

Goods Purchase Order

Procurement Forms

General Steps

- ▶ Locate the Goods Form under Procurement Forms in Jaggaer.
- ▶ Enter the supplier name. Verify the correct address is being used.
- ▶ Enter each item from the supplier quote as a separate line item and ensure descriptions, quantities, pricing, and charges match the supplier documentation.
- ▶ Click Add and Return for multiple lines, until the requisition reflects the complete quote. Add a \$0 shipping line if applicable.
- ▶ Review the requisition for accuracy, correct any errors, and verify the shipping address and account string before proceeding to checkout.
- ▶ Attach the supplier quote, contract, estimate, or other supporting documentation to substantiate the purchase request.
- ▶ Select Place Order to submit the requisition for approval. Once approved, a Purchase Order will be issued to the supplier, and invoices must be manually uploaded to the Purchase Order for payment.

What is a Procurement Form?

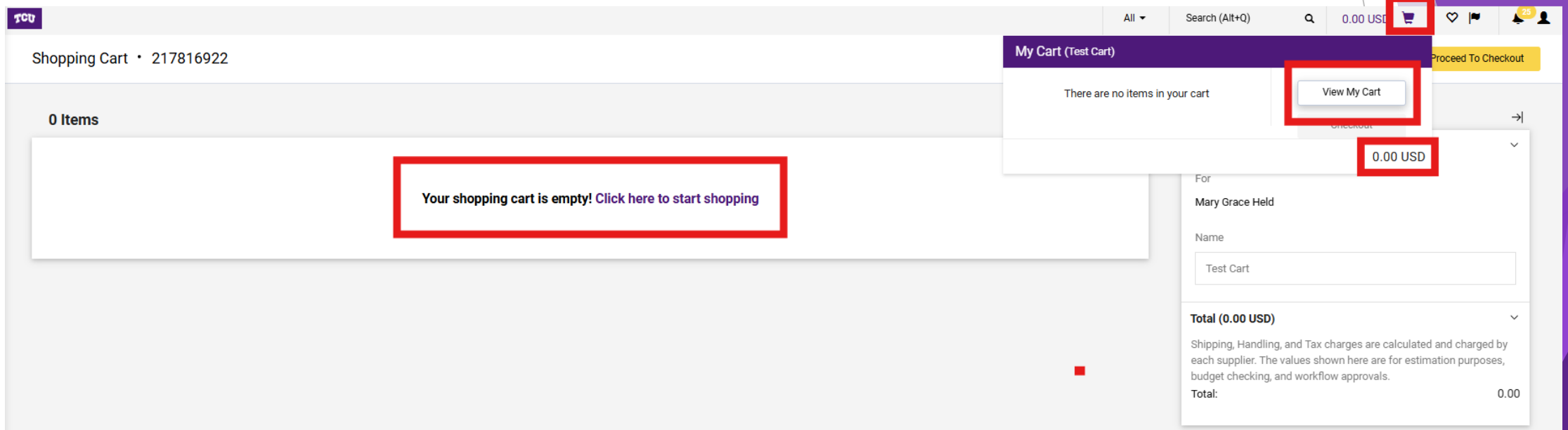
- ▶ Procurement Forms are used to request goods or services that are not available through a Jaggaer Punchout Catalog.
- ▶ Verify the purchase is not exempt from a Purchase Order under Appendix B of the Procurement Policy.
- ▶ A Purchase Order is created from the approved requisition, and will be issued to the supplier after approval.

Two Roles in Jaggaer

- ▶ A Requester creates and submits requisitions for goods and services.
- ▶ An Approver reviews and authorizes purchases on behalf of their department.
- ▶ Depending on your Jaggaer role, you may submit the requisition yourself or assign it to a Requester for final submission.

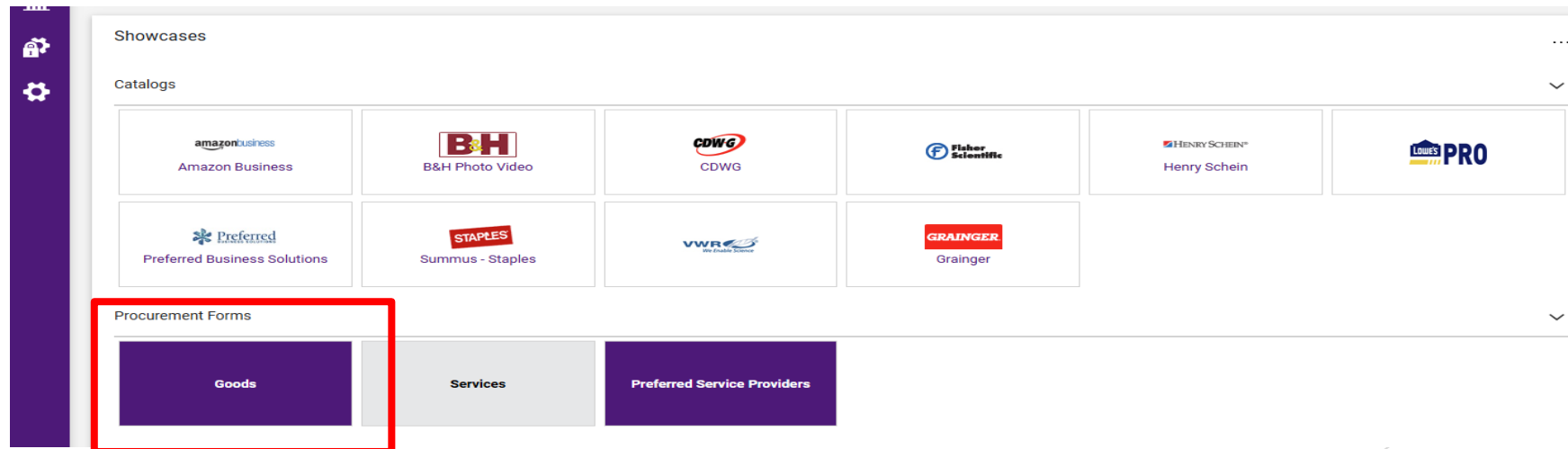
Before You Begin

- Before you begin, verify your Shopping Cart is empty.



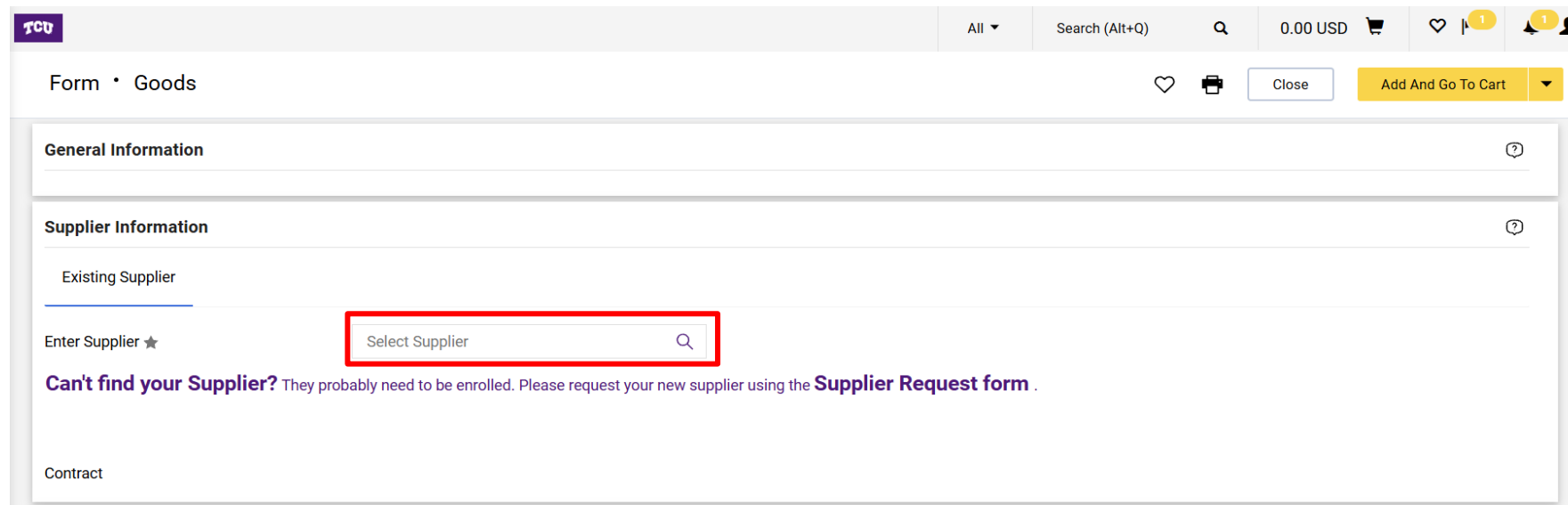
Select Goods Form

- ▶ Begin by selecting the Goods Form from the Procurement Forms section.
- ▶ This form should be used when purchasing physical goods that are not available through a Punchout Catalog.
- ▶ Each item being purchased will be entered individually into the requisition.



Select a Supplier

- ▶ Enter the supplier's name and select the correct supplier record from the search results.
- ▶ Verify that the supplier has a valid email address on file, as Purchase Orders are typically delivered electronically.
- ▶ Confirm that you have selected the correct supplier before continuing.



The screenshot shows the TCU Supplier Selection interface. At the top, there is a header bar with the TCU logo, a dropdown menu set to 'All', a search bar with the placeholder 'Search (Alt+Q)', and a currency display showing '0.00 USD'. Below the header, there is a navigation bar with 'Form • Goods' and a 'Close' button. The main content area is divided into sections: 'General Information', 'Supplier Information', and 'Contract'. Under 'Supplier Information', there is a sub-section 'Existing Supplier' with a search bar labeled 'Enter Supplier ★' and a placeholder 'Select Supplier'. A red box highlights the search bar. Below the search bar, there is a message: 'Can't find your Supplier? They probably need to be enrolled. Please request your new supplier using the [Supplier Request form](#) .'

Verify Supplier Address

- ▶ Review the supplier address that populates on the form.
- ▶ Some suppliers maintain multiple addresses within Jaggaer for ordering and payment purposes.
- ▶ If the displayed address is incorrect, select the pencil icon and choose the appropriate address for this order.

The screenshot shows the 'Supplier Information' section of a web form. It includes a tab for 'Existing Supplier' and a search field labeled 'Enter Supplier ★'. The search field contains the text 'robert hal'. A dropdown menu is open below the search field, listing two suppliers: 'Robert Half International' and 'Murnan,Robert Todd'. Each entry includes a 'Doing Business As' description. A red rectangular box highlights the search field and the dropdown menu. Below the dropdown is a link that says 'Request New Supplier'. To the left of the dropdown, there is a link that says 'Can't find your Supplier? They proba...'. At the bottom left, there is a label 'Contract'.

Supplier Information ⓘ

Existing Supplier

Enter Supplier ★

Can't find your Supplier? They proba...

Contract

robert hal × 🔍

- Robert Half International
Doing Business As: Robert Half Management Resources; Robert Half Legal; Office Team; Accountemps; Robert Half Technolog
- Murnan,Robert Todd
Doing Business As: Robert Todd Murnan; DBA Halftime Dogs

[Request New Supplier](#)

Verify Supplier Address

Supplier Information

Existing Supplier

Supplier ★ Robert Half International × Q Robert Half International ×

Fulfillment Address **PS Location** ⓘ
PO Box 743295
Los Angeles, California 90074-3295 United States

Distribution Method ★

The system will

Manual

Can't find your Supplier? They probably need to be enrolled. Please request your new supplier using the [Supplier Request form](#).

Contract

Item / Product

select different fulfillment center

Results Per Page 10 Suppliers found: 1 Page 1 of 1 ?

Supplier Name/Address	Select
Robert Half International Fulfillment Center 2: PO Box 743295 Los Angeles, California 90074-3295 United States PS Location: PO Box 743295 Los Angeles, California 90074-3295 United States	Select Select

Supplier Information

Existing Supplier

Supplier ★ Robert Half International × Q Robert Half International ×

Fulfillment Address **PS Location** ⓘ
PO Box 743295
Los Angeles, California 90074-3295 United States

Distribution Method ★

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

Manual

Can't find your Supplier? They probably need to be enrolled. Please request your new supplier using the [Supplier Request form](#).

Contract

Select Contract

Associating a Contract

- ▶ If a contract has been executed with the supplier, it should be associated with the requisition.
- ▶ Use the contract search feature to locate the correct contract record.
- ▶ Attaching the contract helps document the terms governing the purchase.

The screenshot shows a web application interface with a 'Supplier Information' form and a 'Select Contract' dialog box. The dialog box is titled 'Select Contract' and contains a warning message: 'No contracts are available for assignment to this form.' Below the warning is a radio button option labeled 'No Contract'. The background form has sections for 'General Information', 'Supplier Information', and 'Contract'. The 'Contract' field at the bottom is highlighted with a red box and contains the text 'Select Contract'.

General Information

Supplier Information

Existing Supplier

Supplier ★

Fulfillment Address

Distribution Method ★

The system will distribute purchase order

Manual

Can't find your Supplier? They probably need to be enrolled. Please request your new supplier using the [Supplier Request form](#).

Contract

Select Contract

Complete Line Items

- ▶ Enter the information exactly as it appears on the supplier's quote whenever possible.
- ▶ Product descriptions, quantities, pricing, and charges should closely match the supplier documentation.
- ▶ Accurate information reduces delays during approval and invoice processing.

Complete Line Items

TCU

All ▾

Search (Alt+Q) 🔍

364.94 USD 🛒

👤 1

🔔 1

Form • Goods

Contract

Select Contract

Item / Product Information

Description ★

Catalog No.

Quantity ★

Unit Price ★

Unit / Measure

Manufacturer Part No

Taxable

Internal Attachments

External Attachments

Half Pencils

242 characters remaining expand | clear

1234567

142

2.57

EA - Each ▾

☐

Add

Add

Use Add to Cart and Return for multiple line items →

Close

Add And Go To Cart

Add to Cart and Return

Add to Cart

Add to Draft Cart or Pending PR/PO

Add to Draft Change Request

Add to new Cart

Adding Multiple Lines

- ▶ Each item listed on the supplier quote should be entered as a separate line item.
- ▶ After entering a line item, select Add to Cart and Return to continue entering additional items.
- ▶ Repeat this process until all items from the supplier quote have been added to the requisition.

Shipping Charges

- ▶ Consider adding a separate shipping line item with a value of \$0 when shipping charges are not yet known.
- ▶ This allows shipping costs to be added later without requiring a Change Request.
- ▶ This practice can reduce delays when supplier invoices include freight or delivery charges.

Review Requisition

- ▶ Review all line items carefully after they have been added to the requisition.
- ▶ If a line item needs to be edited or removed, select the three-dot menu associated with that line.
- ▶ Verify that the quantities, pricing, and descriptions accurately reflect the supplier quote.

Shopping Cart • 204686817

Assign Cart Proceed To Checkout

Robert Half International • 410 Items • 1,177.32 USD

SUPPLIER DETAILS PS Location : PO Box 743295, Los Angeles, Calif...

Line	PS Location : PO Box 743295, Los Angeles, California 90074-3295 United States /Packaging	Unit Price	Quantity	Ext. Price
1	Half Pencils 1234567 EA - Each 2.57 Qty: 142 EA - Each 364.94			
ITEM DETAILS				
Commodity Code				
2	Half Pencils 1234567 EA - Each 2.57 Qty: 142 EA - Each 364.94			
ITEM DETAILS				
Commodity Code				
3	Whole Pencils 7654321 EA - Each 5.14 Qty: 71 EA - Each 364.94			

Summary

Details

For Mary Grace Held

Name 2025-08-01 108018342 01

Total (1,177.32 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.

1,177.32

Remove

Add to Favorites

Move to Another Cart

Add to Draft Cart or Pending PR/PO

Add to Draft Change Request

Assigning a Cart

- ▶ If you do not have Requester permissions, select Assign Cart to transfer the requisition to an authorized Requester.
- ▶ Search for and select the appropriate individual within your department.
- ▶ The Requester can then review and submit the requisition on your behalf.

The screenshot shows the TCU Shopping Cart interface. At the top, the cart total is 812.38 USD. Below the header, the cart ID is 204686817. A red box highlights the 'Assign Cart' button. The main content area shows 3 items, with the first item being 'Half Pencils' from Robert Half International. The item details show a quantity of 142 EA - Each at a unit price of 2.57, totaling 364.94. The summary section shows the total of 812.38 USD.

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Half Pencils	1234567	EA - Each	2.57	Qty: 142 EA - Each	364.94

The screenshot shows the 'Assign Cart: User Search' dialog box. It has a search bar with 'no value' and a dropdown menu. Below the search bar, there is a list of profile values, including 'JOHNNY TREVINO'. A red box highlights the 'Assign' button at the bottom right of the dialog.

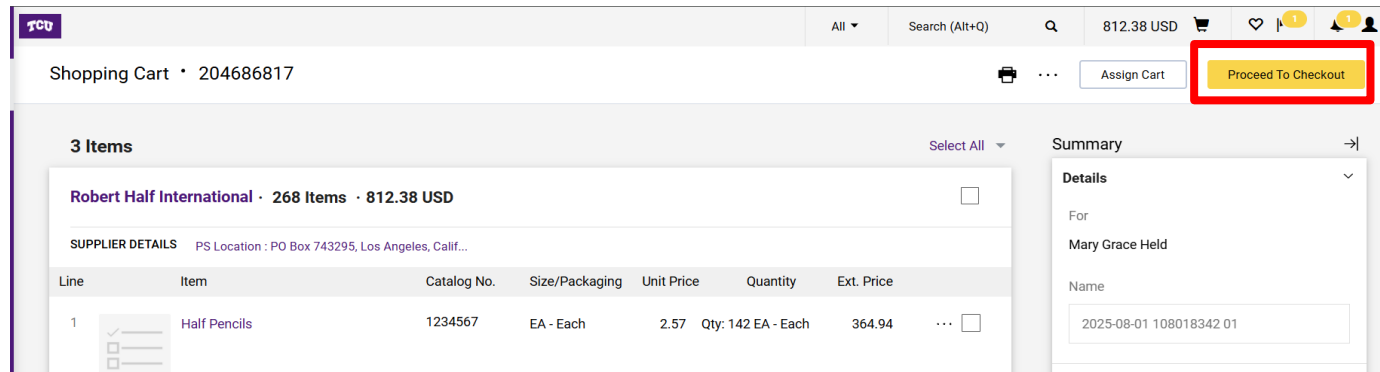
Assign Cart To: no value SELECT or SEARCH

Note To Assignee: PROFILE VALUES JOHNNY TREVINO

Assign Close

Proceed to Checkout

- ▶ Any errors displayed within the requisition must be corrected before proceeding.
- ▶ Review all validation messages and make any required corrections.
- ▶ Once the requisition is ready, select Proceed to Checkout.



Shipping and Accounting

- ▶ Verify that the shipping or delivery address is correct before submitting the requisition.
- ▶ Review the account string to ensure the purchase is being charged to the correct budget.
- ▶ If updates are needed, select the pencil icon to modify the shipping information or account string.
- ▶ Different line items may be assigned to different account strings when appropriate.

Shipping and Accounting

General

Business Unit

TCU

Texas Christian University

Cart Name

2025-08-01 108018342 01

Description

no value

Prepared by

Mary Grace Held

Prepared for

Mary Grace Held

Cart Source

Manual

Shipping

Ship To

Attn: Mary Grace Held

3101 BELLAIRE DRIVE NORTH

Rm 2102

Fort Worth, TX 76109

United States

Delivery Options

Ship Via

Best Carrier-Best Way

Billing

Bill To

TCU-Financial Services

TCU Box 297011

Fort Worth, TX 76129

United States

Billing Options

Accounting Date

no value

Description

no value

(This field will print on check)

Summary

Draft

✖

Correct these issues.

You are unable to proceed until addressed.

Required: Business Unit

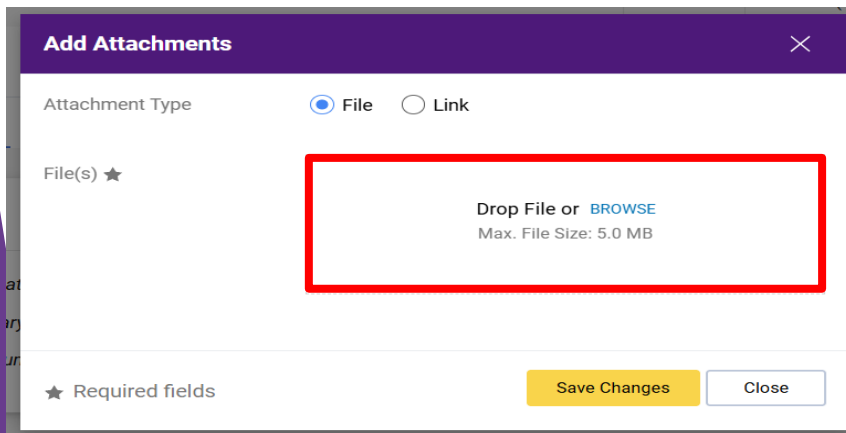
Required: Account

This Supplier does not have a PO Distribution Email on file. Please complete a Supplier Request to initiate the process of that Supplier providing the information TCU needs to be eligible for PO Purchases.

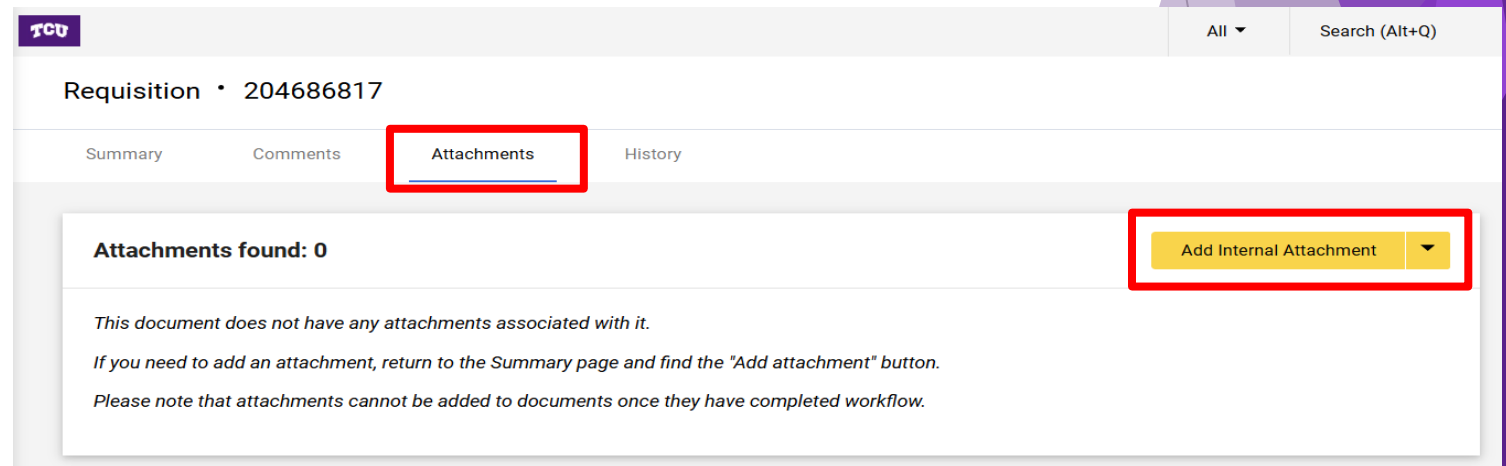
Accounting Codes				
GL Unit	Account	Fund	Department	Project
TCU Texas Christian University	no value ✖ Required	11000 TCU General	22200 Financial Services	no value

Attachments

- ▶ Every Procurement Form must include supporting documentation.
- ▶ Supporting documents may include supplier quotes, proposals, estimates, contracts, or similar records.
- ▶ Open the Attachments tab and upload all required documents before submitting the requisition.



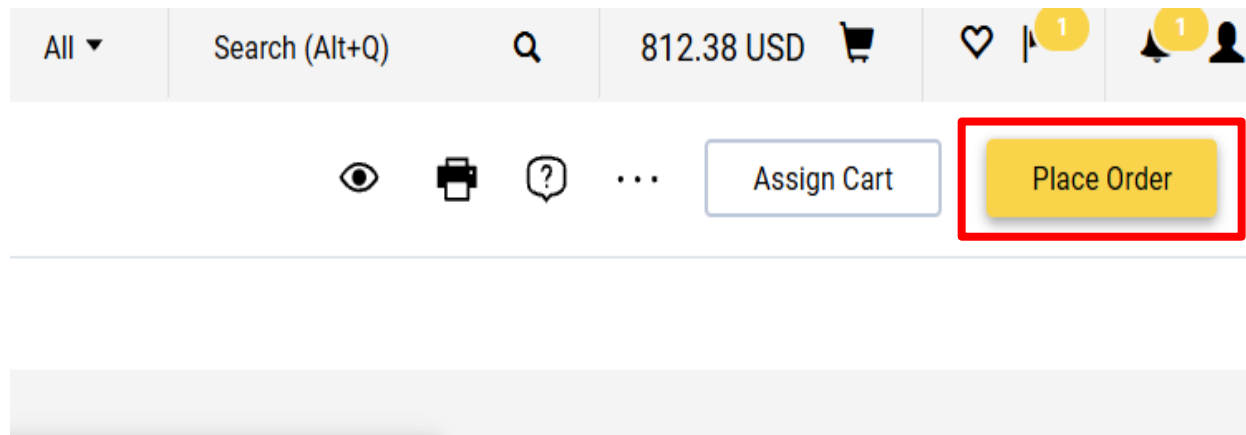
The 'Add Attachments' dialog box is shown with a purple header. It contains an 'Attachment Type' section with 'File' selected and 'Link' as an option. Below this is a 'File(s)' section with a red-bordered box containing the text 'Drop File or BROWSE' and 'Max. File Size: 5.0 MB'. At the bottom, there are 'Save Changes' and 'Close' buttons, and a 'Required fields' indicator.



The screenshot shows the 'Attachments' tab of a requisition form for requisition 204686817. The 'Attachments' tab is highlighted with a red box. Below the tabs, it says 'Attachments found: 0' and 'Add Internal Attachment' with a dropdown arrow, both highlighted with red boxes. The main content area contains a message: 'This document does not have any attachments associated with it. If you need to add an attachment, return to the Summary page and find the "Add attachment" button. Please note that attachments cannot be added to documents once they have completed workflow.'

Submission

- ▶ Review the requisition one final time to ensure all information is accurate and complete.
- ▶ Confirm that all required supporting documentation has been attached.
- ▶ Select Place Order to submit the requisition into workflow approval.



Approval Workflow

- ▶ The requisition will automatically route through the appropriate approval workflow.
- ▶ Additional approvals may be required depending on the account strings used.
- ▶ Once all approvals have been completed, a Purchase Order will be issued to the supplier.

Paying Supplier Invoices

- ▶ A Purchase Order does not remit payment to a supplier. It tells the supplier the items or services you wish to purchase from them, and provides a “promise to pay” agreement.
- ▶ In order to pay the supplier, you must submit an invoice against your Purchase Order. Review the Manual Invoice Process guide for steps on how to pay an invoice.

An aerial photograph of the Texas Christian University (TCU) campus, showing various buildings with red-tiled roofs, green lawns, and trees. The image is framed by a purple and white geometric border on the left and right sides.

Finance & Administration
Office of Procurement

QUESTIONS?

Email

Procurement@tcu.edu

TCU