OSHKOSH

SRM Profile Changes

SRM Profile Changes

The JAGGAER Supplier Relationship Management (SRM) module supports easy onboarding of suppliers in the Supplier Portal through supplier completed questionnaires. JAGGAER offers suppliers the opportunity to easily maintain their own information in one online location.

This job aid covers the following scenarios:

Page #	Scenario
1	Change Base Data
3	Change Category Selections
4	Add or Change Contacts & Roles
7	Change Company Profile

Continue here if you have been onboarded for RFQ or PO and need to make changes to your Base Data.

1. Click on **Primary Data**, then select **Base Data**.
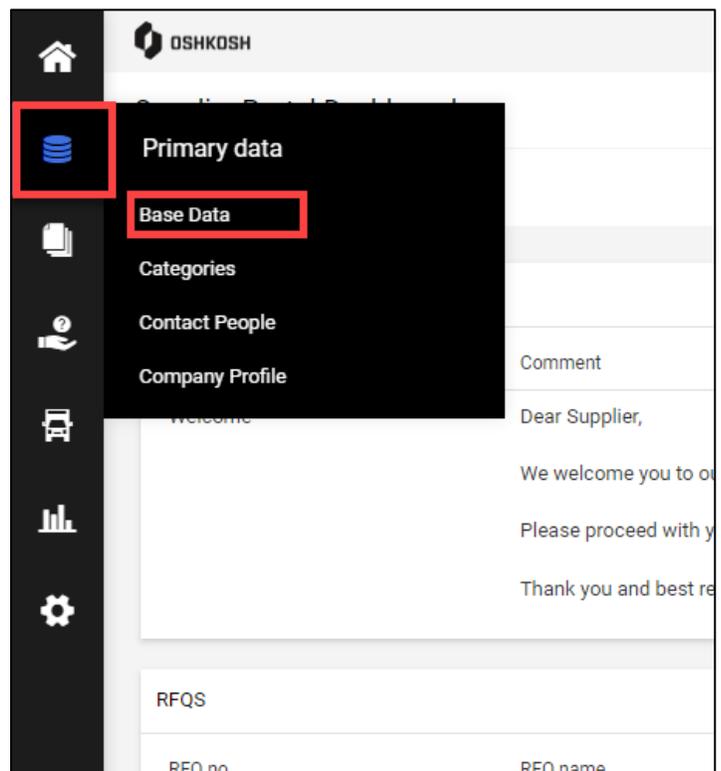
SRM Profile Changes

2. Make changes as needed.

3. Click **Save**.

4. Oshkosh will review your base data changes. If corrections are needed, an email will be sent to you.

OSHKOSH™

SRM Profile Changes

Continue here if you have been onboarded for RFQ or PO and need to make changes to your Categories.	
5. Click on **Primary Data**, then select **Categories**.	
6. To add categories, **check** additional boxes in the Categories Overview. Use the arrow on the right of the category to view the sub-categories.	
7. To deselect categories, hover over a Selected Category and click the 🗑 icon or **uncheck** boxes.	
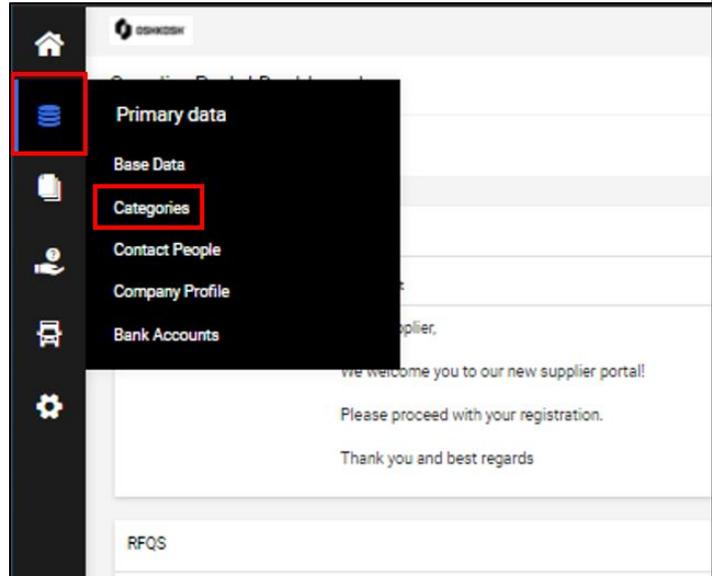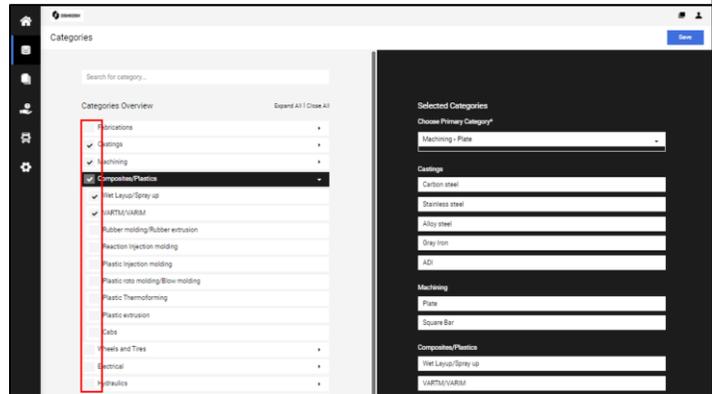
OSHKOSH™
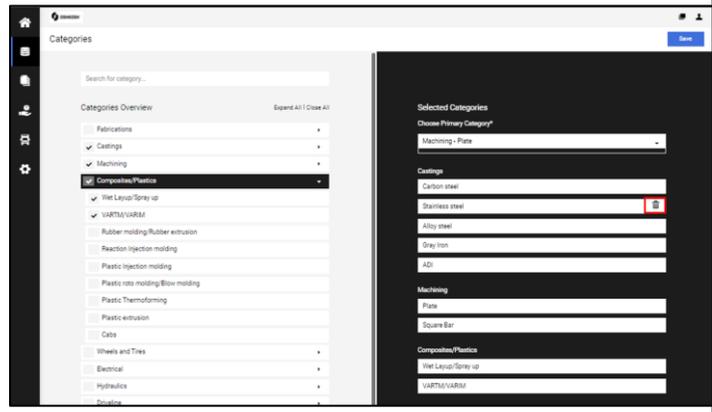
SRM Profile Changes

8. To select a new primary category, click on **Choose Primary Category**, then click on the appropriate category. 9. Click **Save**.	
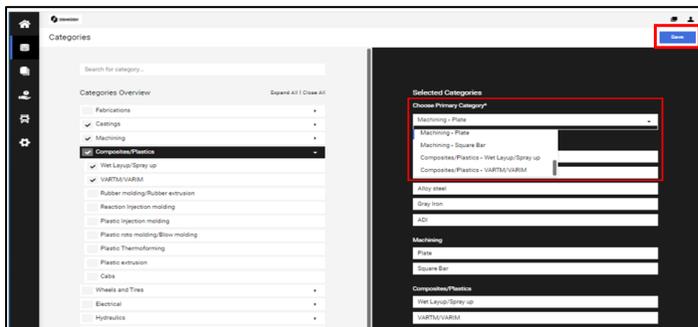
Continue here if you have been onboarded for RFQ or PO and need to make changes to your Contact Role assignments or add an additional user.

10. Click on **Primary Data**, then select **Contact People**.	
11. To add a new user, click on the ![icon] icon.	
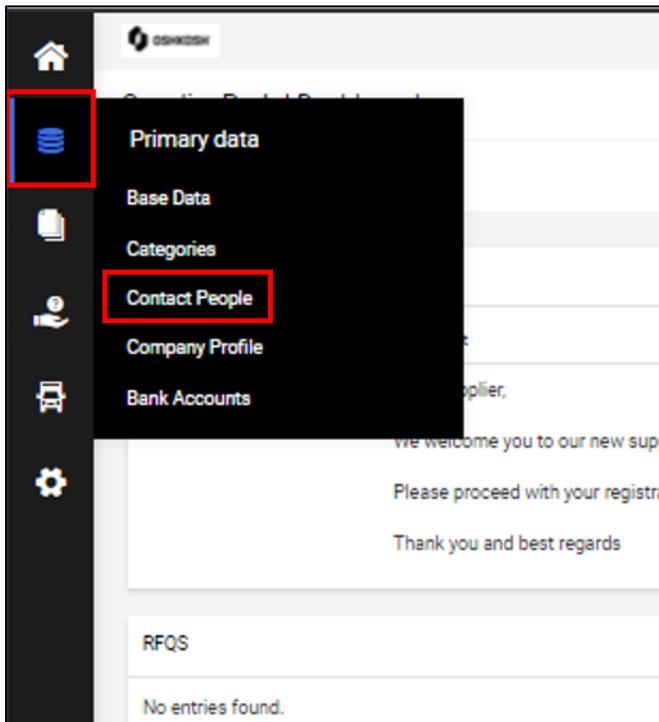
OSHKOSH™

SRM Profile Changes

12. Fill out all the following mandatory fields:
    - First name
    - Last name
    - Telephone
    - E-Mail
    - Portal Access (Toggle switch to blue)
    - Check Box "Oshkosh Supplier Portal ACL"
    - The email given on this page will be used for login.

13. Click **Save**.

14. Inform the new user that they will receive an email from Jaggaer with login instructions.

15. To change role assignments, click on **Roles** at the top**.**

16. To update Assigned Roles, click on the ✎ icon.
    Note: Effects of certain roles listed below:
    - *Sourcing* –Answer and respond to any electronic RFQs regardless of segment
    - *Profile* – Maintain and adjust supplier profile for your company
    - *Order Confirmation* – Contact will confirm and change PO's
    - *Company President* – Name of company president
    - *Payment* – View payments, receipts, & invoices
    - *Defense Sourcing Contact* – Answer and respond to any electronic RFQs for Defense only. Can only be one

Printed Copy is Uncontrolled

OSHKOSH

SRM Profile Changes

person but if they are not available will move to main sourcing lint of names *Note*: More than one user must be registered to change assigned role.	
17. To change the user assigned to a role, enter the name of the user in the **Name** field. 18. Click **Save**.	**Assign Company Roles** Sourcing Profile Order Confirmation Company President Payment Defense Sourcing Contact + Add Another Responsibility SOURCING Name* Cancel Save
19. To assign the role to an additional user, click + Add Another Responsibility *Note*: Not all roles can be assigned to multiple users. 20. Start typing in the **Name*** field to search for a user, then click to select. 21. Click **Save**.	**Assign Company Roles** Sourcing Profile Order Confirmation Company President Payment Defense Sourcing Contact + Add Another Responsibility SOURCING Name* 3251887 - Price, Austin SOURCING 🗑 Name* Cancel Save
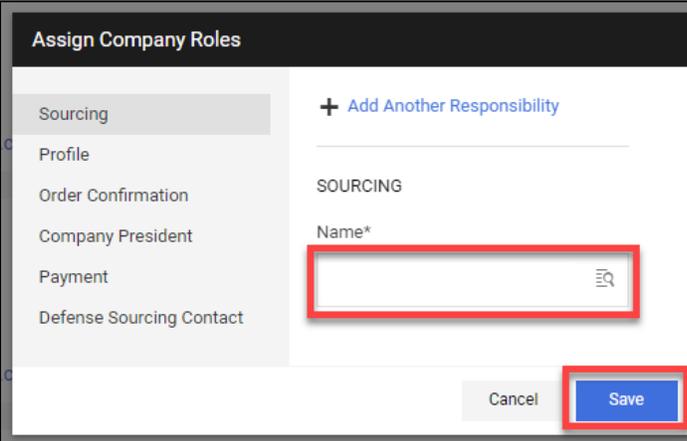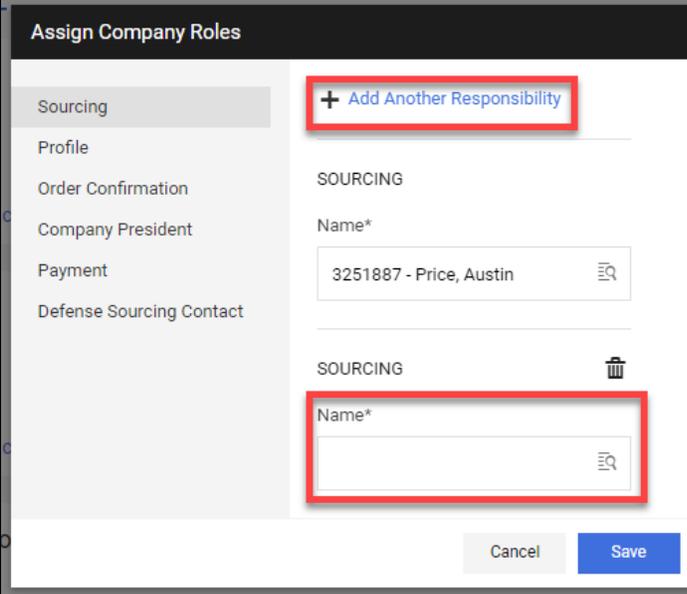
OSHKOSH™

SRM Profile Changes
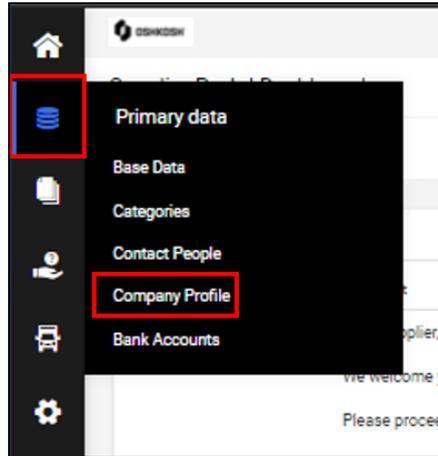
Continue here if you have been onboarded for RFQ or PO and need to make changes to your Company Profile.	
22. Click on **Primary Data**, then select **Company Profile**.	
23. Make changes to fields as needed. Before switching tabs, click **Save**. 24. When changes are made, click **Publish**. Note: Changes to certain fields on the supplier profile will require Oshkosh approval.	