



SRM Profile Creation

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The JAGGAER Supplier Relationship Management (SRM) module supports easy onboarding of suppliers in the Supplier Portal through supplier completed questionnaires. Supplier data and contacts all in one accessible place, with suppliers managing and maintaining their own data in JAGGAER.

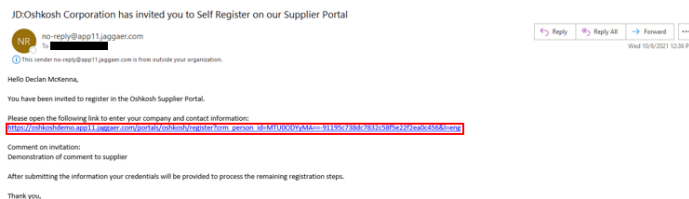
This job aid covers the following scenarios:

Page #	Scenario
1	New supplier is invited to portal and onboards
7	Supplier who has been onboarded for RFQ participation is fully onboarded to receive POs

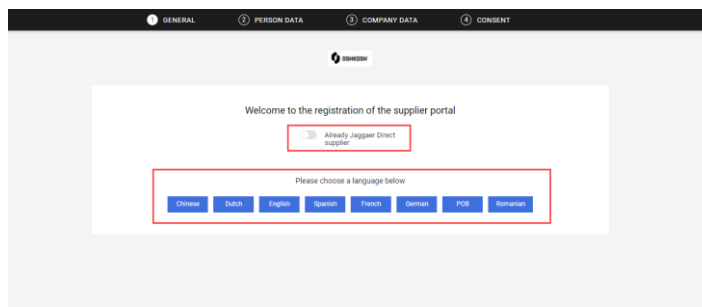
Instructions

Suppliers will use this Job Aid to perform the steps to create their company profile in the JAGGAER Direct Supplier Portal.

1. Click the **Link** in the registration email from the JAGGAER system.



2. If you have used JAGGAER before and have a profile with another company, select **“Already Jagger Direct supplier”**.
3. Select the **Language** you would prefer to use for the supplier portal.





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4. Complete and verify your **Contact Information**. Fields marked with an * are mandatory. Oshkosh recommends entering the first part of your email for your login name. (joe.smith@example.com = joe.smith)
5. Click **Continue**.

Website URL
http://www.oshkoshcorp.com

CONTACT PERSON

Salutation
Mr

First name*
Austin

Last name*
Price

Department
...

Telephone*
+ 1-US 920 4795992

Mobile
+ -- Area Number

Logname*
aprice

E-Mail*
aprice@oshkoshcorp.com

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6. Complete your **Company Data** information. Fields marked with an * are mandatory.
 - a. Note that fields can be auto populated by using the D&B Lookup feature after the Company Name, Country and State/Province is entered. Click the **D&B Lookup** button at the top of page.
7. Click **Continue**.

D&B Lookup

COMPANY DATA

Company name*
DUN'S BRADSTREET INC.

Company name 2

Street*
101 JOHN F KENNEDY PARKWAY

Street 2

City*
SHORT HILLS

Country*
United States of America

State / Province
Louisiana

Zip code*
70782716

Telephone
+ -- Area Number

Homepage
Including http://

Currency
...

DUNS ID
150483782

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8. Review and check **Agree to Supplier Access Terms**.
9. Review and check **Agree to JAGGAER Supplier Network conditions**.
10. Click **Accept and Submit**.


11. Check your inbox for an email providing you with your login name and instructions to set a password.

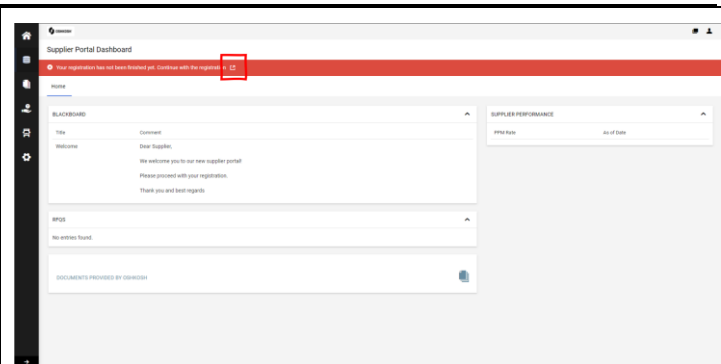
12. Password should meet the following criteria:
 - Minimum of 8 characters
 - Minimum of 1 of the following character: !@#\$%^&*()?
 - Minimum of one number
 - Minimum of one alphabetic character

13. Login with your credentials.

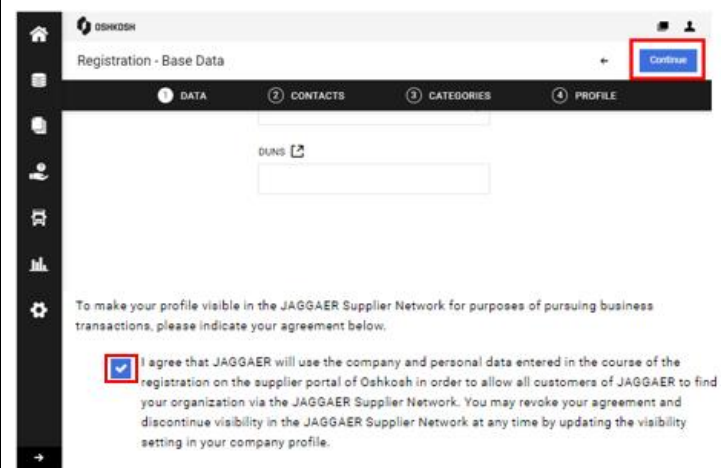


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14. Click the  to the right of “Your registration has not been finished yet. Continue with the registration.” Continue with the registration.”



15. Scroll to the bottom and click the **checkbox** to agree to JAGGAER Supplier Network conditions.
16. Click “Continue” on the top right corner.





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17. Click the icon to add additional users that will access the account.

- a. Fill out all the following mandatory fields:
 - First name
 - Last name
 - Telephone
 - E-Mail
 - Portal Access (Toggle switch to blue)
 - Login name – Oshkosh recommends entering the first part of the contact’s email. (joe.smith@example.com = joe.smith)
 - Permissions (Make sure this is checked)
- b. Click **Save**.
- c. Inform the new user that they will receive an email from Jaggaer with login instructions.

18. To update Assigned Roles, click on the icon.

Note: Effects of certain roles listed below:


- Sourcing –Preferred contact(s) for receiving RFQs
- Profile – Receive notifications related to supplier profile
- Order Confirmation – Contact will be assigned to orders as responsible and will receive order notifications
- Company President – No effect
- Payment – No effect
- Defense Sourcing Contact – RFQs from Oshkosh Defense will be sent to this contact by default

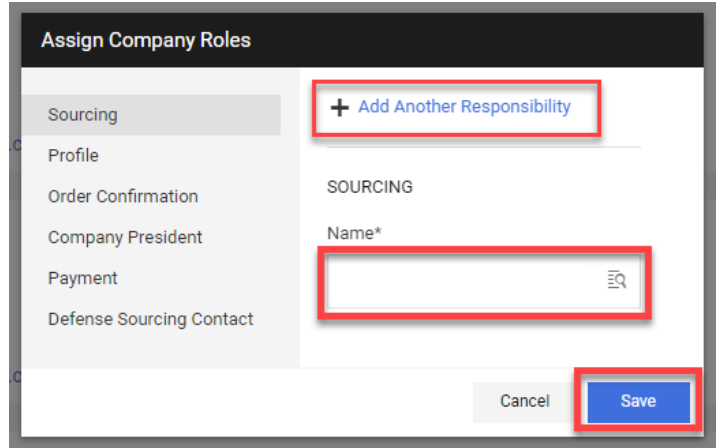
Note: More than one user must be registered to change assigned role.


The screenshot displays the SRM Profile Creation interface. The top section, titled 'Registration - Contacts', shows a grid of assigned roles for a contact named 'Price Austin'. The roles include Sourcing, Profile, Order Confirmation, and Company President. The bottom section, titled 'Add New Contact', shows a form for creating a new contact. The form includes fields for First name, Last name, Telephone, Mobile, E-Mail, Portal Access (toggled on), Loginname, and permissions (checked for Oshkosh Supplier Portal ACL).

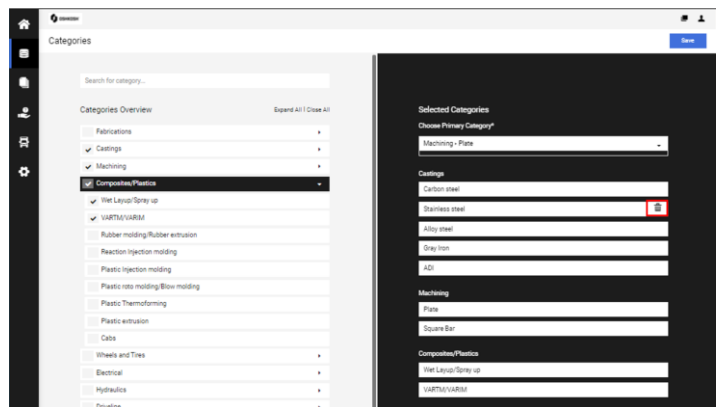
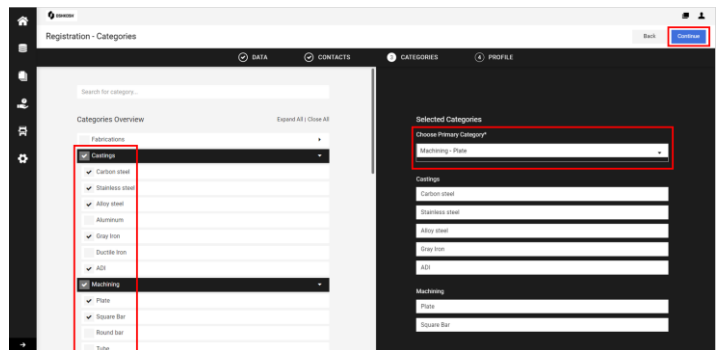


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19. After clicking the  icon, the **Assign Company Roles** box will appear.
20. **+ Add Another Responsibility** can be used to add additional users to a role. Start typing in the **Name*** field to search for a user, then click to select. Multiple users can be added at once to the Sourcing, Order Confirmation and Payment roles in the pop up.
21. Click **Save**.
22. Confirm all roles are assigned to the appropriate user.
23. Once all roles are assigned and confirmed, click **Continue**.



24. Use the **Checkboxes** on the left to select categories that represent your core business.
25. Use the arrow on the right of the category to select/deselect sub-categories.
26. All categories selected on the left-hand side, appear in the drop-down on the right-hand side. Select your **Primary Category** even if you have multiple. Any category that is not selected as a Primary Category will automatically be considered a "Secondary Category". Oshkosh buyers will see all Secondary Categories you supply listed next to your Primary Category and be able to sort and filter on these.
27. To deselect categories, hover over a Selected Category and click the  icon, or uncheck boxes in the category overview.
28. Click **Continue**.





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29. Complete the **Registration – Profile**. Mandatory fields are denoted with an *. There are multiple tabs that will have to be completed:

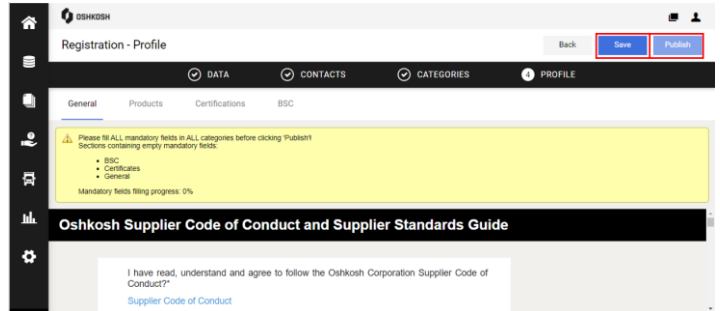
- **General**
- **Products**
- **Certifications**
- **BSC (Business Status Classification)**.

Before switching tabs, click **“Save”** at the top right corner.

Note: If you are being fully onboarded for PO, you will also see a **FFATA** tab. This is only required if you are working with the Defense segment.

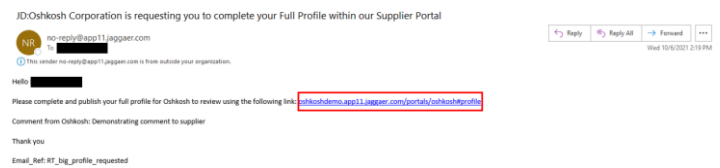
30. After completing all tabs, click **“Publish”** at the top right corner.

31. Oshkosh will review your profile and approve. If corrections are needed, an email will be sent requesting the necessary changes.



Continue here if you have been onboarded for RFQ and are now being invited to onboard for PO at a later time.

32. Click **The Link** in the email to complete your full profile.




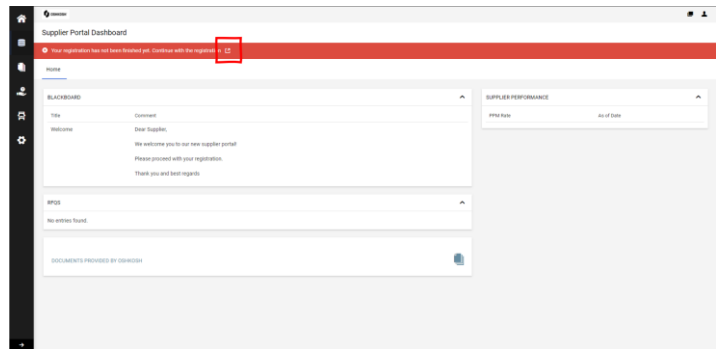
33. Log in to the Oshkosh supplier portal.





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34. Click the  to the right of “Your registration has not been finished yet. Continue with the registration.”



35. Complete the **Registration – Profile**. Mandatory fields are denoted with an *. There are multiple tabs that will have to be completed. These are **General**, **Products**, **Certifications**, **BSC** and **FFATA** tabs. Before switching tabs, click **Save**. Additional fields will display in the **General** tab that were not there during initial onboarding.

Note: **FFATA** is only required if you are working with the Defense segment.

36. After completing all tabs, click **Publish**.

37. Oshkosh will review your profile and approve. If corrections are needed, an email will be sent requesting the necessary changes.

