

# Ivalua Supplier Onboarding Snapshot

Prepared for BAE Systems, Inc.

*This snapshot is an excerpt from the full Ivalua Supplier Onboarding Guide. Please refer to the full version for more details.*

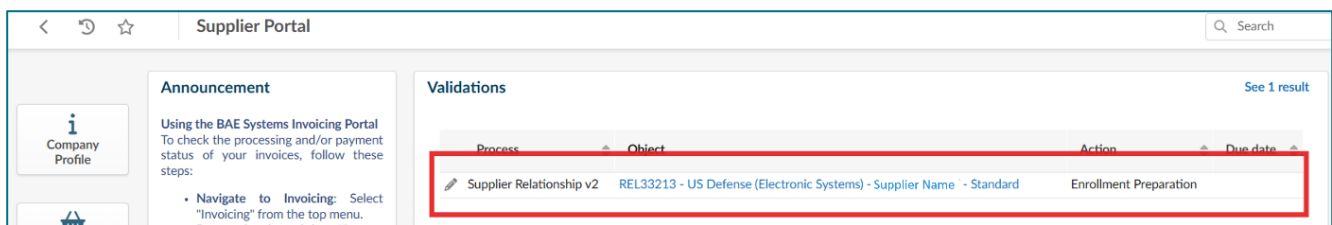
## Step 2 – Confirm Business Unit Relationships

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).

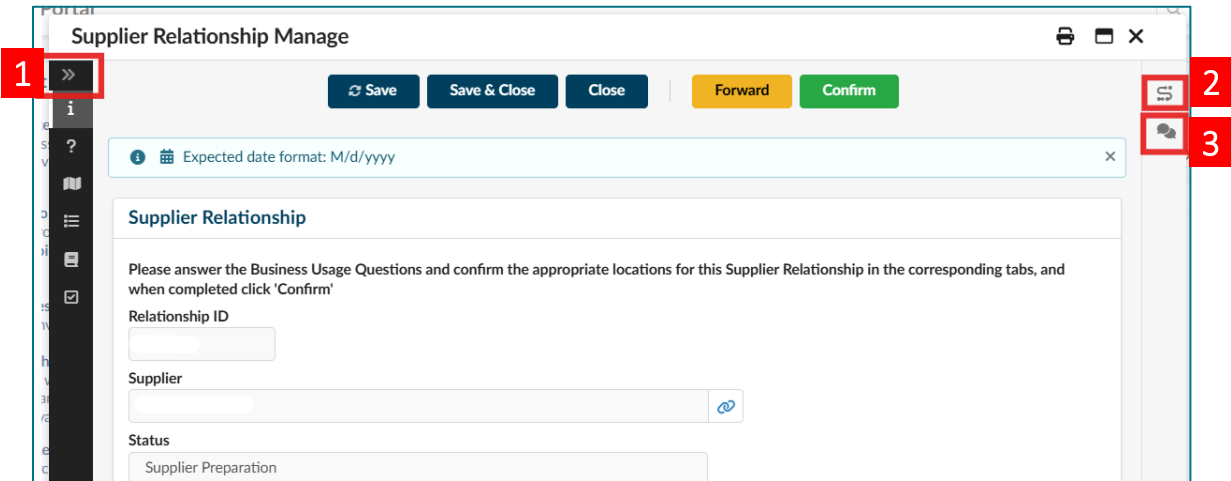


## Navigating the Supplier Relationship Management Screen

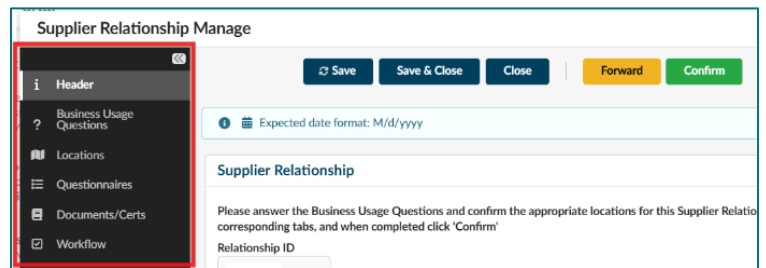
Let's get familiarized with this screen:

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.

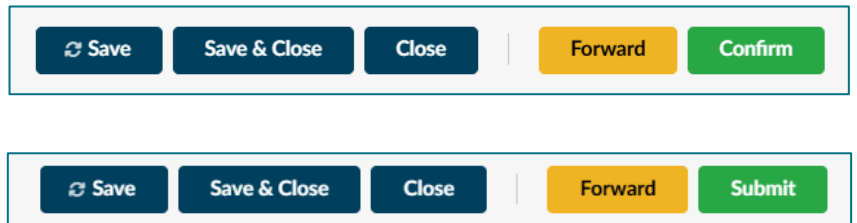
3. Conversation: This button opens a screen for viewing and initiating discussions with your BAE Systems representatives.



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.

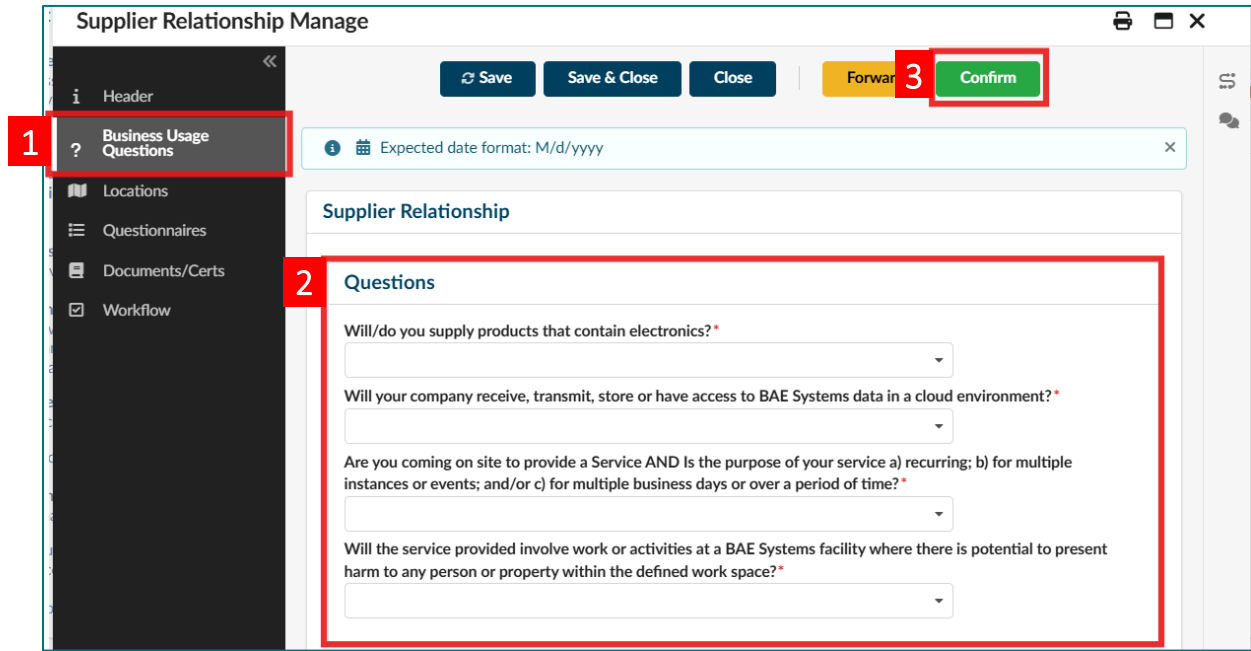


## Confirming your Relationship

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.

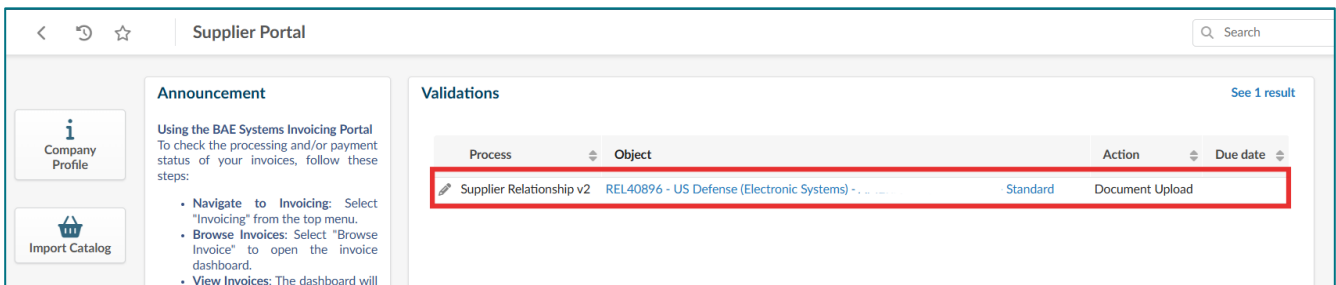
Clicking the **Confirm** button is crucial to understanding your specific questionnaire and document requirements.



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.

**Supplier Relationship Manage** 🔍 📄 ✕

Header ⏪

Business Usage Questions 🔍

Locations

Questionnaires

Documents/Certs

Workflow

Expected date format: M/d/yyyy ✕

**Supplier Relationship**

- ❗ - Please navigate to the Questionnaire tab and use the "+Answer Questionnaires on Global Supplier Record" button to complete the following: F2h - Citibank - USD, G2 - General Capabilities, G1 - Supplier Fit for Business Questions - Finance and Responsibility, S2 - ES - BAE Systems Inc. Vetting Process for US Persons
- ❗ - Please navigate to the Documents/Certifications tab to add the following documents: S4 - ES Certificate of Insurance (COI)
- ❗ - W9 Upload is required in the Documents/Certs tab

**Questions**

Will/do you supply products that contain electronics? \*

No ⊕

Will your company receive, transmit, store or have access to BAE Systems data in a cloud environment? \*

Yes ⊕

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/or c) for multiple business days or over a period of time? \*

Yes ⊕

Will the service provided involve work or activities at a BAE Systems facility where there is potential to present harm to any person or property within the defined work space? \*

No ⊕

Save Save & Close Close Forward Submit

## 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.