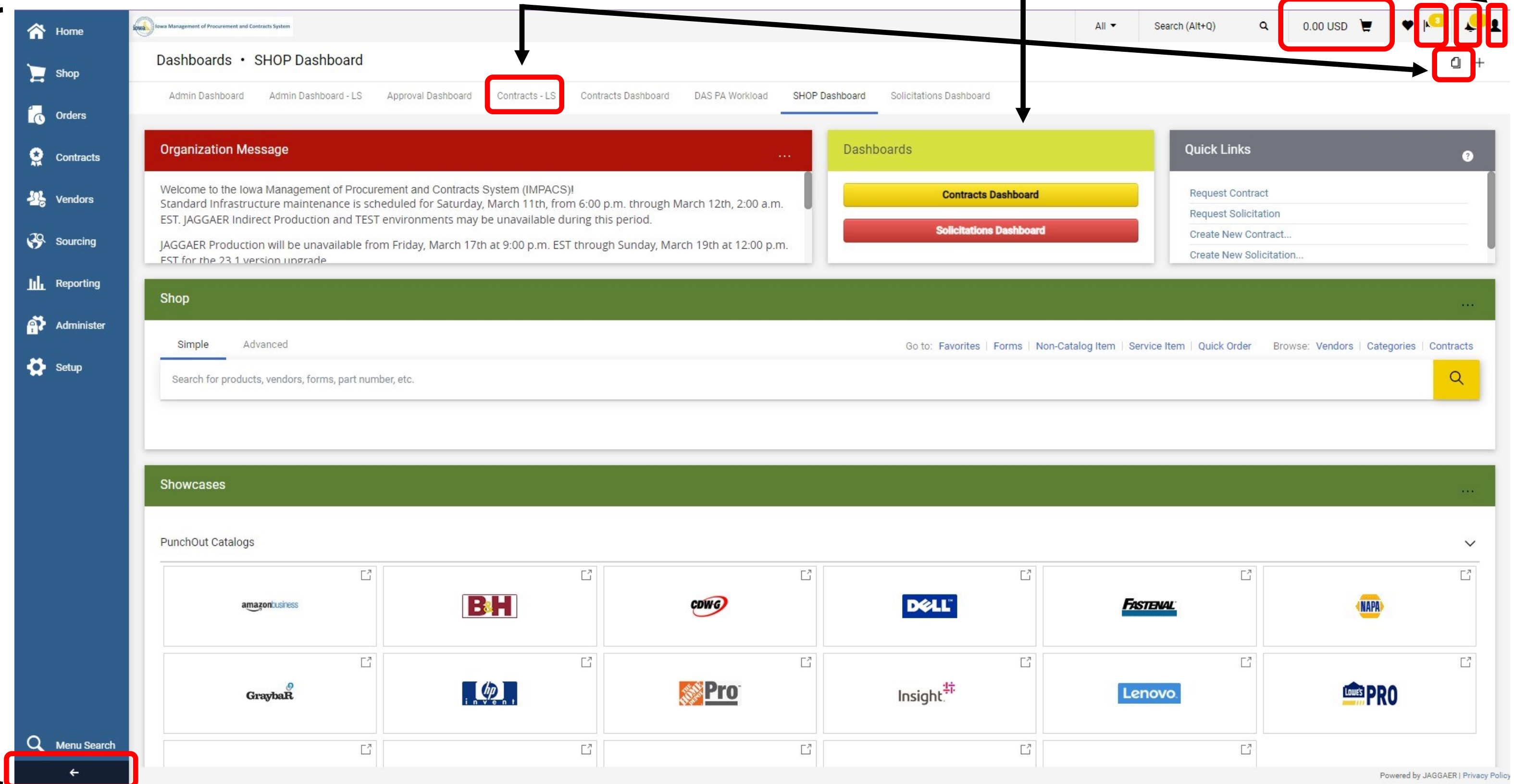
Iowa Management of Procurement and Contracts System

Jaggaer Quick Reference Guide



The SHOP Dashboard above is the default screen for many Users. You may navigate to other Dashboards or create your own. Once you copy the Dashboard on the screen, it becomes your own personal Dashboard with any name you choose. You will be able to add different Widgets or change the placement of the Widgets. Set your personal Dashboard in your Profile as your home page. You may make multiple personal Dashboards.

Please see the IMPACS User Guides for detailed information about Purchasing, Creating & Evaluating Solicitations and Creating & Managing Contracts. The guides are located at the Department of Administrative Services—Central Services Website: https://das.iowa.gov/procurement

Shopping

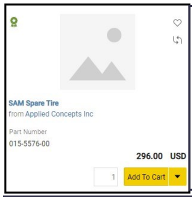
Log onto IMPACS (Jaggaer) https://login.iowa.gov/app/UserHome

Select either the DAS Jaggaer TEST sticker (sandbox) or the DAS Jaggaer PROD (live site) sticker.

Navigation Menu - The Home icon brings you back to your default (Home) Dashboard. Take note of the **Organization Message.** It often has alerts and important dates listed.

Shopping and Forms from the SHOP Dashboard

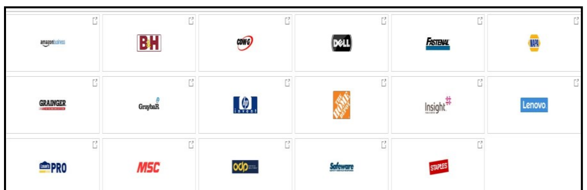
SHOP Contracts using the search bar (simple or advanced search) and type in the keywords for the product or service. Users may filter by vendor, packaging, etc.



Product or services boxes pop up that describe the product/service, pricing and have a quantity box for the user to fill in. The User may reference the contract by clicking on the green ribbon in the upper left corner of the box. Once the quantity is selected, the Users clicks **Add to Cart**. The down arrow next to the **Add To Cart** button has additional actions.

SHOP PunchOut Vendors

Click on the PunchOut Vendor Stickers in the Showcase to shop at the Vendor's website. The pricing listed will be contract pricing. After selecting your products and services you will be routed back to your shopping cart . From there you may create a purchase requisition or assign someone to do that for you.

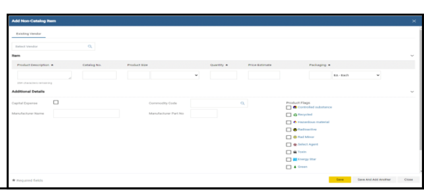


e-Procurement Forms

Access Emergency Procurement Justification; IT Procurement and Sole Source Justification forms by clicking on the stickers in the Showcase section of the SHOP Dashboard.

Purchase Forms

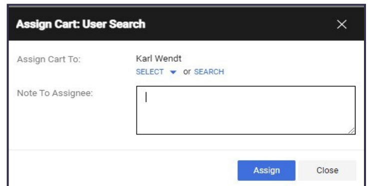
If the User encounters a $0.00 item box, they may fill out the **Non-Catalog Item** form located as a link on the SHOP search bar. Users will need to research the product/service information from the contract if using this method and use that information to fill out the form.



Assigning a Shopping Cart

If you are a Purchasing Agent, you may skip this step.

If a User has not been assigned a cart assignee or approver for your cart during IMPACS onboarding, you may select someone to create the purchase requisition for you. Select the **Assign Cart** Button from your shopping cart.



The **User Search** box opens, and you may select or search for an assignee from there and add a comment. The request will be routed to the appropriate assignee, a purchase order will be created and sent to the vendor for fulfillment.

Assignee Actions

Once a cart is routed to an assignee, the assignee must complete any remaining required fields and review the order prior to submitting the requisition for approval. **View Assigned Carts** by clicking on the action items icon (flag) on the top right of the page, then select **Carts Assigned to Me.**

1. **Click on the cart name** to open the cart then click **Proceed to Checkout**.
2. **Complete any remaining required fields** and click the **Place Order** button.
3. View the **What's next for my order** section to view the approval process status.

Approver Actions

Approvers are assigned to the requisition approval workflow based on the Agencies business rules. Approvers can approve in the following ways:

1. From the Approval Dashboard and select **Requisitions to Approve**
2. View your action items (flag icon) and select **Requisitions to Approve**
3. Click on the link at the bottom of the notification email that you receive.

To Approve...

1. **Navigate to the requisition** using one of the three methods above.
2. **Click on the requisition number** to view the requisition details
3. **Click Document Actions** on top right of the screen and select **Approve/Complete** or **Assign to Myself** for other actions.
4. Other actions include: rejecting, returning and placing the PR on hold. The **three dots** next to the button lists more options.
5. View the **What's next?** area of the PR to view the remaining approval workflow steps.

Assign Substitute Approver

Steps for when it is necessary to assign a substitute to approve for you.

1. Navigate to the Approvals Dashboard.
2. Find the Quick Link Widget called **Assign Substitute Approver** (see Widget below).
3. Select the Approval Type (i.e. Requisitions, Contracts, etc.)
4. Select the button for **All Folders** or only selected folders by clicking the **Substitute Actions** button.
5. Assign the Substitute Approver by searching for their name. You may specify the date and time range by checking that box when selecting the substitute's name.
6. You may end the substitution at any time by returning to the widget and clicking the **End Substitute for Folders** button.

Definitions

Approver—Approvers are one of two types, either a Departmental Approver or a Special Approver. Departmental or Agency approvers are responsible for reviewing and approving the requisition on behalf of the Department. Special approvers are responsible for reviewing the order based on their specific responsibilities.

Assignee (Purchasing Agent, Buyer)— can review purchase requisitions and are ultimately responsible for completing mandatory fields.

Cart – an area where the products and/or services the shopper has selected to purchase is listed. Clicking on the shopping cart icon in the upper right of the screen will open the shopping cart.

Catalog Vendor– A vendor that has either a hosted catalog setup or a PunchOut setup within IMPACS that lists the items on contract with contract pricing.

Hosted catalog – a catalog of products vendors maintain in IMPACS that are searchable via the SHOP search bar.

IMPACS -Iowa Management of Procurement and Contracts System . A procurement and purchasing tool that uses Jaggaer e-procurement software. Managed by the State of Iowa—Department of Administrative Services—Central Services -Central Procurement .

Invoice– Vendor invoices will be sent to the "Bill To' address on the Purchase Requisition. Accounting departments shall pay using their current workflow (I/3, EFT, PCard, Check, etc.). Accounts Payable is not activated in IMPACS.

Jaggaer – e-procurement software company. Pronounced like Mick Jagger.

Non-Catalog Item Form – a form used to add products and services to a cart from a vendor that does not have a hosted catalog/PunchOut setup, or the contract items are listed as $0.00, or you are using a quote from a non-catalog vendor.

PunchOut – a vendor website that allows users to show on the vendor's website using contract pricing. Users click on the vendor sticker in the SHOP Dashboard section of IMPACS.

Purchase Order (PO) – generated after a purchase requisition has been approved. The PO is automatically sent to the vendor to initiate the purchase.

Purchase Requisition (PR) – a cart that has been reviewed and submitted by a User. The requisition goes through an approval workflow for review.

User—All Users are shoppers. Users can search and add products and services to their cart. A Shopper can only assign their cart to a assignee (Purchasing Agent, Buyer or Approver) to review

Definitions

The Vendor cannot be found in the search bar on the Non-Catalog Item Form— work with your Purchasing Agent ,Buyer or Department IMPACS Administrator to invite the vendor to register in IMPACS. Go to the Vendor Tab in the Navigation Menu and select Add Vendor. Fill out the form.

I need to change or cancel my order - work with your Purchasing Agent , Buyer or Department IMPACS Administrator. The vendor may need to be notified or a new order placed.

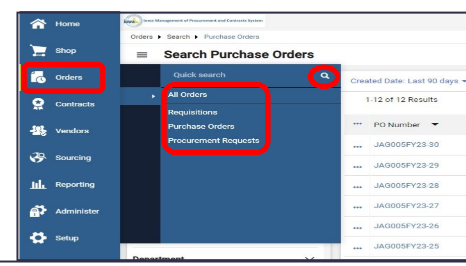
I need to change the accounting codes for the purchase- work with your Purchasing Agent ,Buyer or Department IMPACS Administrator to change the accounting codes on the Purchase Requisition or Purchase Order.

I need to return items - please notify the vendor about the return and advise your Purchasing Agent ,Buyer or Department IMPACS Administrator.

I have an invoice what do I do? - Accounting departments shall pay using their current workflow (I/3, EFT, PCard, Check, etc.). Accounts Payable is not activated in IMPACS.

Order Tracking

Users may track purchase requisitions, purchase orders and procurement requests from the Orders Tab in the Navigation Menu. You may type in keywords or PR/PO numbers in the search bar as well.



Questions? - Contact purchasing.mailbox@iowa.gov or call 515-330-7325