Supplier Onboarding – Domestic Company

Indiana University (IU) is a member of the Jaggaer supplier network. To receive payment from IU, payees, referred to as “suppliers” in Jaggaer, must complete the supplier onboarding process and join the network. Once established, your supplier portal is used to manage payment information, addresses, tax forms, and more.

The Jaggaer portal is not accessible on mobile devices such as smartphones or tablets. It must be accessed from a desktop computer.

This document provides a step-by-step walkthrough of the supplier onboarding process for a US-taxed Company.

Before you follow the steps in this document, locate the following items:

- Indiana University supplier invitation email.
- Direct deposit (ACH) banking information.
- Scanned image of completed and signed W-9 tax form.

Already started the process and need to pick up where you left off? Click here.

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Invitation

The onboarding process begins when an IU staff member requests your addition to the supplier network. IU Purchasing reviews the request, and, once approved, invites you to begin the onboarding process via email. This email invitation will come from the email address buyiu.noreply@iu.edu, have a sender name of “Indiana University,” and will look like the example below.

Click Register Now to establish your username and password.

You will also receive reminder emails from Jaggaer directly. These messages come from support@sciquest.com and contain contact information for Jaggaer’s support team.

Please contact the IU department you are working with for assistance first before contacting Jaggaer.
Create Your JAGGAER Network Account

After clicking Register Now in the email invitation, the registration page opens in a browser window. Click the drop-down in the upper right-hand corner to select a language, if desired, then Continue with Registration to proceed.

Fields marked with a star are required. Verify your first and last name and enter your phone number in the appropriate field. Update your time zone if needed.
Proceed to the **Your Login** section of the page. Confirm your email address and establish a password.

Your email address acts as your username when accessing the supplier portal. Store your username and password in a safe place! You will need this information to login to the portal and make changes in the future.

Answer the Account Recovery Question and click **Create Account** to establish your account.

Upon creating your account you will automatically be transferred the supplier portal.

**Complete and Submit Registration Information**

The supplier registration page is made up a series of sections, visible in the left-hand menu. Each section is followed by a checkmark. Completed sections are represented by green checkmarks. Sections with gray checkmarks require additional information.
Throughout the registration process you will see fields marked with a star. These fields are required and must be satisfied to complete your registration. All other fields are optional.

Welcome
On the Welcome page, enter the company name in the appropriate fields then click **Next**.

You are not required to complete the supplier onboarding process in one sitting. At any time, click **Save Progress** to save your work and return later.

Company Overview
In the Company Overview section, fill in the **Country of Origin, DUNS number (if applicable), Legal Structure, Tax ID Number, and Legal Structure Sub-Classification**.
Next, select your legal structure from the Legal Structure drop-down menu.

Enter your Employee Identification Number in the Tax ID Number field. Click Save Changes to save your work and Next to complete the Individual Overview section.

The left-hand menu updates to reflect a green checkmark once the section is complete.
Business Details

This area is mainly comprised of optional information about the company. The only required information is **Commodity Codes**.

You can search keywords to locate the company commodity area. You can also manually search through the provided list.

**Helpful Search Tip:** Use simple keywords such as “food”, “equipment”, “books”.

Click Edit. A new window will open with a search box.
Click the commodity code that best describes your business area.

Click **Done** to Continue.
Click **Next** to continue.

**Addresses**

We require three types of addresses: Fulfillment, Physical, and Remittance. If there is only one address for all of these types, it must be entered three times.

Click **Add Address**

A new window will appear.
Add a title for this address. Check the corresponding boxes for this address.

Click Next

Reminder: fields marked with a star are required. All other fields are optional.

Complete all relevant and required fields.

This is where you indicate how you want purchase order distributed: email or fax.
Click Next

A new screen will appear.

Enter a company contact. If you click Not Applicable, you will be required to enter a contact on the next screen.

Click Save Changes

The Address and Contact sections are now complete.
Click Next

Contacts

Contacts receive notifications related to orders established with IU. You are required to have one contact on file to satisfy this section of the registration process.

If you added a contact when adding another address this section will already be complete.

Click Add Contact

Enter contact information relevant to the company.

Reminder: fields marked with a star are required. All other fields are optional.

Click Save Changes to save the contact to your profile.
Repeat these steps as many times as desired to add additional contacts to your profile. Click **Next** to continue to the Payment Information section.

Click **Next**

**Diversity**

Click **Add Diversity Classification**, even if you are not certified as a diverse supplier.
A new window will appear. Select the diversity classification as it relates to the company.

Selecting a classification will require you to upload supporting documents.

Click **Done**

Upload any requested documents.

Click **Next**

**Insurance**

Certain services may require liability insurance. Check with your customer if you are unsure.

If insurance is needed, click **Add Insurance** and upload supporting documents.

If insurance is not required, click **Next**
Payment Information

US-taxed companies may elect to receive payment via direct deposit, also known as ACH, or paper check. In either case, click Add Payment Information and select your preferred method of payment. Paper checks will be mailed to the remit address entered earlier in the registration process. Wire Transfer payments are reserved for foreign payments.

Payment via Direct Deposit (ACH)

Select Direct Deposit (ACH) from the drop-down menu. A new window opens where you can enter your banking information.
Reminder: fields marked with a star are required. All other fields are optional.

**Electronic Remittance Email** field (Required): Enter an email address in this field to receive a notification when a payment is made using this banking information.

Next, enter your bank account information in the **Bank Account** section. Click the **What is this?** link for help locating your routing and account numbers.

Routing and account numbers are not the same as debit or credit card numbers.

Click **Save Changes** to save your work.
Payment via Check

Select **Check** from the drop-down menu. A new window opens to collect additional payment details.

**Reminder:** fields marked with a star are required. All other fields are optional.

If you wish to receive an email notification when payment is issued via this method, enter your email address in the **Electronic Remittance Email** field. Click **Save Changes** to save your work.
Once payment information is entered, click **Next**.

Tax Information

A completed and signed W-9 tax form is required to complete registration. Click **Add Tax Document** and select **W-9**.

Enter a name for the tax form in the **Tax Document Name** field and select the year the form was signed from the **Tax Document Year** drop-down menu.

If you already have a completed tax document on hand, click **Select file** to upload the document.
If you do not have a completed W-9 form saved to your computer, click Download Pre-populated Tax Document. Jaggaer generates a W-9 tax form which contains information previously entered during the registration process.

Print the tax form, sign and date, and scan the document. The signed document can then be uploaded by clicking Select file. Alternatively, you may sign the document with a digital signature, such as AdobeSign.

The tax form MUST be signed to satisfy this requirement. Please double check and verify the form is signed and complete prior to uploading.

Once uploaded, click Save Changes to upload the document to your profile.
Enter the date the form was signed in the **Tax Form Signature Date** field. You may also select the date using the calendar widget to the right of the field.

Click **Save Changes** to save your progress and **Next** or **Proceed to Certify and Submit** to continue.

**Supplier Information**

This section is optional for **Shipping Terms**
Click Proceed to Certify and Submit

Certify & Submit

Finally, verify your name, title, and email address in the appropriate fields. Prior to submission, you can review or update a section by selecting it from the left-hand menu.

Once you are satisfied that the information you have entered is correct, check the box next to Certification and click Submit.

After submission, you will see a confirmation screen like the one below.
Additionally, you will receive an email confirming your submission.

Supplier Registration Complete for Indiana University

Dear The Sampson Project,

Thank you for completing your JAGGAER registration profile. Your information has been submitted to Indiana University TEST SITE and is awaiting review. The IU Supplier Workgroup will contact you with any questions they may have.

As a reminder, you can log into your secure account by visiting Indiana University TEST SITE's Customer Portal Login Link.

In the meantime, we encourage you to review our For Suppliers page for additional information regarding the features of your new portal, including invoice submission and payment tracking. You may login to your portal at any time by visiting the JAGGAER Customer Portal page.

Please contact the IU Supplier Workgroup with any questions by emailing or calling (812) 855-5720, option 1.

Thank You,

Indiana University
Registration Approval

IU Purchasing will review your information and contact you if any additional information is needed. Communication will be sent via email from the address buyiu.noreply@iu.edu or helpmeiu@iu.edu

Once your registration is approved, you will receive a confirmation email like the one below. This message will come from support@sciquest.com. This confirmation notice may take up to 48 hours to be delivered.

Congratulations! You are now a member of the Jaggaer supplier network and may receive payments from IU.
Continue Registration

Access your supplier registration by logging in on the Jaggaer supplier portal. Once logged in, click Indiana University in the Customer Portal Access section.

If it’s the first time you’re accessing your portal after your initial login, a pop-up window will appear notifying you that you are leaving the Jaggaer portal and continuing to the Indiana University portal.

Check the box next to Don’t show me this again and click OK to dismiss the message and continue.
In the IU portal, click **Manage Registration Profile** to continue completing the registration process.

Select a section from the left-hand menu to continue registering. Sections marked with a green checkmark are complete. Gray checkmarks represent sections which require additional information.