Ivalua Supplier Onboarding Guide

Prepared for BAE Systems, Inc.

Welcome to our Ivalua onboarding guide!

In 2025, BAE Systems Inc. started transitioning suppliers to our new Source to Pay platform, Ivalua. We understand that the onboarding process can be a bit overwhelming, so we've created this step-by-step guide to help you navigate the process with ease. Use the table of contents to jump to the section relevant to your onboarding status. Simply click on the corresponding header to access the information you need.

Updated February 2026

Not Export Controlled per GT Standard 5

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First Time Logging In

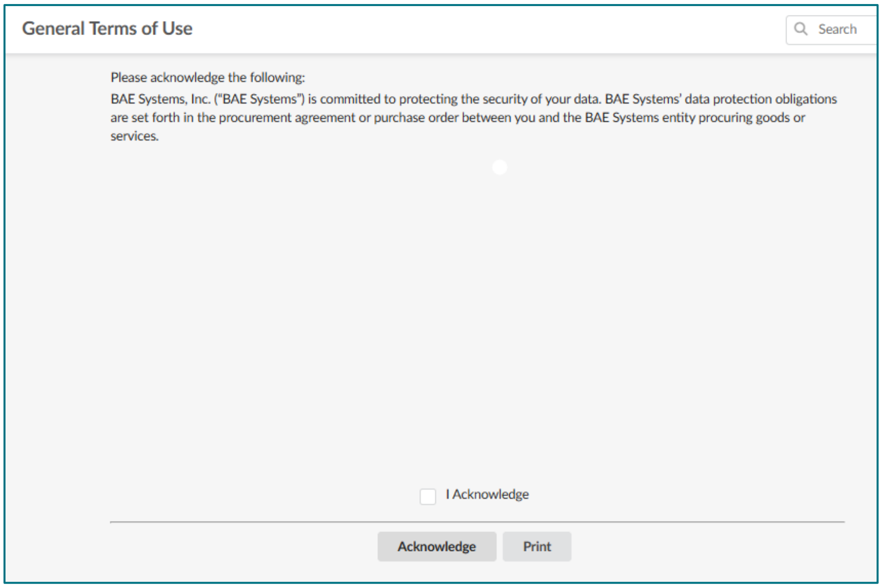
If you haven't logged into the system yet, please check your inbox for an **Invitation to Login** email from **ivalua.noreply@baesystems.us**. These emails, which contain your login credentials, are sent weekly for supplier contacts who have not yet logged into Ivalua.

> Hello [Username],
>
> You have been invited to complete the registration process on our Ivalua Source-to-Pay Platform to facilitate potential business opportunities with BAE Systems Inc. Below are the required steps to complete the registration process. Please complete the registration at your earliest convenience to avoid impacting your status as a supplier with BAE Systems, Inc.
>
> **Login Credentials:**
> Your login credentials have been generated as follows:
> Login: [Login ID]
>
> **Registration Steps:**
> 1. Set your password on this page : Set password.
> 2. Access to the application login to continue the onboarding process : Login.
> 3. If you have issues setting your password, please use the "lost my password" option on the Ivalua home page
>
> **Required Information:**
> Please have the following information available prior to logging in:
> • Company Details (Legal Address, Tax ID number)
> • Purchasing and Payment Address
> • Primary Contact Details (Name, Telephone, Email address)
> • Domestic Tax Form (W9)
> • General Capabilities (Products and/or services that you provide)
> Depending on the BAE Systems business unit that is onboarding you, there may be additional sets of information as well.
>
> **Assistance:**
> A training guide is available in the question mark Help section in Ivalua to assist you with the registration process. If you need further assistance, please

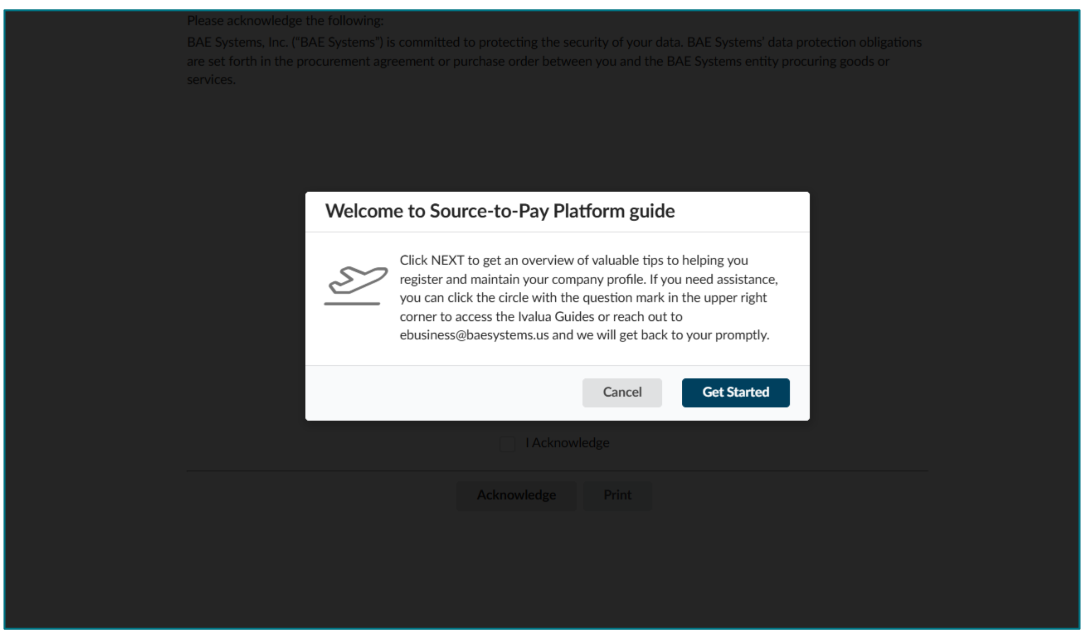
Please note the following:

- Your password is temporary and expires in 7 days, so please ensure you **use the most recent email notification** when attempting to log in for the first time.
- Your login username is typically your email address. However, for some contacts who were migrated from the HICX platform, **your username may not be your exact email address** due to system migration discrepancies. If you notice a variance (typically a login that ends in _0, _1, etc.) and would like to request a change, please contact your BAE Systems representative for assistance.

When you first log in, you will be prompted to acknowledge the terms of use for Ivalua. These govern your use of the Ivalua platform only and are separate and independent to terms set forth in your procurement agreements or purchase orders.



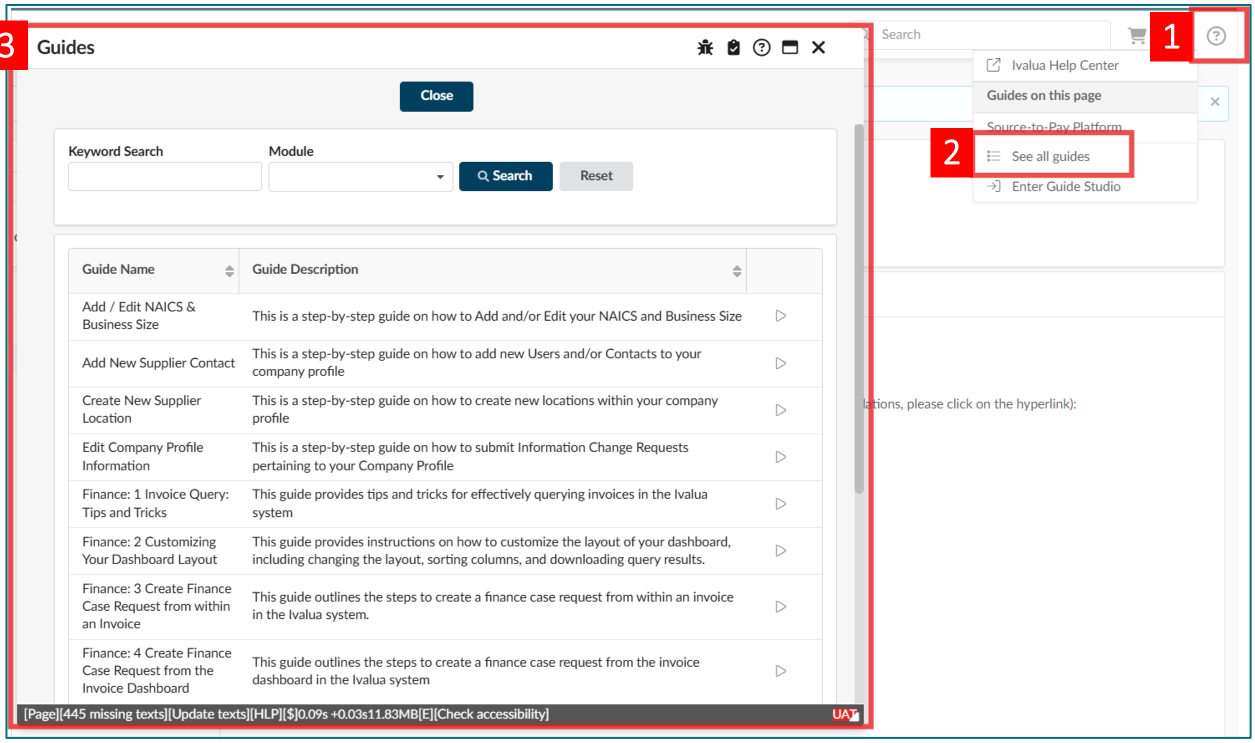
As you acknowledge the terms of use, you may also see a pop-up to launch the Source to Pay Platform guide. This is one of the interactive Quick Reference Guides that are built into the system to provide step-by-step walkthroughs of various features in Ivalua.



Accessing User Guides

For now, we will skip this guide, but you can access these later using the following steps:

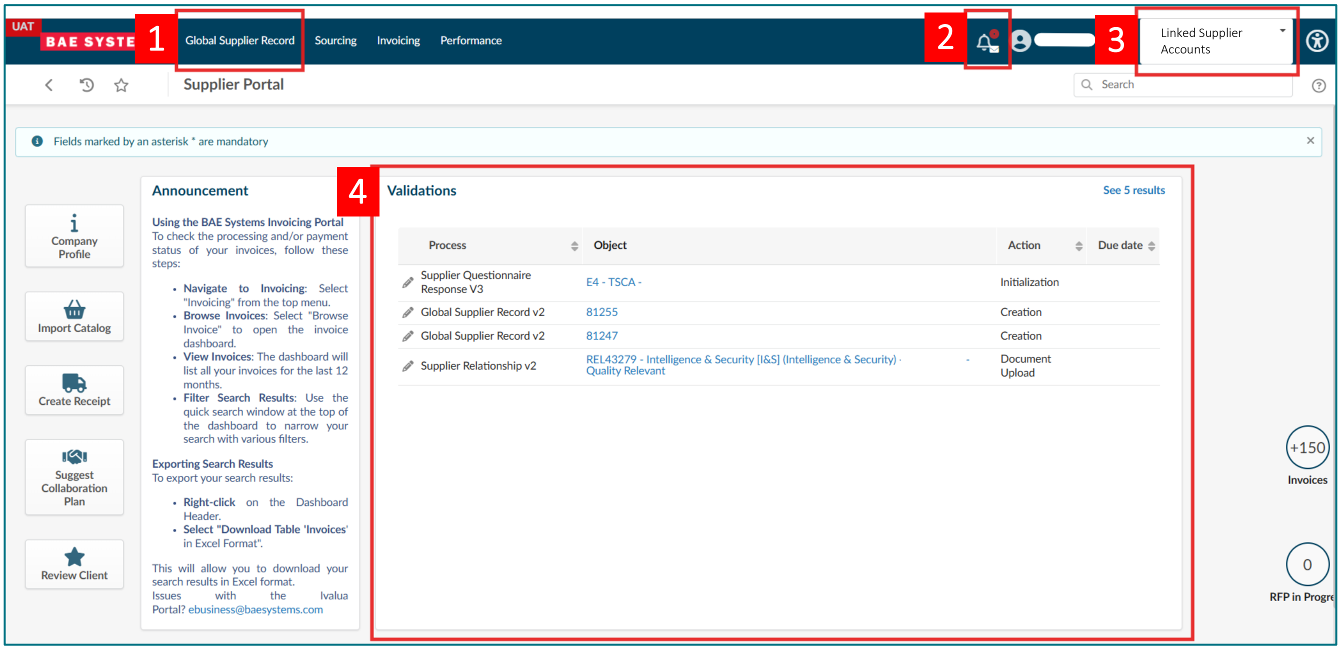
1. Click help icon (question mark) at the top right of the screen
2. Click the menu option to "See all guides"
3. Select the desired guide from the popup window and click the play icon



Supplier Portal Homepage

The Ivalua homepage serves as your central hub for managing your business with BAE Systems. For onboarding as a new supplier to Ivalua, we will focus on the following sections:

1. Global Supplier Record – contains the company profile, Relationships, and supplier information management
2. Notifications – contains messages, pending validations, scheduled tasks, and email notifications
3. Linked Supplier Accounts – dropdown to navigate between your accounts, if applicable
4. Validations – contains tasks that have been assigned to you



We will dive into details in these sections as we navigate the onboarding process. For guidance on other aspects of the homepage and system navigation, please refer to the Quick User guide called **Source to Pay Platform guide** (refer to the section on Accessing User Guides for more details).

Onboarding Steps

This section outlines the required steps to complete your portion of the onboarding process. If you've already started onboarding, refer to the relevant sections below for guidance on completing any remaining actions. If you were not a previous HICX user, please follow the **Step 1 – Registration: Create Global Supplier Record** guide in Ivalua to complete your profile. If you run into any issues, please reach out to your BAE Systems representative for assistance.

Step 1 - Verify Global Supplier Record Data

Your Global Supplier Record contains your main supplier profile, which migrated from our HICX platform if you were previously set up there. In this step, you will review your profile information and make updates as required to ensure accuracy.

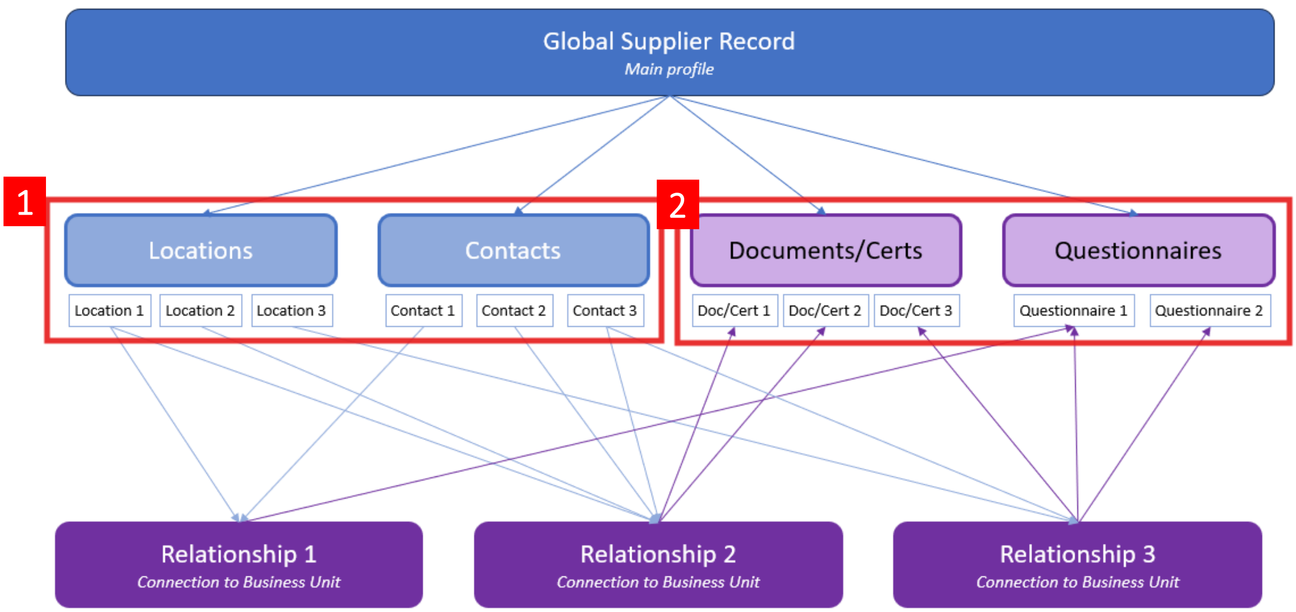
Understanding the Global Supplier Record and Relationships

In Ivalua, there are two main layers of data management: the **Global Supplier Record** and the **Relationship**. This hierarchical structure is designed to separate your core static data from your operational or business unit-specific data.

- The **Global Supplier Record** is the master repository for your core information, such as your legal entity name, address, and tax ID. This high-level data serves as the foundations for all your engagements with BAE Systems.
- A **Relationship** represents as specific engagement with a business unit. You may have Relationships with multiple BAE Systems business units, and each one will be tailored specifically for the business unit.

The image below provides a visual depiction of this hierarchy. It is important to note the following:

1. **Locations** and **Contacts** will be updated on the **Global Supplier Record.** The data will be pulled into the Relationships when they are set up.
2. **Documents**, **Certifications**, and **Questionnaires** requirements are defined at the **Relationship** level, but the files will be stored in the Global Supplier Record so they can be accessed by all relationships as needed.

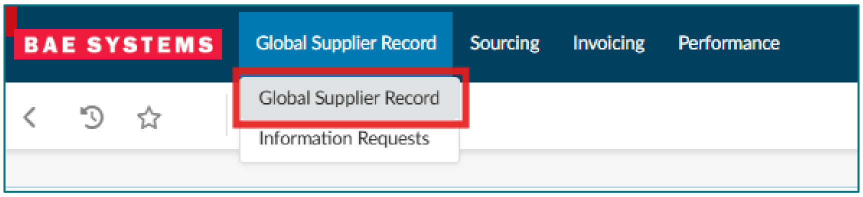


For this step, we will be focusing on updating the Locations and Contacts on the Global Supplier Record.

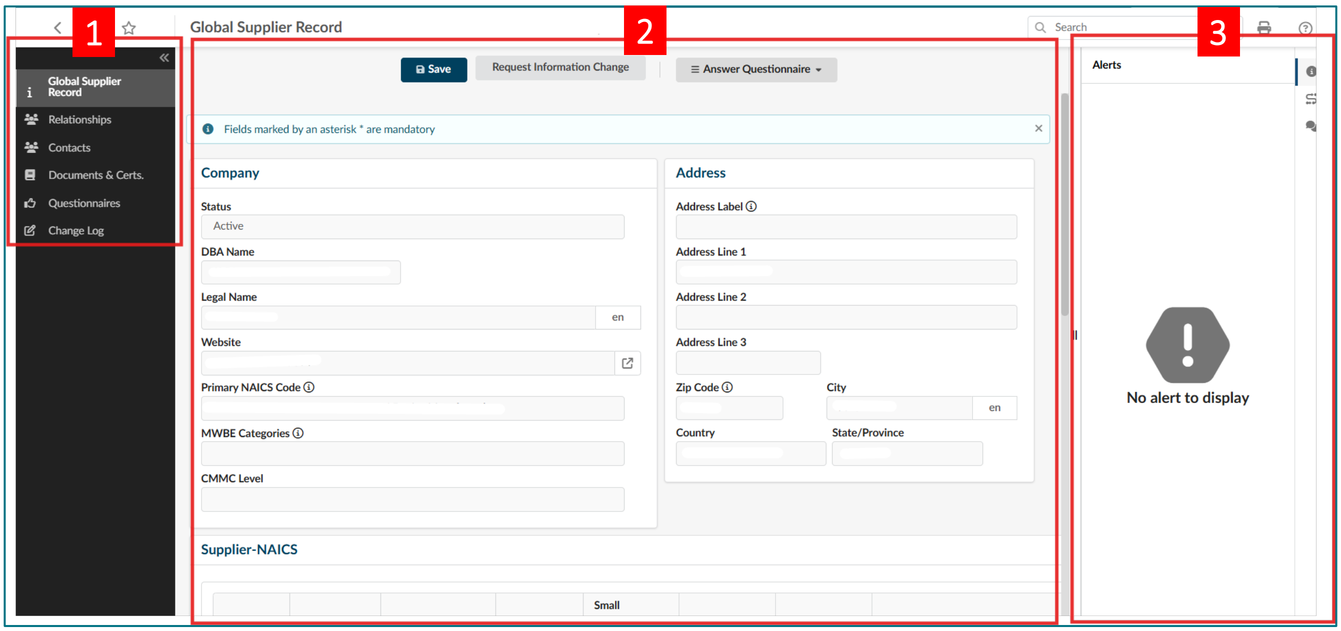
Please hold off on adding documents, certifications, and questionnaires at this step. You will receive your list of required attachments after confirming your Relationship in Step 2. Until then, no action is required on the Documents & Certs. and Questionnaires tabs.

Accessing your Record

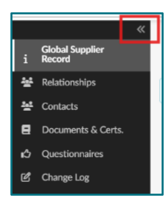
To access your record, click on the **Global Supplier Record** button in the header bar, and select the **Global Supplier Record** option in the dropdown menu.



First, let's get familiarized with this screen. It is divided into the following three sections:

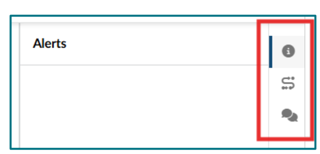


1. Main Menu – This section contains the main menu options for navigating your supplier record. You can expand and collapse this area using the arrow buttons.

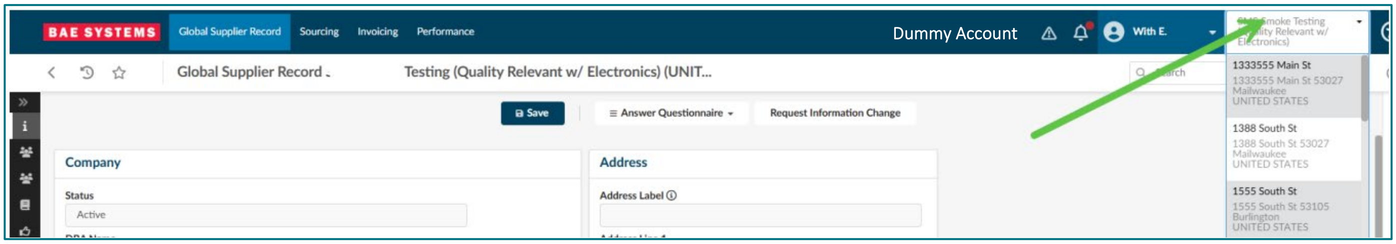


2. Record information – This section displays the information for the selected menu option.

3. Right-hand Menu – This section contains information on alerts, the system workflow, and conversations with BAE Systems. Use the icons to navigate between the three options.

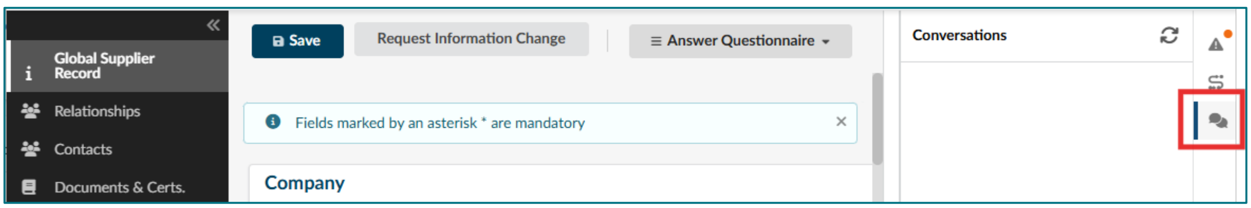


If you have multiple accounts and your menu options appear different from the ones shown above, you're likely viewing a Location record instead of the Global Supplier Record. To switch views, go to your Accounts List and select the option that corresponds to your company name.

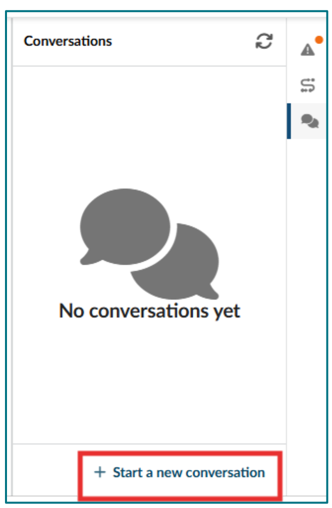


Communicating with BAE Systems

On the right-hand menu of a record, you will see a conversation bubble icon that allows you to communicate with your BAE Systems representatives.

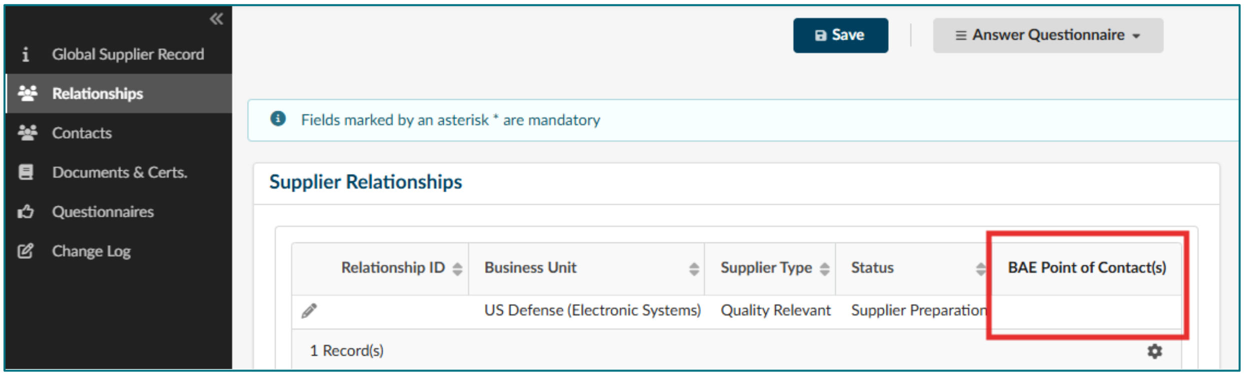


Selecting that icon will open the **Conversations** screen. If it is your first time starting a conversation on the selected record, you can click the **Start a new conversation** link to begin a new chat.

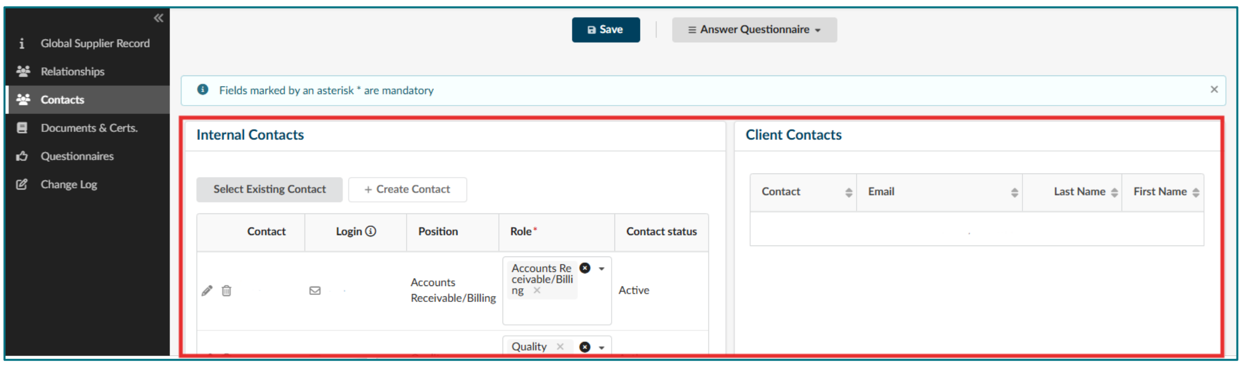


This will initiate a conversation with the BAE Systems Point of Contact(s) for your Relationship(s) and the contacts listed on your Contacts page.

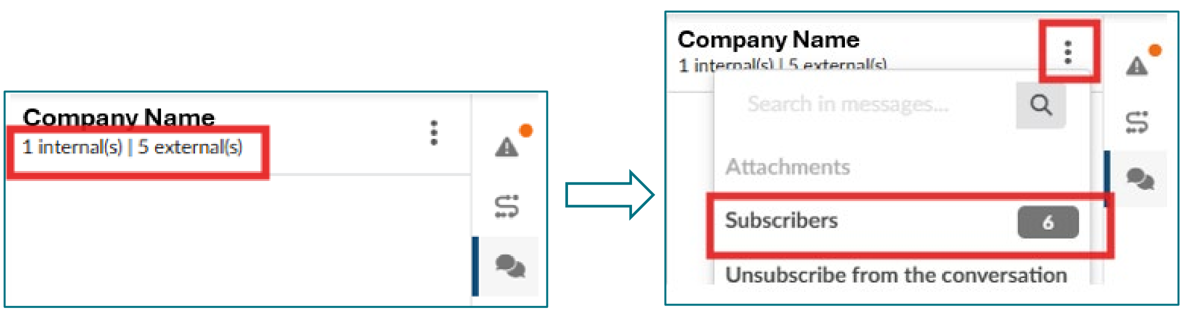
- To view your BAE Point of Contact(s), navigate to the **Relationships** screen of your Global Supplier Record



- To view your contacts, navigate to the **Contacts** screen of your Global Supplier Record

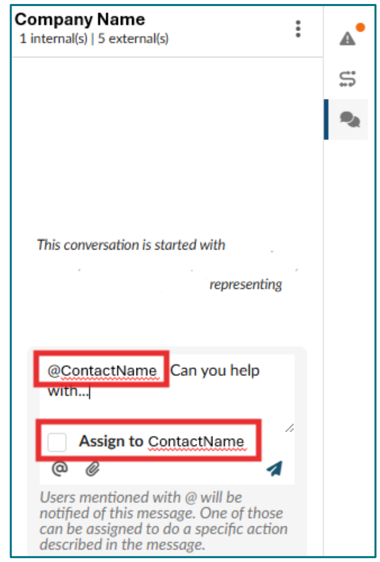


In the header of the conversation, you can see how many Internal (BAE Systems) and External (Supplier) contacts will have access to conversation. To view the full list of users, click on the vertical ellipses and select **Subscribers**.



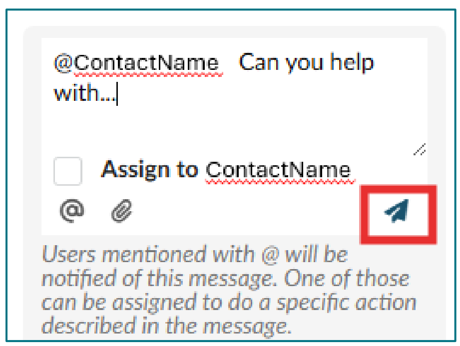
Important Note: If you do not see any internal users in the conversation, then you will not be able to contact a BAE Systems representative with this chat. Please email your BAE Systems representative so they can update your profile to use this chat feature.

When contacting BAE Systems, **you must use the @ symbol and select the contact name(s) specifically in the chat**. Otherwise, they will not receive any notifications that the message was sent.

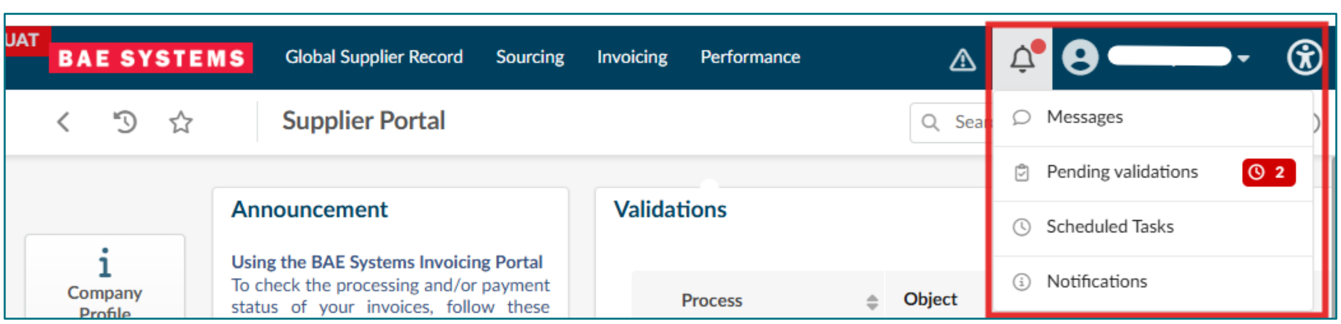


You can optionally choose to assign a task to a user who has been mentioned with @ by clicking the checkbox next to the **Assign To** field and selecting the contact name.

When you are ready to send the message, click the airplane icon.



You will receive notifications as users respond to your conversation. To view your conversations in a consolidated list, select the bell icon on your header bar and select **Messages**.



Updating your Global Supplier Record and Locations

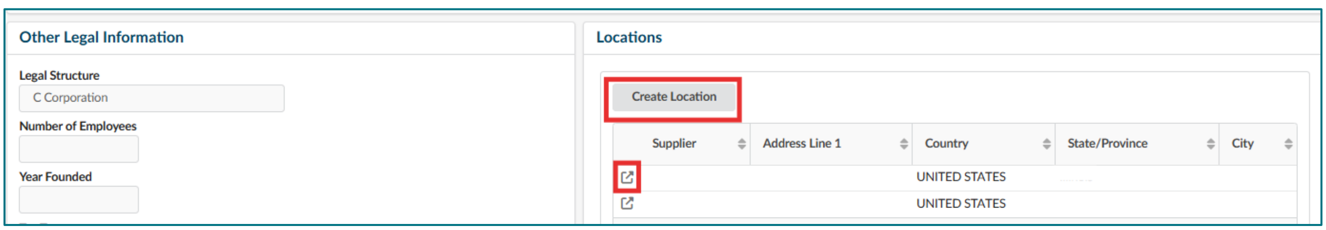
Returning to the Global Supplier Record, please review the data on the **Global Supplier Record** page for the following:

- Ensure that information in each section is accurate. If you need to edit any of the information found in the Company, Address, Supplier – NAICS, or Other Legal Information sections, click the **Request Information Change** button at the top center of the screen. See the next section for guidance on Change Requests.

- When reviewing the NAICS code, please note the following and revise as applicable:

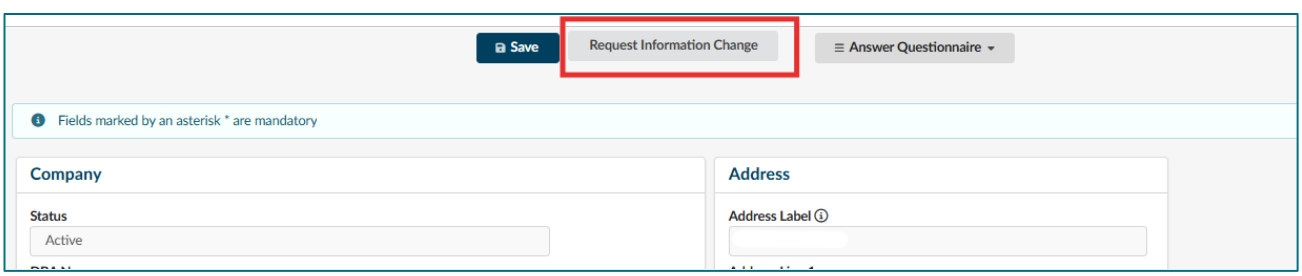
  BAE Systems has eliminated the wholesaler/retailer NAICS codes from our selectable options due to rules imposed on Federal Contractors. Per 13 CFR 121.402(b)(2), acquisitions for supplies must be classified under the appropriate manufacturing or supply NAICS code, not under a Wholesale Trade or Retail Trade NAICS code. For example, if you are a New Car Dealer [441110], you would onboard as an Automobile and Light Duty Motor Vehicle Manufacturer [336110], even though you did not manufacture the automobile you are selling. A nonmanufacturer is deemed small if it has 500 or fewer employees and meets the requirements of 13 CFR 121.406(b).

- Review your locations at the bottom of the page. You will have the ability to add a new location (by selecting the Create Location button) or edit any existing locations (by selecting the Open icon).

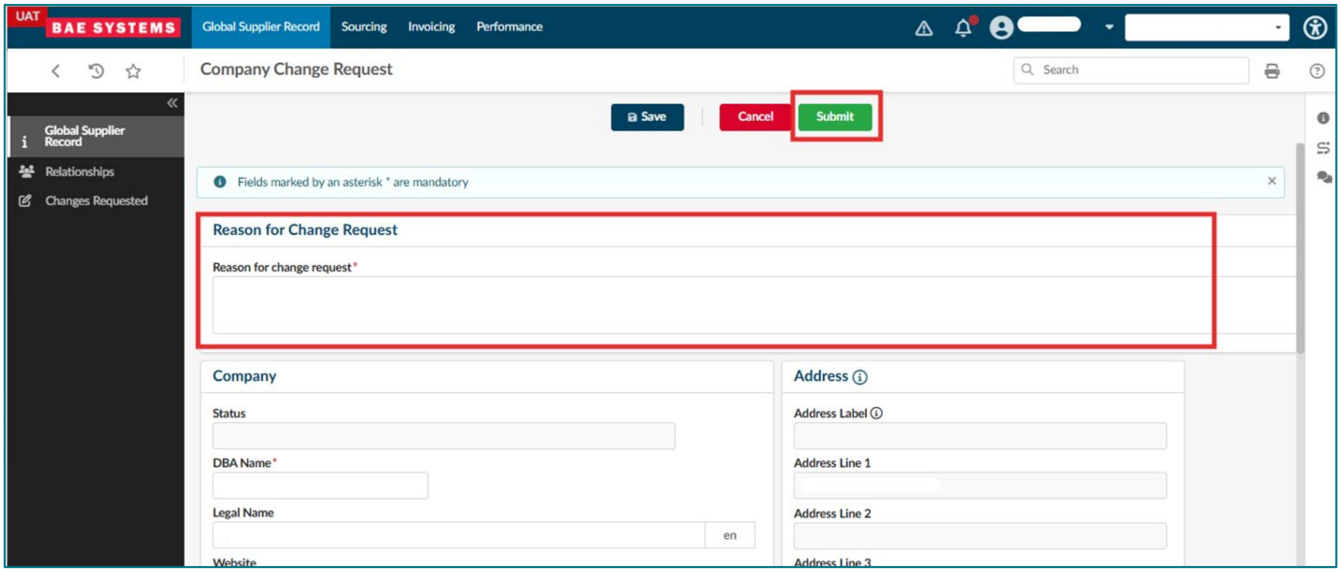


Requesting Information Change

If you need to update information on your Global Supplier Record, click the **Request Information Change** button to submit a change request. Please note that once a change request is submitted, you will not be able to make further updates to your record until that request is approved. If you have multiple fields that need to be adjusted, we recommend submitting them in the same request to streamline processing.

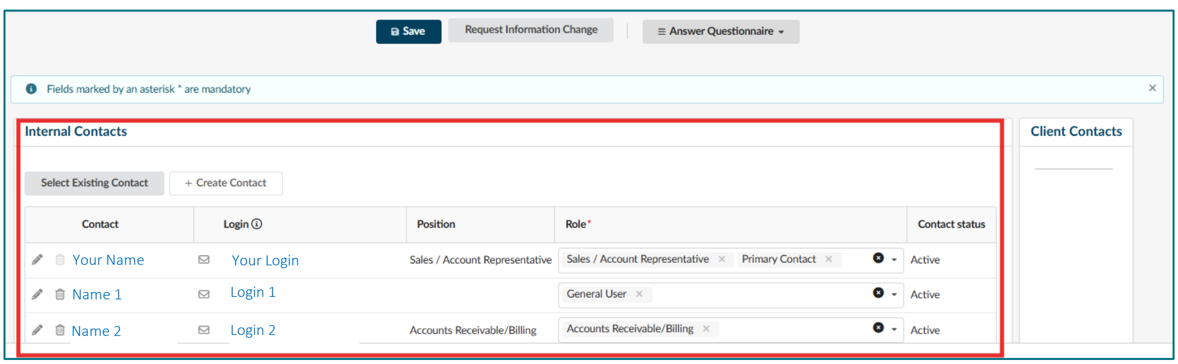


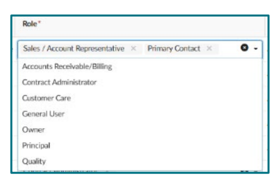
This will open a new screen where you can add a reason for the change and adjust the impacted fields. Click the **Submit** button to send your request to BAE Systems' e-business team. Please allow 2 business days for the e-business team to confirm your change. If this is an urgent request or it has been over 2 business days, contact your BAE Systems representative for assistance.



Updating your Contacts

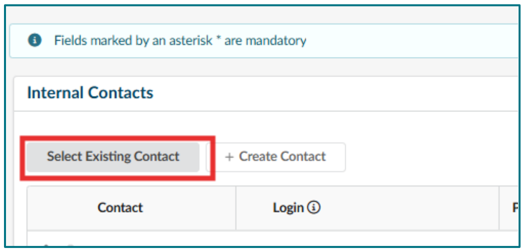
Next, review the Contacts menu to ensure your internal contacts are up to date.

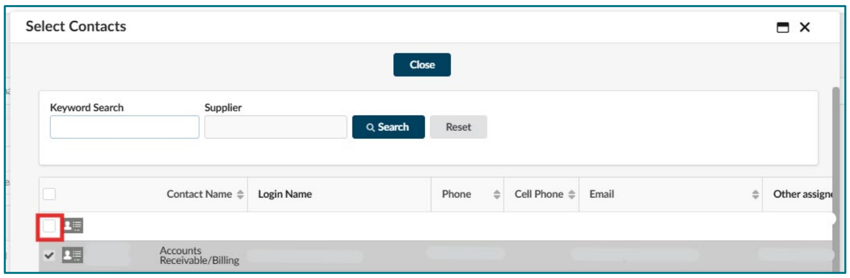


- First - review the list of existing contacts:
  - To edit a contact, click on the pencil icon next to the person's name 
  - To assign a contact a role, click on the Role field and select from the dropdown list. Please note that one user must be assigned as the Primary Contact role, and users can be assigned multiple roles. 

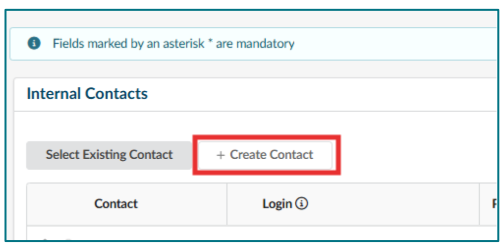
  - To remove a contact, click on the trash can icon next to the person's name 

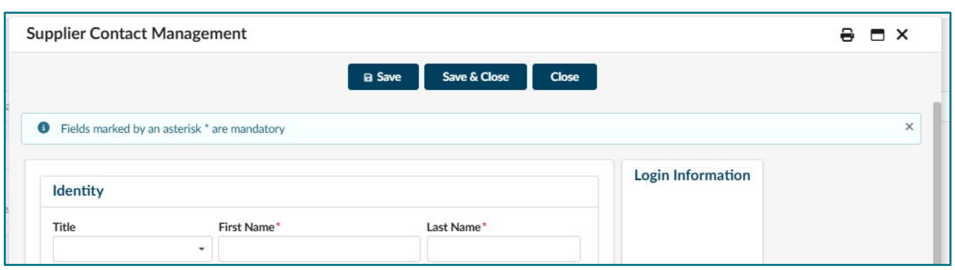
- Next - add any missing contacts to the list:
    - First, click the Select Existing Contact button to browse the list of related supplier contacts. If you find the contact, click the checkbox to add them to this list.





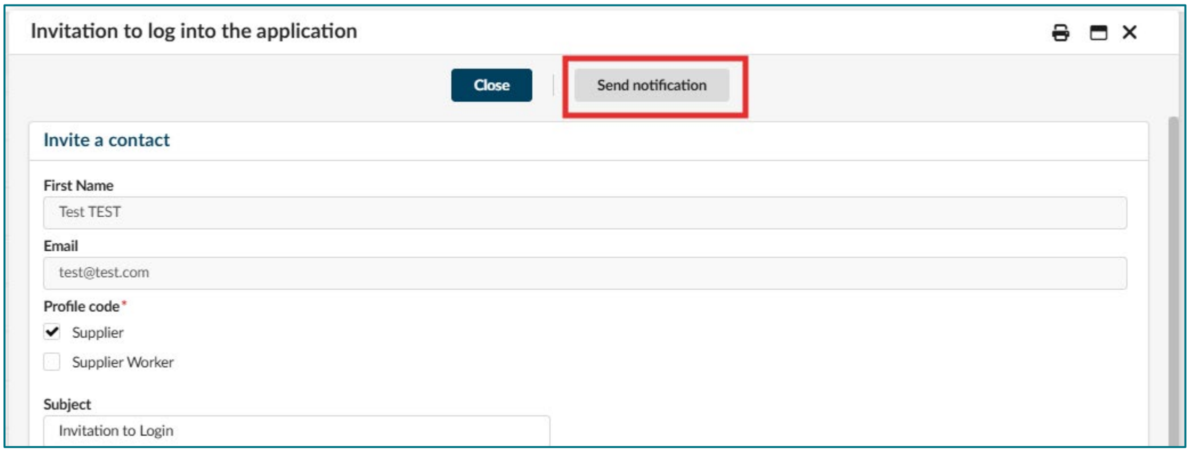
    - If you do not find the contact you're looking to add, return to the Contacts menu and click the Create Contact button to open a menu for adding a new contact. Complete the required fields and then click the Save and Close button.





- Finally – setup the user on your Internal Contacts list:
    - Search for the user's name on the Internal Contacts list.
    - Assign a role to the user.
    - Click the Mail icon next to their name to forward them an invitation to join Ivalua.

- On the popup screen, click the Send Notification button to invite the new user to join Ivalua.



If you have any issues with extending an invitation to other users, please reach out to your BAE Systems representative for assistance.

Step 2 – Confirm Business Unit Relationships

In Ivalua, Relationships are used to connect your business to the different BAE Systems' business unit. This step shows how to confirm your Relationship with a business unit, and it **must be completed for each business unit you do business with** so you can receive your requirements for Relationship-level questionnaires and documentation.

If you need to establish a Relationship with a new business unit, please reach out to your BAE Systems representative for assistance.

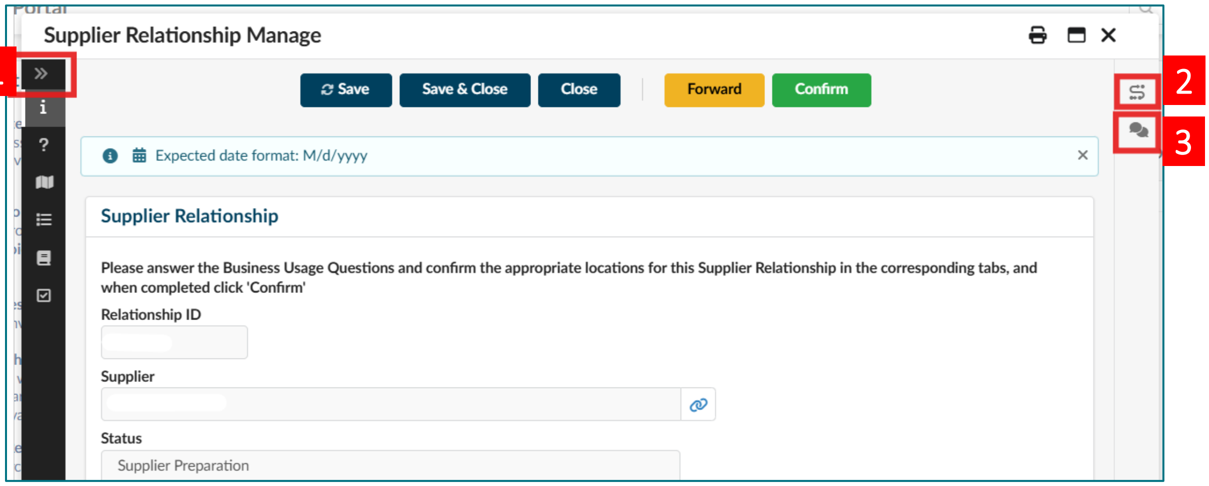
Opening the Supplier Relationship Process

From the homepage, navigate to the Validations section. Select the Supplier Relationship process task you're looking to complete, noting that the associated business unit will be listed in the Object link. At this stage, your action will be listed as Enrollment Preparation. To open the record, click either the pencil icon (for a full screen view) or the Object link (for a pop-up screen view).

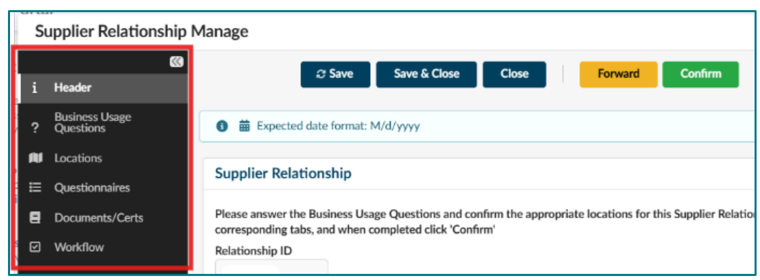
Navigating the Supplier Relationship Management screen

Let's get familiarized with this screen:

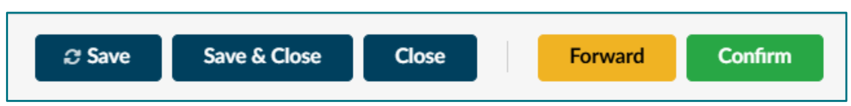
1. Main Menu – This menu bar is collapsed by default. Click to expand and view the available menu options.
2. Workflow – This button provides a summary of the workflow for this record. For a more detailed view, navigate to the Workflow option in the main menu.
3. Conversation: This button opens a screen for viewing and initiating discussions with your BAE Systems representatives.



Expanding the menu bar reveals the menu options. You'll start on the **Header** tab, which displays general information about the Relationship, including its status, type, and primary contacts. We'll cover the remaining sections in more detail as we progress through the enrollment steps.



In the main section of the form, you should see either a **Confirm** or **Submit**. This label will vary depending on where you are in the onboarding process and is an indication that you've been assigned to the Relationship. If you do not see these buttons, please contact your BAE Systems representative to be properly assigned.



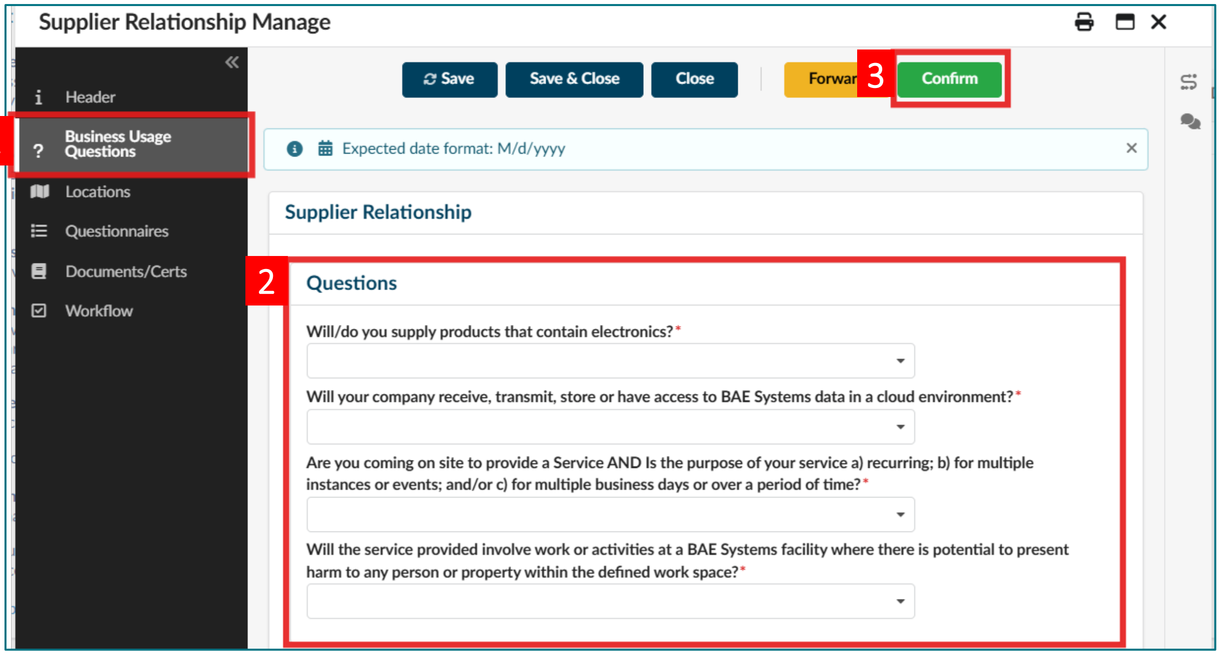
Confirming your Relationship

To confirm your Relationship with the business unit and continue the enrollment process, follow these steps:

1. Navigate to the **Business Usage Questions** tab, which contains four questions designed to determine the questionnaires and documents required to establish a Relationship with the business unit.

2. Answer all four questions to continue to the next step.
3. Click the **Confirm** button to submit your response.

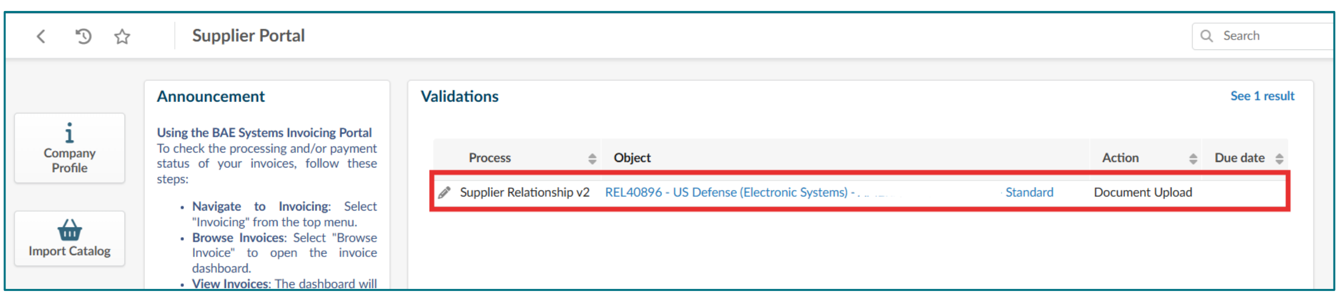
Clicking the **Confirm** button is crucial to understanding your specific questionnaire and document requirements.



If your company has already completed the business usage questions but the Confirm button is still visible, **please click it** to receive your customized questionnaire and document/certification requirements.

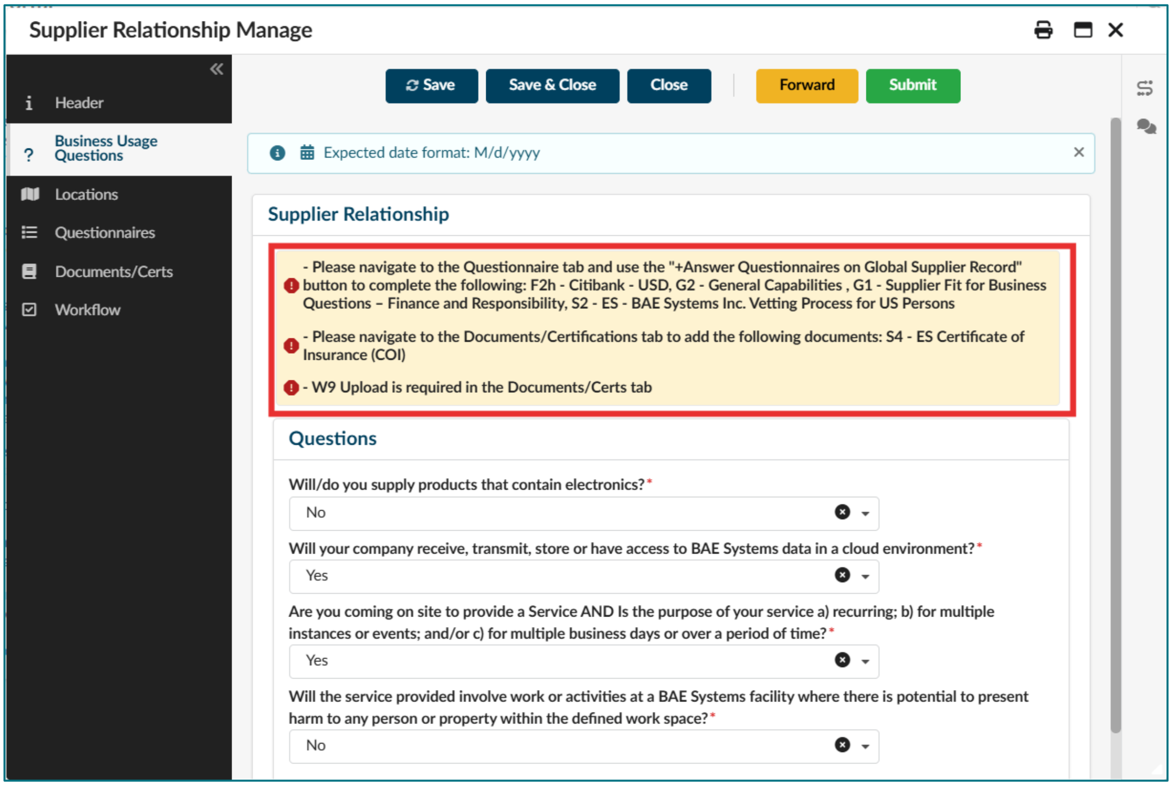
After clicking Confirm, you will notice the following changes on your record:

- The Validation record on the homepage will be updated to the action: **Document Upload**



- The Relationship task will show alerts with the actions that must be completed before submitting the record back to BAE Systems. There are two different types of alerts:
    - **Blocking Alerts** (Red Stop Signs) – These are critical alerts that prevent you from proceeding with a workflow until the issue is resolved. You must make the required updates to submit the record.

- Warnings (Orange Triangles) – These are non-critical issues or informational messages, and you will still be able to submit the record with these warnings.



Note on Remaining Steps

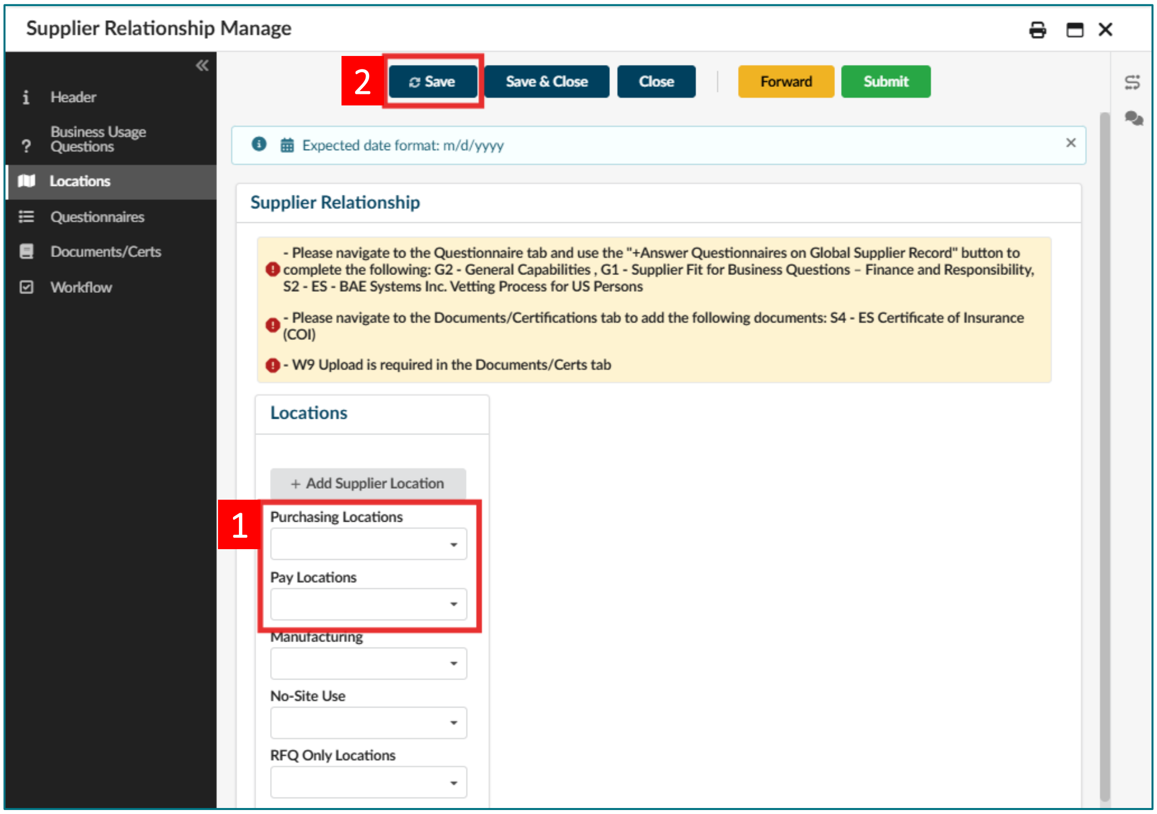
The remaining steps can be completed in any order, but we will continue to follow the process in the order presented in the menu.

If you're not the best person to complete an action, please reach out to your BAE Systems representative for assistance with sending the request to a different contact within your organization.

Step 3 – Verify Locations

For each Relationship, you will need to specify and categorize the locations relevant to the business unit. This involves linking the locations you created or reviewed in Step 1 (see Updating your Global Supplier Record and Locations) to the Relationship.

Navigate to the **Locations** menu, where you will see the options for location types. You'll be required to add at least one Purchasing Location and one Pay Location to submit your record to BAE Systems. Click the dropdowns under each header to select the relevant locations, and then click the **Save** button.

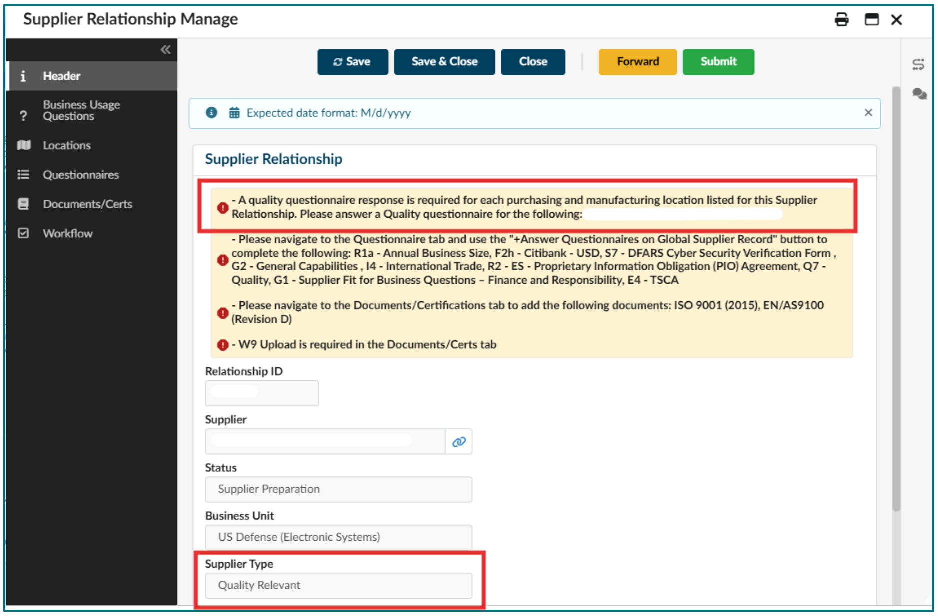


If your location is not on this list, click the **Add Supplier Location** button to create a new location, and then return to add the location to the appropriate category.

Note for Quality Relevant Suppliers

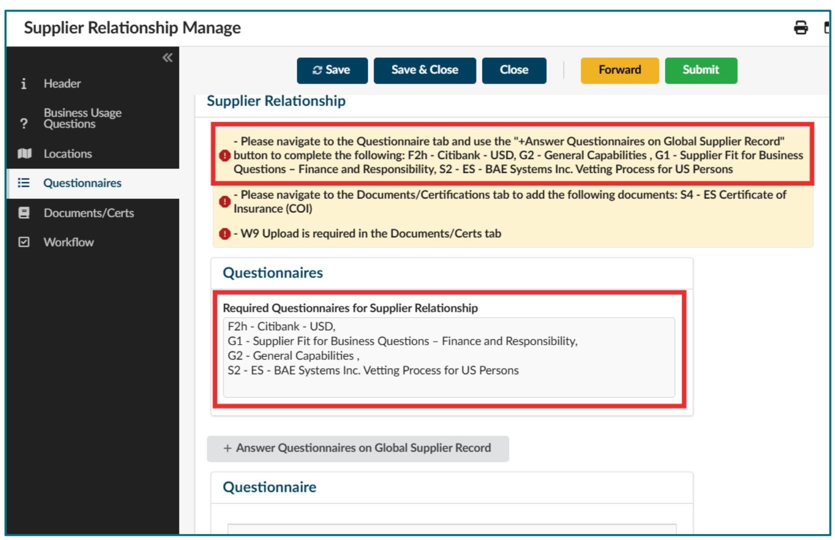
If your Supplier Type is listed as Quality Relevant on the Header tab, you will need to complete a Quality questionnaire for **each Purchasing and Manufacturing location** you've added above. The Quality questionnaire is a requirement at the location level. Therefore, if you have multiple Purchasing and Manufacturing locations, you will need to complete a separate questionnaire for each one in the next step.

A distinct blocking alert will appear at the top of your screen, detailing which locations require the Quality questionnaire.



Step 4 – Complete Questionnaires

For each Relationship, you will be assigned specific questionnaire requirements based on your answers to the Business Usage Questions in Step 2. Navigate to the **Questionnaires** tab to view the list of required questionnaires for the selected supplier Relationship. These will also appear in the alert at the top of the screen.



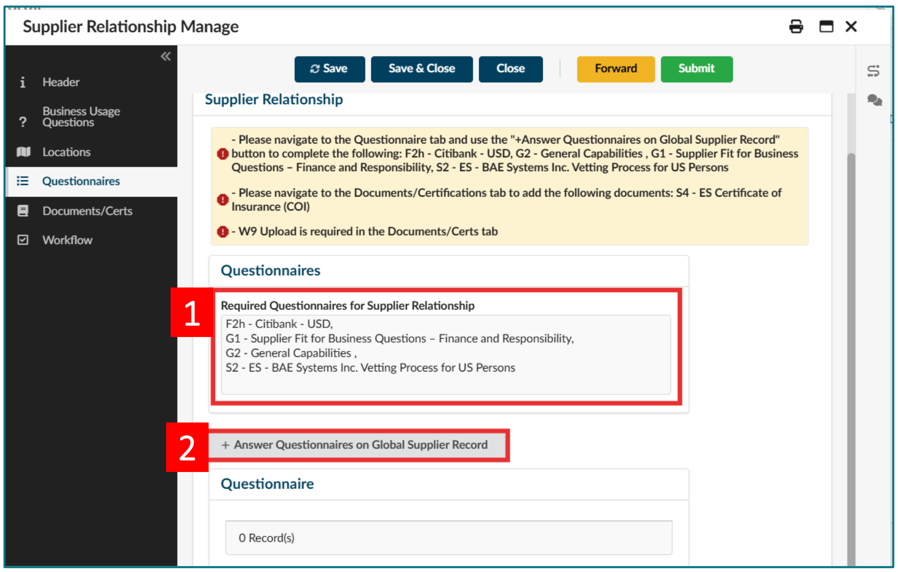
Adding a Questionnaire

Recalling the section on Understanding the Global Supplier Record and Relationships, the questionnaire requirements are **defined** at the Relationship level and **completed** on the Global Supplier Record level. This approach enables you to share questionnaires shared multiple business units when applicable.

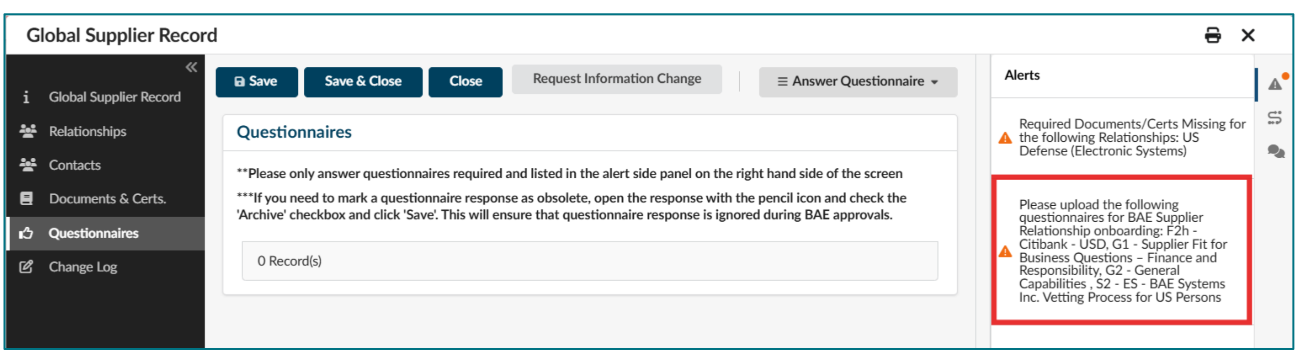
When working through the next steps, the application will navigate you to the Global Supplier Record to answer your questionnaires, **but you only need to complete the requirements related to the relationship you are looking to complete**.

To best manage this process:

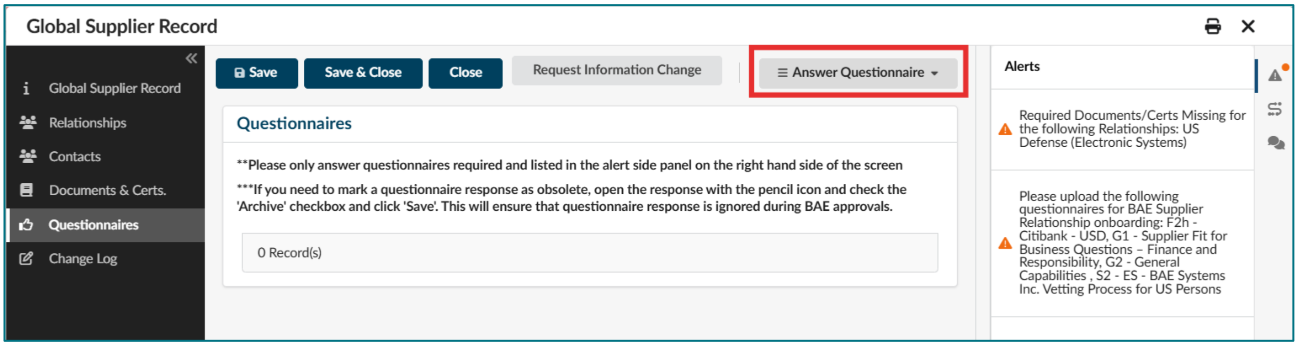
1. Copy the information from the **Required Questionnaires for Supplier Relationship** into a separate document, as the blocking alerts on the next screen will be for all relationships you have in process, and they are not be presented in a list format that is easy to review.
2. Click the **Answer Questionnaires on the Global Supplier Record** button to proceed.



3. This will open the Questionnaires menu on the Global Supplier Record. If you are focusing on completing a single relationship, please disregard the list in the Alerts menu on this screen, as it will reference your required questionnaires across **all Relationships**. Refer to the Questionnaire tab on the Relationship screen (shown above) to understand your requirements by Relationship.

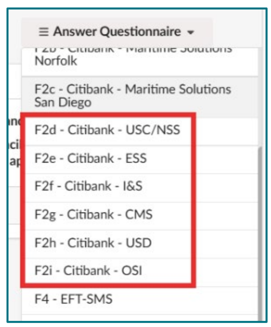


4. To add questionnaires to your record, click the **Answer Questionnaire** button at the top of the screen. This will open a dropdown list of available questionnaires.



5. To find the correct questionnaires, refer to the list you copied from the requirements screen. Be sure to pay attention to the full name of the questionnaire, as some are duplicated for each business unit.

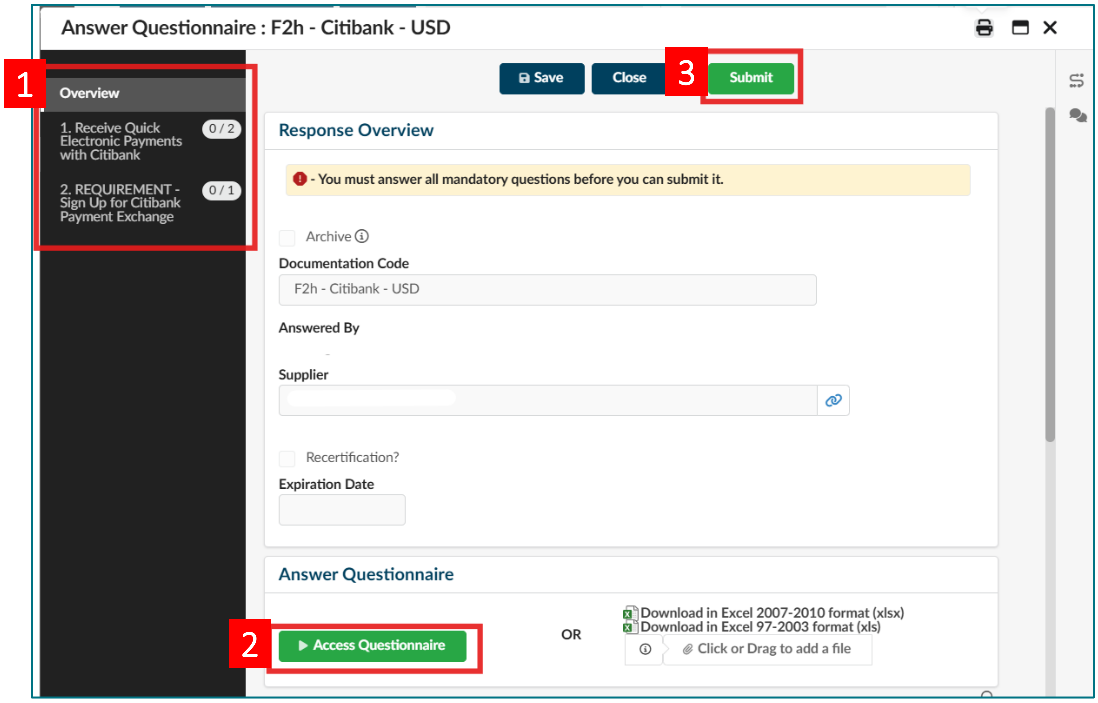
   For example – the Citibank questionnaire has multiple versions, each with a unique ID (e.g., F2d, F2e) and business unit suffix (e.g., USS/NSS, ESS). You must complete the specified questionnaire to establish the Relationship with BAE Systems.



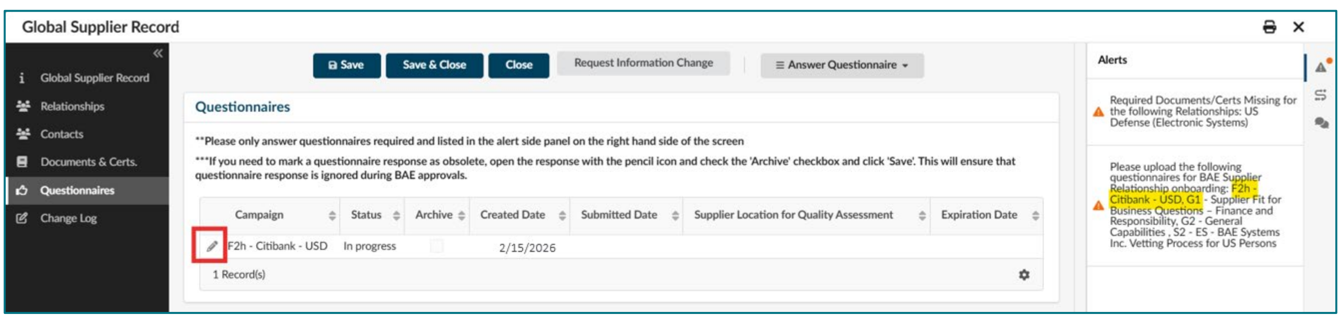
Completing your Questionnaire

When you select the desired questionnaire, a new screen will appear. To complete your questionnaire:

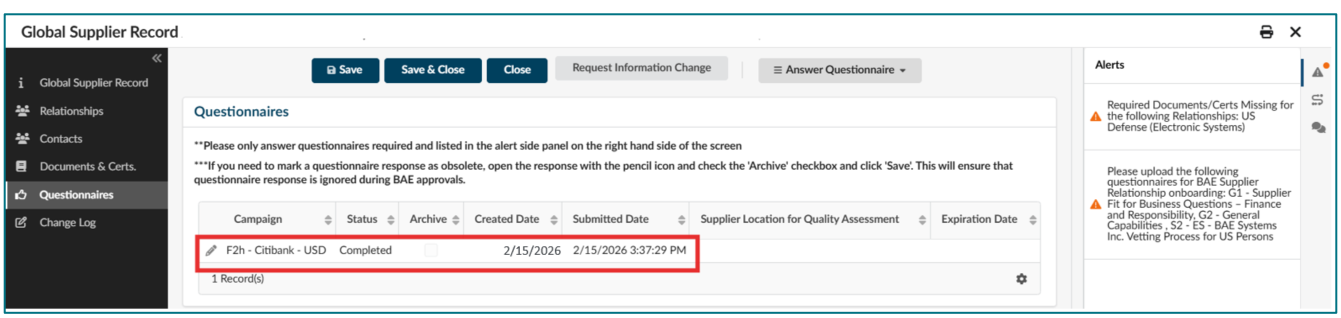
1. Review the **Menu Bar** to check the overall status of the questionnaire completions and navigate to different sections of the questionnaire. The section headers display the number of questions completed vs. the total number of questions.
2. Click the **Access Questionnaire** button to open the questionnaire.
3. When the questions are all completed, click the **Submit** button to send your response to BAE Systems. If you are not ready to submit, you can save and close the record to complete it later.



If you save a record without submitting it, you can edit it later by clicking the **pencil icon**. The checklist name will remain on your **Alerts** menu until you submit the record.



When you submit a record, the status will change to Completed and the line will be removed from your **Alerts** menu.



Updated February 2026

Not export controlled per GT Standard 5

Click the close button to return to the Relationship level, where you can verify that the blocking alerts have been cleared for the relationship. You may need to refresh the screen to view the updates you made on the previous screen.

As a reminder, you will not be able submit your record to BAE Systems until all alerts have been cleared for the Relationship.

Troubleshooting Questionnaire Issues

If you run into issues or have questions when completing your questionnaires, please don't hesitate to contact your BAE Systems representative for assistance.

For reference, here are some common questionnaire issues and their resolutions:

- Questionnaires added in error
    - If you accidentally click on a questionnaire option on the dropdown, a BAE Systems representative can remove it from your record.
- Duplicate questionnaires
    - If you initiated a questionnaire and later found that it has also been started by someone else in your company:
        - Determine who is the correct contact to complete the questionnaire
        - Contact your BAE Systems representative to remove the duplicate questionnaire. Be sure to specify the name of the person who started the questionnaire you'd like to remove so we can remove the right record.

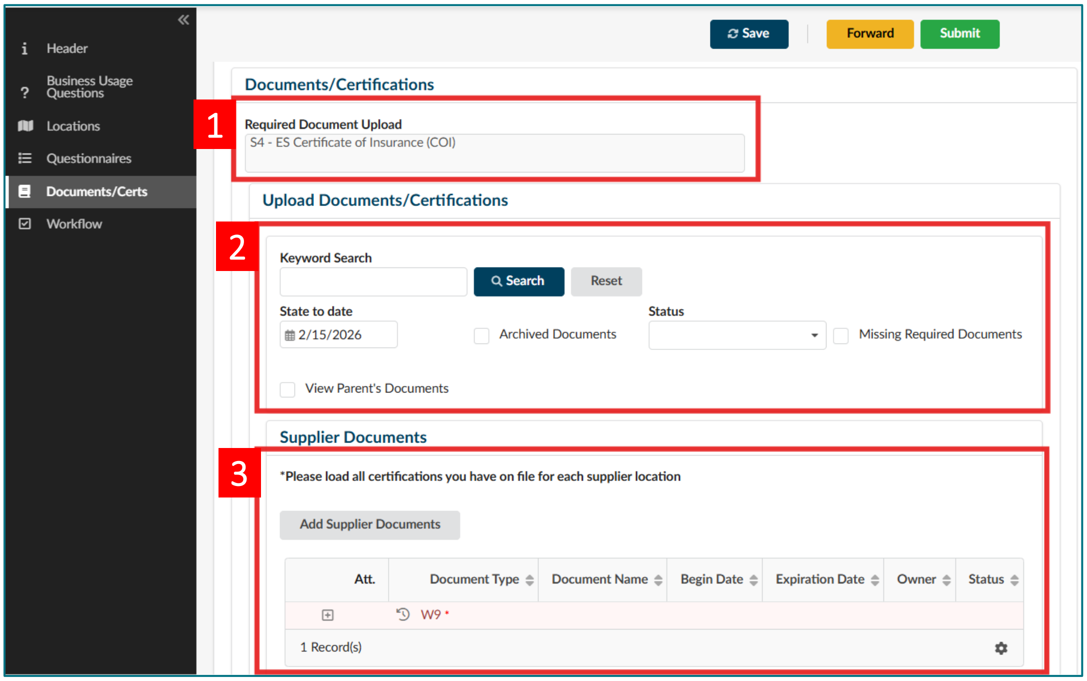
Please note that if you do not reach out to BAE Systems to resolve these issues, they will not prevent you from submitting your record to BAE Systems if the blocking alerts have been cleared. However, you will continue to see email notifications on the incomplete questionnaires.

Step 5 – Add Documents and Certifications

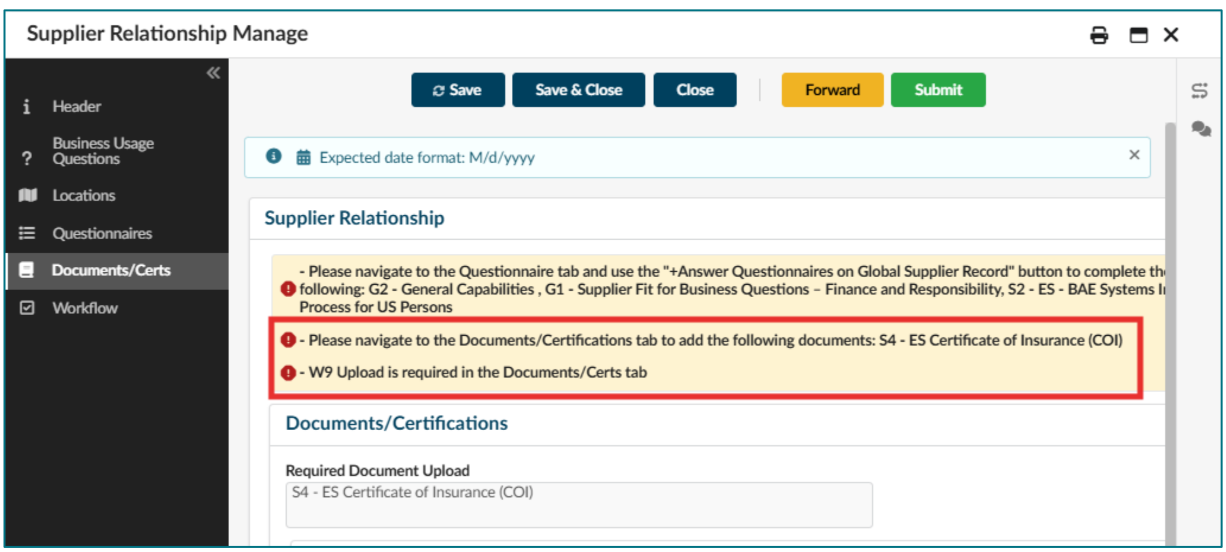
For each Relationship, you will be assigned specific documents and/or certifications based on your answers to the Business Usage Questions in Step 2.

Navigate to the **Documents/Certs** menu and scroll down to view the following:

1. List of required documents and certifications to upload, excluding your W9 (which comes pre-populated in the Supplier Documents table).
2. Document Search section for filtering your attachments.
3. Supplier Documents section for adding your attachments.

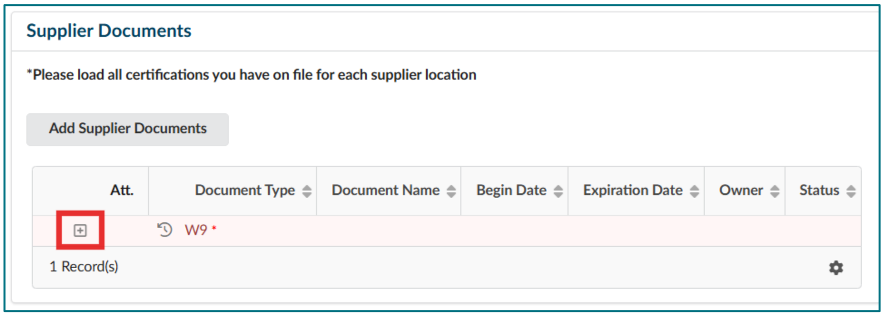


At the top of the screen, you will also see alerts that call out the missing documentation requirements. These must be cleared before you submit the record to BAE. As with the questionnaires, be sure to pay attention to the full name of the document or certification as you work through this step.



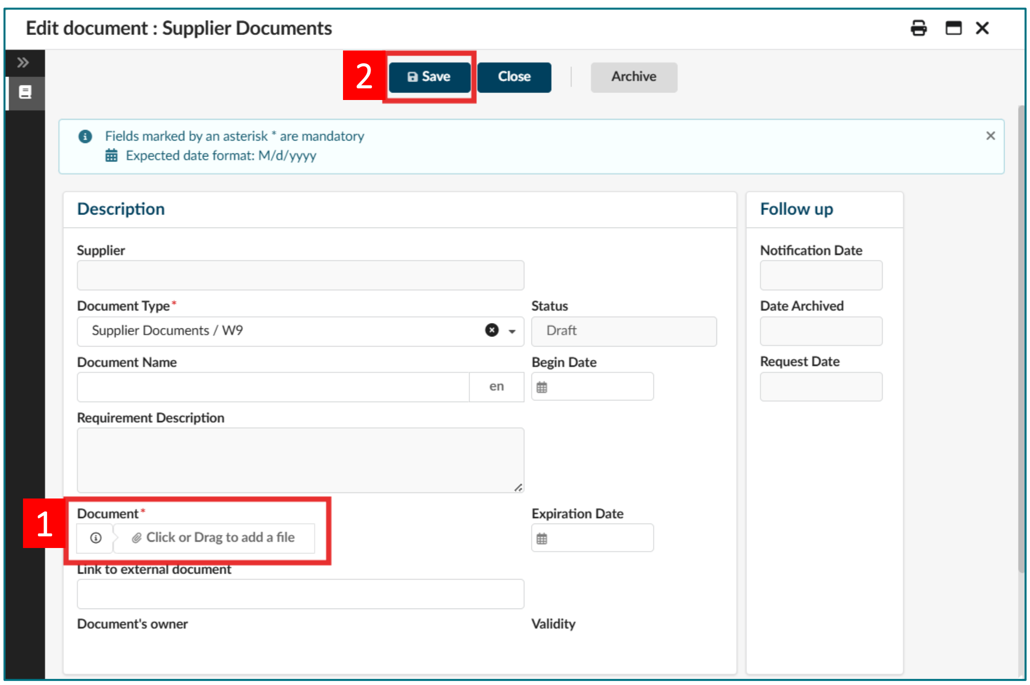
Uploading W9

To upload your W9, scroll to the Supplier Documents section, locate the document type named W9 and click the Add icon.



This will open the form for attaching your W9.

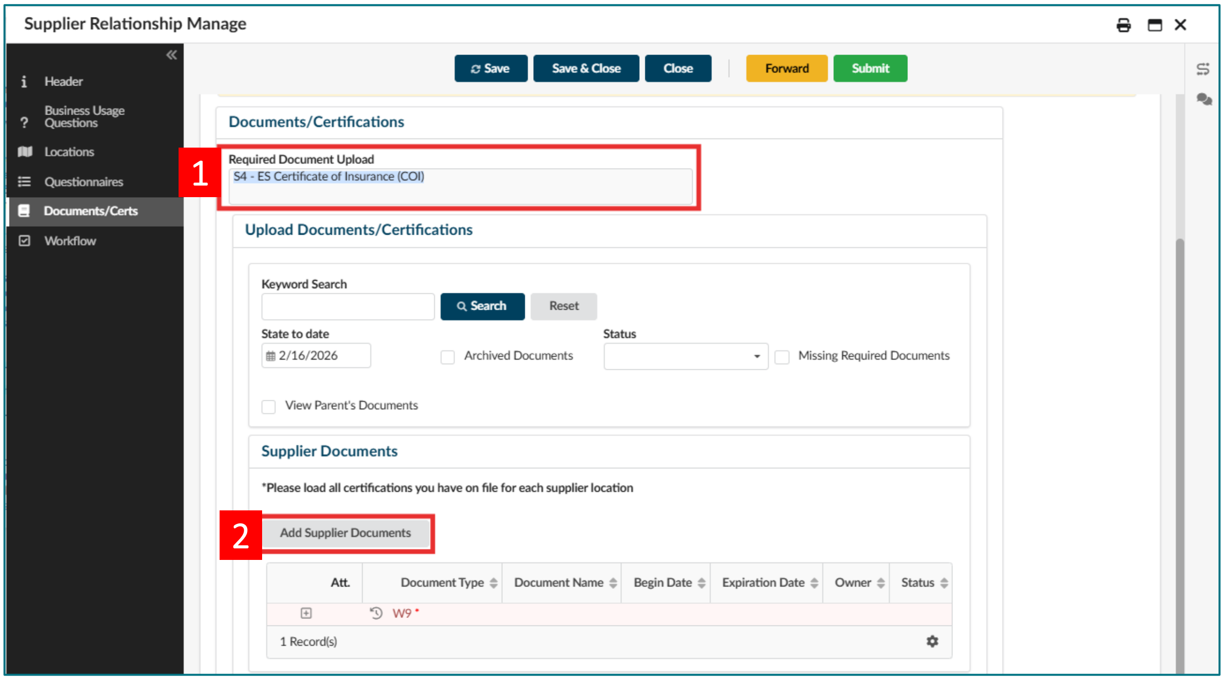
1. In the Document section, click to pull up your files and attach your W9, or drag and drop your W9 to this location to attach it.
2. Click the **Save** button to record your results.



Uploading Additional Required Documents

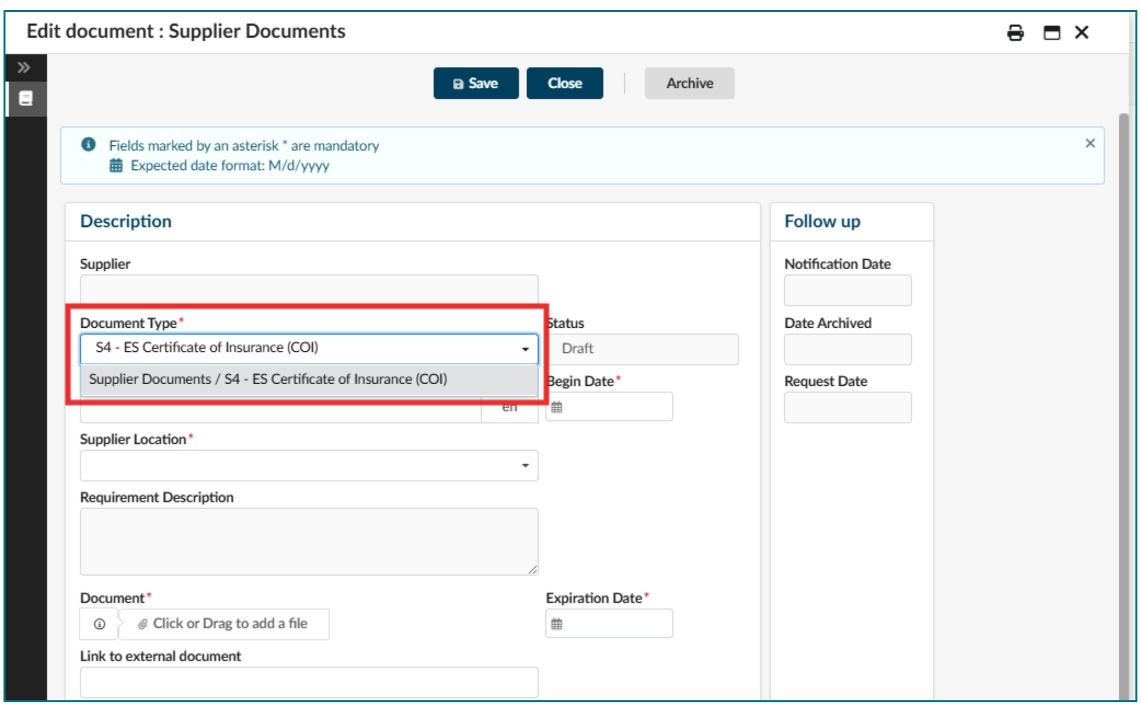
To upload other required documents or certifications, follow these steps:

1. Copy the name of the document you're looking to attach from the **Required Document Upload** list.
2. Click the **Add Supplier Documents** button in the Supplier Documents section. This opens a record for you to add a new document.

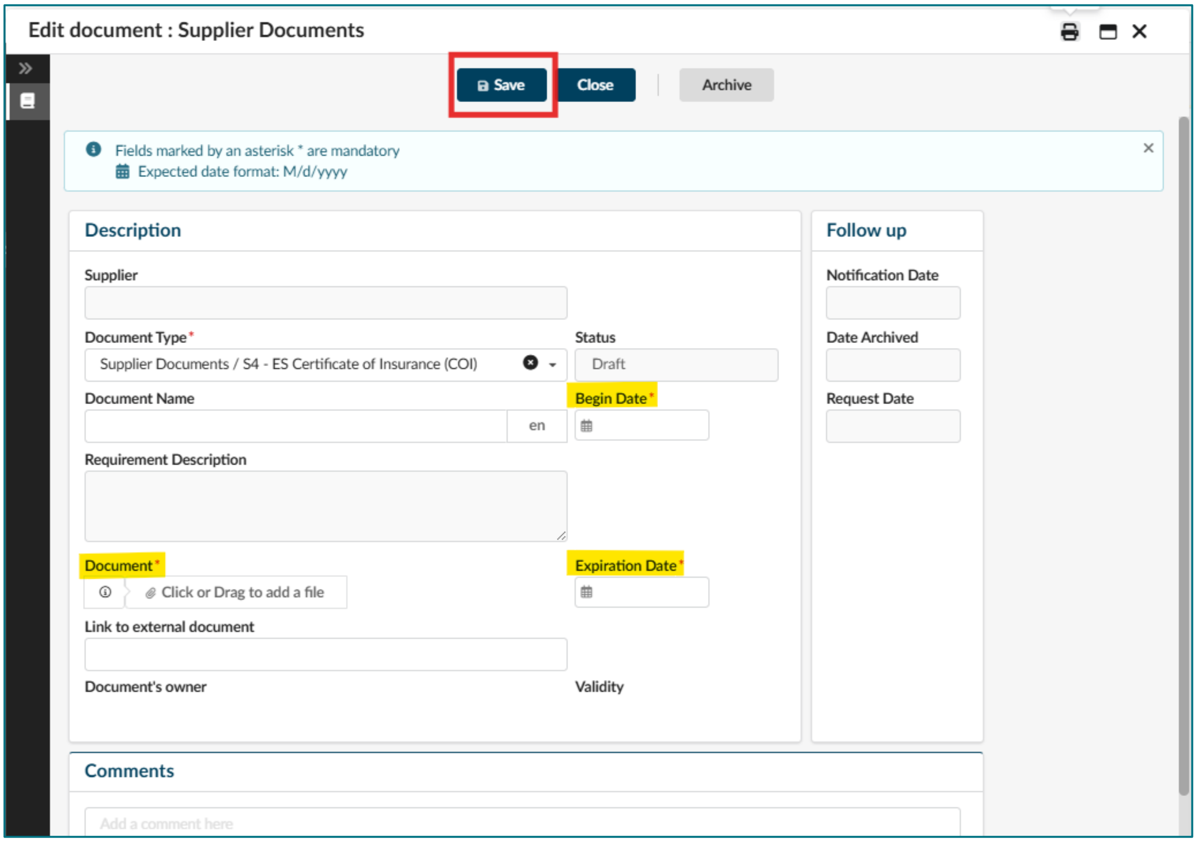


3. Paste the document name into the **Document Type** field to easily locate the record on the list and click the dropdown option that appears.

   It is important to **select the proper document name** to clear the blocking alerts. As with the questionnaires, there are some document types with similar names, so we recommend **copying and pasting** into this field instead of free searching to ensure accuracy.



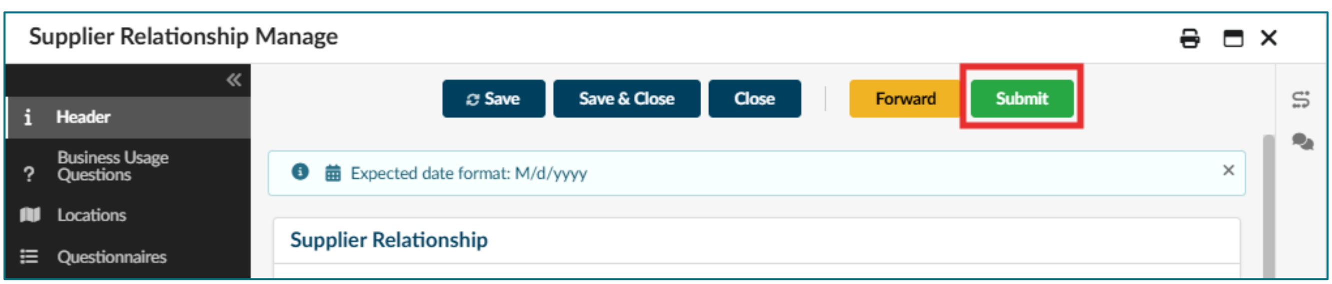
4. Complete the required fields based on the document type you've selected. Then click the **Save** button to save the record.



As a reminder, you will not be able to submit your record to BAE Systems until all alerts have been cleared.

Step 6 – Submit Record

Once you've completed steps 1-5 and cleared all the alerts, you can click the **Submit** button to send the Relationship to the business unit for review.

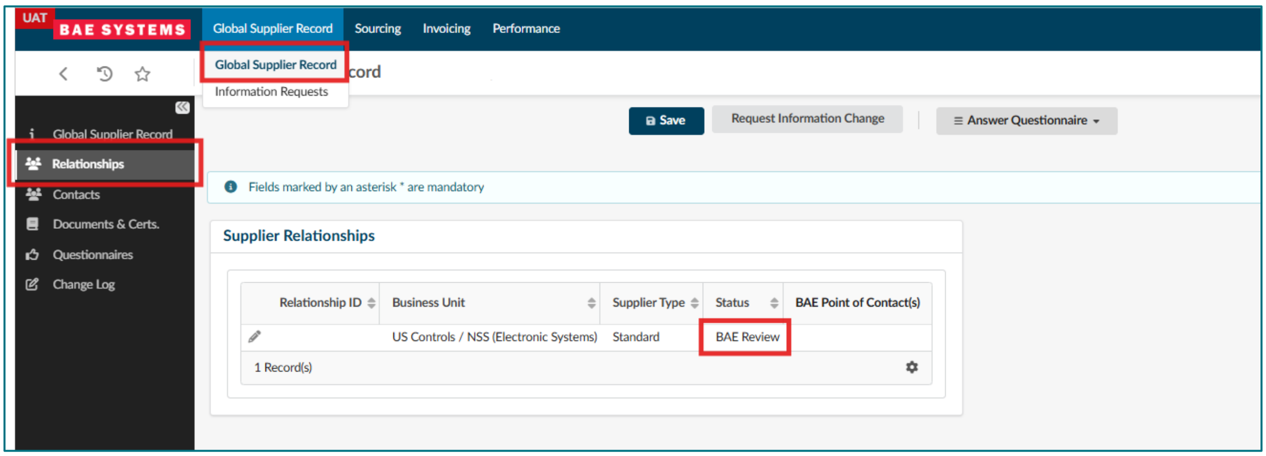


If any questions or issues arise during the review process, you will receive an email notification that further updates are required. This may involve:

- A task being returned to your **Validations** queue, or
- A message sent through a **Conversations** screen.

Please respond promptly to these notifications to keep the onboarding process moving forward.

You can always check your onboarding status by navigating to the **Global Supplier Record** and clicking on the **Relationships** menu option to see the status by Relationship. If you have multiple Relationships with BAE, you will be able to access each one from this menu.



Ongoing Supplier Maintenance

After completing the onboarding process, we ask that you continue to maintain your supplier contacts in the system. This ensures that they receive important information about upcoming features, updates, and other relevant information.

Refer to the Updating your Contacts section of Step 1 for more details.