JAGGAER

JAGGAER ADVANTAGE
SUPPLIER USER HANDBOOK

PRODUCT VERSION 19.1

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Welcome

Objectives

The purpose of this handbook is to familiarize supplier users with tasks related to JAGGAER Advantage.

- The **Basics** section contains an overview, supplier permissions, and information on navigating JAGGAER Advantage as a supplier.

- The **Suppliers** section contains information and instructions on how to register as a supplier and participate in buyer opportunities.

Key Points

The goal of this handbook is to educate supplier users about JAGGAER Advantage.

Keep in mind that much of the how, when, and why the system is used is determined by your organization's business practices. We suggest that you supplement this document with your organization's business practices, goals, and policies.

Basics

Overview

The JAGGAER Advantage platform is a secure web based collaborative tool used by procurement professionals (buyers and suppliers) to conduct strategic procurement activities online.

Note: This is a generic guide to assist you in using the JAGGAER Advantage platform, your specific experience may vary.

Permissions (User Rights)

The following are user rights related to supplier user configuration and administration. User rignehts may be configured at the role or user level by an administrator.

For additional information about enabling user rights, see **Updating the User Rights at the User Level** in the Online Help or the **JAGGAER Advantage Administrator's Handbook**.

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Navigating

Depending on configuration and user access, you may see the following as a supplier.

Supplier Home Page

The Supplier Home page is usually the default page displayed after login. On some platforms, the Dashboard may be displayed after login.

On the upper right corner of the page, you can find links to view accessibility guidance, access your user profile, and log out. You may change your language, user details, and password within the User Profile.

The main area of the Supplier Home page displays links to the available modules, so you can use this page to reach any part of the platform.

Navigation Menu

The navigation menu is located on the left side of each page, and allows you to navigate from one module to another. To do so, click on a module icon to expand the menu and then select a link, to be directed to the page you want to access.

The following modules may be available:

- **Dashboard** - The Dashboard contains portlets that provide an overview of your activities and gives you access to them.

- **Sourcing** - The Sourcing module contains access to projects, sourcing opportunities, auctions, and contracts.

- **My Organization** - In this module, you can view and manage your profile, categories, assessments, scorecards and development actions.

- **File Sharing** - This is a buyer managed module. If activated by the buyer organization, you will have read-only access to files that have been made available to you.

- **User Management** - This module is available to users who are given the rights to manage users, roles and divisions within your organization.

Suppliers

Registration

Registration & Activation

New Suppliers must register on the platform to be considered for sourcing events. Suppliers can be activated immediately or conditionally after the registration/onboarding process.

In case of conditional activation, suppliers must pass the initial onboarding process (completing all mandatory questions in basic profile forms) in order to access the platform and view sourcing events.

Note: A supplier can also be registered by a buyer, including via Excel import.

Register as a Supplier (Self-Registration)

Step-by-Step

1. On the application login page, click **Register**. The Registration Data page opens.

2. Complete the Registration form with your organization's details and contact information for the main procurement professional within your organization.

   - Mandatory fields are marked with a red asterisk.

   - Ensure the email address is correct in order to receive the registration confirmation email

   - To register multiple email addresses, use a semicolon to separate them.

3. Click **Save**. You may receive a registration confirmation email, depending on buyer configuration. You may also receive a verification code in your email to complete this process.

Profile Form

Your profile collects the important information about your organization. It is important to complete your profile and keep it up to date.

- It contains profile forms that may be used to determine your platform access and supplier status.

- Information accumulates as you interact with the buyer organization.

- Your responses to profile questions will pre-populate in sourcing events when the questions are used in events.

- Your updated response to profile questions in sourcing events and supplier value management objects (eg. Assessments and Scorecard Survey processes) are saved back to your profile.

Complete Basic Profile Form

After registering, and depending on configuration, you may be directed to one or multiple basic supplier profile forms to provide additional information related to your company.

Complete the basic profile form or forms. You must complete this information to be considered for activation. You should update your profile as needed to ensure the most up-to-date information is available in the system.

Once the basic form is complete, click **Save & Continue** to proceed with the onboarding process. Once you have completed the basic profile form, you will be emailed a temporary password. Use the user name you entered during registration and the temporary password to log in for the first time. Enter a new password when prompted.

Note: Conditional questions will be always considered mandatory during the onboarding process even if configured as optional.

Note: After you are registered (supplier is active), you should update your Profile as needed to ensure the most current information is available in the system. You can navigate to your profile by accessing My Organization -> Organization Profile -> Registration Data on the navigation menu.

Complete Extended Profile Form

Step-by-Step

Extended Profile Forms are available to you after you have successfully registered and logged into the platform.

1. Navigate to **My Organization > Organization Profile > Extended Profile**. In the Extended Profile section, the completion status will be displayed under Supplier Data Status. The percentages indicate the completion status of Mandatory and Optional Questions in each form.

2. Click the **Title** to view the form content.

3. Click **Edit** to switch the form to edit mode

4. Enter responses for all the mandatory questions (red asterisk). We encourage you to answer optional questions for maximum accumulation of information. Non-editable questions are answered by buyers or provided by an external system.

5. Click **Save and Continue** to save your responses and move to the next form, if applicable.

Login

Login

Step-by-Step

1. Click the link in the registration confirmation email or go to the platform URL to access the login page.

2. Log in with the username and temporary password found in the email.

3. Enter and confirm a new password.

Forgot your password?

Step-by-Step

1. Click on the **Forgot your username and password?** link (text may be different on your platform).

2. Fill in your username and email address.

3. You will receive an email with a link to reset your password.

Forgot your username?

Step-by-Step

1. On the login page, click **Forgot your username and password?**

2. Click **Recover Username**.

3. Enter your email address and validation value.

4. You will receive an email with a link to access your username.

Opportunities

Opportunity Listings are used by the buying organization to advertise forthcoming public procurements. Suppliers can express interest in an RFx that is linked to the Opportunity.

RFx is used to collect Qualification, Technical and Commercial information from qualified Suppliers. RFx is equivalent to RFI, RFQ, ITT and PQQ within the eSourcing platform.

Express Interest in Opportunity Listing

Opportunities can be viewed from the login page by anyone. However, you need to register and login to express interest and participate in sourcing events (linked to opportunities).

Express Interest in a Current Opportunity

Step-by-Step

1. Navigate to **Sourcing > Published Opportunities > Current Opportunities**.

2. Click on the project title to view project details.

3. Review project and opportunity details. The Published Lots section displays RFx that are linked to the listing.

4. Click on the **Comment** button beside the RFx you want to express interest in. Details of the RFx are displayed.

5. Review the RFx details and click **Express Interest**. A pop-up opens explaining that you are about to express interest in the RFx.

6. Click **OK**. Another pop-up opens explaining that you have expressed interest in the RFx and to create a response for the RFx.

7. Click **OK**. After expressing interest, depending on the type of RFx, the RFx is moved to either the My RFIs or My RFQs area.

RFx

Opportunity Listings are used by the buying organization to advertise forthcoming public procurements. Suppliers can express interest in an RFx that is linked to the opportunity.

RFx are used to collect qualification, technical and commercial information from qualified suppliers. RFx include RFIs, RFQs, ITTs and PQQs within JAGGAER Advantage.

Manage RFx Responses

Create Online Response

Step-by-Step

1. Depending on the type of RFx:

- Navigate to **Sourcing > RFIs > My RFIs**.

- Navigate to **Sourcing > RFQs > My RFQs**.

2. Click on the RFI/RFQ **title** to access the RFx. The My Response page opens.

3. Review the content of the RFx.

   - The RFx closing date/time is noted in the header

   - Buyers may upload general documents for you to read. You can download them in the Buyer Attachments area.

4. Click **Create Response** to start the process. A pop-up opens explaining the next steps.

5. Click **OK**. Notice the My Response Summary area. It helps you keep track of your response progress based on the mandatory questions answered.

6. Click **Edit Response** to edit your response for each section. Some RFx have multiple sections while others have one.

7. Provide responses to the available questions. Mandatory questions are marked with a red asterisk.

8. Click **Validate Response**. The system will check the responses and show you the results.

9. Click **Save and Continue** to save.

10. If you want to access the other sections of the RFx, save your response and return to the My Response page. From there, you can open and respond to questions in the other sections.

Create Offline Response

Step-by-Step

If you want to respond to the RFx offline, you can download the questionnaire as an Excel spreadsheet, complete it offline, then import the file to populate the online RFx with your answers.

1. Navigate to the RFx and click **Create Response**.

2. Click the … dropdown button and select **Export/Import Response**.

3. Click **Download** to download the questionnaire in Excel format.

4. Follow the instructions and complete all mandatory questions (color coded yellow).

5. When done, save the file and return to the Export/Import Response page.

6. Click **Import Excel** to upload the completed Excel questionnaire.

   - The system will run a compliance check to see if there are missing rows or non-compliant responses (e.g. texts entered in a numeric field), or missing mandatory responses. If all

checks pass, you can proceed to save your responses. If not, correct the errors indicated in the system message and re-import the questionnaire.

7. Click **Save Changes** to save.

Modify Response

You may edit and re-submit a submitted response, up to the closing date and time.

- To modify responses online, click Edit Response to turn on edit mode and update your responses accordingly.

- To modify responses offline, you need to download the excel questionnaire, update your response, and then import the questionnaire into the system.

Delete Response

If your current responses are no longer applicable and the RFx closing date/time has not passed, you can delete your responses.

Click the **...** dropdown button and select **Delete Response**.

Once confirmed, all of your previous responses are deleted. You will return to the My Response page, where you will have the options to Create Response or Decline to Respond.

Withdraw Response

Step-by-Step

If you would like to withdraw from the RFx, you must delete all responses entered previously, then proceed with the following:

1. Navigate to the RFx.

2. From the My Response page, click the **...** dropdown button and select **Decline to Respond**.

3. Enter a reason and confirm the action. The system will notify the buyer of the withdrawal.

You can still submit responses at any time until RFx Closing date. To do so, use the Undo Decline feature on the My Response page.

Submit Response

Step-by-Step

Once the RFx questionnaire is completed, you are ready to publish your responses to the buyer organization.

1. Navigate to the RFx.

2. Click **Submit Response**. A pop-up opens explaining that you are about to submit the response.

3. Click **OK**. A pop-up opens explaining that you have submitted your response.

4. Click **OK**. In the RFx header, the response status changes from Not Submitted Yet to Response Last Submitted On [date/time].

Manage Messages

If you ever have questions about the RFx, you can contact the buyer through the Messages area within the RFx.

Note: Pay attention to the date and time indicated in the **End Date for Buyer Replies to Messages** field on the RFx Settings page. The buyer may not respond to your message after the date and time noted.

Create and Send Message to Buyer

Step-by-Step

1. Navigate to the RFx.

2. Navigate to the **Messages** tab, then click **Create Message**. A page for creating the new message opens.

3. Select a **Message Classification**. Classify the message if the buyer organization has the categories configured.

4. Enter a **Subject**.

5. Enter the **Message**.

6. Optionally, add an attachment to support your message

Under the Messages tab, a Sent Messages area is displayed. From this page, you can keep track of sent messages, see if they were read by the buyer, and see the message replies.

Reply to Buyer Message

Step-by-Step

1. Navigate to the RFx.

2. Under the **Messages** tab, navigate to the **Received Messages** page.

3. Click **Reply** to compose your message to the buyer.

4. Click **Send Message** to send your reply.

Auctions

You may encounter the following types of auctions as a supplier using JAGGAER Advantage.

English Auction:

- **Forward** - Bidding starts with a low price, and is raised as higher bids are solicited, until either the auction is closed or no higher bids are received.

- **Reverse** - Bidding starts with a higher price, and is decreased as lower bids are solicited, until either the auction is closed or no lower bids are received.

Japanese Auction:

- **Forward** - Bidding starts with a low price. For each bid, the buyer raises the price and present it to all suppliers. Each supplier must signal their willingness to remain in the auction at the current price. The auction is over when only one supplier remains, or when only a pre-set number of Suppliers remain.

- **Reverse** - Bidding starts with a high price. For each bid, the buyer lower the price and present it to all suppliers. Each supplier must signal their willingness to remain in the auction at the current price. The auction is over when only one supplier remains, or when only a pre-set number of suppliers remain.

Dutch Auction:

- **Forward** - The buyer offers bid in fixed intervals and it decreases every time until a reserved price is reached. Before the reserved price is reached, if a supplier places a bid for the item, it is allocated to the supplier and the item closes for bidding.

- **Reverse** - The buyer offers bid in fixed intervals and it increases every time until a reserved price is reached. Before the reserved price is reached, if a supplier places a bid for the item, it is allocated to the supplier and the item closes for bidding.

Lot Auctions:

- **Single Lot** - This type of auction normally is used for the allocation of a single item.

- **Multi Lot** - This type of auction revolves around selling more than one identical item at the same time, rather than having separate auctions for each.

Manage Auctions

View My Auctions

To view auctions, navigate to Sourcing > Auctions > My Auctions. In the My Auctions area, you will see a list of auctions you've been invited to. The title, status, start time, end time, and Buyer Organization will be displayed for each auction.

Note: The Auction monitor icon will only appear in the Monitor column for Auctions with a Confirmed, Running, Suspended, Terminated, Not Awarded, or Awarded status.

Launch Auction Monitor

Step-by-Step

1. Navigate to the auction you are invited to, and click on the Auction Monitor icon. A new window will pop up and ask you to choose how you want to view the auction.

2. Choose the Java option. To launch the Auction Monitor, please make sure you are running the auction in:

   - Internet Explorer 9.0 or above.

   - Java 1.8 or higher

3. Click Enter to confirm selection. The Auction Monitor will load.

Enter and Submit Bids

Step-by-Step

1. Select the Lot that you would like to bid on.

2. Click into the Unit Price box and enter your bid is compliant with the Minimum Bid Decrement displayed in the Auction Details.

   - Your next bid (for the lot) should always be lower than the previous bid. The Unit Price cell will turn yellow if there's a change in price; otherwise it will remain in green.

3. Click the "Submit" button in order to send your new bid or click "Reset" to delete the entered bid.

4. Once you have clicked "Submit", a pop-up box will ask if you want to confirm your bid submission.

5. Click "OK" to confirm. Once the new bid is submitted, a pop-up will notify you that the bid has been successfully accepted.

6. Click "OK" to continue bidding.

Modify Duplicate Bid

Step-by-Step

If Reject Duplicate Bids are set to "Yes" by the Buyer Organization, then you will not be allowed to enter the same bid value that was entered by another supplier.

1. Click "OK" if the notification appears to inform you that the bid was already issued by another supplier.

2. Update your price in the Unit Price cell(s) so the bid value is lower than the duplicate bid.

Modify Bids that are Non-compliant with Minimum Bid Decrement

Step-by-Step

Reduction in bid value must meet the requirement set in the Minimum Bid Decrement field. In case your bid is too high or too low to be accepted:

1. Click "OK" if the notification appears to inform you that the bid is not low enough or is too low.

2. Update your price in the Unit Price cell(s) so the bid value is decreased by the amount indicated in the Minimum Bid Decrement field.

Manage Auction Messages

Create and Send Messages to the Buyer

Step-by-Step

To communicate with the Buyer Organization during the Auction, you can use the Message feature within the Auction Monitor

1. Click the "Message" tab in the Auction Details section

2. Click the "New Message" button at the bottom of the tab.

3. Type your message into the pop-up box.

4. Click "Send" to send your message to the Buyer

View Received Messages

Step-by-Step

When the Buyer Replies or sends you a message during an Auction, it will be displayed as a notification on the Auction Monitor.

1. Review the message and click "OK" to return to the Auction Monitor.

2. To View the message again or other Buyer messages, you can find them in the Messages section. Click on the Sender column heading to sort the list and bring the buyer messages to the top of the list.

Manage Final Bids

Bid Overtime Interval

This is a time extension that's added to the auction end time or that will reset the end time by 'x' minutes in the final minutes of the auction. The setting is indicated in the Date & Time Settings section of the Auction Details page

The countdown of an auction with Overtime Interval set to "Add 3 minutes" is shown here

Once the Time Remaining drops under 3 minutes, and you enter a bid on a lot (any lot if it's a multi-lot auction), the countdown will re-set to 3 minutes.

Auction Closing Notification

When the auction has ended, you will receive a pop-up notification that the lot is closed for technical checks. You will no longer be able to place bids for the lot. Click "OK" in the pop-up notification. Exit the Auction Monitor or continue to bid on other running lots.

Organization Profile

To view organization profile information, navigate to **My Organization > Organization Profile**, then select the page you would like to view.

The following pages are available under Organization Profile:

- **Registration Data** - Contains a record of the organization details you entered when registering as a supplier. Click the Edit button to change any of the available fields.

- **History of Changes** - Contains a record of the changes made to registration data and primary supplier status (eg. supplier activation).

- **Basic Profile** - Contains a record of the basic profile information you entered when registering (before activation). Click the title of each section to view the details of that section. You can also click the Edit button on the details page of any section to edit the available fields.

- **Extended Profile** - Contains a record of the extended profile information you entered when registering (after activation). Click the title of each section to view the details of that section. You can also click the Edit button on the details page of any section to edit the available fields.

- **Status Summary** - Contains information related to the completeness of your registration and organization status.

- **Response History** - Contains the history of the values answered for each question.

Categories

If enabled, categories are used to classify your organization against the Category Tree, to indicate the categories of supply (product or service) your organization provides.

According to system configuration, the category tree can be displayed during the onboarding process, or after activation.

Suppliers can add classifications only at the leaf level.

It is important to classify your organization in the most relevant categories and in as many categories as possible, to ensure that you get all related opportunity listing alerts. Opportunity listings are used by the buying organizations to advertise future public sourcing events for specific categories of supply.

Your classifications may also be used as the basis for a formal supplier category qualification called category assessment.

Search and Select Categories

Step-by-Step

Depending on the buyer organization, Category Tree classification may be completed during or after the registration process.

1. Navigate to My Organization > My Categories.

2. Click Add Category to view the category tree. Each Category may have levels of subcategories. You can use the Display Selected Only, Expand All, and Collapse All buttons to control the display of subcategories in the tree.

3. To search for categories, use the Free Text Search feature by entering a keyword or category code, then click Search. The tree refreshes and displays the matching categories.

4. Select the appropriate category or categories (at leaf level).

5. Click Confirm Current Selection.

Complete Category Specific Forms

Buyer organizations can associate forms to specific categories in the category tree. As you make category selections, you may be taken to a page to complete the associated category form (associated to that category).

Step-by-Step

1. Enter responses for all the mandatory questions (red asterisk).

2. Click Save to save your responses and return to My Categories.

The page lists all of your Categories and Forms, their Completion Status, and Category Assessment status (if the category is set-up for formal qualification).

Assessments

To view the Assessments area, navigate to My Organization > Assessments, then select the type of assessments you want to view.

The Assessments area contains access to the following pages:

- **Editable Assessments** - Contains a list of editable assessments.

- **Segmentation Assessments** - Contains a list of segmentation assessments.

- **Qualification Assessments** - Contains a list of qualification assessments.

- **Risk Assessments** - Contains a list of risk assessments.

- **Category Assessments** - Contains a list of category assessments.

Note: According to configuration, suppliers may or may not be able to view assessment details.

Manage Assessments

Edit Assessments

Step-by-Step

1. Navigate to My Organization > Assessments > Editable Assessments. The page opens with a list of editable assessments and their completion percentages.

2. Select the assessment to edit by clicking on its buyer organization. A list of editable forms for the assessment, with completion percentages, is displayed.

3. Open the form to edit by clicking its title.

4. Click the Edit button on the form. The form switches to editable mode.

5. Enter responses to the fields on the form.

6. Click Save and Continue. The form is saved and you are prompted to return the forms to the buyer or do it later.

   Once you return a form to a buyer, it is no longer editable, and no longer appears on the Editable Assessments page.

Scorecards

To access the Scorecards area, navigate to **My Organization > Scorecards** and select the type of scorecards you want to view. The Scorecards area contains access to the following pages:

- **In Progress Surveys -** The supplier super user may be requested to complete a supplier survey on a scorecard from a notification sent to their email address. They can access surveys through a link in the email notification or by logging into the application.

- **Enterprise Scorecards** - Enterprise scorecards are directly linked to a supplier profile. They are used to assess the supplier's performance in terms of their relationship with the entire buyer organization.

- **Segmentation, Qualification, Risk Scorecards** - Used by buyers for universal assessments. These scorecards are usually used to associate a quantitative evaluation to a qualitative result of the assessment process.

- **Category Assessment Scorecards** - Used for category assessments by buyers. These are typically used to associate a quantitative evaluation to a qualitative result of the assessment process.

- **Contract Scorecards** - Contract scorecards are used to evaluate supplier performance within the scope of an individual contract.

Respond to a Supplier Survey

The supplier super user may be requested to complete a supplier survey on a scorecard from a notification sent to their email address. They can access surveys through a link in the email notification or by logging into the application.

Step-by-Step

1. Access the supplier survey using one of these options:

a. In your email provider, find the email that contains "Enterprise Survey Response Required On: [organization platform]".

b. Click on the **link** at the bottom of the email. Enter your supplier user login credentials and click on the **Submit** button. You are taken to the Supplier Survey page in the application. A list of questions that have been made available to the supplier are displayed.

From the application

a. Enter your supplier user login credentials and click **Submit** button to open the application.

b. Navigate to **My Organization > Scorecards > In Progress Surveys**.

c. Open the **scorecard** with the survey you want to complete. You'll be taken to the **Survey Form**.

2. On the Survey Form, enter a value in the open **Response** field for each KPI.

3. (optional) If you want to send a message to the buyer, click the **Access Scorecard Messages Area** link, then create and send a message.

4. Choose one of these options:

    • Click **Save** to save your responses and return to the survey later.

    • Click the **Save and Complete Survey** button to complete the survey, then click **OK** in the pop-up window.

Receive and Send Messages as Supplier

A supplier's main contact will receive an email when a message is sent to the supplier from a scorecard. They can use a link in the email to open the email and reply to it from the application. The reply is displayed on the Messages tab on the scorecard.

Step-by-Step

1. In your email provider, find the email that contains "New Message for [name] Scorecard on: [organization platform]".

    Note: Only the Subject of the message is visible in this email. You will not be able to read the message itself until you sign into your supplier user account and access it within the platform. The scorecard must be visible to the supplier.

2. Click on the **link** at the bottom of the email.

3. Enter your Login Credentials and click the **Submit** button. You can now see the body of the email message.

4. View the range of actions available to you within the Messages toolbar:

- **Back** - Return to the Received Messages list.

- **Reply** - Reply to this message using the secure online messaging system.

- **Forward** - Forward this message to an email address outside the platform. This feature is dependent on your platform's configuration.

- **Print** - Print the contents of the current page.

5. Click **Reply** to begin drafting your response to the message. You will now be in the Create Message page and the Subject line is already filled in, similar to a standard email. The message from the buyer is also displayed.

6. Enter the **comment** you want to send in the My Message field.

7. Click **Send Message**.

File Sharing

File Sharing is a buyer managed module. If activated by the buyer organization, you will have read-only access to files that have been made available to you.

View Shared Files

To view shared files, navigate to File Sharing > Directories, then select one of the following:

- **List of Directories** - This page lists the shared file directories you have access to.

- **Search** - This page provides advanced search functionality for searching for files shared with you.

User Management

The Super User is the first user that registered on the platform and is responsible for managing other users. The User Management module is where the Super User manages individual user accounts, divisions, user roles, and organizational activity assignments.

Depending on configuration and user access, you may have access to the following pages under User Management:

- **Users** - Only users with the "User Setup and Management" right can create user accounts and manage user rights and roles. They can modify User details, modify User Rights, create user Roles and create Divisions.

- **User Details** - This allows you to configure User contact information, Role, Division, language settings, and Username.

- **User Rights** - This allows you to configure user visibility and access rights to Auctions, RFIs/RFQs, User Management and File Sharing Directory (if activated by the buyer). User Rights can be packaged into User Roles for quick user right assignments.

- **Default Users** - Allows only the Super User to manage a specific User account to receive all email alerts related to events to which your Organization is invited and to manage activities in those events on behalf of your organization.

Users

Create User Account

Step-by-Step

1. Navigate to User Management > Manage Users > Users.

2. Click Create to enter the details of the new account.

3. Fill out all of the mandatory fields (red asterisk) and choosing a username that will be memorable to the new user, e.g. a combo of first initial and last name.

4. Click Save to create the new user account.

   Note: The Division was auto-created when you registered on the platform. The first user that registered is automatically appointed as the Division Manager.

5. The user will receive a system generated email with their login information

6. By default, user rights are NOT assigned to a newly added user, unless the user was assigned a Role with user rights configured during account creation.

Edit User rights

Step-by-Step

1. Navigate to User Management > Manage Users > Users.

2. Click the user's name to open the User Details page for that user.

3. Click the User Rights link under the Details tab.

4. Click Edit to turn on edit mode

5. Amend the user rights in each module by selecting the relevant options from the drop down lists.

6. There are usually 3 levels of access:

- No (No access at all)

- Yes, if I'm added to the User Rights list in the Object (Access is given to user within the individual Auction, RFx, and/or Contract)

- Yes (Access is given to all events)

7. Once complete, click Save to save the requested level of access.

User Roles

Users with the "User Setup and Management" right can group user rights into roles, to quickly apply to users who require the same access configuration. The rights for each user account can still be manually revised after the role assignment.

Create User Role

Step-by-Step

1. Navigate to User Management > Manage Users > User Roles

2. Click Create to turn the page into edit mode.

3. Give the User Role a name. It has to be unique within the organization. Decide whether if it's a shared role that is visible and selectable by all divisions

4. Amend user rights.

5. Once complete, click Save to create the new User Role.

You can now return to the existing users and update their Role assignments as needed.

Divisions

Users with the Create and Manage Divisions right can create Divisions to group users within the organization.

Note: You can only create a new division if there is a user available to serve as the Division Manager. Each User can only serve as the manager for one division.

Create a Division

1. Navigate to User Management > Manage Users > Divisions

2. Click Edit to turn on edit mode.

3. Name the Division and select a user to be the Division Manager

4. Click Save. This will trigger a reset of the Divisions Manager's user rights. Remember to re-define the user rights for the newly appointed Division Manager.

Default Users

This page allows the super user to manage a specific user account to receive all email alerts related to sourcing events to which your organization is invited, and to manage activities in those events on behalf of your organization.

The super user can set default users for the following:

- Auctions

- RFIs/RFQs

- Contracts

- Opportunity Emails

- Scorecard Surveys

- Development Plans