



**JAGGAER**

## Supplier Registration & Navigation Guide

### **Supplier Guidance**

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## Contents

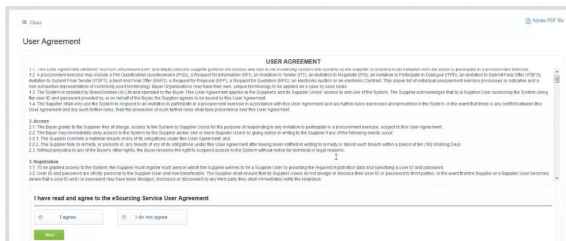
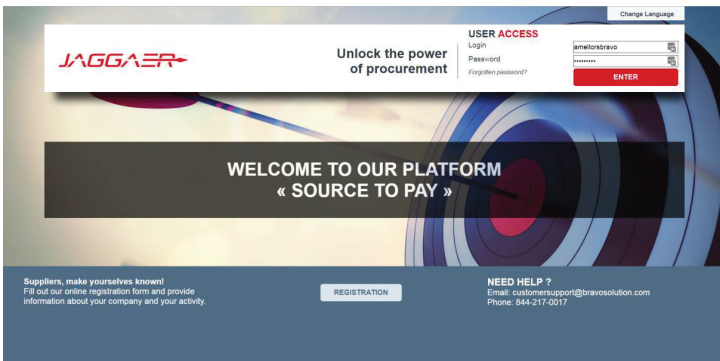
In this guide, we will show you how to:

- Register as a Supplier on the Sourcing Portal
- Complete the Registration and Basic Profile
- Select Categories of Supply
- Benefits of Category Classification
- Login as a Supplier
- Access the Supplier Home Page and Dashboard
- Access User Management and Sourcing Events

**Please keep in mind that this is a generic guide to assist in registering on the eSourcing platform powered by Jaggaer. It is not specific to any project, contract or buying organisation!**



# Register as a Supplier



1. Access the Sourcing portal \*.
2. Click the **Registration** on the Login page (text may vary) to create an account.
3. You may be directed to a User Agreement.
4. Read the User Agreement.
5. Tick **I agree** and click **Next** to access the Registration form.

**Note: Registration on the portal is free.**

\* The Sourcing portal Login page can be customized to reflect the branding of the buyer organisation and may differ in appearance from what is shown here.

# Register as a Supplier

The screenshot displays a registration form with two main sections: Organisation Details and User Details. The Organisation Details section includes fields for Organisation Name, Address, City, State/Country, Postal Code, Country (set to UNITED KINGDOM), and Don & Bradstreet. The User Details section includes fields for First Name (Jane), Last Name (Smith), Email Address (janesm), Username, Preferred language, and Time Zone. A 'Save' button is visible at the top right of the form.

1. Fill out all mandatory fields, marked with a red asterisk (\*).
2. The **Organisation Details** and **User Details** collect information for the individual within your organisation that will be the account main user or super user.
  - Ensure the email address \* is correct in order to receive the registration confirmation email with a temporary password for your supplier account.
  - To register multiple email addresses, use a semicolon to separate them.
  - Keep track of the Username entered, you will need this to login.
4. Once all mandatory fields are complete, click **Save**.



\* There may be a user email address validation. If so, click Send Validation Code. Check the email address entered. It may take a few minutes for the code to be sent. Enter the code into the validation field to continue.

# Complete 'Basic Profile' Form(s)

**Basic Profile Form: Registration Form**

Registration

Registration Data → **Basic Profile Forms** → My Category Selection → Registration Confirmation

**Company Information**  
Provide the below general company information.

UK Coverage • Please indicate which of the following UK countries your company can provide services to.

- England
- Wales
- Scotland
- Northern Ireland

Global Coverage • Please indicate which regions your organisation can supply.

- Western Europe
- Central and Eastern Europe
- Nordics
- Russia
- North America
- South America
- Asia
- Middle East
- Africa
- Australia

Revenue • Revenue for the current year (Financial year).

Corporate social responsibility policy • Please upload a document detailing your company's Corporate social responsibility policy.

Click to attach files

Save & Continue Cancel

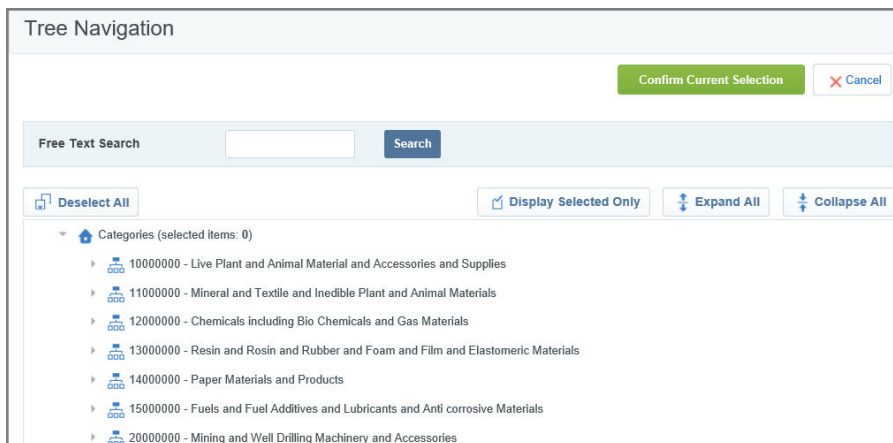
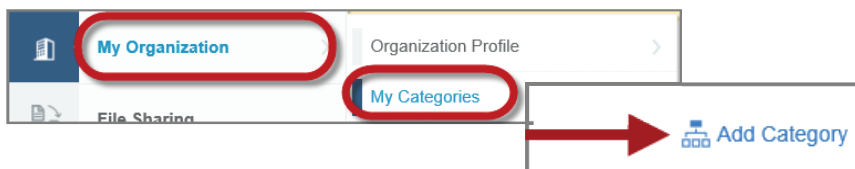
## Basic Profile Form

- You may be directed to a Basic Supplier Profile Form to provide additional organisation information.
- **You must complete this information to be considered for sourcing events.**
- This information could be used to auto-populate question responses in sourcing events.
- You may update your profile at anytime following registration by accessing your organisation's profile area.

## Complete the Form

- Complete all mandatory fields.
- **Click to Attach Files** allows you to upload files as a response.
- Once all mandatory fields are complete, click **Save & Continue**.

## Select Categories of Supply



### Categories

- You should classify your organization against the Category Tree, to indicate the categories of supply your organisation provides.
- Your Classification may be used as the basis for a formal Supplier Qualification called Category Assessment.

### Access Category Tree

- Category classification may be completed during or after the Registration process.
1. To access the Category Tree post registration, browse to **My Organization**, then click **My Categories**.
  2. Click **Add Category** to view the Category Tree.

## Select Categories of Supply, Continued (1)

The screenshot shows a two-step process in a web application. In the first step, a category tree is displayed with '10101500 - Livestock' selected. The interface includes buttons for 'Display Selected Only', 'Expand All', and 'Collapse All'. In the second step, a 'Free Text Search' box contains the word 'writing'. The search results show a new category tree where '44121700 - Writing Instruments' is selected. A 'Confirm Current Selection' button is highlighted with a red arrow, and a 'Cancel' button is also visible.

### Search and Select Categories

1. Use the **Free Text Search** feature and enter a keyword or Category code, then click **Search**.
2. The tree will refresh and display all matching Categories.
3. Each Category has levels of subcategories. You can use the **'Display Selected Only'**, **'Expand All'** and **'Collapse All'** buttons to control the display of subcategories in the tree.
4. Tick the box to select your Category, then click **'Confirm Current Selection'**
5. Depending on the category selected you may be required to complete additional category specific forms.

## Select Categories of Supply, Continued (2)

The screenshot displays a procurement system interface. At the top, a 'Categories' dropdown menu is expanded, showing a hierarchy: '14000000 - Paper Materials and Products' (with a descriptive text box) and '14110000 - Paper products'. Under '14110000', four sub-categories are listed: '14111500 - Printing and writing paper' (highlighted in yellow), '14111600 - Novelty paper', '14111700 - Personal paper products', and '14111800 - Business use papers'. Below the categories, a 'Project Details' section is visible, containing a 'Published Opportunity' button and a table of project information. The table includes fields for Project Code (tender\_4224), Project Title (Supply and Delivery of Plain Paper), Project Reference, Project with Multiple Lots (No), Project Type (Goods), and Project Categories (14111500 - Printing and writing paper, 14111800 - Business use papers, 14122200 - Specialty industrial use papers). The 'Project Categories' field is highlighted with a red rounded rectangle.

**Categories**

- 14000000 - Paper Materials and Products  
This segment includes paper used for commercial printing, forms, envelopes, reprographics, and tablets as well as value-added papers which feature special surface treatments, color, chemicals, or fiber content that meet specific needs.
- 14110000 - Paper products
  - 14111500 - Printing and writing paper
  - 14111600 - Novelty paper
  - 14111700 - Personal paper products
  - 14111800 - Business use papers

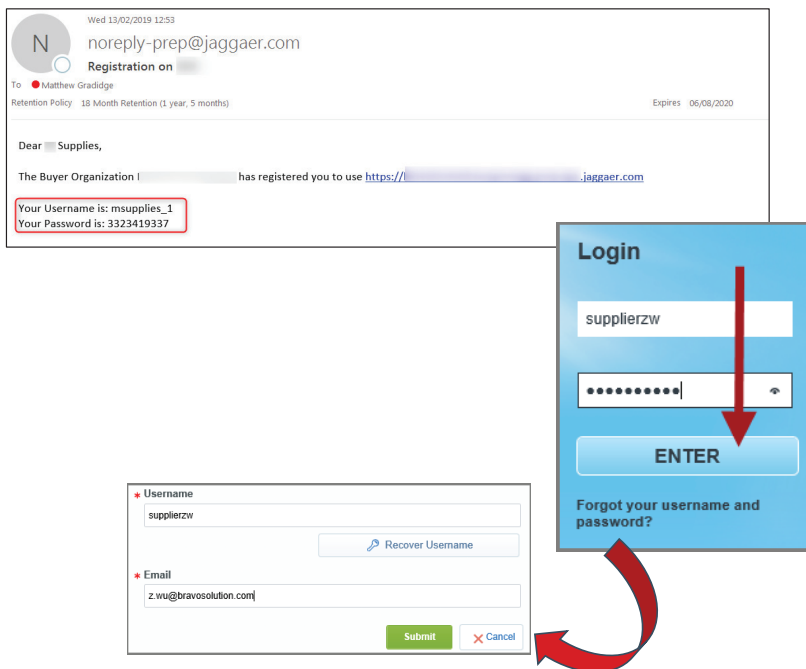
**Project Details**

Published Opportunity

<b>Project Code</b> tender_4224	<b>Project Title</b> Supply and Delivery of Plain Paper
<b>Project Reference</b>	<b>Project with Multiple Lots</b> No
<b>Project Type</b> Goods	<b>Project Categories</b> 14111500 - Printing and writing paper 14111800 - Business use papers 14122200 - Specialty industrial use papers

- It's very important to classify your organisation in the most relevant categories and in as many categories as possible, to ensure that you never miss a chance to participate in sourcing events!
- You may be alerted to new sourcing opportunities based on your category selections.

# Login as a Supplier



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## Login

- Click the link in the Registration Confirmation email to access the Login page.
- Log in with the Username and Temporary password, found in the email.
- As a security measure, you will be required to enter and confirm a new password.

## Forgot your Password?

- Click on the "**Forgot your username and password?**" link (text may be different on your platform)
- Fill in your username and email address.
- You will receive a temporary password via email.

## Login as Supplier – Forgot Username

Mon 18/02/2019 12:00  
noreply-prep@jaggaer.com  
Password Request for [REDACTED]

To Matthew Gradidge  
Retention Policy 18 Month Retention (1 year, 5 months) Expires 11/08/2020

Dear User,

You have requested a new Password to access [REDACTED] at [https://\[REDACTED\].prep.app.jaggaer.com](https://[REDACTED].prep.app.jaggaer.com)

The link below allows you to reset your Password. The link can be used only once and is valid for a limited time (it will expire in a few hours).

Click the following link to define a new password: <https://prep.app.jaggaer.com/esop/guest/login.do?qvu=6624195601690079D5BB>

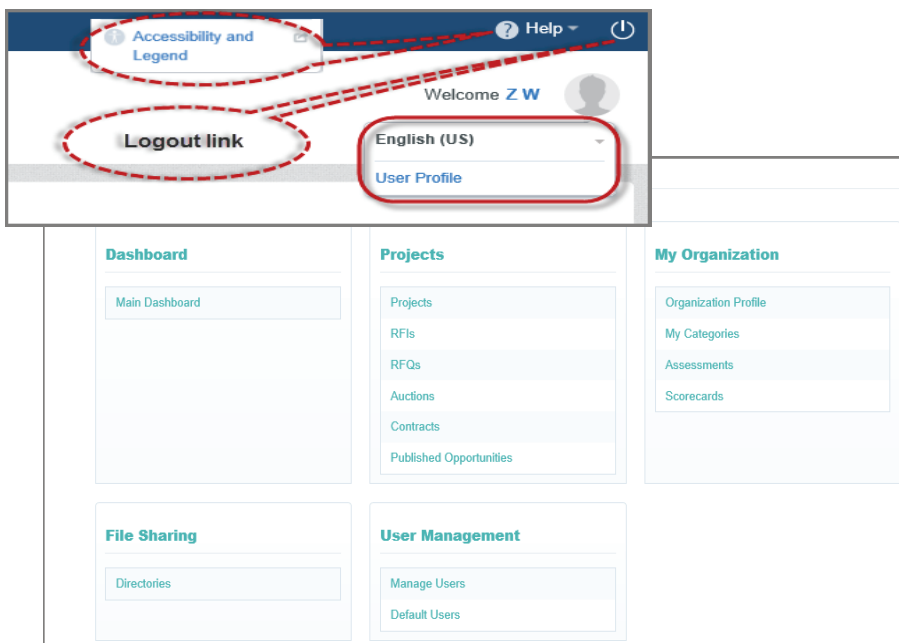
NOTE: If you did not request this Password reminder, please disregard this message. Nothing will happen to your account and you will be able to log in using your login credentials as usual.

### Forgot your Username?

- On the Login page, click **Forgot your username and password?** (text may vary)
- Click **Recover Username.**
- Fill in your email address and a validation value.
- You will receive an email with a link to access your Username.
- Please use the second link in the email to access your Username.
- The Username reminder link will expire after a few hours and can only be used once.



## Access the Supplier Home Page



The Supplier Home Page is usually the default page displayed after successful login.\*

### Universal Links

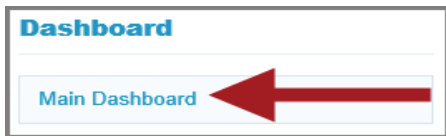
- On the upper right corner of the page, you can find links to Logout, and to view Accessibility guidance.
- You can also find links to access your User Profile to change your language, user details and/or password.

### Modules & Links

- The main area of the page displays links to the available modules, so you can use this page to reach any part of the platform.

\*On some platforms, the Dashboard may be the default page that is displayed after you login.

## Access the Dashboard



Auction Title	Buyer Organization	Start DateTime	End DateTime
Multi_Currency	Astor	07/07/2013 10:46 PM	07/09/2013 10:46 PM
Sugar_Auction_2013_John_Smith	Astor	07/07/2013 10:15 PM	07/10/2013 10:30 PM



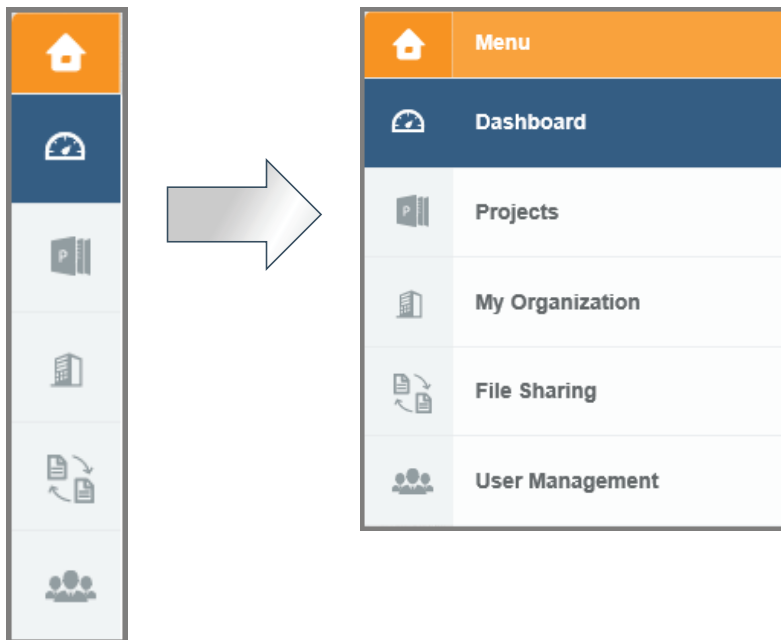
## Dashboard

- The Dashboard contains portlets that provide an overview of your sourcing activities and gives you access to them.

## Access Dashboard

- The Dashboard module can be accessed from the Supplier Home page, or by clicking the **Home** icon on the Navigation Menu.

## Access the Navigation Menu

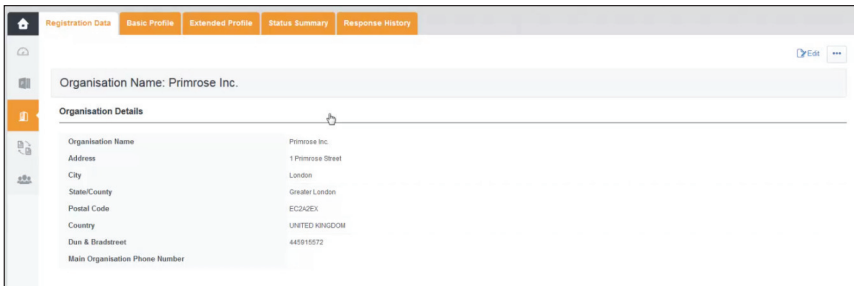
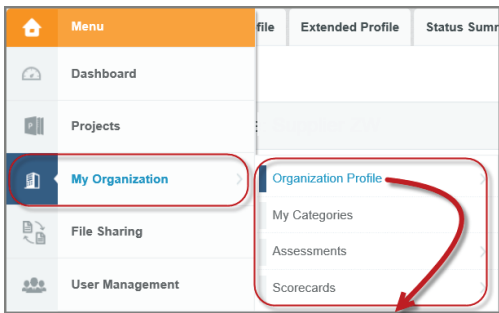


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### Access the Navigation Menu

- The navigation menu is located on the left side of each page.
- It allows you to move quickly from one module to another.
- To do so, click on a module to expand the menu and then select a link, to be directed to the section you want to access.

# Access My Organisation



## My Organization Module

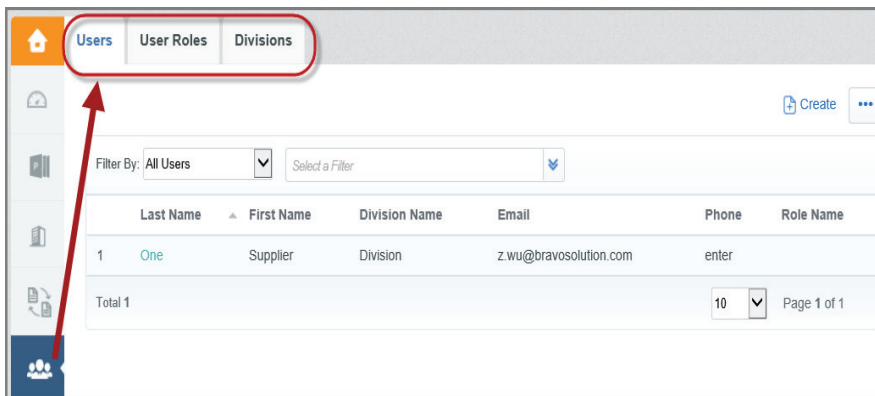
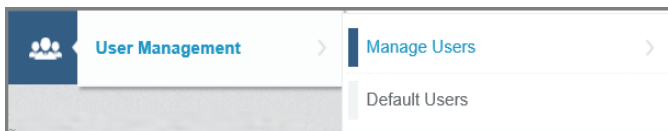
- In this module, you can view and manage your Registration data, Profile Forms, Category Classifications, Assessments and Scorecards.

## Access My Organization

- The module can be accessed from the Navigation Menu or the Supplier Home page.
  1. Click **Edit** to update information.
  2. Once the information is complete, click **Save**.

Note: Some Sourcing portals will not contain Extended Profile forms, Assessments or Scorecards.

## Access User Management



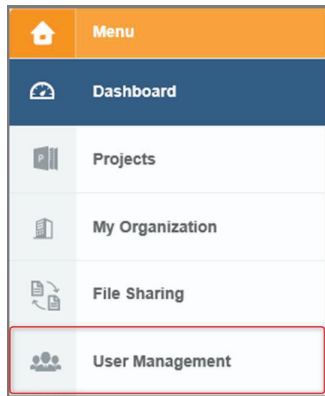
## User Management Module

- This module is available to users who are given the rights to manage users, roles and divisions within your organization.

## Access User Organization

- You can access the module from the Supplier Home page, or the Navigation Menu.

# Create User Roles

A screenshot of the 'New Role' form. The form has a yellow header with the text 'New Role'. Below the header are two buttons: 'Save' (green) and 'Cancel' (white with a red 'X'). A red arrow points from the 'Save' button to the right. The form is divided into sections: 'General Settings', 'Auctions', and 'RFIs / RFQs'. Under 'General Settings', there are fields for 'Role Name' (containing 'Commodity Manager'), 'Shared Role' (with a dropdown menu showing 'No' and 'Yes'), and a red dashed circle around the 'Yes' option with the text 'Selectable by all Divisions?'. Under 'Auctions', there are several rows of settings, each with a dropdown menu. Under 'RFIs / RFQs', there is one row with a dropdown menu.

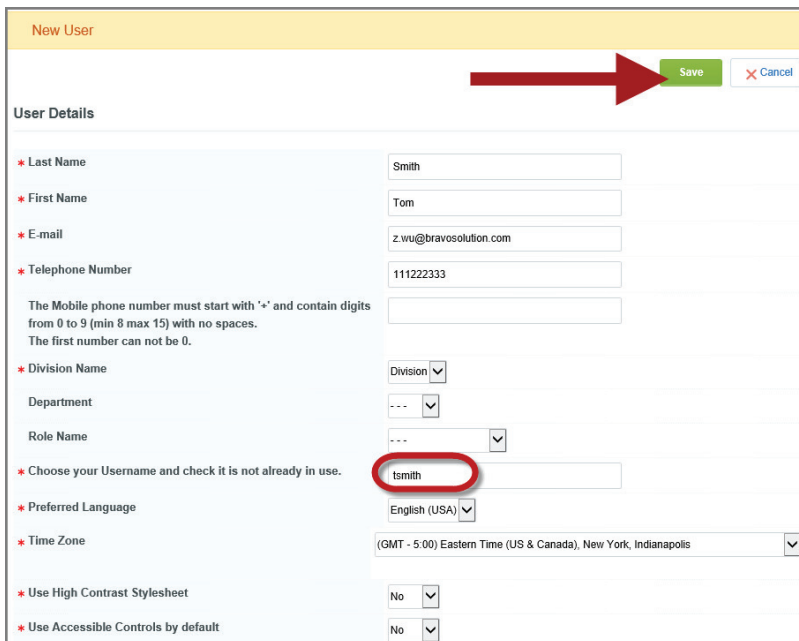
## User Roles

- Allow you to define a specific set of user rights to assign to users in your organisation. The rights for each user account can still be manually revised after the role assignment.

## Create User Role

1. Select **User Management, Manage Users, User Roles** from the Navigation Menu.
2. Click '**Create**' to turn the page into edit mode.
3. Give the User Role a name. It has to be unique. Decide whether if it's a shared role that is visible and selectable by all divisions.
4. Amend user rights.
5. Once complete, click '**Save**' to create the new User Role.

# Create New Users



**New User**

**User Details**

- \* Last Name: Smith
- \* First Name: Tom
- \* E-mail: z.wu@bravesolution.com
- \* Telephone Number: 111222333
- The Mobile phone number must start with '+' and contain digits from 0 to 9 (min 8 max 15) with no spaces. The first number can not be 0.
- \* Division Name: Division
- Department: ---
- Role Name: ---
- \* Choose your Username and check it is not already in use. **tsmith**
- \* Preferred Language: English (USA)
- \* Time Zone: (GMT - 5:00) Eastern Time (US & Canada), New York, Indianapolis
- \* Use High Contrast Stylesheet: No
- \* Use Accessible Controls by default: No

**Save** **Cancel**

## Create New User Accounts

1. Select **User Management, Manage Users, Users** from the Navigation menu.
2. Click '**Create**' and enter the details for the new account.
3. Complete all mandatory fields and choose a username that will be memorable to the new user, e.g. a combo of first initial and last name.
4. It is recommended that you use a similar naming convention for all usernames.
5. Click **Save** to create the new user account.

Note: If User Roles were not created, you will need to assign user rights.

- By default, new users are not assigned any rights.

## Access Projects and Sourcing Activities

The screenshot displays the Jaggaer system's navigation menu and a list of RFQs. The menu on the left includes 'Dashboard', 'Projects', 'My Organization', 'File Sharing', and 'User Management'. The 'Projects' menu item is highlighted with a red box, and its sub-menu is also highlighted with a red box, showing options for 'Projects', 'RFIs', 'RFQs', 'Auctions', 'Contracts', and 'Published Opportunities'. Below the menu, a table lists RFQs with columns for RFQ Code, RFQ Title, Project Code, RFQ Status, RFQ Closing Date/Time, Buyer Organization, and Response Status.

	RFQ Code	RFQ Title	Project Code	RFQ Status	RFQ Closing Date/Time	Buyer Organization	Response Status
1	rfq_5498	Test Super Envelope RFQ ZW	tender_3384	Closed: To Be Evaluated	03/15/2016 12:00 AM	Astor Training	Response Submitted To Buyer
2	rfq_5497	Test Super Envelope RFQ	tender_3384	Closed: To Be Evaluated	03/14/2016 04:19 PM	Astor Training	Response Submitted To Buyer

### Projects Module

- Projects are containers for sourcing events such as PQQ/RFIs & ITT/RFQs, Auctions and Contracts.

### Access Projects

- You can access Projects and sourcing events via the Navigation Menu, Supplier Home page, or the Quick Links on the Dashboard.

# Get Help – Global Customer Care



**Need help with registration, navigation, or technical issues?**

Please send an email to the Technical Helpdesk at:

0800 069 8632

[help\\_uk@jaggaer.com](mailto:help_uk@jaggaer.com)