

JAGGAER ADVANTAGE

SUPPLIER USER HANDBOOK

PRODUCT VERSION 20.2



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SUPPLIERS

REGISTRATION & ONBOARDING

New suppliers must register on the platform to be considered for sourcing events. Suppliers can be activated immediately or conditionally after the registration process.

In case of conditional activation, suppliers must pass the initial onboarding process (completing all mandatory questions in basic profile forms) in order to access the platform and view sourcing events.

Register as a Supplier (Self-Registration)

Step-by-Step

1. On the application login page, click **Register**. The Registration Data page opens.
2. Complete the registration form with your organization's details and contact information for the main procurement professional within your organization.
 - Mandatory fields are marked with a red asterisk.
 - Ensure the email address is correct in order to receive the registration confirmation email
 - To register multiple email addresses, use a semicolon to separate them.
3. Click **Save**. You may receive a registration confirmation email, depending on buyer configuration. You may also receive a verification code in your email for completing the process.

Profile Form

Your profile collects the important information about your organization. It is important to complete your profile and keep it up to date.


- It contains profile forms that may be used to determine your platform access and supplier status.
- Information accumulates as you interact with the buyer organization.
- Your responses to profile questions will pre-populate in sourcing events when the questions are used in events.
- Your updated response to profile questions in sourcing events and supplier value management objects (eg. Assessments and Scorecard Survey processes) are saved back to your profile.

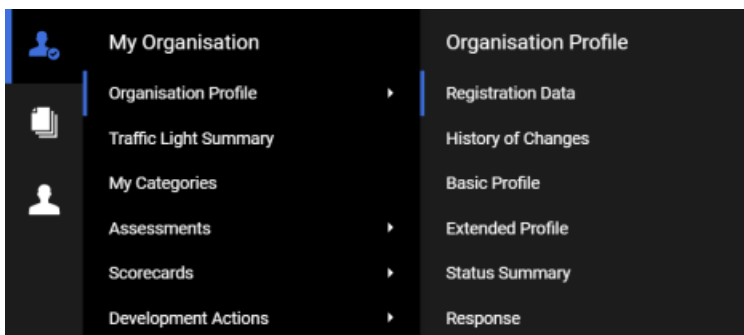
Complete Basic Profile Form

After registering, and depending on configuration, you may be directed to one or multiple basic supplier profile forms to provide additional information related to your company.

Complete the basic profile form or forms. You must complete this information to be considered for activation. You should update your profile as needed to ensure the most up-to-date information is available in the system.

Once the basic form is complete, click **Save & Continue** to proceed with the onboarding process. Once you have completed the basic profile form, you will be emailed a temporary password. Use the user name you entered during registration and the temporary password to log in for the first time. Enter a new password when prompted.


Note: After you are registered (supplier is active), you should update your Profile as needed to ensure the most current information is available in the system. You can navigate to your profile by accessing **My Organization**  **> Organization Profile > Registration Data** on the navigation menu.



Complete Extended Profile Form

Step-by-Step

Extended Profile Forms are available to you after you have successfully registered and logged into the platform.

1. Navigate to **My Organization**  **> Organization Profile > Extended Profile**. In the Extended Profile section, the completion status will be displayed under Supplier Data Status. The percentages indicate the completion status of Mandatory and Optional Questions in each form.
2. Click the **Title** to view the form content.
3. Click **Edit** to switch the form to edit mode.
4. Enter responses for all the mandatory questions (red asterisk). It is recommended to answer optional questions, so the buyer has as much information about your organization as possible. Non-editable questions are answered by buyers or provided by an external system.
5. Click **Save and Continue** to save your responses and move to the next form, if applicable.

Login

Login

Step-by-Step

1. Click the link in the registration confirmation email or go to the platform URL to access the login page.
2. Log in with the username and temporary password found in the email.
3. Enter and confirm a new password.

Forgot your password?

Step-by-Step

1. Click on the **Forgot your username and password?** link (text may be different on your platform).
2. Fill in your username and email address.
3. You will receive an email with a link to reset your password.

Forgot your username?

Step-by-Step

1. On the login page, click **Forgot your username and password?**
2. Click **Recover Username**.
3. Enter your email address and validation value.
4. You will receive an email with a link to access your username.

ORGANIZATION PROFILE

To view organization profile information, navigate to **My Organization**  > **Organization Profile**, then select the page you would like to view.

View Organization Profile

- **Registration Data** - Contains a record of the organization details you entered when registering as a supplier. Click the Edit button to change any of the available fields.

- **History of Changes** - Contains a record of the changes made to registration data and primary supplier status (eg. supplier activation).
- **Basic Profile** - Contains a record of the basic profile information you entered when registering (before activation). Click the title of each section to view the details of that section. You can also click the Edit button on the details page of any section to edit the available fields.
- **Extended Profile** - Contains a record of the extended profile information you entered when registering (after activation). Click the title of each section to view the details of that section. You can also click the Edit button on the details page of any section to edit the available fields.
- **Status Summary** - Contains information related to the completeness of your registration and organization status.
- **Response History** - Contains the history of the values answered for each question.

FILE SHARING

With the File Sharing solution, buyers may choose to allow read-only access to files that have been made available to the supplier organization.

View Shared Files

To view shared files, navigate to **File Sharing**  > **Directories**, then select one of the following:

- **List of Directories** - This page lists the shared file directories you have access to.
- **Search** - This page provides advanced search functionality for searching for files shared with you.

