SCIQUEST (JAGGAER)

Presented by Purchasing Services
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Purchasing Agent
Introductions

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Purchasing Process
Purchasing Process

- Requisition is created by the department to fill a need
- Purchasing facilitates the bid and purchasing process
- Vendor is awarded
- Vendor performs work or delivers product
- Vendor submits invoice with payment terms
- Vendor receives payment
Purchase Requisition (RQ)

All requisitions over $1,000 are reviewed by a buyer

• Most Requisitions are sent out to bid.
• Minority, Women and Veteran Businesses are included
• If sent out to Sourcing, a Purchase Order will not be sent until after bidding is completed and a vendor is chosen

When Requisitions are completed, SciQuest will assign a PO# and send the document to vendor.
Minority, Women and Veteran Owned Enterprises

• Acronyms
  • Minority Owned Business Enterprise – MBE
  • Woman Owned Business Enterprise – WBE
  • Veteran Owned Business Enterprise – VBE
  • Indiana Veteran Owned Small Business – IVOSB
  • Indiana Department of Administration – IDOA

On SciQuest Homepage

Diversity Vendors

*Diversity Spending Training Video*
Please Click Here to Watch

Ball State University supports the promotion of diversity with vendors who supply goods and services. Purchasing Services is happy to provide the links below to help the campus community utilize Minority, Woman or Veteran-owned Business Enterprises (MWBE/V) for their purchases. Purchasing Services encourages you to visit the state of Indiana’s certified vendor list to determine if a MWBE/V vendor may suit your needs. We thank you for your cooperation in this effort. Please visit the Purchasing Services website for more information.

Click on the link below to be directed to the Indiana Department of Administration’s (IDOA) certified list.

- Current list of Indiana Certified Minority, Women and Veteran Owned Businesses
FAQ Purchase Requisition (RQ)

I submitted a Requisition and it's incorrect, how do I change?

- If you placed the requisition you can withdraw it, as long as it has not created a Purchase Order yet.
- If you cannot withdraw, or it has already become a PO, call Purchasing Services; a Change Order may be necessary.
FAQ Purchase Requisition (RQ)

• What if my Requisition is rejected?
  • Requisitions can be auto rejected or rejected by an approver
  • Auto reject typically means there is a problem with the FOAPAL or security rights

• Approver Rejects or Return
  • Returned - Usually due to incorrect or missing information; will return to your cart so you can make changes and submit again without starting over
  • Rejected - Requisition no longer exists, must copy or start over
Purchase Order (PO)

- Offer to Purchase by the University. Legal commitment by the Vendor to supply the University with a good or service.
- All Purchase Orders are issued with terms and conditions containing information pertaining the University’s tax exempt status.
- PO Created when all Requisition approvals are met
- SciQuest automatically faxes or emails the PO to the Vendor
- Receiving info is entered into SciQuest by the department user on orders above $5,000 dollars
  - This has to happen before the vendor can be paid
- Change Orders are initiated by the Purchasing Agent when conditions in the original PO change
  - Change in quantity, price, removing a line item, etc...
- Note: It is against University policy for anyone to encumber the University without the appropriate request to purchase and approved PO established.
FAQ Purchase Order (PO)

How do I get a Purchase Order (PO) Paid?

- All purchase orders with a total amount over $5,000 require receiving; Please enter receiving for these orders as your items arrive
  - Cost Receipt
  - Quantity Receipt

- All purchase orders less than $5,000 will be paid once the invoice is received

- The Accounting Office does not receive a notification if an invoice is attached to a catalog or non-catalog order in SciQuest. If you choose to attach an invoice to a catalog or non-catalog order, please notify the Accounting Office so that your invoice may be processed.
FAQ Purchase Order (PO)

How do I enter in Receiving?

- Find the Purchase Order that needs to have a receipt
- From the dropdown menu (top left of screen) click: “Create Quantity/Cost Receipt”
- Click on Go
FAQ Purchase Order (PO)

How do I cancel a Purchase Order?
- Purchase Orders can only be canceled by Purchasing Services. This can be done multiple ways:
  - Comment on the Purchase Order to procurement@bsu.edu
  - Call (765) 285.1532, or email directly to procurement@bsu.edu

How do I add money or change amount on a Purchase Order?
- Comment on the Purchase Order to the appropriate buyer or to procurement@bsu.edu with details of what needs to be changed.
Standing Order

- Provides a procurement method for a repetitively purchased, lower value good or service during a specified time (typically the University’s fiscal year)
- Standing Orders should only be used when a department anticipates spending more than 1,000 dollars and intends to do one of the following:
  - Execute at least 24 transactions for a particular supply or service
  - Pay for a monthly subscription service greater than 12 months
  - Standing Orders may not be used to purchase capital equipment.
FAQ Standing Order

How do I create a Standing Order in SciQuest?

- Complete Non-Catalog item in SciQuest
- Should include the word “Standing” in your description
- You Place a check mark for a Standing Order on your Requisition
FAQ Standing Order

How do I get payment applied to a Standing Order?

- Accounting must have invoice with PO# for Standing Order
- The Accounting Office does not receive a notification if an invoice is attached to a catalog or non-catalog order in SciQuest. If you choose to attach an invoice to a catalog or non-catalog order, please notify the Accounting Office so that your invoice may be processed
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Sole Source form
Orders up to $1,000
- No bids are required

PO’s $1,000 - $14,999
- Competitive bids are often issued.

PO’s greater than $15,000
- Competitive bids are required.
- Sole Source Justification Form Required if a single vendor is desired (no competitive bidding)
FAQ Sole Source Form

When do I need a Sole Source Form?

- When making a purchase that is impacted because only one source is available, or is needed due to specific technical or research related requirements that require a specific vendor.

- There are restrictions on the use of this means of procurement and documentation must show sufficient justification for using a single source acquisition.
  - Applies to anything $15,000 or more.
Reasons for Requesting a Sole Source Purchase

- Only known product or equipment which meets the need.
- Services require this supplier’s special expertise
- Components must be the same brand/manufacturer as what’s in current equipment
- Services or equipment is needed for research continuity or university compliance
- Equipment required must be compatible with current equipment to realize efficiencies
- This particular equipment is specifically required as part of a grant
- Item selected is from a state commodity contract
- There is substantial technical risk in using another supplier
- Other (Utilized in conjunction with comment section).
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Non Po Payment vs Non-Catalog
Non-Catalog

- Non-Catalog should be used for quotes, goods and services not found on the Showcase.
- Once the requisition is approved, it will send the supplier the Purchase Order for fulfillment.
- Receiving info is entered into SciQuest by the department user on orders above $5,000.00 dollars, and $2,500 for standing orders.

Non PO Payment Request Form

- Used for a Direct Pay or an After the Fact.
- Should only be used for payment when the vendor does not accept a PO or specific direct pay scenarios.
- Non PO Payments do not require receiving because they are paid with invoice attached on form.
FAQ Non-PO Payment
When do I use a Direct Pay?

Reasons for Direct Pay:
- Athletic Official Payments
- Bank Bond Payments
- BSU Foundation Payments (payments from BSU to BSU Foundation)
- Candidate Travel Reimbursement
- Employee Awards
- BSU Foundation to reimburse BSU
- Food Purchases or Food Reimbursements (Original itemized receipt required).

- New Employee Move Reimbursement
- Speakers/Performers/Consultants (if payment to an Individual & less than $5000.00)
- Revolving fund activity (change fund)
- Student Athlete Official Visits
- Student Athlete Unofficial Visits
- Student Awards
- Student Supervisors
- US Dept of Homeland Security payments
FAQ Non-PO Payment

When do I use an After the Fact?

- Reimbursements
- Paying individuals for services performed.
- When you have an invoice for products/services previously ordered

The list of options includes:
- Athletic Official Payments
- Bank Bond Payments
- BSU Foundation Payments (payments from BSU to BSU Foundation)
- Candidate Travel Reimb
- Employee Moving Expense Reimbursement
- Employee Awards (reimb for employee awards purchased-BSU Foundation to reimb BSU)
- Food Purchases or Food Reimbursements (Original itemized receipt required)
- Speakers/Performers/Consultants (if payment to an Individual & less than $5000.00)
- Refunds from Revenue Accounts
- Research Participant Incentive Payment
- Revolving fund activity (change fund)
- Student Athlete Official Visits
- Student Athlete Unofficial Visits
- Student Awards/Scholarships
- Student Supervisors
- US Dept of Homeland Security payments
- Other Direct Pay (if no invoice provided)
- N/A - After-the-Fact
FAQ Non-PO Payment

Common reason why you can’t add to cart?

How to Fix These Common Errors

Error:

- Yellow Boxes can show required items not completed on form

Fixing the error:

- Make sure you have NO YELLOW boxes
- Make sure your CART is empty, before you begin
- If you are still having trouble, call Purchasing Services for assistance.
- Login to SciQuest
- Select the “Non PO Payment Request Form” (Located under Showcased services)
- When completing the form any field that is BOLD is a required field
- Click Go

(Add and go to cart)
You can access the Non-Catalog entry form from various points on the Storefront and the shopping cart.

Non-Catalog items include products from vendors who do not maintain hosted catalogs within the purchasing system or for purchases goods or services from companies who are awarded bids for unique products or specialized services.

To order a non-catalog item, you will need to enter a product description, catalog number, price, manufacturer name, and part number for the product being ordered, or a detailed description, supplier, and price for the service. The more information you can provide on the order form it will reduce the potential risk for ordering the wrong product.
NON-CATALOG PAYMENT
ADDING NON-CATALOG ITEMS TO A SHOPPING CART

1. CLICK ON the NON-CATALOG link from the home/shop screen.

2. ENTER or SEARCH FOR the supplier’s name.
   - If you cannot find a match, you will need to complete the New Supplier Request form before proceeding.
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Supplier Request Form
### Supplier Request Form

#### When do I need to complete a Supplier Request Form?

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reimbursement/Refund</td>
<td>• Non PO Payment</td>
</tr>
<tr>
<td>Stipend</td>
<td>• A form of salary, such as for an internship or apprenticeship</td>
</tr>
<tr>
<td>Goods/Services</td>
<td>• A tangible product or a service that is being requested with a purchase order</td>
</tr>
<tr>
<td>Update Address</td>
<td>• See address but not the one you need</td>
</tr>
<tr>
<td>Update Phone/Fax</td>
<td>• May or may not exist, but need it changed or added</td>
</tr>
<tr>
<td>Update Email</td>
<td>• May or may not exist Email but need it changed or added</td>
</tr>
</tbody>
</table>
Supplier Request Form - start here

Where do I find Supplier Request Form?

Supplier Request Form

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**Supplier Request**

<table>
<thead>
<tr>
<th>Form Number</th>
<th>Purpose</th>
<th>Status</th>
<th>Generic Request Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td></td>
<td></td>
<td>Complete</td>
</tr>
</tbody>
</table>

**Instructions**

- Please provide the information for this new supplier request in the given fields. Bold fields are required. Please call 765-285-1532 if you have questions or issues with this form.
- If your request is urgent please contact Purchasing Services.
- Attach W9s, and other supporting documentation, in the "Attachments Section" listed in the NEXT SECTION of this form.

Additional Information:

- Please make sure that you attach the appropriate information for your supplier below.
- If you are requesting a BSU affiliate to be added to pay for reimbursement OR selecting a Reimbursement/Fund, a W-9 is not required.
- If this is a company that is being added so you can purchase goods, please make sure you include how this supplier should receive their purchase order.

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**Purchasing Services Request Forms**

- **Supplier Request**
  - Add or Update Supplier

- **Sole Source Request**
  - Non-competitive purchases

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**Payment Request Forms**

- **Wire Request Form**
  - Send payment via Wire Transfer

- **Non PO Payment Request Form**
  - Direct Pay or After the Fact
How do I complete a Supplier Request Form?

- Request Form Items displayed vertically
- Navigation
  - Click on each section that needs complete
  - Click on “Next” button
RECOMENDATION!

- Name Request form with Name of Supplier
  - This will allow you to search by Supplier Name or View by name when searching for Request Forms
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Commodity Code Vs Account Codes
Commodity Codes

- Used for routing purposes. Directs requisition to the proper Buyer. Improper routing can result in a delay of the requisition’s approval.

**BSU Specific Commodity Codes**

- Facility or Equipment Rental
- Equipment and Maintenance Repair Services
- Food Reimbursement
- Conference Registration and Reimbursement
- BSU Affiliate Reimbursements
Commodity Codes
Searching for Commodity Code
Account Codes

What Account Codes should I use?

- **733210-Minor Equipment** – for non-computer equipment valued at less than $5,000 per item
- **734025-Computer Purchases** – for computers valued at less than $5,000 per item
- **734020-Computer Software Purchased** – for software valued at less than $100,000 per license
- **739010-739150** - Account Codes in this range are typically used with plant funds (9xxxxx range).

If you are not responsible for entering a PR against a plant fund, please do not use Account Codes in the 739xxx range.
SciQuest Home Page

Internal Catalogs (Ball State University)
- Central Stores Catalog
- Excess Catalog
- Technology Store

Showcased Suppliers
- Frequent Suppliers that Ball State has negotiated pricing
- Each Supplier has a catalog
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Equipment Request - B24
Purchasing services provides numerous services to departments on campus. Including loaning out items such as:

- Tables (6 foot, 8 foot, Cocktail, Handicap and Round)
- Chairs (Metal, Plastic)
- Risers (12”, 24”)
- Steps (“24”)
- Podiums (Free Standing, Table Top)
- Coatracks
Equipment Request - B24

To Complete an Equipment Request–B24

1. Login to SciQuest
2. Look for “Showcased Services”
3. Click on “Equipment Request-B24”
4. Complete Form
5. Add and go to cart
6. Proceed or Assign Cart
Equipment Request-B24

Must complete all required fields

<table>
<thead>
<tr>
<th>Building Code/Room #</th>
<th>Preferred Pick up Time</th>
<th>Event Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Need Delivered</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time of Day Needed</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If Urgent let us know, If there is B450 related to same event please note here. Preferred date is only a preference, If time sensitive please include information about certain date.
Equipment Request - B24

Tips to Complete Form
- Must complete all required fields
- Include as much information as possible in regard to timing of your event
- SUBMIT the form do not ASSIGN
  (If can’t submit assign to person in your department to submit)
- DO NOT mix with other suppliers
- Do not use Equipment Account Codes on B24
Move Request - B450

When do I use B450?

- **Excess**: To remove item from departmentally permanently
- **Inter-Department**: Move item room to room in same department
- **Loaned**: Temporary use between departments
- **Lost or Stolen**: If equipment is lost or stolen
- **Traded**: Purchased item and trading in old item
- **Transferred**: Item moved permanently to different department
Move Request - B450

What you need to complete a B450
Move Request - B450

What you need to complete a B450

Use this form to notify Purchasing Services of equipment moves needing to be scheduled. Form may also be used for scheduling pickup of recycled items. If you have questions, please contact Purchasing Services at 765-285-1803 or email purchasing@bsu.edu.

1. Review items carefully for inventory numbers and serial numbers.
2. List items individually.
To Complete a Move Request-B450
1. Login to SciQuest
2. Look for “Showcased Services”
3. Click on “Move Request-B450”
4. Complete Form
5. Add and go to cart
6. Proceed or Assign Cart
Move Request - B450

If move is also tied with B24, mention here
If Time sensitive, let us know here
Any information about item, especially if large item
If no Room#, explain where

<table>
<thead>
<tr>
<th>BSU Inventory Number</th>
<th>Item Description</th>
<th>Serial Number if known</th>
<th>Building Code/Room #</th>
<th>Building Code/Room #</th>
<th>Org Code # of New Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Move Request - B450

## How NOT to Complete B450

**Borrowed Items** should only be on B24.

**What Muncie Residence?**

"Do Not Use Miscellaneous Item as Description"
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Courier Request Form
When can I use a Courier Request form?

- Courier Request forms should be used for time sensitive information
- Approved Courier Request Items
  - Campus Envelopes
  - Fed EX Packages
  - UPS Packages
  - DHL Packages
How do complete a Courier Request form?
Courier Request Form

How to complete a Courier Request form?

- **Must Include Required Contact Information**
  - Contact Name
  - Phone Number
  - Submit Date
  - Preferred Data of Pickup

- **Courier Item Requested**
  - Find Correct Item type
  - Enter both “From” and “To” locations
  - Should include:
    - BUILDING CODE/ROOM NUMBER
    - eg. HP374, AL250

**COURIER REQUEST FORM CUT OFF IS 3:30PM**

(This means if submitted after 3:30PM, it will completed next day)
Wire Request Form

When to submit a Wire Request Form

- Wire Request form is used to remit payment through a wire transfer.
- Make sure your cart is empty before you begin
- Complete all Required Fields
- Double check all Bank Numbers before submitting
SCIQUEST REFRESHER

SciQuest Navigation Demonstration
References

**Purchasing Website**
- Click on SciQuest
  - Additional links
  - Policies and Procedures
  - FAQ’s

**Banner Help and Resource Center for Employees**
- Argos Documentation
- Super Admins
- Student Module
- Finance Module HR Module
- Human Resource Module
- R25-Classrooms Search
- Student Module

**SciQuest Home Page**
- Notifications/Updates
- SciQuest Training Material
- FOAPAL Information Updates
- Accounting Updates/Training Material

**Office of Accounting Website**
- Lost Checks
- Payment Submission Flow Chart
- Invoicing Notes
- Accounting Forms
- Travel Information
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