

Supplier Information Management (SIM) – Supplier Relationships

Ivalua Quick Reference Guide

This Quick Reference Guide (QRG) is a supplement to the initial Supplier Information Management (SIM) QRG Guide and focuses on managing supplier relationships within in the Ivalua platform.

Relationships Module: Managing Supplier Relationships

A supplier may have multiple relationships with the various BAE Systems businesses. These relationships are displayed within the **Relationships** module and is accessed from the left-hand navigation window. Click the **pencil** icon next to the supplier Relationship ID to access the information for that supplier relationship.


*For **migrated suppliers** from the HICX Portal, there may be remaining tasks from the Global Supplier Record Enrollment Preparation validation that must be completed in addition to the Supplier Relationship tasks outlined in this guide.

For those **suppliers that were not migrated from the HICX Portal, the Global Supplier Record Enrollment Preparation validation must be completed before the steps outlined below can be accessed.

Once the Supplier Relationship onboarding has started, you will receive a notification to complete the Supplier Relationship Enrollment Preparation(1) and Document Upload(2) steps. Follow the steps below to complete this process.

1. Enrollment Preparation

- A. At the Home screen, click on the **Bell** icon at the top right to access the **Pending validations** module. Click the **pencil** icon to start the validation process.

Validations		See 1 result	
Process	Object	Action	Due date
 Supplier Relationship v2	REL60390 - Norfolk Maritime Solutions (P&S Maritime Solutions) - TEST SUPPLIER - Indirect Offsite	Enrollment Preparation	

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1. Enrollment Preparation – Step 1

- Review the information within the **Header** section on pending tasks.
- Review and complete questions in the **Business Usage Questions** tab.
- Click Save.

The screenshot displays the 'Supplier Relationship Manage' interface. On the left is a dark sidebar with navigation options: Header, Business Usage Questions (selected), Locations, Questionnaires, Documents/Certs, and Workflow. The main content area has a top bar with 'Save', 'Forward', and 'Confirm' buttons. Below this is a light blue informational box stating: 'Fields marked by an asterisk * are mandatory' and 'Expected date format: M/d/yyyy'. The 'Supplier Relationship' section contains two error messages: '- Supplier Relationship must have a 'Purchasing' Supplier Location selected. Please add a Purchasing Location in the Locations tab.' and '- Supplier Relationship must have a 'Pay' Supplier Location selected. Please add a Pay Location in the Locations tab and 'Save' the form.'. Below the errors is a 'Questions' section with four mandatory questions, each with a dropdown menu:

- Will/do you supply products that contain electronics? *
- Will your company receive, transmit, store or have access to BAE Systems data in a cloud environment? *
- Are you coming on site to provide a Service AND Is the purpose of your service a) recurring; b) for multiple instances or events; and/c
- Will the service provided involve work or activities at a BAE Systems facility where there is potential to present harm to any person

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1. Enrollment Preparation – Step 2

- A. Access the **Locations** tab.
- B. Assign a location to each category based on its intended purpose. If a single location supports multiple purposes, assign that same location to each applicable category.
- C. Click **Save**

The **RFQ Only Location may be assigned however, RFQ Only can be the sole purpose for that location. Other purposes cannot be used in conjunction with the RFQ Only assignment.

- D. Click the green **Confirm** button to move to the next step within the Workflow.

Supplier Relationship Manage

Save | Forward Confirm

ⓘ Fields marked by an asterisk * are mandatory
📅 Expected date format: M/d/yyyy

Supplier Relationship

Locations

+ Add Supplier Location

Purchasing Locations

1234 Broadway Ave - 1234 Broadway Ave 28277 Charlotte × ⌵

Pay Locations

1234 Broadway Ave - 1234 Broadway Ave 28277 Charlotte × ⌵

Manufacturing

⌵

No-Site Use

⌵

RFQ Only Locations

⌵


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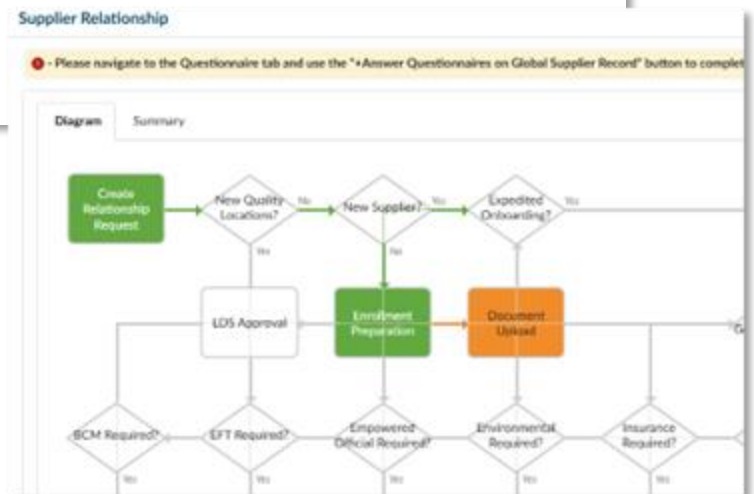
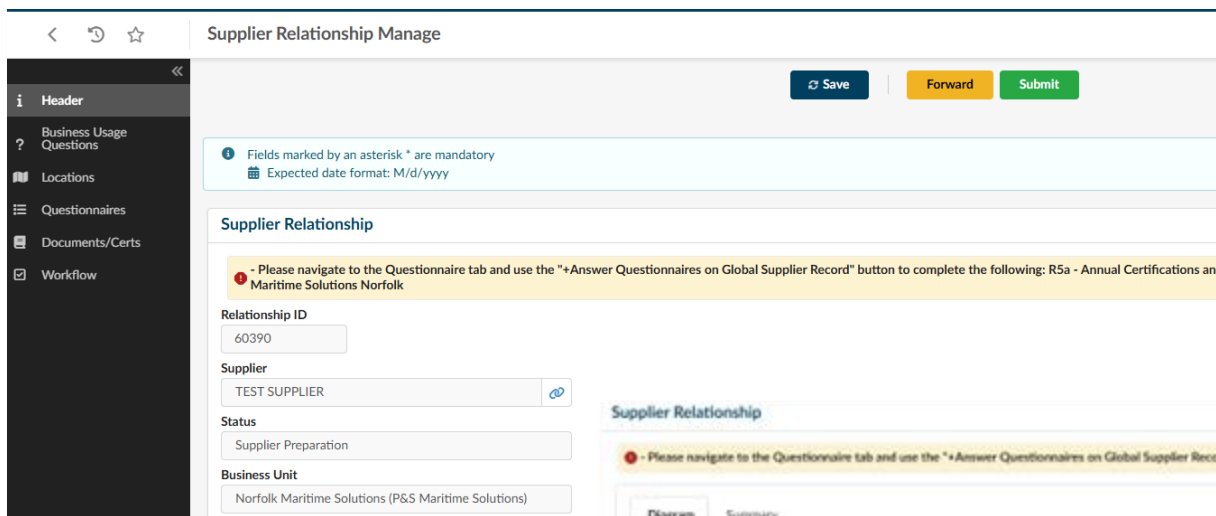
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2. Document Upload

A. If you have returned to the Home page, Click the **pencil** icon to start the validation process OR continue with the onboarding process from the conclusion of the Enrollment Preparation process.

Validations

Process	Object	Action
 Supplier Relationship v2	REL60390 - Norfolk Maritime Solutions (P&S Maritime Solutions) - TEST SUPPLIER - Indirect Offsite	Document Upload



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2. Document Upload

- B. Navigate to the **Questionnaires** section to complete any outstanding questionnaires. Only complete the questionnaires identified in the **Blocking Alert** and/or in the **Required Questionnaires for Supplier Relationship** box.

The screenshot shows the Ivalua SIM interface. On the left is a dark sidebar with navigation options: Header, Business Usage Questions, Locations, Questionnaires (highlighted), Documents/Certs, and Workflow. The main content area has a top bar with 'Save', 'Forward', and 'Submit' buttons. Below this is a light blue banner with a mandatory field notice: 'Fields marked by an asterisk * are mandatory' and 'Expected date format: M/d/yyyy'. The main section is titled 'Supplier Relationship' and contains a yellow warning box: '- Please navigate to the Questionnaire tab and use the "+Answer Questionnaires on Global Supplier Record" button to complete the following: R5a - Annual Certifications and Representations, R1a - Annual Business Size, F2 - Citibank JVB945 - Maritime Solutions Norfolk'. Below the warning is a 'Questionnaires' section with a sub-header 'Required Questionnaires for Supplier Relationship' and a list: 'F2 - Citibank JVB945 - Maritime Solutions Norfolk, G1 - Supplier Fit for Business Questions - Finance and Responsibility, G2 - General Capabilities, R1a - Annual Business Size, R5a - Annual Certifications and Representations'.

- C. Click the **+Answer Questionnaires on Global Supplier Record** button

This is a close-up of the 'Questionnaires' section from the screenshot. It shows the 'Required Questionnaires for Supplier Relationship' list: 'F2 - Citibank JVB945 - Maritime Solutions Norfolk, G1 - Supplier Fit for Business Questions - Finance and Responsibility, G2 - General Capabilities, R1a - Annual Business Size, R5a - Annual Certifications and Representations'. Below this list is a grey button with the text '+ Answer Questionnaires on Global Supplier Record'. A green arrow points to this button. Below the button is another section header 'Questionnaire'.

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2. Document Upload

- D. Click the **Answer Questionnaire** tab to access the dropdown menu/list.
- E. Only complete the questionnaires listed in the **Alerts** panel.

The screenshot shows the SIM interface with the 'Answer Questionnaire' dropdown menu open. The dropdown menu lists the following questionnaires:

- E1 - Hazardous Waste Certification
- E2 - Supplier Government Property & Inventory Certification
- E3 - Safety Verification Form
- E4 - TSCA
- E5 - Environmental Survey
- E6 - OSHA Affidavit
- E7 - Annual Safety Performance
- F1 - Certificate of Accounting System Adequacy
- F2 - Citibank - Maritime Solutions

The 'Alerts' panel on the right contains the following message:

Please upload the following questionnaires for BAE Supplier Relationship onboarding: F2 - Citibank JVB945 - Maritime Solutions Norfolk, R1a - Annual Business Size, R5a - Annual Certifications and Representations

- F. If you have been requested to complete an additional questionnaire, select it from the list and complete it.

The screenshot shows the SIM interface with the 'Questionnaires' table and the 'Answer Questionnaire' dropdown menu open. The 'Questionnaires' table has the following data:

Campaign	Status	Created Date	Submitted Date
G1 - Supplier Fit for Business Questions - Finance and Responsibility	Completed	12/18/2025	12/18/2025 5:43:4
G2 - General Capabilities	Completed	12/18/2025	12/18/2025 5:45:1
F2b - Citibank - Maritime Solutions Norfolk	In progress	12/19/2025	
R1a - Annual Business Size	In progress	12/19/2025	
R5a - Annual Certifications & Representations	In progress	12/19/2025	

The 'Answer Questionnaire' dropdown menu lists the following questionnaires:

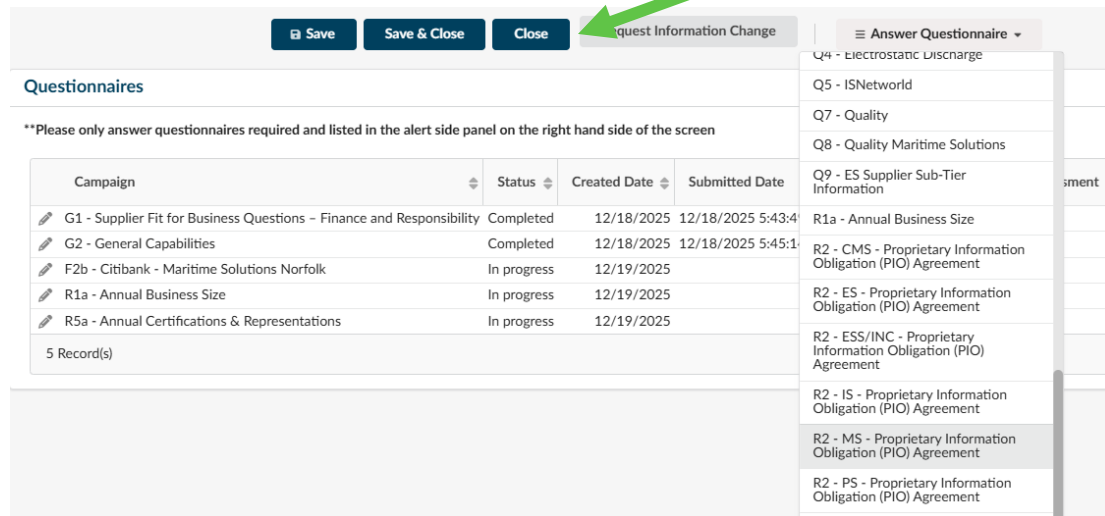
- Q4 - Electrostatic Discharge
- Q5 - ISNetwork
- Q7 - Quality
- Q8 - Quality Maritime Solutions
- Q9 - ES Supplier Sub-Tier Information
- R1a - Annual Business Size
- R2 - CMS - Proprietary Information Obligation (PIO) Agreement
- R2 - ES - Proprietary Information Obligation (PIO) Agreement
- R2 - ESS/INC - Proprietary Information Obligation (PIO) Agreement
- R2 - IS - Proprietary Information Obligation (PIO) Agreement
- R2 - MS - Proprietary Information Obligation (PIO) Agreement
- R2 - PS - Proprietary Information Obligation (PIO) Agreement

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2. Document Upload

G. Click the **Close** button once all the questionnaires are completed.



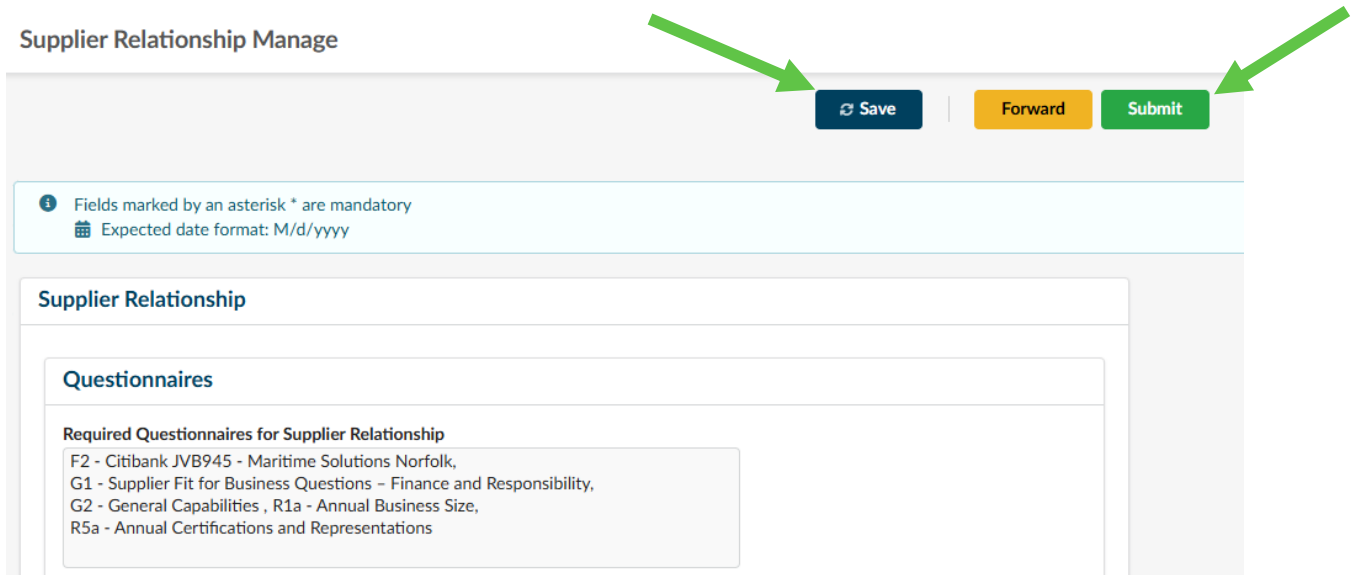
The screenshot shows the SIM interface with a top navigation bar containing buttons for Save, Save & Close, and Close. A green arrow points to the Close button. Below the navigation bar is a section titled "Questionnaires" with a note: "**Please only answer questionnaires required and listed in the alert side panel on the right hand side of the screen". A table lists the questionnaires with columns for Campaign, Status, Created Date, and Submitted Date. A dropdown menu on the right lists various questionnaire types such as Q4 - Electrostatic Discharge, Q5 - ISNetwork, Q7 - Quality, Q8 - Quality Maritime Solutions, Q9 - ES Supplier Sub-Tier Information, R1a - Annual Business Size, R2 - CMS - Proprietary Information Obligation (PIO) Agreement, R2 - ES - Proprietary Information Obligation (PIO) Agreement, R2 - ESS/INC - Proprietary Information Obligation (PIO) Agreement, R2 - IS - Proprietary Information Obligation (PIO) Agreement, R2 - MS - Proprietary Information Obligation (PIO) Agreement, and R2 - PS - Proprietary Information Obligation (PIO) Agreement.

Campaign	Status	Created Date	Submitted Date
G1 - Supplier Fit for Business Questions – Finance and Responsibility	Completed	12/18/2025	12/18/2025 5:43:4
G2 - General Capabilities	Completed	12/18/2025	12/18/2025 5:45:1
F2b - Citibank - Maritime Solutions Norfolk	In progress	12/19/2025	
R1a - Annual Business Size	In progress	12/19/2025	
R5a - Annual Certifications & Representations	In progress	12/19/2025	

H. Click the **Save** button. Please note any incomplete items will remain in the Alerts.

I. Once all items have been completed, click the **Submit** button to submit the questionnaires for review.

** Please note that the record cannot progress to the next step in the workflow until the Submit button is selected.



The screenshot shows the "Supplier Relationship Manage" interface. At the top, there are three buttons: Save, Forward, and Submit. Green arrows point to the Save and Submit buttons. Below the buttons is a message: "Fields marked by an asterisk * are mandatory" and "Expected date format: M/d/yyyy". The main content area is titled "Supplier Relationship" and contains a section for "Questionnaires" with a list of required questionnaires for the supplier relationship: F2 - Citibank JVB945 - Maritime Solutions Norfolk, G1 - Supplier Fit for Business Questions – Finance and Responsibility, G2 - General Capabilities, R1a - Annual Business Size, and R5a - Annual Certifications and Representations.

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Additional Resources

If additional assistance is required, please use one of these options below to request assistance:

- Review the Ivalua User Guides: Click the **question mark** at the top right of the page
- Start a new conversation within the **Ivalua Conversations** panel
- Email the Supply Chain Digital Applications team at ebusiness@baesystems.us

