortium Contracts** checkbox to include contracts that are no longer available for use on your site.

- **Status Flags** - Click the **With Errors** checkbox to filter for contracts with status flags that identify records with errors.

4. Click the **Search** button to view your results.

5. (optional) Choose an option in the **Sort by** field to sort records by contract name, number, start date etc.

6. (optional) Apply additional search filters by selecting filter options in the left menu under **Refine Search Results**.

Saved Searches

If there is a set of search filters that you use regularly, create a **saved search** to keep the settings. Saved searches solve the problem of having to enter search criteria over and over again. For easy access you can add links to them on the Contract Search page, the Contract Home page, on dashboards, and in saved search folders. Saved searches can also be downloaded for reporting or exporting and importing contract data.

Saved searches are created and updated from the **Search Contracts** page, but they are viewed and managed in the **View Saved Searches** page.

Create and Update Saved Searches

Saved searches are created and updated from the **Search Contracts** page.

Create a Saved Search

1. Navigate to **Contracts** ⚙ **> Contracts > Search Contracts**.

2. For either a simple or advanced search, enter your search criteria and click the **magnifying glass icon** or **Search** button so that the search results page opens. See Search for Contract Compliance Tracker Contracts for details.

3. In the left menu, click **Save New Search**. The Add to Saved Searches window opens.

4. Enter a **nickname** for the search. This is the name that will identify the search.

5. (optional) Expand the **Add Description** link and type a description of the search. The description can be up to 500 characters long.

6. Select the **Personal** or **Shared** folder that you want to save the search in.

   > **Note:** You can create a folder by clicking **Add New**, entering a **name** for the folder, and defining access to it.

7. Click **Save**. The search is saved to the folder.

8. Access the search by navigating to **Contracts** ⚙ **> Contracts > View Saved Searches**.

Update a Saved Search

1. Access and run the saved search.

2. Change the parameters of the search in the **Refine Search Results** section on the Contract Search Results page.

3. In the **Filtered by** section on the left, click **Save Changes**.

4. Click **Yes** in the confirmation window.

Modified searches will display "Modified" next to the saved search name in View Saved Search.

View Saved Searches

Saved searches are managed in the **View Saved Searches** page. This is where you can edit saved searches, control shortcuts and manage saved search folders. This is also where you can export saved search results as an Excel or CSV file that can be used for reporting, or exporting and importing contract data.

Run a saved search from the View Saved Search page

1. Navigate to **Contracts** **> Contracts > View Saved Searches**.

2. In the left menu click the **folder** that contains the search.

3. Highlight the **saved search** you want to generate and click on the **search name** or click **Go**.

The results are displayed in the Contract Search Results page.

Add or remove a saved search shortcut from the Search Contracts page

A saved search must exist before you can create a shortcut to it. Shortcuts appear under **Saved Searches Shortcuts** on the Search Contracts page, however they are managed from the View Saved Search page.

When creating a shortcut, if a saved search is in your personal folder, you are the only person who will see it on the Search Contracts page. If the saved search is in a shared folder, only the users who have access as defined on the folder will see it.

1. Navigate to **Contracts** **> Contracts > View Saved Searches**.

2. In the left menu click the **folder** that contains the search.

3. On the right, highlight the saved search and click **Add Shortcut** or **Remove Shortcut**.

4. Navigate to **Contracts > Search Contracts**. Your shortcut is added to or removed from the **Saved Searches Shortcuts** list on the left side of the Search Contracts page.

Export saved search results as an XLS or CSV report from View Saved Search

Saved searches can be downloaded for reporting purposes, or to use when exporting and import contract data. The exported file can be in an XLS or CSV format. All standard contract fields are included in the downloaded report. For organizations with Contracts+, there is an additional option to include contract custom fields in the downloaded file.

Users with contract administrator and contract manager permissions can view all contract exports, including those performed by other users, in the Import and Export screen.

> **Note:** You can also export searches directly from the Search Contracts screen. See Export Search Results as a Report.

1. Navigate to **Contracts ⚙ > Contracts > View Saved Searches**.

2. In the left menu click the **folder** that contains the search you want to export.

3. On the right, highlight the saved search and click **Export**. The Export Search window opens.

4. Enter a **description** of the search. The description can be up to 200 characters.

5. Select a **format** for the report in the Action field. The options are Export Excel (.xls) and Export CSV (.csv).

6. Click **Submit.** The Export Submitted window opens.

7. Click **Go to Page: Download Export Files**. The Contract Import/Export Results window opens.

8. Click on the **file name** to open and save the file to your local drive.

Saved Search Folders

Every saved search must be saved in a folder. A saved search can be stored in a **Personal** folder, which means the saved search is only available to the user who created it. If you have the appropriate permission, you can also store saved searches in a **Shared** folder, where they can be accessed by other users in the organization. You can limit who can see searches in a shared folder through access settings on the folder.

Users have the option to create new folders when they are saving a search, but once created they are managed from the View Saved Searches page, where folders can be created, edited, moved, copied or deleted. You can also set up a folder hierarchy by creating subfolders. Subfolders acquire the settings of their parent folder.

When creating shortcuts, saved searches in your personal folder will only be visible to you on the Search Contracts page. If the saved search is in a shared folder, only the users who have access as defined on the folder will see it on the Search Contracts page.

Create a folder

1. Navigate to **Contracts** ⚙ **> Contracts > View Saved Searches**.

2. In the left menu, click **Add New**, then choose the type of folder as follows:

   - Select **Top level personal folder** if searches in the folder should only be available to you.

   - Select **Top level shared folder** if you want other users to be able to use the saved search.

   - Select **Subfolder of selected folder** if you want the new folder to be below the highlighted folder in the hierarchy (make sure you have the right folder highlighted).

3. Enter a **name** for the folder in the Name field.

4. (optional) Type a **description** of the folder under 254 characters in the Description field.

5. If you selected **Top level shared folder** in step 3, define who can access searches in the folder as follows:

   - (optional) Select the checkbox next to **Allow Entire Organization (Read Only)** if anyone in your organization can view the search. They will be able to run the search, but they will only be able to view summary information in the search results. Leave the checkbox blank if the only access to the search is provided by the access settings below.

   - Click **Add Access** and select whether you want add access by **Business Unit**, **Department**, **Role** or **User**.

   - Once you make your selection in the Add Access field, a second field is displayed where you need to **search for and select who will have access to the folder**. The field will vary depending on what is selected in step 7 above. For example, if you choose business units, the system displays the Select Business Unit field. If you select user, a user search opens. You can add multiple records for each access type – each time you select a record, it appears on a line below.

- For everyone who access to the record, select the **type of access** they have. The person creating the folder automatically has Admin access by default:

    - **Read-Only** - Users can view and copy searches, or add them as shortcuts to the Search Contracts page. They cannot move, edit or delete searches.

    - **Editor** - Users can edit, move, copy and delete searches, but they cannot change folder settings.

    - **Admin** - Users can edit, move, copy or delete both searches and folders.

    Note: Click **remove** next to a record to delete it.

6. Click **Save Changes**.

Edit or delete a folder

You need administrator permissions to the folder to perform this task. If you delete a folder, all favorites and subfolders will also be deleted.

1. Navigate to **Contracts** ⊞ **> Contracts > View Saved Searches**.

2. In the left menu click the **folder** you want to change.

3. Click **Folder Actions** in the top right corner of the screen and choose one of the following action items:

    - Select **Edit** to change settings and update as needed.

    - Click **Delete** to remove the folder. If you delete a folder all favorites and subfolders will also be deleted.

4. Click **Save Changes**.

Edit, move, copy or delete saved searches in a folder

You need edit permissions to the folder to perform this task.

1. Navigate to **Contracts** ⊞ **> Contracts > View Saved Searches**.

2. In the left menu click the **folder** that contains the searches you want to change.

3. Choose one of the following action items for the search you want to change:

    - Click **Edit** to change the name or description of the saved search, then make changes as needed.

    - Click **Move** to move the search to another folder, then select the **folder** you want to move it into.

- Click **Copy** to make a copy of the saved search, then select the **folder** you want to copy the search into.

- Click **Delete** to delete the search.

> **Note:** If you want to perform the same action on multiple saved searches at once, click the checkbox on the right for each search you want to change, then select the action from the **Actions for Selected Favorites** field at the top of the column.

4. Click **Save Changes**.

Export Search Results as a Report

Simple or advanced search results can be saved as a report, in a CSV or XLS (Excel) format.

1. Navigate to **Contracts** **> Contracts > Search Contracts**.

2. Select and generate the **saved search** that you want to report on.

3. Click the **Export Search** button in the left menu. The Export Search window opens.

4. Enter a **description** of the search. The description can be up to 200 characters.

5. Select a **format** for the report in the Action field. The options are Export Excel (.xls) and Export CSV (.csv).

6. Click **Submit.** The Export Submitted window opens.

7. Click **Go to Page: Download Export Files**. The Contract Import/Export Results window opens.

8. Click on the **file name** to open and save the file to your local drive.

View Contract Summary

The **Contract Summary** screen provides a single location from which a user can view and access important contract information. The Summary screen "rolls up" information that is normally accessible from other areas in the contract. The fields that are viewable from the summary screen will depend on your organization's configuration and your own visibility into the contract.

To access the summary screen, perform one of the following actions:

- **Perform a contract search**. In the search results, click on the **contract number** in the Contract No. field.

- Open a contract from the contracts dashboard or search results and then click **Summary** in the left menu.

The screen displays with available sections and fields. Click on a section to view the available fields. If you have accessed the summary screen by clicking on the contract number in the search results, you can click the **Go To Contract** button to access the contract.

Contract Compliance Tracker Permissions

Overview

Here is an overview of the contract permissions and notificationsfor **Contract Compliance Tracker** that you may need for setting up your system.

Contract Permissions

Here is an overview of the contract permissions for **Contract Compliance Tracker** that you may need for setting up your system. They are found under **Permissions Settings > Contracts**.

> **Note:** We recommend managing permissions through user roles rather than assigning permissions for each user. Local changes will override user role permissions.

Contract Permissions

- **Contract Configuration** - Allows users to manage general contract settings, contract types, contract number wheels and jurisdictions. For organizations with Contracts+, users with the permission can also manage contract work groups – the user can assign work group administrators and control which users have access to work groups, add child work groups to a parent work groups, and delete work groups that have no contracts and no child work groups.

- **Contract Administrator** - Allows users to manage all contracts. They can view contracts irrespective of a non-owner's *Full*, *Limited* or *Partial* visibility. They may view all contract reports.

- **Consortium Contract Administrator** - For organizations that have been set up with a member relationship to a consortium that has the Contract Compliance Tracking solution. It gives the user the ability to view and subscribe to contracts that have been shared by their consortia. In addition, this permission gives the user the ability to administer the member-level settings for the shared contract, including: Accessibility, Contract Type, Fulfillment Centers and Non-Catalog capabilities.

- This permission is only visible to organizations that have been set up with a member relationship to a Consortium that uses Contract Compliance Tracking.

  - If the member organization also uses Contract Compliance Tracking, this permission does not give the user any permissions to administer or edit member-created contracts. This permission is completely independent of the Contract Administrator and Contract Owner permissions.

- **Contract Manager** - Users with Contract Manager permission are able to manage only their own contracts. They may view others' contracts where the other owners have granted non-owners Full or Partial visibility, and they may view reports based on the same limitations.

- **Export Search Results** - Provides the ability to export contract search information. Once the export request is made, the user will have access to the Search Exports screen (located on the History tab) to view their own exports.

- **Manage Company Exports** - Allows a user to manage exports across an organization. They can see all exports and delete any export if necessary.

- **Edit Evaluated Receipt Settlement** - If an organization has the Evaluated Receiving Settlement feature enabled, this permission allows a user to modify the **Evaluated Receipt Settlement** (ERS) field on the contract eProcurement page to indicate that the contract can be used for evaluated receiving settlement. ERS allows non-PO invoices to be generated from a contract for non-catalog goods or service items that have already been received.

Contract Notification Preferences

Contract Compliance Tracking (CCT)

Contract notification preferences determine which contract notifications a user may receive and the format they receive them in. They can choose to receive notifications by email, through system notifications, or both.

If a user receives contract notifications by email, clicking the **View Contract** link in an email notification will direct them to the Contract Summary page of a contract. They will be able to view the contract summary only or full contract details based on organization settings.

> **Note:** In addition to enabling contract notification preferences on a user profile, the user must also have access to the contract and the appropriate notifications must be enabled on the contract.

1. Navigate to the user profile and select **Permissions Settings > Notification Preferences > Contracts**.

2. For each item below leave the setting as **Default**, or click the **Edit Section** link in the top right corner, click the **Override** radio button, and choose your notification preference from the drop down menu. These notifications are used by Contract Compliance Tracking:

Contracts

- **Contract Budget /Tier Notification** - Sent when the overall contract total budget is exceeded or a tier notification is met. **Note:** The setting for when an email is triggered is configured on the **Budget and Spend** page of a contract. Emails can be triggered based on PR, PO, and/or invoice spend.

- **Contract Start Date - Advance Notice** - Sent when a contract start date is approaching (lead-time of event).

- **Contract Start Date Passed** - Sent when a contract start date occurs.

- **Contract End Date - Advance Notices** - Sent when a contract end date is approaching (lead-time of event).

- **Contract End Date Passed** - Sent when a contract end date occurs.

- **Contract Renewal Date - Advance Notices** - Sent when a contract renewal date is approaching (lead-time of event).

- **Contract Renewal Date Passed** - Sent when a contract renewal date occurs.

3. Click **Save Changes**.

Create Contract Compliance Tracker Contract

Overview

Use the information below to create a Contract Compliance Tracker contract.

Related Permissions

See Contract Compliance Tracker Permissions for information on Contract Compliance Tracking permissions.

Contract Identification

As contracts are created, it is important to consider how the contracts will be identified so that they can be easily located during contract searches. The four principle contract identifiers are detailed below.

- **Contract Number** - The contract number is the key identifier for a contract and is determined when the contract is first created. **Important:** The contract number cannot be modified once the contract is saved. The contract number is important because it is used by administrators to search for contracts and displays on the screen with associated items from the contract, and in reporting. It also can be provided on the purchase order to the supplier if required. It is HIGHLY recommended that organizations determine a naming/numbering schema prior to entering contracts. **Note**: The contract number may come from an external contract authoring system.

   Here are some best practices in assigning contract numbers:

   - If different groups within your organization will use contract purchasing, use a prefix to identify the different groupings of contracts. For example, if you have one group that handles Service Contracts and another for Goods, the first group could use Contract Numbers that start with S-001, S-002, while the second group could use G-001, G-002, etc.

   - Numbers, text, and punctuation are allowed in contract numbers.

   - A common practice is to use the contract number on the actual contract (i.e., paper) for the contract in the JAGGAER site.

   - Duplicate contract numbers can exist as long as the contracts have different suppliers OR if a supplier has not been identified.

- **Contract Name** - A short descriptor that identifies the contract. The purpose of this field is to help you quickly "find" the contract you are looking for. Since a different field exists for the supplier name, it is recommended to use a descriptor that includes information other than the supplier name. The contract name can be changed by the contract manager at any time. **Note:** If the contract originated in the Contract Director product, the name can only be edited in Contract Director.

- **Supplier Name** - The name of the supplier with whom you have negotiated the contract. The supplier name is selected from your list of active suppliers (hosted, punch-out, or non-catalog).

   > **Important Note:** Once you have associated a contract with a supplier name, you **cannot** change the supplier. In order to make a contract active, a supplier must be selected.

- **Contract Types** - Use contract types to differentiate between the types of contracts for searching, using, and reporting on contracts. For example, one buyer may be responsible for all Service (type) contracts and another buyer responsible for all Lease (type) contracts.

Note: **JAGGAER ONE Cross-Module Integrations** customers - if the contract originated from a JAGGAER Advantage (JA) contract, the basic identifying contract information is managed in JA platform. See " Contracts Managed in Sourcing+" for more information.

Contract Status

Contract statuses indicate the "stage" of the contract. For example, you may assign a contract that is complete but not yet activated a status "Waiting for Activation".

When a contract is created in the system, the **start date** and **end dates** are entered, and can be updated if needed. This date range is very important because it is used to indicate the status of the contract.

Below are examples of contract status values:

- **Effective Contract** - A contract is effective in the date range between the start date and end date. The effective "period" can range from one day, one year, or span multiple years. The effective dates are typically listed specifically in the "paper" contract. From a system perspective, requisitions and purchase orders can only be "paid from" or associated with effective contracts. The contract must also be Active in order to use it.

- **Expired Contract** - A contract is automatically marked as Expired once the end date passes. Requisitions cannot be associated with expired contracts.

- **Future**- A future effective contract indicates that the contract is not effective yet, but will be, eventually. For example, you might enter a contract in February that is not active until June. Assuming that the contract is active, the contract will be visible and available for use (i.e. – Effective) on the effective date.

Contract Activation

The effective dates of a contract indicate when the contract is valid. In order to actually "use" a contract in the system, the contract must also be **Active**. Occasionally, you will not activate a contract because the contract is not finalized or the supplier has not been added to the system – although the effective date is current. When the term of a contract expires it will automatically inactivate the contract.

> **Note:** The statuses in the Contract Status field are organization-defined and created during implementation, and the status of a contract is manually updated by changing the value in the Contract Status field. For systems using Contracts+, the statuses in the Contract Status field work separately from the color-coded standard contract statuses that appear with the contract record and that automatically change as the contract moves through the approval workflow.

Create Contract and Complete Header

Selecting **Create New Contract** opens a contract wizard which asks for basic information about the contract you are creating, such as its name and contract type. Once you click Create Contract, the contract record is created and opens to the main contract page, called the contract header.

The contract **Header** page contains basic information about the contract, such as the contract number, contract name, and contract type, and the dates and renewal information. Some of this information is entered when the contract is created, but you have the ability to edit most of the Header fields.

Expand each link below and complete steps as indicated. While creating a contract, click **Next** on the bottom of a page to save changes and move to the next section, or **Save Progress** to save your changes and return to the contract at a later date.

The **Contract Manager** or **Contract Administrator** permission is needed in order to create or update a contract.

Create the contract record

1. Navigate to **Contracts** **> Contracts > Create New Contract...**.

2. Complete these fields:

   - **Contract Name** - Enter a descriptive contract name. The name can be up to 100 characters long.

   - **Contract Type** - Select a **contract type** from the drop-down. This field is not required to create a contract, but it is suggested that you select a type for categorization purposes.

   - **Currency** *(displayed if the use of multiple currencies is enabled)* - Select the currency that will apply to the contract. **The currency cannot be changed once the contract is saved.**

If your organization is using eProcurement, this allows contract purchases to be entered and tracked in a specific currency. This does not prevent orders in other currencies. Purchases made in other currencies will be converted to the preferred currency using the prevalent exchange rate. If your organization uses multiple currencies, you will need the Ordering and Approval Settings > Currency Access permission to see all available currencies.

> **Note:** If your organization uses one currency, the Currency field is not available when creating a contract. The currency will default to your organization's base currency and is displayed as a read-only field on the contract header.

3. Click the **Create Contract** button. A contract is created and opens to the contract **Header** page, where you can complete additional information for the contract.

Complete contract header information

1. Open the appropriate contract for editing. The **Contract > Header** page will display by default.

2. Configure the following fields:

   - **Contract Number** - A contract number that has been automatically generated by the system is displayed by default. If your organization does not use a contract number wheel, enter the number that your organization and supplier will use as the reference number for the contract.

   - **Contract Name** - Displays the name entered in the Create Contract wizard. Change the name if needed. The name can be up to 100 characters long.

   - **Contract Type** - Displays the contract type selected in the Create Contract wizard. Change the contract type if needed.

   - **Currency**- Read only field. Displays the currency selected in the Create Contract wizard.

   - **Supplier Name** - In order to make a contract active, a supplier must be selected. The supplier can be changed while the contract is in Draft status:

     - Click the **Select Supplier** button. Search for the supplier by supplier name or click the **More Options** link for additional search options.

     - When you have located the correct supplier, click the associated radio button then click **Select Supplier**. The Contact Information window opens.

     - (optional) You can select a contact from the **Choose a Contact** drop-down or choose to create a new contact.

- **Contract Status** - Select the appropriate status from the drop-down menu. **Note**: Contract Status options in this field are set up internally and are specific to your organization.

- **Summary** - Enter information about the contract's general purpose that will be displayed in specific places like the **Contract Information** window. Several formatting options are available and you can include external web links. For information about formatting this field, click the ❓ in the top-right corner of the page. The Summary help topic will provide you with formatting details.

  > **Note:** Click **Edit Summary** to modify text in the Summary field.

3. Click **Save Changes** to save your work and remain on Contract Header page. Click **Next** to save your work and move to the next page (**Attachments**).

Configuring dates and renewal information

The contract Header page is where to enter the start and end date and renewal information for the contract.

1. Open the appropriate contract for editing. The **Contract** > **Contract Header** page will display by default.

2. Go to the **Dates and Renewal** section.

3. Configure the following fields:

   - **Time Zone** (required field to save a contract) - Select the time zone in which the contract's start and end dates will occur. The time zone will default to the organization's default time zone. In most cases, the default time zone is appropriate.

   - **Start Date** (required field to save a contract) - Specify the date/time on which the contract becomes effective. **Note:** A contract must also be set to **Active for Shopping** in order for users to shop against it.

   - **End Date** (required field to save a contract) - Select a contract type from the drop-down menu. **Note:** Contract type options are set up internally and are specific to your organization.

   - **Auto Renew** - Select the **Yes** radio button to allow the application to automatically renew the contract when it reaches the configured End Date. When a contract is configured to auto-renew, it becomes effective immediately.

   - **Automatically apply price file with renewal** - Select the **Yes** radio button if there is a price file associated with the contract and you would like to apply it automatically when the contract is renewed.

- **Renewal Term** - Enter a term for the contract renewal. The term you enter will calculate the new end date for the contract. For example, if you choose to set a renewal term of one year, the contract end date (or next renewal) will be a year from the renewed date.

- **Renewals Remaining** - Configure the number of automatic renewals for the contract. This value decrements each time the contract renews. Once it becomes **0**, the contract will no longer renew automatically.

4. Click **Save Changes** to save your work and remain on the header page. Click **Next** to save your work and move to the next page (**Attachments**).

Configuring Contract Details, Searchable Keywords, Hard Copy Location and Flex Fields

In the contract header, which contains the primary details about a contract, you can configure the details description, searchable keywords, hard copy location and flex fields.

1. Locate and expand the **Additional Details** section.

2. Configure the following fields:

- **Details** - Enter important information about the contract for quick reference. This information cannot be seen by end-users. The field will store up to 200 characters.

- **Searchable Keywords** - Enter words that can be used to locate the contract in **Contract Search** and the **Shopping** home page. **Note:** If you are adding non-catalog items to a contract and want to find them from the Shopping home page, you can search for the contract by item number or contract number to display non-catalog items in the results. However, if you want to search by **contract name** from the Shopping home page, enter the contract name in this field.

- **Hard Copy Location** - Enter information about where the physical paper copy of the contract is stored.

- **Flex Fields (Custom Organization Fields)** - Flex fields are organization-managed **custom** fields that can be used to gather additional information about a contract along with the default fields provided. There are eight flex fields available. Enter the appropriate information in each configured flex field. **Note:** The field name (Flex Field 1, Flex Field 2, etc.) can be renamed in Field Management. For additional information, please see "Field Management".

3. Click **Save Changes** to save your work and remain on Header page. Click **Next** to save your work and move to the next page (Attachments).

Contract Main Document and Other Attachments

You are able to include attachments with a contract. Attachments can include a "soft copy" of the contract and other supplemental information. You can also associate URL links with a contract by adding them as attachments.

Upload Main Document

You can designate one file or URL link as the Main Document. Generally, this will be the "soft copy" of the contract. The main document is added to the contract using the **Upload Main Document** button, or you can designate an existing attachment as the main document. On the Attachments page the main document is identified by a ♛ icon.

1. Open the appropriate contract for editing.

2. Click the **Upload Main Document** button on the left menu or go to the **Attachments** page where the same option will display.

   > **Note:** If a Main Document has already been flagged, the **Upload Main Document** button will display as **Open Main Document** in the left menu and will not display at all on the Attachments page. Please see **Managing Attachments** below for information about replacing the Main Document.

3. In the **Attachment Type** field, choose one of these options:

   - **Add My Own** - Select to add an attachment to a contract by uploading a file from your desktop.

   - **Link** - Select to list a URL link as an attachment to the contract.

4. Complete these fields based on the attachment type selected:

   - If you selected **Add My Own** - Click **Select file** to locate and add the file from your system, or drag and drop a file into the gray square surrounding the Select file field.

     > **Note:** When Excel files that exceed 5,000,000 characters are added as attachments to a contract, the entire attachment is available within the contract for viewing and downloading, as usual. When searching through attachment information, only the first 5,000,000 characters are evaluated in the search.

- If you selected **Link** - Enter a meaningful name for the page in the **Page Name** field and the URL link in the **URL** field. Click ⊕ to the right of the field to test the URL. **Note:** Page Name is not required. If you don't enter a value in that field, the name will default to the URL link text.

5. In the **Display Order** field, select the where you want the attachment to display in the sequence of attachments printed with the contract. You can choose to make the attachment First, Last or set where to display it in relation to other saved attachments.

6. In the **Contract Summary Visibility** field, select who can see the attachment on the Contract Summary page. Select **Use Summary Configuration Settings (default)**, to define access by the Full, Partial or Limited visibility controls on the contract, or **Admin/Managers Only** to make the attachment only visible to the contract manager and contract administrator.

7. Click **Save Changes**. The attachment will be added and displayed on the **Attachments** page. The main document is identified by the ♛ in the Attachments display.

Additional Contract Attachments

In addition to the Main Document, you can include other as attachments to provide supplemental information about the contract.

1. Open the appropriate contract for editing

2. Select **Attachments** in the left menu.

3. Click the **Add Attachments** button.

4. In the **Attachment Type** field, choose one of these options:

   - **Add My Own** - Select to add an attachment to a contract by uploading a file from your desktop.

   - **Link** - Select to list a URL link as an attachment to the contract.

   - **Create a Blank Word Document for Me** - Select to create a Word document that is separate from the contract main document. The document is saved as a contract attachment on the contract it is created in.

5. Complete these fields based on the attachment type selected:

   - If you selected **Add My Own** - Click **Select files...** to locate and add the file from your system, or drag and drop a file into the gray square surrounding the Select files.... field.

> **Note:** When Excel files that exceed 5,000,000 characters are added as attachments to a contract, the entire attachment is available within the contract for viewing and downloading, as usual. When searching through attachment information, only the first 5,000,000 characters are evaluated in the search.

- If you selected **Link** - Enter a meaningful name for the page in the **Page Name** field and the URL link in the **URL** field. Click 🌐 to the right of the field to test the URL. **Note:** Page Name is not required. If you don't enter a value in that field, the name will default to the URL link text.

- If you selected **Create a Blank Word Document for Me** - Enter a name for the attachment in the **File name** field.

6. In the **Display Order** field, select the where you want the attachment to display in the sequence of attachments printed with the contract. You can choose to make the attachment First, Last or set where to display it in relation to other saved attachments.

7. In the **Contract Summary Visibility** field, select who can see the attachment on the Contract Summary page. Select **Use Summary Configuration Settings (default)**, to define access by the Full, Partial or Limited visibility controls on the contract, or **Admin/Managers Only** to make the attachment only visible to the contract manager and contract administrator.

8. Click **Save Changes**. The attachment will be added and displayed on the **Attachments** page.

Managing Contract Attachments

An **Actions** menu is displayed in the far-right column of each attachment in the attachments list. From this menu, you can edit attachment properties, download the file, designate the attachment as the main document, or delete it. In addition, you can choose to go to the link for URL attachments or download the document for File attachments.

Changing the Main Document

You can change which document is flagged as the Main Document. There are two options. You can first unassign the current main document and then set another attachment as the main document, or you can use the Replace as Main Document option to replace the current main document with another attachment:

- To attach a new file or link as the Main Document, follow the steps for uploading above.

- To flag an existing attachment as the Main Document, click the attachment's **Actions** menu and select **Set as Main Document** or **Replace as Main Document**.

eProcurement Setup

Configuring eProcurement Information on Contracts

The eProcurement section on a contract contains all information and configurations related to shopping from a contract, such as budgeting, spend, applicability, related goods and services, and PO clauses. This is also where users make a contract active for shopping or publish it to one or more consortium members if your organization uses the Consortium feature.

The sections below provide information and configuration instructions for each section of the eProcurement Setup page. These pages are only available for organizations using eProcurement.

Configuring the Main Details of eProcurement Setup

1. Open the appropriate contract for editing.

2. In the left menu click **eProcurement Setup**.

3. Configure the main details in the top section as follows:

   - **Active for Shopping** - Indicates whether or not a contract is available for shopping. The checkbox is only displayed once a contract reaches its start date.

     The checkbox defaults to **No**, but the system will automatically switch the setting to **Yes** once a contract reaches the contract start date. **Yes** indicates that the contract can be viewed and used for shopping. The system will automatically switch the Active for Shopping checkbox to **No** (if it is not already No) when the contract end date has been reached.

     > **Note:** Only eProcurement contracts that are both Active for Shopping and in effect are available to add to line items when shopping. You can select or clear the Active for Shopping checkbox manually and save changes while the contract is in effect to override system settings.

   - **Restrict Products To** - This checkbox is displayed once a contract reaches the start date. Select **Any Supplier Product** to make the contract available for use on all products purchased from this supplier, or select **Only for Specified Product SKUs or UNSPSCs** to limit the products that can be purchased against the contract to the ones listed on the **By Products/SKUs** or **By UNSPSC** tabs on the contract.

     > **Note:** All other accessibility rules will apply no matter what setting is chosen here.

- **Automatically Apply Purchases from this Supplier to this Contract** - To make a contract automatically be associated with a line item in a cart if certain criteria is met, click the **Yes** radio button. This option is HIGHLY recommended if there will only be one contract for the supplier AND all purchases are from this contract. For example, if your organization has a general contract for computers from Dell, you may choose to Apply Automatically. If this option is not selected, the user (requisitioner, approver, or buyer) must manually associate the line item(s) with the contract. In the event that there are multiple applicable contracts for a single line, there is a hierarchy in terms of which the system will apply:
  - The user is a contract manager for the contract.
  - The user is explicitly listed in the "By User" table for the contract.
  - The user's department is explicitly listed in Available Departments.
  - The user's role is explicitly listed in Available Roles.
  - The contract with the oldest activation date.
  - Alphabetical by contract name.

- **Blanket PO Number** - If you would like to use a Blanket (Standing) Purchase Order number each time the contract is used, enter the number in Blanket PO Number field.

- **Allow Portal Invoice Enabled Suppliers to Edit Contract Item Price** - Click **Yes** (default) to allow suppliers to edit a contract non-catalog item's price on line items that have been populated from the contract on portal invoices or credit memos. Click **No** if they cannot. **Note:** This setting applies to price only. Part No., Description, Product Size, Packaging, and Extended Price fields cannot be edited by a supplier even if this setting is enabled.

- **Evaluated Receipt Settlement** - This field is displayed if your organization has the Evaluated Receiving Settlement feature enabled and the supplier on the contract is in the ERS supplier class. The field is read-only unless you have permission to modify the field. Click **Yes** to allow non-PO invoices to be generated from the contract for non-catalog goods or service items that have already been received. This causes an Invoice for Goods or Services Received checkbox to be displayed on the Create Invoice window when a non-PO invoice is created from the contract. **No** is the default setting and indicates that ERS invoices cannot be generated from the contract.

- **Restrict Products To** - By default, this field is set to **Any Supplier Product** which means all of the supplier's products apply to the contract. To limit the contract to only specific products, select **Only for Specified Products, SKUs or UNSPSCs**.

4. Click **Save Changes** to save your work and remain on Setup page. Click **Next** to save your work and move to the next page.

Payment Terms

Contract payment terms are displayed on non-PO invoices or invoice items generated from a contract. Users creating invoices can use contract payment terms instead of organization or supplier default payment terms.

1. Open the appropriate contract for editing.

2. In the left menu click **eProcurement Setup**. The **eProcurement Setup** page will open.

3. Enter payment terms in the **Payment Terms** section.

   The first two fields on payment terms are used to define any discount that would be applied for early payment, and the last two fields are used to calculate the due date for the full invoice amount. Your organization may have set up a list of payment terms that can be selected. If the fields are editable, payment terms can be entered as follows:

   - **Discount** - This is the value of the discount that will be applied to the invoice total if payment is made before the number of days indicated in the Days field. This can be a percentage or a specific amount.

   - **Days** - This is the number of days after receipt of an invoice that the discount can be applied. After this number of days, the full invoice amount is due on the invoice due date that has been calculated from values in the Type and Days After field.

   - **Type** - Determines how the invoice due date will be calculated. **Net** is the only option that can be selected if no other payment term types are enabled. Additional payment types **EOM**, **MFI**, **Manual** and **EOQ** are available for selection if they have been activated for use by your organization.

   - **Days After** - Is used to add extra days to the invoice payment Type to extend the due date of an invoice. The field is required, optional or not available depending on the payment Type selected.

   If your organization has set up standard payment terms, a **Standard Payment Terms** field is displayed and the Discount, Days, Type and Days After fields are read-only fields that show information for the selected payment term. Standard payment terms can be selected as follows:

   - **Select a different standard payment term**. The Discount, Days, Type and Days After fields will show values for the selected payment term. On documents, this can only be done while a document is editable.

   - If an **Override Discount Terms** checkbox is displayed, it can be selected to change the **Discount** and **Days** field values for a standard payment term. The Type and Days After fields remain read-only. If the checkbox is cleared, the payment terms return to standard payment term's default settings.

4. Once contract payment terms are saved, the **Potential Early Payment Savings** section shows the amount that could *potentially* be saved if early payments are made on invoices created from the contract using the contract payment terms. Two amounts are calculated:

- **This Version** - Shows the potential savings that could be made if early payments are made on invoices created from the current version of the contract only.

- **My Lifetime** - Shows the potential savings that could be made if early payments are made on invoices created from all versions of the contract.

Pricing (Price Set/Hosted Catalog Configuration)

Follow the instructions below to configure the price set options for a contract.

1. Open the appropriate contract for editing.

2. In the left menu click **eProcurement Setup**. The **eProcurement Setup** page will open. Locate the **Pricing** section.

3. Configure the fields:

- **Needs Price Set** - Click **Yes** to indicate that the contract is associated with a hosted catalog (price file).

- **Associated Price Set** - Click the **Select Price Set** button to choose the supplier price file to associate with the contract. Available price sets display for you to select from.

4. Click **Save Changes** to save your work and remain on Setup page. Click **Next** to save your work and move to the next page.

See also in the online searchable help.

Supplier Visible Custom Field

Organizations can designate a custom field that may be made visible to suppliers creating invoices from a contract. The Supplier Visible Custom Field section is where contract managers choose to make that custom field visible to suppliers for a specific contract, and also indicate whether suppliers are required to complete the field before submitting an invoice.

The Supplier Visible Custom Field feature must be configured for your organization to perform this task.

1. Open the appropriate contract for editing.

2. In the left menu click **eProcurement Setup**.

3. Locate the **Supplier Visible Custom Fields** section. The custom field that your organization has permitted to be made visible to suppliers is displayed next to **Available Custom Field**. The message "There is no supplier visible custom field configured" is displayed if your organization has not set up a custom field that can be made visible to suppliers.

4. The **Do you want portal invoicing enabled Suppliers to complete the selected Custom Field on Invoices created from this contract?** field is used to make the organization custom field visible to suppliers creating invoices from the contract. Select **Yes** to make the custom field visible to suppliers. They will be able to see the field on supplier invoice line items and enter a value. They will also be able to copy lines with the field and select different values for each line. Select **No** if the organization custom field should not be visible to suppliers for the contract. No is the default setting.

   > **Note:***All* values that can be selected in the custom field are visible to suppliers on contracts designated to be exposed.

5. The **Is this required to be completed by the Supplier?** field is displayed if Yes is selected in the **Do you want portal invoicing enabled Suppliers to complete the selected Custom Field on Invoices created from this contract?** field, and is used to make the visible custom field required. Select **Yes** if suppliers must complete the field before they can submit an invoice. Select **No** if the field is not required.

6. Click **Save Changes**.

Code Defaults on Invoice (displayed once a supplier or second party is selected)

The **Code Defaults on Invoices** section contains default account codes that are automatically applied to invoice line items assigned to the contract. This section is only displayed once a supplier is saved to the contract. The fields displayed are unique to each organization. Default account codes on a contract are also referred to as contract account codes.

Complete the following steps to define contract account codes on a contract.

1. Open the appropriate contract for editing.

2. In the left menu click **eProcurement Setup**.

3. Locate the **Code Defaults on Invoice** section. This section is only displayed if a supplier has been saved to the contract. Contract account code fields configured for your organization are listed under subheadings (account code groups).

4. Click the **Add** link to the right of the appropriate subheading.

5. Select default account codes for a field by selecting one of the following options:

    - **Select from all profile values...** to add account codes from your user profile code favorites.

      > **Note:** This requires that you have explicit permissions to the custom fields and that you have selected code favorites in your user profile.

    - **Select from all values...** to add account codes set up for your organization.

6. (optional) Click **add split** on the right if you want to divide line item costs between multiple accounting codes. Define how the costs are split by first selecting **% of Price** or **% of Qty** from the top right corner drop down field, then enter a positive value on each line. The total of all split values should equal 100%. Click **recalculate / validate values** to refresh the calculations or **remove** to delete a line.

7. Click **Save**.

8. Subsequent changes to the codes are made by clicking **Edit** or **Delete** to the right of the appropriate subheading. Codes can be edited until the contract is expired or completed. Deleting code values removes them from the contract but does not affect the field they were listed in.

Administrative Fee

The **Administrative Fee** is a price markup percentage that can be assigned to hosted catalog items within the contract. When the markup is applied, the percentage will be added to all hosted catalog items. The contract price plus the markup percentage will display in search results, be applied to items in the cart and distributed to the contracted supplier. The shopper will not see the markup amount per item. The markup percentage can be applied to the entire organization or by business unit. **Note:** The percentage does not apply to Forms and Non-Catalog Items defined on the contract.

1. Open the appropriate contract for editing.

2. In the left menu click **eProcurement Setup**.

3. Configure the Administrative Fee section:

    - Choose the appropriate radio button to apply an organization fee or a business unit fee. **Note:** The fee can be set for both levels.

    - In the **Organization Fee** field, enter the mark-up percentage.

4. Click **Save Changes** to save your work and remain on Setup page. Click **Next** to save your work and move to the next page.

Display Options in Browse Contracts

In the **Display Options in Browse Contracts** section, the **Show Generic Non-Catalog Item in Browse Contracts** field determines if the contract's items will be listed when a user who chooses to display associated forms and non-catalog requests searches for contracts. **Note:** If you have not enabled non-catalog entry, this field will not be visible.

1. Open the appropriate contract for editing.

2. In the left menu click **eProcurement Setup**.

3. Configure the field by selecting one of the following options next to **Show Generic Non-Catalog Item in Browse Contracts**:

    - Click the **Yes** radio button to display the contract.

    - Click the **No** radio button to prevent the contract from being displayed. **Note:** Choosing to not display the contract does not prevent users from making non-catalog item purchases against a contract, but only prevents the non-catalog option from displaying when the user is browsing through contracts.

    - Click the **Inherit from Contract Type** radio button to inherit the setting from the assigned contract type. **Note:** The current setting for the contract type displays to the right of the option.

4. Click **Save Changes** to save your work and remain on Setup page. Click **Next** to save your work and move to the next page.

Contract Budget and Spend

For organizations using eProcurement, the **Budget and Spend** page is where to manage budget and spend information on a contract:

- During **contract creation** it is used to enter the contract budget and set minimum/maximum limits for contract spend and line item quantities. These settings will trigger validation messages when assigning the contract to requisitions, purchase orders or invoices, as configured for your organization. The contract budget and minimum/maximum limits can be revised at any time.

- Throughout the **lifetime of a contract** it is used to review contract spend information for all versions of the contract, as well as make adjustments to spend totals, access related records, or open a different version of the contract.

PR, PO and Invoice Spend totals for a contract are calculated as follows:

- When the contract is **added**, **removed** or **assigned** to purchase requisitions, purchase orders and invoices. For more information on performing these actions, see the following topics: and Assigning Contracts and Adding Contract Lines to Invoices. For information on

creating a non-PO invoice from a contract, see Create a Non-PO Invoice from a Contract.

- PR, PO and Invoice Spend totals also include **manual adjustments** made to PR, PO, and Invoice Spend on the Budget and Spend page. For more information on making manual adjustments, see Adjust Contract Spend.

The following areas on the Budget and Spend page are used to enter and view contract budget information:

Budget and Enforce Budget

The value entered in the **Budget** field is the expected total spend amount for the contract for the current renewal period. This figure is used as a benchmark to compare to actual spend figures as users associate line item spend with each contract. It also is used in remaining budget calculations that show the budget in relation to spend assigned to the contract. The budget can be updated at any time. When a contract is renewed, the existing budget amount is copied to the renewal.

The **Enforce Budget** option is used to indicate that the contract budget should be evaluated when users place orders for items associated with the contract. If set to Yes, validation checks will compare line item totals on requisitions, purchase orders and invoices against the contract budget. If the total from all lines assigned to the contract on the document is greater than the remaining budget on the contract, an error or warning will appear, as set by your organization. The Enforce Budget option may also be used with workflow process configuration to route the order to a specific approval folder if the contract budget is exceeded with the order. **Note:** Workflow and/or Cart changes are required to take advantage of this feature.

Charts

The **Budget Summary** bar chart shows spend totals for the open contract. Grouped by PR Spend, PO Spend and Invoice Spend, each bar shows the **percentage** that each spend total represents of the total contract budget, and how many dollars remain in each case. Clicking on a remaining dollar value opens an overlay showing details of the calculation. If the budget for a contract is $0, this chart is hidden.

The chart is color-coded to indicate when spend totals are approaching the contract budget:

- Green indicates spend that is 74% or less of the total contract budget.
- Yellow indicates spend that is between 75% and 94% of the total contract budget.
- Red indicates spend that is 95% or more of the total contract budget.

The **Lifetime Summary** bar chart shows spend for PR's, PO's and Invoices for all versions of the contract, color coded by version. It provides a look at data from the Actual Spend by Version section in a graphic format. You can toggle the renewal and amendment versions listed in the legend on and off so that the bar graph only shows data for the selected version(s).

Actual Spend by Version

The **Actual Spend by Version** section provides key information on contract spend for each version of a contract. PR Spend, PO Spend and Invoice Spend totals are listed in columns, and information for each renewal and each amendment (if applicable) is displayed on a separate row.

- **PR Spend** - The total amount of spend on requisition lines that have been assigned to the contract version, and that the organization has processed. This figure represents spend for those line items that complete any necessary workflow or that are returned to an ERP system. Note that this value does not include tax or shipping estimations.

- **PO Spend** - The total amount of spend on purchase order lines that have been assigned to the contract version, and that the organization has processed. This value is only tracked for organizations that have licensed Order Manager. The figure represents spend for PO line items assigned to the contract when the purchase order is finalized (with a Revision number of 0+). Note that this value does not include tax or shipping estimations; nor does it currently include changes made on PO Revisions.

- **Invoice Spend** - The total amount of invoice lines assigned to the contract version, and that the organization has processed. This value is considered to be the most relevant of the Spend values. This value only appears if the organization has the Invoicing license. Note that this value does not include tax or shipping estimations or invoices.

You can also complete the following tasks in this section:

- You can **change contract versions** from within the Budget and Spend page. This Version on a row indicates the contract version you are in. On any row in the Actual Spend by Version table, click the information icon 🛈 to open the contract version's Contract Summary page. From there, clicking **Go to Contract** will refresh the page and open that version of the contract. The This Version indicator moves to the row of the newly opened contract. The values displayed in the Lifetime Spend table in the top left corner of the page do not change as they are calculated for all versions of the contract.

- **Remaining budget** calculations are shown for **each spend total** on **each renewal** and **each amendment** (if applicable). Under each spend total, it shows the percentage that the spend total reflects of the total budget for that version along with the contract budget for that version. For example, if a contract has a budget of $100.00 and the PR Spend total is $90.00, the remaining budget information displayed under the PR Spend total would be (90% of $100.00).

- **Adjustments** can be made to PR, PO and Invoice totals for any version of the contract by clicking the **Adjust** button in the appropriate row.

> **Note:** For organizations using Contract Compliance Tracking only, the Actual Spend by Version table will not show amendments as CCT does not use amendments.

- Clicking a PR Spend, PO Spend or Invoice Spend **value** will open a **Document Search** page where all records related to that value are listed. For example, clicking a PR Spend total will direct you to a Document Search page that lists all the purchase requisitions with line items assigned to the contract version.

Depending on your system settings, it may take up to 24 hours for the Actual Spend by Version totals to reflect new PR, PO and Invoice Spend amounts assigned to the contract.

Published Member Spend

For consortium parents and members, the **Published Member Spend** section contains the same type of information as the Actual Spend by Version table, but the data is specific to consortium members. An additional **Published Members** column shows the total number of members to which the contract is published. Clicking the hyperlink in this column will open a window showing spend per consortium member. You cannot use the 🛈 icon to change contract versions or click on a value to view open related documents in the Published Member Spend table.

Invoice and Requisition Limits

These two sections are used to set minimum and maximum limits for contract spend and line item quantities. If set up for your organization, limits entered here will trigger validation messages when assigning the contract to requisitions or invoices:

- The **Limits Per Requisition** section allows users to set minimum and maximum limits for contract spend and line item quantities for contract requisitions.

- The **Limits Per Invoice** section allows users to set minimum and maximum limits for contract spend and line item quantities for contract invoices. A **Same as Requisitions** checkbox allows the minimum and maximum values that have been entered for requisitions to be automatically applied to invoices without entering the information twice. If the checkbox is selected, the Limits Per Invoice section will collapse and values entered in the Limits Per Requisition section will be used for invoices. If the checkbox is blank, the Limits Per Invoice section will expand and values entered in Limits Per Invoices section will be used for invoices.

Reports

- The **Contract Spend by Department Report** is for organizations that use Departments. This report breaks up the total contract spend "by Department". Each department has a separate line in the report and there are two additional lines: No Department (for spend that wasn't associated to a department) and Manual Balance Adjustments (which is a summary of "manual" adjustments that were made to the contract spend via the user interface on the Budget/Spend tab). Like the Summary report, the spend is separated by PR, PO and Invoice (S&H and Taxes separated, too).

- The **Contract Summary Report** displays all of the "spend" recorded in the system for the contract – including all renewals. It is separated by PR, PO and Invoice, and the Invoice spend is separated by Shipping & Handling and Taxes. In addition, the report shows the number of PO transactions that took place against the contract and the summary of "Quantity" for the lines in the PO.

- The **Contract Spend by Member Report** is only available for consortium parent organizations. This report breaks up the total contract spend "by Member". Each member has a separate line in the report. Like the Summary report, the spend is separated by PR, PO and Invoice (S&H and Taxes are separated, too).

- The **Top 50 Items Report** returns the top 50 items purchased for the selected contract based on total spend for each item. A record in the report is represented by a unique combination of product SKU/catalog number, item type, product size, and UOM/Packaging for the selected supplier and contract. The report measures spend related to completed purchase requisitions only; pending or draft requisitions are not part of this report. The report is run against the specific renewal term of the selected contract. **Note:** Items with the same catalog number may appear multiple times in the report if item criteria differed.

Set Contract Budget and Min/Max Limits

For organizations using eProcurement, the **Budget and Spend** page is used during contract creation to enter the contract budget and set minimum/maximum limits for contract spend and line item quantities. These settings will trigger validation messages when assigning the contract to requisitions, purchase orders or invoices, as configured for your organization. The contract budget and minimum/maximum limits are usually set during contract creation, but can be revised at any time.

For This Version

The value entered in the **Budget** field is the expected total spend amount for the contract for the current renewal period. This figure is used as a benchmark to compare to actual spend figures as users associate line item spend with each contract. It also is used in remaining budget calculations that show the budget in relation to spend assigned to the contract. The budget can be updated at any time. When a contract is renewed, the existing budget amount is copied to the renewal.

The **Enforce Budget** option is used to indicate that the contract budget should be evaluated when users place orders for items associated with the contract. If set to Yes, validation checks will compare line item totals on requisitions, purchase orders and invoices against the contract budget. If the total from all lines assigned to the contract on the document is greater than the remaining budget on the contract, an error or warning will be displayed, as set by your

organization. The Enforce Budget option may also be used with workflow process configuration to route the order to a specific approval folder if the contract budget is exceeded with the order. **Note:** Workflow and/or Cart changes are required to take advantage of this feature.

Actual Spend Per Requisition

Consortium Contracts

For consortium contracts, a **Published Member Spend** section displays the same type of information as the Actual Spend by Version section, but the data is specific to consortium members. It contains an additional **Published Members** column that shows the total number of members to which the contract is published. Clicking the hyperlink in this column opens a breakdown of spend per consortium member, providing a complete picture of how spend has been allocated across the consortium for the contract.

Limits Per Requisition and Limits per Invoice

These two sections are used to set minimum and maximum limits for contract spend and line item quantities. If set up for your organization, limits entered here will trigger validation messages when assigning the contract to requisitions or invoices. These settings are used with document setup validation rules in order to trigger warning or error messages to shoppers or assigned approvers, and with workflow process configuration to route the order to a specific approval folder.

Set Contract Budget and Minimum/Maximum Limits

1. Navigate to **Contracts** ⊞ **> Contracts > Search Contracts** (or **Contracts Home** if you have the appropriate permissions).

2. Search for and open the appropriate contract for editing.

3. In the left menu, select **Budget and Spend**.

4. Complete the contract budget fields as follows:

   - **Budget** - Enter the expected total spend amount for the contract for the current renewal period.

   - **Enforce Budget** - Click the **Yes** radio button to indicate that the contract budget should be evaluated when users place orders for items associated with the contract. **Note:** Workflow and/or Cart changes are required to take advantage of this feature.

5. (optional) In the **Limits Per Requisition** section, complete the following fields to set minimum and maximum limits for requisitions. If set up for your organization, limits entered here will trigger validation messages when assigning the contract to requisitions:

- **Contract Spend - Minimum Allowed** - Enter a value here (greater than 0) if you would like purchases assigned to this contract to be a minimum dollar amount per purchase requisition. If the cost of the items against this contract on the order do not meet the minimum listed amount, a warning or error is indicated on the requisition. For example, if the value is $200.00, and a single order has items against the contract that are $100, the organization may configure that the shopper receive a warning or error before submitting the order, or that the order routes in workflow for approval.

- **Contract Spend - Maximum Allowed** - Enter a value here (greater than 0) if you would like purchases assigned to this contract to be limited to a specific dollar amount per purchase requisition. If the cost of the items against this contract on the order exceed the listed amount, a warning or error is indicated on the requisition. For example, if the value is $200.00, then if a single order has items against the contract that exceed $200, the organization may configure that the shopper receive a warning or error before submitting the order, or that the order routes in workflow for approval.

- **Line Item Quantity - Minimum Allowed** - Enter a value here (greater than 1) if you would like purchases assigned to this contract to be a minimum quantity per line item. If the quantity of items do not meet the minimum listed amount, a warning or error is indicated on the requisition. For example, if the value is 4, and a single order has an item with 2 as the quantity, the organization may configure that the shopper receive a warning or error before submitting the order, or that the order routes in workflow for approval.

- **Line Item Quantity - Maximum Allowed** - Enter a value here (greater than 0) if you would like purchases assigned to this contract to be limited to a specific quantity per line item. If the quantity of items assigned to the contract on the order exceeds the listed quantity, a warning or error is indicated on the requisition.

6. In the **Limits Per Invoice** section, choose one of the following options. If set up for your organization, limits entered here will trigger validation messages when assigning the contract to invoices:

   - Select the **Same as Requisitions** checkbox if you want the same limits that have been entered for requisitions to also apply to invoices. If the checkbox is selected, the Limits Per Invoice section will collapse, and values entered in the Limits Per Requisition section will be used for invoices. If the checkbox is blank, the Limits Per Invoice section will expand and values entered in Limits Per Invoices section will be used for invoices.

   - Leave the **Same as Requisitions checkbox** blank if you want to enter minimum and maximum limits that will apply to invoices only, then complete the Minimum Allowed and Maximum Allowed fields for contract spend and line item quantity.

7. Click **Save Changes**.

Configure Contract Applicability for Users, Products and Supplier Fulfillment Centers

When configuring a contract, an important step is configuring contract applicability. The application allows you to set up how a contract applies to Departments/Roles/Business Units, Users, Product/SKU, UNSPSC and Fulfillment Centers.

Applying the Contract to Users based on Department, Role or Business Unit

You can define which specific departments and/or roles are allowed to use a contract.

For example, a contract with Dell computers may only be used by individuals in the IT department. Contract access can also be granted at the role-level. For example, some organizations use roles to identify different physical locations (City 1, City 2), so you can use the combination of role and department to indicate that only the Chemistry department at Campus B can use the contract. Keep in mind, the department selection is derived from the department selected in the user's profile. Additionally, you can make the contract available only to specific business units. For example, you might have a catering vendor who is available only in North Carolina. You could make a contract with that supplier available only to the North Carolina business unit.

Follow these steps to apply a contract by department, role or business unit. **Note:** If you wish to allow all users to have access to the contract, no action is necessary.

1. Open the appropriate contract for editing.

2. In the left menu, click **Applies To**. The **Applies To** page opens with the **Department or Role** tab open.

3. If not already enabled, click the **Grant access to this contract using Departments and Roles** checkbox. Available Business Units, Available Departments and Available Roles are displayed on the page. **Note:** If your organization does not use the Multi-Business Unit feature, that section will not display.

4. Select the appropriate values from the left side of the window and click the ▶ button to move the department or role to the right side of the screen. The departments, roles or business units with access in the right side of the window.

5. Click **Save Changes** to save your work.

Applying the Contract to Specific Users

You can give specific users access to a contract.

You can assign contract access to specific users on the Additional Users tab. **Note:** A user must have access to a contract before they can view it on a form. For example, if a form is used to create a requisition and is linked to a specific contract when the user fills it out, the approver or prepared-for user must also have access to the linked contract before they can move the form containing the contract through workflow.

1. Open the appropriate contract for editing.

2. In the left menu, click **Applies To**. The **Applies To** page opens.

3. Click the **Additional Users** tab. If there are currently users assigned access to the contract, the user names are displayed.

4. Click the **Add Users** button assign contract access to one or more users. A user must have access to a contract before they can view it on a form.

   - Enter a name or partial name in the search field and click **Search**. You can also leave the field blank to return a list of all eligible users.

   - Select **Add User** next to each user you want to add to the contract.

   - Click **Close**.

5. Click **Save Changes**.

6. To remove a user, click 🗑 to the left of the user's name.

Applying the Contract to Specific Products/SKUs

Organizations can associate a contract with one or more products (using catalog numbers) from a supplier. Once a catalog number has been associated with a contract, any time the item is ordered, the contract number can be automatically assigned to the purchase and the spend tracked to the contract. This functionality is important when contracts are associated with only a portion of the supplier catalog or when tracking spend for blanket orders. This functionality can be used for hosted, punch-out and non-catalog items. In addition, organizations can use this functionality to "audit" pricing.

Follow these steps to assign products/SKUs to a contract.

1. Open the appropriate contract for editing.

2. In the left menu, click **Applies To**. The **Applies To** page opens.

3. Click on the **Product/SKU** tab. If there are currently products associated with the contract they will display. Before adding a new product, you should first confirm that the product has not already been assigned to the contract. If there are a large number of products, you can search for the product by Catalog Number/SKU or Description.

4. To add a product click the **Add Product/SKU** button.

5. If this applies to a hosted catalog, enter the catalog number and then click the search icon. If the product is not found, or if this is a punch-out or non-catalog product, complete the description as well as the remaining fields.

   Important:

   For applicability rules, the system first looks to see if there is a product number match with the catalog number. If there is a match the application will then look to see if there is a supplier size designated for the product with a contract. If a supplier size is included in the contract the application will then apply that to the match criteria. Next, the system will look to the packaging size and finally the color. Organizations need to have an understanding of the supplier's catalog to determine which fields should be included to determine unique products. For example a supplier may use the same catalog number for 3 hole punch paper, but then designate one as a pack (150/pack), one as ream, and one as a case. Many suppliers will designate these with different catalog numbers. If so, the catalog number is the only field that should be needed in the Product Association. However, if the catalog number is not unique, the catalog number plus the supplier packaging must be used to determine if the contract should apply.

6. To remove products, click the checkbox in the far-right column for each appropriate product and then click the **Remove Selected** link.

Importing/Exporting Applicable Products

You can import and export products associated with a contract. The import feature is helpful when you want to associate multiple products. To import or export products, click on the Import/Export sub-tab. The **Detailed Contract Product Import Instructions** guide located on this tab provides detailed instructions.

Applying the Contract to Specific UNSPSC Codes

Organizations can define a list of UNSPSCs that apply to a contract. When a USNSPC is associated to a contract, any time an item is ordered from the contract's supplier that matches the UNSPSC on the contract, the contract number can be automatically assigned to the purchase and the spend tracked to the contract. This functionality is important when contracts are associated with specific categories within the supplier's catalog, especially if the products within those categories change frequently. This functionality can be used for hosted, punch-out and non-catalog items.

Follow these steps to apply a contract to specific UNSPSC codes.

1. Open the appropriate contract for editing.

2. In the left menu, click **Applies To**. The **Applies To** page opens.

3. Click on the **UNSPSC** tab. If there are currently codes assigned to the contract, the codes are displayed.

4. Enter a value in the UNSPSC field. The field auto-completes as you enter the UNSPSC.

5. Click the **Add UNSPSC** button. The code will be added.

6. To remove UNSPSC code, click the checkbox in the far-right column for each appropriate code and then click the **Remove Selected** link.

Applying the Contract to Specific Fulfillment Centers (Supplier Addresses)

In some cases, you may have a contract that is only applicable to one or more fulfillment centers for a supplier. For example, DoubleTree hotels might be listed as a single supplier with multiple locations throughout the country. You may have a special $79/night agreement with DoubleTree for the hotel close to your organization. In this case, you would want to indicate on the contract which location applies to the agreement. **Note:** If the supplier or contract party has not created fulfillment centers, this task is not applicable.

Follow these steps to limit the contract to specific fulfillment centers.

1. Open the appropriate contract for editing.

2. In the left menu, click **Applies To**. The **Applies To** page opens.

3. Click on the **Fulfillment Center** tab. If there are currently fulfillment centers assigned they will be displayed in the Fulfillment Address(es) Assigned to this Contract window on the right.

4. To add fulfillment centers, click the appropriate values from the **Available Fulfillment Addresses** window on the left and click ▸.

5. Click the **Save Changes** button to save your work. Note: If you do not select specific fulfillment centers the contract will apply to all fulfillment centers.

Configure Contract Goods and Services (Forms, Non-Catalog and Other Items)

In addition to catalog items, organizations are able to associate other types of items to the contract. This functionality is managed through the **Goods and Services** page. You can apply forms and non-catalog items that can be ordered through the application. In addition you can provide instructions for ordering items outside of the application. If your organization uses the Item Master, you can view the items through the **Goods and Services** page as well.

Associate a Form with a Contract

With this feature, you can associate a form with a contract type, create a 1:1 relationship where you have a single form associated with a single contract or multiple contracts, and pre-fill several different forms and associate all of them to a contract for shoppers to select. For example, you may associate your Service Form with the contract type "Services" so that all services contracts will inherit this form. Or if you have a unique Service Form for a specific supplier, you could do a 1:1 association on the contract in this case. Or if you have a supplier agreement for different services under the contract, you could create a form for each service and associate each of the forms to the contract.

Note: A user must have access to a contract before they can view it on a form. For example, if a form is used to create a requisition and is linked to a specific contract when the user fills it out, the Approver or Prepared-for user must have access to the contract on the form before the form containing the contract will move through the workflow.

Follow these steps to associate forms with a contract. **Note:** This task assumes that there are forms created for your organization. For information about creating forms, please see "Forms and Requests Overview" on page 326.

1. Open the appropriate contract for editing.

2. In the left menu, click **Goods and Services**. The page will open with the **Forms** tab active.

3. In the **Options** section click the **Yes** radio button for the **Show Contract forms in Product Search Results** field to allow users to search for the form and locate it via product search (this is the typical configuration).

4. Existing forms are displayed in the **Contract Forms** section. A default form that is inherited from the contract type associated with the contract is automatically associated. Click the **view form availability** link to view and access the locations where the form has been assigned in other areas of the application.

5. To add a form, click the **Add Form** button.

6. A pop-up window containing all active forms displays. You can preview the form by clicking ⏷ on the associated **Select** button and selecting **Preview**. To choose the form, click **Select**.

7. You can add the form to your favorites by clicking on the associated **Add to Favorites** button.

8. Click **Save Changes** to save your work.

To remove a form from the contract, click the ⏷ on the associated Add to Favorites button.

Add Ordering Instructions to a Contract for Items Procured Outside of the Application

You can associate ordering instructions for items or services purchased outside of JAGGAER. With ordering instructions, you can provide step by step instructions to users on how to purchase an item or service using the contract. For example, you can provide instructions on how to rent a car from a contracted car service. When a shopper with access to the contract enters search terms that match the contract, the ordering instructions will be returned in the search results.

Follow these steps to add ordering instructions for contract items or services outside of JAGGAER.

1. Open the appropriate contract for editing.

2. In the left menu, click **Goods and Services**.

3. Click the **Ordering Instructions** tab.

4. Click the **Yes** radio button for the **Display this Contract in Product Search Results** field if you want to allow contract-specific ordering instructions to be displayed directly in product search results when a user enters search terms that result in a match to the contract.

   > **Note:** When ordering instructions appear in product search results, they do not have an Add to Cart button because these purchases typically happen outside of JAGGAER. In order to apply the spend to your contract in the system, make a manual adjustment on the contract's spend when the order is invoiced.

5. Enter a concise description in the **Product Description** field. This is the top line displayed in the product search results and is indexed for search.

6. Enter any additional text in the **Additional Information** field. This field should contain any additional information about the product. Format the text using the available formatting options.

7. In the **Ordering Instructions** dropdown, select how and when you want to ordering instructions to be displayed in the product search results;

   - **None**- Select this option if the information you provided above is sufficient and you do not need to include any additional instructions.

   - **Use Attachments**- Select this option if you would like to attach documents or URL links to the ordering instructions. You can include multiple attachments.

   - **Use Rich Text** - Select this option if you want to display the ordering instructions in a pop-up window to the user. Enter and format the text in the provided area.

8. Choose if you want an image to display with the ordering instructions in your search results.

9. Click the **Save Changes** button to save your work.

10. Click the **Preview** button in the top-right corner to preview your ordering instructions.

Adding Non-Catalog Items to a Contract

When a contract covers a set of products that are not provided in a catalog by the supplier or contract party, a contract administrator can add these products as non-catalog items to the contract. There are two main differences between contract non-catalog items and regular non-catalog items. First, the details of contract non-catalog items cannot be edited by shoppers. And second, contract non-catalog items can only be purchased under contract and are therefore hidden from customers who do not have access to the contract, and the contract is always automatically applied to the item on the cart. **Note**: Contract non-catalog items are not used in place of a hosted catalog because they have a limited set of item attributes and they can only be administered by users with access to the contract.

Contract Non-Catalog Items can be added manually through the user interface described below, or they can be imported. For more information on how to import products, please refer to the **Contract Non-Catalog Item Import Guide**, which is available by clicking the **Detailed Contract Non-Catalog Items Import Instructions** link on the **View Import/Export Results** sub-tab.

Note: **JAGGAER ONE Cross-Module Integrations**customers who have enabled a Sourcing+ (JA) Contract for eProcurement must add new items in the Sourcing+ Contract, and then sync items over to the eProcurement contract. See "JAGGAER ONE Cross-Module Integrations Contracts Managed in Sourcing+" on page 691 for additional information about managing items.

Follow these steps to assign non-catalog items to the contract.

1. Open the appropriate contract for editing.

2. In the left menu, click **Goods and Services**.

3. Click the **Non-Catalog Items** tab.

4. If there are any existing non-catalog items they will display on this page. To add a new item, click the **Add Contract Non-Catalog Item** button.

5. Add details about the product in each of the fields. These contract items should be as detailed as possible.

6. Click the **Save** button to save the information. **Note:** It may take several minutes for the non-catalog item to show in search results.

7. To remove non-catalog items, click the far-right checkbox for all of the appropriate items and then click **Remove Selected**.

Contract Item Master (for customers using Item Master)

If your organization uses the Item Master functionality, you can view the items on the **Contract Item Pricing** tab. If there are a large number of items, you can search for items by clicking **Search Contract Item Pricing**. You can also export items by clicking the **Export** button.

Add PO Clauses to a Contract

PO clauses can be used by an organization to place special verbiage on faxed and emailed purchase orders. PO clauses are also referred to as PO Terms. These represent special conditions the supplier should reference regarding the order. An order may contain none, one, or more PO clauses. Clauses can be set up at the organization-wide level, at the supplier level, fulfillment-center level, or contract level. When a PO clauses are included with contracts, they will display on the purchase order each time a PO is generated from the contract.

This goal of this task is to add PO clauses to a contract. **Note:** This task assumes that PO clauses have been created and are available for selection. For information about creating PO clauses, please see "Setting Up and Assigning PO Clauses".

1. Open the appropriate contract for editing.

2. In the left menu, click **PO Clauses**. The available PO clauses are listed on the page, showing the Clause No. (number), Clause Name and Clause Text.

3. Click the checkbox in the **Assigned** column for each clause you would like to add to the contract.

4. Click **Save Changes**.

Contract Users and Contacts

Contract Ownership, Notification, and Usage

When entering a contract, you must decide which individuals can change or update the contract, which individuals should be notified about important events related to the contract, and who can use the contract for purchase requests.

Who can make changes to a contract?

There are only two ways a user can have full read/write access to a contract:

- They are set up as a **Contract Administrator** (a permission), or

- They are assigned as a **Contract Manager** for the specific contract. **Note:** Assigning the Contract Manager "permission" alone does not automatically grant read/write access to a contract.

If a contract is created through the Contract Director product, some fields of the contract may only be edited through Contract Director.

Who can receive notifications about contract events and important budget information?

Contract Managers and Contract Administrators can receive notifications. In addition, individuals that need to receive notifications pertaining to a contract can be set up as a **Stakeholder** (if they are a JAGGAER user) or as an **External Contact**.

Who Can Use a Contract?

In order to "link" a contract to a purchase requisition or a purchase order, one of the following must be true for the user:

- The contract must be set up so that all users have access to use the contract. (This is the default setting for contracts.)

- The user must be assigned to use a contract (either by department, role, or specific-user assignment).

Important: Contract usage is determined by the information set up on the **Applies To** page of the contract. From here, you determine if all users can use the contract, or limit the usage to specific departments, roles, or individuals (users).

Define Contract Users and Contacts

The purpose of this task is to:

- Determine who has full read/write access to the contract, for example, contract managers.

- Define the users who should be contract stakeholders.

- Define the users who should be contract invoice approvers.

- Determine if there are any external contacts who should be notified of key information pertaining to a contract, and if so, what emails should be sent to these individuals.

The goal of this task is to determine access and visibility for contract managers, stakeholders, and external contracts.

1. Open the appropriate contract for editing.

2. In the left menu, click on **Settings** then **Users and Contacts**.

3. Define **internal users** who can access the contract by clicking **Edit Users** in the appropriate area to add a user. Click the 🗑 icon next to a name to remove a user from selection:

   - **Contract Managers** - Contract managers are internal users who have full control over the contract. You can add multiple users as contract managers. **Note:** Use discretion when assigning contract managers as those users will be able to fully edit the contract as an administrator would. Users who simply need to be able to view the contract and be notified about contract events should be configured as contract stakeholders (see below).

   - **Invoice Approvers** - This option is only displayed if the invoice approver feature is enabled for your organization. Select the **internal users** who are authorized to approve invoices created from the contract and invoice line items assigned to contract. The users selected must have invoice approval permissions, including the ability to search for invoice approvals and view invoices. Contract invoice approvers have the same access to the contract as contract stakeholders.

   - **Stakeholders** - Stakeholders are internal users who can view contract information and receive contract notifications. They will see the contract summary only or have read-only access to the full contract, based on your organization settings. You can add multiple stakeholders.

4. Define the **Visibility Controls** for users who are not contract managers or stakeholders. This setting defines what users who are not contract managers or stakeholders can see on the Contract Summary page. You can configure separate views for users who manage other contracts vs. all other users. You can allow a Full, Partial or Limited view of the contract summary. When you make a selection, click on the **Preview** link to view what will appear to a user with that visibility.

5. Define the **External Contacts**. External contacts are non-JAGGAER users who can receive notifications about the contract. These may be non-JAGGAER users within your organization or contacts outside of your organization, such as supplier contacts. External contacts are shared between all contracts. Meaning, if you create a new external contact, that contact will be available for assignment to other contracts. Take one of the following actions:

- **Edit the external contacts list to add a new contact** - Click the **Edit External Contacts** link. Click the **Create New Contact** button and create the contact. **Note:** Navigate back to the contract before continuing the next step.

- **Add the new contact or another contact from the contact list** - Click the **Add Contacts** button. Locate the appropriate contact and click the **Add to Contract** button. You can add multiple contacts. When you have selected all of the contacts click the **Close** button. To delete a contact click the associated 🗑 icon.

Contract Notifications

Notifications are set up to "alert" or notify contract managers, stakeholders, or external contacts of important events related to a contract, such as start and end dates, or when budget tiers are reached.

Advance Notifications

Advance notifications can be set up for start dates, end dates and renewal dates, so that contract managers or administrators can take action prior to an event occurring. For example, advance notification of an expiring contract could give a contract manager time to prepare a replacement.

Who Receives Contract Notifications

Contract notifications can be sent to internal users or external contacts.

Internal Users

Internal users are designated as **contract managers** or **stakeholders** on the Users and Contacts page of a contract. The type of notifications they receive are chosen on the Notifications page of a contract. Contract managers and stakeholders must enable the corresponding notification preference on their user profile and have access to the contract before they will receive the notifications selected.

External Contacts

External contacts are individuals outside of JAGGAER. They can be added to the Users and Contacts page of a contract, or they may be inherited if they have been connected to a supplier (see "Contract External Contacts" on page 703). The notifications that are sent to external users are chosen by selecting a checkboxes in the External Contacts column of a contract.

If a contract is configured to send emails to external contacts, the selected notifications are automatically sent to the email addresses specified for the contacts. External contacts cannot

opt out of receiving notifications, but you can prevent them from being sent by clearing the appropriate checkbox on the Notification page on individual contracts if they do not need to receive them. You cannot enable or disable notifications for external contacts in general.

Set Contract-Related Notifications

Notifications are set up to "alert" or notify contract managers, stakeholders, or external contacts of important events related to a contract, such as start and end dates, or when budget tiers are reached.

Notifications can be sent to the contract managers, stakeholders, and external contacts defined on the **Users and Contacts** page of a contract. The notifications they receive are chosen on the **Notifications** page of the contract.

Notifications work a little differently for contract managers and stakeholders (internal users), and external contacts:

- **Contract Managers** and **Stakeholders** (internal users) - These users must enable the corresponding notification preference on their user profile (Notification Preferences > Contracts) and have access to the contract before they will receive the notifications selected on this page.

- **External Contacts** - When a contract is configured to send emails to external contacts, the emails are automatically sent to the email addresses specified. External contacts cannot opt out of the notifications, but you can remove them from the list if they no longer need to receive the emails.

1. Open the appropriate contract for editing.

2. In the left menu click **Notifications**.

3. Under the **Notifications** heading, choose the notifications that will be sent to contract managers, stakeholders or external contacts on this contract by selecting checkboxes in appropriate column.

   Notification types include:

   - **Budget Exceeded***(for eProcurement contracts)* - Sent when the overall budget of the contract has been exceeded.

   - **Percentage Tiers***(for eProcurement contracts)* - Sent when a percent value that PR, PO, or Invoice spend represents out of the total contract budget is exceeded. The percentage points at which the notification is sent are configured in the Spend Tier Notification Settings section of this page.

For example, if a **Percentage** notification tier has been configured for invoice spend at 50%, and the contract budget is $1000, this notification is sent when the Invoice Spend amount exceeds $500 (i.e., $500.01).

- **Amount Tiers** *(for eProcurement contracts)* - Sent when a dollar amount of PR, PO, or Invoice spend is exceeded. The dollar amounts at which the notification is sent are configured in the Spend Tier Notification Settings section of this page.

   For example, if an **Amount** notification tier has been configured for PO spend at $25, this notification is sent when the PO Spend amount exceeds $25.00 (i.e., $25.01).

- **Start Date - Advance Notice** - Sends an advance notice to alert users of an upcoming contract start date, based on the schedule set in the Advance Notice Settings section of this page.

- **Start Date Passed** - Sent when the contract start date occurs.

- **End Date - Advance Notices** - Sends an advance notice to alert users of an upcoming contract end date, based on the schedule set in the Advance Notice Settings section of this page.

- **End Date Passed** - Sent when the contract end date occurs.

- **Renewal Date - Advance Notices** - Sends an advance notice to alert users of an upcoming contract renewal date, based on the schedule set in the Advance Notice Settings section of this page.

- **Renewal Date Passed** - Sent when a contract renewal date occurs.

- **Review Date Passed** - Sent when a contract review date occurs.

4. (optional) Configure **Advance Notice Settings** for contract start, end and renewal dates:

- **Start Date** - In the Advance Notice #1 (in Days) column, enter the **number of days** prior to the contract start date that a reminder is sent to users selected on the Start Date - Advance Notice notification.

- **End Date** - Enter the **number of days** prior to the contract end date that reminders are sent to users selected on the End Date - Advance Notices notification. You can enable up to three advance notifications by entering a number in the Advance Notice #1, #2, and #3 columns.

   For example, if you have selected Contract Managers to receive End Date - Advance Notices in step 4, and enter 30, 15, and 1 in the End Date field here, the system will send advance notifications to contract managers 30 days prior to the contract end date, 15 days prior to the end date, and 1 day prior to the end date.

- **Renewal Date** - Enter the **number of days** prior to the contract renewal date that reminders are sent to users selected on the Renewal Date - Advance Notices notification. You can enable up to three advance notifications by entering a number in the Advance Notice #1, #2, and #3 columns.

> **Note:** If you leave a value blank, a notification will not be sent.

5. *(Displayed for Sourcing contracts - optional)* Under **Sourcing Event Advance Notice**, enter the **number of days** prior to the contract end date that the sourcing event advance notification is sent to sourcing event managers. This is a system notification that notifies sourcing event managers that a contract created from a sourcing event is up for renewal or about to expire, and provides an option to re-create the sourcing event by copying the original sourcing event to a new sourcing event.

6. (optional) Under **Spend Tier Notification Settings**, create the spend tiers that define when the Amount and Percentage tier notifications are sent to users:

   a. In the **Send Spend Tier Notification For** field, select the **PR spend**, **PO spend** and/or **Invoice spend** checkboxes to send tier notifications when the amount entered in a tier is exceeded for the type of record(s) specified. If the checkboxes are left blank, no notifications are sent. Contract spend amounts are displayed on the **Budget and Spend** page of the contract.

   b. Add one or more spend notification tiers as follows:

      - Click the **Add Notification Tier** button.

      - Select **Amount** or **Percentage** in the Tier Type field.

      - Complete the **Tier Amount** field as follows:

         - **Amount** - Enter the dollar value of PR, PO or Invoice spend, which, if exceeded, will cause the Amount Tier notification to be sent. The notification is sent when the tier amount is exceeded for the type of record(s) selected in the Send Spend Tier Notification For field.

         - **Percentage** - Enter the percentage point that PR, PO, or Invoice spend represents out of the total contract budget, which, if exceeded, will cause the Percentage Tier notification to be sent. The notification is sent when the tier amount is exceeded for the type of record(s) selected in the Send Spend Tier Notification For field.

      - Enter a note in the **Description** field if needed. These comments will be displayed in email notifications.

      - Repeat to add more tiers. Click the **Remove Tier** button to remove a tier.

7. Click **Save Changes**.

Manage Contract Compliance Tracker Contracts

Overview

The sections below describe tasks related to managing contracts.

Related Permissions

See Contract Compliance Tracker Permissions for information on Contract Compliance Tracking permissions.

Contract Events

There are three primary events in the lifecycle of a contract:

1. When a contract becomes effective,
2. When a contract expires, and
3. When a contract renews (if applicable).

With each of these events, notifications can be sent to the appropriate parties to let them know about the events. Additional notifications can be sent when the contract budget has been exceeded or when certain budget tiers are reached. Notifications can be sent to JAGGAER users (contract administrators, managers, and stakeholders) and external contacts, such as suppliers. Additionally, the Contract Dashboard contains key information about contract notifications such as "all contracts up for renewal in the next 30 days".

Below is a description of each of the three primary events for a contract:

- **Contract Taking Effect** - A contract becomes effective at the date and time set in the **Start Date** field. Once a contract is effective and active, it can be viewed and used by the requisitioners or departments granted access.

- **Contract Expiration** - A contract expires at the time and date set in the **End Date** field.

- **Contract Renewal** - Contracts can be set to renew automatically, or they can be renewed manually. When you set up a contract to renew automatically, you set an auto-renewal period in days, months, or years, as well as the number of times the contract should auto-renew. For example, a contract might be set to auto-renew every six months, up to three times. Each time a contract renews, the application captures information about the

renewal. This information can be viewed from the **Contract Family** section of the contract. **Note:** No contract renewal e-mail notifications are available for contracts that are renewed manually rather than automatically.

Note: If the contract originated in the Contract Director product, the start/end dates and renewal options can only be edited in Contract Director.

Contract Copy

You can copy an existing contract to create a new contract. This is recommended when you need to create a contract with similar details to a contract that is already configured. Settings from the original contract are copied to the new contract, saving you the time required to re-enter data.

When a contract is copied, a new contract is created in Draft mode with contract number, name and type as entered in the Copy Contract window, and all other information copied from the original contract:

- The start and end dates will carry over from the source contract, but you can change the dates on the new contract.

- The contract manager and stakeholders will carry over from the source contract.

- The "Active for Shopping" setting will carry over to the copied contract (as soon as the contract become effective).

> **Important Note**: Double-check your updates to the copied contract before saving. Some fields, including **Contract Number** and **Supplier Name**, cannot be changed after saving a contract.

You must have the **Contract Manager** permission enabled in order to copy a contract.

1. Open the contract you want to copy by navigating to **Contracts ▣ > Contracts** and selecting **Search Contracts** (or **Contracts Home** if you have the appropriate permissions).

2. In the top-right corner of the contract page, click **Contract Actions**, then **Copy**. The Copy Contract window opens.

3. Complete these fields in the **Copy Contract** window. Field names with a star (★) are required:

   - **Contract Number**_(if displayed)_ - Select the **Use Number Wheel** radio button to have the system automatically assign a contract number to the contract. Select the **Enter Contract Number** radio button to manually enter a contract number and type a number in the field provided.

> **Note:** This field is displayed if system settings allow contract numbers to be edited. It is not displayed if system settings do not allow contract numbers to be edited.

- **Contract Name** - Enter a name for the new contract. "Copy of *[source contract name]*" is displayed by default. It can be changed on the new contract.

- **Supplier Name** - Click the **Select Supplier** button, then search for and select one or more suppliers for the contract.

- **Time Zone** - Enter the time zone used by the contract. The time zone from the source contract is displayed by default. It can be changed on the new contract.

- **Start Date** - Enter a start date for the contract. The start date from the source contract is displayed by default. It can be changed on the new contract.

- **End Date** - Enter an end date for contract. The end date from the source contract is displayed by default. It can be changed on the new contract.

4. Click the **Copy** button. A new contract is created and placed in draft mode.

Contract Family

The Contract Family screen displays a list of a contract's amendments and renewals.

Clicking the info icon ⓘ next to a record opens the Contract Summary. From there, users with the appropriate permission can open the related contract by clicking Go to Contract.

View a Contract Family

1. Navigate to **Contracts 🖼 > Contracts > Search Contracts** (or **Contracts Home** if you have the appropriate permissions).

2. Search for and open the **contract** with the contract family you want to view.

3. In the left menu, select **Contract Family**. The Contract Family screen opens, showing a list of contract amendments and renewals.

4. (optional) Click the info icon ⓘ next to a record to open its Contract Summary. From there, users with the appropriate permissions can open the related contract by clicking Go to Contract.

Review Contract Spend

For organizations using eProcurement, the **Budget and Spend** page is used during the lifetime of the contract to review all contract spend information for all versions of the contract, as well as make adjustments to spend totals, access related records, or open a different version of the contract.

In addition to information available in the Budget and Spend page, Lifetime Spend totals show contract spend over the lifetime of the contract.

1. Navigate to **Contracts** 🔳 **> Contracts > Search Contracts** (or **Contracts Home** if you have the appropriate permissions).

2. Search for and open the appropriate contract for editing.

3. In the left menu, select **Budget and Spend**.

4. The **Budget Summary** and **Lifetime Summary** charts show spend totals for the open contract. In the Budget Summary chart, click a value in the Remaining column to view details of the calculation. In the Lifetime Summary chart, you can toggle the renewal versions listed in the legend on and off so that the bar graph only shows data for the selected version(s).

5. In the **Actual Spend by Version** section, spend information for each contract version is displayed and you can perform the following tasks:

   - **Open related purchase requisitions, orders, and invoices** - Click a PR Spend, PO Spend or Invoice Spend **value** to open a Document Search page where all records related to that value are listed. For example, clicking a PR Spend total will direct you to a Document Search page that lists all the purchase requisitions with line items assigned to the contract version.

   - **Adjust PR, PO or Invoice Spend**- Adjusting the amount allows you to account for purchases made outside of the system or made prior to the entry of the contract. Click the Adjust button in the appropriate row. Enter the amount to add to or subtract from the **existing value**. Add a note and save changes.

   - **Switch contract versions** - Click the information icon ⓘ next to a contract version to open its Contract Summary page. From there, clicking **Go to Contract** will refresh the page and open that version of the contract. The This Version indicator moves to the row of the newly opened contract. The values displayed in the Lifetime Spend table in the top left corner of the page do not change as they are calculated for all versions of the contract.

6. *(Consortium members only)* The **Published Member Spend** section contains the same type of information as the Actual Spend by Version table, but the data is specific to consortium members. An additional **Published Members** column shows the total number of members to which the contract is published. Clicking the hyperlink in this column will provide

breakdown of spend per consortium member.

> **Note:** You cannot use the 🛈 icon to change contract versions or click on a value to view open related documents in the Published Member Spend table.

7. Exporting the Contract Reports - Click the **export** link to the right of a report name to export the report.

Adjust Contract Spend

You can adjust PR Spend, PO Spend and Invoice Spend levels on a contract. Adjusting these amounts allows you to account for purchases made outside of the system or made prior to the entry of the contract. Adjustments affect the contract only, it does not change amounts on the associated requisitions, purchase orders or invoices.

Keep in mind that the totals for these documents may not match the total spend because you may have only certain line items associated with a contract.

1. Navigate to **Contracts** ⬛ **> Contracts > Search Contracts** (or **Contracts Home** if you have the appropriate permissions).

2. Search for and open the appropriate contract for editing.

3. In the left menu, select **Budget and Spend**.

4. In the **Actual Spend by Version** section, click **Adjust** on the row of the contract version you want to adjust.

5. Select the **Adjustment Type** (Requisitions, Purchase Orders or Invoices).

6. Enter an amount to add to or subtract from the **existing value**. For example, if the current amount is $10.00 and you enter 1 in this field, the value will change to $11.00. If the current amount is $10.00 and you enter -1, the value will change to $9.00.

7. Add a **note** for later reference.

8. Click **Save Changes**.

Create a Non-PO Invoice from a Contract

Organizations using eProcurement can create invoices for contracts without a purchase order. This is useful for managing payments and reducing invoice entry time in situations where the contract itself is considered the purchase order and invoices are submitted against it. You can create a non-PO invoice directly from a contract and choose which non-catalog items from the contract will be added to the invoice.

On contracts, the **Create Invoice** process can be initiated from three places:

- The **Contract Search** results
- The **Contract Actions** menu
- The **Contract Summary**

When the Create Invoice option is selected, a **Create Invoice** window opens and displays information from the contract. This is where users decide which non-catalog items are added to the invoice by modifying the quantity for a line item. All items with a quantity greater than 0 will be added to the invoice. Line items with a quantity of 0 will not be added to the invoice. Non-catalog items can also be added in this window. Clicking the **Add Additional Lines to Invoice** link opens a table where users can enter non-catalog items that they want to be on the invoice when it is created, but they are not currently listed on the contract. Non-catalog items entered in the table are added to the invoice and assigned to the selected contract, but they are **not** added to the contract.

Once the invoice is created, the **History** tab on the invoice indicates that the invoice was created from a contract. If the invoice is still in Draft mode, the **Add lines from Contract** button on the invoice can be used to add non-catalog items from a contract to the invoice.

On **consortium contracts**, if a consortium parent has the CCT license, and a consortium member does not, the member is allowed to create invoices from shared contracts.

The following elements must be in place to create a non-PO invoice from a contract:

- The contract must have a **supplier** or **second party** that is active for shopping and is permitted to create non-PO invoices.

- The invoice date must fall within the start and end dates on the contract. If there is no invoice date, the current date (i.e., today's date) is used.

- The **Create Non-PO Invoice/Credit Memo** (Permissions > Accounts Payable > Accounts Payable) permission is required to perform this task. You also must be able to access the contract.

1. Navigate to **Contracts** ⛭ **> Contracts > Search Contracts** (or **Contracts Home** if you have the appropriate permissions).

2. Search for the contract you want to create an invoice for and open the **Create Invoice** window with one of the following options:

    - **Contract Search** - In contract search results, find the contract you want to create an invoice for and select **Open Summary** then **Create Invoice**.

    - **Contract Actions** - Open a contract. Expand the **Contract Actions** menu in the top

right corner of the page and select **Create Invoice**.

- **Contract Summary** - On the Contract Summary page, click the **Create Invoice** button near the top line of the page.

The Create Invoice window opens, showing information from the contract header and line items populated from the contract.

> **Note:** The list of non-catalog items is populated from items in the Product Items or Service Items pages of the contract that have been **copied to shopping***plus* items listed the Non-Catalog Items > Manage Non-Catalog Items tab on the Goods and Services page.

3. (optional) Enter a value in the **Invoice Number** field. This is the number on the invoice submitted by the contract party or supplier.

4. (optional) Enter a value in the **Invoice Date** field. This is the date on the invoice submitted by the contract party or supplier.

5. (optional) If the contract allows evaluated receipt settlements, select the **Invoice for Goods or Services received** checkbox to indicate that the invoice is being created for goods or services already received. This will flag the invoice source as Evaluated Receipt Settlement.

> **Note:** This checkbox is only displayed if: ERS is enabled for your organization, the Evaluated Receipt Settlement checkbox is set to Yes on the contract eProcurement Setup page, and the second party or supplier on the contract belongs to the Evaluated Receiving Settlement class, indicating that an agreement is in place with the second party or supplier to invoice for goods or services already received.

6. For **each line item** that you are adding to the invoice complete the following fields:

- **Quantity** - Enter a number greater than 0 to add the item to the invoice. Leave the Quantity field at **0** if you do not want to add the line item to the invoice. **Only line items with a quantity greater than 0 will be added to the invoice**.

- **Unit Price** - Prices are populated from the item on the contract but you can change them here if needed.

7. (optional) Click the **Add Additional Lines to Invoice** link to add non-catalog items to the invoice from this overlay. Enter the Part No., Description, Product Size, Quantity, Unit Price, and Packaging information, then click **+ Add Item**. Repeat to add more items.

> **Note:** Non-catalog items entered in the table are added to the invoice and assigned to the selected contract, but they are not added to the contract.

> **Note:** There is a maximum limit of contract non-catalog items that can be added to an invoice at one time. Once the limit is reached, a warning message will appear and you have three options: create the invoice with the existing number of items (and add more items later), remove additional items that have been added, or reduce the quantity on existing contract items to 0, which means they will not be added to the invoice.

8. Click **Create**. The invoice is created based on contract data and you are directed to the Detailed Manual Entry tab of the invoice where you can continue to process the invoice. The contract party/supplier information on the invoice is populated from the primary second party/supplier on the contract.

9. Complete invoice information as follows:

   - Enter any required or header information for the invoice (payment method, etc.).

   - Review the Codes section of the invoice, and make appropriate changes. If you have Invoice Code Favorites set on your user profile, you can select from the configured list.

   - When finished with all edits, select **Save**.

10. When all changes have been made, click the **Complete** button at the top of the invoice screen. The invoice is processed and spend information on the contract is updated.

> **Note:** Depending on your system settings, it may take up to 24 hours for the Lifetime Spend and Actual Spend totals on the contract to reflect the new invoice amounts.

Contract Lifetime Spend

For organizations using eProcurement, the **Lifetime Spend** link on contracts shows a summary of contract spend calculated for all versions of the contract. Contract administrators and contract managers can quickly view contract spend totals and make decisions about future spending without navigating away from the contract.

Click **Lifetime Spend** in the top left corner of a contract (i.e., the "sticker" section) to display a summary of all spend assigned to the contract from purchase requisitions, purchase orders, and invoices:

- PR, PO and Invoice spend totals are calculated for **all versions** of the contract, including renewals.

- Totals include both **committed and actual spend** for all contract statuses.

- Totals incorporate any **adjustments** made in the Actual Spend by Version table on the Budget and Spend page.

- Lifetime Spend totals are updated on all contract versions, so the amounts displayed remain constant no matter which version is open. For example, if the original contract has $100 in invoice spend, and a renewal adds $50, the Lifetime Spend **Invoice:** total will show $150 on the original contract and all renewals.

- Click the **Details...** link to open the **Actual Spend by Version** table on the Budget and Spend page of the contract, where you can view a complete breakdown of spend totals by contract version.

Lifetime spend totals are also displayed in the **Lifetime Summary** bar chart on the Budget and Spend page. You can toggle the renewal and amendment versions listed in the legend on and off so that the bar graph only shows data for the selected version(s).

Depending on your system settings, it may take up to 24 hours for the Lifetime Spend and Actual Spend by Version totals to reflect new PR, PO and Invoice Spend amounts assigned to the contract.

Consortium Contracts

Organizations with consortium contracts will see two links:

- The **Lifetime Spend** link shows contract spend totals specific to your organization.

- The **Lifetime Member Spend** link shows spend totals for all member organizations:

  - For **parent organizations**, this means the totals will be the sum of all spend assigned to the contract by all subscribers and will show the total contract spend by all consortium members.

  - For **member organizations**, this means the totals will only show a summary of spend by organizations that you have published the contract to.

- For consortium contracts, clicking the **Details...** link will open the **Published Member Spend** table on the Budget and Spend page, which displays information specific to consortium members. See **Review Contract Spend** above for more information.

View Lifetime Spend

1. Navigate to **Contracts** ⊞ **> Contracts > Search Contracts** (or **Contracts Home** if you have the appropriate permissions).

2. Search for and open the appropriate contract.

3. Click **Lifetime Spend** in the top left corner of a contract (i.e., the "sticker" section) to display a summary of all spend assigned to the contract from purchase requisitions, purchase orders, and invoices.

4. *(Consortium members only)* Click **Lifetime Member Spend** to view spend totals for member organizations. For parent organizations, the totals show the total contract spend by all consortium members. For member organizations, totals only show spend for the organizations that you have published the contract to.

5. (optional) Click the **Details...** link to open the **Actual Spend by Version** table on the Budget and Spend page of the contract to view a breakdown of spend totals by contract version. Consortium parents and members will also see a **Published Member Spend** table that contains information specific to consortium members.

Contract Import/Export Results

Overview

For contract administrators and contract managers, the **View Contract Import/Export Results** page provides a central location that is used to view contract import and export results and import or export contract data. The options available to you will depend on system settings and your user permissions.

Related Permissions

See Contract Compliance Tracker Permissions for information on Contract Compliance Tracking permissions.

About Contract Imports and Exports

Contract imports and exports can be used to create or update contract data by importing and exporting files in XLS (Excel) or CSV formats.

The general method of importing and exporting data is similar throughout the system, but each type of import/export has different fields that are used.

Detailed instruction guides for each type of import/export can be downloaded from their import/export pages in the application.

These types of contract imports and exports are available from the **View Contract Import/Export Results** page and as indicated:

- The **Contract CSV Import/Export** import/export action is used to create contracts and update contract data through the import and export of CSV files. This feature is especially helpful if you are moving contracts from another system into JAGGAER. This feature can also be accessed by navigating to Contracts > Contracts > Contract Import/Export.

- The **Contract Codes CSV Import/Export** import/export action is used to import and export default account codes on contracts, also referred to as contract account codes.

- The **Run Contract Non-Catalog Items Import/Export** import/export action is used to create and update contract non-catalog items via import and export. This feature can also be accessed from an eProcurement contract by clicking Goods and Services in the left menu, selecting the Non-Catalog Items tab, then the View Import/Export Results tab.

- The **View XML Import Status/Results** import/export action is available for contract administrators to view Org Catalog import results.

View Contract Import/Export Results

On the main page, you can search for a list of contract downloads that have been performed and view their results. The types of data that can be viewed include search results, downloaded reports, import/exports and error/warning results for imports and exports. Search filters allow you to search for contract downloads by type, function and status. A Show Company Requests option allows you to view all requests submitted by users within your organization, or only your own requests.

Search for Contract Import/Export Results

The types of downloads you can access will depend on your system settings and user permissions. By default files are retained for six days, but this may vary depending on your organization's settings.

One of the following permissions are needed to perform this task: **Contract Administrator**, **Contract Manager**, **Contract Super User**, or **Export Search Results**.

1. Navigate to **Contracts** ⊞ **> Contracts > View Import/Export Results**.

2. To limit the import or export requests that are displayed, complete these search filter fields, then click **Apply**:

   - **Type** - Select the type of import/export requests to search for from the drop down list. You can search for the following types of contract import/export requests:
     - Clause By Contract (contract report)
     - Clause By Template (contract report)
     - Contract Alerts
     - Contract Codes CSV Export
     - Contract Codes CSV Import
     - Contract CSV Export
     - Contract CSV Import
     - Contract Cycle Time Export (contract report)
     - Contract Parties Export
     - Contract Parties Import
     - Contract Workload Export (contract report)
     - Contracts XML Import
     - Expiring Contracts
     - Expiration Renewal Review
     - Full Contract as PDF (contract documents)
     - Non-Catalog Items
     - Search Results CSV Export
     - Search Results Excel Export
     - Template By Contract (contract report)

   - **Function** - Filter the search results based on the operation performed by the import or export request, such as Import, Export, or Validate. The options in this field will vary based on what is selected in the Type field and there may be only one option that can be selected.

   - **Status** - Select the status of the imports or exports you want to filter for, such as Completed or Pending.

   - **Show Company Requests** - Select **Yes** to include all import, export or validation requests submitted by users within your organization, or select **No** to view only your own requests.

   A list of downloaded or uploaded files that match the search criteria is displayed.

3. To see the latest status of the last five (5) requests submitted, click **Refresh**. If the submitted request is not visible, view all submitted requests by clicking the "**Click here for additional requests...**" link.

4. To view the output file for a completed request, click the **file name** or the "**Click to download...**" link so the file can be viewed or saved.

Import/Export Actions

Import/Export Actions is used to create or update contract data through imports and exports. Detailed instruction guides can be downloaded from the import/export pages. These types of import/export actions are available:

- **Contract CSV Import/Export** - Used to create and update contract data via export and import of CSV files. This feature can also be accessed by navigating to Contracts > Contracts > Contract Import/Export.

- **Contract Codes CSV Import/Export** - Used to import and export default account codes on contracts, also referred to as contract account codes.

- **Run Contract Non-Catalog Items Import/Export** - Used to create and update contract non-catalog items via import and export. This feature can also be accessed from an eProcurement contract by clicking Goods and Services in the left menu, selecting the Non-Catalog Items tab, then the View Import/Export Results tab.

- **View XML Import Status/Results** - Available for contract administrators to view Org Catalog import results.

Open Import/Export Actions

The following import/export options are available on the View Contract Import/Export Results page. Detailed instruction guides can be downloaded from the import/export pages.

One of the following permissions are needed to perform this task: **Contract Administrator**, **Contract Manager**, **Contract Super User**, or **Export Search Results**.

1. Navigate to **Contracts 🜨 > Contracts > View Import/Export Results**.

2. Click **Import/Export Actions** and select the type of import or export you want to perform from the drop down list.

3. Click the **Detailed Contract Import Instructions** link to download an instruction guide for importing, exporting and validating contract data.

JAGGAER ONE Cross-Module Integrations Contracts Managed in Sourcing+

Overview

JAGGAER ONE Cross-Module Integrations customers who have enabled the **Enabling Contracts for eProcurement** process flow can generate and manage contracts within JAGGAER Advantage (JA) that are associated with a specific Sourcing+ RFQ.

Related Permissions

See Contract Compliance Tracker Permissions for information on Contract Compliance Tracking permissions.

Contracts Managed in Sourcing+

JAGGAER ONE Cross-Module Integrations customers who have enabled the **Enabling Contracts for eProcurement** process flow can generate and manage contracts within JAGGAER Advantage (JA) that are associated with a specific Sourcing+ RFQ. Such contracts can be enabled for eProcurement in JAGGAER Indirect (JI) in order to leverage the item information for shopping and invoicing. When a contract is enabled for eProcurement, the following information is synced to JI:

- **Core contract header data:** Contract reference code, title, description, currency, buyer/supplier.

- **Core contract line item data for price items:** Item code, item description, UOM, goods group, notes and specific additional columns.

For information about creating a contract in the JA, see the "Creating Contract Documents" in the online searchable help or the **Contracts Handbook** (JA).

Once the contract has been enabled for eProcurement, the user is navigated to the **Non-Catalog Items** page.
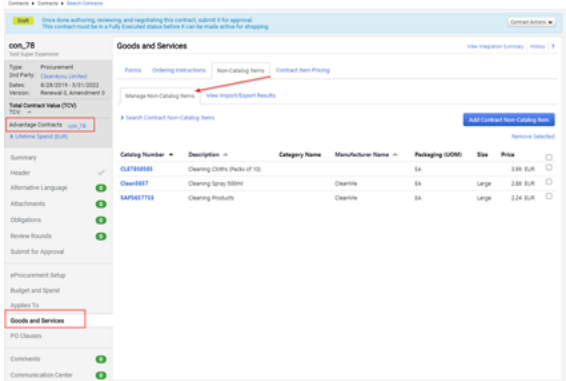
> **Note**: Basic contract information is managed in the JA Contract view and should not be edited in the eProcurement solution.

You can enhance item information and edit other eProcurement settings as follows:

- **eProcurement Setup** – Configure general settings related to using the products in the Procurement solution. See "eProcurement Setup" on page 651 for additional information.

- **Budget and Spend** – Enter the appropriate information related to any budget and spend parameters associated with the contract. See "Contract Budget and Spend" on page 657 for more information

- **Applies To** – The item visibility is determined by who is granted access via the Grant Access to this Contract using Departments and Roles setting. See "Configure Contract Applicability for Users, Products and Supplier Fulfillment Centers" on page 664 for additional information.

- **Goods and Services (non-catalog items)** – Manage item information associated with the contract. See "Configure Contract Goods and Services (Forms, Non-Catalog and Other Items)" on page 667 for additional information. **Note**: New items should be created in the JA contract, and synchronized to eProcurement. If items are removed from the contract, they must also be removed from the eProcurement contract view.

- **PO Clauses** - Add clauses related to the purchasing of contract items. See "Add PO Clauses to a Contract" on page 671 for additional information.

Contract Item Visibility in Search Results

End users will see items in search results based on the item visibility settings and user permissions. See "Contract Items and Forms in Product Search" on page 156 for additional information.
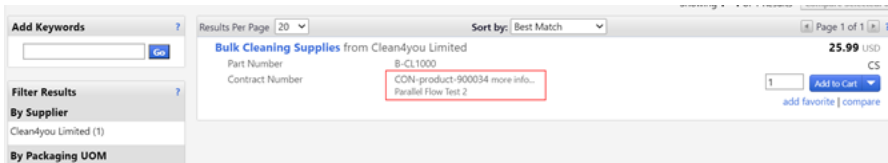
Clicking on the Contract number will show end-users a **Summary of Contract** overlay with the main contract data. Users with the appropriate permissions can navigate to the contract in JA by clicking the **Go to Contract** button.
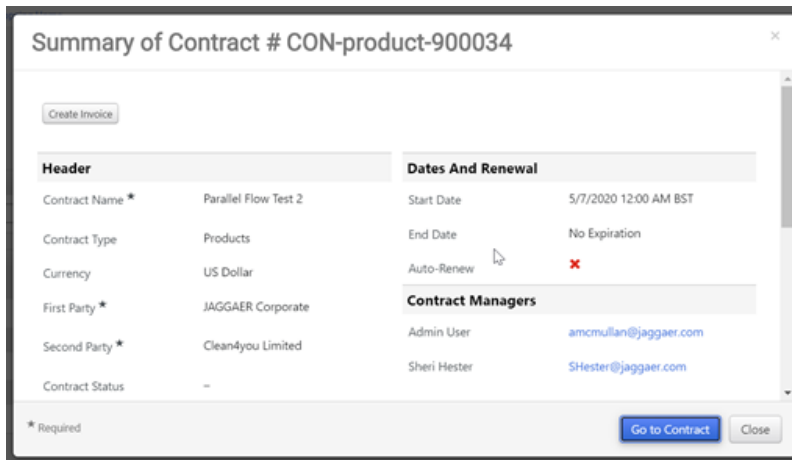
New Non-Catalog Items Added in Requisition Process

The contract can be linked to non-catalog item lines added during the requisition process. See "Non-Catalog Items" on page 152 and " Contract Items" on page 155 for additional information and instructions.

> **Note**: Associating the contract with an item during the shopping process **does NOT** add the item to the actual contract. If the item should be included with the contract, refer to Sourcing+ (JA) Contract Updates and Expiration below.

Sourcing+ (JA) Contract Updates and Expiration

In the case of a Sourcing+ Contract update, any new items will be added and existing items will be updated (based on the unique Contract Item ID) in the eProcurement contract settings. The removal of items from a Sourcing+ Contract is NOT SYNCED to the eProcurement contract settings. Therefore, items must be manually removed from the eProcurement contract **Goods**

and Services page using the "Remove Selected" items feature in JI. See "Configure Contract Goods and Services (Forms, Non-Catalog and Other Items)" on page 667 for additional information about removing items from the eProcurement contract.

In the case of Contract expiration, the eProcurement contract will expire as long as the contract has been synced to include the same expiry date used in the Sourcing+ contract. If the Sourcing+ contract is terminated, the eProcurement contract will be terminated upon synchronization.

Administration and Setup Tasks

Contract Administration Settings

Overview

The **Contract Compliance Tracking** component of JAGGAER ONE is used to track procurement spend against contracts. It integrates supplier contracts into the purchasing process, including contract rules and restrictions, buying instructions and behind-the-scene price validations.

The sections describe tasks contain information on settings under the **Contract Administration** menu.

Related Permissions

See Contract Compliance Tracker Permissions for information on Contract Compliance Tracking permissions.

General Contract Settings

The General Contract Settings page is used to define default contract settings for your organization. In Contract Compliance Tracking, it is used to designate a custom field that can be made visible to suppliers when they create invoices from a contract.

Organizations can choose one custom field that is displayed on the **eProcurement Setup** page for all contracts. On each contract, contract managers can choose to make the field visible to suppliers and also make it mandatory that suppliers complete the field before they can submit an invoice.

> **Note:** This page is only available for organizations with both the Contract Compliance Tracking and Invoicing solutions.

1. Navigate to **Contracts ⚙ > Contract Administration > General Contract Settings**.

2. Click the **General** tab and complete options as follows:

   - **Supplier Visible Custom Field** - This section is used to designate a custom field that can be made visible to suppliers when they create invoices from a contract. Organizations can choose one custom field here that is displayed on the **eProcurement Setup** page by default for all contracts. On each contract, contract managers can choose to make the field visible to suppliers and also make it mandatory that suppliers complete the field before they can submit an invoice. Suppliers creating a non-PO invoice from a contract with the setting enabled will be able to view the field on invoice line items and enter a value.

     - **Select the Custom Field the Supplier will provide if the contract setting is enabled** - Use the type ahead or click the search icon to select an **organization custom field** that can be made visible to suppliers when they create invoices from a contract. The custom fields available for selection are populated from line-level custom fields on your organization's active buyer invoice configuration document and are unique for each organization. The field selected is displayed on the eProcurement Setup page for all contracts. Contract managers can choose to make the field visible on individual contracts.

       > **Important Note:** *All* values that can be selected in the custom field are visible to suppliers on contracts designated to be exposed.

   - **Non-Catalog Items**

     - **Enforce Contracted Quantity Limit** - Select the checkbox to enforce a total quantity limit for a contract non-catalog item. If the checkbox is selected, users cannot order more than the Contracted Quantity of a contract non-catalog item throughout the eProcurement process.

Supplier Visible Custom Fields

Organizations can designate a custom field that can be made visible to suppliers when they create invoices from a contract.

Organizations choose one custom field that is displayed on the **eProcurement Setup** page for all contracts. On each contract, contract managers can choose to make the field visible to suppliers and also make it mandatory that suppliers complete the field before they can submit an invoice. If adding a contract non-catalog item to the contract, contract managers can select a default value for the custom field that suppliers can change.

Contract Administration Setup

Contract administrators choose an organization custom field to display in the **General Contract Settings** page under **Contract Administration**. The custom field selected is displayed on all contracts in the system by default.

The custom fields available for selection are **line-level** custom fields (that are not child custom fields) populated from the organization's active buyer invoice configuration document and are unique for each organization.

> **Important Note:** *All* values that can be selected for the custom field are visible to suppliers on the contracts designated to be exposed.

Contract Setup

The **Supplier Visible Custom Field** section on the contract **eProcurement Setup** page is where contract managers choose to make the custom field visible to suppliers for individual contracts, and also indicate whether suppliers are required to complete the field before submitting an invoice.

Consortiums

Parents and members of a consortium can choose their own supplier custom visible fields.

Suppliers Creating Invoices from a Portal

If a custom field has been made visible for suppliers on a contract, suppliers creating a non-PO invoice from the contract in a network or branded portal will be able to view the field on invoice line items and select a value:

- The custom field from the contract is displayed under **Line Item Details** on the second line of the row selected:
    - It is displayed as a **drop down** field if there are fewer than 25 values to select. *All* values that can be selected for the custom field are visible to suppliers on the contracts designated to be exposed.
    - It is displayed as a **text box** if there are more than 25 values to select. Suppliers enter a code and the supplier-entered values will be validated against organization codes. A message will be displayed if the code is not valid.
- Suppliers can copy lines with the field on an invoice and select a different value for the field on each line. They can copy a single line by clicking **Actions > Copy Line** or select **Actions for Selected Items** to copy multiple lines at once.

Buyer Invoices

Custom field values entered by a supplier on supplier invoices will be transferred to **buyer invoices** created from the supplier invoice, where the system rules for applying account codes to invoices are applied.

CSV and XML Import/Exports

The following columns in the Contract CSV and XML import/export files allow the Supplier Visible Custom Field settings on contracts to be updated via import:

- **CustomFieldEnabled** - Indicates whether or not the Supplier Visible Custom Field enabled for an organization is visible to suppliers when they are creating invoices for a specific contract. It corresponds to the **Do you want portal invoicing enabled Suppliers to complete the selected Custom Field on Invoices created from this contract?** field on the contract eProcurement Setup page.

- **CustomFieldRequired** - Indicates whether or not suppliers are required to complete the custom field before submitting an invoice created from the contract. The **CustomFieldEnabled** field must be set to **Yes** before a value can be entered.

Contract Types

Contract types are categories used to group similar types of contracts and configure some basic settings for contracts belonging to them. CCT contract types are used to enable basic eProcurement settings for contracts using the contract type.

Managing Contract Types

Contract types are initially created as part of your implementation, but you may need to update or add contract types.

- When **updating** a contract type, changes to fields in the About and Procurement tabs on a contract type will immediately affect all contracts using the contract type. Changes to fields in the Custom Data and Users tabs will only affect new contracts created from the contract type.

- If **creating** a contract type, once the contract type is saved, it cannot be deleted. It must be activated to make it available for selection when creating contracts, and can be inactivated to make it unavailable for selection. Inactive contract types can be reactivated.

- A **Show Inactive/Hide Inactive** toggle link in the top right corner of the Contract Types column on the Contract Types page displays or hides inactive contract types. An inactive parent contract type is displayed if any of its child contract types are active.

Overview

Here is a summary of how contract types work:

- Contract types are created and activated.

- **Every contract must be associated with an active contract type when it is created.** Contracts types can be changed while a contract is in Draft status, but are locked once the contract is approved.

- Contracts can only be used with other records that have the same contract type or records that can be used with all contract types. For example, contracts belonging to a contract type A will only be able to use templates that also belong to contract type A.

- Contract types affect contract searches and reports as they can be used to filter records based on their contract type.

Contract Type Tabs

The settings on these tabs will be inherited by all contracts associated with the contract type.

- **About** - The About tab is used to configure basic default settings for a contract type. This is where to define basic information, such as the contract type name, contract type code (for the initial creation), and whether it is active.

- **Procurement** - The Procurement tab is used to select the default form used for eProcurement items on a contract, and whether non-catalog items from a contract are displayed when users browse contracts for items.

Create a Contract Type in Contract Compliance Tracking

Contract types are categories used to group similar types of contracts. They will initially be created as part of your implementation. Contract administrators have the ability to modify and add new types.

The **Contract Administrator** permission is needed to perform this task.

1. Navigate to **Contracts** ⬚ **> Contract Administration > Contract Types**. The Contract Types screen displays.

2. The list of existing contract types displays on the left. To view details about a specific contract type, click on the contract type name to display the information.

3. To create a new contract type, click the **Create New** link (located to the left of the main **Contract Types** title). A dialog box will display.

4. Configure the contract type fields):

   - **Name** - Enter the display name for the contract type.

   - **Internal Name** - Enter the internal reference name for the contract type. This may be the same as the Name. Internal name is typically used for workflow routing and cannot be changed once the contract type is saved.

   - **Contract Type Code** - Enter a reference code for the contract type. This code should be a 3 - 7 character abbreviation for the contract type.

   - **Active** - By default, the contract type will be set to active, making it available to select when creating contracts. To inactivate the contract type, select the **No** radio button.

   - **Show Total Contract Value** - Click **Yes** to enable for the contract type. When enabled, users can enter a dollar value on the contract header of their contracts. The Total Contract Value is calculated based on the value of the original contract and each amendment and renewal.

5. Click the **Save** button to save the contract type.

6. The contract type will be saved and you will be able to configure additional options:

   - **About** tab - By default, the contract type will be set to active, making it accessible when configuring contracts. To deactivate the contract type, select the **No** radio button.

   - **Procurement** tab- On this tab you can select a default form for contracts with the contract type. If you select a default form, that form will be used by default whenever purchases are made against contracts with the contract type. If you would like to allow non-catalog items to display when browsing contracts with the contract type, click the **Yes** radio button in the **Display Non-Catalog Item in**

Browse Contracts field.

Click **change...** to choose a different form. Active forms that can be selected for the contract type are displayed in the **Description** column. Click **Preview** to view a form. Click **Select** to choose the default form used for purchases against contracts with the contract type.

7. Click **Save Changes** to save updates made to the **About** or **Procurement** tabs.

Add or Edit a Contract Number Wheel

Number wheels allow organizations to automatically assign contract numbers to contracts using a standard numbering format.

In **Contract Compliance Tracking**, you can set up a single number wheel that defines the numbering format that will be used for all contracts. Once it is saved, the number wheel format is automatically applied to all contracts going forward. Once a number wheel is created, it can be edited, but it cannot be deleted.

1. Navigate to **Contracts** ⬚ **> Contract Administration > Manage Contract Number Wheel**.

2. Choose one of the following options:

   - Click the **Add Contract Number Wheel** button to create a new contract number wheel.

   - Click **Edit** next to an existing contract number wheel to modify its settings.

3. Complete the contract number fields as indicated. You can view an example of the contract number wheel format in the **Preview Contract Number** section.

   - **Name** - Enter a name for the number wheel. This is how you will reference the number wheel.

   - **Prefix** - This is an optional field that allows you to add an alphanumeric identifier to the beginning of each number assigned. For example **CON**- might come before each sequential number assigned. You have the option to automatically include the fiscal year or contract type code by selecting that value from the drop down.

   - **Pad Number with Leading Zeros?** - Click the **Yes** radio button to ensure the same number of characters for all contracts created. If this option is enabled, all extra "spaces" will be filled with a 0. If this option is enabled, you must also determine the maximum number of 0's to populate in the **Number of Digits** field.

   - **Number of Digits** - If the **Pad Number with Leading Zeros?** radio button is set to **Yes**, enter the maximum number of 0's that can be used to fill extra spaces in front of a contract number so that all contract numbers are the same length.

- **Starting Number** - Enter the first number in the contract numbering sequence.

- **Suffix** - This is an optional field that allows you to add an alphanumeric identifier to the end of each number assigned. Suffixes are set up in the same way as prefixes.

4. Click **Save Changes** to save the number wheel. **Important Note:** The number wheel cannot be deleted once it is saved. If you are editing the number wheel, the saved format is applied to all contracts going forward.

Configure Contract Summary Screen

The **Contract Summary** screen provides a single location from which a user can view and access important contract information. The Summary screen "rolls up" information that is normally accessible from other areas in the contract. An administrator can configure which fields are displayed on the Contract Summary screen. Further, the fields on the screen can be configured to display (or not display) based on a user's **Visibility** setting within a specific contract. The contract summary settings are configured in a single location and apply to each contract in the application.

1. Navigate to **Contracts** ⚙ **> Contract Administration> Configure Contract Summary Screen**. The configuration page displays.

2. The fields are grouped in to sections. Click the checkboxes for the fields you would like to display based on the user's visibility in to the contract. A description of each option is below. For additional information about setting visibility controls for a contract, see .

   - **Admin/Manager** - Select this option to display the field to a Contract Administrator or Contract Manager for a contract.

   - **Full** - Select this option to display the field to a user who has been assigned the **Full** visibility option for a contract.

   - **Partial** - Select this option to display the field to a user who has been assigned the **Partial** visibility option for a contract.

   - **Limited** - Select this option to display the field to a user who has been assigned the **Partial** visibility option for a contract.

3. You can preview how the summary screen will display for each visibility type. In the top-right corner of the screen, a **Preview** button is available for each type. From the drop-down menu, select a contract then click the appropriate preview button. The Contract Summary screen will display as it would to a user with that visibility.

4. You can restore the original settings BEFORE you save the changes by clicking the **Undo Changes** button. To save the changes, click the **Save** button.

Contract Compliance Tracker Setup Tasks

Overview

The **Contract Compliance Tracking** component of JAGGAER ONE is used to track procurement spend against contracts. It integrates supplier contracts into the purchasing process, including contract rules and restrictions, buying instructions and behind-the-scene price validations.

The sections below describe various setup tasks for Contract Compliance Tracker.

Related Permissions

See Contract Compliance Tracker Permissions for information on Contract Compliance Tracking permissions.

Enabling Contract Flex Fields

Contract flex fields will be created initially during implementation, however contract administrators who also have field management permissions are able to update or hide contract flex fields.

Administrative permissions are needed to complete this task.

1. Navigate to **Setup** ⚙ **> Field Management > Manage Field Names and Help Text**. The **Field Management** screen will display.

2. Through the tree, browse to **Administration > Contracts > Details**.

3. Select Flex field 1, Flex field 2 or Flex field 3.

4. Override the visibility, update the display name or make the field required.

5. Save your changes.

6. Enable as many of the flex fields as needed and they will be available for use on each contract.

Contracts Home Page

The **Contracts Home** page displays a dashboard that provides quick access to key tasks and activities related to the administration of contracts from one location. It can contain action items, a list of contracts up for renewal, and more.

It is displayed to users with the appropriate permission when they navigate to **Contracts** ⚕ > **Contracts > Contracts Home**.

A default contract dashboard is supplied by JAGGAER, but organizations can create their own versions and replace it. See "Personal Dashboards and Widgets in the **Site Essentials Handbook** or online searchable help for more information.

Permissions

The **Contract Administrator** permission is needed to access the Contracts Home page.

You will not see any content that you do not have access to. However, contract administrators who are editing a dashboard and do not have access to information within it will see a message indicating that they do not have access to the content.

Default Contracts Home Page Dashboard

A default dashboard on the Contracts Home page is provided by JAGGAER and allows you to view a summary of contract information in a graphic format, perform a contract search, use quick links, and view contracts that have pending alerts. What you see on the Contracts Home page may vary if your organization has customized the dashboard.

Customizing the Contracts Home Page

A default dashboard on the Contracts Home page is provided by JAGGAER, but organizations can create their own versions and replace it.

Users with appropriate permissions can create custom dashboards by clicking the **Configure This Dashboard** link on the Contracts Home page. See "Personal Dashboards and Widgets" in the **Site Essentials Handbook** or online searchable help for details.

Contract External Contacts

External contacts are individuals outside of your organization who may have an interest in a contract and who you want to receive email notifications regarding it. Adding an individual to the External Contacts page allows them to be selected as an external contact on a contract.

External contacts can be added to the External Contacts page individually, or linked to a supplier. They work a little differently in each case.

Adding and Deleting External Contacts (no link to supplier)

External contacts are shared between all contracts, so adding them to or removing them from the External Contracts page affects all contracts in the system:

- **Adding** an external contact on the External Contacts page makes their name available for selection on the Users and Contacts page of all contracts in the system. However, the person will not receive contract notifications unless they are added as an external contact to the Users and Contacts page of a contract, notifications have been selected in the External Contacts column on the contract Notifications page, and the person has the appropriate notification preferences enabled on their user profile.

- **Caution is advised** when **deleting** an external contact from the External Contacts page, as this will immediately remove the external contact from every contract they have been added to.

Linking External Contacts to Suppliers

Linking an external contact to a supplier is optional. If an external contact is linked to a supplier profile on the External Contacts page, they are automatically listed as an external contact on **all** contracts that have that supplier selected on a contract header. The contact can be viewed on the Users and Contacts page of contracts under the heading "Inherited on all contracts for this supplier". The external contact will receive the notifications that have been selected in the External Contacts column on the Notifications page of those contracts. They are *not* added to the supplier record itself. If an external contact has been linked to a supplier, they can only be deleted from contracts by removing the supplier link from the external contact.

Caution is advised if you are adding or deleting a supplier link on the External Contacts page, as the external contact will be added to or removed from all contracts that are using that supplier.

Create an External Contact

Complete these steps to make an external contact available for selection on the Users and Contacts page of all contracts in the system.

1. Navigate to **Contracts** ⬚ **> Contracts > External Contacts**.

2. Click the **Create New Contact** button.

3. Complete these fields:

   - **First Name** - Enter the first name of the external contact.

   - **Last Name** - Enter the last name of the external contact.

   - **Email** - Enter the email address of the external contact.

   - **Phone Number** (optional) - Enter the phone number of the external contact.

   - **Description** (optional) - Enter a description of the external contact.

4. Click **Save**. The external contact is immediately available for selection on the Users and Contacts page of contracts.

5. (optional) Complete these steps to connect the contact to a supplier:

   > **Important Note:** This will immediately add the contact to the Users and Contacts page of **all** contracts that have the supplier named on the contract header.

   a. Click the **Add a Supplier Link** button.

   b. Enter search criteria in the available fields and click the **Search** button. A list of suppliers that meet the search criteria is displayed.

   c. Click the **select** link to the right of the suppliers that you want to link to the external contact.

   d. Click **Save**. The external contact is immediately added to all contracts that list the supplier on the contract header.

Delete an External Contact

> **Important Note:** This will remove the external contact from every contract they have been added to.

1. Navigate to **Contracts** ⬚ **> Contracts > External Contacts**.

2. Click the **Delete** button.

3. Click **OK** in the confirmation window. The external contact is removed from all contracts.

Link an External Contact to a Supplier

Complete these steps to automatically add an external contact to the Users and Contacts page of all contracts that have the supplier they are linked to selected on the contract header. The external contact will receive all notifications selected in the External Contacts column on the contract Notifications page.

> **Important Note:** This will add the contact to the Users and Contacts page of **all** contracts in the system that have the supplier named on the contract header.

1. Navigate to **Contracts** ⊞ **> Contracts > External Contacts**.

2. Select the **contact** in the **External Contacts** panel on the left.

3. Click the **Add a Supplier Link** button in the **Attach Contact to All Contracts from these Suppliers** section on the right. The Supplier Search window opens.

4. Enter search criteria in the available fields and click the **Search** button. A list of suppliers that meet the search criteria is displayed.

5. Click the **select** link to the right of the suppliers that you want to link to the external contact.

6. Click **Save**.

The external contact is added to all contracts in the system that list the supplier on the contract header.

Disconnect an External Contact from a Supplier

Complete these steps to remove the link between an external contact and a supplier.

> **Important Note:** This will remove the external contact from the Users and Contacts page on **all** contracts in the system that have the supplier named on the contract header.

1. Navigate to **Contracts** ⊞ **> Contracts > External Contacts**.

2. Select the **external contact** that you want to remove the link to a supplier from in the External Contacts panel on the left.

3. Click **remove supplier link** next to the supplier name in the **Attach Contact to All Contracts from these Suppliers** section on the right.

The external contact is immediately removed from the Users and Contacts page of *all* contracts that have the supplier selected on the contract header.

Create Contract Statuses

Contract statuses indicate the "stage" of the contract. They reflect where a contract is in its lifecycle, or actions that can be performed on a contract. For example, contracts in **Draft** status mean that they are under construction and changes can be made. Contracts in **Executed: In Effect** status have been approved and are active, and most items on the contract cannot be changed.

For systems using **Contract Compliance Tracking**, contract statuses appear in the **Contract Status** field on the contract header and are manually updated by changing the value in the Contract Status field. The statuses in this field are organization-defined and should be set up in a way that is most useful to your company. Contract statuses are created initially during implementation, however contract administrators who have field management permissions are able to update contract statuses.

> **Note:** For systems with Contracts+, the statuses in the Contract Status field work separately from the color-coded standard contract statuses that appear with the contract record and that automatically change as the contract moves through the approval workflow.

1. Go to **Setup** ⚙ **> Field Management > Manage Field Names and Help Text**.

2. Through the tree browse to **Administration > contracts > General > General**.

3. Select **Contract Status**.

4. Select a list value to edit the display name.

5. Select the **New List Value** to create a contract status value. Once you enter an internal name it cannot be changed.

6. Add values that your organization uses for renewal status (pending department approval).

7. Save your edits and close the window.

Assign a Contract Manager to Price Set Approvals

An organization can allow a contract manager to approve individual price sets associated with the contract. The setting for this is found in the following location: **Setup** ⚙ **> General Site Settings > System Settings and Configuration > Misc Settings > Price files**.

Additional Details:

- An icon displays in the supplier profile if the user is a contract manager for a contract price set associated with the supplier.

- On the **Users and Contacts** page, users who are assigned to approve price files are indicated by a green check in the new **Price Approval** column. If the user is not assigned to approve price files then no value will appear in this column.

A contract manager must have **Approve Assigned Supplier Price Files** or **Approve All Supplier Price Files** permission in order to enable price file approval. Therefore, not all contract managers will have access to price file approvals.

The contract manager must have access to the currency for the price set before they can approve the pricing for that price set.

No specific assignment is needed via the contract, and the supplier associated with the contract does not need to be individually associated to the user. To allow a contract manager to have price file approval the administrator must:

- Enable the option "Price files can be approved by Contract Managers" in organization setup;

- Assign the contract manager the "Approve Assigned Supplier Price Files" or "Approve All Supplier Price Files" permission; and

- Ensure a price set is associated with the contract, and that the contract manager has access to the price set currency.

The "Pending price file link" on the homepage and admin dashboard displays the number of price files pending for the user. This number is determined by:

- Contract ownership

- Supplier assignment (assigned to specific supplier or assigned to approve all supplier price files)

- Access to the price set currency

The **Price Sets** page, upon initial display, shows the price sets assigned to the user by contract ownership or through assignment to the supplier.

- The contract price set to which the contract manager is assigned includes action links for the contract manager (approve, reject, change effective date, etc.).

- The contract manager does not see **Approve**, **Reject** or **Change Effective Date** links for price sets that are not part of the contract to which the contract manager is assigned.

The contract manager receives notifications for the specific price set associated with the contract when a price file is uploaded for review (the user must have this notification preference enabled in their profile).

Contract Customer Branded Portal

Customers with the JAGGAER ONE Supplier Management, Sourcing, Invoicing, Contract Compliance Tracking or Contracts+ solutions can create a branded portal and registration profile for suppliers.

- See "Customer Branded Portal Configuration" for information on configuring a Customer Branded Portal.

- See "Supplier Registration " for information on supplier registration activities.

- For additional supplier management activities, see the "Overview and General Information" section of the online help.

Contracts Integration with the eProcurement Process

Overview

The eProcurement section on a contract contains all information and configurations related to shopping from a contract, such as budgeting, spend, applicability, related goods and services, and PO clauses.

Related Permissions

See Contract Compliance Tracker Permissions for information on Contract Compliance Tracking permissions.

What is eProcurement Information?

The eProcurement section on a contract contains all information and configurations related to shopping from a contract, such as budgeting, spend, applicability, related goods and services, and PO clauses. This is also where users make a contract active for shopping or publish it to one or more consortium members if your organization uses the Consortium feature.

The following pages on a contract allow you to configure this information. These pages are only available for organizations using eProcurement.

- eProcurement Setup

- Set Contract Budget and Min/Max Limits

- Configure Contract Applicability to Users, Products and Supplier Fulfillment Centers

- Configure Contract Goods and Services (Forms, Non-Catalog and Other Items)

- Add PO Clauses to a Contract

Contracts can be integrated to the eProcurement process in the following ways:

Contract Number

Organizations can display the contract number in the shopping cart, on the purchase requisition, on the purchase order, and on the invoice (if the Invoicing solution is also in use). The contract number can also be included in data exports. **Note:** If your organization is already "live" with data exports such as a PO Export, contact JAGGAER Support to learn more about adding contract number to the export file.

Blanket PO Number

Blanket purchase orders can be used in association with purchases for a specific contract. The Blanket – or Standing PO number – overrides any other PO number in the system. For example, if you have set up a PO number wheel, this blanket PO number will override the number generated by the PO number wheel.

It is not possible to associate more than one blanket PO number with a contract. If your organization associates multiple blanket PO numbers with a contract, ask your implementation work group manager or customer success manager how best to handle this requirement.

Keep in mind, JAGGAER does not recommend using Blanket PO's when they are not required. The contract number serves as the reference to the contract and can be used in the same manner for reporting and analysis as blankets. Additionally, by having different PO numbers with contract usage, tracking of purchasing activity is more detailed and easier to manage.

Payment Terms

Organizations can add payment terms to contracts, and view the potential savings available if all invoices associated with a contract are paid using early payment savings.

Contract payment terms are displayed on non-PO invoices or invoice items generated from a contract. If contract payment terms have been negotiated at the contract level, users creating invoices are able use the contract payment terms instead of organization or supplier default payment terms.

Contract Restrictions

Organizations can easily manage contract and budget restrictions, both when the user is submitting a cart and through the approval workflow process. Contract managers can configure and enforce budget maximums for blanket orders. They may also manage document restrictions by contract including PR maximum spend, PR minimum spend and line quantity maximums. When using these settings, an organization can choose whether to warn the user in the cart when specified requirements are not met, or an error can prevent cart submission. In addition, organizations using PR workflow can choose to route documents to workflow for all contract restrictions as well as warn approvers or prohibit document approval in a workflow step.

Note: This functionality is not enabled by default, and must be configured with the assistance of JAGGAER (via workflow changes and document setup). Organizations utilizing workflow will be required to configure a new workflow step and configure the appropriate folder/approvers. (Contact Customer Support or your project team.)

The requisition or invoice document may be configured to ignore, warn or error if the condition is not met. Also, workflow may be configured to route documents to approvers based on the specified values. End users can view defined contract restrictions in the More Info contract overlay in the cart or requisition. This information will allow them to make the appropriate changes if they receive warnings or errors.

Contract Pricing

Negotiated pricing is typically characteristic of a contract. The discounted pricing must be handled manually for non-catalog items – meaning the user/buyer must determine the appropriate pricing and enter that amount for the line item. Hosted catalog data from a supplier can be associated with a contract. Additionally, suppliers can provide multiple price files, containing different item sets and pricing. This allows different contracts to be used by different users in an organization.

For example, if the Chemistry Lab has contract pricing with your fine chemicals supplier, and this pricing is offered only to the Chemistry Lab, you can request that the supplier submit a separate, special pricing file to JAGGAER to represent this contract. You would create a contract for fine chemicals, specifying the supplier and limiting use of the contract to the Chemistry Lab. Once the pricing file has been received by JAGGAER, you can associate the fine chemicals pricing file to the fine chemicals contract. Only members of the Chemistry Lab will be able to see this pricing during product searches, and only they will be able to select this contract in the shopping cart.

Control a Supplier's Ability to Adjust Contract Non-Catalog Item Prices

An option on the eProcurement page allows organizations to control at the contract level whether suppliers are allowed to edit a contract non-catalog item's price on line items that have been populated from the contract on portal invoices or credit memos. **Note:** This setting applies to price only. Part No., Description, Product Size, Packaging, and Extended Price fields cannot be edited by a supplier even if the setting is enabled.

Supplier Visible Custom Fields

Organizations have the option to display a custom field to suppliers creating an invoice from a contract. If this feature is enabled, organizations can choose one custom field that is displayed on the **eProcurement Setup** page by default for all contracts. On each contract, contract managers can choose to make the field visible to suppliers and also make it mandatory that suppliers complete the field before they can submit an invoice.

Set Default Account Codes for Contract Line Items on Invoices

Organizations can add default contract account codes to contracts, which are automatically applied to invoice line items associated with the contract based on a set of system rules. These rules determine which account codes are displayed in various situations, such as when PO or non-PO lines are added to an invoice, if the invoice owner changes, if an organization has commodity code mapping, etc. This saves invoice managers the time required to search for and apply the correct account codes to individual line items on invoices.

Goods and Services

Goods and services are items under contract that are not hosted catalog or punchout items. Contract administrators have several options for promoting non-catalog items, forms, or instructions on how to order under a specific contract.

Contract Payment Terms

Overview

The contract payment terms feature allows organizations to add payment terms to contracts, and view the potential savings available if all invoices associated with a contract are paid using early payment savings.

Once a contract with payment terms reaches Executed: In Effect status, its **payment terms** can be used on **invoices** or **invoice items** generated from the contract. If contract payment terms have been negotiated at the contract level, users creating invoices can use contract payment terms instead of organization or supplier default payment terms.

Related Permissions

See Contract Compliance Tracker Permissions for information on Contract Compliance Tracking permissions.

Requirements

- The **Contract Compliance Tracking** and **Invoicing** licenses are required.

- On the **Configure Contract Summary Screen**, the **Payment Terms** option in the **Controls** section under the **eProcurement, Budget, and Spend** heading defines how payment terms are displayed on the Contract Summary page.

- Organizations may need to contact JAGGAER to optimize their invoice and purchase order workflow, and invoice import settings for use with this feature.

Payment Terms on Contracts

- **eProcurement Setup**

    - The **Payment Terms** section is displayed on the contract eProcurement page if the contract has a supplier assigned.

    - Contract payment terms are entered in the **Discount**, **Discount Type**, **Days** and **Net** fields. See "eProcurement Setup" on page 651.

- **Sourcing Events** - Contracts created from a sourcing event will display payment terms from the sourcing event by default. They can be overridden on the contract.

- **Amendments, Copies and Renewals** - Contract amendments, renewals and copies will display payment terms from the original contract by default.

- **Consortiums**

  - For **parent** consortiums, contract payment terms display the total potential savings for their organization only, not for all members of the consortium.

  - For **member** consortiums, contract payment terms will display the potential savings for their organization only. **Payment terms are not editable on shared contracts in a member org**. Member organizations must have the Invoicing solution to use payment terms.

Contract Payment Terms on Invoices

Businesses usually have a payment term hierarchy in place to determine which payment terms are applied when either supplier or organization default payment terms can be used. Here is how contract payment terms are applied to buyer and supplier invoices within that hierarchy.

Buyer Invoices

- For **non-PO invoices**, contract payment terms are used when a non-PO invoice is created from a contract, or, for non-PO invoices created from the AP dashboard, when a contract is associated with an invoice line item.

- For **PO invoices**, payment terms are populated from the purchase order. If all lines on the requisition used to create a purchase order point to one contract, contract payment terms are used.

- For both PO and non-PO invoices, when **line items are associated with a contract that has payment terms**, the system will check to see if payment terms on the invoice are different from payment terms on the contract line item. If they are different, it will apply contract payment terms from the line item to the invoice and a message will indicate that the payment terms on the invoice have been updated.

  > **Note:** If multiple line items on an invoice are assigned to different contracts with different payment terms without saving after each change, contract payment terms from the first changed invoice line item are applied to the invoice on Save.

- If an invoice has one line item assigned to a contract, and a **manual change** is made to the payment terms, the system will ask if the user wants to use the contract payment terms or the modified payment terms when the invoice is

submitted to workflow, and apply the user's selection.

- Otherwise, supplier or organization default payment terms are used as determined by the organization's payment terms logic.

> **Note:** ADW workflow options can be set up to stop the workflow where there may be more than one set of payment terms on an invoice, and a decision needs to be made about which ones to use.

Supplier Invoices

Here is how contract payment terms are applied when a supplier creates a supplier invoice:

- From **contracts** - Contract payment terms are used.

- From **sales orders** - Payment terms are populated from the sales order, based on payment terms from the originating purchase order.

- When **line items are associated with a contract that has payment terms**, the same logic used for buyer invoices applies – contract payment terms from the line item are applied to the invoice and a message will indicate that the payment terms on the invoice have been updated.

The **Use Organization Payment Terms** setting determines how payment terms are applied once the supplier invoice is sent to the customer and becomes a buyer invoice:

- If the setting is **On**, the organization's payment term logic is used:

    - If all lines on a supplier invoice are assigned to one contract with payment terms, contract payment terms are used on the buyer invoice.

    - If line items on a supplier invoice are assigned to different contracts, the organization's payment term logic is used on the buyer invoice.

    - If a supplier invoice has been created from a sales order, the buyer invoice will use payment terms from the original purchase order, even if the payment terms were changed on the supplier invoice.

- If the setting is **Off**, the buyer invoice will reflect whatever payment terms are on the supplier invoice:

    - If a supplier has changed the original SO/PO payment terms or the contract payment terms on a supplier invoice, the **changed values** will be on the buyer invoice created from the supplier invoice.

Buyer and Supplier Invoice Imports

- **Buyer Invoice Imports**

    - If an imported buyer invoice **does not** have payment terms - Contract payment terms are used if all lines on the invoice point to one contract with payment terms. Otherwise, supplier or organization default payment terms are used as defined by the organization's payment terms logic.

    - If an imported buyer invoice **does** have payment terms - Payment terms from the buyer invoice are used, and override contract payment terms.

- **Supplier Invoice Imports**

    - Buyer invoices are generated from the supplier invoice import. The **Use Organization Payment Terms** setting determines how contract payment terms on imported supplier invoices are applied to buyer invoices created from them:

        - If the setting is **On** - The organization's payment term logic is used, regardless of what is on the supplier invoice. This means that contract payment terms are used if all lines on the invoice point to one contract with payment terms. Otherwise, supplier or organization default payment terms are used as defined by the organization's payment terms logic.

        - If the setting is **Off** - The buyer invoice will reflect whatever payment terms are on the supplier invoice. If the supplier invoice *does not* have payment terms, contract payment terms are used if all lines on the invoice point to one contract with payment terms. Otherwise, supplier or organization default payment terms are used as defined by the organization's payment terms logic.

Workflow

Advanced Dynamic Workflow (ADW) Document-level rules are available on **Invoice Workflow** and **Purchase Order Workflow** to create workflow steps that can be used to compare payment terms on invoices, and if there are differences, trigger a stop so that approvers on the rule can evaluate and apply the appropriate payment terms.

CSV and XML Imports/Exports

The following columns in the **Contract CSV** and **XML** import/export files allow payment terms on a contract to be updated via import:

- **DiscountType**
- **Discount**
- **Days**
- **Net**

Consortium Management and Contracts

Overview

Contracts can be used in association with the Consortium Management functionality provided by JAGGAER. With consortium management there are two perspectives, each of which is explained below:

Related Permissions

See Contract Compliance Tracker Permissions for information on Contract Compliance Tracking permissions.

Consortium Management and Contracts

Consortium / GPO Perspective

This perspective represents organizations that manage relationships with multiple suppliers and offers these negotiations to members of the consortium or group purchasing organization. A consortium will use its JAGGAER site to set up the suppliers and apply the appropriate purchasing method (hosted catalog price file, non-catalog purchases, and contracts). From a consortium perspective, the following tasks can be accomplished through the contract compliance feature:

- Administer consortium contracts from the Contracts Home page. **Note:** The **Consortium Contract Administrator** permission is required to see this information.

- Publish a contract to one or more members.

- Use Contract Search to determine what contracts have been published, what contracts

are available to individual members, and more.

- View spend and budget information by member organizations.

Note: Contract information is included in the standard consortium reporting, which is available through **Contracts** 🔲 **> Consortium Settings > Consortium Spend Reports**.

Member Perspective

Organizations that participate in a consortium or GPO are referred to as "members." As a member, you can take advantage of negotiated supplier relationships offered by the consortium. This includes contracts and contract information. If the member organization has enabled the contract purchasing feature, additional information pertaining to the consortium contract will also be available. From a member perspective, the following tasks can be accomplished through the contract purchasing feature:

- Receive emails notifying the member organization when a new contract is available from the consortium. Notification Preference set up through profile: **Consortium contract published / unpublished**. **Note:** This functionality is available if the member organization is using the contract purchasing feature.

- Administer consortium contracts from the Contracts Home page. **Note:** The **Consortium Contract Administrator** permission is required to see this information.

- View information about consortium contracts published to the member organization and determine whether or not to subscribe to the contract. **Note:** The **Consortium Contract Administrator** permission is required to see this information.

- View consortium contracts through the contracts search. These contracts are identified by the following icon: 🔳 **Note:** If your organization does not use contract purchasing, a new contracts tab will display if you are part of a consortium using contracts.

- Changes made to a contract at the consortium level are automatically applied at the member level.

- Once the member has subscribed to the contract, orders can be placed using the contract number and summary spend will be reported by the contract number to the consortium.

- Once a member subscribes to a contract, information about the contract can be updated specifically for the organization.

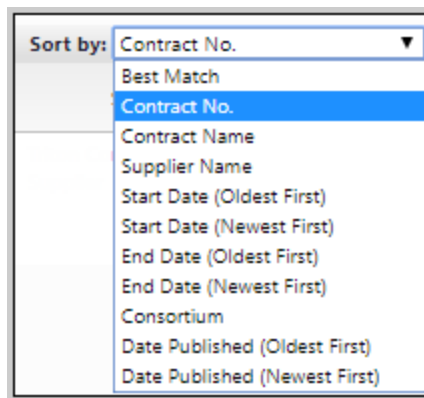## Subscribe To and Manage Consortium Contracts

Consortium member organizations must subscribe to a contract to take advantage of the relationship set up between the supplier and the consortium. After a contract is published by the consortium organization to the member organization, an email will be sent to the member

organization. From there, the member organization determines whether or not to subscribe to the contract. Once the member has chosen to subscribe to the contract, orders can be placed using the contract number, and summary spend will be reported by the contract number to the consortium.

This task is only relevant to member organizations where a consortium relationship is established and set up by JAGGAER.
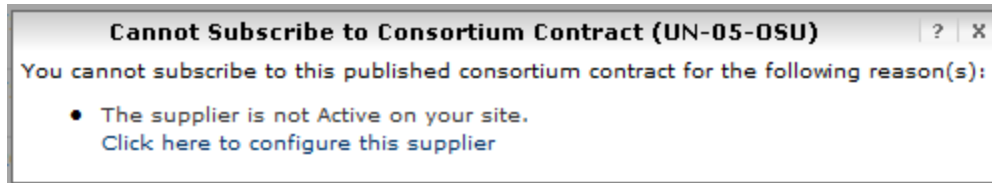
The **Consortium Contract Administrator** permission is required to perform this task.

1. Navigate to **Contracts** ![icon] **> Consortium Settings > Subscribe To Consortium Contracts**. The Consortium Contracts screen opens.

2. Use the **search filter** to determine what published contracts to view/display. By default, all active and effective (dated) contracts display. Use any of the fields shown to view specific contracts or contract types. Click **Search** to view the contract search results.

3. From the contract search results, you can:

   • View all contracts that have been published by a consortium to the member.

   • Sort the contracts by the following options:

   • Subscribe to a consortium contract or unsubscribe. By subscribing to a contract, it will immediately be available for use on your site. Edits can be made to the contract after subscribing. To subscribe to a contract, enable the Select checkbox then choose **Subscribe** from the drop-down box, then click **Go**. To unsubscribe, choose **End Subscription**.

   • Activate a supplier that is not active on the member site. A **not available** link displays in the Select checkbox for suppliers that are not enabled on the site. Click this link for more information, as shown below. From here, you can go to catalog management to enable and update the supplier information (Catalog Management

permission required).

Cannot Subscribe to Consortium Contract (UN-05-OSU)   ? | X

You cannot subscribe to this published consortium contract for the following reason(s):

- The supplier is not Active on your site.
  Click here to configure this supplier

Publish a Consortium Contract to Members

When a contract is created and designed to be used by consortium members, the consortium must publish the contract. By publishing a contract, it is available for use by the member organization(s) selected by the consortium organization. In addition to determining what organizations "have access" to a contract, this task also allows an administrator to automatically publish a contract to new members. **Note:** If the contract originated in the Contract Director product, publishing options must be made in Contract Director.

The goal of this task is to publish a contract to consortium members.

1. Navigate to **Contracts** ✦ **> View Contracts > Contract Administrator's Dashboard**.

2. Search for and open the appropriate contract. Click on the drop-down selection next to the **Contract No** (Far left column) to select **View/Edit Details** for the contract.

3. Click the **Publish** tab. **Note:** This tab is only available to users with the **Consortium Contract Administrator** permission.

4. The member organizations associated with the consortium are listed. **Note:** Please contact JAGGAER if a member organization is not listed here.

5. Select the organizations that can take advantage of the contract:

    - To allow all members – current and future – to take advantage of the contract, enable the **Automatically publish to new members** checkbox and select the **All** link.

    - To allow select members to take advantage of the contract, enable the appropriate **Publish** checkboxes.

    - To disallow a member from using a contract, disable the **Publish** checkbox. **Note:** The subscribed checkbox indicates whether or not the member organization has enabled the published contract.

6. Click **Save** to save all changes.