Overview

Accessing the Administration Menu

The Administration menu is accessible to the platform Administrator. It provides access to most Administrator tasks. You can access the Administration tasks in two different ways:

Main Page

The administration tasks are available from the **Administration** section of the main page. Click on a menu option to access the tasks.
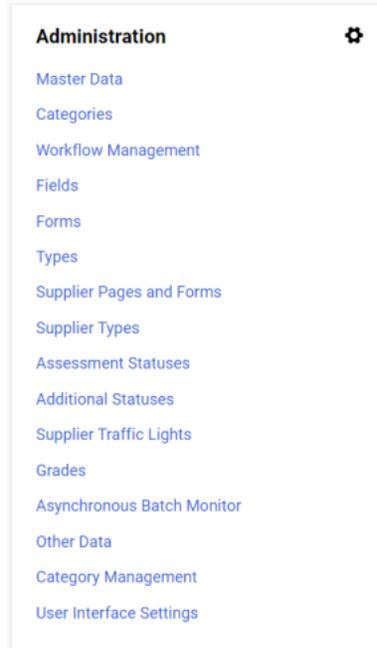
Administration Menu

Use the left-side navigation menu to access the **Administration** menu.

The list below describes each option in the **Administration** menu.

- **Master Data** - Tasks related to managing the master platform data such as units of measurement, currencies, goods groups, links between categories and goods groups, master items, and global lists.
- **Categories** - Tasks related to managing the various types of categories used for categorization and classification such as the category tree, business unit tree, regional tree, savings categories and the performance categories.
- **Workflow Management** - Tasks related to managing the available approval workflow options (RFx, Auction, contract, savings initiatives, etc.).
- **Fields** - Tasks related to managing the parameters and attributes that are used in the platform (profile questions, assessment questions, action collaboration questions, additional information, additional status questions and performance KPIs).
- **Forms** - Tasks related to configuring and managing forms that group fields together.
- **Types** - Tasks related to configuring and managing types that group the forms together for specific purposes.
- **Supplier Forms** - Tasks related to configuring and managing supplier forms that group fields together.
- **Supplier Types** - Tasks related to configuring and managing types that group the supplier forms together for specific purposes.
- **Assessment Statuses** - Tasks related to configuring and managing the various statuses related to assessments (segmentation, qualification, risk, category) as well as the internal process status.
- **Additional Statuses** – Tasks related to configuring and managing statuses related to Additional Status Directory.
- **Supplier Traffic Lights** - Tasks related to creating and manage Supplier Traffic Light dimensions and related settings as an alternative to or with Assessment objects as a means to monitor and evaluate suppliers.
- **Grades** - Tasks related to configuring and managing scoring grades, performance grades, and risk grades.
- **Asynchronous Batch Monitor** - Provides access to the **Asynchronous Batch Monitor**, which lets you view the current loads that are currently in asynchronous batch. You can download the input file and error files (if present) from the monitor screen.
- **Other Data** - Provides access to additional tasks, such as managing milestone types, relationship types, RFx decline reasons, message classification, clause folders, process alerts, supplier user default rights and contracting authority.
- **Category Management** - This menu gives you access to the setup functions for the Category Management module.

Menus and Tabs

Menu Sidebar

The table below contains a description for each main menu item. Your site may not display all the following menu options. **Important Note**: Menu items displayed depend on your organization's licensed solutions, your role and/or your specific User Rights. Some of the items below may not be applicable.

Menu Option	Description
	Clicking on the **Homepage** icon will return the user to the site page that is configured as the homepage.
	Clicking on the **Dashboard** icon will take the user to their standard/customized dashboard.
	The **Administration** menu contains all administrative tasks related to configuring the site. This includes workflow management, category tree configuration, configuration of fields/forms/types and general site settings.
	The **Sourcing** menu contains tasks related to creating and managing sourcing events.
	The **Procure to Pay** menu contains the menu options related to shopping tasks including product quick search, access to the shopping page, forms and favorites and access to carts and orders. **JAGGAER One Cross Module Integrations** customer (with appropriate permissions) can access the JI **Procurement** and **Accounts Payable** solutions from this menu option. See Cross-Module Integrations Overview for further details.
	The **Supplier Management** menu contains all tasks related to the configuration and management of your organization's suppliers.
	The **Supplier Performance** menu provides access to different types of Scorecards (supplier performance evaluations).
	The **Supplier Development** menu contains all plans related to the supplier developments.
	The **User Management** menu provides access to all internal user accounts, user roles, user divisions, users list as well as the organization details.
	The **File Sharing** menu provides access to the list of directories.
	JAGGAER One Cross Module Integrations users with appropriate permissions will see a **Contracts** menu that directs the user to the JI Contracts+ dashboard. In addition, organizations that manage their hosted catalogs, consortia or org catalog can access those features from this menu. See Cross-Module Integrations Overview for further details.
	Datamart Reports are accessed from the **Reporting** menu. The "Analytics Reports" can be also access from the **Reporting** menu, if it's enabled for the organization.
	The **Spend Visibility** menu contains the comprehensive analysis necessary to drive and measure cost savings.
	Menu Search is a keyword search that returns a list of pages containing that keyword. Search results are clickable and take you directly to the page.

- Click the home icon at the top of the sidebar to return to the dashboard, which displays every available solution.

- To extend the menu for a solution, click on the sidebar. You can move quickly between sections in a solution by clicking the section labels in the solution's extended menu. When extending menus in the sidebar, you can open up to three levels:
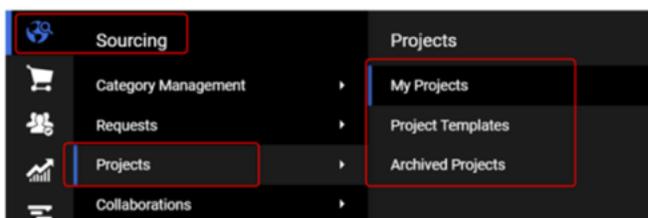
The **Menu Sidebar** and the extended menus are available in every read-only page (that is, when you are in *View* mode). However, the sidebar is not available when you are editing a page (*Edit* mode). That ensures that you won't leave a page unintentionally and lose your work.

Navigation Search

This search allows you to locate and access screens in the application without having to navigate. When activated, a **Search** icon is displayed at the bottom of the navigation bar (🔍). Click on the search icon and begin typing your search criteria. Matches display below the home icon box. Click the appropriate option and you will be redirected to that menu:
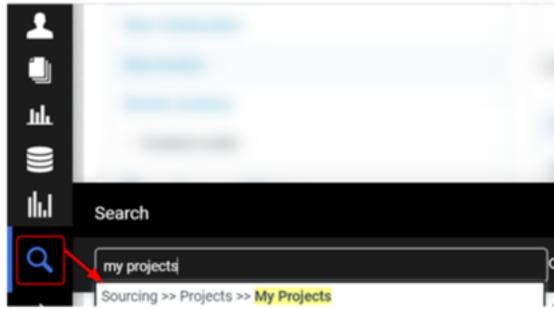
Tabs

Navigate to the **My Projects** page via your homepage portlets or by clicking **Sourcing** ⚙ **> Projects > My Projects** in the expanded menu sidebar.

Each tab at the top of the **My Projects** page displays a different section within the Projects area:

Tab	Purpose
My Projects	This list displays all the projects to which you have access.
Project Templates	Templates define standard sourcing processes, including tasks and approvals, to be used as the basis of any projects created by buyers within the organization.
Archived Projects	Archiving supports a process to remove closed projects from the My Project List, making the My Project List easier to read and search.

Use these tabs to easily navigate between the sections.

Note: The active tab is always highlighted with a different text and background color:
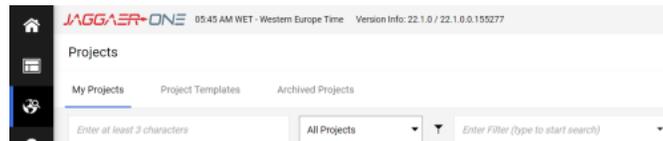
Cross-Module Integrations Overview

JAGGAER One Platform provides access to all the best in class products from our solution portfolio. By using an integration solution among all products, customers have access to streamlined common platform **Process Flows** across multiple modules in a single solution. The **JAGGAER One Cross Module Integrations** allows customers to accomplish business goals by providing procurement teams with a holistic solution that drives continuous savings, ensures cost compliance and enforces increased efficiency and effectiveness across the entire procurement lifecycle.

JAGGAER One Cross Module Integrations enable organizations to streamline their users and suppliers onboarding processes and allow users to leverage additional procurement processes between the different JAGGAER One modules.

Cross Module Integrations include:

- **JAGGAER One Buyer Identity Management (IDM) and Single Sign-On (SSO)** - JAGGAER's SSO solution enables Internal users to sign on from a single location to access all solutions. In addition, customers who activate JAGGAER One Buyer IDM have access to additional features, such as the option to use JAGGAER as their identity provider (IDP), use an external IDP, or implement a hybrid approach that allows buyer users to select whether to authenticate through JAGGAER or an external system. Note that JAGGAER One Buyer IDM is required for some Cross Module Integrations. If required and your organization has not already activated JAGGAER One Buyer IDM, your JAGGAER representative will inform you of the requirement when you request activation of the integration.

- **Buyer User Management and Synchronization** - Buyer users are created and managed in the primary system of record (either JI or JD, depending on customer configuration) and synced across all solutions. Additional buyer user fields that are specific to a particular core (JI, JD, or JD) will be managed in that core, but most fields are read-only in secondary systems and can only be edited in the primary system of record.

- **JAGGAER One Global and Customer-Specific Supplier Identity Management (IDM)** - JAGGAER's Supplier IDM solutions enable supplier users to sign on from a single location to access all solutions. JAGGAER offers two versions of Supplier IDM. JAGGAER One Global Supplier IDM is a non-customizable authentication and access solution that offers a universal sign-on experience for suppliers, regardless of customer. JAGGAER One Customer-Specific Supplier IDM offers additional options for customers to customize the supplier login experience to meet enhanced security policy requirements or to support authentication through an external identity provider (IDP). The version of Supplier IDM implemented for your organization is determined primarily by the method used to synchronize suppliers and supplier users from the primary system of record to secondary systems.

- **Supplier Management+, Direct Supplier Management, and Supplier Management** - Suppliers are created in the primary system of record (either Supplier Management+ or Direct Supplier Management, depending on customer configuration) and synced across all solutions. After registration and onboarding, the main supplier data is managed in the primary system of record. Additional supplier fields may be managed in the applicable solutions.

- **eProcurement Purchase Requisition to Sourcing+ Draft RFQ** - Users can create an RFQ from a purchase requisition during the workflow process.

- **Sourcing+ RFQ to eProcurement Purchase Requisition** - Customers can create requisitions from awarded RFQs, including the transfer of supplier bid prices and attachments.

- **Sourcing Request to Sourcing+ RFQ** - Buyers can create RFQs in Sourcing+ from Sourcing Requests in workflow.

- **Sourcing+ RFQ/Auction to Contracts+** - Customers can create and manage a contract in Contracts+ from a Sourcing+ RFQ or Auction.

- **Sourcing+ Bid Collector to Contracts+** - Customers can create and manage a contract in Contracts+ from a Sourcing+ Bid Collector.

- **Sourcing+ Category Strategy to Contracts+** - Customers can generate contracts and link the associated Strategy with the Contract.

- **Sourcing+ Program Management to Contracts+** - Customers can generate contracts within projects and link the associated projects and project tasks with the Contract.

- **Sourcing+ Program Management to Direct Sourcing RFQ** - Customers can create RFQs in Direct Sourcing that are link to projects and project tasks in the Sourcing+ Program Management Solution.

- **Sourcing+ Category Strategy to Direct Sourcing** – Customers can create new Direct Sourcing RFQs, link existing RFQs, view statuses, and unlink RFQs from within the Implementation area of a Category Strategy.

- **Direct Sourcing RFQ to Contracts+** - Customers can generate a Contracts+ contract from an awarded Direct Sourcing RFQ, leveraging the negotiated bid prices that the supplier submitted as well as transferring attachments and other useful information.

- **Advanced Sourcing Optimizer RFQ to Contracts+** - Customers can generate a Contracts+ contract from a Sourcing Optimizer Sourcing event, including negotiated bid prices, attachments, and other information.

- **Enabling Contracts for eProcurement** - An existing contract in Sourcing+ can be enhanced in the eProcurement solution, thereby allowing contract items to be shopped and invoiced.

- **Enabling J1 Label Trees for Contracts+** – The JA Core has long allowed customers to manage label trees and to link leaves or intermediate nodes to JA business objects. J1 Label Trees extend this functionality to the J1 level, allowing Contracts+ to leverage the label trees that are managed in JA. Label trees are available for the following business objects: Categories, Business Units, and Regions.

- **Contracts+ to Supplier Management+ Scorecard** – Customers can create scorecards in Supplier Management+ from contracts in Contracts+, allowing them to evaluate and rate the supplier's performance and navigate between Contract and Scorecard.

- **Contracts AI Provisioning and Integration with Contracts AI** – Customers can exchange data between Contracts+ and Contract AI, allowing customers to easily submit Contracts+ contract documents to Contracts AI for analysis.

- **Supplier Management Download to Advanced Sourcing Optimizer RFQ** – Customers can access the Supplier Management solution and add suppliers to an ASO event.

- **Supplier Management+ Supplier 360 – Contracts by Status** – Customers can view a graphical representation of the number of Contracts+ contracts for each status in a widget on the Supplier 360 page in Supplier Management+.

- **Supplier Management+ Supplier 360 – Direct Sourcing** – Customers can view the number of Direct RFQs, Direct auctions, and direct bills of material (BOMs) as well as a pie chart that breaks down the number of Direct RFQs by status in two widgets on the Supplier 360 page in Supplier Management+.

- **Supplier Management+ Supplier 360 – JI Invoices** – Customers can view a list of JI invoices for a supplier in a widget on the Supplier 360 page in Supplier Management+. Customers can also open the invoices in the JI Invoicing solution from links in the widget.

- **Supplier Management+ Supplier 360 – eProcurement Purchase Orders (POs)** – Customers can view a list of eProcurement POs for a supplier in a widget on the Supplier 360 page in Supplier Management+. Customers can also open the POs in the JI Invoicing solution from links in the widget.

- **Direct Supplier Profile – Linked Contracts** – Customers can view a list of Contracts+ contracts for a supplier from a box in the supplier's Company Dashboard in Direct Supplier Management.

- **Supplier Network Access** - Suppliers access customer sites from a single log in and can navigate between solutions applicable to their customer relationship and user permissions.

> **Note**: Each user's access to the integrated solutions depends upon the organization configuration and the user's specific permissions and user rights.

JAGGAER One Solution Menu

Customers can request JAGGAER to enable the **Solution Menu** instead of the default menu navigation as explained above. The **Solution Menu** allows users to switch between JAGGAER One solutions, and options are displayed according to the organization's license and users' roles. The JAGGAER One **Navigation** feature includes two main items:

- Solution Menu

- Left Side Menu

> **Note**: The **Solution Menu** can ONLY be enabled for customers having the **Buyer IDM**.

Solution Menu

- The **Solution Menu** () icon allows the users to access the solution navigation menu. Each solution has a set of specific menu items in the left navigation side.
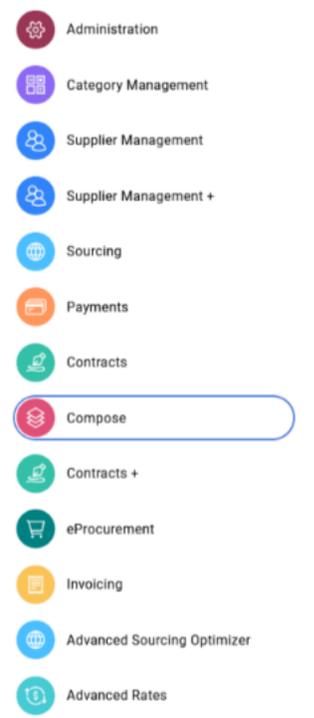
- Users can ONLY see the solutions according to the organization's licenses and their user rights/roles.

- Each solution is associated with an icon and specific color.

- Choose your default landing page by selecting the **Settings** (gear icon) and choose the desired solution from the **Make Default** option, then click **Save**.
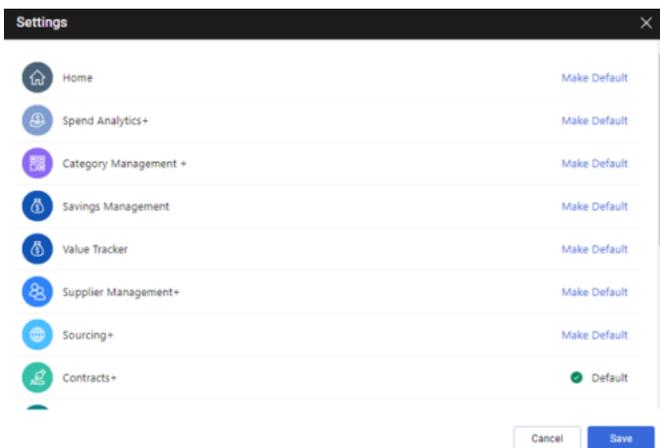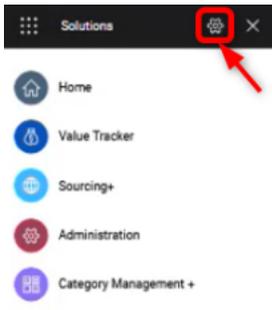
- Users can also see the translated solution names according to the selected user profile language. For example, if a user's selected language is Italian, then all the solution names will be displayed in the Italian language.

- Label customization is not supported.

- The **Solution Menu** can be re-branded by the buyer organization. **Note**: Customers must contact their JAGGAER representative to request the re-branding (including Menu themes and colors, NOT logos, icons or labels). Users may see a different look and feel from the images in this release note if the **Solution Menu** is re-branded.
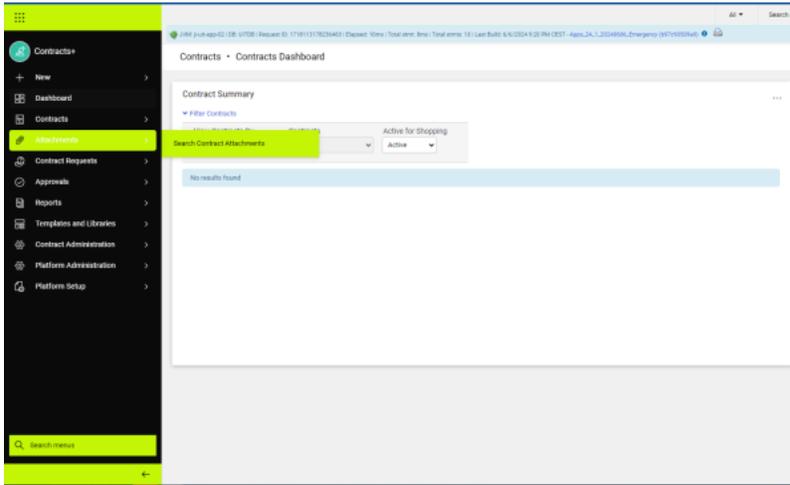
Left Side Menu

Once a solution is selected from the **Solution Menu**, the **Left Side Menu** with navigation options related ONLY to the selected solution are available.

For example, if Sourcing+ is selected from the Solution menu, users will see the navigation options related to Sourcing+, such as: Projects, Notices, Templates, etc.

- Initially, a "skeleton" image displays on the left side when a Solution is selected.

- Then, the selected Solution navigation icons are displayed. By default, only the icons are displayed.

- Hover over the icons to see the menu navigation option:
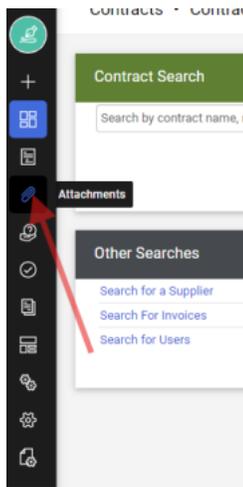
- Or, select the arrow at the bottom of the left navigation to expand and see menu options.
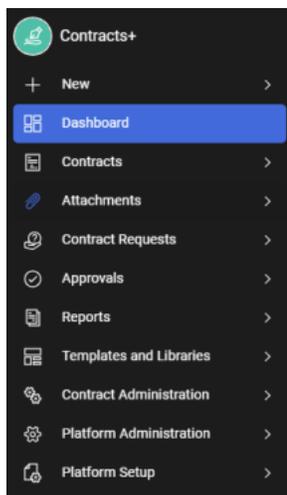
- Buyer users can search for specific area of the application (across JAGGAER One solutions) via the search option (🔍) available in the left side menu, as with the traditional menu navigation interface.

Administration Options with Left Side Menu

If **Solution Menu** is enabled for an organization, **Administration** menu options are included in each solution specific menu.
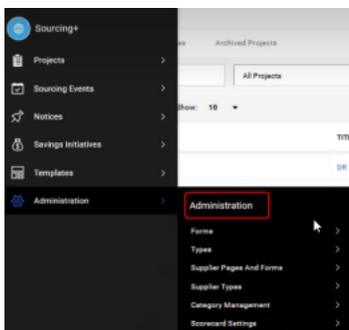
Users access the **Administration** menu option required for configuration when selecting specific modules such as Sourcing+, Category Management, eProcurement, Contract+ etc. The visibility of the **Administration** menu option depends on the user's roles/permission.

JAGGAER One Cross-Module Integrations Configuration

JAGGAER and customer users jointly participate in configuring the **JAGGAER One Cross Module Integrations** by ensuring the proper settings are enabled for both JA and JI solutions. See below topics for configuration of UOM, Currency and Goods Group for **JAGGAER One Cross Module Integrations** customers:

- Units of Measurement

- Currencies and Currency Exchange Rates

- Goods Groups

Supplier Validation

JAGGAER's solution provides a buyer with access to a network of suppliers and enables the buyer to engage with and validate its supplier counterparties. Validating suppliers and their offerings and contracting with those suppliers remains the buyers' sole responsibility.