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1.0. Overview

About this Guide
This guide is intended for use by those with B2P access to use the Supplier Portal including supplier searches, supplier invitations, supplier requests, and supplier maintenance requests.

About Our Learning Objectives
We have developed specific Learning Objectives to provide you with the necessary knowledge you will need to use the Supplier Portal effectively.

The general Skills, Knowledge and Decisions that are expected once the learning objectives are accomplished are listed below.

<table>
<thead>
<tr>
<th>Skills</th>
<th>Knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Search for a supplier in the directory</td>
<td>• Benefits of the supplier portal</td>
</tr>
<tr>
<td>• Invite a supplier</td>
<td>• Business process changes associated with the supplier portal</td>
</tr>
<tr>
<td>• Request a supplier</td>
<td>• Roles and responsibilities of Requestors and Central Supplier Onboarding Team</td>
</tr>
<tr>
<td></td>
<td>• How to access and navigate the supplier portal</td>
</tr>
<tr>
<td></td>
<td>• Supplier onboarding options to support procurement transaction activity</td>
</tr>
<tr>
<td></td>
<td>• Available support resources and where to access them</td>
</tr>
<tr>
<td></td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Decision</td>
<td>Evaluate when to invite vs. request a supplier</td>
</tr>
</tbody>
</table>
1.1. B2P Business Process

Learning Objectives

The goal of this reference guide is to reinforce the following training objectives:

- Learn about the benefits of the B2P Supplier Portal
- See a high-level Supplier Onboarding Map
- Understand responsibilities of the supplier portal user, supplier, and supplier onboarding team
- Recognize the capabilities and considerations for each role
- Learn new functionality provided by the Supplier Portal
- Understand the preferred process for different types of Suppliers

Benefits of B2P Supplier Portal

**Efficiencies**
- Direct Invitations to Suppliers
- Streamlined and automated workflow
- Self-service Supplier portal for data entry and documentation upload

**Ease of Use**
- Questionnaire based registration process with checklist to completion
- Questionnaire based supplier request

**Visibility**
- Supplier directory search ability include sites, supplier type, diversity status, and contact information
- Export capabilities
- Saved search functionality
- Status inquiries

**Compliance**
- Integration Debarment verification
- Duplication verifications
- Supplier attestations for conflicts of interest and site use agreements
- Tax Documentation collection

**Classification**
- Diversity classification
- Industry Service and Goods classification (NIGP)
- Nation, State and Local

**Communication**
- Use emails and system notifications to advise on Supplier status

**New Practices and Procedures**
- Portal users initiate onboarding and automated checks are performed prior to approval – departmental approval is no longer required
- Supplier requests are not visible to all users, but approved suppliers appear in a searchable directory and are available in HCOM for processing payments
- Tax documentation collection can be managed by the supplier
- Duplication checks will minimize duplicate requests and invitations
- Invitations to Companies and Individuals is the preferred format to ensure the representative or individual is responsible for the accuracy and timely completion of their own payment and contact information
- Maintenance Requests can be utilized to continue Harvard initiated maintenance for complex organizations with multiple sites (e.g. Universities, Hospitals, National Hotel chains, etc.)
Departmental Role in B2P Supplier Portal

<table>
<thead>
<tr>
<th>Role</th>
<th>Role Description and Responsibilities</th>
</tr>
</thead>
</table>
| Supplier Portal User| Supplier Portal Users will have the ability to initiate the onboarding process with a given company or individual. They have three tools to initiate onboarding activities including invitations (preferred), supplier requests (exceptions), and maintenance requests. Approved Supplier Portal activity will export to HCOM where requisition and invoice activity will continue to occur until future B2P eProcurement and AP modules have been deployed. Supplier Portal Users will be responsible for overseeing the status of their supplier requests to communicate when a supplier is active for use in HCOM. Responsibilities of a Supplier Portal User:  
  • Ensuring supplier requests are reasonable and appropriate  
  • Disclosing any conflicts of interests with suppliers  
  • Initiating supplier invitations, requests, and proxy registrations for individuals/companies in a timely manner  
  • Completing any relevant training such as ROPPA  
  • Understanding and adhering to relevant policies and procedures including:  
    • [Procurement Policy](#) With special attention to [Appendix A: Conflict of Interest](#)  
    • [Independent Contractor Policy](#)  
    • [Responsibilities of Purchasers, Preparers, & Approvers (ROPPA)](#)  

A complete list and summary of financial policies may be found at the [Financial Policy](#) website.

<table>
<thead>
<tr>
<th>Role</th>
<th>Role Description and Responsibilities</th>
</tr>
</thead>
</table>
| Strategic Procurement Supplier Onboarding Team | The Strategic Procurement Supplier Onboarding Team is responsible for the following:  
  • Ensuring proper tax forms have been completed and documented  
  • Data QC, ensuring backup documentation matches system entry  
  • Reviewing additional compliance checks, such as:  
    – Duplicate TIN, Email, Name  
    – Government Watch Lists (debarment)  
  • Activating supplier registrations |
High Level Business Process

The high-level business process shows each of the potential steps a supplier must go through before becoming active for use. The preferred method for onboarding a supplier is to use an invitation, however, there are special exception scenarios that require a request to be submitted on the company or individual’s behalf. The following sections will detail when it is appropriate to use an invitation and when it is appropriate to use a request.

Figure 1 – Supplier Portal Process Overview

About Invitations

Invitations allow a direct communication between the Harvard representative and the company or individual. The invitation requires a company name (or individual name) and an email address. The recipient of the invitation email will be guided through an account creation process for the Jaggaer Supplier Network, and then a Harvard registration questionnaire that includes collection of the following types of information:

- Company or Individual Information
- Address and Contact Information
- Diversity Classification
- Tax Information
- Payment Information

Once a registration has been completed by a company or individual, the completed registration is immediately routed through a standard workflow process prior to approval, that includes an integration with government watch lists and duplication checks.
In the event an original invitation was not received or acted upon, the invitation can be easily resent by a Supplier Portal user (or the supplier onboarding team). Each invitation is historically recorded within the supplier profile to document the time, date, and user that initiated the invitation.

The invitation is the preferred method of onboarding a supplier to ensure accurate information is collected directly from the representative. Additionally, the registration contains necessary confirmation and attestation statements to ensure the company or individual is certifying the accuracy of their own information. Registration in the Supplier Portal will also prepare the company or individual for upcoming B2P functionality including payment status inquiries, electronic invoice submission, electronic order transmission, and much more.

About Forms (Supplier Requests)

Supplier Requests facilitate exceptions, internal requests, and other scenarios that otherwise cannot follow an invitation process, including:

- Foreign Individuals with complex Visa documentation requirements
- Harvard Registered Students
- Recipients of Business Reimbursement Expenses
- Maintenance requests for complex organizations include site adds, deletes, and payment updates
- Internal data management (e.g. supplier type updates, submission of additional GLACIER documentation, etc.)

As shown in Figure 1 – Supplier Portal Process Overview, there are instances where a supplier requests must be made to the supplier onboarding team, rather than through a direct invitation. For example, a supplier request for a Non-US citizen may be used to initiate the GLACIER account creation and email notification. Alternatively, if a supplier request has been used to facilitate a proxy registration, the request will require more complete documentation to ensure the supplier onboarding team can perform an expedited onboarding process.
**Decision Tree**

**When to use Invitation vs. Request Form**

As stated, Invitations are the preferred method for onboarding a Company or Individual, however, several special processes can be accommodated to ensure the most efficient onboarding process is used.

Figure 2 – Decision Tree

*“Complex Supplier” refers to a supplier where a single point of contact cannot maintain all supplier information, such as a large hospital, hotel chain, or university.

*BER = business expense reimbursement
1.2. Supplier Search

To minimize the chance of adding a duplicate supplier, it is best practice to search the supplier directory before inviting or requesting a new supplier. The Supplier Portal features two options for performing searches:

1) Simple search – Enter search terms such as Legal Company name or Supplier ID
2) Advance search – Options for additional search terms such as type, class and diversity status, among others

In each case, the Supplier Portal search does not require wildcard or case-sensitive searching.

Searches can be saved for future use as well as shared with other users.
1.3. Invitation to a Company or Individual

About Invitations

Invitations are transmitted immediately after a Harvard supplier portal user click “Invite Supplier” upon entering in the company or individual name and email address. The invitation is transmitted from vendorsetup.ufs@harvard.edu with an email subject of “Supplier Invitation from Harvard University”. A sample of the email can be found in Figure 12 - Supplier Invitation.

The recipient will be required to create a Jaggaer Supplier Network Account. In doing so, the supplier will have access to manage multiple accounts, should they happen to do business with other Jaggaer Supplier Network users. After account creation, the recipient will be required to complete a basic questionnaire that collects required information to do business with Harvard University. The supplier will also be able to update their information and contact information, as necessary. Their completed registration, and any subsequent changes, are subject to a standard workflow review process prior to being active for use. The below figure illustrates the Invitation Process.

| Invitation Process |
|--------------------|-----------------|-----------------|
| Supplier Portal User | Invitation Sent | Supplier Portal | Oracle |
| Company or Individual | Invitation Received | Registration Completed | Supplier Verification (Duplication, Debarment, TIN, Payment) |
| Supplier Onboarding Team | Registration Received | Supplier Approved | Supplier Active for Use |

Figure 4 – Invitation Workflow

**Required Information**

Required Information:
- Supplier Registration Type (Company or Individual)
- Supplier Legal Name
- Supplier Email Address

**Additional Information (not required):**
- Supplier Contact Name
Invitation Considerations

Invitations can be resent at any time by the supplier portal user or the vendor onboarding team by accessing the supplier profile and choosing “resend invitation” in the action items menu. For more information refer to the tip sheet “Sending a Supplier Invitation”.

Once an invitation is sent, the supplier’s profile is created and searchable in the supplier directory. You can check the status of the supplier’s registration by navigating to their supplier profile and clicking Workflow and Review > Supplier Registration Workflow. For more information refer to the tip sheet “Searching for a Supplier”.

Suppliers are sent a reminder notification periodically to complete their registration. Please note, the supplier must complete their registration before the supplier onboarding team can review their registration and activate them for use. It is the supplier’s responsibility to complete the registration or contact the supplier onboarding team for assistance. Additionally, supplier portal users should proactively communicate with the supplier contact to facilitate and reinforce the expectation of supplier portal registration completion and impact to timeliness of payment.

The Jaggaer Supplier Network has many video training tutorials, user guides and live support to assist suppliers with completing their registration.
1.4. Supplier Request

About Supplier Requests

Supplier requests may be required as an alternative to the invitation in the following types of scenarios:

- Harvard Registered Students (US Citizens and Permanent Residents Only)
- Business Reimbursement Expenses for Foreign Individuals (BER)
- Temporary Vendors (Refunds)
- Maintenance requests for complex organizations include site adds, deletes, and payment updates
- Other rare exceptions that may require the Harvard Supplier Portal User set-up the supplier.
- Internal data management (e.g. supplier type updates, submission of additional GLACIER documentation, etc.), reactivating a vendor

Supplier requests can be submitted as an alternative to the invitation. Please see, *Figure 2 – Decision Tree* for more information on appropriate use. A supplier request is submitted directly from the supplier portal user to the supplier onboarding team for review. The supplier onboarding team may elect to 1) transition the request to an invitation for a Company or individual; with no other special considerations, 2) return or reject the request, or 3) approve the supplier for use. Alternatively, a “proxy” request can be selected which would require the supplier portal user to enter and complete all the supplier information required to be set up in the system. A “proxy” request requires the supplier portal user to collect, enter and upload all relevant supplier information and documentation. This process is not recommended since it requires the supplier portal user to collect and handle high-risk confidential data. Supplier Request workflow has been illustrated in the figure below.

![Supplier Request Process Diagram](image-url)

*Figure 5 - Supplier Request Process*
Supplier Request - Harvard Registered Student – US Citizen or Permanent Resident

An enrolled Harvard student who is a US Citizen or Permanent Resident (sometimes called a Green Card Holder) may be set up via the request process to expedite the onboarding process. Please note, the supplier portal user can elect to transmit an invitation to allow the student to complete a normal individual registration process. This will allow students to easily edit their own information, such as frequently changing addresses. Additionally, new payment functionality will be rolled out in future B2P releases to offer easier methods for receiving payment which may only be set up by the student.

If an invitation is not appropriate, such as situations where the student is receiving a payment which the school or unit wishes to keep it confidential until the time of the presentation, submitting a supplier request rather than an invitation is acceptable to facilitate payment process setup prior to delivering the payment.

**Required Information:**
- Supplier Request Type (Company or Individual)
- Supplier Legal Name
- Supplier Email Address
- Supplier Citizenship (Individual – US Citizen or US Permanent Resident)
- Supplier Address (tax address and address where payment will be sent)
  - The fulfillment address will be the tax reporting address.
  - The remittance address will be where the payment will be sent and may be the same as the fulfillment address.
- Supplier HUID

**Additional Information (not required):**
- Supplier Phone Number
- Supplier Local Address (if one exists)
- Any additional comments that may be helpful to the Central Supplier Onboarding Team

---

**Supplier Request Process**

<table>
<thead>
<tr>
<th>B2P</th>
<th>GLACIER</th>
<th>Supplier Portal</th>
<th>Oracle</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Supplier Portal User]</td>
<td>![GLACIER Invitation Received]</td>
<td>![GLACIER Registration Completed]</td>
<td>![Supplier Active for Use]</td>
</tr>
<tr>
<td>![Request Completed]</td>
<td>![Invitation Received]</td>
<td>![Supplier Registration Completed]</td>
<td></td>
</tr>
<tr>
<td>![Individual]</td>
<td>![GLACIER Documents Provided?]</td>
<td>![Invitation Sent]</td>
<td></td>
</tr>
<tr>
<td>![Yes]</td>
<td>![No]</td>
<td>![Supplier Verification (Duplication, Debarment, TIN, Payment)]</td>
<td></td>
</tr>
<tr>
<td>![Yes]</td>
<td>![Supplier Approved]</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Figure 6 - Supplier Request for a Non-US Individual*
Supplier Request - Business Expense Reimbursement for Foreign Individuals (BER)

Supplier type Business Expense Reimbursement (BER) allows Supplier Portal Users to reimburse foreign individuals (aka Nonresident aliens or 1042S vendors) who do not have a prior payment relationship with Harvard and are only being reimbursed for Harvard business expenses. Foreign payees can bypass the GLACIER process, since they will not be paid income. Harvard administrators or portal users must submit any signed certification forms and required copies of immigration documents along with each Non-Employee Reimbursement (NR) Payment Request in order to support that the individual is legally allowed to be reimbursed by Harvard. Payment cannot be processed without this required information. The vendor record will be active for 90 days, to allow all reimbursements to be processed. See https://nratax.oc.finance.harvard.edu/reimbursement-business-expenses for more information.

Required Information:
- Supplier Request Type (Individual)
- Supplier Legal Name
- Supplier Email Address
- Supplier Citizenship (Individual – Non-US Citizen)
- Supplier Visa Type (visa type should be known when confirming that Harvard can legally issue a reimbursement to the individual. See Commonly Seen Visa Types at Harvard).
- Supplier Foreign Address
  - The fulfillment address will be the tax reporting address and must be a foreign address.
  - The remittance address will be where the payment will be sent and may be the same as the fulfillment address.

Additional Information (not required):
- Supplier Phone Number
- Any additional comments that may be helpful to the Central Supplier Onboarding Team

Supplier Request - Temporary Supplier

A temporary supplier is typically set up to receive a one-time REFUND payment. This type of payment is non-tax-reportable and is active for 30 days. Temporary Supplier should not be used to process reimbursements.

Required Information:
- Supplier Request Type (Company or Individual)
- Supplier Legal Name
- Supplier Email Address
- Supplier Citizenship (Individual – US Citizen or Permanent Resident or Individual – Non-US Citizen)
- Supplier Visa Type (use N/A if individual is entering U.S. but you do not know visa type.) Select NE- No Entry If individual is not entering the U.S.
- Supplier Foreign Address
  - The fulfillment address will be the tax reporting address and must be a foreign address.
  - The remittance address will be where the payment will be sent and may be the same as the fulfillment address.

Additional Helpful Information:
- Supplier Phone Number
- Any additional comments that may be helpful to the Central Supplier Onboarding Team
### Supplier Request Process

<table>
<thead>
<tr>
<th>Offline</th>
<th>B2P</th>
<th>Supplier Portal</th>
<th>Oracle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier Portal User</td>
<td>Request Completed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual</td>
<td>Information Packet completed offline and delivered to Harvard Admin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplier Onboarding Team</td>
<td>Request Received</td>
<td>Supplier Verification (Duplication, Debarment, TIN, Payment)</td>
<td>Supplier Approved</td>
</tr>
</tbody>
</table>

**Figure 7 - Supplier Request (Proxy)**

#### Proxy Supplier Request

The Proxy Supplier Request is a process where a Harvard Supplier Portal User would collect all information and required documentation for a supplier and create the request manually rather than the supplier completing the request. This is not a recommended practice and should be rare and would generally only be in cases where the supplier has limited access to the internet or an individual requiring VIP or “white glove” handling by Harvard.

Most US individuals or companies or non-US companies *should* be able to be set up through the invitation process.

Most Non-US Individuals can be set up through the supplier request process (not Proxy Supplier Request). Non-US Individuals must be onboarded through a two-step process which includes both a Supplier Portal Registration, as well as a GLACIER registration. The supplier request form ensures the non-US individual receives an invitation from GLACIER *before* an invitation is sent from the Supplier Portal. The supplier request process for a non-US individual with GLACIER requirements is illustrated in the figure below.
### Supplier Request Process

<table>
<thead>
<tr>
<th>Offline</th>
<th>Supplier Portal</th>
<th>Oracle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier Portal User</td>
<td>Proxy Request Completed</td>
<td>GLACIER documentation Received</td>
</tr>
<tr>
<td>Information Packet completed offline and delivered to Harvard Admin</td>
<td>GLACIER Invitation Received</td>
<td>GLACIER Registration Completed</td>
</tr>
<tr>
<td>Non-US Individual</td>
<td>Request Received</td>
<td>No GLACIER Documentation</td>
</tr>
<tr>
<td>Supplier Onboarding Team</td>
<td>Supplier Verification (Duplication, Debarment, TIN, Payment)</td>
<td></td>
</tr>
</tbody>
</table>

Figure 8 - Supplier Request (Proxy - No GLACIER Documentation)

If a Supplier Portal User completes a Proxy Registration, they must collect all appropriate documentation including W-9, W-8, and GLACIER documentation (if required) as well as other High-Risk Confidential Data (HRCI). The supplier portal user must follow Harvard’s [Information Security Policy](#) regarding the storage and destruction of this information.

**Required Information**
- Supplier Request Type (Company or Individual)
- Supplier Legal Name
- Supplier Email Address
- Supplier Citizenship (if individual)
- Supplier Addresses (fulfillment, remittance and physical)
- Supplier Visa Type (if individual)
- Supplier Completed Tax Forms (vary based on supplier type)
- Supplier Completed GLACIER packet
- Tax Document Year
- Tax ID Number
- Country Issuing Passport
- Date of Birth
- Visa Sponsorship
- Confirmation regarding Foreign Individuals Eligible to Receive Payment by Harvard

**GLACIER Documentation**

When completing a proxy supplier request for a non-US citizen, the proxy section will ask the supplier portal user whether GLACIER documentation has been provided. In limited scenarios, the non-US citizen may have already completed a GLACIER registration process and forwarded the appropriate documentation to their Harvard representative for processing. However, in the event the foreign individual has not completed a GLACIER registration, the supplier request can still be submitted to initiate a GLACIER account creation. For
information on completing a proxy Supplier Request please refer to tip sheet, “Submitting a Supplier Request”. In this specific scenario, the supplier portal user can submit a follow-up maintenance request to forward any GLACIER documentation collected after the fact. The maintenance request process has been illustrated below.
1.5. Supplier Maintenance Request

The supplier maintenance request can be used to request changes to a supplier record. Please note, the preferred method of ongoing supplier maintenance is to provide the supplier representative access to the supplier portal via an invitation. However, there are scenarios where a maintenance request is appropriate including maintenance to a complex supplier profile (e.g. hospital, university, or national hotel chain). The maintenance request has the following options:

- Site Adds/Reactivation/Inactivation
- Supplier Name Change
- Change Supplier Type
- Payment Method Change (Note: this option does NOT facilitate Wire Transfer request. Please see https://otm.finance.harvard.edu/pages/cash-management for information on initiating wires.
- Other
- Proxy GLACIER documentation for Non-US citizen

For more information on initiating a supplier maintenance request please refer to tip sheet “Supplier Maintenance”. The maintenance request process is illustrated below.

![Supplier Maintenance Request Process Diagram]

Figure 9 - Supplier Maintenance Request
1.6. Notifications & Emails

B2P will send several useful emails to companies, individuals, and supplier portal users. Below are sample emails that will be sent from vendorsetup.ufs@havard.edu. Please note, the language in these emails may change.

Additionally, notifications (which are messages stored within B2P’s notification center) are available for tracking action items that may require a supplier portal user’s attention, including returned supplier requests, rejected supplier requests, and activated suppliers. For information about where to find notifications, please refer to tip sheet, “Submitting a Supplier Maintenance Request”

Emails to Supplier Portal Users (Harvard)

![Figure 10 - Notice of Supplier active for use](image)

RE: Supplier Request Returned for Sample Corporation

Dear [name],

Your supplier request was returned by: Sample Approver

The reason for the return was: Please attach latest tax document

To modify this request and resubmit after corrections, click the link below:

[Click here to view the request in your organization’s site]

If you have any questions with regards to this request, please contact the assignee who returned the request or your SelectSite Support Team.

Thank You,

[Contact Information]

![Figure 11 - Notice of Supplier Request Return](image)
Emails to Companies or Individuals

Supplier Invitation from Harvard University

Attention Sample Corporation representative,

Harvard University has invited you to register as a potential supplier. Our supplier network is a best-in-class Supplier Registration and eProcurement system that provides a one-stop, complete solution for buyer and supplier interaction.

Becoming a Harvard University network supplier is free, easy and it only takes a few minutes to join. By selecting the “Register Now” button below, you will be routed to a secure website to complete the registration process. Upon successful completion of your registration, you will have access to your secure portal where you can add additional details about your organization, invite colleagues to become users in your site, and more.

Register Now

Thank You.

Harvard University

For technical support related to issues logging into the portal, adding attachments, browser errors, or other technical problems, please contact J2G support at https://www.j2g.com/service-support/supplier-support/.

For Harvard specific support, including attaching appropriate documentation or completing registration information, contact +1 617-495-8500 ext. 3 or vvendorsetup_uts@harvard.edu.

For more information on doing business with Harvard, current and future sourcing events, diversity initiatives, and other procurement related information, please go to procurement.harvard.edu.

Figure 12 - Supplier Invitation

Supplier Registration Complete for Harvard University

Dear Sample Corporation,

Thank you for completing your registration profile on the Harvard University Supplier Portal. Your registration will be reviewed and, if appropriate, approved for use.

As a reminder, you can log into your secure account by visiting Harvard University’s Customer Portal.

Login Link

Thank You,

Harvard University
vendorsetup_uts@harvard.edu
+1 617-495-8500 ext. 3

Figure 13 - Confirmation of Registration
1.7. Additional Support Resources

Training and FAQs
- Buy-to-Pay group on Harvard Training Portal: Join the group to access courses and support resources
- Buy-to-Pay Website: for project information and FAQs

Support
- Harvard Users
  - For questions or issues on supplier requests contact Supplier Onboarding Team at (617) 495-8500, ext. 3 or vendorsetup_ufs@Harvard.edu.
- Suppliers
  - For technical support related to issues logging into the portal, adding attachments, browser errors, or other technical problems, contact Jaggaer Supplier Network Support at (800) 233-1121 or https://www.jaggaer.com/service-support/supplier-support/.
  - For Harvard specific support, including attaching appropriate documentation or completing registration information, contact (617) 495-8500, ext. 3 or vendorsetup_ufs@Harvard.edu.