Supplier Training Material

Borregaard Ivalua

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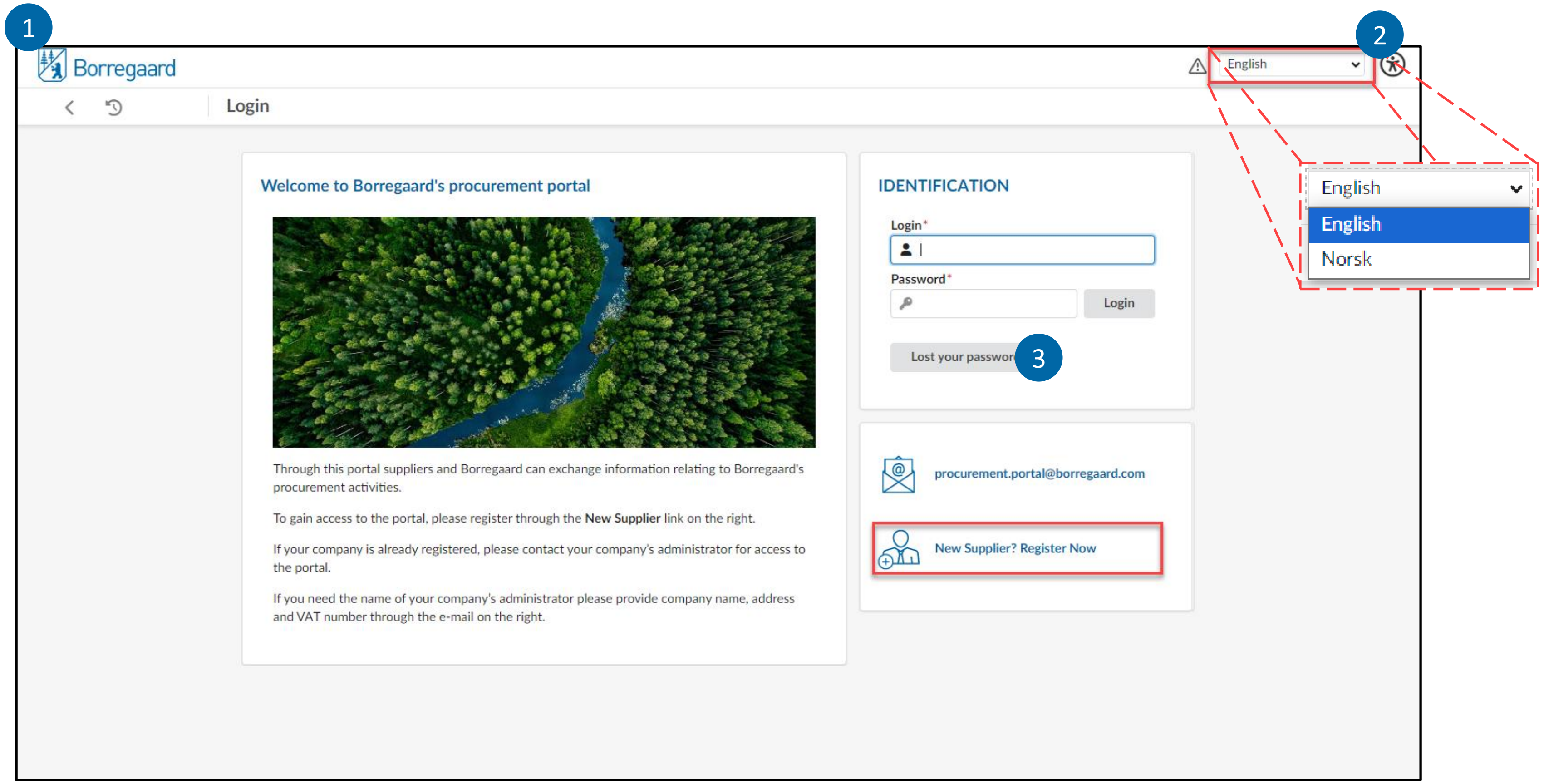
01.
Supplier self registration

Borregaard

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
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

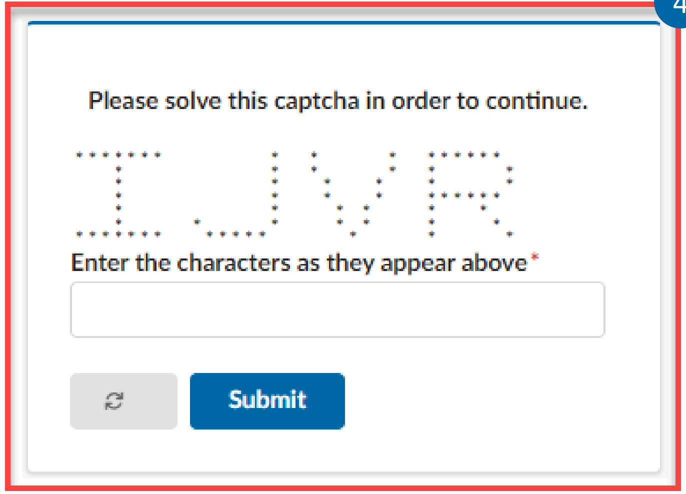


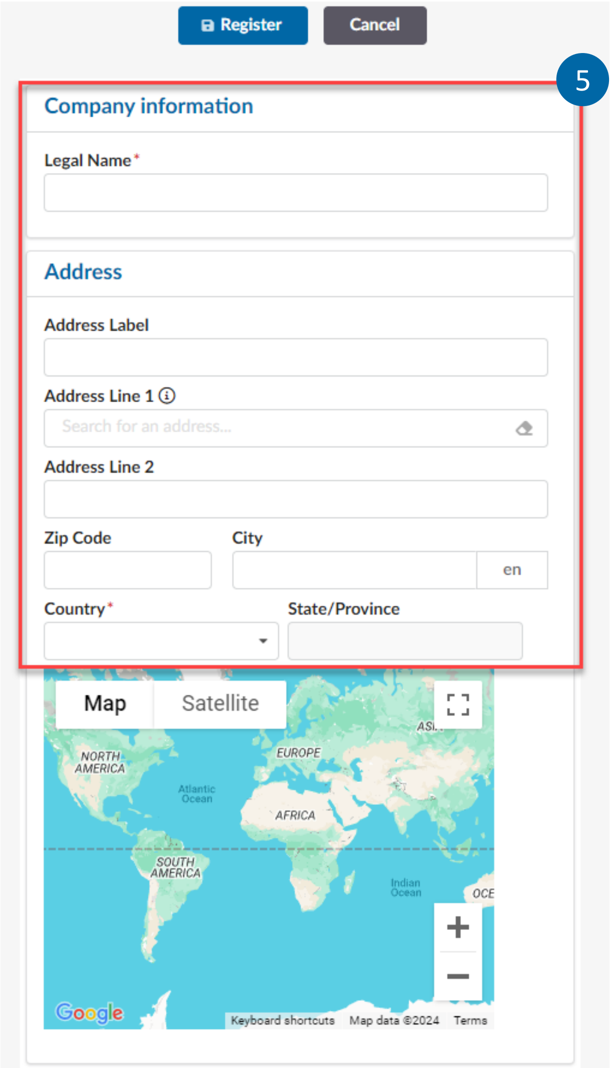
Self registration (2/3)

4 Enter the character as they appear in the captcha and click the **Submit** button
NB: Does not need to be in capital letters.

5 Under the **Company Information** section and **Address**, complete the mandatory fields which are marked with a red asterisk (*)

6 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.





Borregaard

Supplier self registration (3/3)

Self registration (3/3)

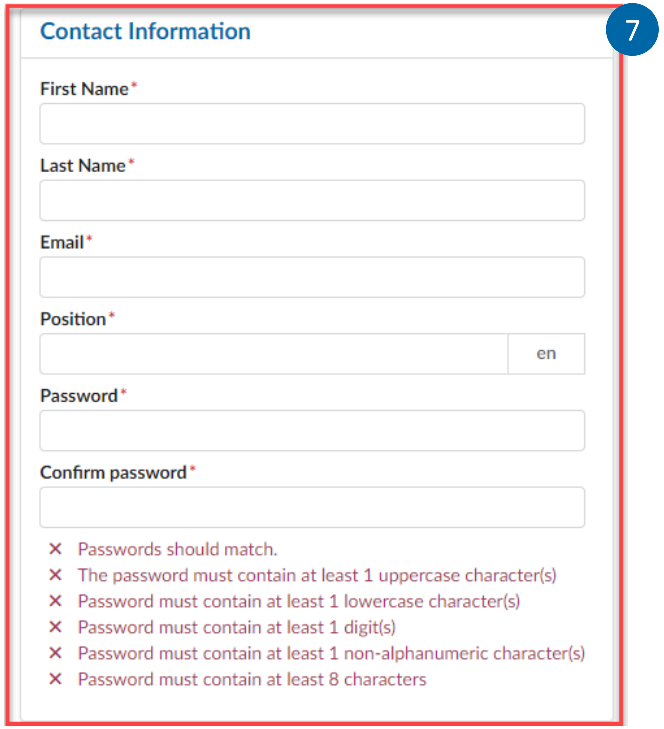
7 Under the **Contact Information** section, fill in the mandatory fields and create a password. NB: The email address and password will be what you use to log in to the solution in the future

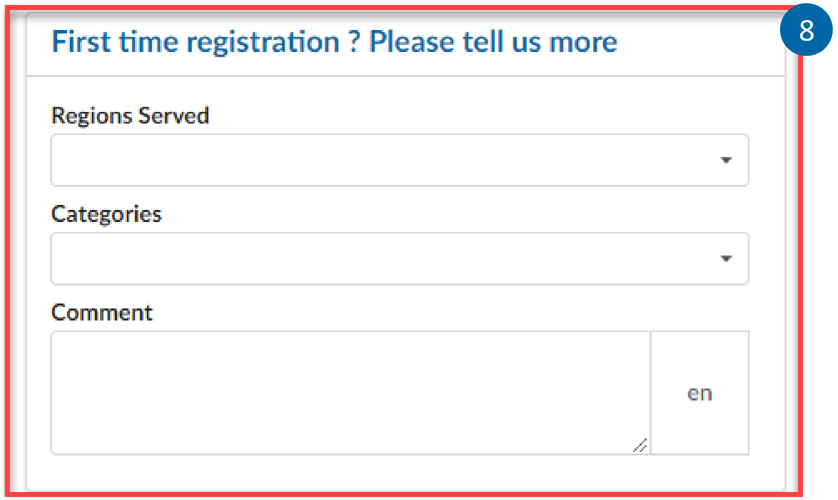
8 Select a category that describes your business in the **First time registration? Tell us more** section

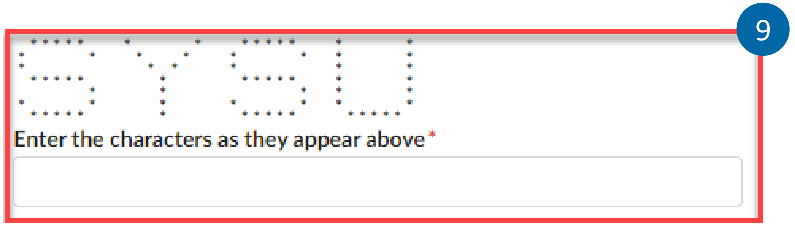
9 Enter the character as they appear in the captcha.

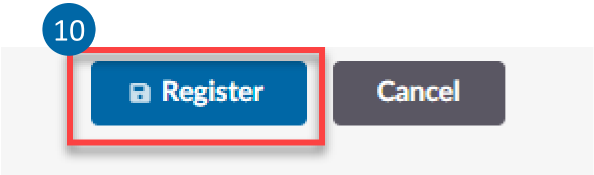
10 Click **Register** at the top of the screen

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









02. Accessing and navigating the Borregaard Ivalua Portal

First time login

First time login

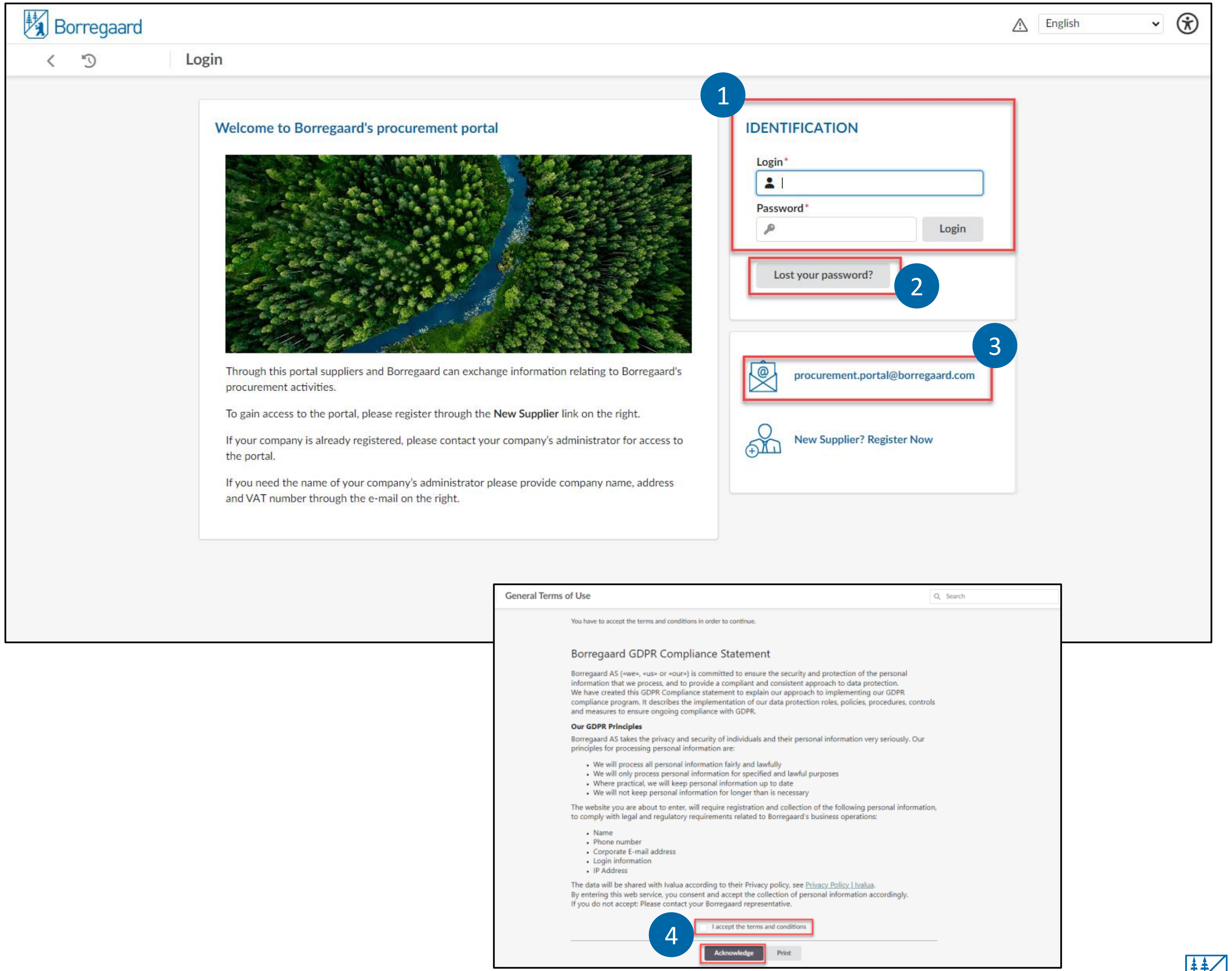
The login page for Borregaards procurement portal

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, 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.



The Home Page

Home page overview

1 **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

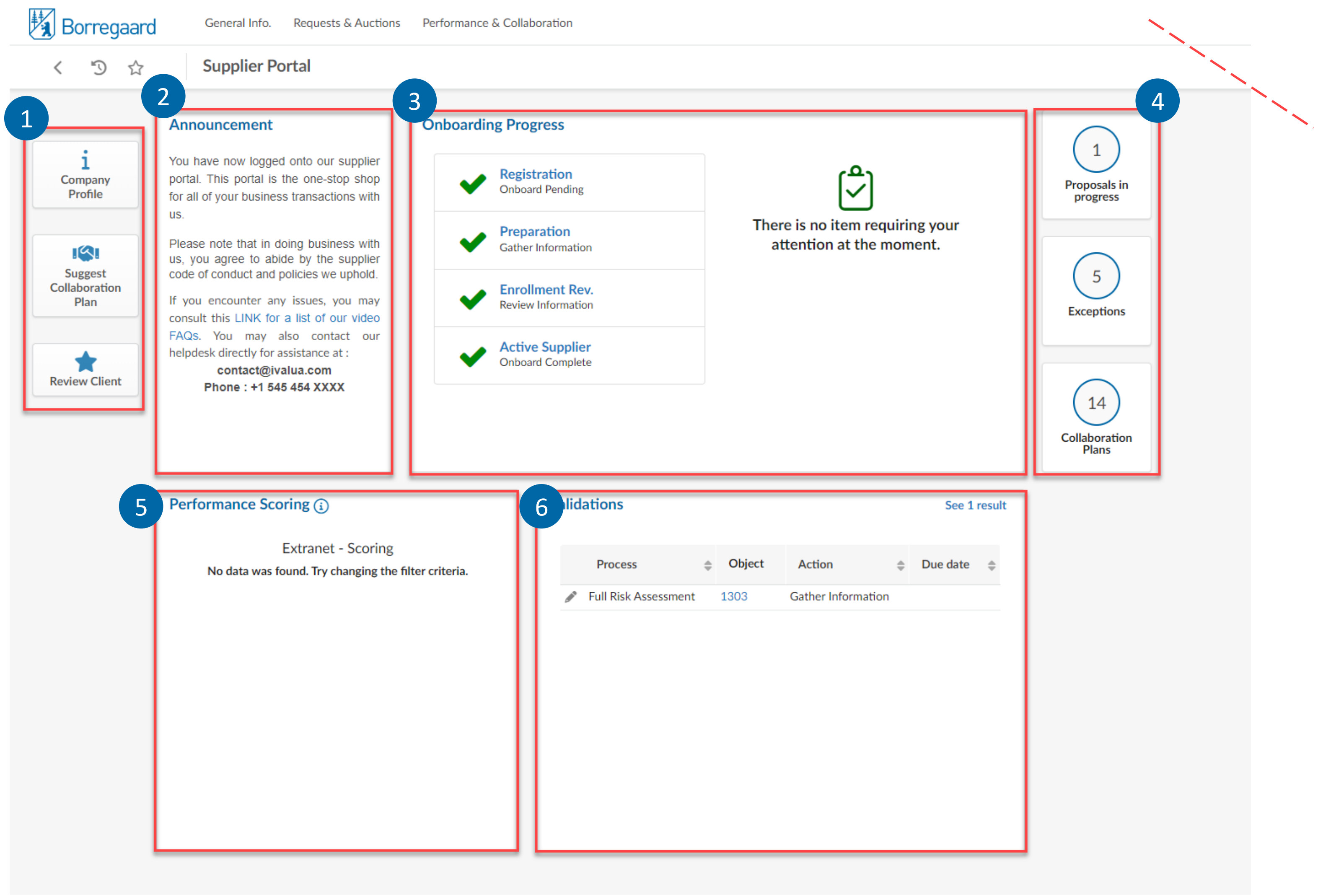
2 **Announcement**
Displays useful information, links or announcements from Borregaard

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

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

5 **Performance**
Displays the performance score you have received from Borregaard

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



The Home Page

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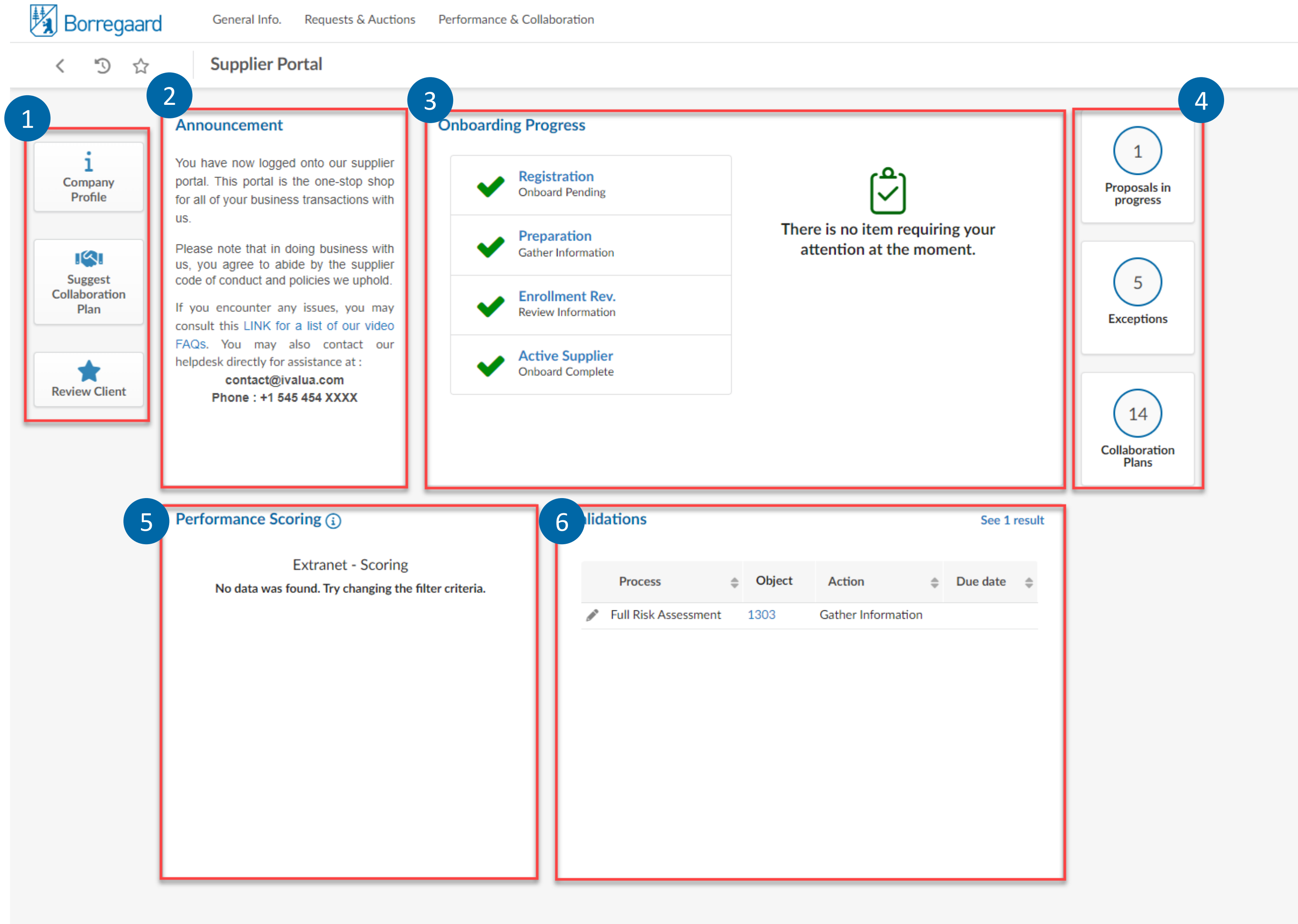
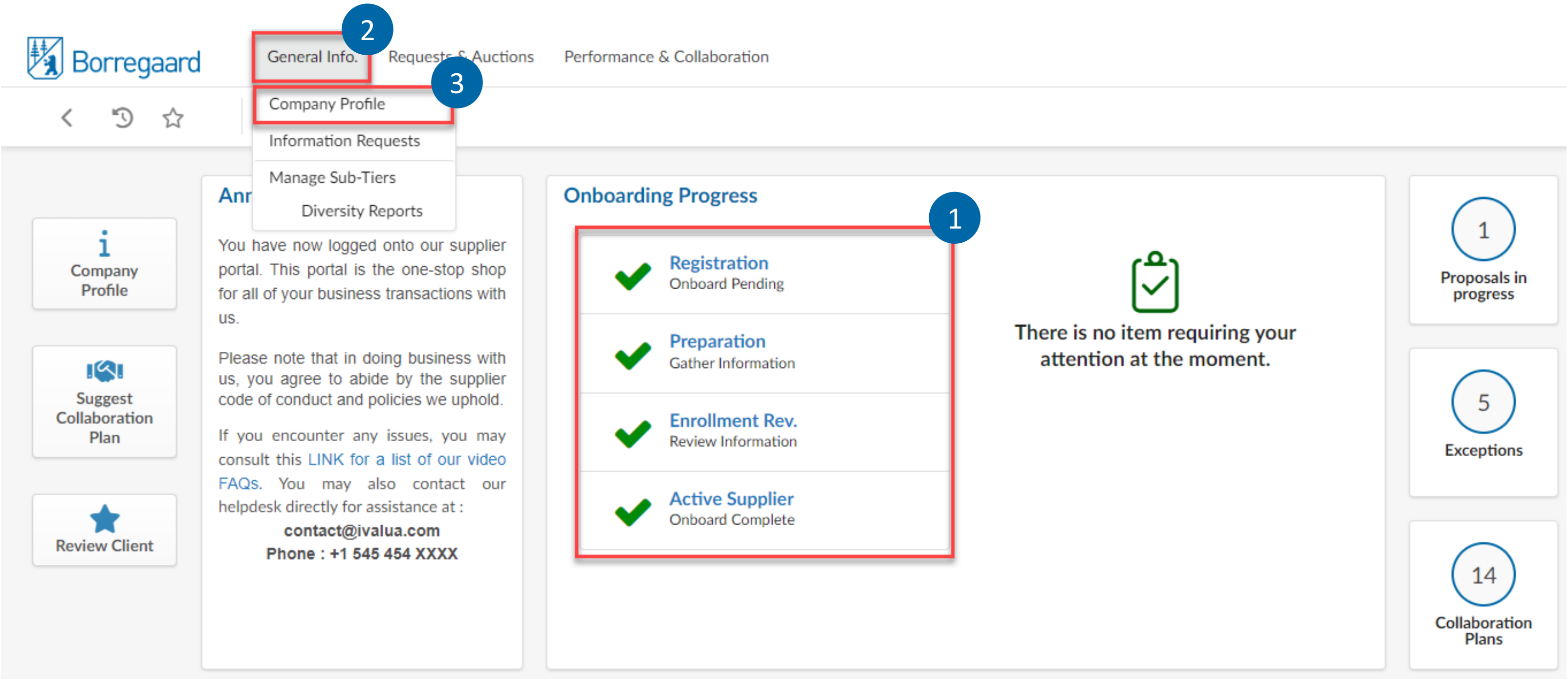


Borregaard

Company Information (1/2)

Company Profile:
Company Information (1/2)

1. 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.
2. Go to **General Info** on top of the page
3. Click on **Company Profile**



Company Information (2/2)

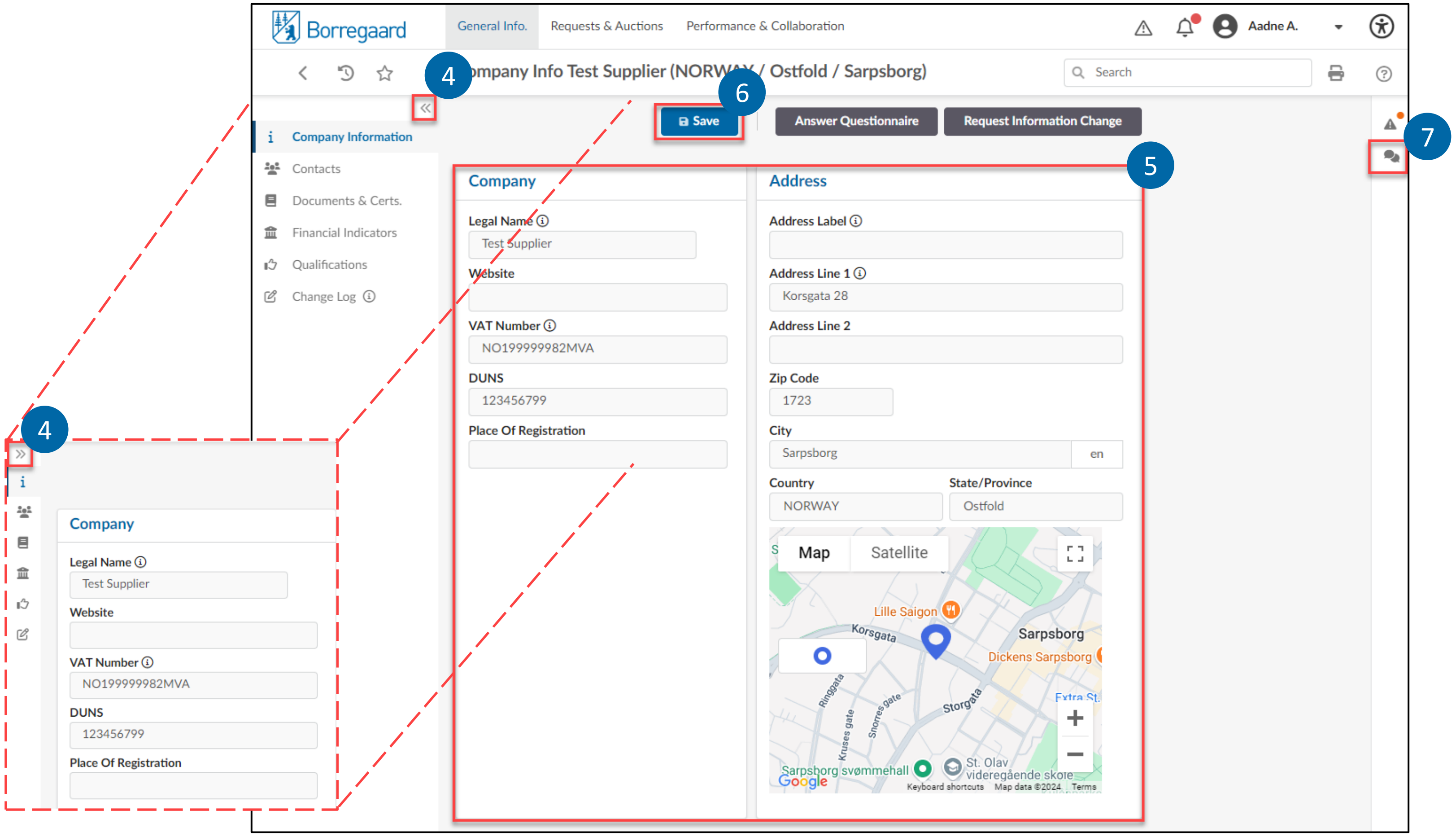
Company Profile:
Company Information (2/2)

4 The navigation tabs on the left side of the screen can be expanded/minimized by pressing the **>>** or **<<** icon, respectively

5 You can edit the information under the **Company and Address** section, if needed

6 Click **Save** after making the necessary changes

7 If you want to communicate with Borregaard, click on the **Speech bubble** icon at the left side of the Company Information screen.



Communicating with Borregaard

Company Profile: Communicating with Borregaard

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

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

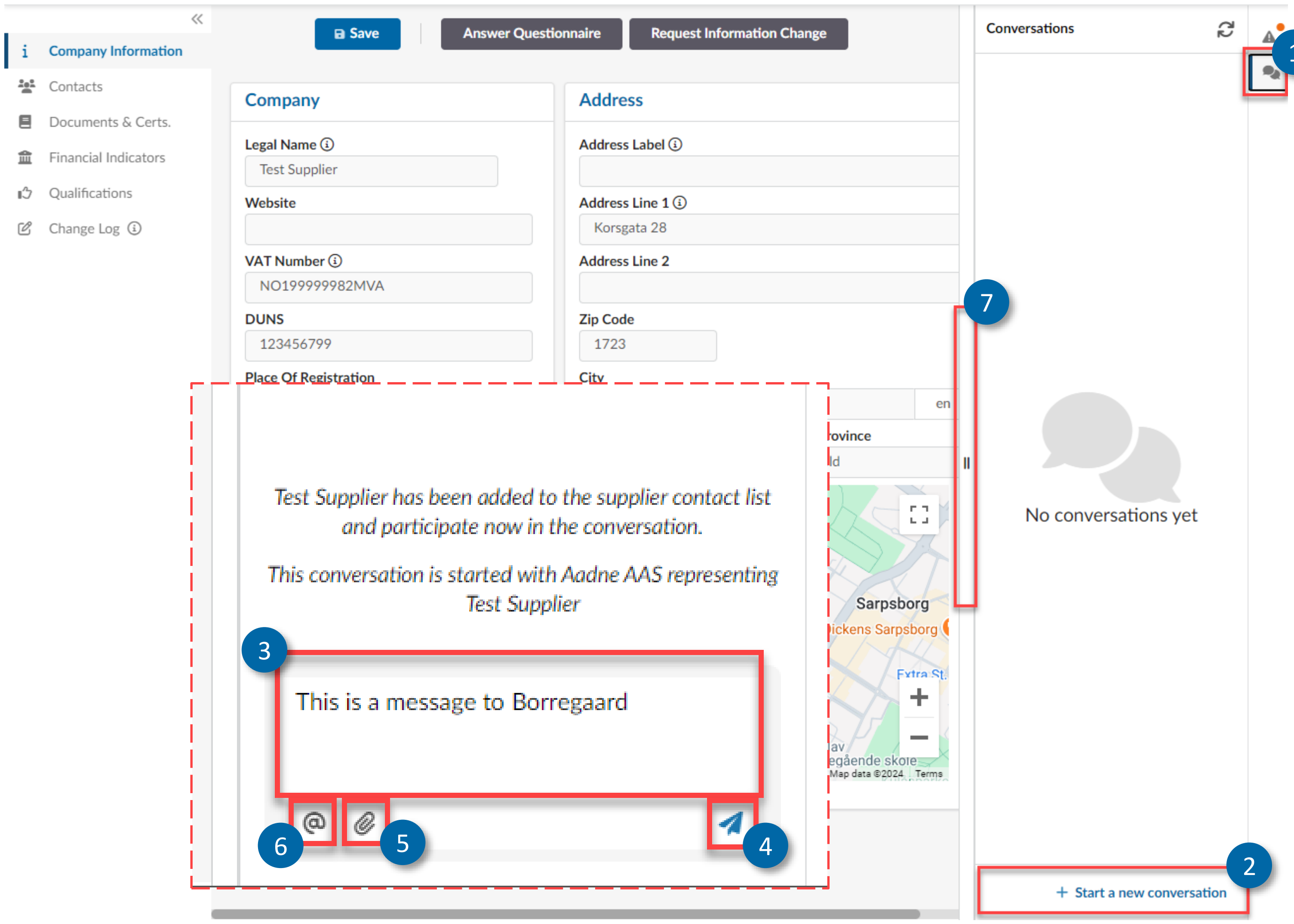
3 Type your message in the message box

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



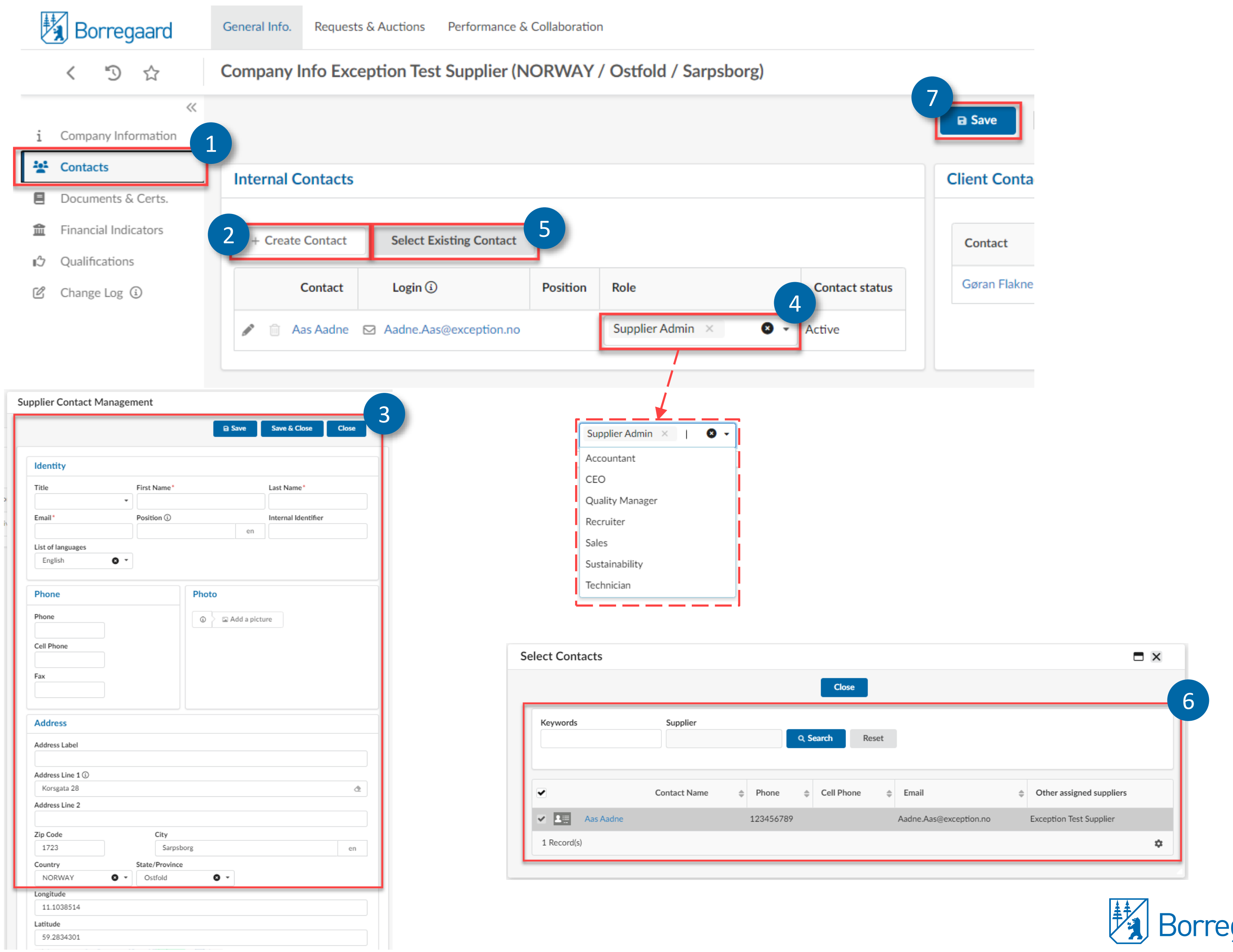
Borregaard

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



Adding documents and certifications

Company Profile: Adding documents and certifications

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

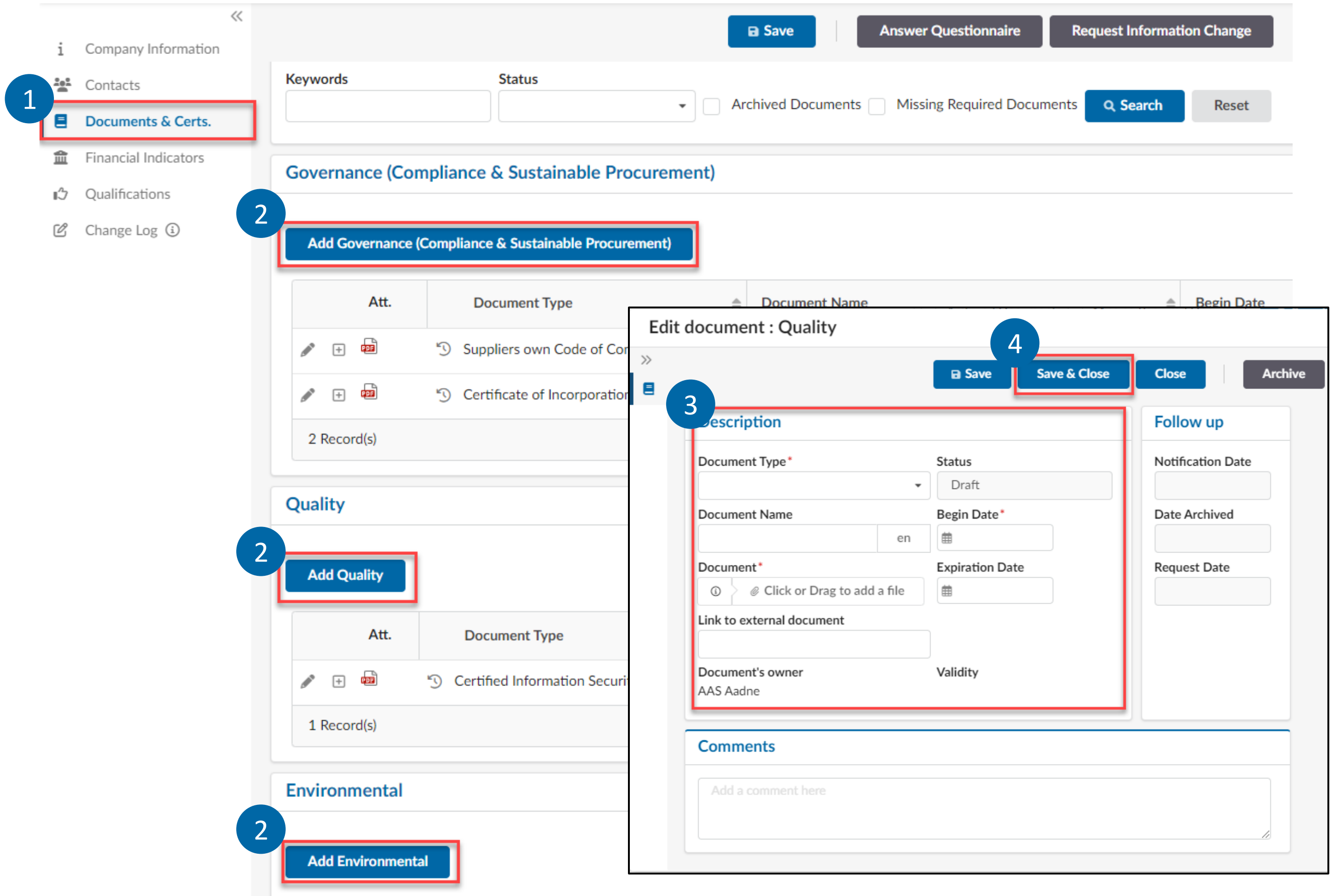
1 Navigate to the **Documents & Certs.** tab on the left

2 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 documentaton

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

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

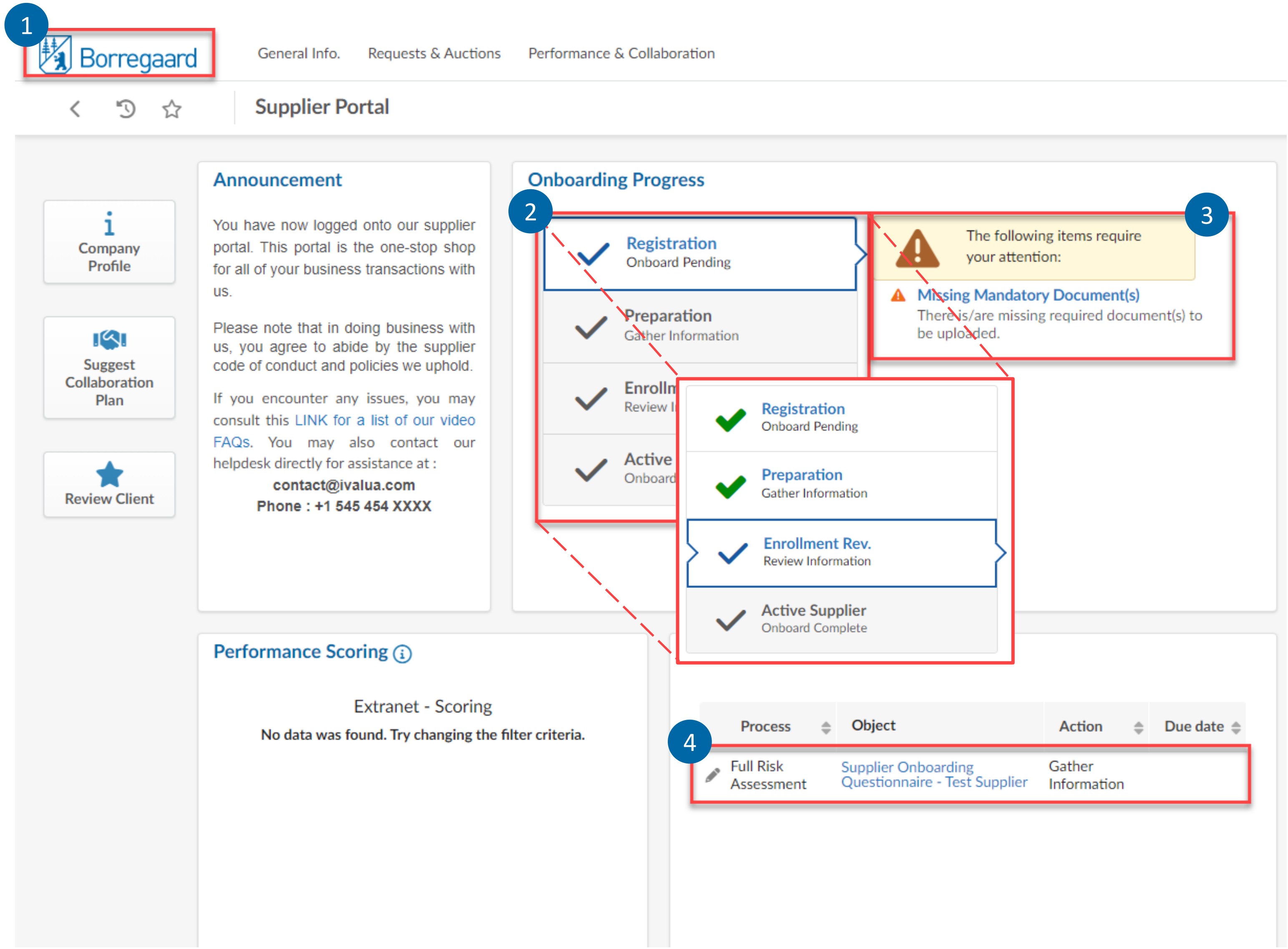
4 Click **Save & Close**



The onboarding process (1/2)

Company Profile:
The onboarding process (1/2)

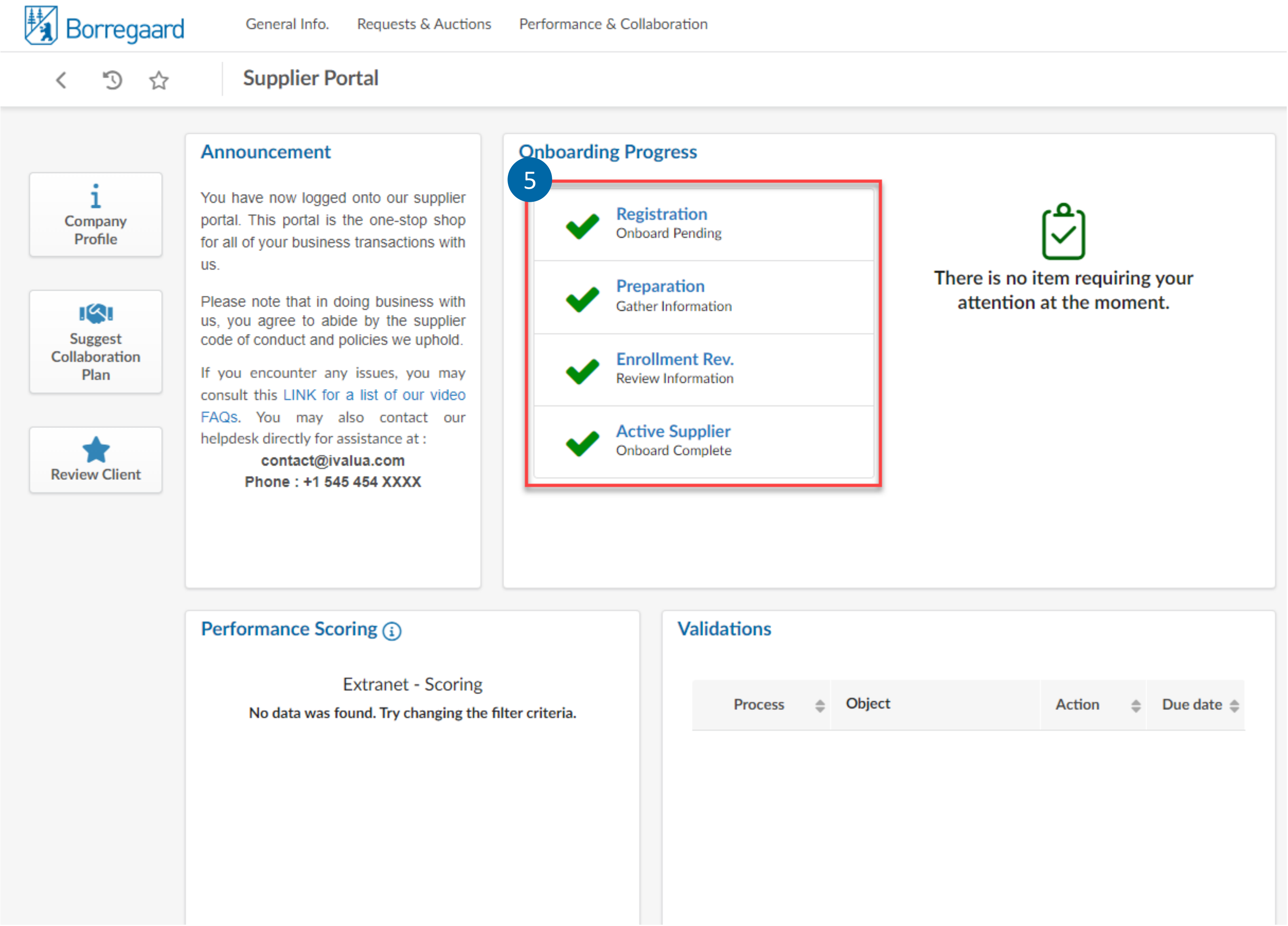
1. Click on the **Borregaard logo** on the left top side to navigate back to the homepage
2. Once a supplier is created and onboarding starts, the Onboarding Progress table will advance to the next step, which is **Enrollment Review**. At this point, the Category manager at Borregaard must approve the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



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



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.

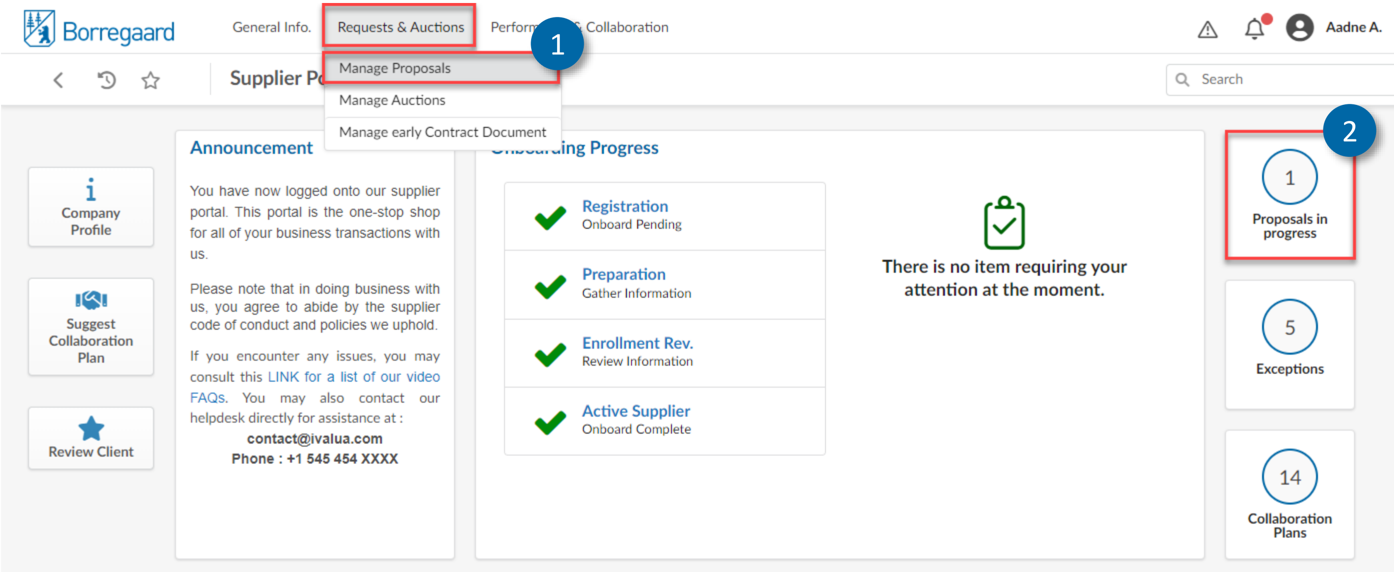
There are two ways of accessing the list of active and new proposals from the homepage:

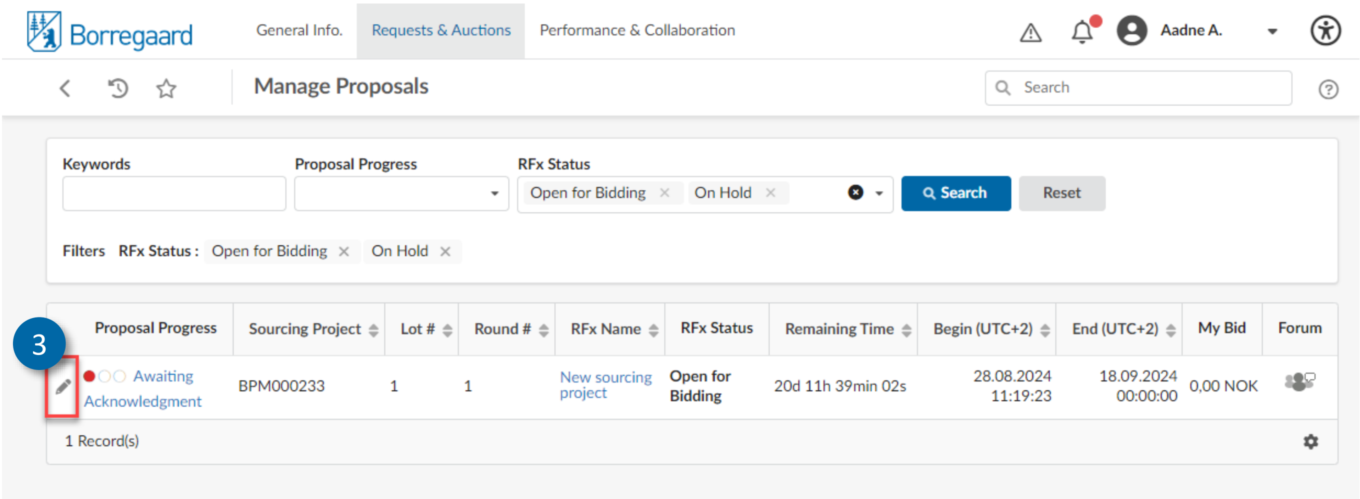
1 Go to **Request & Auctions** in the main menu and click on **Manage Proposals**

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**.





03. Proposals

03.2. Respond to and submit a proposal

Responding to a proposal (1/6)

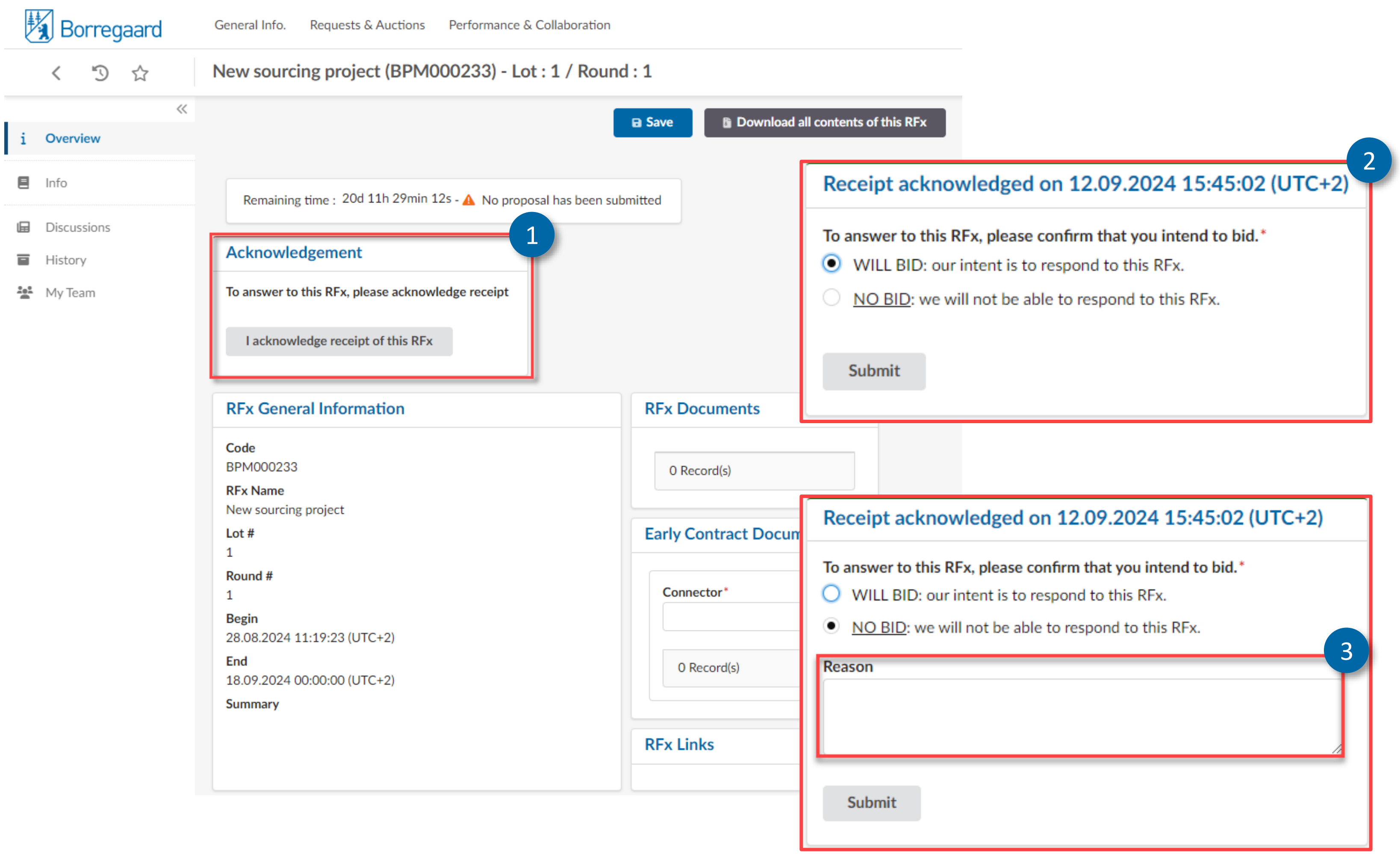
Proposals:
Respond to and submit a proposal

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



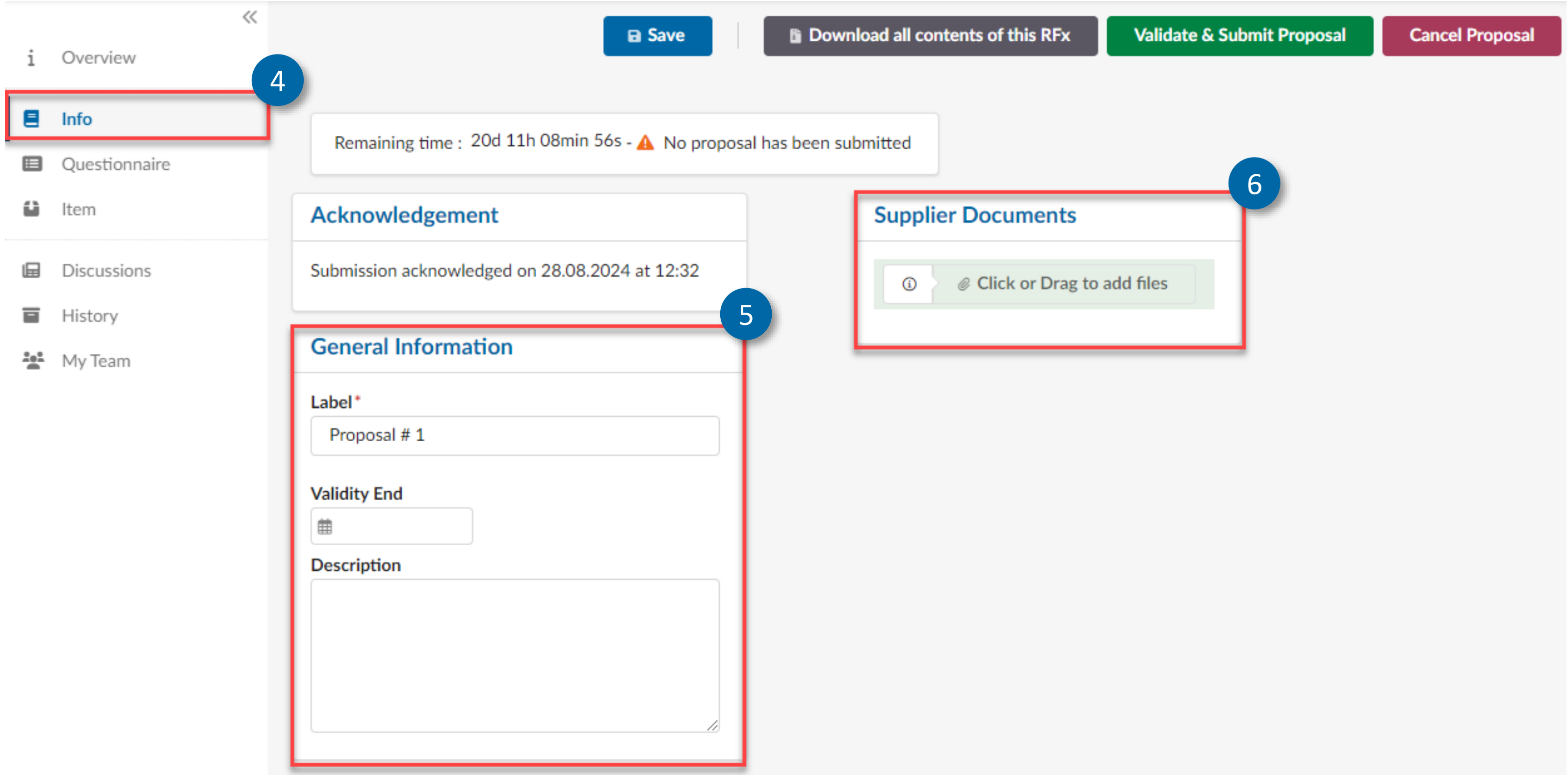
Responding to a proposal (2/6)

Proposals:
Respond to and submit a proposal

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

5 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

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



Responding to a proposal (3/6)

Proposals:
Respond to and submit a proposal

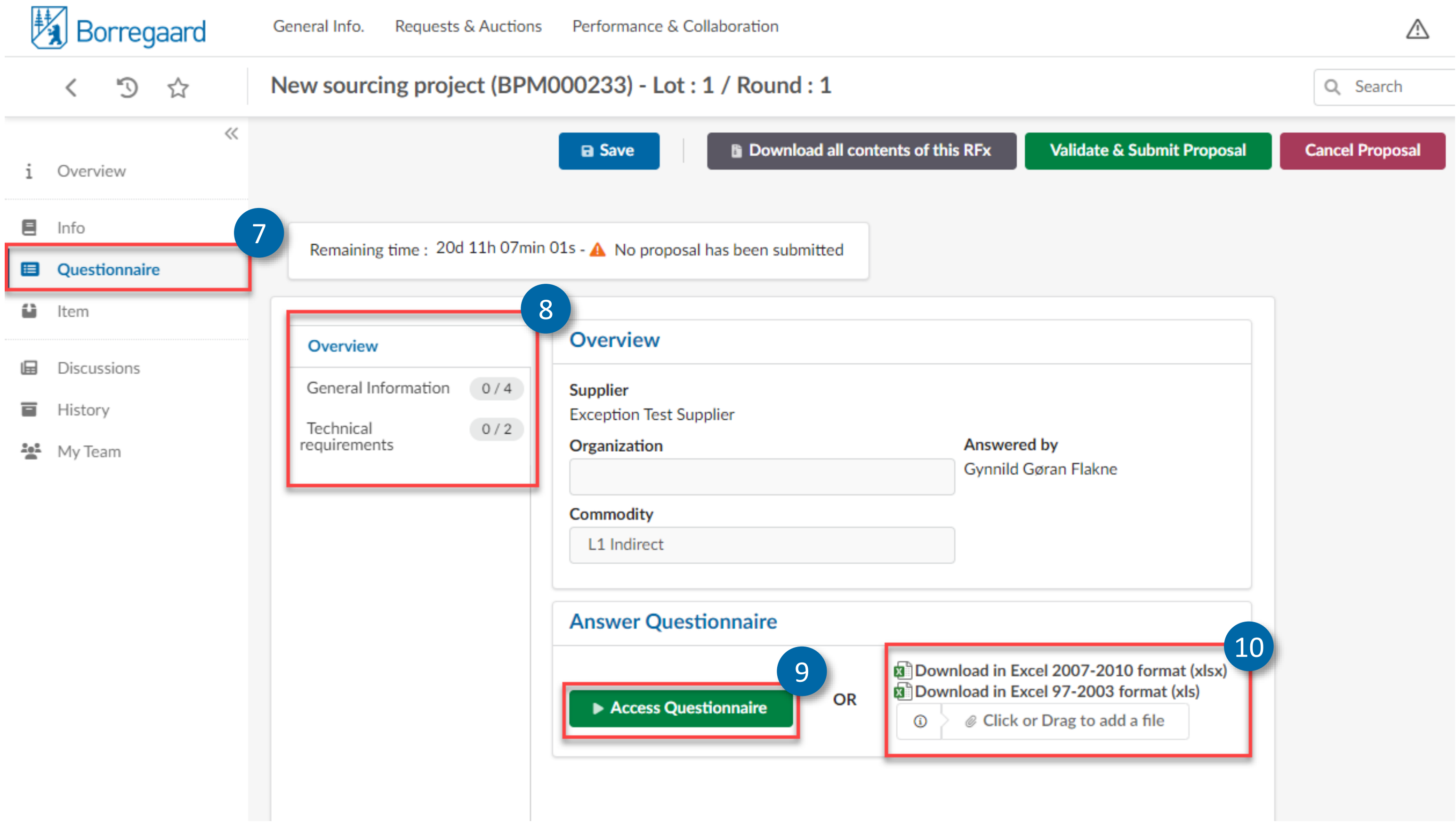
7 Navigate to **Questionnaire** tab on the left

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'



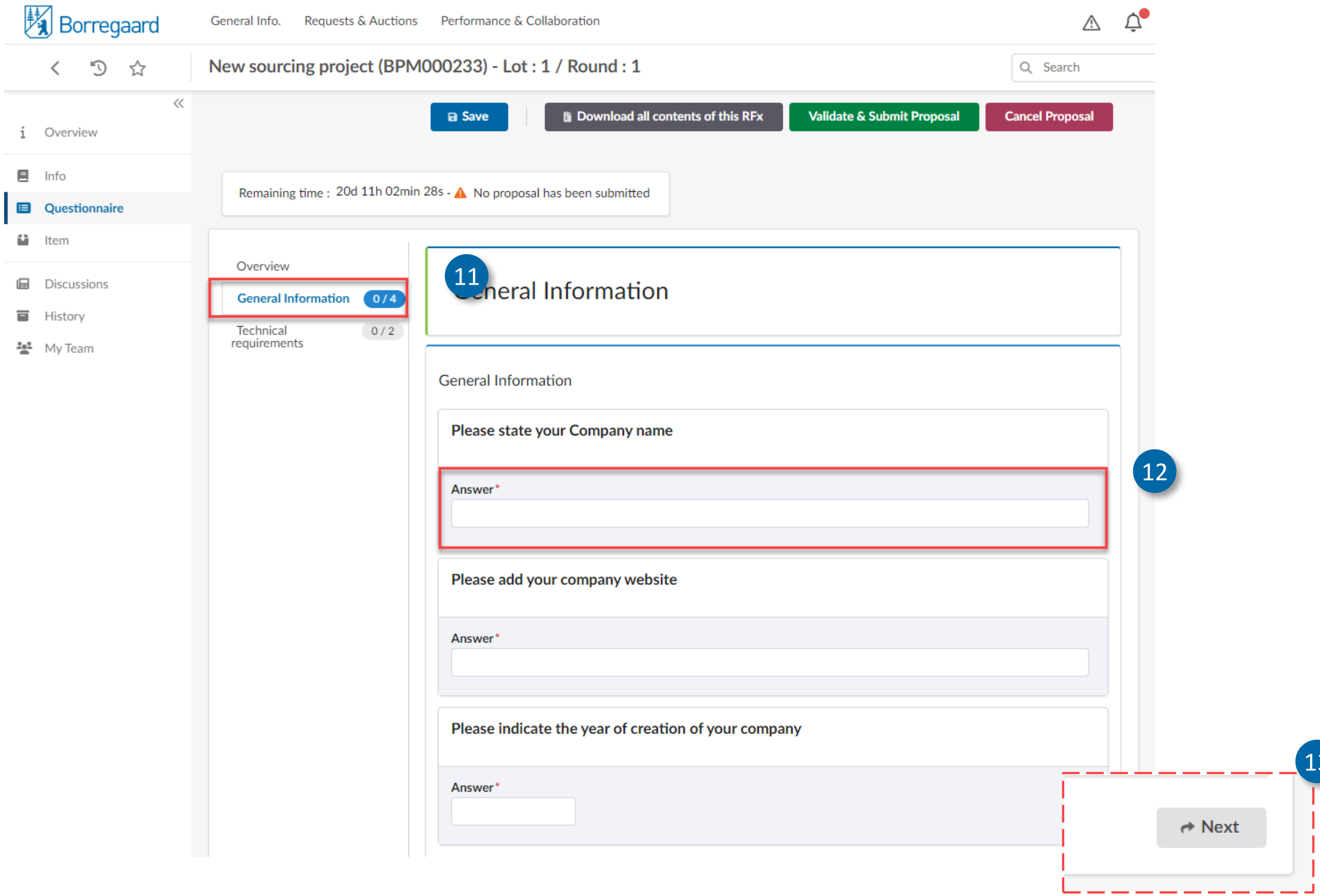
Responding to a proposal (4/6)

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



Borregaard

Responding to a proposal (5/6)

Proposals:
Respond to and submit a proposal

14 Navigate to the **Item** tab on the left

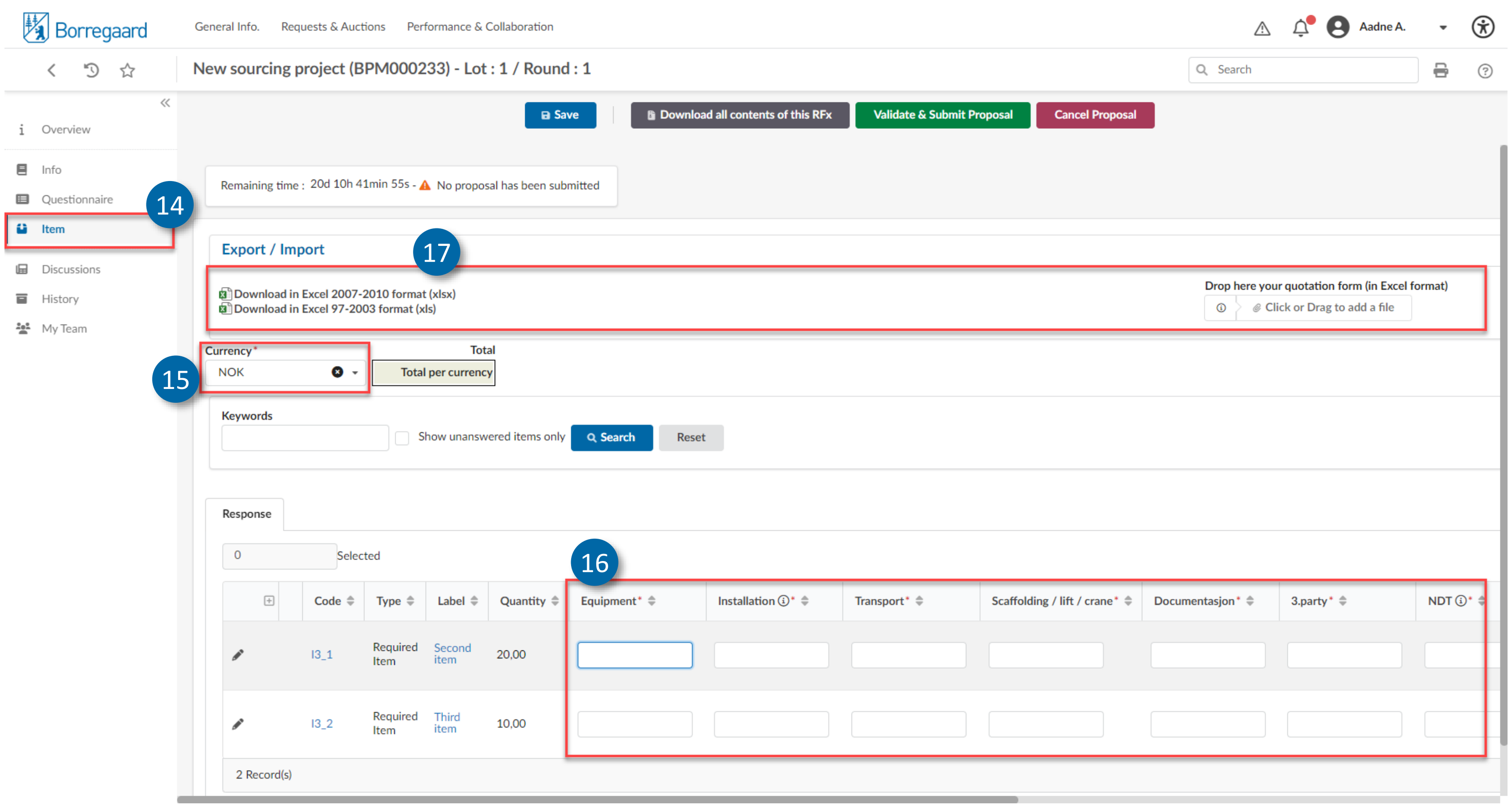
15 The **Currency** field allows you to choose the currency you want to bid in

Under the Response section, enter the price and other input required, like price of Installation, Transport, 3rd party and documentation.

16 All mandatory fields are marked with a red asterisk *

NB: Be aware, the item price grid can vary, depending on the request setup.

17 You may download the item grid in excel format, complete your answer in excel, and upload via the 'Drop your quotation form'



Responding to a proposal (6/6)

Proposals:
Respond to and submit a proposal

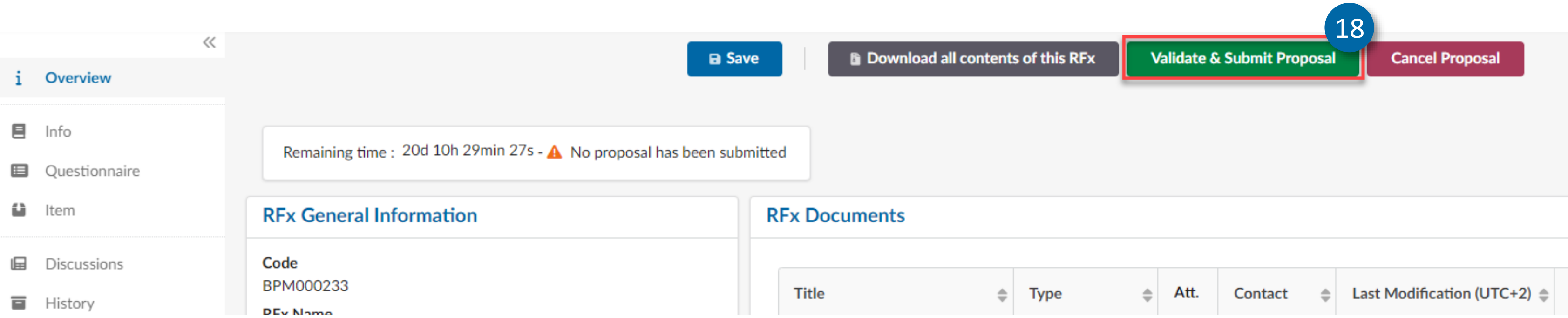
18 Click on **Validate & Submit Proposal** on top of the page to submit the proposal

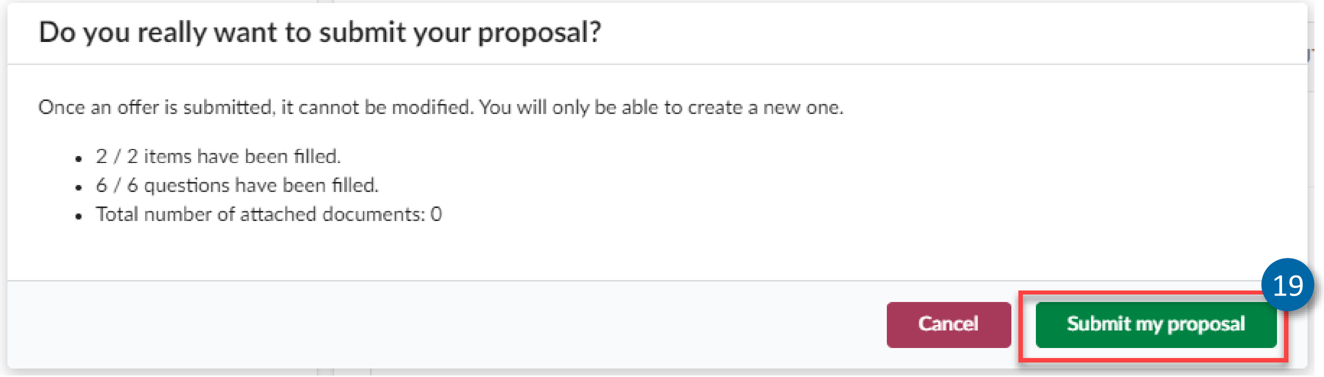
A summary of your response will be displayed in the popup

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





Borregaard

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

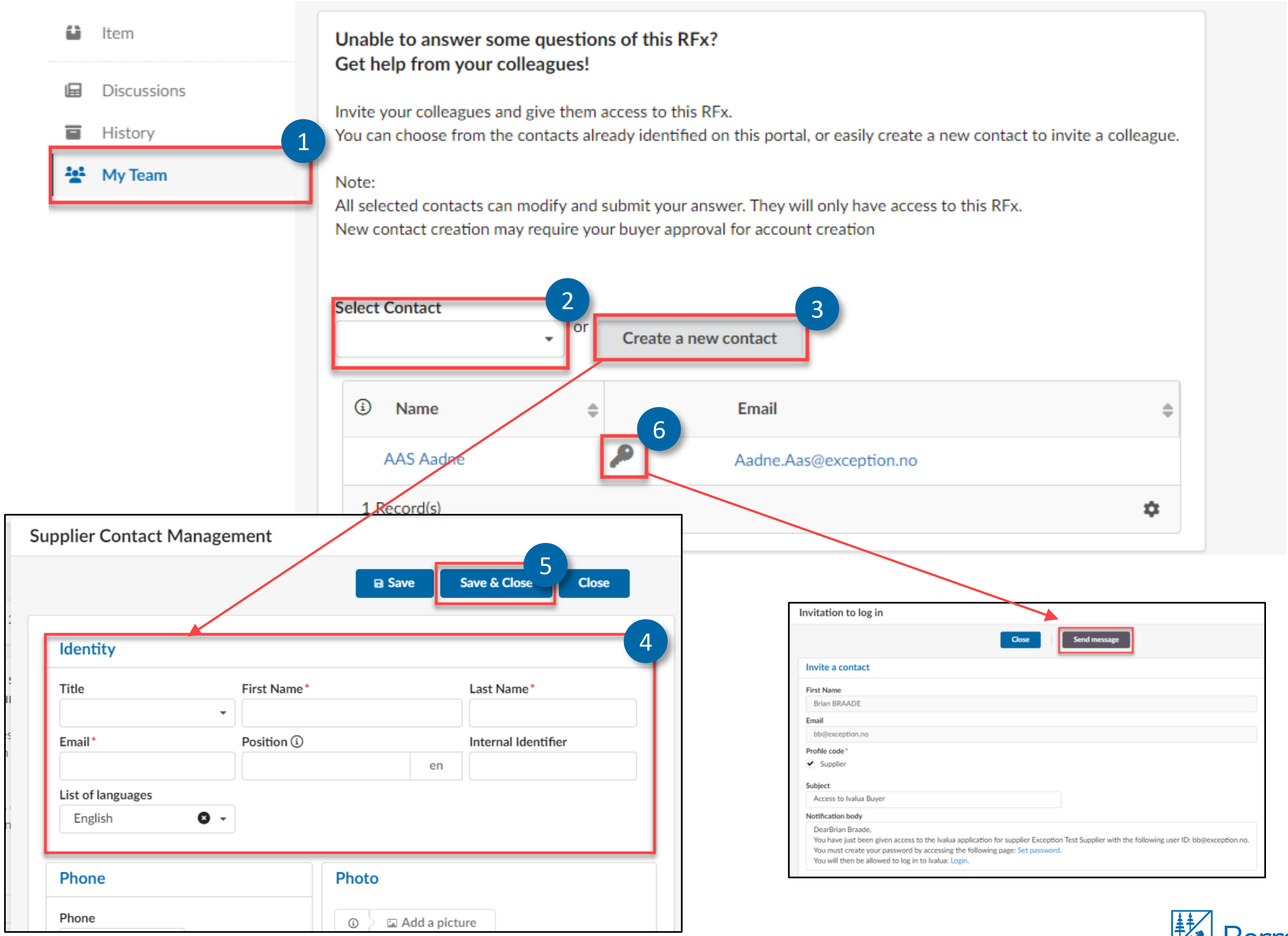
3 If you need to register a new user for your colleague, click on '**Create a new contact**'

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



Borregaard

03. Proposals

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

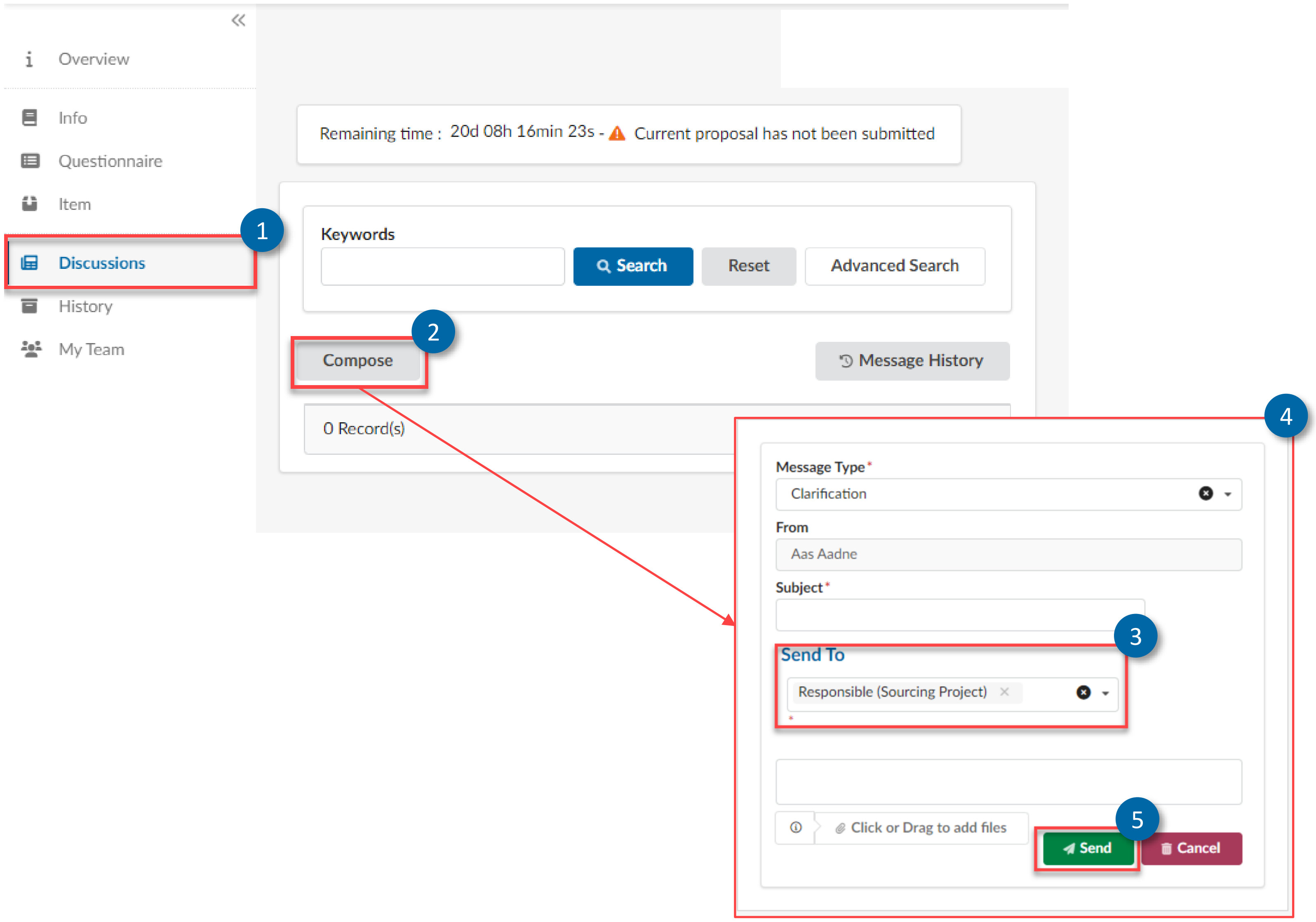
This section allows you to send message to the owner of the proposal at Borregaard, and to see earlier messages that you have sent, or messages which have been sent to you in relation to this proposal

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**



03. Proposals

03.5. Replace & submit new proposal

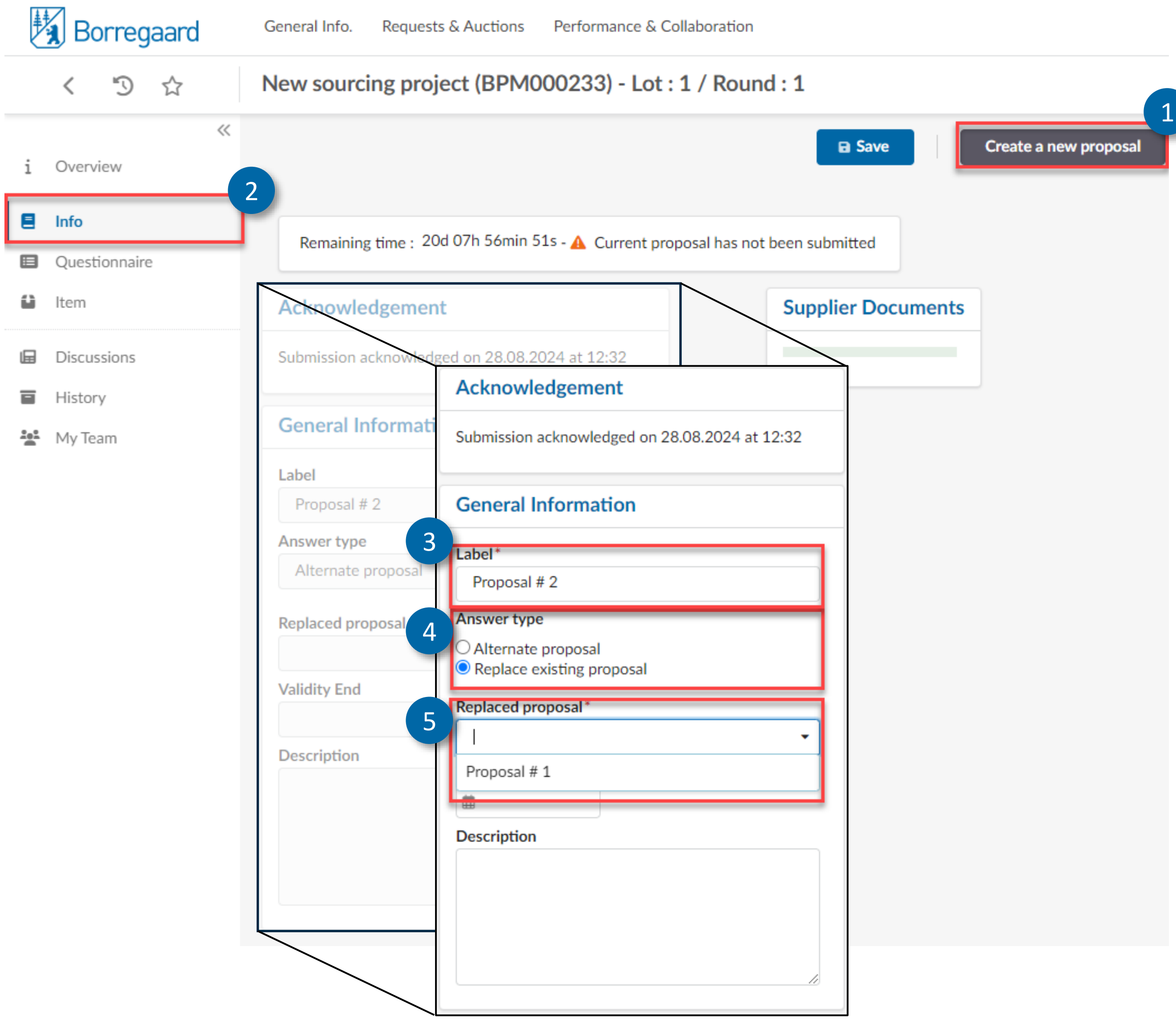
Replace & submit new proposal

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



Borregaard

04.
Maintaining supplier information

04.1. Request information change

Borregaard

Request information change (1/2)

Maintaining Supplier information: Request information change

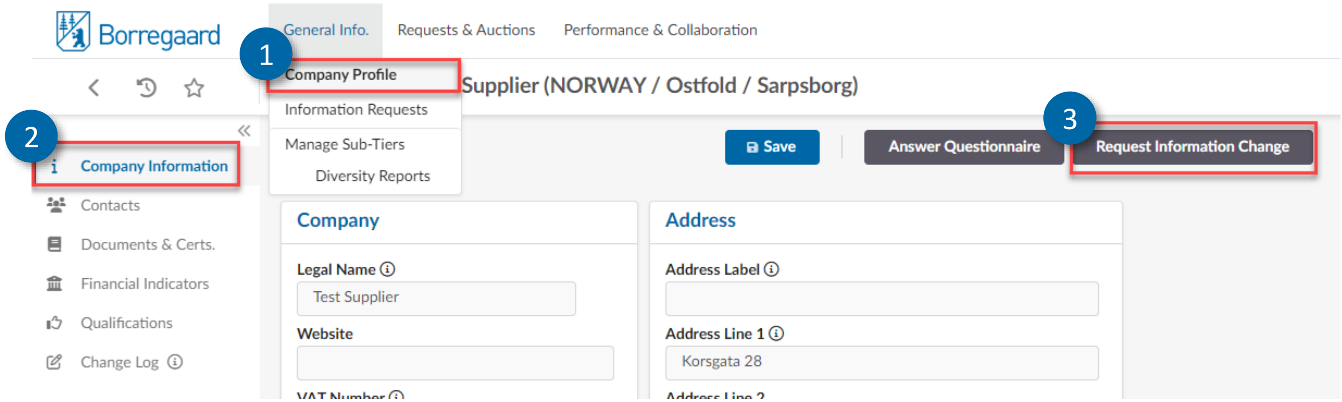
Once your company information has been registered, and the onboarding is complete, the information is locked, to avoid accidental changes.

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



Request information change (2/2)

Maintaining Supplier information: Request information change

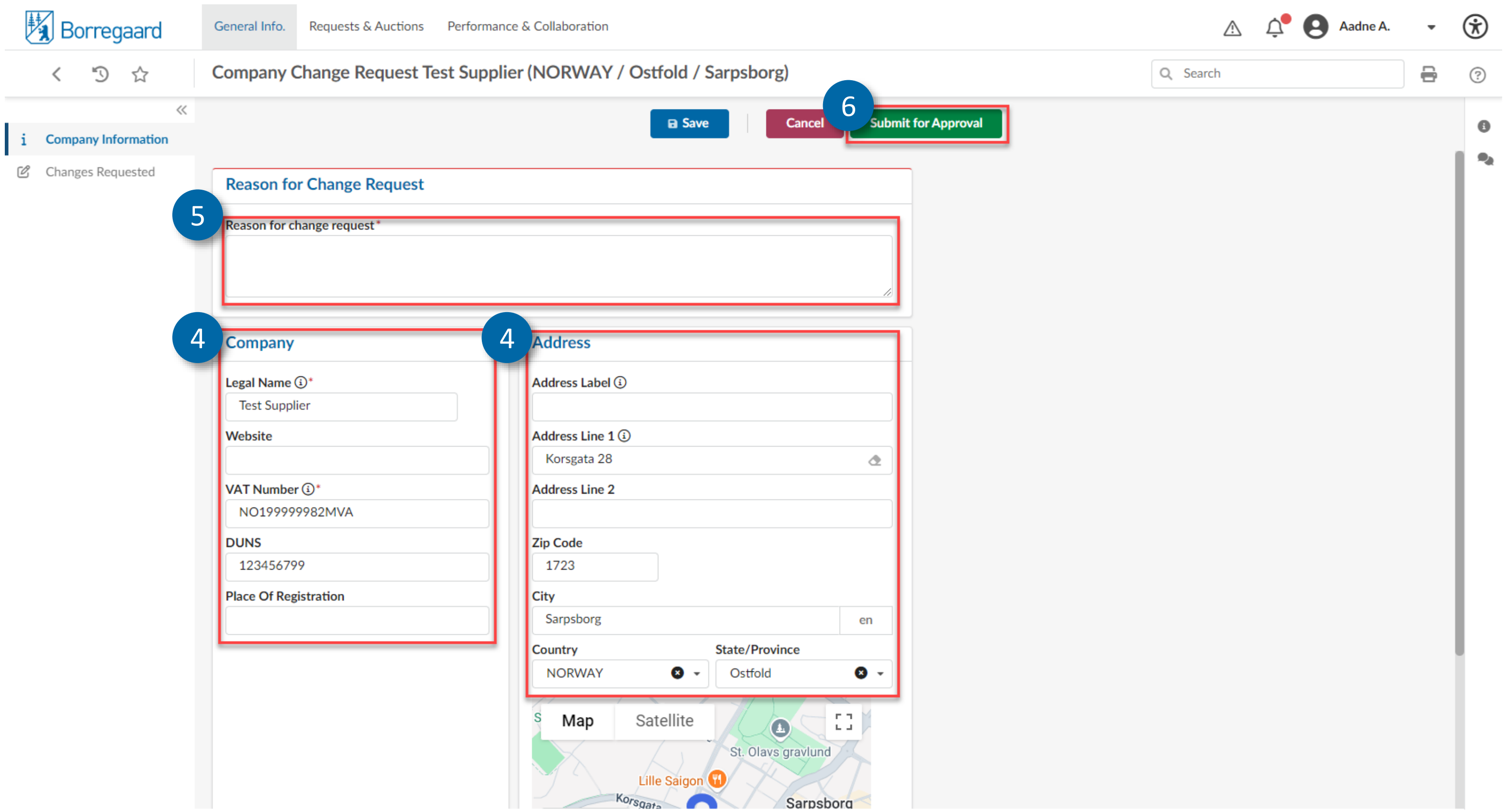
The **Company Information** page changes, to allow you to make the necessary changes

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

5 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

04.
Maintaining supplier information

04.2 Financial indicators

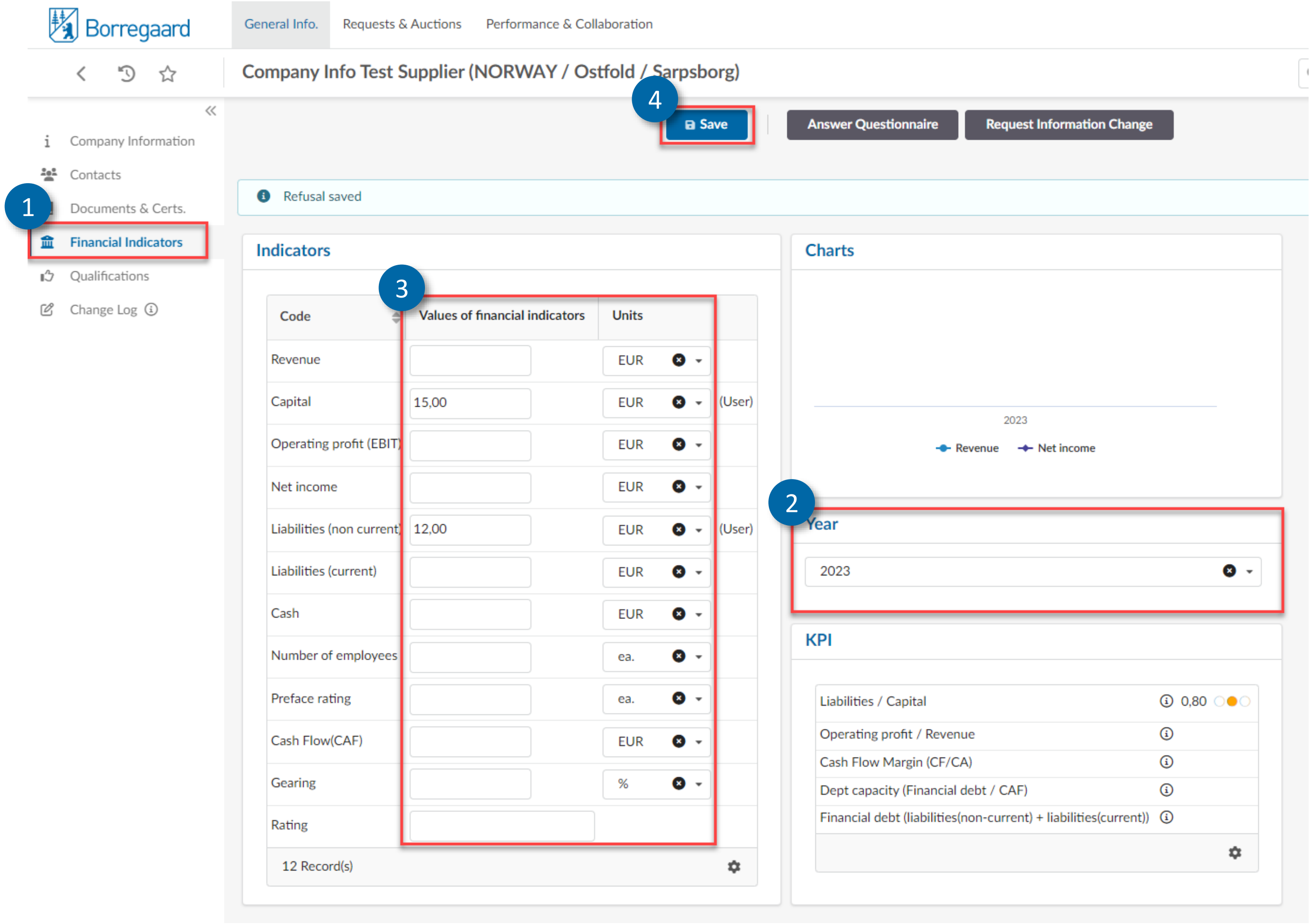
Financial Indicators

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



04.
Maintaining supplier information

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

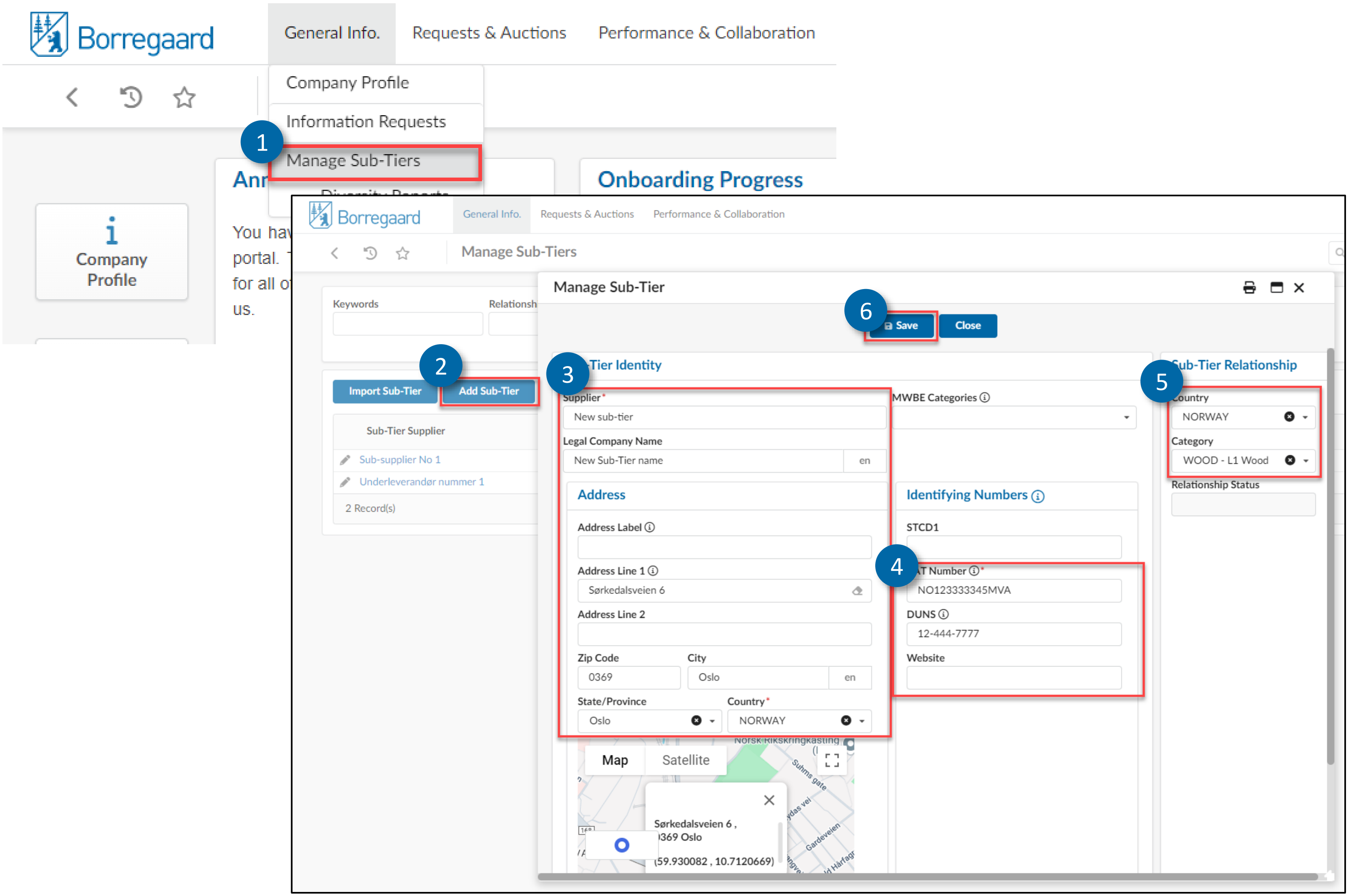
2 Click on **Add Sub-Tier** to add a new sub-tier supplier

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

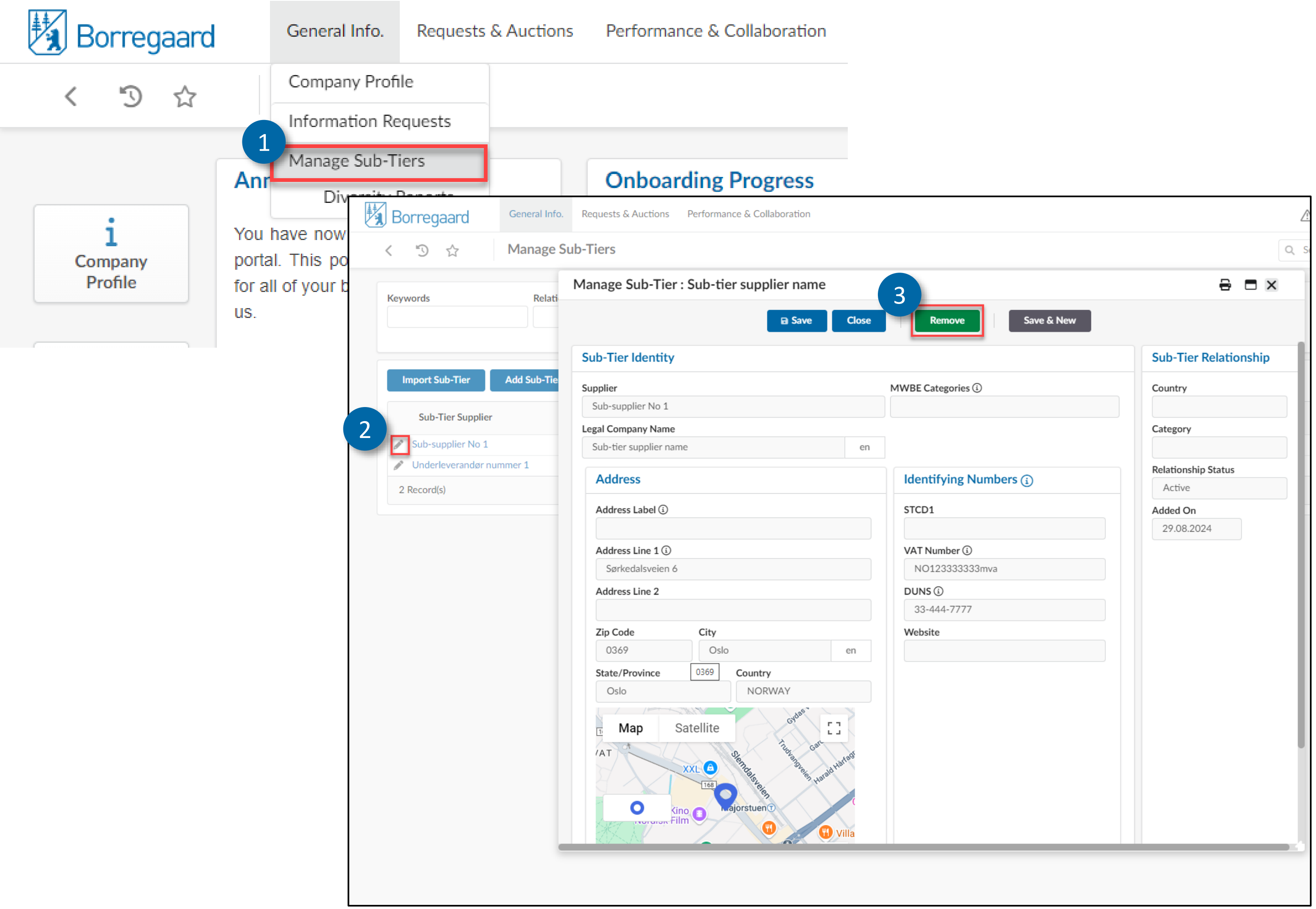


Sub-tier suppliers: Removing a sub-tier

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.



Borregaard

05.
Answering questionnaires

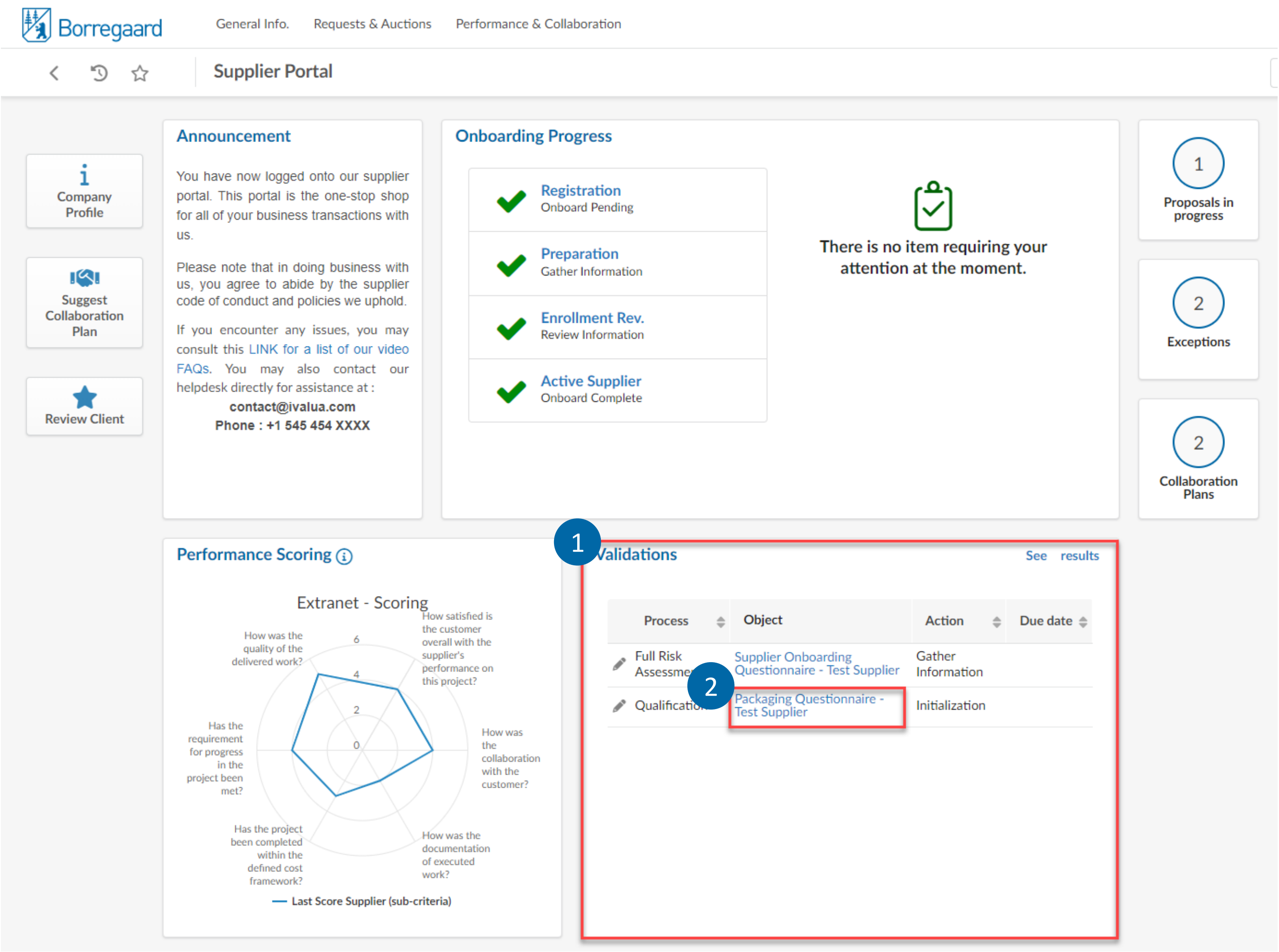
Borregaard

Answering questionnaires (1/2)

Answering questionnaires

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



Answering questionnaires (2/2)

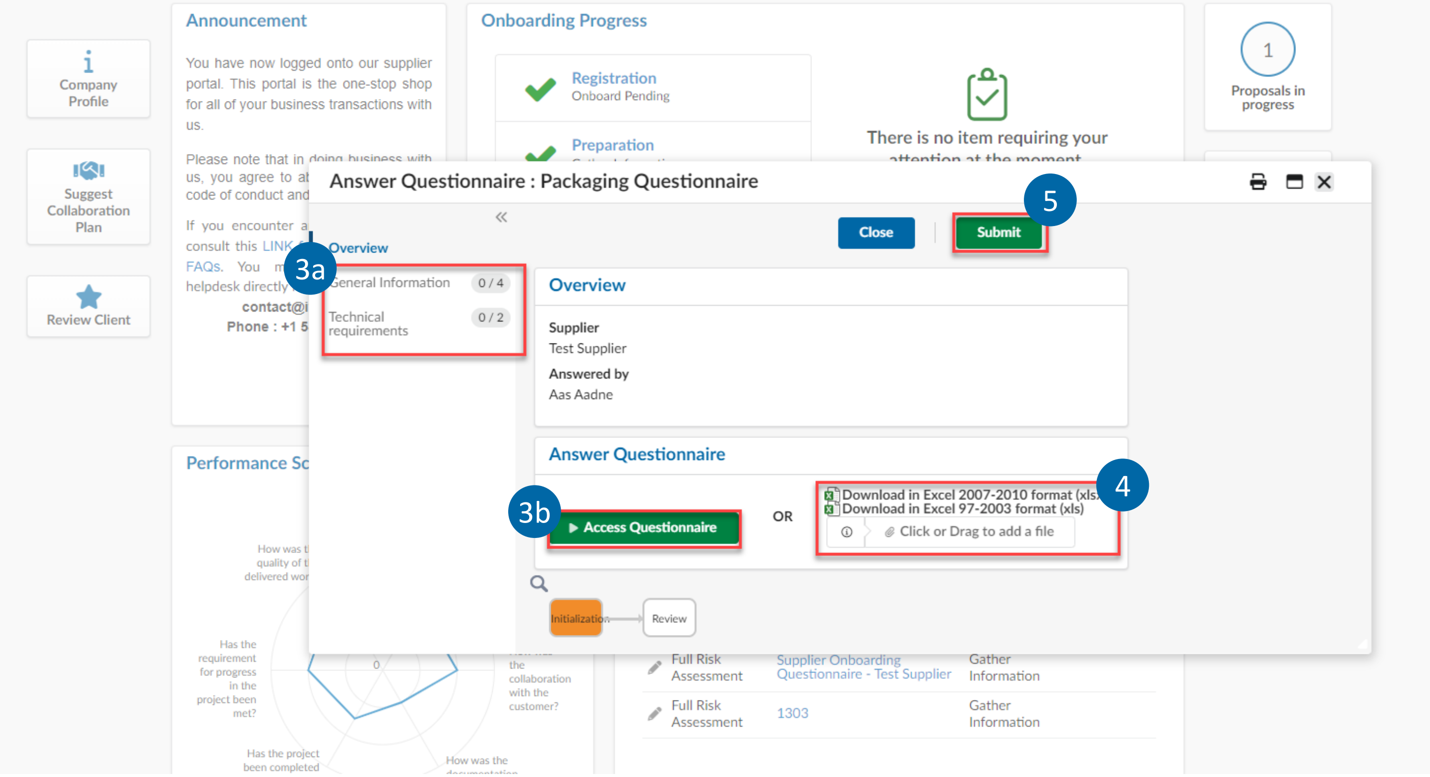
Answering questionnaires

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. 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

You will get error messages if you attempt to click on **Submit** if there are mandatory questions that you have not responded to



06. Handling exceptions

Borregaard

Handling exceptions

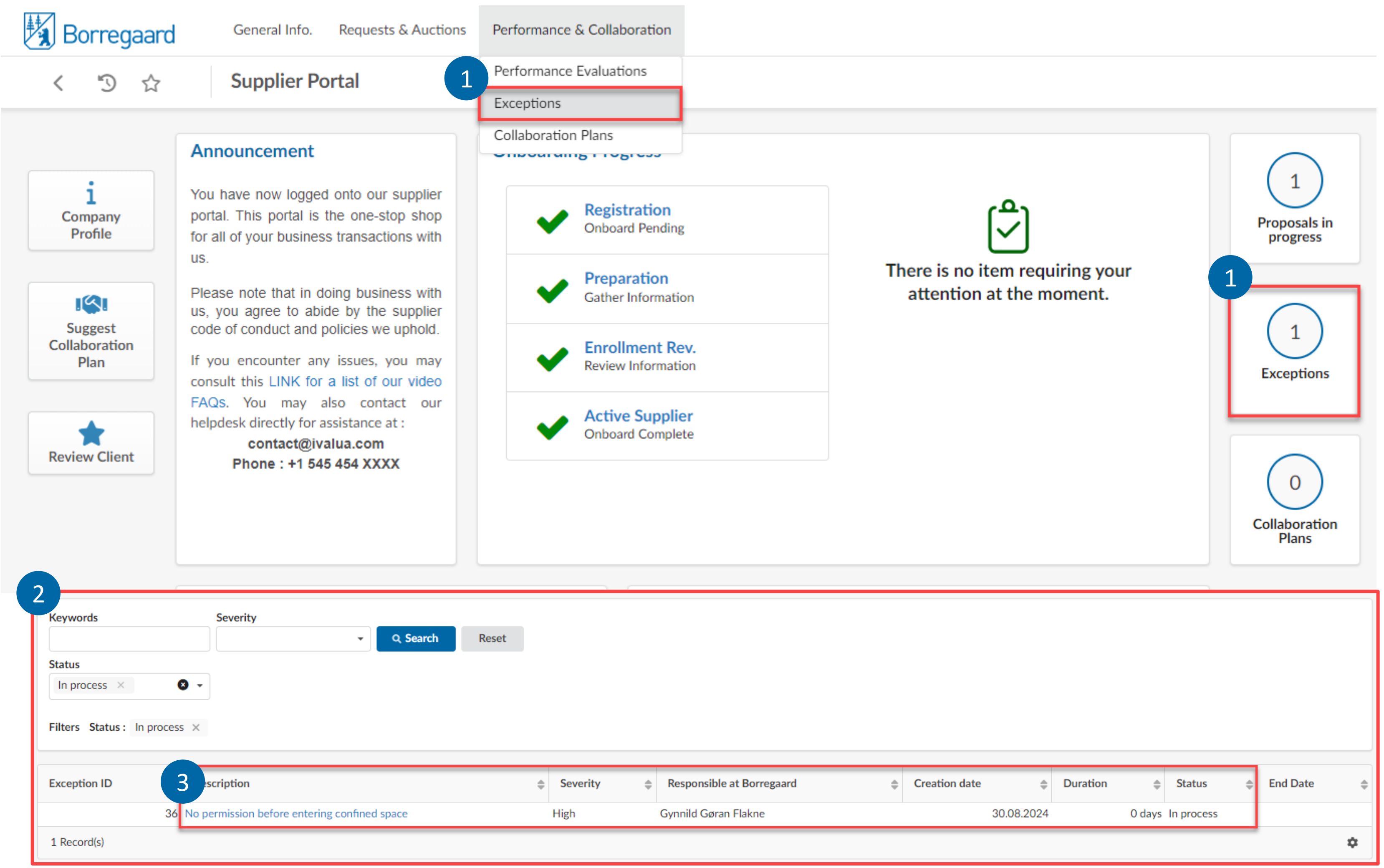
Handling exceptions

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

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



Borregaard

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

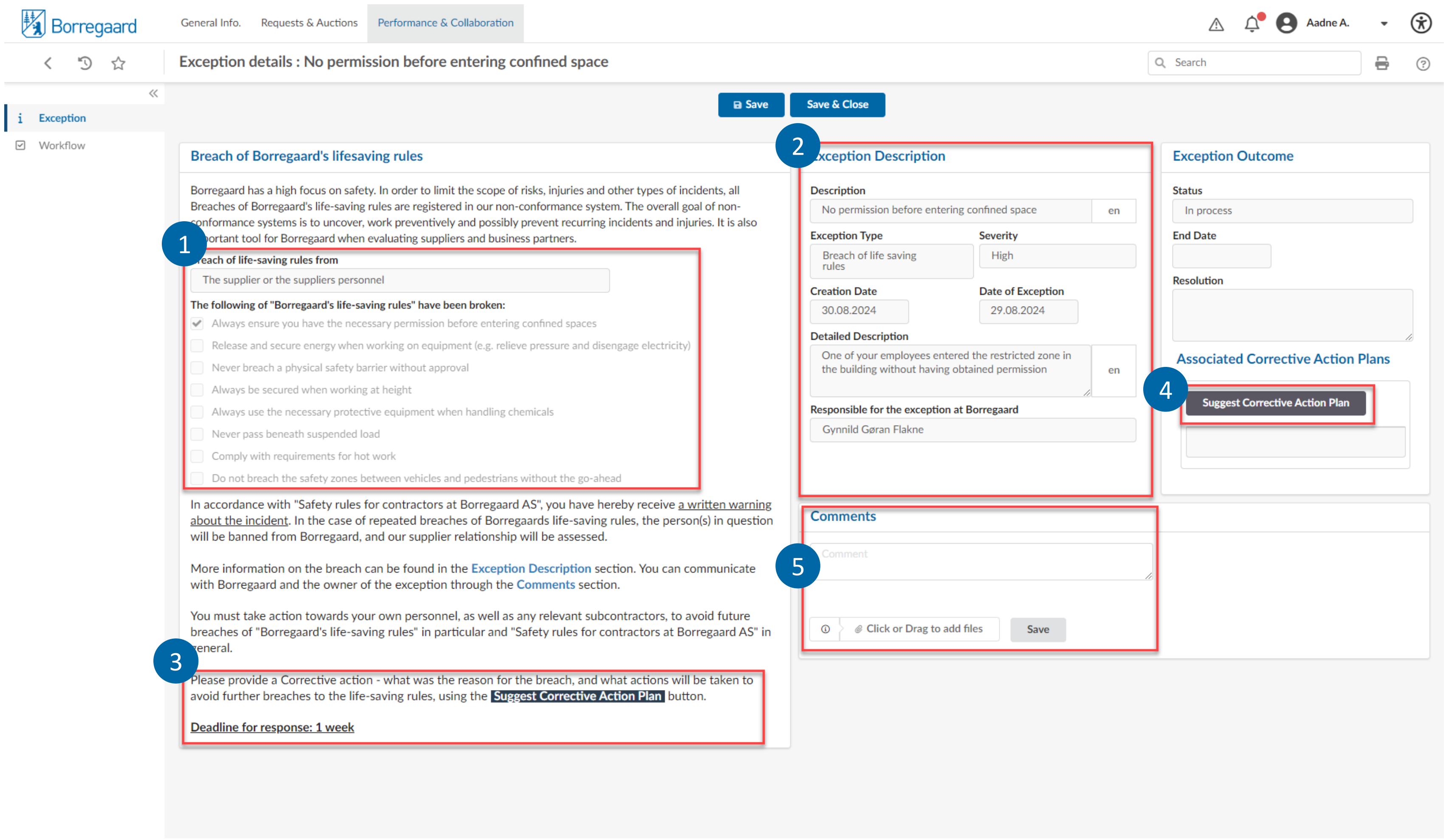
1 Whether the breach was by your company, or one of your sub-tiers, and which of the rules have been broken

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

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

4 Click on the **Suggest Corrective Action Plan** 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

Handling exceptions: Other types of exceptions

Handling exceptions:
Other exceptions

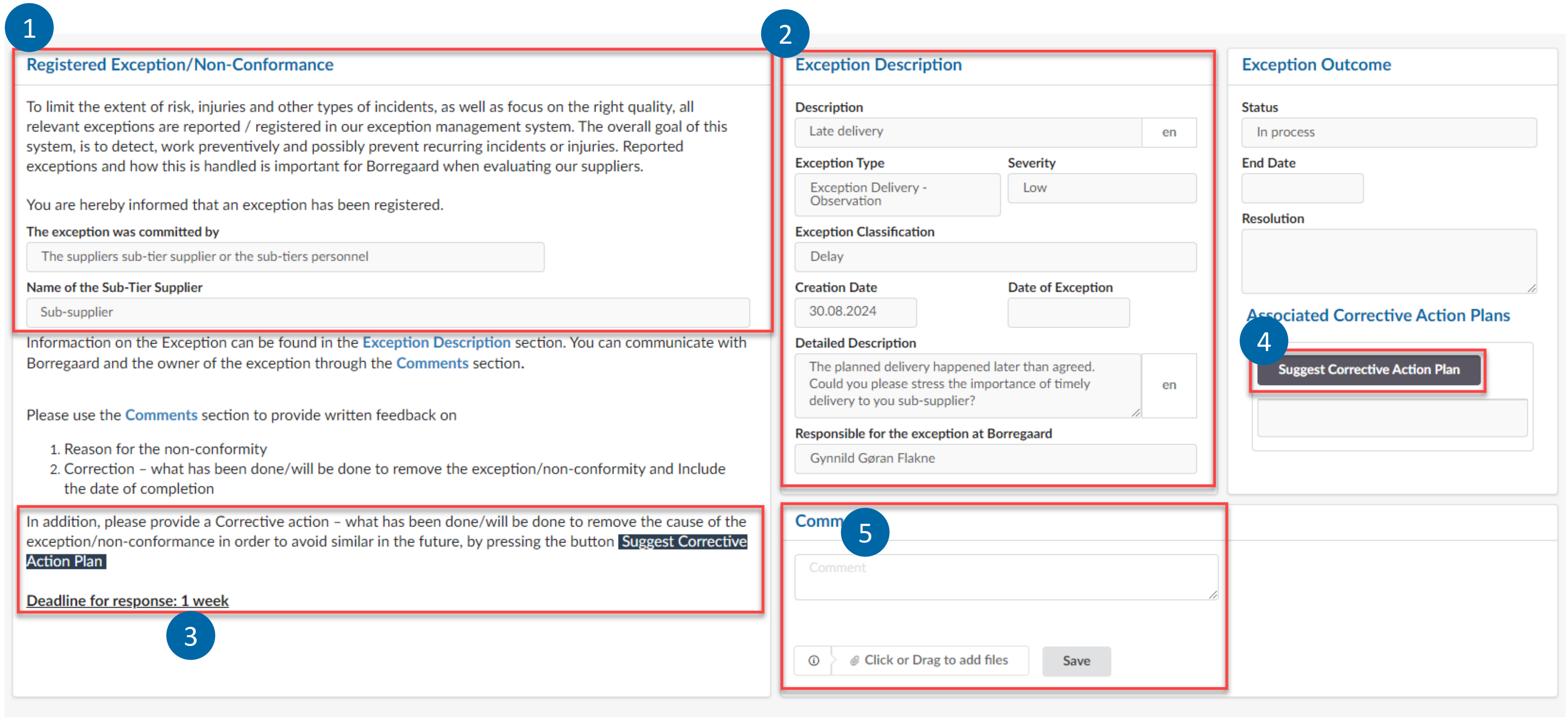
1 For other types of exceptions, the information under the exception gives an introduction to the exception handling, and informs you whether the exception was committed by your company, or one of you sub-tiers, as well as the name of the sub-tier supplier (if relevant)

2 The **Exception Description** states information regarding what type of exception, its severity, and details on the exception

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

4 Click on the **Suggest Corrective Action Plan** 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

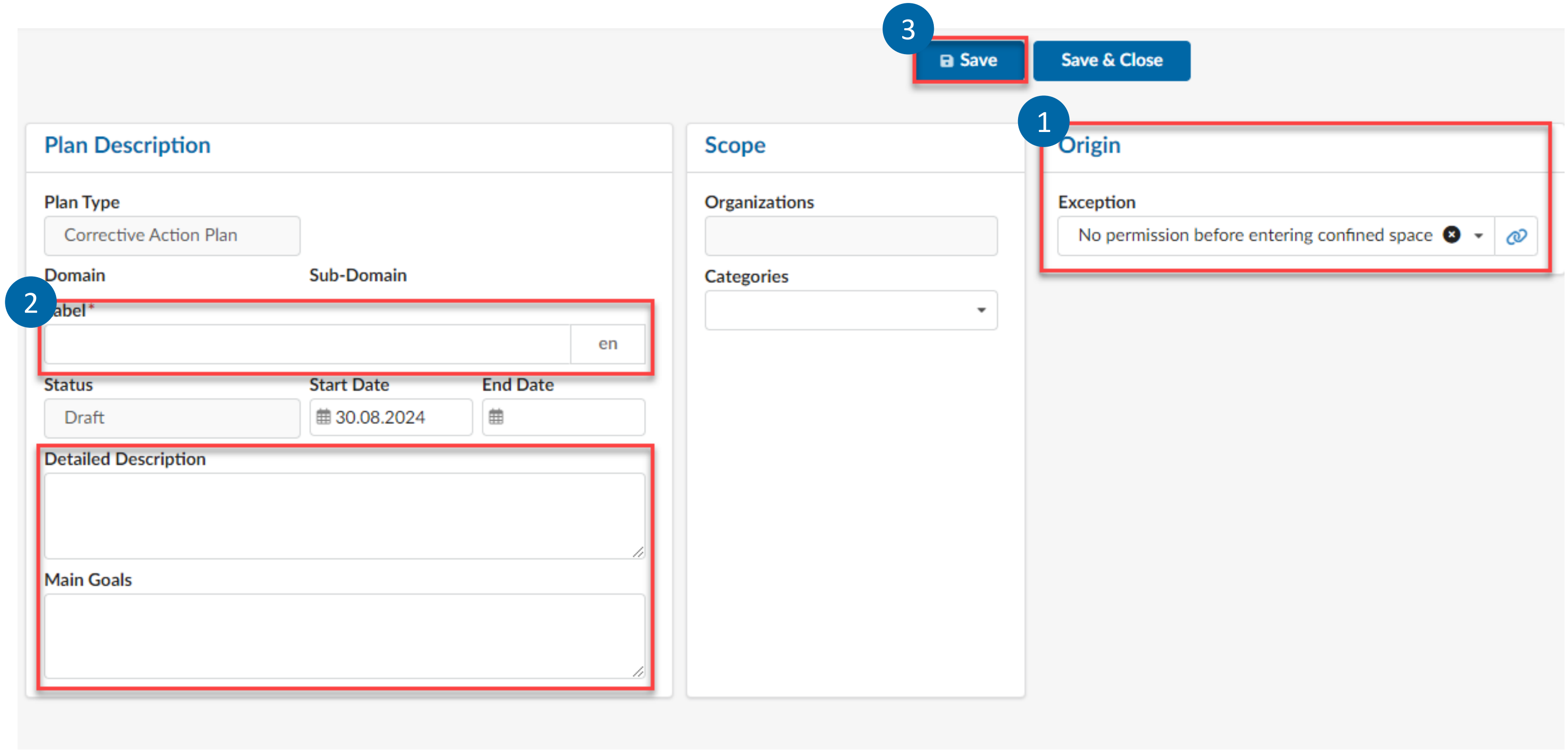
07. Collaboration plans

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



Borregaard

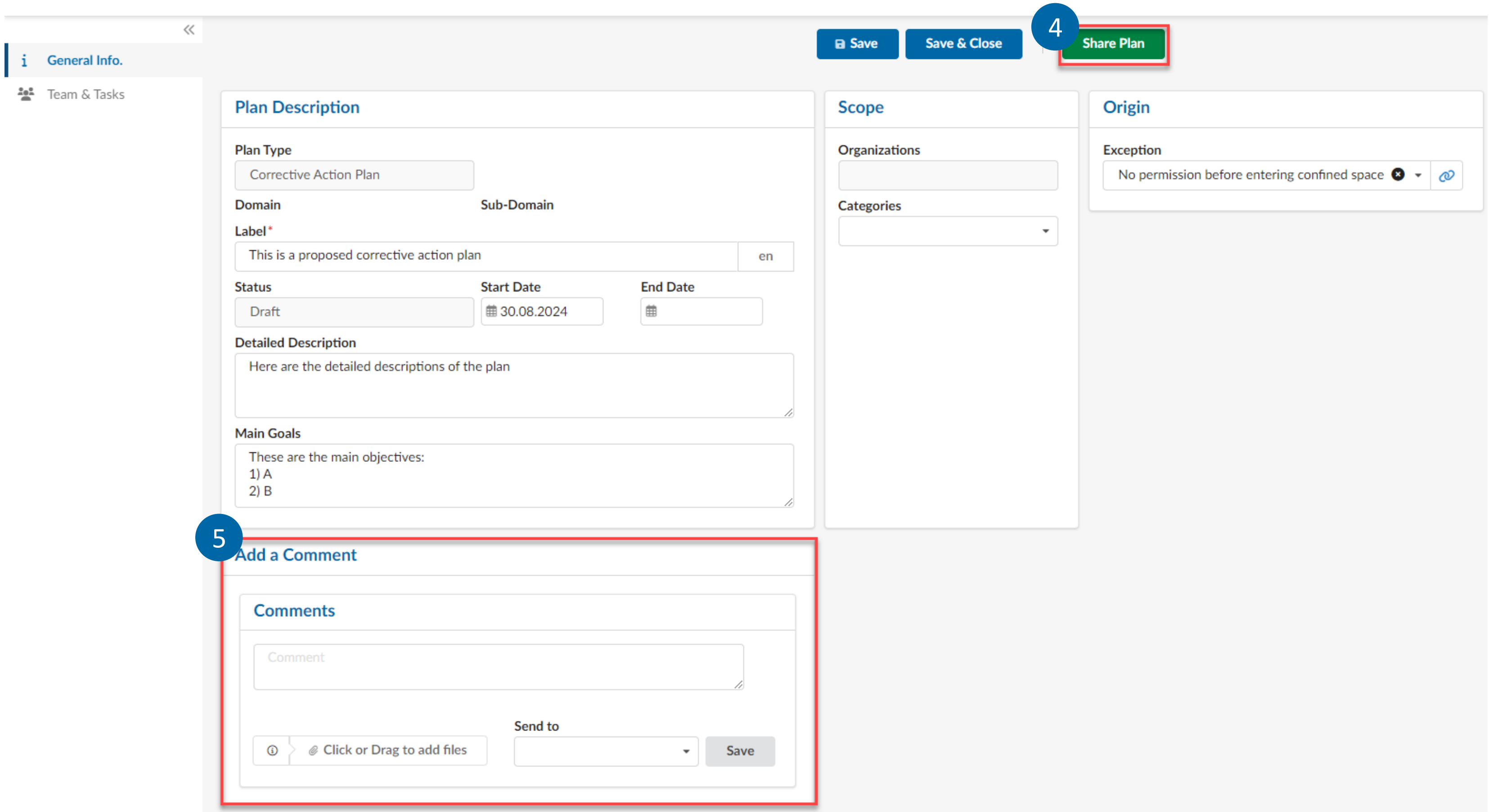
Collaboration plans: Create from exception (2/2)

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



Borregaard

Collaboration plans: Create from scratch

Collaboration plans: Created scratch

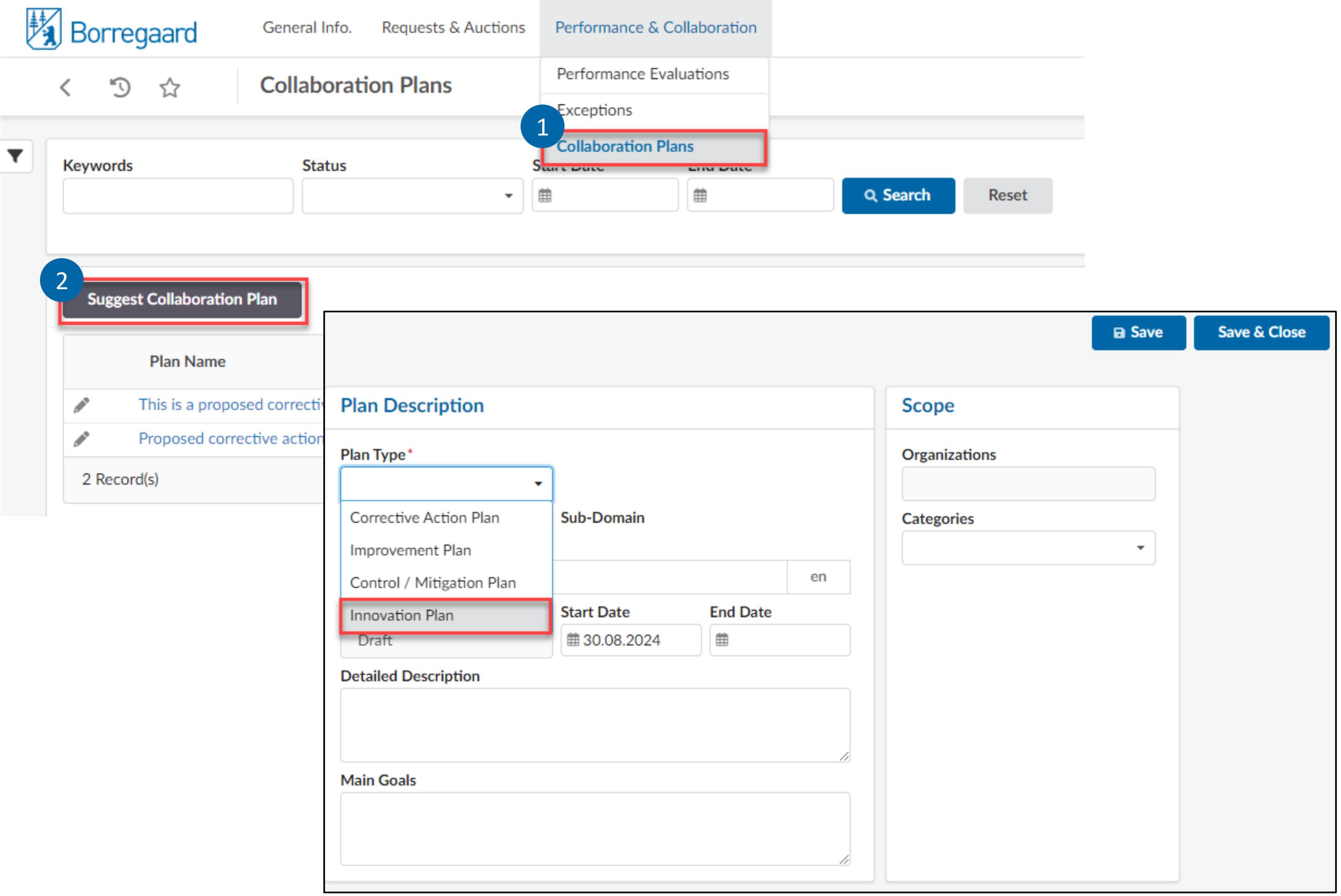
You can create a collaboration plan from scratch, if you for instance want to propose innovation plans with Borregaard

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




Borregaard