OSHKOSH

SRM Profile Creation

Introduction

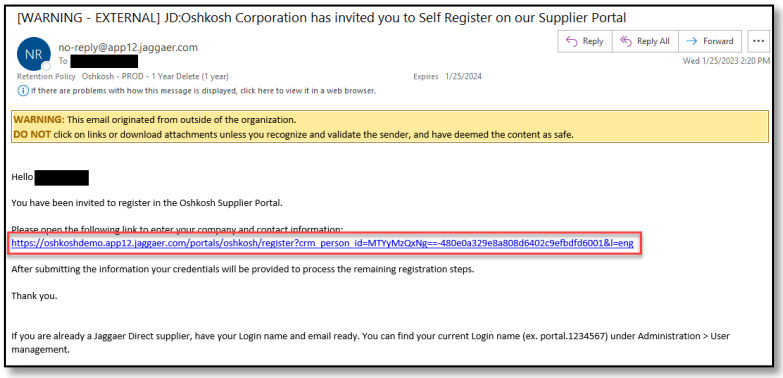
In 2022 Oshkosh Corporation went live with a new Supplier Portal, Jaggaer. All purchase orders are being sent through this portal so it is a requirement that every Oshkosh Corporation supplier onboard on to Jaggaer. Non-compliance will prevent Oshkosh from being able to conduct business with the supplier.

Initial Supplier Setup	Pages 1-11
Adding, Editing, & Removing Contacts	Pages 11-12
Roles & Responsibilities	Page 13

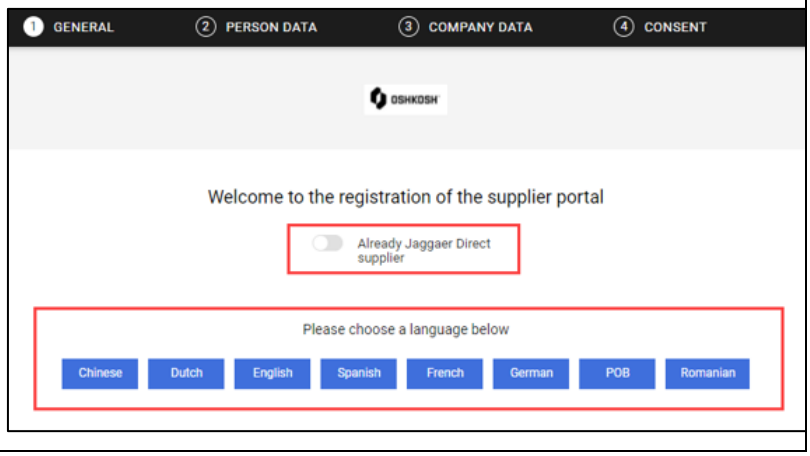
On-boarding Process

This section will walk through the step-by-step process to getting the profile created within the JAGGAER Direct Supplier Portal.

1. You will be emailed an email link for registration, follow this link to do the initial profile set up



2. Do not select “Already Jagger Direct supplier”.
3. Select the Language you would prefer to use for the supplier portal.

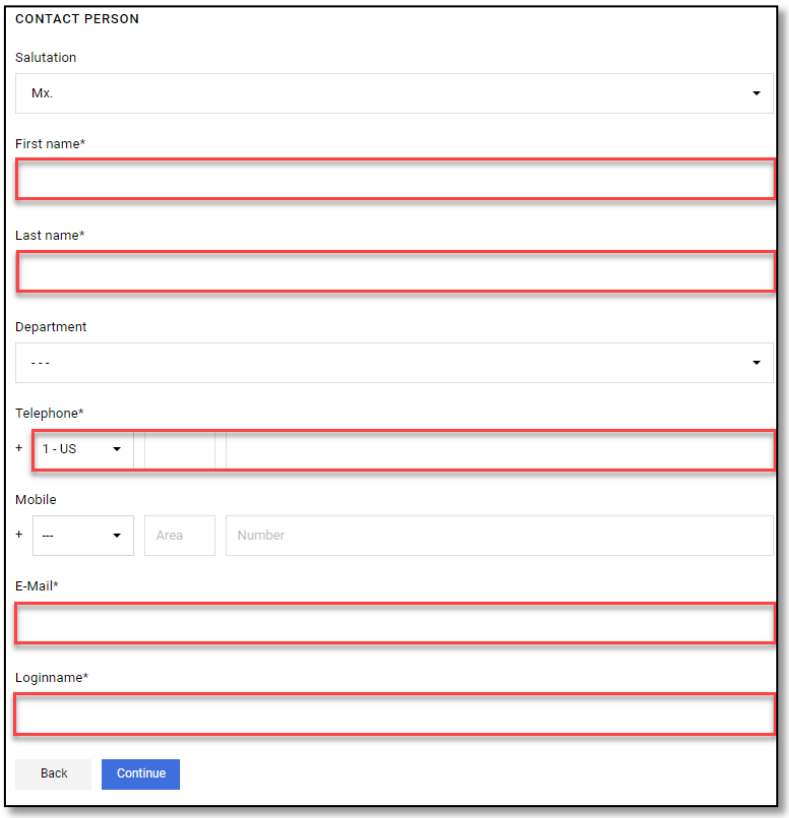


OSHKOSH

SRM Profile Creation

4. Complete and verify your **Contact Information.** Fields marked with an astericks (*****) are mandatory. Oshkosh recommends entering the first part of your email for your login name. (joe.smith@example.com = joe.smith)

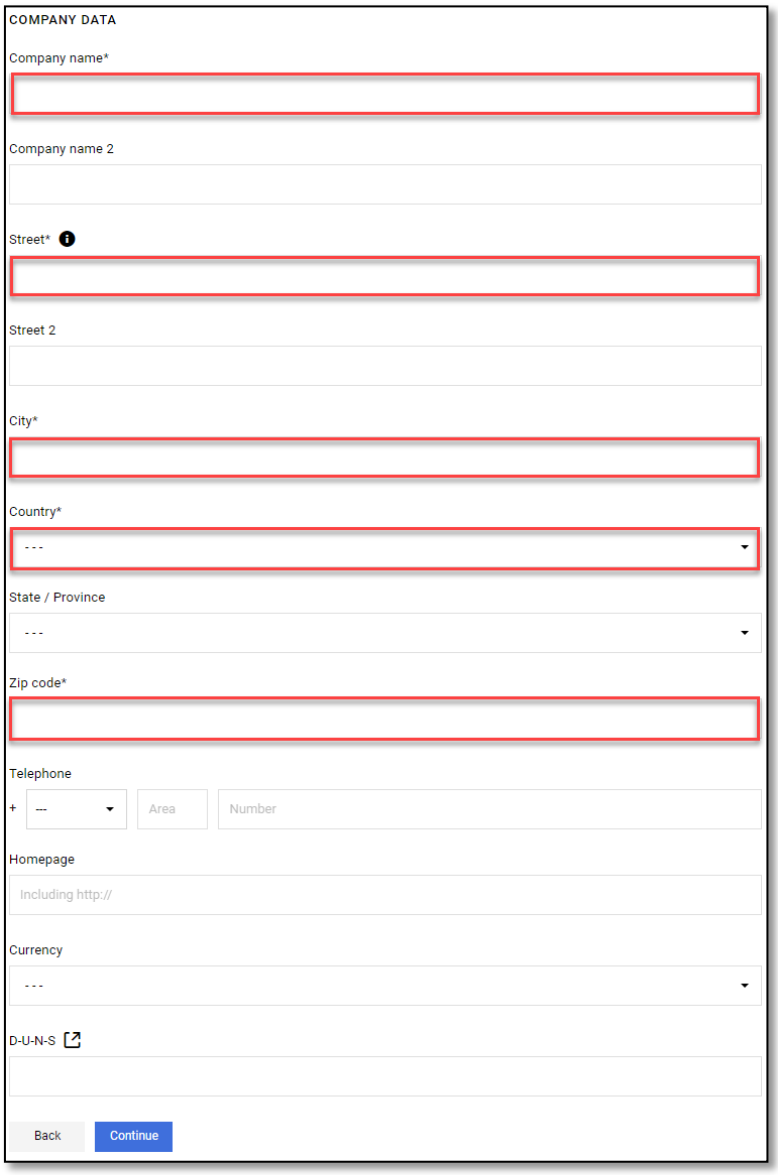
5. Click **Continue**.



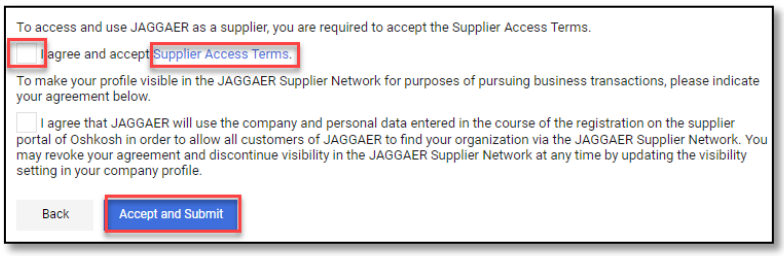
OSHKOSH

SRM Profile Creation

6. Complete the required company data indicated by astericks (*) and then procced by selecting continue

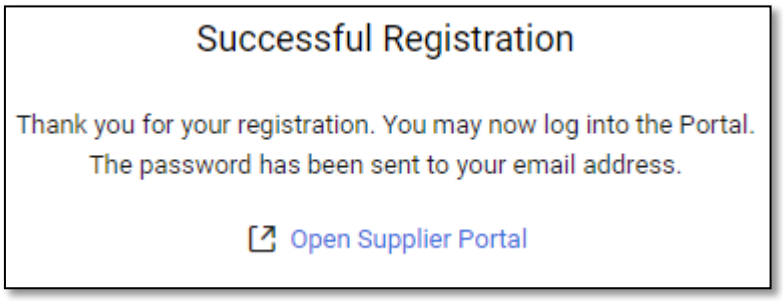
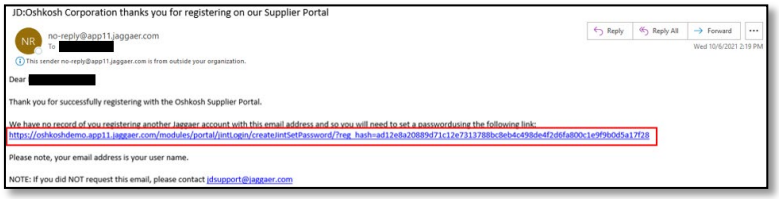
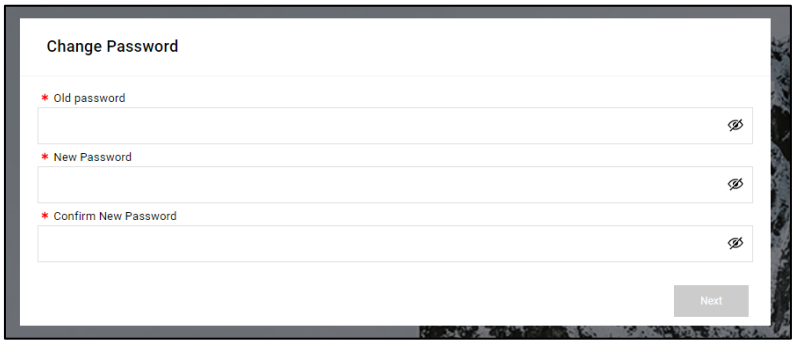


7. Next window is a disclaimer noting Jaggaer's supplier access terms. Only the first box is required to move on.
   - *Note* – These terms state it is your responsibility to handle and manage the data as accurately as possible



OSHKOSH

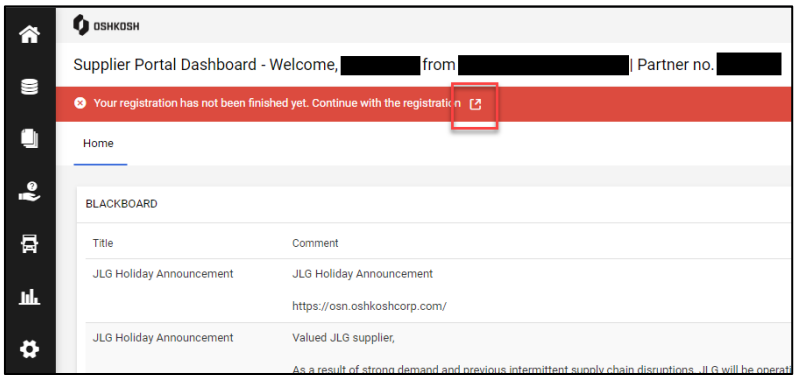
SRM Profile Creation

8. Once you have accepted and submitted you will be greated with this message. • An email will also be sent with a link to the reset password	
9. Check your inbox for an email providing you with your login name and instructions to set a password.	
10. Password should meet the following criteria: • Minimum of 8 characters • Minimum of 1 of the following character: !@#$%^&*()? • Minimum of one number • Minimum of one alphabetic character	
11. Login with your credentials.	

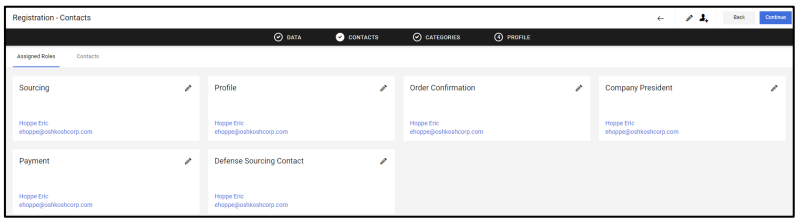
OSHKOSH

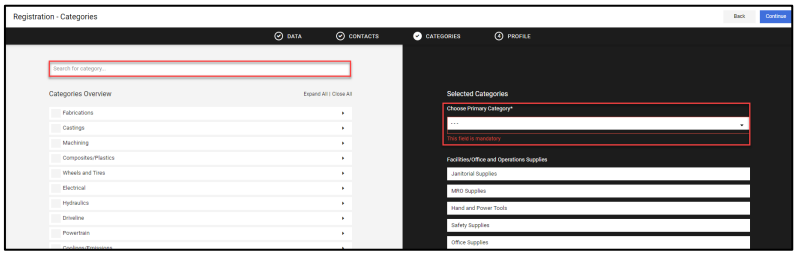
SRM Profile Creation

12. Click the to the right of "Your registration has not been finished yet. Continue with the registration."



13. There will four sections, DATA, CONTACTS, CATEGORIES, and PROFILE
    - DATA should be complete from initial registration but here you can verify it's accuracy
    - CONTACTS – See page 11, you can add and edit additional contacts, otherwise all roles default to user setting up account
    - CATEGORIES – Primary Category is mandatory, select best fitting options
    - PROFILE – See next step



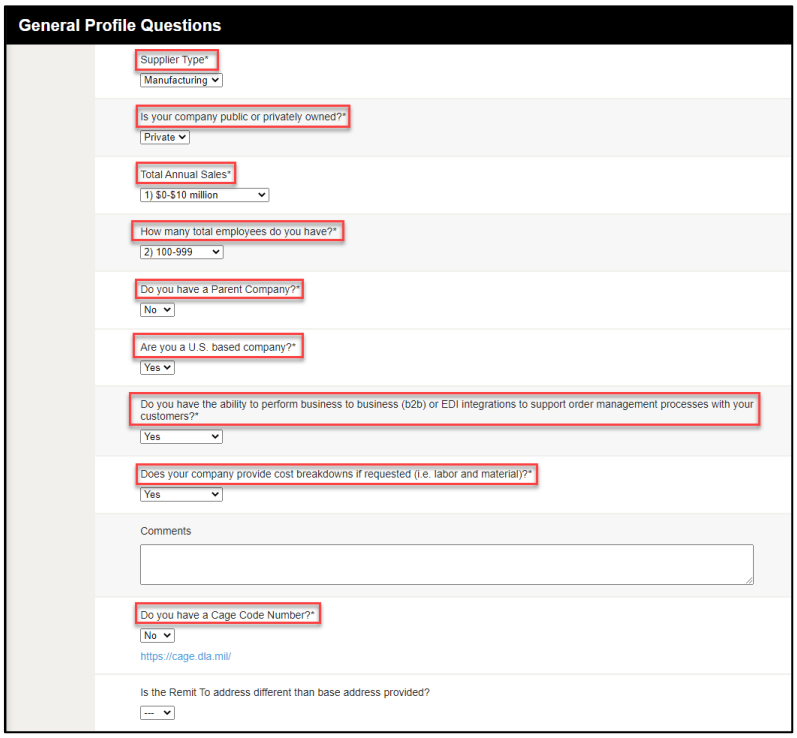


14. First Section is "General." Each section indicated with an astericks is mandatory to answer Yes or No.
    - Oshkosh Supplier Expectations
        i. Supplier Code of Conduct – **Mandatory**
        ii. Supplier Standards Guide – **Mandatory**
        iii. FRDM – **Preferred**, not mandatory

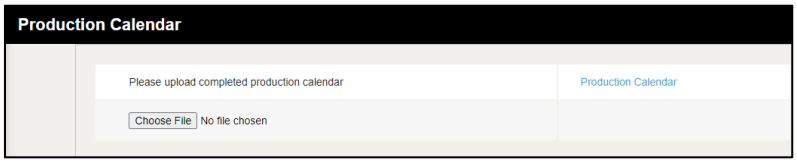
OSHKOSH

SRM Profile Creation

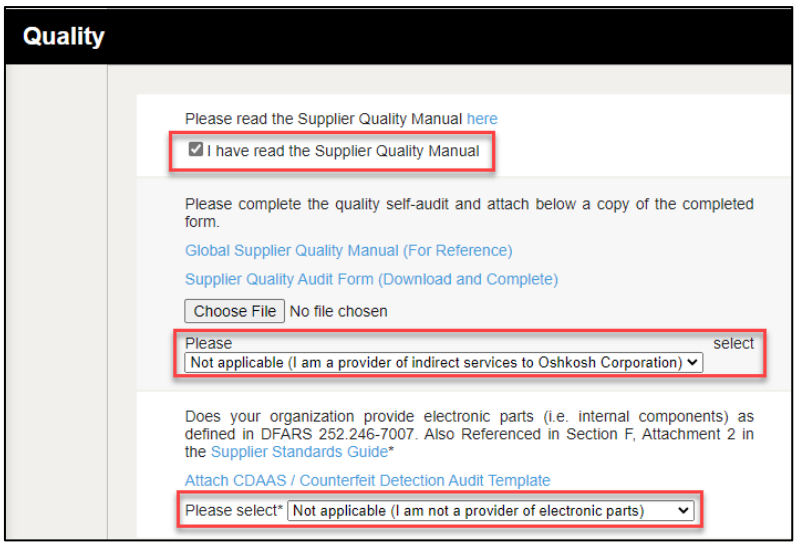
- General Profile Questions
  - i. All sections are mandatory except the comments section and the “Remit To” address question



- Production Calendar
  - i. Preferred but not required

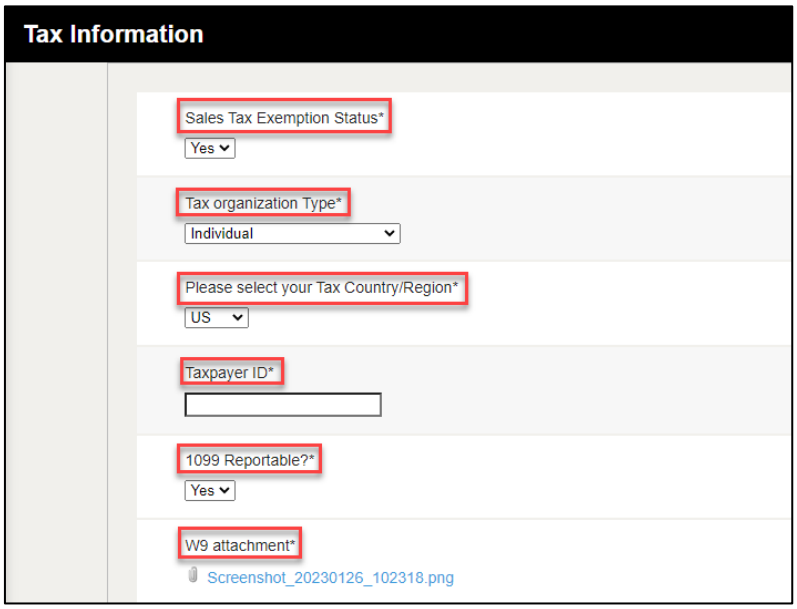
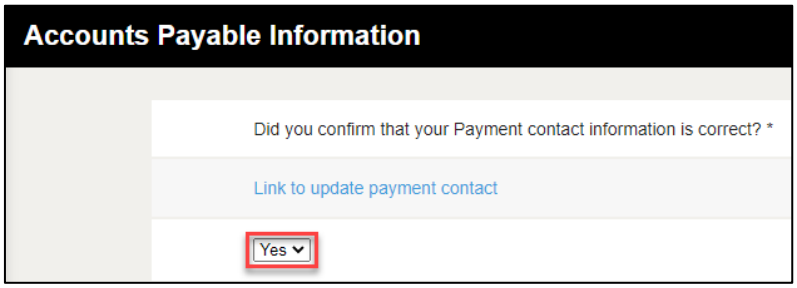
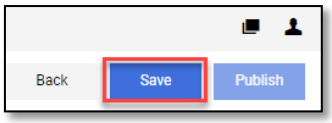
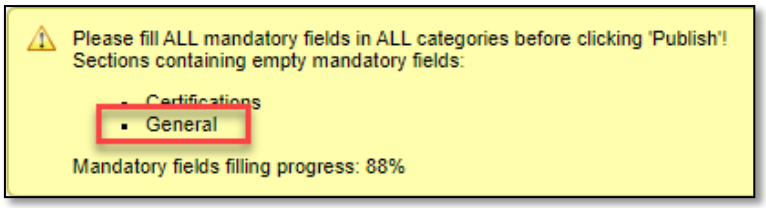


- Quality
  - i. Selecting “I have read the Supplier Quality Manual” is required
  - ii. Supplier Quality Audit is required for suppliers of direct manufactured products; it is not required for indirect products and services
  - iii. CDAAS is only required if you are providing Electronic Components



OSHKOSH

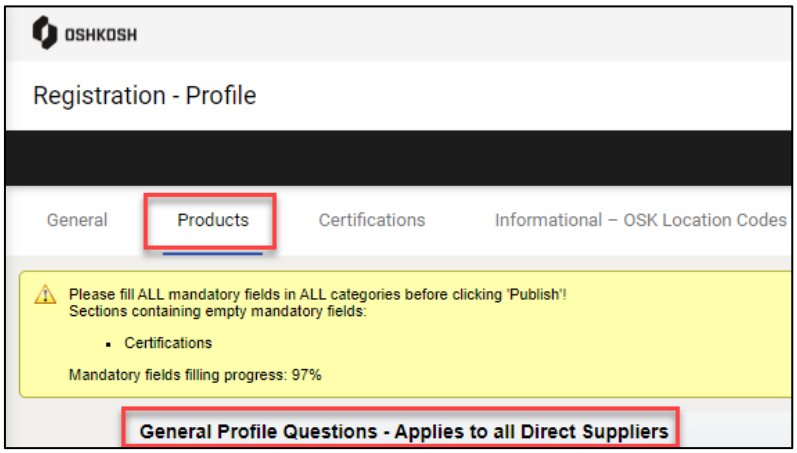
SRM Profile Creation

• Tax Information i. All fields mandatory, you will need to attach a copy of your W9 for the last section	
• Accounts Payable Information i. Mandatory – you will set up contacts in a later step, if there will only be one contact you are the default payment contact	
• Once complete select “Save” from the top-right corner i. If you missed any fields you will be notified via a warning message. If you completed the section incorrectly it will show up in the list.	 

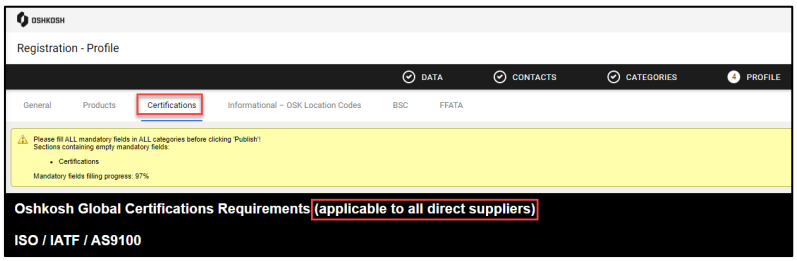
OSHKOSH

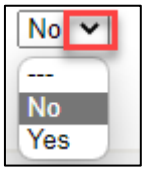
SRM Profile Creation

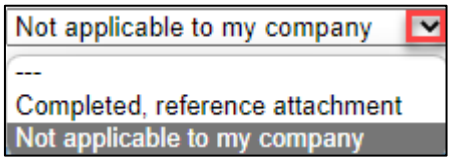
15. Second section is “Products;” this section is geared specifically to direct suppliers, please complete as much of this section as you can. This section goes into further analysis of quality specifications and engineering capabilities.
    - If you are not supplying components/assemblies for our final products you can move on to the next step



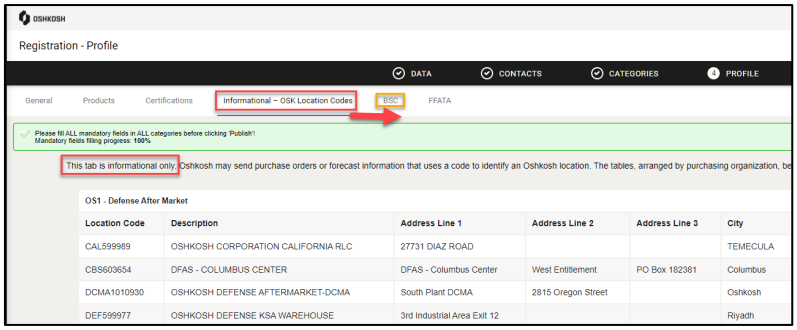
16. Third section is “Certifications;” this section is also geared specifically to direct suppliers but require answers for each question
    - If indirect or a question is not applicable to your company select “No” or “Not Applicatble” from the drop-down option







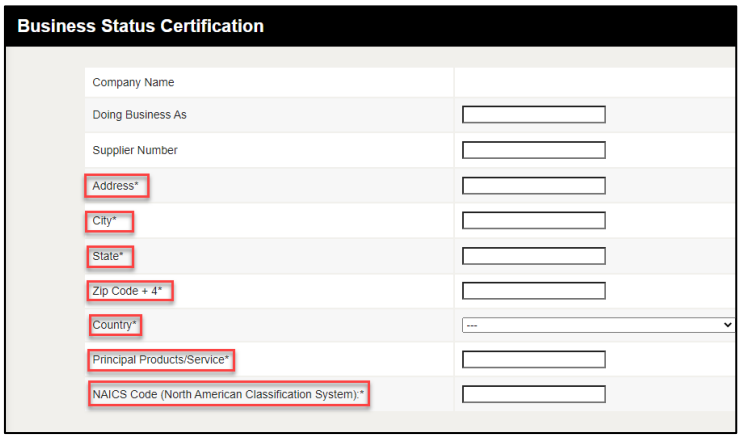
17. Fourth section is only informational, it provides our location codes; these are referenced on Purchase Orders and Forecasts.
    - Select the next section (BSC) to continue on



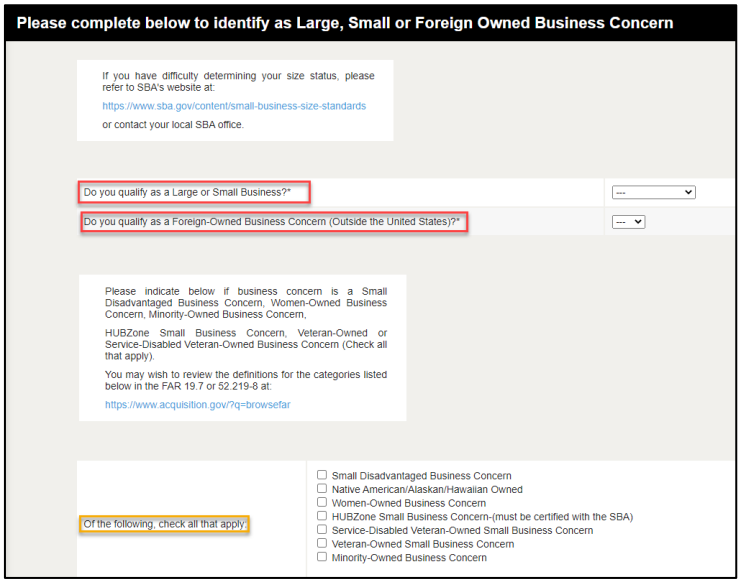
OSHKOSH

SRM Profile Creation

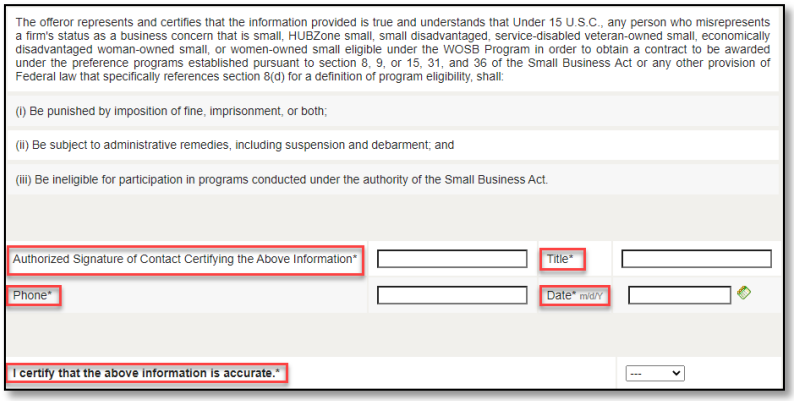
18. Fifth section is the Business Status Certification portion and the following fields are required:
    - Address
    - City
    - State
    - Zip Code (9-digit format, no dash)
    - Country
    - Principal Products/Service
    - NAICS Code (North American Classification System, six-digit code describing principal products/service provided, multiple codes can be provided)



- The second portion on this section is declaration of business size, foreign-owned status, as well as other various concern options that may apply
    i. Only the sections with astericks (*) are required
    ii. Foreign-owned suppliers will need to further indicate if any subcontract performance occurs within the United States
    iii. For the most part, size standards are based on the average annual receipts or the average employment of a supplier
    iv. For more information on these size standards, please visit https://www.sba.gov/federal-contracting/contracting-guide/size-standards



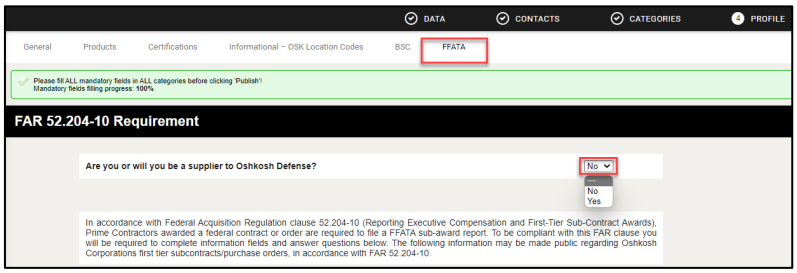
- Final requirement of this section is at the bottom which is to sign and certify accuracy

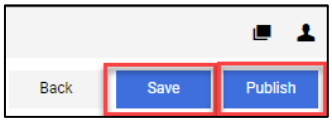


OSHKOSH

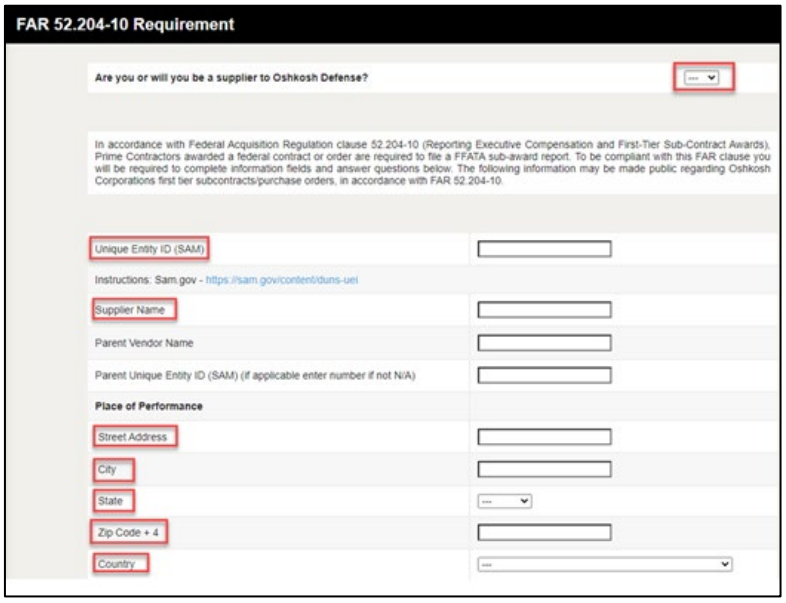
SRM Profile Creation

19. The Sixth and final section is the FFATA (Federal Funding Accountability and Transparency Act) tab.
    - The first question is required for everyone:
        i. If **Yes**; you will need to complete the rest of this section
        ii. If **No**; you are complete and select save from the top-right corner. If all mandatory fields are complete you can also select Publish from the top-right corner.

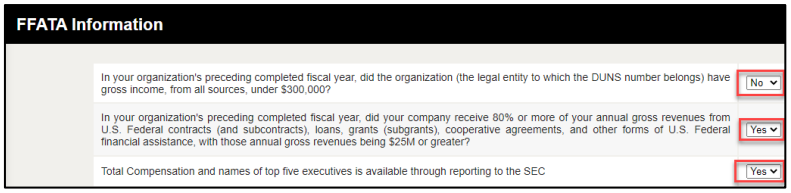


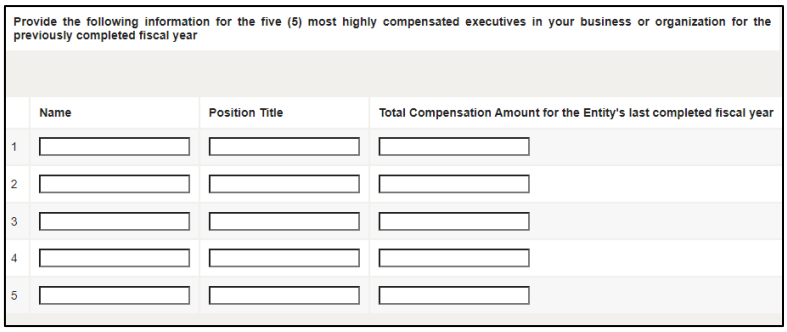


- If you are supplying Oshkosh Defense; Section one will be to meet the FAR 52.204-10 requirement
    i. All sections (excluding Parent Vendor Name & Parent Unique Entity ID) are required
        1. Note: Zip code is 9-digit, no dash, space, or special characters
    ii. There is a link to instructions on obtaining a Unique Entity ID from SAM.gov below that field
        1. Note: UEI is 12 alphanumeric characters



- Second section will be to satisfy the FFATA Information; use the drop down option next to each applicable option to select yes or no.
    i. The final question will require the names, titles, and compensation of the highest compensated executives if not reported through SEC

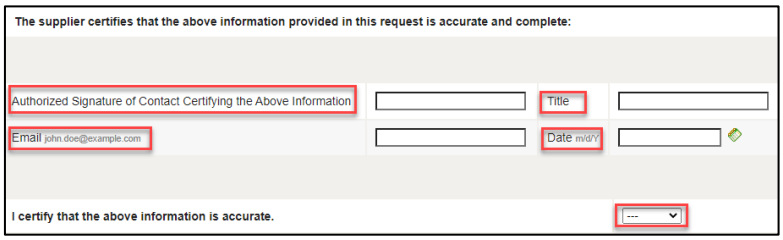


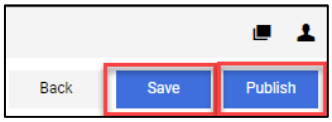


OSHKOSH

SRM Profile Creation

- Final step will be to Sign, Certify, Save, and Publish
  - i. All Fields are required
  - ii. Save & Publish are at the top of the screen





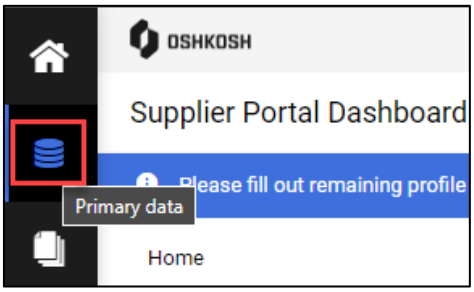
This section is complete; after hitting publish the profile submission will go to an internal gate keeper for review. You will get a notification email once completed and approved.

Adding, Editing, and Removing

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 11-12	Adding, editing, and deleting contacts
Page 13	Assigning/Changing Roles and Responsibilities

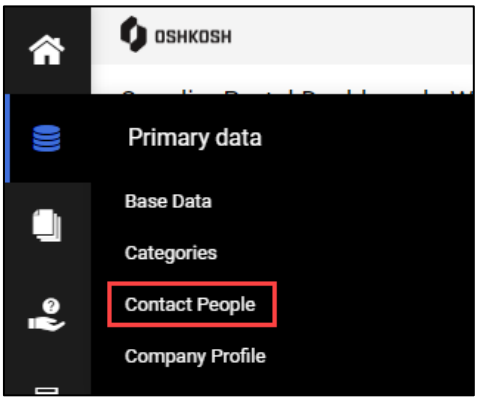
1. Once logged into Jaggaer; select the icon from the left menu to access Primary data



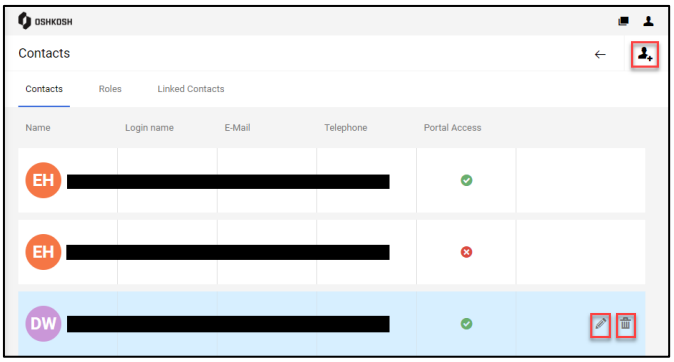
OSHKOSH

SRM Profile Creation

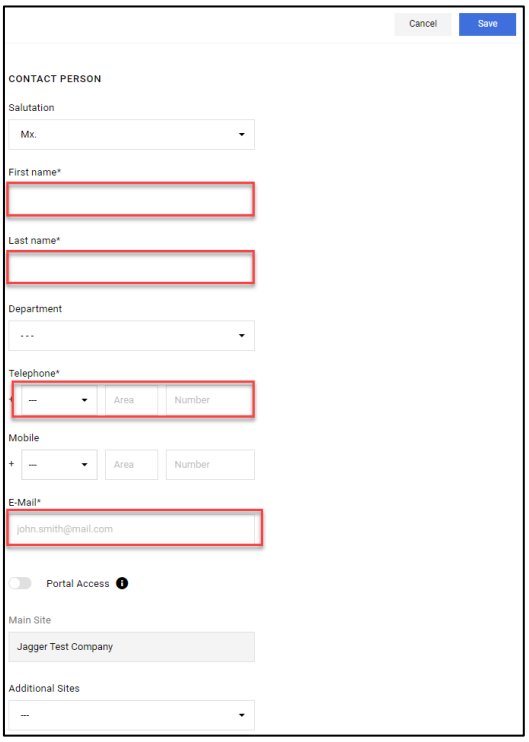
2. When you click on “Primary Data” four options will appear. Select the third option “Contact People”



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



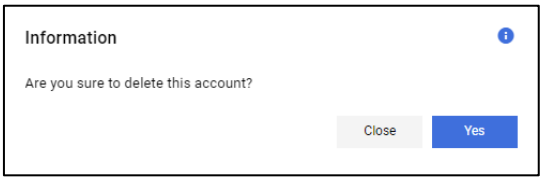
4. If Adding contacts; after selecting “add” with the icon, fill in all of the required fields (marked with *) and click “save”
   a. If you intend for the contact to be able to access Jaggaer for any reason you must toggel the **Portal Access** button, it will appear blue and below a loginname field 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)



OSHKOSH

SRM Profile Creation

5. If deleting a contact, after selecting “delete” with the icon, you will be prompted with a warning message

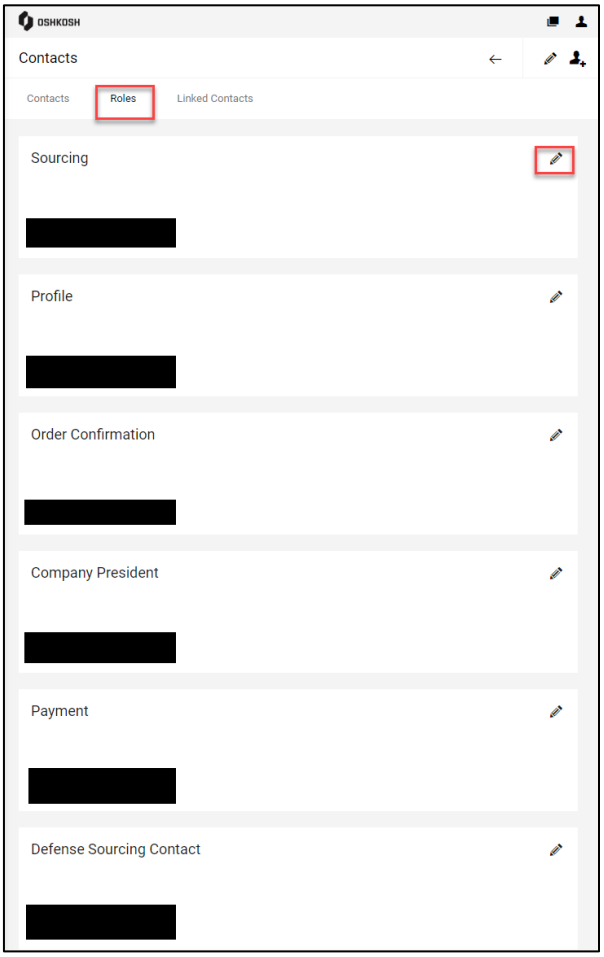


***Note**: Editing a contact in this section is limited to name, email, and phone numbers. Roles is covered in next section.*

Roles and Responsibilities

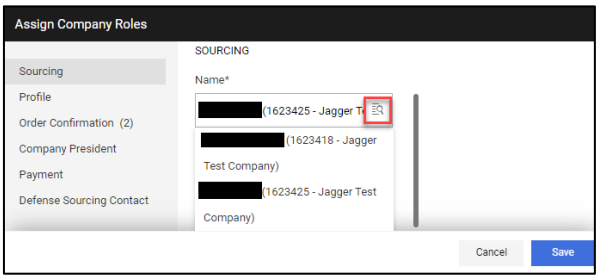
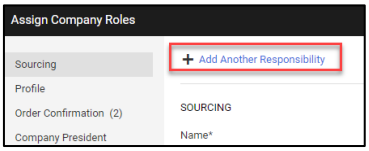
1. After you have all of your contacts added, you can assign roles by selecting the second tab from the top menu, below are description of each option
   - **Sourcing** –Answer and respond to any electronic RFQs regardless of segment *(multiple contacts)*
   - **Profile** – Maintain and adjust supplier 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)

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



OSHKOSH

SRM Profile Creation

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	