

Services Purchase Order

Procurement Forms

General Steps

- ▶ Locate the Services Form under Procurement Forms in Jaggaer.
- ▶ Answer the first two questions. Enter the supplier name. Verify the correct address is being used.
- ▶ Enter the lines from the supplier quote and ensure descriptions, pricing, and charges match the supplier documentation.
- ▶ If this PO is for regular monthly billing, one estimated line for services for the Fiscal Year is acceptable.
- ▶ 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?

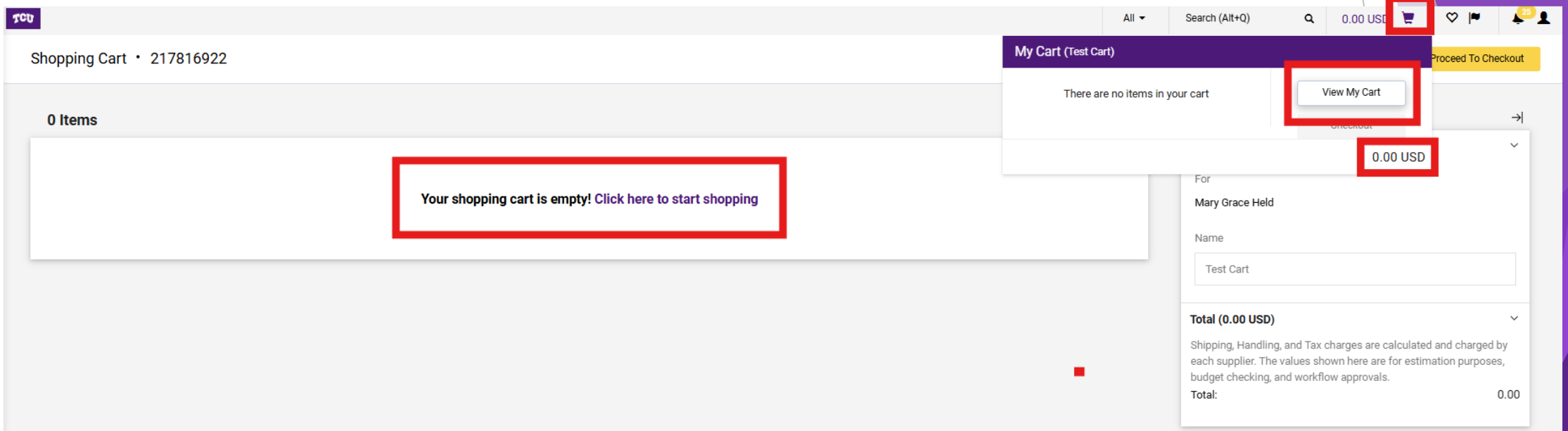
- ▶ Procurement Forms are used to request goods or services that are not available through a Jaggaer Punchout Catalog.
- ▶ Verify the purchase is not exempt from a Purchase Order under Appendix B of the Procurement Policy.
- ▶ A Purchase Order is created from the approved requisition and will be issued to the supplier after approval.
- ▶ *Use the Preferred Services Providers Procurement Form when ordering from a supplier who is on the PSP list.*

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.

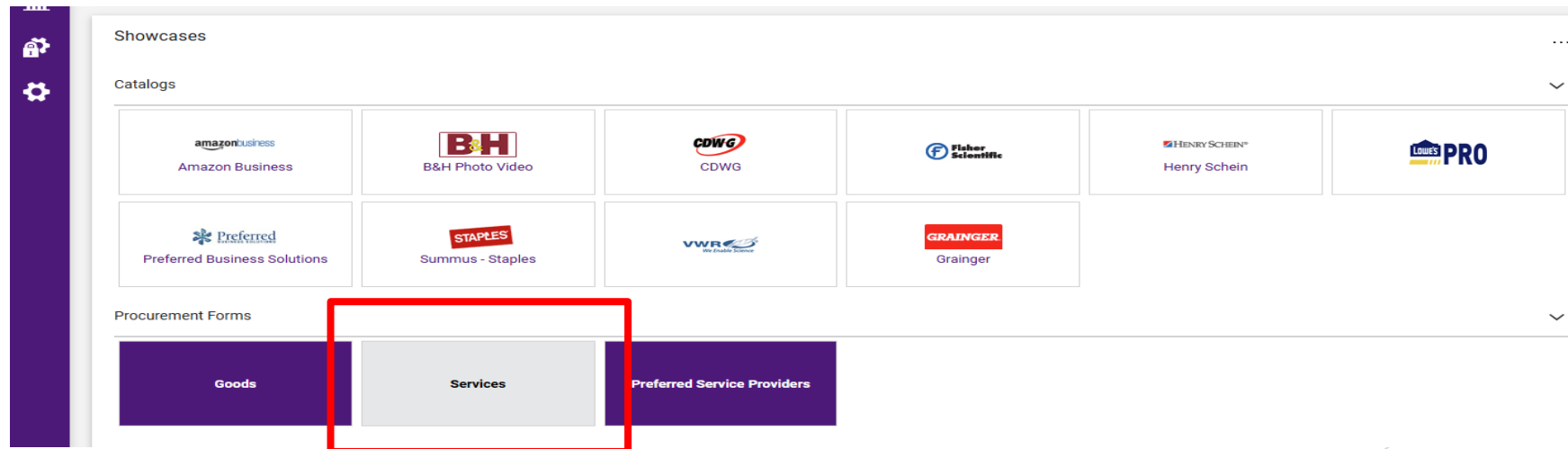
Before You Begin

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



Select Services Form

- ▶ Begin by selecting the Services Form from the Procurement Forms section.
- ▶ This form should be used when purchasing services or items that include services such as custom or branded goods, that are not exempt from a PO under Appendix B of the Procurement Policy.



Complete the Questions

- ▶ Answer the first two questions at the top of the form.
- ▶ Taxation implications are determined based on your answers.
- ▶ Contact your supplier if you do not know the answer to these questions.

Payment Information

Is payment to an international supplier who provided services in the US? ★

Please select... ▼

Is the payment to an international supplier who provided services in the US, and/or an international supplier being paid a royalty or license fee?

Supplier current/former TCU or Brite employee? ★

Please select... ▼

Is the supplier a current or former TCU or BRITE employee (including student workers)?

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 displays the TCU system interface for selecting a supplier. The top navigation bar includes the TCU logo, a dropdown menu set to 'All', a search bar with the placeholder 'Search (Alt+Q)', the currency '0.00 USD', and icons for a shopping cart, a heart, and a notification bell. Below the navigation bar, the page title 'Form • Goods' is shown. 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 ★'. The search bar contains the text 'Select Supplier' and a magnifying glass icon. A red rectangular box highlights the search bar. Below the search bar, there is a link that reads '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.

Supplier Information:

Existing Supplier

Supplier ★

On Location Parent LLC



On Location Parent LLC



Fulfillment Address

Fulfillment Center 1

7920 Beltline Ste 1010

Dallas, Texas 75254 United States



Supplier Phone

+1 214-363-0073

Distribution Method ★

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

Email (HTML Body)

alupton@onlocationexp.com

Can't find your Supplier? They probably need to be enrolled. Please request your

Contract

Select Contract

solutions.sciquest.com/apps/Router/FormSupplierSearchPopup?Tmstmp=1782851373247768&Param_FixedSupplierId=101067006...

solutions.sciquest.com/apps/Router/FormSupplierSearchPopup?Tmstmp=1782851373247768&Param_FixedSupplierId=101067006...

Results Per Page 10

Suppliers found: 1

Supplier Name/Address	Select
On Location Parent LLC	Select
7920 Belt line: 7920 Beltline Ste 1010 Dallas, Texas 75254 United States	Select
Fulfillment Center 1: 7920 Beltline Ste 1010 Dallas, Texas 75254 United States	Select
Fulfillment Center 3: C/O Ireland 2026 7920 Beltline Road Suite 1010 Dallas, Texas 75254 United States	Select

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 'Fulfillment Address'. A 'Contract' field at the bottom is highlighted with a red box.

General Information

Supplier Information

Existing Supplier

Supplier ★

Fulfillment Address

Distribution Method ★

The system will distribute purchase order

Manual

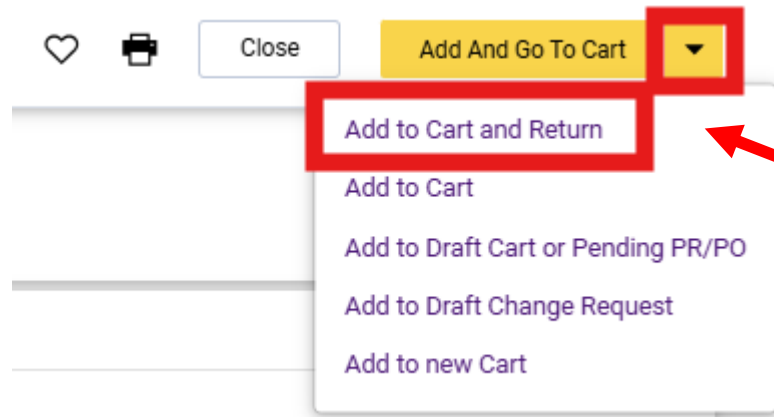
Can't find your Supplier? They probably need to be enrolled. Please request your new supplier using the [Supplier Request form](#).

Contract

Select Contract

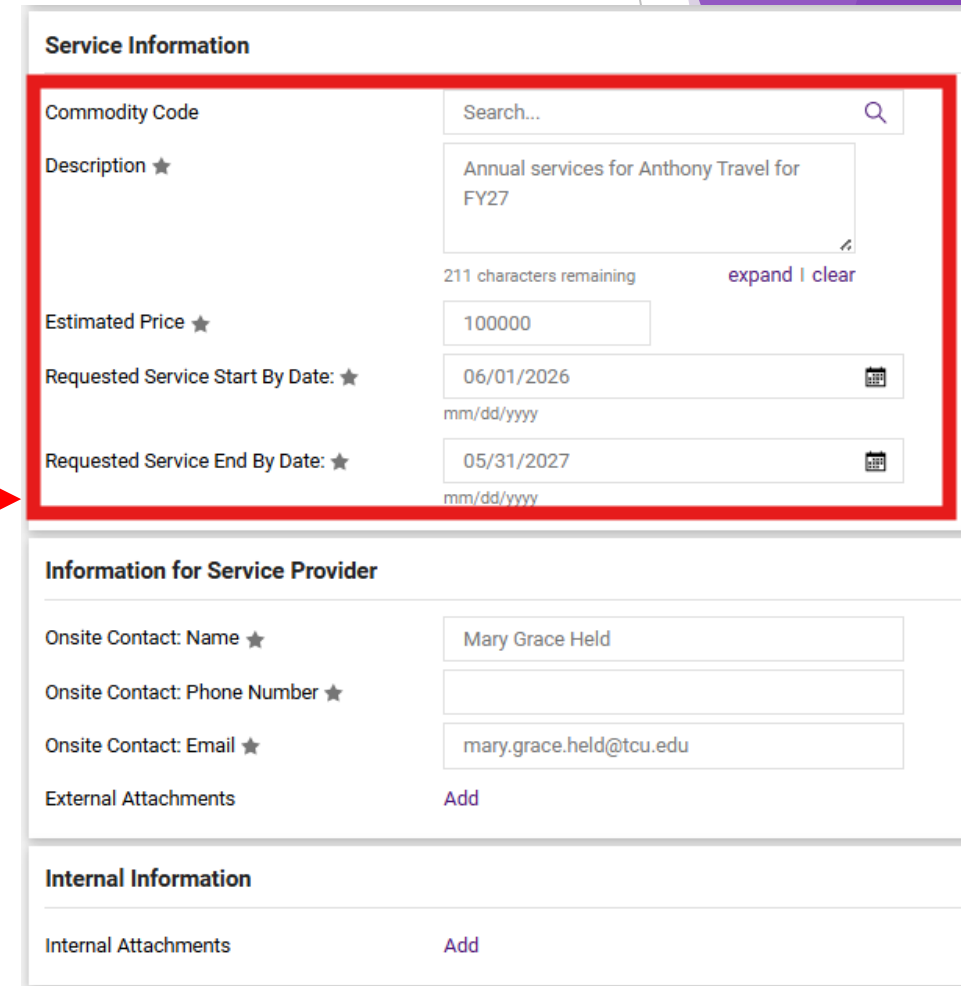
Complete Line Items

- ▶ Enter the information exactly as it appears on the supplier's quote whenever possible.
- ▶ Unlike Goods Purchase Orders, most service purchases are entered as a single service line rather than multiple itemized product lines.
- ▶ Accurate information reduces delays during approval and invoice processing.



A screenshot of a web interface showing a dropdown menu. The menu is open, displaying several options. The option 'Add to Cart and Return' is highlighted with a red box. Above the menu is a yellow button labeled 'Add And Go To Cart' with a small downward arrow icon. To the left of the button are a heart icon and a printer icon. To the right of the button is a 'Close' button. Below the menu, there are several lines of text, including 'Add to Cart', 'Add to Draft Cart or Pending PR/PO', 'Add to Draft Change Request', and 'Add to new Cart'.

Use Add to
Cart and
Return for
multiple
line items



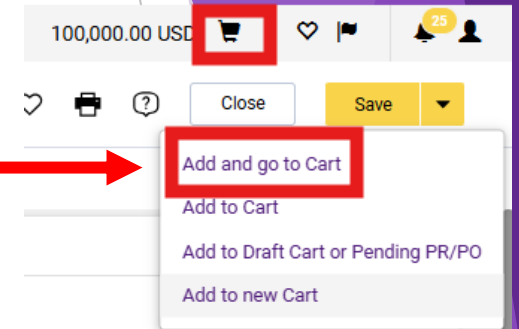
A screenshot of a 'Service Information' form. The form is divided into two main sections. The top section, titled 'Service Information', is enclosed in a red border. It contains fields for 'Commodity Code' (with a search bar), 'Description' (with a star icon), 'Estimated Price' (with a star icon), 'Requested Service Start By Date' (with a star icon and a calendar icon), and 'Requested Service End By Date' (with a star icon and a calendar icon). The bottom section, titled 'Information for Service Provider', contains fields for 'Onsite Contact: Name' (with a star icon), 'Onsite Contact: Phone Number' (with a star icon), 'Onsite Contact: Email' (with a star icon), and 'External Attachments' (with an 'Add' button). Below this is an 'Internal Information' section with an 'Internal Attachments' field and an 'Add' button.

Recurring Services

- ▶ For recurring services, such as temporary staffing or maintenance agreements, consider estimating the Purchase Order amount slightly higher than anticipated usage.
- ▶ This can reduce the need for a future Change Request if additional invoices are received during the service period.

Review Requisition

- ▶ When you have added all the line items you need, Go to Cart. 
- ▶ 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 dots.
- ▶ Verify that the quantities, pricing, and descriptions accurately reflect the quote.



1 Item Select All

On Location Parent LLC · 1 Item · 100,000.00 USD

SUPPLIER DETAILS Fulfillment Center 1 : 7920 Beltline Ste 1010, ...

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
❗ The form is incomplete or has errors. Open the form and correct the errors.						
1	 Annual services for Anthony Travel for FY27			100,000.00	Qty: 1	100,000.00

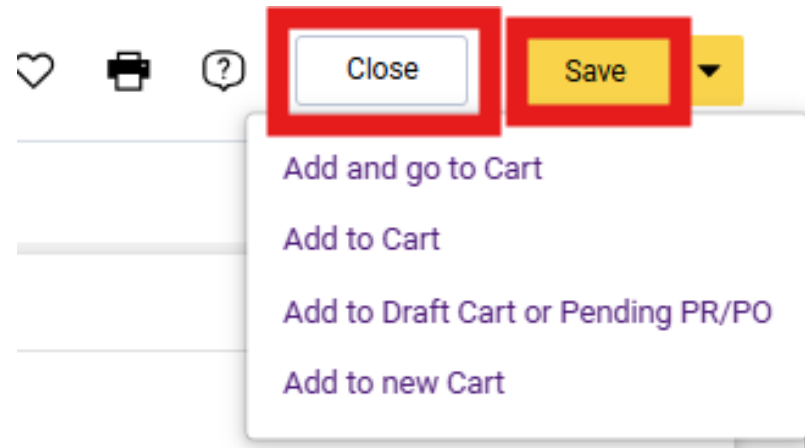
ITEM DETAILS 

Commodity Code



Return to Cart

- ▶ If you have to make adjustments to a line item, select Save when you have made the necessary adjustments.
- ▶ Click Close to return to your cart without adding a new, duplicate, line item.



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.

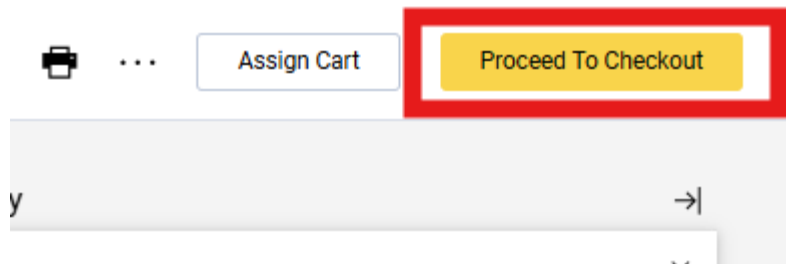
Assign Cart To: no value SELECT or SEARCH

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

Requisition • 217816922



Assign Cart

Place Order

Summary

Comments

Attachments

History

General

Business Unit

TCU

Texas Christian University

Cart Name

Test Cart

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 (This field will print on check)

no value

Accounting Codes

GL Unit	Account	Fund	Department	Project
TCU Texas Christian University	6430 Supplies	11000 TCU General	22200 Financial Services	no value

Facilities

Work Order #	Phase	Shop	Warehouse	Bin	PO Code
no value	no value	no value	no value	no value	no value

Internal Notes and Attachments

External Notes and Attachments

Summary

Draft

Total (100,000.00 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

100,000.00

100,000.00

What's next for my order?

Next Step

Central Procurement Approval

Approver

Kennon, Cheryl

Workflow

Draft

Active

Mary Grace Held

Central Procurement Approval

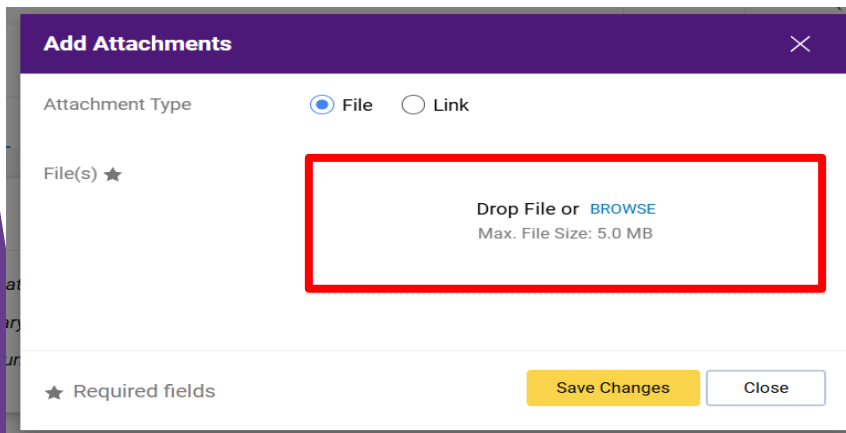
Future

Level 1 Approval

Future

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.



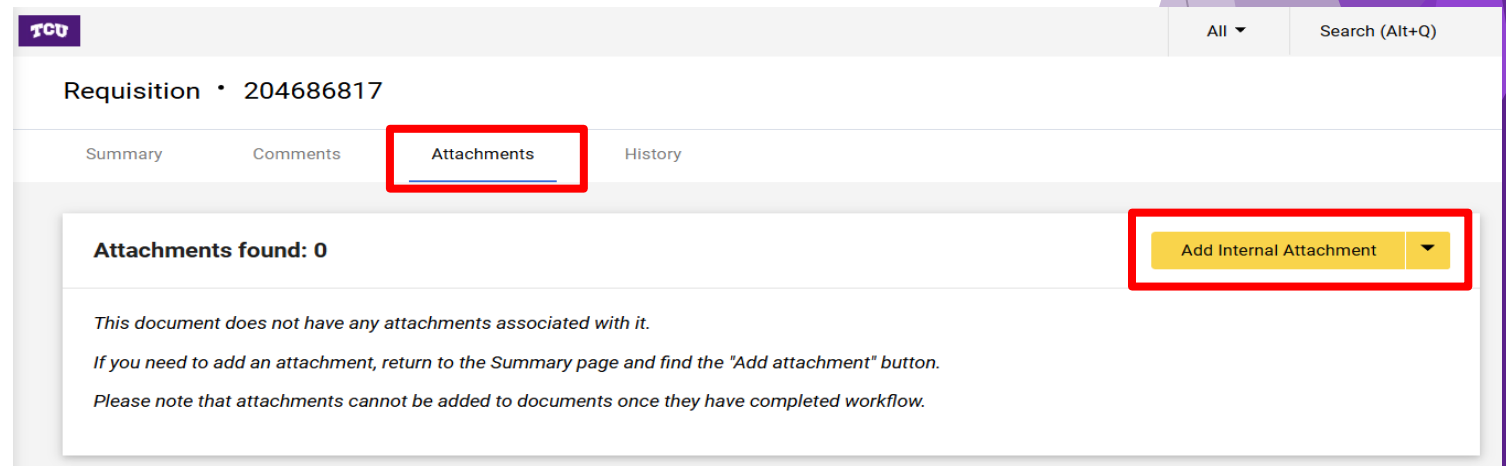
Add Attachments

Attachment Type ☒ File ☐ Link

File(s) ★

Drop File or [BROWSE](#)
Max. File Size: 5.0 MB

★ Required fields Save Changes Close



TCU

All Search (Alt+Q)

Requisition • 204686817

Summary Comments **Attachments** History

Attachments found: 0

Add Internal Attachment

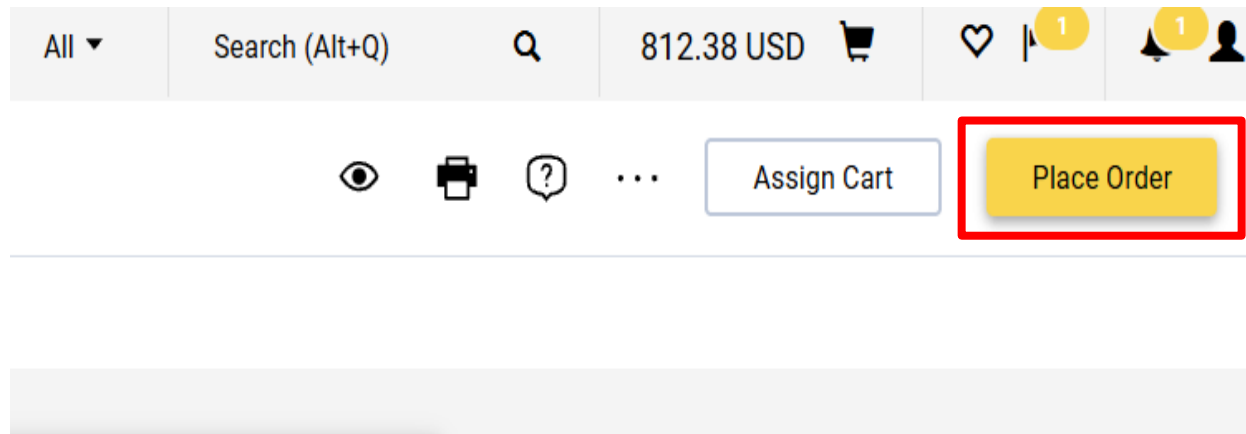
This document does not have any attachments associated with it.

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.

Click on Purple steps to view specific individuals. Blank workflow items are automated and cannot be expanded.

The screenshot displays the 'Approval Workflow' interface. At the top, a 'Summary' section shows the status as 'Draft'. Below this, a 'Total (100,000.00 USD)' is listed. A note states: '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.' A 'Subtotal' of 100,000.00 is shown. The 'What's next for my order?' section indicates the 'Next Step' is 'Central Procurement Approval' and the 'Approver' is 'Kennon, Cheryl'. The 'Workflow' section shows a sequence of steps: 'Draft' (Active, Mary Grace Held), 'Central Procurement Approval' (Future), 'Non-Catalog Procurement Review - Not Facilities' (Cheryl Kennon, c.kennon@tcu.edu), and 'Level 1 Approval' (Future). A red arrow points to the 'Central Procurement Approval' step.

Summary →

Draft

Total (100,000.00 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 100,000.00

100,000.00

What's next for my order?

Next Step Central Procurement Approval

Approver Kennon, Cheryl

Workflow ...

Draft
Active
Mary Grace Held

Central Procurement Approval
Future

Non-Catalog Procurement Review - Not Facilities
Cheryl Kennon
c.kennon@tcu.edu

Level 1 Approval
Future

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.

Finance & Administration
Office of Procurement

QUESTIONS?

Email

Procurement@tcu.edu

TCU