

JAGGAER ADVANTAGE

SUPPLIER USER HANDBOOK

PRODUCT VERSION 20.2



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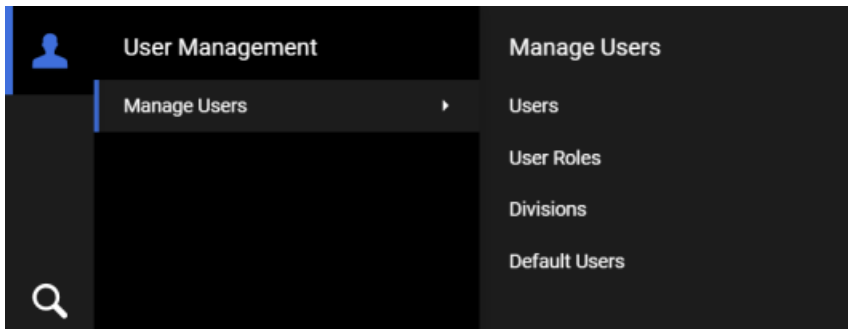
USER MANAGEMENT

MANAGE USERS

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 RFX, Bid Collectors, Auctions, Contract Management, Supplier Management, Supplier Performance, Development Actions, User Management and File Sharing (if activated by the buyer organization). 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

Only users with **Manage Users** right can create a user account. The "Superuser" has this right by default.

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.

Two shortcuts are available (**Set Full Rights** and **Set Minimum Rights**) when editing the user rights in order to set all the permission to the maximum value and minimum value for all rights or a particular section.

Check User Status

Step-by-Step

1. Navigate to **User Management**  > **Manage Users > Users**.
2. Open the drop-down menu (Enter Filter) next to the **Filter By** option.
3. Select **User Status** option from the drop-down.
4. Select **Active / Deactivated** option and click on **Search**.


5. The list of users will appear according to your search.

User Roles

Users with the **Manage Roles** or **Manage Users, Roles, User Lists and Divisions** right can group user rights into roles, to quickly apply to users who require the same access configuration. **Note:** The "Superuser" has this right by default. 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.
Note: Two shortcuts are available (**Set Full Rights** and **Set Minimum Rights**) when creating a role in order to set all the permission to the maximum value and minimum value for all rights, or a particular section.
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 **Manage Users, Roles, User Lists and Divisions** right can create Divisions to group users within the organization. **Note:** The "Superuser" has this right by default.

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/RFQs
- Bid Collectors
- Contracts
- Opportunity Emails
- Scorecard Surveys
- Development Plans






Delete Users

Depending on the organization's configuration (if this features is available), users with the **Delete Deactivated Users** right can delete the deactivated users. **Note:** The "Superuser" has this right by default.

This permission will be available only to users belonging to the division of the Superuser.

Delete a User

Step-by-Step

1. Navigate to **User Management**  > **Manage Users** > **Divisions**.
2. Deactivated users are identified with  icon. Select the user that should be deleted:
 - If the user is not deactivated yet, click the  button and choose **Deactivate User** option.
 - Mark the checkbox and click **Confirm**.
 - If you wish to reactivate the user, click the  **Activate User** button when accessing the **User Details** page.
3. Click the  button and choose **Delete User** option.
4. Mark the checkbox and click **Confirm**. The deleted user will be removed from the system.