Supplier Onboarding – Self-Governed Student Org (SGSO)

Once an SGSO is active and registered in the Indiana University database, BeINvolved, there are several more steps needed to become a “supplier” in BUY.IU to receive payments. 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. IU’s Jaggaer registration portal is called BUY.IU. 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 to register an IU-SGSO in BUY.IU

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

- **Indiana University supplier invitation email.** Reach out to your Student Life coordinator to let them know you are ready to set up a supplier profile. You will receive an invitation to register as a supplier.
- **Direct deposit (ACH) banking information.** Set up a bank account under the SGSO name with IU Credit Union. IUCU is the recommended bank, but you can use another bank if preferred.
- **Scanned image of completed and signed W-9 tax form.** Apply for an EIN with the IRS. Legal Structure = Community or Volunteer Group
- **Org shared/group email address.** Though this is not required, it is strongly recommended to have an email address that future members of your org can easily obtain access to.

Already started the process and need to pick up where you left off? [Click here.](#)

Contents

Invitation..............................................................................................................................................................................2

Create Your Jaggaer Network Account ..................................................................................................................................3

Complete and Submit Registration Information .......................................................................................................................4

  - Welcome.............................................................................................................................................................................5
  - Company Overview .............................................................................................................................................................5
  - Business Details.................................................................................................................................................................7
  - Addresses ...........................................................................................................................................................................9
  - Contacts ................................................................................................................................................................................12
  - Diversity ...........................................................................................................................................................................13
  - Insurance............................................................................................................................................................................14
  - Payment Information ........................................................................................................................................................15
    - Payment via Direct Deposit (ACH)................................................................................................................................15
  - Tax Information................................................................................................................................................................17
  - Supplier Information ..........................................................................................................................................................19
  - Certify & Submit ...............................................................................................................................................................20
  - Registration Approval.........................................................................................................................................................22
  - Continue Registration.......................................................................................................................................................23
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

Indiana U TEST Site <buyiu.noreply@iu.edu> To

If there are problems with how this message is displayed, click here to view it in a web browser.

INDIANA UNIVERSITY

Supplier Invitation for Indiana University

Dear The Sampson Project,

A staff member at Indiana University has requested your addition to the IU supplier network. IU uses Jaggaer, a best-in-class procure-to-pay system. To join our network and do business with IU, you must establish your identity in our supplier portal. In this portal, you will be prompted to enter information such as tax forms and payment details.

Important: Indiana University uses Purchase Orders for securing goods and services. For all purchases, an invoice must be submitted with the Indiana University PO Number included before payment will be issued.

To get started, click the “Register Now” button below.

Register Now

You can learn more about the onboarding process by reviewing our New Supplier Registration video which provides an overview of the process. Additional resources are available on our For Suppliers page.

If you have any questions please contact the Supplier Data Management Team using our support form.

We look forward to working with you!

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

Please Reach out to your Student Life coordinator 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 to 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 SGSO name in the "Legal Company Name" Field, 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 Doing Business As (DBA) if different from legal business name (example: Legal SGSO name is "IU Biology Club", but DBA is "IUBC") -- If there is no DBA name, please leave blank
- List Country of Origin as 'United States'
- Select "NO" for DUNS number (unless one has been assigned--usually not the case for SGSO's),
- Select Legal Structure as "Other"
- Tax ID Number is the EIN assigned by IRS (Apply for an EIN with the IRS)
- Select "Not Applicable" for Legal Structure Sub-Classification.
Business Details

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

Click Edit. A new window will open with a search box.

Search "MRO48" and select commodity code. SGSOs always use MRO48.

Click **Done** to Continue.
Your selection will populate.

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, please ensure all three sections are checked in the “Add Address” box (see below)

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**. If additional addresses are necessary, repeat this process for each distinct address.

**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. This should be a contact within your SGSO (treasurer, president, adviser, etc).

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 Diversity section.

Click Next

Diversity
Click Add Diversity Classification
A new window will appear. Select **Does Not Qualify**.

### Small Business Status and Diversity Classifications

- **No Classification**
  - [ ] **Does Not Qualify as a Small Business or Diverse Supplier (CrowdNotQualify)**

- **Federal Diversity Classifications**
  - Small Business
  - HUBZone Small Business (HUBZ)
  - Small Disadvantaged Business (SDB)
  - Woman-Owned Small Business (WOSB)
  - Disadvantaged Business Enterprise (DBE)
  - Service-Disabled Veteran-Owned Small Business (SDVOSB)
  - Veteran-Owned Small Business (VOSB)
  - Women Business Enterprise (WBE)
  - HubZone Small Business (HUBZ)
  - Small Disadvantaged Business (SDB)
  - Women-Owned Small Business (WOSB)
  - Minority Business Enterprise (MBE)
  - Veteran-Owned Small Business (VOSB)
  - Women Business Enterprise (WBE)

- **State Diversity Classifications**
  - State of Indiana Minority Business Enterprise (ID-MBE)
  - State of Indiana Women Business Enterprise (ID-WBE)

Click **Done**

Click **Next**

**Insurance**

**Most SGSOs do not require insurance.** If insurance is needed, click **Add Insurance** and upload supporting document of Liability insurance.

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

SGSOs are required to receive payment via ACH/Direct Deposit

Please do not select Check or Wire Transfer options

You may enter multiple payment methods but may only have one active payment method.

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 is required. This email will receive a summary of the payment made to the provided ACH/Direct deposit account. Ideally, this should be a group email for your org.

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.
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 (Example: SGSO W9) 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.

On your W9 form: Ensure that Tax Classification is 'Other' and please fill in "Community or Volunteer Group" in the blank space to the right.

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. Please leave blank.** Click "Next"
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 TEST SITE

Indiana U TEST Site: <buyiu.noreply@iu.edu>
To: johncoop@iu.edu
If there are problems with how this message is displayed, click here to view it in a web browser.

Supplier Registration Complete for Indiana University TEST SITE

Dear The Sampson,
TEST ENVIRONMENT

Thank you for completing your Jaggair 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, you may 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 Jaggair.

Please contact the IU Supplier Workgroup with any questions by emailing supplier@iu.edu or calling (812) 855-3720, option 1.

Thank You,
TEST ENVIRONMENT

Indiana University TEST SITE
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 is the first time you are 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.