

# Supplier Training Material

Borregaard Ivalua

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# 01. Supplier self registration

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# Supplier self registration (1/3)

## Self registration (1/3)

- 1 First, go to the Borregaard@Ivalua Portal, which can be found at [suppliers.borregaard.com](http://suppliers.borregaard.com)
- 2 You can change the language by clicking on the language dropdown menu in the top right corner of the screen
- 3 Click on the **New Supplier? Register Now** link, to register a new supplier through the self-registration page

The screenshot shows the Borregaard procurement portal login page. The browser address bar displays 'Borregaard' and the page title is 'Login'. The main content area is titled 'Welcome to Borregaard's procurement portal' and features an aerial photograph of a forest with a river. Below the photo, there is a paragraph of text explaining the portal's purpose and instructions for new and existing suppliers. On the right side, there is an 'IDENTIFICATION' section with a 'Login\*' field, a 'Password\*' field, and a 'Login' button. Below this is a 'Lost your password?' link. At the bottom right, there is a 'New Supplier? Register Now' link. A language dropdown menu in the top right corner is open, showing 'English' and 'Norsk' options. Three numbered annotations are present: '1' points to the Borregaard logo in the browser tab, '2' points to the language dropdown menu, and '3' points to the 'Lost your password?' link.



# Supplier self registration (2/3)

## Self registration (2/3)

- Enter the character as they appear in the captcha and click the **Submit** button  
NB: Does not need to be in capital letters.
- Under the **Company Information** section and **Address**, complete the mandatory fields which are marked with a red asterisk (\*)
- Fill in the **Organization Number** under Help us identify your company.  
NB: Note that the fields will depend on the country your organization is registered in. VAT number is mandatory for Norwegian organizations.

4

Please solve this captcha in order to continue.

I J V R

Enter the characters as they appear above \*

6

Help us identify your company

VAT Number ⓘ\*

VAT Number must have a value

DUNS

5

Register Cancel

Company information

Legal Name\*

Address

Address Label

Address Line 1 ⓘ

Address Line 2

Zip Code City en

Country\* State/Province

Map Satellite

NORTH AMERICA EUROPE ASIA

South America Africa Oceania

Atlantic Ocean Indian Ocean

Google Keyboard shortcuts Map data ©2024 Terms



# Supplier self registration (3/3)

## Self registration (3/3)

Under the **Contact Information** section, fill in the mandatory fields and create a password.

- 7 NB: The email address and password will be what you use to log in to the solution in the future

Select a category that describes your

- 8 business in the **First time registration? Tell us more** section

- 9 Enter the character as they appear in the captcha.

- 10 Click **Register** at the top of the screen

Once the registration has been reviewed by Borregaard, you will get an email notification when the registration has been approved, or if additional information is required

7

Contact Information

First Name\*

Last Name\*

Email\*

Position\*

 en

Password\*

Confirm password\*

- × Passwords should match.
- × The password must contain at least 1 uppercase character(s)
- × Password must contain at least 1 lowercase character(s)
- × Password must contain at least 1 digit(s)
- × Password must contain at least 1 non-alphanumeric character(s)
- × Password must contain at least 8 characters

8

First time registration ? Please tell us more

Regions Served

Categories

Comment

 en

9

SYSU

Enter the characters as they appear above\*

10

Register Cancel

A woman with long dark hair, wearing a white lab coat and a stethoscope, is looking through a light blue microscope. She is in a laboratory setting with a window in the background showing greenery. The image is partially obscured by a white text box on the left.

## 02. Accessing and navigating the Borregaard Ivalua Portal

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# First time login

## First time login

The login page for Borregaards procurement portal

1 To login, enter your login credentials and password in the **Identification**, and click on the **Login** button

2 If you have forgotten your password, click on the **Lost your password?** button

3 If you do not have the login and password details, please contact the person at your company who is responsible for your access to Borregaards procurement portal.

If you do not know this, or the person has left the company, contact Borregaard through the [procurement.portal@borregaard.com](mailto:procurement.portal@borregaard.com), providing your company's name, address and VAT number.

4 The first time you login to the system, you have to accept Borregaards general terms of use for the system, by clicking in the "I accept the terms and conditions" check box, and clicking on the **Acknowledge** button, before you can access the system.

Welcome to Borregaard's procurement portal

Through this portal suppliers and Borregaard can exchange information relating to Borregaard's procurement activities.

To gain access to the portal, please register through the **New Supplier** link on the right.

If your company is already registered, please contact your company's administrator for access to the portal.

If you need the name of your company's administrator please provide company name, address and VAT number through the e-mail on the right.

**IDENTIFICATION**

Login\*

Password\*

Login

Lost your password?

procurement.portal@borregaard.com

New Supplier? Register Now

You have to accept the terms and conditions in order to continue.

**Borregaard GDPR Compliance Statement**

Borregaard AS (here, «us» or «our») is committed to ensure the security and protection of the personal information that we process, and to provide a compliant and consistent approach to data protection. We have created this GDPR Compliance statement to explain our approach to implementing our GDPR compliance program. It describes the implementation of our data protection roles, policies, procedures, controls and measures to ensure ongoing compliance with GDPR.

**Our GDPR Principles**

Borregaard AS takes the privacy and security of individuals and their personal information very seriously. Our principles for processing personal information are:

- We will process all personal information fairly and lawfully
- We will only process personal information for specified and lawful purposes
- Where practical, we will keep personal information up to date
- We will not keep personal information for longer than is necessary

The website you are about to enter, will require registration and collection of the following personal information, to comply with legal and regulatory requirements related to Borregaard's business operations:

- Name
- Phone number
- Corporate E-mail address
- Login information
- IP Address

The data will be shared with Ivalua according to their Privacy policy, see [Privacy Policy Ivalua](#).

By entering this web service, you consent and accept the collection of personal information accordingly, if you do not accept: Please contact your Borregaard representative.

I accept the terms and conditions

Acknowledge Print



# The Home Page

## Home page overview

### Quick access

The quick access buttons can be used to directly access relevant actions, such as your own company profile, or proposing a collaboration plan

1

### Announcement

2 Displays useful information, links or announcements from Borregaard

### Onboarding Process

3 Displays the supplier registration process and relevant items requiring attention by the supplier.

### Indicators

4 Displays the number of active proposals, exceptions or collaboration plans you are involved in. Also provides a direct link

### Performance

5 Displays the performance score you have received from Borregaard

### Validations

6 Displays the list of tasks that the supplier is asked respond to within the system

The screenshot shows the Borregaard Supplier Portal interface. At the top, there is a navigation bar with the Borregaard logo and menu items: General Info, Requests & Auctions, and Performance & Collaboration. Below this is a breadcrumb trail: < Supplier Portal. The main content area is divided into several sections, each highlighted with a red box and a numbered callout (1-6):

- 1 Quick access:** A vertical sidebar on the left containing three buttons: 'Company Profile' (with an 'i' icon), 'Suggest Collaboration Plan' (with a gear icon), and 'Review Client' (with a star icon).
- 2 Announcement:** A text block containing a welcome message, a note about business terms, and contact information for the helpdesk: 'contact@valua.com' and 'Phone : +1 545 454 XXXX'.
- 3 Onboarding Progress:** A section showing the status of various onboarding steps: 'Registration' (Onboard Pending), 'Preparation' (Gather Information), 'Enrollment Rev.' (Review Information), and 'Active Supplier' (Onboard Complete). A central message states: 'There is no item requiring your attention at the moment.' with a green checkmark icon.
- 4 Indicators:** A vertical sidebar on the right showing four key metrics: 'Proposals in progress' (1), 'Exceptions' (5), and 'Collaboration Plans' (14).
- 5 Performance Scoring:** A section titled 'Extranet - Scoring' with the message: 'No data was found. Try changing the filter criteria.'
- 6 Validations:** A table listing tasks for the supplier to respond to. The table has columns for 'Process', 'Object', 'Action', and 'Due date'. One row is visible: 'Full Risk Assessment' (Object: 1303, Action: Gather Information).



# The Home Page

## Home page overview

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1

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- 4 Indicators:** A vertical column of four circular indicators: '1 Proposals in progress', '5 Exceptions', and '14 Collaboration Plans'.
- 5 Performance Scoring:** A section titled 'Extranet - Scoring' with the message: 'No data was found. Try changing the filter criteria.'
- 6 Validations:** A table with columns 'Process', 'Object', 'Action', and 'Due date'. It contains one row: 'Full Risk Assessment', '1303', 'Gather Information'. A link 'See 1 result' is visible in the top right corner of the table.



# Company Information (1/2)

## Company Profile: Company Information (1/2)

Once you've registered and logged in, you'll find yourself in the Supplier Portal. Here, the **Onboarding Progress** bar shows the status of your enrolment as a supplier, tracking your progress from registration to becoming an active supplier.

1

**Onboarding Progress** bar shows the status of your enrolment as a supplier, tracking your progress from registration to becoming an active supplier.

2

Go to **General Info** on top of the page

3

Click on **Company Profile**

**Borregaard** General Info Requests & Auctions Performance & Collaboration

Company Profile

Information Requests

Manage Sub-Tiers

Diversity Reports

**Company Profile**

**Suggest Collaboration Plan**

**Review Client**

**Onboarding Progress**

- ✓ **Registration**  
Onboard Pending
- ✓ **Preparation**  
Gather Information
- ✓ **Enrollment Rev.**  
Review Information
- ✓ **Active Supplier**  
Onboard Complete

There is no item requiring your attention at the moment.

1 Proposals in progress

5 Exceptions

14 Collaboration Plans



# Company Information (2/2)

## Company Profile: Company Information (2/2)

- The navigation tabs on the left side of the screen can be expanded/minimized by pressing the >> or << icon, respectively
- You can edit the information under the **Company and Address** section, if needed
- Click **Save** after making the necessary changes
- If you want to communicate with Borregaard, click on the **Speech bubble** icon at the left side of the Company Information screen.

The screenshot displays the Borregaard web application interface for editing company information. The page title is "Company Info Test Supplier (NORWAY / Ostfold / Sarpsborg)". The interface includes a navigation menu on the left, a main content area with "Company" and "Address" sections, and a "Map" section at the bottom. A red dashed box highlights the "Company" and "Address" sections, with a callout '5' pointing to the "Address" section. A blue callout '4' points to the navigation menu, and another blue callout '4' points to the expand/collapse icons. A blue callout '6' points to the "Save" button, and a blue callout '7' points to the speech bubble icon in the top right corner.

**Company Information**

- Legal Name: Test Supplier
- Website: [Empty]
- VAT Number: NO199999982MVA
- DUNS: 123456799
- Place Of Registration: [Empty]

**Address**

- Address Label: [Empty]
- Address Line 1: Korsgata 28
- Address Line 2: [Empty]
- Zip Code: 1723
- City: Sarpsborg
- Country: NORWAY
- State/Province: Ostfold

**Map**

Map showing location in Sarpsborg, Norway. Landmarks include Lille Saigon, Korsgata, Storgata, and St. Olav videregående skole.



# Communicating with Borregaard

## Company Profile: Communicating with Borregaard

Borregaards Ivalua solution allows you to communicate with Borregaard through a chat function.

- 1 You can show or hide the **Conversation** window by clicking the **speech bubble** icon.
- 2 Click on **+ Start a new conversation** to begin a chat
- 3 Type your message in the message box
- 4 Click on the **Blue paper plane** icon to send the message. Your Borregaard contacts listed in the **Contacts** tab will be notified that you have sent a message
- 5 You can attach a file by clicking on the **paperclip** icon
- 6 You can **@ mention** a user, as long as the user is listed in the **Contacts** tab
- 7 The size of the window can be altered by dragging the left line of the window

The screenshot displays the Ivalua interface for a company profile. On the left, a sidebar lists navigation options: Company Information, Contacts, Documents & Certs., Financial Indicators, Qualifications, and Change Log. The main area shows the 'Company' profile for 'Test Supplier' with fields for Legal Name, Website, VAT Number, DUNS, and Place Of Registration. To the right, the 'Address' section includes fields for Address Label, Address Line 1, Address Line 2, Zip Code, and City. A map of Sarpsborg is visible. A chat window is overlaid on the bottom right, containing a message: 'Test Supplier has been added to the supplier contact list and participate now in the conversation. This conversation is started with Aadne AAS representing Test Supplier'. Below the message is a text input field with the placeholder 'This is a message to Borregaard'. The chat window has a red dashed border and is annotated with numbers 3, 4, 5, and 6. A red box highlights the '@' and paperclip icons. A red box highlights the blue paper plane icon. A red box highlights the left edge of the chat window. A red box highlights the '+ Start a new conversation' button at the bottom right of the chat area, annotated with number 2. A red box highlights the speech bubble icon in the top right corner of the interface, annotated with number 1. A red box highlights the vertical line on the left side of the chat window, annotated with number 7.



# Adding internal contacts

## Company Profile: Adding internal contacts

Borregaards Ivalua solution allows you to add additional users, who can get access to the portal, and participate in proposals

- 1 Navigate to the **Contacts** tab on the left to add contacts to the sourcing project
- 2 Click **+ Create Contact** to add a new contract
- 3 Fill in the mandatory fields and click **Save & Close**
- 4 You can select a **role** to the contact by clicking on the drop-down list
- 5 Another way to add a contact is by selecting existing contact by clicking on **Select Existing Contact**
- 6 Use the search bar to locate the contact and then check the box next to their name. Once you've selected the contact, click **Close** to confirm your selection
- 7 Click **Save** after adding the relevant contact

Company Info Exception Test Supplier (NORWAY / Ostfold / Sarpsborg)

Company Information

Contacts

Documents & Certs.

Financial Indicators

Qualifications

Change Log

Internal Contacts

+ Create Contact

Select Existing Contact

Contact	Login	Position	Role	Contact status
Aas Aadne	Aadne.Aas@exception.no		Supplier Admin	Active

Client Conta

Contact

Gøran Flakne

Save

Supplier Contact Management

Save Save & Close Close

Identity

Title First Name\* Last Name\*

Email\* Position Internal Identifier

List of languages English

Phone

Phone Cell Phone Fax

Photo Add a picture

Address

Address Label

Address Line 1 Korskata 28

Address Line 2

Zip Code 1723 City Sarpsborg

Country NORWAY State/Province Ostfold

Longitude 11.1038514

Latitude 59.2834301

Supplier Admin

- Accountant
- CEO
- Quality Manager
- Recruiter
- Sales
- Sustainability
- Technician

Select Contacts

Close

Keywords Supplier Search Reset

	Contact Name	Phone	Cell Phone	Email	Other assigned suppliers
<input checked="" type="checkbox"/>	Aas Aadne	123456789		Aadne.Aas@exception.no	Exception Test Supplier

1 Record(s)



# Adding documents and certifications

## Company Profile: Adding documents and certifications

You can add documents, such as quality management documentation (ISO 9001, etc); Energy management certifications (ISO 50001 or similar) and health and safety documents (ISO 45001 etc)

1 Navigate to the **Documents & Certs.** tab on the left

You have the option to upload any necessary documents and certifications. For instance, you can click on **Add Quality** to upload any ISO 9001 certification or similar quality document

Fill in the mandatory fields and Add the certification or document in the **add a file**.

3 The **Begin Date** is mandatory, and a default expiration date will be calculated from this, unless another **Expiration Date** is added

4 Click **Save & Close**

The screenshot illustrates the user interface for adding documents and certifications. It is divided into several sections:

- Navigation:** A sidebar on the left contains tabs for 'Company Information', 'Contacts', 'Documents & Certs.' (highlighted with a red box and a '1' in a blue circle), 'Financial Indicators', 'Qualifications', and 'Change Log'.
- Search and Filters:** The top right of the main area features a search bar and filters for 'Keywords', 'Status', 'Archived Documents', and 'Missing Required Documents'. Buttons for 'Save', 'Answer Questionnaire', and 'Request Information Change' are also present.
- Document Categories:** The main content area is organized into sections: 'Governance (Compliance & Sustainable Procurement)', 'Quality', and 'Environmental'. Each section has an 'Add' button (e.g., 'Add Governance', 'Add Quality', 'Add Environmental') highlighted with a red box and a '2' in a blue circle.
- Document List:** Below each category is a table listing existing documents with columns for 'Att.', 'Document Type', 'Document Name', and 'Begin Date'. For example, under 'Quality', there is one record for 'Certified Information Security'.
- Edit Document Form:** A modal window titled 'Edit document : Quality' is shown, containing a form with the following fields:
  - Description:** Document Type\* (dropdown), Status (Draft), Document Name, Begin Date\* (calendar), Document\* (file upload), Expiration Date (calendar), Link to external document, Document's owner (AAS Aadne), and Validity.
  - Follow up:** Notification Date, Date Archived, and Request Date (all with calendar icons).
  - Comments:** A text area for adding comments.Buttons for 'Save', 'Save & Close' (highlighted with a red box and a '4' in a blue circle), 'Close', and 'Archive' are at the top right of the form. A '3' in a blue circle highlights the form fields.





# The onboarding process (1/2)

## Company Profile:

### The onboarding process (1/2)

- 1 Click on the **Borregaard logo** on the left top side to navigate back to the homepage  
Once a supplier is created and onboarding starts, the Onboarding Progress table will advance to the next step, which is
- 2 **Enrollment Review**. At this point, the Category manager at Borregaard must approve the supplier to activate the supplier in the system.  
If there are items that require your attention as part of the onboarding process, these will be clearly displayed
- 3 Any validations, such as completion of the onboarding risk assessment, will be listed in the **Validations** section
- 4 Once the Supplier Manager or Procurement Advisor has activated the supplier, the onboarding process is complete and the supplier is now considered an active supplier. At this point, the Onboarding
- 5

The screenshot shows the Borregaard Supplier Portal interface. At the top left, the Borregaard logo is highlighted with a red box and a circled '1'. The navigation menu includes 'General Info.', 'Requests & Auctions', and 'Performance & Collaboration'. The main header is 'Supplier Portal'. On the left sidebar, there are three buttons: 'Company Profile', 'Suggest Collaboration Plan', and 'Review Client'. The main content area is divided into three sections: 'Announcement', 'Onboarding Progress', and 'Performance Scoring'. The 'Onboarding Progress' section shows a list of steps: 'Registration Onboard Pending', 'Preparation Gather Information', 'Enrollment Review Information', and 'Active Supplier Onboard Complete'. A red dashed box highlights the 'Registration' and 'Preparation' steps, with a circled '2' next to it. A yellow warning box with a red border and a circled '3' contains the message: 'The following items require your attention: Missing Mandatory Document(s) There is/are missing required document(s) to be uploaded.' The 'Performance Scoring' section shows 'Extranet - Scoring' with the message 'No data was found. Try changing the filter criteria.' At the bottom right, a table with columns 'Process', 'Object', 'Action', and 'Due date' is shown. A red box highlights a row with a circled '4': 'Full Risk Assessment', 'Supplier Onboarding Questionnaire - Test Supplier', 'Gather Information', and an empty 'Due date' cell.



# The onboarding process (2/2)

## Company Profile: The onboarding process (2/2)

5

Once Borregaard has approved the supplier onboarding, the onboarding process is complete and the supplier is now considered an active supplier. At this point, the Onboarding Progress table will advance to the final stage

The screenshot displays the Borregaard Supplier Portal interface. At the top, the Borregaard logo is on the left, and navigation links for 'General Info.', 'Requests & Auctions', and 'Performance & Collaboration' are on the right. Below the navigation bar, the page title 'Supplier Portal' is centered. On the left side, there are three utility buttons: 'Company Profile', 'Suggest Collaboration Plan', and 'Review Client'. The main content area is divided into several sections. The 'Announcement' section contains three paragraphs of text, including contact information for 'ivalua.com'. The 'Onboarding Progress' section features a table with four rows, each with a green checkmark and a status: 'Registration Onboard Pending', 'Preparation Gather Information', 'Enrollment Rev. Review Information', and 'Active Supplier Onboard Complete'. A red box highlights this table, and a blue circle with the number '5' is positioned above it. To the right of the table, a green clipboard icon is accompanied by the text 'There is no item requiring your attention at the moment.' Below the main content, there are two more sections: 'Performance Scoring' which shows 'Extranet - Scoring' and 'No data was found. Try changing the filter criteria.', and 'Validations' which contains a table with columns for 'Process', 'Object', 'Action', and 'Due date', each with a dropdown arrow.

**Borregaard** General Info. Requests & Auctions Performance & Collaboration

< ↻ ☆ Supplier Portal

**Company Profile**

**Suggest Collaboration Plan**

**Review Client**

**Announcement**

You have now logged onto our supplier portal. This portal is the one-stop shop for all of your business transactions with us.

Please note that in doing business with us, you agree to abide by the supplier code of conduct and policies we uphold.

If you encounter any issues, you may consult this [LINK for a list of our video FAQs](#). You may also contact our helpdesk directly for assistance at :  
**contact@ivalua.com**  
**Phone : +1 545 454 XXXX**

**Onboarding Progress**

5

✓	<b>Registration</b> Onboard Pending
✓	<b>Preparation</b> Gather Information
✓	<b>Enrollment Rev.</b> Review Information
✓	<b>Active Supplier</b> Onboard Complete

There is no item requiring your attention at the moment.

**Performance Scoring** ⓘ

Extranet - Scoring

No data was found. Try changing the filter criteria.

**Validations**

Process	Object	Action	Due date
---------	--------	--------	----------



# 03. Proposals

---

03.1. New proposals and accessing proposals



# New proposals and accessing proposals

## Proposals:

### New proposals and list of proposals

If you, or another registered user from your company, is invited by Borregaard to participate in a proposal, you will receive a notification through email. The email contains a link to the proposal.

There are two ways of accessing the list of active and new proposals from the homepage:

- 1 Go to **Request & Auctions** in the main menu and click on **Manage Proposals**
  - 2 Click on the **Proposals in progress** indicator
  - 3 To access a proposal, click on the **Pencil** icon to the left of the proposal.
- Any new proposal will have a RED traffic light, and the text **Awaiting acknowledgment**.

The screenshot shows the Borregaard Supplier Portal homepage. The user is logged in as Aadne A. The main menu includes 'General Info.', 'Requests & Auctions', 'Performance', and 'Collaboration'. The 'Requests & Auctions' menu is expanded, showing 'Manage Proposals', 'Manage Auctions', and 'Manage early Contract Document'. The 'Manage Proposals' option is highlighted with a red box and a blue circle containing the number 1. On the right-hand side, there is a navigation pane with several indicators: 'Proposals in progress' (1), 'Exceptions' (5), and 'Collaboration Plans' (14). The 'Proposals in progress' indicator is highlighted with a red box and a blue circle containing the number 2. The main content area shows an announcement, a progress bar with four steps (Registration, Preparation, Enrollment Rev., Active Supplier), and a message stating 'There is no item requiring your attention at the moment.'

The screenshot shows the 'Manage Proposals' page. The user is logged in as Aadne A. The page title is 'Manage Proposals'. There are search filters for 'Keywords', 'Proposal Progress', and 'RFx Status'. The 'RFx Status' filter is set to 'Open for Bidding' and 'On Hold'. A 'Search' button and a 'Reset' button are visible. Below the filters is a table with the following columns: Proposal Progress, Sourcing Project, Lot #, Round #, RFx Name, RFx Status, Remaining Time, Begin (UTC+2), End (UTC+2), My Bid, and Forum. The first row of the table is highlighted with a red box and a blue circle containing the number 3. The first row contains the following data: Proposal Progress: Awaiting Acknowledgment (with a red traffic light icon), Sourcing Project: BPM000233, Lot #: 1, Round #: 1, RFx Name: New sourcing project, RFx Status: Open for Bidding, Remaining Time: 20d 11h 39min 02s, Begin (UTC+2): 28.08.2024 11:19:23, End (UTC+2): 18.09.2024 00:00:00, My Bid: 0,00 NOK, and Forum: [icon].



# 03. Proposals

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## 03.2. Respond to and submit a proposal



# Responding to a proposal (1/6)

## Proposals: Respond to and submit a proposal

When you have opened the new proposal, you need to acknowledge if you plan to submit a bid, or if you do not plan to submit a bid

1 Click on the button **I acknowledge receipt of this RFx**

2 Select your respond that you intent to respond to the RFx, and click on the **Submit** button

3 If you select that you do not intend to bid, you are asked to provide a reason – this is optional

Borregaard General Info. Requests & Auctions Performance & Collaboration

New sourcing project (BPM000233) - Lot : 1 / Round : 1

Save Download all contents of this RFx

Overview

Info

Discussions

History

My Team

Remaining time : 20d 11h 29min 12s - ⚠ No proposal has been submitted

**Acknowledgement**

To answer to this RFx, please acknowledge receipt

I acknowledge receipt of this RFx

**RFx General Information**

Code  
BPM000233

RFx Name  
New sourcing project

Lot #  
1

Round #  
1

Begin  
28.08.2024 11:19:23 (UTC+2)

End  
18.09.2024 00:00:00 (UTC+2)

Summary

**RFx Documents**

0 Record(s)

**Early Contract Documents**

Connector\*

0 Record(s)

**RFx Links**

**Receipt acknowledged on 12.09.2024 15:45:02 (UTC+2)**

To answer to this RFx, please confirm that you intend to bid.\*

WILL BID: our intent is to respond to this RFx.

NO BID: we will not be able to respond to this RFx.

Submit

**Receipt acknowledged on 12.09.2024 15:45:02 (UTC+2)**

To answer to this RFx, please confirm that you intend to bid.\*

WILL BID: our intent is to respond to this RFx.

NO BID: we will not be able to respond to this RFx.

Reason

Submit



# Responding to a proposal (2/6)

## Proposals:

### Respond to and submit a proposal

4 Navigate to the **Info** tab on the left

You can give your proposal a title, and add an end date for how long your proposal is valid, and write a description under the **General Information** section

5

Any documents you want to include in your proposal needs to be added in the **Supplier Documents** section

6

The screenshot shows a web interface for responding to a proposal. On the left, a navigation menu includes 'Overview', 'Info', 'Questionnaire', 'Item', 'Discussions', 'History', and 'My Team'. The 'Info' tab is selected and highlighted with a red box and a blue circle containing the number 4. At the top right, there are buttons for 'Save', 'Download all contents of this RFx', 'Validate & Submit Proposal', and 'Cancel Proposal'. A status bar indicates 'Remaining time : 20d 11h 08min 56s - No proposal has been submitted'. Below this, there are three main sections: 'Acknowledgement' (showing 'Submission acknowledged on 28.08.2024 at 12:32'), 'General Information' (highlighted with a red box and a blue circle containing the number 5), and 'Supplier Documents' (highlighted with a red box and a blue circle containing the number 6). The 'General Information' section contains a 'Label\*' field with 'Proposal # 1', a 'Validity End' date picker, and a 'Description' text area. The 'Supplier Documents' section has a 'Click or Drag to add files' button.



# Responding to a proposal (3/6)

## Proposals: Respond to and submit a proposal

- 7 Navigate to **Questionnaire** tab on the left  
The **Overview** shows the sections, and the number of questions in the questionnaire.
- 8 Once you start answering the questions, the number before the / will change, indicating how many questions you have responded to in that section
- 9 Click **Access Questionnaire** or the sections on the left to answer the question(s) that is part of the bidding
- 10 You may also download the questionnaire to excel, complete your answers in excel and upload via the 'Click and Drag to add file'

Borregaard General Info. Requests & Auctions Performance & Collaboration

New sourcing project (BPM000233) - Lot : 1 / Round : 1

Overview

Info

**Questionnaire**

Item

Discussions

History

My Team

Save Download all contents of this RfX Validate & Submit Proposal Cancel Proposal

Remaining time : 20d 11h 07min 01s - No proposal has been submitted

**Overview**

General Information 0 / 4

Technical requirements 0 / 2

**Overview**

Supplier Exception Test Supplier

Organization Answered by Gynnild Gøran Flakne

Commodity L1 Indirect

**Answer Questionnaire**

Access Questionnaire OR

Download in Excel 2007-2010 format (xlsx)

Download in Excel 97-2003 format (xls)

Click or Drag to add a file





# Responding to a proposal (4/6)

## Proposals: Respond to and submit a proposal

- 11 You can navigate between the sections of the questionnaire in the tabs to the left of the questions
- 12 Mandatory questions are marked with a red asterisk \*
- 13 The **Next** button at the bottom of the questionnaire will navigate you to the next section

The screenshot displays the Borregaard procurement portal interface for a new sourcing project (BPM000233) - Lot : 1 / Round : 1. The page features a navigation menu on the left with tabs for Overview, Info, Questionnaire, Item, Discussions, History, and My Team. The main content area shows a questionnaire with two sections: General Information (0/4) and Technical requirements (0/2). The General Information section contains three mandatory questions, each with an 'Answer\*' input field. The 'Next' button is located at the bottom right of the questionnaire. Red annotations highlight the 'General Information' tab, the 'Answer\*' input fields, and the 'Next' button.



# Responding to a proposal (5/6)

## Proposals: Respond to and submit a proposal

- 14 Navigate to the **Item** tab on the left
- 15 The **Currency** field allows you to choose the currency you want to bid in  
Under the Response section, enter the price and other input required, like price of Installation, Transport, 3<sup>rd</sup> party and documentation.
- 16 All mandatory fields are marked with a red asterisk \*
- 17 **NB:** Be aware, the item price grid can vary, depending on the request setup. You may download the item grid in excel format, complete your answer in excel, and upload via the 'Drop your quotation form'

The screenshot shows the Borregard web application interface for responding to a proposal. The page title is "New sourcing project (BPM000233) - Lot : 1 / Round : 1". The interface includes a navigation menu on the left with tabs for Overview, Info, Questionnaire, Item (highlighted with a red box and circled 14), Discussions, History, and My Team. The main content area has a top bar with buttons for Save, Download all contents of this RFx, Validate & Submit Proposal, and Cancel Proposal. Below this is a status bar showing "Remaining time : 20d 10h 41min 55s - No proposal has been submitted". The "Export / Import" section (circled 17) offers options to download the item grid in Excel 2007-2010 (xlsx) or Excel 97-2003 (xls) format, and a drop zone for uploading a quotation form. The "Currency" field (circled 15) is set to NOK, and the "Total" field shows "Total per currency". The "Keywords" section includes a search box and a "Show unanswered items only" checkbox. The "Response" section (circled 16) displays a table with columns for Code, Type, Label, Quantity, and various cost categories: Equipment\*, Installation\*, Transport\*, Scaffolding / lift / crane\*, Documentasjon\*, 3.party\*, and NDT\*. The table contains two rows of data for items I3\_1 and I3\_2. The "Equipment\*" column for I3\_1 has a text input field.

Code	Type	Label	Quantity	Equipment*	Installation*	Transport*	Scaffolding / lift / crane*	Documentasjon*	3.party*	NDT*
I3_1	Required Item	Second item	20,00	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
I3_2	Required Item	Third item	10,00	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



# Responding to a proposal (6/6)

## Proposals: Respond to and submit a proposal

18 Click on **Validate & Submit Proposal** on top of the page to submit the proposal

A summary of your response will be displayed in the popup

19 Click on **Submit my proposal**

Note, that you can, at any time before the proposal is submitted, cancel your proposal by pressing the **Cancel Proposal** button

**Note:** It is very important that you remember to validate & submit your proposal, as your proposal is not considered valid until this has happened

Overview

Info

Questionnaire

Item

Discussions

History

Save

Download all contents of this RFX

Validate & Submit Proposal

Cancel Proposal

Remaining time : 20d 10h 29min 27s - ⚠ No proposal has been submitted

RFX General Information

Code  
BPM000233

RFX Documents

Title	Type	Att.	Contact	Last Modification (UTC+2)
-------	------	------	---------	---------------------------

Do you really want to submit your proposal?

Once an offer is submitted, it cannot be modified. You will only be able to create a new one.

- 2 / 2 items have been filled.
- 6 / 6 questions have been filled.
- Total number of attached documents: 0

Cancel

Submit my proposal

# 03. Proposals

03.3. Adding team members to a proposal



# Adding team members to a proposal

## Proposals:

### Adding team members to a proposal

- 1 Navigate to **My Team** tab on the left

My Team allows you to add contacts which give them access to the RFx

*Note: All the selected contacts can modify and submit the response to the proposal*

- 2 Select an existing contact by clicking on the 'Select contact' dropdown

- 3 If you need to register a new user for your colleague, click on 'Create a new contact'

- 4 **Complete the form** – as a minimum add first & last name, and the email address of the new team member and click **Save & Close**

- 5 Click **Save & Close**

- 6 Click the **Key icon** to and send a **login activation** email to your colleague

Your colleague will have to login, using the details in the email sent, to create a password, before they can log in

Unable to answer some questions of this RFx?  
Get help from your colleagues!

Invite your colleagues and give them access to this RFx.  
You can choose from the contacts already identified on this portal, or easily create a new contact to invite a colleague.

Note:  
All selected contacts can modify and submit your answer. They will only have access to this RFx.  
New contact creation may require your buyer approval for account creation

Select Contact or Create a new contact

Name	Email
AAS Aadne	Aadne.Aas@exception.no

1 Record(s)

Supplier Contact Management

Save Save & Close Close

Identity

Title First Name\* Last Name\*

Email\* Position ⓘ Internal Identifier

List of languages

English

Phone

Phone Add a picture

Invitation to log in

Close Send message

Invite a contact

First Name  
Brian BRAADE

Email  
bb@exception.no

Profile code\*  
✓ Supplier

Subject  
Access to Ivalua Buyer

Notification body

Dear Brian Braads:  
You have just been given access to the Ivalua application for supplier Exception Test Supplier with the following user ID: bb@exception.no.  
You must create your password by accessing the following page: Set password.  
You will then be allowed to log in to Ivalua: Login.

# 03. Proposals

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## 03.4. Ask questions and request clarifications



# Asking questions and requesting clarifications

## Proposals:

### Ask questions and request clarifications

#### 1 Navigate to the Discussions tab on the left

This section allows you to send message to the owner of the proposal at Borregaard, and to see earlier messages that you have sent, or messages which have been sent to you in relation to this proposal

#### 2 Click the **Compose** button to create a new message

#### 3 Make sure to always send your messages to Procurement Responsible (Sourcing Project)

#### 4 Select a message type and fill in the subject and the message body. You can also attach a file with the message.

#### 5 When the message is ready, click **Send**

The screenshot displays the 'Discussions' tab in the system interface. The left sidebar shows the navigation menu with 'Discussions' highlighted. The main content area shows a 'Compose' button and a 'Message History' button. A red box highlights the 'Discussions' tab, and a blue circle with the number '1' is next to it. Another red box highlights the 'Compose' button, and a blue circle with the number '2' is next to it. A third red box highlights the 'Send To' dropdown menu, and a blue circle with the number '3' is next to it. A fourth red box highlights the 'Send' button, and a blue circle with the number '4' is next to it. A fifth red box highlights the 'Send' button, and a blue circle with the number '5' is next to it. The 'Send To' dropdown menu is set to 'Responsible (Sourcing Project)'. The 'Message Type' dropdown menu is set to 'Clarification'. The 'From' field is 'Aas Aadne'. The 'Subject' field is empty. The 'Send' button is green and the 'Cancel' button is red.

# 03. Proposals

03.5. Replace & submit new proposal





# Replace & submit new proposal

## Proposals:

### Replace & submit new proposal

On an exiting proposal you have submitted:

- 1 Click on **Create a new proposal** on top of the page to replace the old proposal
- 2 Go to the **Info** Tab
- 3 Give the proposal a new name
- 4 Select if you want to submit an **alternate proposal** or **replace existing proposal**
- 5 Select proposal to replace (if applicable)

Note: Be aware, if you select a proposal to replace you need to ensure that you submit your new proposal – otherwise you will not submit any proposal

The screenshot displays the Borregaard procurement system interface for a 'New sourcing project (BPM000233) - Lot : 1 / Round : 1'. The interface includes a navigation menu on the left with 'Info' highlighted (2). The main content area shows a 'Create a new proposal' button (1) and a 'Save' button. A notification bar indicates 'Remaining time : 20d 07h 56min 51s - ⚠️ Current proposal has not been submitted'. The 'General Information' section is expanded, showing 'Label' (3) set to 'Proposal # 2', 'Answer type' (4) set to 'Replace existing proposal', and 'Replaced proposal' (5) set to 'Proposal # 1'. The 'Supplier Documents' section is also visible.



## 04. Maintaining supplier information

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### 04.1. Request information change



# Request information change (1/2)

## Maintaining Supplier information: Request information change

Once your company information has been registered, and the onboarding is complete, the information is locked, to avoid accidental changes.

If you need to change any of the information in the **Company Information**, you can initiate a **Request Information Change**.

- 1 Navigate to the **Company Profile**, under the **General Info** in the main menu
- 2 Go to the **Company Information**
- 3 Press the **Request Information Change** button

The screenshot shows the Borregaard supplier profile page for 'Supplier (NORWAY / Ostfold / Sarpsborg)'. The page is divided into several sections: 'General Info.', 'Requests & Auctions', and 'Performance & Collaboration'. The 'Company Profile' section is highlighted with a red box and a blue circle labeled '1'. Below this, the 'Company Information' section is highlighted with a red box and a blue circle labeled '2'. The 'Request Information Change' button is highlighted with a red box and a blue circle labeled '3'. The page also features a 'Save' button, an 'Answer Questionnaire' button, and a 'Request Information Change' button. The 'Company' section contains fields for 'Legal Name' (Test Supplier), 'Website', and 'VAT Number'. The 'Address' section contains fields for 'Address Label', 'Address Line 1' (Korsgata 28), and 'Address Line 2'.



# Request information change (2/2)

## Maintaining Supplier information: Request information change

The **Company Information** page changes, to allow you to make the necessary changes

4 Make any relevant changes to the **Company** and **Address** sections

Type in the **Reason for change request** (mandatory), describing the reason for the change, and what you want to modify

6 Press the **Submit for Approval** button

The request for change will be sent to Borregaard, who will review and approve the change.

Borregaard

General Info. Requests & Auctions Performance & Collaboration

Company Change Request Test Supplier (NORWAY / Ostfold / Sarpsborg)

Save Cancel Submit for Approval

Reason for Change Request

Reason for change request\*

Company

Legal Name\* Test Supplier

Website

VAT Number\* NO199999982MVA

DUNS 123456799

Place Of Registration

Address

Address Label

Address Line 1 Korsgata 28

Address Line 2

Zip Code 1723

City Sarpsborg en

Country NORWAY State/Province Ostfold

Map Satellite

Lille Saigon St. Olavs gravlund Sarpsborg



# 04. Maintaining supplier information

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## 04.2 Financial indicators



# Financial Indicators

## Maintaining Supplier information: Financial indicators

Borregaard asks that you supply any relevant financial indicators in your supplier portal.

While not mandatory, Borregaard may enter this information, and you may increase the accuracy of the information, by updating this.

- 1 Navigate to the **Financial Indicators** tab in the Company Information.
- 2 Select the year that you wish to update the figures for
- 3 Input the relevant figures, including the currency/unit appropriate
- 4 Click on the **Save** button

General Info. Requests & Auctions Performance & Collaboration

Company Info Test Supplier (NORWAY / Ostfold / Sarpsborg)

1 **Financial Indicators**

4 **Save**

Refusal saved

### Indicators

Code	Values of financial indicators	Units
Revenue	<input type="text"/>	EUR <input type="button" value="x"/> ▾
Capital	15,00	EUR <input type="button" value="x"/> ▾ (User)
Operating profit (EBIT)	<input type="text"/>	EUR <input type="button" value="x"/> ▾
Net income	<input type="text"/>	EUR <input type="button" value="x"/> ▾
Liabilities (non current)	12,00	EUR <input type="button" value="x"/> ▾ (User)
Liabilities (current)	<input type="text"/>	EUR <input type="button" value="x"/> ▾
Cash	<input type="text"/>	EUR <input type="button" value="x"/> ▾
Number of employees	<input type="text"/>	ea. <input type="button" value="x"/> ▾
Preface rating	<input type="text"/>	ea. <input type="button" value="x"/> ▾
Cash Flow(CAF)	<input type="text"/>	EUR <input type="button" value="x"/> ▾
Gearing	<input type="text"/>	% <input type="button" value="x"/> ▾
Rating	<input type="text"/>	

12 Record(s)

### Charts

2023

Revenue Net income

2 **Year**

2023

### KPI

Liabilities / Capital	0.80
Operating profit / Revenue	
Cash Flow Margin (CF/CA)	
Dept capacity (Financial debt / CAF)	
Financial debt (liabilities(non-current) + liabilities(current))	



# 04. Maintaining supplier information

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## 04.2 Sub-tier suppliers



# Sub-tier suppliers: Adding a new sub-tier

## Maintaining Supplier information: Sub-tier suppliers: Add new sub-tier

The tool allows you to maintain an accurate list of the sub-tier suppliers that you are using when conducting business with Borregaard.

Borregaard kindly requests that you keep the list updated and accurate.

- 1 Go to the **Manage Sub-Tiers** in the **General Info** menu
- 2 Click on **Add Sub-Tier** to add a new sub-tier supplier
- 3 Enter the relevant supplier legal name and address. Legal name and Country are mandatory fields
- 4 Enter the relevant **Identifying Numbers**, like VAT number and DUNS
- 5 If relevant, enter the relationship, like what category and country you work with the sub-tier supplier in
- 6 Click the **Save** button

The screenshot displays the Borregaard user interface. At the top, there are navigation tabs: 'General Info.', 'Requests & Auctions', and 'Performance & Collaboration'. Below these, a 'Company Profile' menu is open, with 'Manage Sub-Tiers' highlighted and circled with a red box and the number 1. The 'Manage Sub-Tiers' page shows a table of sub-tier suppliers with columns for 'Sub-Tier Supplier', 'Sub-supplier No 1', and 'Underleverandør nummer 1'. The 'Add Sub-Tier' button is circled with a red box and the number 2. The 'Manage Sub-Tier' form is open, showing fields for 'Supplier' (New sub-tier), 'Legal Company Name' (New Sub-Tier name), 'Address' (Address Label, Address Line 1, Address Line 2), 'Zip Code', 'City', 'State/Province', 'Country', 'Identifying Numbers' (STCD1, VAT Number, DUNS, Website), 'MWBE Categories', and 'Sub-Tier Relationship' (Country, Category, Relationship Status). The 'Save' button is circled with a red box and the number 6. A map is visible at the bottom of the form, showing the location of Sørkedalsveien 6, 1369 Oslo.





# Sub-tier suppliers: Removing a sub-tier

## Maintaining Supplier information: Sub-tier suppliers: Remove sub-tier

- 1 Go to the **Manage Sub-Tiers** in the **General Info** menu
- 2 Click on pencil icon of the sub-tier you want to remove
- 3 Click on the button **Remove** sub-tier  
Borregaard will review the change, and approve it.

The screenshot illustrates the process of removing a sub-tier in the Borregaard system. It is divided into three main sections:

- General Info:** Shows the 'Company Profile' menu with 'Manage Sub-Tiers' highlighted (indicated by a red box and a blue circle with the number 1).
- Manage Sub-Tiers:** Shows a list of sub-tier suppliers. The 'Sub-supplier No 1' entry has a pencil icon next to it, which is highlighted with a red box and a blue circle with the number 2.
- Manage Sub-Tier: Sub-tier supplier name:** Shows a form for editing the sub-tier. The 'Remove' button is highlighted with a red box and a blue circle with the number 3.

The form contains the following fields:

- Supplier:** Sub-supplier No 1
- Legal Company Name:** Sub-tier supplier name
- Address:** Address Label, Address Line 1 (Sørkedalsveien 6), Address Line 2, Zip Code (0369), City (Oslo), State/Province (Oslo), Country (NORWAY)
- Identifying Numbers:** STCD1, VAT Number (NO123333333mva), DUNS (33-444-7777), Website
- Sub-Tier Relationship:** Country, Category, Relationship Status (Active), Added On (29.08.2024)



05.  
Answering questionnaires

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# Answering questionnaires (1/2)

## Answering questionnaires

Borregaard may send questionnaires to you, in order to update information on your certifications, or on your capabilities.

1 You will find any questionnaires which are outstanding on your home page, in the **Validations** post

2 You open the questionnaire by clicking on the **Object** title

The screenshot shows the Borregaard Supplier Portal interface. At the top, there are navigation links: General Info, Requests & Auctions, and Performance & Collaboration. The main header is "Supplier Portal".

On the left sidebar, there are three buttons: "Company Profile", "Suggest Collaboration Plan", and "Review Client".

The main content area is divided into several sections:

- Announcement:** A text block providing information about the supplier portal and contact details (contact@ivalua.com, Phone: +1 545 454 XXXX).
- Onboarding Progress:** A section with four items, each with a green checkmark: "Registration Onboard Pending", "Preparation Gather Information", "Enrollment Rev. Review Information", and "Active Supplier Onboard Complete".
- Performance Scoring:** A radar chart titled "Extranet - Scoring" with six axes representing different performance criteria. The legend indicates "Last Score Supplier (sub-criteria)".
- Validations:** A table with columns "Process", "Object", "Action", and "Due date". It lists two items: "Full Risk Assessment" and "Qualification". The "Qualification" row is highlighted with a red box, and a blue circle with the number "2" is placed over the "Object" column header. A blue circle with the number "1" is placed over the "Validations" section header.

On the right sidebar, there are three circular icons with numbers: "1 Proposals in progress", "2 Exceptions", and "2 Collaboration Plans".

In the center of the main content area, there is a green checkmark icon and the text: "There is no item requiring your attention at the moment."



# Answering questionnaires (2/2)

## Answering questionnaires

- 3 You can access the questions by clicking on the tabs in the left side of the pop-up window, or by clicking on the **Access Questionnaire** button
- 4 You can also choose to download the questionnaire as an excel file, respond in the file, and then upload the file again.
- 4 If you choose to do this, you have to comply with the format limitations in the excel file – otherwise you will not be able to upload the file again
- 5 Once you have answered the questionnaire, click on the **Submit** button
- 5 You will get error messages if you attempt to click on **Submit** if there are mandatory questions that you have not responded to

The screenshot displays a web interface for a supplier portal. A central pop-up window titled "Answer Questionnaire : Packaging Questionnaire" is open. This window contains several elements: a "Close" button and a "Submit" button (labeled 5); a "3a" callout pointing to the "Overview" tab; a "3b" callout pointing to the "Access Questionnaire" button; and a "4" callout pointing to the "Download in Excel 2007-2010 format (xls)" and "Download in Excel 97-2003 format (xls)" options. The "Overview" section shows "Supplier: Test Supplier" and "Answered by: Aas Aadne". Below this, there are two options: "Access Questionnaire" and "Download in Excel 2007-2010 format (xls)" / "Download in Excel 97-2003 format (xls)". The background shows a dashboard with "Announcement", "Onboarding Progress", and "Performance Score" sections.

## 06. Handling exceptions

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# Handling exceptions

## Handling exceptions

If Borregaard registers a deviation, for example from agreed delivery, or if there is a breach of Borregaards life saving rules, an exception will be registered in the system, and you as a supplier are expected to react to it.

You will receive an email, and the **Indicator** on your homepage will state the number of open exceptions

Click on the **Exceptions Indicator**, or select

- 1 **Exceptions** from the **Performance & Collaboration** menu

- 2 The list of exceptions displays a short description; the severity of the exception; the responsible person at Borregaard who registered the exception, and the date the exception was created

- 3 You can open the exception by clicking on the description text

The screenshot shows the Borregaard Supplier Portal interface. At the top, there is a navigation menu with 'Performance & Collaboration' selected, and a sub-menu where 'Exceptions' is highlighted. A red box and the number '1' indicate this step. Below the navigation, there is an 'Announcement' section with text about logging into the portal and contact information. To the right, there are progress indicators for 'Proposals in progress' (1), 'Exceptions' (1, highlighted with a red box and '1'), and 'Collaboration Plans' (0). A central message states 'There is no item requiring your attention at the moment.' Below this, there is a search and filter section for exceptions, with a red box and the number '2' indicating this area. At the bottom, a table lists exceptions, with a red box and the number '3' highlighting the first row's description: 'No permission before entering confined space'.

Exception ID	Description	Severity	Responsible at Borregaard	Creation date	Duration	Status	End Date
36	No permission before entering confined space	High	Gynnild Gøran Flakne	30.08.2024	0 days	In process	



# Handling exceptions: Breach of Borregaards life savings rules

## Handling exceptions: Breach of Borregaards life saving rules

In case of a breach of Borregaards life saving rules, the exception will state

- 1 Whether the breach was by your company, or one of your sub-tiers, and which of the rules have been broken

The **Exception Description** states information regarding the dates and the person responsible at Borregaard for registering the exception

2

Your company is expected to provide a corrective action, within one week of the exception being raised

3

Click on the **Suggest Corrective Action Plan**

4

button to provide the official response to the exception

5

You can communicate with the responsible person by sending a **Comment**. You may also attach documents to the comments. Click the **Save** Button to send the comment

**Borregaard** General Info. Requests & Auctions Performance & Collaboration

Exception details : No permission before entering confined space

Save Save & Close

**Breach of Borregaard's lifesaving rules**

Borregaard has a high focus on safety. In order to limit the scope of risks, injuries and other types of incidents, all Breaches of Borregaard's life-saving rules are registered in our non-conformance system. The overall goal of non-conformance systems is to uncover, work preventively and possibly prevent recurring incidents and injuries. It is also an important tool for Borregaard when evaluating suppliers and business partners.

**Breach of life-saving rules from**

The supplier or the suppliers personnel

**The following of "Borregaard's life-saving rules" have been broken:**

- Always ensure you have the necessary permission before entering confined spaces
- Release and secure energy when working on equipment (e.g. relieve pressure and disengage electricity)
- Never breach a physical safety barrier without approval
- Always be secured when working at height
- Always use the necessary protective equipment when handling chemicals
- Never pass beneath suspended load
- Comply with requirements for hot work
- Do not breach the safety zones between vehicles and pedestrians without the go-ahead

In accordance with "Safety rules for contractors at Borregaard AS", you have hereby receive a written warning about the incident. In the case of repeated breaches of Borregaards life-saving rules, the person(s) in question will be banned from Borregaard, and our supplier relationship will be assessed.

More information on the breach can be found in the **Exception Description** section. You can communicate with Borregaard and the owner of the exception through the **Comments** section.

You must take action towards your own personnel, as well as any relevant subcontractors, to avoid future breaches of "Borregaard's life-saving rules" in particular and "Safety rules for contractors at Borregaard AS" in general.

Please provide a Corrective action - what was the reason for the breach, and what actions will be taken to avoid further breaches to the life-saving rules, using the **Suggest Corrective Action Plan** button.

**Deadline for response: 1 week**

**Exception Description**

**Description**  
No permission before entering confined space en

**Exception Type**  
Breach of life saving rules

**Severity**  
High

**Creation Date**  
30.08.2024

**Date of Exception**  
29.08.2024

**Detailed Description**  
One of your employees entered the restricted zone in the building without having obtained permission en

**Responsible for the exception at Borregaard**  
Gynnild Goran Flakne

**Exception Outcome**

**Status**  
In process

**End Date**  
[Empty field]

**Resolution**  
[Empty field]

**Associated Corrective Action Plans**

**Suggest Corrective Action Plan**

**Comments**

Comment  
[Empty text area]

Click or Drag to add files Save



# Handling exceptions: Other types of exceptions

## Handling exceptions: Other exceptions

For other types of exceptions, the information under the exception gives an introduction to the exception handling, and

- 1 informs you whether the exception was committed by your company, or one of you sub-tiers, as well as the name of the sub-tier supplier (if relevant)

The **Exception Description** states information

- 2 regarding what type of exception, its severity, and details on the exception

Your company is expected to provide a

- 3 corrective action, within one week of the exception being raised

Click on the **Suggest Corrective Action Plan**

- 4 button to provide the official response to the exception

You can communicate with the responsible person by sending a **Comment**. You may also attach documents to the comments. Click the **Save** Button to send the comment

- 5

The screenshot shows a web interface for managing exceptions. It is divided into several sections:

- 1 Registered Exception/Non-Conformance:** Contains introductory text, a notification that an exception has been registered, and two input fields: "The exception was committed by" (with the value "The suppliers sub-tier supplier or the sub-tiers personnel") and "Name of the Sub-Tier Supplier" (with the value "Sub-supplier").
- 2 Exception Description:** Contains fields for "Description" (Late delivery), "Exception Type" (Exception Delivery - Observation), "Severity" (Low), "Exception Classification" (Delay), "Creation Date" (30.08.2024), and "Date of Exception". It also has a "Detailed Description" field with the text: "The planned delivery happened later than agreed. Could you please stress the importance of timely delivery to you sub-supplier?".
- Exception Outcome:** Contains fields for "Status" (In process), "End Date", and "Resolution".
- Associated Corrective Action Plans:** Contains a button labeled "Suggest Corrective Action Plan".
- 3:** A red box highlights the text: "In addition, please provide a Corrective action - what has been done/will be done to remove the cause of the exception/non-conformance in order to avoid similar in the future, by pressing the button **Suggest Corrective Action Plan**". Below this is a "Deadline for response: 1 week".
- 4:** A red box highlights the "Suggest Corrective Action Plan" button.
- 5 Comment:** A red box highlights a "Comment" input field and a "Save" button.



## 07. Collaboration plans

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# Collaboration plans: Create from exception (1/2)

## Collaboration plans: Created from exception

The collaboration plans are used for proposing new ways of collaboration, or for proposing corrective actions in the case of exceptions

- 1 The **Origin** shows the link to the related exception
- 2 Enter a title of the collaboration plan, as well as a **Detailed Description**, and the **Main Goals** of the plan
- 3 Once you are ready, click on the **Save** button

The screenshot shows a web form for creating a collaboration plan. It is divided into several sections:

- Plan Description:** Contains fields for Plan Type (set to 'Corrective Action Plan'), Domain, Sub-Domain, Status (set to 'Draft'), Start Date (30.08.2024), and End Date. A red box labeled '2' highlights the 'Label\*' field.
- Scope:** Contains fields for Organizations and Categories.
- Origin:** A red box labeled '1' highlights this section, which shows an 'Exception' dropdown menu with the text 'No permission before entering confined space' and a link icon.
- Buttons:** At the top right, there are 'Save' and 'Save & Close' buttons. A red box labeled '3' highlights the 'Save' button.
- Other fields:** Below the Plan Description section, there are 'Detailed Description' and 'Main Goals' text areas, both highlighted with a red box.



# Collaboration plans: Create from exception (2/2)

## Collaboration plans: Created from exception

4 Once you have saved the collaboration plan, click on the **Share Plan** to share the plan with Borregaard

5 You can communicate with Borregaard on the plan, using the **Add a Comment**, to write comments, potentially with attached files as well

Borregaard can approve the plan, and, once the plan has been executed, close the plan, and the related exception

General Info. Team & Tasks

Save Save & Close Share Plan

### Plan Description

Plan Type: Corrective Action Plan

Domain: Sub-Domain

Label\*: This is a proposed corrective action plan en

Status: Draft Start Date: 30.08.2024 End Date:

Detailed Description: Here are the detailed descriptions of the plan

Main Goals: These are the main objectives:  
1) A  
2) B

### Scope

Organizations:

Categories:

### Origin

Exception: No permission before entering confined space

### Add a Comment

Comments

Comment:

Click or Drag to add files Send to: Save



# Collaboration plans: Create from scratch

## Collaboration plans: Created scratch

You can create a collaboration plan from scratch, if you for instance want to propose innovation plans with Borregard

1 Select **Collaboration Plans** from the **Performance & Collaboration** menu

2 Click on the **Suggest Collaboration Plan** button

3 In the **Plan Description**, select **Innovation Plan**

Complete the collaboration plan as on the previous pages

The screenshot displays the Borregard web application interface. At the top, the navigation menu includes 'General Info.', 'Requests & Auctions', and 'Performance & Collaboration'. The 'Performance & Collaboration' menu is open, showing options like 'Performance Evaluations', 'Exceptions', and 'Collaboration Plans', with 'Collaboration Plans' highlighted by a red box and a blue circle labeled '1'. Below the menu, the 'Collaboration Plans' page is visible, featuring search filters for 'Keywords', 'Status', 'Start Date', and 'End Date', along with 'Search' and 'Reset' buttons. A 'Suggest Collaboration Plan' button is highlighted with a red box and a blue circle labeled '2'. The 'Plan Description' form is open, showing a dropdown for 'Plan Type\*' with 'Innovation Plan' selected and highlighted by a red box. Other fields include 'Sub-Domain', 'Start Date' (30.08.2024), 'End Date', 'Detailed Description', and 'Main Goals'. The 'Scope' section includes 'Organizations' and 'Categories' dropdowns. 'Save' and 'Save & Close' buttons are located at the top right of the form.



Borregaard