

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 1 - Verify Global Supplier Record Data

Your Global Supplier Record contains your main supplier profile, which was 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.

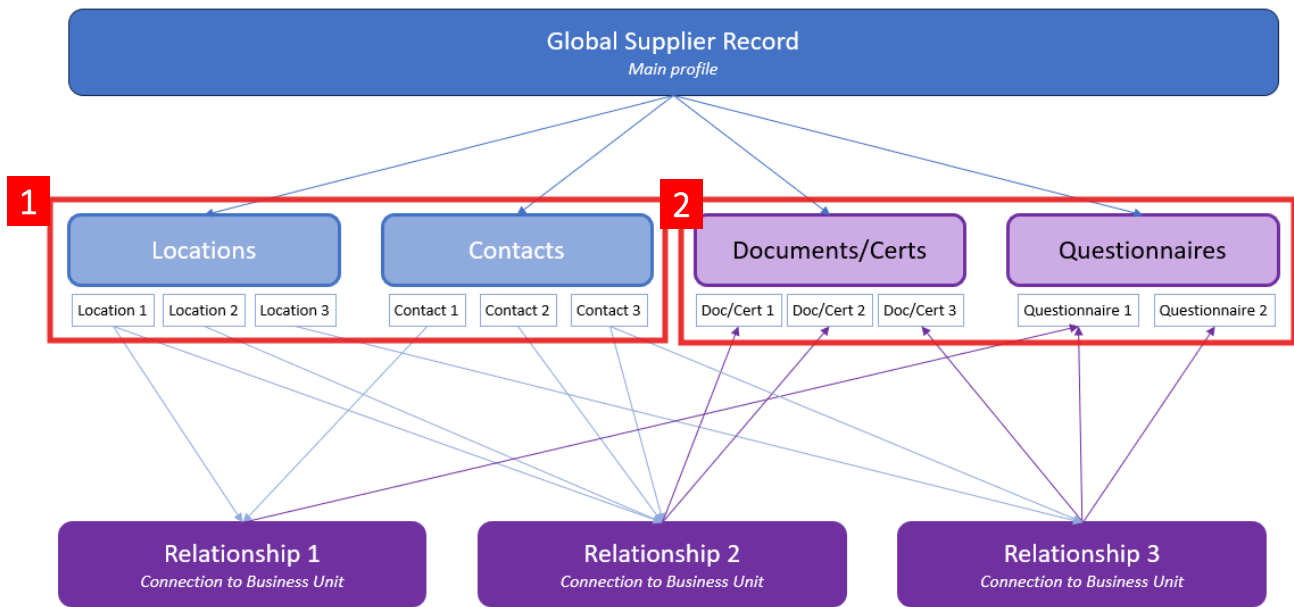
Understanding the Global Supplier Record and Relationships

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 a 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.

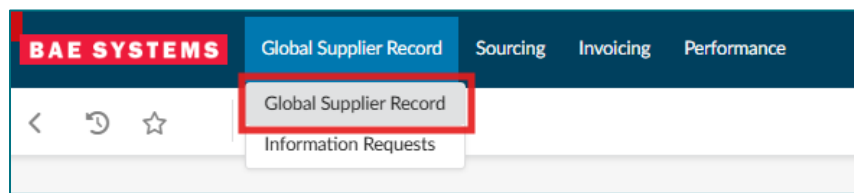


For this step, we will be focusing on updating the Locations and Contacts on the Global Supplier Record.

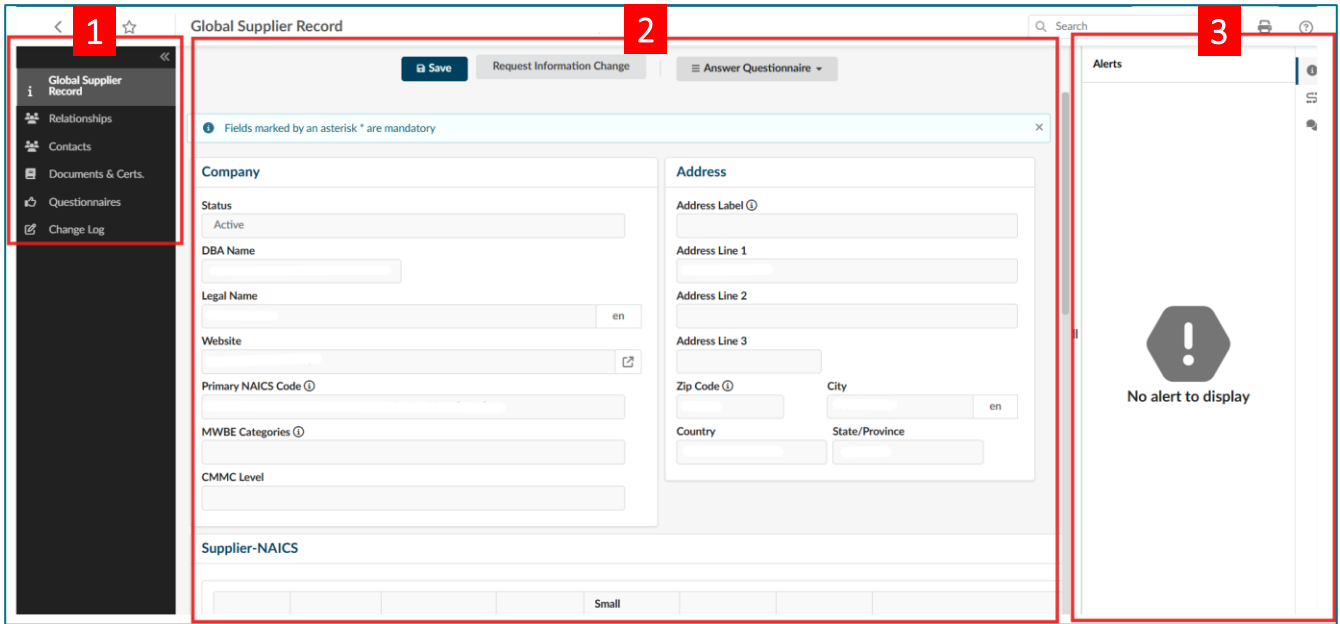
Please hold off on adding documents, certifications, and questionnaires at this step. You will receive your list of required attachments after confirming your Relationship in Step 2. Until then, no action is required on the Documents & Certs. and Questionnaires tabs.

Accessing your Record

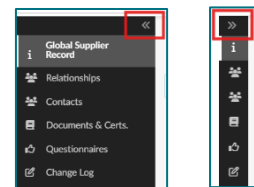
To access your record, click on the **Global Supplier Record** button in the header bar, and select the **Global Supplier Record** option in the dropdown menu.



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

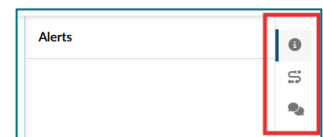


1. Main Menu – This section contains the main menu options for navigating your supplier record. You can expand and collapse this area using the arrow buttons.

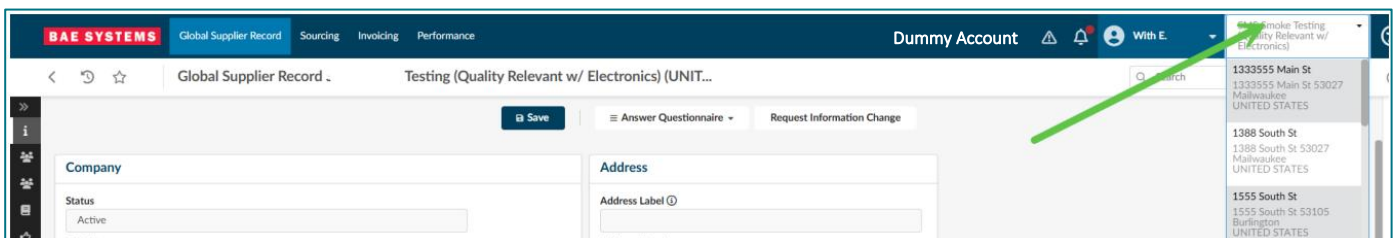


2. Record information – This section displays the information for the selected menu option.

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.

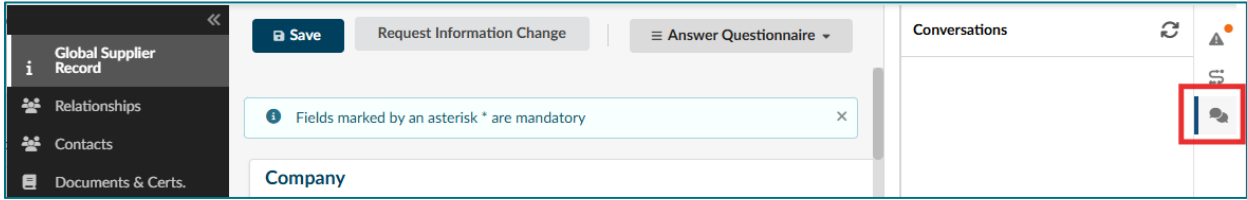


If you have multiple accounts and your menu options appear different from the ones shown above, you're likely viewing a Location record instead of the Global Supplier Record. To switch views, go to your Accounts List and select the option that corresponds to your company name.

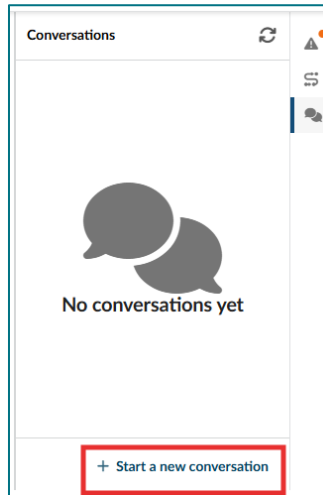


Communicating with BAE Systems

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.

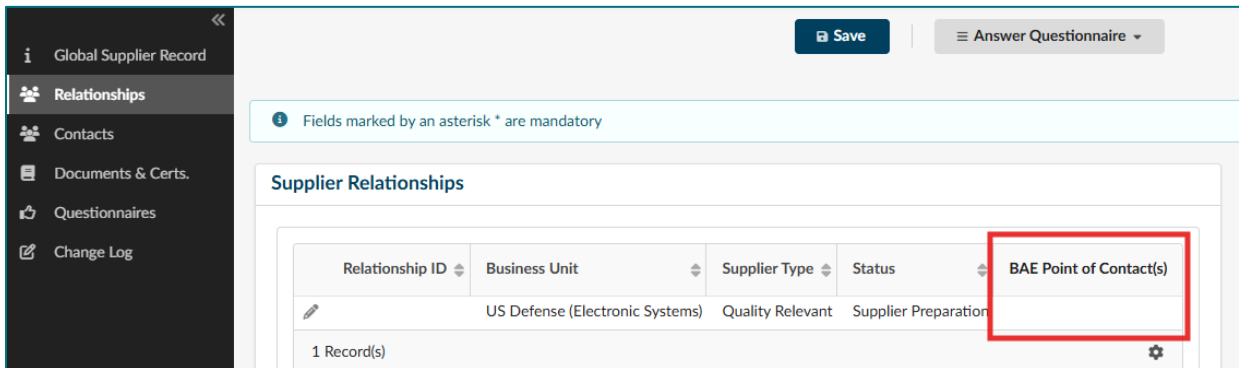


Selecting that icon will open the **Conversations** screen. If it is your first time starting a conversation on the selected record, you can click the **Start a new conversation** link to begin a new chat.

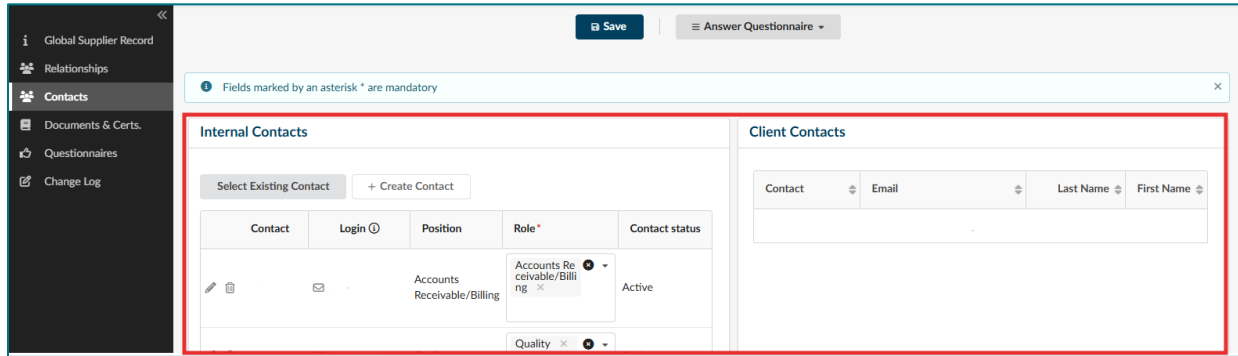


This will initiate a conversation with the BAE Systems Point of Contact(s) for your Relationship(s) and the contacts listed on your Contacts page.

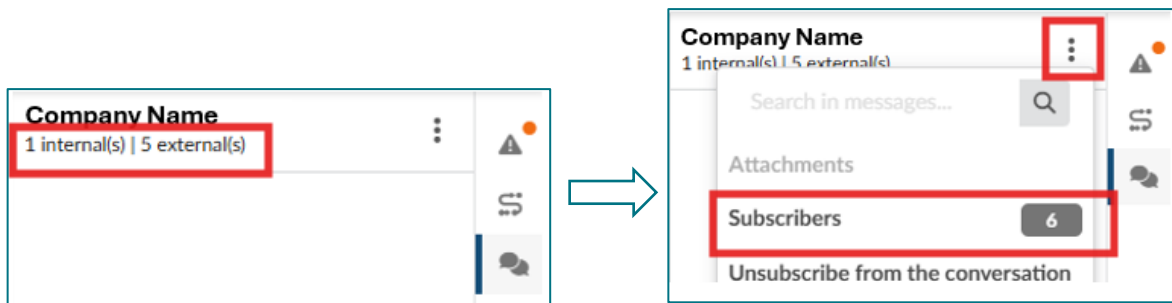
- To view your BAE Point of Contact(s), navigate to the **Relationships** screen of your Global Supplier Record



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



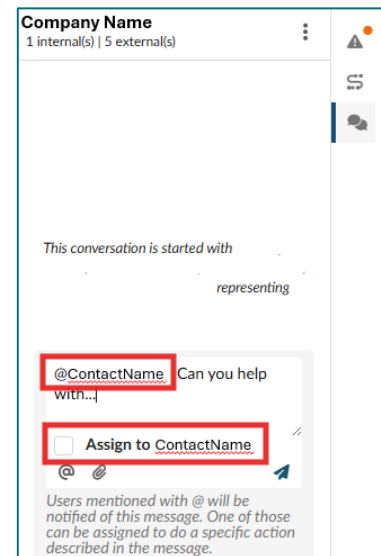
In the header of the conversation, you can see how many Internal (BAE Systems) and External (Supplier) contacts will have access to conversation. To view the full list of users, click on the vertical ellipses and select **Subscribers**.



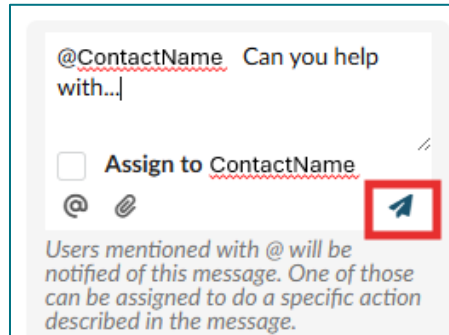
Important Note: If you do not see any internal users in the conversation, then you will not be able to contact a BAE Systems representative with this chat. Please email your BAE Systems representative so they can update your profile to use this chat feature.

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.

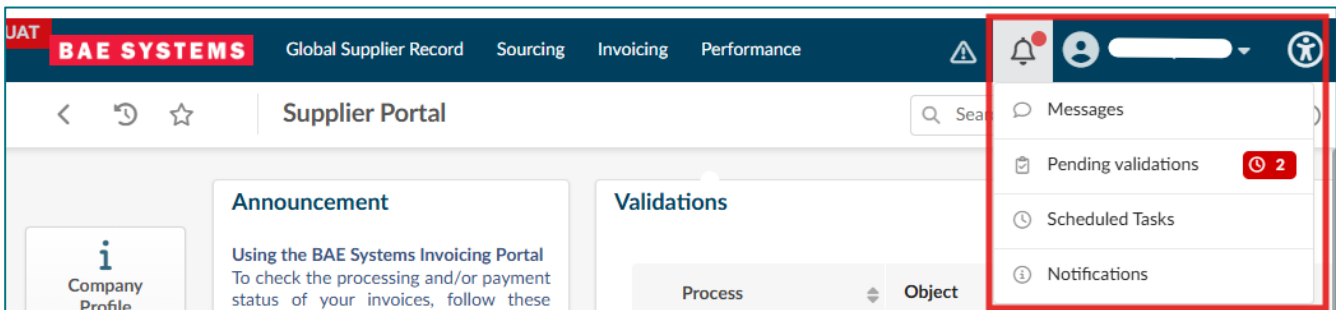
You can optionally choose to assign a task to a user who has been mentioned with @ by clicking the checkbox next to the **Assign To** field and selecting the contact name.



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).

Other Legal Information	Locations															
Legal Structure <input type="text" value="C Corporation"/>	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px; text-align: center;">Create Location</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Supplier</th> <th style="width: 30%;">Address Line 1</th> <th style="width: 15%;">Country</th> <th style="width: 15%;">State/Province</th> <th style="width: 20%;">City</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td>UNITED STATES</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td>UNITED STATES</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> </div>	Supplier	Address Line 1	Country	State/Province	City	<input type="text"/>	<input type="text"/>	UNITED STATES	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	UNITED STATES	<input type="text"/>	<input type="text"/>
Supplier		Address Line 1	Country	State/Province	City											
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Number of Employees <input type="text"/>																
Year Founded <input type="text"/>																

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.

Fields marked by an asterisk * are mandatory

Company	Address
Status <input type="text" value="Active"/>	Address Label ⓘ <input type="text"/>

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.

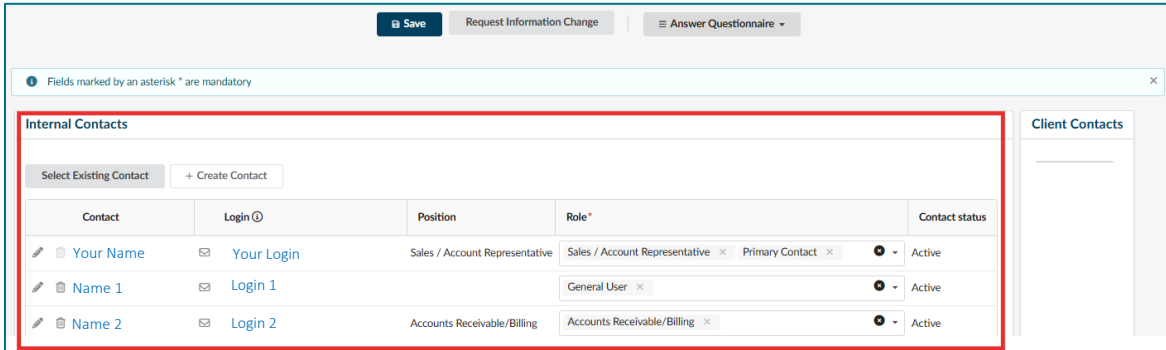
Fields marked by an asterisk * are mandatory

Reason for Change Request
 Reason for change request*

Company	Address
Status <input type="text"/>	Address Label ⓘ <input type="text"/>
DBA Name * <input type="text"/>	Address Line 1 <input type="text"/>
Legal Name <input type="text"/>	Address Line 2 <input type="text"/>
Website <input type="text"/>	Address Line 3 <input type="text"/>

Updating your Contacts

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

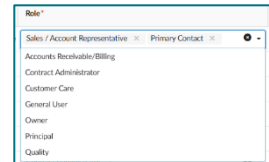


- First - review the list of existing contacts:

- 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.

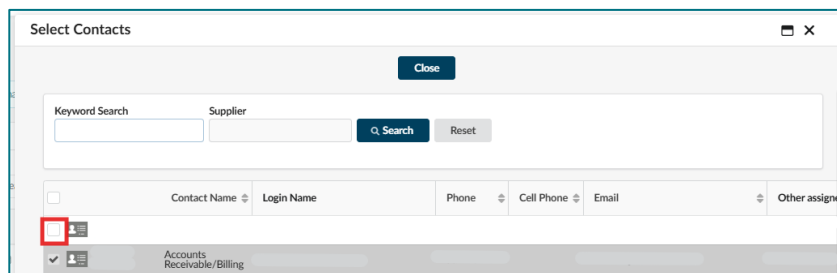
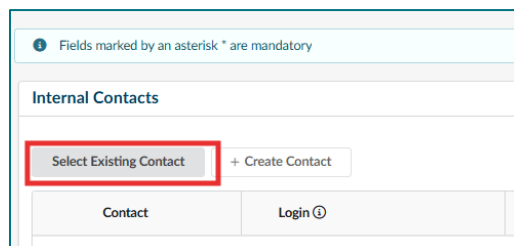


- To remove a contact, click on the trash can icon next to the person's name

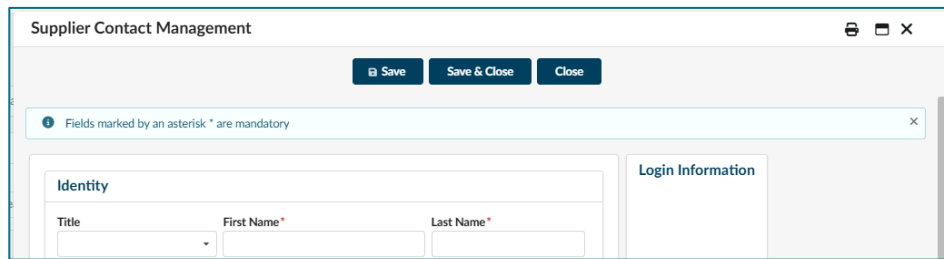
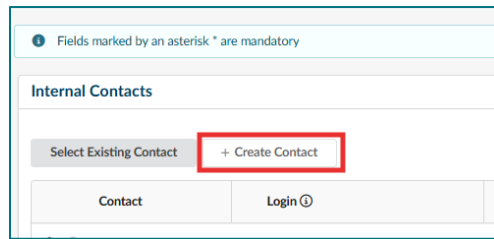


- Next - add any missing contacts to the list:

- 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.



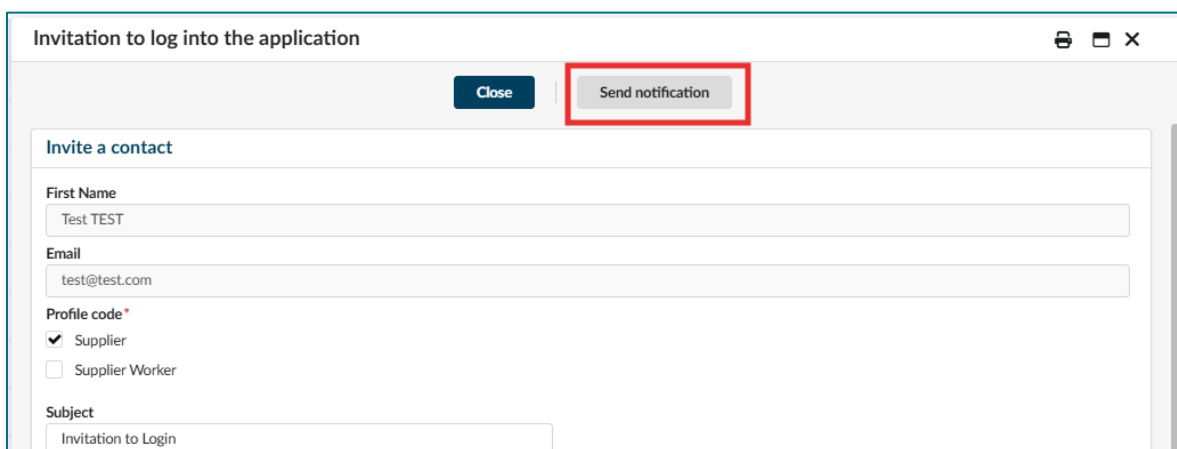
- If you do not find the contact you're looking to add, return to the Contacts menu and click the Create Contact button to open a menu for adding a new contact. Complete the required fields and then click the Save and Close button.



- 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.