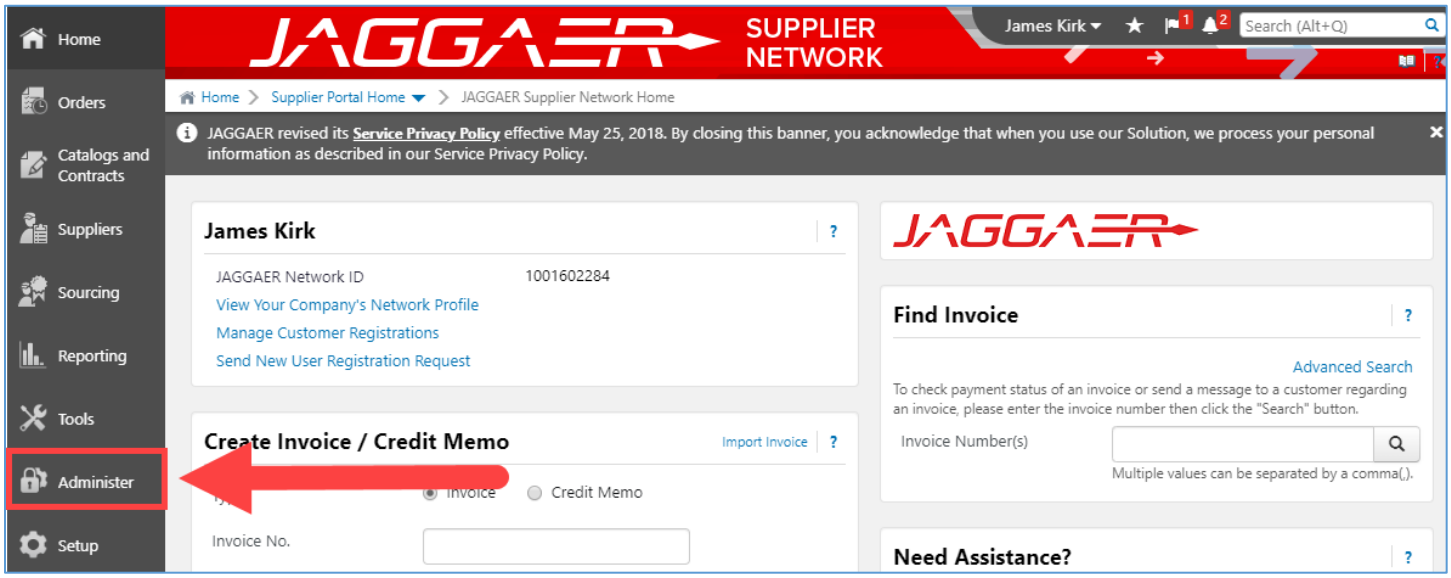
# Delegate Supplier Portal Access

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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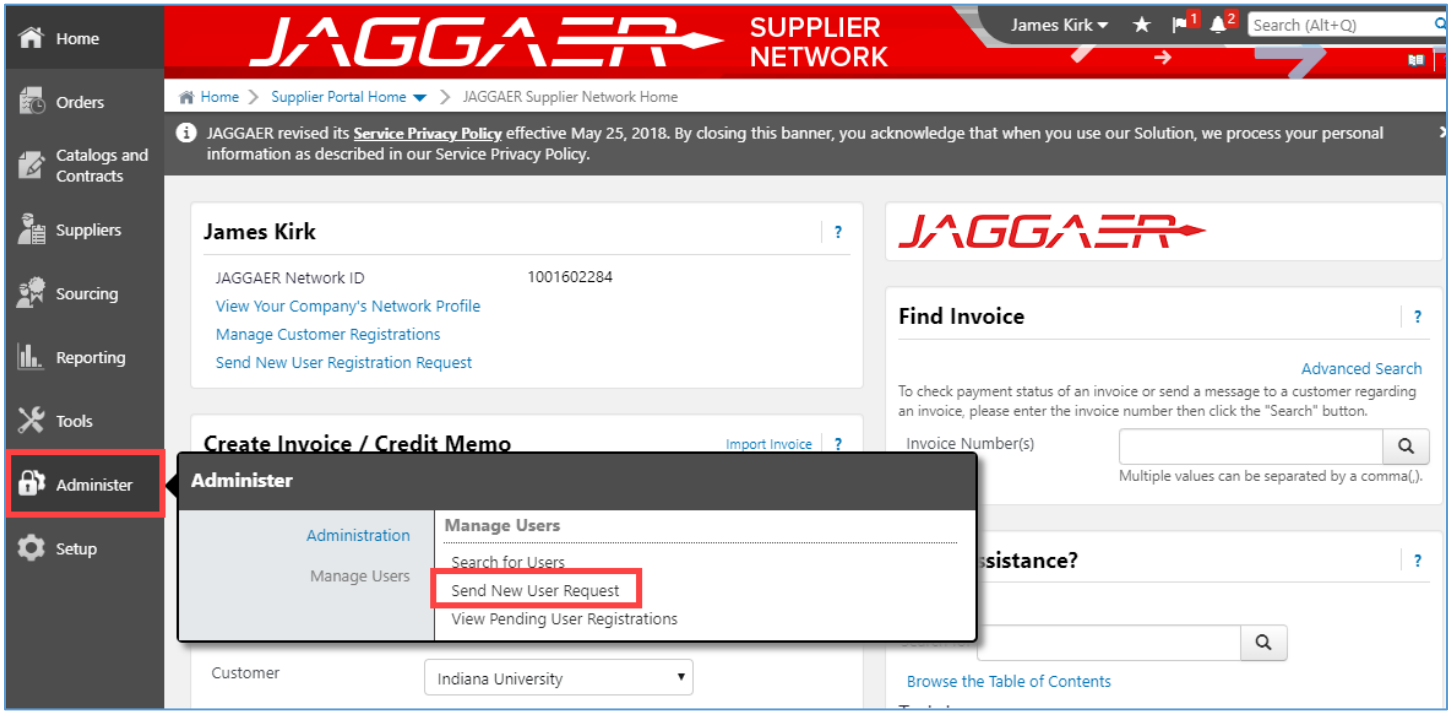
## Request a New User

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**.

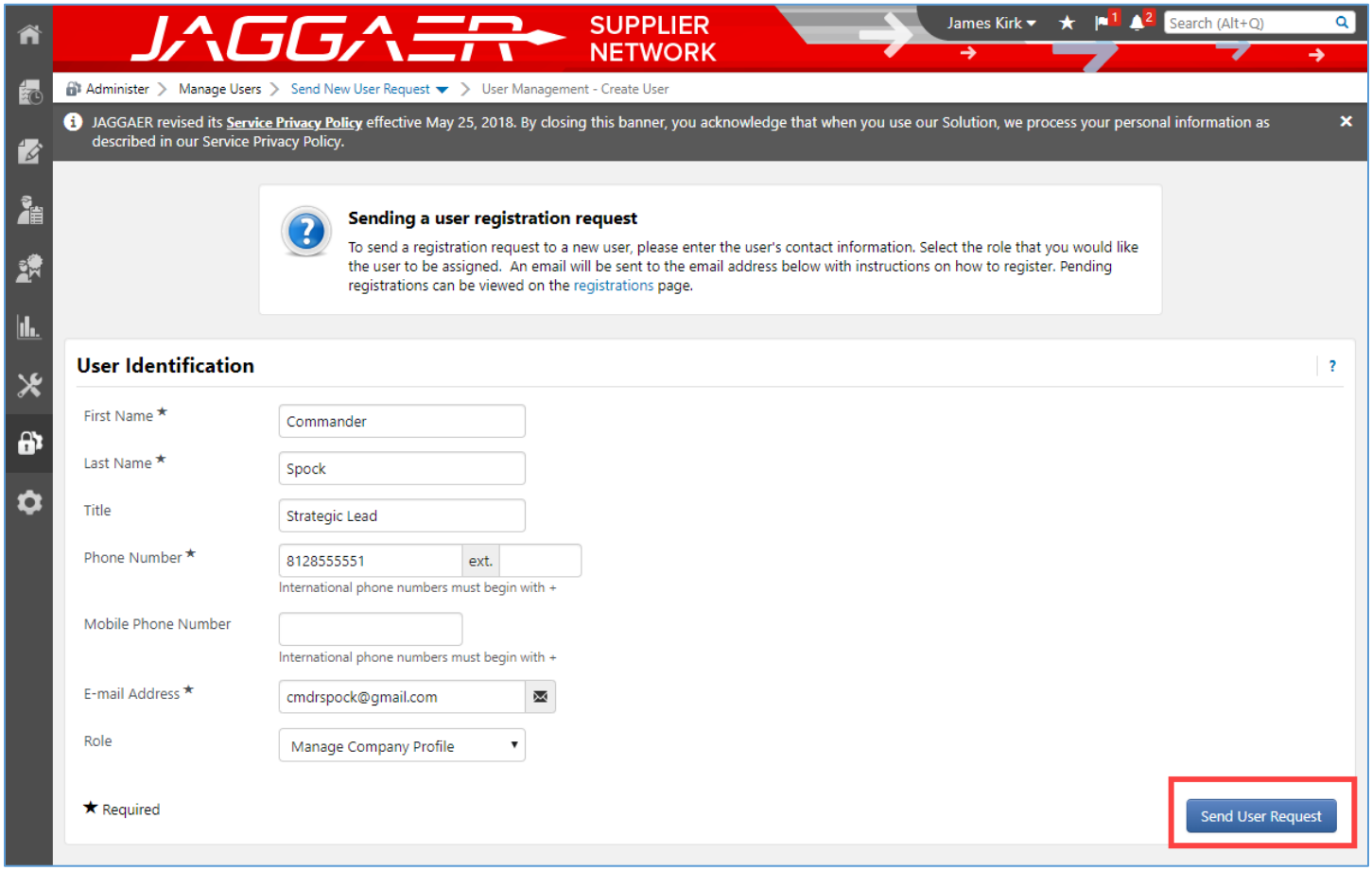



Enter the contact information for the individual you wish to grant access to your portal. You may assign one **Role** to the user; additional roles may be added later. The table below describes the permissions associated with each role.

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. |

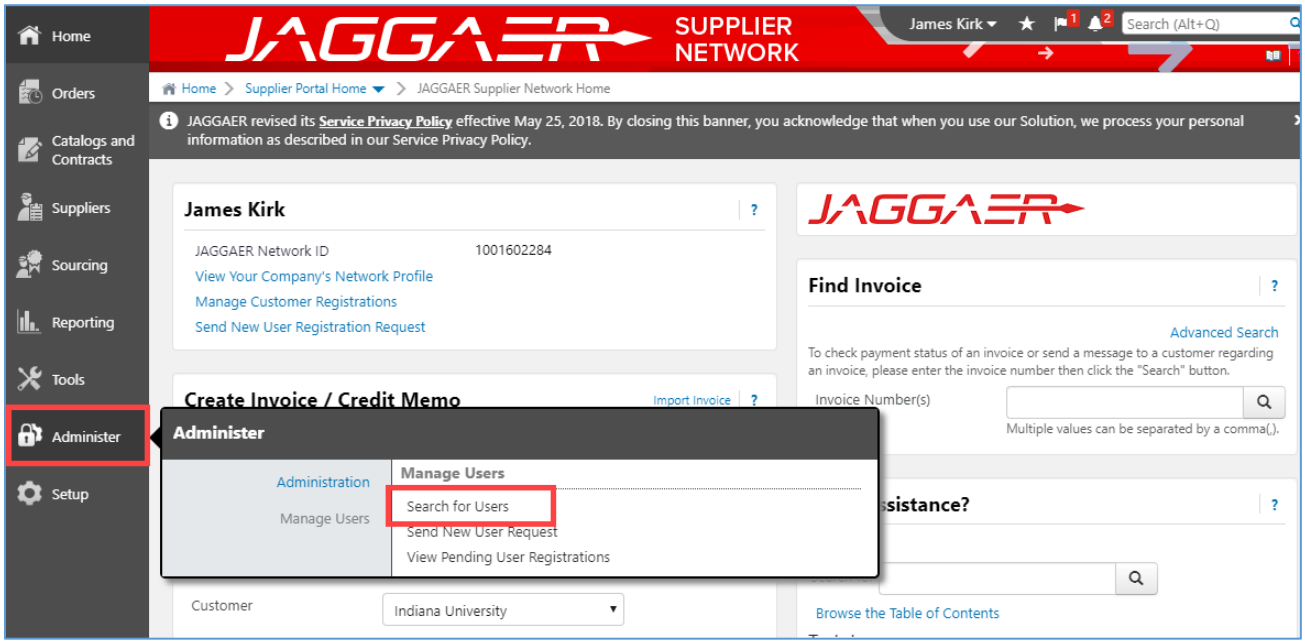
Click **Send User Request** to submit your request.



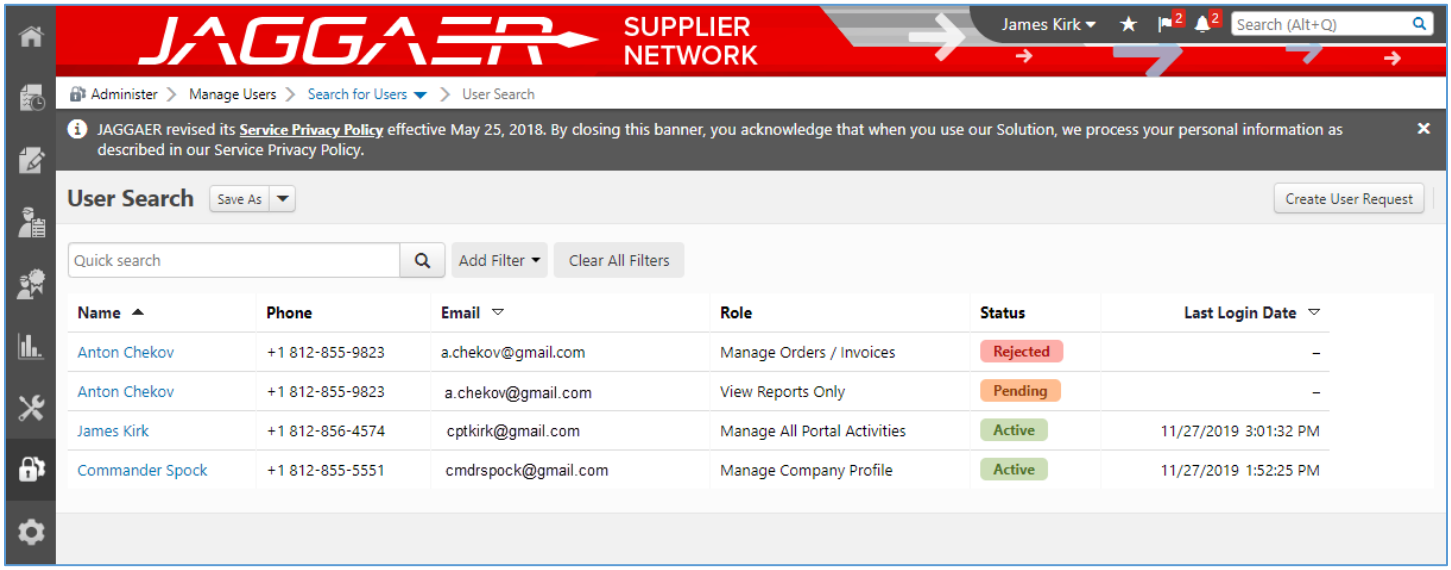

The new user receives an invitation via email to the address you specified. Once they have responded to the access request, they will have the Role you defined. [This document describes how to respond to the request](#).

## Monitoring Request Progress

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

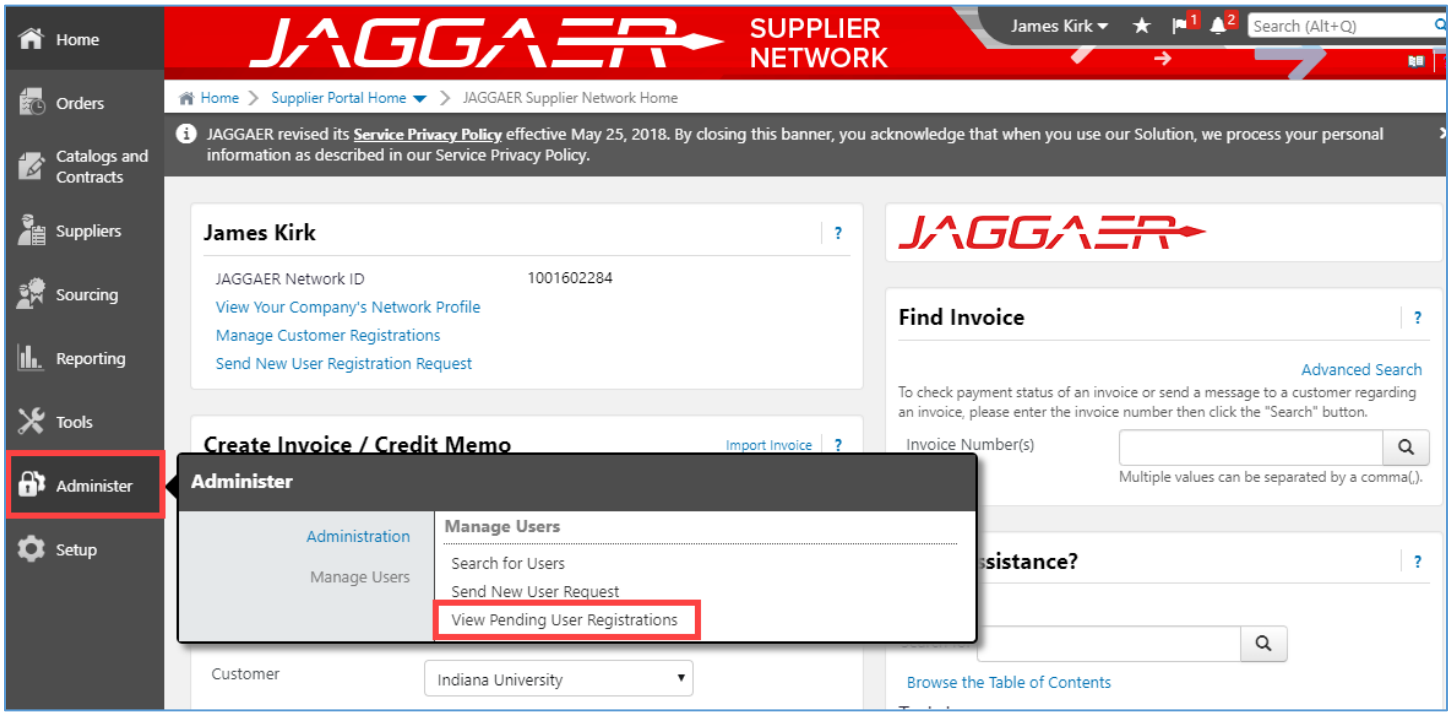


Jaggaer returns a list of all users you have requested.

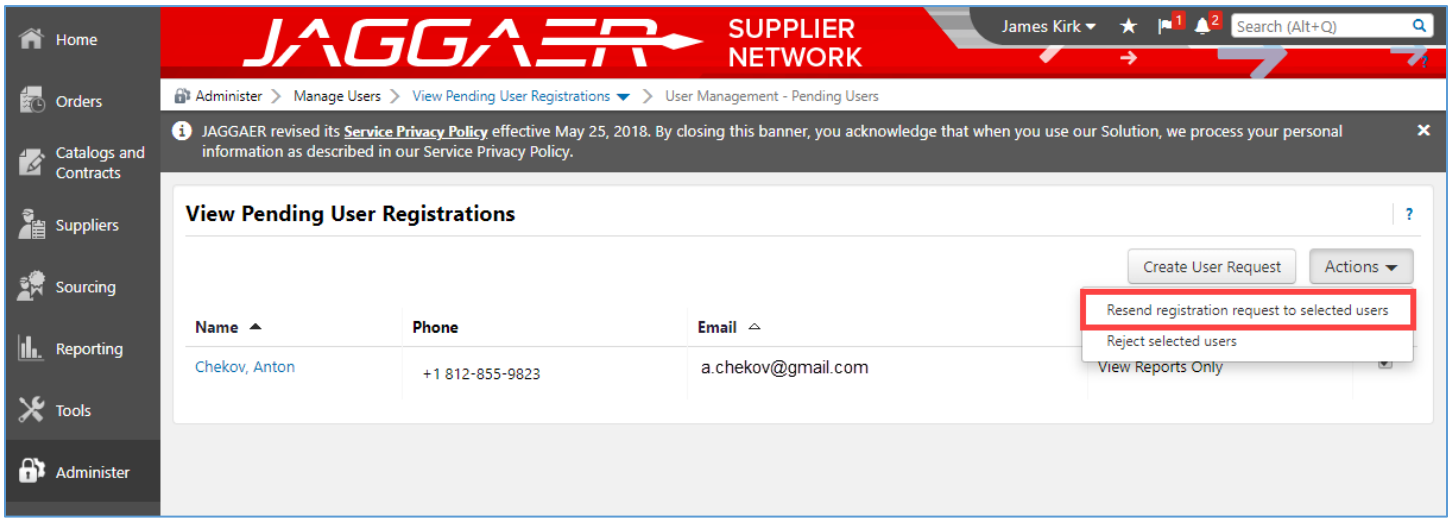



## Resend or Reject a Request

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



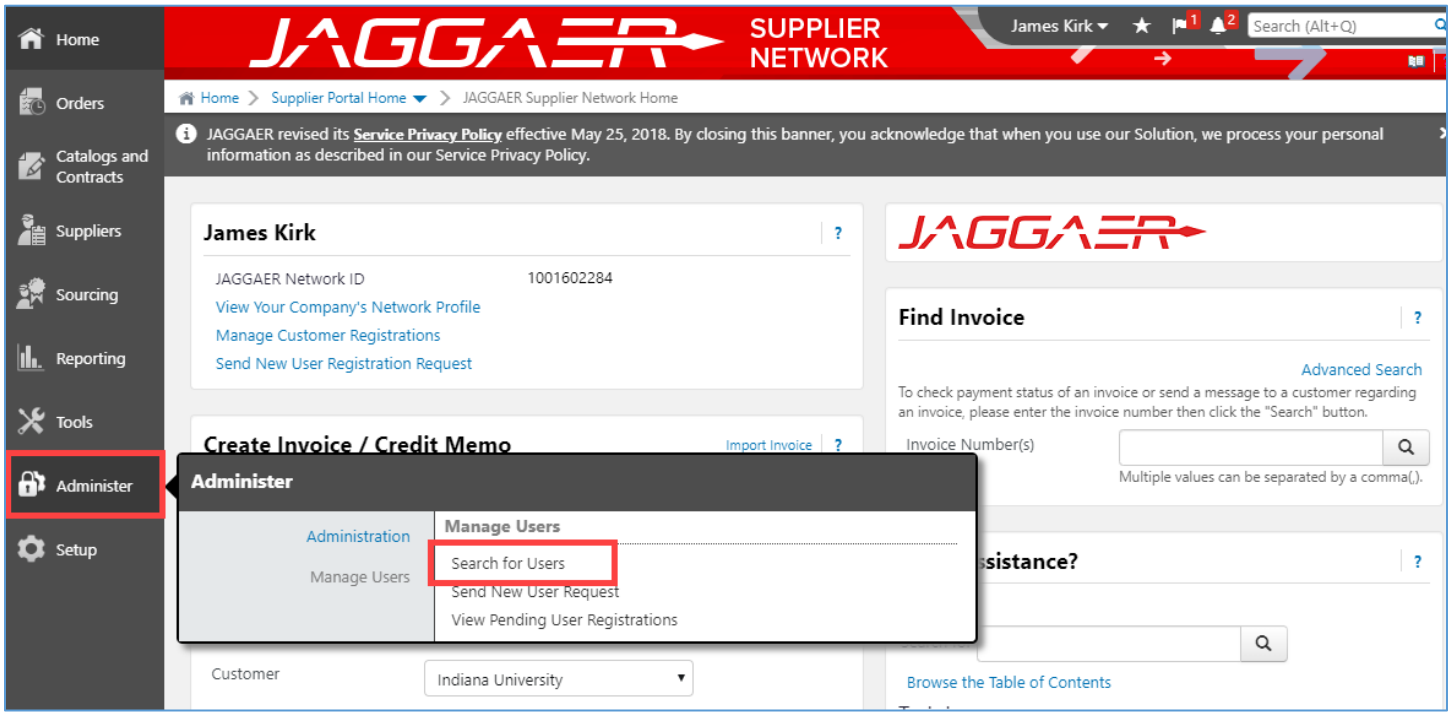
Users shown in this area have not completed the step necessary to access the supplier portal. Resend an invitation by **checking the box** next to their name and choosing **Resend registration request to selected users** from the **Action** drop-down menu.



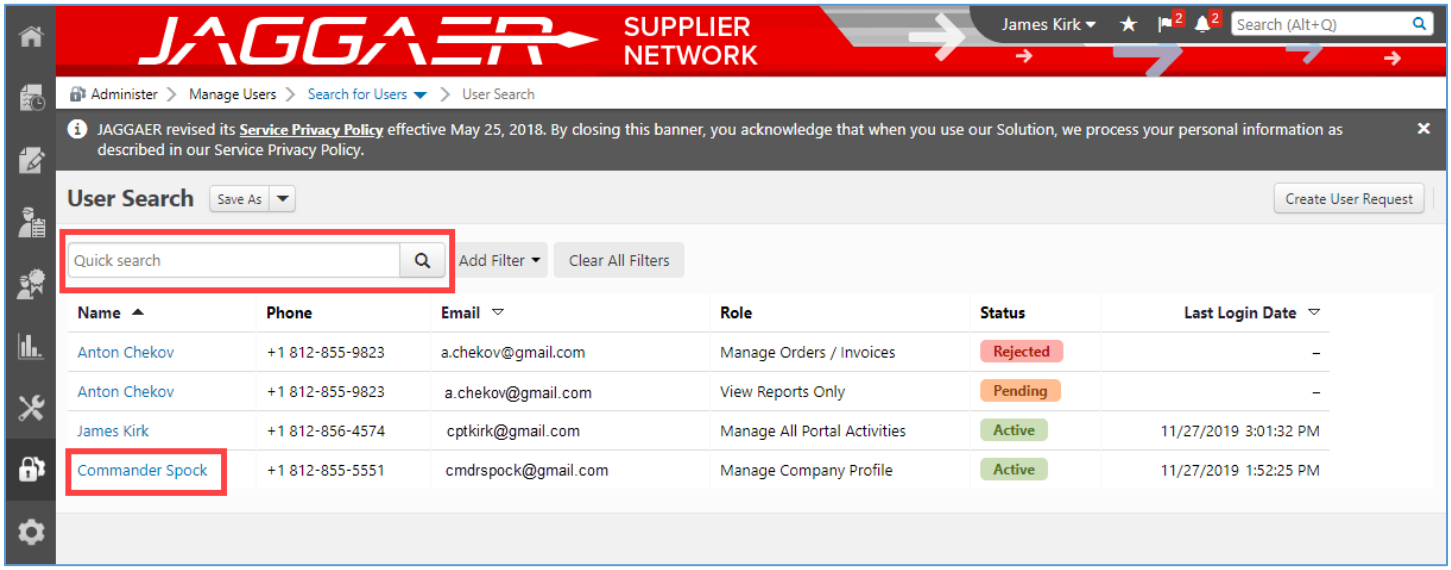

You may also cancel user requests from this area by selecting **Reject selected users**.

## Change User Permissions

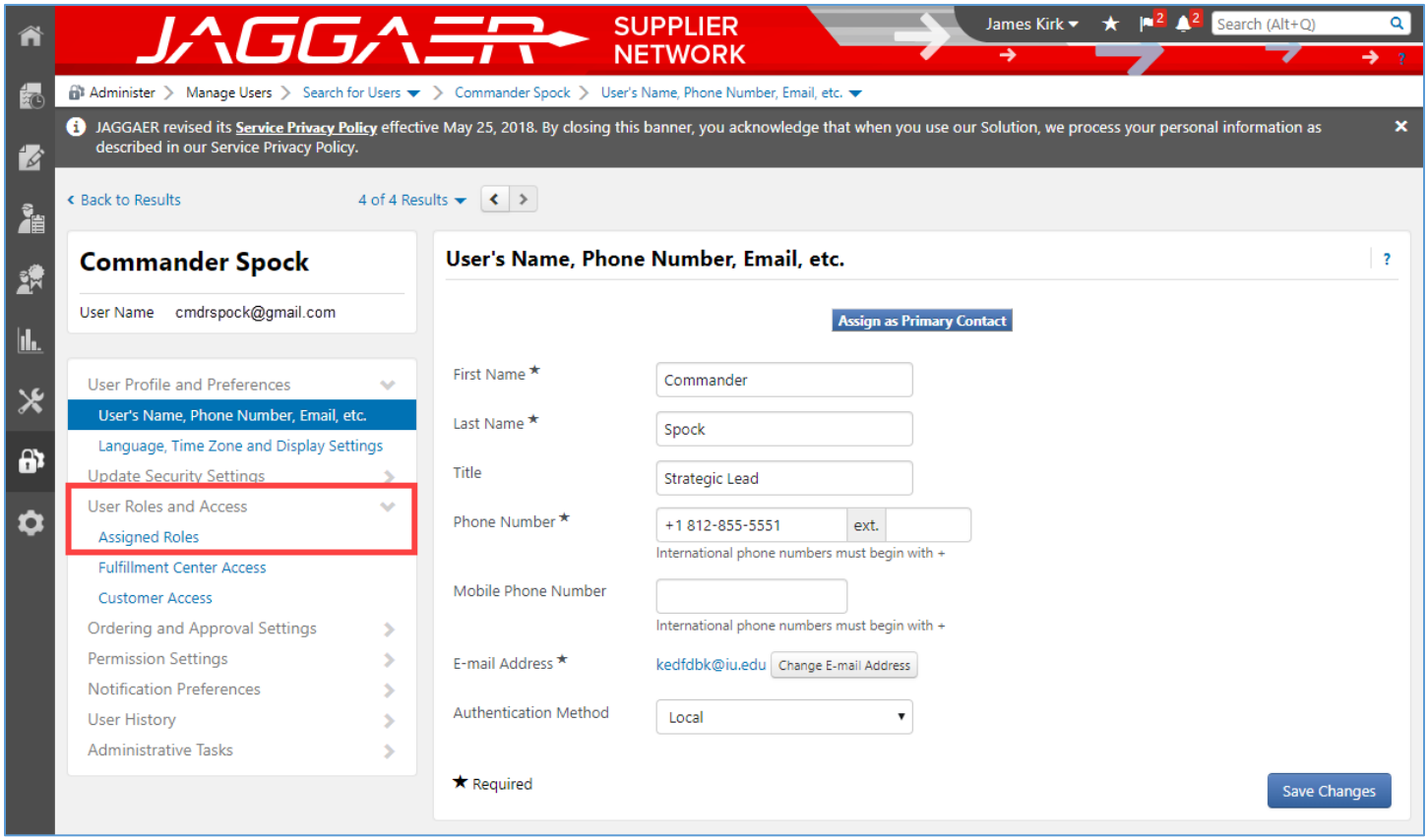
Edit an established user's permissions by first locating them in Jaggaer. A list of current users is available by accessing **Search for Users**, part of the **Administer** module.



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




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



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. |
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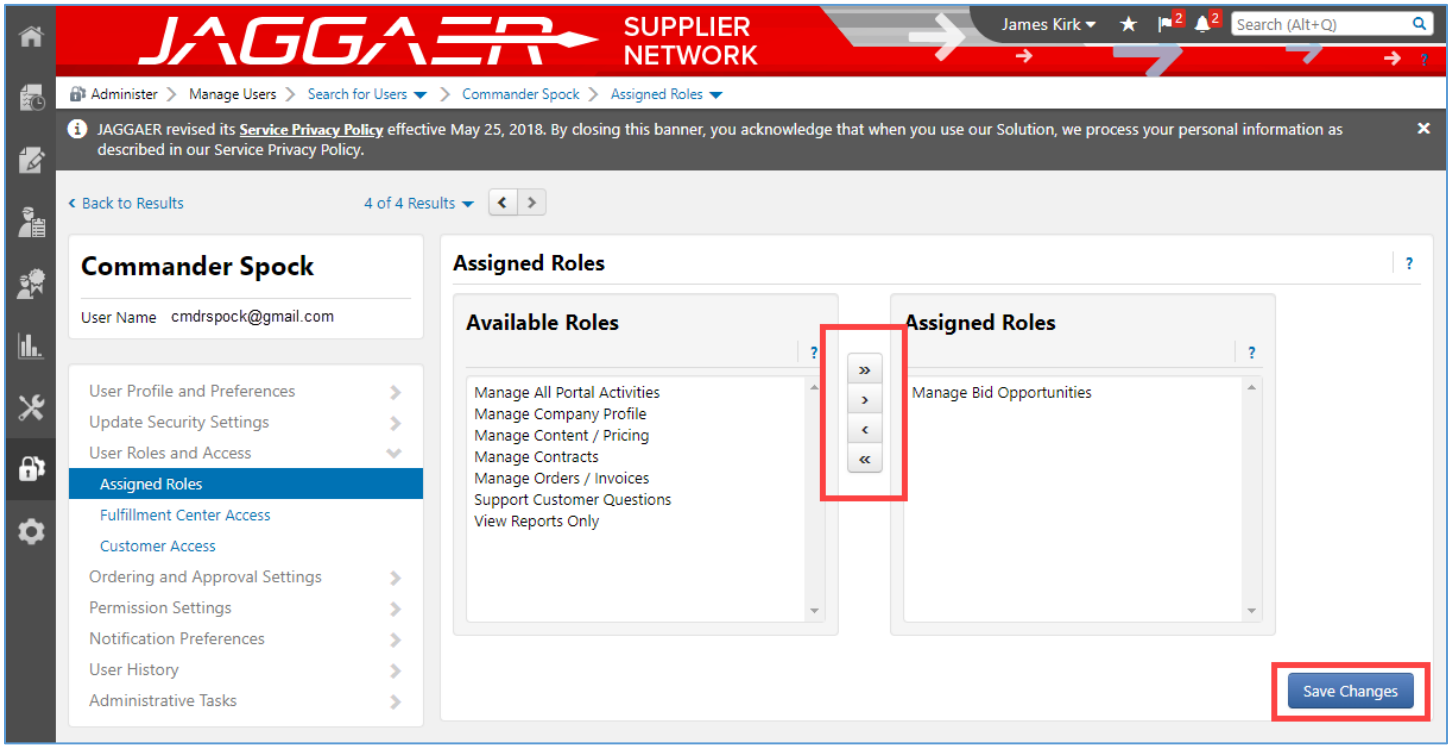
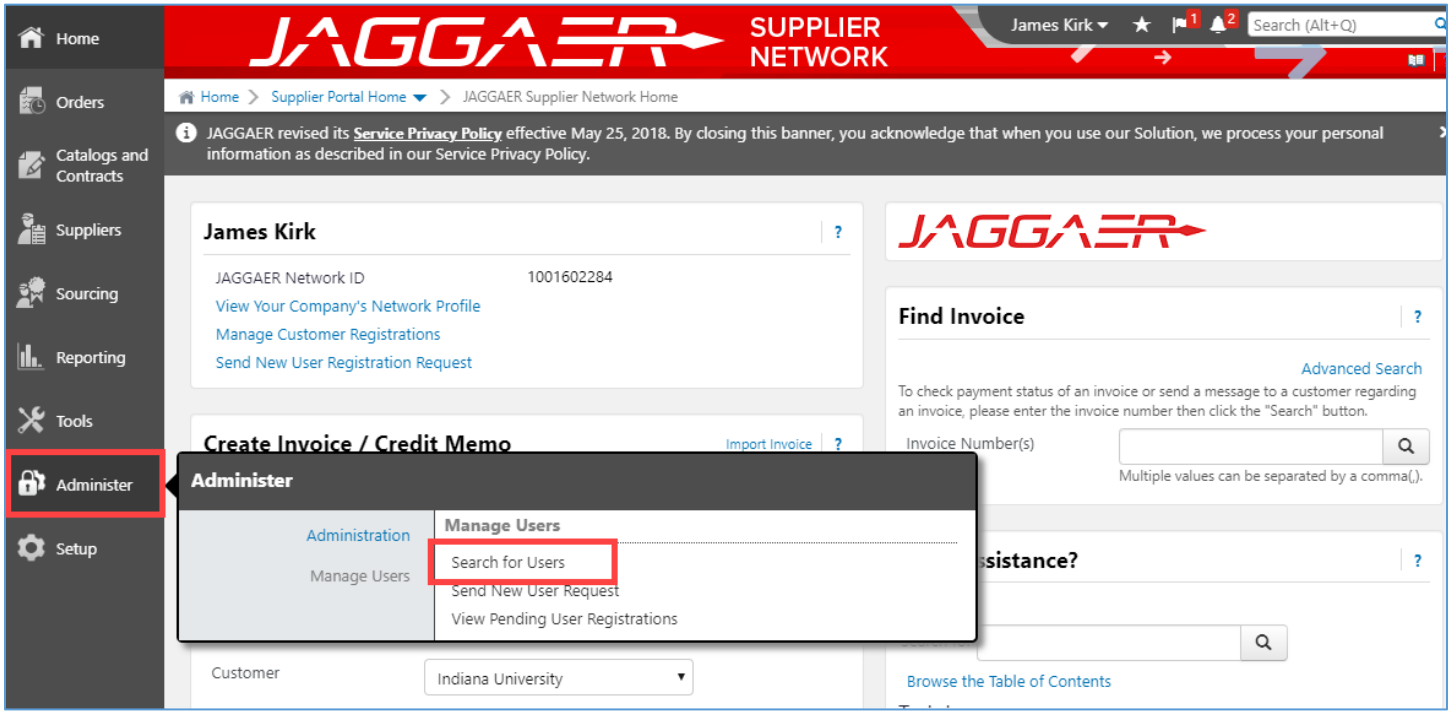
| Support Customer Questions | Able to view and edit their own profile and respond to customer questions. |
| View Reports Only | User can view and edit their own profile and access supplier portal reports but has no edit or creation permissions. |

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.

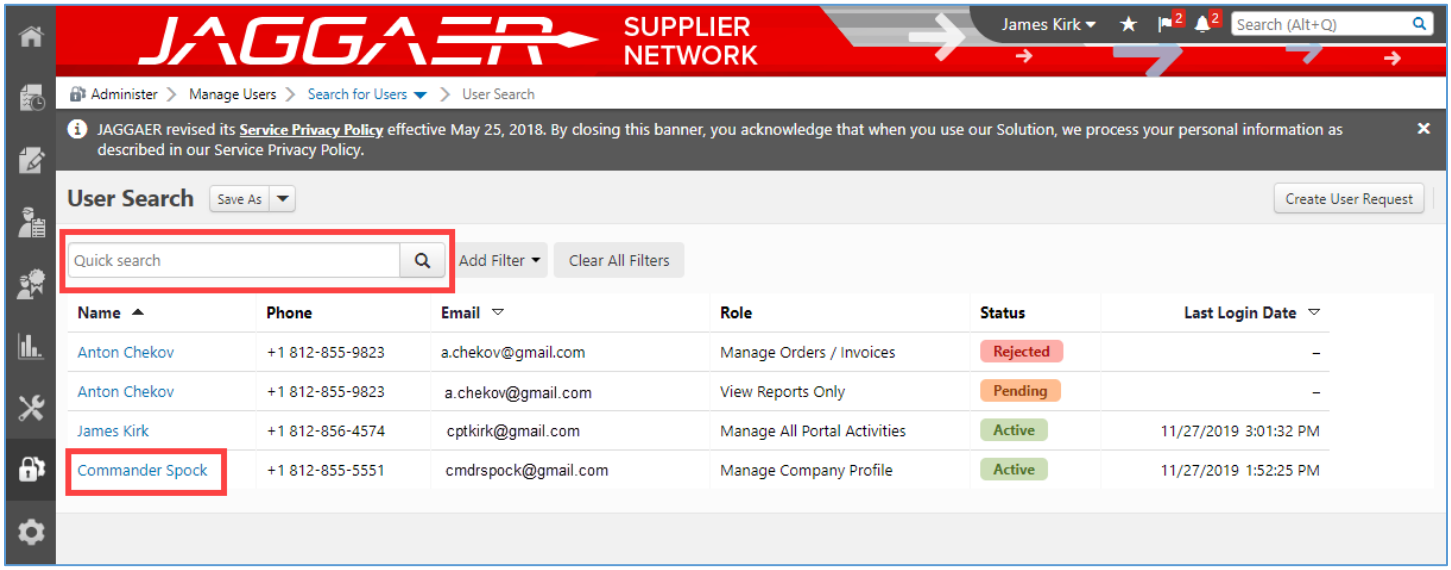


# Remove/Inactivate a User

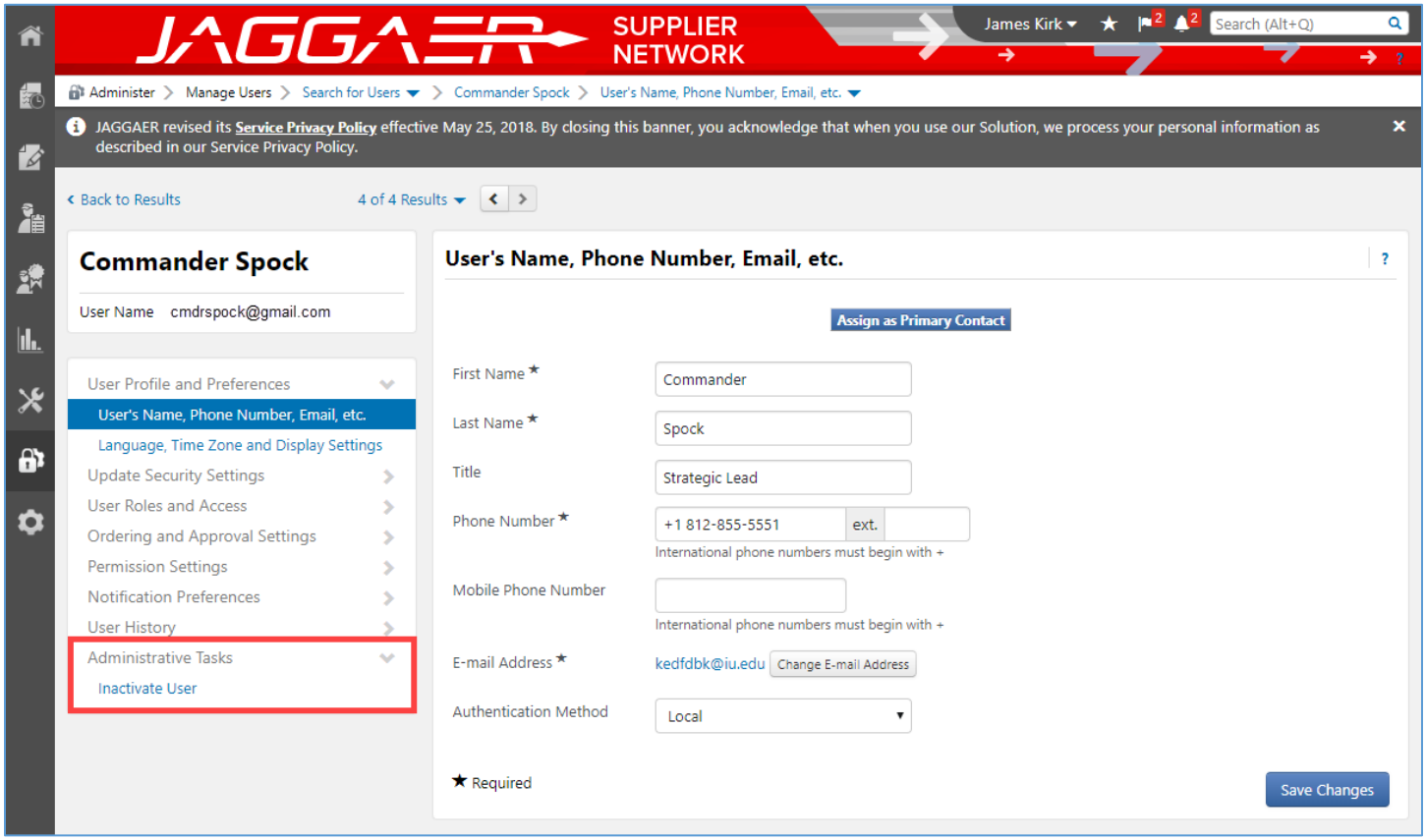
You can completely remove a user's access to the supplier portal by inactivating their profile. First, locate them in Jaggaer by navigating to **Search for Users** in the **Administer** module.

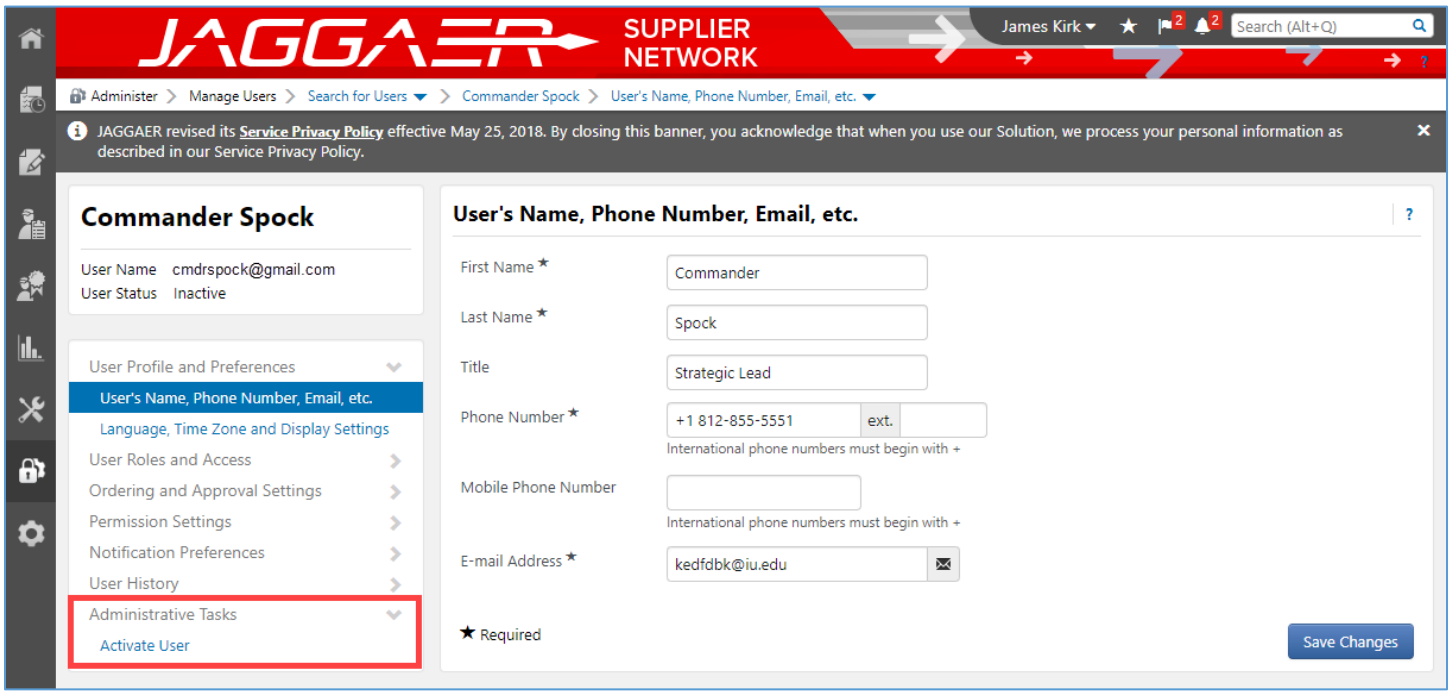



Search for the individual's name or select it from the returned results.



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




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**.