Indiana University Office of Procurement Services

**STANDARD OPERATING PROCEDURE**

<table>
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<tr>
<th>SOP NO:</th>
<th>SOP-PURCH-21</th>
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<tr>
<td>SUBJECT:</td>
<td>BUY.IU Supplier Portal Set Up Exception Process</td>
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<tr>
<td>SOURCE:</td>
<td>University Procurement Services</td>
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<tr>
<td>ORIGINAL DATE OF ISSUE:</td>
<td>1/13/2020</td>
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<tr>
<td>DATE OF LAST REVISION:</td>
<td>5/20/2020</td>
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**Disclaimer:** The information provided in this Standard Operating Procedure (SOP) is designed to provide helpful information on this procedure. Purchasing reserves the right to determine on a case by case basis if a SOP should be adjusted for a particular situation. This SOP is not intended to cover each and every situation nor can it anticipate specific circumstances.

**RATIONALE:** IU prefers suppliers utilize the Jaggaer portal when registering to do business with IU. The Jaggaer portal is a secure place the supplier can add and maintain critical data such as tax and banking information. This portal also removes the responsibility of handling this critical data from departments. Once registered, suppliers can check on status of payments, submit invoices and update contact and fulfillment information.

The exception process outlined in this SOP accommodates supplier portal set up for suppliers or individual(s) that are unable to complete the supplier registration process in Jaggaer. Exception requests are reviewed and approved by the Supplier Workgroup (SWG).

**PROCEDURES:**

1. First, submit a supplier request form to notify SWG that a new supplier is needed. The type of supplier request form used depends on the type of payment the supplier will receive. Refer to the supplier section of the BUY.IU resource page for guidance on selecting the appropriate request form.
   a. If the supplier does not have an email address, enter N/A in the email field of the supplier request form.
   b. When using the Non-Catalog Order (Purchase Order) supplier request form, enter “SUPPLIER EXCEPTION REQUESTED” in the description of items/services field.

   Provide a brief description of items/services being purchased.

2. After submitting the form, notify SWG of the exception request by emailing supplier@iu.edu. In the subject line of your email, enter “Supplier Set up Exception Request”. SWG identifies requests using this email subject line. **You must use this exact subject line to ensure your request is acted on in a timely manner.**
In the body of your email, include:

a. The type of supplier request form submitted,
b. The name and contact information (email or phone) for the individual(s) requesting assistance,
c. When using the Non-Catalog Order (Purchase Order) form, indicate the commodity area chosen (IT, MRO, ORA, PRO, or SCI), and
d. Details explaining the reason for the exception request, such as the supplier’s circumstances or ability to complete online registration.

3. SWG will review the request and notify you of its approval or rejection, as well as their justification.

   a. If the supplier can register themselves, but does not have an email address, a supplier information packet will be provided. The supplier must submit the completed packet to SWG via secure fax, 812-855-7839, or Slashtmp to supplier@iu.edu.
   b. If the supplier cannot register themselves and requires phone assistance, the approval email will include verbiage advising the supplier of next steps.

| DEFINITIONS: |
| CROSS REFERENCE: | BUY.IU Supplier Resource Tile  
| | Slashtmp Application  
| | Slashtmp Knowledge Base article  
| | Supplier Workgroup email response templates |