

Supplier Information Management (SIM)

Ivalua Quick Reference Guide

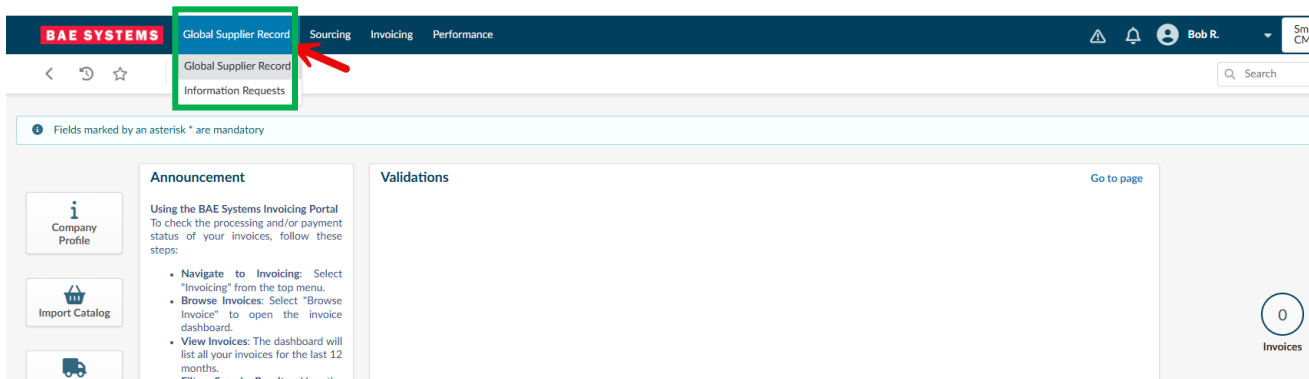
This Quick Reference Guide provides an overview of the Supplier Information Management portal within the Ivalua platform. It covers the following topics:

- Supplier Record Components
- Alerts and Warnings
- System Workflow
- Questionnaires and Documentation
- Messages, Notifications, and the Chat feature

Note: A detailed **Ivalua Guide** is also available within the platform and serves as a supplemental, step-by-step walkthrough of the full registration process. It serves as a supplement to this reference guide for users who prefer on-screen guidance.

Ivalua Home Page – Opening Page

1. To access your company information, click the **Global Supplier Record** module tab across the top and click **Global Supplier Record**.



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Ivalua Home Page – Opening Page

2. To switch between the **Global Supplier Record** and the **Global Supplier Location(s)**, click the name box dropdown at the top right. Select from the list of location(s) or the Global Supplier record (name).

Global Supplier Record

On the Global Supplier Record page, the user can view the **Global Supplier Record**:

1. Click **Company Information**. This enables the user to view the Global Supplier Record, which displays company information for the global supplier.

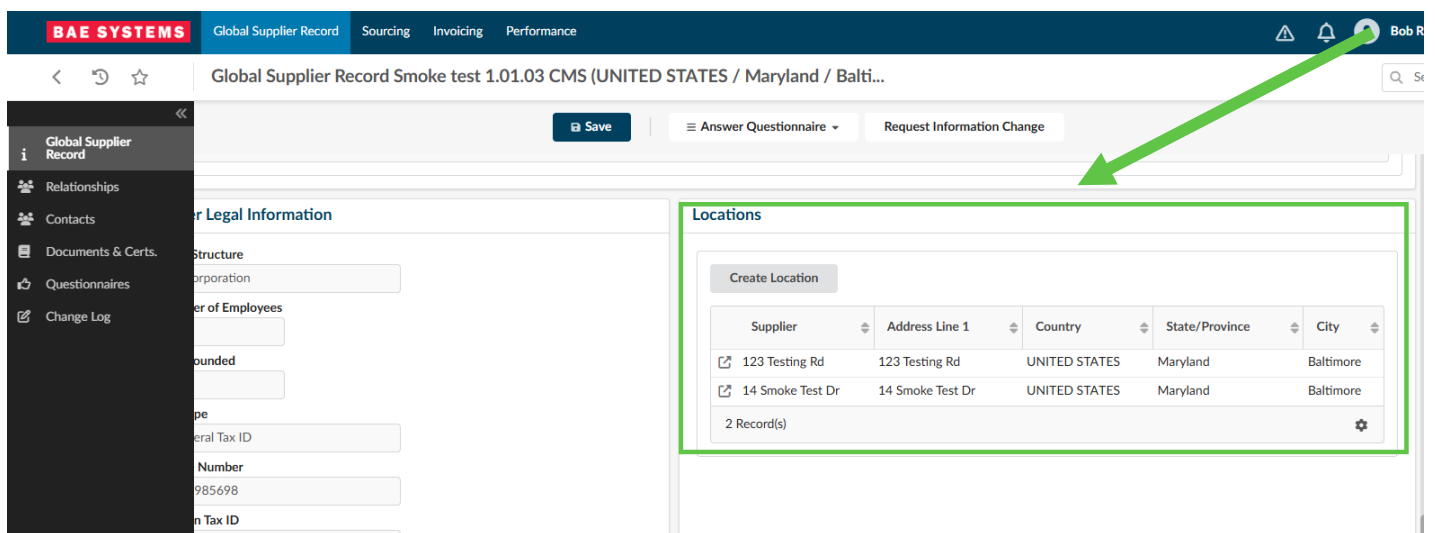
2. Use the **black menu bar on the left** to navigate through the different modules of the Global Supplier Record.

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Global Supplier Record

The **Locations** area can be found by scrolling to the bottom of the Global Supplier Record page. This section lists all locations associated with a supplier, allowing for multiple locations to be linked to a single supplier.

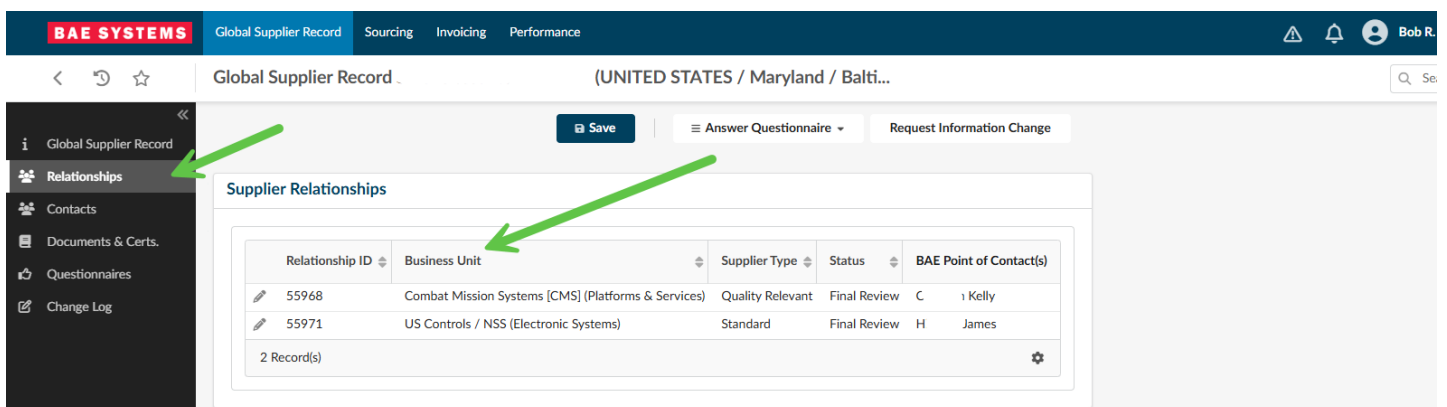


The screenshot shows the 'Global Supplier Record' page for 'Smoke test 1.01.03 CMS (UNITED STATES / Maryland / Balti...'. The 'Locations' module is highlighted with a green box. A green arrow points from the top right of the page towards the 'Locations' section. The 'Locations' table contains the following data:

Supplier	Address Line 1	Country	State/Province	City
123 Testing Rd	123 Testing Rd	UNITED STATES	Maryland	Baltimore
14 Smoke Test Dr	14 Smoke Test Dr	UNITED STATES	Maryland	Baltimore

Global Supplier Record: Relationships Module

All supplier relationships are listed in this module. Please note a single supplier may have multiple relationships with various BAE Systems business units. Click the **pencil icon** to view and edit information for a specific relationship.



The screenshot shows the 'Global Supplier Record' page for 'Smoke test 1.01.03 CMS (UNITED STATES / Maryland / Balti...'. The 'Supplier Relationships' module is highlighted with a green box. A green arrow points from the top right of the page towards the 'Supplier Relationships' section. Another green arrow points from the 'Relationships' menu item in the left sidebar to the 'Supplier Relationships' table. The 'Supplier Relationships' table contains the following data:

Relationship ID	Business Unit	Supplier Type	Status	BAE Point of Contact(s)
55968	Combat Mission Systems [CMS] (Platforms & Services)	Quality Relevant	Final Review	C Kelly
55971	US Controls / NSS (Electronic Systems)	Standard	Final Review	H James

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Alerts & Warnings

There are two primary alert types display in the system: Blocking alerts and Warnings.

1. **Blocking Alerts:** Prevent the user from progressing forward in the workflow until the blocking alert is addressed and resolved. Represented by a **red stop sign icon**.
2. **Warnings:** Indicate potential issues, such as missing data or a document is under review. Represented by an **orange triangle icon**.

Alerts

A Primary NAICS code + NAICS Code Classification entry is required for the each supplier. Please add a NAICS Code classification for 112990 using the '+Add NAICS Code Classification' button

Please navigate to the Questionnaires tab and answer the following questionnaires: Due Diligence Questionnaire, Financial Viability, General Capabilities (FRM381), Supplier Principles

A Supplier Location for Purchasing and Payment is required. Please create and submit Supplier Location(s) using the 'Create Location' button in the Company Profile tab.

W9 Upload is required in the Documents tab

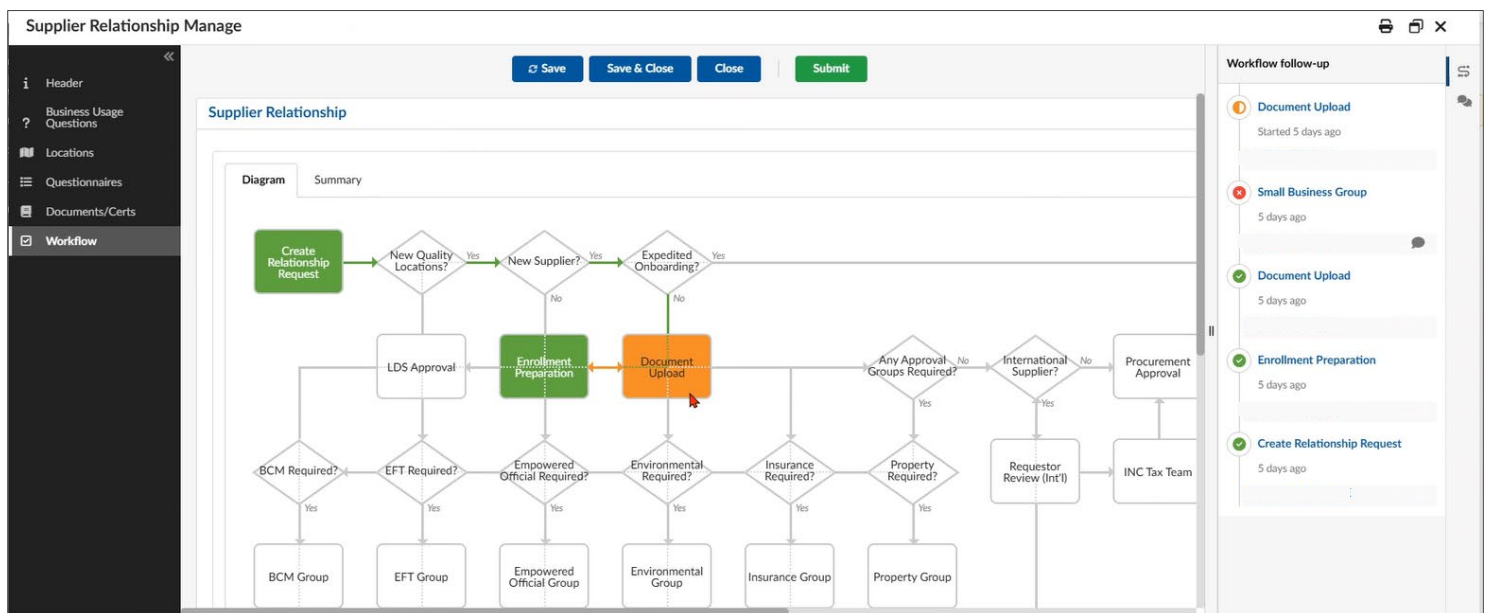
Alerts

Change Request is currently in progress. Only one Change Request can be processed at a time.

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Global Supplier Record Workflow



This close-up shows the 'Workflow follow-up' list. It includes entries for 'Small Business Group', 'Colline STEVENS' (with a comment bubble), 'Document Upload', 'Enrollment Preparation', and 'Create Relationship Request'. A green arrow points to the comment bubble next to 'Colline STEVENS'.

Relationship Workflow:

- **Green** – a step already completed
- **Orange** – a step you are on
- **White** – process flow signposts

The workflow follow-up (example shown to the left) displays the names of individuals who completed each workflow step.

Note the **comment bubble** next to approver's name – this indicates comments have been made (e.g., by the Assessor). Click on the comment bubble to view them.

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Questionnaires & Documentation

The questionnaires can be viewed at the Global Supplier Record level

The screenshot shows the BAE SYSTEMS Global Supplier Record interface. The top navigation bar includes 'BAE SYSTEMS', 'Global Supplier Record', 'Sourcing', 'Invoicing', and 'Performance'. The main header displays 'Company Info Tim and Traci Training Enterprises (UNITED STATES / Missouri / ST ...)' with a 'Save' button and an 'Answer Questionnaire' dropdown. A left sidebar menu is visible with options: 'Company Information', 'Relationships', 'Contacts', 'Documents & Certs.', 'Questionnaires', and 'Change Log'. The 'Questionnaires' section is active, displaying a table with the following data:

Campaign	Progress	Status	Date	Supplier Location for Quality Assessment	Expiration Date
Due Diligence Questionnaire	100%	Completed	7/31/2025		7/30/2026
General Capabilities (FRM381)	100%	Completed	7/31/2025		
Supplier Principles	100%	Completed	7/31/2025		
Financial Viability	100%	Completed	7/31/2025		

Questionnaires are visible at both the Global Supplier Record and at the Relationship level.

Please note: The icons in the Global Supplier Relationship menu are different than the icons shown in the Relationship menu. The list of questionnaires that are required for this relationship are listed in the Required Questionnaires box on that Relationship.

The screenshot shows the BAE SYSTEMS Supplier Relationship Manage interface. The top navigation bar includes 'BAE SYSTEMS', 'Global Supplier Record', 'Sourcing', 'Invoicing', and 'Performance'. The main header displays 'Company Info Tim and Traci Training Enterprises (UNITED STATES / Missouri / ST ...)' with 'Save', 'Save & Close', and 'Close' buttons. A left sidebar menu is visible with options: 'Company Information', 'Relationships', 'Contacts', 'Documents & Certs.', 'Questionnaires', and 'Change Log'. The 'Questionnaires' section is active, displaying a table with the following data:

Campaign	Progress	Status	Date
Due Diligence Questionnaire	100%	Completed	7/31/2025
General Capabilities (FRM381)	100%	Completed	7/31/2025
Supplier Principles	100%	Completed	7/31/2025
Financial Viability	100%	Completed	7/31/2025
Annual Business Size (FRM419)	100%	Completed	7/31/2025
Citibank JVB945 - ESS	100%	Completed	7/31/2025

Completed questionnaires can be viewed on this page.

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Documentation at the Global Supplier Record Level

Documents & Certs can be viewed on the Global Supplier Record. This includes W9 forms, or any other tax information.

The screenshot shows the BAE Systems Global Supplier Record interface. The top navigation bar includes 'BAE SYSTEMS', 'Global Supplier Record', 'Sourcing', 'Invoicing', and 'Performance'. The main header displays 'Global Supplier Record' and '(UNITED STATES / Maryland / Balti...'. The left sidebar contains a menu with items: 'Global Supplier Record', 'Relationships', 'Contacts', 'Documents & Certs.', 'Questionnaires', and 'Change Log'. A green arrow points to 'Documents & Certs.'. The main content area features a 'Save' button, 'Answer Questionnaire', and 'Request Information Change' options. Below this is a search section with 'Keyword Search', 'Status', and checkboxes for 'Archived Documents' and 'Missing Required Documents'. A table titled 'Supplier Documents' is visible, with columns for 'Att.', 'Document Type', 'Document Name', 'Begin Date', 'Expiration Date', 'Owner', and 'Status'. The table contains two records: 'ISO 9001 :2015' and 'Form W9'.

Documentation at the Relationship Level

Supplier Documents uploaded for each supplier location, such as a Certificate of Insurance (COI), are uploaded under Documents/Certs.

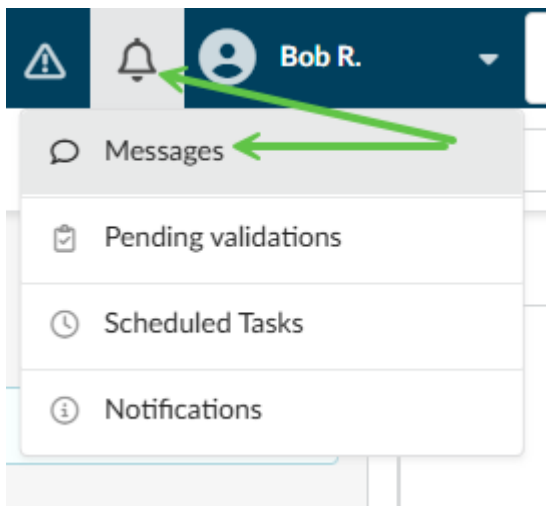
The screenshot shows the BAE Systems Supplier Relationship Manage interface. The top navigation bar includes 'BAE SYSTEMS', 'Global Supplier Record', 'Sourcing', 'Invoicing', and 'Performance'. The main header displays 'Global Supplier Record Smoke test 1.01.03 CMS (UNITED STATES / Maryland / Balti...'. The left sidebar contains a menu with items: 'Global Supplier Record', 'Relationships', 'Contacts', 'Documents & Certs.', 'Questionnaires', and 'Change Log'. A green arrow points from 'Documents & Certs.' in the sidebar to the 'Documents/Certs' section in the main content area. The main content area features a 'Save', 'Save & Close', and 'Close' button. Below this is a search section with 'Keyword Search', 'State to date', and checkboxes for 'Archived Documents' and 'Missing Required Documents'. A table titled 'Supplier Documents' is visible, with columns for 'Att.', 'Document Type', 'Document Name', 'Begin Date', 'Expiration Date', 'Owner', and 'Status'. The table contains two records: 'ISO 9001 :2015' and 'Form W9'.

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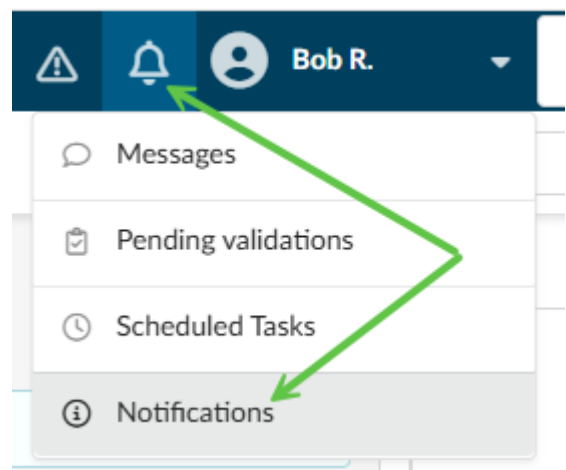
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Messages, Notifications, & Validations

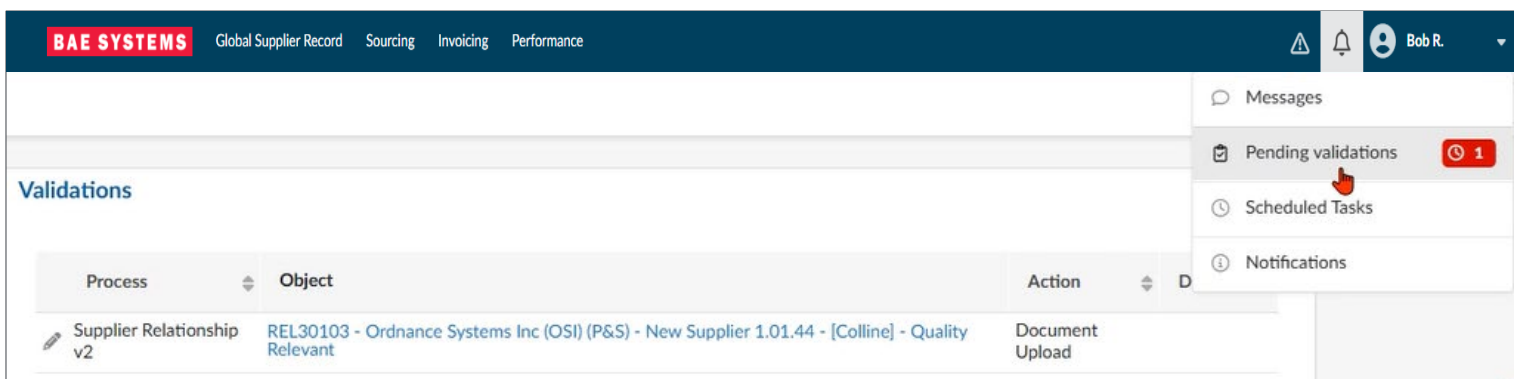
Messages can be accessed by clicking on the **Bell icon** at the top of the page and then selecting **“Messages”**. This feature provides a centralized location for viewing messages.



The **Notifications** feature provides a centralized location for notifications, such as task reminders, information updates, and other relevant notifications.



Validations (To-Do list). Access validations in two ways: (1) Click “Pending validations” under the Bell Icon. Or (2) view the list on the Home Page.



A screenshot of the Ivalua system interface. The top navigation bar includes the BAE SYSTEMS logo and menu items: Global Supplier Record, Sourcing, Invoicing, Performance. The user is identified as 'Bob R.'. The navigation menu is open, showing options: Messages, Pending validations (with a red notification badge), Scheduled Tasks, and Notifications. The 'Validations' page is displayed, showing a table with columns: Process, Object, and Action. The table contains one row: Supplier Relationship v2, REL30103 - Ordnance Systems Inc (OSI) (P&S) - New Supplier 1.01.44 - [Colline] - Quality Relevant, Document Upload.

Process	Object	Action
Supplier Relationship v2	REL30103 - Ordnance Systems Inc (OSI) (P&S) - New Supplier 1.01.44 - [Colline] - Quality Relevant	Document Upload

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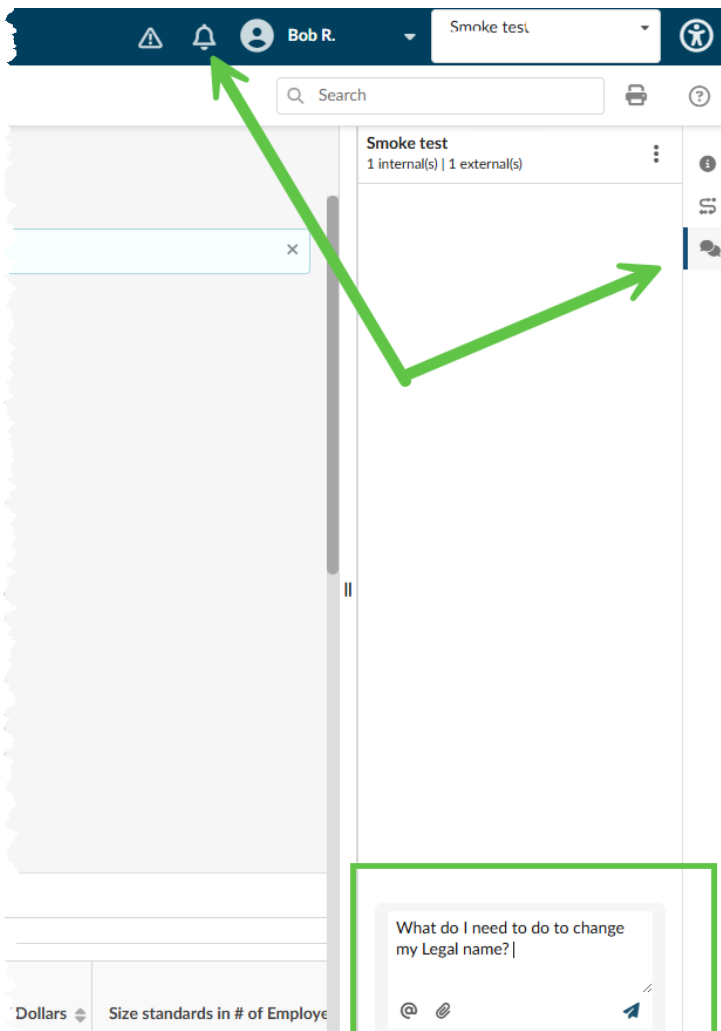
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Ivalua Chat Feature



The **Chat** feature, represented by a **double bubble icon**, enables conversations between BAE Systems procurement professionals and their supplier contacts. Access Chat by clicking the double bubble icon or by clicking the **Bell icon** and navigation to the **Chat** section.

If working in another module, use the Bell icon to access messages without switching modules. Please note, the double bubble feature is not accessible from the Home Page.



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Additional Resources

If additional assistance is required, please visit the Ivalua Resource Hub or send an email to ebusiness@baesystems.us for assistance. Be sure to indicate that you are requesting training and additional resources.