Finance & Administration
Office of Procurement

Goods Purchase Order

Procurement Forms

LEAD ON.

June 2026

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?

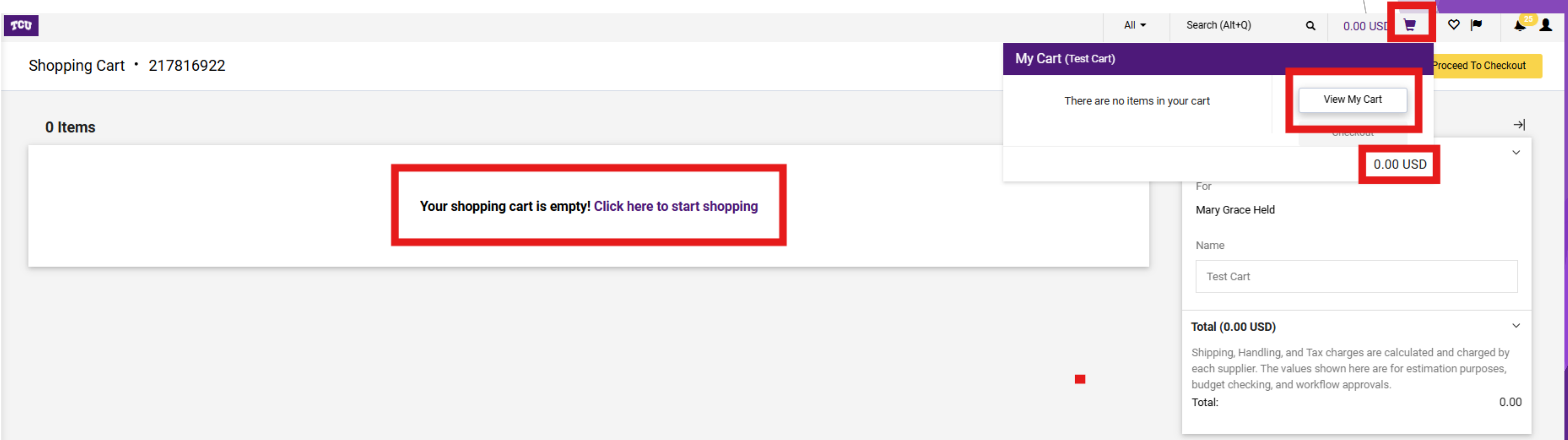
- Procurement Forms are used to request goods or services that are not available through a Jaggaer Punchout Catalog.
- Verify the purchase is not exempt from a Purchase Order under Appendix B of the Procurement Policy.
- A Purchase Order is created from the approved requisition, and will be issued to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

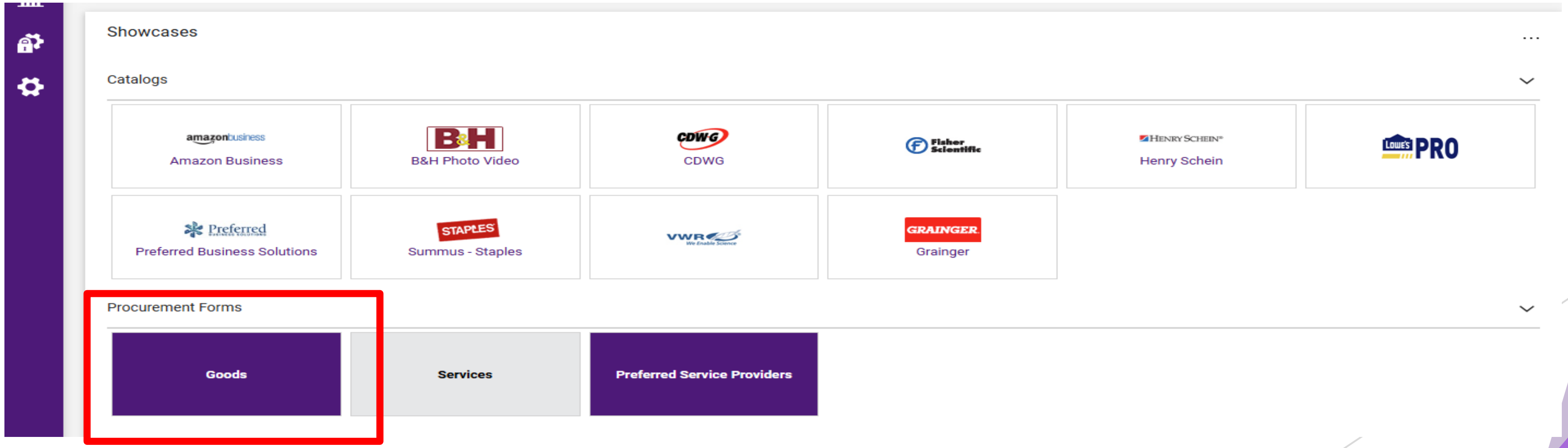
Before You Begin

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



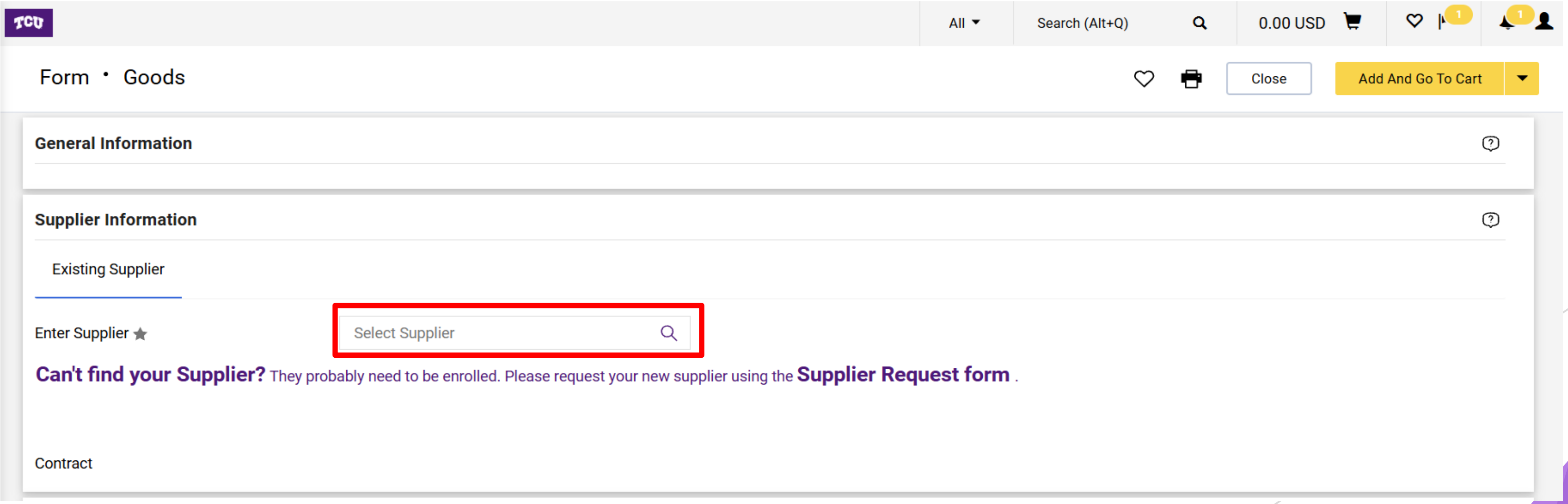
Select Goods Form

- 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.



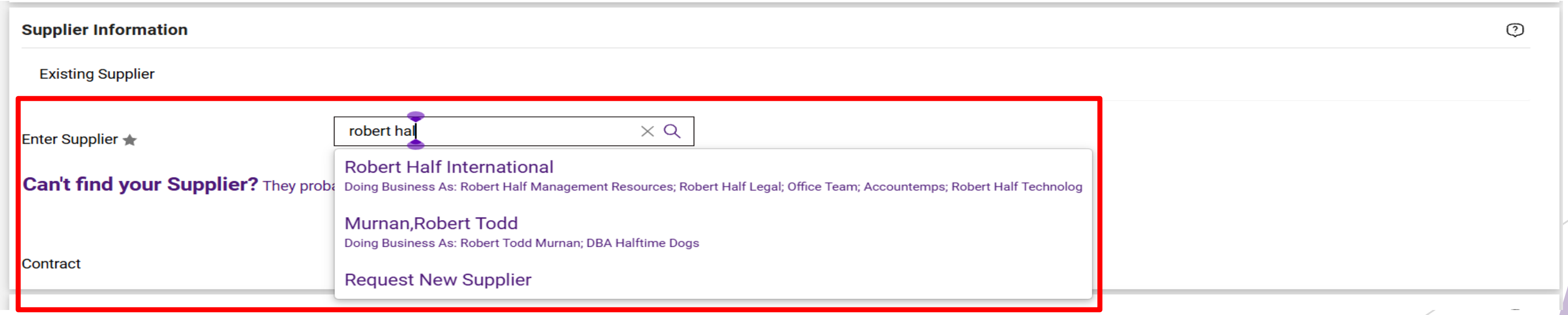
Select a Supplier

- 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.

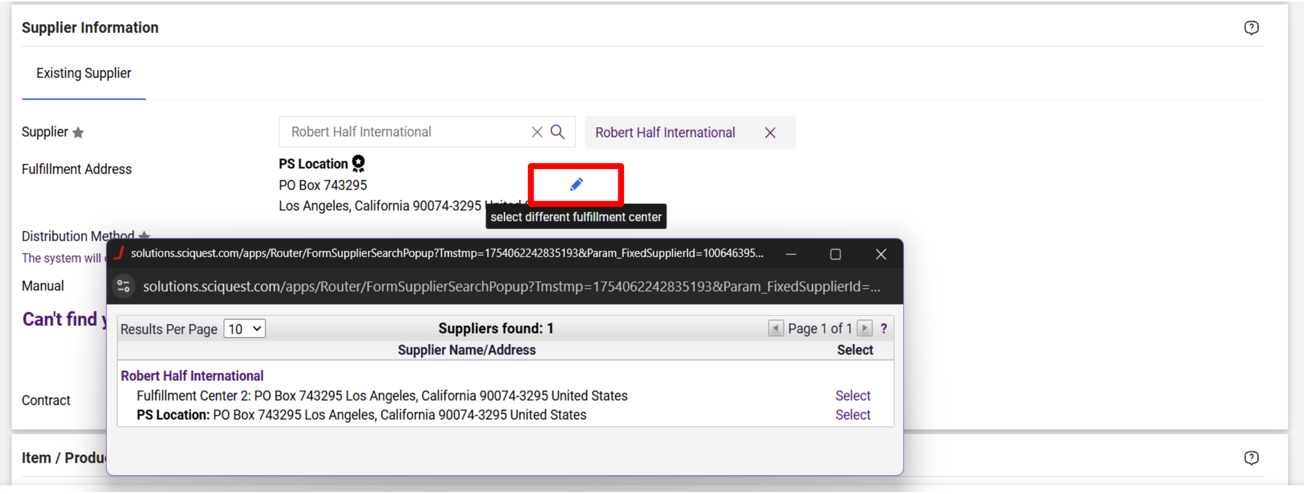


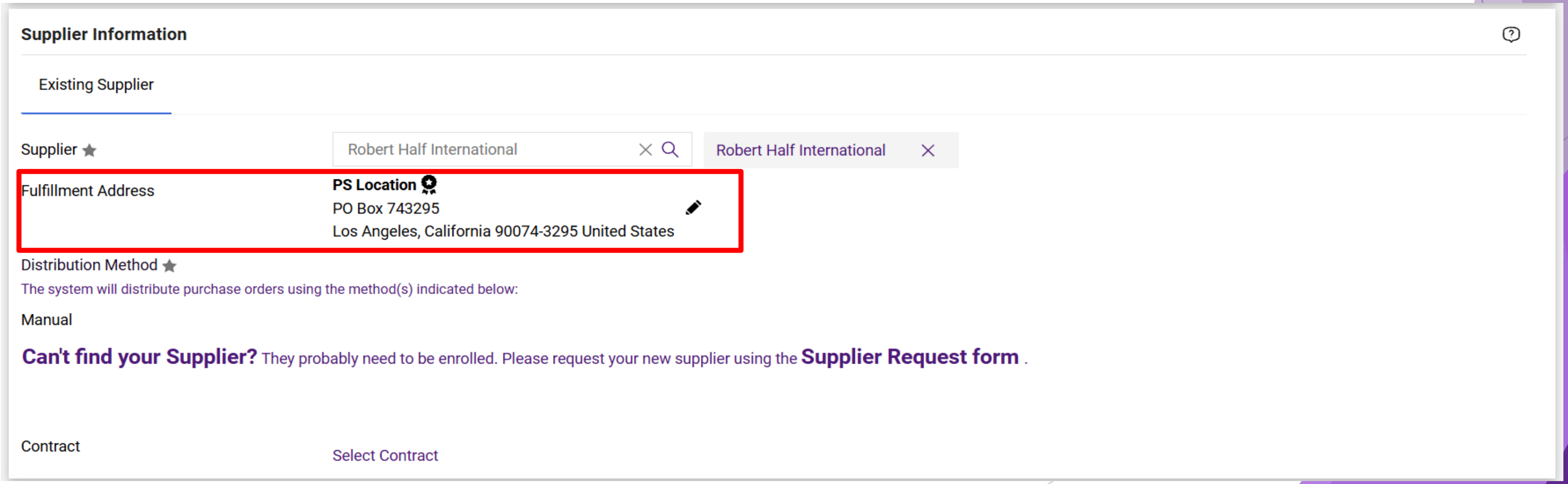
Verify Supplier Address

- 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.



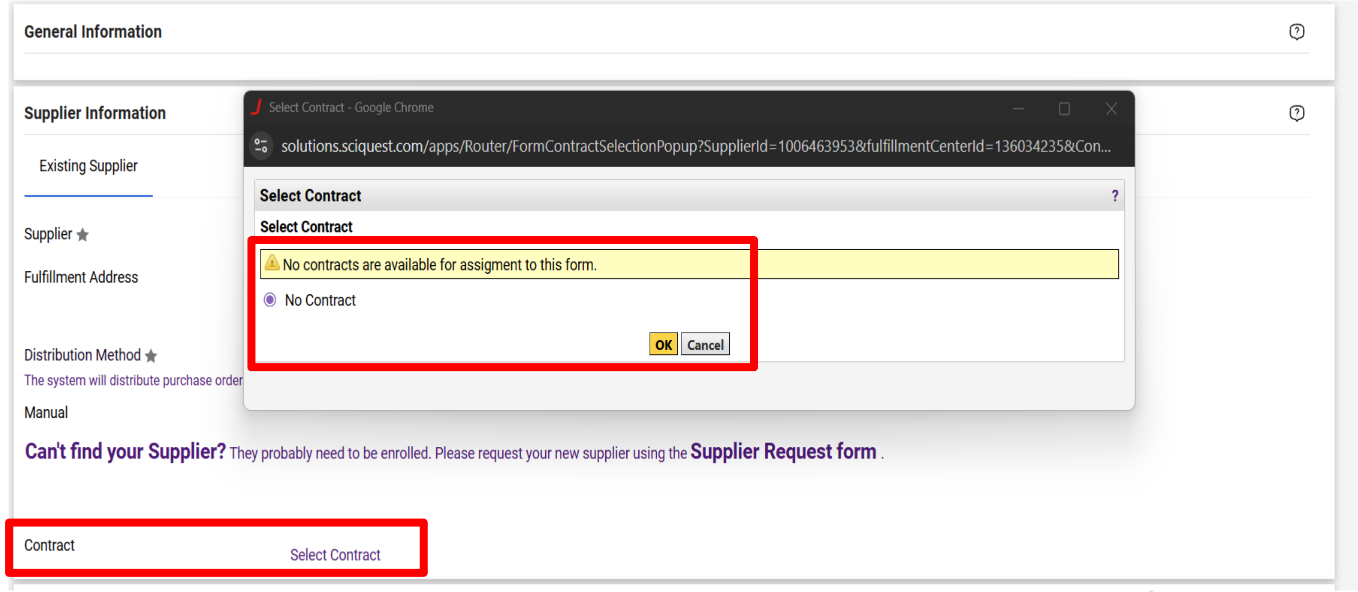
Verify Supplier Address





Associating a Contract

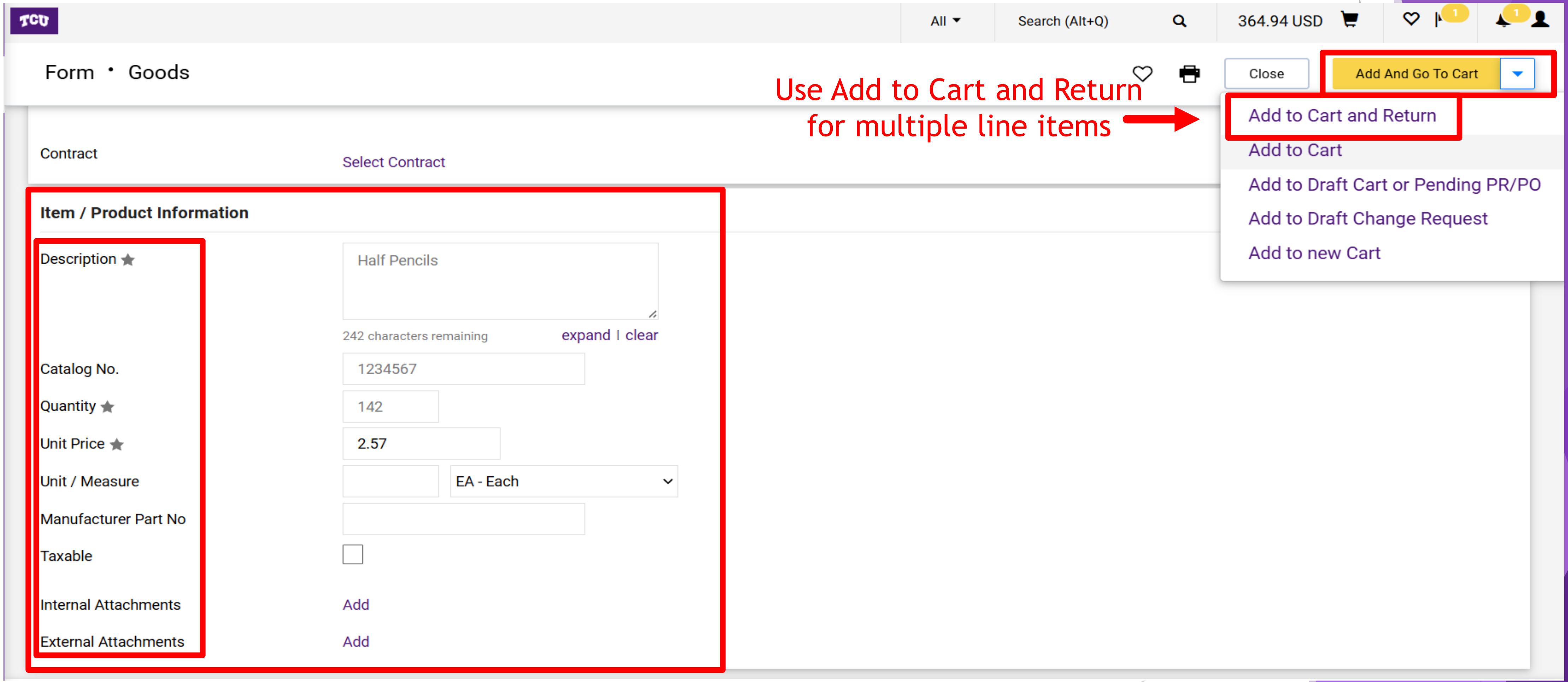
- If a contract has been executed with the supplier, it should be associated with the requisition.
- Use the contract search feature to locate the correct contract record.
- Attaching the contract helps document the terms governing the purchase.



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



Adding Multiple Lines

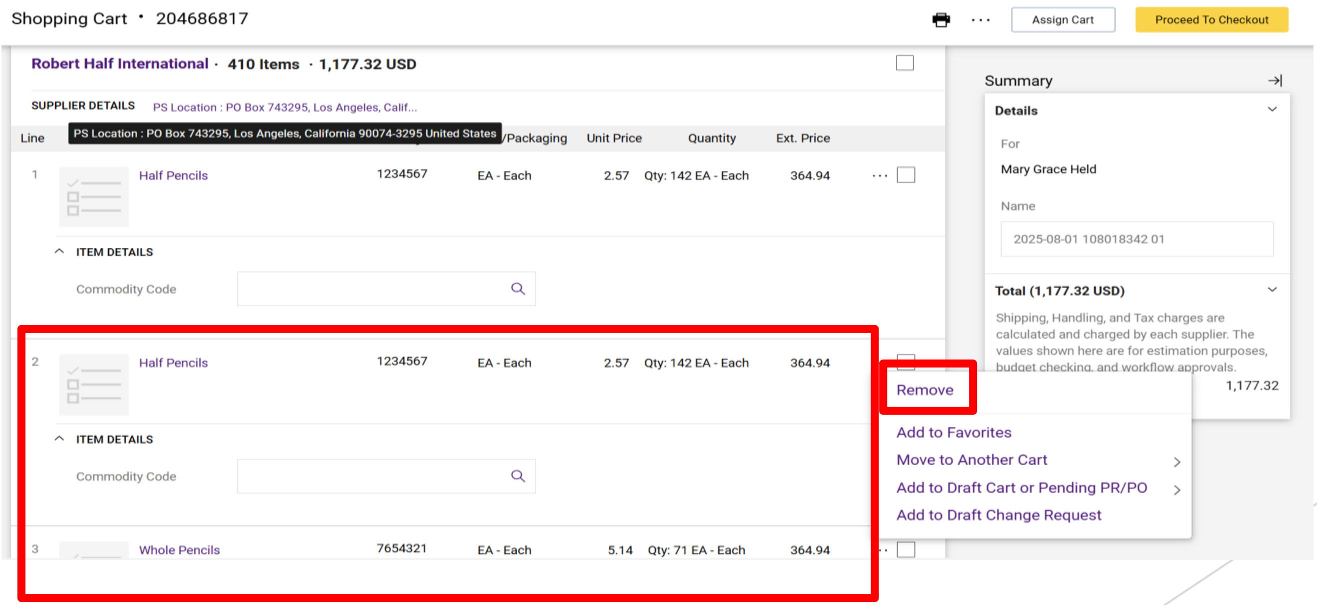
- Each item listed on the supplier quote should be entered as a separate line item.
- After entering a line item, select Add to Cart and Return to continue entering additional items.
- Repeat this process until all items from the supplier quote have been added to the requisition.

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.

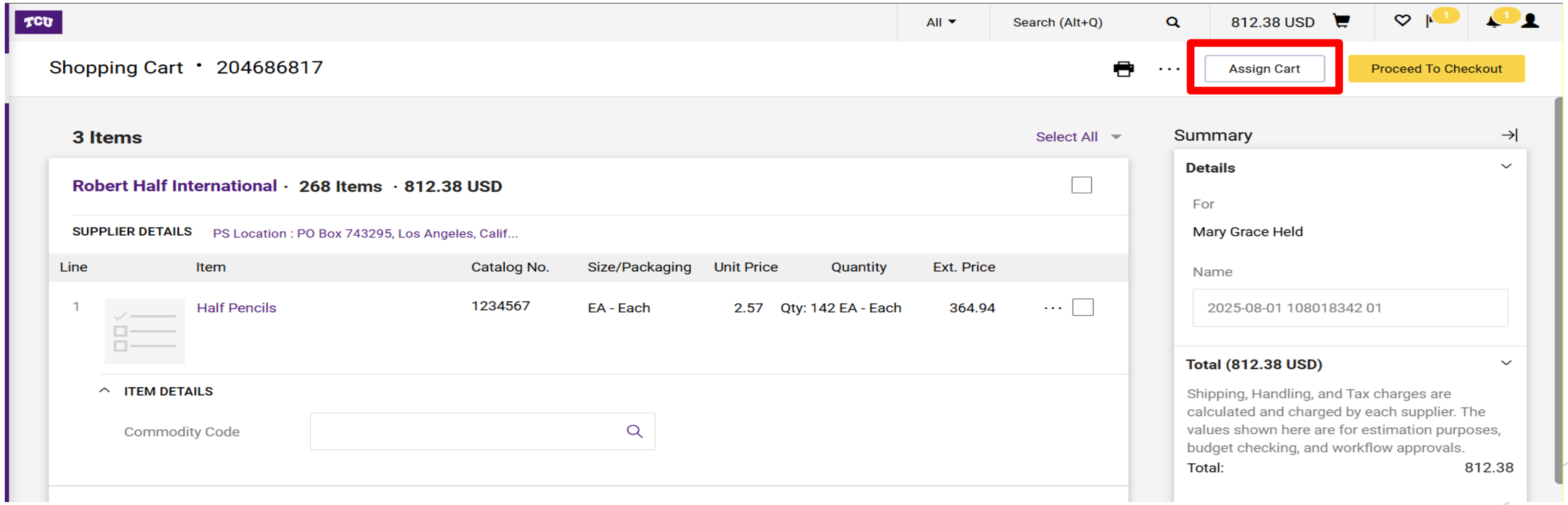
Review Requisition

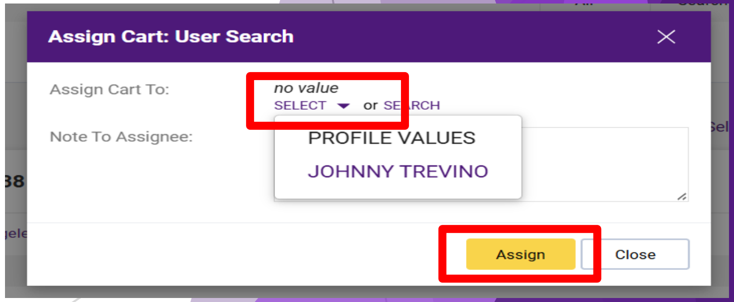
- Review all line items carefully after they have been added to the requisition.
- If a line item needs to be edited or removed, select the three-dot menu associated with that line.
- Verify that the quantities, pricing, and descriptions accurately reflect the supplier quote.



Assigning a Cart

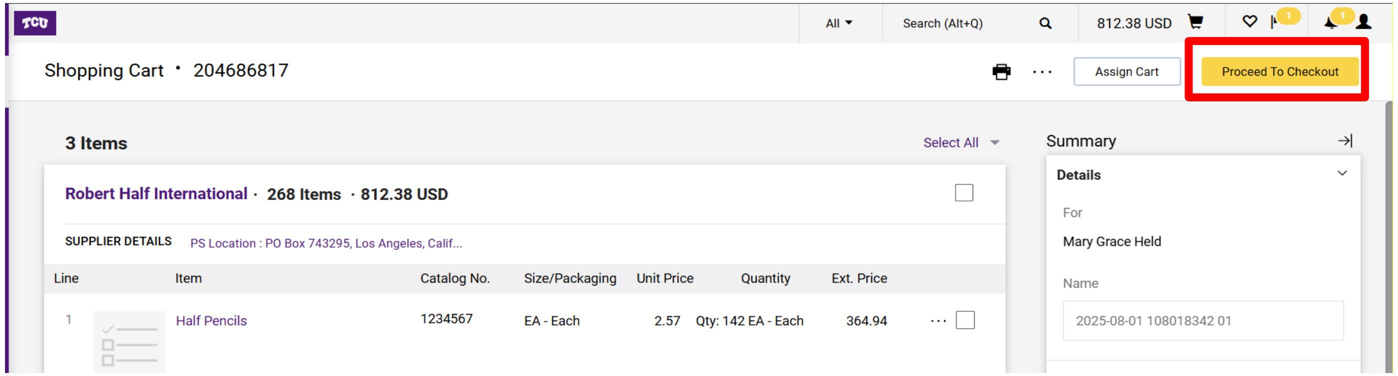
- If you do not have Requester permissions, select Assign Cart to transfer the requisition to an authorized Requester.
- Search for and select the appropriate individual within your department.
- The Requester can then review and submit the requisition on your behalf.





Proceed to Checkout

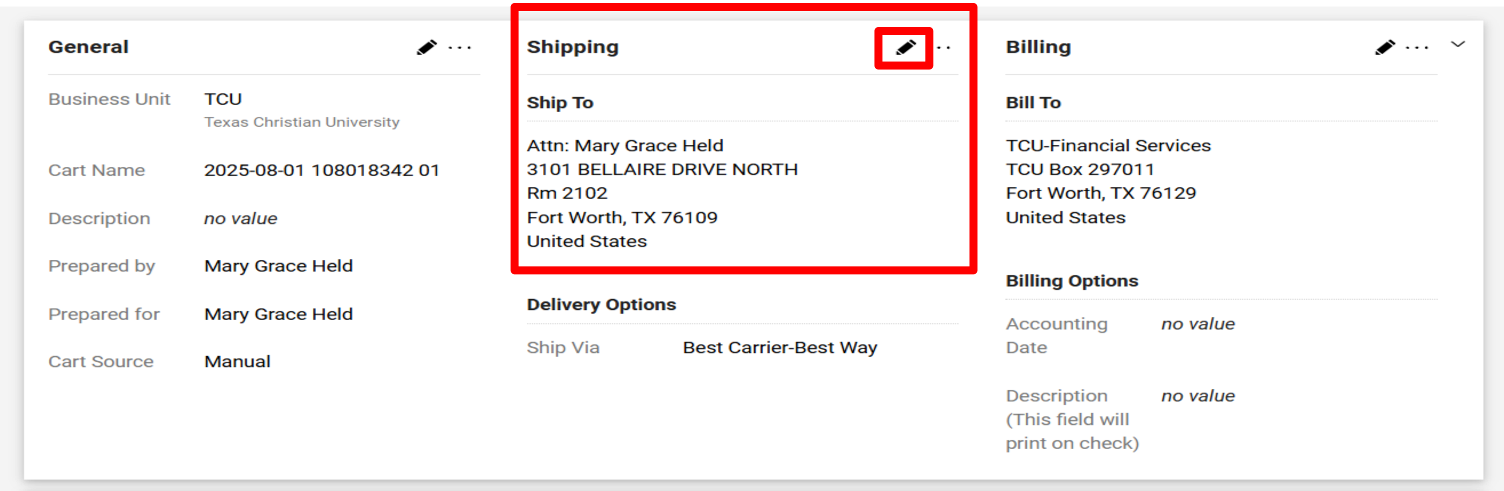
- Any errors displayed within the requisition must be corrected before proceeding.
- Review all validation messages and make any required corrections.
- Once the requisition is ready, select Proceed to Checkout.

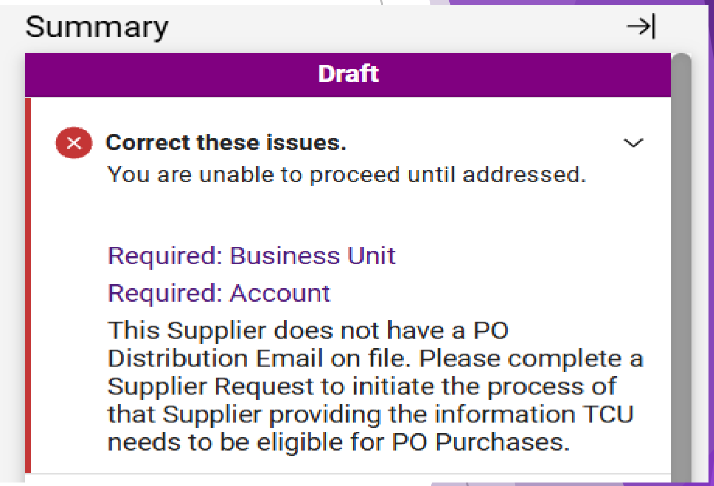


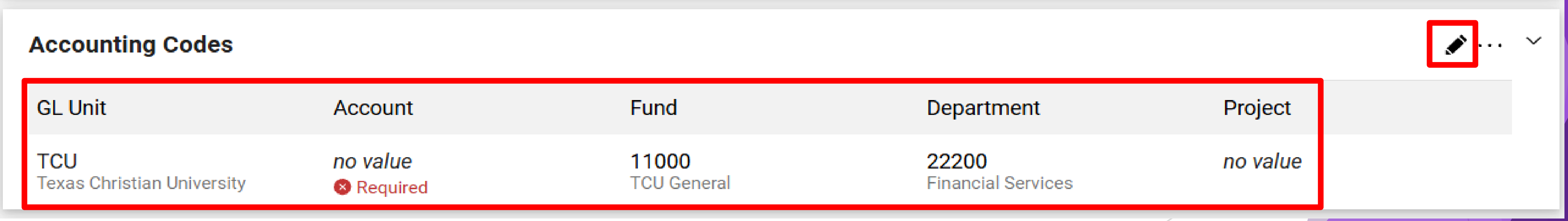
Shipping and Accounting

- 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

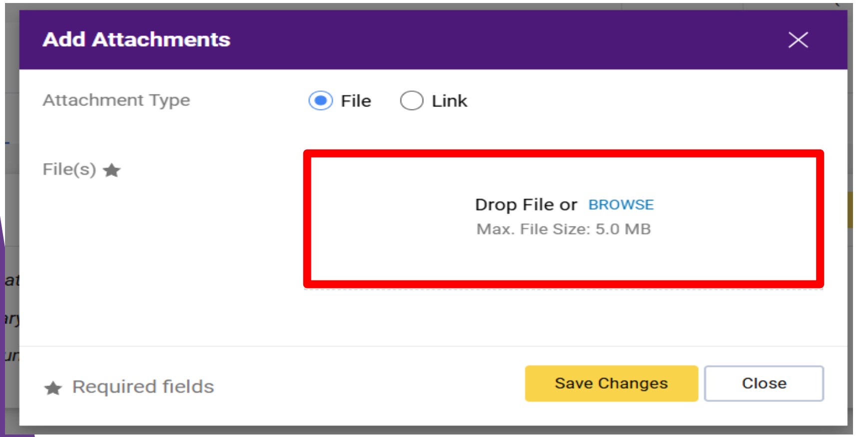


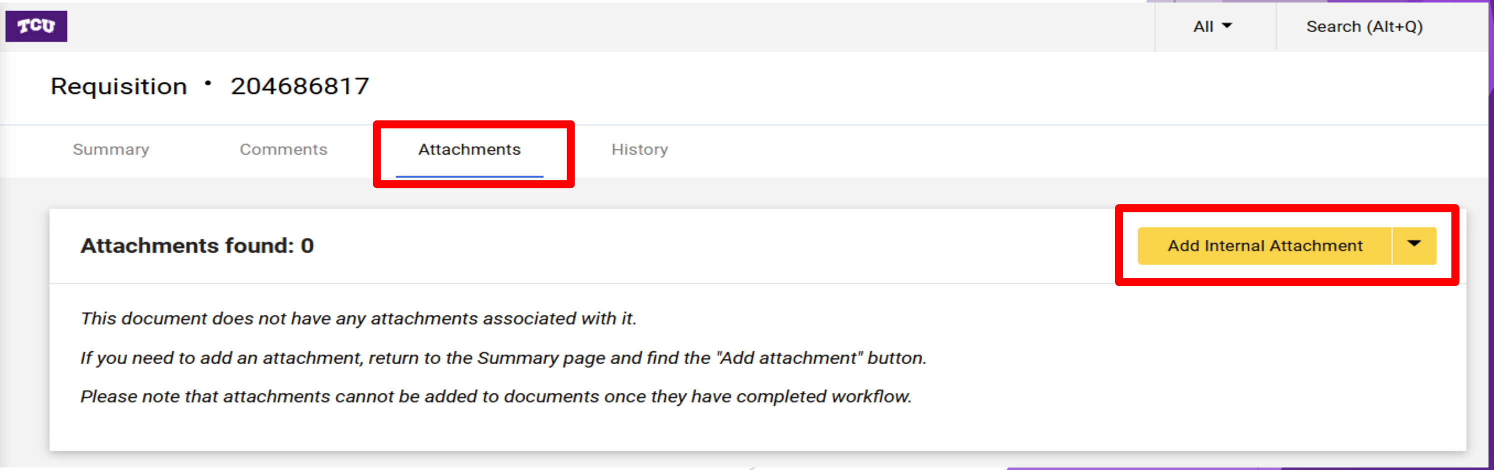




Attachments

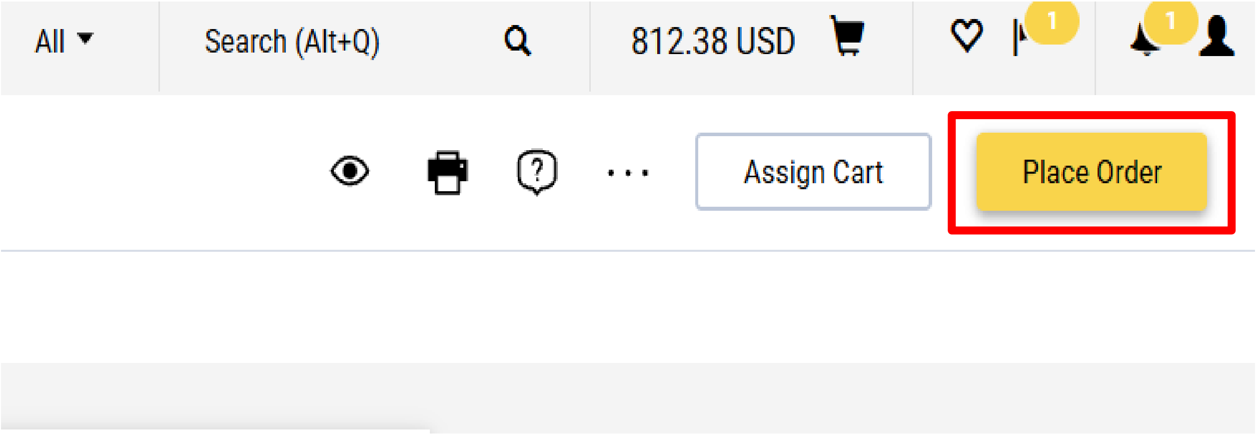
- Every Procurement Form must include supporting documentation.
- Supporting documents may include supplier quotes, proposals, estimates, contracts, or similar records.
- Open the Attachments tab and upload all required documents before submitting the requisition.





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 again your Purchase Order. Review the Manual Invoice Process guide for steps on how to pay an invoice.

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QUESTIONS?

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