

Jaggaer Training Manual

Last updated 10/13/2022

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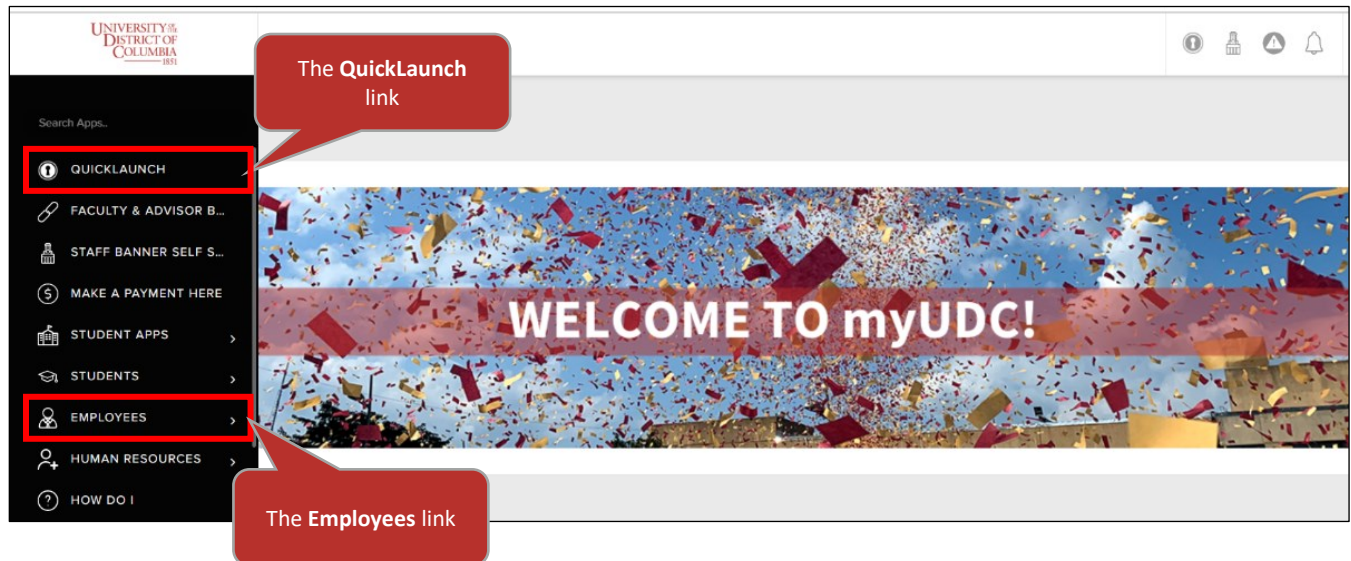
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Overview of Jaggaer

Access

Jaggaer is a cloud-based sourcing and procurement tool that is used to manage all spending within UDC. You may access Jaggaer from the **QuickLaunch** or the **Employees** menu from within myUDC.



Key Definitions

SYSTEM DOCUMENTS

SHOPPING ITEMS

Cart A cart holds details about the items(s) or services that you would like to order. Carts are draft entities; they don't become actual orders until they are submitted. Once the cart has been submitted, it becomes a Purchase Requisition (PR).

Purchase Requisition Requisitions are referred to as Purchase Requisitions or PR's. PR's in **(PR) JAGGAER** have an approval process (or workflow) that requires that the PR be reviewed / approved. *Once a Purchase Requisition is fully approved and complete, it becomes a Purchase Order*

Purchase Order (PO) A Purchase Order is a binding contract to purchase goods or services. PO's are distributed to Suppliers in **JAGGAER** via cXML, Fax or email.

Invoice Invoices in **JAGGAER** are based on PO purchases. Invoices are subject to tolerance requirements related to the PO and Receipt. *Once an Invoice is fully approved and complete, it will be marked as "Ok to Pay" and exported to the Banner for payment.*

Non-Catalog Items A non-catalog order indicates the item is not available via a Hosted catalog or Punch-out catalog. **JAGGAER** has no pricing for the item being requested and it is the User's responsibility to accurately describe and price the item.

Punch-out From **JAGGAER**, you can click on "links" (the Supplier logo) to go to a Supplier's site to shop. This experience is very similar to shopping directly from a Supplier's website except that the vendor typically tailors the external catalog to items/prices specific to UDC. After shopping from a vendor punch-out, the items are returned to the **JAGGAER** cart.

Forms On **JAGGAER** a form is merely an “electronic” version of a paper form, which can be filled out, added to a Cart and submitted. It can have fields that are required and can also have attachments.

Hosted Hosted catalogs are an electronic form of a vendor’s printed catalog. Vendors provide UDC specific items and pricing which is loaded into **JAGGAER** where it can be viewed by Users.

This is the “default” role for all Users. Requesters can access Shopping Items,

Requester add them to their Cart and submit or assign their Carts for processing.

JAGGAER will have several types of Approvers for the following areas;

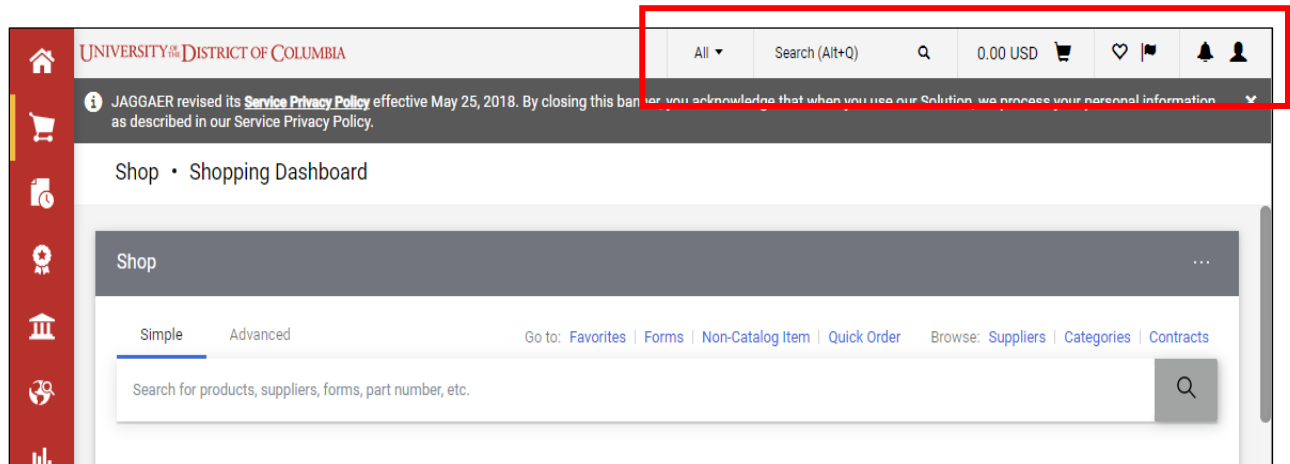
Approver(s) Division/Branch, Budgeting, Procurement, Commission, etc. Approvers will approve Purchase Requisitions based on specific criteria that has been determined for routing the Requisition.

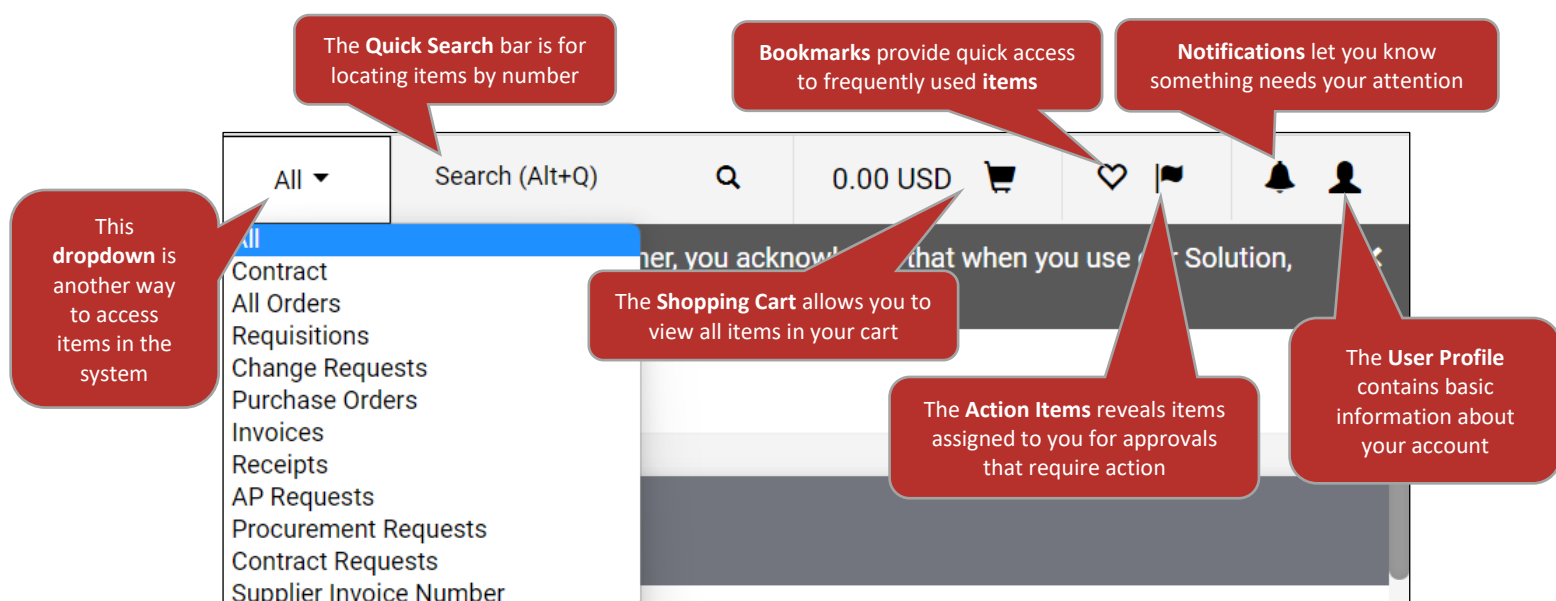
Navigation

There are two main navigation menus within Jaggaer: Top and Side. This section will provide an overview of each menu.

Top Navigation Menu

The top navigation menu is located on the top, right side of the Home Page (or Dashboard). Below is a snapshot of the features available within this navigation menu.



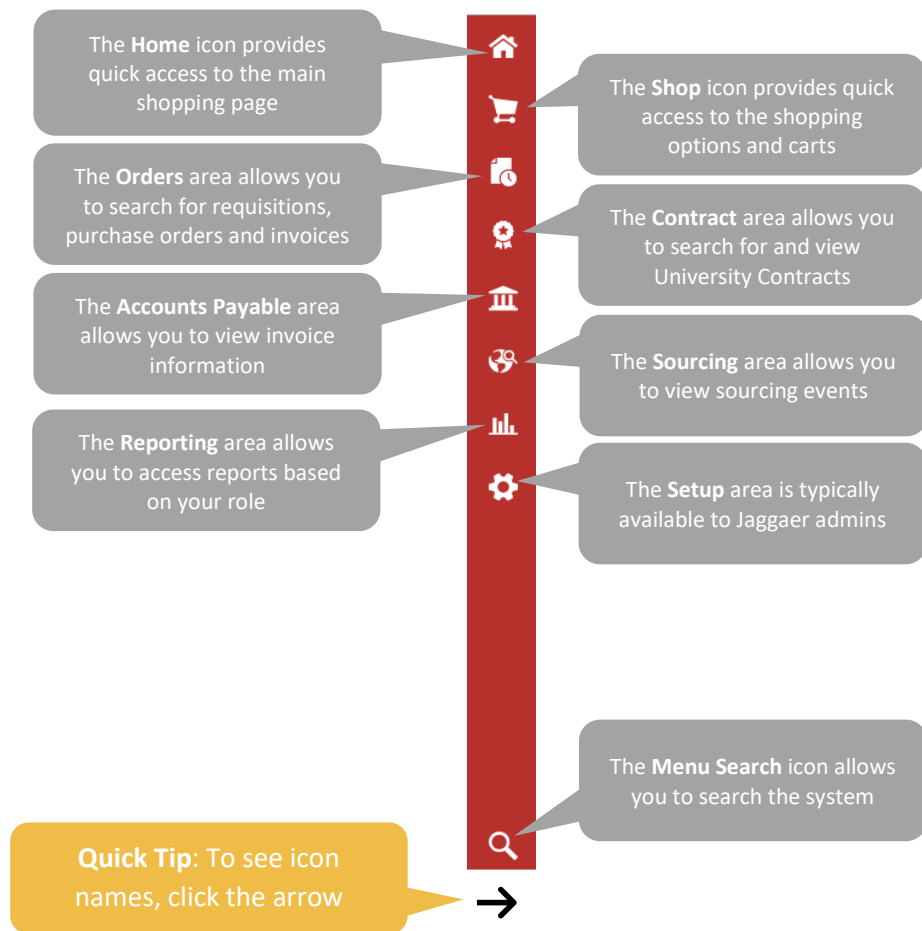


Items in the top navigation menu include the following:











Icon	Name	Description
	Quick Search	The quick search allows you to search for a PO#, RQ#, Invoice#, or a user. The quick-key access combination is ALT + Q .
	Bookmarks	Bookmarks allow you to access frequently used sections of the system quickly. You may add, remove, or modify bookmarks as you deem necessary. The quick-key access combination is ALT + K .
	Notifications	Notifications inform you of items that need your attention. The notifications that you have enabled in your user profile will show up in this area.
	Shopping Cart	The shopping cart contains items that you have selected to purchase. You can add or remove items, adjust quantities, and view an estimated total purchase amount.
	Action Items	Action items are assigned to you for approvals. These tasks require some form of action from you. A number will display with the action item icon if applicable.
	User Profile	The user profile contains basic information about your account. You can add or update your information (including language and time zone), gain quick access to your dashboard, view your recent orders, manage your searches, and/or set your desired home page.

Side Navigation Menu

The side navigation menu is located on the left-hand side of the Home Page (or Dashboard). Below is a snapshot of the menu and the times that can be processed using this feature.



Items in the side navigation menu include the following:

Icon	Name	Description
	Home	Selecting the home icon will take you back to your Jaggaer homepage. By default, this will be your shopping dashboard.
	Shop	The shop area allows you to complete quick searches, view the shopping page, access forms and bookmarks, view non-catalog items and place orders. The quick-key access combination is ALT + P .
	Orders	The orders area allows you to access requisitions, purchase orders, change requests, procurement requests, invoices, and receipts.
	Contracts	The contracts area allows you to search and view university contracts, approvals, reports, and requests.
	Accounts Payable	The accounts payable area contains all tasks related to invoicing, receipts, and any other AP forms and documents.
	Sourcing	The sourcing area contains tasks related to creating and management sourcing events. Note: sourcing events are the vendor-facing part of a Sourcing Project.
	Reporting	All reports available to you will be listed in the reporting area.
	Setup	The setup area is designed for tasks related to the configuration and administration of Jaggaer. All users will not have access to this area. If you feel you need access, contact the Office of Contracting and Procurement (OCP)
	Menu Search	The menu search area is a keyword search feature that returns a list of pages containing your entered keywords. Search results are clickable. The quick-key access combination is ALT + M .
	Arrow	Select the arrow to view the actual icon name next to each icon.

Dashboard

The dashboard is a central location for the various items you will use in Jaggaer. The dashboard contains widgets, which provide you direct access to UDC sourcing activities in the system. Included within your dashboard are system messages as well as widgets for UDC messages, requisitions, suppliers, forms, and draft cart items.

The screenshot shows the Jaggaer dashboard interface. A red sidebar on the left contains navigation icons. The main content area includes several widgets. Callouts in red speech bubbles provide descriptions for these widgets:

- The Organization Message area displays useful information for users**: Points to a banner at the top that reads "Welcome to the University of the District of Columbia E-Procurement Site."
- The System Message area displays useful information about the Jaggaer system**: Points to a small message box in the top right corner.
- The My Requisitions area provides quick access to your specific requisitions**: Points to a widget titled "My Requisitions" which currently shows "There are no Requisitions to display."
- The Showcased Suppliers area shows titles of suppliers that have a catalog setup**: Points to a widget titled "Showcased Suppliers" displaying logos for Dell, 4imprint, COWI, Fisher Scientific, GLOBAL, MASTER-CARR, MCK, and PerkinElmer.
- The Forms area provides quick access to commonly used forms**: Points to a widget titled "Forms" containing links for "Blanket Order - Goods Only", "Blanket Order - Services Only", and "Quick Quote Request".
- The My Draft Carts area provides quick access to draft cart items**: Points to a widget titled "My Draft Carts" at the bottom, which shows a table with columns for NUMBER, CART, CART TYPE, DATE, and TOTAL.

Widget	Description
System Messages	System messages are used to communicate important Jaggaer system related information such as system downtime.
Organization Messages	Organizational messages are used to communicate important UDC purchasing and finance information such as fiscal year closing.
Showcased Suppliers	The Showcased Suppliers widget displays the UDC approved suppliers that have an established PunchOut with UDC.
My Requisitions	The My Requisitions widget provides access to your specific requisitions.
Forms	The Forms widget provides quick access to all commonly used UDC procurement-related forms. If you need access to a form that is not listed, contact OCP.
My Draft Carts	The My Draft Carts widget provides quick access to all current cart items that have not yet been submitted for review or approval.

Roles

There are two primary roles within the UDC Jaggaer system. Each is intended to make adherence to university policy easier. Roles are assigned by the UDC Jaggaer Administrators. You can request changes to your access by contacting the OCP at procurement@udc.edu.

Role	Description
Requester	All UDC Jaggaer users are considered requesters. As a requester, you can search and add items to your cart, assign your cart to others to review, and place requisitions. Prior to submitting a requisition, you are expected to review and ensure the accounting attributes of the order are correct. This may include (but may not be limited to) accounting, chart fields, shipping information, and business purpose.
Approver	The approver is responsible for reviewing and approving purchase orders or requisitions on behalf of the funding department. They review both the budget and procurement areas prior to approval. Approvers can take the following actions: approve, return/reject requisitions, or put requisitions on hold. However, approvers do not have the ability to approve their own request.

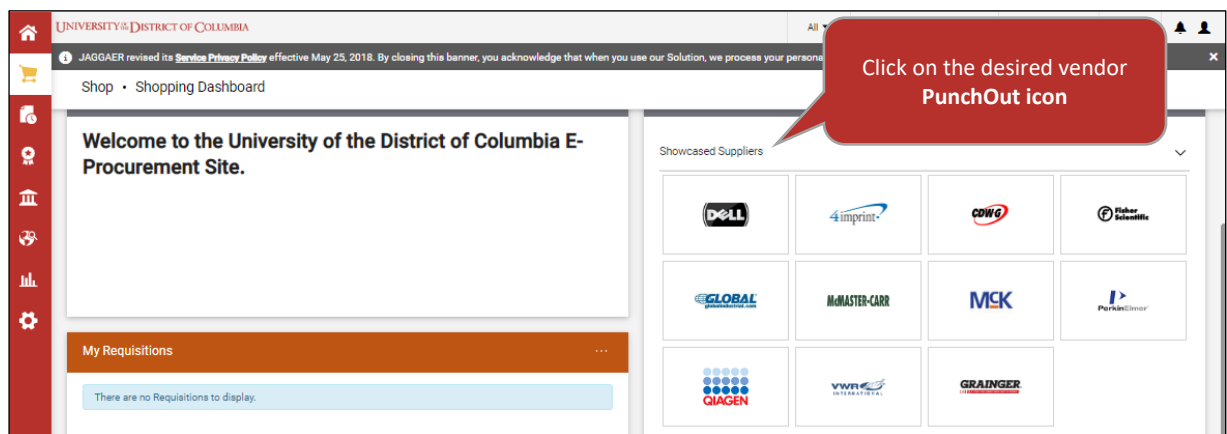
Shopping

PunchOut Catalog Item

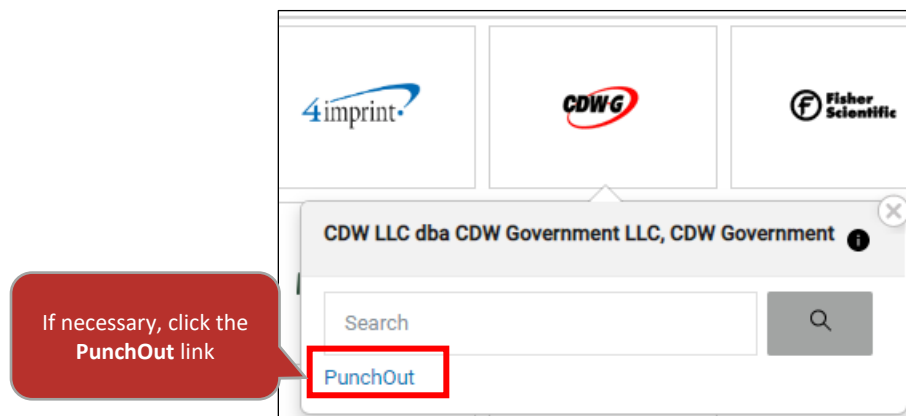
The PunchOut catalog allows you to *punchout* and shop within an approved UDC supplier website, while completing your checkout and approval process from within Jaggaer. *Note: In order to successfully access the UDC supplier website, you may have to disable your pop-up blocker.*

Follow the steps below to place an order from a PunchOut supplier:

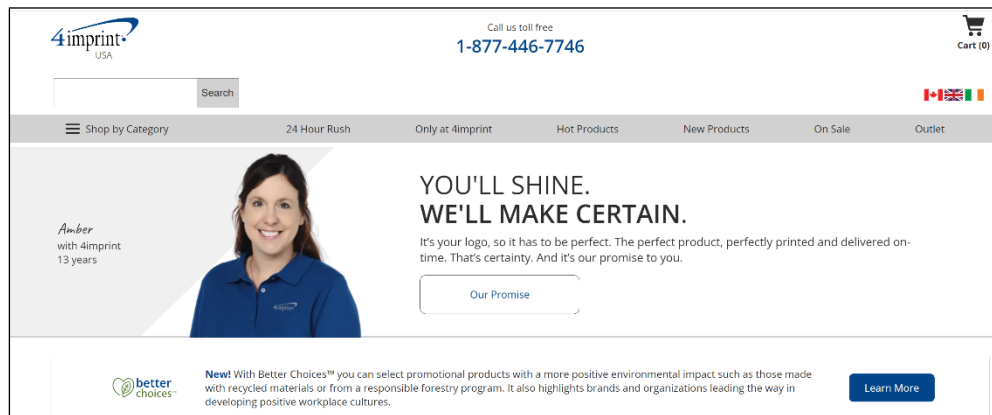
1. On the Jaggaer homepage, click on your desired vendor's **PunchOut icon** in the **Showcased Suppliers** area.



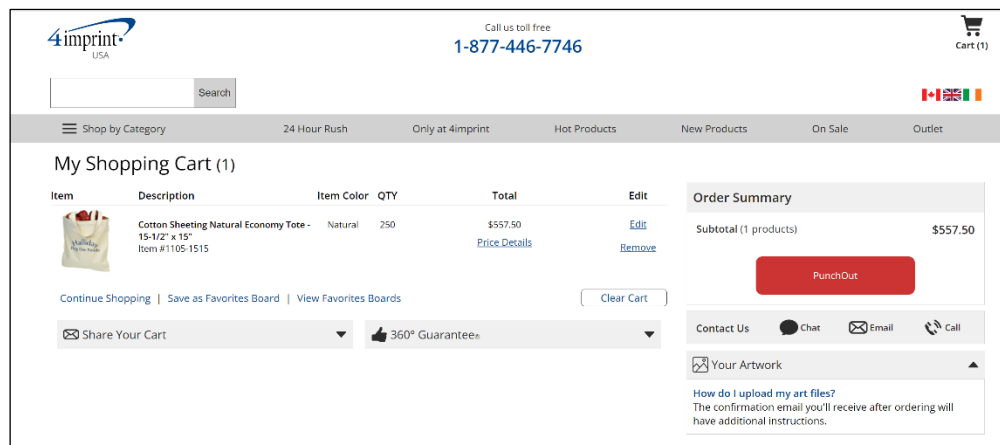
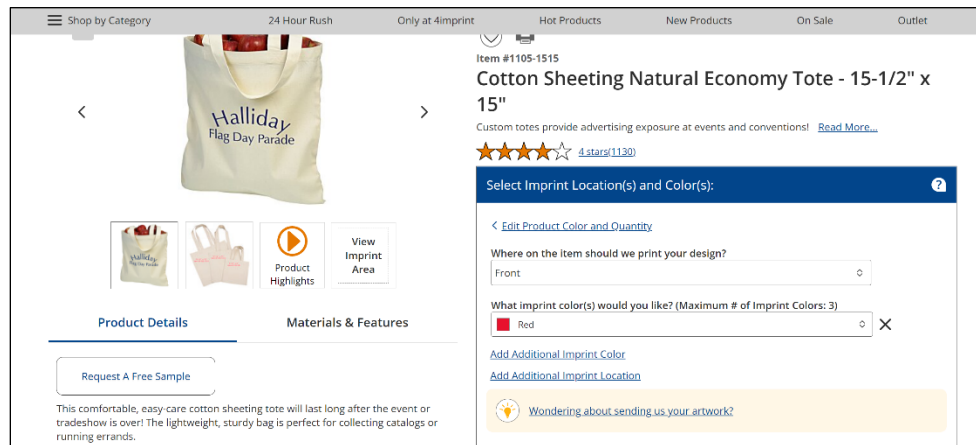
- a. *Note: for some suppliers, you may have to select the **PunchOut** text located just below the search box.*



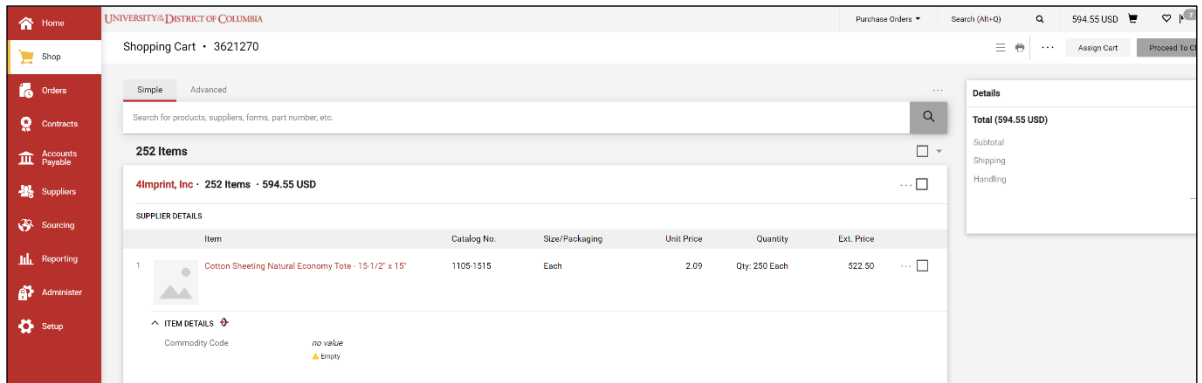
-
- You will be redirected to the supplier's website so that you can shop directly from the supplier.



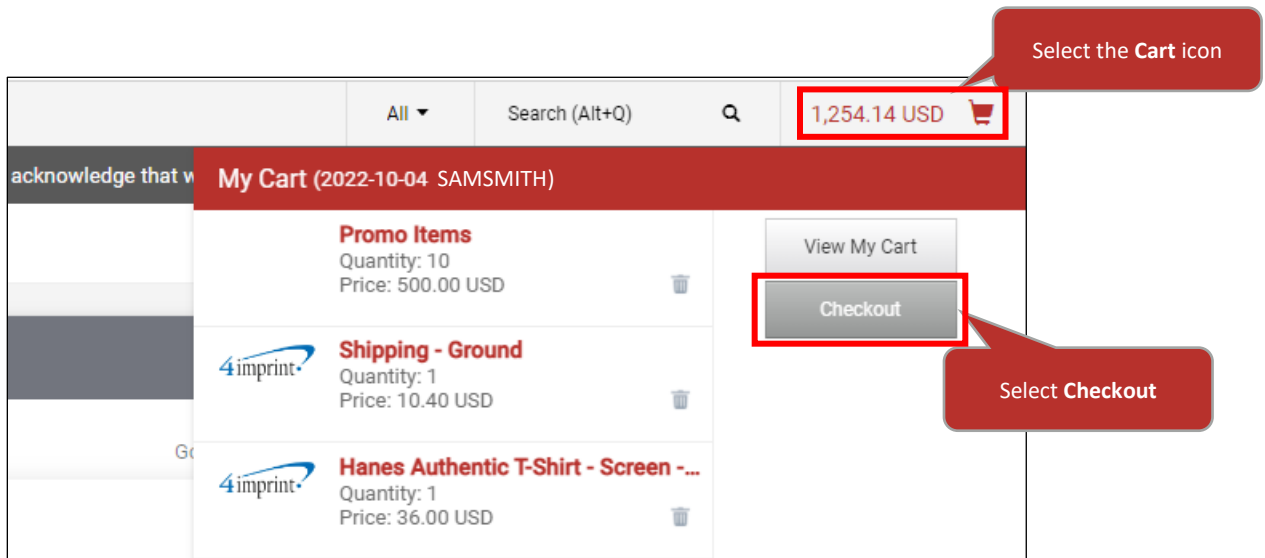
-
-
- Shop on the supplier's website and create a cart as you normally would.



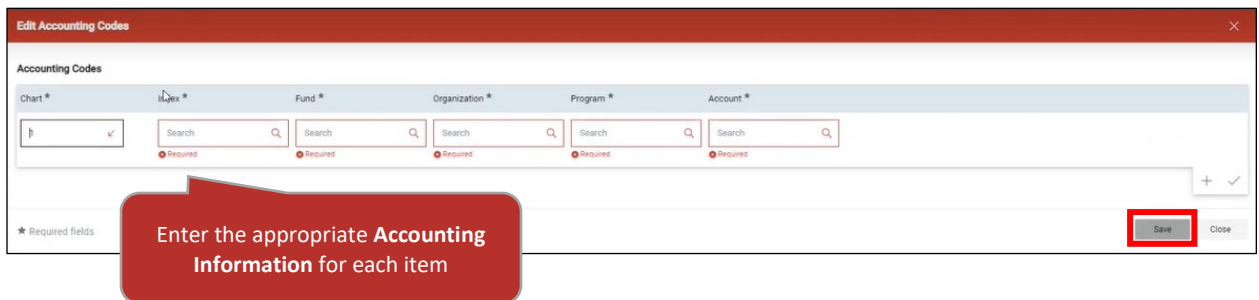
4. When finished, click on **Check Out, PunchOut, Submit Cart, or Create Order Requisition**. *Note: terms may vary depending on vendor. Look for something like the terms listed here.*
5. You will be redirected back to Jaggaer.



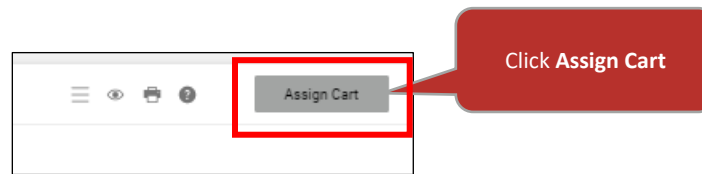
6. Select the **Cart** icon. Ensure the items in the cart are correct and then select the **Checkout** button.



7. Enter the appropriate accounting codes for each line item and click **Save**.



8. Enter the shipping address, the billing address, commodity code, and all other required information.
9. Enter internal and/or external text as needed and attach any relevant documents (e.g. Clean Hands Certificate, etc.)
10. Review all items, making sure quantities and prices are correct.
11. Click the **Assign Cart** in the top right-hand corner to assign your cart to another user *if* you would like for someone else to review your order prior to sending the requisition to an approver. Otherwise, simply submit the requisition for approval.

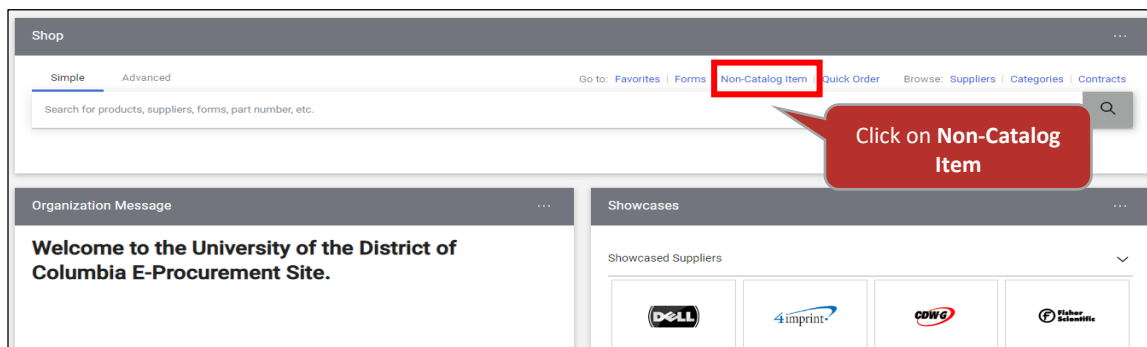


Note: You can view the status of your requisition through the My Requisitions widget on the Shopping Dashboard.

Non-Catalog Item

A Non-Catalog request is required when the service or product needed is not available within the existing Jaggaer electronic catalogs. You may also use this feature when you are unable to find the item you need from within the PunchOut catalogs or for vendors that have submitted a quote via email. Follow the steps below to place a Non-Catalog order:

1. On the Jaggaer homepage, click on **Non-Catalog Item**, which is located on the horizontal menu.



2. The **Add Non-Catalog** form will appear.

3. Select your desired supplier from within the search area.

Add Non-Catalog Item

Existing Supplier

Select Supplier

Select your desired supplier

Item

Description	Catalog No.	Quantity	Price	Packaging
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA - Each

254 characters remaining

Additional Details

Commodity Code

Product Flags

- ☐ Controlled substance
- ☐ Recycled
- ☐ Hazardous material

★ Required fields

Save Save And Add Another Close

4. Review the results and select the appropriate vendor if applicable.
5. Complete the rest of the form, including description, quality, price, packaging, commodity code, and any other relevant information.
6. Which finished, click **Save**. *Note: if you need to add another item, simply choose the **Save and Add Another** option.*
7. Your items will appear in your cart. To view, select the **Cart** icon from the top navigation menu.

1,254.14 USD

Select the Cart icon

My Cart (2022-10-04 00:00:00)

Item	Quantity	Price
Promo Items	10	500.00 USD
Shipping - Ground	1	10.40 USD
Hanes Authentic T-Shirt - Screen - ...	1	36.00 USD

View My Cart

Checkout

8. Click **Checkout**

9. Enter the shipping address, the billing address, the accounting codes, and all other required information.
 - a. When entering the accounting information, you have the option of *splitting* the purchase among multiple accounting codes. To do so, enter the accounting information for the first code, then select the **Add Split** (⊕) option located in the bottom right-hand corner to add a line. Then enter the accounting information for the second accounting code into the added line. When finished, be sure to enter the percentage of price for each line item.

★ Required fields

10. Review all items, making sure quantities and prices are correct.
11. Click the **Assign Cart** in the top right-hand corner to appropriate personnel or submit it for approval.

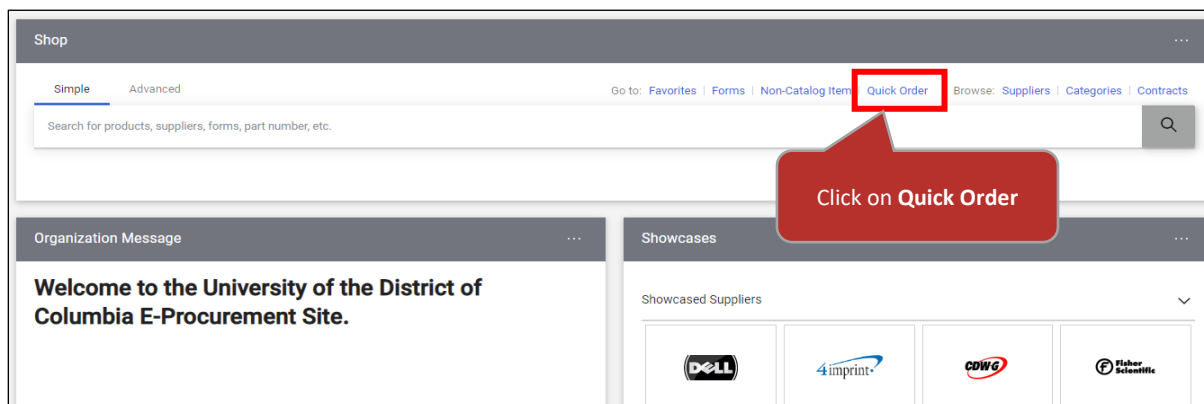


Note: You can view the status of your requisition through the My Requisitions widget on the Shopping Dashboard.

Quick Order

If you know the product number (SKU), you may prefer to use the Quick Order option to add items to your cart quickly and easily. Follow the steps below to place an order using Quick Order:

1. On the Jaggaer homepage, click on **Quick Order**, which is located on the horizontal menu.



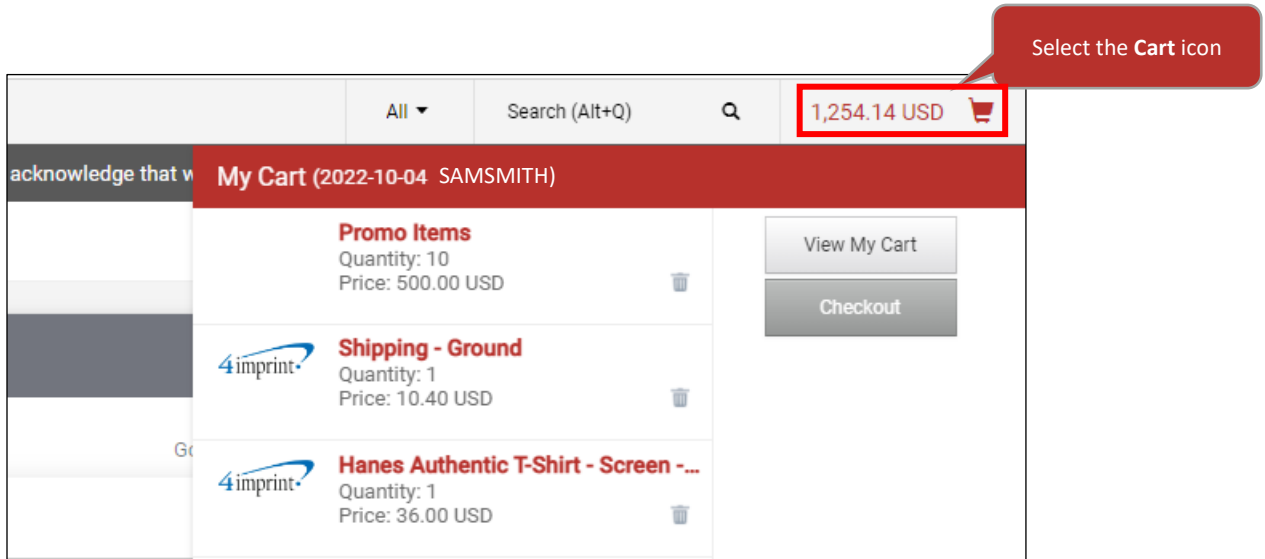
2. The **Quick Order** form will appear. Enter the **Part Number** for each item you would like to order and click the Search Icon. *Note: if you would like to add the SKU, be sure to enter it exactly as the supplier has it listed, including any periods, dashes, parenthesis, etc...*

A screenshot of the 'Quick Order' form. The form has a title bar with a back arrow and the text 'Quick Order'. On the right side of the title bar, there is an 'Add' button highlighted with a red box. The main body of the form is divided into two columns. The left column contains a 'Category' dropdown menu set to 'Everything'. Below it, there are five 'Part Number' input fields, each with a 'SKU' label and a search icon. The first 'Part Number' input field is highlighted with a red box. The right column is currently empty.

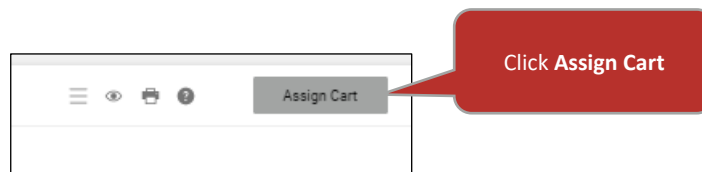
One of the following actions will occur:

- a. If there is only one match for the Part Number, the product will be displayed.
- b. If there is more than one match or if there is no exact match for the Part Number, a list of products will be displayed, and you will need to select your desired product.
- c. If no search results are found, you will receive a "Not Found" message. In this case, check and re-enter your Part Number.

- When finished, click **Add**.
- Your items will appear in your cart. To view, select the **Cart** icon from the top navigation menu.



- Click **Checkout**.
- Enter the shipping address, the billing address, the accounting codes and all other required information.
- Review all items, making sure quantities and prices are correct.
- Click the **Assign Cart** in the top right-hand corner to appropriate personnel or submit it for approval.

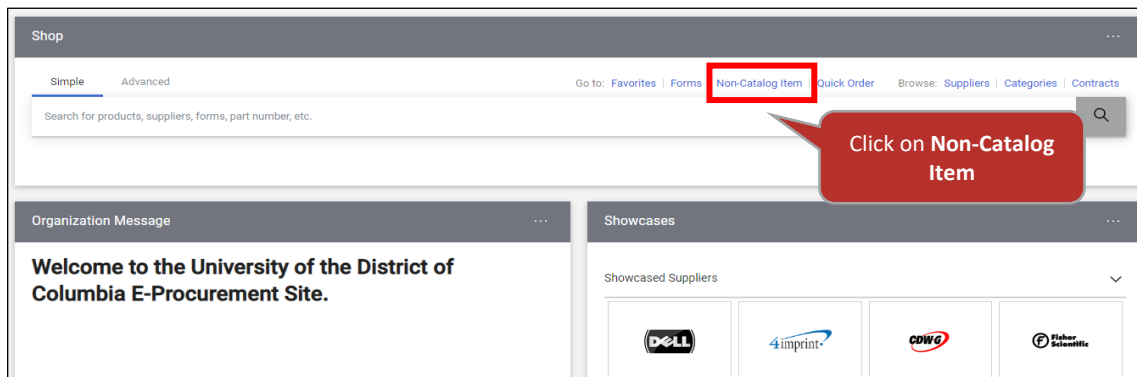


Note: You can view the status of your requisition through the My Requisitions widget on the Shopping Dashboard.

Unknown Supplier

Though not recommended, it is possible to shop with an unknown supplier. However, it is likely that your requisition will not be approved until OCP has received all of the necessary paperwork from the vendor and has entered the vendor into the system. Please keep in mind that it may take time for the necessary vendor paperwork to be completed in order for your requisition to be approved. Follow the steps below to place an order with an unknown supplier:

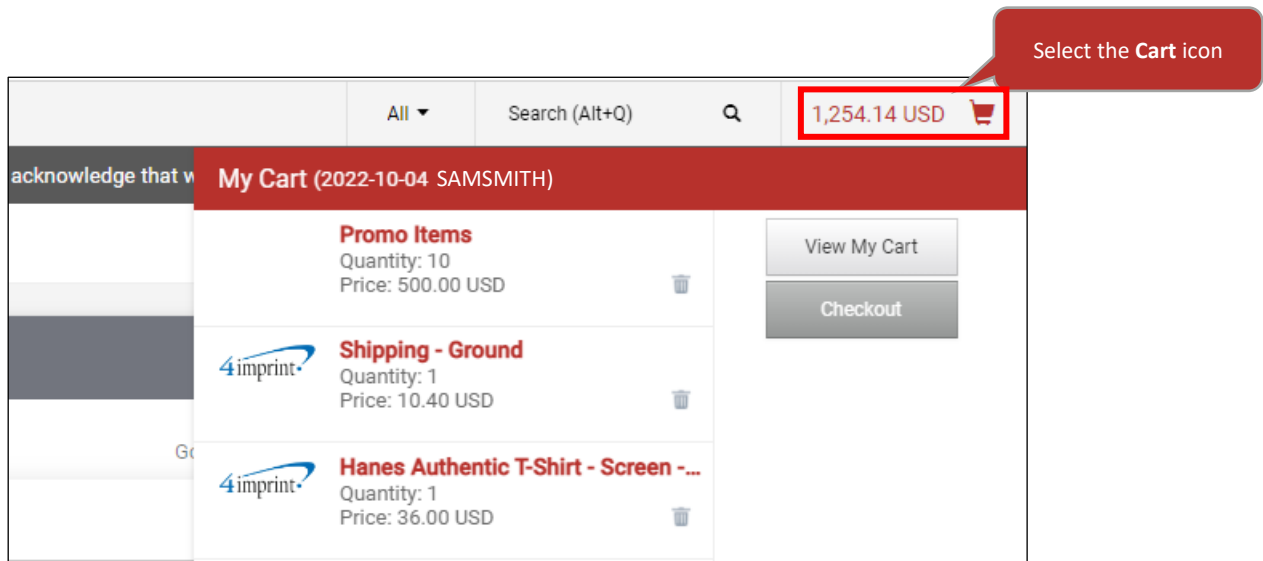
1. On the Jaggaer homepage, click on **Non-Catalog Item** located on the horizontal menu.



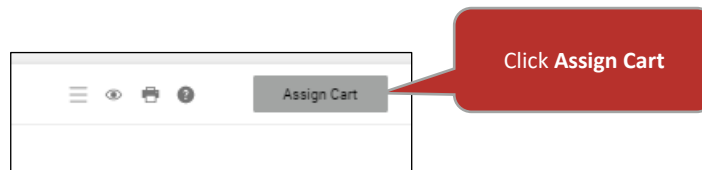
2. The **Add Non-Catalog** form will appear.
3. Set supplier as **Not Known** in the Select Supplier area.

4. Complete the rest of the form, including description, quality, price, packaging, commodity code, and any other relevant information.
5. Which finished, click **Save**. Note: if you need to add another item, simply choose the **Save and Add Another** option.

6. Your items will appear in your cart. To view, select the **Cart** icon from the top navigation menu.



7. Click **Checkout**.
8. Enter the shipping address, the billing address, the accounting codes, and all other required information.
9. Review all items, making sure quantities and prices are correct.
10. Click the **Assign Cart** in the top right-hand corner to appropriate personnel or submit it for approval.

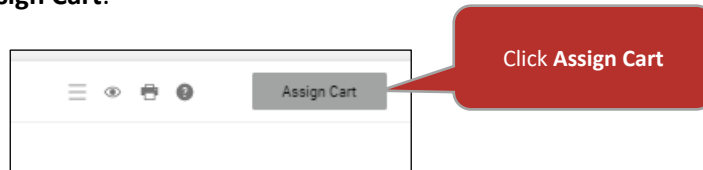


Note: You can view the status of your requisition through the My Requisitions widget on the Shopping Dashboard.

Assigning a Cart

As a UDC Jaggaer user, you are able search and add items to your cart. You are also able to assign your cart to another user to review or you can submit a requisition. Follow the steps below to assign your cart to the appropriate requester:

1. In the checkout process, triple check to ensure that all required fields are complete and that both quantities and pricing are correct.
2. When finished, click on **Assign Cart**.



3. If a requester's name is listed, you can choose to leave it as is. However, if not, select the search option to search for and select the requester you wish to assign the cart to.

A screenshot of a dialog box titled 'Assign Cart: User Search'. It has a red header bar with a close icon. The form contains two main sections: 'Assign Cart To:' and 'Note To Assignee:'. The 'Assign Cart To:' section has a dropdown menu showing 'no value' and 'or SEARCH'. A red callout bubble points to the 'SEARCH' option with the text 'Select the SEARCH icon'. The 'Note To Assignee:' section is a text area. At the bottom, there are 'Assign' and 'Close' buttons. The 'Assign' button is highlighted with a red box.

4. Enter the necessary information to search for your desired requester. When finished, click **SEARCH**.
5. To reduce or eliminate confusion, consider include a brief note to the requester you are assigning the cart to.
6. Afterwards, click **Assign**.
7. This will release your cart to your select requester and you will receive a **Cart Assigned** confirmation message.

A screenshot of a confirmation message titled 'Cart Assigned' with a green header bar and a checkmark icon. Below the header is a table with two columns: 'Requisition Summary' and 'Options'.

Requisition Summary		Options
Requisition number	3617152	Create new draft cart
Cart name	2022-10-04 SAMSMITH	Recent orders
Requisition total	500.00 USD	Return to your home page
Number of line items	1	

8. The requester will complete the necessary steps and submit your requisition.

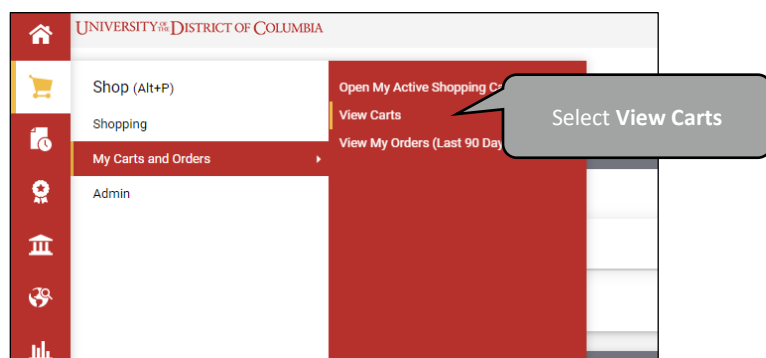
Approving a Requisition

Once a requisition has been submitted, the requisition is automatically forwarded to the appropriate personnel for approval. The approver is responsible for reviewing and approving the requisition on behalf of the funding department.

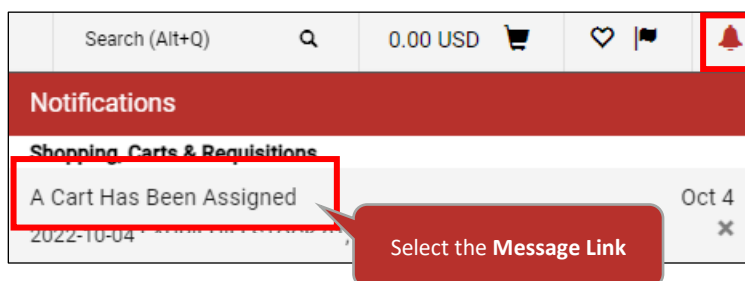
The Requestor

When a cart has been assigned to you, you will receive an email notification and a notification (🔔) in Jaggaer. Follow the steps below to review the cart and submit requisition for approval in Jaggaer:

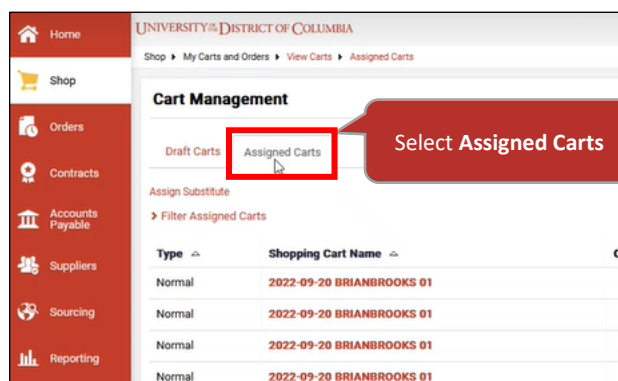
1. Select **Shop** from the side navigation menu, select **My Carts and Orders**, and then **View Carts**.



Or select the link contained within your email OR select the **Jaggaer notification** labeled “A Cart Has Been Assigned” in Jaggaer.



2. Then choose the **Assigned Carts** tab.



3. Select the link of the desired cart from the list.

UNIVERSITY OF THE DISTRICT OF COLUMBIA

Shop > My Carts and Orders > View Carts > Assigned Carts

Cart Management

Draft Carts Assigned Carts

Assign Substitute

> Filter Assigned Carts

Type	Shopping Cart Name	Date Created	Total	Created By
Normal	2022-09-20 BRIANBROOKS 01	9/20/2022	63.50 USD	Brian Brooks
Normal	2022-09-20 BRIANBROOKS 01	9/20/2022	5,000.00 USD	Brian Brooks
Normal	2022-09-20 BRIANBROOKS 01	9/20/2022	25.40 USD	Brian Brooks
Normal	2022-09-20 BRIANBROOKS 01	9/20/2022	5,000.00 USD	Brian Brooks

4. Then choose **Proceed to Checkout**.

Shopping Cart • 3608347

Return Cart Assign Cart **Proceed To Checkout**

Simple Advanced

Search for products, suppliers, forms, part number, etc.

5 Items

CDW LLC dba CDW Government LLC, CDW Government • 5 Items • 63.50 USD

SUPPLIER DETAILS BU Business 2: 230 N Milwaukee Avenue, Vernon ...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Quartet Premium Bullet Dry-Erase Markers - Classic Color Assortment	5382107	Each	12.70	5 Each	63.50

ITEM DETAILS

Commodity Code no value
Empty

Be aware of these issues. You may review and proceed.

Details

Estimate (63.50 USD)

Subtotal	63.50
Shipping	0.00
Handling	0.00
Total	63.50

5. Review the order to ensure all items have been entered correctly and make adjustments as necessary.
 - a. You may also enter notes and add attachments as needed. Internal notes and attachments are intended for UDC personnel. External notes and attachments are intended for the supplier.

Requisition • 3608347

Summary Taxes/SAH PO Preview Comments Attachments History

General

Cart Name: 2022-09-20 BRIANBROOKS 01

Description: no value

Priority: Normal

Prepared by: Benyi Inyama

Prepared for: Brian Brooks

Shipping

Ship To: Contact Line 1 Brian Brooks
12001 Old Baltimore Pike,
Beltsville, MD 20705
United States

Delivery Options

Expedite: ☒

Ship Via: Best Carrier-Best Way

Requested Delivery Date: no value

Billing

Bill To: UDC Accounts Payable
39 suite 200-B
Tel: 202-274-5080
Fax: 202-274-7448
Email: udcacctspay@udc.edu
4200 Connecticut Ave NW
Washington, DC 20008
United States

Billing Options

Accounting Date: no value

Accounting

Chart: 1 University of the D. C. Contracting & Procurement

Organization: 6700 Contracting and Procurement

Program: 600 Institutional support

Account: 701155 Office supplies

Internal Notes and Attachments

Internal Note: no value

Internal Attachments: Add

External Notes and Attachments

Note to all Suppliers: no value

Attachments for all suppliers: Add

What's next for my order?

Next Step: Department Approval

Approvers: Franklin, David
Harris, Mary
Russell, Avis
Whitaker, Eddie

Workflow: Show skipped steps

Draft

Active: Benyi Inyama
On behalf of: Brian Brooks

Banner Budget Authorization 1

Future

Click Submit Requisition

Enter Notes and add Attachments as desired

6. When finished, select **Submit Requisition**. You will receive a confirmation message.

Requisition 3608347 Submitted

Summary

Requisition number: 3608347

Requisition status: Pending

Cart name: 2022-09-20 BRIANBROOKS 01

Requisition date: 9/20/2022

Requisition total: 63.50 USD

Number of line items: 1

Options

Print

Recent orders

Return to your home page

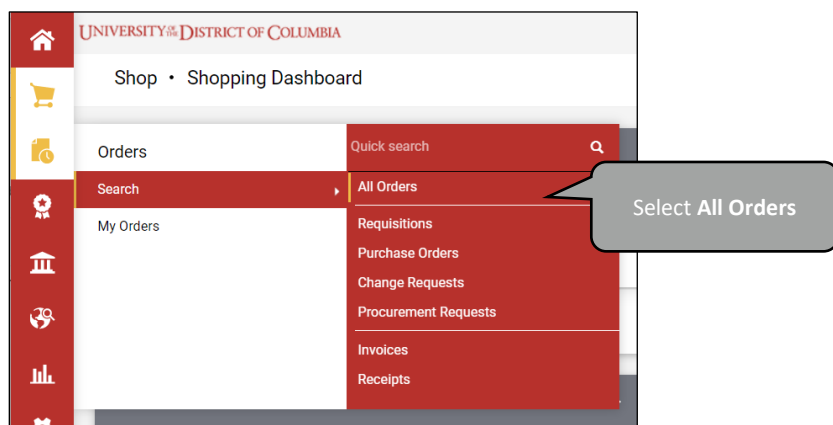
The Approver

When a requisition has been assigned to you, you will receive an email notification and a notification in Jaggaer. Follow the steps below to review and approve the requisition:

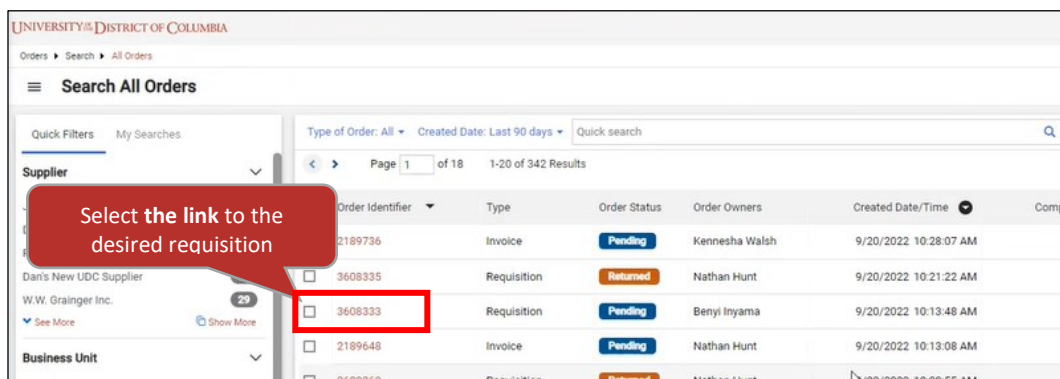
1. You may either click on the **Action Items** icon (🔔) located on the top navigation menu and select the requisition number to be taken to the review page.

OR

2. Select **Orders** from the side navigation menu, select **Search**, and then **All Orders**.

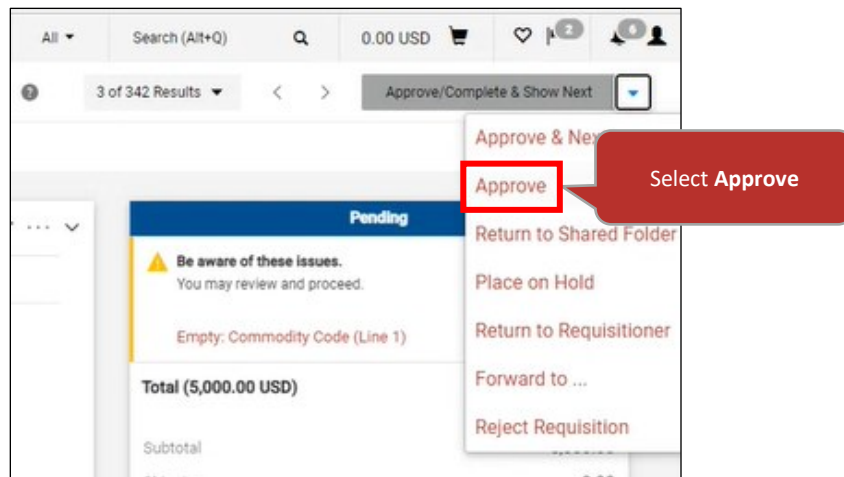


3. Select the link to desired requisition for approval.



4. Review the requisition to ensure all items are correct. Make adjustments as needed.

5. Select **Approve** from the Approve/Complete & Show Next drop down menu.

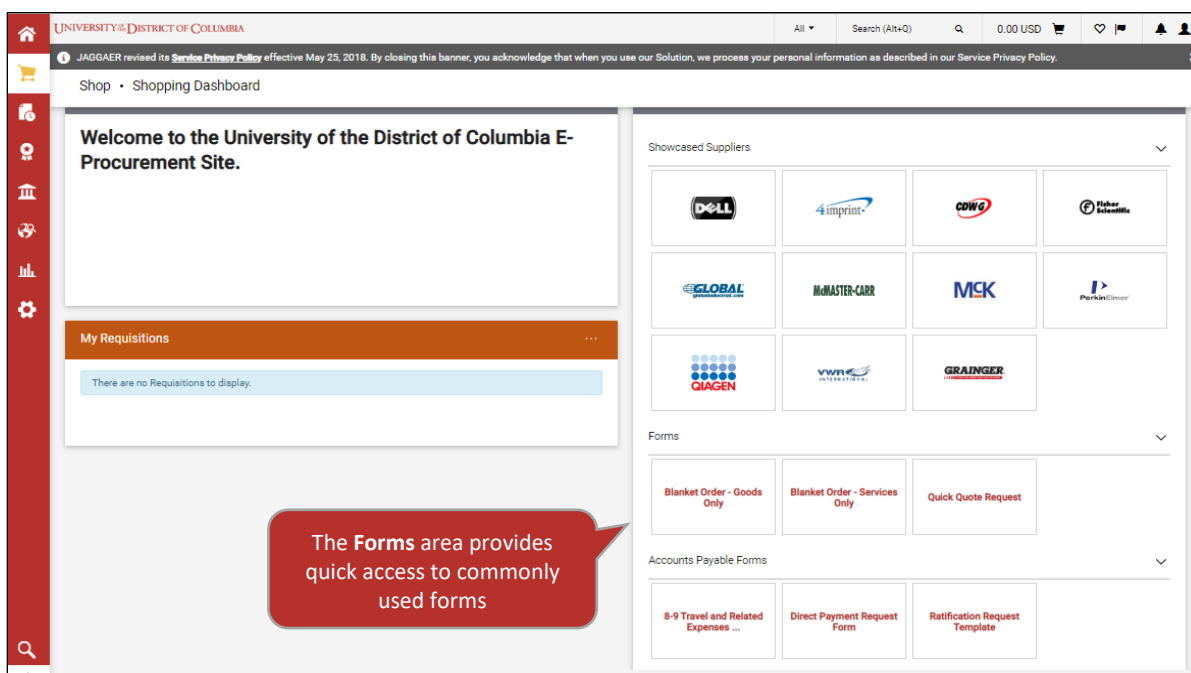


Requisition Approval Options to Consider

Approval Option	Description
Approve & Next	Use this option to approve the current requisition and move to the next requisition in the queue that needs to be approved.
Approve	Use this option to approve the current requisition.
Return to Shared Folder	Use this option to return the requisition back to the queue for a different approver to review.
Place Invoice on Hold	Use this option to place the requisition on hold until additional information can be obtained.
Return to Requisitioner	Use this option to return the requisition back to the requisitioner to make changes.
Forward to...	Use this option to forward the requisition to a different approver. When you forward, your selected approver will approve on your behalf.
Reject Requisition	Use this option to reject or cancel the requisition. If the requisition is rejected, the submitter would need to create a new form, because the rejected form cannot be edited or resubmitted.

Forms

Forms in Jaggaer are “electronic” versions of the UDC paper form. They may be used to order goods and services. Jaggaer forms can be completed online, added to a Cart, and submitted. In addition, you can attach items to forms as needed. All Jaggaer forms are located within the Forms widget on the Jaggaer dashboard. There are two categories of forms: General Forms and Accounts Payable Forms. *Note: If you need access to a form that is not listed, contact OCP.*



General Forms

There are three general forms available to all users in Jaggaer, as follows:

Form	Description
Blanket Order – Goods Only	Use this form when you have an undetermined amount of goods that need to be purchased.
Blanket Order – Services Only	Use this form when you have an undetermined amount of services that need to be purchased.
Quick Quote Request	Use this form if you want to obtain a quick quote from a vendor and to create a requisition based on that quote.

Blanket Order for Goods or Services

A blanket purchase order is necessary when there is an undetermined amount of goods and services that need to be purchased. This may be the case due to damage from a major unexpected event occurs (i.e., hurricane, snow, or tornado), and services are needed for repairs and/or cleaning. Funds for these types of issues are set aside and are drawn on by the University as needed. Follow the steps below to complete a blanket order for goods or services:

1. From the **Forms** widget on the Jaggaer dashboard, select the Blanket Order- Goods Only or Blanket Order – Services Only form.
2. Review the instructions carefully.
3. Afterwards, step through the screens using the **NEXT** button and complete each requested item in detail, including (but not limited to): supplier information, unit price, product description, part no. (if applicable), service state and end dates, and commodity code. *Note: You can save your progress and return as needed.*

Blanket Order - Goods Only

Form Number 718307
Purpose Procurement Request
Status Incomplete

Instructions

Suppliers ⚠️
Attachments ✓
Form Fields ✓
Review and Submit

Instructions

Please use this form to request a blanket order. Blanket Orders are set up as an effective tool to use when issuing multiple payments under one order to a vendor for a set timeframe (typically fiscal year). They are typically used after a contract is established and pricing is confirmed.

You should the blanket order option when:

- The goods or services are recurring purchases.
- There will be multiple payments issued against the purchase order.
- The order involves variable dollar amounts and/or quantities.
- The goods or services on an order may change over time.
- The maximum order amount may need to be adjusted over time.
- The order has specific contract start and end dates.

For questions please contact OCP at procurement@udc.edu.

Next >

4. When finished, click **Add and go to Cart**.
5. Review the details of the order. Afterwards, click **Proceed to Checkout**.

Shopping Cart • 3617152

ITEM DETAILS

Commodity Code

3 Shipping - Ground UPSGRND001 Each 10.40 Qty: 1 Each 10.40

Proceed To Checkout

Click Proceed to Checkout

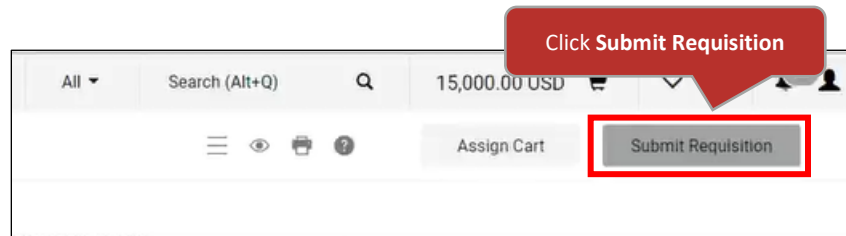
6. Enter the shipping address, the billing address, the accounting codes, and all other required information.

Accounting Codes

Enter the Accounting Codes

Chart	Index	Fund	Organization	Program	Account
1	no value	no value	no value	no value	no value
University of the D. C.	Required	Required	Required	Required	Required

7. Review all items, making sure quantities and prices are correct. Make adjustments as needed.
8. Click **Submit Requisition**.



9. You will receive a confirmation message.

✓ Requisition 3608330 Submitted

Summary	Options
Requisition number 3608330	Print
Requisition status Pending	Recent orders
Cart name 2022-09-20 NATHANHUNT 01	Return to your home page
Requisition date 9/20/2022	
Requisition total 15,000.00 USD	
Number of line items 1	

Note: You can view the status of your requisition through the My Requisitions widget on the Shopping Dashboard.

Quick Quote Request

It is ideal to use the quick quote request form when you want to obtain a quick quote from a vendor and to use that quote to create a requisition. Follow the steps below to complete a quick quote request:

1. From the **Forms** widget on the Jaggaer dashboard, select the Quick Quote Request form.
2. Review the instructions carefully.
3. Afterwards, step through the screens using the **NEXT** button and complete each requested item in detail. *Note: You can save your progress and return as needed.*
 - a. Each quick quote request has a product and service line item as well as a supplier section. You must include at least one product or service AND at least one supplier to submit the form.

Quick Quote Request

Form Number: 718447
Purpose: Quick Quote Request
Status: Incomplete

Instructions

Quick Quote Request ▲
Attachments ✓
Questions ▲
Product Line Items ✓
Service Line Items ✓
Suppliers ▲
Review and Submit
Form Approvals

Instructions

Please use this form to request a new sourcing event. This could be a Request for Quote or Request for Proposal. Once submitted, this form will route to the Office of Contracting and Procurement where it will be evaluated.

Request Actions ▼ | History ?

Next ➤

4. When finished, click **Submit**. The request will be submitted into the approval workflow. You will receive a notification (by email or in Jaggaer) regarding the status of your request when the workflow is complete.

Accounts Payable Forms

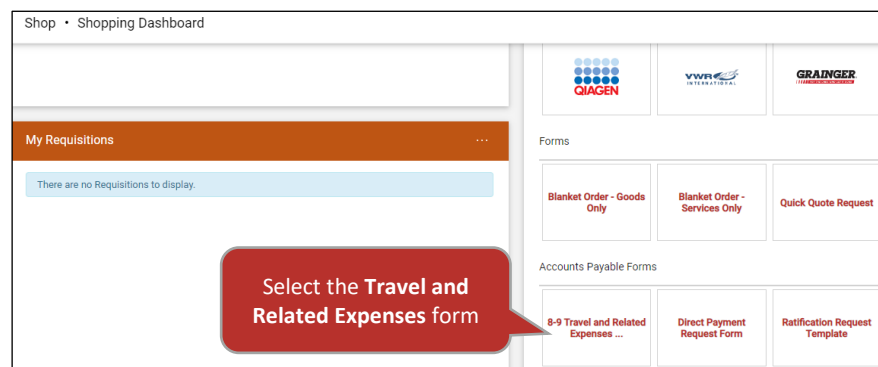
There are three accounts payable forms available to all users in Jaggaer, as follows:

Form	Description
8-9 Travel and Related Expense Reimbursement Form	Use this form to request reimbursement for travel and related expenses.
Direct Payment Request Form	Use this form when you have an order that was not originally placed in Jaggaer.
Ratification Request Template	Use this template only when goods or services are received without a purchase order.

8-9 Travel and Related Expenses Form

This form should be used to request reimbursement for travel and related expenses. When completing this form, be sure to describe the purpose of the travel and include all related expenses with corresponding receipts. Follow the steps below to complete the Travel and Related Expenses form and submit your requisition:

1. From the **Accounts Payable Forms** widget on the Jaggaer dashboard, select the **Travel and Related Expenses** form.



2. Review the instructions carefully. Afterwards, step through the screens using the NEXT button and complete each requested item in detail. If you are submitting payment to an individual, they will need to be added as a supplier. *Note: You can save your progress and return as needed.*

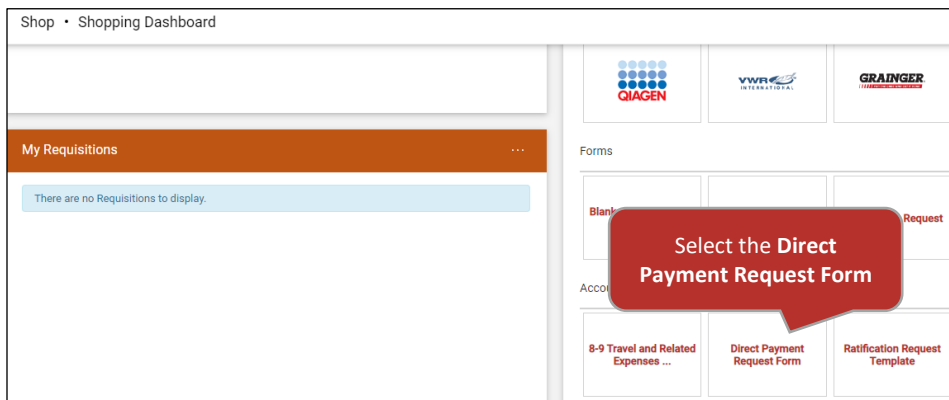
The screenshot shows the 'Travel and Related Expenses' form. On the left, there's a sidebar with 'Form Number: 718482', 'Purpose: Check Request', and 'Status: Incomplete'. Below this are links for 'Instructions', 'Supplier', 'Questions', 'Attachments', 'Review and Submit', and 'Form Approvals'. The main form area is titled 'Supplier' and contains fields for 'Supplier *', 'Shipping Fee Type *' (set to 'Flat Fee'), 'Shipping *' (0.000), 'Handling Fee Type *' (set to 'Flat Fee'), and 'Handling *' (0.000). A legend indicates that '*' denotes 'Required'. At the bottom right, there are three buttons: 'Previous', 'Save Progress', and 'Next'. The 'Next' button is highlighted with a red box.

3. When finished, click **Submit**.

Direct Payment Request Form (a.k.a. Form 440)

This form should be used to request payment for an order was not placed within Jaggaer, invoices that do not have a PO, travel advances, and student stipends. When completing this form, be sure to describe the purpose of the direct payment and all related expenses with corresponding invoices or receipts. Follow the steps below to complete the Direct Payment Request form and submit your requisition:

1. From the **Accounts Payable Forms** widget on the Jaggaer dashboard, select the **Direct Payment Request Form**.



2. Review the instructions carefully. Afterwards, step through the screens using the NEXT button and complete each requested item in detail, including (but not limited to): supplier information, invoice details, payment information, accounting codes, and any applicable attachments. *Note: You can save your progress and return as needed.*

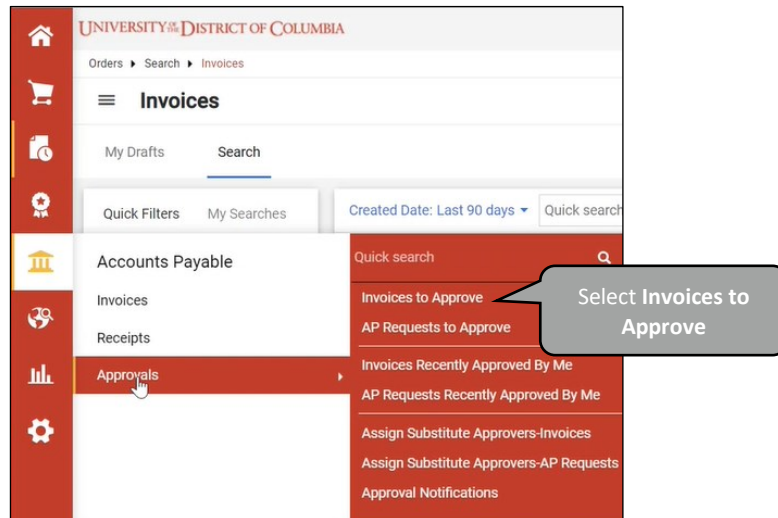
A screenshot of the 'Direct Payment Request Form' (Form 440) in the Jaggaer system. The form is titled 'Direct Payment Request F...' and shows 'Form Number 718504', 'Purpose Check Request', and 'Status Incomplete'. A left sidebar contains navigation links: 'Instructions', 'Supplier' (selected), 'Questions', 'Attachments', 'Review and Submit', and 'Form Approvals'. The main area is the 'Supplier' section, which includes fields for 'Supplier *', 'Shipping Fee Type *' (Flat Fee), 'Shipping *' (0.000), 'Handling Fee Type *' (Flat Fee), and 'Handling *' (0.000). A 'Supplier Search' link is also present. At the bottom right, there are buttons for 'Previous', 'Save Progress', and 'Next' (highlighted with a red box). A legend indicates that '*' denotes required fields.

3. When finished, click **Submit**. The invoice is automatically created.

Approving the Direct Payment Request

Once the direct payment form has been submitted, it automatically generates an invoice. Follow the steps below to approve the invoice:

6. Select **Accounts Payable** from the side navigation menu, select **Approvals**, and then **Invoices to Approve**.



7. Select the link to the desired invoice.

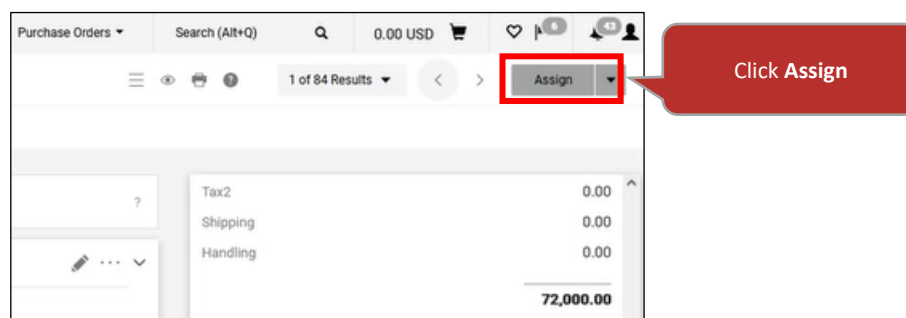
Created Date: Last 90 days Quick search Add Filter Clear All Filters

Page 1 of 5 1-20 of 84 Results

Invoice Number	Supplier Invoice	PO Number	Invoice Status	Created Date/Time	Due Date	Discount Date	Discount Amount
2191168			Pending	9/22/2022 10:02:14 AM	9/22/2022		0.00 USD
2191167	Spring2002	Dell Computer Corp.	Pending	9/22/2022 9:59:09 AM	9/22/2022		0.00 USD

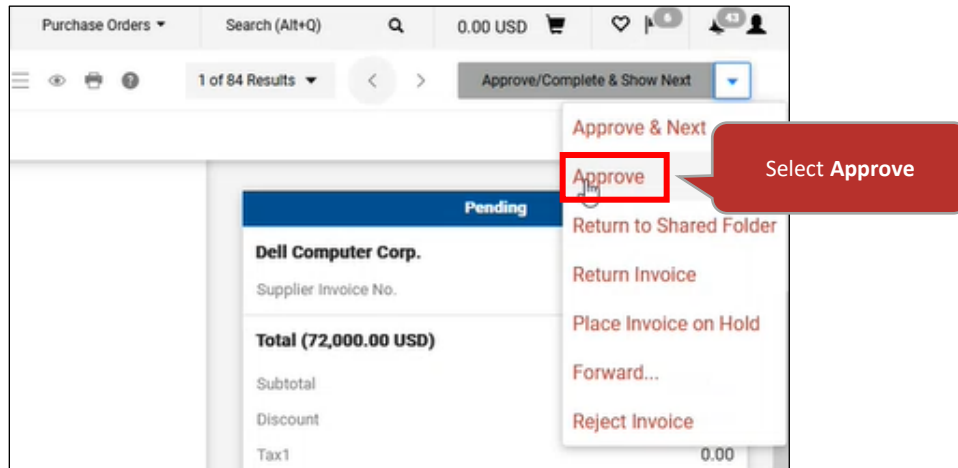
Select the link to the desired invoice

8. Click **Assign** to assign the invoice to yourself.



9. Review the invoice to ensure all items are correct. Make adjustments as needed.

10. Select **Approve** from the Approve/Complete & Show Next drop down menu.



11. Afterwards the invoice goes the remaining approval process, including DP Budget Analysis approval, Budget Officer Approval, AP Review, and DP AP Manager Approval.

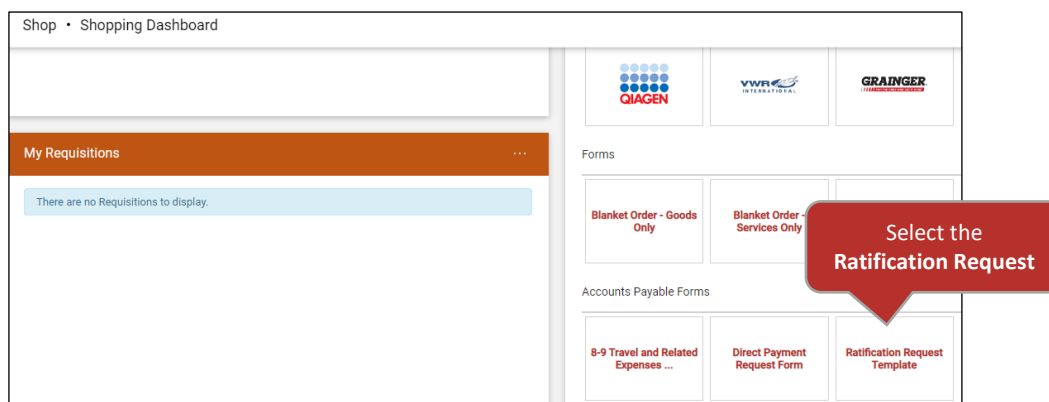
Invoice Approval Options to Consider

Approval Option	Description
Approve & Next	Use this option to approve the current invoice and move to the next invoice in the queue that needs to be approved.
Approve	Use this option to approve the current invoice.
Return to Shared Folder	Use this option to return the invoice back to the queue for a different approver to review.
Return Invoice	Use this option to return the invoice back to the submitter to make changes.
Place Invoice on Hold	Use this option to place the invoice on hold until additional information can be obtained.
Forward	Use this option to forward the invoice to a different approver. When you forward, your selected approver will approve on your behalf.
Reject Invoice	Use this option to reject or cancel the invoice. If the invoice is rejected, the submitter would need to create a new form, because the rejected form cannot be edited or resubmitted.

Ratification Form

Though not recommended, it is possible to place an order when you do not have a purchase order. For example, if the order was placed and the goods and services were delivered before you realized that a purchase order was needed. In this case, the Ratification Form (a.k.a. the After the Fact form) should be used. However, it is likely that your ratification will not be approved until OCP has received and approved all of the necessary paperwork. Please keep in mind that it may take time for your ratification to be approved. Follow the steps below to complete the ratification form and submit your requisition:

1. From the **Accounts Payable Forms** widget on the Jaggaer dashboard, select the **Ratification Request Template** form.



2. Review the instructions carefully. Afterwards, step through the screens using the NEXT button and complete each requested item in detail, including (but not limited to): supplier information, ratification details, accounting and commodity codes, and attachments (if applicable). *Note: You can save your progress and return as needed.*

The screenshot shows the 'Ratification Request Temp...' form. On the left, there's a sidebar with a 'Form Number' of 718411, a 'Purpose' of 'Check Request', and a 'Status' of 'Incomplete'. The main content area is titled 'Instructions' and contains a table with the following information:

Title:	President's approval:
Unauthorized Procurements and Ratification Policy	04/28/2010

Below the table, there's a section titled 'Related Policies and Procedures:' which lists 'UDC Procurement Rules (8 DCMR § 3000 et seq.)' and 'UDC PASS (Procurement Automated Support System) Approver Policy'. The main body of the form contains a section titled 'I. Unauthorized Procurements' with a numbered list of rules. At the bottom right, there is a 'Next >' button highlighted with a red box.

3. When finished, click **Submit**.

4. The invoice is automatically created. To view the actual invoice, select the invoice link.

← Back to View Forms

Ratification Request Temp...

Form Number **714925**
Purpose **Check Request**
Status **Approved**
Invoice **2189648**

Instru...
Supp...
Questions ✓
Codes ✓
Additional Information ✓
Attachments ✓
Review and Submit

Form Approvals

Show skipped steps ☐
Orientation **Horizontal** ▾

Submitted 9/20/2022 10:17 AM → **Auto-Create Invoice** Completed ✓ 9/20/2022 10:17 AM

Select the link

Approvers

Approvers are responsible for reviewing and approving purchase orders or requisitions on behalf of the funding department. They review both the budget and procurement areas prior to approval. Approvers can take the following actions: approve, change, return/reject requisitions, or put requisitions or invoices on hold.

*Note: Approvers **do not** have the ability to approve their own request.*

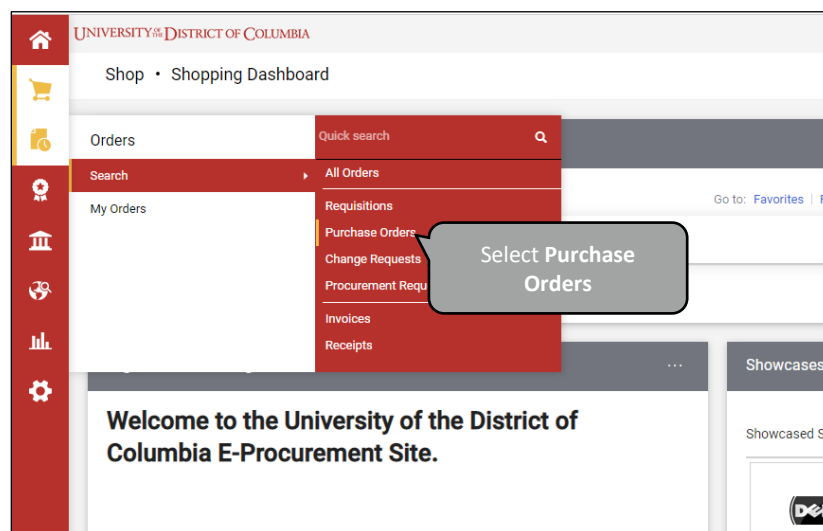
Change Request

Sometimes changes need to be made. For example, you may need to adjust information (i.e., add, remove, modify line items, or accounting codes) on a submitted requisition. When this happens, you will need to work through the Jaggaer change request process.

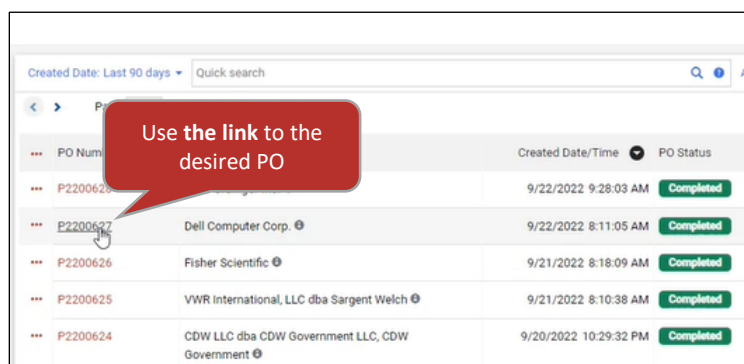
Adding a Change Request

Follow the steps below:

1. Select **Orders** from the side navigation menu, select **Search**, and then select **Purchase Orders**.



2. Select the link to the desired PO.



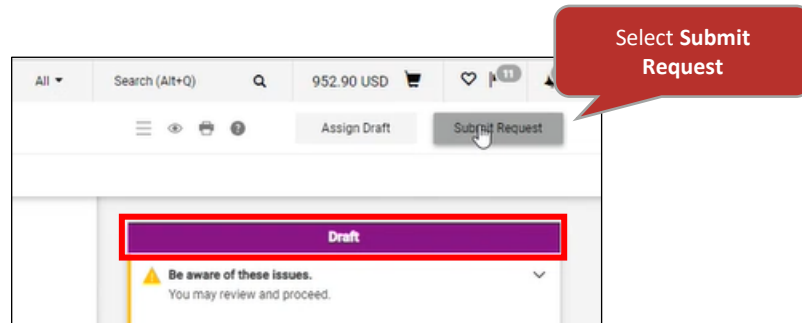
3. Using the dropdown menu next to the purchase order number, select **Create Change Request**.

The screenshot shows the 'Purchase Order' page for 'P2200627 Revision 0'. A dropdown menu is open next to the revision number, displaying several options. The option 'Create Change Request' is highlighted with a red box. A red callout bubble with the text 'Select Create Change Request' points to this option. The background shows the 'General Information' section of the purchase order, including the PO/Reference No. P2200627, Revision No. 0, Priority Normal, Supplier Name Dell Computer Corp., and Address Dell Marketing L.P., PO Box 643561, Pittsburgh, Pennsylvania 15260.

4. Complete the **Create Change Request** form. Then, click **Create Change Request**.

The screenshot shows the 'Create Change Request' form. The form has a red header with the title 'Create Change Request' and a close button. The main text explains that this will create a change request for the purchase order and that a user will receive an email notification. Below this, there are two sections for email notifications. The first section, 'Email notification(s) | Add recipient', has two checkboxes: 'Benyi Inyama (Prepared by, Approved Requisition, Prepared for) <binyama@udc.edu>' and 'Brian Brooks <brian.brooks@udc.edu>'. The second section, 'User with change request permission:', has three checkboxes: 'Benyi Inyama (Approved) <binyama@udc.edu>', 'Brian Brooks (Approved) <brian.brooks@udc.edu>', and 'Michiko Gadson (Approved) <mgadson@udc.edu>'. Below these is a link 'add email recipient...'. The 'Change Request Reason' section has a large text area with a character count of '1000 characters remaining' and links for 'expand' and 'clear'. The 'Attach file to this change request (optional):' section has two radio buttons: 'File' (selected) and 'Link/URL'. At the bottom, there is a red callout bubble with the text 'Select Create Change Request' pointing to the 'Create Change Request' button, which is highlighted with a red box. A 'Close' button is also visible next to it.

5. If the funding is changing for:
 - a. The entire order, select **edit** at the header level.
 - b. One line item in the order, select **edit** at that specific line level.
6. Make the necessary updates to the appropriate Funding and select **Save**.
7. Optional: If you would like to send the change order to the supplier, enter the **External Communication** area. Then, check the box labeled **Suppliers on Change Request**. Otherwise, leave this unchecked.
8. Note that the status has changed to **DRAFT**. Then click **Submit Request**.



9. You will receive a Change Request confirmation message.

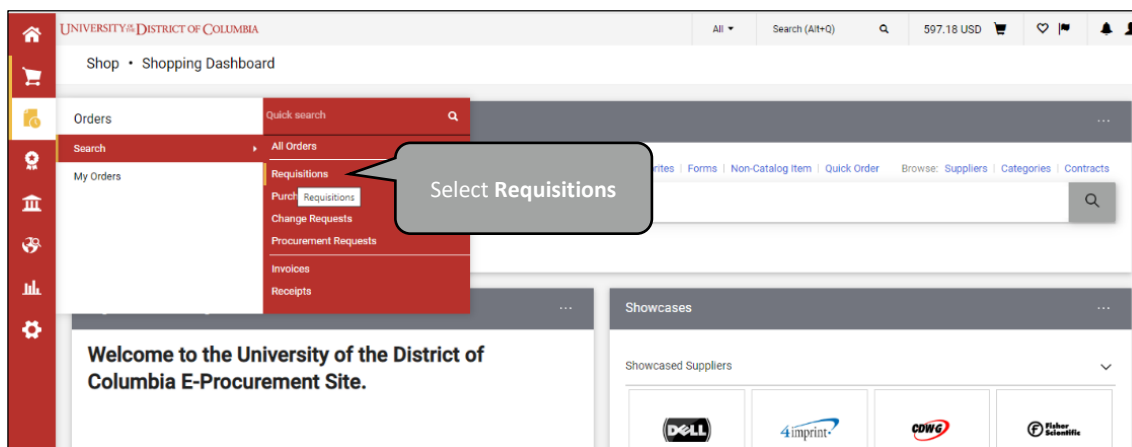
Change Request 3610199 Submitted	
Summary	Options
Change Request number	3610199
Change Request status	Pending
Cart name	2022-09-22 BINYAMA 01 - CR
Change Request date	9/22/2022
Change Request total	12,500.00 USD
Number of line items	2
	Print Recent orders Return to your home page

Note: You are encouraged to select View Approval Status to view the approval workflow that the change order will go through. It is similar to the actual requisition workflow.

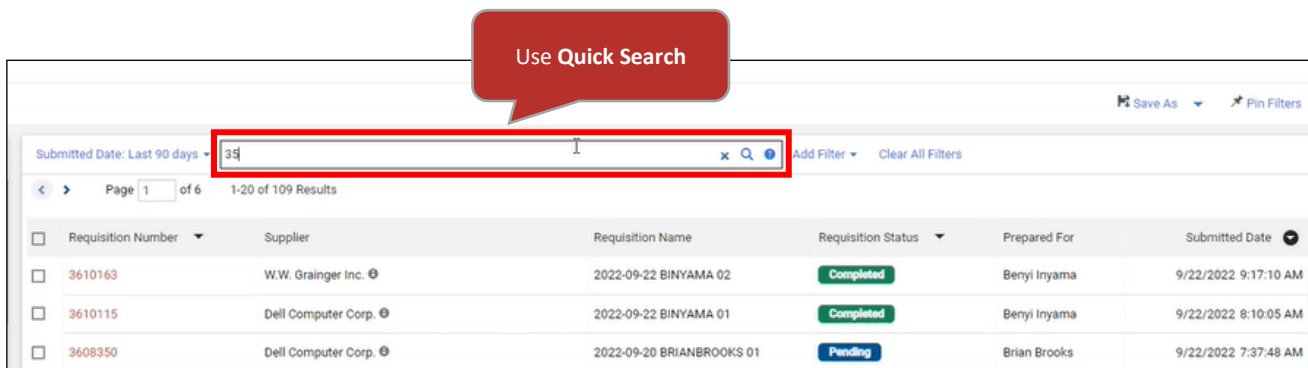
Returning a Requisition

At times, it becomes necessary to return requisitions. This could be due to accounting code errors, pricing or simply that the goods or services are no longer needed. Follow the steps below to return a requisition:

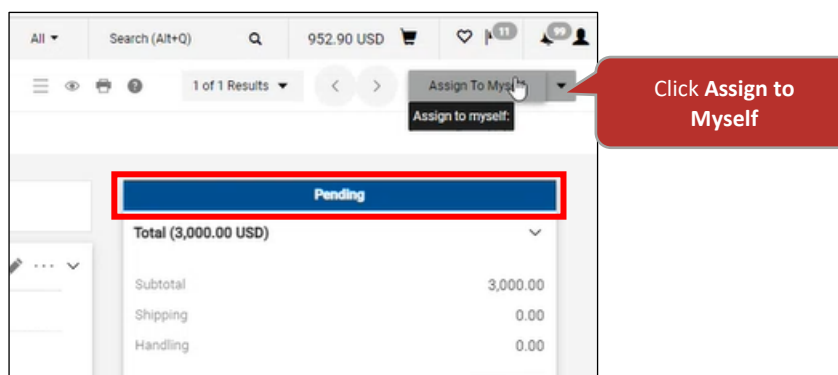
1. Select **Orders** from the side navigation menu, select **Search**, and then select **Requisitions**.



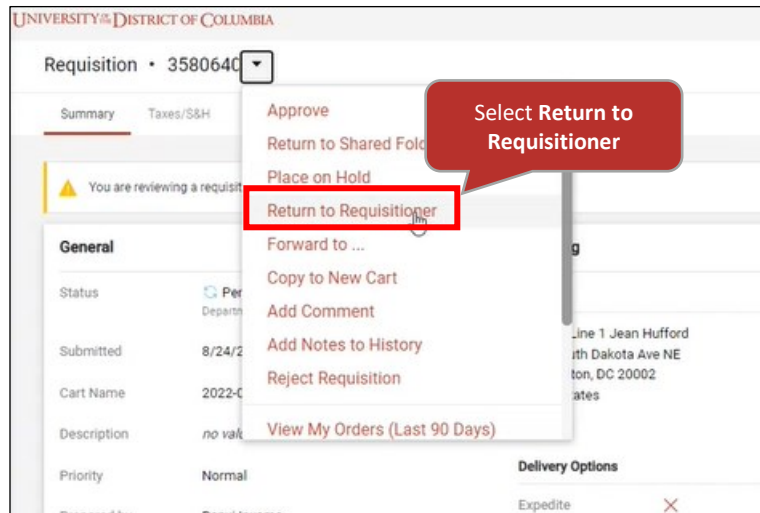
2. Use the **Quick Search** feature to **search** for your desired requisition. Specifically, enter the requisition number and press **ENTER**.



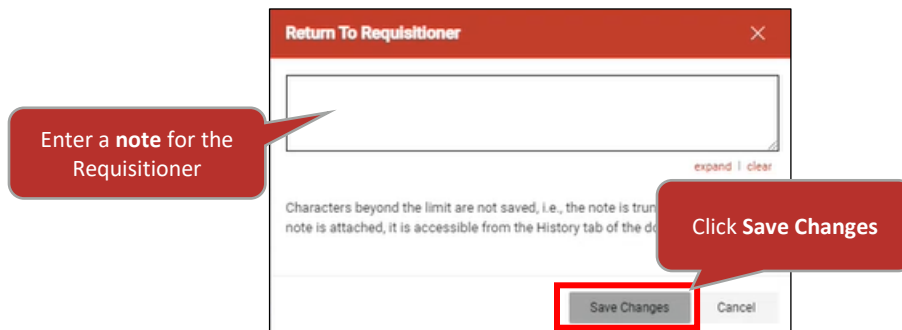
3. Ensure that the requisition is marked **PENDING**. Then click **Assign to Myself**.



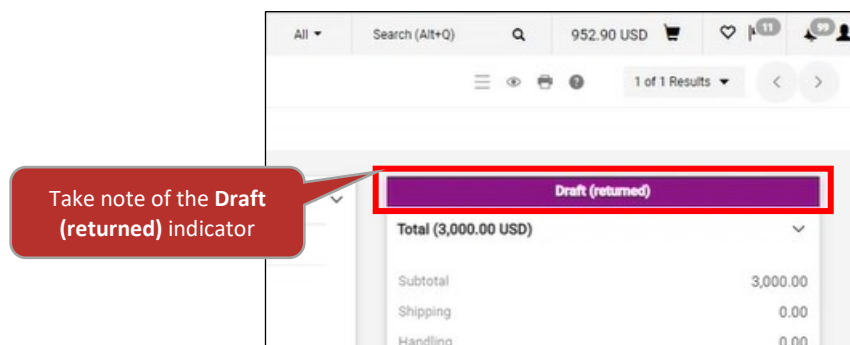
4. Using the dropdown menu next to the requisition number, select **Return to Requisitioner**.



5. Enter a note for the requisitioner, explaining the reason for the return. Click **Save Changes**.



6. The system will indicate **Draft (returned)**.



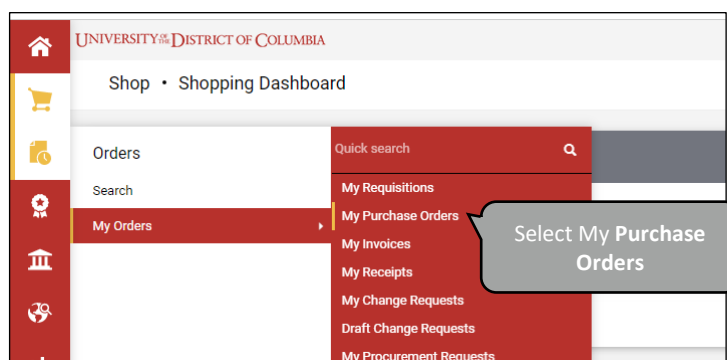
Receiving Goods & Services

Receiving can be completed on a purchase order. You can fully or partially receive an order. You can find the purchase order by using the side navigation menu or through the quick search option.

Quantity Receipts

Follow the steps below to receive goods:

1. Select **Orders** from the side navigation menu, select **My Orders**, and then select **My Purchase Orders**.



2. Select the link to the desired PO.

Created Date: Last 90 days Quick search Add Filter Clear All Filters

PO Owner: Inyama, Benyi

Page 1 of 3 1-20 of 49 Results 20 Per Page

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
P2200628	W	9/22/2022 9:28:03 AM	Completed	3610163	Benyi Inyama	Sent To Supplier	No Matches	89.40 USD
P2200627	DI	9/22/2022 8:11:05 AM	Completed	3610115	Benyi Inyama	Sent To Supplier	No Matches	12,500.00 USD
P2200626	Fisher Scientific	9/21/2022 8:18:09 AM	Completed	3608608	Benyi Inyama	Sent To Supplier	No Matches	5,030.75 USD

Use the link to the desired PO

3. Select the **Receipts** tab.

UNIVERSITY OF THE DISTRICT OF COLUMBIA

Purchase Order • P2200628 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests **Receipts** Invoices Comments Attachments History

General Information PO/Reference No. P2200628 Revision No. 0

Shipping Information Ship To Attn: Benyi Inyama

Billing/Payment Bill To UDC Accounts Payable

4. Select the **Create Quantity Receipt** option.

UNIVERSITY OF THE DISTRICT OF COLUMBIA

Purchase Order • P2200628 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests **Receipts** Invoices Comments Attachments History

Records found: 0

There are no receipts for this PO.

+ Create Quantity Receipt

5. Complete the form in its entirety, noting that the **packing slip number** and the **tracking number** are both required.
6. Scroll down and enter the quantity that you have received.
- If you enter the full amount of the order, you are confirming that you have fully received the goods and services ordered.
 - If you enter a partial amount, you are indicating that you have partially received the amount of goods and services ordered.

PO • P2200628



Line	Item	Catalog No.	Quantity	Status
1	TK1301451T Adhesive Remover, Container Size 4.5 oz, Container Type Aerosol Spray Can, Surfaces for Use On Aluminum, Fiberglass, Plastics, Steel, Removes Adhesive, Glue, Gum, VOC Content 80 Percent, Ready to Use, Standards OSHA, Recommended Dilution Ready		5	Received

7. When finished, click **Complete**.

Purchase Orders Search (Alt+Q) 0.00 USD Save Updates **Complete**

Draft

8. You will receive a Receipt Created confirmation message.

✓ Receipt Created	
Summary	Next Steps
Receipt No 526198 	Create Qty Receipt
Created for the PO No(s) P2200628 	

Return Receipt

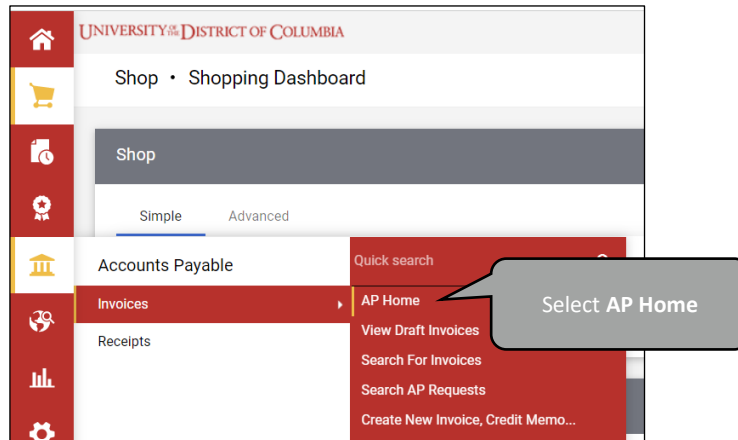
Return receipts are used to return goods. Follow these steps:

1. Go to the **Receipt tab** to determine if there has been a previous receipt.
2. Then click **Create Cost Receipt**.
3. Click **Show Receipt Details**.
4. Click **Attached/Link** to pertinent items. Also, add notes as needed.
5. Enter the **Quantity** to be returned.
6. Select the dropdown under Line Status and update to Returned and include the reason for the return.
7. Review and click **Complete**. This will create a receipt number.

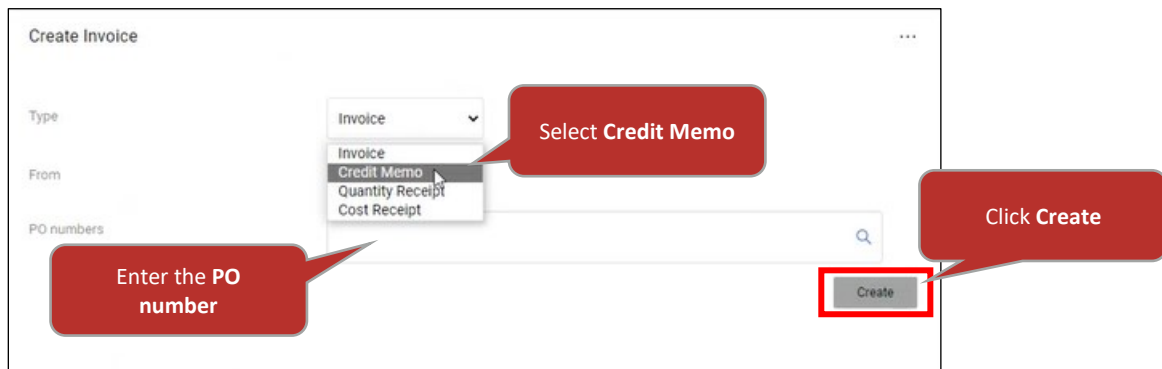
Credit Memo

A credit memo is a document issued by vendor to UDC, reducing the amount that UDC owes the vendor. Follow these steps to create a credit memo:

1. Select **Accounts Payable** from the side navigation menu, select **Invoices**, and then select **AP Home**.



2. In the Create Invoice widget, select **Credit Memo** from the Type dropdown menu. Enter the **PO number** and then click **Create**.



3. Complete the Credit memo form.

The screenshot shows the 'Credit memo' form for ID 2191175. The 'Entry' tab is active. Fields include: 'Invoice Number' (no value), 'Invoice Date' (9/21/2022, required), 'Due Date' (no value, override), 'Invoice Owner' (Benyl Inyama), 'Supplier Name' (Global Equipment company Inc dba GLOBAL INDUSTRIAL), 'Supplier Invoice No.' (required), 'Currency' (US Dollar), and 'Remit To' (29833 Network Place, Chicago, Illinois 60673, United States, Address Id BU Business 2). There is also a 'Shipping address' section with 'Attn: Benyl Inyama', '38 suite C-09', '4200 Connecticut Ave NW', 'Washington, DC 20008', and 'United States'. A checkbox for 'Discount, Tax, Shipping & Handling' is at the bottom.

- Review the line item for which you have received the credit. Be sure that you remove all other line items from the credit memo.

1 Line Contains fully invoiced lines

P2200620

Status	PO Line	Item	No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	✓	3 Magnetic Glass Board	T9T695259	EA	~350.06	2	~700.12

- Click **Complete**.

Click **Complete**

All Search (Alt+Q) 0.00 USD Save Complete

Draft

- You will receive a Credit memo confirmation message.

Credit memo Submitted

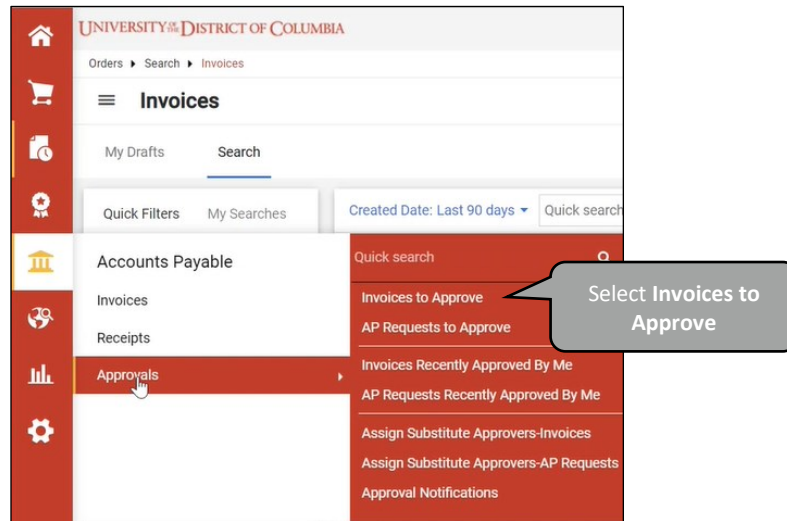
SUCCESS
Invoice was saved successfully

Summary	Create Invoice
Credit memo number: 2191175	Type: Invoice
Credit memo status: Pending	From: PO
Supplier Invoice No.: 222406	PO numbers:
Credit memo name: 2022-09-22 KENNESHAWALSH 01	
Credit memo date: 9/21/2022	
Credit memo total: ~700.12 USD	Create
Number of line items: 1	
Created for the PO No(s): P2200620	

Approving a Credit Memo

Note: Credit memos are located in the same area as invoices.

1. Select **Accounts Payable** from the side navigation menu, select **Approvals**, and then select **Invoices to Approve**.



2. Select the link to the desired invoice to approve.

MY INVOICE APPROVALS 1

INVOICE NO.	SUPPLIER INVOICE NO.	SUPPLIER NAME	ASSIGNED APPROVER	CREATE DATE	PO NO.
2191175	222406	Global Equipment company Inc dba GLOBAL INDUSTRIAL	Robin Sharps	9/22/2022 10:32 AM	P2200620

9/22/2022 No. of Lines: 1

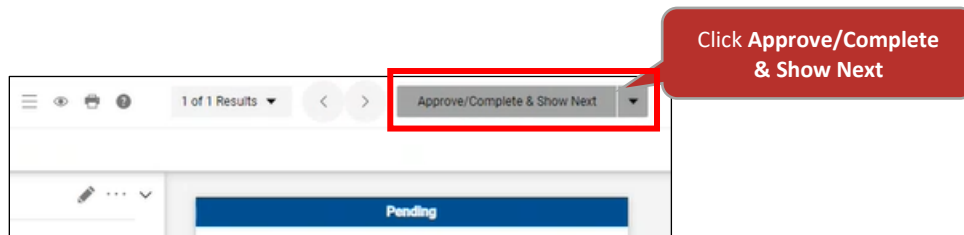
2022-09-22 KENNESHAWALSH 01 Folders 0 D

PO Credit Memo

Invoice Source: Manual


Use the link to the desired invoice

3. Review the details of the credit memo for accuracy. Make adjustments as necessary.
4. Click **Approve/Complete & Show Next**




Appendix A: Quick Reference Guides

Search Tips: Do's and Don'ts



DOs & DON'Ts



of Using the Jaggaer Search Tools

+ DOs

Use Specific Keywords

For more focused search results, use specific key words like "blue shirt" instead of "shirt".

Use Filters

The filter options are located on the left side of the screen. Use them to narrow your search.

Sort the Data

To locate your desired item quicker, use the options in the drop-down tool above the search results.

Use Advanced Search

This is ideal if you are searching for a specific item and you have the appropriate attributes (i.e., Category, Part Number (SKU), Supplier, Manufacturer Name).

Check Spelling

Although the system accommodates misspelled words, it is always better to enter accurate spellings for items.

X DON'Ts

Use Common Words

For better search results, avoid using common words such as shirt, paper, or bottle.

Use Abbreviations

Avoid entering abbreviations, as they are only recognized if they are provided by the supplier.

Use Acronyms

Avoid entering acronyms, as they are only recognized if they are provided by the supplier.

Use Wildcards

Avoid using wildcards like asterisks (*). They are simply not needed and they do not work well in Jaggaer.

Give Up

If you are not yielding the results you would like, try other options such as adjusting your keywords or make use of filters.

Questions?: Contact the Office of Contracting and Procurement

Summary of UDC Purchasing Process



Appendix B: Frequently Asked Questions (FAQs)

1. Are there available reports in Jaggaer that would identify pending documents by funding attributes?
 - a. Jaggaer has a built-in reporting tool call Business Analytics. The UDC Jaggaer administrators can create custom reports using this tool. If you need a specific created report, contact OCP.
2. Is the Jaggaer to Banner budget check valid?
 - a. At the initial GoLive, there may not be requisitions in the system to account for some pending documents. To this end, Jaggaer to Banner budget check *may not* be fully accurate. If you notice any discrepancies, contact OCP.
3. Can I return a completed requisition?
 - a. The simple answer is no. Once the requisition is completed, the workflow is also completed. Therefore, you cannot return the requisition.
4. Can I approve requisitions through my email?
 - a. Yes, you can approve requisition through your email, but you will need to first set up an approval code. Specifically, you will receive an email whenever a requisition needs your approval. The email message will contain a link that you can click to take action. Once you select that link, you will be prompted to enter your approval code. Afterwards, click **Approve**.
5. When I create a change request on a PO, will a new PO number be created?
 - a. No. After the process is complete, the requested changes will be merged with the old PO number and then send the updates to Banner.
6. What is the invoice number for student stipends related to direct payments?
 - a. For student stipends, there is no invoice number. Typically, it will be noted as SPRING[YEAR] or the actual date.
7. How many characters can be included in the Jaggaer supplier invoice number field?
 - a. Though Banner allows up to 35 characters, Jaggaer limits the number of characters to 30.
8. When entering invoice numbers in the Jaggaer supplier invoice number field, should spaces be included?
 - a. Yes, spaces between characters are permitted.
9. Can I edit a rejected invoice or requisition?
 - a. No. If the invoice or requisition is rejected, the submitter would need to create and submit a new form.

10. The supplier I would like to use is marked inactive in Jaggaer. What does that mean?
- When a supplier is marked inactive in Jaggaer, they are not available for use when shopping. If you feel this is in error, contact OCP at procurement@udc.edu.
11. Where can I find the approved approvers for my department?
- You can view the list of approvers and the actual workflow on the right-hand side of your requisition prior to submission.

The screenshot shows a requisition form for requisition 3617152. The form is divided into several sections: General, Shipping, Billing, Accounting Codes, and Internal/External Notes and Attachments. A red callout box on the right side of the form points to the 'What's next for my order?' section, which displays the workflow steps: Draft, Banner Budget Authorization 1, Department Approval, and Budget Analyst Approval. A red speech bubble next to the callout box contains the text 'View approvers and workflow'.

Requisition • 3617152

Summary Taxes/SAH PO Preview Comments 2 Attachments History

General **Shipping** **Billing**

Cart Name 2022-10-04 LAURIEHILLSTOCK 01 **Ship To** no address **Bill To** no address

Description no value **Required** **Required**

Priority Normal **Delivery Options** **Billing Options**

Prepared by Laurie Hillstock Expedite X Accounting Date no value

Prepared for Laurie Hillstock Ship Via Best Carrier Best Way

Requested Delivery Date 10/7/2022

Accounting Codes

Chart	Index	Fund	Organization	Program	Account	
1	University of the D. C.	1036C	101105	101F	0	10
	Postage	Appropriated Funds	Agency Fiscal Operations	Revenue		Assets

Internal Notes and Attachments **External Notes and Attachments**

What's next for my order?

Next Step Department Approval

Approvers Connell, Brian Layne, Roy

Workflow

Draft Active Laurie Hillstock

Banner Budget Authorization 1 Future

Department Approval Future

Budget Analyst Approval Future

View approvers and workflow

12. Where can I find a list of UDC commodity codes?
- Please check with your departmental budget analyst.
13. Where can I find the UDC accounting codes?
- Please check with your departmental budget analyst.