Jenzabar One (J1)

Purchasing Handbook

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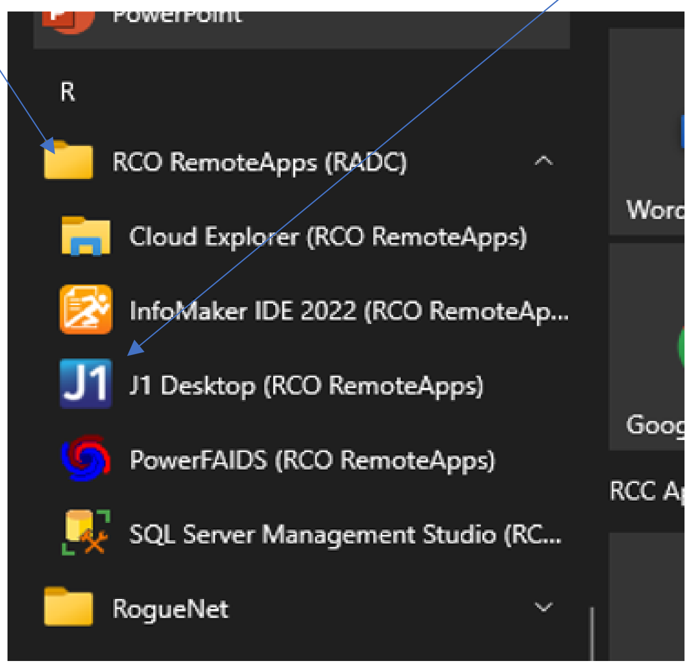
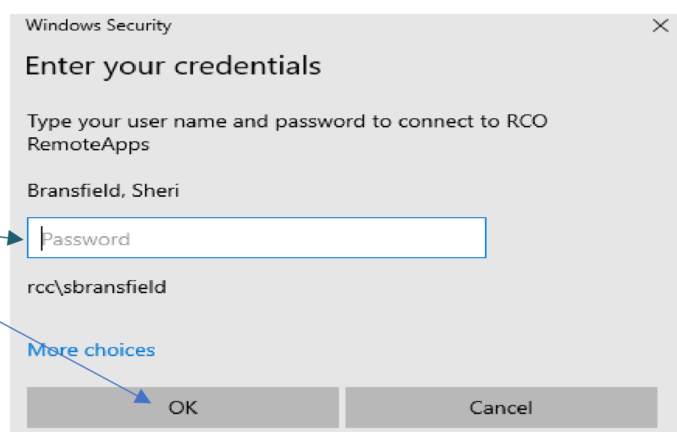
How to Access Jenzabar One

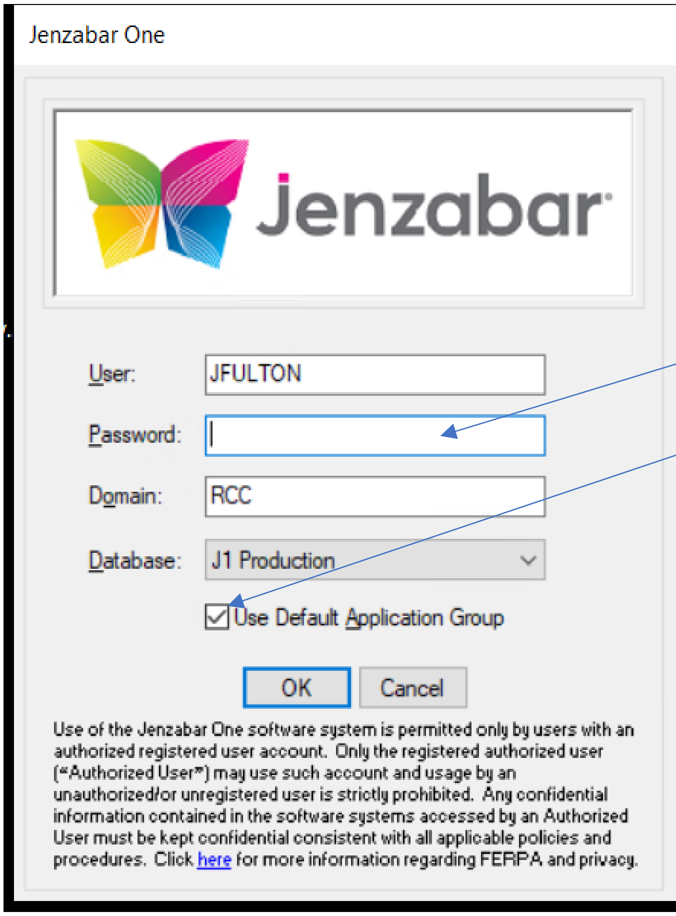
To access Jenzabar One (J1), locate the remote access in the Start menu on the desktop. Click the Windows icon on the lower left corner of the screen and scroll to RCO RemoteApps (RADC) and click the drop down to expand the file. Select J1 Desktop.



If the RCO RemoteApps (RADC) is not located in the windows menu contact IT at ithelpme@roguecc.edu to create a ticket. Someone from IT will assist with getting this loaded on the computer. Remote users will be required to follow directions as listed in the following link: J1 Desktop Setup in Remote 6.pdf

Enter your RCC Username and Password, click OK.

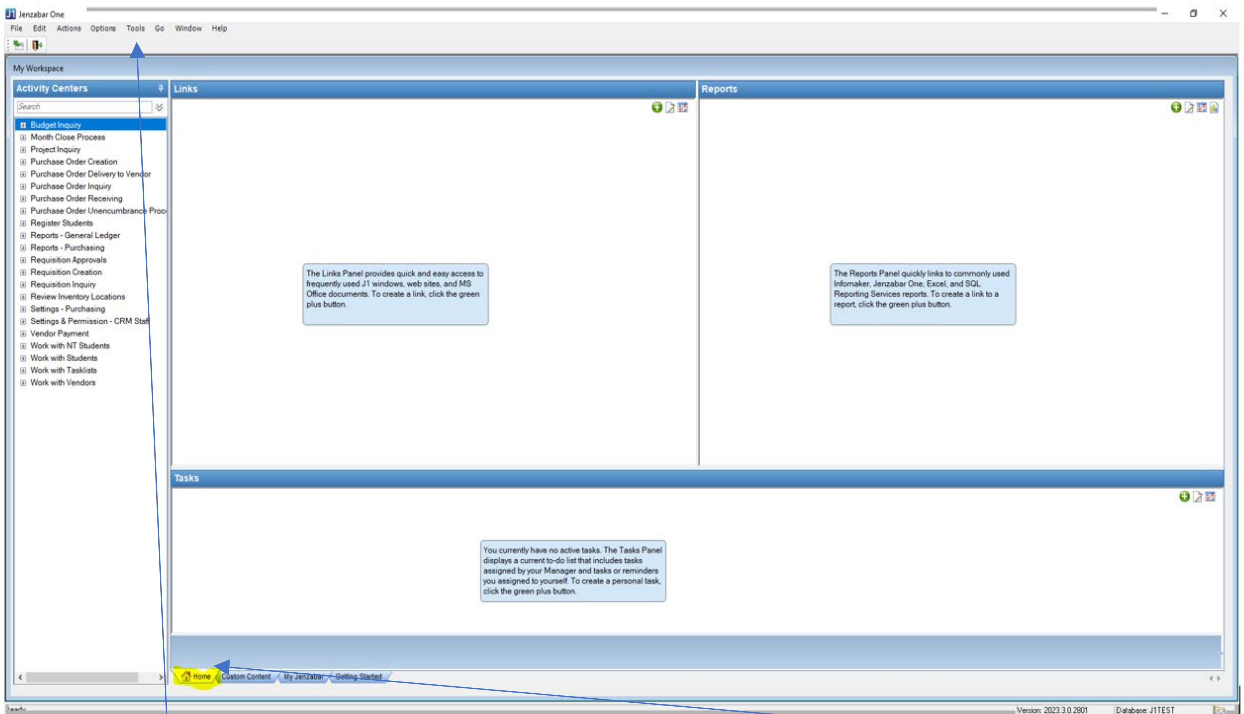




Enter your RCC password and uncheck the Use Default Application Group box before selecting OK

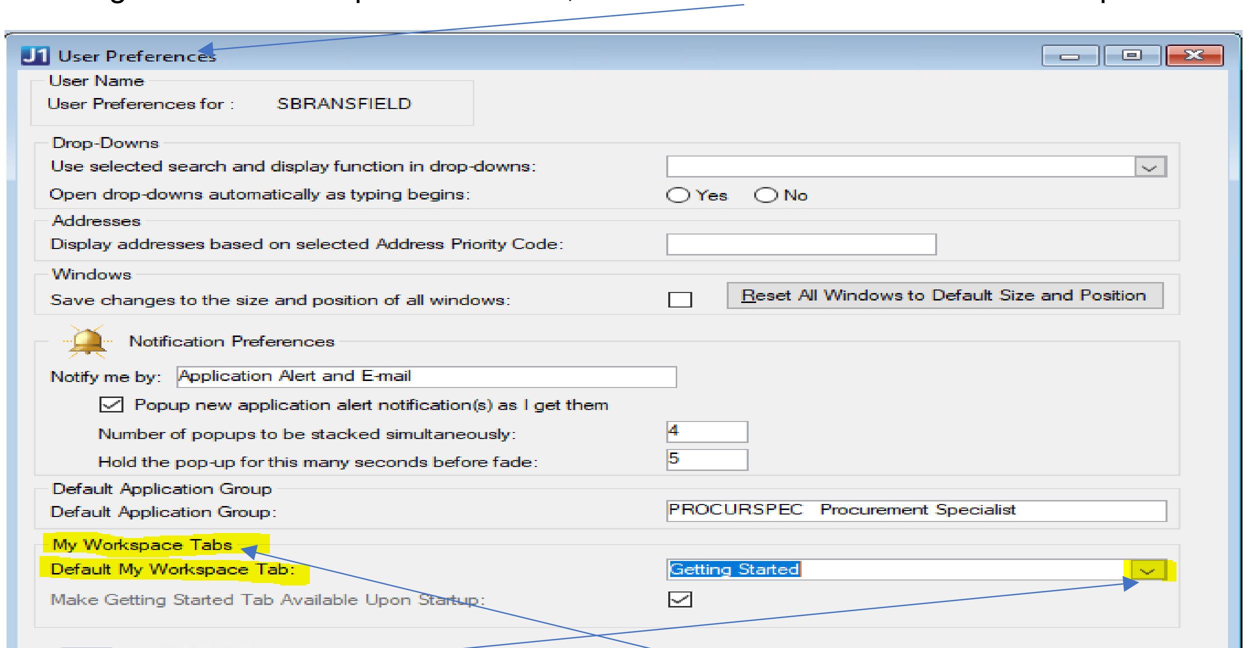
Once OK is selected this will open the J1 Desktop.

Customizing the J1 Desktop Workspace



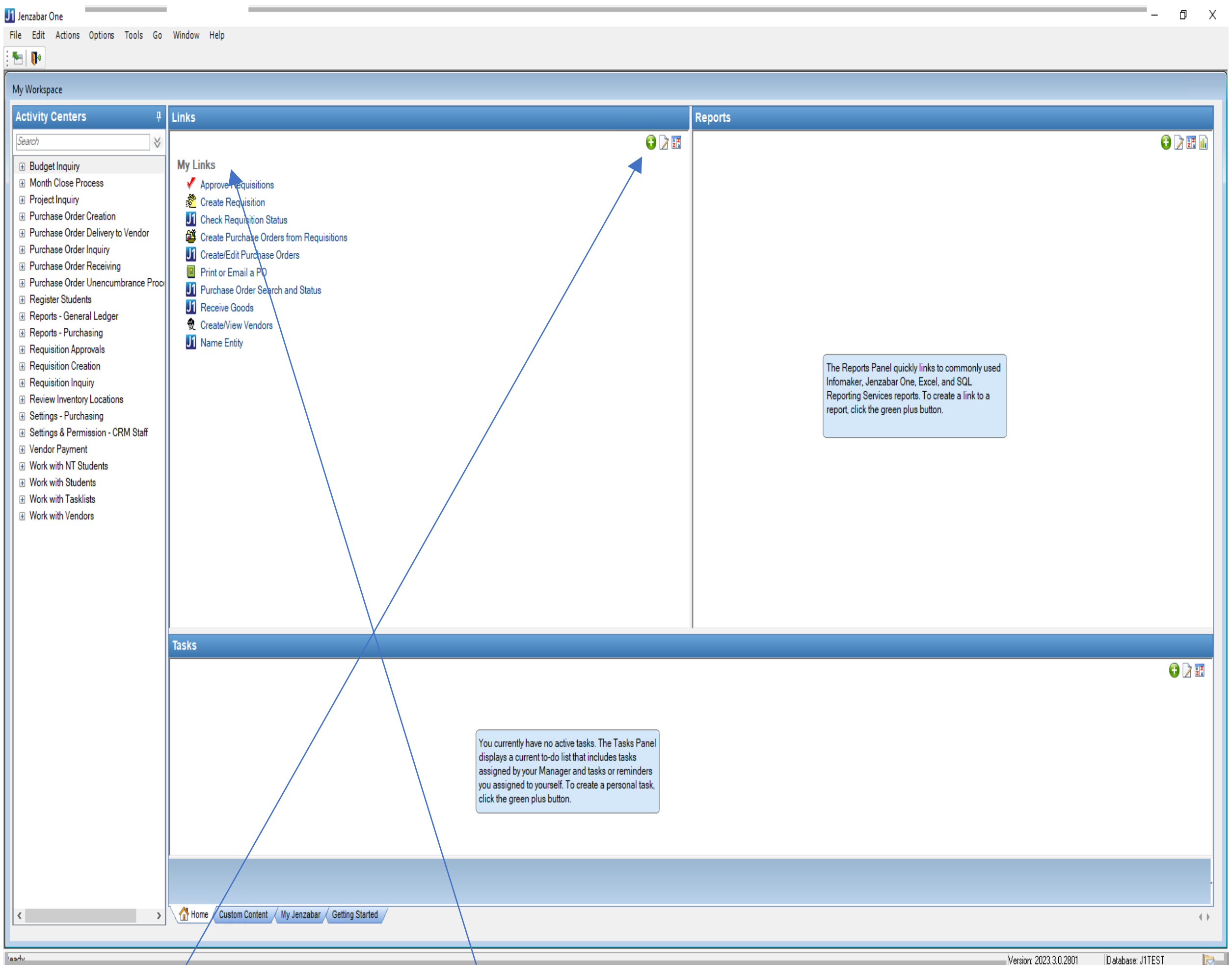
J1 defaults to the **Getting Started** tab. To customize the workspace, click on the **Home** tab.

Setting the Home Screen as the default location when opening J1 can be done by selecting **Tools** on the top of the screen, then **User Preferences** from the drop down.

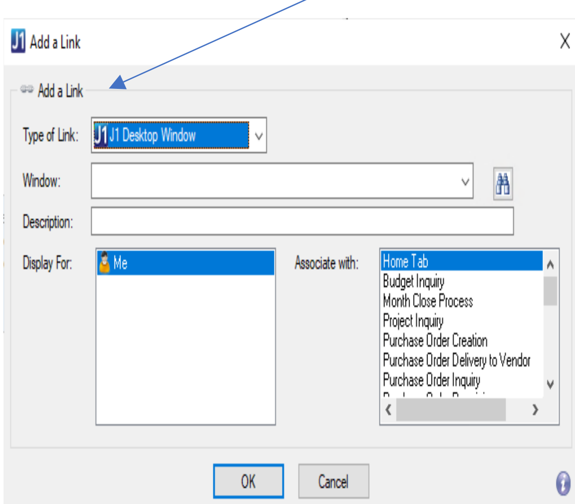


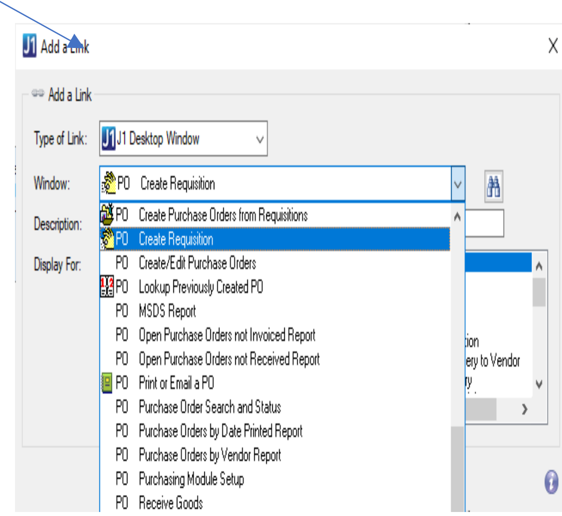
Select **Home** from the drop down under the **My Workplace Tabs**.

Setting up the Home Page



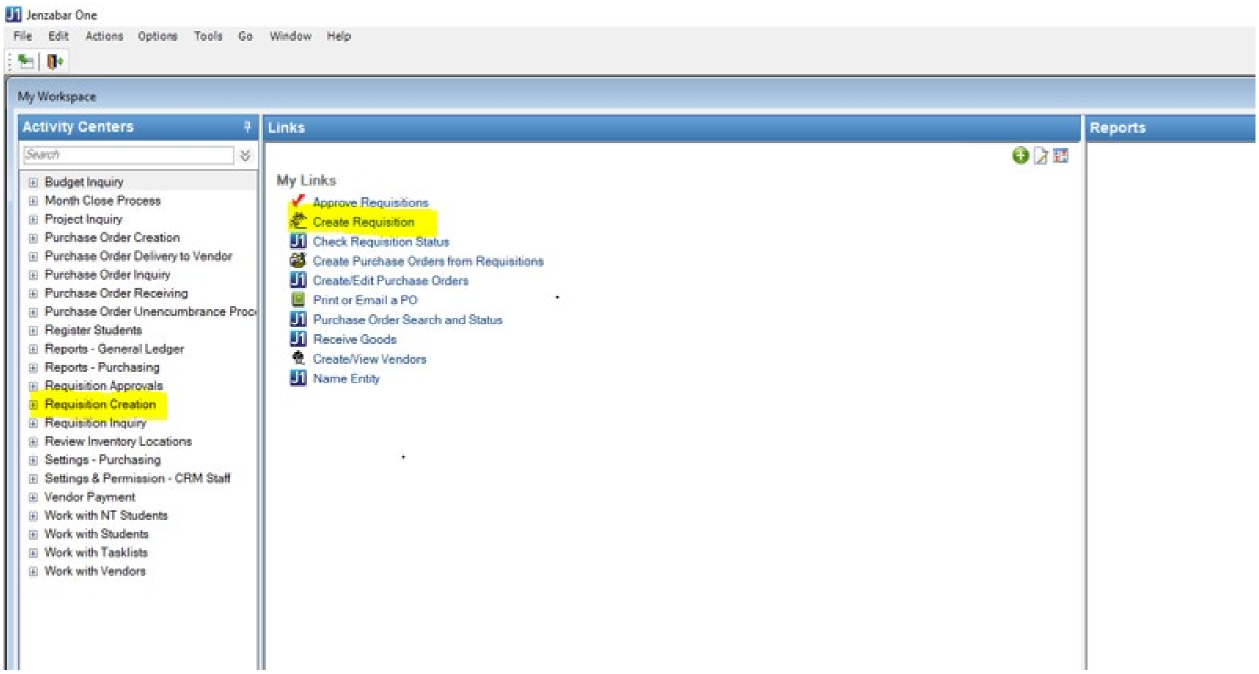
Click the **green +** to open the **Add a Link** Dialogue Box and select links from the Activity Center to display under **My Links** for easy access. The same can be done to add reports.



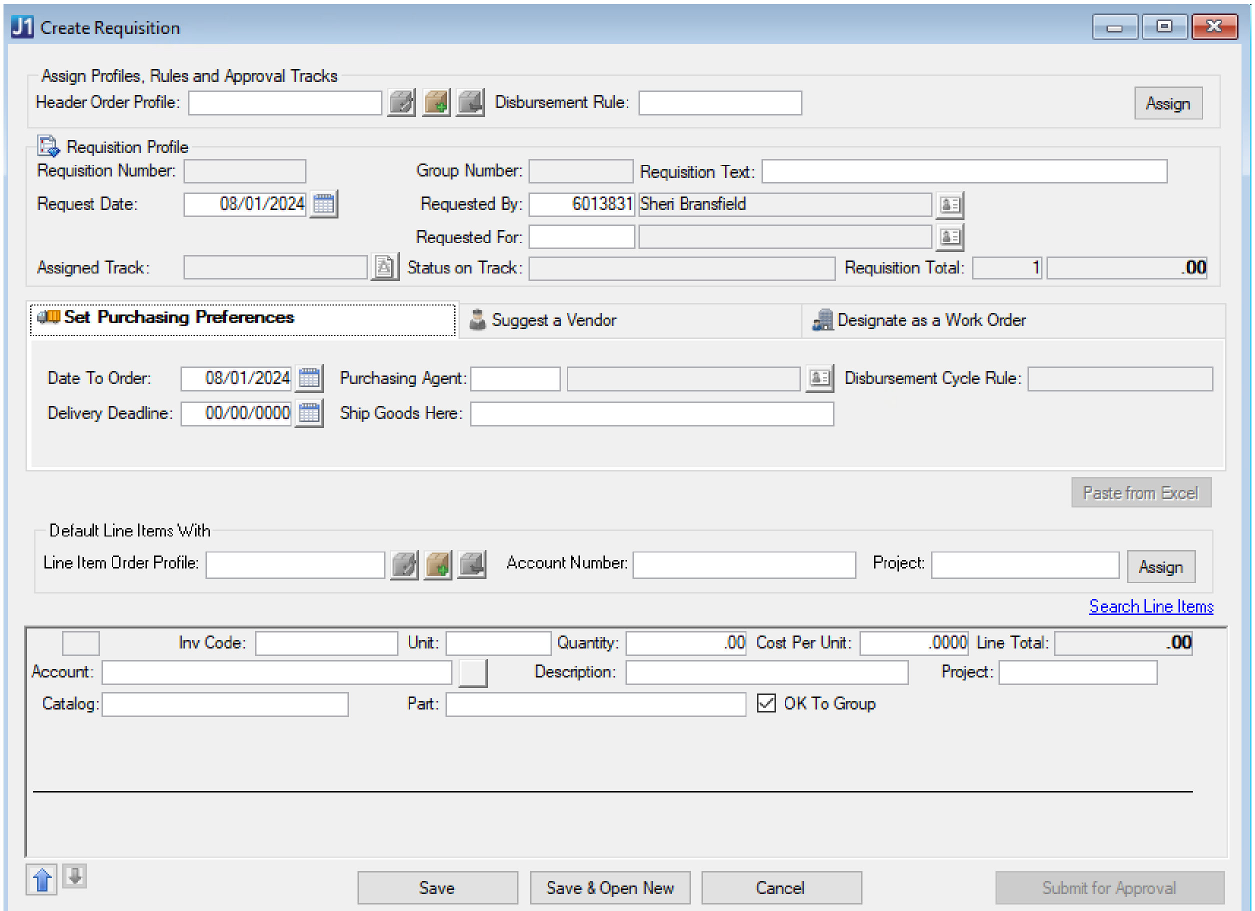


Creating a Requisition

Login to J1. On the My Workspace screen, on the left under the Activity Center, click on the **+ Requisition Creation** to open the drop down and locate **Create Requisition** link. This may already be saved as a favorite under "My Links" as shown in the screenshot below.



Click the **Create Requisition** link and a requisition form will open for data to be entered about the purchase.



A requisition consists of two main components: the **Header** and the **Details**.

Header – General information related to the entire requisition such as: Order profile, Disbursement rule, Approval track, Requestor, Vendor name and address, Purchasing agent, Delivery Deadline, Delivery location and Work order.

Details - Specifics on each individual item identified in the requisition such as: Expense account, Inventory Code (Not applicable), Catalog item, Description, Part number (Not applicable), Cost per unit and Associated project (IF applicable).

The information will be entered on the three tabs within the Requisition before submitting for approval. The tabs are **Set Purchasing Preferences**, **Suggest a Vendor** and **Designate a Work Order**.

Assign Profiles, Rules, and Approval Tracks

Header Order Profile

Leave this blank

Disbursement Rule

Leave this blank

Requisition Profile

Fully complete the following fields and save often (Control S):

Requisition Number

This field auto-populates when data has been entered and the Requisition has been saved.

Group Number

This auto-fills once the requisition is saved.

Requisition Text

On the Requisition profile, the **Requisition Text** field is specific to the purchase and should only contain one of these three options **in bold** below to communicate to Purchasing staff how to process the requisition:

1. **Non-Order**

   No ordering necessary. An example would be a One Card purchase that has already been made or a membership renewal where the vendor does not need a copy of the PO once approved.

2. **Process Order**

   This tells Purchasing to place the order with the vendor once approved.

3. **Send PO to** (add the email address where to send the PO)

This is sometimes needed when staff request a copy of the approved PO to place the order or when a vendor sales rep has requested a copy.

Request Date

The date the requisition is being completed.

Requested By

This should only be the individual completing the requisition and will autofill once the requisition is created.

Requested For

If ordering on behalf of someone else, enter their name in the **Requested For** field. Otherwise, be sure to enter your name. Start typing last name and the system will bring up a list of names to select and it may require scrolling down to locate the name.

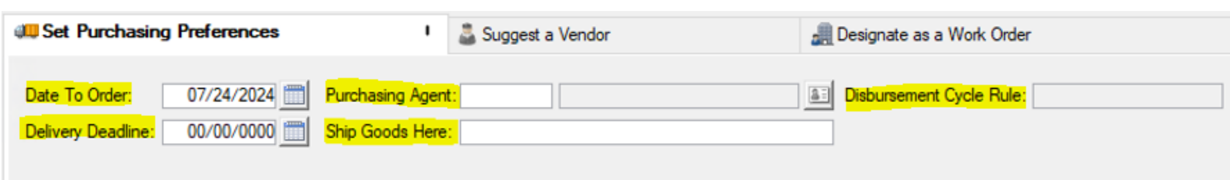
Assigned Track

This auto-populates once an account is assigned.

Status on Track

This auto-populates once an account is assigned.

Purchasing Preferences Tab



Date To Order

This field auto-populates to the date the requisition is created. It does not need to be changed.

Purchasing Agent

Leave Blank

Disbursement Cycle Rule

Leave this blank

Delivery Deadline

There are different considerations when completing the **Delivery Deadline** date box.

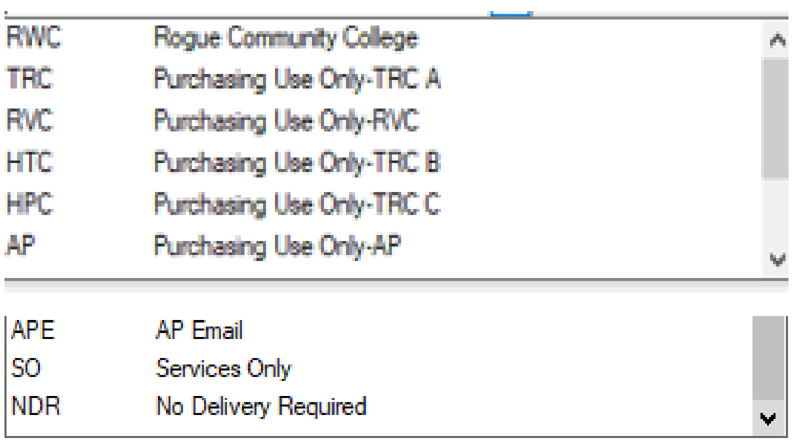
- When ordering items, the Delivery Deadline should be used to designate the date items are needed.
- If the purchase was made on the One Card, please use the date of purchase as the Delivery Deadline.
- If the purchase is to pay for services that have been completed, please use the date services were rendered. If services are pending, leave blank.

Ship Goods Here

When creating a requisition for items that will be delivered, only select the Redwood Campus address. The Purchasing Use Only addresses are to be used by Purchasing staff only.

If there are items that are too large or heavy and will need to be delivered to another campus location open the *comment bubble and indicate where the items need to be shipped as well as notifying shipping and receiving at shippingreceiving@roguecc.edu. Purchasing will change the ship to address to the appropriate location as indicated in the comment when creating the purchase order.

The *comments bubble will be discussed in detail below.

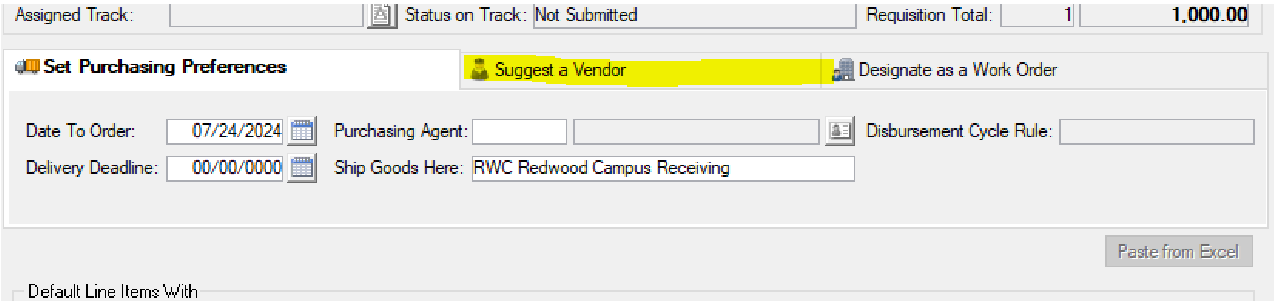


If the **One Card** was used for an in-store purchase and there are no items needing to be delivered, please select **No Delivery Required**.

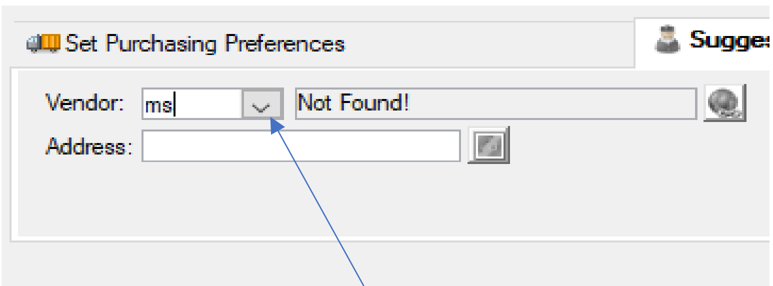
If the requisition is for **services** such as a renewal: i.e., memberships, software licensing, contracted services, etc., please select **Services Only** from the Location drop down menu.

Suggest a Vendor Tab

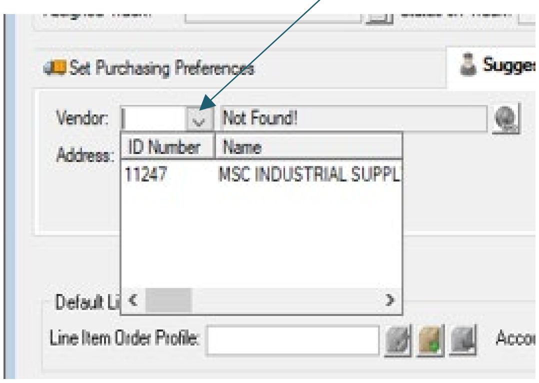
Click on the **Suggest a Vendor** to open the tab.



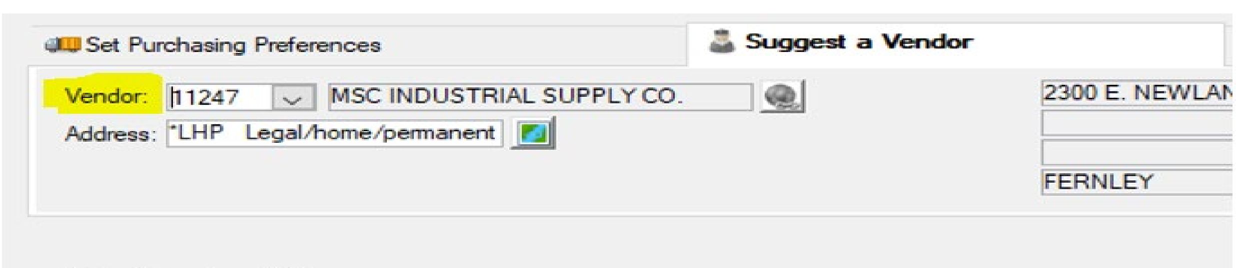
Click in the Vendor box and begin typing the name of the vendor.



Then click on the drop down and a list of vendors that match your criteria will show below, scroll down as needed to locate the appropriate vendor to select.

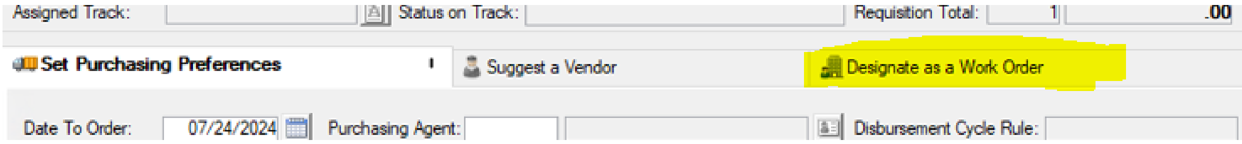


In the example, MSC was typed in the Vendor box and selected in the drop down. The system auto populated with the vendor data.

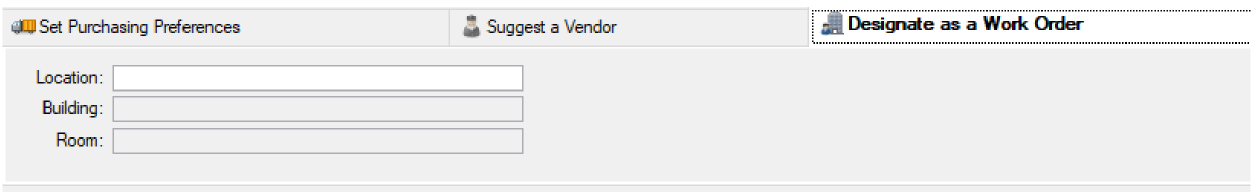


Designate as a Work Order Tab

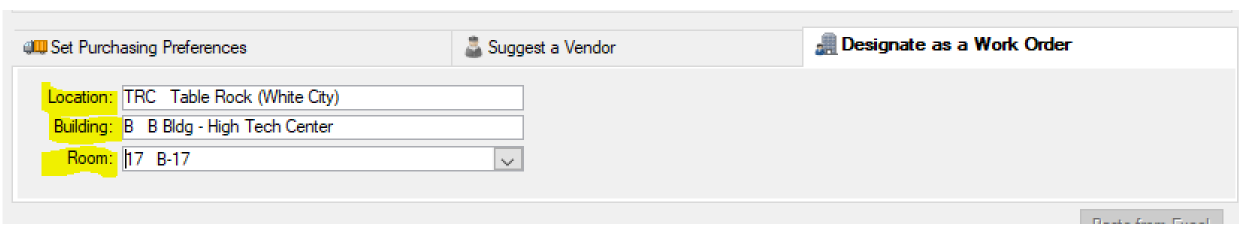
Click Save and select the **Designate a Work Order** to open the tab. This is where staff will designate a **delivery location**.



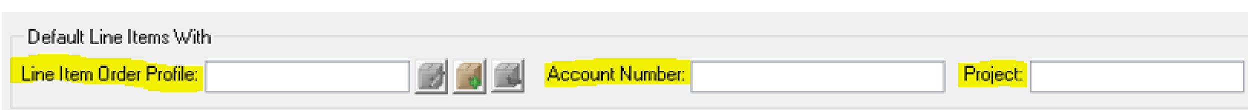
Enter the location of where the items should be delivered once they arrive at the Redwood Campus and have been received in the system. Or if the items are shipping directly to another campus due to size, etc., it is necessary to know where these items should be delivered.



Select the Location, Building and Room from the drop-down menu until it is complete. This will be used by Shipping and Receiving to deliver items to the appropriate location.



Line-Item Details (how to enter the order information)



Line-Item Order Profile

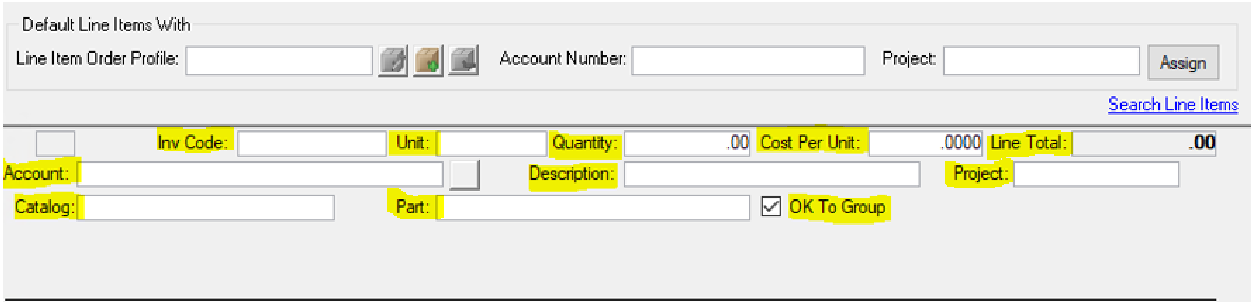
Leave blank

Account Number

Leave blank

Project

Leave blank



Inv Code

Leave Blank

Unit

Enter only the bold two letter code **EA** – Each, **BX** – Box or **CS** - Case for the item(s) being purchased.

Quantity

Enter the number of items (UNITS) being purchased.

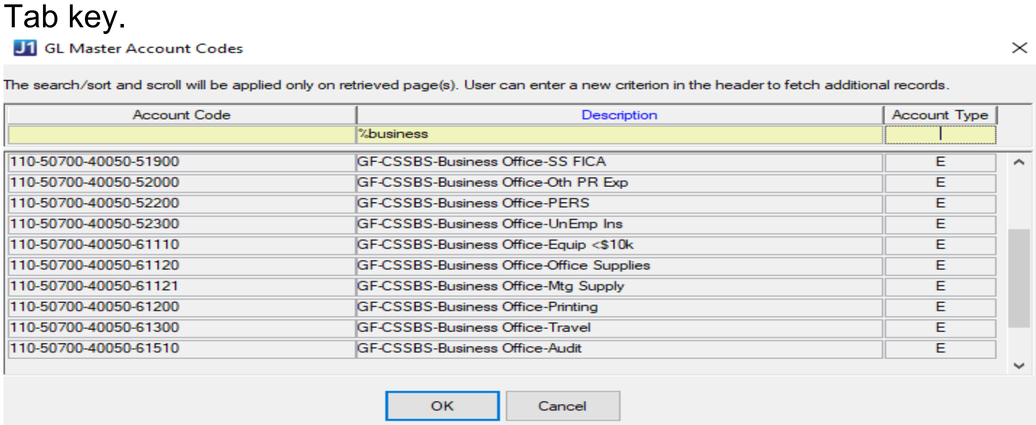
Cost Per Unit

Enter the **Cost Per Unit**. It is important to use unit pricing when ordering more than one quantity. This ensures the items are received and paid for in our system properly.

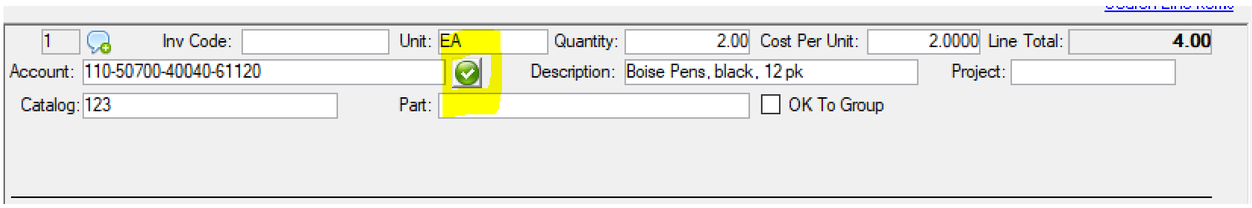
If an item has no cost but needs to be listed, enter it as a cost per unit of .0001, this will not calculate a cost for the item but will allow it to be listed on the PO when created. (The system will not recognize a zero-dollar item)

Account

Type in the **Account Number** or right click in the account number box and select Account Number List from the drop down. Click in the box below Description and enter your department name. NOTE: A **%** is needed in front of the department name for the system to "search" and locate the name. E.g., %Business or %Business Office. Then click the Tab key.



Note: *When the checkmark next to an account number is green, this indicates that the account has budget available. When a red X is next to the account number, this indicates that the account is over budget. A requisition that is over budget will not allow a user to send for approval.*



Description

Enter the **Description** of the item being purchased. There is a limited number of characters allowed in this field. Be as clear and detailed as space allows. If additional data is needed, please add this information in the *comment bubble for reference. E.g., Meeting specifics and student travel details.

Project

Enter a **Project** if applicable. Otherwise leave blank

Catalog

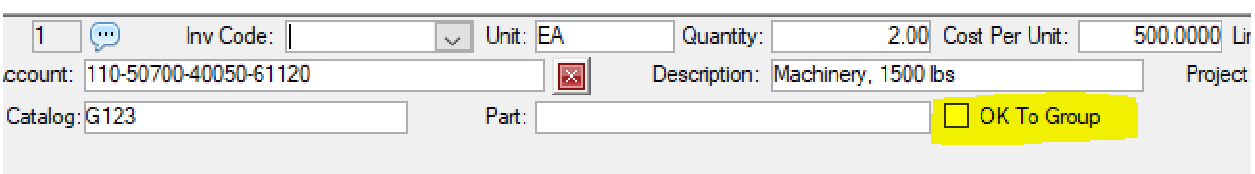
The **Catalog** field is for entering a part number for the item being ordered. **IF** the purchase was made on a One Card, please use this field to enter the place and date of purchase. E.g., Albertsons- 7/31

Part Number

The **Part Number** box is not available for use.

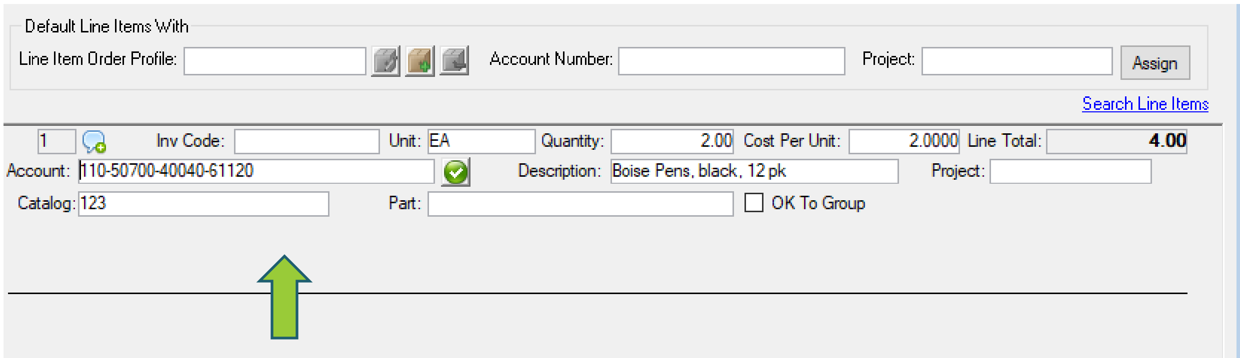
OK to Group

Always uncheck the "**OK to Group**" box. The purpose of this box is to add requisitions to one purchase order. This is not a function that will be used at this time.



Adding Additional Lines to the Requisition

If there is more than one item being purchased, right click near the details box and select Add Row from the drop down. This will create another line on the Requisition.

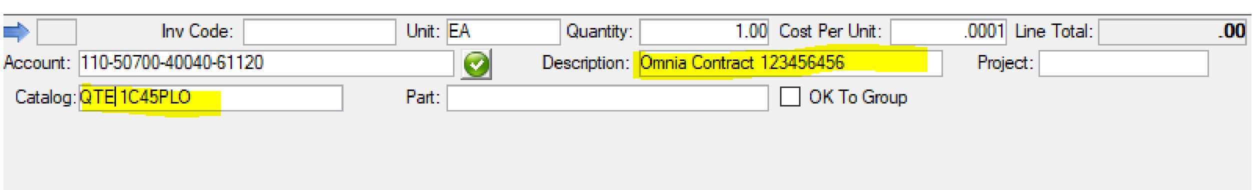


Continue to add rows as needed until all items are entered for purchase. Complete each line as detailed above. This includes items that may be included in the purchase but are at no additional cost to the College. *In order to enter this information on the requisition without increasing the cost, the Cost per Unit would be entered as $0.0001. The system does not allow a zero-dollar amount and therefore will not allow the requisition to be sent for approval using a unit cost of $.00.

Quote and Contract Information

Quotes and/or contract data should be referenced on the requisition and quotes attached. Vendors use this information, and many require it to be noted, to ensure the price "quoted" is honored when the order is processed. This means the quote and contract number, if applicable, should be added as a line item on the requisition using the Cost per Unit of $0.0001 as listed above.

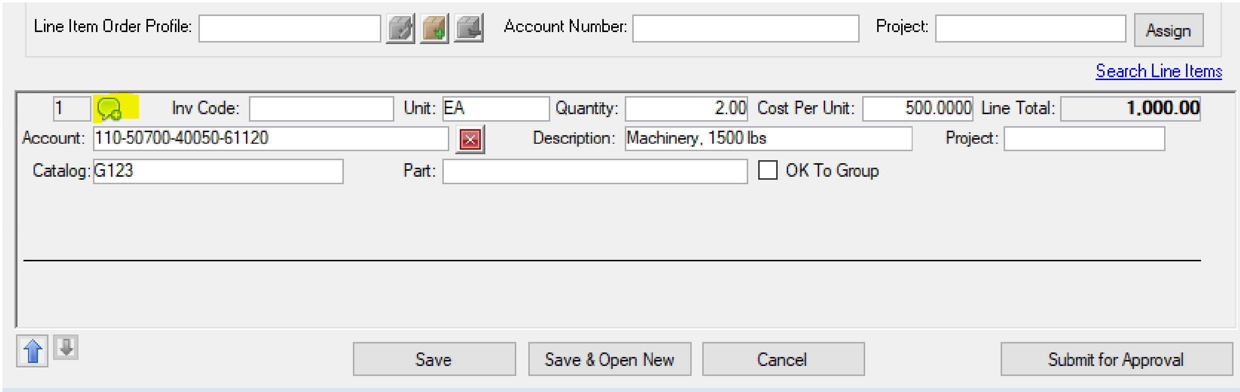
In the image below, the name of the contract and contract number are listed in the description box. The quote number is referenced in the Catalog box. If the quote number is too long for the Catalog box, add an additional line for the quote information.



Save the Requisition.

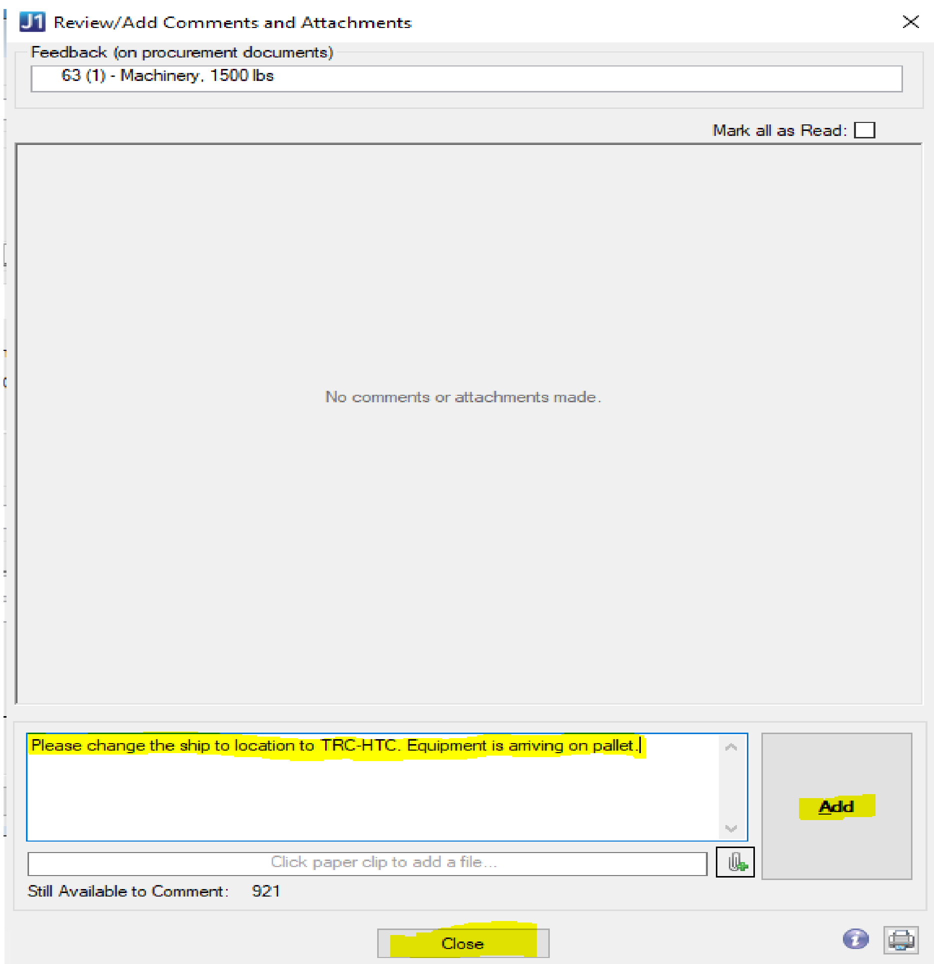
Upon saving, the system will activate the *comment bubble to add notes and/or attach quotes as needed.

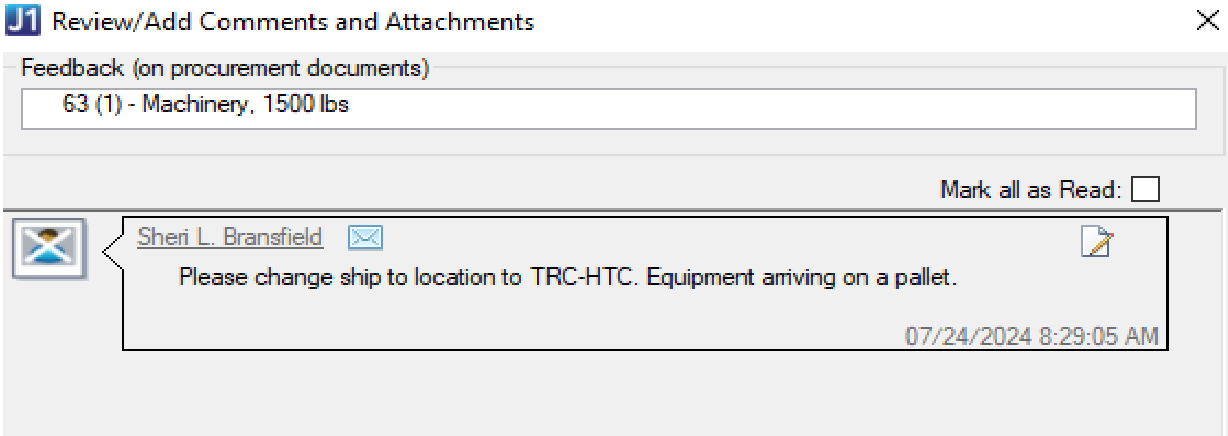
***Please note the comment bubble does not display until the Requisition is saved**.



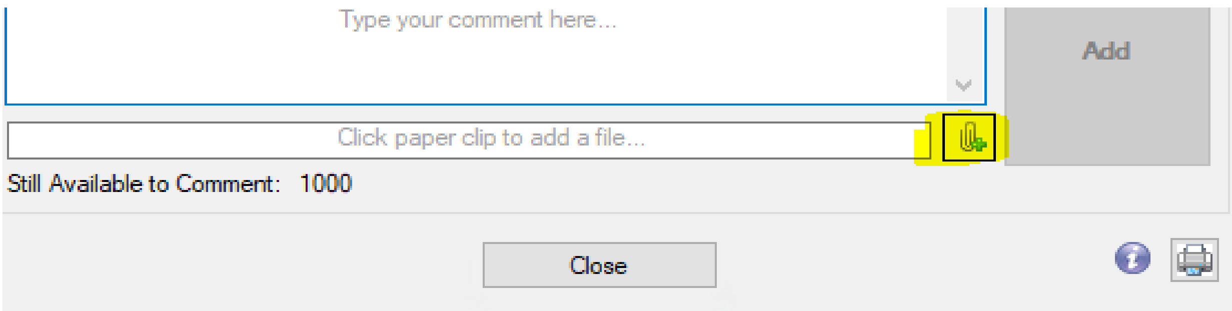
Click on the comment bubble to open the dialog box. Type a message or add information as needed in the comments box and then click Add. The message is for internal use only and does not transfer to the PO document once created.

Quotes and other correspondence should be attached to share with Purchasing regarding the order and provides documentation for the audit file.

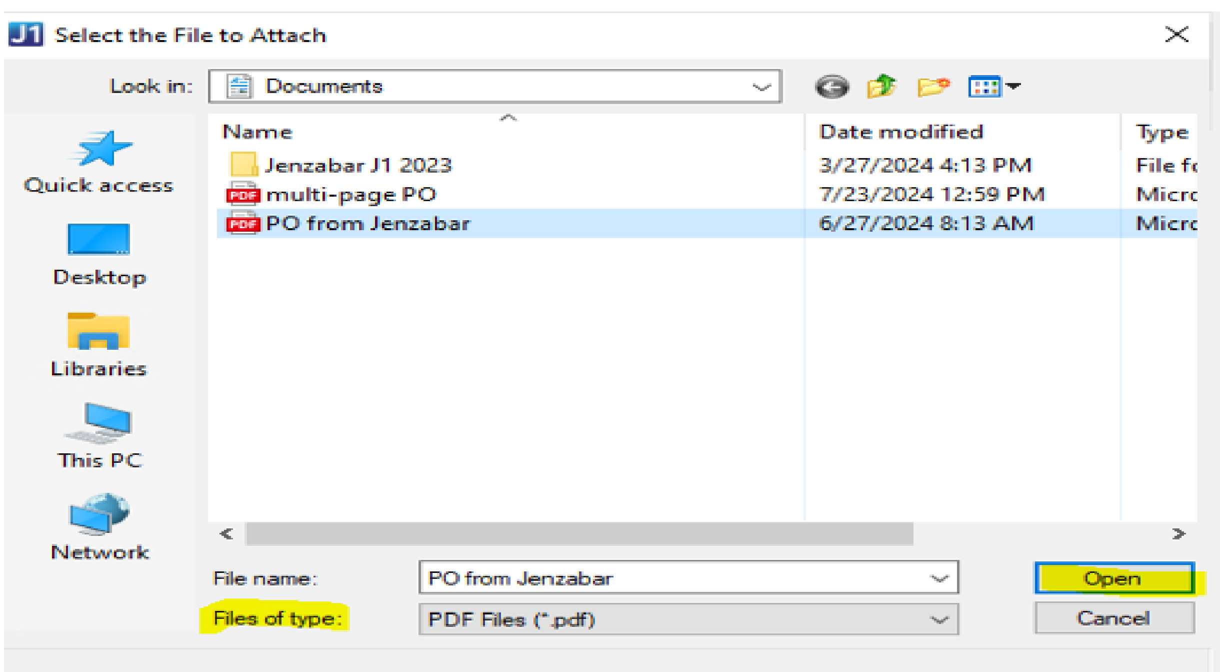




If adding a file, such as a quote or correspondence, click on the paperclip to attach the document to the Requisition.



A dialog box will open. Be sure to select the appropriate file type and then locate the file to attach. Click open when done and the document will be uploaded to the requisition.

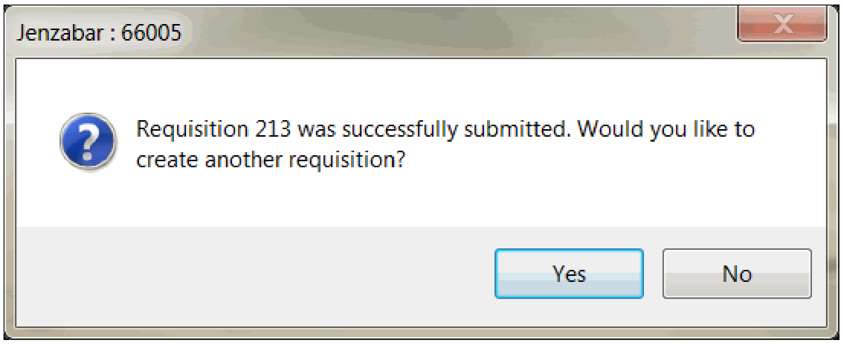


Once this is done, click close and the system will go back to the Requisition screen.

Note: *The comments bubble is also where information about a returned or denied requisition may be found.*

Carefully review the requisition to ensure it is completed properly and has all the pertinent data for the purchase.

The last step is to **<u>Save and Send for Approval</u>**. A dialog box will appear indicating the requisition was successfully submitted along with the number that has been assigned to this specific requisition.



The Requisition will go through an approval process which can be reviewed for status updates under **Check Requisition Status**.

Additional Notes

Returning a Requisition

If a requisition needs to be returned for modification, it can only be returned by someone in the Approval Track. The person who is next in line for approval (pending approval) is the only one who has the ability to return it. This information can be found in Requisition Status by viewing the approval track. Purchasing no longer can return a request when it is waiting for approvals by others.

Denied Requisitions

If a requisition is denied, it will no longer be available for modifying/correcting and submitting for approval. If it was denied in error, the system allows for copying a requisition and creating a new one. The newly generated requisition can be modified as needed and sent for approval.

Notifications

Notifications via email should be sent to the originator if a requisition has been returned or denied. In addition, the requisitioner along with Purchasing should receive notice once the requisition has been approved. Please note to check the status of requisitions often.

Receipts

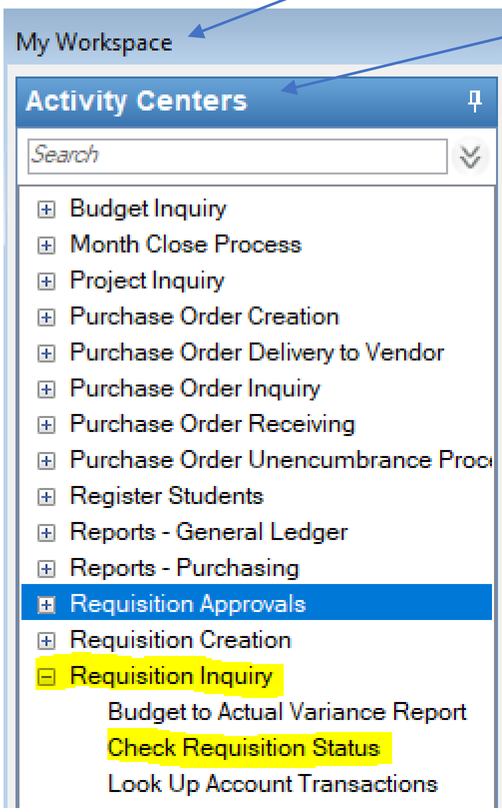
All receipts for reimbursements should be sent to Accounts Payable via email at Accountspayable@roguecc.edu with the corresponding Requisition number written on the receipt. All members of the Accounts Payable team will get the email and can process.

Amazon, Office Depot and Staples Advantage Orders

When placing an order for approval with the vendors above, remember to add the Requisition number as the PO number for the order. Purchasing will update the number to the actual PO number once requisition is approved and the order is released.

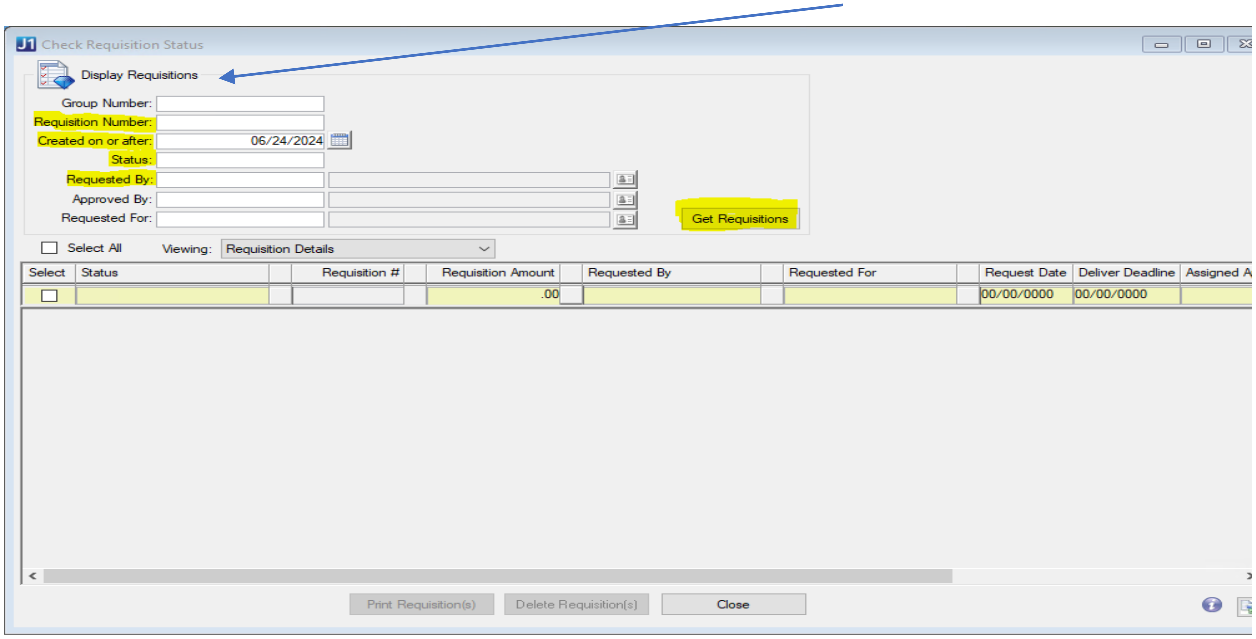
Checking the Status of a Requisition

Login to Jenzabar. On the **My Workspace** screen, on the left under the **Activity Center**, click on the **+ Requisition Inquiry** to open the drop down and locate the **Check Requisition Status** link.

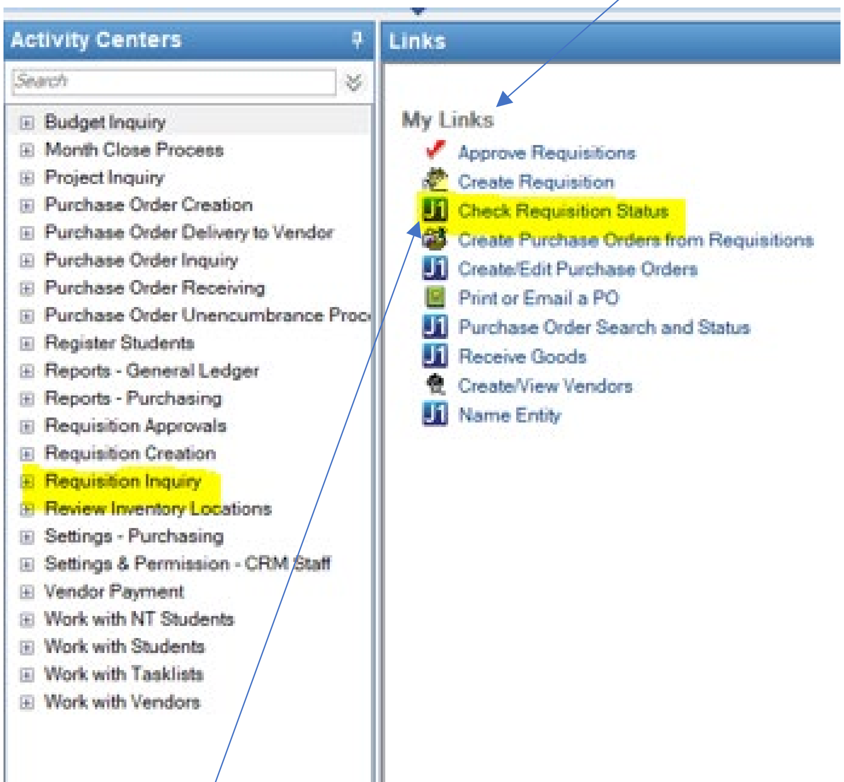


The search criteria in the Activity Center will vary depending on each users permissions.

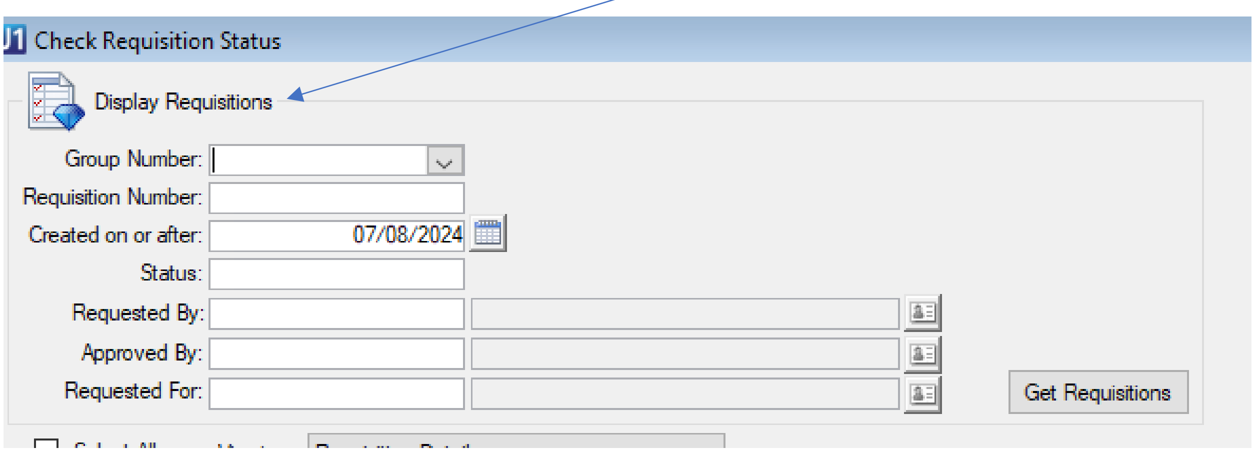
Click the **Check Requisition Status** link and the **Display Requisition** window will open.



This may be saved as a favorite under “My Links” as shown in the screenshot below.

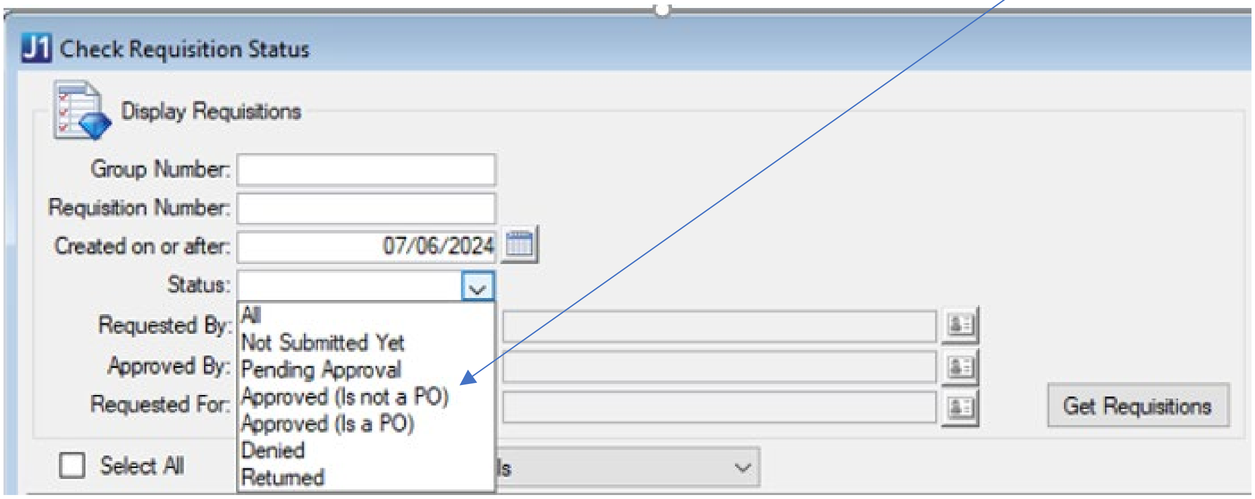


Click the **Check Requisition Status** link and the Display Requisition window will open.



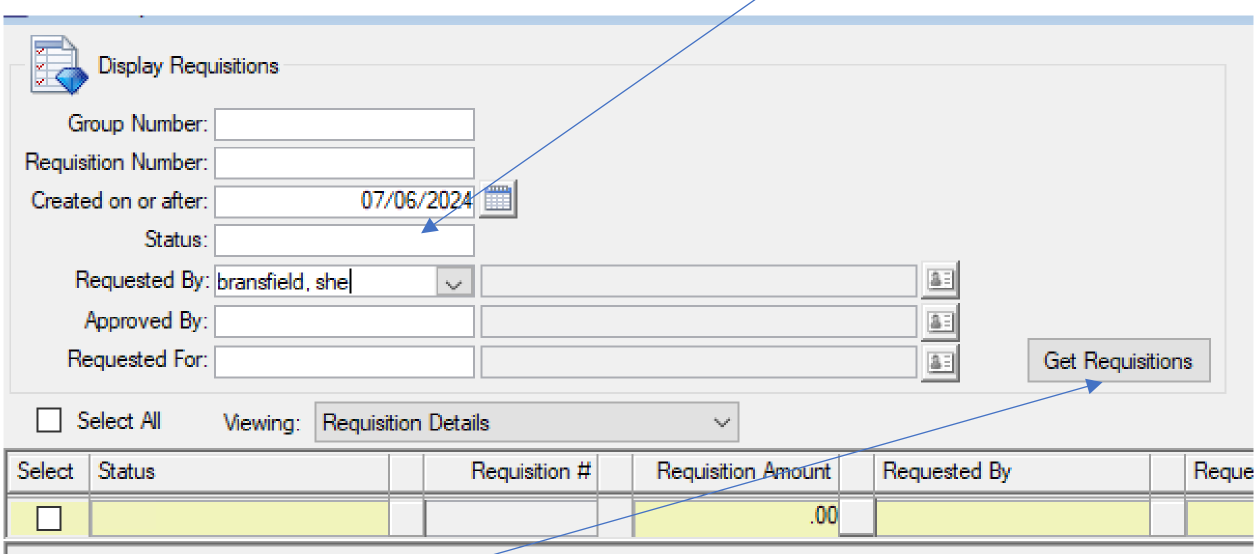
By clicking on any of the fields above, a drop-down menu will provide options within that field.

The criteria to narrow down the number of requisitions being displayed by Status is listed in the drop down below.

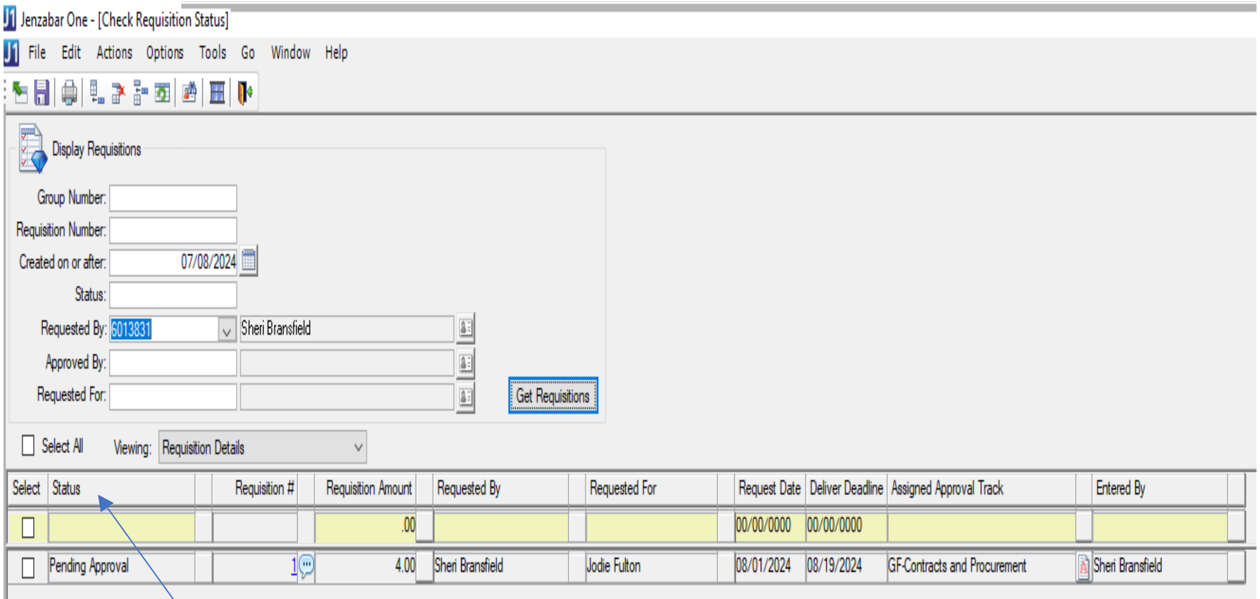


Note: *If no criteria are selected, the list will display requisitions created by ALL users.*

When searching for requisitions created by name, click the box next to Requested By and start typing the name of the staff person. Then click on the drop-down arrow and the field will bring up a list of names to select, scrolling may be necessary to get to the desired name.

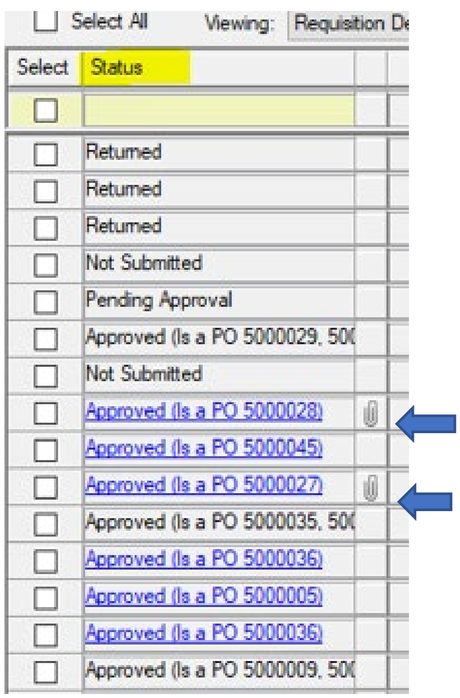


Click the **Get Requisitions** button and the system will display the ones within the desired criteria or if selecting no criteria, it will show you a list of all requisitions and the status of each. Expand the window to see all columns within the screen.



By clicking on any of the header columns, the system will organize the data. For example, if you click on **Status**, the system will re-organize the display to group each type of status together.

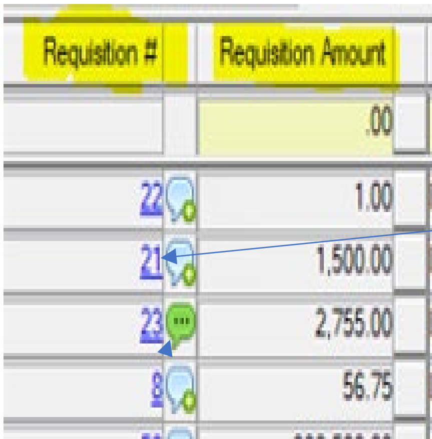
There are several columns with detailed information regarding the requisition and are defined below. The first column specifies the actual status for the requisition.



The detailed status will reflect one of the following:

- Not Submitted
- Pending Approval
- Returned
- Approved (Is a PO XXXXXX) The blue text is a hyperlink to view a Purchase Order once created
- Approved (Is not a PO) The requisition is approved but Purchasing has yet to change the status to a Purchase Order

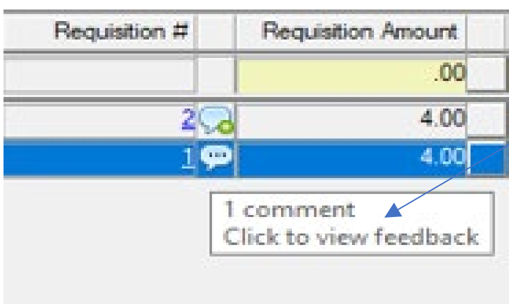
In the screenshot above, a paperclip to the right signifies an attachment exists. This was done when the requisition was created and a document, such as a quote, was added for audit purposes.



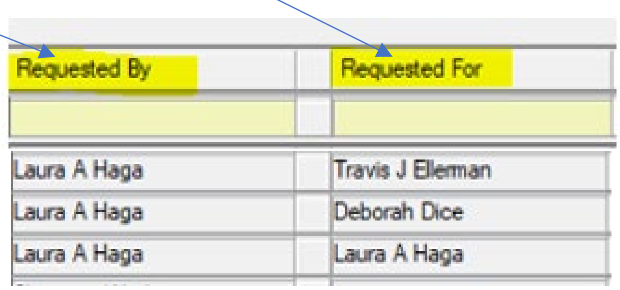
The Requisition # column displays the corresponding requisition number. This number was generated when the requisition was saved before sending for approval. The blue font indicates a hyperlink which can be clicked if wanting to view the requisition details.

The total cost of the requisition displays in the Requisition Amount column. This may be useful if multiple requisitions were created and looking for a specific dollar amount.

If a Requisition contains a comment or an attachment, the comment bubble will display in green with three dots. Hover over the bubble and a note will display. Click the bubble to view.



The Requested By and the Requested For columns indicate the designated staff.



The Request Date is the date the requisition was created in the system. The Deliver Deadline is a field that was completed when the requisition was created. The date will vary depending on the circumstance of the purchase.

Request Date	Deliver Deadline
00/00/0000	00/00/0000
07/01/2024	07/15/2024
07/01/2024	07/15/2024
07/01/2024	07/31/2024

The Assigned Approval track will show the name of the department that was tied to the account on the requisition. It is important to understand the process of approval and to view who may be approving requisitions.

Assigned Approval Track
GF-Shipping & Receiving
Business Office
Community and Workforce Development

The symbol next to the department name is an active link. When clicked it will bring up the approval chain for the assigned account.

The image below shows the approval track and status for a selected requisition. The number of staff approving may vary.

Approval Track Members

Approval Track

Track Name: GFCOPR

Approval Order	Name	Approval Status	Date Approved\Denied
			00/00/0000
First	Jodie Fulton	Pending Approval	00/00/0000
Second	Lisa Stanton	Pending Approval	00/00/0000
Third	Sheri Bransfield	Pending Approval	00/00/0000

The Entered By column is the last column within this screen. This identifies the person who entered the requisition.