Creating New Supplier Users

SSE Portal on Jaggaer

Support & Assistance

- Access to online help can be found through your profile icon at the top right of the screen when logged in .
- Should you need help with setting up new users, permissions or user roles, the Jaggaer Supplier Helpdesk are available to support.
- Support links and telephone numbers can be found below and on the SSE Portal landing page at https://sse.app.jaggaer.com

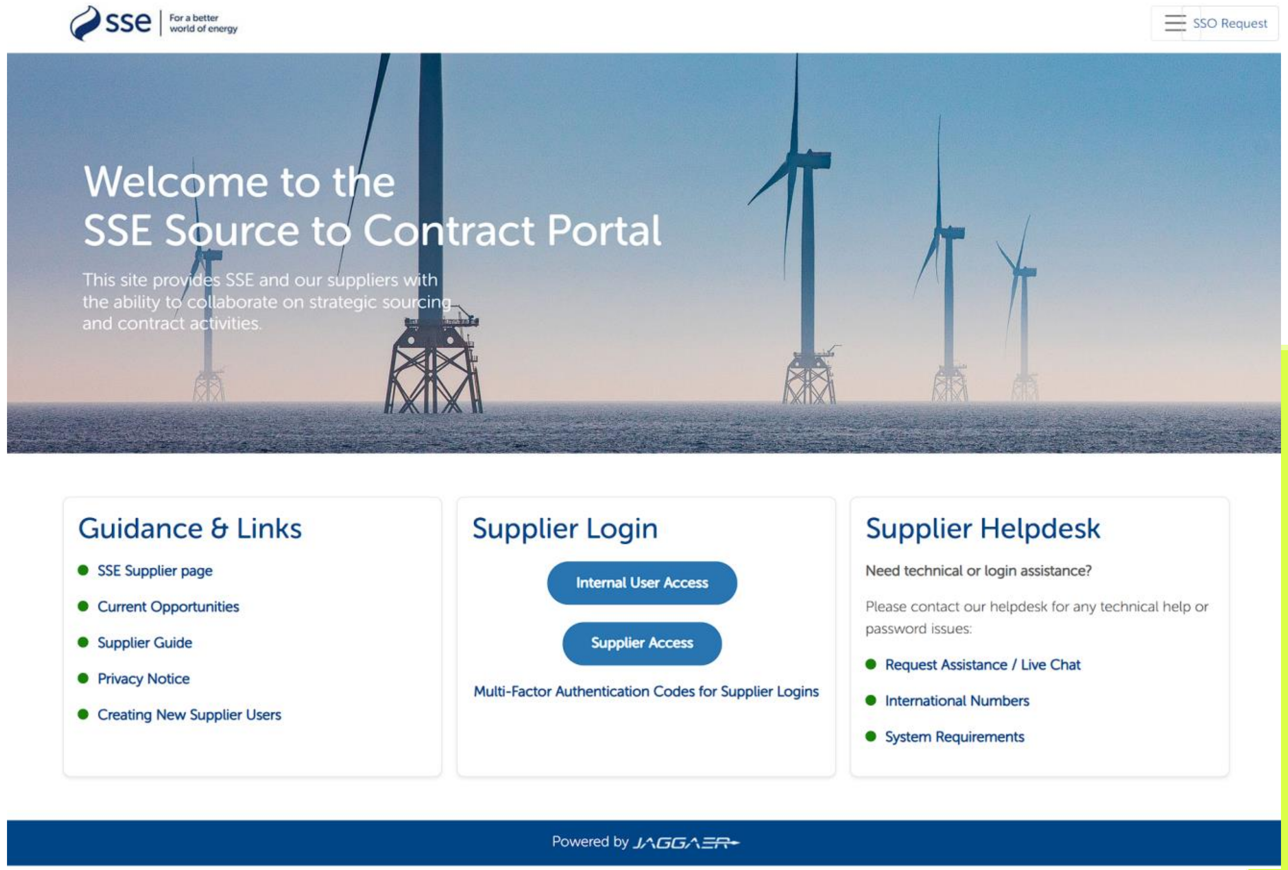
- Helpdesk Telephone Numbers: https://www.jaggaer.com/support/phone-numbers/
- Submit a Supplier Support Ticket - https://www.jaggaer.com/submit-supplier-support-request/

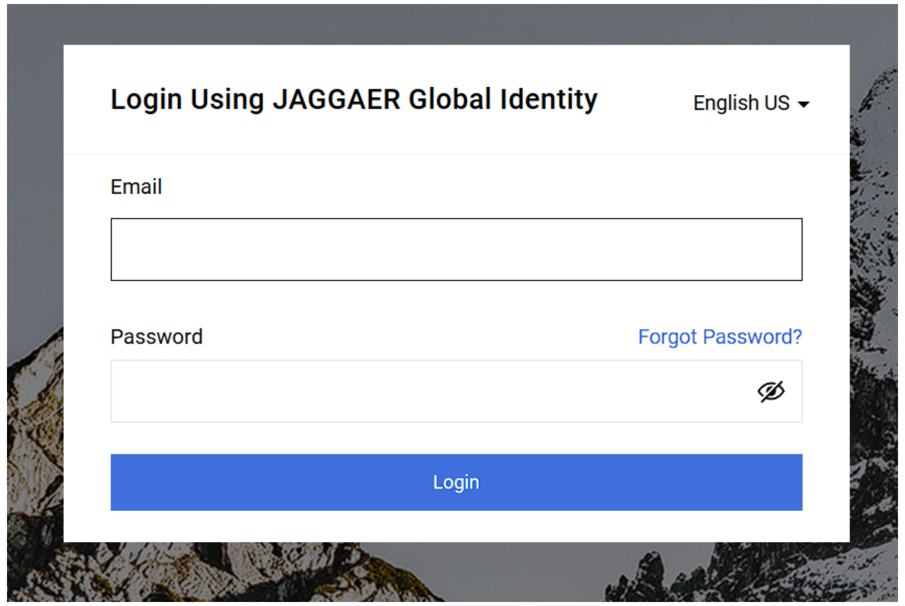
- For security reasons, SSE are unable to add, edit or delete users within a supplier profile.
- All user changes need to be made by the supplier's listed Main User (or a delegate who has been granted User Management permissions).
- The Main User can pass that role to another user registered in the profile and should do so in advance of leaving the supplier firm or before any period of extended absence.
- If the Main User has already left the firm, or is unavailable long-term, the Jaggaer Helpdesk can assign the Main User role to a new user after some identity checks.

- In the event of any IT access/website issues, please check the IT System Requirements below.
- https://sse.app.jaggaer.com/esop/common-host/public/browserenv/requirements.jsp

Existing Supplier Users: Logging Into the Portal

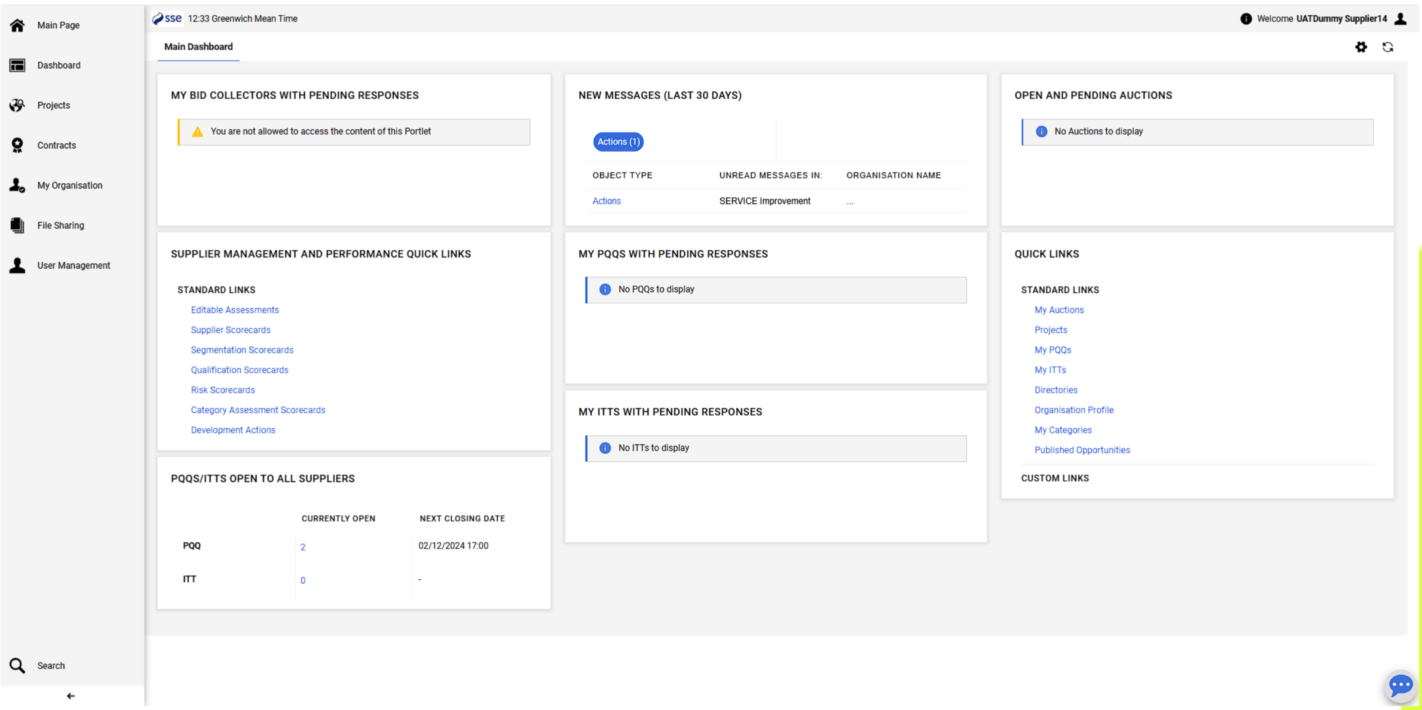
- Navigate to the SSE Portal homepage at https://sse.app.jaggaer.com
- Click the blue “Supplier Access” button.
- On the next screen enter your email and password details and click “Next” to log in.
- You may receive a multi-factor authentication code to your user email address – enter this code when prompted.
- Visit this site to learn more about 2 step verification: https://www.jaggaer.com/solutions/supplier-identity-management/

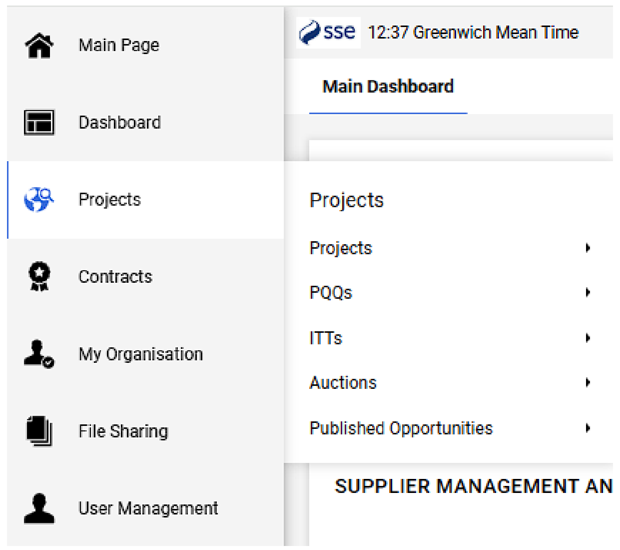


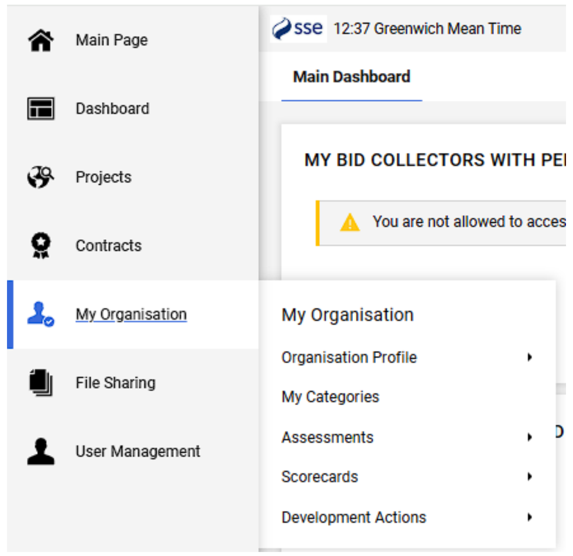


Supplier Homepage

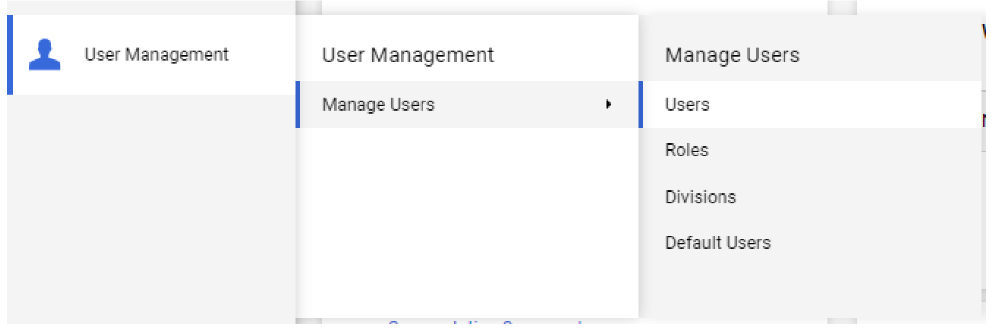
- The Portal homepage contains a main menu on the left and several widgets on the screen (these may vary from the picture shown, depending on site configuration)
- You can expand the left-hand menu using the arrow at the bottom to view text headings for ease of use.
- Access to PQQs/ITTs, auctions and supplier performance areas can be found in the widgets ,or in the “Projects” and “My Organisation” menu areas respectively.

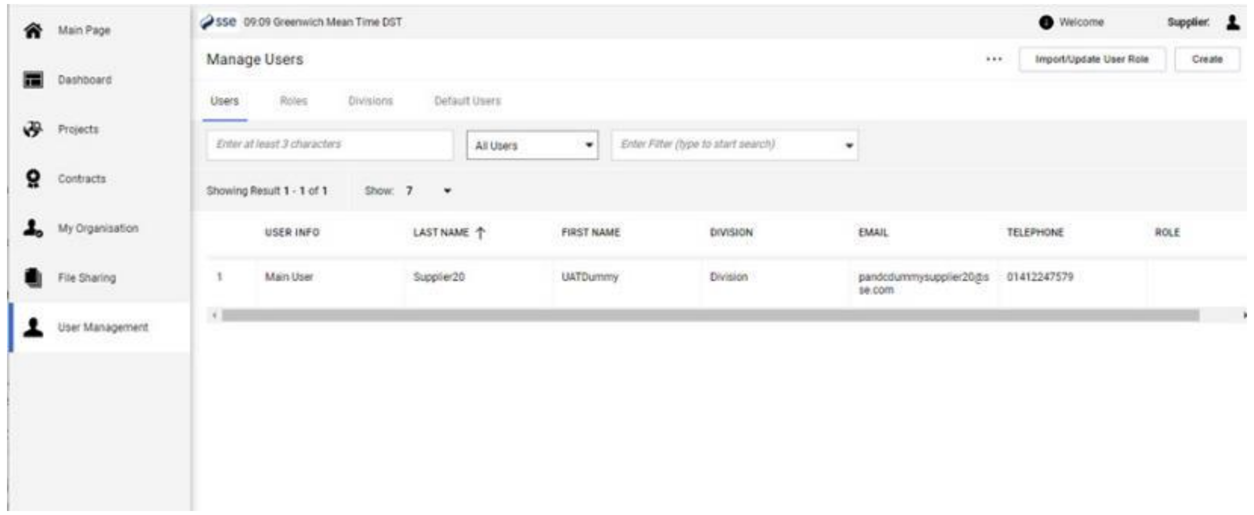


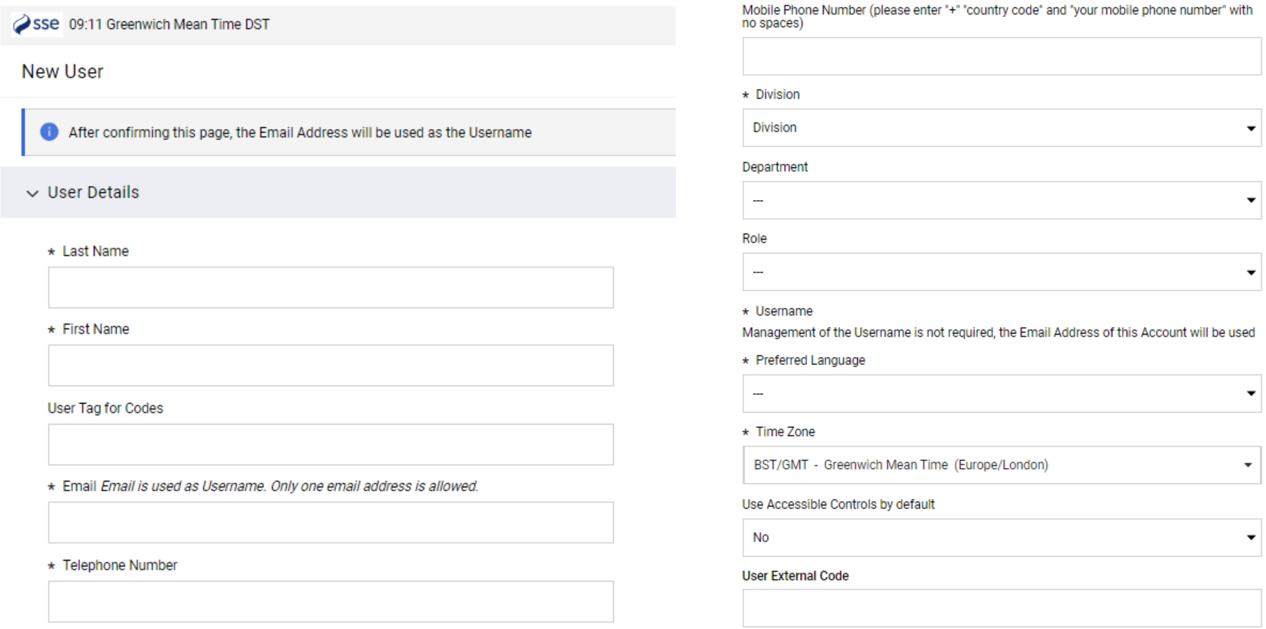




Supplier Main User: Add/Manage Users



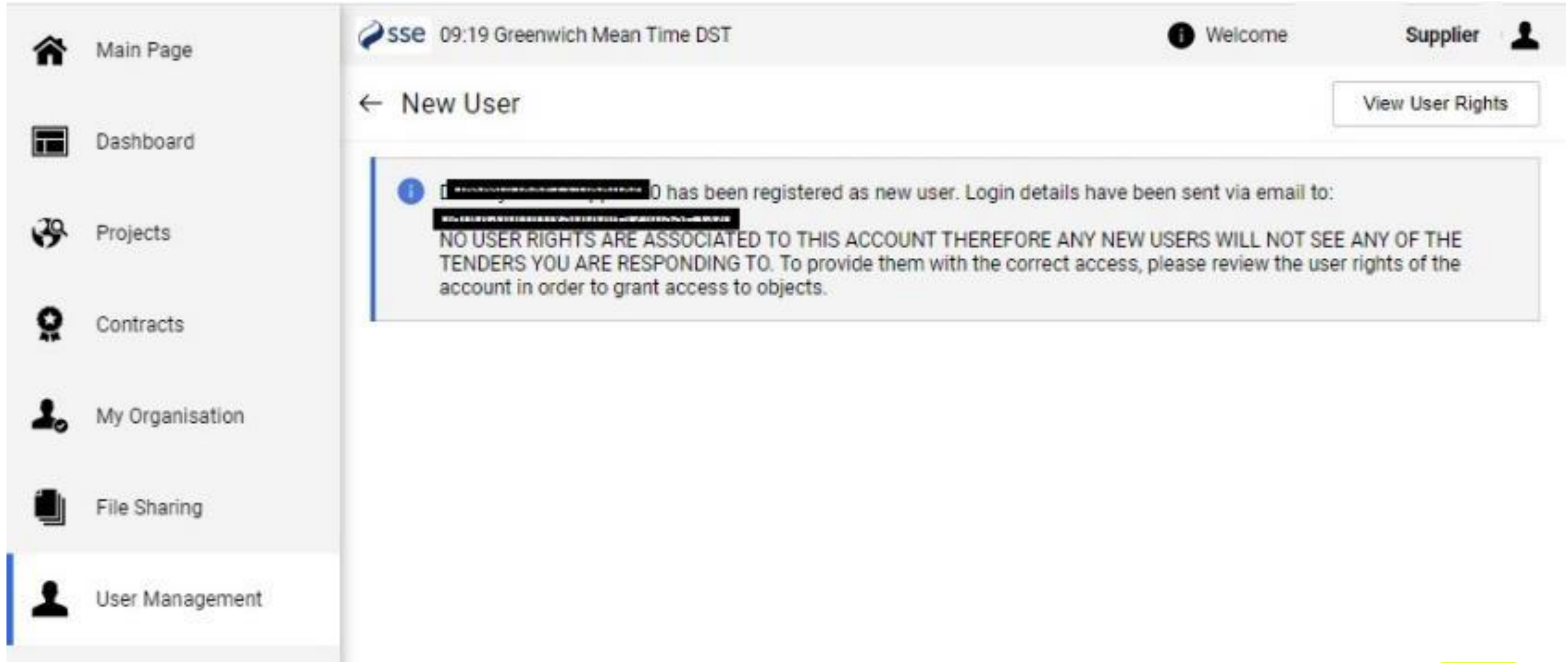




- Supplier Main Users can register additional people to their account and manage their access to different areas.
- Click “User Management” -> “Manage Users” -> “Users” to open the user list.
- Click the “User Management” menu icon, select “Manage Users” and “Users” to view a list of people in your company profile.
- To add a new user simply click the “Create” button at the top right of the screen.
- On the next “New User” screen enter the required user details in the mandatory fields (those marked with an asterisk).
- Each user email address <u>must be unique</u> as it will act as the Username for login.
- You can set the Accessible Controls to be on by default for any users who may require this.
- Other fields may be left blank or left with the default settings. If you have configured any Divisions or Departments (see later) you can assign the user to them if needed.

User Rights

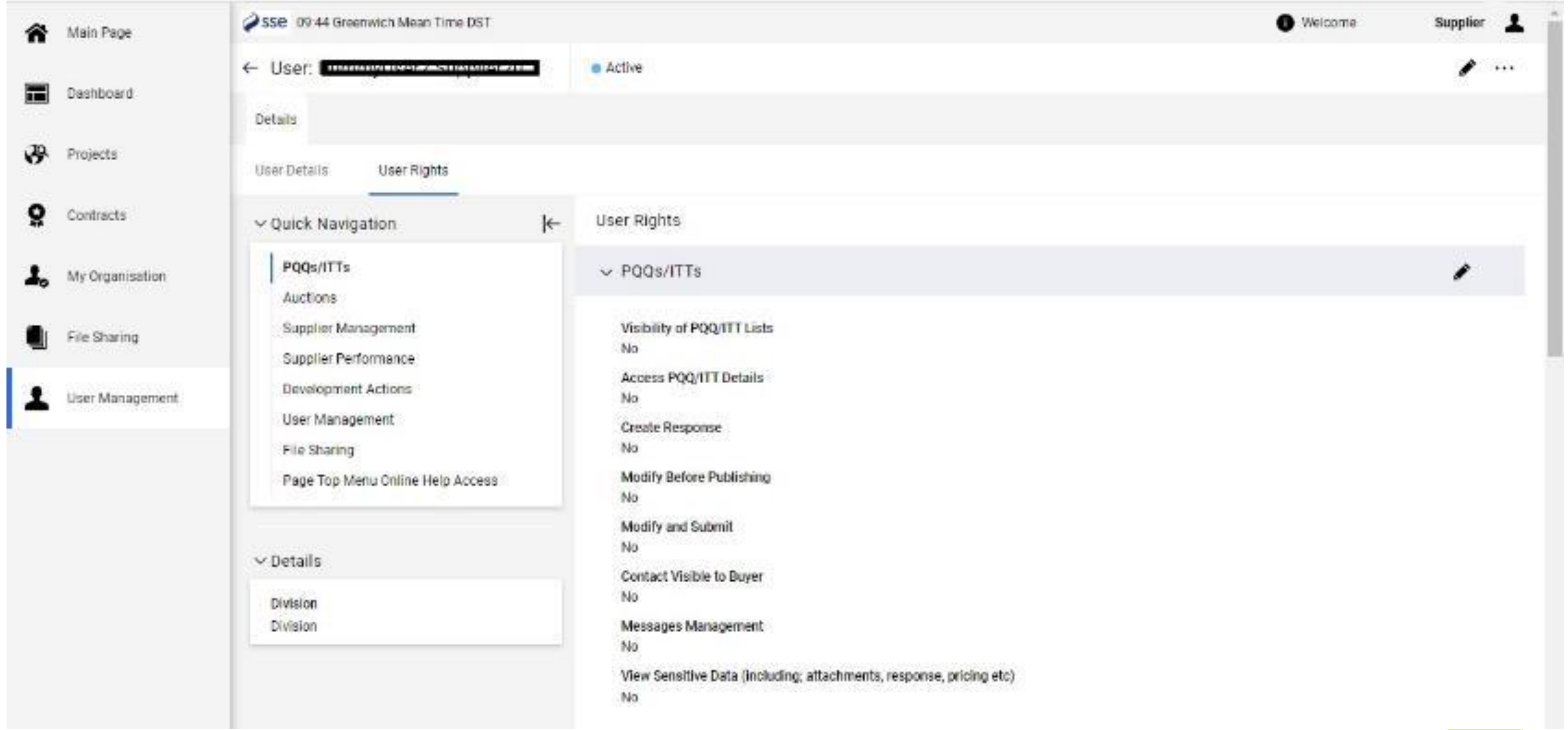
- Once the new user is added, you will see this reminder message stating that no user rights are granted automatically to the account (example shown on the right).
- For security reasons, new users added can log into the system but will not be able to access any of your content until the main user has granted them rights.
- These rights need to be added by clicking the “View User Rights” button at the top right of the screen, which open the screen on the next page.
- You can also access this next screen from the user profile page by clicking “Manage Users”, clicking the username, then click the “User Rights” tab.

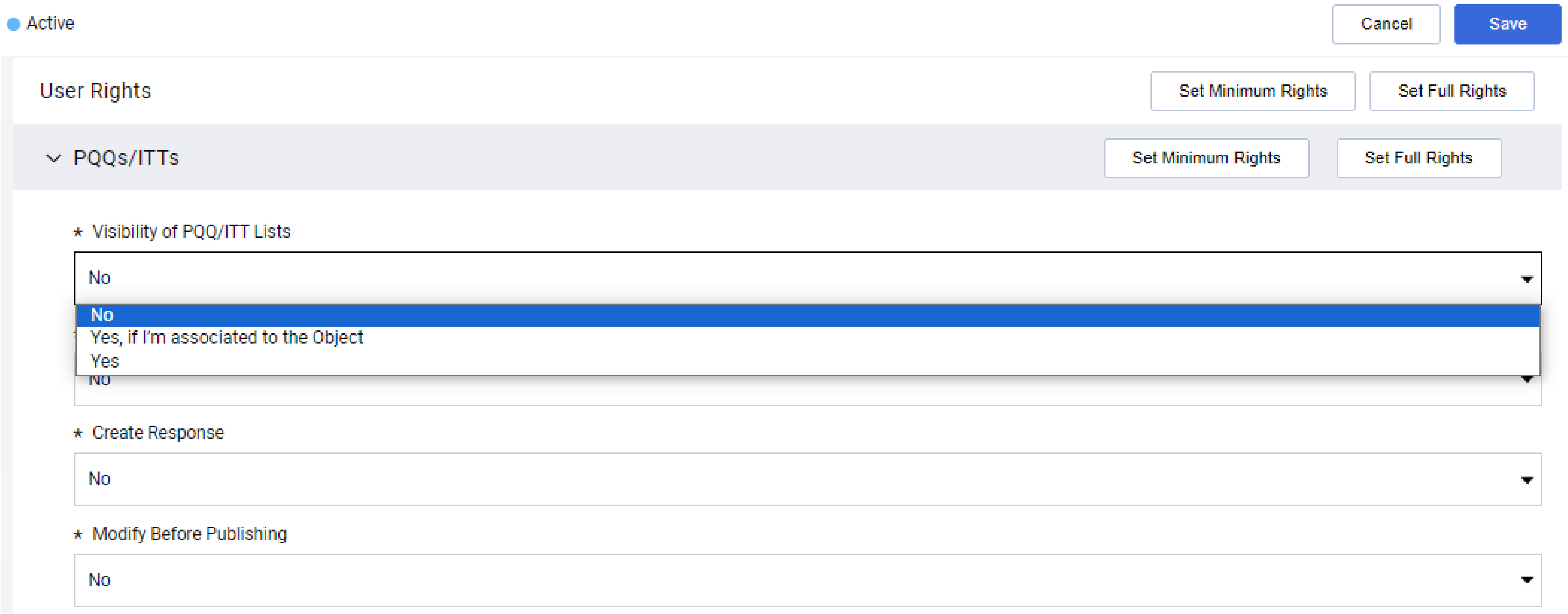


Note: By default, only the Main User can add and manage user, roles & permissions. This role can be provided to others if needed within the “User Management” section of the “User Rights” tab.

Adding Rights

- At the top right of the User Rights page click the very top pencil icon to edit all the user rights sections at once.
- Alternately click the pencil icon beside a single section to edit that one section only.
- You can click the “Set Full Rights” button to grant all permissions or edit each one individually if required.
- In edit mode each permission has a dropdown usually with 2 or 3 choices depending on the options available.
- It’s recommended to set the final “Access to Online Help” option to “Yes” for all users to allow viewing of the help screens.





PQQ/ITT User Rights

User rights for PQQ/ITT permissions should be granted for users that need access to SSE tender events. Different rights are available to view event listings, event details and data, creating bid responses and sending online messages.

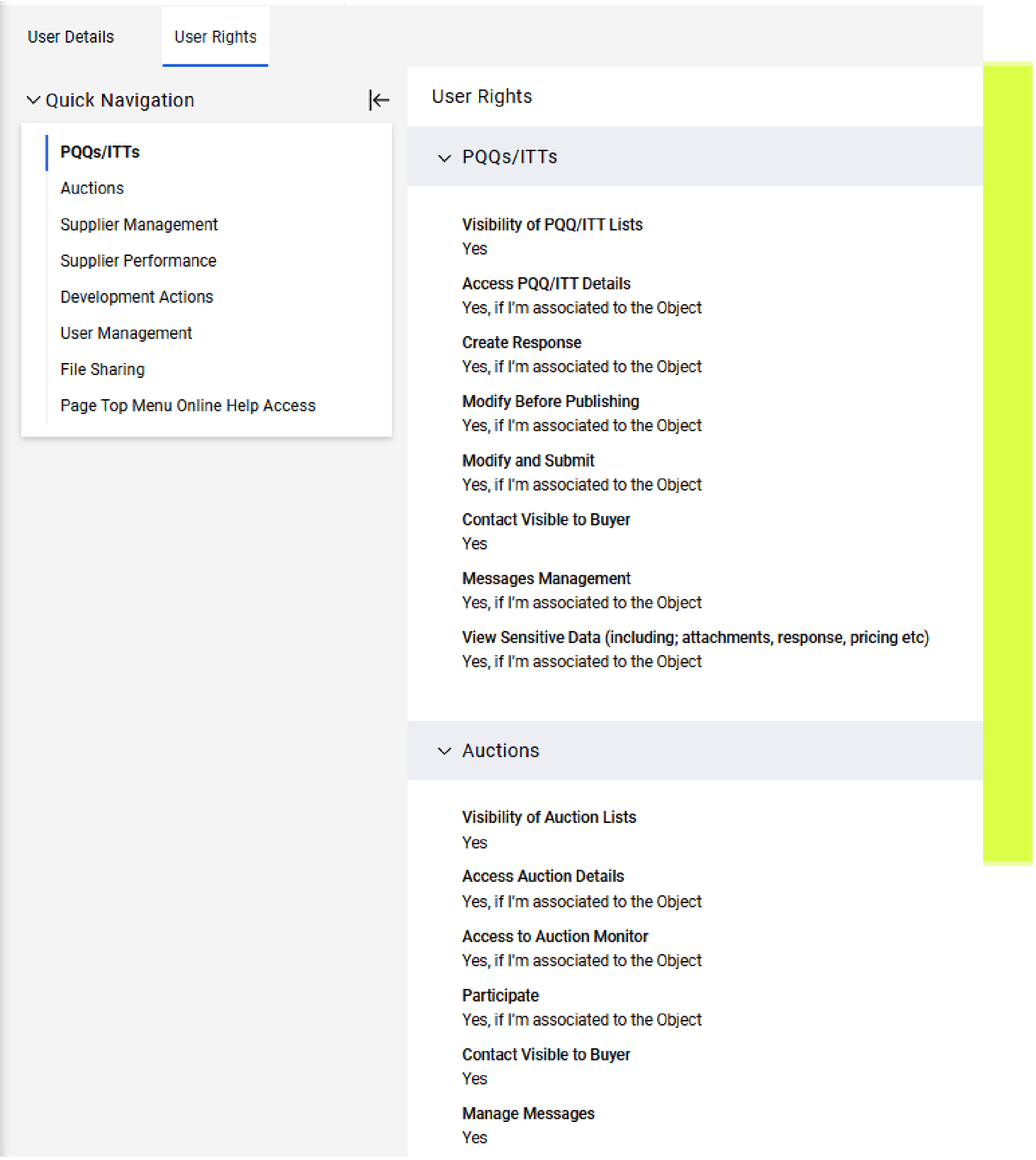
Most PQQ/ITT rights can have one of the following options applied to the user:

- **No** - User never has this permission
- **Yes** - User always has this permission
- **Yes, if I'm associated to the Object** - User has that permission only if they have been added into that specific PQQ/ITT or auction event

Example PQQ/ITT and Auction user rights settings are shown on the right.

Only users with "Contact visible to Buyer" set to "Yes" can be viewed by SSE and added into the tender event. The main user profile will have this set by default. This will also require the user to have the other rights set to "Yes" or "Yes – if I'm associated to the object".

For additional users to receive email notifications of new events they will also need to be added to the "User Management" - "Default Users" page – see later for details.



Scorecards/Plans User Rights

User rights for supplier performance scorecards and development (improvement) plans should be granted for users that need access to view and respond to SSE scores and actions for a project or contract. Different rights are available to view Supplier Management, Supplier Performance scorecards and Development Actions plans.

User rights options for these areas include the following:

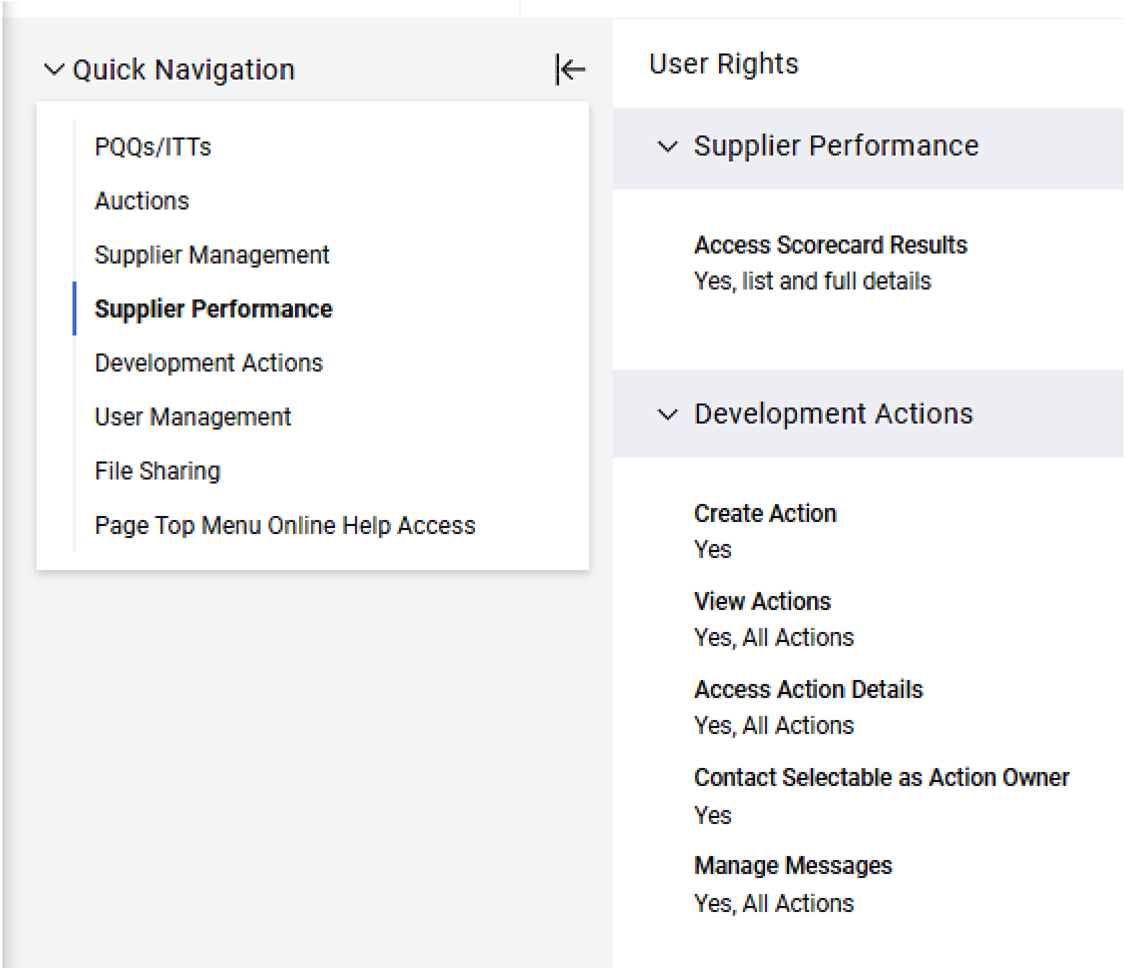
- **No** - User never has this permission
- **Yes** - User always has this permission
- **Yes, Only the list** or **Yes, List and full details**- User can only view a list of scorecards but no details / User can view all scorecards and their details
- **Yes, If I'm the Action Owner** or **Yes, All Actions** – User can access just actions & action details they own / User can access all actions & action details

Example Supplier Performance and Development Actions user rights settings are shown on the right.

Only users with "Contact Selectable as Action Owner" set to "Yes" can be viewed by SSE and assigned improvement actions under a development plan. The main user profile will have this set by default.

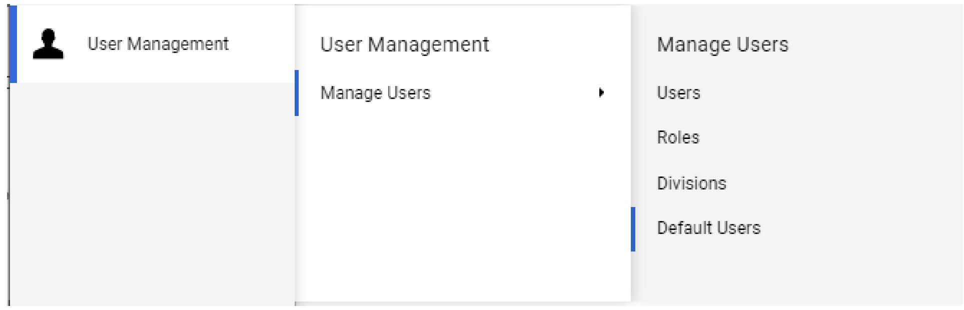
For additional users to receive email notifications of new actions they will also need to be added to the "User Management" - "Default Users" page – see later for details.

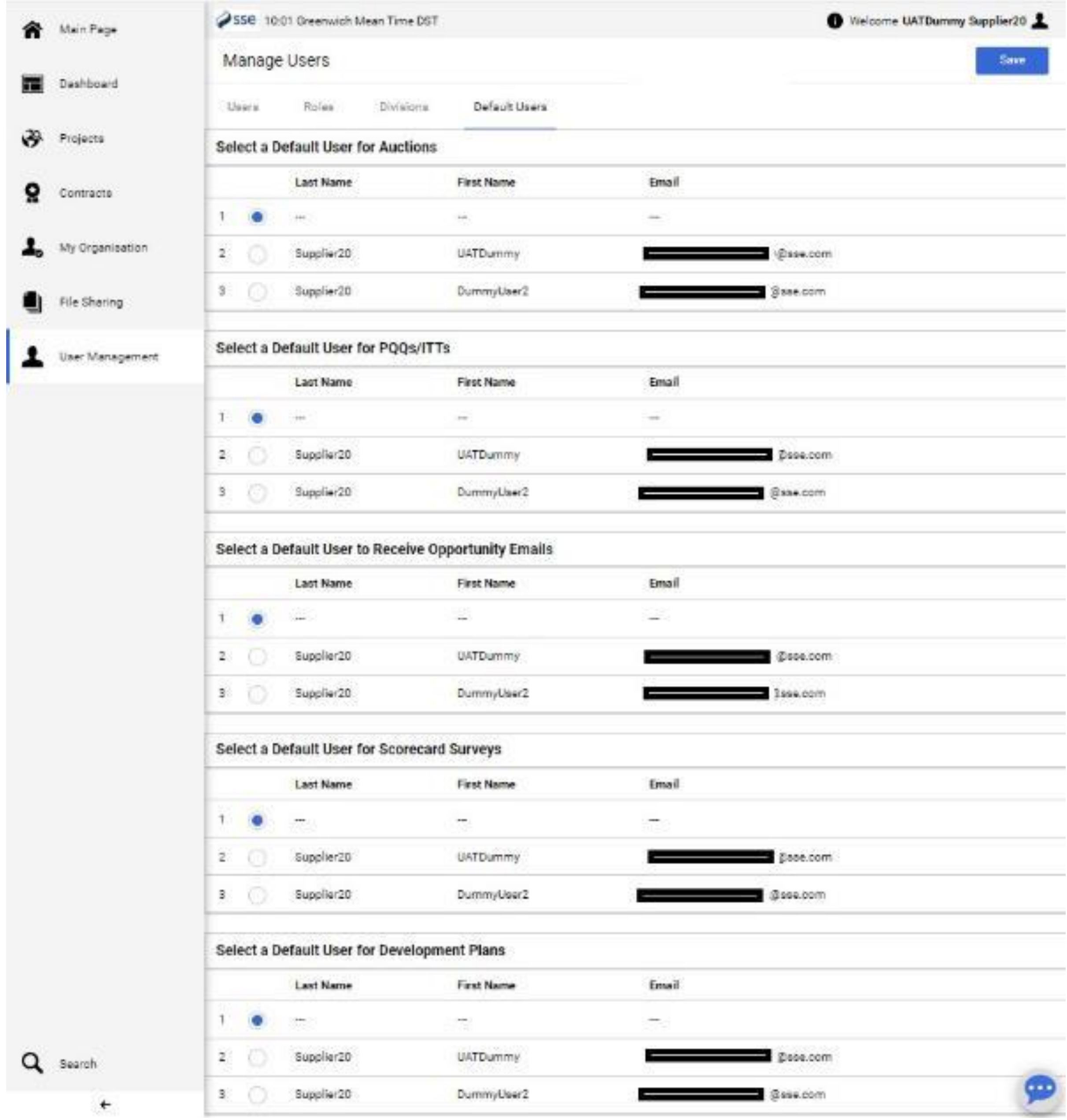
Important Note: Not all suppliers will have scorecards or actions assigned to them. Your SSE business/project customer will contact you to configure any users for this if and when needed.



Default Users

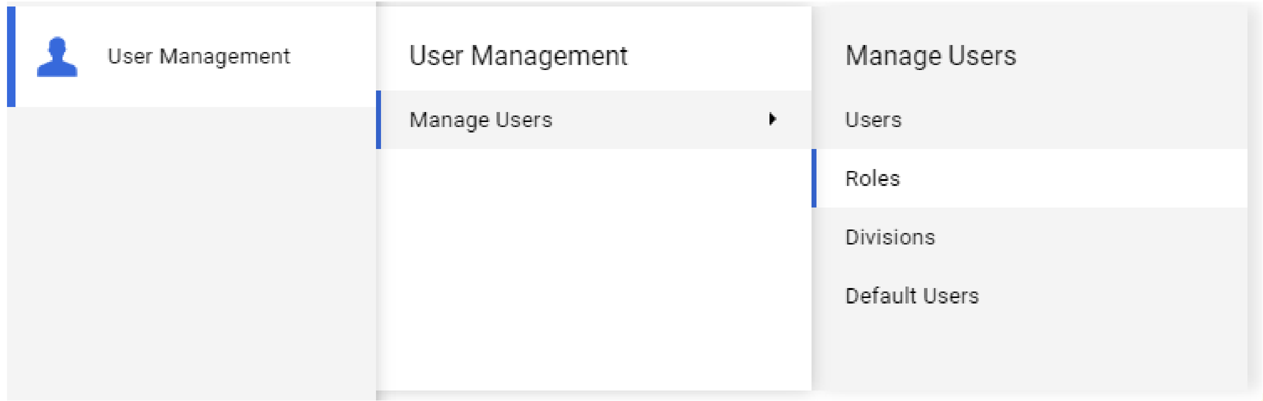
- In the menu click “User Management” -> “Manage Users” -> “Default Users”.
- The initial Main User is set by default to receive all notification emails about different activities.
- When any additional users are added, you can choose which user receives different types of notifications.
    - Auctions – notified of any new auction events
    - PQQs/ITTs – notified of any new PQQ/ITT tender events
    - Opportunity Emails – notified of SSE listed opportunities
    - Scorecard Surveys – notified of any scorecard survey requests
    - Development Plans – notified of improvement actions
- Example settings are shown on the right.
- For each section you can select option 1 (marked “-”) to notify ALL users with rights for that area. This is the default setting.
- Alternately you can select just a single user from those listed. This will prevent other users from receiving those notifications.
- We recommend to select all users for notifications unless your business rules don’t allow. This avoids issues during any staff absence/holidays or when a user leaves your company.

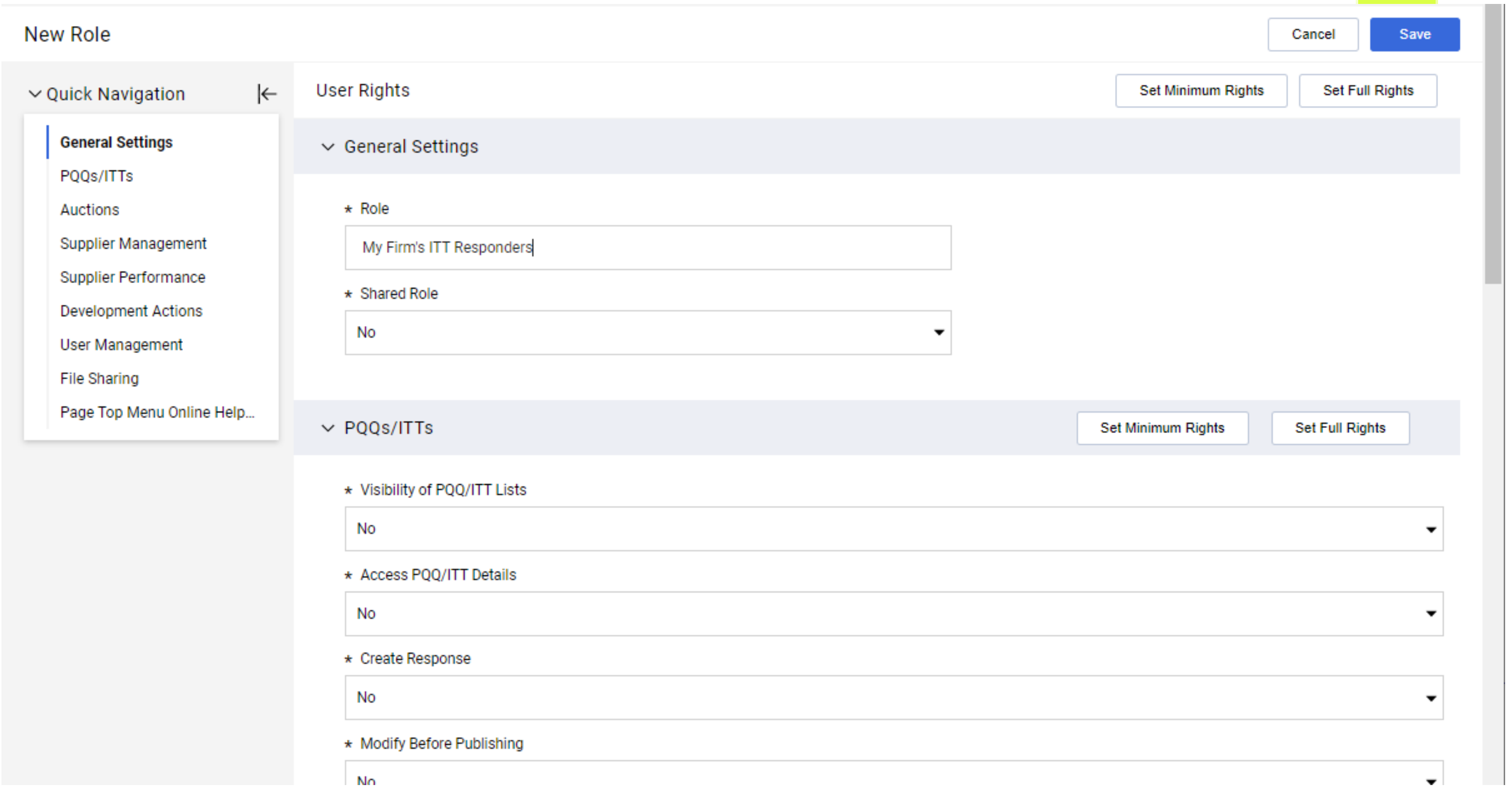




Bespoke User Roles (Optional)

- In the event you need to set up a number of users with varying permissions you can configure your own bespoke supplier user roles.
- This will save time configuring permissions for each individual user when setting up people across different teams within your firm.
- From the menu select “User Management” -> “Manage Users” -> “Roles”.
- Here you can create a new role, provide a title, and set the required permissions for that role in using the dropdown options in each section.
- As before you have the “Set Full Rights” and “Set Minimum Rights” shortcuts if needed.
- Click the “Save” button to complete the role setup.
- Roles can then be assigned to existing users within their profile User Details page or when first creating a new user.





User Divisions (For Information Only)

- Each supplier company is created with a default “Division” which controls user access to that firm’s profile. You can see this listed in the User Management menu options.
- While this default Division is required for system access, there is no need to modify this or create any new Divisions to segregate different teams or companies.
- SSE requires a unique profile be created for each Registered Company Number within the portal to provide clear supplier identification and selection.
- Company group-wide profiles with different divisions should not be created as this may cause issues when events are being assigned to the different registered company profiles.