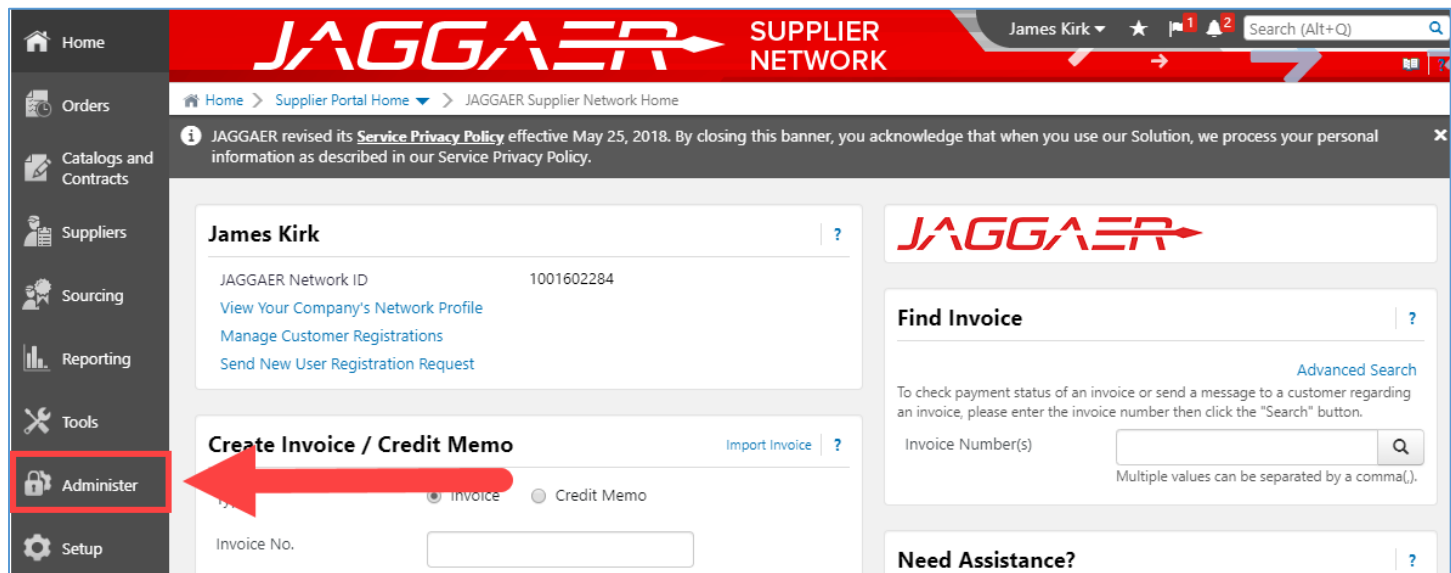


# Delegate Supplier Portal Access

Every supplier, whether they are a company or an individual, can delegate access to their portal. These requests must be initiated by the Primary Contact, generally the individual who completed the supplier registration process. If you do not know who the Primary Contact is for your company, or who else has access to your supplier portal, [contact Jaggaer support](#) to recover this information.

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

You must have access to the Administer module in the supplier portal, highlighted below, to complete the steps outlined in this document. If you completed the supplier onboarding process you will have access to this module.

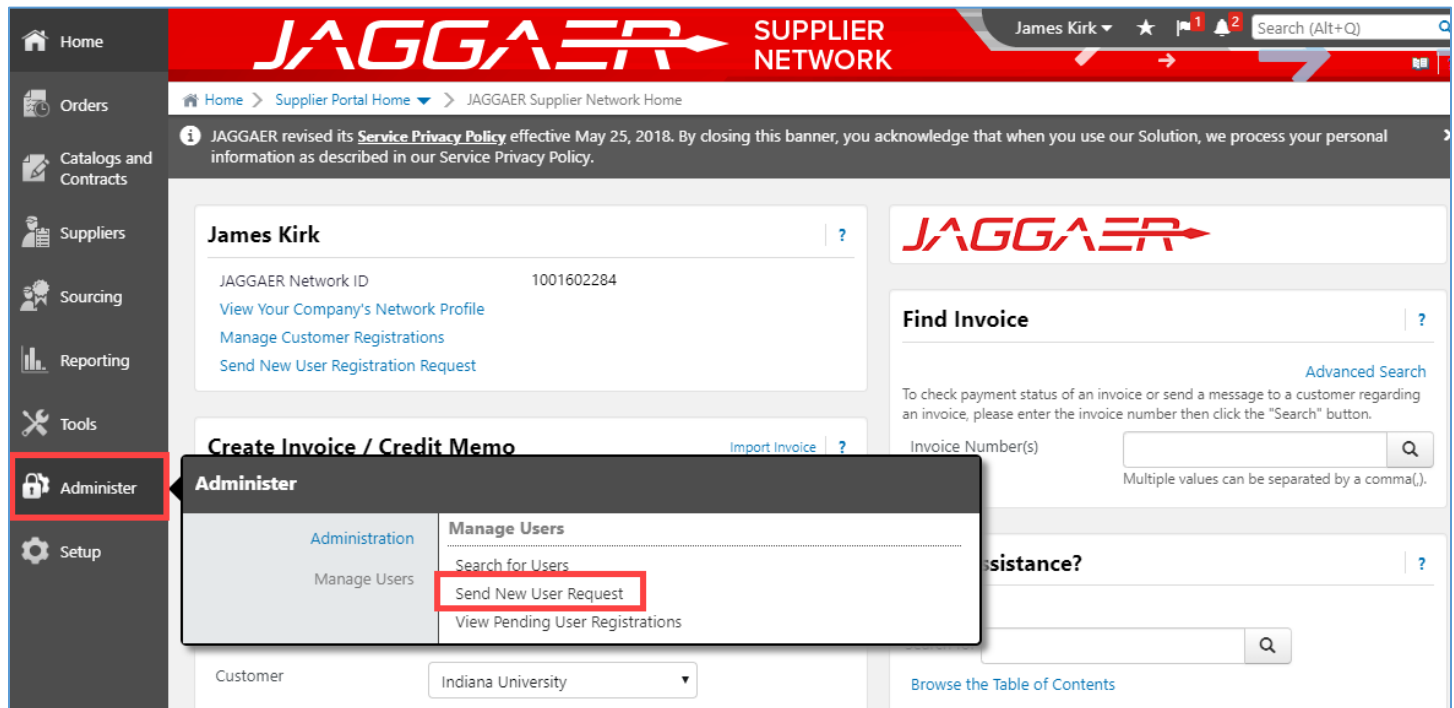


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## Request a New User

[Login to your Jaggaer supplier portal](#). Once logged in, navigate to the **Administer** module in the left-hand menu. Here, select **Send New User Request**.

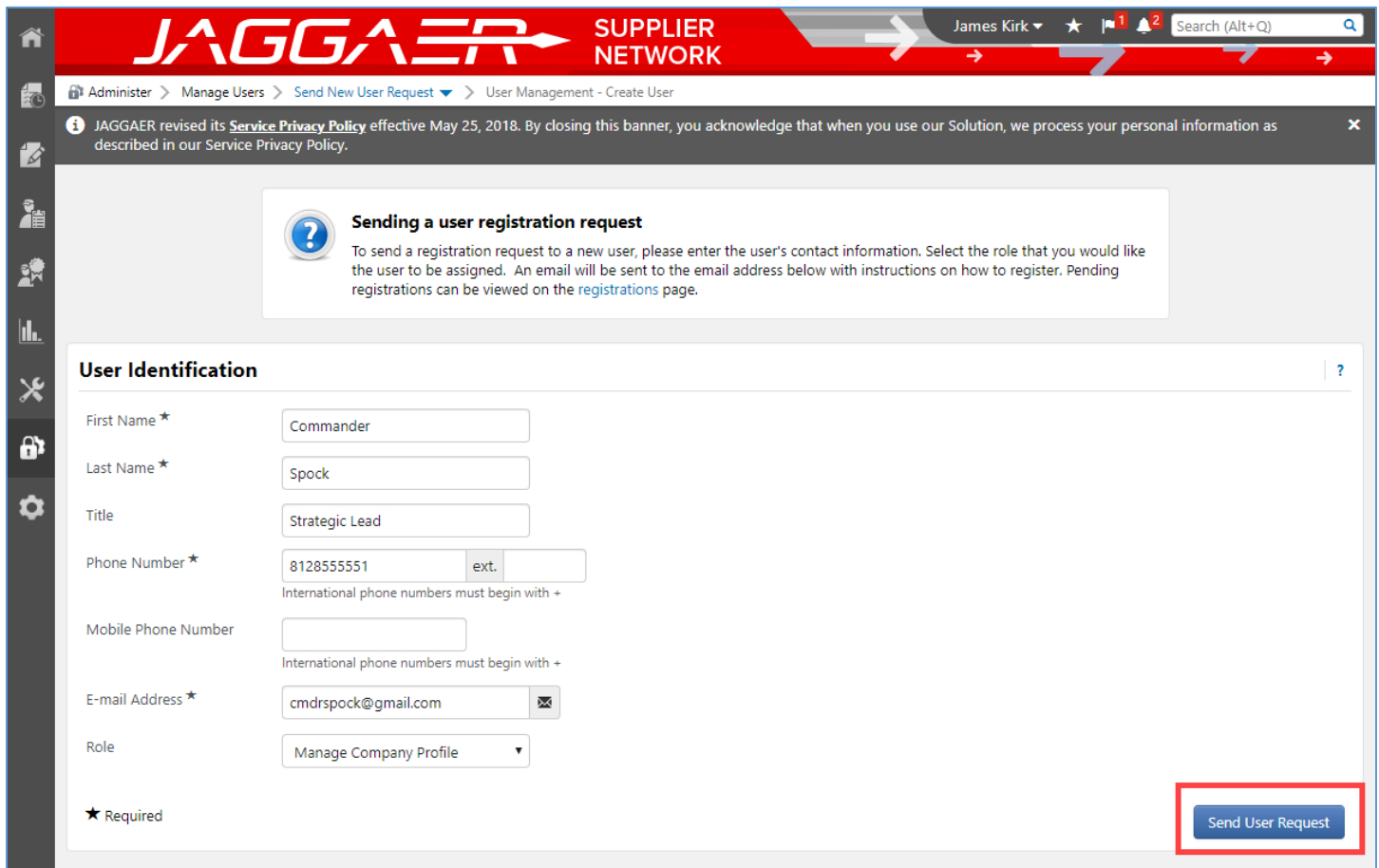


Enter the contact information for the individual you wish to grant access to your portal. You may assign one **Role** to the user; additional roles may be added later. The table below describes the permissions associated with each role.

Note that the permissions described below apply to **every** customer portal you have established in the Jaggaer network, not just Indiana University!

Role	Permissions
Manage All Portal Activities	Grants user full access to the supplier portal and all editable fields. Individual may create new users, update profile information, manage contracts, etc.
Manage Bid Opportunities	Individual can respond to sourcing events and event-related questions, such as bid questions or project specifications.
Manage Company Profile	Allows the individual to edit supplier profile information, including tax forms and banking information.
Manage Content / Pricing	Used by catalog suppliers. Allows the user to update/add catalog items and pricing.
Manage Contracts	Allows users to view and manage contracts customers have shared in the portal.
Manage Orders / Invoices	Individual can view and create Sales Invoices/Credit Memos and review and close Sales Orders.
Support Customer Questions	Able to view and edit their own supplier profile and respond to customer questions.
View Reports Only	User can view and edit their own profile and access supplier portal reports but has no edit or creation permissions.

Click **Send User Request** to submit your request.



**JAGGAER SUPPLIER NETWORK**

James Kirk | Search (Alt+Q)

Administer > Manage Users > Send New User Request > User Management - Create User

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**?** **Sending a user registration request**

To send a registration request to a new user, please enter the user's contact information. Select the role that you would like the user to be assigned. An email will be sent to the email address below with instructions on how to register. Pending registrations can be viewed on the [registrations](#) page.

**User Identification**

First Name \*

Last Name \*

Title

Phone Number \*   International phone numbers must begin with +

Mobile Phone Number  International phone numbers must begin with +

E-mail Address \*

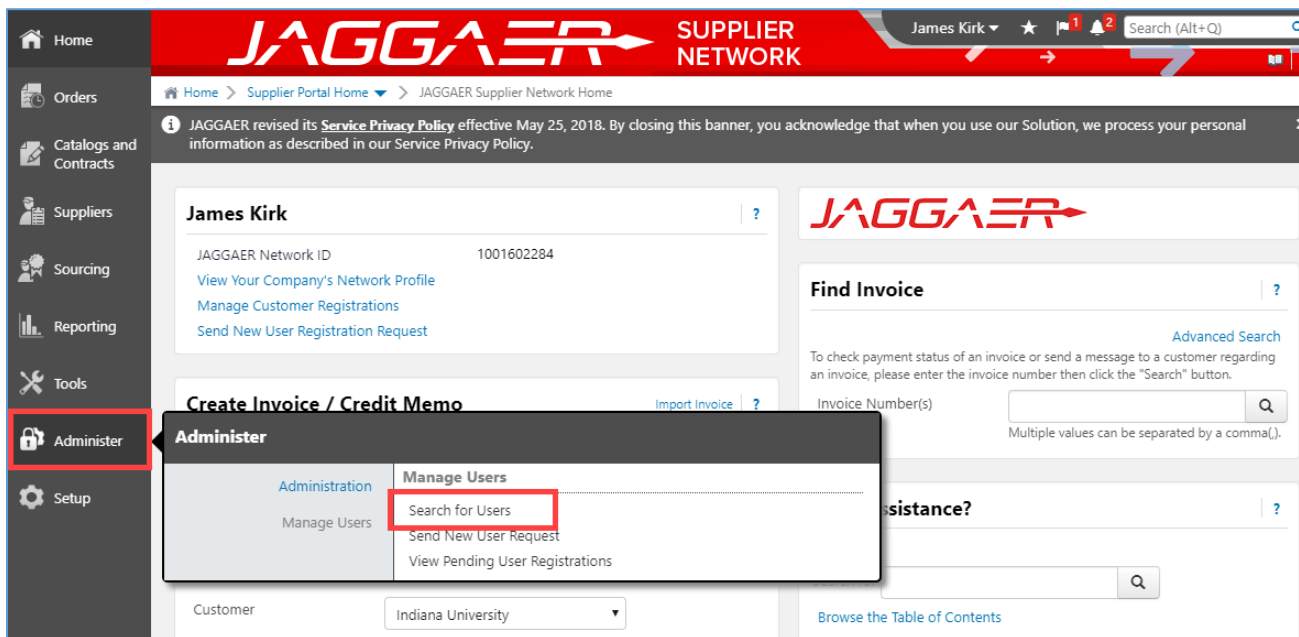
Role

★ Required

The new user receives an invitation via email to the address you specified. Once they have responded to the access request, they will have the Role you defined. [This document describes how to respond to the request.](#)

### Monitoring Request Progress

Review a list of all users and their statuses by visiting **Search for Users**, available in the **Administer** module.



**JAGGAER SUPPLIER NETWORK**

James Kirk | Search (Alt+Q)

Home > Supplier Portal Home > JAGGAER Supplier Network Home

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**James Kirk**

JAGGAER Network ID 1001602284

[View Your Company's Network Profile](#)

[Manage Customer Registrations](#)

[Send New User Registration Request](#)

**Find Invoice**

Advanced Search

To check payment status of an invoice or send a message to a customer regarding an invoice, please enter the invoice number then click the "Search" button.

Invoice Number(s)

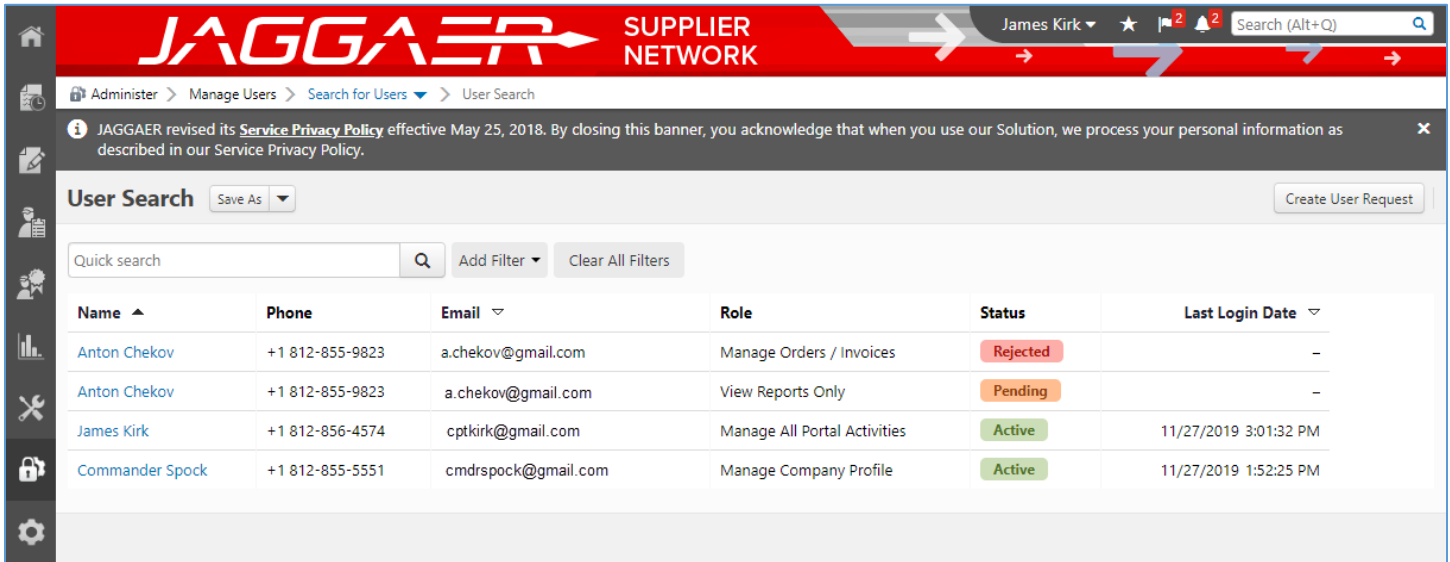
Multiple values can be separated by a comma(,).

**Administer**

- Administration
  - Manage Users
    - Search for Users**
    - Send New User Request
    - View Pending User Registrations

Customer

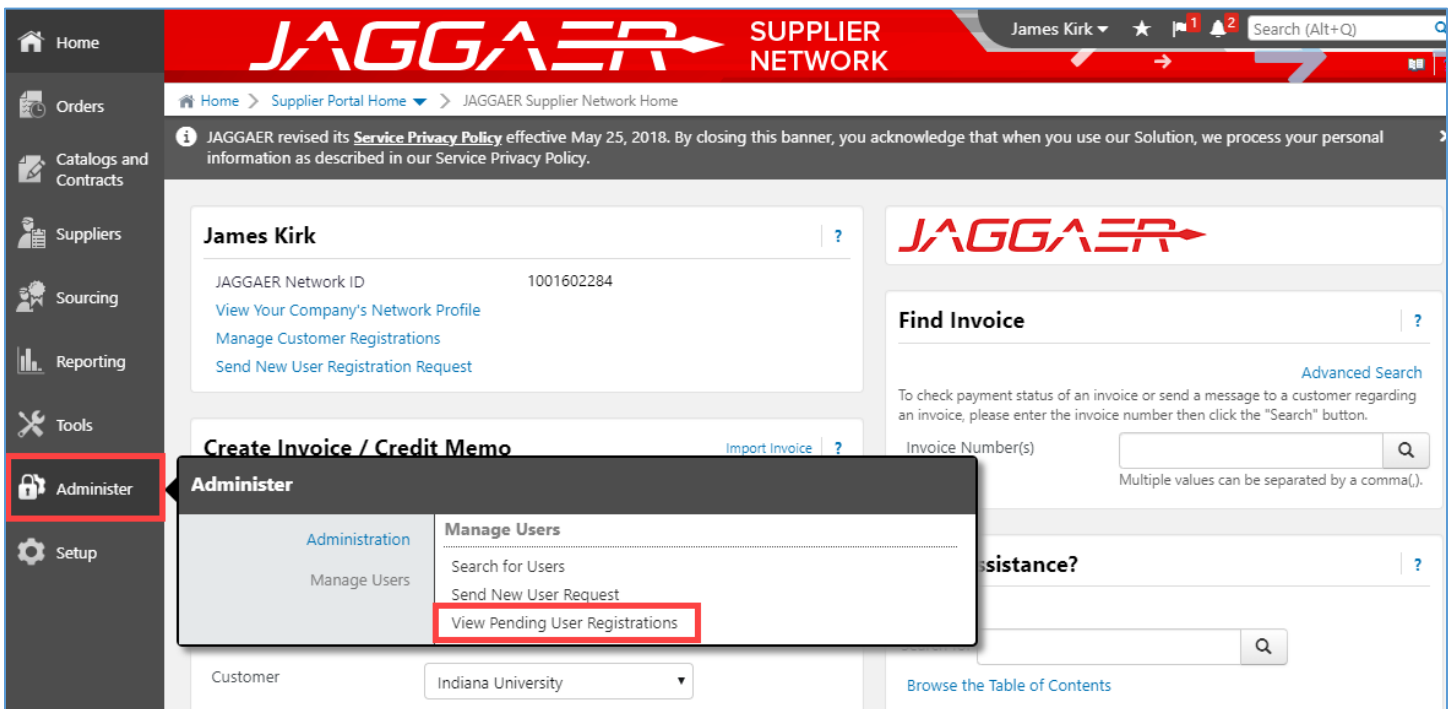
Jaggaer returns a list of all users you have requested.



Name	Phone	Email	Role	Status	Last Login Date
Anton Chekov	+1 812-855-9823	a.chekov@gmail.com	Manage Orders / Invoices	Rejected	-
Anton Chekov	+1 812-855-9823	a.chekov@gmail.com	View Reports Only	Pending	-
James Kirk	+1 812-856-4574	cptkirk@gmail.com	Manage All Portal Activities	Active	11/27/2019 3:01:32 PM
Commander Spock	+1 812-855-5551	cmdrspock@gmail.com	Manage Company Profile	Active	11/27/2019 1:52:25 PM

### Resend or Reject a Request

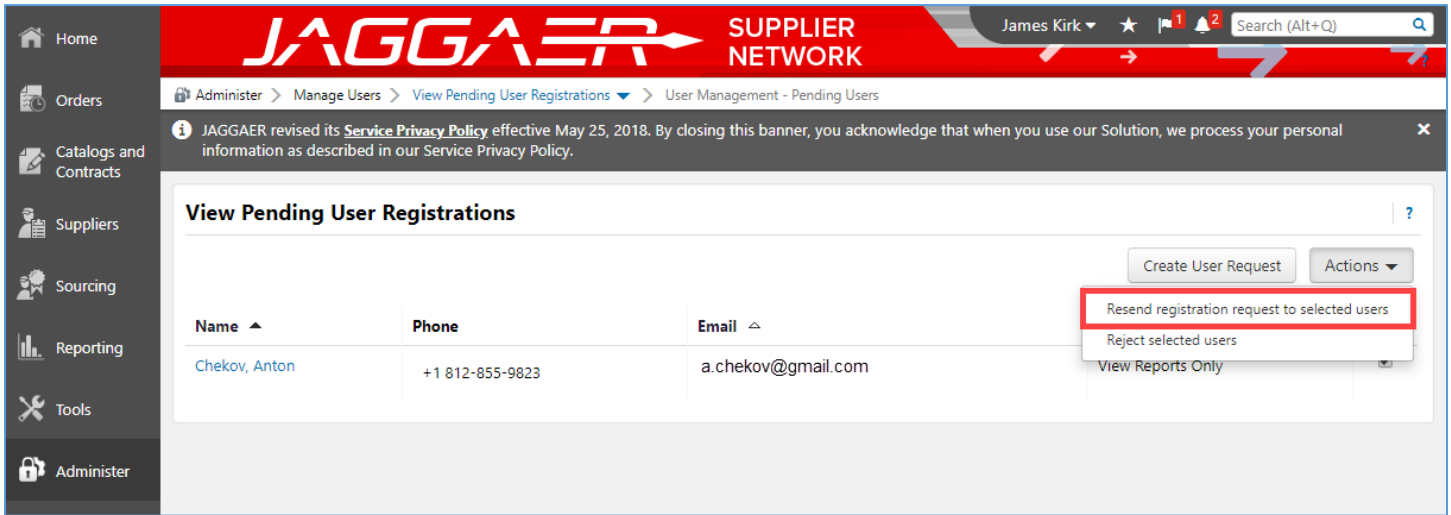
Resend or Reject an access request by visiting the **View Pending User Registrations** area of the **Administer** module.



The screenshot shows the 'Administer' module interface. The left sidebar has 'Administer' highlighted. A dropdown menu is open, showing the following options:

- Administration
- Manage Users
- Search for Users
- Send New User Request
- View Pending User Registrations** (highlighted with a red box)

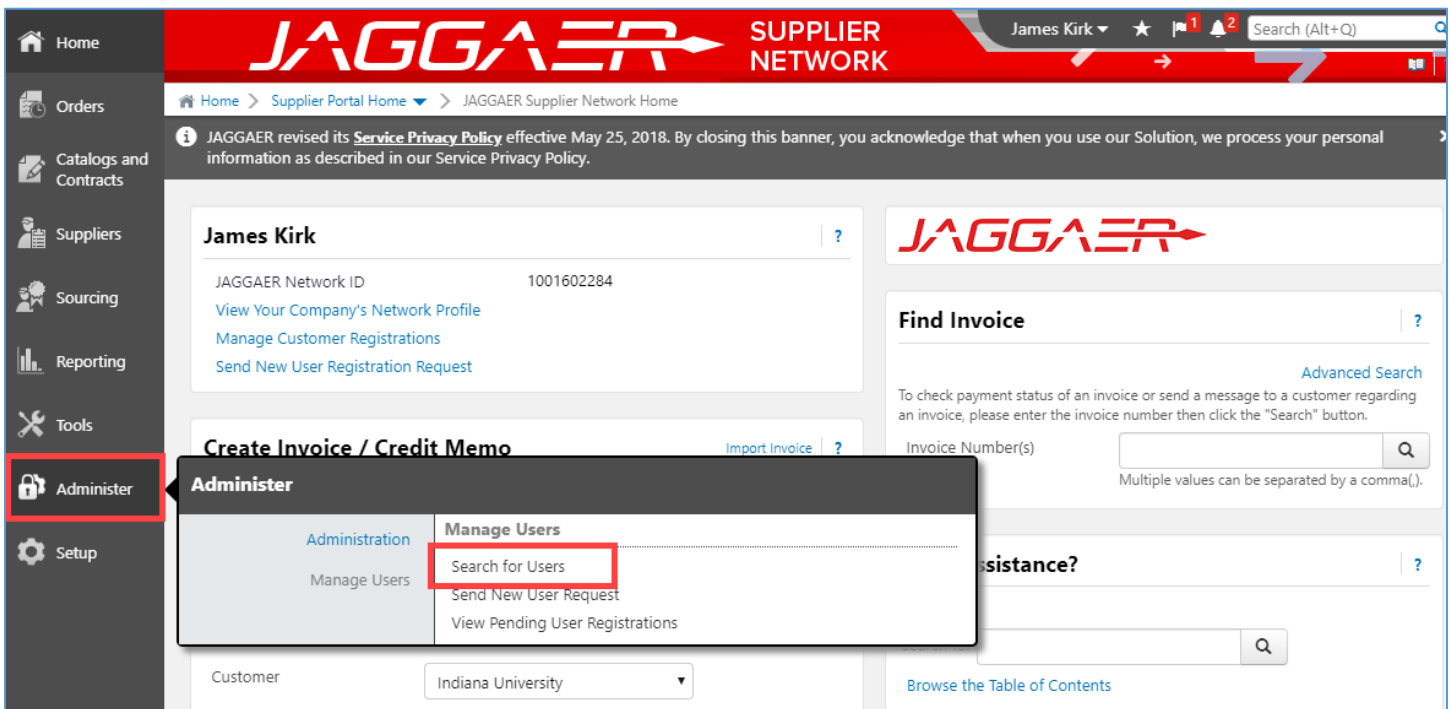
Users shown in this area have not completed the step necessary to access the supplier portal. Resend an invitation by **checking the box** next to their name and choosing **Resend registration request to selected users** from the **Action** drop-down menu.



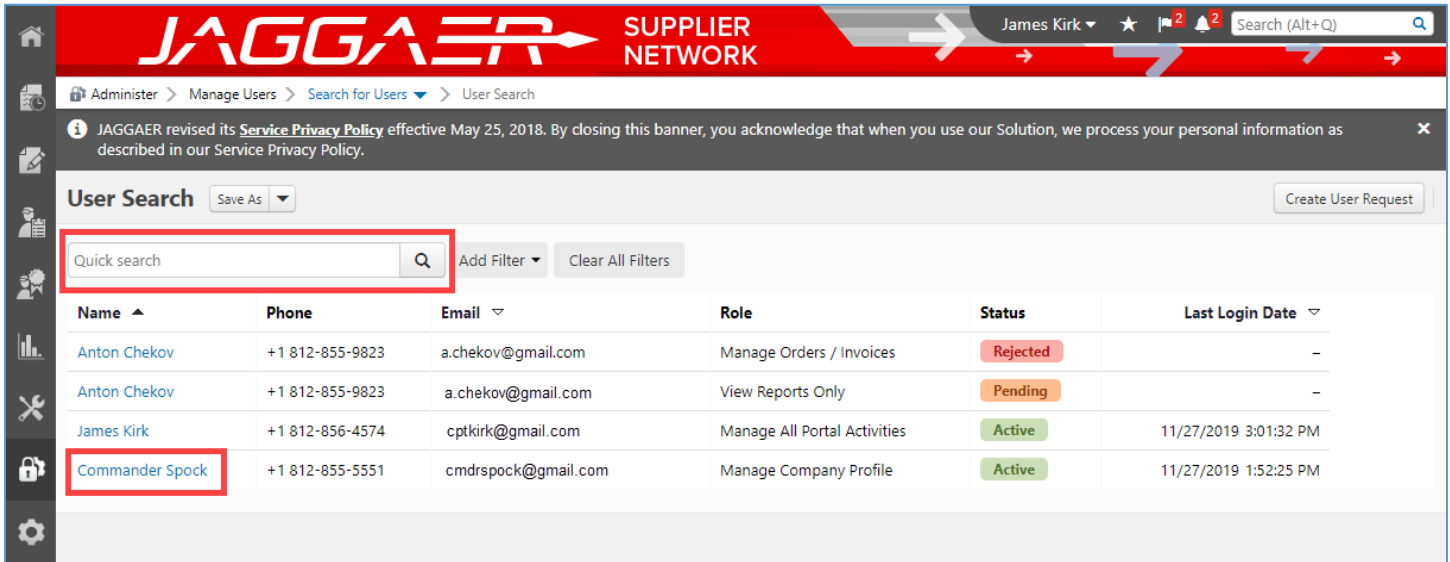
You may also cancel user requests from this area by selecting **Reject selected users**.

## Change User Permissions

Edit an established user's permissions by first locating them in Jaggaer. A list of current users is available by accessing **Search for Users**, part of the **Administer** module.



Here, enter the individual's name in the **search field** at the top of the page or select their name from the list.



**JAGGAER SUPPLIER NETWORK**

James Kirk | Search (Alt+Q)

Administer > Manage Users > Search for Users > User Search

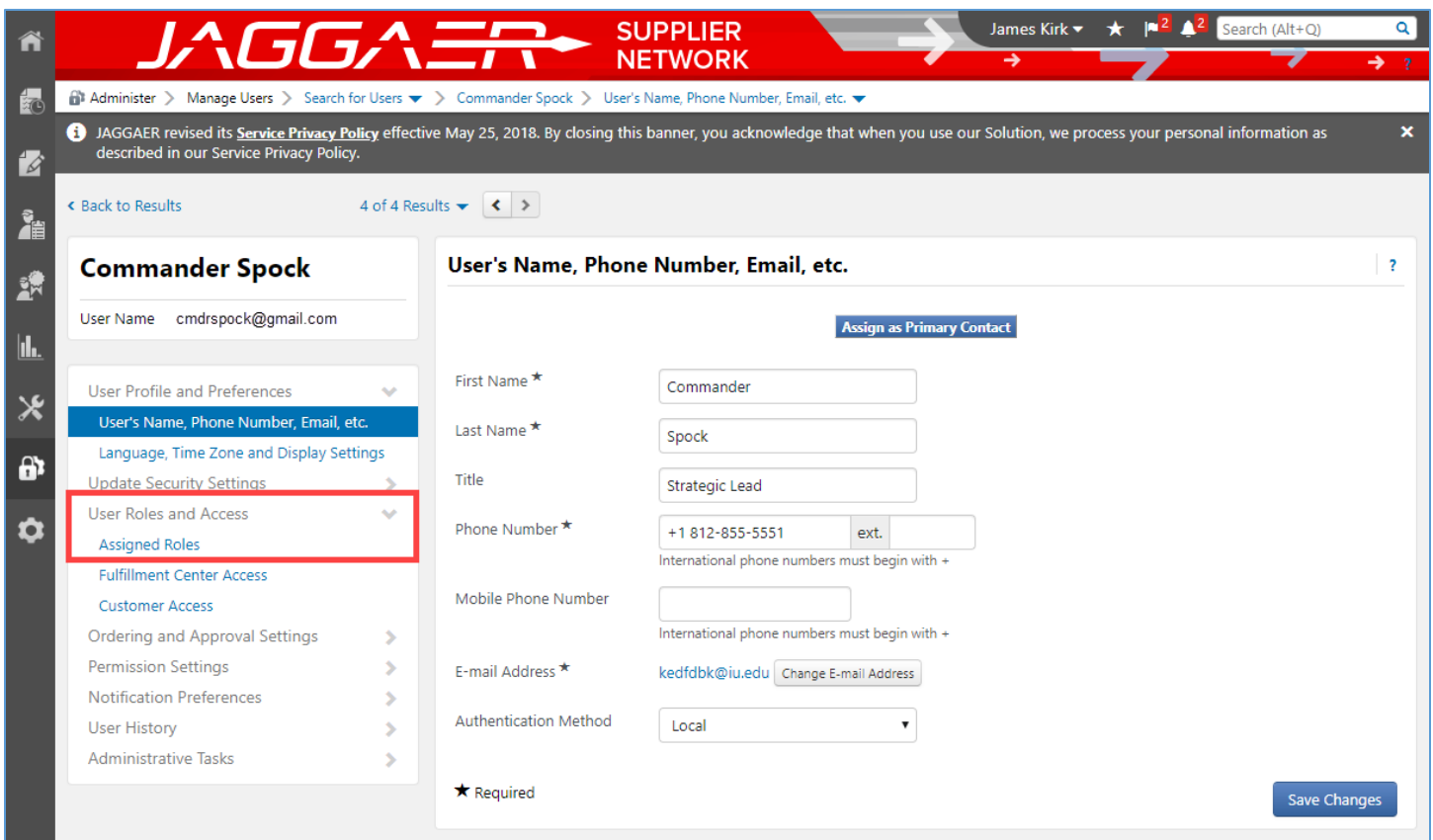
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**User Search** Save As Create User Request

Quick search Add Filter Clear All Filters

Name	Phone	Email	Role	Status	Last Login Date
Anton Chekov	+1 812-855-9823	a.chekov@gmail.com	Manage Orders / Invoices	Rejected	-
Anton Chekov	+1 812-855-9823	a.chekov@gmail.com	View Reports Only	Pending	-
James Kirk	+1 812-856-4574	cptkirk@gmail.com	Manage All Portal Activities	Active	11/27/2019 3:01:32 PM
Commander Spock	+1 812-855-5551	cmdrspock@gmail.com	Manage Company Profile	Active	11/27/2019 1:52:25 PM

Next, click **User Roles and Access** in the left hand menu, then **Assigned Roles**.



**JAGGAER SUPPLIER NETWORK**

James Kirk | Search (Alt+Q)

Administer > Manage Users > Search for Users > Commander Spock > User's Name, Phone Number, Email, etc.

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< Back to Results 4 of 4 Results

**Commander Spock**

User Name cmdrspock@gmail.com

Assign as Primary Contact

User Profile and Preferences

**User's Name, Phone Number, Email, etc.**

Language, Time Zone and Display Settings

Update Security Settings

**User Roles and Access**

**Assigned Roles**

Fulfillment Center Access

Customer Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

Administrative Tasks

**User's Name, Phone Number, Email, etc.**

First Name \* Commander

Last Name \* Spock

Title Strategic Lead

Phone Number \* +1 812-855-5551 ext. International phone numbers must begin with +

Mobile Phone Number International phone numbers must begin with +

E-mail Address \* kedfdbk@iu.edu Change E-mail Address

Authentication Method Local

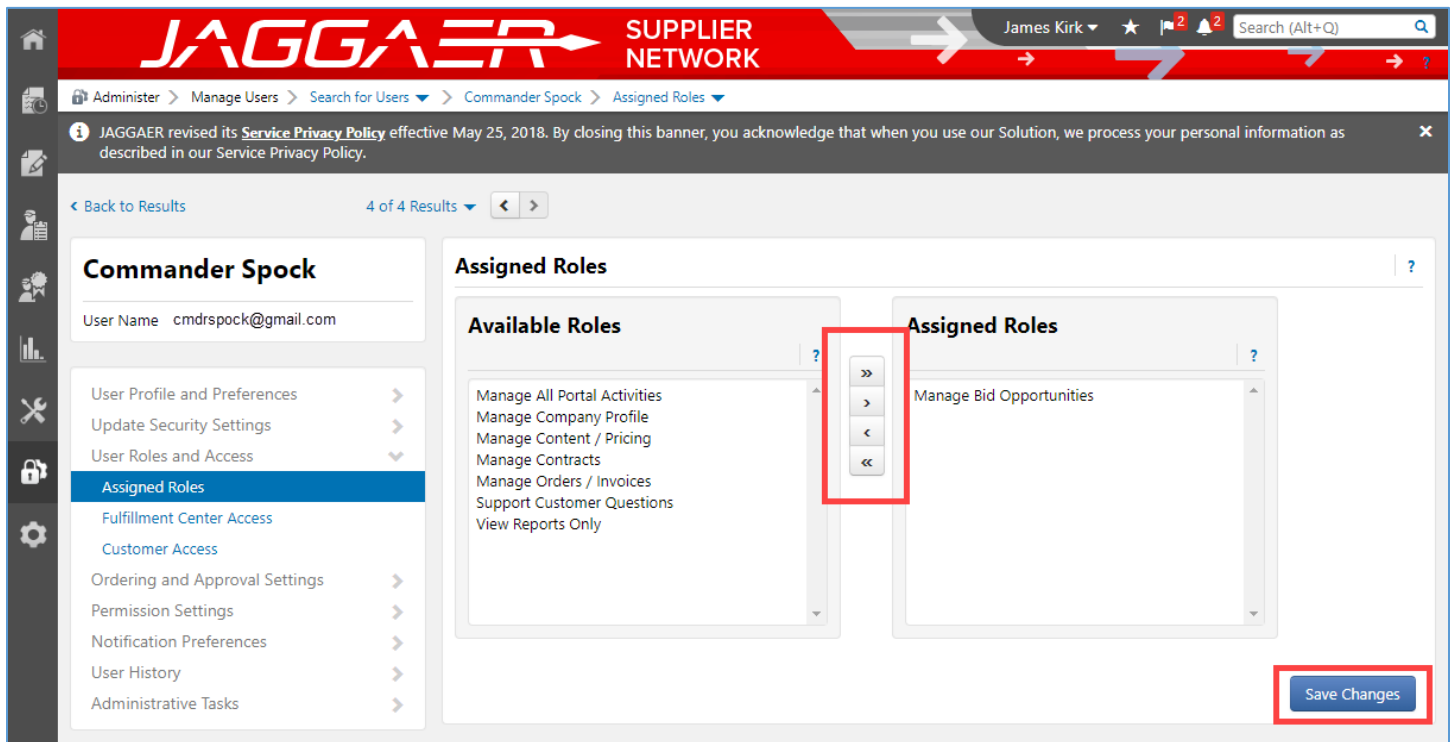
\* Required

Save Changes

The table below describes the permissions associated with each role.

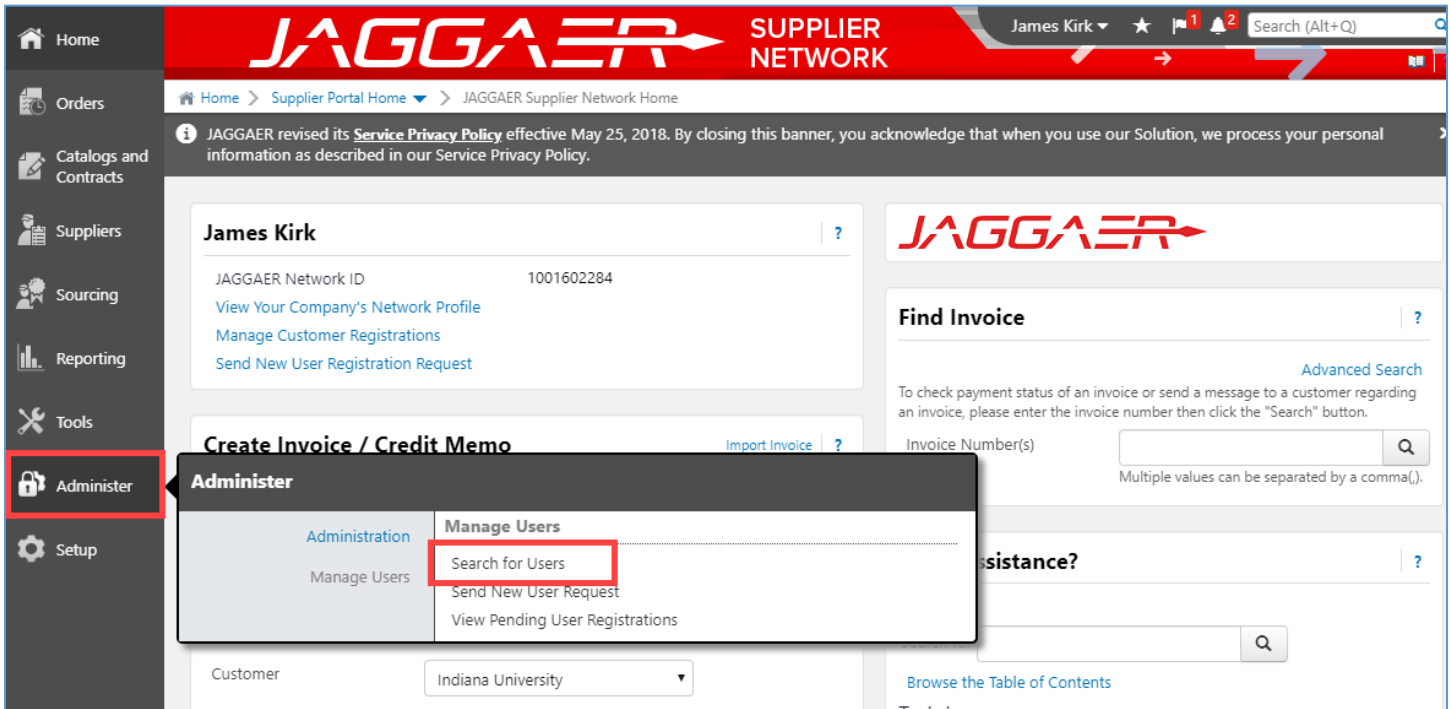
Role	Permissions
Manage All Portal Activities	Grants user full access to the supplier portal and all editable fields. Individual may create new users, update profile information, manage contracts, etc.
Manage Bid Opportunities	Individual can respond to sourcing events and event-related questions.
Manage Company Profile	Allows the individual to edit supplier profile information, including tax forms and banking information.
Manage Content / Pricing	Used by catalog suppliers. Allows the user to update/add catalog items and pricing.
Manage Contracts	Allows users to view and manage contracts customers have shared in the portal.
Manage Orders / Invoices	Individual can view and create Sales Invoices/Credit Memos and review and close Sales Orders.
Support Customer Questions	Able to view and edit their own profile and respond to customer questions.
View Reports Only	User can view and edit their own profile and access supplier portal reports but has no edit or creation permissions.

Select a role from the **Available Roles** or **Assigned Roles** column, then use the **arrows** in the center column to assign or unassign the role, respectively. Click **Save Changes** to update the user's permissions.



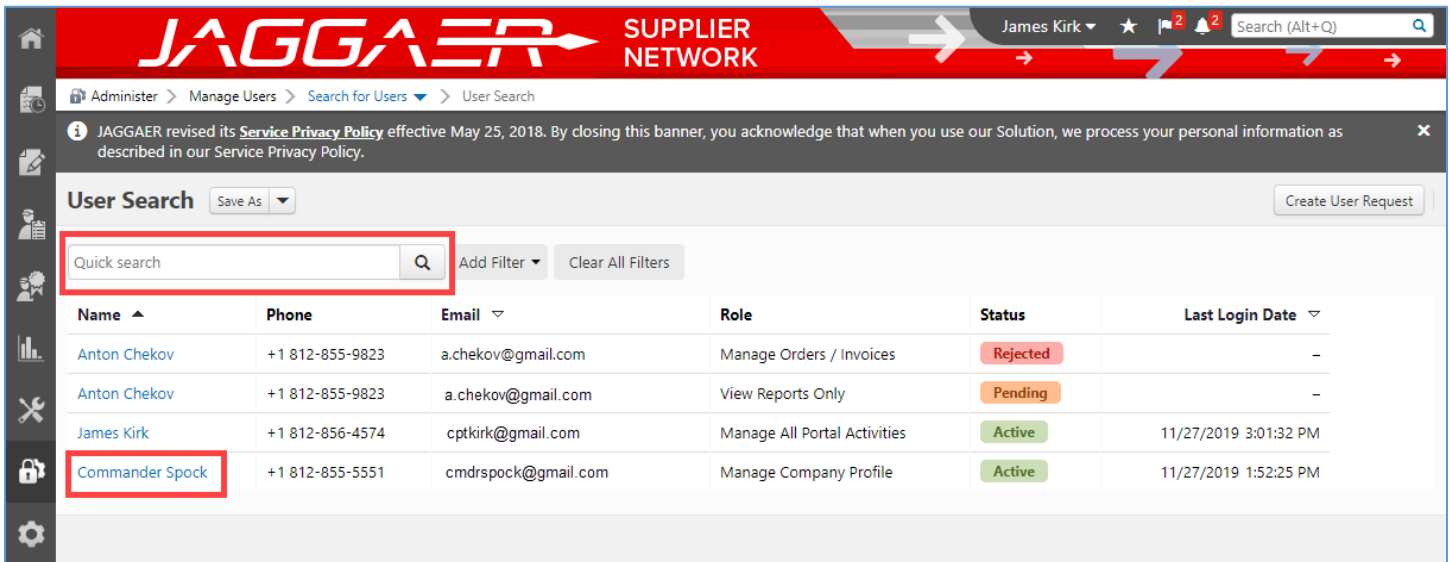
## Remove/Inactivate a User

You can completely remove a user's access to the supplier portal by inactivating their profile. First, locate them in Jaggaer by navigating to **Search for Users** in the **Administer** module.



The screenshot shows the JAGGAER Supplier Network interface. The left sidebar contains a navigation menu with 'Administer' highlighted in red. A dropdown menu for 'Administer' is open, showing 'Manage Users' with 'Search for Users' highlighted in red. The main content area shows the profile for 'James Kirk' with details like 'JAGGAER Network ID: 1001602284' and links for 'View Your Company's Network Profile', 'Manage Customer Registrations', and 'Send New User Registration Request'. There is also a 'Find Invoice' section and a 'Create Invoice / Credit Memo' section.

Search for the individual's name or select it from the returned results.

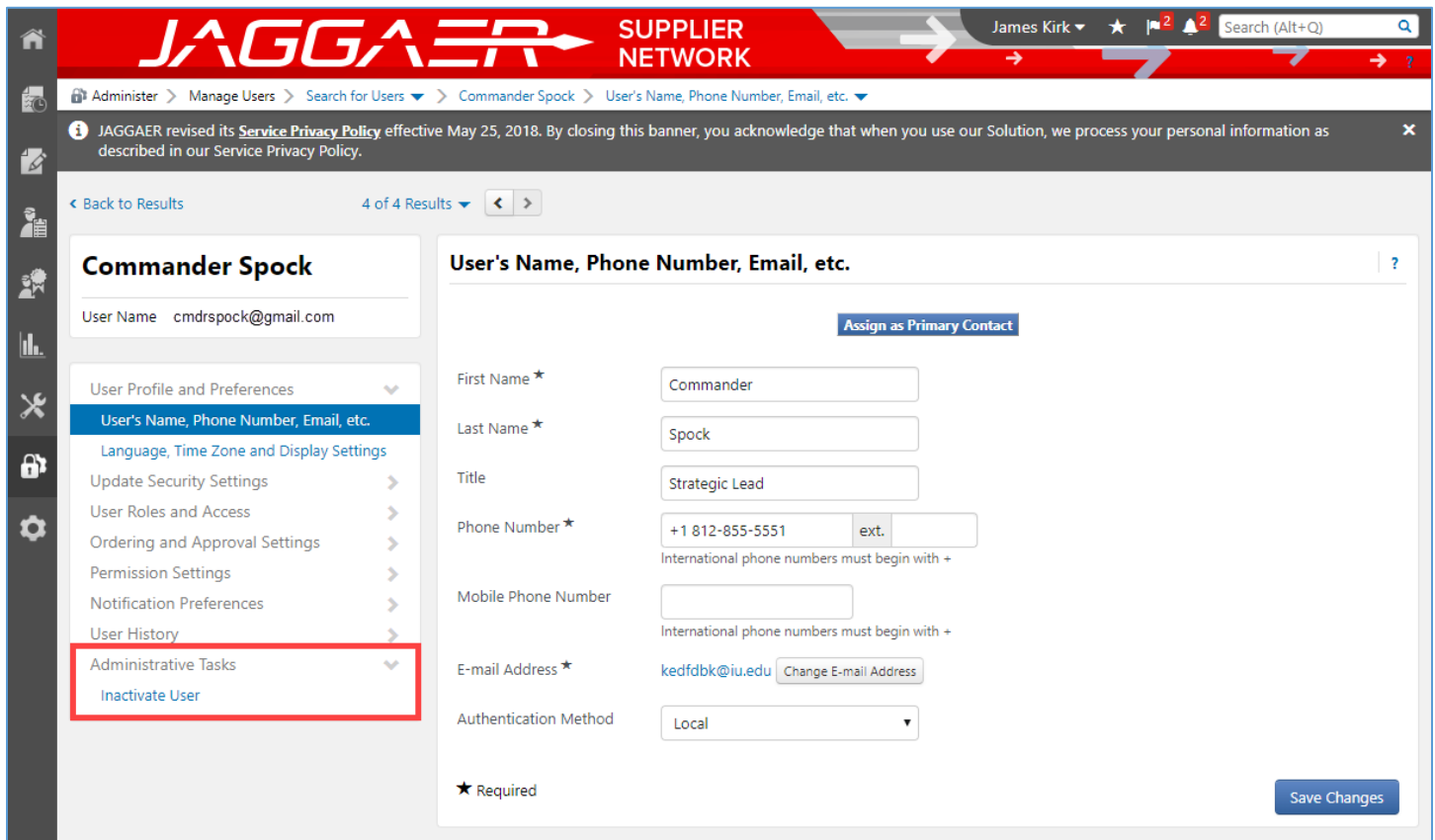


The screenshot shows the 'User Search' page in the JAGGAER Supplier Network. The breadcrumb trail is 'Administer > Manage Users > Search for Users > User Search'. A search bar is highlighted in red. Below the search bar is a table of search results:

Name	Phone	Email	Role	Status	Last Login Date
Anton Chekov	+1 812-855-9823	a.chekov@gmail.com	Manage Orders / Invoices	Rejected	-
Anton Chekov	+1 812-855-9823	a.chekov@gmail.com	View Reports Only	Pending	-
James Kirk	+1 812-856-4574	cptkirk@gmail.com	Manage All Portal Activities	Active	11/27/2019 3:01:32 PM
Commander Spock	+1 812-855-5551	cmdrspock@gmail.com	Manage Company Profile	Active	11/27/2019 1:52:25 PM

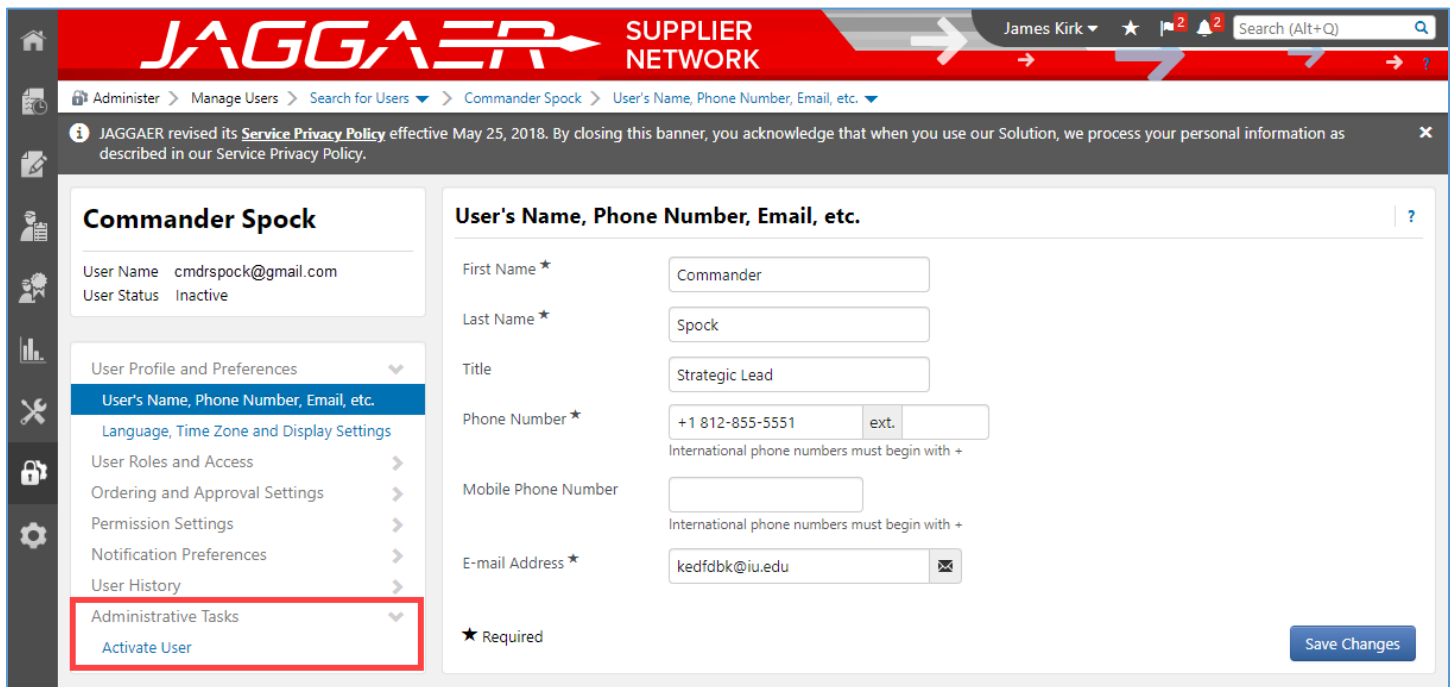


On their profile, navigate to **Administrative Tasks**, then **Inactivate User**.



The screenshot shows the user profile for 'Commander Spock' in the JAGGAER Supplier Network. The left-hand navigation menu is expanded to 'Administrative Tasks', where 'Inactivate User' is highlighted with a red box. The main content area shows the user's details, including name, phone numbers, and email address. A 'Save Changes' button is visible at the bottom right.

The user's record is inactivated automatically. You may reactivate their access at any time by following these same steps and instead choosing **Activate User**.



This screenshot shows the same user profile for 'Commander Spock', but now the user status is 'Inactive'. The 'Administrative Tasks' menu is expanded to 'Activate User', which is highlighted with a red box. The 'User Status' field in the profile summary now shows 'Inactive'. The 'Save Changes' button remains at the bottom right.