Jaggaer 2019 Training Guide Profile

24 May 2019

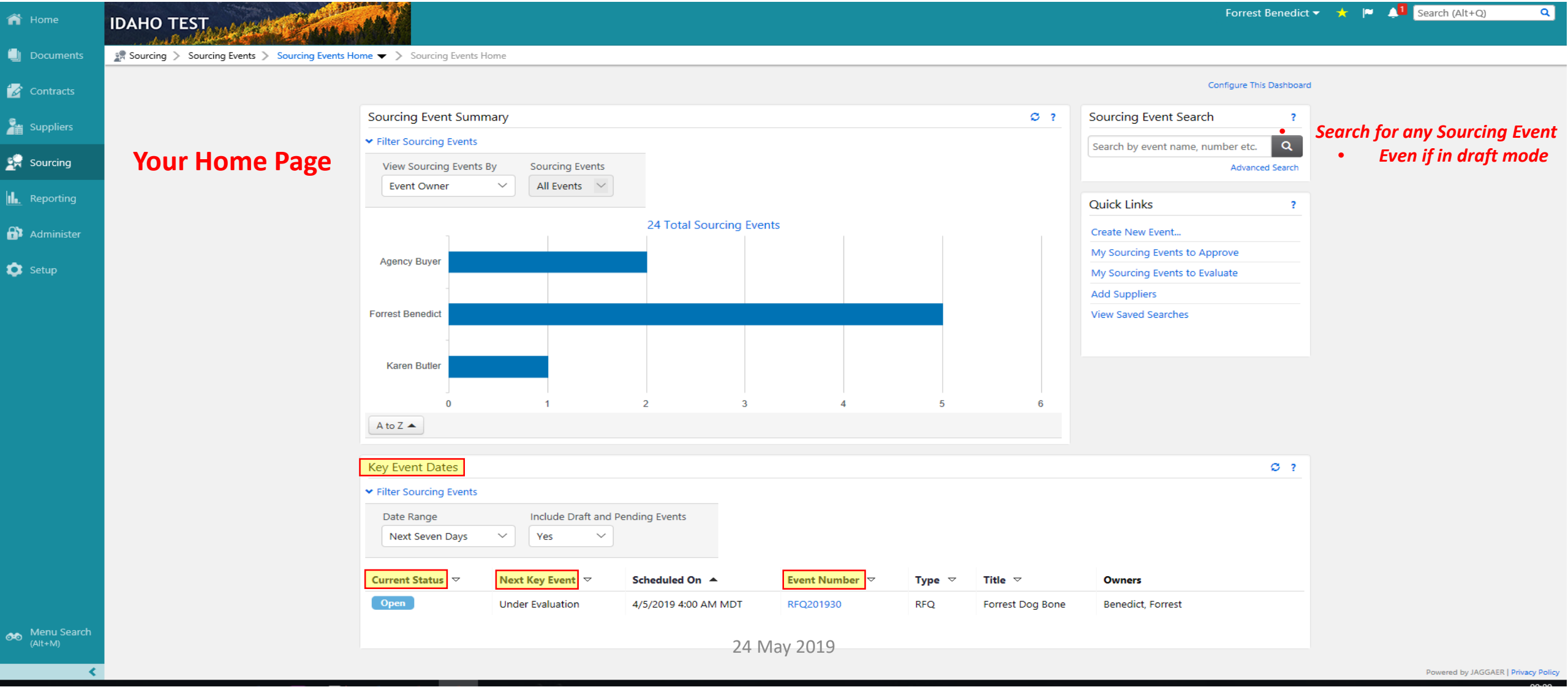
How to check your profile

- This is your default Home Page
- From here you can see the status of all your sourcing events (Solicitations).
- Under **Key Event Dates** you will see the **Current Status** of your Sourcing Events and the **Next Key Event** to happen
- By selecting the solicitation number under **Event Number** you can open-up your solicitation
- **Bolded** items reference items on the page
- Page heading tells you what task you are performing
- Unless other wise mentioned all task were performed using Microsoft Edge and Office 360

- Arrows or numbers show where to click

- Click "Save Changes" to save your work (stays on page) or "Next" to save and move to the next screen

- Following the numbers in sequence will help you navigate through the process

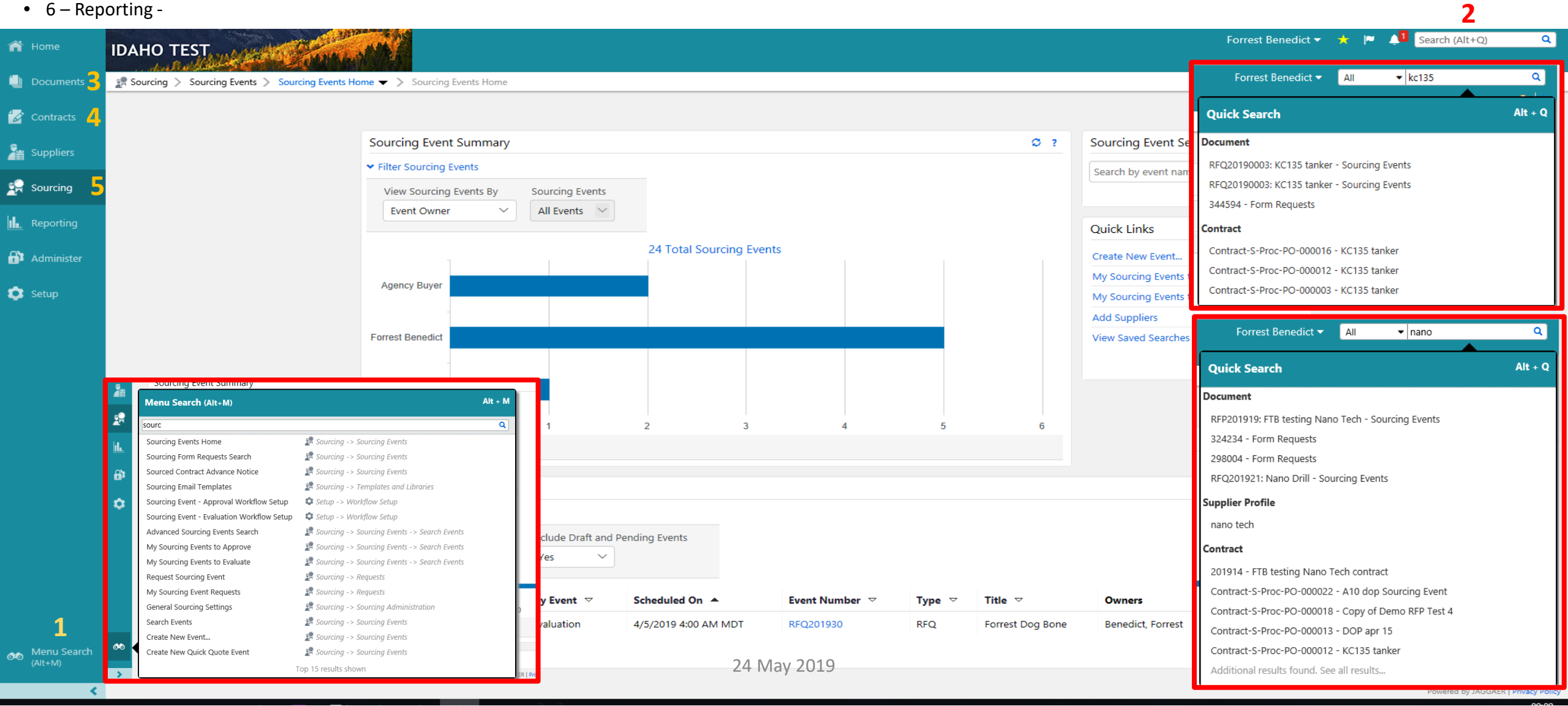


Your Home Page

Search for any Sourcing Event
- ***Even if in draft mode***

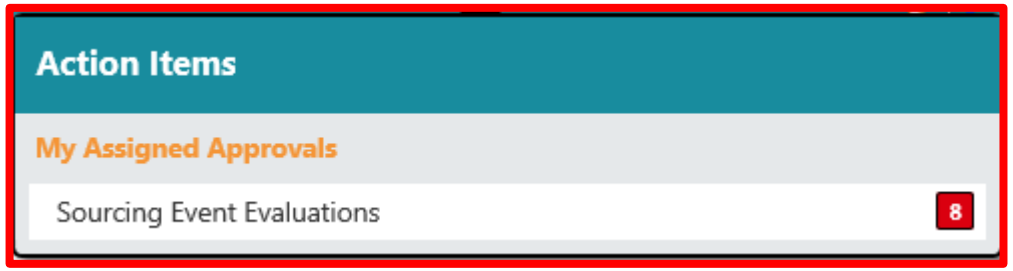
Your Home Page

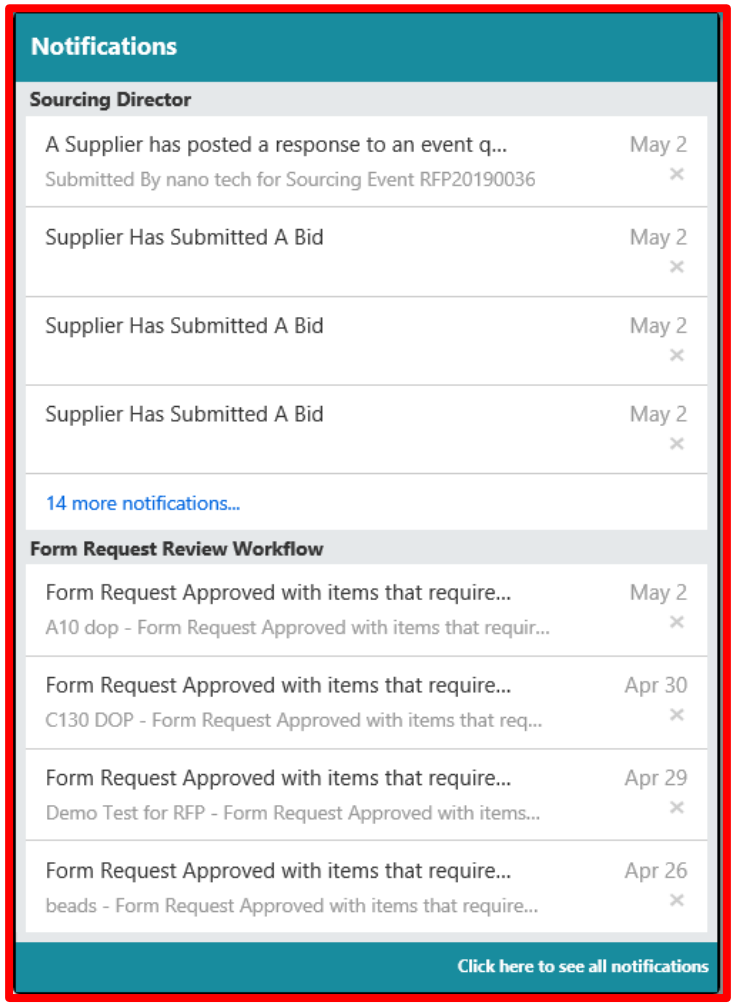
- 1 – **Menu Search**
  - Specific screens and functions
- 2 – **Quick Search**
  - Search Documents, Supplier Profiles, Contracts
- 3 – **Documents** – My Approvals – Search Documents, Assign Substitute Approvers
- 4 – **Contracts** -
- 5 – **Sourcing** – Create/Submit Request
- 6 – Reporting -



Your Home Page

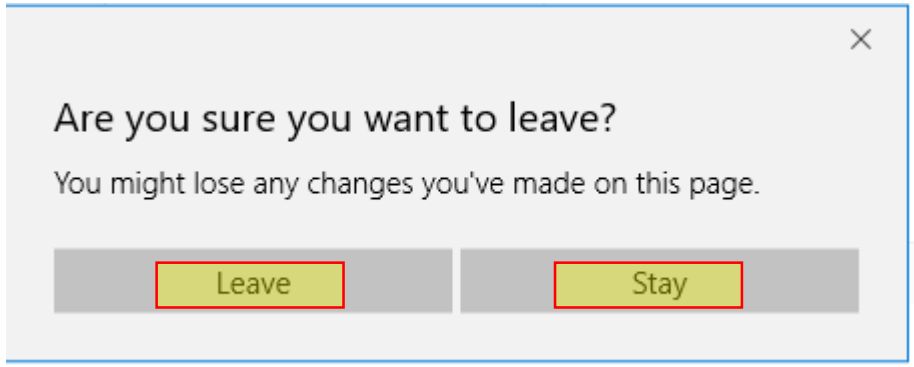
- 1 – **Favorites** – Add bookmarks for quick reference (to add a bookmark, be on the page – click Favorites – select "Book Mark this Page"
- 2 – **Action Items** – Task require action on your part, ie approvals
- 3 – **Notifications** – Alert activity has taken place, requires attention
    - Dependent on your Notification Preferences, may or may not show up here
- All item are clickable





Note

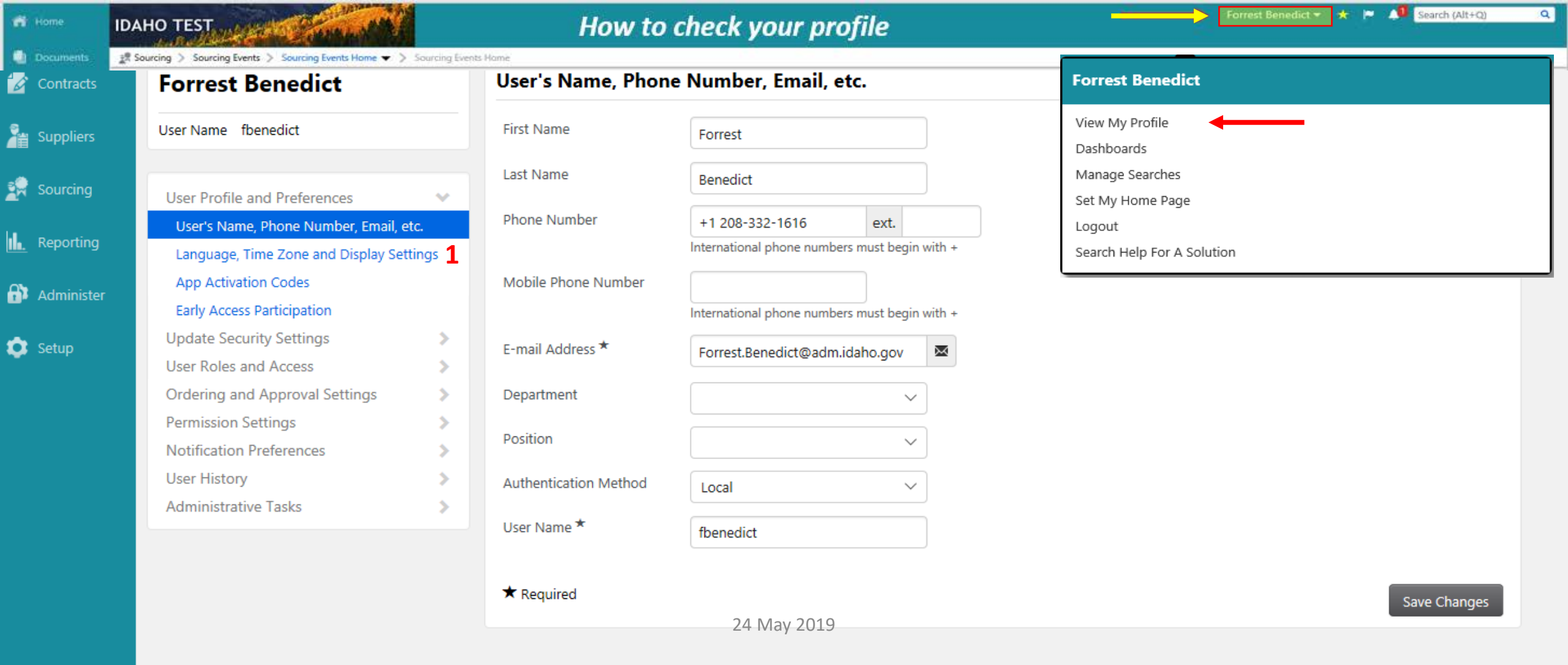
- If you see this popup it means you haven’t saved your work
  - Click **Leave** to leave page and discard any changes
  - Click **Stay** to go back to your previous page and than save your work



- You can check your Profile found under your name at the top right of the page
- Make sure the information reflects your current job

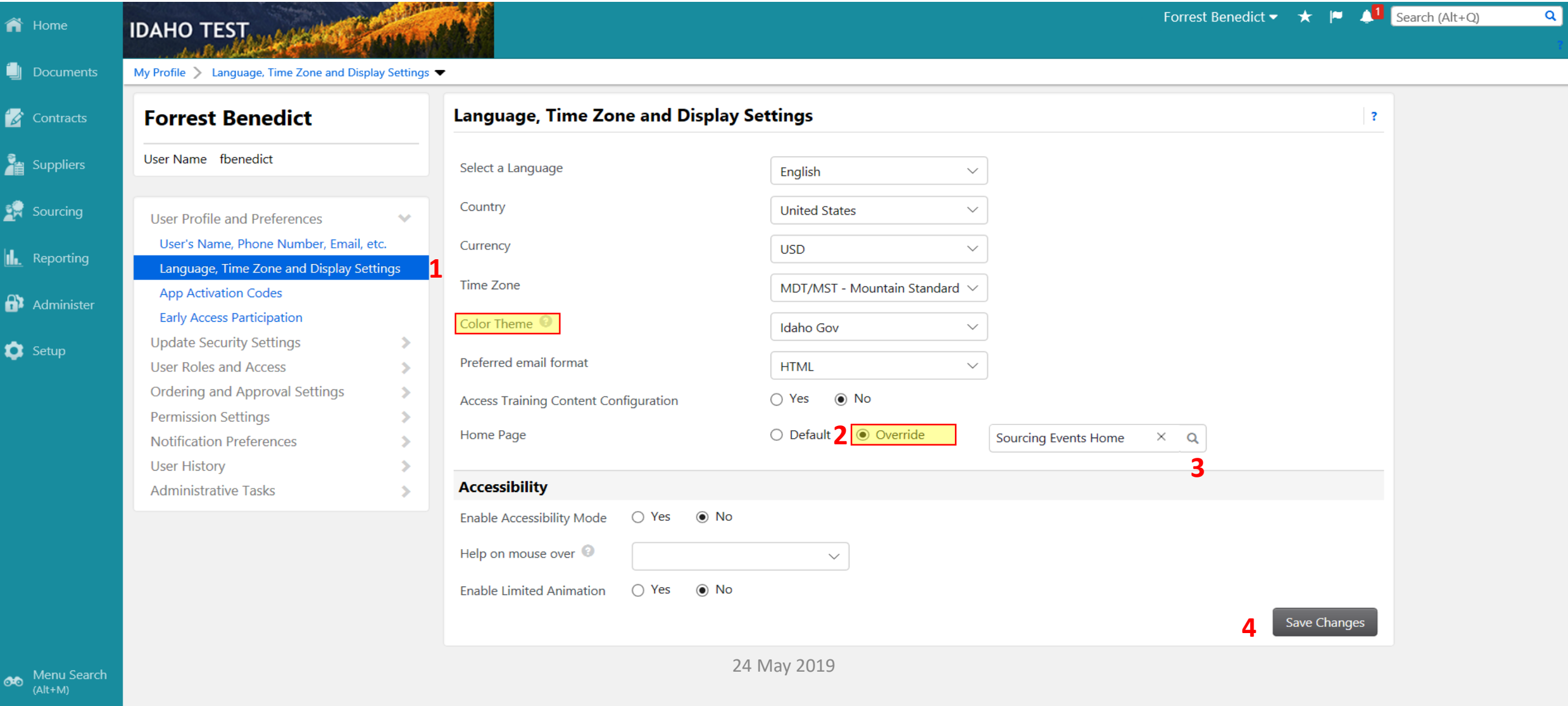
Remember to Save Changes
Click on 1 when done

How to check your profile



How to change your home page

- Check your information, make sure it's correct
- You can change your **Color Theme** (the color scheme of your pages)
- If you don't like your Home Page you can **Override** it here, follow numbered sequence



Change your Notifications

- You can change when you get notifications and the type of notifications
- Follow number sequence to view notification settings and to change them
- After selecting **Edit Section** this page will change to allow edits

Home
Documents
Contracts
Suppliers
Sourcing
Reporting
Administer
Setup

IDAHO TEST

My Profile > Notification Preferences > Sourcing Director

Forrest Benedict

User Name fbenedict

User Profile and Preferences
Update Security Settings
User Roles and Access
Ordering and Approval Settings
Permission Settings
Notification Preferences 1
Administration & Integration
Shopping, Carts & Requisitions
Contracts
Sourcing Director 2
Supplier Management
Form Requests
User History
Administrative Tasks

Notification Preferences: Sourcing Director

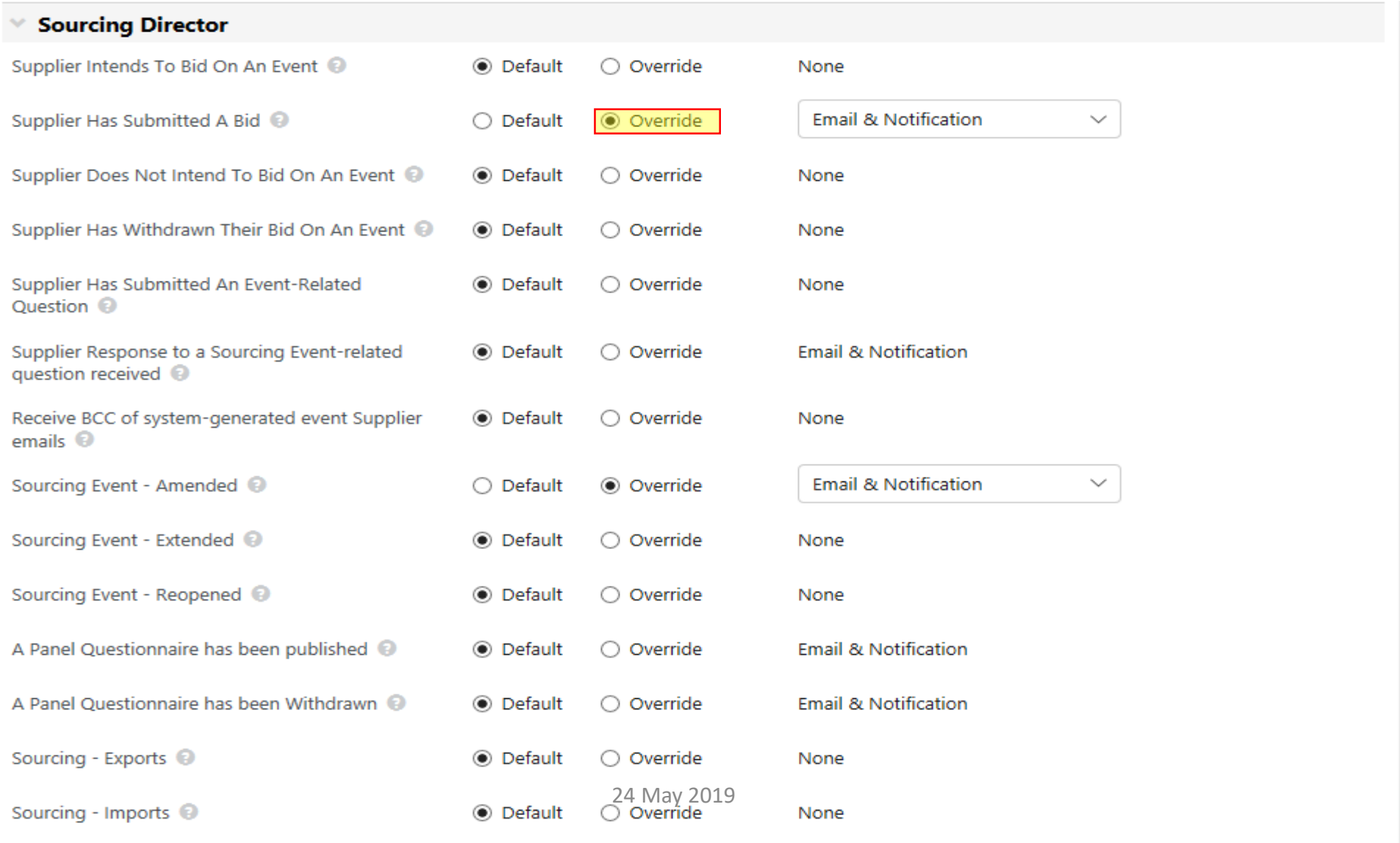
The in-application notifications are not yet available for all Email Notifications.

Sourcing Director Edit Section 3

Supplier Intends To Bid On An Event	None
Supplier Has Submitted A Bid	Email & Notification
Supplier Does Not Intend To Bid On An Event	None
Supplier Has Withdrawn Their Bid On An Event	None
Supplier Has Submitted An Event-Related Question	None
Supplier Response to a Sourcing Event-related question received	Email & Notification
Receive BCC of system-generated event Supplier emails	None
Sourcing Event - Amended	None
Sourcing Event - Extended	None
Sourcing Event - Reopened	None
A Panel Questionnaire has been published	Email & Notification
A Panel Questionnaire has been Withdrawn	Email & Notification
Sourcing - Exports	None
Sourcing - Imports	None
Sourcing - Validation	None
Evaluation Calculation Options Change	None
Sourced Contract Advance Notification	Email & Notification

Menu Search (Alt+M)

- Select **Override** and pick the type of notification you want to receive
  - Choices are: Email, Notification, or Email & Notification
- Make sure you Save Changes
- If you can't edit another section it's because you haven't saved the previous changes
  - Selecting Save or Cancel will close out the editing screen and put you into view mode



Sourcing Director

Supplier Intends To Bid On An Event	Default	Override	None
Supplier Has Submitted A Bid	Default	Override	Email & Notification
Supplier Does Not Intend To Bid On An Event	Default	Override	None
Supplier Has Withdrawn Their Bid On An Event	Default	Override	None
Supplier Has Submitted An Event-Related Question	Default	Override	None
Supplier Response to a Sourcing Event-related question received	Default	Override	Email & Notification
Receive BCC of system-generated event Supplier emails	Default	Override	None
Sourcing Event - Amended	Default	Override	Email & Notification
Sourcing Event - Extended	Default	Override	None
Sourcing Event - Reopened	Default	Override	None
A Panel Questionnaire has been published	Default	Override	Email & Notification
A Panel Questionnaire has been Withdrawn	Default	Override	Email & Notification
Sourcing - Exports	Default	Override	None
Sourcing - Imports	Default	Override	None

How to Change your Password

- If you need to change your password follow the above instructions
- Click on the **Home** icon in the upper left to go back to your home page

Home 3
Documents
Contracts
Suppliers
Sourcing
Reporting
Administer
Setup

IDAHO TEST

My Profile > App Activation Codes

Forrest Benedict

User Name fbenedict

User Profile and Preferences
Update Security Settings 1
Change Password 2
Change Security Question or Answer
User Roles and Access
Ordering and Approval Settings
Permission Settings
Notification Preferences
User History
Administrative Tasks

App Activation Codes

Use the Add Device button below to generate a new activation code and start the registration process to gain access to the Microsoft Word app. You will be required to enter a Device Name (i.e. computer name, etc) to help identify the device being registered.

Add Microsoft Word

Manage Devices

Device Nam	Date	
ADM12LOAN	27:15 PM	Delete

Change Password

Change Password - User: fbenedict (Forrest Benedict)

Passwords are case sensitive. The minimum password length is 6 alphanumeric characters.

Old Password

New Password

Confirm New Password

Change Password Close

Your Home Page

IDAHO TEST

Forrest Benedict | Search (Alt+Q)

Home
Documents
Contracts
Suppliers
Sourcing
Reporting
Administer
Setup
Menu Search (Alt+M)

Sourcing > Sourcing Events > Sourcing Events Home > Sourcing Events Home

Configure This Dashboard

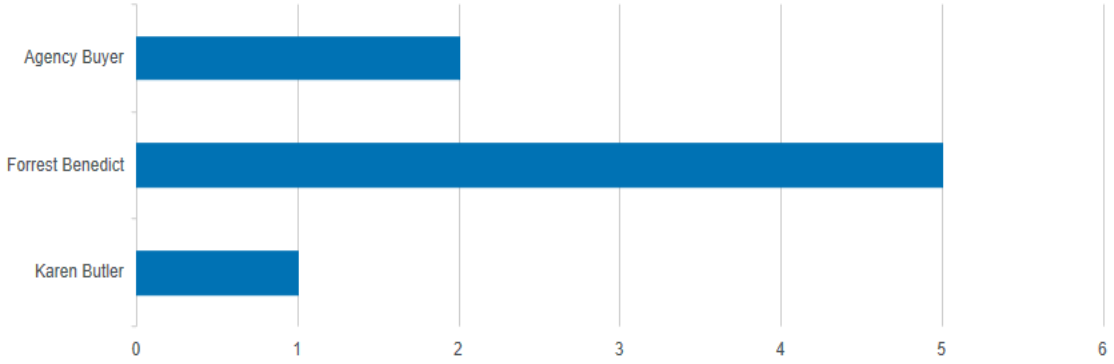
Sourcing Event Summary

Filter Sourcing Events

View Sourcing Events By: Event Owner

Sourcing Events: All Events

24 Total Sourcing Events



A to Z

Sourcing Event Search

Search by event name, number etc.

Advanced Search

Quick Links

- Create New Event...
- My Sourcing Events to Approve
- My Sourcing Events to Evaluate
- Add Suppliers
- View Saved Searches

Key Event Dates

Filter Sourcing Events

Date Range: Next Seven Days

Include Draft and Pending Events: Yes

Current Status	Next Key Event	Scheduled On	Event Number	Type	Title	Owners
Open	Under Evaluation	4/5/2019 4:00 AM MDT	RFQ201930	RFQ	Forrest Dog Bone	Benedict, Forrest

24 May 2019

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