

Supplier Onboarding – Domestic Company

Indiana University (IU) is a member of the Jaggaer supplier network. To receive payment from IU, payees, referred to as "suppliers" in Jaggaer, must complete the supplier onboarding process and join the network. Once established, your supplier portal is used to manage payment information, addresses, tax forms, and more.

The Jaggaer portal is not accessible on mobile devices such as smartphones or tablets.

BUY.IU must be accessed from a desktop computer.

This document provides a step-by-step walkthrough of the supplier onboarding process for a US-taxed Company.

Before you follow the steps in this document, locate the following items:

- Indiana University supplier invitation email.
- Direct deposit (ACH) banking information.
- Scanned image or digital copy of completed and signed W-9 tax form.

Already started the process and need to pick up where you left off? <u>Click here</u>.

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Invitation

The onboarding process begins when an IU staff member requests your addition to the supplier network. IU Purchasing reviews the request, and, once approved, invites you to begin the onboarding process via email. This email invitation will come from the email address <u>buyiu.noreply@iu.edu</u>, have a sender name of "Indiana University," and will look like the example below.

Click Register Now to establish your username and password.



You will also receive reminder emails from Jaggaer directly. These messages come from support@sciquest.com and contain contact information for Jaggaer's support team.

Please contact the IU department you are working with for assistance first before contacting Jaggaer.



Create Your Jaggaer Network Account

After clicking Register Now in the email invitation, the registration page opens in a browser window. Click the dropdown in the upper right-hand corner to select a language, if desired, then **Continue with Registration** to proceed.

Ψ IND	IANA UNIVERSITY	
Registration Checklist	Welcome to Supplier Registration	English 🔻
Registration FAQ	Welcome to the Indiana University supplier portal! (TEST)	<u>English</u>
<u>Registration Tutorial</u>	Thank you for doing business with us. Indiana University has made a major investment in redesigning our process for procuring goods and services. Our improvements will touch each step from quote, purchase order, delivery, and payment. Our implementation of JAGGAER, IU's electronic procurement system, will allow IU to easily source and purchase products and services. Our goal is to make it easier to do business with Indiana University. If you already have an account or are a registered supplier that has been invited to do business with Indiana University, please log in with your username and email address.	■ <u>français</u> ■ <u>Deutsch</u> ■ <u>Italiano</u> ■ <u>Espanol</u> ■_中国
	Registered suppliers with active log in information will be able to Maintain valid contact information Review the status of payments Update and review banking information Important Registration Information: Please ensure that your legal name matches the legal name of the entity as listed on the tax form provided to the University. Indiana University's payment terms are NET 30 upon receipt of invoice. We make every effort to pay our suppliers in a timely manner. If you have questions or concerns, contact Indiana University Office of Procurement Services via via our <u>Support Form</u> , or by phone at 812.855.3720.	
	Continue With Registration	



Fields marked with a star \star are required. Add your contact info, confirm your email (which will become your Jaggaer username), review and accept the terms and conditions, and complete the Captcha checkbox. Once completed, select **Create Account**.

	NA UNIVERSITY	
Supplier Regis	tration Registration Tutorial	English 💌
Your Contact Info		
Jean-Luc	Picard	
First Name 🖈	Last Name 🚖	
Title		
855555555	ext.	
Phone Number 🖈		
International phone numbers n	nust begin with +	
Your Login		
jlpgoiu@proton.me		
Email ★		
Lindii A		
jlpgoiu@proton.me		
jlpgoiu@proton.me Confirm Email ★		
jlpgoiu@proton.me Confirm Email ★	f accessibility assistance	
jlpgoiu@proton.me Confirm Email ★	f accessibility assistance	
ilpgoiu@proton.me Confirm Email ★ □ I am a user in need of Terms and Conditions		
jlpgoiu@proton.me Confirm Email ★ I am a user in need of Terms and Conditions	of accessibility assistance pted JAGGAER's <u>Terms and Conditions [7</u>	
jlpgoiu@proton.me Confirm Email ★		
jlpgoiu@proton.me Confirm Email ★ I am a user in need of Terms and Conditions		

Your email address acts as your username when accessing the supplier portal. Store your username and password in a safe place! You will need this information to login to the portal and make changes in the future.



After selecting **Create Account**, you will receive a notification that your account was created and that a link has been sent to the email address provided to set up a password.



Locate the password setup message in your email inbox. Select Change supplier account password.



Create a password which meets the required criteria. Select **Set Password**.

	Set JAGGAER Global Identity English US - Password					
jlpg	goiu@proton.me					
Ne	w Password					
•	•••••	Ø				
	Confirm Password					
Cor	nfirm Password					
Cor	firm Password	Ø				
Cor •		Ø				
Cor • •	•••••	Ø				
Cor • •	Minimum of 12 characters Must be different from email	Ø				
•	Minimum of 12 characters Must be different from email Minimum of 1 special character (not A-Z, a-z, or 0-9)	Ø				
	Minimum of 12 characters Must be different from email Minimum of 1 special character (not A-Z, a-z, or 0-9) Minimum of 1 number	ø				
	Minimum of 12 characters Must be different from email Minimum of 1 special character (not A-Z, a-z, or 0-9) Minimum of 1 number Minimum of 1 lowercase letters	ø				
	Minimum of 12 characters Must be different from email Minimum of 1 special character (not A-Z, a-z, or 0-9) Minimum of 1 number Minimum of 1 lowercase letters	ø				



Once your password is set, you will be prompted to return to the **original registration link** (sent from <u>buyiu.noreply@iu.edu</u>). Click once more on the **Register Now** button and follow the prompts to log in using the username and password you had created.



Finally, select how to receive your one-time login code. We recommend using the **Send to Email Address on Record** option. Click **Login** to continue.



Locate the one-time code email from Jaggaer to access BUY.IU. Upon login you should automatically be transferred to the BUY.IU supplier portal. **Before continuing**, ensure you see Indiana University branding and a "Welcome to Indiana University" supplier portal banner.

• Logged in but do not see IU branding? <u>Click here</u>.

Complete and Submit Registration Information

The supplier registration page is made up a series of sections, visible in the left-hand menu. Each section is followed by an attention symbol \triangle . Once the section is complete the symbol will be replaced with a green checkmark \checkmark .

The Sampson Proj	ect	Welcome to Supplier Registration			
Registration In Progress fo Indiana University TEST ST 2 of 9 Steps Complete		Welcome to the Indiana University Supplier			
Welcome		Thank you for doing business with us. Indiana University has rede University. Our system improvements will touch quotes, purchase	signed our process for procuring goods and services. Our goal is to make it easier to do bus orders, deliveries, and payments.	siness with our	
Company Overview	▲	If you already have an account or are a registered supplier that ha Registered suppliers with active login information will be able to:	s been invited to do business with Indiana University, please log in with your username and ϵ	email address.	
Business Details	A	Upload and maintain valid contact, account, and insurance Receive real-time electronic delivery of purchase orders	documentation		
Addresses Contacts		Submit electronic quotes Quicky and easily submit invoices Review payment status Uoload and udate cataloas			
Diversity	▲	Important Registration Information			
Insurance		Please ensure that your legal name matches the legal name o	the entity listed on the tax forms you provide us.		
Payment Information	▲	Indiana University's payment terms are NET 30 upon receipt o concerns, contact Indiana University Office of Procurement Se	f invoice. We make every effort to pay our suppliers in a timely manner. If you have que rvices via our Support Form, or by phone at 812.855.3720.	estions or	
Tax Information	▲				
Supplier Information	1	Required to Start Registration			
Certify & Submit		Legal Company Name * The Sampson Project			



Throughout the registration process you will see fields marked with a star.

These fields are required and must be satisfied to complete your registration. All other fields are optional.

Welcome

On the Welcome page, enter the company name in the appropriate fields then click **Next**.

The Sampson Proj	ect Welcome	e to Supplier Registration	
Registration In Progress fo Indiana University TEST SIT 2 of 9 Steps Complete	Welcome t	to the Indiana University Supplier Portal	
Welcome		doing business with us. Indiana University has redesigned our process for procuring goods and services. Our goal is to make it easier to system improvements will touch quotes, purchase orders, deliveries, and payments.	do business with our
Company Overview	A	have an account or are a registered supplier that has been invited to do business with Indiana University, please log in with your username ppliers with active login information will be able to:	e and email address.
Business Details Addresses	Receive Submit e	and maintain valid contact, account, and insurance documentation e real-time electronic delivery of purchase orders electronic quotes rand easily submit invoices	
Contacts		payment status and update catalogs	
Diversity		gistration Information e that your legal name matches the legal name of the entity listed on the tax forms you provide us.	
Payment Information	Indiana Univer	ersity's payment terms are NET 30 upon receipt of invoice. We make every effort to pay our suppliers in a timely manner. If you ha tatcl Indiana University Office of Procurement Services via our Support Form, or by phone at 812.855.3720.	ive questions or
Tax Information	A		
Supplier Information	 Required to 	o Start Registration	
Certify & Submit	Legal Compan	any Name * The Sampson Project	

You are not required to complete the supplier onboarding process in one sitting. At any time, click **Save Progress** to save your work and return later.



Company Overview

Select your legal structure from the Legal Structure drop-down menu. Enter your Employee Identification Number (EIN) in the Tax ID Number field.

Define your company's Legal Structure Sub-Classification or select 'Not Applicable.'

Click **Save Changes** to save your work and **Next** to complete the Individual Overview section. The left-hand menu updates to reflect a green checkmark once the section is complete.

rofile						
	Company Overview	(3
			eral information ab	out your company to e	nsure we have the most up-to-date info	ormation in our system.
_						
-	Please provide all of your D	DBAs. If you have multiple DBAs,	please separate th	em with semicolons.		
A A	Doing Business As (DBA)					
	Country of Origin should	I be the country you use for tax	purposes. (US Citi	izens and Permanent R	esidents should select "United States")
~	Country of Origin *	United States		~		
▲ ▲	Does your business have a DUNS number? *	🔾 Yes 💿 No				
~	Legal Structure *	C Corporation	~			
	If you are registering as an	individual please provide your s	ocial security num	ber here <mark>or equivalent</mark> i	f you reside outside of the United State	95.
	Tax ID Number	351002365				
	Website			0		
	Additional Questions					
	Legal Structure Sub-Classifie	cation *				
	Not Applicable	~				
	* Required to Complete Re	gistration			< Previous	Next > Save Changes
		Company Overview Watch this video for help: lin The information entered on Please provide all of your I Doing Business As (DBA) Country of Origin should Country of Origin should Country of Origin * Does your business have a DUNS number? * Legal Structure * If you are registering as an Tax ID Number Website Additional Questions Legal Structure Sub-Classifi Not Applicable	 Company Overview Watch this video for help: link here The information entered on this page allows us to track gene Please provide all of your DBAs. If you have multiple DBAs. Doing Business As (DBA) O Country of Origin should be the country you use for tax Country of Origin * O United States Does your business Yes No have a DUNS number? * O Legal Structure * O Corporation If you are registering as an individual please provide your s Tax ID Number 351002365 Website Legal Structure Sub-Classification * 	Company Overview Watch this video for help: link here The information entered on this page allows us to track general information ab Please provide all of your DBAs. If you have multiple DBAs, please separate th Doing Business As (DBA) Country of Origin should be the country you use for tax purposes. (US Cit Country of Origin * United States Does your business Nave a DUNS Number? Legal Structure * C C Corporation Tax ID Number 351002365 Website Additional Questions Legal Structure Sub-Classification * Not Applicable	 Company Overview Watch this video for help: link here The Information entered on this page allows us to track general information about your company to entered on this page allows us to track general information about your company to entered on this page allows us to track general information about your company to entered on this page allows us to track general information about your company to entered on this page allows us to track general information about your company to entered on this page allows us to track general information about your company to entered on this page allows us to track general information about your company to entered all of your DBAs. If you have multiple DBAs, please separate them with semicolons. Doing Business As (DBA) Country of Origin * United States Country of Origin * United States Does your business have a DUNS have a DUNS in umber? * O Legal Structure * O C Corporation If you are registering as an individual please provide your social security number here or equivalent in Tax ID Number Stol02365 Website Not Applicable Not Applicable 	Company Overview Watch this video for help: link here The information entered on this page allows us to track general information about your company to ensure we have the most up-to-date info Please provide all of your DBAs. If you have multiple DBAs, please separate them with semicolons. Doing Business As (DBA) Country of Origin should be the country you use for fax purposes. (US Citizens and Permanent Residents should select 'United States' Country of Origin * United States Country of Origin * United States Country of Origin * United States Country of Origin * Corporation Country of Origin * Corporation Country of Origin * Corporation Country of Origin as an individual please provide your social security number here or equivalent if you reside outside of the United State Country are registering as an individual please provide your social security number here or equivalent if you reside outside of the United State Country of Origin * Corporation Country of Origin * Corporation Country of Distributer Country of Distributer Country of Distributer Country of Corporation Country of Corporation Country of Corporation Country of Distributer Country of Distributer Country of Distributer Country of Corporation Country of Distributer Country of D



Business Details

This area is comprised of optional information about the company. The only required information is **Commodity Codes.** If this area is pre-completed, click **Next**.

The Sampson Projec	τ	Business Details								1
Registration In Progress for: Indiana University TEST SITE 3 of 9 Steps Complete		The information on this page allo provide. Additionally, this data is Administration. The SBA standar	used to determi	ne whether or not y	our business mee	ts the sma	all business size	standards as defin		
Welcome Company Overview	-	Year Established	עע							
Business Details	A	Number of Employees								
Addresses Contacts	A	Business Description								
Diversity		25	00 characters rem	aining						
Insurance	1	Annual Revenue/Receipts	<u>.</u>							
Payment Information Tax Information	A	2021 Annual Revenue/Receipts			USI)	•			
Supplier Information	-	2020 Annual			USI)				
Certify & Submit		Revenue/Receipts 2019 Annual Revenue/Receipts			USI)	•			
Registration FAQ View History		Sales Territories								
		Is Your Business a Local Supplier	r?	🔿 Yes 🛛 🤇	No					
		Is Your Business a National Supp	plier?	🔿 Yes (No					
		U.S. Service Area		a 1			Edit			
		International Service Area		-			Edit			
		Products and Services								
		NAICS Codes		No Primary N	IAICS Code Selec	ed	Edit			
		Commodity Codes *		-			Edit			
		Keywords								
		★ Required to Complete Registr	ration			2		< Previous	Next >	Save Changes

Click **Edit**. A new window will open with a search box.

Commodity Co	odes	э
Use Search or browse the list to	o select applicable Commodity Codes. You can select multiple before clicking Done.	
Search 0 Selected Codes		
Showing 1 - 20 of 192 results		
Results Per Page 20 v Commodity Code	Sort by: Commodity Code v Description	2

You can search keywords to locate the company commodity area. You can also manually search through the provided list.

Helpful Search Tip: Use simple keywords such as 'food,' 'equipment,' or 'books'.



research Search O Selected Code:	st to select applicable Commodity Codes. You can select multiple before olicking Dor	ne.
Showing 1 - 5 of 5 results Results Per Page 20 v	Sort by: Commodity Code 🗸	f 1 📐 7
Commodity Code	Description	
IT7	Computer (Hardware) - Enterprise & Research & Services	
PR022	Marketing Services, Surveys, Market Research, Student Recruitment	
PRO44	Research agreements, collaboration agreements, and internally funded research agreements	
SCI2	Chemicals, Gases & Elements - Research & Laboratory	
SCI24	Research agreements, collaboration agreements,	

Click the commodity code(s) that best describes your business area.

Commodity Co	odes ×
Use Search or browse the list t	o select applicable Commodity Codes. You can select multiple before clicking Done.
research	
Search	
1 Selected Codes	
Showing 1 - 5 of 5 results	
Results Per Page 20 V	Sort by: Commodity Code Page 1 of 1 ? Description
ІТ7	Computer (Hardware) - Enterprise & Research &
PR022	Services Marketing Services, Surveys, Market Research, Student Recruitment
PR044	Research agreements, collaboration agreements, and internally funded research agreements
SCI2	Chemicals, Gases & Elements - Research & Laboratory
SCI24	Research agreements, collaboration agreements, and internally funded research agreements
	Done Close

Click **Done** to Continue.



Products and Services	
NAICS Codes \varTheta	No Primary NAICS Code Selected Edit
Commodity Codes *	Edit PRO22 (Marketing Services, Surveys, Market Research, Student Recruitment)
Keywords	700 characters remaining
★ Required to Complete Registration	Previous Next > Save Changes

Your selection will populate.

Click **Next** to continue.

Addresses

BUY.IU requires three types of addresses: Fulfillment, Physical, and Remittance.

The Sampson Project		Addresses		?
Registration In Progress for: Indiana University TEST SITE 4 of 9 Steps Complete		Please enter any addresses from which your organization does business t Fulfillment - Where IU will send POs	o help us route information and communication correctly.	
Welcome Company Overview		Physical - a physical address, perhaps headquarters, or your Tax Address Remittance - An address associated with where IU will send payment, per	haps the accounts receivable location	
Business Details	~			
Addresses		Required Information		
Contacts	▲	The following address types are required to complete registration: - Fulfilment		
Diversity	▲	- Physical - Remittance		
Insurance	-	- Remittance		
Payment Information	▲	No addresses have been entered		
Tax Information	▲	Add Address	Hide Inactive Addres	ses
Supplier Information	~			
Certify & Submit				
Registration FAQ View History			C Previous Next >	



A new window will appear.

Add Address	×
Basic Information (Step 1 of 3)	?
What would you like to label this address? *	
Example: Headquarters, Houston Office	
Which of the following business activities take place at this address? (select all that apply) *	
 Takes Orders (fulfillment) Receives Payment (remittance) Other (physical) 	
* Required to Complete Registration	Next >

Add a title for this address. Check the corresponding boxes for this address.

Click Next

Reminder: fields marked with a star are required. All other fields are optional.

Define how purchase orders should be distributed: email or fax.

Add Address		
Address Details (Step 2	? of 3)	'
How would you like to receive purchase orders for this fulfillment address? *	Email V	
	Email	
Email Address *	Fax +fd@iu.edu	



Complete the rest of the required information. Click Next

Add Address		×					
Address Details (Step 2 of 3)							
How would you like to receive purchase orders for this fulfillment address? *	Email v						
Email Address *	johnsoag+fd@iu.edu						
Confirm Email *	johnsoag+fd@iu.edu						
Country *	United States	~					
Address Line 1 *	123 Main street						
Address Line 2							
Address Line 3							
City/Town *	Bloomington						
State/Province *	Indiana 🗸						
Postal Code *	47403						
Phone *	8128556101 ext.						
	International phone numbers must begin with +						
Toll Free Phone	ext. International phone numbers must begin with +						
Fax							
	International phone numbers must begin with +						
* Required to Complete Registrat	ion C Previous Net	d >					

Enter a company contact. If you click **Not Applicable**, you will be required to enter a contact on the next screen.

Primary Contact For T	his Address (Step 3 of 3)	?
You can also update and a	dd Contacts later from the Contacts pag	9.
Enter New Contact) Not Applicable	
Select additional contact type(s) to apply	Takes Orders (fulfillment) Receives Payment (remittance) Other (physical) Catalog Corporate Customer Care Sales Technical PO Failure	
Contact Label *	Administrative	
First Name *	Jerry	
Last Name *	Taylor	
Position Title		
Email *	johnsoag+sp@iu.edu	
Phone *	8128556101 ext. International phone numbers must begin w	rith +
Toll Free Phone	ext.	rith +
Fax	International phone numbers must begin w	rith +

Click Save Changes

The Address and Contact sections are now complete.

The Sampson Proje	ect	Addresses			
tegistration In Progress for: <i>ndiana University TEST SITE</i> 5 of 9 Steps Complete	I	Please enter any addresse		to help us route information and communication correctly.	
Welcome			ss, perhaps headquarters, or your Tax Address		
Company Overview	-	Remittance - An address a	ssociated with where IU will send payment, pe	haps the accounts receivable location	
Business Details	-				
Addresses	~	Address Label	Address Types	Address	
Contacts	1	Business	Remittance (Primary)	123 Main street	Edit 💌
Diversity	A		Fulfillment (Primary) Physical (Primary)	Bloomington, Indiana, 47403 United States	
nsurance	-	Add Address			Show Inactive Address
Payment Information	A	Add Address			
Tax Information	▲				
Supplier Information	~				
Certify & Submit					

Click Next

JAGGA

Contacts

Contacts receive notifications related to orders established with IU. You are required to have one remittance contact on file to satisfy this section of the registration process.

If you added a contact when adding another address this section will already be complete.

Click Add Contact

Kirk, James		Contacts			
Registration In Progress for: <i>ndiana University</i> 3 of 5 Steps Complete		Contact Label	Name	Email	
Welcome		Add Contact			
Individual Overview	×	Add contact			
Addresses	1				
Contacts	~				
Payment Information	~				
Tax Information	1				
Certify & Submit					
gistration FAQ View History					

Enter contact information relevant to the company.

Reminder: fields marked with a star are required. All other fields are optional.



Click Save Changes to save the contact to your profile.

nta	cts		
ontac	Edit Contact		×
elf	Contact Label *	Self	
Add C	First Name *	James	- 1
	Last Name *	Kirk	- 1
	Position Title		- 1
	Email *	cptkirk@gmail.com	- 1
	Phone *	+1 812-856-4574 ext.	
	Toll Free Phone	International phone numbers must begin with + ext.	
		International phone numbers must begin with +	
	Fax	ext. International phone numbers must begin with +	
	Primary	● Yes ○ No	
	* Required to Complete Registra	Save Changes	Close

Repeat these steps as many times as desired to add additional contacts to your profile. Click **Next** to continue to the Payment Information section.

The Sampson Project	t	Contacts				?
Registration In Progress for: Indiana University TEST SITE 6 of 9 Steps Complete		Please enter contact info always contacting the co	ormation for any individuals at your organiz orrect individual. Contacts can be linked to	zation who may provide valuable one existing address. Any requir	information or help to our company. Thi ed contact types are listed below.	s will help us ensure we are
Welcome		Contact Label	Contact Types	Name	Email	
Company Overview Business Details	11	Administrative	Fulfillment (Primary) Remittance (Primary) Other (Primary)	Taylor, Jerry	johnsoag+sp@iu.edu	Edit 💌
Addresses	1	Add Contact 👻				Show Inactive Contacts
Contacts	1					
Diversity	▲					
Insurance	-					
Payment Information	▲					
Tax Information	▲					
Supplier Information						
Certify & Submit						
Registration FAQ View History						Previous

Click Next



Diversity

Click Add Diversity Classification, even if you are not certified as a diverse supplier.

The Sampson Projec	Diversity		
Registration In Progress for: Indiana University TEST SITE 6 of 9 Steps Complete		do business with diverse companies. By entering applicable diversity classifications, you will help us meet certain spending goals for our organization.	
Welcome <u>Company Overview</u> Business Details	/certificatio	is required. For additional explanation of all the diversity classifications listed below please visit our website at https://www.indiana.edu/~busdiv n.shtml. Do not combine critical data documents such as SSN or Bank Information with an uploaded Diversity Certificate. fiana University's page on how to properly redact information from documents before uploading - https://kb.iu.edu/d/adgl.	
Addresses Contacts	Please cl	I Information ick on the "Add Diversity Classifications" button to declare any Diversity Classifications that are applicable to you or to state that you do not qualify.	
Diversity Insurance Payment Information	*	tton below to choose the diversity classifications that apply to your business.	
Tax Information	Additiona	al Questions	
Supplier Information	✓ Do you have	a designation that is not listed above?	
Certify & Submit	O Yes No		
egistration FAQ View History	Do you have Ves No	a certifying agency not mentioned above?	
			nges.

A new window will appear. Select the diversity classification as it relates to the company or "Does not Qualify . . ."

Selecting a classification will require you to upload supporting documents.

Small Business Status	and Diversity Classifications $\space{1.5}^{\times}$
No Classification Does Not Qualify as a Small Business or Dive Federal Diversity Classifications	arse Supplier (DoesNotQualify)
Federal Diversity Classifications MuBZone Small Business HUBZone Small Business (HUBZ) Small Disadvantaged Business (SDB) Disadvantaged Business Enterprise (DBE) Service Disabled Veteran (SDVB) Woman Business Enterprise (WBE)	B(a) Business Development Program (8a) Service-Disabled Veteran-Owned Small Business (SDVOSB) Veteran-Owned Small Business (VOSB) Disabled Veteran Owned Business (DVBE) Minority Business Enterprise (MBE) Veteran Owned Business (VBE)
State Diversity Classifications State of Indiana Minority Business Enterprise State of Indiana Veteran Owned Business (IN	
	Done Close

Upload any requested documents.

Click Done

Click Next



Insurance

Certain services may require liability insurance. Check with your customer if you are unsure.

If insurance is needed, click Add Insurance and upload supporting documents.

INSURANCE CARRIERS	
All insurance carriers selected by supplier must be rated "A-" or above in the most recent edition of the "A.M. Best's Key Rating Guide."	
Important: Do not combine critical data documents such as SSN or Bank Information with an uploaded Insurance Certificate.	
Refer to Indiana University's page on how to properly redact information from documents before uploading - https://kb.iu.edu/d/adgl	
No Insurance has been entered.	
Add Insurance 🔺	
< Previous No.	ext >

If insurance is not required, click Next.

Payment Information

US-taxed companies may elect to receive payment via direct deposit, also known as ACH, or paper check. In either case, click **Add Payment Information** and select your preferred method of payment. Paper checks will be mailed to the remit address entered earlier in the registration process. **Wire Transfer payments are reserved for payments outside the US**.

The Sampson Project		Payment Information	?
Registration In Progress for: Indiana University TEST SITE 7 of 9 Steps Complete		IMPORTANT: Currency on all invoices must match the currency stated on Indiana University issued purchase orders.	
Welcome		Information on this page is used to determine how and where you will receive payment. Please enter an email address if you wish to receive an email notification regarding payments including invoice, date, and amount.	
Company Overview Business Details Addresses Contacts Diversity Insurance Payment Information Tax Information	* * * * * * * * * * * * * * * * * * *	The order of prioritization of payment methods is: US Bank Payment Plus – Single Use Credit Card Sing up at US Bank is required to properly receive payment. Option will not be activated until setup is complete. Contact iu@supplier-services.com. Uicet Deposit (ACH) UI vert Deposit (ACH) Uit U sends ACH payments only in CCD format in USD. Uit U sends ACH payments to US-based bank accounts. Uire Transfer Simoury of the transfer with longing transactions only. US based suppliers will be asked to submit direct deposit details if only wire transfer information is provided. Method is approved before wire transfer will be sent. Payment must be made to a bank account in the same name as the supplier. Check Payment is made to the remittance address on file. Please keep this information up to date. If no payment method is selected the default payment method is a check to the remittance address on file. If you have a Sub-Award Contract with Indiana University requiring payment in US Dollars, set USD (United States Dollar) as the preferred currency for payments. Please note that Indiana University's preference for payment terms is NET 30 upon receipt of invoice because this is the shortest period in which we can consistently	
Supplier Information Certify & Submit Registration FAQ View History	•	ensure payment. The University makes every effort to uphold our commitment to pay our vendors in a timely manner. If you have questions or concerns, contact Indiana University Office of Procurement Services via our Support Form, or by phone at 812 855.3720.	
		At least one payment type is required to complete this section. No navment information has been entered. Add Payment Information (Previous New	t)

You may enter multiple payment methods but may only have **one active** payment method.



Payment via Direct Deposit (ACH)

Select **Direct Deposit (ACH)** from the drop-down menu. A new window opens where you can enter your banking information.

Required Information At least one payment type is required to complete this section.					
No payment information has been entered.					
Direct Deposit (ACH) Check					
Wire Transfer					

Reminder: fields marked with a star are required. All other fields are optional.

Electronic Remittance Email field (Required): Enter an email address in this field to receive a notification when a payment is made using this banking information.

Add Payment Information				
Only associated countries	s are displayed.	Î		
Payment Title *	ACH			
Country *	United States 🗸			
Payment Type *	Direct Deposit (ACH)	- 1		
Direct Deposit Format	ACH V			
Remittance Address	Business (Remittance) 🗸	_ [
Electronic Remittance Email *	AR@SP.com			
Currency *	USD V			



Next, enter your bank account information in the **Bank Account** section. Click the **What is this?** link for help locating your routing and account numbers.

Routing and account numbers are not the same as debit or credit card numbers.

Bank Account		
Country *	United States	~
Bank Name *	Indiana Credit Union	
Account Holder's Name *	The Sampson Project	
Account Type *	Checking 🗸	
Routing/Transit Number *	xxxxxxxx	
	What is this?	
Account Number *	*****	
Confirm Account Number \star	xxxxxxxxxxx	

Click Save Changes.

Payment via Check

Select Check from the drop-down menu. A new window opens to collect additional payment details.

Required Information At least one payment type	is required to complete this section.
No payment information has	
Direct Deposit (ACH) Check Wire Transfer	

Reminder: fields marked with a star are required. All other fields are optional.

If you wish to receive an email notification when payment is issued via this method, enter your email address in the **Electronic Remittance Email** field. Click **Save Changes** to save your work.

	Add Payment	Information	× "
	Only associated countries a	re displayed.	d
	Payment Title *	Paper Check	t
	Country *	United States 🔻	
	Payment Type *	Check	p
no r	Electronic Remittance Email	cptkirk@gmail.com	h d
eas	Currency *	USD	ir 20
ann	Active	Yes O No	Se
rect S.	* Required to Complete Registrat	ion Save Changes Close	e



Once payment information is entered, click Next.

The Sampson Project	P	ayment Informatio	on			?	
Registration In Progress for: Indiana University TEST SITE 8 of 9 Steps Complete		MPORTANT: Currency on a	all invoices must match the currency st	ated on Indiana University issued pu	rchase orders.		
Welcome			used to determine how and where you wi g invoice, date, and amount.	l receive payment. Please enter an ema	ail address if you wish to receive an er	nail notification	
Company Overview	✓ ^T	he order of prioritization of p	payment methods is:				
Business Details		 US Bank Payment Plus – Single Use Credit Card Sign up at US Bank is required to properly receive payment. Option will not be activated until setup is complete. Contact iu@supplier-services.com. Direct Deposit (ACH) 					
Addresses	× .	 IU only sends. 	payments only in CCD format in USD. ACH payments to US-based bank acco	unts.			
Contacts	1		e Transfer • Limited to foreign transactions only. US based suppliers will be asked to submit direct deposit details if only wire transfer information is provided.				
Diversity 🗸		 Method is approved before wire transfer will be sent. Payment must be made to a bank account in the same name as the supplier. 					
Insurance	1	Check Payment is ma	ade to the remittance address on file. Pl	ease keep this information up to date.			
Payment Information	🖌 If	no payment method is sele	ected the default payment method is a c	heck to the remittance address on file.			
Tax Information	A If	you have a Sub-Award Cor	ntract with Indiana University requiring pa	yment in US Dollars, set USD (United	States Dollar) as the preferred currenc	y for payments.	
Supplier Information	🖌 е	nsure payment. The Univers	iversity's preference for payment terms is sity makes every effort to uphold our cor	nmitment to pay our vendors in a timely			
Certify & Submit	L	niversity Office of Procuren	nent Services via our <u>Support Form</u> , or	by phone at 812.855.3720.			
Registration FAQ View History		litle ▽	Payment Type	Currency	Active		
	A	ACH	Direct Deposit (ACH)	USD	Yes	Edit	
		Add Payment Information 👻					
					< Pre	evious Next >	

Tax Information

A completed and signed W-9 tax form is required to complete registration. Click Add Tax Document and select W-9.

	Kirk, James	Tax Information ?
_ ld.	Registration In Progress for: <i>Indiana University</i> 4 of 5 Steps Complete	Tax Information is used for payment. Please download prefilled form, review for accuracy, sign and upload.
۵	Welcome Individual Overview	Required Information At least one tax document is required to complete this section.
	Addresses	No tax information has been entered
	Contacts	Add Tax Document 👻
	Payment Information	w-9
	Tax Information	Additional Questions

Enter a name for the tax form in the **Tax Document Name** field and select the year the form was signed from the **Tax Document Year** drop-down menu.

If you already have a completed tax document on hand, click Select file to upload the document.

Add Tax Doc	ument
Tax Type *	W-9
Tax Document Name *	Sampson Project
Tax Document Year	2021 🗸
Tax Documentation *	Select file <i>L</i> rop file to attach, or browse.
Tax Documentation *	Select file <i>D</i> rop file to attach, or browse.

If you do not have a completed W-9 form saved to your computer, click **Download Pre-populated Tax Document**. Jaggaer generates a W-9 tax form which contains information previously entered during the registration process.

is	Add Tax Docu	ıment	×
l	Тах Туре 🕇	W-9	
	Tax Document Name *	Sampson Project	
	Tax Document Year	2021 🗸	
l	Tax Documentation *	Select file Drop file to attach, or browse.	
		Lownload Pre-populated Tax Document	
l	* Required to Complete Registra	ation Save Changes Clo	ose

Print the tax form, sign and date, and scan the document. The signed document can then be uploaded by clicking **Select file**. Alternatively, you may sign the document with a digital signature, such as Adobe Sign.

The tax form <u>MUST</u> be signed to satisfy this requirement. Please double check and verify the form is signed and complete prior to uploading.



Once uploaded, click **Save Changes** to upload the document to your profile.

Add Tax Document				
Tax Type * Tax Document Name * Tax Document Year	W-9 Sampson Project			
Tax Documentation *	2021 ✓ Select file Drop file to attach, or browse.	Done ③ 100%×		
	Download Pre-populated Tax Document	t		
* Required to Complete Registre	ration Save Char	nges Close		

Enter the date the form was signed in the **Tax Form Signature Date** field. You may also select the date using the calendar widget to the right of the field.

Click Save Changes to save your progress and Next or Proceed to Certify and Submit to continue.

The Sampson Project		Tax Information				?
Registration In Progress for: Indiana University TEST SITE 9 of 9 Steps Complete		Tax information is used for payment and	I the tax document should	be uploaded using a PDF format.		
Welcome		Tax Document Name 🗢	Tax Type	Tax Document Year	Tax Documentation	
Company Overview Business Details	1	Sampson Project	W-9	2021	Ł View Document	Edit 💌
Addresses		Add Tax Document 👻				
Contacts	~	Additional Questions				
Diversity	-	Tax Form Signature Date *				
Insurance	-	08/24/2022				
Payment Information	-	mm/dd/yyyy				
Tax Information	-					
Supplier Information	~					
Certify & Submit						
Registration FAQ View History				C Previous	Next > Proceed to Certify and Submit	» Save Changes



Supplier Information

This section is optional for Shipping Terms

The Sampson Project		Supplier Information		
Registration In Progress for: Indiana University TEST SITE 9 of 9 Steps Complete		Watch help video here: link here		
Welcome Company Overview		Shipping Payment Terms IU Pays, Part of PO ("Prepaid and Add") v		
Business Details Addresses Contacts	* * *	St IU Pays, Part of PO ("Prepaid and Add") IU Pays, Separate Bill ("Collect") Vendor Pays ("Allowed") Paid by 3rd Party		
Diversity Insurance Payment Information	* * *			
Tax Information Supplier Information				
Certify & Submit Registration FAQ View History		★ Required to Complete Registration	Provioue	Navt N Proposed to Cartify and Submit W Savo Changes
Registration FAQ View History		\bigstar Required to Complete Registration	<pre></pre>	Next > Proceed to Certify and Submit > Save Changes

Click Proceed to Certify and Submit

Certify & Submit

Finally, verify your name, title, and email address in the appropriate fields. Prior to submission, you can review or update a section by selecting it from the left-hand menu.

The Sampson Project	Certify & Submit	?
Registration In Progress for: Indiana University TEST SITE 9 of 9 Steps Complete	Please type your initials in the box below acknowledging that you are a company official and that all information is correct. It is the Supplier's responsibility to ensure company information is accurate and that company information is kept current. Inaccurate company information may result in payment delays. Additionally, by submitting this registration, you certify all information provided is true and accurate. Knowingly providing false information may result in disqualifying	
Welcome Company Overview Business Details Addresses Contacts Diversity Insurance	you or your company from doing business with us. Preparer's Initials * A C Preparer's Name * Amanda Coats Preparer's Title * CF0 Preparer's Email Address * johnsoag+SP@iu.edu Today's Date 8/24/2022 Certification * I certify that all information provided is true and accurate.	
Payment Information	★ Required to Complete Registration	

Once you are satisfied that the information you have entered is correct, **check the box** next to **Certification** and click Submit.



Г

After submission, you will see a confirmation screen like the one below.

Registration Manage Registration Profile	
JAGGAER revised its <u>Service Privacy Policy</u> effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we put the policy of the p	rocess your personal information as described in our Service Privacy
Thank You for Registering	?
Correction Complete for The Sampson Project!	
Next Steps • You will receive a confirmation email with information on what to expect next. • Bookmark this site in your browser so you can easily make updates to your business profile. • Send new user request to an additional portal user.	
Return to the homepage and check for any other outstanding tasks. Return to Registration Profile	

Additionally, you will receive an email confirming your submission.

IU Indiana U	 buyiu.noreply@iu.edu>
To 1	now this message is displayed, click here to view it in a web browser.
in there are problems with	tow this message is displayed, then here to new it in a web blowser.
	Supplier Registration Complete for Indiana University
	Dear The Sampson Project,
	Thank you for completing your Jaggaer registration profile. Your information has been submitted to Indiana University TEST SITE and is awaiting review. The IU Supplier Workgroup will contact you with any questions they may have. As a reminder, you can log into your secure account by visiting Indiana University TEST SITE's Customer Portal Login Link
	In the meantime, we encourage you to review our <u>For Suppliers page</u> for additional information regarding the features of your new portal, including invoice submission and payment tracking. You may login to your portal at any time by visiting the <u>Jaggaer</u> <u>Customer Portal page</u> .
	Please contact the IU Supplier Workgroup with any questions by emailing or calling (812) 855-3720, option 1.
	Thank You,
	Indiana University



Registration Approval

IU Purchasing will review your information and contact you if any additional information is needed. Communication will be sent via email from the address <u>buyiu.noreply@iu.edu</u> or <u>helpmeiu@iu.edu</u>

Once your registration is approved, you will receive a confirmation email like the one below. This message will come from support@sciquest.com. This confirmation notice may take up to 48 hours to be delivered.

Welcome to the JAGGAER Supplier Network Index ×	•
SciQuest Support UserTest <support@sciquest.com> Nov 26, 2019, 11:01 AM 🛧 to me *</support@sciquest.com>	۲ :
Dear	
Congratulations! is now a member of the JAGGAER Supplier Network, which is a market-leading network of 150,000+ active unique suppliers. As a member of the network you will be able to:	
 Store basic company information in your profile and share with all customers to expedite the on-boarding process. Manage communications with all JAGGAER customers through the no fee, self-service JAGGAER Supplier Network. Reduce invoice processing time and expense through electronic submission of invoices and the ability to check invoice status when working with JAGGAER Accounts Payable Director customers. Choose between punch-out and hosted catalogs for product display, and manage catalog content and pricing from one central location. Increase your visibility to JAGGAER customers searching for suppliers to fulfill their purchasing needs. 	
basic information about your company, invite colleagues to become users of your site, and more. In order to begin taking advantage of the benefits listed above, you will first need to complete your Network Profile, which stores information about your company. It is important to complete as much information as possible in your Network Profile to ensure buyers can connect with you as a potential supplier.	
As a reminder, you can log into your secure account by visiting the link below. We recommend that you bookmark this page in your internet browser for future access. For information about using the portal, visit the Online Training and Support located on the JAGGAER Network Portal home page.	
JAGGAER Supplier Network Login Page	
Your login information is located below.	
Company:	
Email: <u>cptkirk@gmail.com</u>	
If you have any technical questions, please feel free to contact our data service provider, JAGGAER, at 1.800.233.1121 Option #3 and identify yourself as registering in the SQSupport network.	
Thank You,	
JAGGAER Support	

Congratulations! You are now a member of the Jaggaer supplier network and may receive payments from IU.



Continue Registration

Access your supplier registration by <u>logging in on the Jaggaer supplier portal</u>. Once logged in, click **Indiana University** in the Customer Portal Access section.

ñ	Home	JAGGAE			▲ ² Search (Alt+Q) Q		
í.	Orders	📸 Home > Supplier Portal Home 🔻 > JAGGAER Supplier Netw	vork Home				
1	Catalogs and Contracts	 JAGGAER revised its <u>Service Privacy Policy</u> effective May 2 information as described in our Service Privacy Policy. 	25, 2018. By closing this banner, you	acknowledge that when you use our Solution,	we process your personal X		
4	Suppliers	James Kirk	?	J∕\GG/\ _R •			
2	Sourcing	JAGGAER Network ID 1001602284 View Your Company's Network Profile		Find Invoice	2		
<u>.</u>	Reporting	Manage Customer Registrations Send New User Registration Request			Advanced Search		
<u>ي</u> د	Tools	To check payment status of an invoice or send a message to a customer reg an invoice, please enter the invoice number then click the "Search" button.					
~	10015	Create Invoice / Credit Memo	Import Invoice ?	Invoice Number(s)	Q		
e),	Administer	A No customers have authorized invoice creation for this	supplier.	Multiple value	es can be separated by a comma(,).		
-							
ų	Setup	Customer Portal Access	?	Need Assistance?	?		
		Customer Registration Status	Customer Contact	Help Search for	Q		
		Indiana University Complete	Indiana University	Browse the Table of Contents			
			View All Registrations	Training			
				Online Training and Support			

If it is the first time you are accessing your portal after your initial login, a pop-up window will appear notifying you that you are leaving the Jaggaer portal and continuing to the Indiana University portal.

Check the box next to 'Don't show me this again' and click **OK** to dismiss the message and continue.





In the IU portal, click Manage Registration Profile to continue completing the registration process.

1		SITY		
	Home Customer	Portal Home		
i.	i JAGGAER rev	rised its <u>Service Privacy Policy</u> effective I	lay 25, 2018. By closing this banner, you acknowledge that when you use	our Solution, we process your personal information as described in our
9 39	Supplier I We appreciate	and look forward to our continued	Quick Links to Common Tasks Manage Registration Profile	?
цг ПГ	business relationship. For questions, please contact us using our Support Form.		Sourcing Events	2
ф.			Show Opening or Closing Soon v No Results No Results	Go to Public Opportunities
	Name Title	Indiana University Supplier Data Management		View All Events
	Email Phone	buyiu.noreply@iu.edu +1 812-855-3720	Contracts	?

Select a section from the left-hand menu to continue registering. Sections marked with a green checkmark are complete. Gray checkmarks represent sections which require additional information.

	W INDIANA UNIVERSITY				
	Registration 🕨 Manage Registration Profile				
Í.	3 JAGGAER revised its Service Privacy Policy effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Priva				
Q	The Sampson Project		Welcome to Supplier Registration	2	
3 9	Registration Complete for: Indiana University TEST SITE		Welcome to the Indiana University Supplier Portal (TEST)		
հե	Welcome		Thank you for doing business with us. Indiana University has redesigned our process for procuring goods and services. Our goal is to make it easier to do business with ou University. Our system improvements will touch quotes, purchase orders, deliveries, and payments.	r	
	Company Overview	-	If you already have an account or are a registered supplier that has been invited to do business with Indiana University, please log in with your username and email address	i.	
67 2	Business Details	-	Registered suppliers with active login information will be able to:		
8	Addresses	~	Upload and maintain valid contact, account, and insurance documentation Receive real-time electronic delivery of purchase orders		
-	Contacts	-	Submit electronic quotes Quickly and easily submit invoices		
	Diversity	-	Review payment status Upload and update catalogs		
	Insurance	-	Important Registration Information		
	Payment Information	-	Please ensure that your legal name matches the legal name of the entity listed on the tax forms you provide us.		
	Tax Information	~	Indiana University's payment terms are NET 30 upon receipt of invoice. We make every effort to pay our suppliers in a timely manner. If you have questions or concerns, contact Indiana University Office of Procurement Services via our Support Form, or by phone at 812.855.3720.		
	Supplier Information	1			
	Registration FAQ View History				