First, some housekeeping

• The Master Data Management (MDM) team was renamed in May.
• New name: Supplier Data Management (SDM).
• Same responsibilities, just a more descriptive name.
Agenda

• Supplier Edit Request forms
• New supplier request forms
• Tracking and notifications
• Recap and resources
First, a little warm up
Scenario:

Tracy Jordan is scheduled to perform at the IU Auditorium this fall. You’re responsible for ensuring he will be paid for his appearance. What’s your first step? Search!

A. Submit a supplier edit request form and request the record be activated for use.
B. Use a Non-Catalog Order (Purchase Order) request form to invite Mr. Jordan to complete the registration process.
C. Submit a supplier edit request form and request Mr. Jordan be invited to complete the registration process.
D. Submit a support form to notify the SDM team that the record needs to be activated.
Answer:

C. Submit a supplier edit request form and request Mr. Jordan be invited to complete the registration process.

- The inactive status (red “x”) means that the record is not ready to use.
- The “None” registration status means that the supplier has never been invited to register.
Where are supplier forms located in BUY.IU?

Supplier module
Requests
Request New Supplier
Supplier Edit Request forms
When is a Supplier Edit Request form used?

When you searched for the supplier in BUY.IU and find the supplier you need to use either in or out of network.

• Out of network suppliers must register in IU’s instance of Jaggaer.

• Inactive suppliers may have been converted from KFS or deactivated by SDM.
  • Check the Internal Notes and History for more information.

Review the March CATS presentation for supplier search tips!
Link in Resources
Possible supplier edits and other uses

- Request a supplier invitation be resent.
  - Do not email these requests to supplier@iu.edu or use the Support Form. Instead, submit a Supplier Edit Request form.
- Add a new fulfillment center.
  - Fulfillment centers drive where orders and payments are sent.
- Request an “Approved” supplier be activated for use.
  - SDM reviewed and approved the record but forgot to activate the supplier for use.
- Change a supplier’s registration type.
  - A Chrome River traveler is receiving a taxable payment (such as honoraria).
Supplier Edit Request form tips

- Enter the Jaggaer ID number for out of network suppliers. Jaggaer IDs start with a “1.”

Review the How to Read a Supplier Record guide for help locating these details on the supplier record. Link in Resources.
Supplier Edit Request form tips cont’d

• Details help!
• Use the text fields at the bottom of the form to clearly state what action is needed and provide additional context.

Review the How to Submit a Supplier Edit Request form video for a full walk through. Link in Resources.

Please provide the reason for the edit and upload any supporting documentation*

Update remit address to
1234 N Main St
Riverside, IA 52327

1939 characters remaining

Supporting Documentation for requested Supplier edits: Include copy of an invoice or email. Do not load any critical data such as Tax documents, Social Security Numbers, Drivers License, etc. Please click the Help Text icon for a link to the Critical Data documentation.

Kirk email request  Upload

Comments To Share With SDM

Mr. Kirk contacted our office and let us know he tried contacting Jagger support to reset his password but wasn’t able to.

1784 characters remaining

Describe action needed from SDM.

Additional context to help SDM complete request.
New supplier request forms
When is a new supplier request form used?

When you searched for the supplier in BUY.IU and do not find the supplier you need either in or out of network.

• The supplier is brand new to the Jaggaer network and IU.

• There is no existing record to reference. They are registering in the Jaggaer network for the first time.
Supplier registration

Suppliers are responsible for entering and maintaining their own information in the Jaggaer supplier portal. However, registration is not always required.

<table>
<thead>
<tr>
<th>Form name</th>
<th>Registration required when:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Request (Tax ID Required)</td>
<td>• Always.</td>
</tr>
<tr>
<td>Chrome River Non-Employee Traveler</td>
<td>• Payment requested via ACH.</td>
</tr>
<tr>
<td></td>
<td>• Note: Wire and Foreign Draft information must be manually entered on Chrome River document.</td>
</tr>
<tr>
<td>Non-Catalog (Purchase Order)</td>
<td>• Always.</td>
</tr>
<tr>
<td>One-Time Refund and Reimbursement Supplier</td>
<td>• Payment requested via ACH, Wire, or Foreign Draft.</td>
</tr>
<tr>
<td>Research Participant</td>
<td>• Participant will receive more than $400 over course of calendar year.</td>
</tr>
<tr>
<td></td>
<td>• Payment requested via ACH, Wire, or Foreign Draft.</td>
</tr>
</tbody>
</table>
Supplier registration invitation

• SDM copies requester on initial supplier invitation email.

• Requester copied on additional supplier emails if information is missing from profile or other edits are needed.

• Invitation includes link to the For Suppliers page which contains registration walkthrough guides.
Tracking and Notifications
My Supplier Requests provides a running list of all your submitted supplier request forms.
**My Supplier Requests**

**Filter Supplier Requests**

- Requested Supplier, Template Name
- Request Status: 
  - Approved
  - Rejected
  - Under Review
  - Incomplete
  - Returned
  - Completed

**Request Status**

- Request Status column refers to the supplier request form, NOT the supplier.

- Search for a supplier or filter requests by status.

- Review Registration Status column to track supplier progress.
Supplier registration statuses

Use the registration status in conjunction with the History and Internal Notes on the supplier record to track the supplier’s progress.

<table>
<thead>
<tr>
<th>Registration status</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>The supplier has not been invited to register with IU.</td>
</tr>
<tr>
<td>Invited</td>
<td>The supplier has been invited to register but has not created a login or started the registration process.</td>
</tr>
<tr>
<td>In Progress</td>
<td>The supplier has created a login and started the registration process. Alternatively, the supplier submitted information and SDM flagged items for review that require updates in the supplier portal.</td>
</tr>
<tr>
<td>Profile Complete</td>
<td>The supplier has completed registration and submitted their profile for review.</td>
</tr>
<tr>
<td>Approved</td>
<td>SDM has reviewed the record and approved the supplier for use.</td>
</tr>
</tbody>
</table>
New supplier request notifications

Form submitter receives email notifications when the following actions are complete:

- **Request form approved**
  - Request form has completed routing through Purchasing (for Non-Catalog requests) and SDM.

- **Registration submitted**
  - Supplier has submitted information via portal and it is awaiting review by SDM.

- **Supplier approved and ready to use**
  - Supplier profile is approved and ready to use. Requisition can be initiated.
Supplier Edit Request notifications

Form submitter receives email notifications when the following actions are complete:

- **Request form returned**
  - SDM requires more information before they can act.

- **Request form rejected**
  - Action requested has been completed by SDM.
Form return

• If SDM is not sure what action is being requested on the Supplier Edit Request form they will return it to the submitter.

• Use My Supplier Requests or the link in the email notification to access the form.

• Review the form History and review questions left by SDM. Use the Comments field on the Supplier Edit Request form to answer their questions and resubmit the form.
Form rejection

- Ultimately, all Supplier Edit Request forms are rejected by SDM.
  - Approving the form would result in a duplicate supplier record.
- SDM staff leave comments in the form History describing what action was taken on the supplier record.
  - Confirm action was taken by reviewing Internal Notes and History in supplier record.
- Use My Supplier Requests or the link in the email notification to access the form.
Instructions

Prior to completing this form, search for the supplier name to obtain the Buy.IU Supplier Number found in the About section on the Supplier 360 tab.

This document describes how to search for a supplier.
If steps were missed, submit another supplier edit request form.
Scenario:

It’s three years later. Tracy Jordan is invited back to IU, this time as a keynote speaker. His payment needs to be sent to a new address. He’s tried accessing his portal but hasn’t been able to recover his password.

You submit a Supplier Edit Request form, using your email conversation with Tracy as substantiation documentation, and request his address be changed. Your form is rejected. How do you confirm the necessary changes were made?

A. Submit a request via the Purchasing/SDM/AP support form and request an update.

B. Visit Mr. Jordan’s supplier record and confirm the changes were made.

C. Review notes left by SDM in the History of the Supplier Edit Request form.

D. Because the form was rejected you can assume the necessary action was not taken.
Answer:

B. Visit Mr. Jordan’s supplier record and confirm the changes were made.
and/or

C. Review notes left by SDM in the History of the Supplier Edit Request form.

- Form rejection does not mean no action was taken!
- Always review the History of the form to see Comments left by SDM.
Recap and Resources
Recap

1. If the supplier exists in BUY.IU in and needs edits or to register, use a Supplier Edit Request form.
   a. This applies to in and out of network suppliers.

2. If the supplier does **not** exist in BUY.IU and needs to register or be added, use a new supplier request form.

3. Use the new supplier request form that fits your payment or purchase situation.

4. All Supplier Edit Request forms are rejected by design.
   a. Check the form History to confirm needed edits were made.
Resources

- **BUY.IU Supplier Resource Center**: Guides for department users demonstrating when and how to submit supplier request forms.

- **Supplier Edit Request form video tutorial**: 6-minute video that demonstrates how to successfully complete and track a supplier edit request form.

- **SDM and Supplier Search presentation recording**: Learn more about SDM and how to search for suppliers in BUY.IU.

- **New Supplier Flyer**: One-page document outlining onboarding process and help resources.

- **For Suppliers page**: Resources to share with suppliers about using their Jaggaer portal and completing the registration process.
Thank you!
What other questions do you have?