

Navigation & Workflow

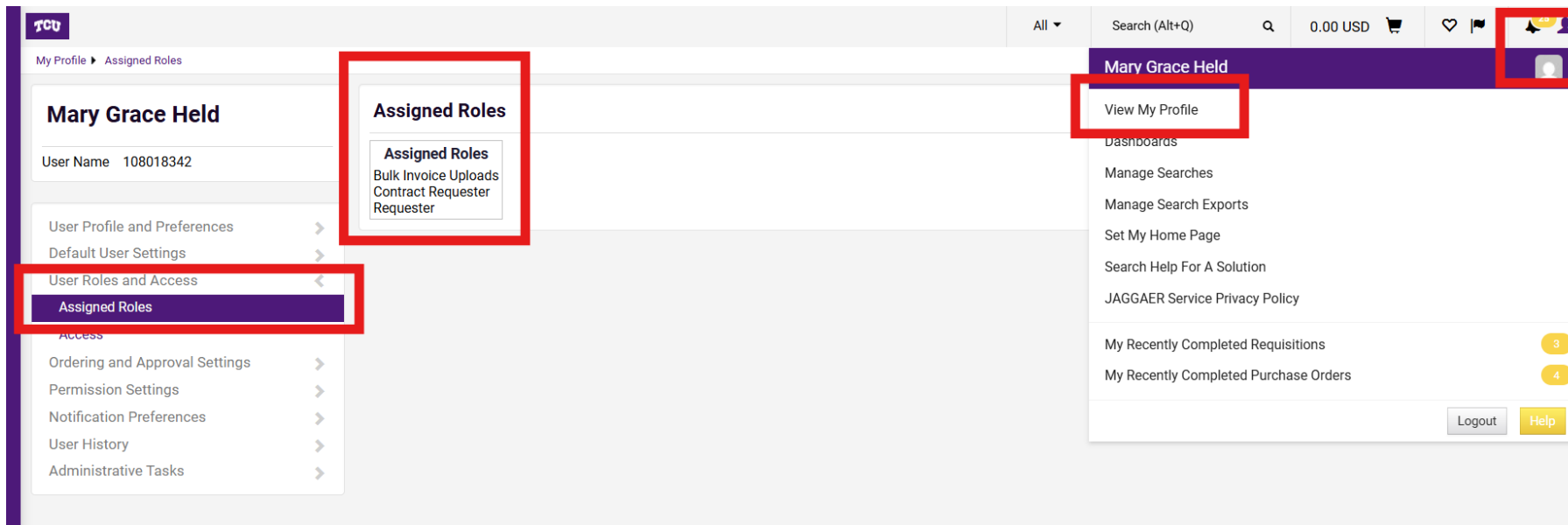
Jaggaer Overview

Guide Overview

- ▶ This guide covers:
 - ▶ How to verify your Jaggaer role
 - ▶ How to locate your Procurement items
 - ▶ Workflow status for items submitted
 - ▶ Associated documents on a requisition, invoice, and/or Purchase Order

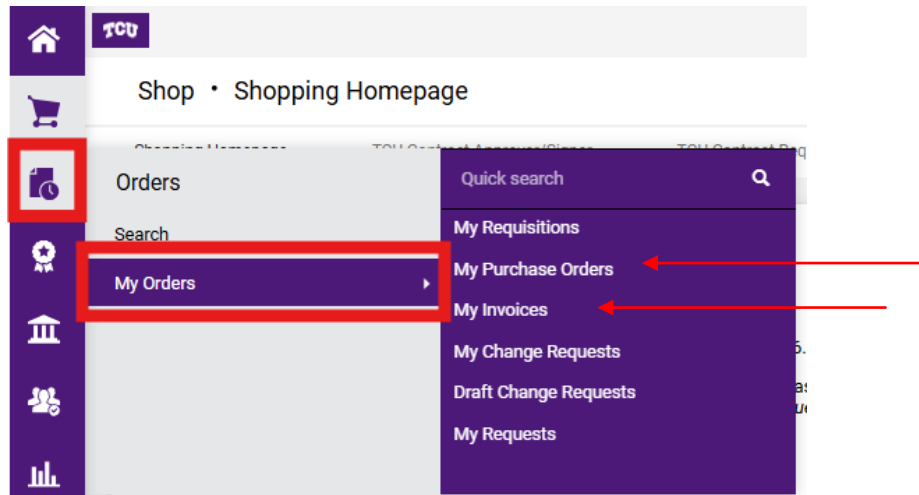
Viewing Your Assigned Rolls

- ▶ View your assigned roles in Jaggaer to verify you are a requester or an approver.
- ▶ Click on the upper-right profile button, select View My Profile, and select Assigned Roles under User Roles and Access.



Finding Your Procurement Documents

- ▶ Select the page icon on the left-hand navigation menu to open My Orders.
- ▶ My Orders contains your purchase orders, invoices, change requests, and draft documents.
- ▶ Use this page as the primary location to locate and manage your procurement activity.



Finding Purchase Orders

- ▶ Open My Purchase Orders to view Purchase Orders you have submitted or have access to.
- ▶ Use the date filter to expand your search beyond the default 90-day view.
- ▶ Search by Purchase Order number or supplier name to quickly locate a specific order.

The screenshot shows the 'My Purchase Orders' interface. A red box highlights the date filter dropdown on the left, which is currently set to 'Last 180 days'. A red arrow points from this dropdown to the 'Created Date: Last 180 days' label at the top of the table. The table displays a list of purchase orders with columns for Created Date/Time, PO Status, Requisition Number, PO Owner, Shipment Status, Matching Status, and Total Amount. The first row shows a PO created on 5/18/2026, completed, with a total amount of 8,460.75 USD. The table is paginated, showing 1-9 of 9 results.

Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
5/18/2026 3:16:02 PM	Completed	215752032	Mary Grace Held	No Shipments	Fully Matched	8,460.75 USD
5/4/2026 1:39:41 PM	Completed	215032709	Mary Grace Held	Sent To Supplier	Fully Matched	19,200.00 USD
4/27/2026 4:27:34 PM	Completed	215284228	Mary Grace Held	No Shipments	Fully Matched	8,411.75 USD
4/6/2026 7:28:34 PM	Completed	214294158	Mary Grace Held	No Shipments	Fully Matched	8,477.75 USD
3/16/2026 7:38:12 AM	Completed	205758233	Mary Grace Held	Sent To Supplier	Partially Matched	54,500.00 USD
2/24/2026 3:27:07 PM	Completed	212331852	Mary Grace Held	No Shipments	Fully Matched	8,495.75 USD
1/16/2026 1:49:04 PM	Completed	210930081	Mary Grace Held	No Shipments	Fully Matched	15,000.00 USD
1/8/2026 8:08:59 AM	Completed	210570413	Mary Grace Held	Sent To Supplier	Partially Matched	50,000.00 USD
1/7/2026 11:17:17 AM	Completed	210649867	Mary Grace Held	Sent To Supplier	Partially Matched	3,300.00 USD

Understanding Matching Status

- ▶ The Matching Status indicates whether supplier invoices have been manually applied to the Purchase Order.
 - ▶ No Match means no invoices have been uploaded.
 - ▶ Partially Matched means invoices have been applied but do not equal the Purchase Order total.
 - ▶ Fully Matched means all invoices equal the total Purchase Order amount.
- ▶ If no additional invoices are expected, completed Purchase Orders should ideally display a Fully Matched status.

Understanding Matching Status

Created Date: Last 180 days ▾ Quick search 🔍 ⓘ Add Filter ▾ Clear All Filters ?

PO Owner: Held, Mary Grace ▾ ✕

1-9 of 9 Results ⚙️ 20 Per Page ▾

...	PO Number ▾	Supplier	Created Date/Time 🕒	PO Status ▾	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount ▾
...	PAY00103644	On Location Parent LLC ⓘ	5/18/2026 3:16:02 PM	Completed	215752032	Mary Grace Held	No Shipments	Fully Matched	8,460.75 USD
...	P00135320	Concur Technologies Inc ⓘ	5/4/2026 1:39:41 PM	Completed	215032709	Mary Grace Held	Sent To Supplier	Fully Matched	19,200.00 USD
...	PAY00101579	On Location Parent LLC ⓘ	4/27/2026 4:27:34 PM	Completed	215284228	Mary Grace Held	No Shipments	Fully Matched	8,411.75 USD
...	PAY00099823	On Location Parent LLC ⓘ	4/6/2026 7:28:34 PM	Completed	214294158	Mary Grace Held	No Shipments	Fully Matched	8,477.75 USD
...	P00128721	Velocity Procurement, LLC ⓘ	3/16/2026 7:38:12 AM	Completed	205758233	Mary Grace Held	Sent To Supplier	Partially Matched	54,500.00 USD
...	PAY00096930	On Location Parent LLC ⓘ	2/24/2026 3:27:07 PM	Completed	212331852	Mary Grace Held	No Shipments	Fully Matched	8,495.75 USD
...	PAY00093939	Tealbook Inc ⓘ	1/16/2026 1:49:04 PM	Completed	210930081	Mary Grace Held	No Shipments	Fully Matched	15,000.00 USD
...	P00120016	Smith Temporaries dba CornerStone Staffing ⓘ	1/8/2026 8:08:59 AM	Completed	210570413	Mary Grace Held	Sent To Supplier	Partially Matched	50,000.00 USD
...	P00119862	Jaggaer LLC ⓘ	1/7/2026 11:17:17 AM	Completed	210649867	Mary Grace Held	Sent To Supplier	Partially Matched	3,300.00 USD

1-9 of 9 Results 20 Per Page ▾

Workflow Status Indicators

- ▶ The status bar in the upper-right corner displays the current workflow status of a Purchase Order or invoice.
 - ▶ **Green** “completed” indicates all workflow steps have finished
 - ▶ **Dark blue** “pending” indicates approvals are still in progress
 - ▶ **Purple** “draft” indicates the document has not been submitted
 - ▶ **Brown or dark orange** “withdrawn” indicates the document has been cancelled by the requestor.
 - ▶ **Red** “cancelled” indicates an approver cancelled it.
- ▶ For completed invoices, payment information such as the voucher number, check number, and payment date is available on the Summary tab under “Payment Information,” when payment has been issued.

Workflow Status Indicators

Summary →|

Draft

Total (21,750.00 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	21,750.00
	21,750.00

Summary →|

Complete

Smith Temporaries dba CornerStone Staffing ▼

Supplier Invoice No. 501857
Invoice Image
[Invoice-501857.pdf](#) ...

Summary →|

Withdrawn

Total (0.00 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	0.00
	0.00

Summary →|

Pending

Total (520.51 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	520.51
	520.51

Payment Information ...

Payment Date	4/16/2026
Re-Issue Date	no value
Pay Status	Paid
Payment Method	Unknown
Check No.	00957565
Payment Note	PS Voucher# 02020901
Description (This field will print on check)	no value

Summary →|

Cancelled

Total (32,000.00 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	32,000.00
	32,000.00

Related Documents

- ▶ The Related Documents section displays all procurement records associated with the transaction, including requisitions, Purchase Orders, and invoices.
- ▶ A JINV represents the invoice payment record that is associated with a Purchase Order and requisition.

Original Requisition
for this PO →

All invoices
paid against
this single
PO →

Summary

Completed

Details

Supplier Status

Sent To Supplier

Supplier

Smith Temporaries dba CornerStone Staffing

Total (50,000.00 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

50,000.00

50,000.00

Related Documents

Requisition: 210570413

Invoice: JINV000149155

Invoice: JINV000146911

Invoice: JINV000140427

Invoice: JINV000145104

Invoice: JINV000151738

Invoice: JINV000149158

Invoice: JINV000142980

Invoice: JINV000146351

Invoice: JINV000145004

View All

What's next?

Workflow Status

Completed

Workflow

Submitted

1/8/2026 8:08 AM

Submitted · 1/8/2026 8:08 AM · Mary Grace Held

Create Vendor Documents

Completed

Send PO to Vendor

Completed

Flag Cost Invoice POs

Completed

PO Export to DC

Completed

Completed

1/8/2026 8:09 AM

Viewing Workflow Approvals

- ▶ The Workflow Steps section displays each approval associated with the document.
- ▶ Completed workflow steps display a check mark.
 - ▶ Selecting a workflow step shown in purple will identify the individual or group responsible for that approval.
 - ▶ Workflow steps displayed in black represent automated system actions and cannot be selected.

The screenshot displays a 'Summary' page for a workflow. At the top, a green bar indicates the status is 'Completed'. Below this, the 'Details' section shows 'Supplier Status', 'Sent To Supplier', and 'Supplier' (Smith Temporaries dba CornerStone Staffing). The 'Total (50,000.00 USD)' section shows a subtotal of 50,000.00. The 'Related Documents' section lists a requisition and several invoices. The 'What's next?' section shows a vertical timeline of workflow steps, all marked as 'Completed'. The final step, 'Completed', is highlighted in purple. A red box highlights the 'What's next?' section, and a red arrow points to the final 'Completed' step with the text 'Current Status is Complete'.

Summary →

Completed

Details ✓

Supplier Status

Sent To Supplier

Supplier

Smith Temporaries dba CornerStone Staffing

Total (50,000.00 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	50,000.00
	50,000.00

Related Documents ✓

Requisition: 210570413

Invoice: JINV000149155

Invoice: JINV000146911

Invoice: JINV000140427

Invoice: JINV000145104

Invoice: JINV000151738

Invoice: JINV000149158

Invoice: JINV000142980

Invoice: JINV000146351

Invoice: JINV000145004

[View All](#)

What's next? ✓

Workflow Status ● Completed

Workflow ...

- Submitted
1/8/2026 8:08 AM
Submitted · 1/8/2026 8:08 AM · Mary Grace Held
- Create Vendor Documents
Completed
- Send PO to Vendor
Completed
- Flag Cost Invoice POs
Completed
- PO Export to DC
Completed
- Completed**
1/8/2026 8:09 AM

Current Status is Complete →

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

Finance & Administration
Office of Procurement

QUESTIONS?

Email

Procurement@tcu.edu

TCU