

CHAINIQ

JAGGAER ADVANTAGE

SUPPLIER USER HANDBOOK

PRODUCT VERSION 19.2



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Welcome

<https://sourcing.chainIQ.com/esop/guest/login.do>

Objectives

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

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

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 rights 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 **Administrator's Handbook**.

RFX

- Visibility of RFX Lists
- Access RFX Details
- Create Response
- Modify Before Publishing
- Modify and Submit
- Contact Visible to Buyer
- Messages Management
- View Sensitive Data (including; attachments, response, pricing etc)

Auctions

- Visibility of Auction Lists
- Access Auction Details
- Access to Auction Monitor
- Participate
- Contact Visible to Buyer
- Manage Messages

Supplier Management

- Access Supplier Management

User Management

- Manage Users and Roles
- Manage Users, Roles, Users Lists and Divisions

File Sharing

- Access To Directories

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 and auctions
- **My Organization** - In this module, you can view and manage your profile and categories,
- **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

New suppliers must register on the platform to be considered for sourcing events. Suppliers can be activated immediately or conditionally after the registration 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. Access the URL link sent to you by Chain IQ: <https://sourcing.chainiq.com/esop/guest/login.do>
2. On the application login page, click **New Registration**. The Registration Data page opens.
3. 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 for completing the process.

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.

RFX

RFX is an umbrella term used to describe a buyer's request submitted to a group of suppliers as a set of questions. If suppliers choose to participate in the RFX event, they respond to these questions privately. The term RFX includes:

- **RFIs** (Requests for Information) are used to collect qualification and technical information from suppliers in order to evaluate the supplier base and to narrow the field of competition to qualified suppliers. Closed RFIs cannot be awarded, but they can be finalized and converted into RFPs.
- **RFPs** (Requests for Quotation) are used to collect detailed technical and commercial information from pre-qualified suppliers in the form of a private offer. Closed RFPs on the platform can be converted into auctions, or they can be awarded.

Note: Depending upon location, RFP may be called RFQ.

The behavior of each RFX is managed by the buyer. Buyers can configure the settings of an RFX, such as the response deadline and awarding strategy, to regulate how suppliers will participate in the event.

Buyers can choose from the following options for viewing supplier responses to an RFX:

- **Unsealed** - Responses can be viewed by buyers while the RFX is running.
- **Sealed (sequential)** - Responses remain hidden from buyers until the RFX deadline has passed.

Prepare and Submit RFX Response

Supplier responses can be configured within JAGGAER ONE, or by downloading the questionnaire in Excel format, completing it offline, and then importing the updated file to the JAGGAER ONE Platform.

Important: Sharing login credentials or multiple users working in the same user account from different web browser sessions or devices can lead to issues and is strongly NOT ADVISED. This behavior can create a concurrency error when the two users are making changes at the same time and may result in updates not being saved.

Prepare RFX Response

Step-by-Step

Note: The following steps cover responding to an RFP. The steps for responding to an RFI are identical.

1. Navigate to **Sourcing > RFP**.
2. Select one of the sub-menu items:
 - a. **My RFPs** - View the **Response Status** for each RFP and identify the RFPs that require action.
 - b. **RFPs Open to All Suppliers** - Filter or browse these lists of all RFPs that are publicly available.
 - i. Each RFP contains an **Express Interest** action button which moves the RFP to the **My RFPs** area.
 - ii. Once a publicly-available RFP has been moved to the My RFP area, you can view the RFP details, download buyer attachments, view and send messages, and submit a response.
3. Click the **Title** link to open the RFP. The RFP opens to the **My Response** page.
 - Along with the RFP and project titles and codes, the RFP header displays the closing date and supplier submission date. If the response date has passed, this information will be highlighted in yellow.
 - If the buyer has provided instructional attachments to the RFP, a link to the attachments is displayed above the RFP navigation. This link takes you to the **Buyer Attachments** area.

4. On the **My Response** page, you can choose to **Create Response** or to **Decline to Respond**.
 - Click **Create Response** to begin the response creation process.
 - If you choose to decline, you are presented with an optional field to enter details for declining.

Create Online Response

Step-by-Step

1. Navigate to the RFX and click **Create Response**.
2. A pop-up opens explaining the next steps. Click **OK**.
3. The first section of the response page is the **My Response Summary**. This section keeps track of your response progress based on the mandatory questions answered.
4. Click **Edit Response** to edit your response for each section. Some RFX have multiple sections while others have one.
5. Provide responses to the available questions. Mandatory questions are marked with a red asterisk.
6. Upon completion of a section, click **Validate Response** to ensure that all mandatory questions are answered and that the responses provided are in compliance with the required format.
7. Click **Save and Continue** to save. Alternately, click **Save and Return** to save and exit the current section and navigate back to the **My Response** page.

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.

Note: If you have questions regarding the types of questions and how to work with the Excel questionnaire, click **Help To Create & Import Your Response** for detailed instructions.

4. Open the Excel file locally and answer the questions. Cells for mandatory responses are color-coded yellow. Cells for optional responses are color-coded blue.
5. When done, save the file and return to the **Export/Import Response** page.

6. Use the **Choose File** look-up to select your file, then click **Import Excel** to upload your response.
 - The system will run a compliance check to ensure that there are no missing rows, invalid responses, or missing mandatory responses. If all validation checks pass, the file is uploaded. If not, you are prompted to correct the errors indicated by the system message and re-import the questionnaire.
7. Click **Save Changes** to save.

Submit Response

When the response is complete, you can publish your responses to the buyer organization by clicking **Submit Response** on the **RFP Details > My Response** page.

If any mandatory data is missing or invalid, a pop-up box will indicate the fields that must be corrected before the response can be submitted.

Step-by-Step

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 an RFX

Modify Response

Suppliers may edit and resubmit their responses at any time before an RFX's **Closing Date and Time**.

- To modify responses online, navigate to **RFP Details > My Response** and click **Edit Response**. When finished, you have the option to **Keep Changes** or to **Discard Changes**. Once all changes are complete, click **Submit Changes** to finalize the modifications.
- To modify responses offline, download the Excel questionnaire, update your responses, and then import the questionnaire into the system.

Delete Response

If the answer has not been submitted, you may delete their responses at any time before an RFX's closing date and time. If the answer has been submitted, you may delete their responses only during the first round of sealed RFX.

To delete your response, suppliers can navigate to **RFP Details > My Response** and click the **Delete Response** option in the **More [...]** menu.

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

Withdraw Response

After deleting a response, you have the option to withdraw from the RFX. To withdraw from the RFX, navigate to **RFP Details > My Response** and click **Decline to Respond**.

Suppliers that have withdrawn from the RFX can still submit responses any time before the RFX closing date and time. To return to the RFX response creation process, suppliers can navigate to **RFP Details > My Response** and click **Undo Decline**.

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.

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 an 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. Enter your message in 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).
- **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.

The My Categories page lists all of your categories and associated forms, their completion status, and assessment status (if the category is set-up for formal qualification).

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**. The selected categories are saved to your list of categories and you are returned to the My Categories page.

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/RFPs, 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**. A page for creating the new user opens.
3. Complete the **user details** fields. Mandatory fields are marked with a red asterisk.
4. Click **Save** to create the new user account.

The user will receive a system generated email with their login information. 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 switch to edit mode.
5. Amend the user rights in each module by selecting the relevant options from the dropdown lists.
6. There are typically three levels of access you can select for each user right:
 - 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. Click **Save** to save the updated 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**. A page for creating the user role opens.
3. Enter a **role name**. It must be unique within the organization.
4. Select yes or in the **Shared Role** dropdown. This determines whether the role is visible and selectable by all divisions
5. Amend user rights for the role as needed.
6. Click **Save**. The new user role is created.

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

Step-by-Step

1. Navigate to **User Management > Manage Users > Divisions**.
2. Click **Create**. A page for creating the new division opens.
3. Enter a **name** and **description** for the division.
4. Select a user to be the **division manager**.
5. 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/RFPs