

Handbook for Suppliers

v04

Release v00
November 2022

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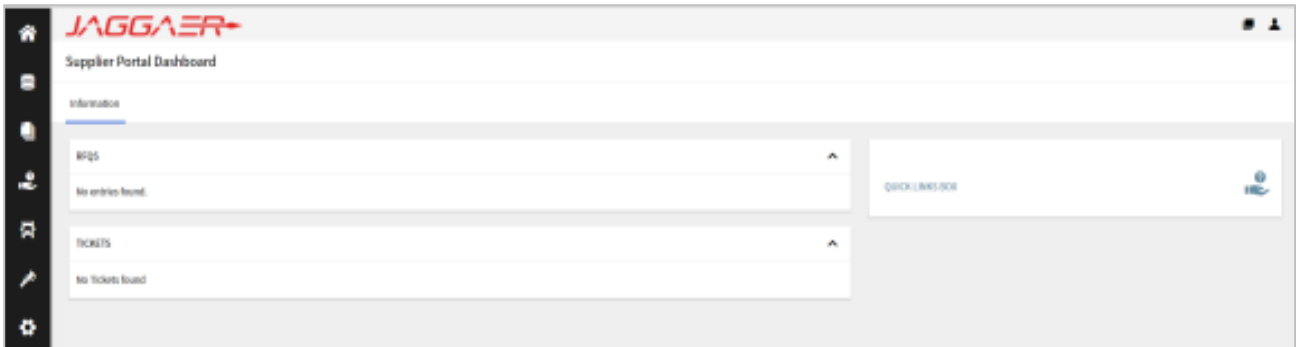
1 WELCOME

The purpose of this handbook is to familiarize users with tasks performed in the JAGGAER Direct solution.

We hope it helps you to:

- Understand solution functionality.
- Perform common tasks.
- Incorporate product functionality to use it most effectively with your business practices.

2 SUPPLIER PORTAL OVERVIEW








JAGGAER Direct supplier registration enables the structured and specific acquisition relevant information of a supplier. Data like certificates, technologies, products, supported standards, etc. are at your disposal in the supplier profile in SRM (Supplier Relationship Management).




After a supplier is accepted by the purchaser/user, they can log in to the portal by clicking on the link in the registration approval email. Their login name and password are the ones entered during the registration process.

2.1 Navigation Tree

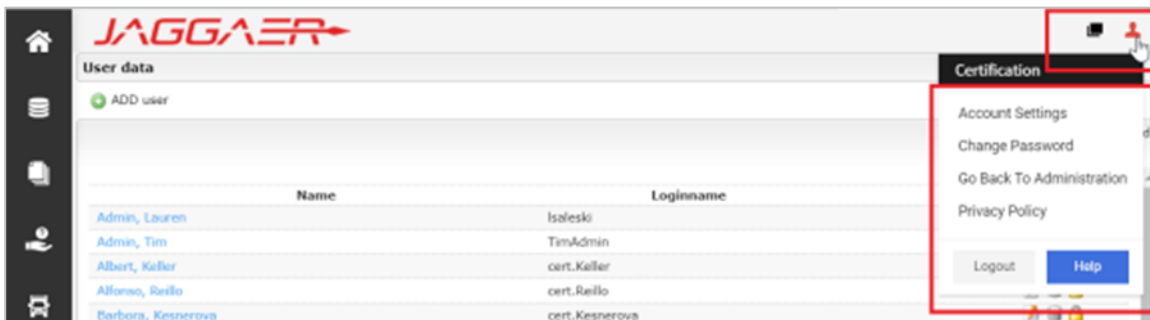
On the left-hand side of the portal is the navigation tree, and the main part of the page is the Supplier Portal Dashboard.

The navigation tree offers access to the following areas / modules:

Icon	Name	Explanation
	Home	Return to the Dashboard.
	Primary Data	Base data, categories, contact people, and company profile.
	Documents	Documents and contracts.
	Requests	Requests and RFQs.
	SCM	Purchase orders (order lists and disposition lists), ASN (open ASNs and advised delivery notes), and invoices.

Icon	Name	Explanation
	Quality	Review ratings.
	Administration	Access user data.
	Open	Expand view of navigation tree.

3 TOOLBAR



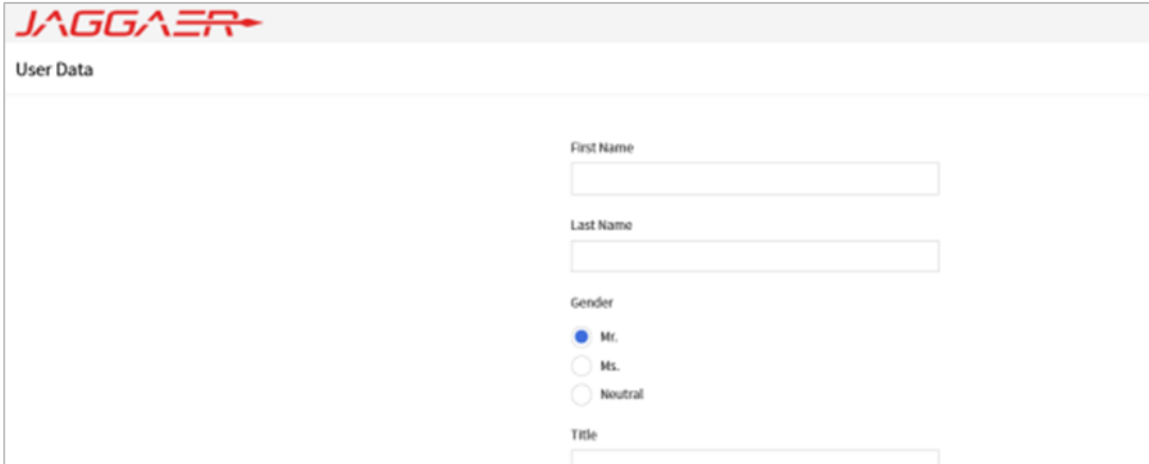
The toolbar is located above the dashboard and offers an easy way to open a new window, edit your password, edit account settings, and view the privacy policy agreement in different languages.

Click the **new window** icon to open a new application window.

Click the **user icon** to access the following options:

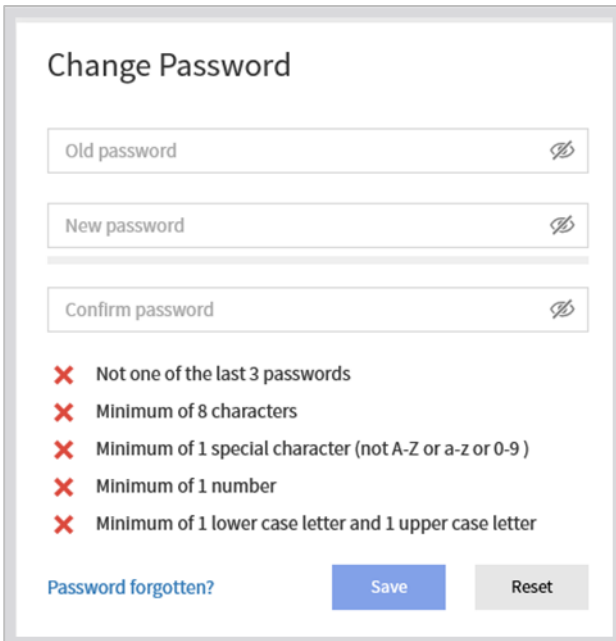
- **Account settings** - Edit your user data.
- **Change Password** - Change your account password.
- **Go Back to Administration** - Enter the Administration area. Only available to admins.
- **Privacy Policy** - View the JAGGAER Direct Privacy Policy in any of the following languages: Arabic, Chinese, German, Spanish, French, Italian, Japanese, Dutch, Polish, Portuguese, and Brazilian Portuguese.
- **Logout** - Log out of the application.
- **Help** - Open the JAGGAER Direct online help to get more information on each module.

3.1 Account Setting



Account settings open the User Data page, and let you edit your personal information. Save changes with the Save button in the toolbar.

3.2 Change Password



You can change your password here. It must be different from the last three ones you used, contain at least one upper and one lower case letter, one number, and one special character.

3.3 Online Help

JAGGAER Direct offers multilingual online help for understand modules and instructional steps.

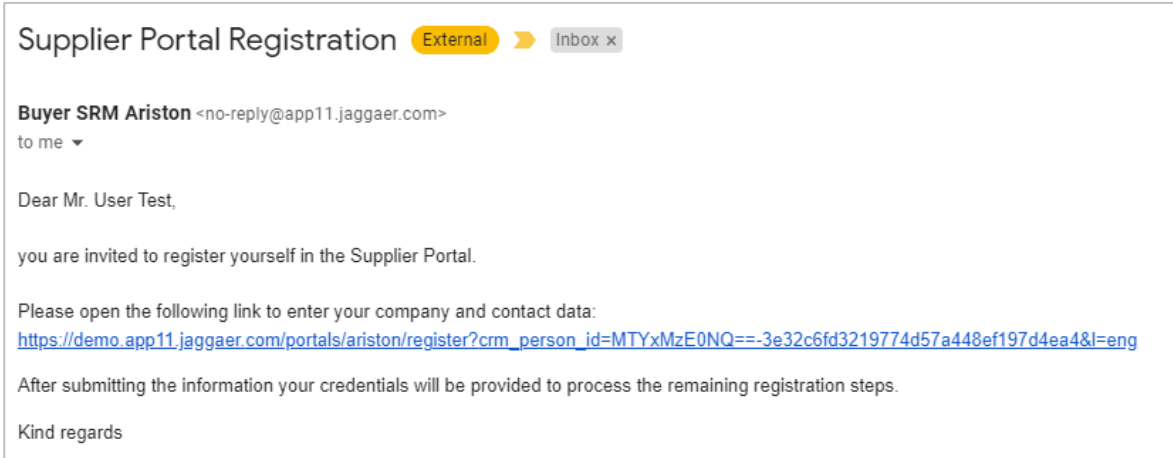
To access the online help:

1. Click the **user icon** in the toolbar, then click the **Help** button in the dropdown.
2. The Support Portal help opens in a new tab.
3. Enter a search term you would like to view more information on (i.e. "RFQ") and click Search. A list of available help pages is displayed.
4. Click on a link from the list of results to view the help page.

4 SUPPLIER PORTAL

4.1 Receipt of an Email Invitation

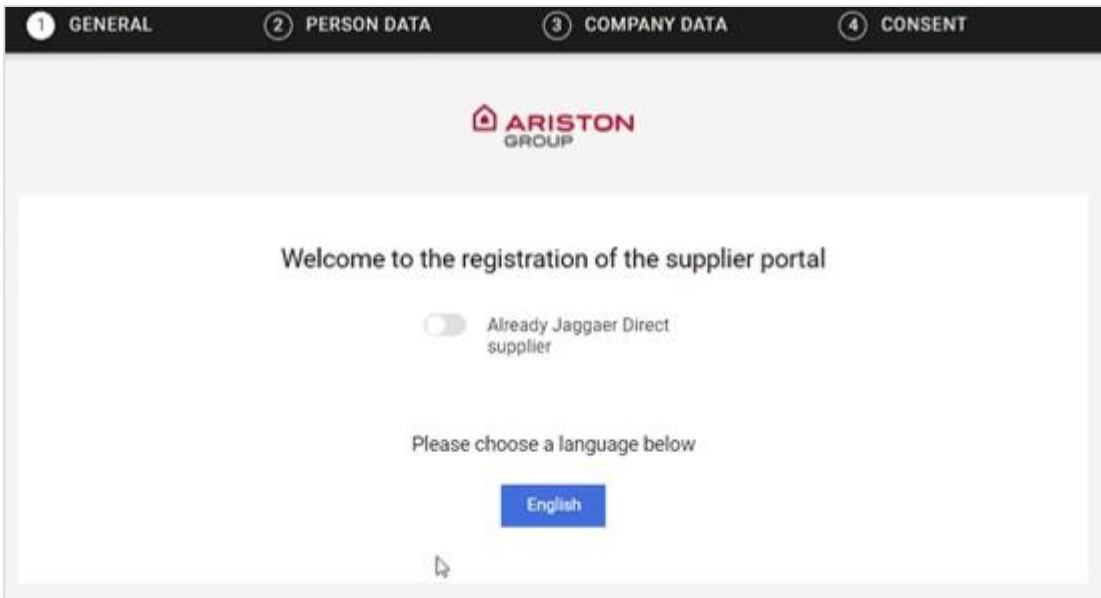
Once buyers invite suppliers to register, they will receive the following email, containing a link to access the portal and proceed with Registration. Proceed with user creation described in the next paragraph.



4.2 User Creation

After clicking on the link in the email, 5 steps will be shown as described below.

General



In this step you can select the predefined English and define if you are already Jagger Direct supplier to login.

Person Data

1 GENERAL 2 PERSON DATA 3 COMPANY DATA 4 CONSENT

CONTACT PERSON

Salutation
Mr.

First name*
User

Last name*
Test

Mobile
+ ... Area Number

Telephone
+ ... Area Number

E-Mail*
john.smith@mail.com
This field is mandatory

Department
...

Loginname*

Back Continue

In this step you can fill your personal data, you need to fill these fields with the information regarding the person who will manage access to the portal as administrator and click on “Continue” button to proceed. This form contains optional and mandatory fields marked with * and you can’t proceed without filling them.

If you are already registered as Jaggaer Direct Supplier, you will find these field prefilled.

NB. “**Loginname**” field will be your access credential.

Company Data

GENERAL PERSON DATA **COMPANY DATA** CONSENT

ARISTON GROUP

COMPANY DATA

Company name*
TestSupplier

Company name 2

Street*
Via Carlo Rossi

Country*
Italy

State / Province* ⓘ

City*

Street-number

Zip code*

Telephone
+ -- Area Number

Homepage
Including http://

E-Mail* ⓘ
john.smith@mail.com

Fax
+ -- Area Number

VAT code

Tax number 1

Tax number 2

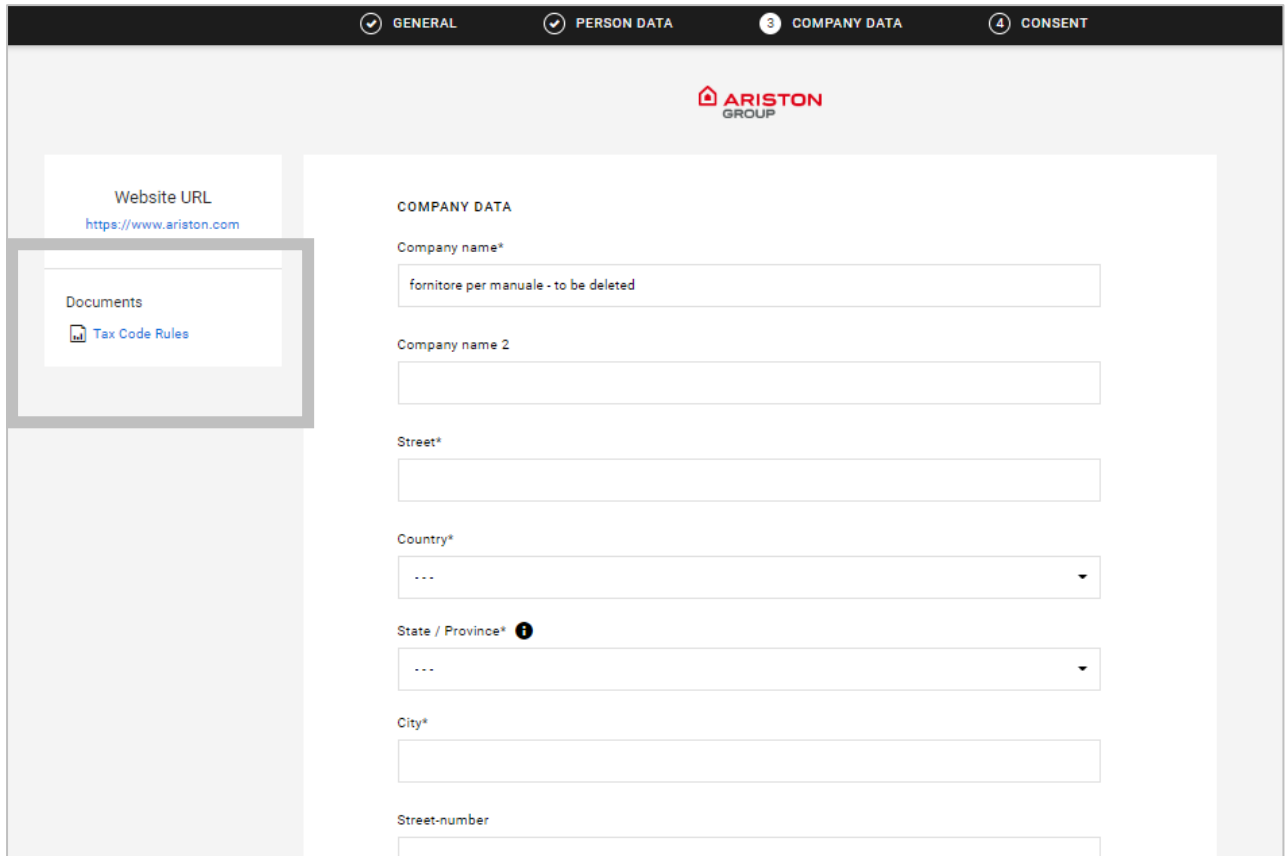
Tax number 3 ⓘ

Tax number 5 ⓘ

Back Continue

In this step you can fill your company data and click on “Continue” button to proceed.

This form contains optional and mandatory fields marked with * and you can't proceed without filling them. **Please pay attention to filling in the fields related to the Tax Number. You can download an Excel file, from the "Document" box on the left side of the page, called "Tax Code Rules", which can be used to understand how these fields should be properly filled in.**

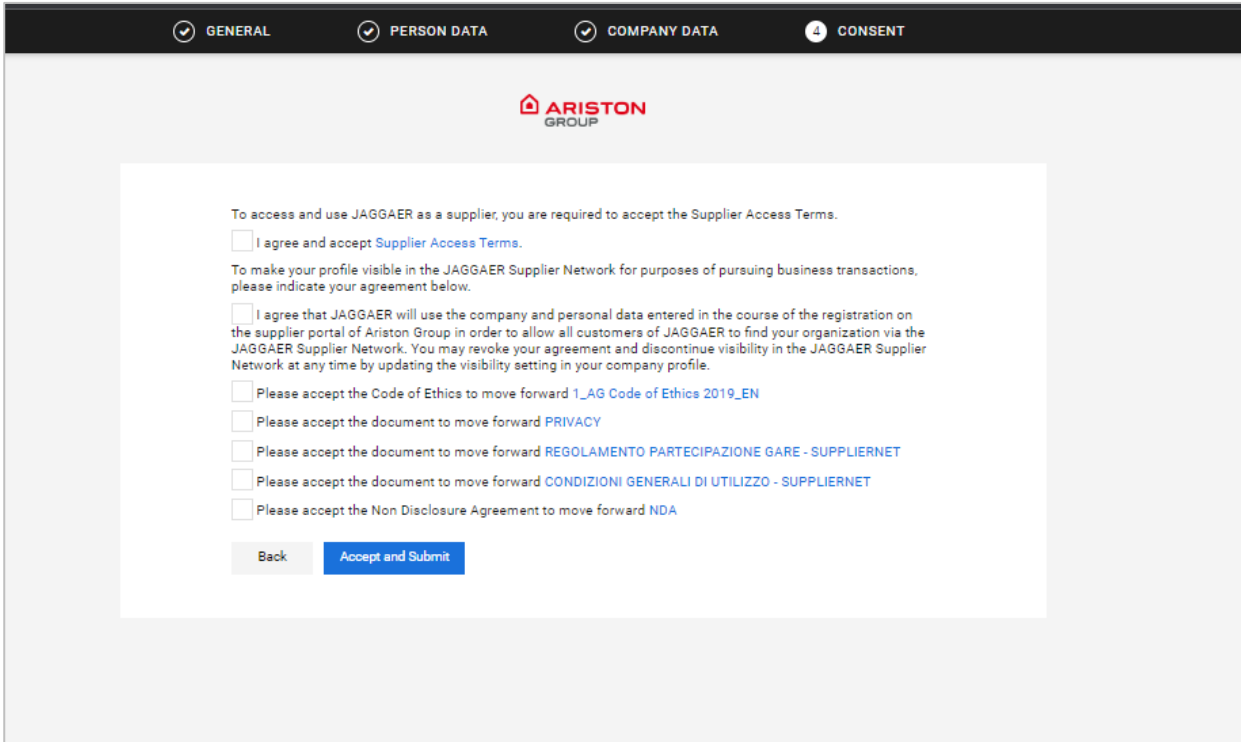


The screenshot shows the 'COMPANY DATA' step of the registration process. The top navigation bar indicates the current step is 3 out of 4. The form fields are as follows:

- Website URL:** <https://www.ariston.com>
- Documents:** [Tax Code Rules](#) (highlighted in a grey box)
- COMPANY DATA:**
 - Company name*:**
 - Company name 2:**
 - Street*:**
 - Country*:**
 - State / Province* ⁱ:**
 - City*:**
 - Street-number:**

NB. In the "Email" field you must enter the generic reference address of the company (e.g. PEC).

Consent



The screenshot shows a registration progress bar at the top with four steps: GENERAL, PERSON DATA, COMPANY DATA, and CONSENT (highlighted with a '4'). Below the progress bar is the ARISTON GROUP logo. The main content area contains the following text and form elements:

To access and use JAGGAER as a supplier, you are required to accept the Supplier Access Terms.

I agree and accept [Supplier Access Terms](#).

To make your profile visible in the JAGGAER Supplier Network for purposes of pursuing business transactions, please indicate your agreement below.

I agree that JAGGAER will use the company and personal data entered in the course of the registration on the supplier portal of Ariston Group in order to allow all customers of JAGGAER to find your organization via the JAGGAER Supplier Network. You may revoke your agreement and discontinue visibility in the JAGGAER Supplier Network at any time by updating the visibility setting in your company profile.

Please accept the Code of Ethics to move forward [1_AG Code of Ethics 2019_EN](#)

Please accept the document to move forward [PRIVACY](#)

Please accept the document to move forward [REGOLAMENTO PARTECIPAZIONE GARE - SUPPLIERNET](#)

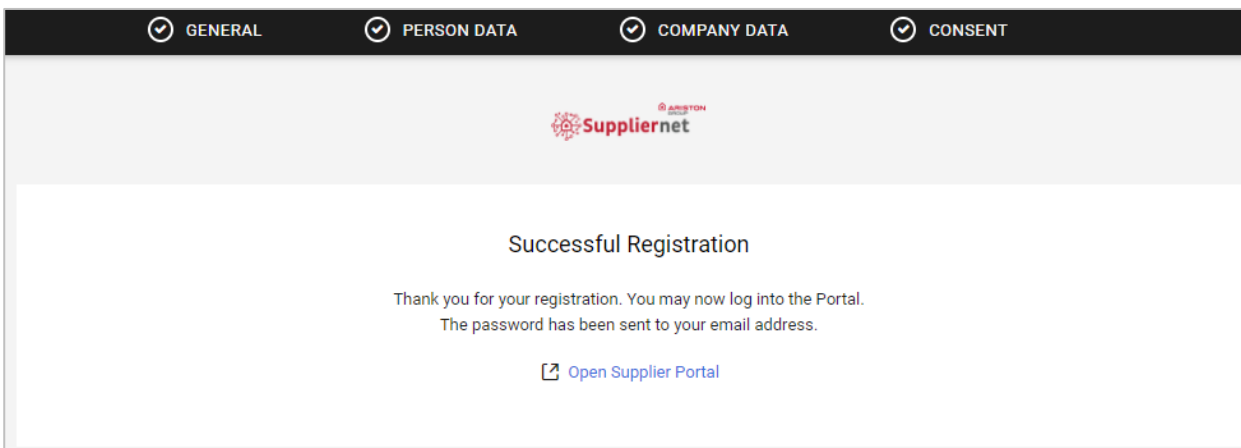
Please accept the document to move forward [CONDIZIONI GENERALI DI UTILIZZO - SUPPLIERNET](#)

Please accept the Non Disclosure Agreement to move forward [NDA](#)

At the bottom, there are two buttons: "Back" and "Accept and Submit".

Select the boxes to agree and accept required condition and click on “Accept and Submit” button.

After accepting the conditions and completing all the steps, the confirmation screen is shown with a link to open Supplier Portal, and you will receive an email containing your credential (Login name defined during registration and temporary password).



The screenshot shows the same progress bar at the top, with all four steps (GENERAL, PERSON DATA, COMPANY DATA, and CONSENT) now marked with checkmarks. Below the progress bar is the Suppliernet logo. The main content area displays the following text:

Successful Registration

Thank you for your registration. You may now log into the Portal.
The password has been sent to your email address.

At the bottom, there is a blue button with a link icon and the text "Open Supplier Portal".

You have the possibility to access to the portal clicking on “**Open Supplier Portal**” or with the link contained in the confirmation email.

You will have to enter the login name and the temporary password received in the confirmation email, and then, the system asks you immediately to create your own password to use for subsequent accesses.

Your registration in the Supplier Portal External Inbox x

no-reply@app11.jaggaer.com <no-reply@app11.jaggaer.com>
to me ▾

Dear Mr. User Test,

thank you for your registration!

You can log in using the following link: <https://demo.app11.jaggaer.com/portals/ariston/>

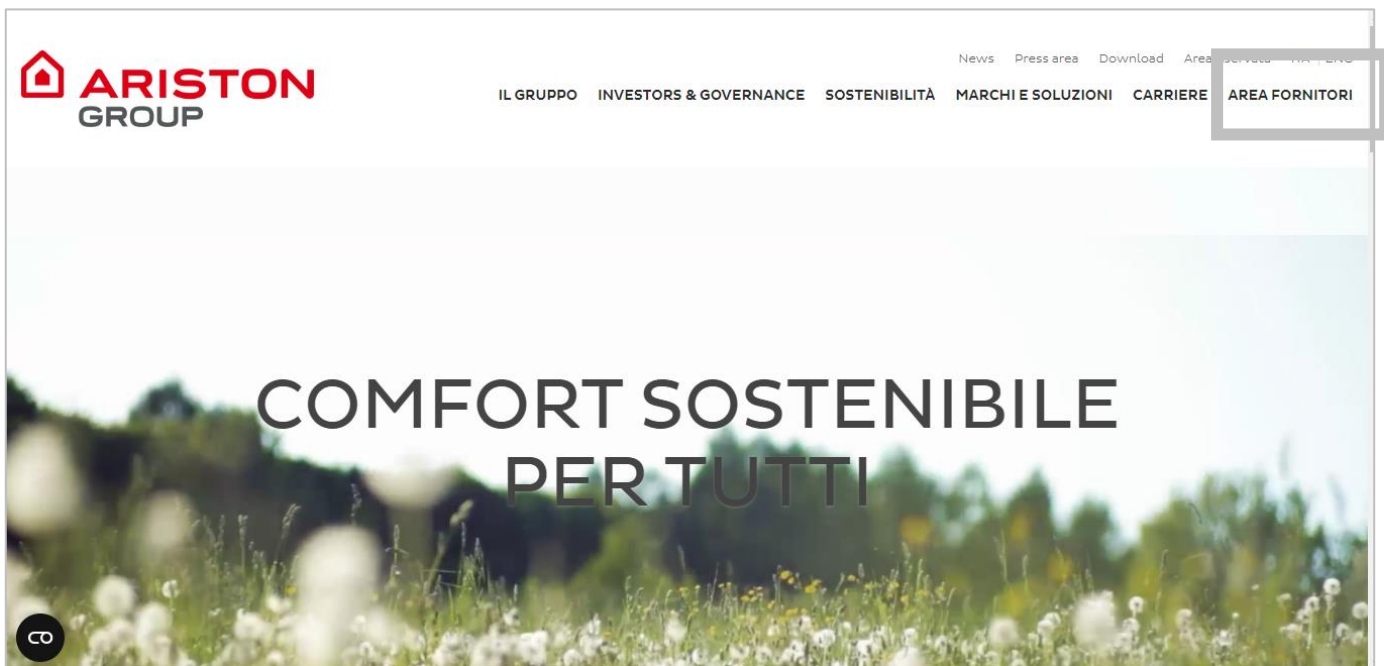
Username: ██████████

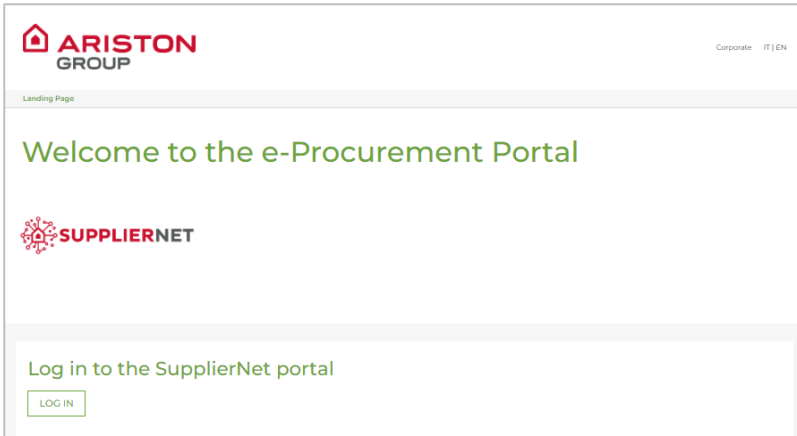
Password: ██████████

Please fill in all additional required data to complete the registration process.

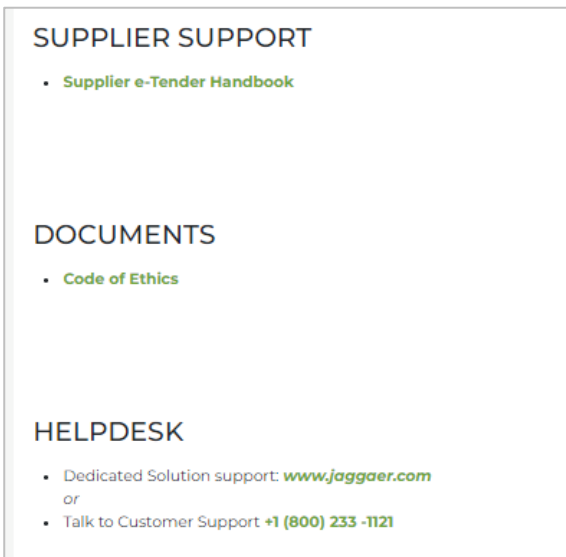
Kind regards

Once you have created your own credentials, you will also be able to access the Portal also through the Ariston Group’s institutional website, in the dedicated “Supplier Area” section, as shown on the following screens.



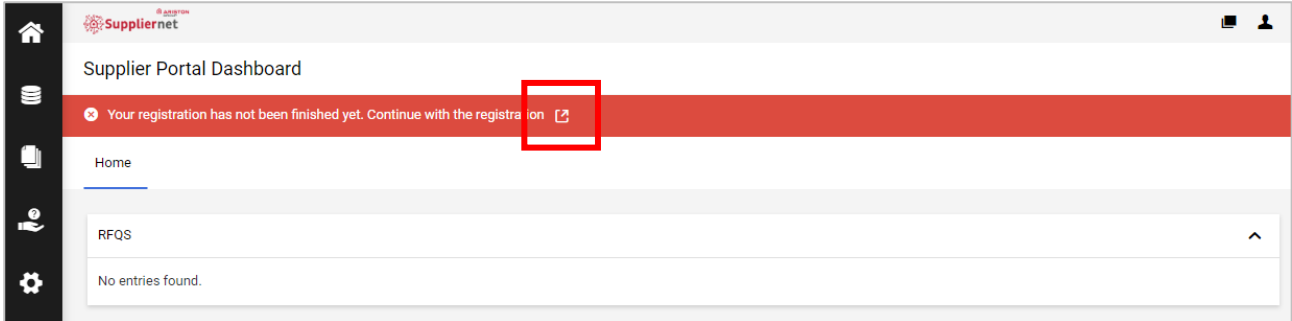


On this page you can also access some supporting documents (manual and code of ethics) and helpdesk contacts.



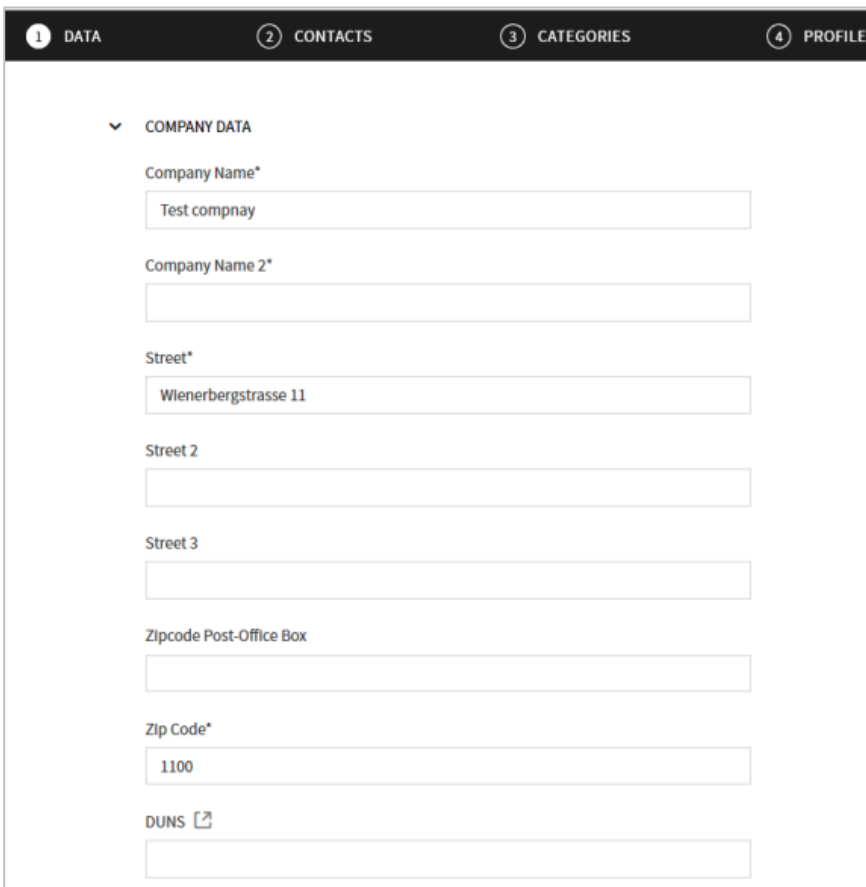
5 SUPPLIER REGISTRATION – SMALL PROFILE

Click the icon in the red highlighted message in the **Supplier Portal Dashboard** to enter the individual registration steps.



Four tabs must be filled out before the supplier can publish their profile.

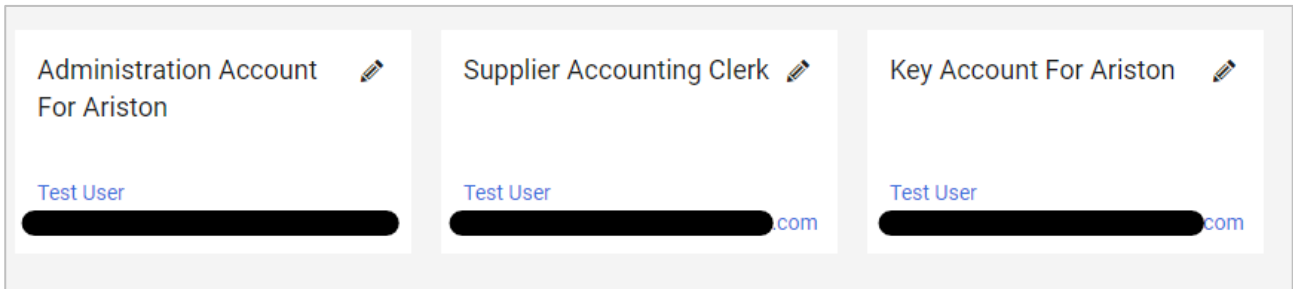
5.1 Data



The screenshot displays the 'DATA' tab of the registration process. The top navigation bar includes four tabs: '1 DATA', '2 CONTACTS', '3 CATEGORIES', and '4 PROFILE'. The 'DATA' tab is active. Below the navigation bar, there is a section titled 'COMPANY DATA' with a dropdown arrow. The form contains several input fields: 'Company Name*' with the value 'Test compnay', 'Company Name 2*', 'Street*' with the value 'Wienerbergstrasse 11', 'Street 2', 'Street 3', 'Zipcode Post-Office Box', 'Zip Code*' with the value '1100', and 'DUNS' with a small icon.

General company data must be confirmed, updated, or completed. Confirm your entry by clicking the **Continue** button in the toolbar.

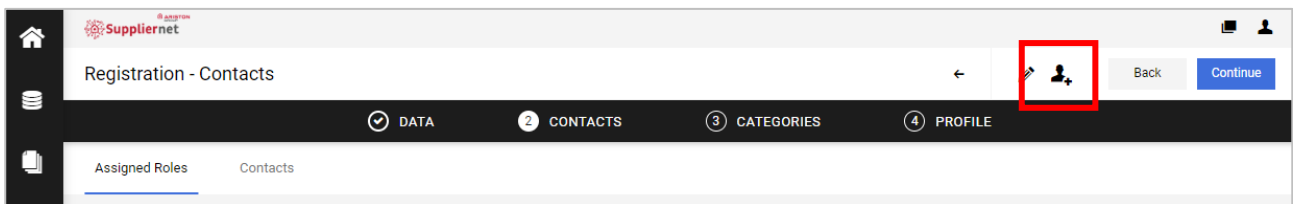
5.2 Contacts



The second step requires the assignment of single departments or working areas to their responsible contacts. At this point, the supplier can add additional persons who are in charge of the listed modules. Every module gets the registered contact person by default, defined as portal administrator for the supplier (refer to section 4.3 Person Data).

Entries can be edited by clicking the **Edit** (pencil) icon. This opens the Assign Company Roles pop-up. On the left-hand navigation tree is a list of all available modules / working areas. On the right, the buyer group and the responsible person can be changed. You can only select between registered names.

Add Additional Contacts

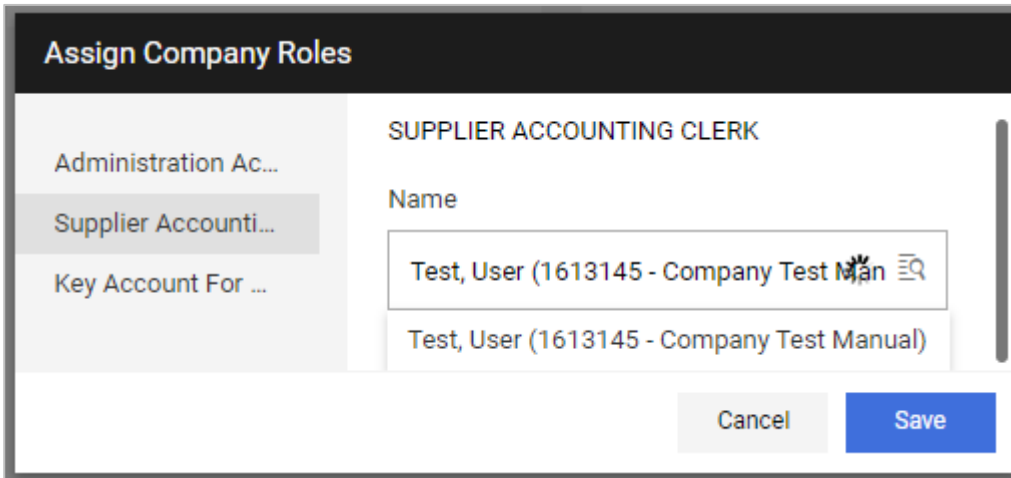


To add additional contacts:

1. Click the **Add New Contact** button in the toolbar. After confirming to add a new contact, the Add New Contact page opens.
2. Complete the appropriate fields. Mandatory fields are marked with *.
3. When you set the **Portal Access** toggle to active, this form gains an additional field, asking for a login name and permission settings. This user will receive an email containing his credential (Loginname and temporary password). Once access the portal he will have to enter the login name and the temporary password received in the email, and then, the system asks immediately to create his own password to use for subsequent accesses.
4. Click **Save** in the toolbar. The additional contact is saved and you are returned to the Registration Contacts page. The additional contact is assigned to the supplier and can now be assigned to the different working areas.

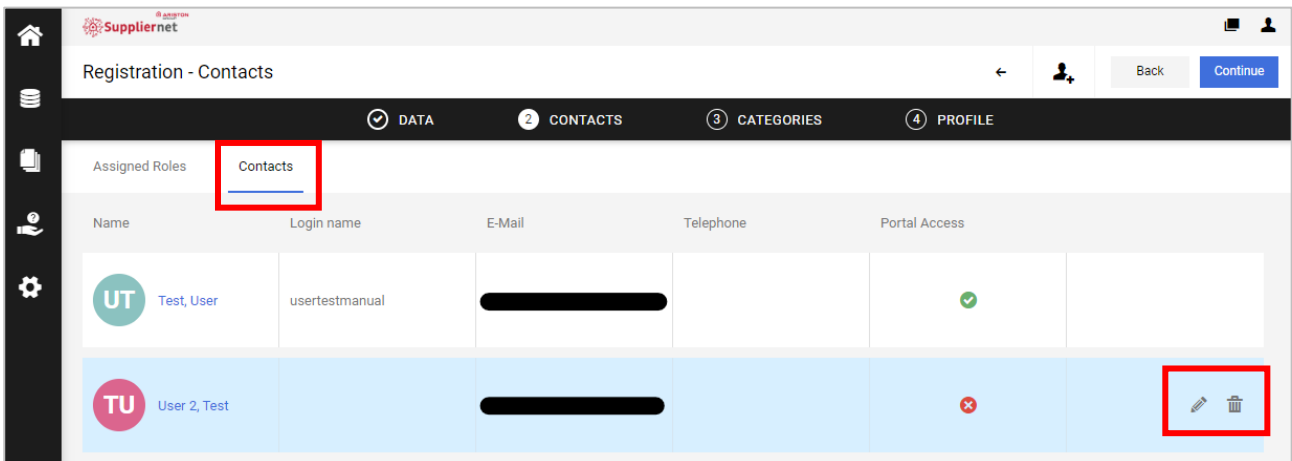
NB. Even if new users are created, the next steps of registration still remain in charge of the portal administrator user.

Assign Additional Contacts to Working Areas



1. Assign the additional contact to working areas:
2. Select the module you want to assign the contact to and click the **Edit** icon in the toolbar or the **Edit** icon on the module. The Assign Company Roles pop-up opens.
3. On the Assign Company Roles pop-up:
 - a. The left-hand navigation tree is a list of all available assignments.
 - b. On the right, select the responsible contact person for the module in the **Name** field.
4. Click **Save**. The pop-up closes and you are returned to the Registration Contacts page.

Contacts List



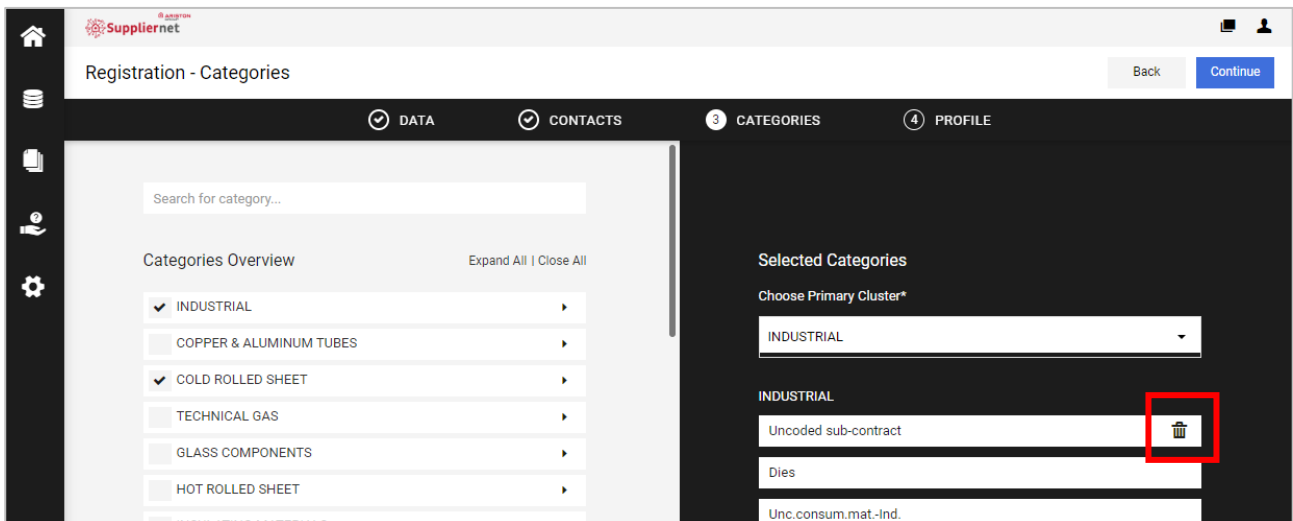
The Contacts sub-tab under Contacts contains a list of all registered contacts, and includes their usernames, login names, email addresses, telephone numbers, and portal access status.

Hovering over a listed contact causes the Edit and Delete icons to appear.

NB. In the contacts section there may be internal Ariston codes that correspond to the reference buyers

After finishing with the Contacts tab of registration, click **Continue** to advance to the Categories tab.

5.3 Categories



The third tab, Categories, requires the supplier to select those categories they are able to produce or deliver. On the left side, the overview of the categories is displayed.

NB. Buyer could suggest a Macrocategory. In this case you will find flagged the Macrocategory suggested by the buyer in the left part of the screen, and you will have to confirm it in the right part of the screen, as "Primary Cluster".

Selecting one of the main categories causes all subcategories to display on the right side of the window.

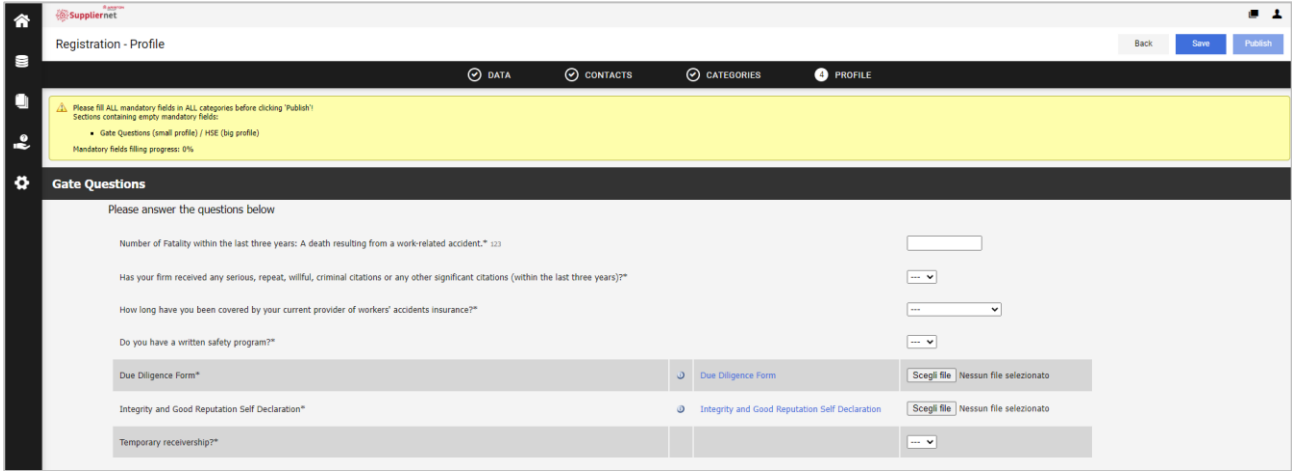
The subcategories are displayed by default. If the supplier is unable to deliver one or more of these subcategories, they can delete them from the list by hovering over each one and clicking the **Delete** (trash) symbol which appears.

Other categories can be searched for with the Search field.

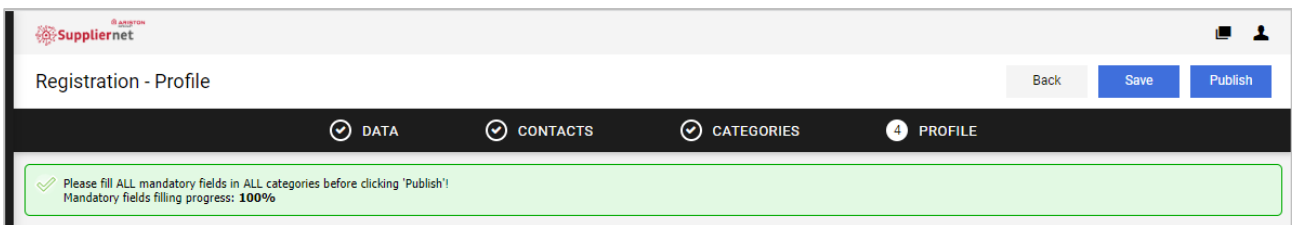
Click **Continue** to advance to the Profile tab.

5.4 Profile

NB. These Small Profile registration section will be required **only for new supplier**, if you are already working with Ariston, you can proceed with Big Profile registration (section 6 of this manual).



The Profile tab consists in a Gate Questions list to be filled.



After entering all required information, the profile can be saved. After saving, the profile can then be published by clicking the Publish button in the toolbar. A pop-up opens to confirm publishing the profile.

After publishing the profile, you are informed that registration is now reviewed and, in a few minutes, you will receive a notification of the small profile approval containing a link to access the portal to continue the big profile registration.

Proceed to Paragraph 6 for more details.

Approval of the small profile

External



Inbox x

no-reply@app11.jaggaer.com <no-reply@app11.jaggaer.com>
to me ▾

Dear Mr. User Test,

the small profile has been checked and approved.

Please open the following link to continue the registration process by entering the big profile:

<https://demo.app11.jaggaer.com/portals/ariston/>

Kind regards

If the parameters entered are not defined by Ariston requirements, you will receive an email notification that will inform you of the refusal of your registration.

Your registration for the Supplier Portal

no-reply@app11.jaggaer.com <no-reply@app11.jaggaer.com>
to me

Dear [REDACTED]

thank you for your registration.

Unfortunately, your company [REDACTED] srl application for admission to the Supplier Portal has been declined.

Kind regards

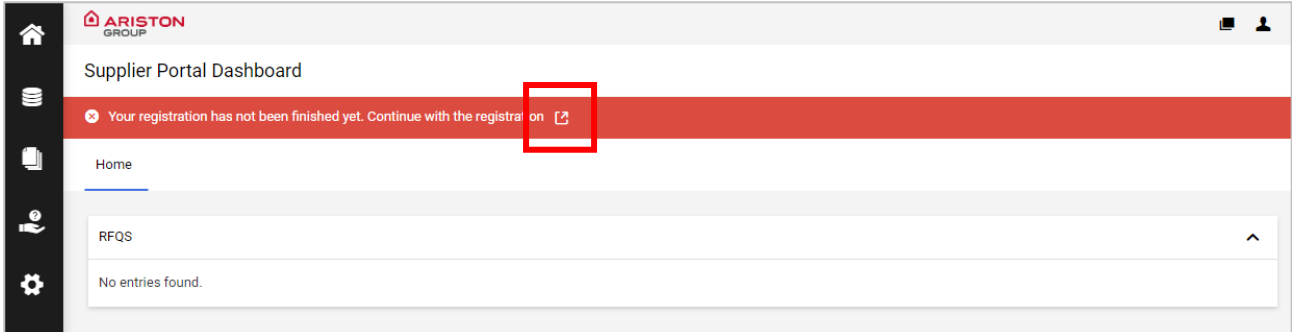
↩ Reply

↩ Reply all

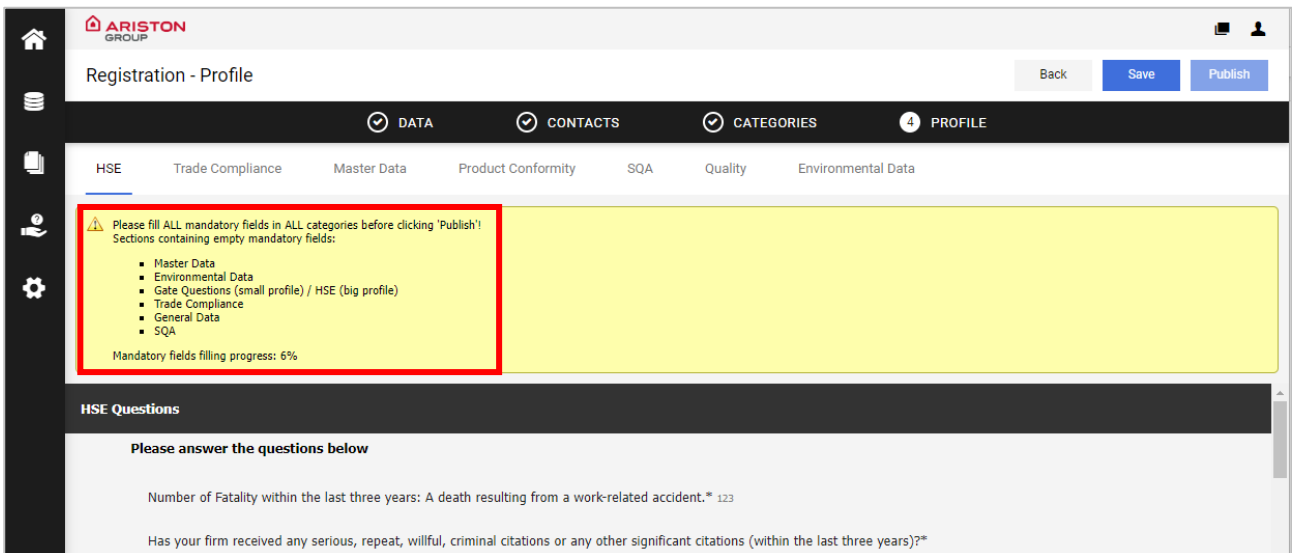
➦ Forward

6 SUPPLIER REGISTRATION – BIG PROFILE

Once access to the system, click the icon in the red highlighted message in the **Supplier Portal Dashboard** to enter the individual registration steps.



Different tabs must be filled out before the supplier can publish their profile.



Big profile is structured with the following different tabs:

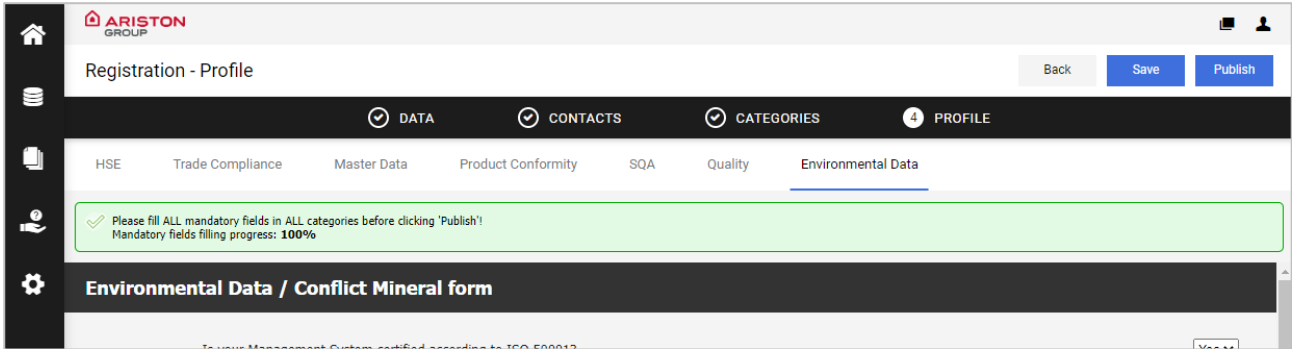
- *HSE*
- *TRADE COMPLIANCE*
- *MASTER DATA*
- *PRODUCT CONFORMITY (visible only for some specific macrocategories selected)*
- *SQA (visible only for some specific macrocategories selected)*
- *QUALITY*
- *ENVIRONMENTAL DATA*

Each tabs contains optional and mandatory field (marked with an asterisk).

The yellow banner always shows you the percentage of mandatory questions not yet filled and the reference to the relative section.

It is not necessary to fill out all the questionnaire from beginning to end, you can also save (using the "Save" button) and resume the compilation at the next login.

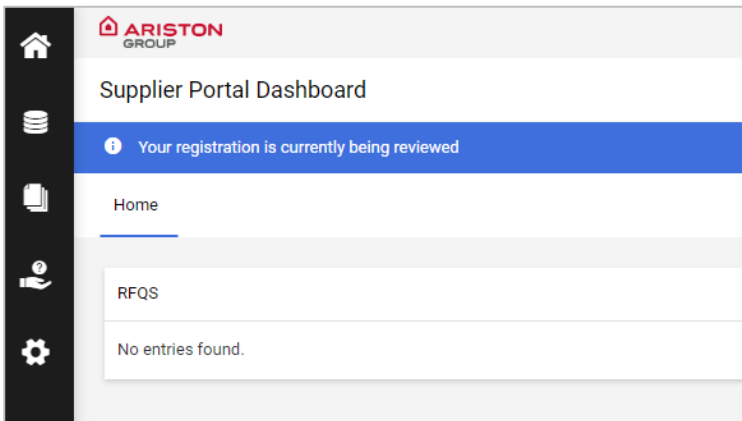
You can skip from one tab to another without necessarily following the default order, the important thing is to save the changes made before changing tab.



After entering all required information, the system shows a green pop up confirmation with message "Mandatory fields filling progress: 100%" and the profile can be saved. After saving, the profile can then be published by clicking the Publish button in the toolbar. A pop-up opens to confirm publishing the profile.

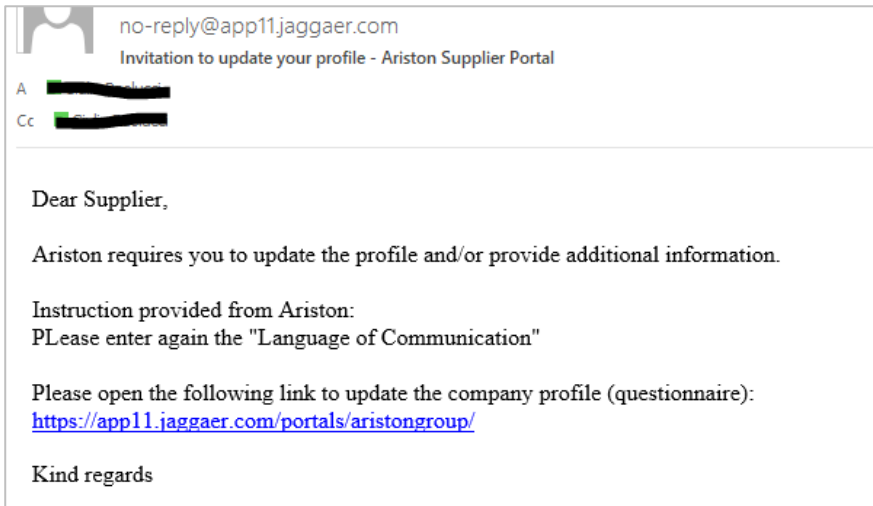
After publishing the profile, the questionnaire will be blocked, and no further changes can be published until the approval by Ariston.

You will still have access to the questionnaire to view the published information, but they will not be editable.



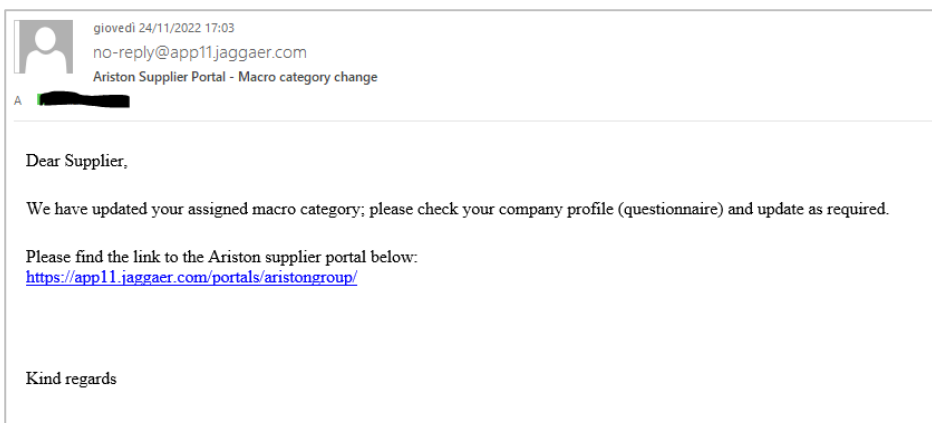
You are informed with the blue banner that registration is being reviewed by Ariston Group.

Subsequently, you may receive a notification email in which Ariston asks for more information, to update some data or to integrate missing data, as shown below.



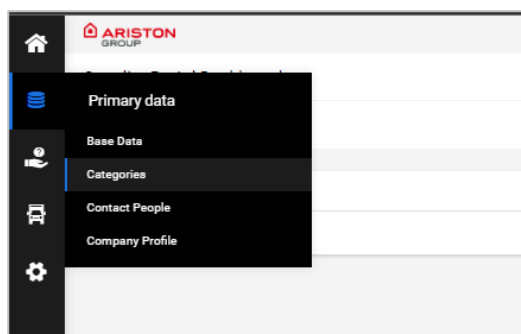
You can click on the link in the email to access the system and to make the required changes to your profile. When you have updated/added all the required information, you can publish again your profile.

It is also possible that the buyer, after finding that the macrocategory chosen is not correct, will update it and propose a different one. In this case you will receive the following notification email:

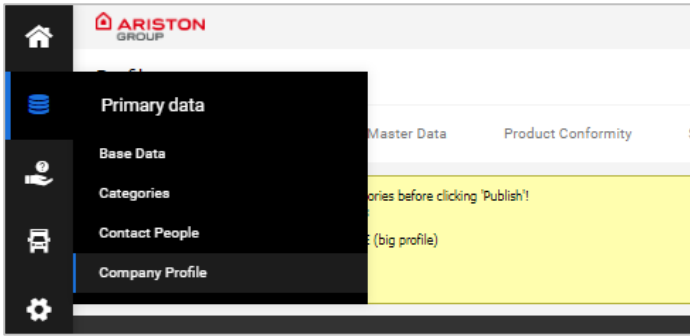


You can click on the link in the email to access the system and:

- Confirm the new macrocategory suggested by the buyer, as described in the paragraph 5.3, by going to the "Categories" section under Primary Data;



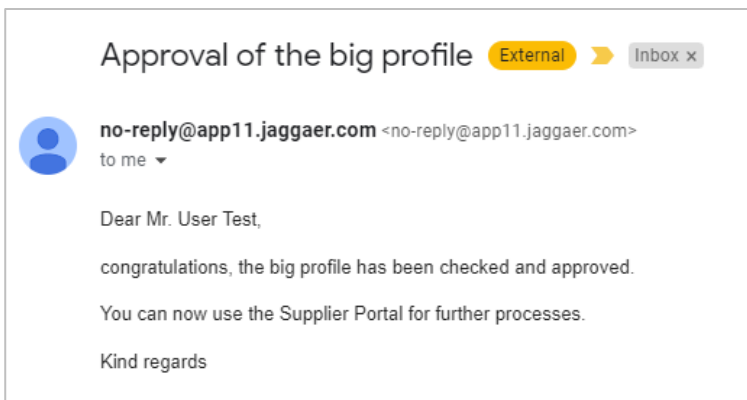
- Check if there are any new fields to be filled in the "Company Profile" section under "Primary Data".



Once both of the above checks have been performed, you can publish your profile again.

Then, at the end of the Ariston approval, you will receive an email confirmation.

In case the information entered complies with the Ariston requirements, you will receive the following confirmation email.



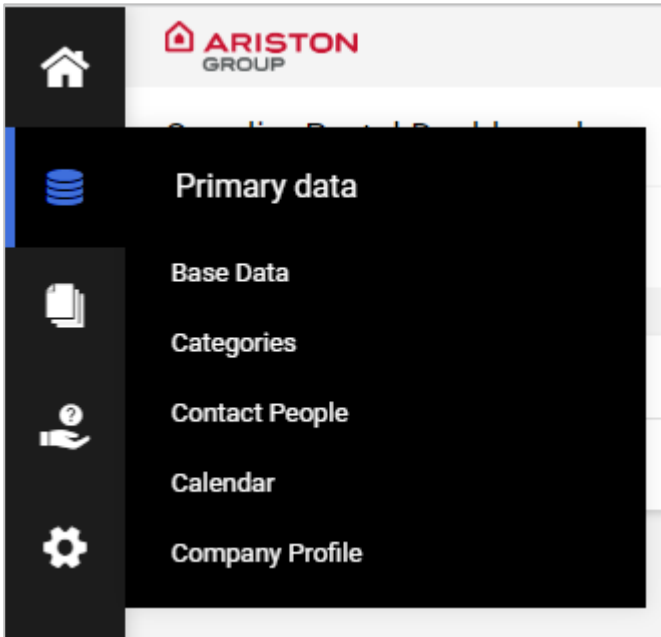
If the parameters entered are not defined by Ariston requirements, you will receive an email notification that will inform you of the refusal of your registration.

7 SUPPLIER REGISTRATION – PROFILE CHANGES

Once your registration has been approved it will be possible to changes your information. Any change will be evaluated by Ariston.

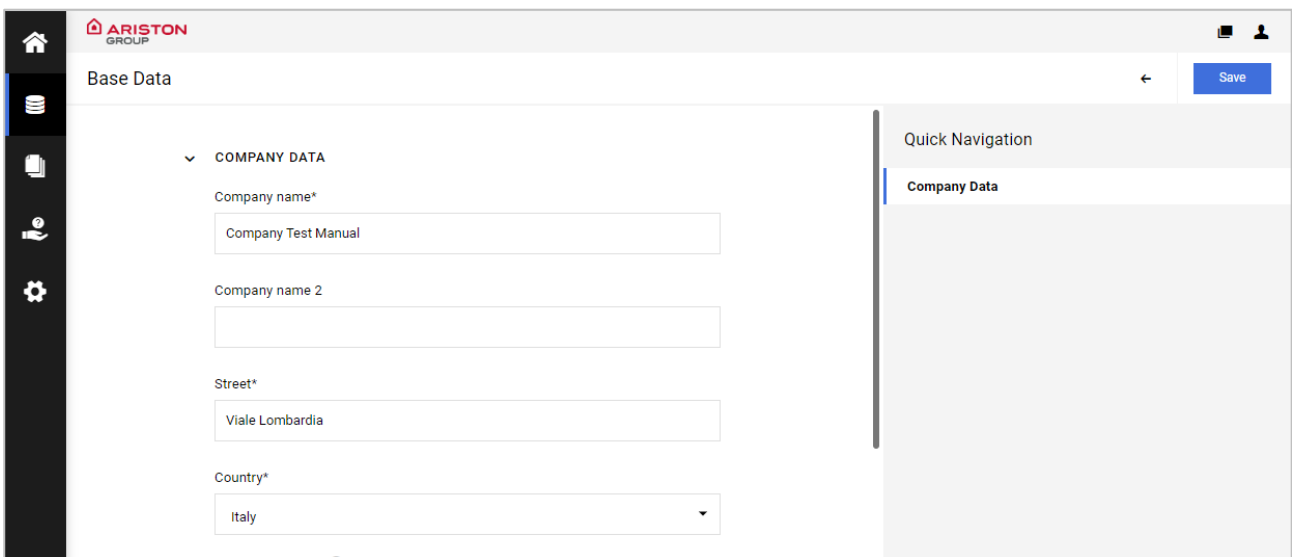
You will access the portal via the supplier link or directly from the Ariston website on the dedicated page and the following dashboard will be shown.

Select “Primary data” icon as shown in the following screen and then select the section you want to edit, below some details.



7.1 Base Data

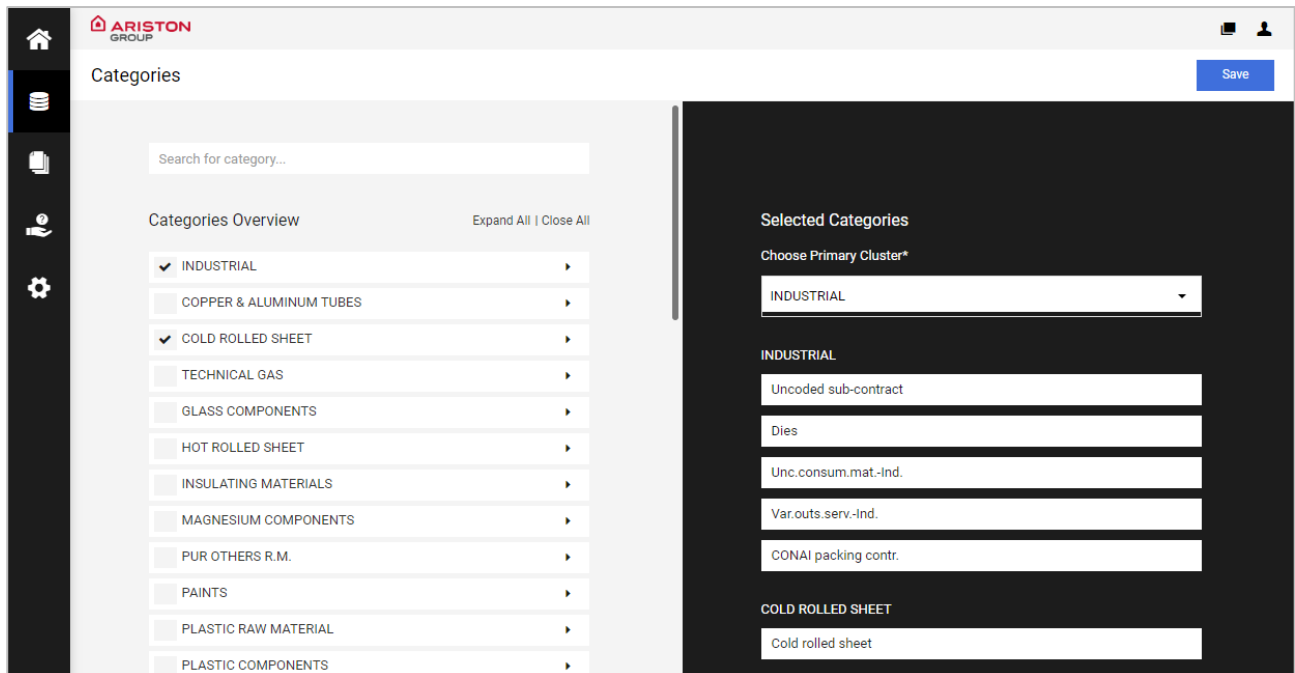
In the Base Data section, you have the possibility to edit yours Company Data.



Once the changes are complete click on the "Save" button to confirm.

7.2 Categories

In the Categories section, you have the possibility to edit yours Categories selected during registration process.

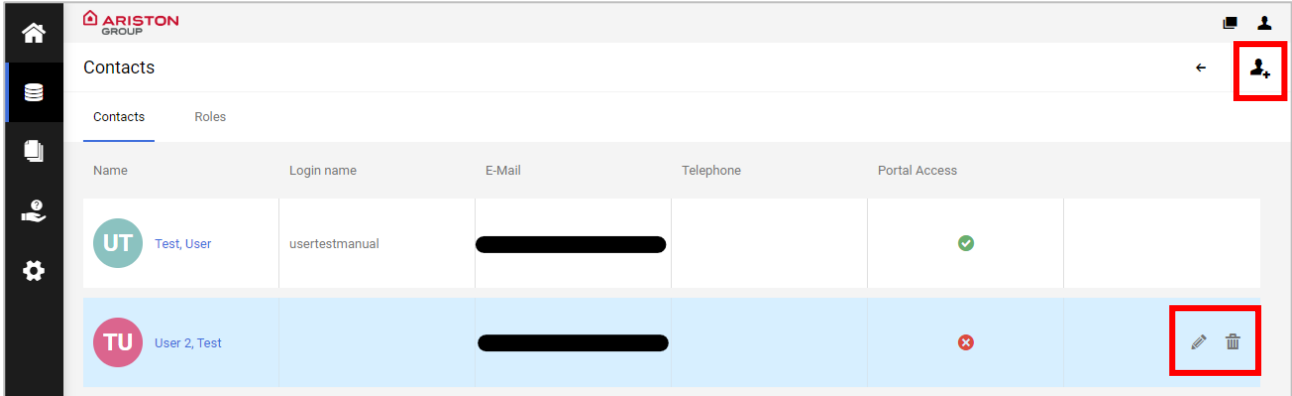


Once the changes are complete click on the "Save" button to confirm.

7.3 Contact People

In the Contact People section, you have these possibilities:

- **Contacts:** to edit or delete an existing contact or to create new one with buttons shown in the following screen.
- **Roles:** to edit users assigned to a specific role or to add a new contact as responsible person for a specific role.



Name	Login name	E-Mail	Telephone	Portal Access
UT Test, User	usertestmanual	[REDACTED]		✓
TU User 2, Test		[REDACTED]		✗

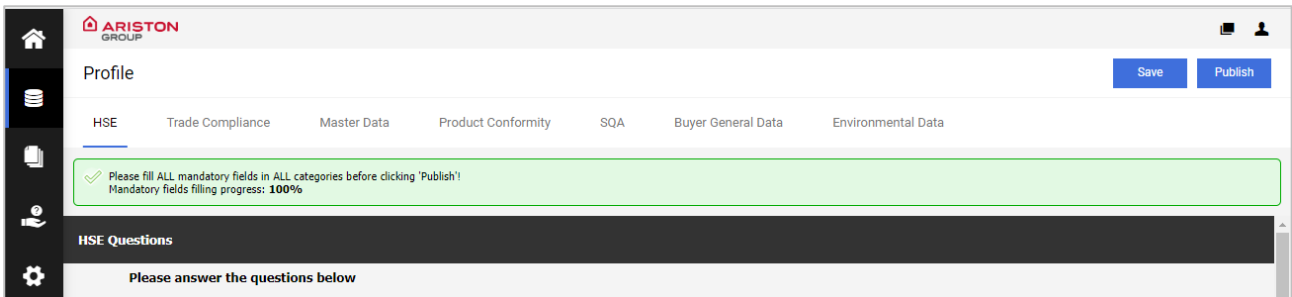
7.4 Company Profile

In the Company Profile section, you have the possibility to edit the big profile questions structured with the following different tabs:

- HSE
- TRADE COMPLIANCE
- MASTER DATA
- PRODUCT CONFORMITY (visible only for some specific macrocategories selected)
- SQA (visible only for some specific macrocategories selected)
- QUALITY
- ENVIRONMENTAL DATA

When all changes have been made, you can confirm the changes by clicking on the "Publish" button

Note: Once the questionnaire is submitted, it will be closed, and it **will not be possible** to make further changes until Ariston's approval is complete. In case you need to make more than one change, click on the "Save" button and go to the next tab, click on the "Publish" button when you have completed all the changes you want.



Profile

Save Publish

HSE Trade Compliance Master Data Product Conformity SQA Buyer General Data Environmental Data

✓ Please fill ALL mandatory fields in ALL categories before clicking 'Publish'!
Mandatory fields filling progress: 100%

HSE Questions

Please answer the questions below