

A satellite with solar panels is in orbit above the Earth's surface, which is visible as a curved horizon with a blue atmosphere. The background is the dark void of space.

Ivalua Supplier Training

April 17, 2026



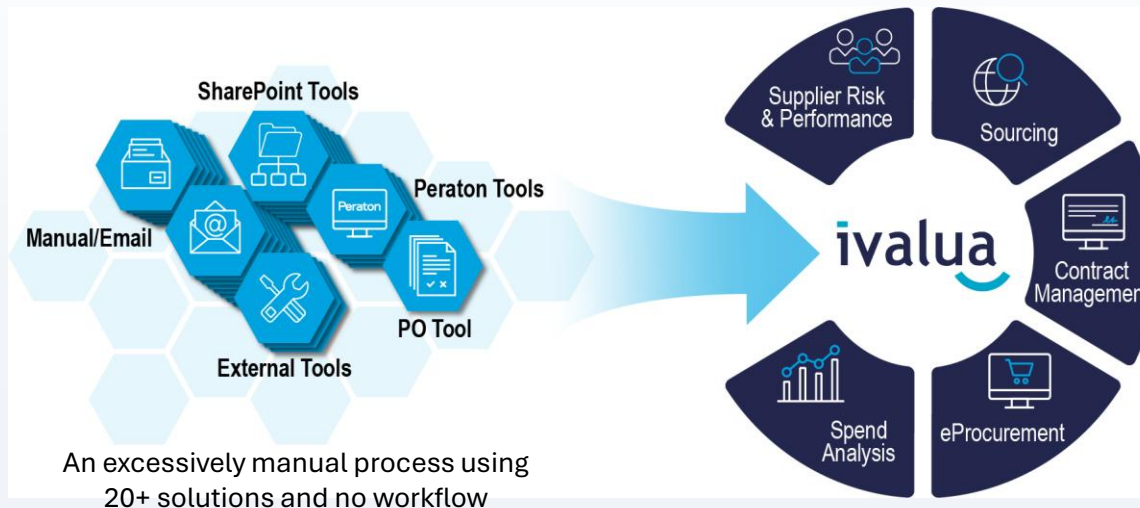
“Change is hard, but Ivalua isn’t!”

Author – Peraton Supplier

Mission

Implementing Ivalua is a major step forward in **modernizing our procurement process**. It consolidates our fragmented Procurement landscape into a **single digital Procurement source to pay solution** while achieving greater visibility, control, and efficiency across every transaction.

Current State



Future State

Phase 1 Scope

- » **Supplier Information Management**
- » **Sourcing & RFX**
- » **Supplier Agreements:** Non-disclosure Agreements, Teaming Agreements

1 Introduction

- Welcome
- Purpose & Objectives
- Foundation

2 Instruction & Demonstration

- Module 1: General Info
- Module 2: Agreements
- Module 3: Sourcing

3 Support

- Support Structure
- Support Resources

4 Closing

- Questions

Purpose

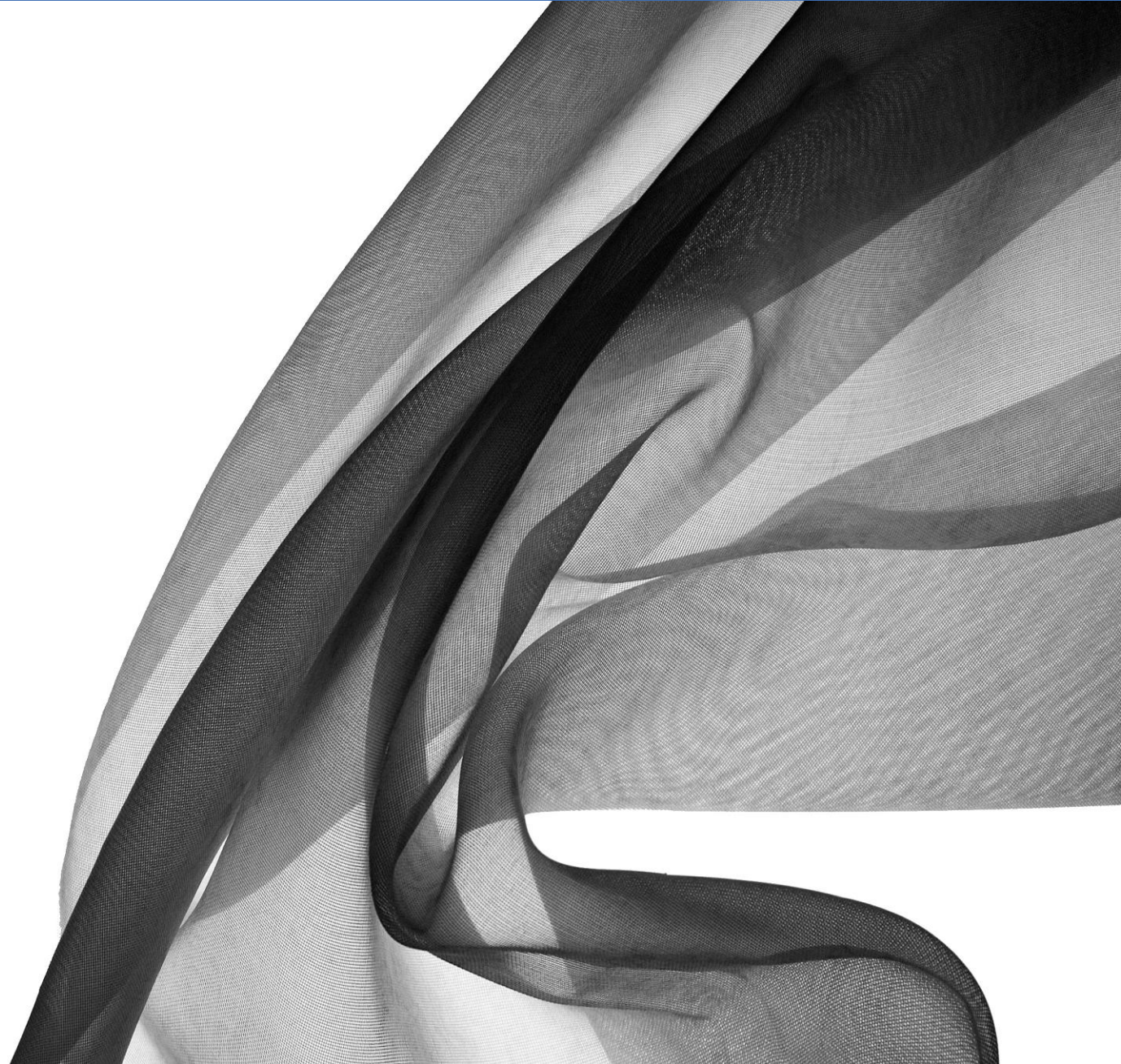
Our goal is to provide suppliers with the steps and instructions to effectively use our new Ivalua platform for supplier information management, agreement lifecycle management, and sourcing/RFx responses.

Objectives

Upon completion of this training suppliers will:

1. Understand what's changing.
2. Know key roles/responsibilities.
3. Use Ivalua's Supplier module to onboard and maintain supplier information
4. Use Ivalua's Agreements module to review, redline, and sign NDAs/TAs.
5. Use Ivalua's Sourcing module to submit, monitor, and negotiate proposals.
6. Identify key contacts and user references to support Ivalua use.

Foundation



Role	Then	Now
Supplier	Submitted company information, banking information, certifications and documents via e-mail	Start submitting company information fields, questionnaires, banking information, and documents in the Ivalua supplier portal
	Reviewed, redlined (when required), and signed NDAs and TAs via email.	Review, redline (when needed), and sign NDAs and TAs using Ivalua's "Agreement" module.
	Submitted proposals, received Peraton T&Cs, and negotiated terms and conditions and pricing via email.	Start submitting proposals, receiving T&Cs, and negotiating pricing and terms using Ivalua's Sourcing module.
	Managed subcontract agreements, MSAs, software agreements and modifications via email.	Continue managing subcontract agreements, MSAs, software agreements and modifications via email.
	Received notification of award via email with PO attached.	Continue receiving notification of award via email with PO attached.
	Submit invoices to Peraton via the Peraton AP email address.	Submit invoices to Peraton via the Peraton AP email address.

Supplier

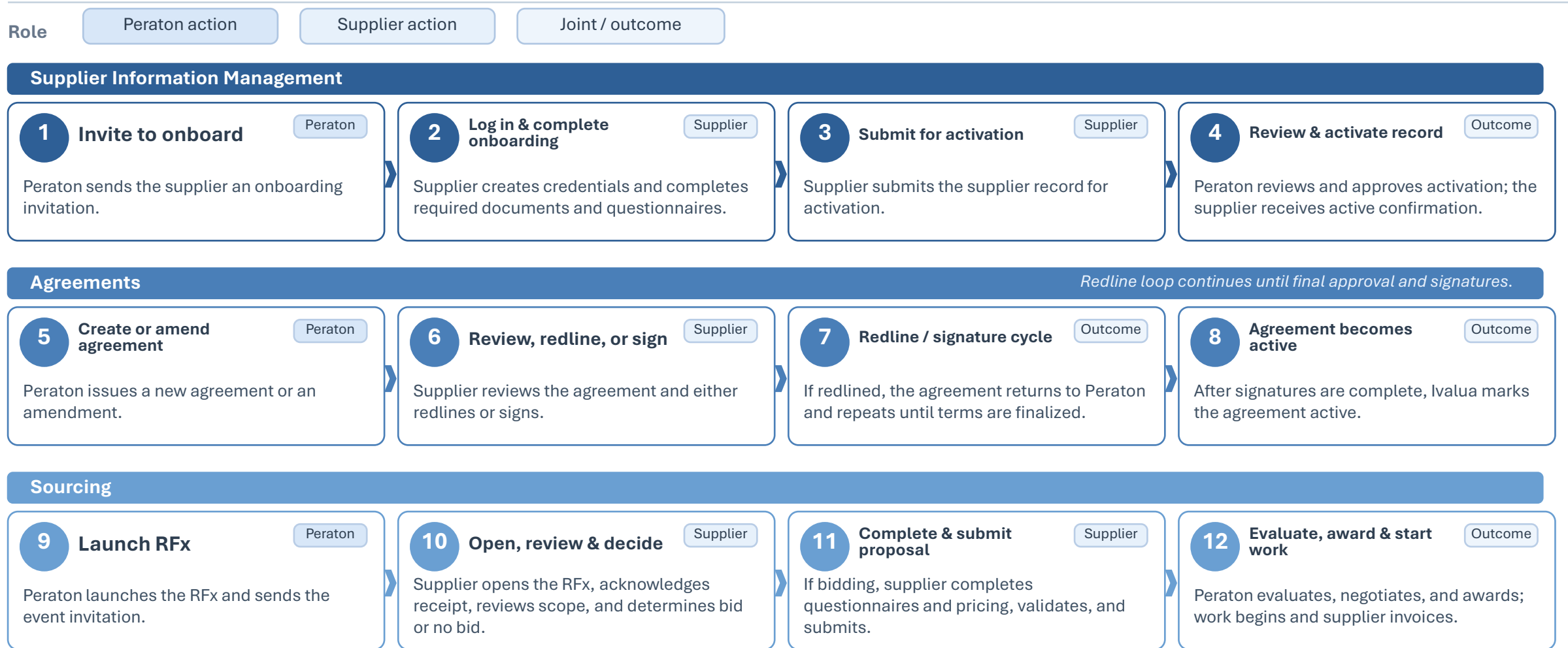
Accurately respond to RFX events, upload required documents, complete forms. Review, redline, and sign NDAs and TAs. Maintain compliant supplier information and questionnaires.

SCA/Buyer

Initiate supplier onboarding. Set up, author, and facilitate NDA/TA review, redlining, and sign off. Launch RFX and negotiate fair and reasonable pricing and terms. Conduct analysis that leads to supplier award.

Supplier Management Team

Oversees lifecycle of supplier records by approving supplier onboarding initiation and approving and validating supplier supporting documentation and requested changes.



Module 1: General Info

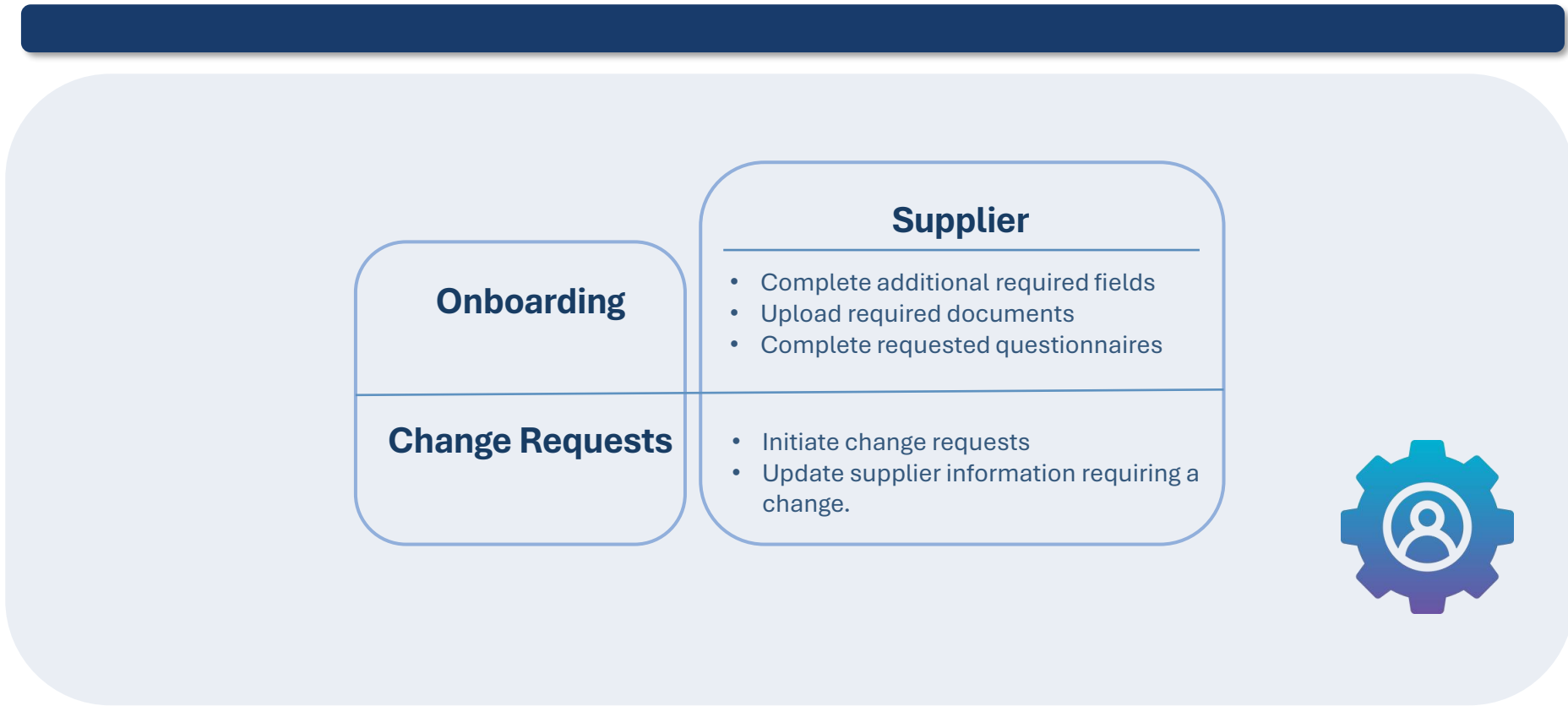
Purpose

Our goal is to provide suppliers with the instruction to onboard and maintain supplier information using our new Ivalua platform.

Objectives


Upon completion of this module end user will:

1. Know how the onboarding process works
2. Identify required fields and documentation
3. Understand how to initiate a supplier information change requests
4. Understand key watchouts




Module	Start	Stop	Continue
<p data-bbox="129 634 343 672">Onboarding</p> <p data-bbox="155 933 326 1015">Change Requests</p>	<ul data-bbox="435 558 1006 1076" style="list-style-type: none"><li data-bbox="435 558 1006 654">• Complete required fields and questionnaires in Ivalua (Reps/Cert, Export Compliance, etc.)<li data-bbox="435 662 1006 725">• Upload necessary supplier documents directly through the Supplier Portal<li data-bbox="435 733 1006 758">• Complete any requested Questionnaires <li data-bbox="435 911 1006 973">• Initiate changes to supplier information in Ivalua<li data-bbox="435 982 1006 1076">• Update supplier information in Ivalua and update documents based on system expiration alerts	<ul data-bbox="1154 558 1742 973" style="list-style-type: none"><li data-bbox="1154 558 1742 658">• Emailing forms such as Reps and Certs, Business Size Classification, Cybersecurity, etc.. <li data-bbox="1154 911 1742 973">• Initiating Supplier Information updates via email	<ul data-bbox="1872 558 2415 996" style="list-style-type: none"><li data-bbox="1872 558 2415 629">• Providing required compliant supplier information <li data-bbox="1872 896 2415 996">• Keeping Peraton apprised of supplier information changes that affect our partnership

General Info




Value module tab that allows suppliers to know where the supplier is in the onboarding process. Once onboarded, alerts and validations for supplier action are shown here.

Agreements



Where NDAs, TAs, and Subcontract Agreements are stored.

Sourcing



Here suppliers can manage any proposal activities they are currently engaged in.

Company Profile



Captures supplier identifiers and administrative data.

Contacts



Stores information on internal and external contacts related to the supplier. Internal contacts refer to Peraton employees managing the supplier, while external contacts are supplier employees authorized to log into the Supplier Portal.

Documents & Certs



Allows supplier contacts and internal users to upload required legal documents, certifications, tax exempt certificates, and other documents. Once supplied, documents can be downloaded from this screen. Document expiration and validity is tracked here.

P2P Information



Stores the supplier's payment and account information, banking information, address information, and punchout or connection parameters.

Qualifications



View questionnaires sent to suppliers and their responses. Manage organizations, commodities, and regions served by the supplier. Supplier eligibilities are tracked on this tab.

Onboarding



Supplier completes company information; uploads needed documentation and enters banking information.

Change Request



Allows vendors to update company profile data via the external supplier portal.

EIN/SSN



Company tax identifier.

Legal Structure



Shows how your company is organized legally and taxed.

Approved System Letter



Approved accounting systems or approved Government Property System letters.

Quality Certifications



Any quality certifications that your company possesses, such as ISO.

Order Address



Your company address that should match what is listed on the Company Information screen.

Questionnaire



Questionnaires are required for certain programs or compliance reasons.

Qualifications



Where completed questionnaires are stored.



≡ Answer Questionnaire ▾

Annual Representations and Certifications

Cybersecurity Questionnaire

EEO & Affirmative Action Compliance Certification

Executive Compensation Certification

Export/Import/Trade Compliance Certification

Independent Contractor Questionnaire

Supplier Onboarding Progress

- **Preparation**
Registered through self-registration or internal creation (internal creation is not preferred).
- **Enrollment Preparation**
Onboarding has started and data is being gathered.
- **Review**
Full supplier record is in internal review; documents and questionnaires may also be under review at the same time.
- **Active Supplier**
Supplier is fully onboarded and active.

Initial Banking Information (Onboarding)

- Supplier enters banking information and selects Submit for Approval.
- The workflow auto-approves the information.
- Status changes to Validated.

Validated



Banking Information Changes (Active Supplier)

- Supplier selects Edit, makes updates, and submits for approval.
- Once approved, the workflow updates to Approved and the new banking information is assigned Validated status.

Validated

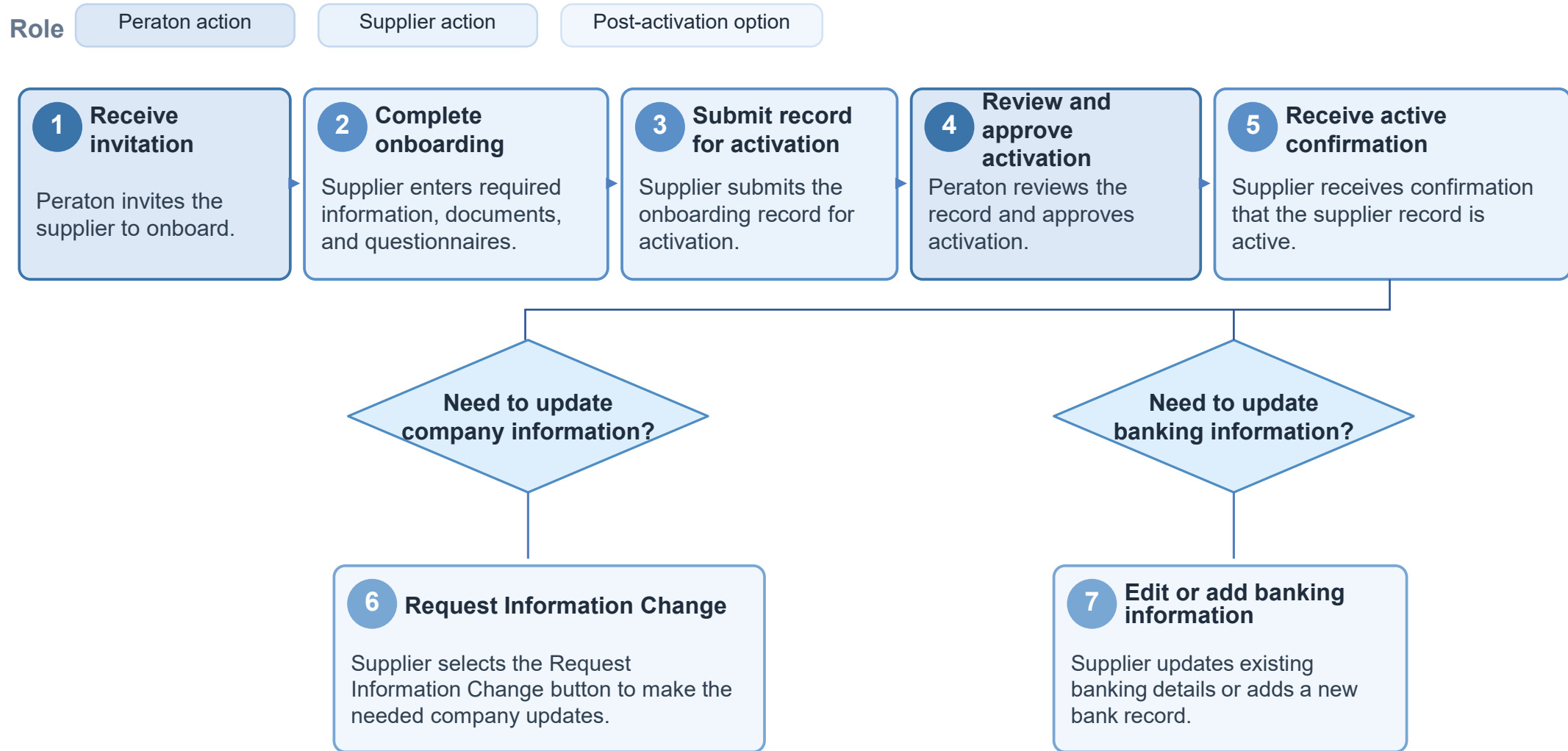


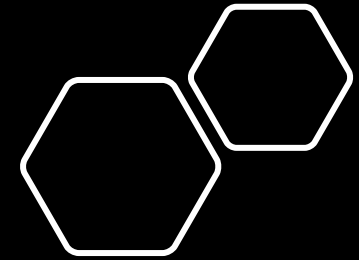
Banking Information Additions (Active Supplier)

- Supplier adds new banking information and submits for approval.
- When approved, the workflow updates to Approved and the new banking information is assigned Validated status.

Validated







Potential Risks & Considerations

- Don't forget to save your data on each screen.
- Pay attention to what Ivalua is requiring you to do by observing alerts, blocks and messages displayed on the right panel.
- Entering incomplete information can prevent Ivalua from allowing supplier information inputs/changes. Include all required information and documents.
- Only one information request can be performed at a time. Ensure that a change request is complete prior to starting a new one.
- Missing change request documentation will prevent you from submitting the change for approval. Ensure to provide the reason for the change request or when changing banking info or name changes.



Key points to remember

1

Ivalua captures relevant information and documentation for compliant awards

2

Ivalua allows suppliers to own and manage supplier information

3

Ivalua helps keep company information accurate and up to date

4

Ivalua enables seamless collaboration between suppliers and Peraton

5

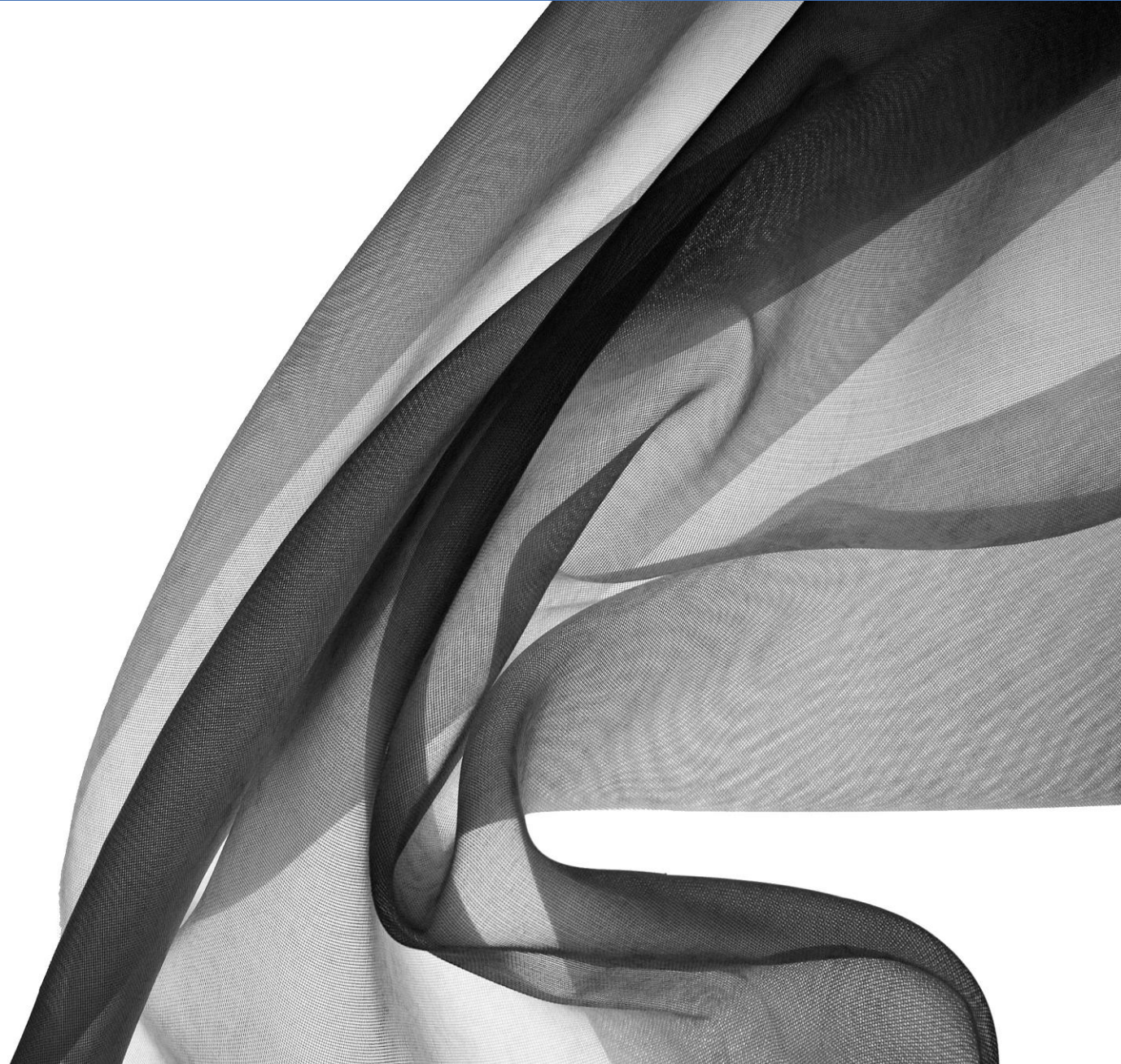
Ivalua reduces/eliminates backlog in email communications

6

Ivalua provides quick access to agreements and sourcing activities directly from the supplier record

The General Info module enables suppliers to maintain compliant supplier information.

Module 2: NDA/TA



Purpose & Objectives

Purpose

Our goal is to give suppliers the knowledge and instruction to use our Ivalua Agreements module to review, negotiate where applicable, and sign non-disclosure agreements and teaming agreements.

Objectives

Upon completion of this training suppliers will:

- Understand what's changing (then vs now)
- Understand role/responsibility
- Know how to use the "Validations" list on the Supplier Portal homepage
- Review, redline and sign an NDA/TA
- Export NDA/TA documents to Word/PDF
- Use Ivalua chat for communication with Procurement staff
- Identify key watchouts



* Using Ivalua has allowed Peraton to streamline gathering supplier information. You'll notice that certain information required at the transaction level (i.e., reps/certs) are now maintained at the supplier level. This reduces the number of times you're required to provide the information.

Validations



A list of up to three Ivalua objects located in the dashboard section of the Supplier portal homepage that need actioned (i.e., review, sign-off, or questions answered) by the supplier.

Edit Button



Allows the supplier to redline an agreement including comments.

Agreement Details



An agreements page which shows general information, negotiated terms, and validity (i.e., PoP, and signature date).

Reject Button



Allows the supplier to reject providing an agreement signature.

Hierarchy



A page in Ivalua which lists the main agreement and any amendments or sub agreements

Return to Peraton Button



Allows the supplier to return a redlined agreement back to Peraton.

Documents



A page in Ivalua that allows you to download the agreement document to Word or PDF. Additionally allows you to view the agreement in Ivalua when clicking the edit pencil.

Approve Button



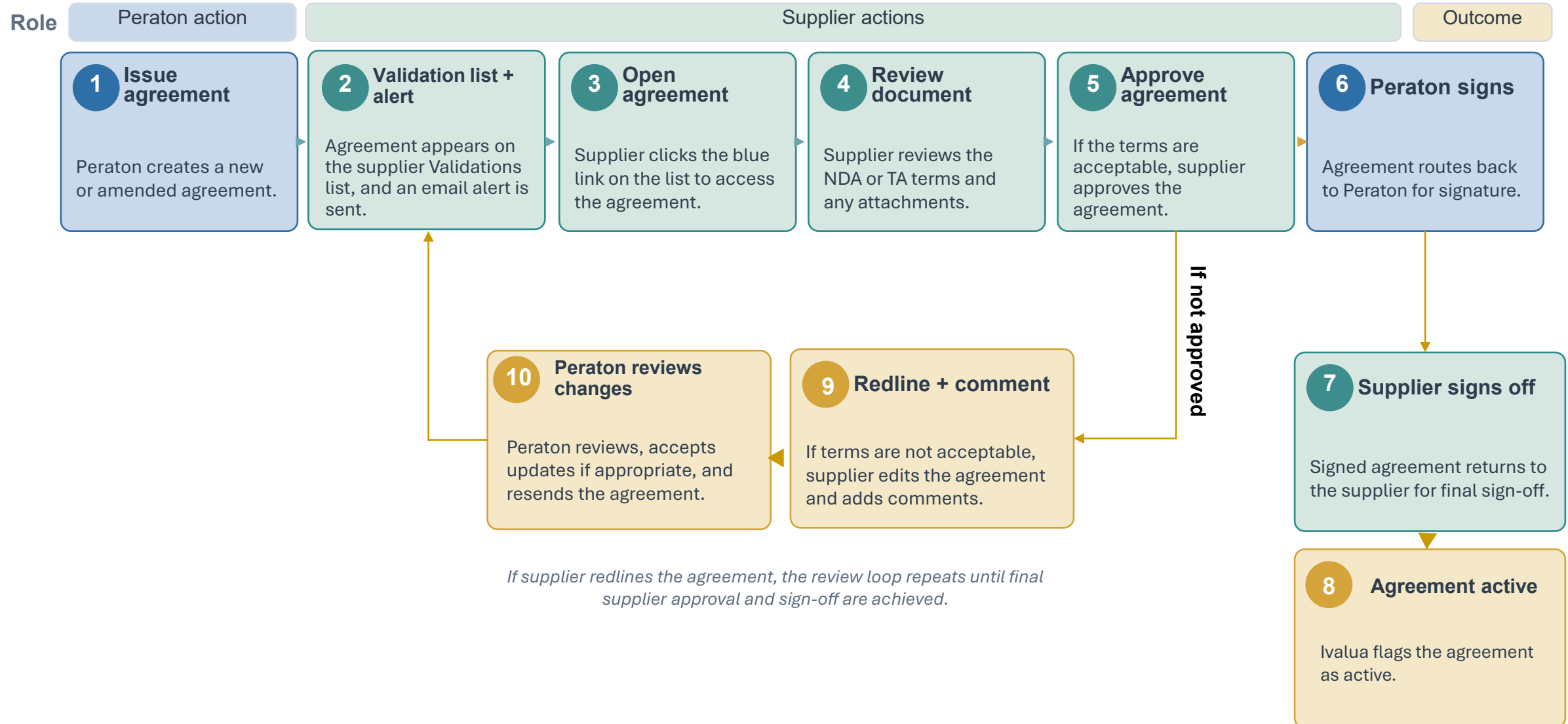
Allows the supplier to approve an initial draft of an agreement.

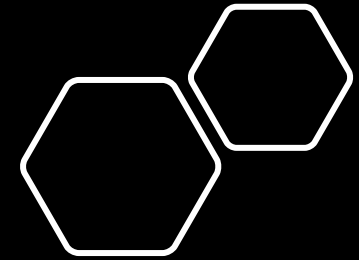
Sign Button



Allows the supplier to sign off on an agreement.

Visual End to End Agreement Process





Key Watch Outs

Potential Risks & Considerations

- Ensure that you have access to Ivalua to receive notices when an agreement is issued.
- Pay attention to “Validations” listed on the Supplier Portal homepage or listed on the “Validations” page accessed via the “pending validations” options accessible via the notification bell.
- Highlight the full text of the redline when providing comments.



Summary

Key points to remember

1

Supplier can use validate list to navigate to agreements pending review and sign off.

2

Supplier will use the “Edit” function to redline and provide comments.

3

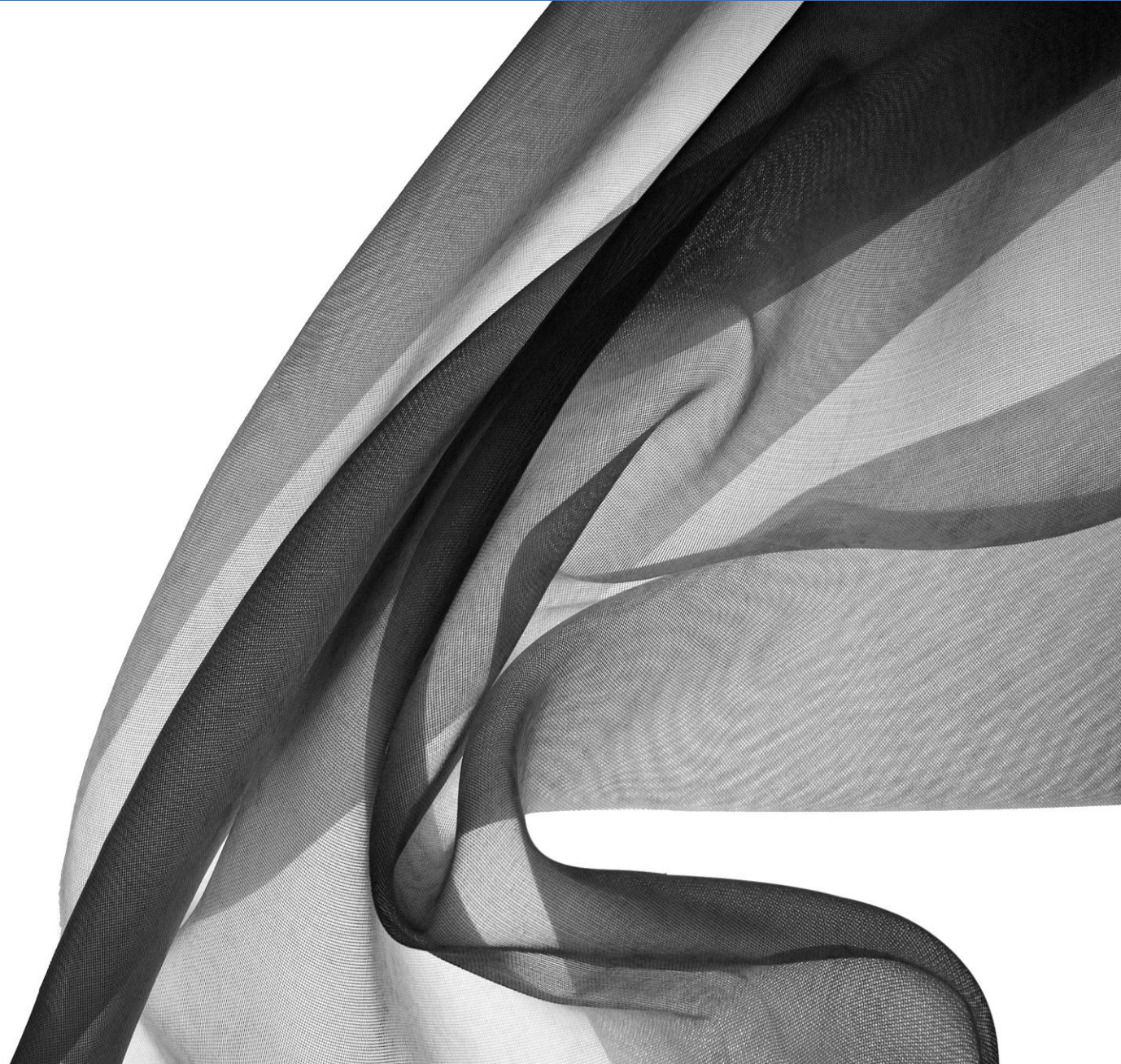
Redlines trigger the agreement to return to Peraton for review and approval

4

Suppliers can export NDA/TA documents to Word or PDF for further review.

The agreements module enables suppliers to review, redline, and sign NDAs and TAs.

Module 3: Sourcing/RFx



Purpose & Objectives

Purpose

Our goal is to give suppliers the knowledge and instruction to effectively use our Ivalua Sourcing module participation in sourcing events via RFx submissions.

Objectives

Upon completion of this training suppliers will:

- Understand what's changing (then vs now)
- Understand role/responsibility
- Receive, manage and respond to RFx
- Answer questionnaires
- Complete pricing grids and/or download/upload
- Check RFx status
- Use Ivalua chat for communication with Procurement staff

The screenshot displays the Peraton Supplier Portal interface. At the top, there is a navigation bar with the Peraton logo, menu items for 'General Info.', 'Sourcing', and 'Agreements', and a user profile for 'Dee S.'. Below the navigation bar, the page title is 'Supplier Portal' with a search bar on the right. The main content area is divided into several sections:

- Announcement:** A text block providing information about the supplier portal and a link to video FAQs.
- Onboarding Progress:** A section with a list of onboarding steps, each with a green checkmark: 'Preparation Onboard Pending', 'Enrollment Prep Gather Information', 'Review Review Information', and 'Active Supplier Onboard Complete'. To the right of this list is a yellow warning box titled 'The following items require your attention:' containing three items: 'Missing Mandatory Document(s)', 'Change request in progress', and 'Missing Required Questionnaire: Annual Representations and Certifications'.
- Validations:** A section with a table of validation results and a 'See 2 result' link.

The 'Validations' table is as follows:

Process	Object	Action	Due date
Qualification	FRM-04-04 Annual Representations and Certifications - Deborah CORP2	Initialization	
Qualification	General Supplier Information - Deborah CORP2	Initialization	

To the right of the screenshot, a list of five steps is provided:

1. Receive and review RFx invitations, documents
2. Complete questionnaires and pricing responses online.
3. Validate and submit responses through the portal.
4. Communicate with Peraton through portal messages and updates.
5. Participate in negotiations when applicable.

Below the list, a blue text box states: **The Sourcing module replaces procurements use of email to acquire and negotiate competitive pricing and terms with out suppliers.**

Start

- Receive and respond to all RFx invitations sent via an auto generated email
- Upload documents, quotes, and complete pricing grids/templates
- Communication through the Ivalua chat option

Stop

- Receiving RFx invitations via email
- Sending documents and quotes in email
- Negotiating through email
- Any additional communication in email

Continue

- Receiving Purchase Orders through email
- Submitting invoices to the AP mailbox

Key Terminology



Sourcing Event

Basic Information for Project/Opportunity related to the RFX



RFX

Request sent to supplier for information ex. Documents/Rates/Pricing/Certifications



Proposal Progress

Current Status of the Proposal (i.e., Awaiting Acknowledgement, In Progress, Submitted)



Lots

Subsections of a sourcing event.



Rounds

Distinct phases within an RFX event



RFX Status

Stage of the current RFX (i.e., Open, Close)



Begin/End

Date RFX opened and date the RFX closes



RFX Documents

Sourcing Event/RFX specific documents uploaded to Ivalua

Key Terminology

[glossary](#)

Early Contract Document

Terms and Clauses



Info Menu

Name of Proposal



Questionnaire Menu

Forms that were previously attached to emails



Items Menu

Pricing Grid/Proposal completion



Pricing Grid

Pricing Sheet



Discussion Menu

Chat/Messaging to Peraton POC



History Menu

Shows work done on the specific RFX Proposal

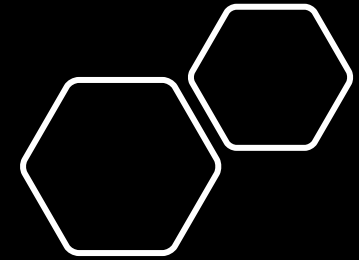


My Team Menu

Supplier contacts to be invited to the RFX

Visual End to End Process





Key Watchouts

Potential Risks & Considerations

- Keep an eye out for the End Date.
- Complete all questions in the Questionnaire Menu. You will get a blocking alert if not complete.
- Complete pricing grid and/or export excel spreadsheet to complete.
- Make sure to look at the different tabs in the pricing grid for quotes.
- If you choose to complete the exported excel spreadsheet and want to add additional items, be sure to complete the **first 3 fields** before completing the supplier portion.



Summary

Key points to remember

1

Suppliers must acknowledge receipt of RFx before participating

2

If you will bid, you must select WILL BID to submit formal proposal

3

Answer all questions

4

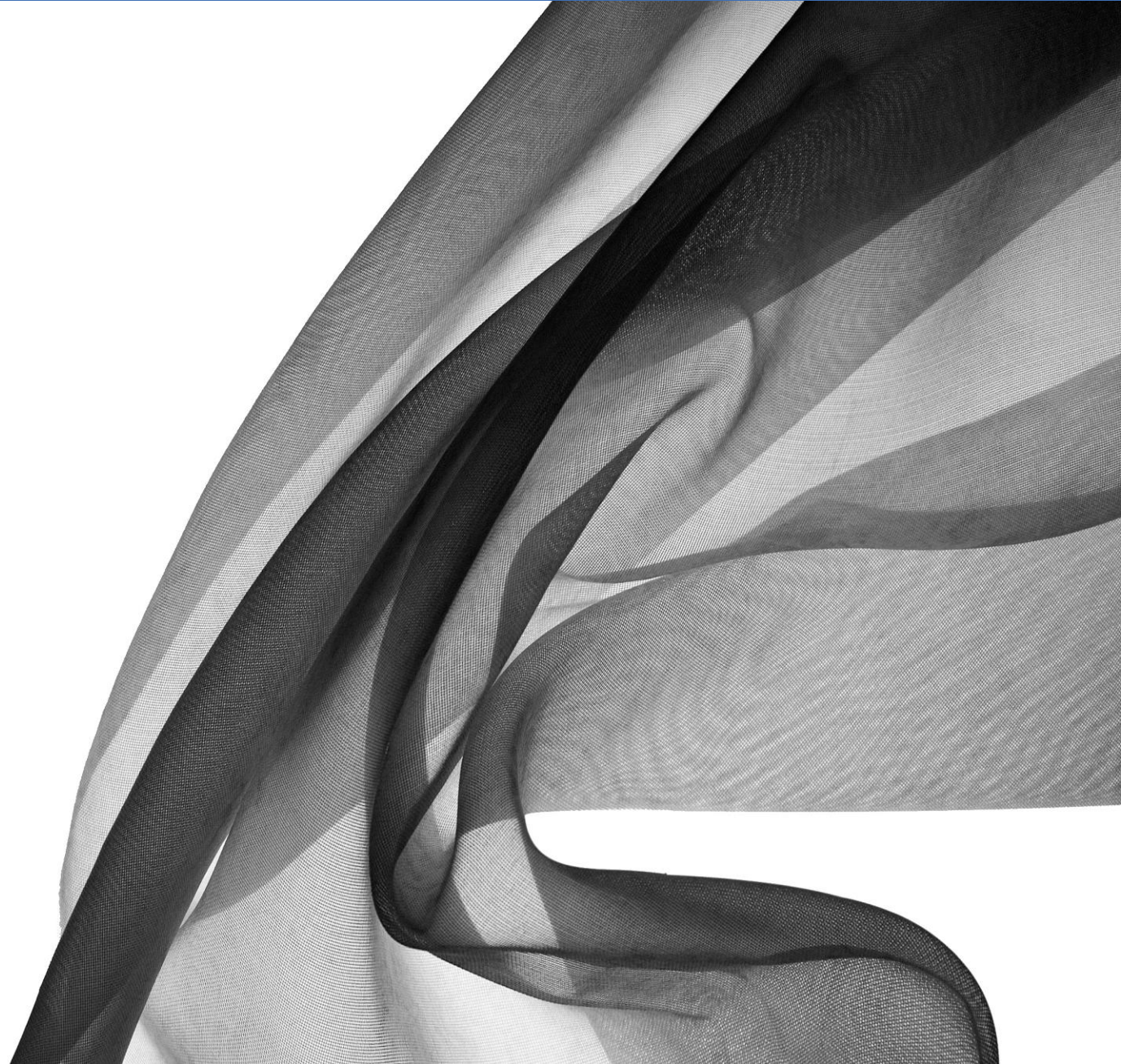
Choose to complete pricing grid or export/upload pricing

5

Validate and submit proposal

The Sourcing module enables suppliers to participate in sourcing events. Suppliers can provide proposal responses including pricing and answer questionnaires.

Closing



Supplier

1

Use the “how to” quick reference guide available by clicking the Help tab on the Ivalua Supplier Portal



2

If unable to access Ivalua, call Peraton ServiceDesk; ServiceDesk opens an Ivalua ServiceNow ticket



3

For onboarding, registration, or supplier information issues, open Ivalua chat with Sonja Chandler



4

For sourcing or NDA / TA issues, open Ivalua chat with the SCA / Buyer.

Hypercare:

Every Tuesday and Thursday effective May 4 thru July 31

Tuesday [Join the meeting now](#)

Meeting ID: 992 909 521 94

Passcode: 9Gp7H2hk

Thursday [Join the meeting now](#)

Meeting ID: 992 393 373 817

Passcode: TQ3nd9pk

- Ivalua will be rolled out to our Supplier in waves.
- We will start communicating the wave schedule later today

- Wave 1 – May 4
- Wave 2 – May 18
- Wave 3 – June 1
- Wave 4 – June 15
- Wave 5 – June 29
- Wave 6 – July 13

Support Resources

Resource Name	Reference / Where to Go
Ivalua Overview – Supplier Recording	https://player.vimeo.com/video/1174916563
Ivalua Supplier Reference Guide	https://www.peraton.com/wp-content/uploads/IvaluaSupplierReferenceGuide.pdf
Peraton IT HelpDesk	Dial 1.833.994.2449

Questions

