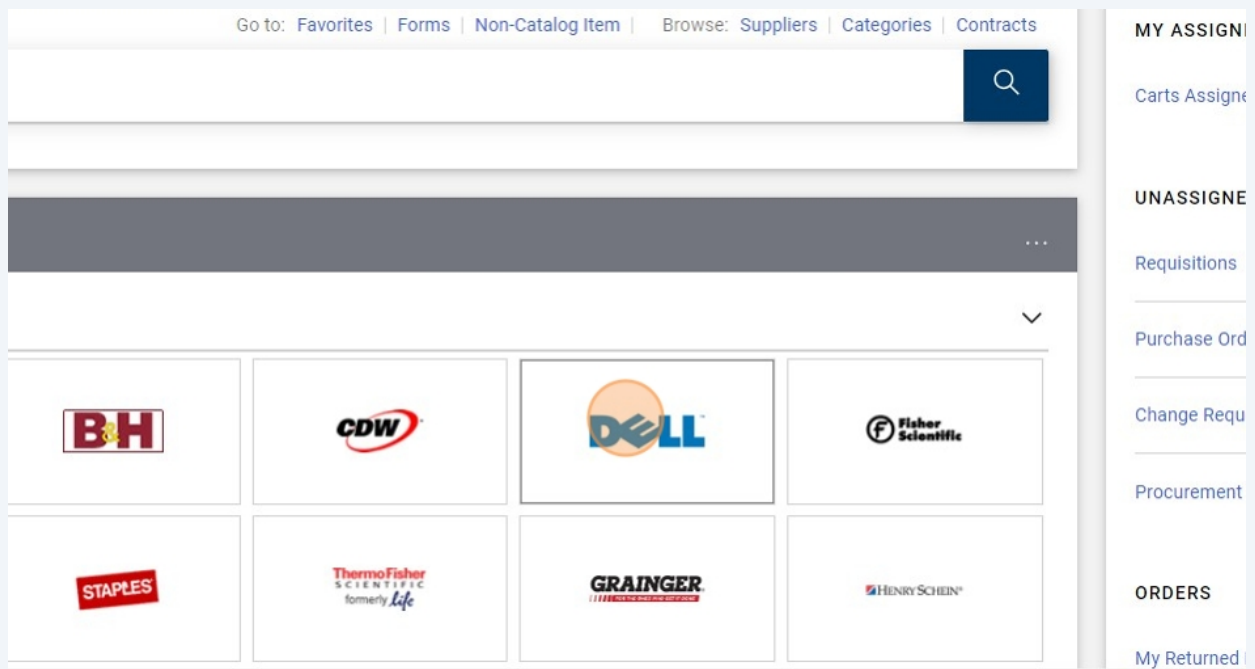


How to Create an Order for IT-Related Items with Notes

IT requires the following information to be added to each Jaggaer Requisition for IT-related products. This requirement applies all Dell requisitions, and any other vendor requisitions allocated to an IT object code.

- 1 For Dell, punch out using the Dell tile.



The screenshot shows a procurement system interface. At the top, there is a navigation bar with links: "Go to: Favorites | Forms | Non-Catalog Item | Browse: Suppliers | Categories | Contracts". Below this is a search bar with a magnifying glass icon. The main content area displays a grid of vendor tiles. The tiles are arranged in two rows and four columns. The first row contains tiles for BH, CDW, DELL (highlighted with a blue border), and Fisher Scientific. The second row contains tiles for STAPLES, ThermoFisher Scientific (formerly Life), GRAINGER, and HENRY SCHEIN. On the right side of the interface, there is a sidebar menu with the following sections: "MY ASSIGNMENTS" (with sub-items: Carts Assignments, UNASSIGNED Requisitions, Purchase Orders, Change Requisitions, Procurement), and "ORDERS" (with sub-item: My Returned Orders).

2 Click "Quotes" to access the quote number provided by IT.

The screenshot shows the Dell Premier website interface. At the top left is the Dell Technologies logo. To its right is a search bar labeled "Search Dell Premier". Below the logo and search bar is a navigation menu with items: Shop, Artificial Intelligence, Solutions, Deals, and Account. A second navigation bar contains Procurement Integrations, Quotes (highlighted with an orange circle), Recent Online Orders, Help, Order Status, and Custom Links. Below this is a breadcrumb trail: Home / Standard Configurations. The main heading is "Standard Configurations". Underneath, it says "Lewis-Clark State College NASPO ValuePoint PADD 16200012 / WN11AGW". A light blue banner contains a message: "1 configuration will be retiring within the next 6 months. Click here to view your retiring configurations". At the bottom, there is a "Categories" dropdown menu, a small image of a server, and the text "Name: Standard Desktop (OptiPlex SEE 7020 w/Auto".

3 Enter the Quote number here.

The screenshot shows the "Quotes" page in the Dell Premier system. The top navigation bar includes Procurement Integrations, Quotes (highlighted with an orange circle), Recent Online Orders, Help, and Order Status. Below the navigation is a breadcrumb trail: Home > Quotes. The main heading is "Quotes". A grey instruction box says: "Choose the quotes you'd like to purchase from the list below or search for an eQuote (by entering Sales Quote Number).". Below this is a search bar with the placeholder text "Search by sales quote number or eQuote name, number, creator" and a magnifying glass icon. Below the search bar is a table with the following headers: Name, Number, Created, and Authorized Buy.

4 Click on the quote number, or on the "View Details" button.

Choose the quotes you'd like to purchase from the list below or search for an eQuote (by entering the eQuote (by entering Sales Quote Number).



Name	Number	Created	Authorized Buyer
Diana Test Quote	<u>3000182414504</u>	dlhiggins@lcsc.edu October 21, 2024	Diana Higgins

5 Click "Create Order Requisition."

e

[Save as New eQuote](#) [Create Order Requisition](#) [Continue Shopping](#)

Summary

	Standard Desktop (OptiPlex SFF 7020 w/Autopilot) Specs	\$1,183.75
Quantity 1		
	Dell 24 Monitor - P2425H	

6 Click here to dismiss this question.

How will these products be used? *

Office

Where will these products be used?

I do not want to export outside the United States

I want to export outside the United States

Confirm Change

7 Click "Submit Order Requisition"

How easy was it to create this order requisition?

Very Difficult

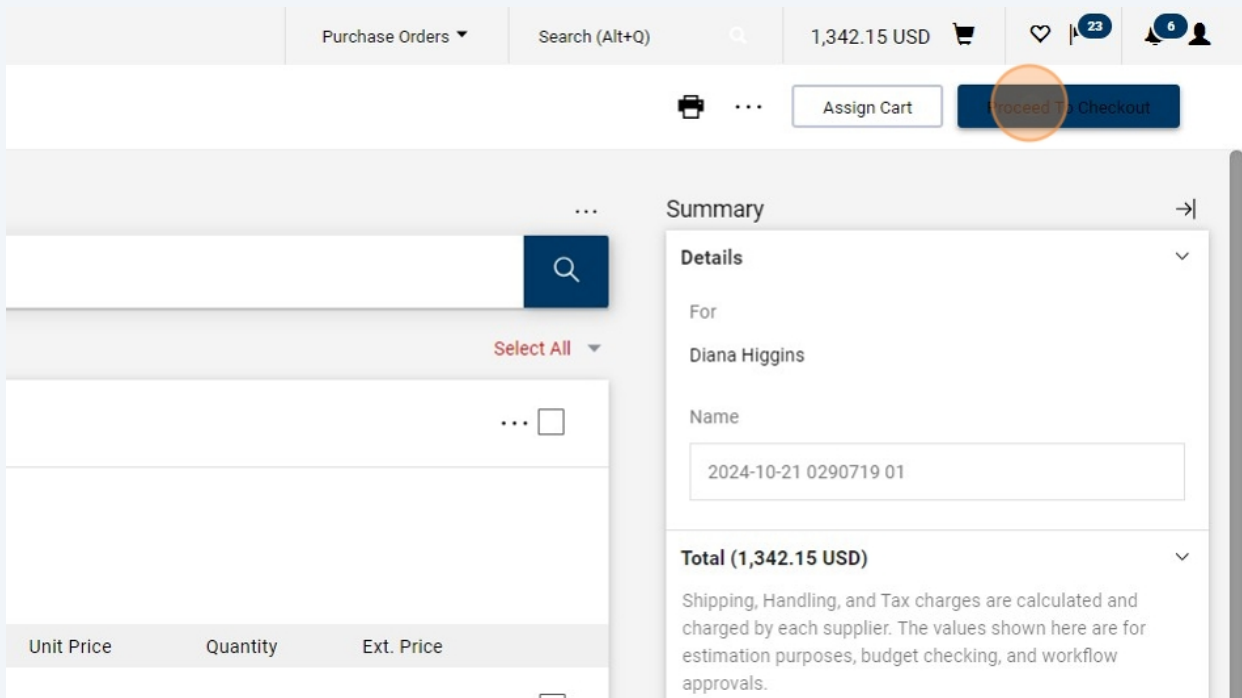


Very Easy

Submit Order Requisition

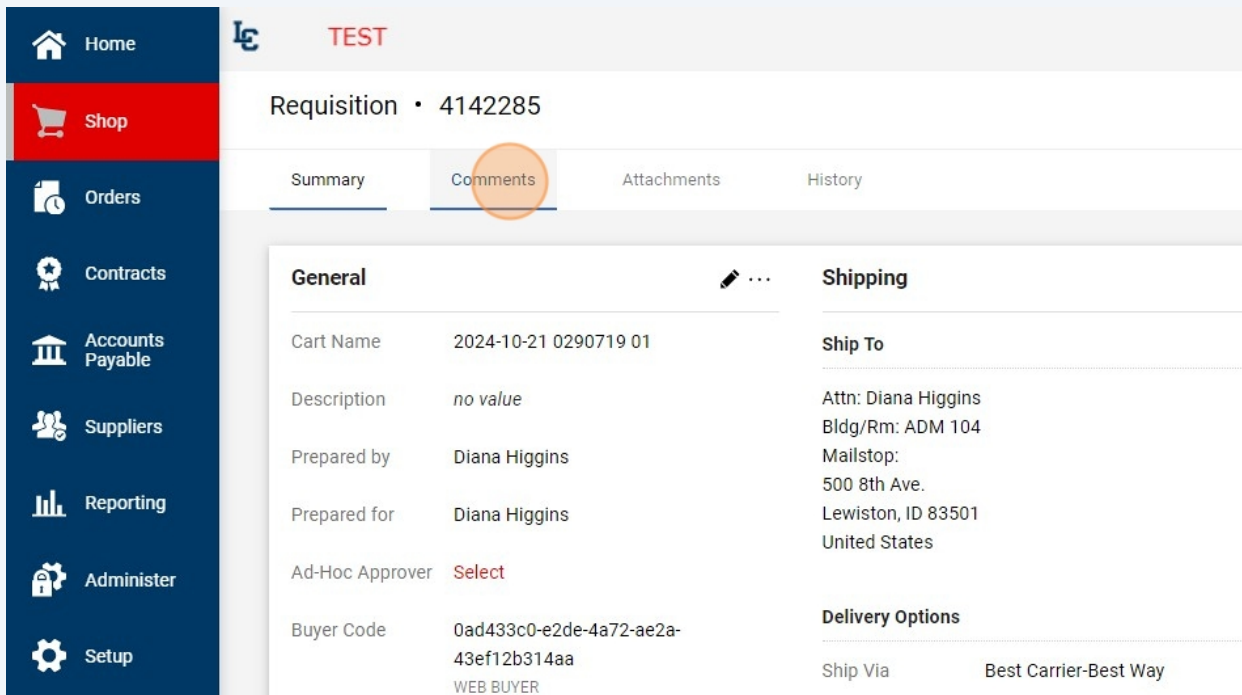
Contact Us

8 Back in Jaggaer, click "Proceed To Checkout."



The screenshot shows the Jaggaer checkout interface. At the top, there is a navigation bar with "Purchase Orders" and a search bar. The total amount is 1,342.15 USD. Below this, there are buttons for "Assign Cart" and "Proceed To Checkout", with the latter highlighted by an orange circle. The main content area is split into a table on the left and a "Summary" panel on the right. The table has columns for "Unit Price", "Quantity", and "Ext. Price". The "Summary" panel includes a "Details" section with the name "Diana Higgins" and a "Total (1,342.15 USD)" section with a note about shipping and tax charges.

9 Click "Comments"



The screenshot shows the Jaggaer requisition details page for requisition 4142285. On the left is a dark blue navigation sidebar with icons for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area has a header with "TEST" and "Requisition • 4142285". Below the header are tabs for "Summary", "Comments", "Attachments", and "History", with "Comments" highlighted by an orange circle. The main content is divided into two columns: "General" and "Shipping". The "General" column contains fields for "Cart Name", "Description", "Prepared by", "Prepared for", "Ad-Hoc Approver", and "Buyer Code". The "Shipping" column contains a "Ship To" section with address details and a "Delivery Options" section with "Ship Via" set to "Best Carrier-Best Way".

10 Click this button to open the comment field.

The screenshot shows a software interface with a top navigation bar containing 'Purchase Orders', a search bar, and a cart icon with '1,342.15 USD'. Below the navigation bar are buttons for 'Assign Cart' and 'Place Order'. A 'Show comments for' dropdown menu is set to 'Requisition', with a '+' icon and a 'New Comment' button highlighted. To the right, a 'Summary' section is titled 'Draft' and contains two error messages: 'Correct these issues. You are unable to proceed until addressed.' with sub-errors for 'Fund', 'Function', and 'Cost Center'; and 'Be aware of these issues. You may review and proceed.'

11 Type a comment for each item on the PO, indicating whether the item is needed by a certain date (new hire) or is urgent (employee without a computer or monitor), or simply replacing something (current one is still functional).

The screenshot shows a software interface with a left sidebar containing navigation items: Orders, Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area has tabs for 'Summary', 'Comments', 'Attachments', and 'History'. The 'Comments' tab is active, showing 'Records found: 0'. Below this is an 'ADD COMMENT' form with a text area containing 'Line 1: New employee, start date 11/15/24' and 'Line 2:'. A '+' icon is highlighted over the text area. To the right of the text area are labels for 'Attach file (optional)', 'Attachment Type', 'File Name', and 'File'. Below the text area, it says '950 characters remaining' and 'expand | clear'. A note at the bottom states: 'Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.'

12 Click this button when you've typed the comment to save it.

The screenshot shows a web interface for a requisition. At the top right, there are buttons for 'Assign Cart' and 'Place'. Below this, a 'Show comments for' dropdown menu is set to 'Requisition'. A modal window is open, showing a text input field and two radio buttons: 'File' (selected) and 'Link/URL'. A blue checkmark icon in a circle is circled in orange, indicating the save button. To the right, a 'Summary' panel shows a 'Draft' status and two sections of issues: 'Correct these issues' (with a red 'x' icon) and 'Be aware of these issues' (with a yellow warning icon). The 'Correct these issues' section lists 'Required: Fund', 'Required: Function', and 'Required: Cost Center'. The 'Be aware of these issues' section lists 'Empty: Object Code' and 'Empty: Project ID'.

13 Click "Summary" to go back to the body of the req.

The screenshot shows a web interface for a requisition. On the left is a dark blue sidebar with navigation icons and labels: Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area has a header with 'TEST' and 'Requisition • 4142285'. Below the header are four tabs: 'Summary' (circled in orange), 'Comments' (with a blue '1' badge), 'Attachments', and 'History'. The 'Summary' tab is active, showing 'Records found: 1' and a single record by 'Diana Higgins - 10/21/2024 2:10:08 PM'. The record details are: 'Line 1: New employee, start date 11/15/24' and 'Line 2: For Diana, replaces current monitor that is functional'.

14

Click this button to update the Ship To address if you are not located on the main Lewiston campus. (If you are on campus, disregard.)

Purchase Orders ▾ Search (

Attachments History

11

Shipping **Billing**

Ship To **Bill To**

Attn: Diana Higgins
Bldg/Rm: ADM 104
Mailstop:
500 8th Ave.
Lewiston, ID 83501
United States

Lewis-Clark State College
Controller's Office
500 8th Avenue
Lewiston, ID 83501
United States

Delivery Options **Billing Options**

Ship Via Best Carrier-Best Way Accounting Date no value

ae2a-

15

Select the Main Campus address if you are not located on the main Lewiston campus. (If you are on campus, disregard.)

Administer Setup

Ad-Hoc Approver Se
Buyer Code 0e
43
W
Bank Code VI
97

Address Line 1	500 8th Ave.
City	Lewiston
State	ID
Zip Code	83501
Country	United States

Main - Diana Higgins, ADM 104, [Mailstop], 500 8th Ave., Lewiston, ID 83501, Unite

default - Diana Higgins, ADM 104, [Mailstop], 500 8th Ave., Lewiston, ID 83501, Un

Main Campus - Diana Higgins, ADM 104, [Mailstop], 500 8th Ave., Lewiston, ID 835

Accounting Codes

Cost Center

no value
Required

Internal Notes and

★ Required fields

Internal Note no value Note to all Supplier

Menu Search

16 Click "Save"

The screenshot shows a software interface with a modal window in the foreground. The modal window has a 'Save' button highlighted with an orange circle and a 'Close' button. In the background, a summary panel on the right contains the following text:

- not have permission to access this field: Function
- Required: Cost Center
- Be aware of these issues.
- You may review and proceed.
- Object Code
- Project ID
- 2.15 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
- 1,342.1
- 1,342.1
- Next Step IT Review
- Approvers Chilson, Sean
- Powered by JAGGAER | Private

17 Click the three dots to assign cost center info at the line level.

The screenshot shows a software interface with a table and a summary panel. The table has the following columns: 'aging', 'Unit Price', 'Quantity', and 'Ext. Price'. The first row has the value '1,183.75' under 'Unit Price' and 'Qty: 1 EA' under 'Quantity'. The 'Ext. Price' column has the value '1,183.75'. A 'three dots' menu icon is highlighted with an orange circle next to the 'Ext. Price' value. Below the table, there are sections for 'Internal Note' (no value), 'Internal Attachments' (Add), 'External Note' (no value), and 'Attachments for' (Add). The summary panel on the right contains the following text:

- Summary
- Draft
- Correct these issues.
- You are unable to proceed until addressed.
- Required: Fund
- You do not have permission to access this field: Function
- Required: Function
- You do not have permission to access this field: Function
- Required: Cost Center
- Be aware of these issues.
- You may review and proceed.
- Empty: Object Code
- Empty: Project ID
- Total (1,342.15 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



If all items are on the same cost center and using the same object code, you can enter this information at the header level and skip to step

18 Click "Accounting Codes"

The screenshot displays a shopping cart interface with a table of items and a dropdown menu. The table has columns for Unit Price, Quantity, and Ext. Price. The first item has a unit price of 1,183.75, a quantity of 1 EA, and an extended price of 1,183.75. The second item has a unit price of 158.40, a quantity of 1 EA, and an extended price of 158.40. A dropdown menu is open over the first item, listing options: Override, Ship To, Delivery Options, Bill To, Accounting Codes (highlighted with a red circle), Remove, Add to Favorites, Move to Another Cart, and Add to Draft Cart or Pending PR/PO. The total amount shown is 1,342.15.

Unit Price	Quantity	Ext. Price
1,183.75	Qty: 1 EA	1,183.75
158.40	Qty: 1 EA	158.40

Required: Fund
You do not have permission to access this field: Fund
Required: Function
You do not have permission to access this field: Function
Required: Cost Center

Override
Ship To
Delivery Options
Bill To
Accounting Codes
Remove
Add to Favorites
Move to Another Cart
Add to Draft Cart or Pending PR/PO

1,342.15
1,342.15

What's next for my order?

19 Click here to enter cost center.

Home TEST

Override Line 1: Accounting Codes

Cost Center ★	Object Code	Project ID
905101		
905101 - Purchasing		

★ Required fields

1	OptiPlex Small Form Factor (7020);OptiPlex Small Form Factor 7020	210-BKWK	EA
^ ITEM DETAILS			
Manufacturer	Dell	Contract:	no value

Administer Setup

20 Click here to enter object code.

Home TEST

Override Line 1: Accounting Codes

Cost Center ★	Object Code	Project ID
905101	55580	Test123
	55580 - Computer Equipment <\$2k	

★ Required fields

1	OptiPlex Small Form Factor (7020);OptiPlex Small Form Factor 7020	210-BKWK	EA
^ ITEM DETAILS			
Manufacturer	Dell	Contract:	no value

Administer Setup

21 Click "Save"

The screenshot shows a software interface with a table and a summary panel. The table has columns for values and quantities. The summary panel on the right contains error messages:

- You do not have permission to access this field: Function
- Required: Cost Center
- Be aware of these issues. You may review and proceed.
- Empty: Object Code
- Empty: Project ID
- Total (1,342.15 USD)

A 'Save' button is highlighted with an orange circle, and a 'Close' button is visible next to it.

22 Click this button to repeat for the next line.

The screenshot shows a software interface with a table and a summary panel. The table has columns for values and quantities. The summary panel on the right contains error messages:

- Correct these issues. You are unable to proceed until addressed.
- Required: Fund
- You do not have permission to access this field: I
- Required: Function
- You do not have permission to access this field: I
- Required: Cost Center
- Be aware of these issues. You may review and proceed.
- Empty: Object Code
- Empty: Project ID
- Total (1,342.15 USD)

A button with three dots is highlighted with an orange circle. A tooltip is visible over this button: "Line Item Actions for Dell 24 Monitor - P2425H;Dell 24 Monitor - P2425H".

23 Click "Accounting Codes"

The screenshot shows a software interface with a dropdown menu open. The menu items are: Override, Ship To, Delivery Options, Bill To, Accounting Codes (highlighted with an orange circle), Remove, Add to Favorites, Move to Another Cart, and Add to Draft Cart or Pending PR/PO. The background shows a table with columns for amount, quantity, and price. A message at the top right states: "Required: Function. You do not have permission to access this field: Function. Required: Cost Center".

24 Click here to enter cost center.

The screenshot shows a software interface titled "Override Line 2: Accounting Codes". It features three input fields: "Cost Center ★", "Object Code", and "Project ID". The "Cost Center" field contains "9051" and has a search icon. A dropdown suggestion "905101 - Purchasing" is visible below the field, highlighted with an orange circle. Below the fields, there is a section for "Required fields". At the bottom, a table shows item details for "Dell 24 Monitor - P2425H".

25 Click here to enter object code.

Home TEST

Override Line 2: Accounting Codes

Cost Center ★	Object Code	Project ID
905101	55580	Test123

★ Required fields

2	Dell 24 Monitor - P2425H;Dell 24 Monitor - P2425H	210-BMGH	EA
---	---	----------	----

ITEM DETAILS

26 Click "Save"

158.40 Qty: 1 EA 158.40

Internal Note no value

Internal Attachments Add

You do not have permission to access this field. Function Required: Cost Center

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

Empty: Object Code

Empty: Project ID

Total (1,342.15 USD)

27

Click "Place Order"

The screenshot shows a procurement system interface. At the top, there is a navigation bar with 'Purchase Orders' (dropdown), 'Search (Alt+Q)' (with a magnifying glass icon), and a total amount of '1,342.15 USD' (with a shopping cart icon). On the right side of the navigation bar, there are icons for a heart, a notification bell with '23', and a user profile icon with '6'. Below the navigation bar, there is a toolbar with icons for eye, printer, help, and a menu. Two buttons are present: 'Assign Cart' and 'Place Order'. The 'Place Order' button is highlighted with an orange circle. Below the toolbar, there is a table with columns 'Unit Price', 'Quantity', and 'Ext. Price'. The table contains one row with values '1,183.75', 'Qty: 1 EA', and '1,183.75'. To the right of the table, there is a 'Summary' panel. The summary panel has a purple header 'Draft' and a section 'Total (1,342.15 USD)' with a dropdown arrow. Below this, there is a note: '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.' The summary table shows 'Subtotal' as '1,342.15' and a total of '1,342.15'. Below the summary, there is a section 'What's next for my order?' with a dropdown arrow, showing 'Next Step' and 'IT Review'.

Unit Price	Quantity	Ext. Price
1,183.75	Qty: 1 EA	1,183.75

Summary →

Draft

Total (1,342.15 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	1,342.15
	1,342.15

What's next for my order? ↓

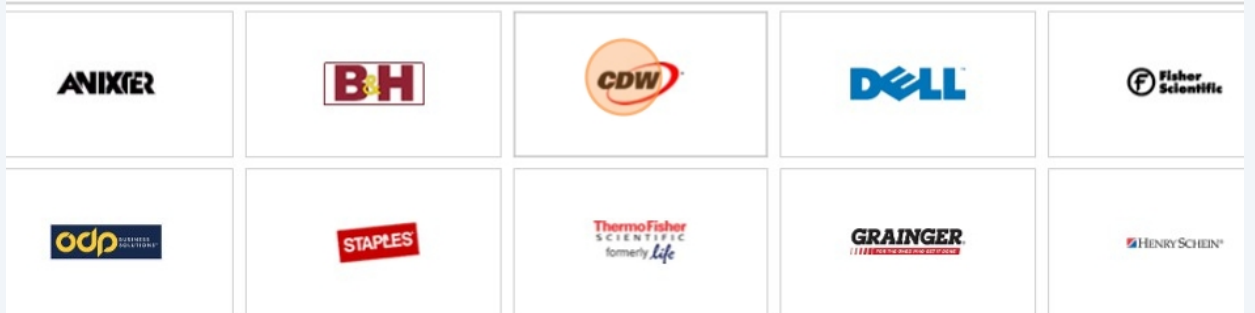
Next Step IT Review











How to Place an Order Requisition in Shopping Dashboard

1 Click this image. to punch out through CDWG.

Go to: [Favorites](#) | [Forms](#) | [Non-Catalog Item](#) | Browse: [Suppliers](#) | [Categories](#) | [Cor](#)

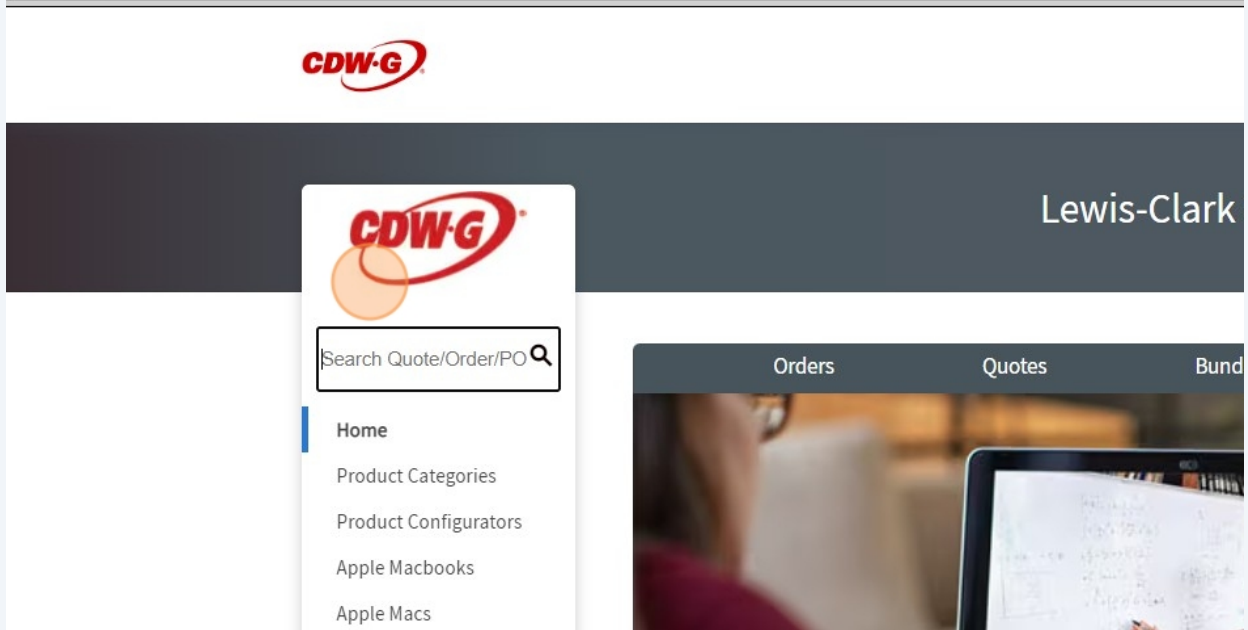
ms, part number, etc.



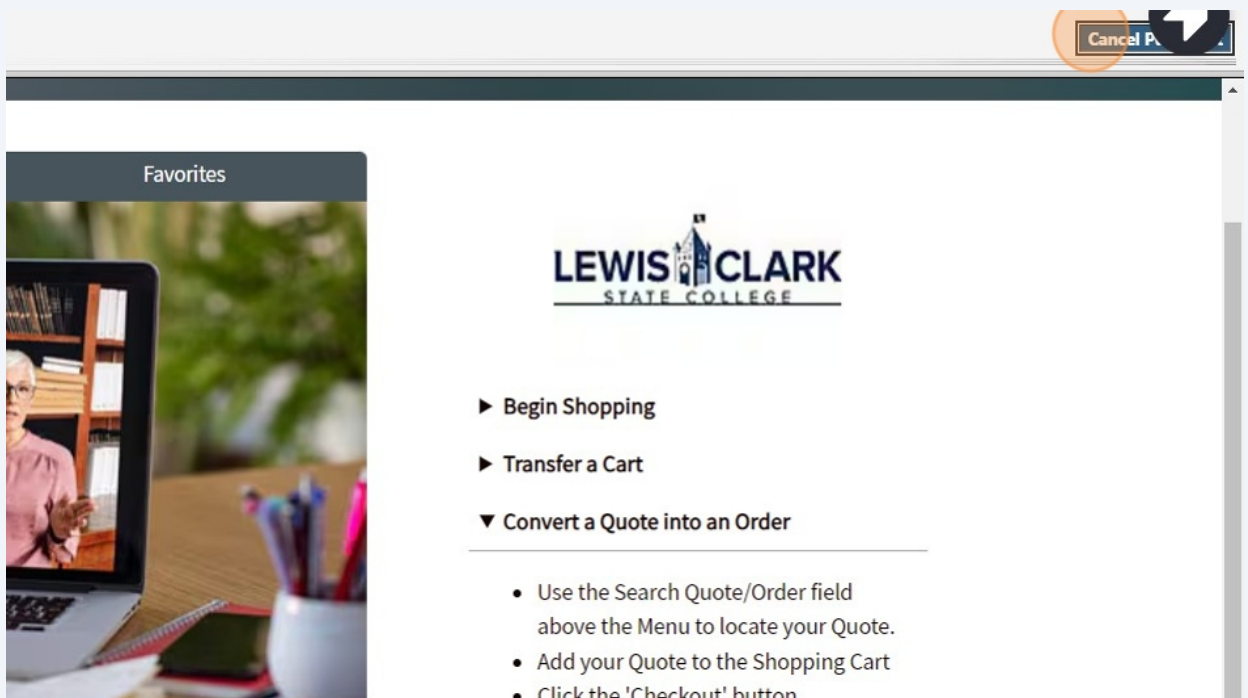
				
				

2 Click the "Search Quote/Order/PO" field and enter your quote number.

PunchOut



3 There are detailed instructions on the site.

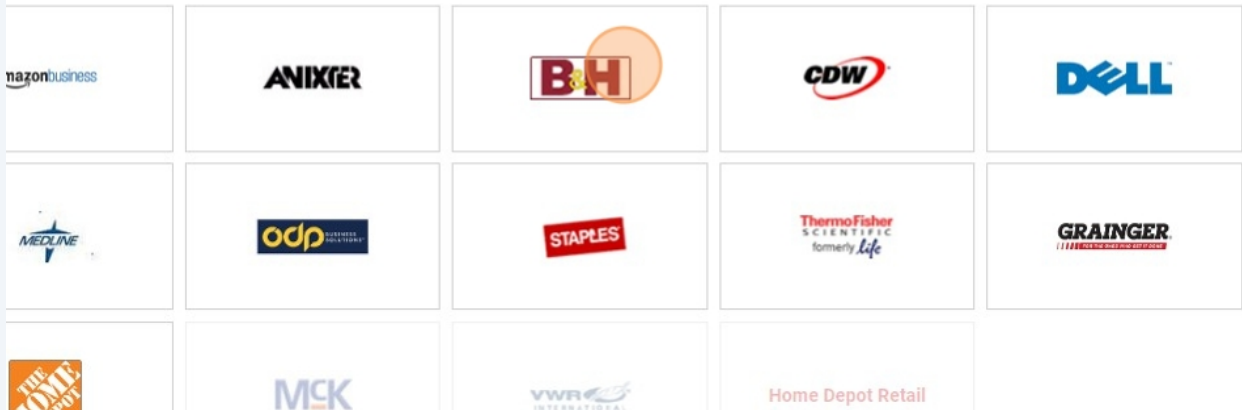


4 Click this image to punch out through B&H Photo.

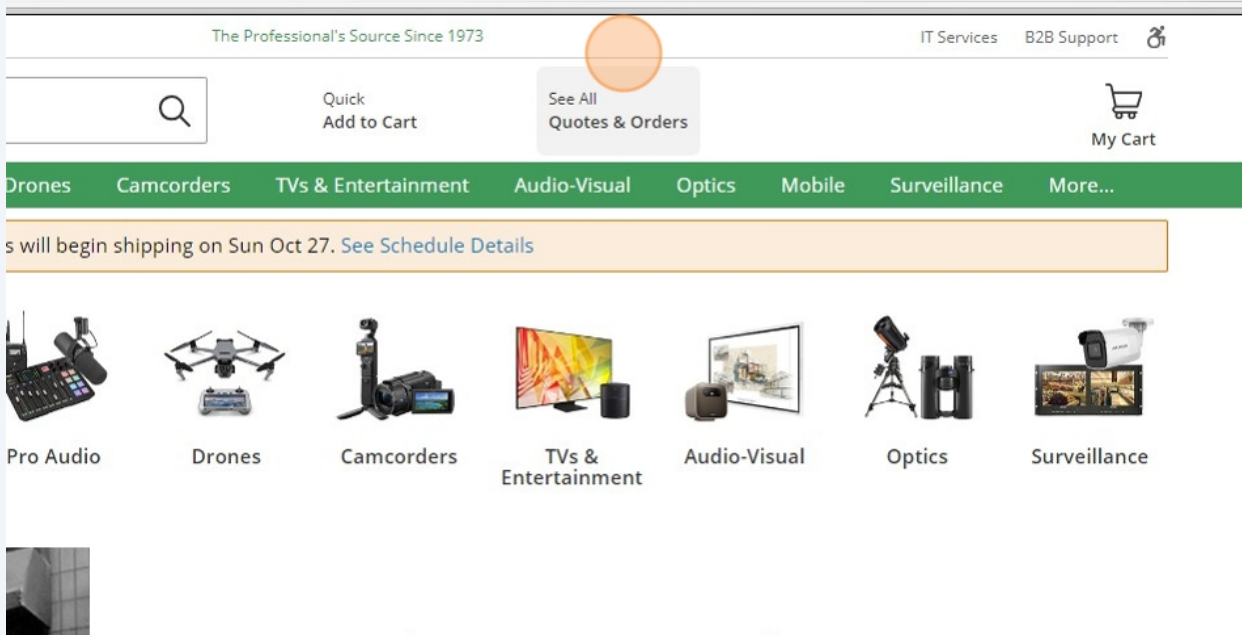
or products, suppliers, forms, part number, etc.

es

Catalogs



5 Click "See All Quotes & Orders."



6

Enter your quote information. Note: You will need to provide the phone number of the person who provided the quote, and the Customer ID. Both are available on the quote.

Order / Quote Lookup

To locate an order or quote that was submitted by phone, chat, in-store or online, please enter the phone number you provided and your order/quote number.

Phone Number / Customer ID

Order Number / RMA / Quote Number

Find Your Order / Quote