

# 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 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.

**Documents/Certifications**

**1** Required Document Upload  
S4 - ES Certificate of Insurance (COI)

**2** Upload Documents/Certifications

Keyword Search  
Search Reset

State to date  
2/15/2026

Archived Documents  Missing Required Documents

View Parent's Documents

**3** Supplier Documents

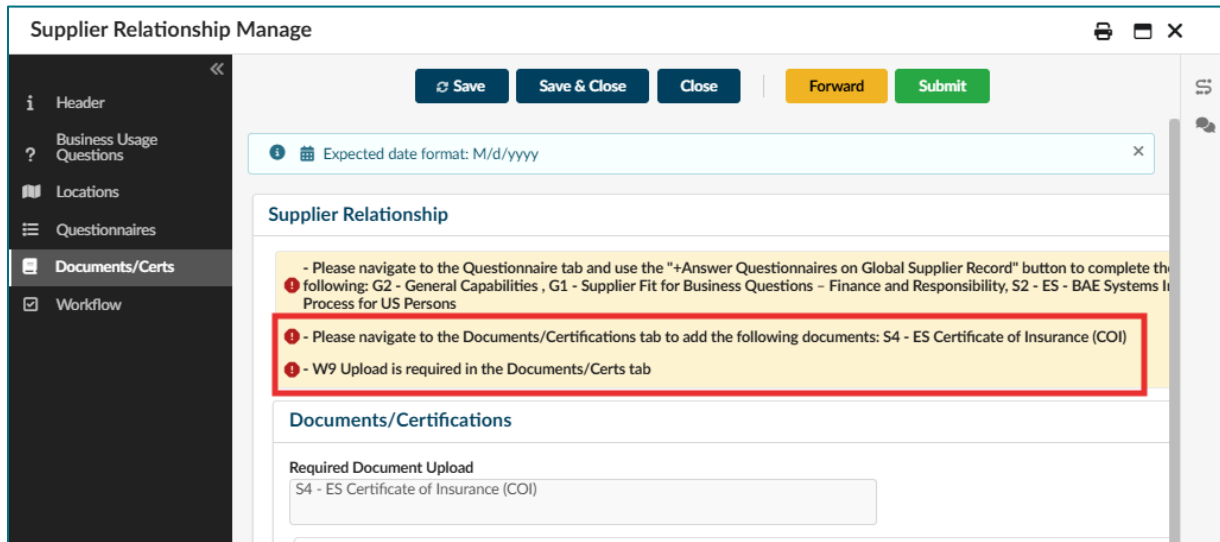
\*Please load all certifications you have on file for each supplier location

Add Supplier Documents

Att.	Document Type	Document Name	Begin Date	Expiration Date	Owner	Status
	W9					

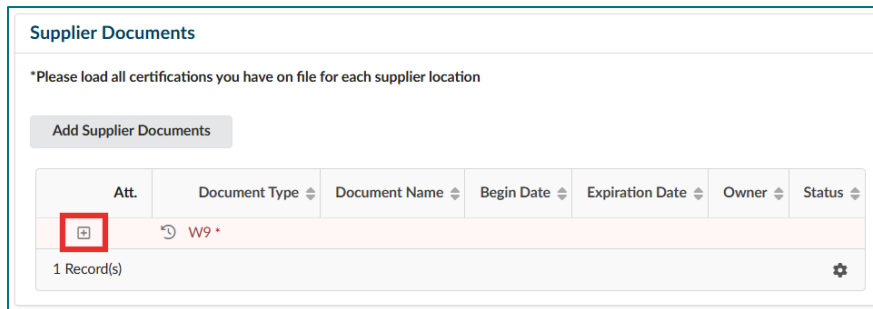
1 Record(s)

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.



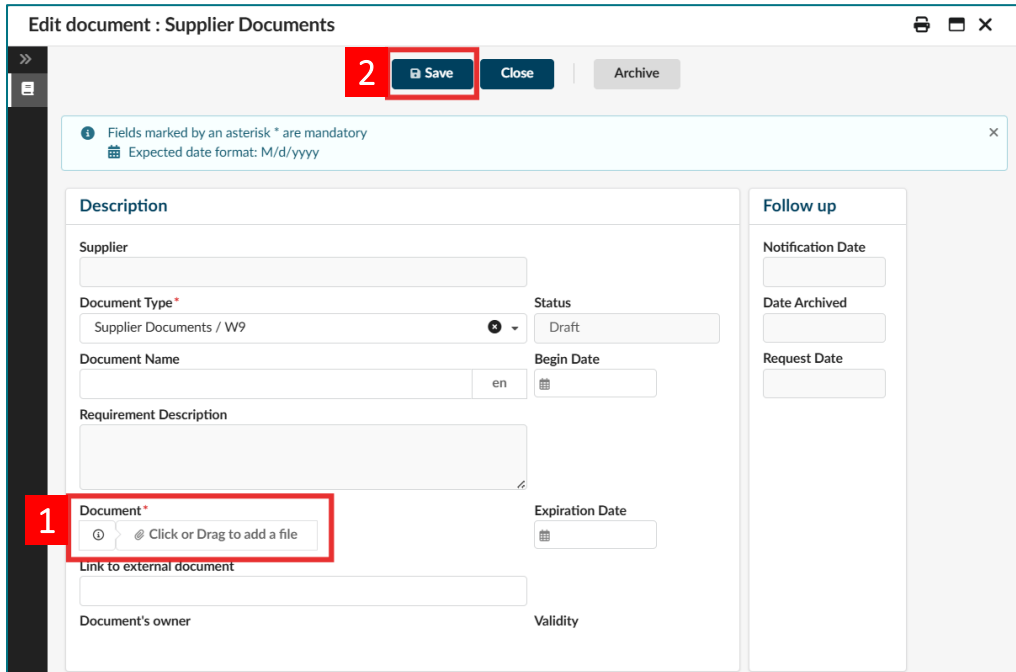
## Uploading W9

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.

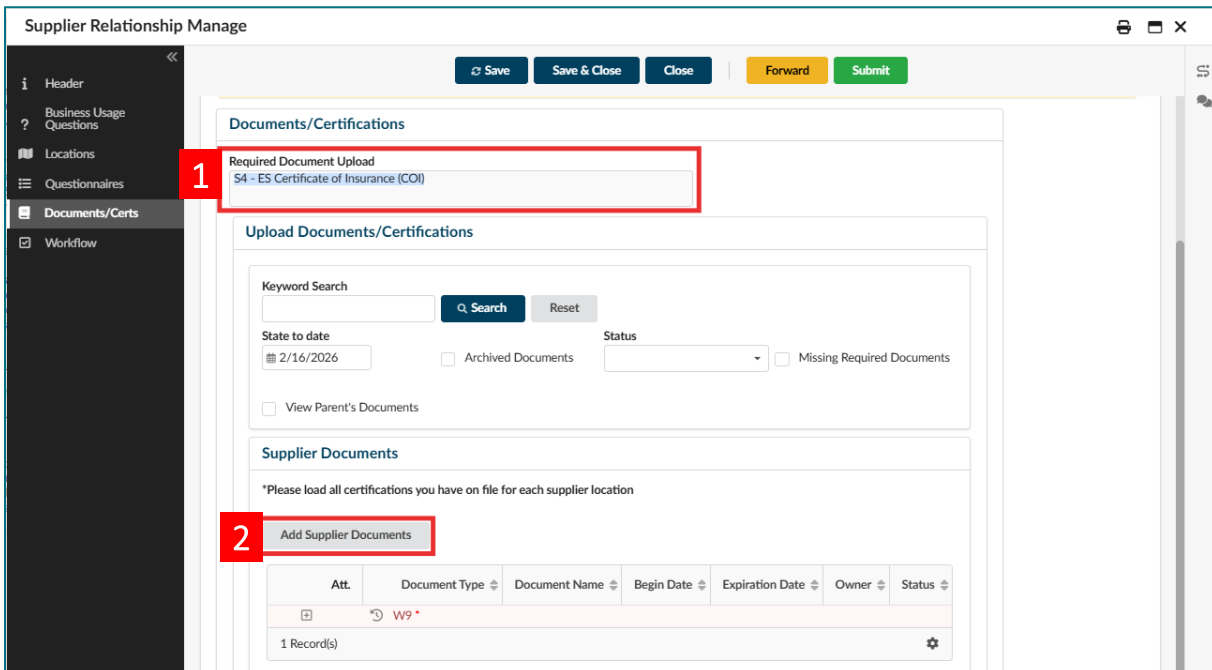
1. In the Document section, click to pull up your files and attach your W9, or drag and drop your W9 to this location to attach it.
2. Click the **Save** button to record your results.



## 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.

The screenshot shows a web form titled "Edit document : Supplier Documents". At the top, there are buttons for "Save", "Close", and "Archive". A message box indicates that fields marked with an asterisk are mandatory and provides the expected date format: "M/d/yyyy". The form is divided into several sections:

- Description:** Includes a "Supplier" field, a "Document Type\*" dropdown menu (highlighted with a red box), a "Status" dropdown menu (set to "Draft"), a "Supplier Location\*" dropdown menu, a "Requirement Description" text area, a "Document\*" field with a "Click or Drag to add a file" button, and a "Link to external document" field.
- Follow up:** Includes "Notification Date", "Date Archived", and "Request Date" fields.
- Other fields:** "Begin Date\*" and "Expiration Date\*" are also present.

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

Edit document : Supplier Documents

Save Close Archive

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

**Description**

Supplier

Document Type\*  
Supplier Documents / S4 - ES Certificate of Insurance (COI)

Status  
Draft

Document Name  
 en

Requirement Description

Document\*  
 Click or Drag to add a file

Link to external document

Document's owner

Validity

**Follow up**

Notification Date

Date Archived

Request Date

**Comments**

Add a comment here

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