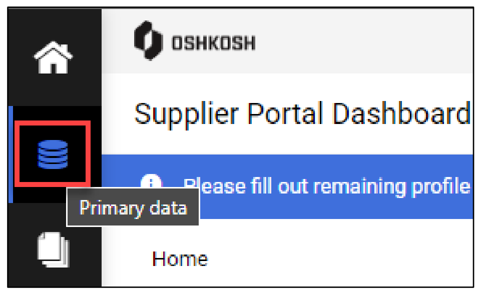
Purpose

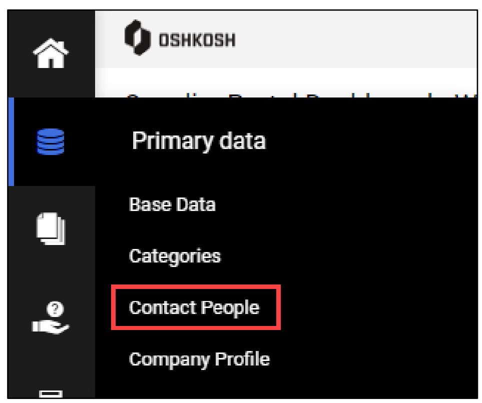
The purpose of this job aid is to walk through the steps of adding additional contacts, removing no-longer valid contacts, as well as a description of the different roles and responsibilities within the Jaggaer portal.

Pages 1-2	Adding, editing, and deleting contacts
Page 3	Assigning/Changing Roles and Responsibilities

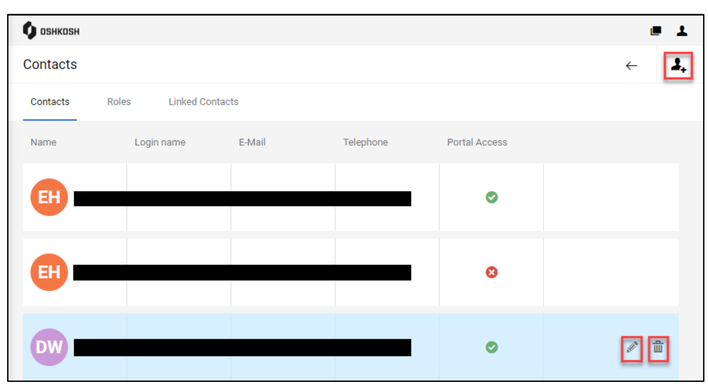
1. Once logged into Jaggaer; select the icon from the left menu to access Primary data

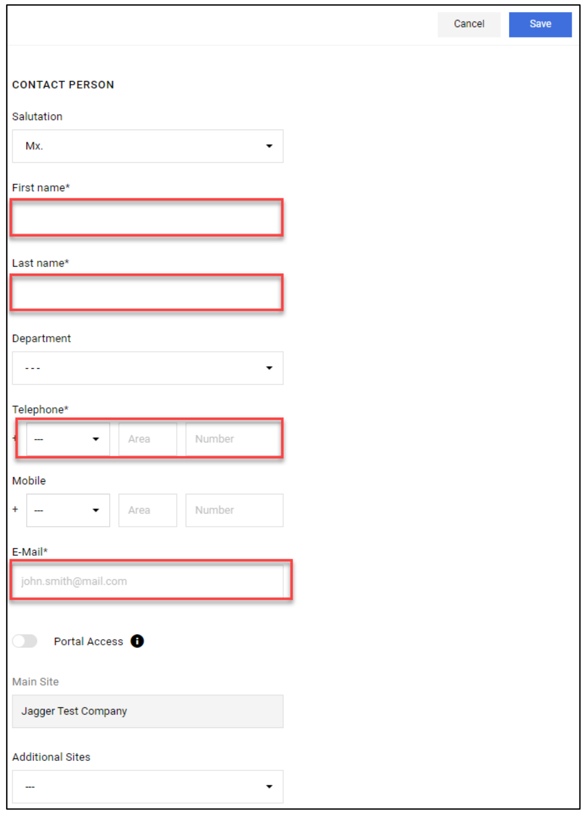
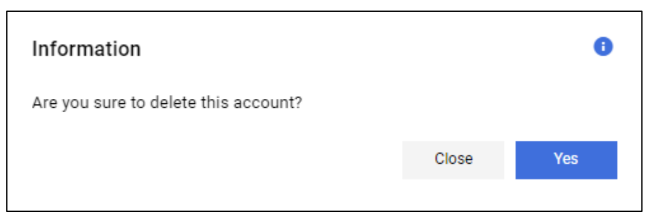


2. When you click on “Primary Data” four options will appear. Select the third option “Contact People”



3. You will be brought to the contacts home where you can view, edit, and delete contacts.
    a. If you want to add a contact, select the icon in the top right
    b. If you want to edit a contact (update name, phone, or email) select the icon on the far right side when hovering over a specific contact
    c. If you would like to delete a contact, select the icon on the far right side when hovering over a specific contact

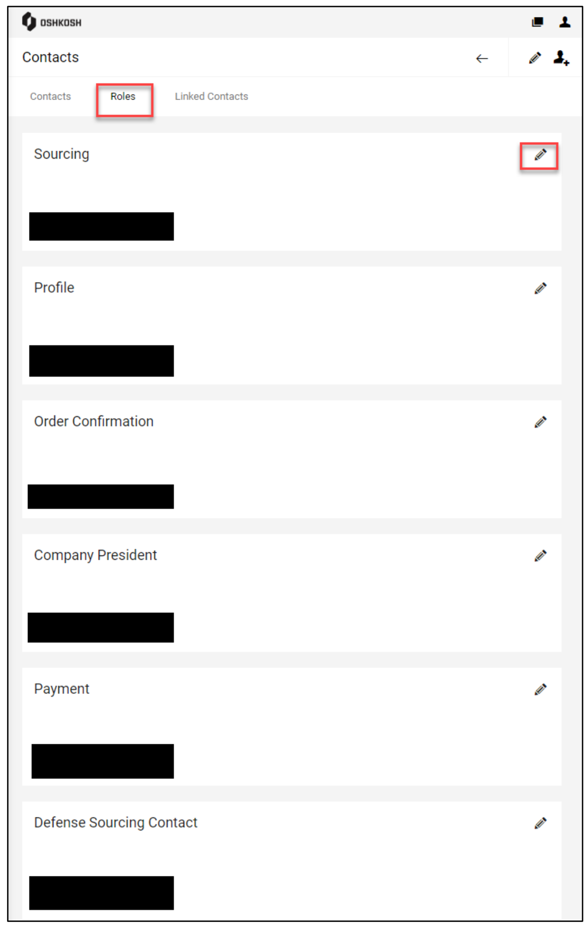


4. If Adding contacts; after selecting "add" with the icon, fill in all of the required fields (marked with *) and click "save" a. If you intend for the contact to be able to access Jaggaer for any reason you must toggel the **Portal Access** button, it will appear blue and below a loginname field will appear i. Usernames are unique and as general rule of thumb we recommend using the first part of your email (joe.smith@example.com = joe.smith)	 
5. If deleting a contact, after selecting "delete" with the icon, you will be prompted with a warning message a.	

***Note:** Editing a contact in this section is limited to name, email, and phone numbers. Roles is covered in next section.*

Roles and Responsibilities

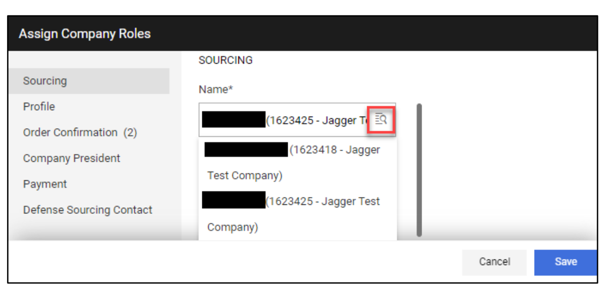
1. After you have all of your contacts added, you can assign roles by selecting the second tab from the top menu, below are description of each option
   - **Sourcing** –Answer and respond to any electronic RFQs regardless of segment *(multiple contacts)*
   - **Profile** – Maintain and adjust supplier profile for your company *(one contact)*
   - **Order Confirmation** – Contact will confirm and change PO's (multiple contacts)
   - **Company President** – Name of company president (one contact)
   - **Payment** – View payments, receipts, & invoices (multiple contacts)
   - **Defense Sourcing Contact** – Answer and respond to any electronic RFQs for Defense only. Can only be one person but if they are not available will move to main sourcing lint of names (one contact)
   - **Cyber Security Contact** (multiple contacts)
   - **Access SIOP** - Attend quarterly Access Segment leadership meetings to review SIOP outlook and participate in discussions that help shape expectations of performance and ongoing initiatives. (two contacts preferred)
   - **Compliance Manager** (one contact)

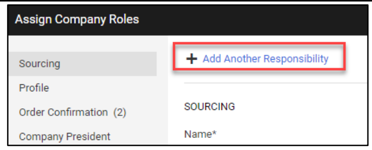


2. To edit the roles, select the edit icon next to anyone of the roles

3. After selecting the icon, an "assign company roles" window will pop up
   - You are able to pick any role and assign from this window
   - Some roles you can assign to multiple while some are restricted to a single user as noted above in blue

4. To assign a person, select the icon



5. If its a role that can be multiple, select add another responsibility to add additional contact	
6. End Job Aid	