FALCONS PURCH

November 1, 2021

Falcons Purch Manual

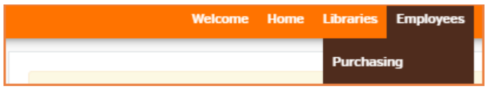
The Falcons Purch software (Jaggaer) is the BGSU E-procurement system used for shopping, requesting purchase orders, electronic approvals, order distribution to suppliers tracking delivery information, issuing payments, and processing invoices. The system is managed by the BGSU Purchasing Department. Training and refresher trainings are offered multiple times throughout the year and on an as needed basis. Email purchasing@bgsu.edu to schedule training.

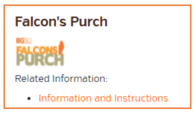
Table of Contents

Setting up a User Profile in Falcons Purch 3
Creating Shopping Carts from Catalogs 6
Creating Non-Catalog Requests 9
Making Payment Requests 10
Submitting an Order 12
Approver Instructions 15
Creating a Delivery Receipt 18
Searching for Orders & Other Documents 19

User Profile Settings

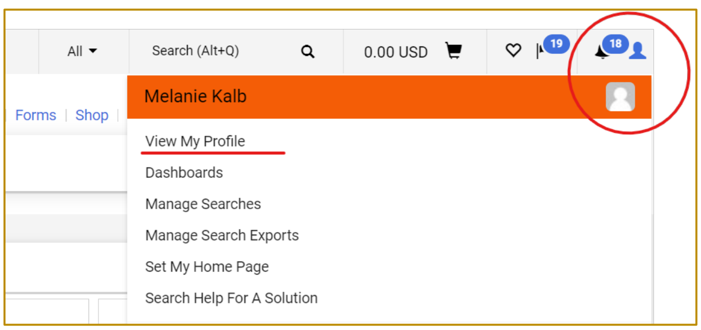
Log in to myBGSU. Click on the Employees tab > Purchasing. Click on the BGSU Falcons Purch logo



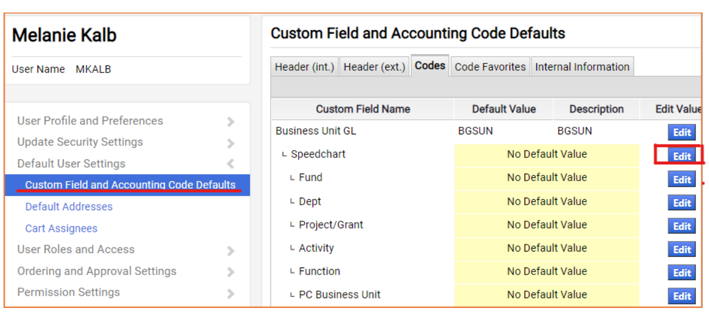


Profile Settings

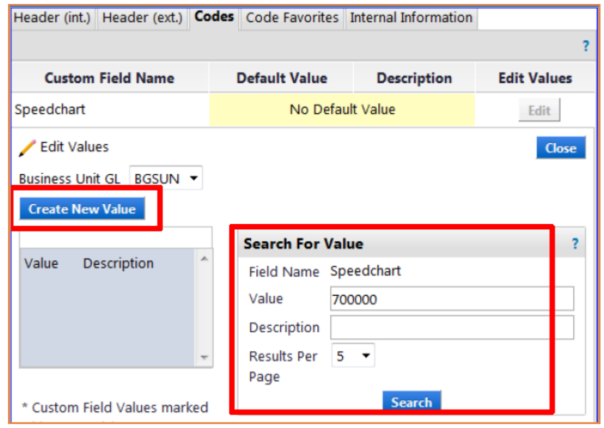
To set up your default profiles settings click on the silouette in the upper right corner of the Homepage. Select View My Profile to access the profile settings.



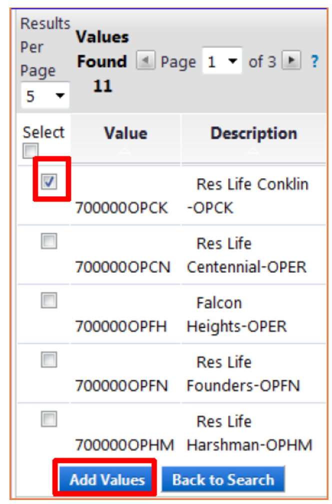
Click on Default User Settings. To set up a default Speedchart and account, select Custom Field and Accounting Code Defaults. On the right select the Codes tab and then Edit from the value you want to set.



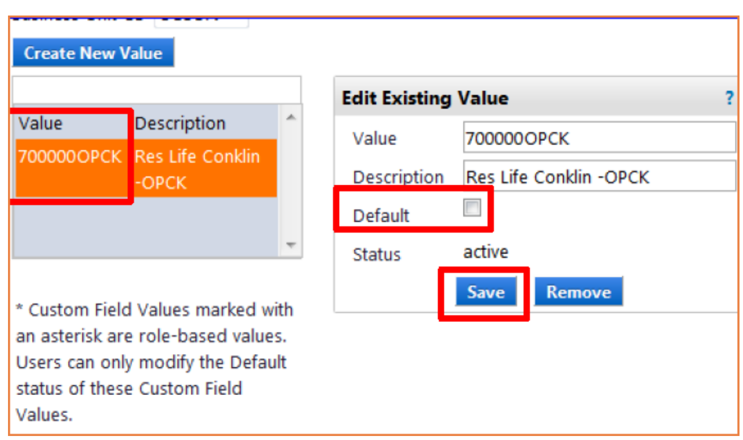
Click Create New Value. Enter your 6-digit department number in the Value field and click on Search.



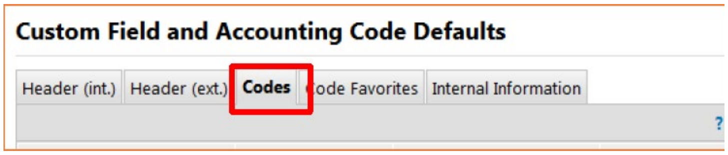
Select the speedchart by clicking on the box. Select Add Values.



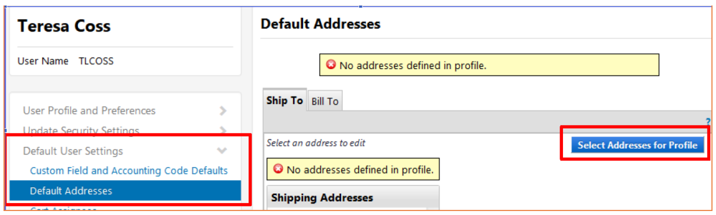
Click on the Value you just added (700000OPCK), checkmark Default and Save. You can continue to add multiple speedtypes to your list.



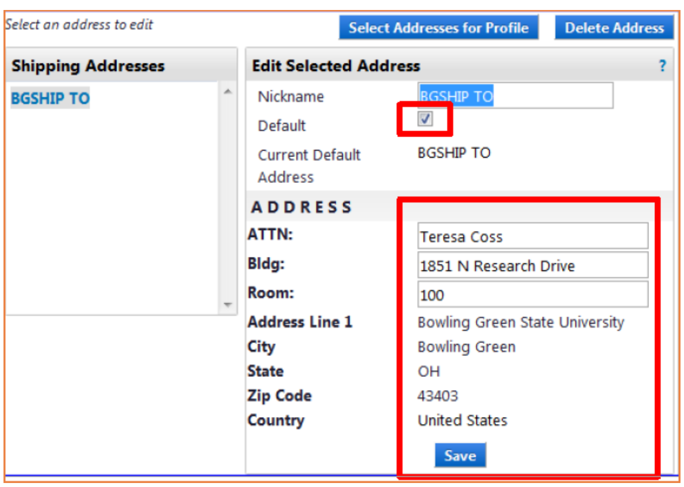
Click on the Codes tab to add a default Account (53100).



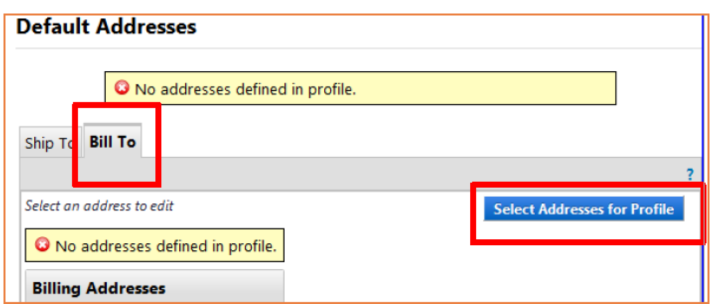
Under Default User Settings select Default Addresses. From the Ship To tab, click on Select Addresses for Profile.



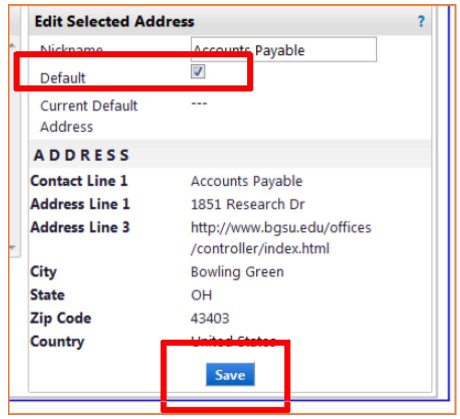
A dropdown box will appear, select BGSHIP TO. Checkmark the Default box. Enter your building and room number. Save



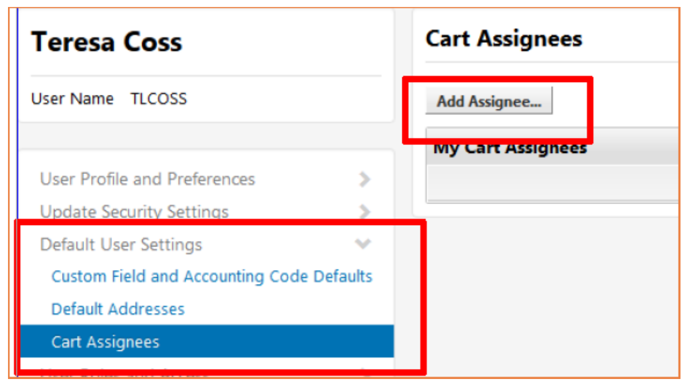
Go to the Bill To tab and click on Select Addresses for Profile. Choose Accounts Payable from the dropdown.



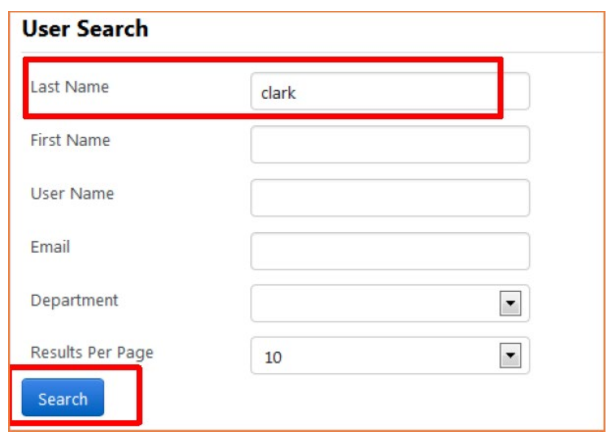
Mark as default and Save.

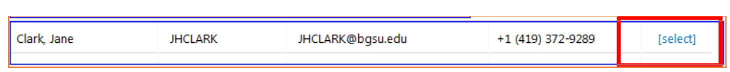


To add a default for your Cart Assignees, select Cart Assignees and click Add Assignee…



From the pop up window, enter the last name of the individual you would like to assign your carts to. Search and then select the name.



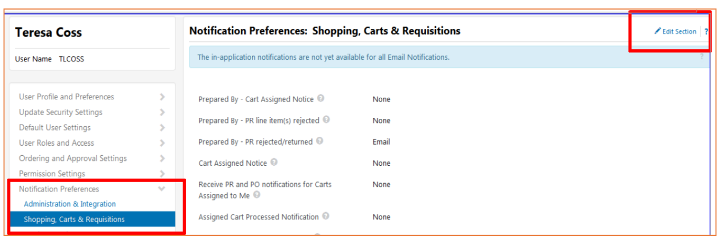


Select Set as Preferred.

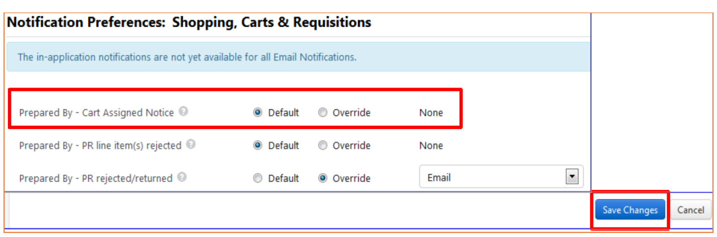
Notification Preferences

The E-mail Preferences screen is used to determine when and why you will receive e-mail notifications and/or notifications in the top menu bar.

Select Notification Preferences, select Shopping, Carts & Requisitions. Click on Edit Selection in the upper right corner.

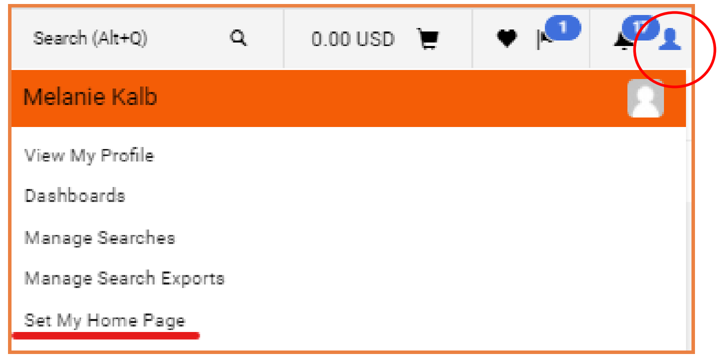


The Default setting is None, meaning there will be no emails or notifications. Click on Override to change the setting. When done, click on Save Changes in the lower right corner.

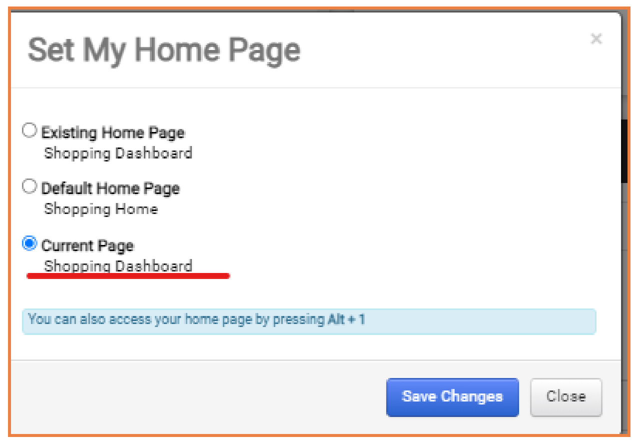


Dashboards

Dashboards provide visibility to all system features on the home screen of Falcons Purch. Click on the silhouette and select Set My Home Page.

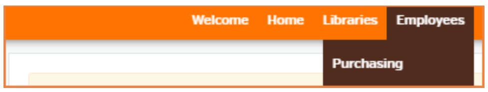


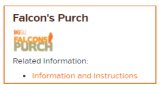
Choose Current Page/Shopping Dashboard. Click Save.



Shopping with Catalog Suppliers

Log in to myBGSU. Click on the Employees tab > Purchasing. Click on the BGSU Falcons Purch logo.

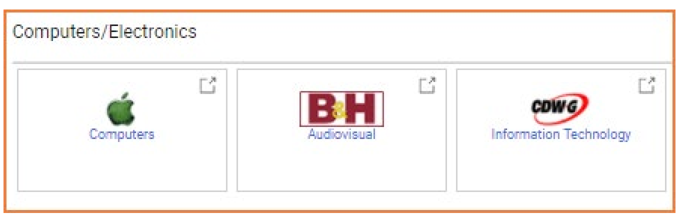




The first page of the shopping experience displays a search field and punchout catalogs.

Punchout Catalogs

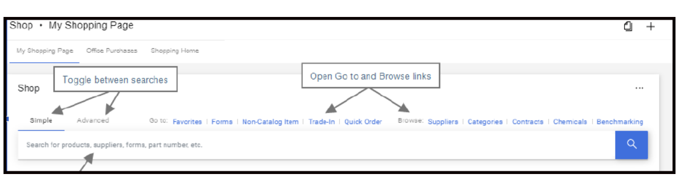
Punchout catalog suppliers have provided stores within Falcons Purch that will allow users to shop from the supplier's external website. The shopping cart created will generate a cart in Falcon's Purch for approvals and budget information.



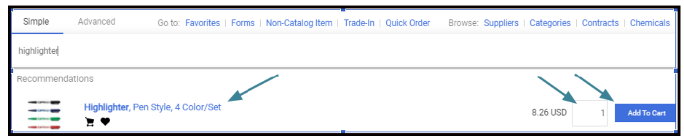
Hosted Catalogs

Hosted catalog suppliers provide searchable catalogs of contracted goods and services offered by suppliers within the Falcons Purch site for easy searching and entry of orders.

In the search field, users enter key words for the items to purchase, then click the search icon. Users can search for contracted items in the shopping search bar. Simple and Advanced tabs along the top of the search field allows users to toggle between simple and advanced search pages.



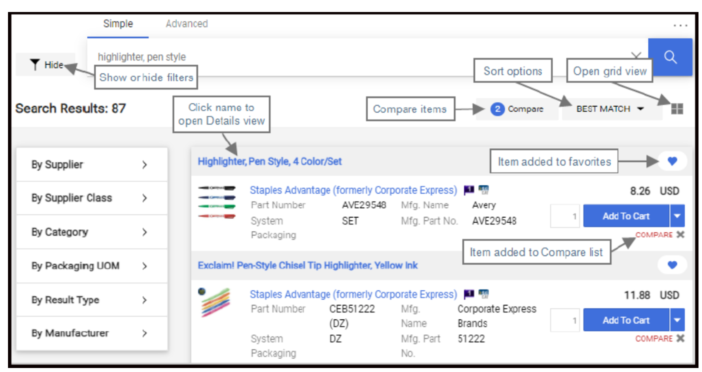
Click the Search icon to generate a search. An Add To Cart button allows users to add an item or request directly to their cart. An Add and Checkout option on the drop-down menu will take users directly to the Checkout/Requisition



Search Results

Items that match the search criteria are displayed on the search results page. On this page users can:

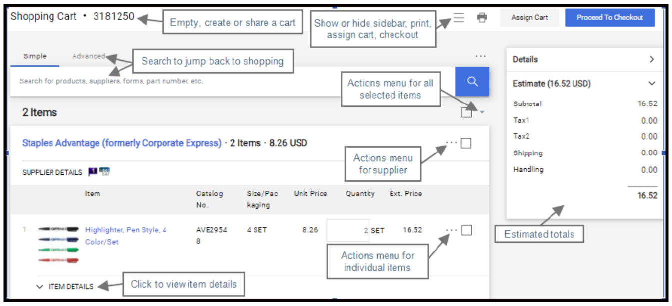
- Search for additional items using the search field at the top of the page.
- Apply multiple search filters in the left sidebar to narrow search results.
- Choose different sorting preferences from the BEST MATCH menu.
- Click on an item to display product details.
- Compare products.
- Add items to their Favorites.



Cart

The shopping cart contains items a user has selected to purchase. Users can add or remove items, change commodity codes, adjust quantities, and view an estimated total purchase amount.

All goods, services, forms must be added to the shopping cart for processing. The cart must be submitted after all items are added to the cart. If multiple vendor purchases are added to the cart, the system will separate the orders as needed when distributing to the suppliers.

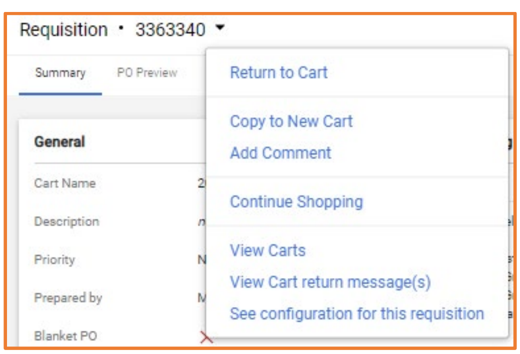


Proceed to Checkout

The checkout action creates the purchase requisition. The purchase requisition allows someone with the requester role to add chart fields, comments, attachments, make edits and place the order.

Tabs at the top of the page contain additional information about the document. Items are listed in the bottom section.

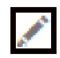
Document actions are available in the top left corner of the page. Click the drop-down menu next to the requisition number to see a list of actions that can be taken for the document.



Other actions are available in the top right corner of the page:

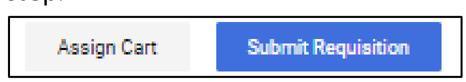
-  Show or hide the right sidebar.
-  Select an option from the Filter View drop-down menu to view individual sections on the page. For example, view header details only, view line items only, or view billing details only.

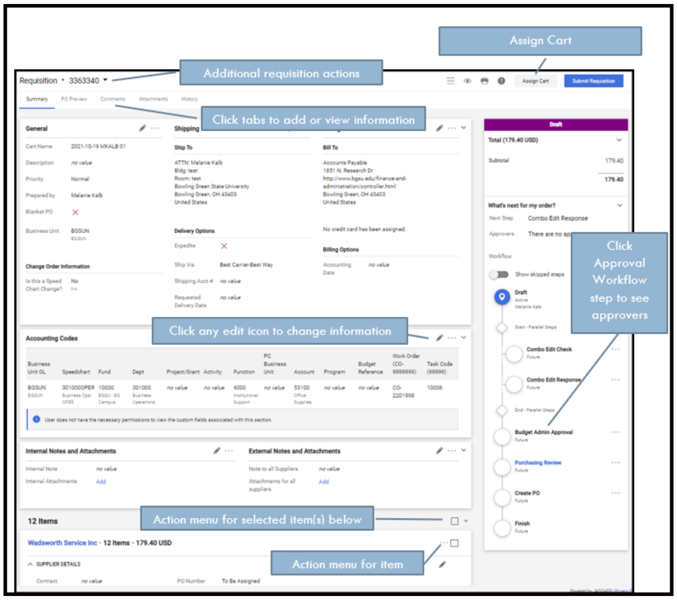
In the Line Items section, the actions menu for all selected items is the drop-down menu at the top right corner of the section. On individual items, click the action icon to see actions that can be applied to that item only.

Click tabs to view and  edit information within them. Click the edit icon to modify information in a section.

The right sidebar shows document totals and workflow. The document status and any messages are displayed near the top of the section. Users can view approval workflow information in the What's next for my order? section.

Select one of the action buttons to go to the next step.



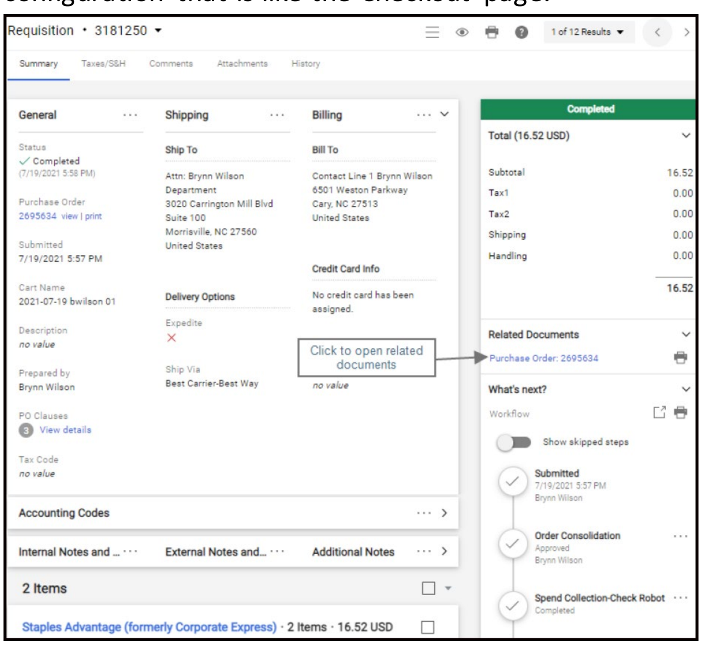


Assign Cart to Another User

Users that have the shopper role will only be able to assign the cart to a user that has a requestor role to place the order with the proper chart codes.

Submitted Requisitions

Submitted Requisitions are displayed in a document configuration that is like the Checkout page.



Icons

Click to display actions for items in a panel or page

Click to edit information

Collapse section

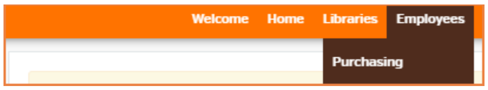
or Expand section

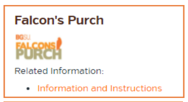
Click to add an item to Favorites

Item is a user's personal Favorite

Shopping with Non-Catalog Suppliers

Log in to myBGSU. Click on the Employees tab > Purchasing. Click on the BGSU Falcons Purch logo.





Definitions

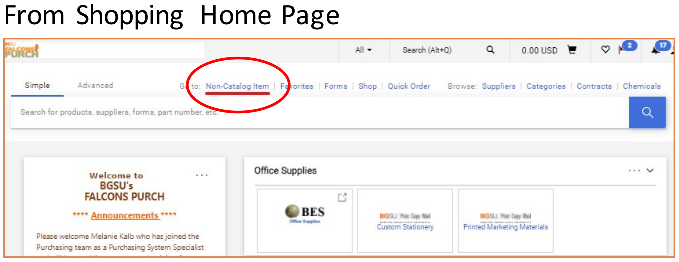
Non-catalog item- A shopping form that used when the supplier does not have either a hosted catalog or punchout Catalog. A quote from the supplier is required to be attached to the order.

Blanket Purchase Order - form used when an order will be have multiple shipments or services throughout the year.

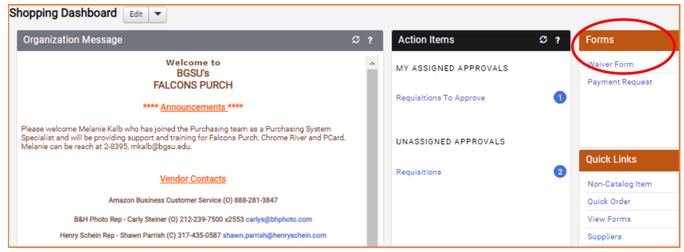
Payment requests- A form used when an invoice is provided prior to the service such as a membership or subscription. Payment requests can also be used when an ICA or master agreement is already in place and payment needs to be processed for services rendered.

Non-Catalog Item Shopping Form

From Shopping Home Page

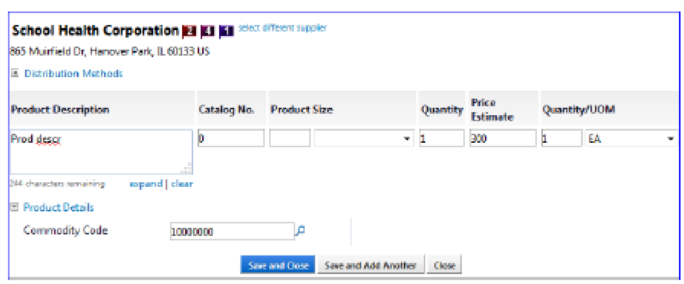


From Shopping Dashboard

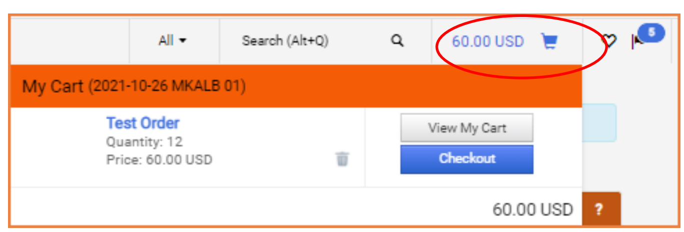


Chose the Non-catalog link on the home page. Complete the required fields on the form. If no catalog no. exists, enter N/A or 0. Size is not a required field. Select the correct commodity code the is relevant to the item(s) being ordered. To see the entire list commodity code options, click search. Select the correct code.

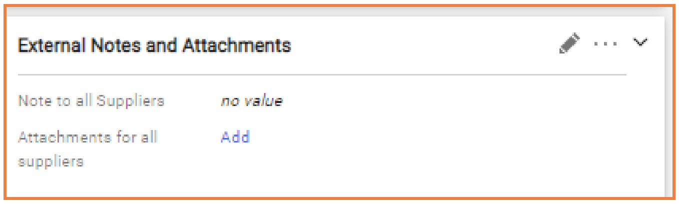
For goods use the accurate quantity of items being ordered combined with the UOM of EA. For services use the total price and the UOM of USD. To create multiple lines on the order, click on Save and Add Another. After all lines have been entered, select Save and Close.



shopping cart, then Checkout.

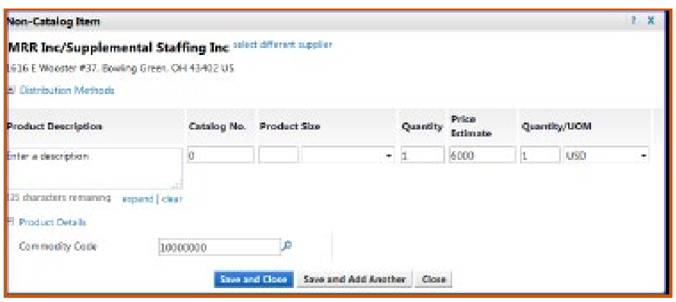


Attach the quote to the requisition in the External Notes and Attachments section.

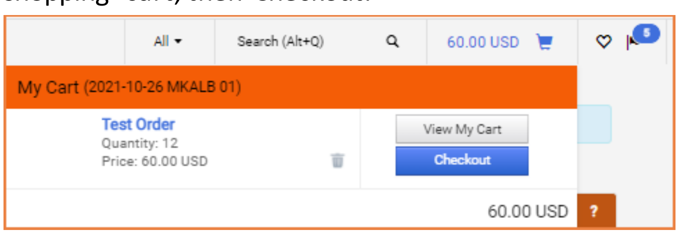


Blanket Purchase Orders

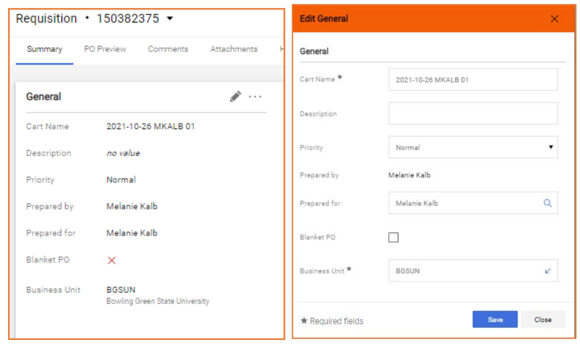
Complete a non-catalog item form using a quantity of 1, the total amount of the blanket should be used as the price, select USD for the unit of measure. Enter an estimated amount if the exact total is not known. Click Save and Close.



Proceed to the upper right-hand corner. Select the shopping cart, then Checkout.



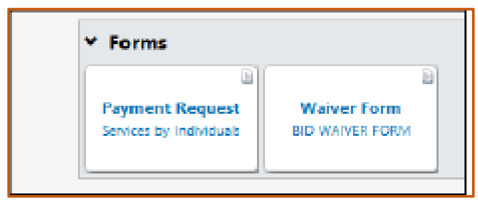
Select the Summary tab and then Edit (Pencil Icon) in the General section. Check the Blanket PO box.



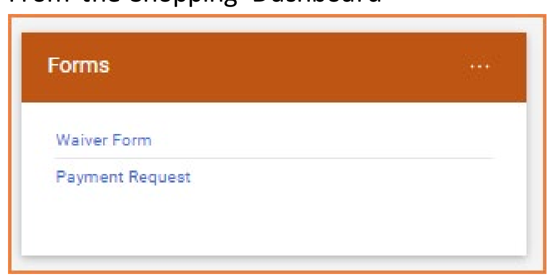
Payment Requests

When paying a vendor for services/goods that have already been provided, you will need to submit the electronic payment request in Falcon's Purch. From the home page, scroll down to the bottom of the page and click on Payment Request.

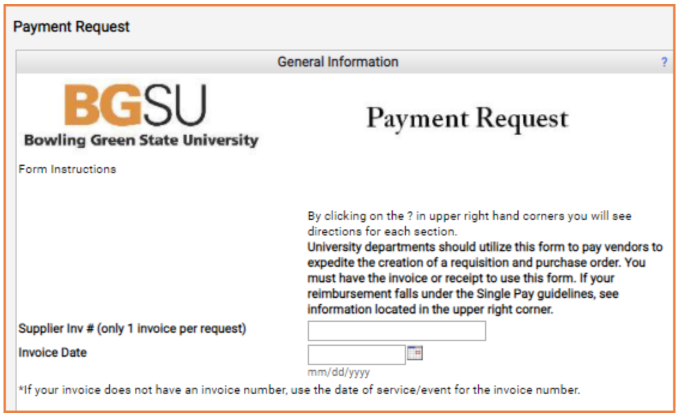
From the Shopping Home Page



From the Shopping Dashboard



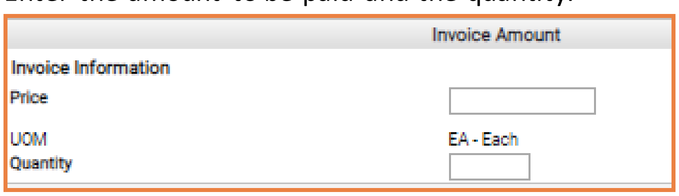
Complete the form. Please note that the Supplier Inv # field can contain only numbers, letters, forward slash (/) and hyphen (-). If there is no invoice number, enter the date of service. If there is no invoice date, enter the date of service.



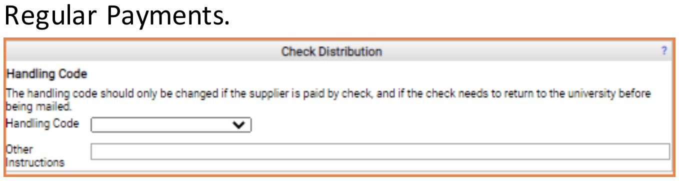
Click on Supplier Search to locate the vendor that needs to be paid.

Select the remit to address that is shown on the supplier's invoice.

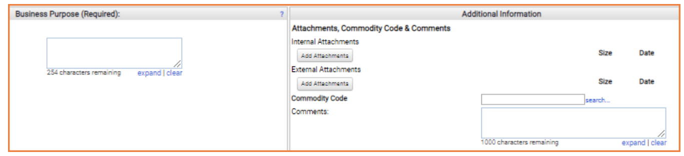
Enter the amount to be paid and the quantity.



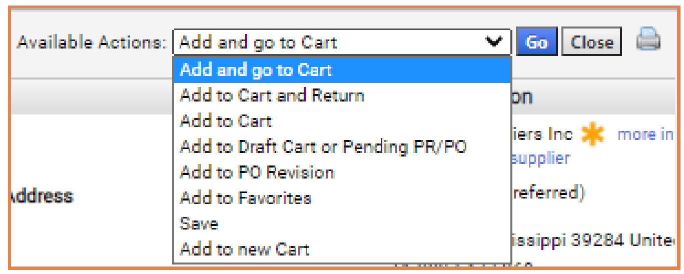
Select the Type of Payment and enter a Handling Code for the check distribution. If there are no specific instructions for Handling Code, select RE Regular Payments.



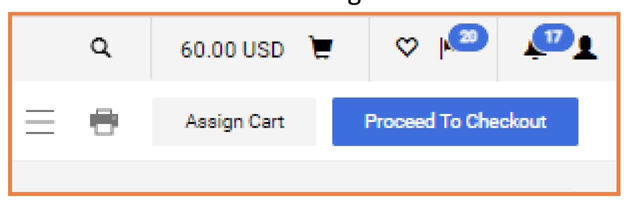
Enter the Business Purpose for the payment, this includes who, what, why, where and when. Attach supporting documentation, and select a commodity code.



After completing the form, scroll to the top of the page to Add and go to Cart.



Proceed to checkout or assign cart to another user.



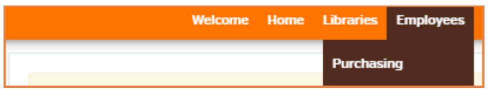
See Instructions for Placing an Order.

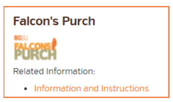
Icons

- Click to display actions for items in a panel or page
- Click to edit information
- Collapse section
- or Expand section
- Click to add an item to Favorites
- Item is a user's personal Favorite

Placing an Order

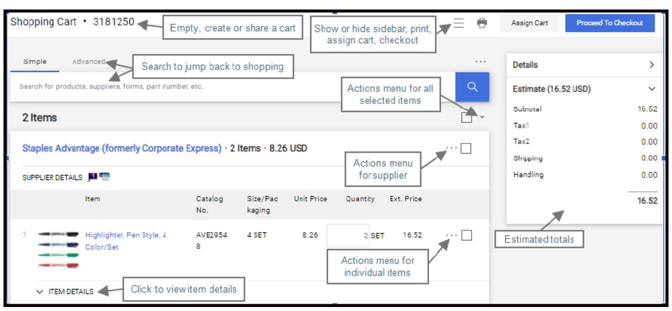
Log in to myBGSU. Click on the Employees tab > Purchasing. Click on the BGSU Falcons Purch logo.





View Cart

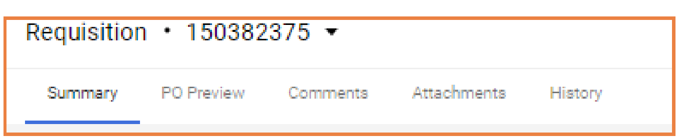
The shopping cart contains items a user has selected to purchase. Users can add or remove items, change commodity codes, adjust quantities, and view an estimated total purchase amount.



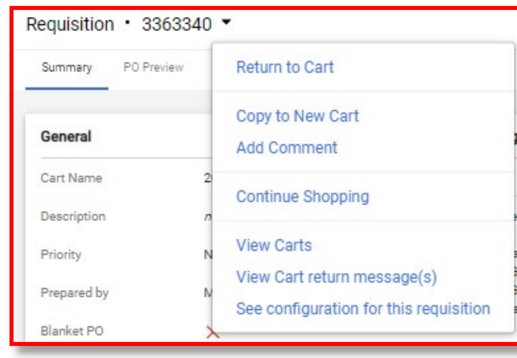
Proceed to Checkout

The checkout action creates the purchase requisition. The purchase requisition allows someone with the requester role to add chart fields, comments, attachments, make edits and place the order.

Tabs at the top of the page contain additional information about the document including comments.



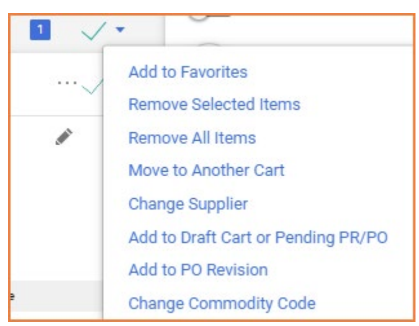
Document actions are available in the top left corner of the page. Click the drop-down menu next to the requisition number to see a list of actions that can be taken for the document.



Other actions are available in the top right corner of the page:

- Show or hide the right sidebar.
- Select an option from the Filter View drop-down menu to view individual sections on the page. For example, view header details only, view line items only, or view billing details only.

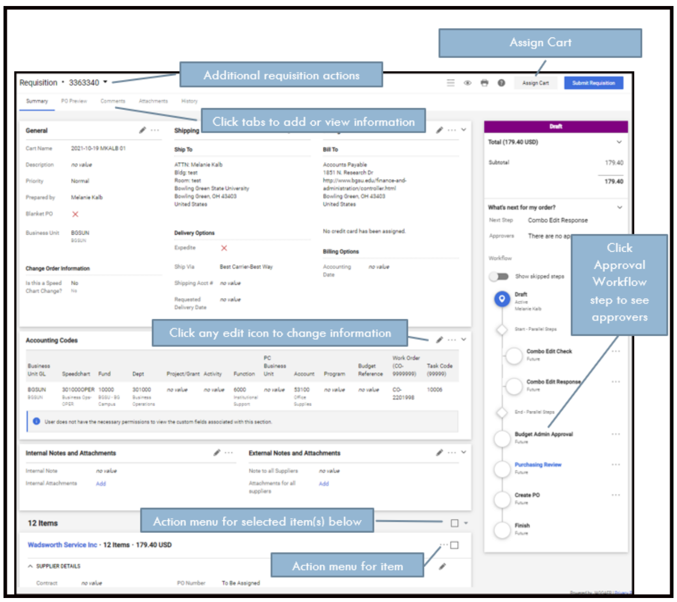
In the Items section, the actions menu for all selected items is the drop-down menu at the top right corner of the section .



On individual items, click the action icon to see actions that can be applied to that item only.

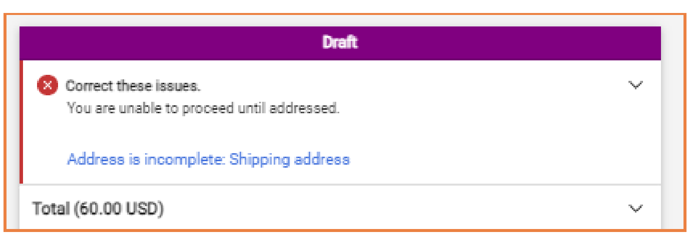
Click the edit icon to edit information within the line. Click the edit icon to modify information in a section.

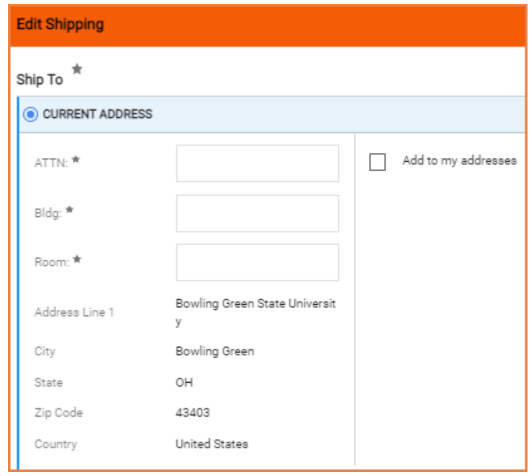
The right sidebar shows document totals and workflow. Users can view approval workflow information by selecting the link for the approval step.



Review Requisition

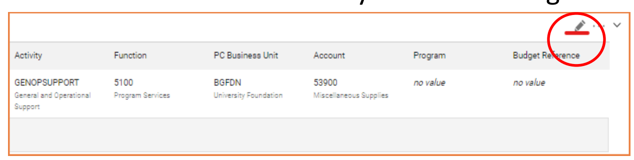
Review the requisition before submitting. A red X means required information is missing. Click on the error message hyperlink to complete the missing information.



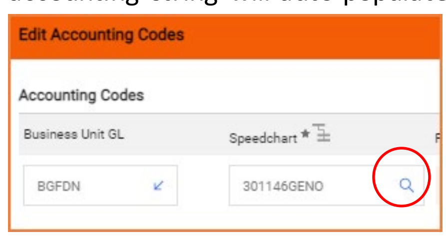


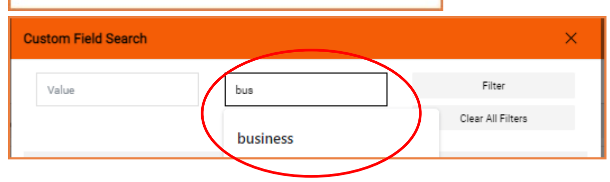
Edit Budget Accounts

Select the edit icon to modify the accounting codes.

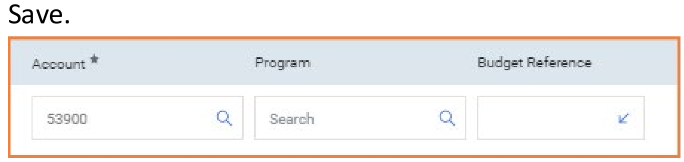


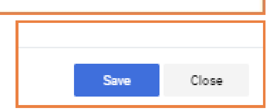
Search or select a favorite for each accounting codes segment from left to right. Once you select a Business Unit GL then a Speedchart, the rest of the accounting string will auto populate.



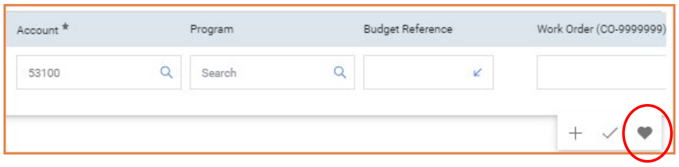


Scroll all the way to the right to enter an Account and Program Code (program code is optional). Select Save.



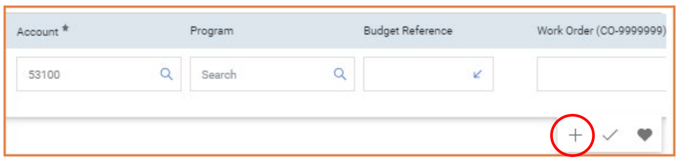


Select the heart icon to add a favorite account string.

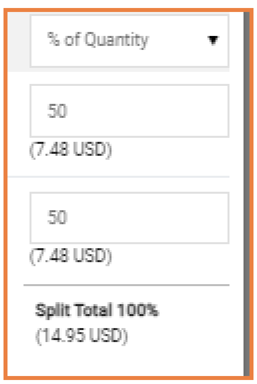


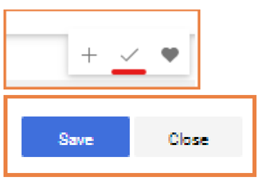
Split Between Multiple Budgets

To add additional accounting codes, select the edit icon and select the + icon.



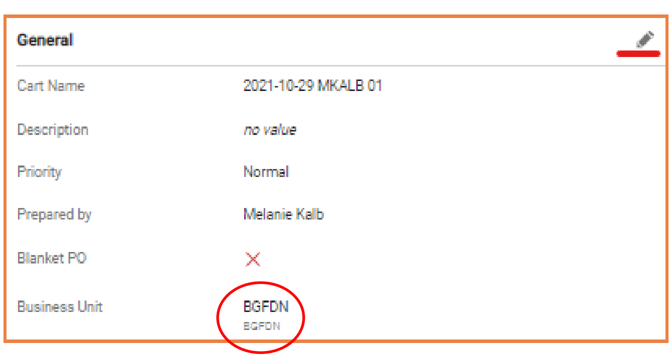
Add the split by percentage and edit the accounts. Click the validate check mark, and then select save.

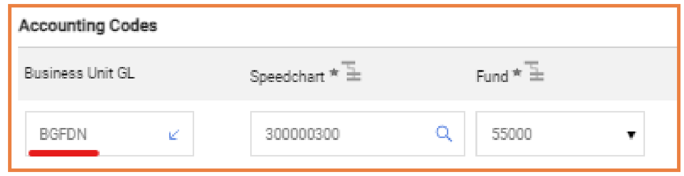




Foundation Accounts

Foundation accounts require the Business Unit BGFDN. BGFDN must be entered in the General section of the requisition AND in accounting codes.



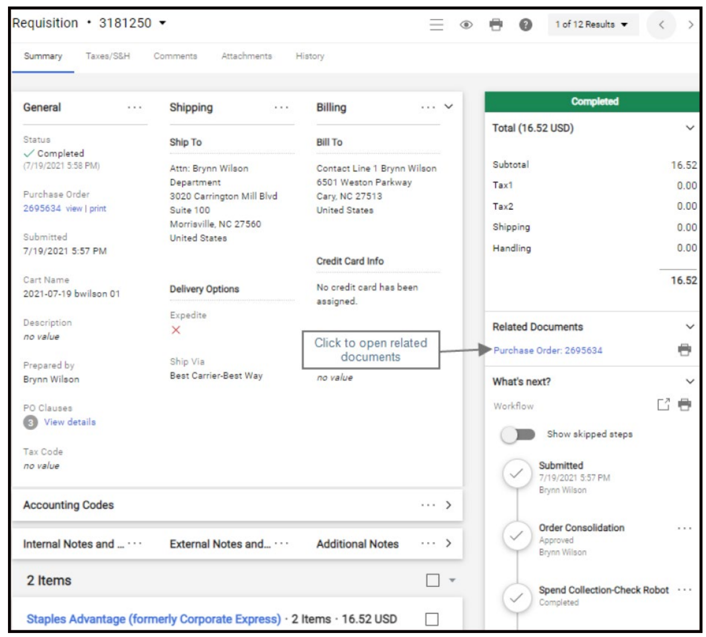


Submit Requisition

Select one of the action buttons to go to the next step.

Submitted Requisitions

Submitted Requisitions are displayed in a document configuration that is like the Checkout page.

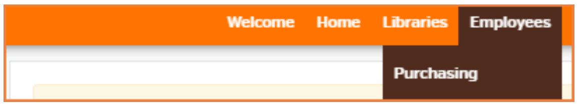


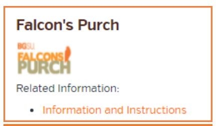
Icons

- Click to display actions for items in a panel or page
- Click to edit information
- Collapse section
- or Expand section
- Click to add an item to Favorites
- Item is a user's personal Favorite

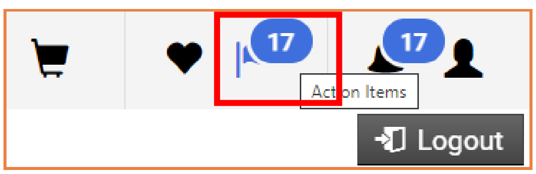
Requisition Approval

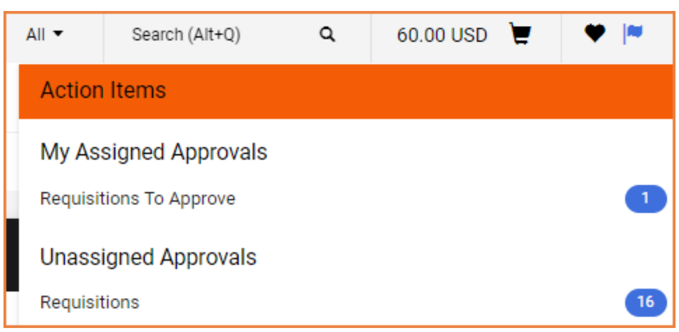
Log in to myBGSU. Click on the Employees tab > Purchasing. Click on the BGSU Falcons Purch logo





To view the requisitions that are in your queue for approval. Select the Action Items flag in the upper right corner. Select "Requisitions" for all requisitions waiting on your approval or "Requisitions to Approve" for requisitions you have assigned to yourself while waiting on more information.





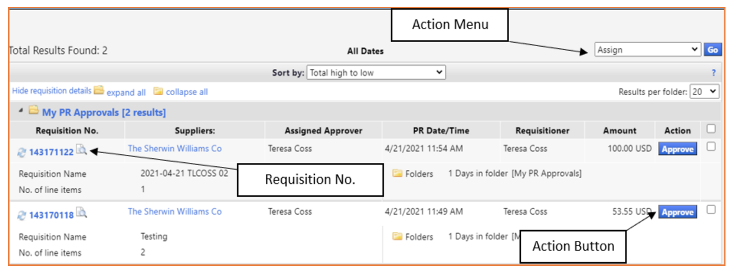
Available Actions

There are several actions you can take directly from the **My Approvals** screen:

The Action Button - A document may have an active button in the **Action** column. Generally, if the document is in your personal approvals folder, the button will default to Approve. You can click the button to approve the document. If the document is in another folder, but is eligible to be assigned to you, the button will default to Assign. You can click the button to assign the document to yourself for approval.

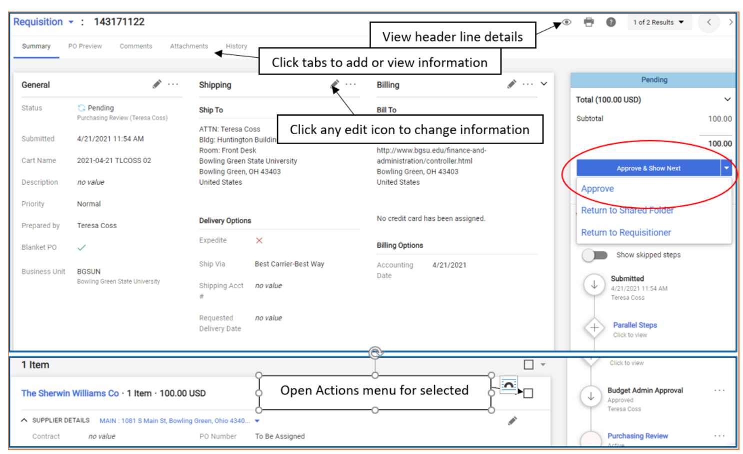
The Action Menu - The action menu allows you to perform an action on one or more documents. Available options include Assign, Approve, Forward and more.

Click the **Requisition No.** to open and view the document.



Requisition Overview

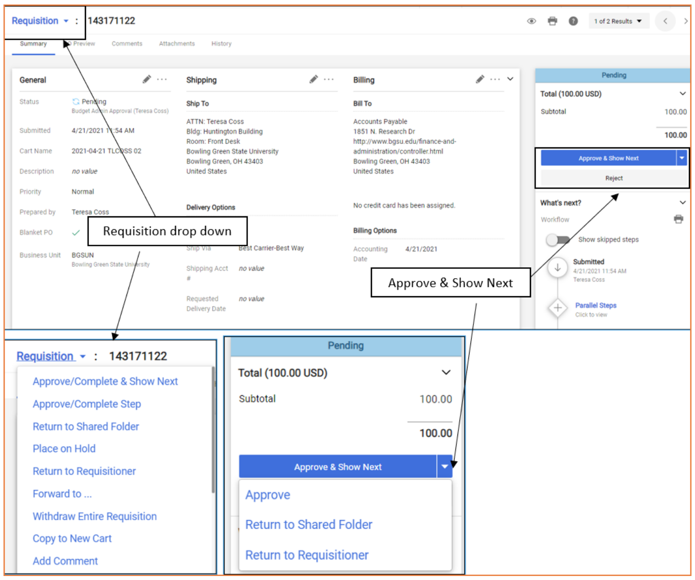
Review the information and make updates if needed.



Approve & Show Next

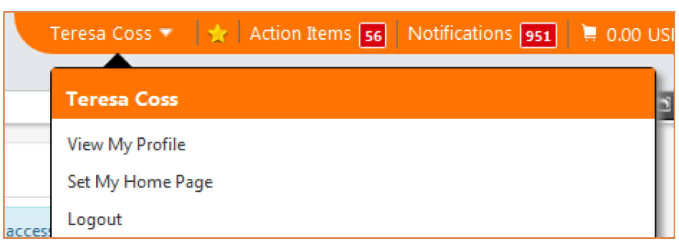
Select to approve the document and move to the next document in your approvals folder. **Note:** If you have multiple documents to approve, the Approve & Show Next button is displayed by default. If you want to approve the open document only, click the drop down icon next to the button and select **Approve**.

To view more options you can click on the dropdown to the right of **Requisition** or the dropdown for the **Approve & Show Next** Button.

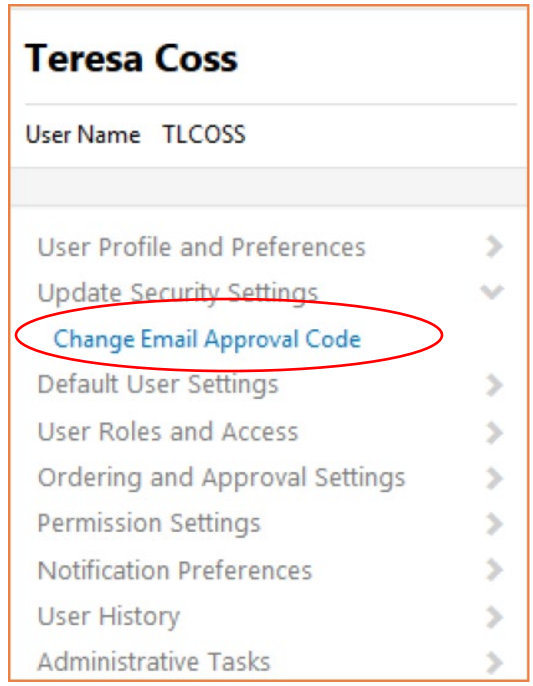


Email Approval

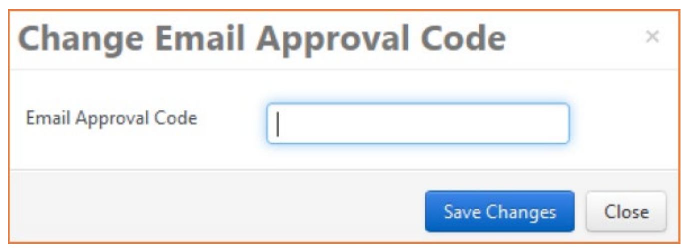
To enable the ability to approve requisitions via email, click on your name in the upper right corner, select View My Profile.



On the left navigation select Update Security Settings > click on Change Email Approval Code.



Enter an email approval code. The code may be a combination of characters, numbers and letters and with a minimum length of 6 characters.



When you have a requisition to approve you will receive an email as shown below. Click on the Take Action button at the bottom of the email.

New Pending Approval for Requisition# 27591309

falconspurch@bgsu.edu
Sent: Wed 2/8/2012 11:00 AM
To: Maureen Ireland

Approval Request for Requisition# 27591309

Dear Maureen Ireland,

The requisition listed below has been submitted for your approval.

Summary

Folder:	Purchasing Review
Prepared by:	Linda Szych
Cart Name:	2012-02-08 LSZYCH 02
Requisition No.:	27591309
Priority:	Normal
No. of line items:	1
TOTAL:	**409.95 USD**

Details

School Outfitters LLC

Item 1 (Non Catalog Item)

Description:	Graphics Magnetic Whiteboard-Music Staff Lines-Aluminum Frame 4'Hx 8'W
Catalog Number:	MAR-PR-408-MS
Quantity:	1
Unit Price:	409.95 USD
Ext. Price:	409.95 USD
Size/Packaging:	1/EA
Commodity Code:	10000000
TOTAL:	**409.95 USD**

Accounting Codes

Business Unit GL:	BGSUN - BGSUN
Speedchart:	117000CRSE - Musical Arts Dean-CRSE
Fund:	13000 - Course Fees - BG Campus
Dept:	117000 - Musical Arts Dean
Project/Grant:	
Activity:	
Function:	4000 - Academic Support
PC Business Unit:	
Account:	53100 - Office Supplies*
Program:	9010 - Departmental Program #9010
Budget Reference:	

Ready to approve, reject or assign this document to yourself? Take Action

You will then proceed to enter your Approval Code and either Approve or Assign to myself to return the requisition back to the requestor.

Actions

Approval Code *

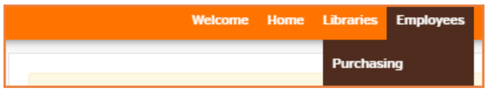
Comment

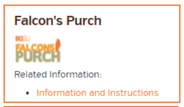
Assign to myself

Approve

Receiving

Log in to myBGSU. Click on the Employees tab > Purchasing. Click on the BGSU Falcons Purch logo.

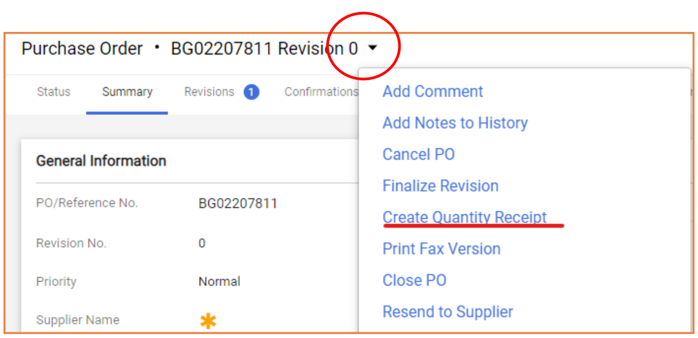




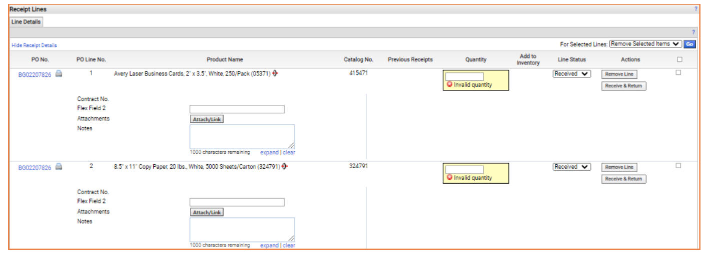
Creating Receipts

Receipts are required for all purchase orders (PO) that are greater than $999. You should not enter a receipt until after the goods/services have been received. You will receive a weekly notification to enter a receipt, please disregard the notice until all goods/services have been received. Multiple receipts can be entered. For example, if you receive part of the order, you can receive for those items.

Creating a Quantity Receipt – used when the Unit of Measure is not USD. Open the PO. Select Create Quantity Receipt from the drop down menu.



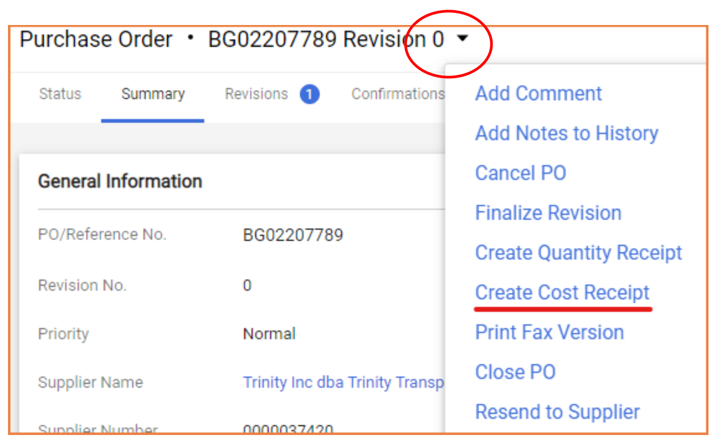
Scroll down to the Receipt Lines. If you are only receiving against one PO line, you must first delete the lines you WILL NOT be receiving against. To delete a line click on Remove Line.



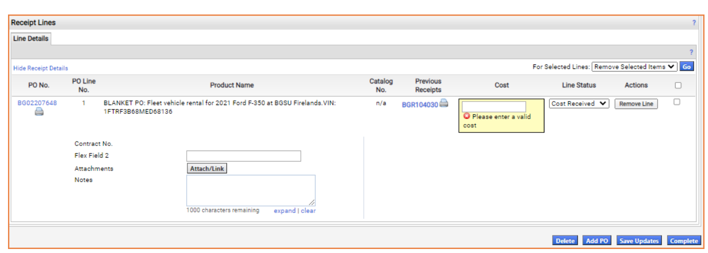
Enter the amount of items you have received for each line. Click on Save Update and then click Complete.

Creating a Cost Receipt – is used when the UOM is USD.

Open the PO. Select Create Cost Receipt from the drop down menu.

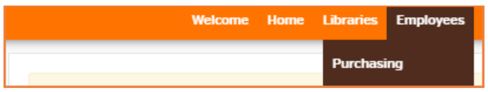


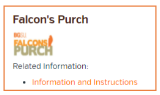
Scroll down to Receipt Lines. Enter the dollar amount of the items that have been received. Click on Save Updates and then Complete.



Search and Export

Log in to myBGSU. Click on the Employees tab > Purchasing. Click on the BGSU Falcons Purch logo.

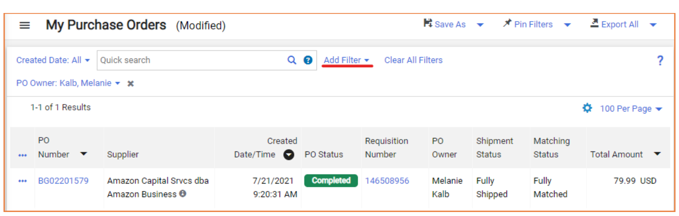


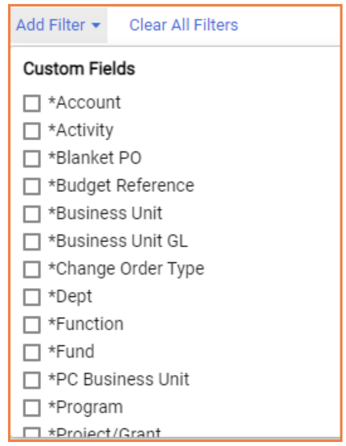


Searching for Documents

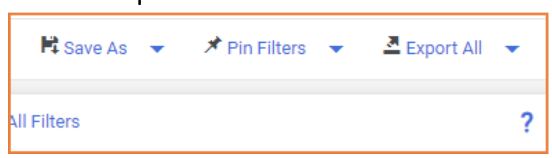
Hover over the Documents icon and hover over Search. Select the documents you would like to search for. My Orders/Purchase Orders will take you to purchase orders created by you.

Select filters to narrow the search criteria.

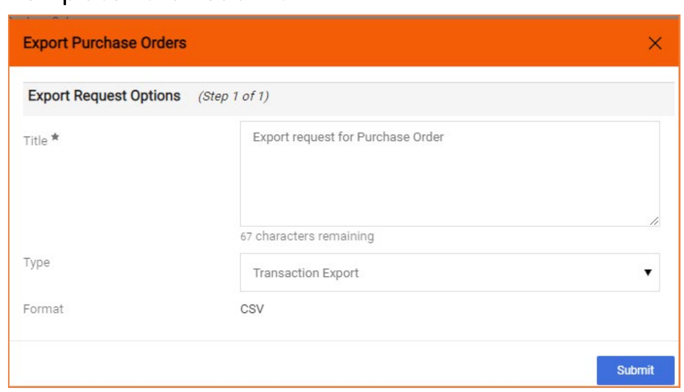




If you would like a spreadsheet of the search results, click on Export All.

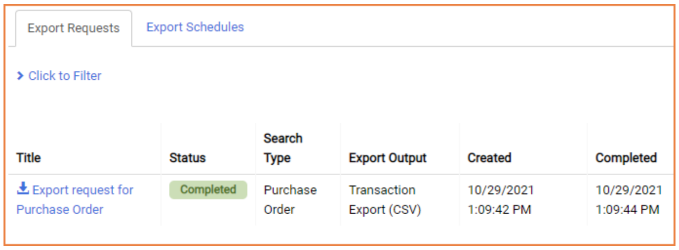


Enter a File name and select the Request Export Template. Click Submit.



A pop-up box will appear. Click on Manage Search Exports.

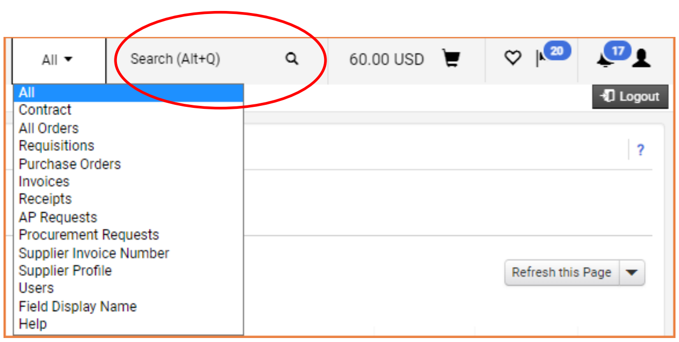
Click on the File Name when the Export Status is Completed.

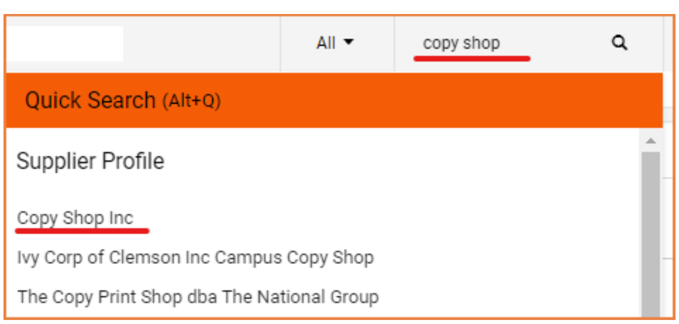


Quick Search

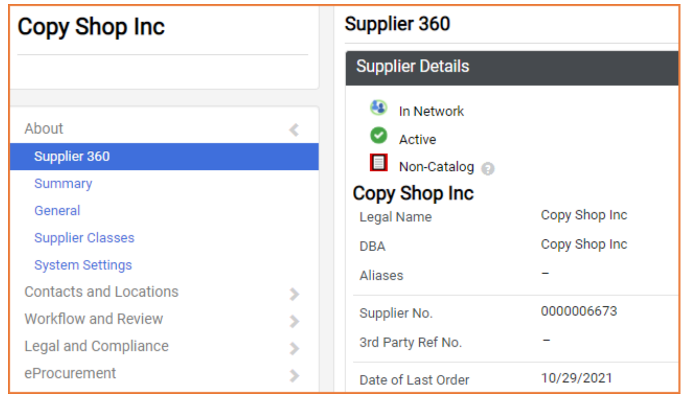
The quick search feature in the upper right hand portion of the screen is an effective way to quickly search for purchase orders, requisitions, receipts, invoices, suppliers, etc….

For example – an effective way of investigating to see if a supplier is set up in the system for a requisition to be sent them (see below). When you type in the supplier name it will give you the supplier profile section. You can leave the search set to All as seen below, or select Supplier Profile and click the magnifying glass.





You can then view their profile to see if they are active.



Icons

- Click to display actions for items in a panel or page
- Click to edit information
- Collapse section
- or Expand section
- Click to add an item to Favorites
- Item is a user's personal Favorite