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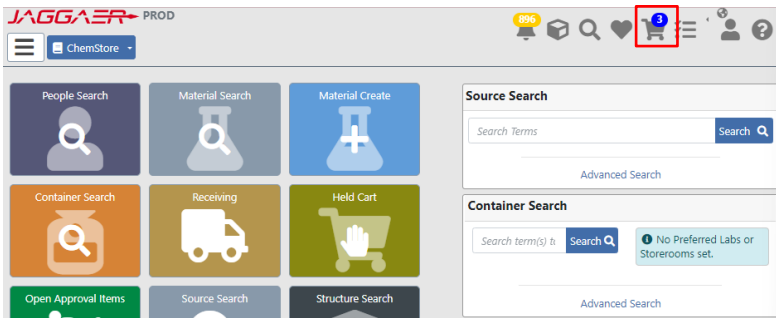
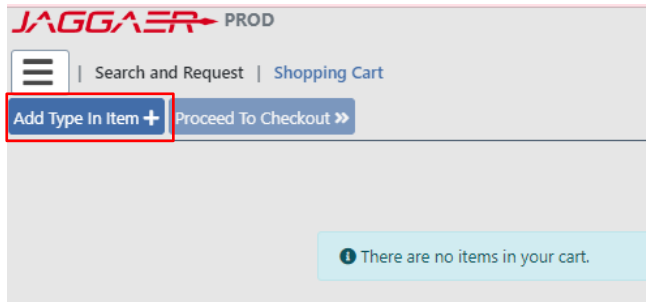
1. Overview

Type In Purchasing Procedure is used to submit an order for a chemical or consumable that cannot be found in the Jaggaer Hosted Catalogues. Users usually search for the item on supplier's website, or reach out to the supplier for a quote, then place an order through Jaggaer.

!IMPORTANT NOTE BEFORE PLACING AN ORDER!

- Please do not add a UNSW Store item with a Hosted Catalogue or Type In item in the same shopping cart as it will not be processed properly.
- Hosted Catalogue and Type In item can be submitted together.
- For any single equipment or item categorised as an asset with a value over \$10,000: Please contact your respective Finance team to raise a Purchase Order. Do not place this order through Jaggaer.

2. Type In Purchasing Procedure

Step	Screenshot
1. In the Home page, click on the Shopping Cart icon on top right corner 	
2. Click Add Type In Item	

3. Add Type In Item

- ① Fill in all compulsory fields *
- **Product Name**
- **Supplier:** Choose the supplier from the dropdown list
- **Catalog #**
- **Order Quantity**
- **Pkg Quantity, Package Unit of Measure, Number Units/Item:** based on product detail
- **Price, Currency**
- **Item Category Code:** Select the appropriate category for the item from the dropdown list.

Optional fields:

- **CAS #:** Compulsory for chemicals
- **MDL#**
- **Attachment:** Users can attach the quote of the item, which is visible for Finance team to process the order
- **Internal Note:** Note for Finance (e.g. quote #, freight cost)
- **External Note:** Note for supplier (e.g. delivery requirements)
- ② Click **Save** then click **Back To Cart** to add the item to your shopping cart.

The screenshot shows the 'Add Type In Item' form in the Jaggaer system. Red boxes and numbers highlight key areas:

- Box 1:** The top section containing Product Name, Supplier, Catalog #, Order Qty, Pkg Quantity, Package Unit of Measure, Number Units/Item, Price, Total, and Currency.
- Box 2:** The bottom section containing CAS #, MDL #, Attachment, Attach Structure, Internal Note, External Note, and Item Category Code.

 A dropdown menu for 'Item Category Code' is open, showing a list of categories: Chemicals, Clinical Consumables, Equipment (Non-Asset), Gases, Lab & Workshop Supplies, Lab Consumables, Lab Instruments & Equip, Life Science Consumables, Other Consumables, and Safety Equipment.

Note on Catalog #: Catalog # must **NOT** contain any whitespaces and/or special characters, e.g. ®, ™, μ (replace with 'u'). Else, your orders will be cancelled.

Note on Supplier: If supplier is not in the list, contact Finance Services to check if the supplier is active. If not, submit [Vendor Application Form](#). Once approved, notify admin to add to Jaggaer.

4. Match Material (compulsory)

- ① Click on the dropdown icon and select **Match Material**.
- ② Search for the appropriate material in the **Search** bar.
- ③
 - (a) If found, select the appropriate material from the search results
 - (b) If not found, tick **No Suitable Match Listed, Create Material** → click **Select** to create a new material.

Based on the safety warnings of the matched material, orders will require different types of approval.

The screenshot shows the 'Type In' interface. A dropdown menu is open, showing options: Match Material, View SDS, Edit Item, Edit Storage Code, and Set Radioactive Flag Manually. A red box highlights the 'Match Material' option, with a red circle and arrow pointing to it labeled '1'. Below the dropdown, a search bar is visible with a red circle and arrow pointing to it labeled '2'. The search results show a list of materials with safety warnings. A red circle and arrow labeled '3' points to the 'No Suitable Match Listed, Create Material' option. A callout bubble contains the text: 'Note: An order with a new material created will require New Substance approval from EHS User.' Another callout bubble contains the text: 'Tip: For lab consumables, search and select 'Lab Supplies'.'

5. Check Shopping Cart

- ① Click on the dropdown under **Class** to select the appropriate material class of the item.
- ② Input **Order Quantity**. Total price will be updated accordingly.
- ③ Once done, click **Proceed to Checkout**. A new window will appear.

The screenshot shows the shopping cart interface. A red box highlights the 'Class' dropdown menu, with a red circle and arrow pointing to it labeled '1'. The dropdown menu is open, showing options: Chemical, Chemical Do Not Create Container, and Lab Supplies. A red box highlights the 'Order Qty' input field, with a red circle and arrow pointing to it labeled '2'. The input field contains the value '1'. A callout bubble contains the text: '1. Please select material class'.

- **Chemical:** used for all GHS classed chemicals that will create containers upon receipt.
- **Lab Supplies:** used for any non-chemical items and no containers will be created

6. Checkout

Complete all mandatory fields denoted by the red asterisk *

- **Cart Name:** Auto-generated
- **Recipient:** Auto-filled
- **Delivery To:** Default receiving location assigned to user profile
- **Cost Centre:** Choose one cost centre for the shopping cart.
- **Financial Approver:** Select an appropriate financial approver for your school/division by searching in the dropdown list.
- **Freight** (optional): Enter freight amount in **numerical value only**.
- **Intervention Required:** Select **No** if no intervention required
- Click **Submit**

The screenshot shows the Jaggaer checkout interface. The top navigation bar includes 'JAGGAER PROD', 'Search and Request', 'Shopping Cart', and 'Checkout'. A 'Submit >>' button is highlighted with a red box. Below, the 'Cart Name' field is auto-generated. The 'Recipient' field is auto-filled with 'Linh To (25272228@ad.unsw.edu.au)'. The 'Deliver To' field is set to 'UNSW STORE LOWER>EB>G> Lower Campus Store'. The 'Cost Center' dropdown is highlighted with a red box, showing 'SAFETY-OP001-NO_PROJECT'. The 'Financial Approver' dropdown is also highlighted with a red box. The 'Freight' field is empty. The 'Intervention Required' field is set to 'No'. The 'Manual Intervention Reason' field is empty.

Note: If freight required, select **Intervention Required = Yes** and **Manual Intervention Reason = Freight**

Note: Freight amount **must** be in numerical value only (i.e. no currency symbols or whitespaces) or leave blank if unknown. Any additional notes should be entered in the **Internal Note** section.

3. Frequent Order Cancellation Reasons

Here are some common reasons why a Jaggaer order might be cancelled and how to avoid them:

- **Freight Amount Invalid:** Ensure that the freight amount is provided in **numerical value** only, without any currency symbols or whitespaces (e.g. '\$' sign, 'AUD'). If unknown, leave the field blank. Any additional notes should be entered in the **Internal Note** section under **Edit Details**.
- **Cost Centre Invalid:** Verify that the centre codes assigned to your profile are in the correct format of **DepartmentID-FundID-ProjectID** with no extra whitespaces in between. If your cost centre codes are not in the correct format, notify your local Jaggaer admin for an update.
- **Cost Centre Inactive:** Ensure that your cost centre code is active in Finance system NSF. If not, contact Financial Services team at your organisation to request reactivation or change to another active cost centre.
- **Catalog number Invalid:** Catalog number must **not** contain any whitespaces and/or special characters, e.g. ®, ™, μ (replace with 'u').
- **Total Requisition Amount > Financial Delegation Amount:** When selecting a Financial Approver, ensure their delegation amount (in AUD) is equal or greater than the total amount of your orders. You can find their delegation amount next to their names while searching (Name – School – Delegation Amount).