The California State University

CSUBUY

A COLLABORATIVE PROCURE TO PAY MARKETPLACE

User Management

Instructions to add users: Start at page 3
Instructions for newly added users: Start at page 9

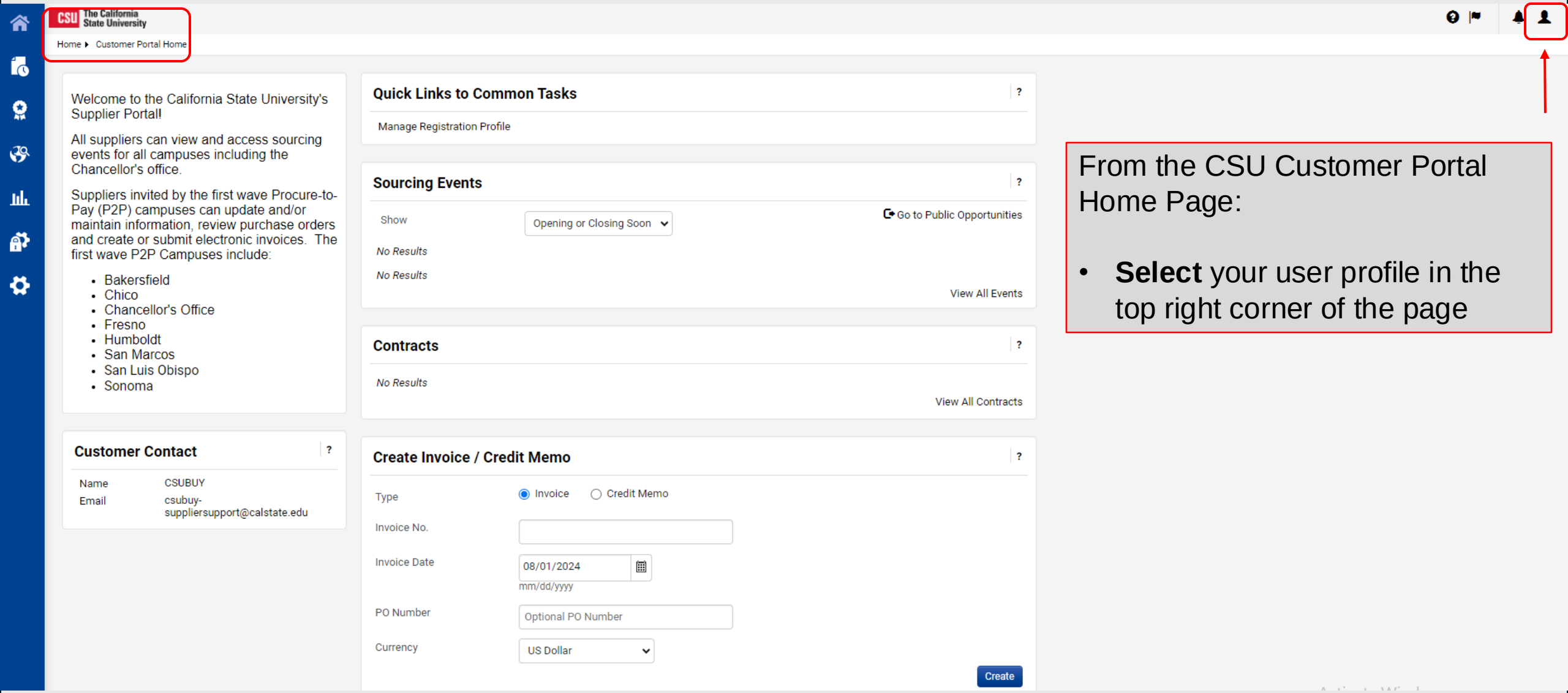
Users can be added to a supplier's profile in the CSUBUY supplier portal

The Supplier Support Contact is the individual who completed the supplier registration process and is the only individual that can add new users to the supplier profile.

Common Reasons that the Supplier Support Contact may want to add new users to the portal include:

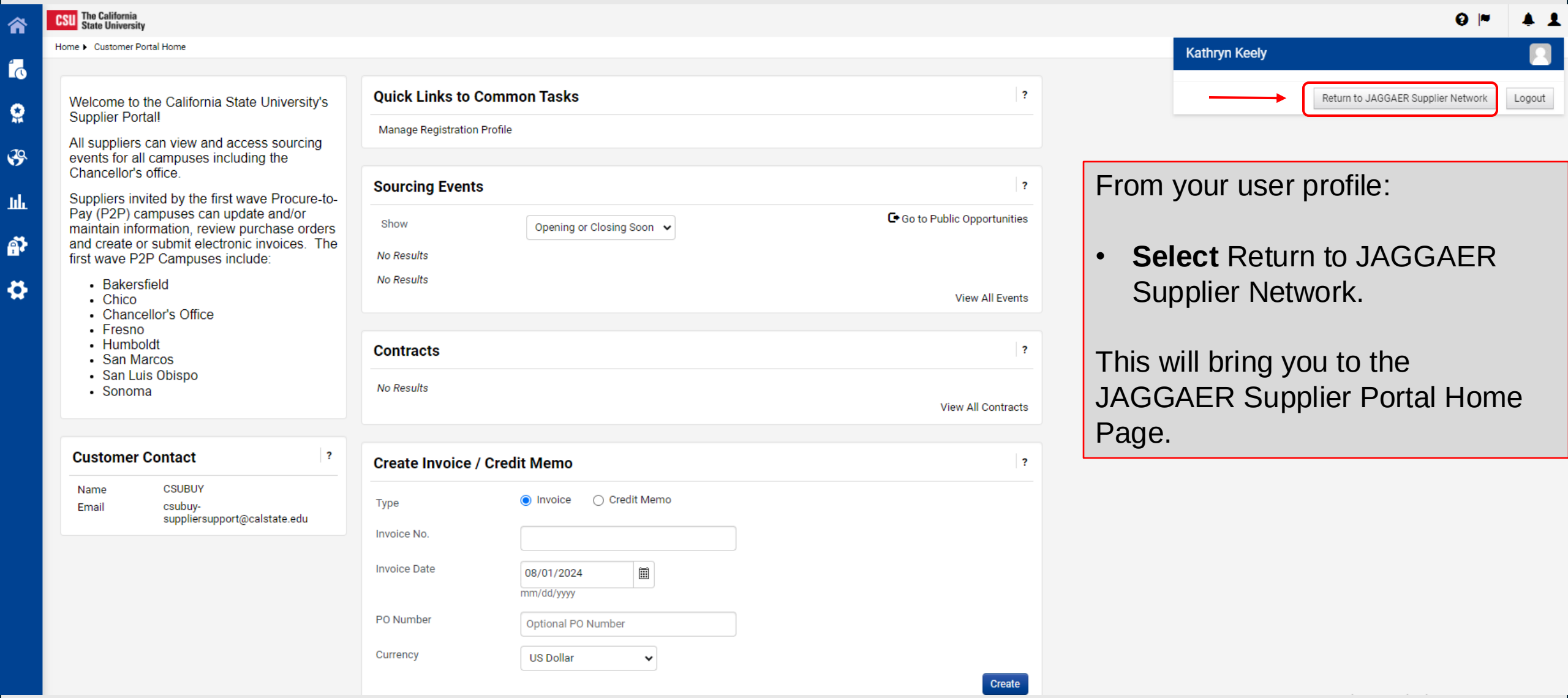
- Additional profile coverage for various tasks
- Role changes/additions within the organization

When adding new users, the Supplier Support Contact should consider whether the new users are equipped to answer questions about the supplier's tax, accounting, and address information.



From the CSU Customer Portal Home Page:

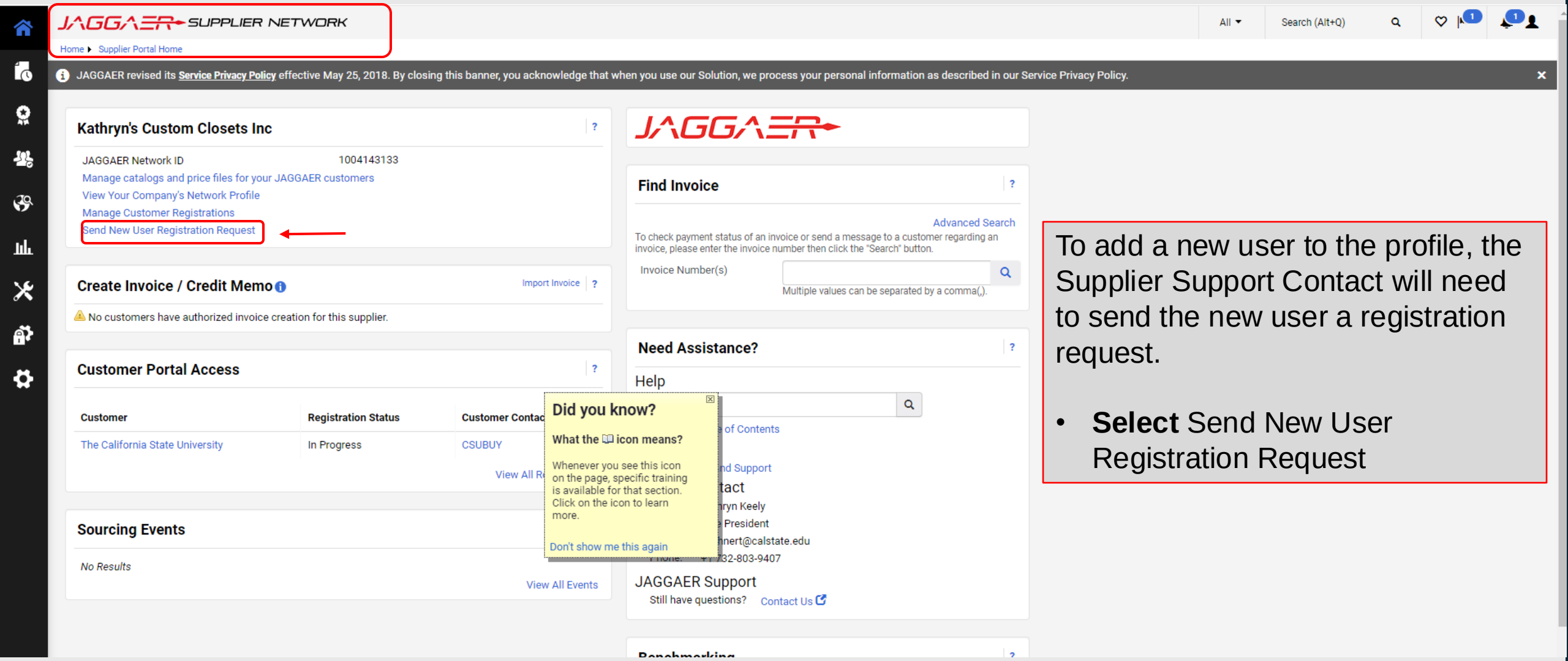
- **Select** your user profile in the top right corner of the page



From your user profile:

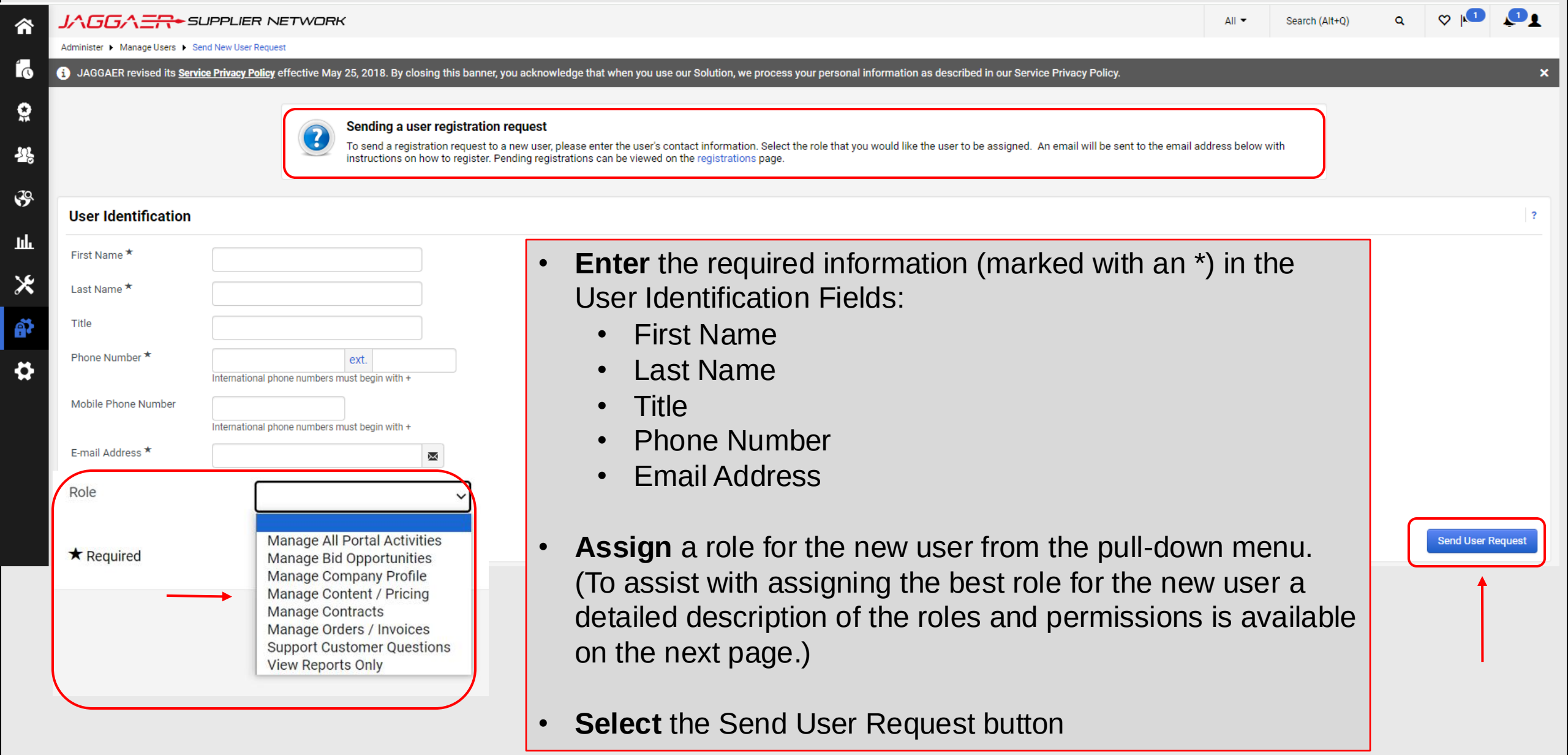
- **Select** Return to JAGGAER Supplier Network.

This will bring you to the JAGGAER Supplier Portal Home Page.



To add a new user to the profile, the Supplier Support Contact will need to send the new user a registration request.

- **Select** Send New User Registration Request

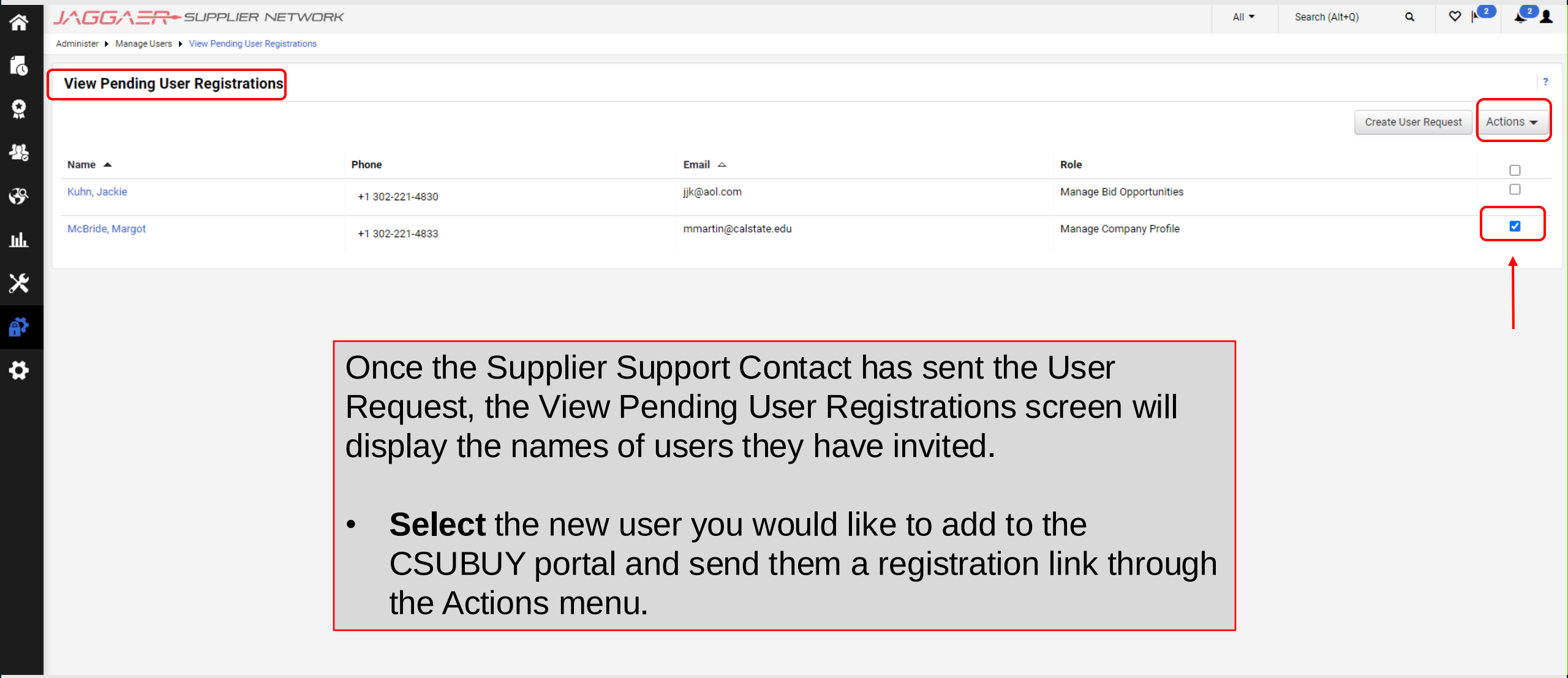


- **Enter** the required information (marked with an *) in the User Identification Fields:
  - First Name
  - Last Name
  - Title
  - Phone Number
  - Email Address
- **Assign** a role for the new user from the pull-down menu. (To assist with assigning the best role for the new user a detailed description of the roles and permissions is available on the next page.)
- **Select** the Send User Request button

Roles and Permissions in the JAGGAER Supplier Network

***Roles highlighted in Red are part of CSUBUY Phase I and are currently the only two available to be selected by the Supplier Support Contact when adding a new user**

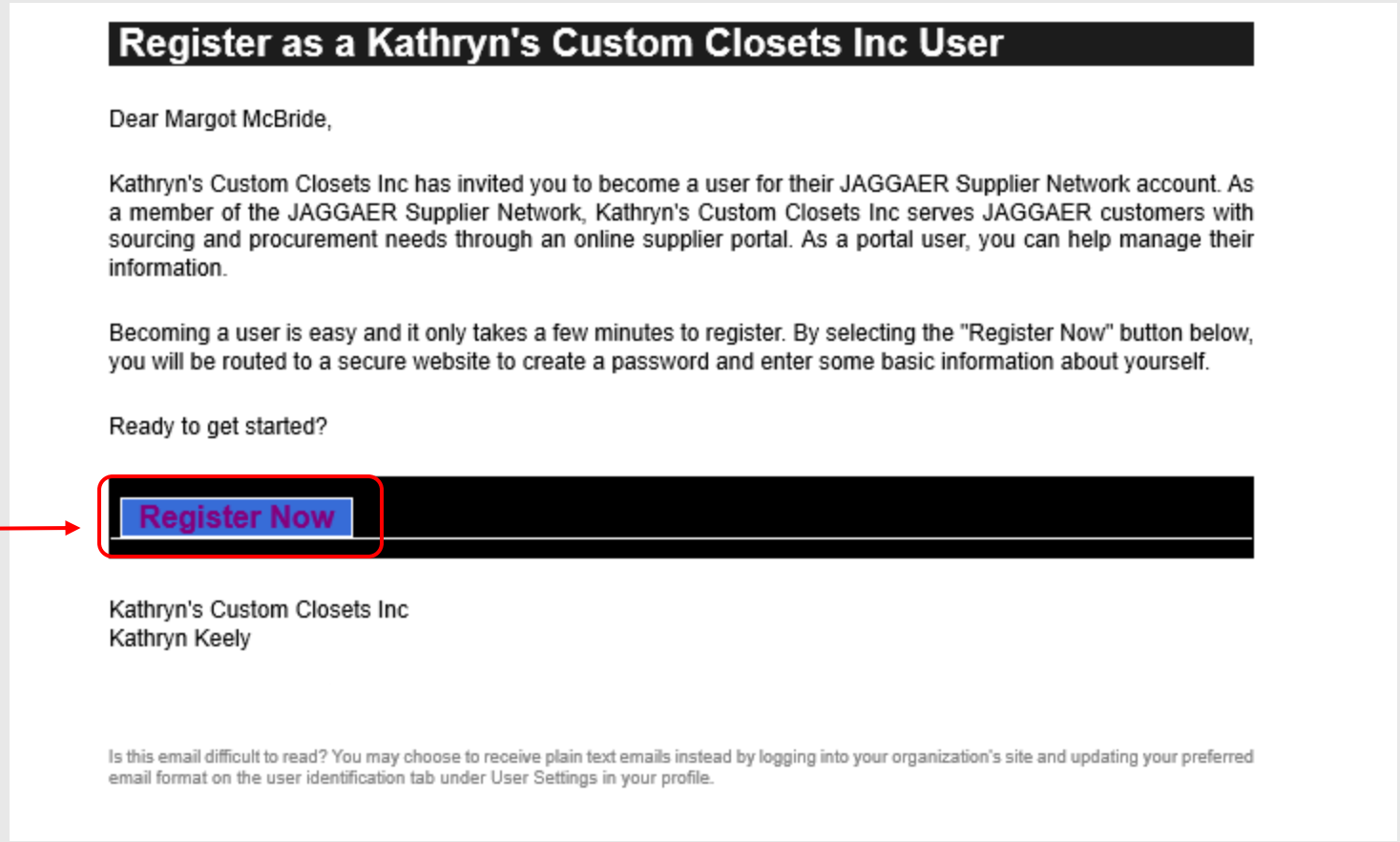
Roles	Permissions
Manage All Portal Activities	Grants user full access to the supplier portal and all editable fields. Individual may create new users, update profile information, manage contracts, etc.
Manage Bid Opportunities	Individual can respond to sourcing events and event-related questions.
Manage Company Profile	Allows the individual to edit supplier profile information, including tax forms and banking information.
Manage Content/Pricing	Used by catalog suppliers. Allows the user to update/add catalog items and pricing.
Manage Contracts	Allows users to view and manage contracts customers have shared in the portal.
Manage Orders/Invoices	Individual can view and create Sales Invoices/Credit Memos and review and close Sales Orders.
Support Customer Questions	Able to view and edit their own profile and respond to customer questions
View Reports Only	User can view and edit their own profile and access supplier portal reports but has no edit or creation permissions.



Once the Supplier Support Contact has sent the User Request, the View Pending User Registrations screen will display the names of users they have invited.

- **Select** the new user you would like to add to the CSUBUY portal and send them a registration link through the Actions menu.

The new user will receive an email from the JAGGAER Supplier Network prompting them to **Register Now.**



Register as a Kathryn's Custom Closets Inc User

Dear Margot McBride,

Kathryn's Custom Closets Inc has invited you to become a user for their JAGGAER Supplier Network account. As a member of the JAGGAER Supplier Network, Kathryn's Custom Closets Inc serves JAGGAER customers with sourcing and procurement needs through an online supplier portal. As a portal user, you can help manage their information.

Becoming a user is easy and it only takes a few minutes to register. By selecting the "Register Now" button below, you will be routed to a secure website to create a password and enter some basic information about yourself.

Ready to get started?

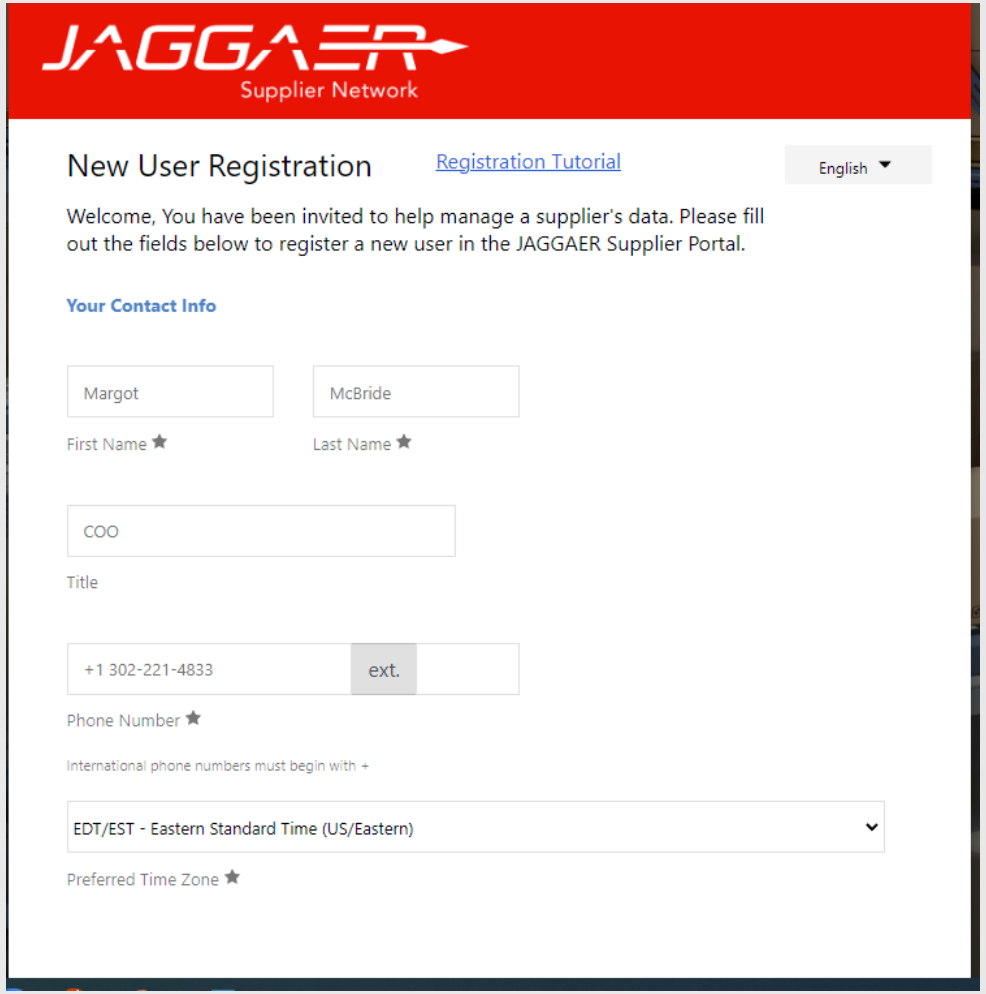
Register Now

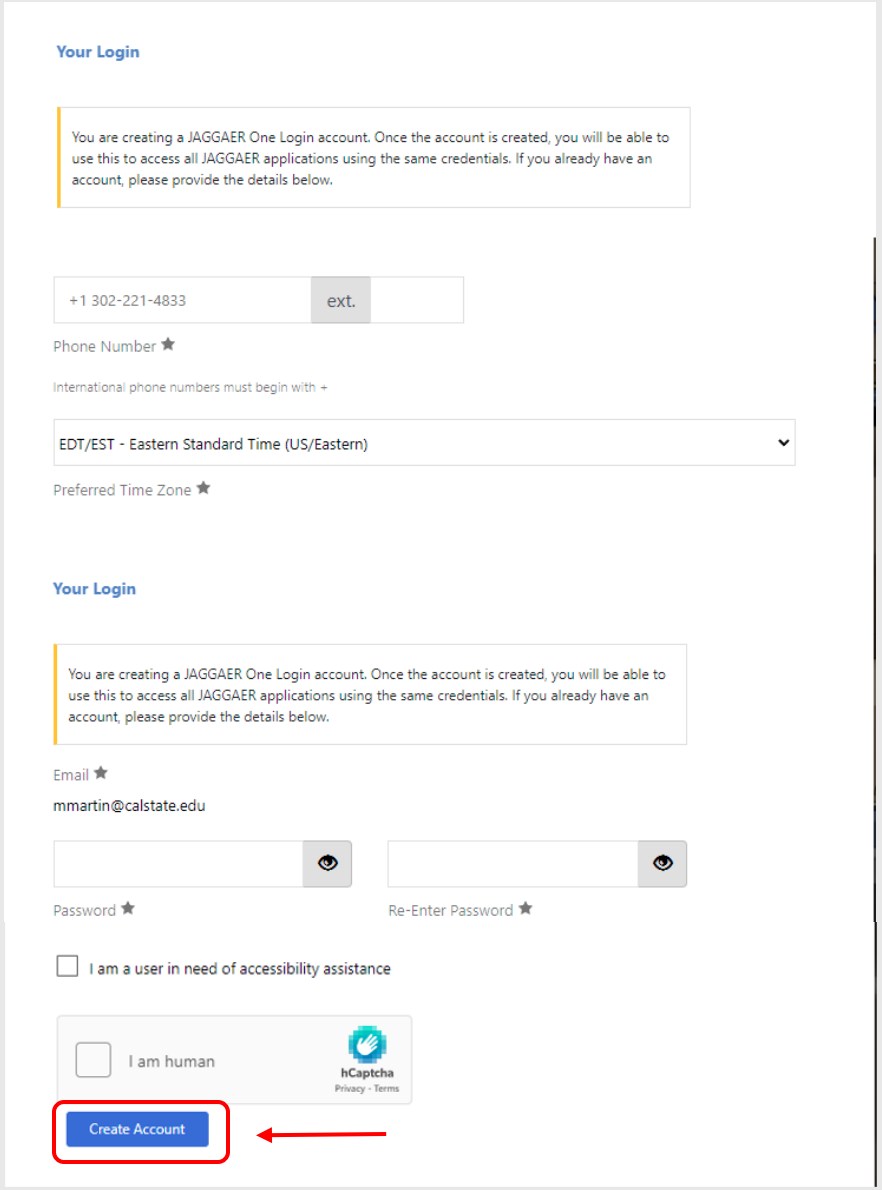
Kathryn's Custom Closets Inc
Kathryn Keely

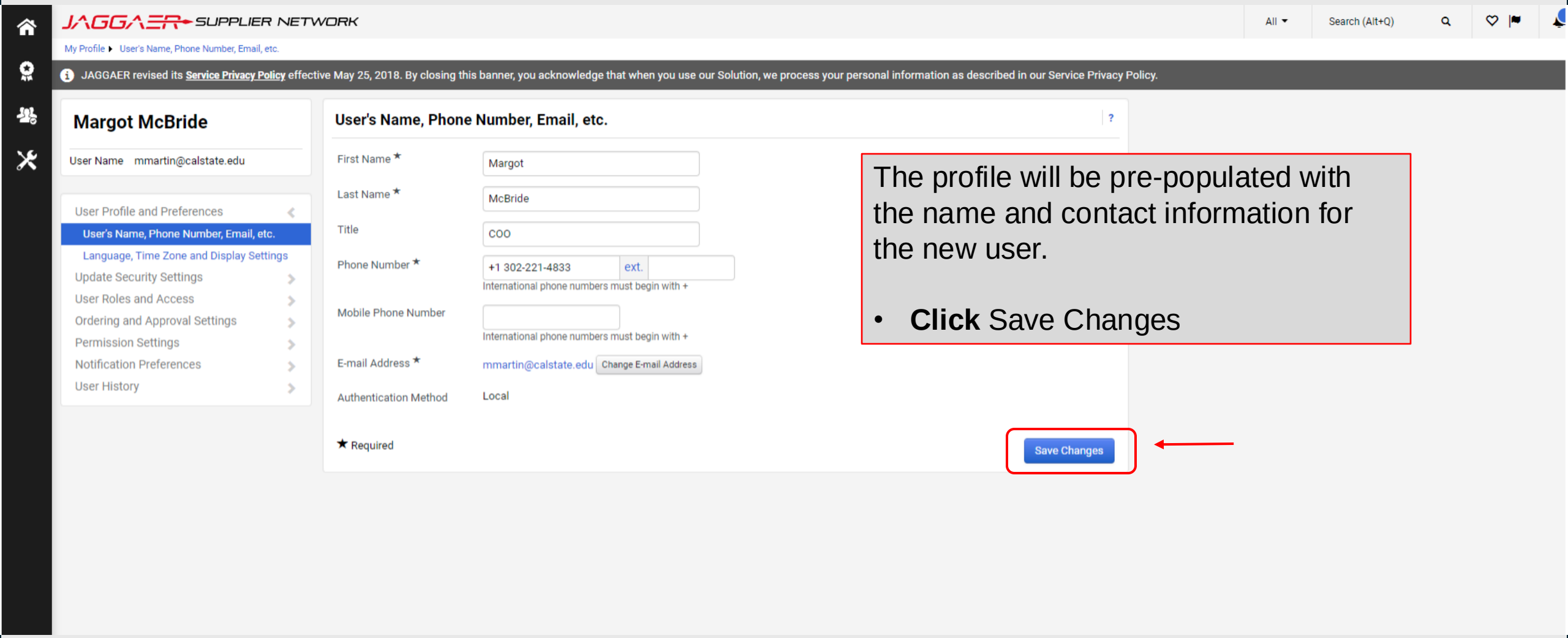
Is this email difficult to read? You may choose to receive plain text emails instead by logging into your organization's site and updating your preferred email format on the user identification tab under User Settings in your profile.

The new user must complete the required fields (marked with an *) in the New User Registration.

- **Click** Create Account.

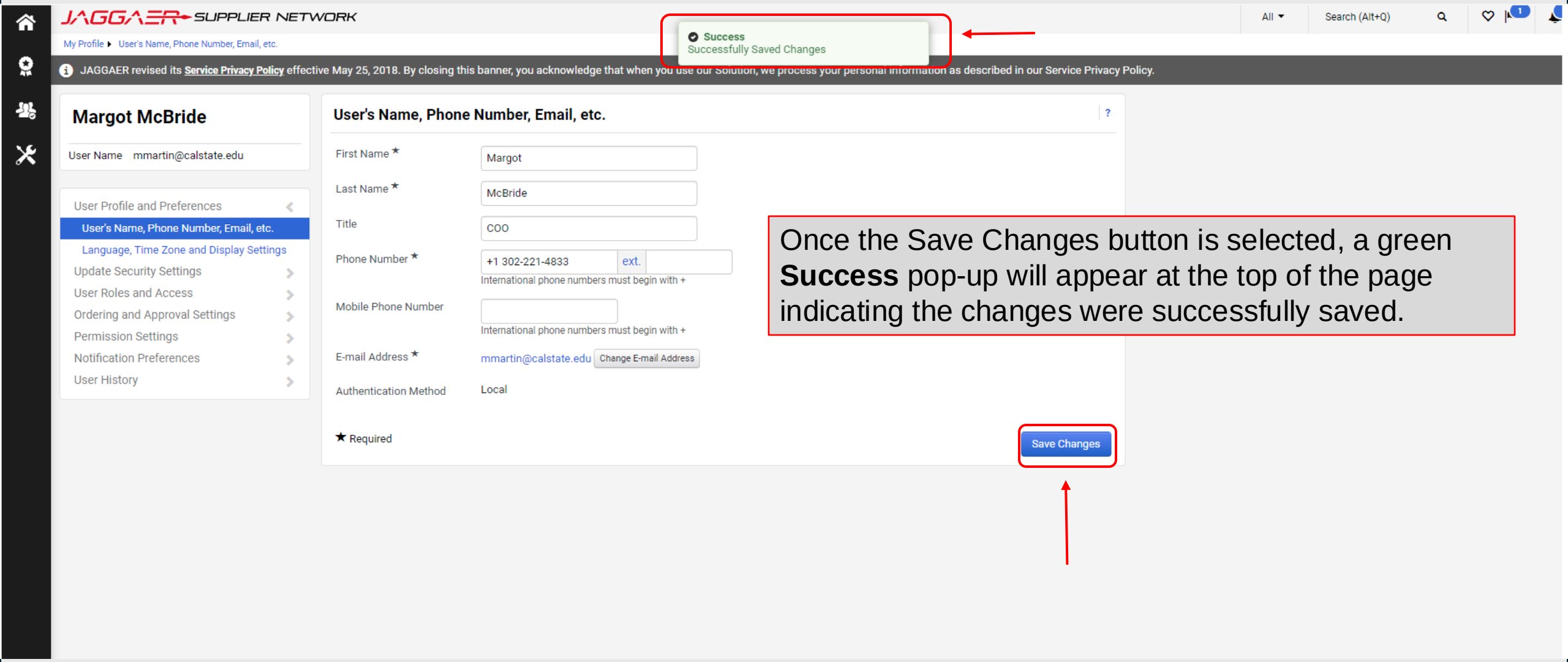






The profile will be pre-populated with the name and contact information for the new user.

- **Click** Save Changes



Once the Save Changes button is selected, a green **Success** pop-up will appear at the top of the page indicating the changes were successfully saved.

CSU The California State University

CSUBUY
A COLLABORATIVE PROCURE TO PAY MARKETPLACE

RESOURCES
Login issues, technical problems, identifying your organization's portal administrator: JAGGAER support
Assistance with registration related issues: csubuy-suppliersupport@calstate.edu
Reset your password
Portal Login