Peraton Ivalua Supplier User Reference Guide

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Peraton IVALUA Supplier Self-Service Guide

How to use this Guide

- This guide is structured as a “How do I…” specifics task and allows a supplier to go straight to step-by-step instructions and screen shots by clicking a link or using Word search or the navigation pane to jump directly to a question heading.
- Each task includes concise steps and screenshot references.

What this Guide Covers

- Supplier Portal log-in
- Supplier onboarding, documents, questionnaires, and information changes
- NDA and TA review, redlining, approval, and signature
- RFx acknowledgement, response preparation, pricing, discussions, and proposal submission

1.0 Find a Task Quickly

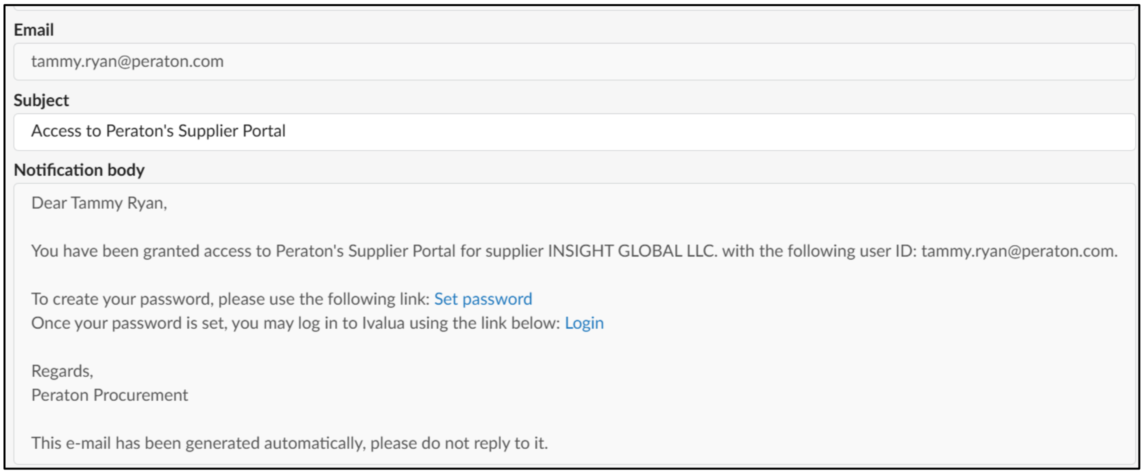
Click the hyper-link or use Word's search or navigation pane to jump to the question you need. Each task below appears as its own heading in this guide.

2.0 Get Started

2.1 How do I access Ivalua for the First Time?

Use this task when you receive your initial portal invitation from Peraton.

1. Open the Ivalua invitation email sent to your supplier contact.
2. Select the password setup link in the message.
3. Complete the password creation steps shown in the invitation workflow.
4. After your password is created, continue to the Ivalua login page.



Email
tammy.ryan@peraton.com
Subject
Access to Peraton's Supplier Portal
Notification body
Dear Tammy Ryan,

You have been granted access to Peraton's Supplier Portal for supplier INSIGHT GLOBAL LLC. with the following user ID: tammy.ryan@peraton.com.

To create your password, please use the following link: Set password
Once your password is set, you may log in to Ivalua using the link below: Login

Regards,
Peraton Procurement

This e-mail has been generated automatically, please do not reply to it.

Figure 1: Supplier Invitation Email

2.2 How do I Log in to Ivalua?

Use this task any time you need to sign in to the Supplier Portal.

1. Go to the Ivalua login page provided in your invitation or bookmark.
2. Enter your login email address.
3. Enter your password.
4. Select Login.

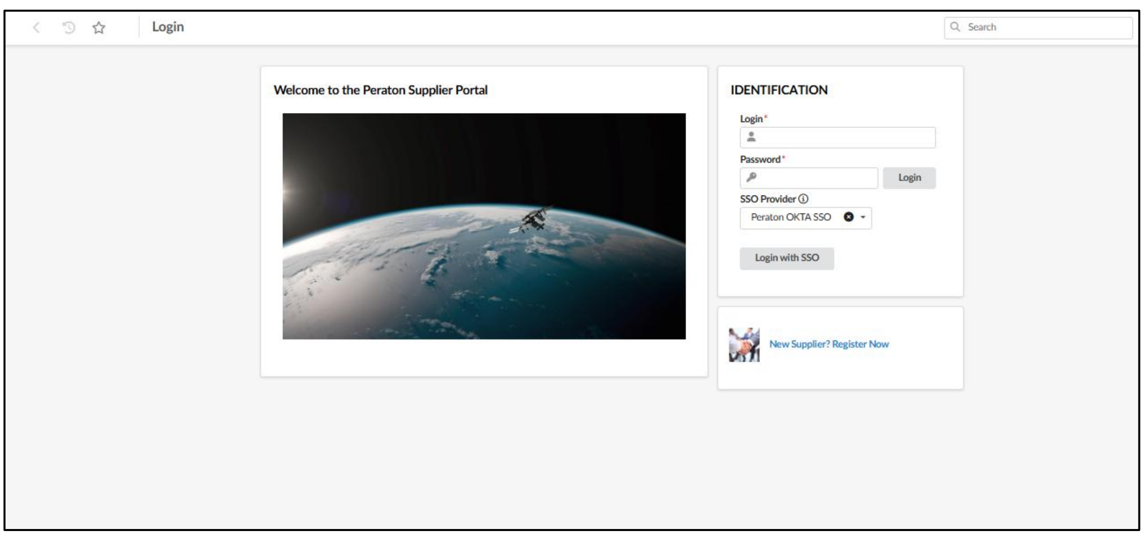


Figure 2: Supplier Portal login Page

2.3 How do I Accept and Acknowledge the Terms of Use?

Use this task the first time you sign in, or whenever the portal prompts you to re-acknowledge the terms.

1. Read the General Terms of Use presented by the portal.
2. Select the acceptance checkbox after you have reviewed the terms.
3. Select Acknowledge to continue into the Supplier portal.

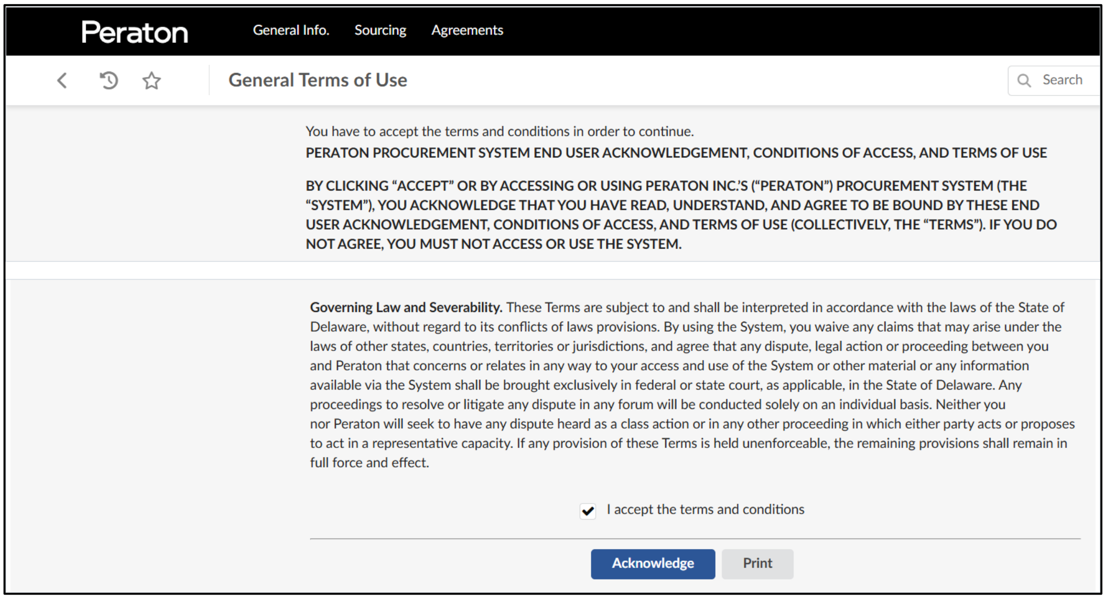


Figure 3: Terms of Use page with acceptance checkbox and acknowledge action.

2.4 How do I use the Supplier Portal Homepage?

Use the homepage to access General Info, Agreements, and Sourcing. The dashboard also shows onboarding progress, alerts, validations, and a Company Profile shortcut so you can open your supplier record quickly.

- Use the top navigation bar to move between General Info, Agreements, and Sourcing.
- Watch the dashboard and alert panels for items that require action.
- Use the homepage as your starting point for onboarding, questionnaires, and agreement actions.

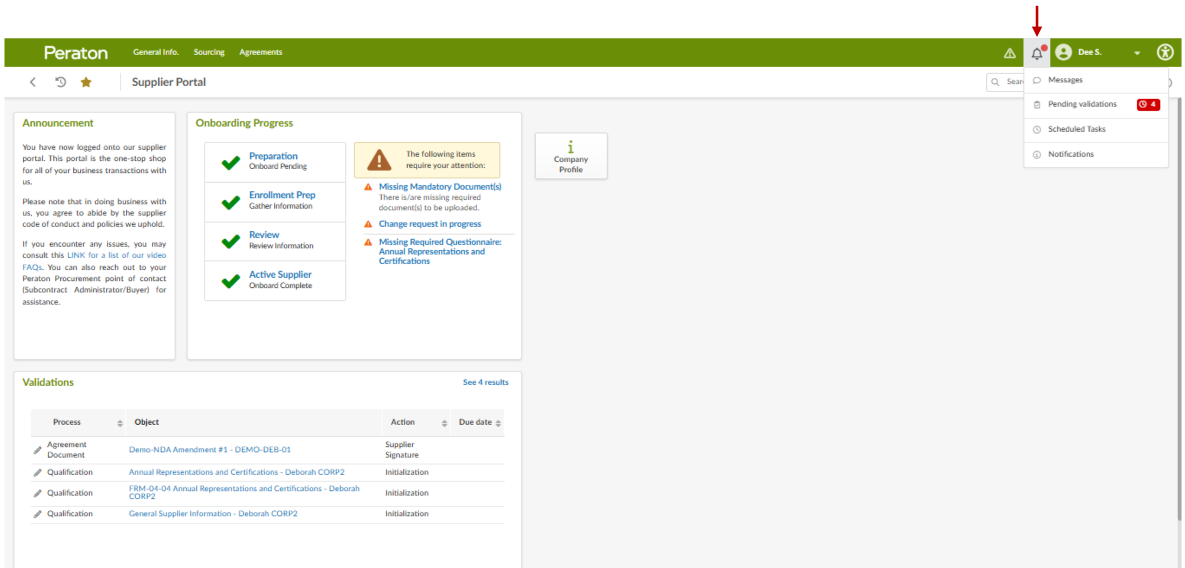


Figure 4: Supplier Portal Homepage

3.0 Manage Supplier Information

3.1 How do I Complete Required Company Information?

Use this task during onboarding or whenever Peraton asks you to update required company profile fields.

1. From the homepage, click General Info > Company Profile.
2. Review the required fields highlighted with a red asterisk.
3. Complete the required fields, such as phone number, legal structure, business size, or other required profile information.
4. Click Save before moving to the next tab.

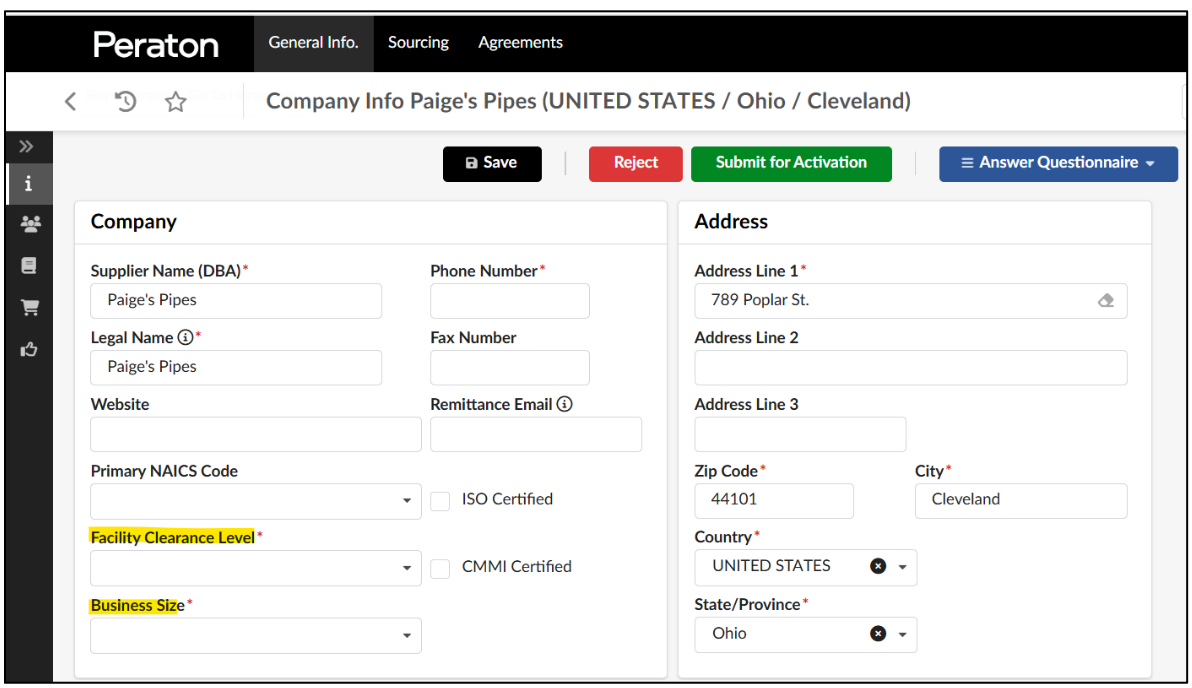


Figure 5: Company profile page used to complete required supplier information

3.2 How do I add New Contacts?

1. Click General Info > Company Profile > Contacts.
2. Click Create Contact.
3. Complete the required fields, click Save, click Close, then select the key icon and Send Message to send the new contact a password setup email.

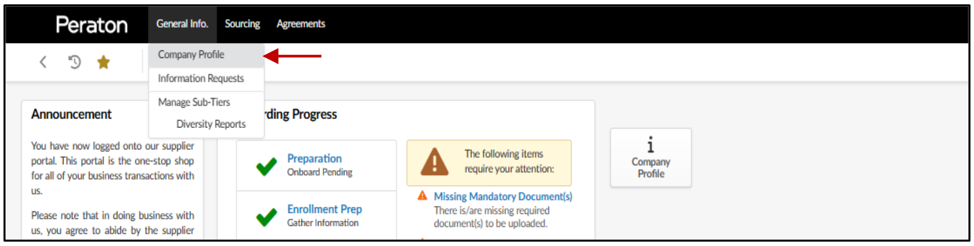


Figure 6: Access Company Profile

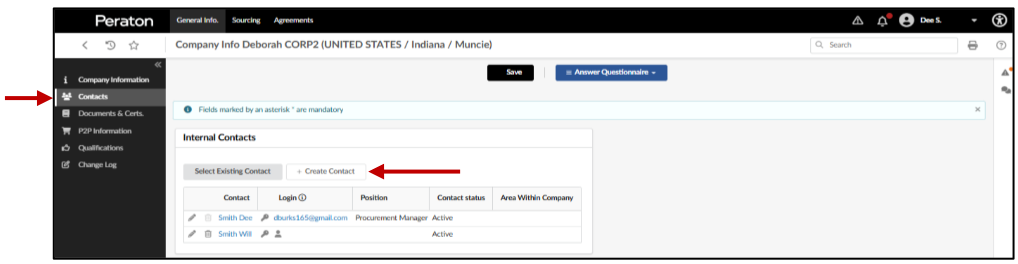


Figure 7: Contacts Tab

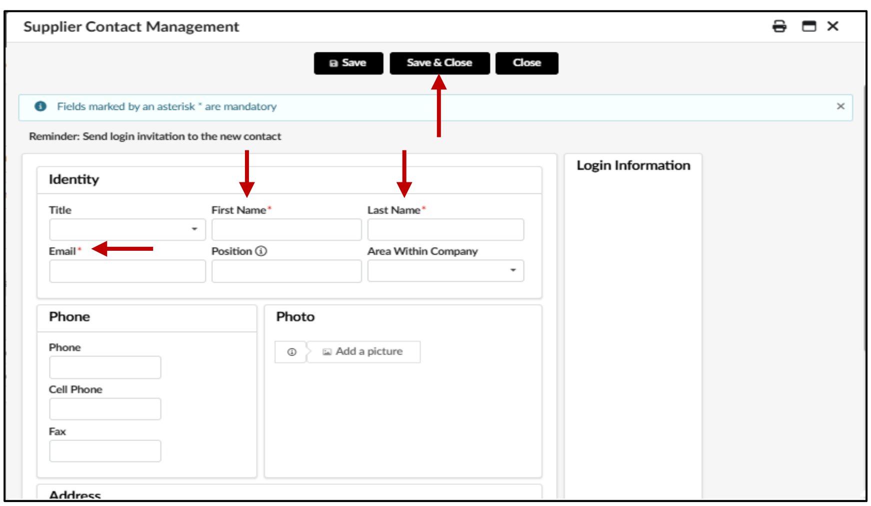


Figure 8: Supplier Contact Edit Form

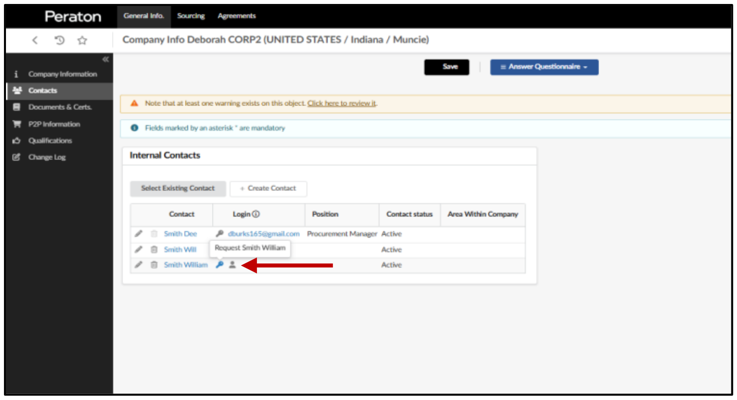


Figure 9: Key to create login

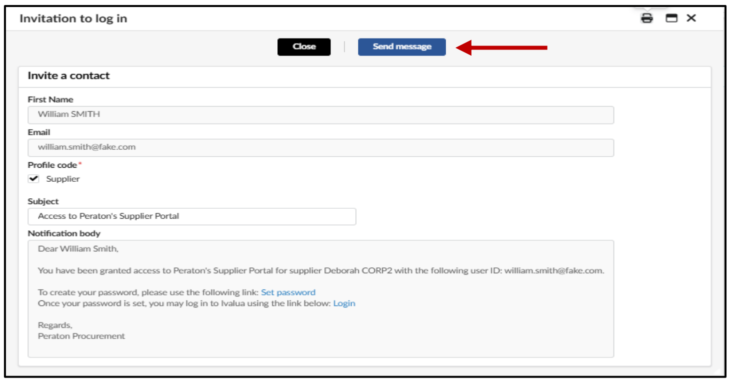


Figure 10: Contact Login Message

3.3 How do I upload a W-9 or W-8?

Use this task when a tax form or other document is required in Documents & Certs.

1. Click the Documents & Certs tab.
2. Scroll down and click Add Other.
3. Choose the document type, upload the file, and enter the begin date using the submission date unless Peraton instructs otherwise.
4. Click Save.

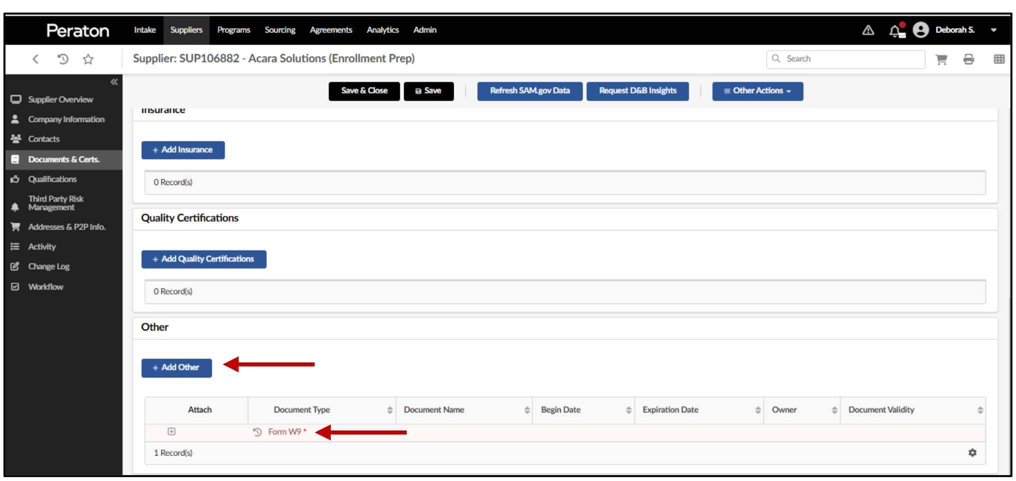


Figure 11: Prepare to Upload W-9 or W-8

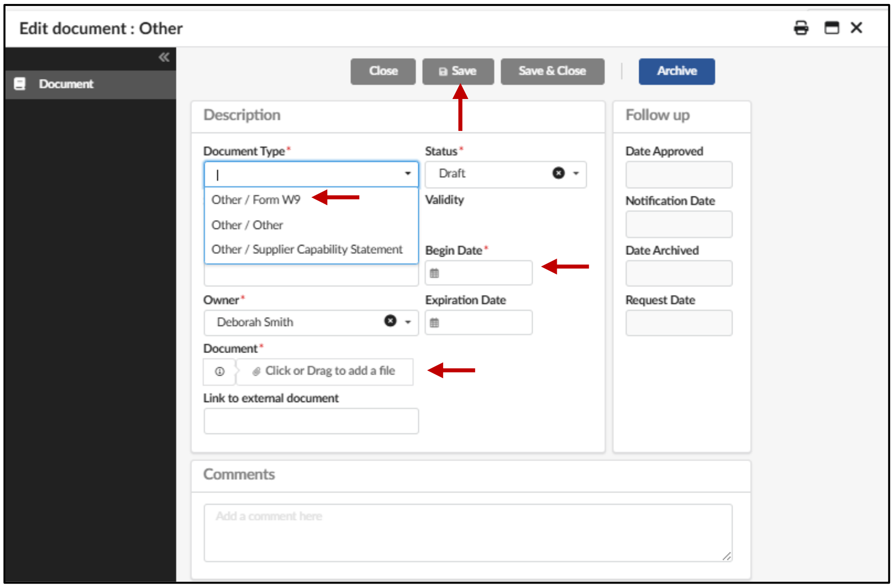


Figure 12: Upload W-9/W-8

Important

Repeat the same general process to add certificates of insurance, quality certifications, small business certifications, and approved system letters by using the matching Add button for each document type.

3.4 How do I add an Order Address?

Use this task in P2P Information when you need to add the address Peraton should use for ordering.

1. Click the P2P Information tab.
2. Click +Order Address.
3. Complete the required address fields.
4. Mark the correct address as the default when applicable.
5. Click Save.

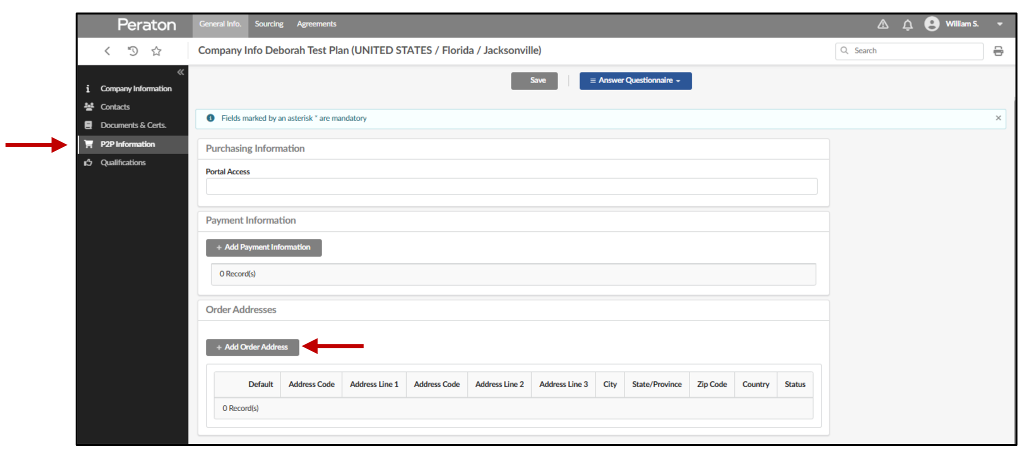


Figure 13: Prepare to Add Order Address

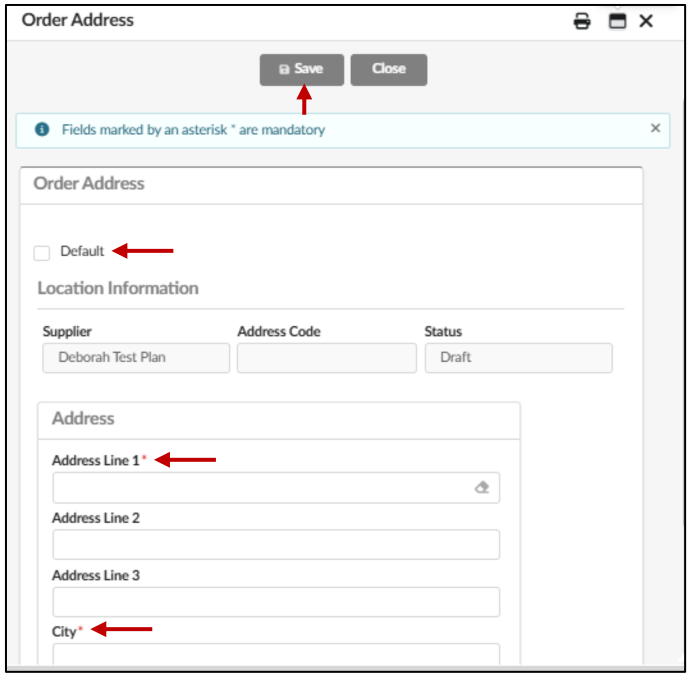


Figure 14: Order Address Entry Form; ensure to set the address as your default

3.5 How do I add Payment Information?

Use this task during onboarding or when you need to add a new remittance and banking record.

1. Click the P2P Information tab, then click +Add Payment Information.
2. Complete the remittance address.
3. Select the payment type and enter bank details such as bank name, account name, account number, and routing number.
4. Click Save.

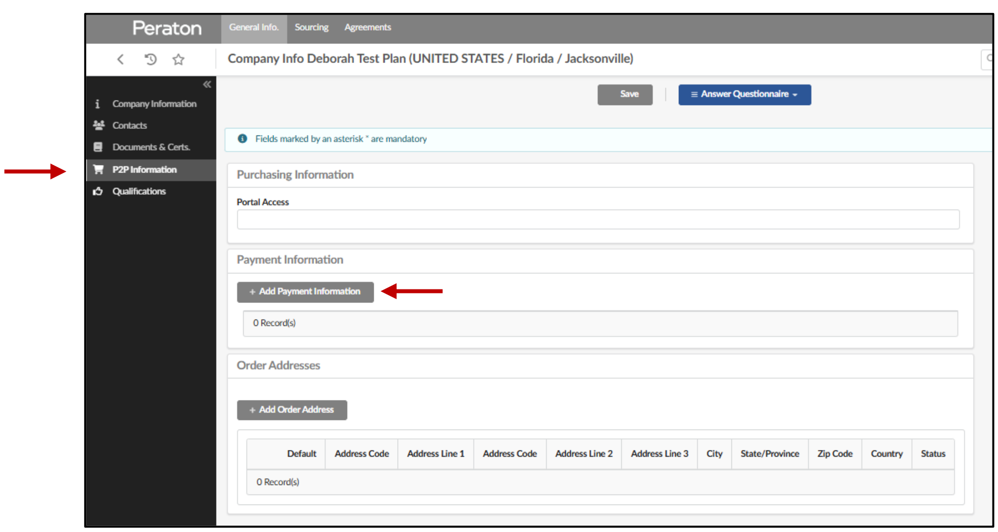


Figure 15: Prepare to Add Payment Information

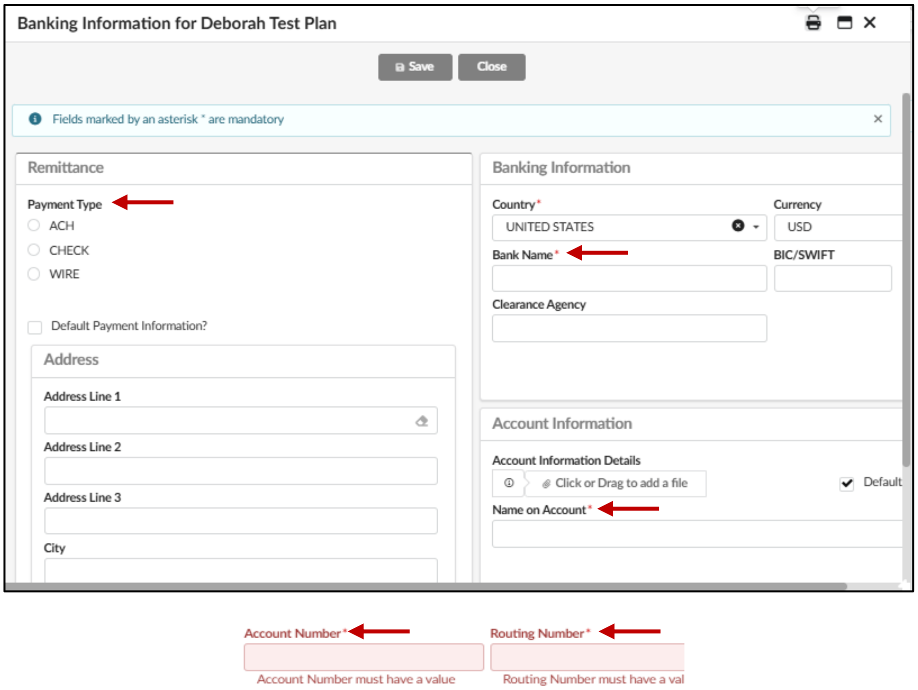


Figure 16: Payment Information form for remittance and banking details

3.6 How do I Answer Questionnaires?

Use this task when questionnaire alerts appear on the Supplier Portal homepage.

1. Review the missing questionnaires listed under “The following items require your attention.” (see Figure 17)
2. Click the questionnaire link. (see Figure 17)
3. Click Answer Questionnaire. (see Figure 18)
4. Click the Access questionnaire button. (see Figure 19)
5. The Certification tab allows you to answer all of the questions.
6. The signature tab allows you to answer the final sign-off questions.
7. Complete all required questions. The tabs show your answered-to-required ratio.
8. Click Submit when all required responses are complete. (see Figure 20)

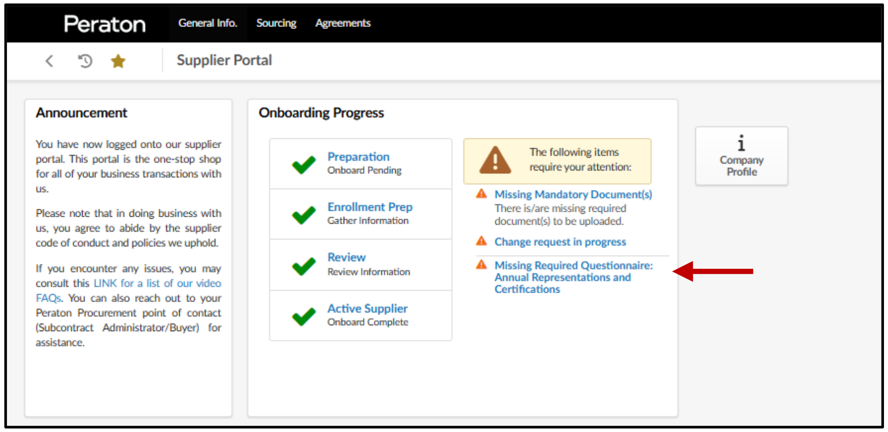


Figure 17: Be aware of outstanding questionnaires via items requiring attention located on the Supplier Portal homepage dashboard

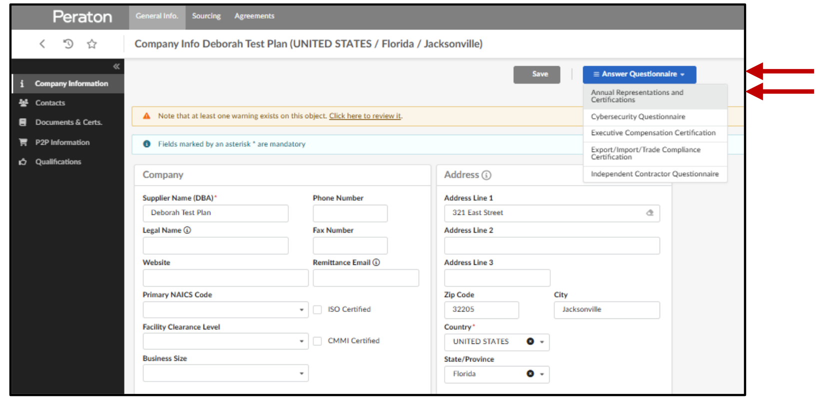


Figure 18: Access the questionnaires using the Answer questionnaire from the Company Information page

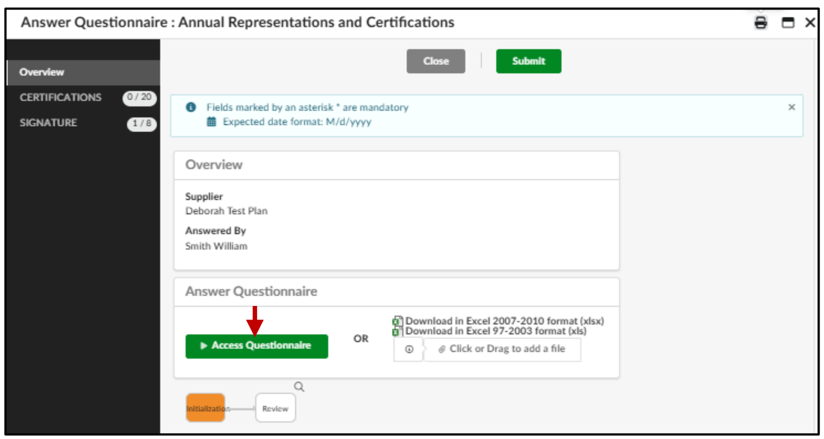


Figure 19: Prepare to respond to questionnaire overview page from the overview page.

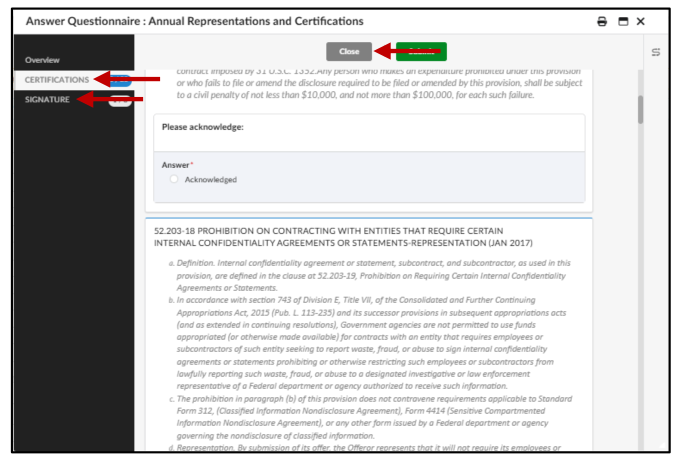


Figure 20: Questionnaire page allows both certifications and signature questions to be answered

3.7 How do I Submit for Activation?

Use this task after your company information, documents, addresses, payment information, and required questionnaires are complete.

1. Confirm all required items are complete and saved.
2. Click the “Submit for Activation” button from the Company Profile page.
3. Wait for Peraton to review and activate the supplier record.

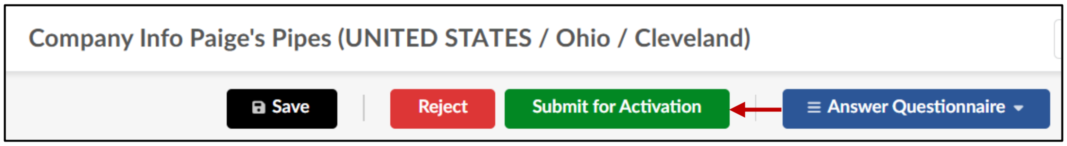


Figure 21: Submit for Activation on the company profile

3.8 How do I Request a Company Information Change?

Use this task after you are fully onboarded (Supplier Active) when a company information update is needed, such as a name change, business size change, or other profile correction.

1. From the Supplier Portal homepage, click Company Profile, then click Request Information Change. (see Figure 22)
2. Enter the reason for the change request. (see Figure 23)
3. Update every field that needs to change.
4. Attach any supporting documentation required for the change.
5. Click Submit for Approval. (see Figure 23)

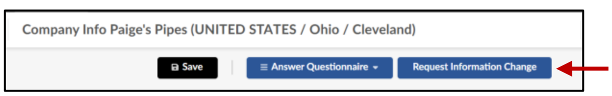


Figure 22: Request Information Change button on the company profile

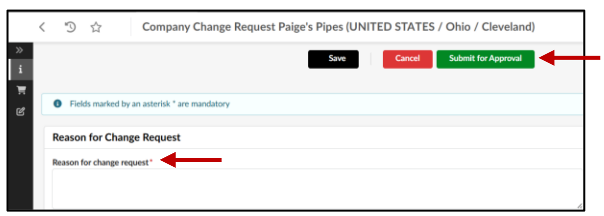


Figure 23: Company profile change request form

Important

- Tax ID changes are not handled through a company information change request. If the tax identifier changes, a new supplier record may be required.
- Only one supplier information change request can be in progress at a time.

3.9 How do I Update Banking Information After Activation?

Use this task when you need to edit banking information already on file or add a new bank record after the supplier record is active.

1. Click the P2P Information tab and go to Payment Information. (see Figure 24)
2. To change an existing record, select the pencil icon next to the banking entry you want to update.

3. Click Edit. (see Figure 25)
4. Update the applicable fields, then click Submit for Approval. (see Figure 26)
5. To add a new bank account without replacing the current one, add a new payment record instead of using a company information change request.

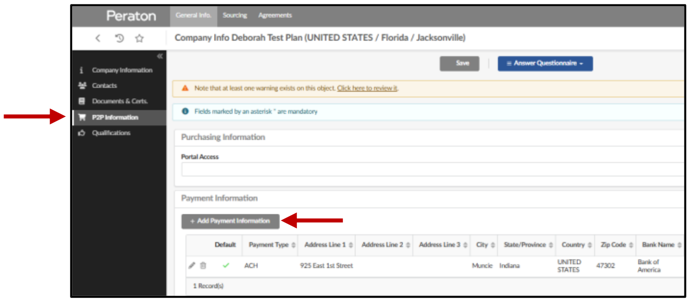


Figure 24: Payment information list with edit option for an existing record

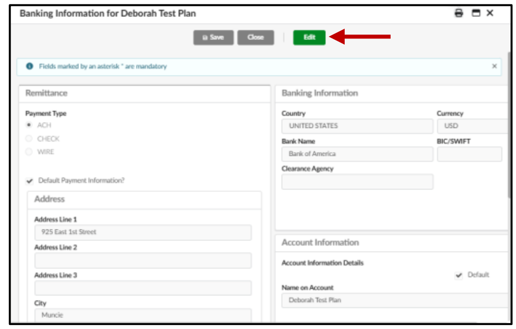


Figure 25: Banking information edit button

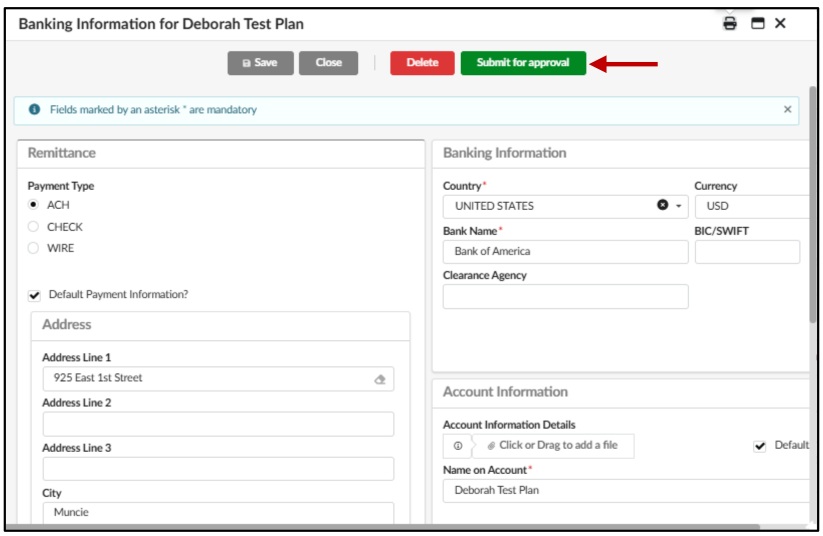


Figure 26: Banking Edit Form

Common Watchouts for Supplier Information

- Save your work on each page before navigating away.
- Watch for alerts and blocking messages on the homepage and on the right-side panel.
- Missing documents or incomplete required fields can stop onboarding or change requests from moving forward.
- Keep documents current before they expire.

4.0 Review, Redline, and Sign Agreements

4.1 How do I Find an Agreement that Needs Action?

Use this task when Peraton issues a new NDA or TA or returns an agreement for review or signature.

1. Log into Ivalua to access the Supplier Portal homepage.
2. Review the Validations list for agreement actions that need attention.
3. Select the blue agreement link associated with the agreement that needs review or signature to open the record.

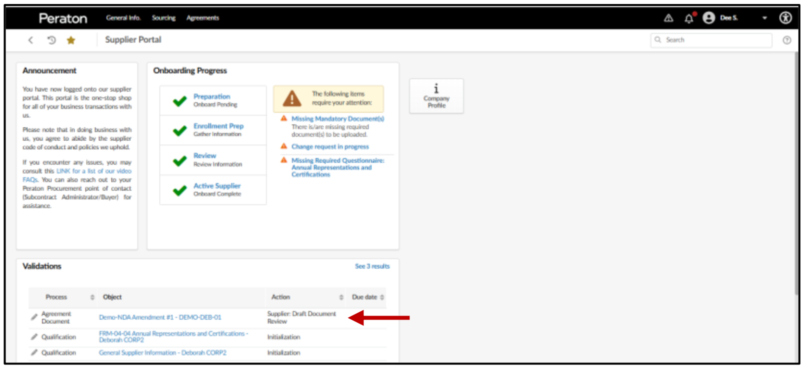


Figure 27: Validations showing an agreement that needs supplier action

4.2 How do I Review and Approve an Agreement?

Use this task when the agreement terms are acceptable without redlines.

1. Open the agreement from the Validations list.
2. The agreement page opens, with the document displayed in the center panel.
3. Click the Word or PDF icon if you need an offline copy for review.
4. Select Approve to return the agreement to Peraton for signature processing.

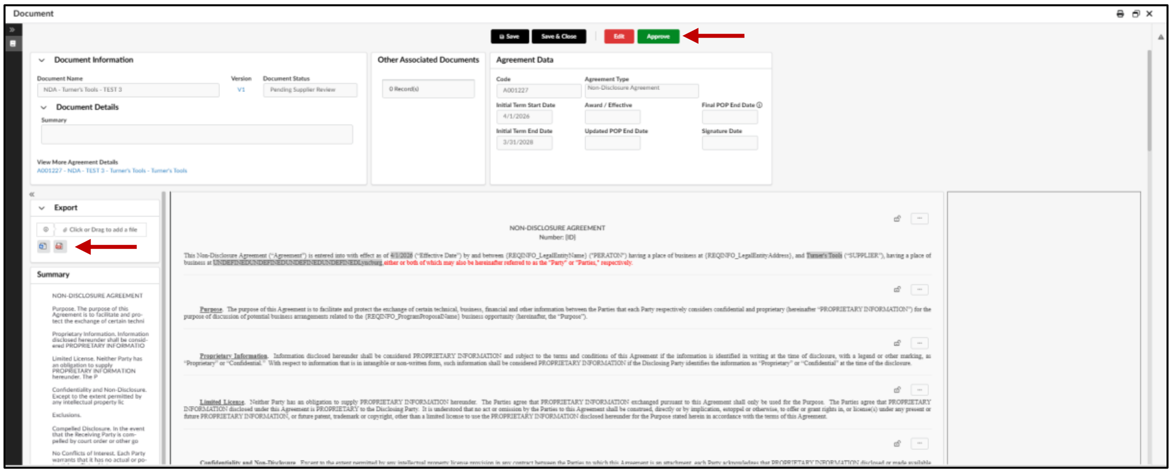


Figure 28: Agreement review page with Approve button

4.3 How do I Redline an Agreement?

Use this task when the agreement needs revisions before you can approve it.

1. Open the agreement from the Validations list on the Supplier Portal homepage.
2. Click Edit to enable redlining. (see Figure 29)
3. Revise the agreement text as needed. Your edits will be highlighted in the document. (see Figure 30)

4. To add a comment, highlight the redlined text, click the comment icon in the edit bar, enter your comment, and click the green check mark. (see Figure 31)
5. Click Save. The Send for Peraton Review button will appear. (see Figure 32)
6. Click Send for Peraton Review to return the redlined agreement to Peraton. (see Figure 32)

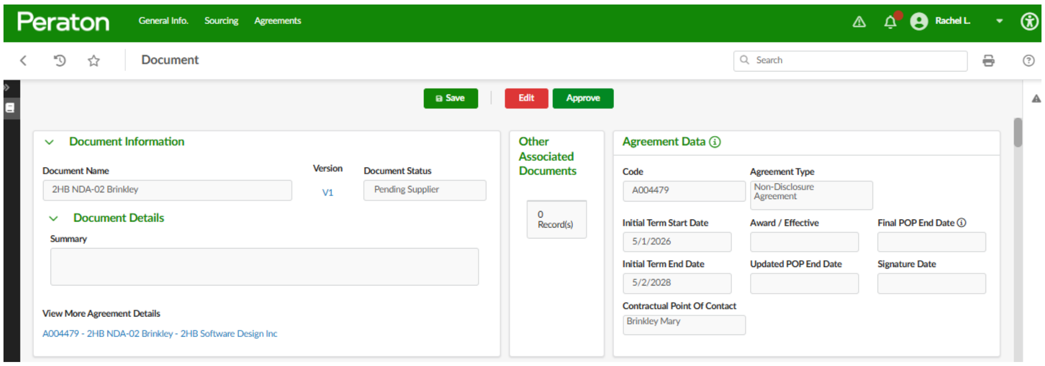


Figure 29: Use Edit button to redline

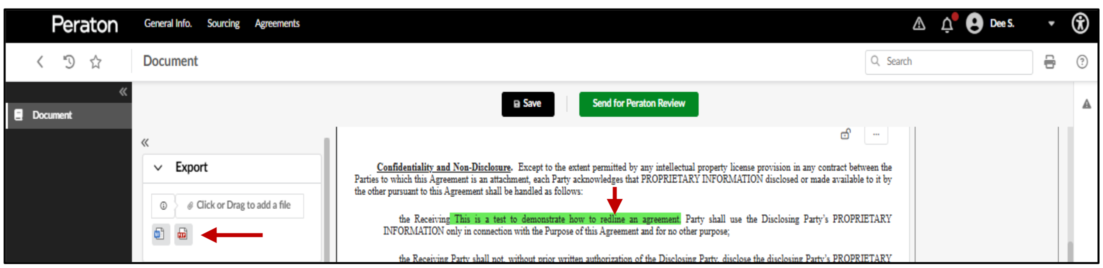


Figure 30: Agreement Redline

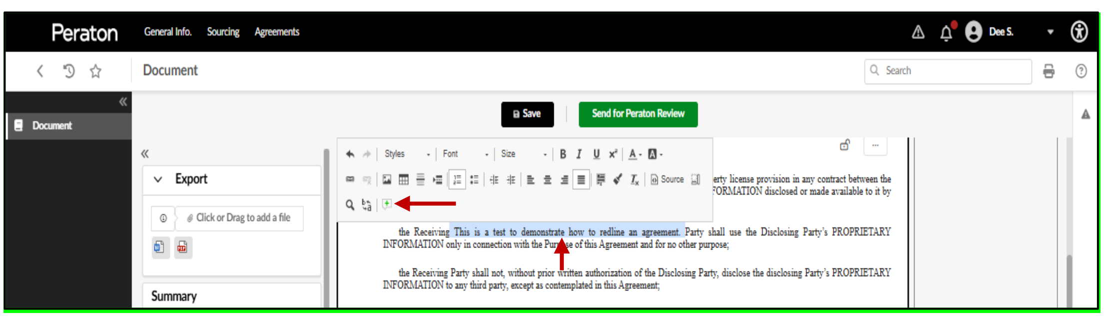


Figure 31: Highlighted redline preparing to enter a comment

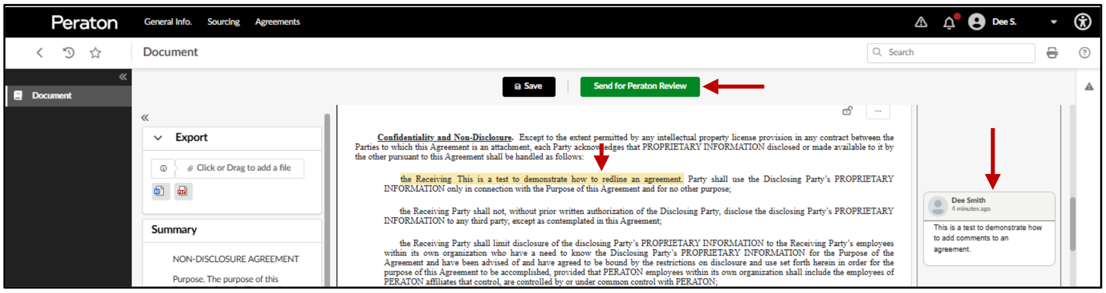


Figure 32: Agreement after supplier edits and comments are made ready to send for Peraton review

4.4 How do I Sign the Final Agreement?

Use this task when the agreement is returned to you for final signature. (see Figure 33)

1. Monitor the Validations list for the agreement to return with the supplier signature step.
2. Click the agreement link in the Validations list.
3. If the agreement is still not acceptable, click the Reject button so the review cycle can continue.
4. If the agreement is acceptable, click the Sign button.

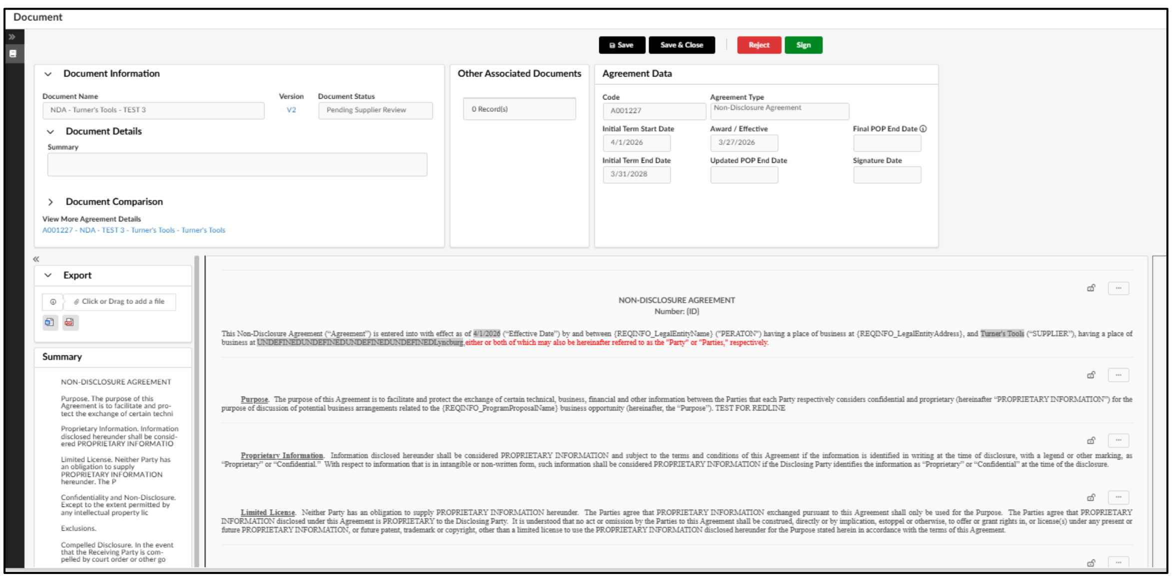


Figure 33: Final agreement action to Sign or Reject

4.5 How do I Find Completed Agreements?

Use this task when you need to confirm status or download a copy of a completed NDA or TA. (see Figure 34, 35, and 36)

1. Click Agreements > Manage Agreements on the Supplier Portal homepage.
2. Review Workflow Status to confirm whether the agreement is in draft, in signature, or signed. To view only completed agreements, filter Workflow Status to Signed and click Search.
3. To open an agreement, click the edit pencil next to the record.
4. Click the Documents tab, then click Word or PDF to download a copy.

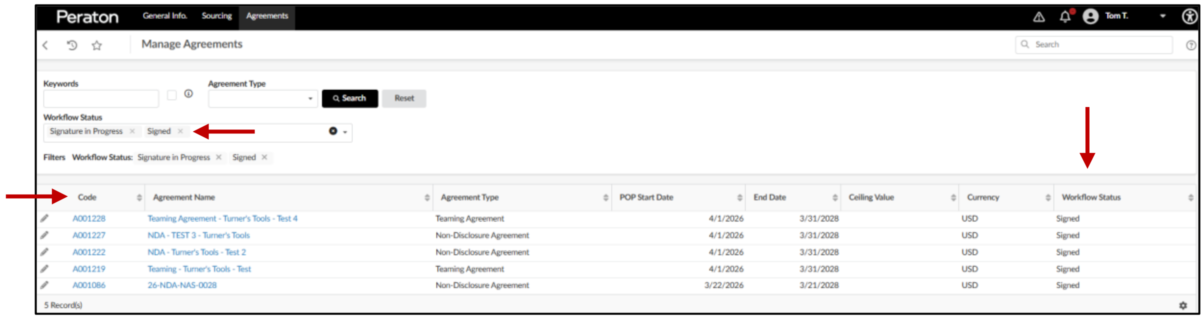


Figure 34: Agreement repository with workflow status and document list

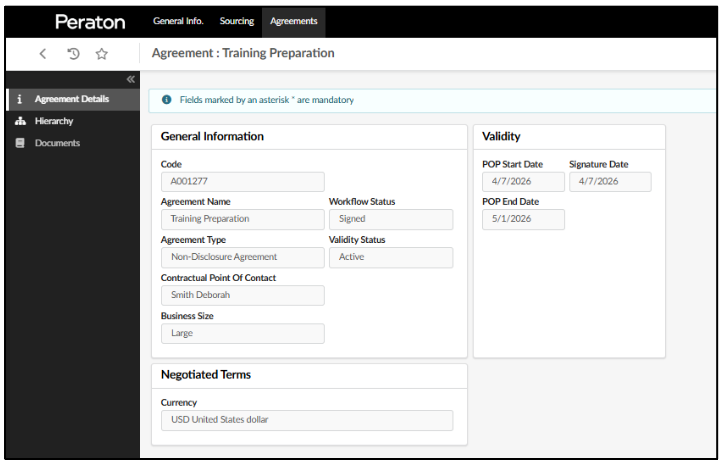


Figure 35: Agreement details display after clicking edit pencil

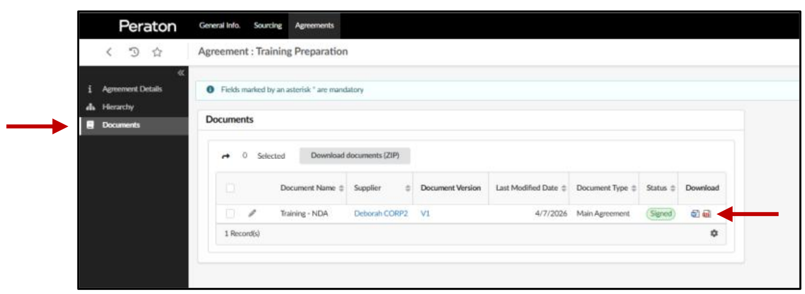


Figure 36: Documents tab allows download of agreements

Agreement watchouts

- Check the homepage validations and notifications regularly so agreement actions do not sit unanswered.
- When you redline, make comments specific enough that Peraton can evaluate the requested revision quickly.

5.0 Respond to Sourcing and RFx Events

5.1 How do I open an RFx Invitation?

Use this task when you receive a sourcing invitation from Ivalua. (see Figure 37, 38, and 39)

1. Open the RFx invitation email sent from Ivalua.
2. Click "Click here" in the email to go directly to the RFx. If prompted, log in first. After login, the RFx page will display.
3. If you are already logged in, click Sourcing > Manage Proposals to locate the RFx.

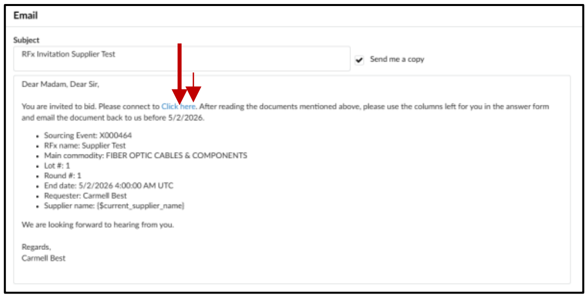


Figure 37: Peraton RFx Invitation Email

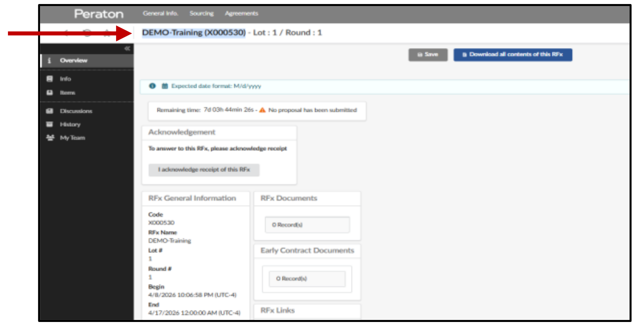


Figure 38: RFx page that displays after completing the login triggered from the RFx invitation email

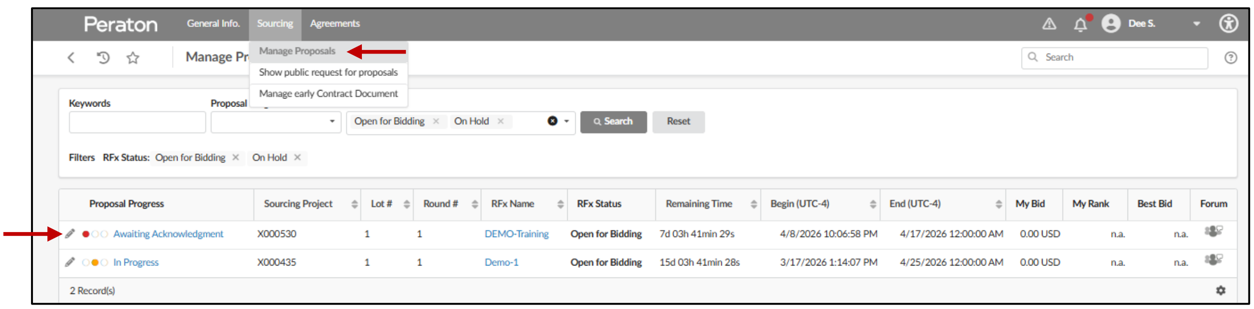


Figure 39: Manage Proposal page which displays the supplier list of proposals

5.2 How do I Acknowledge Receipt and Will Bid or No Bid?

Use this task as soon as you open the event so Peraton knows whether you intend to participate. (see Figure 40, 41, 42, and 43)

1. If accessing the RFx from the "Manage Proposal" page (Figure 40), click the edit pencil next to the proposal.
2. Click the Acknowledge receipt button located on the RFx "Overview" page.
3. Before making the decision to bid or no bid, review the event name, lot, round, begin date, and end date.
4. Review the RFx documents and early contract documents attached to the event. ***Note:*** *Clicking the "Download all contents of this RFx" button downloads all RFx documentation into a zip file for review.*
5. After reviewing the RFx and associated documents, scroll up the RFx Overview page and check the will bid or no bid box. ***Note:*** *If you select no bid, Ivalua will prompt you to provide a reason prior to submitting your response.*
6. Click the "Submit" button.

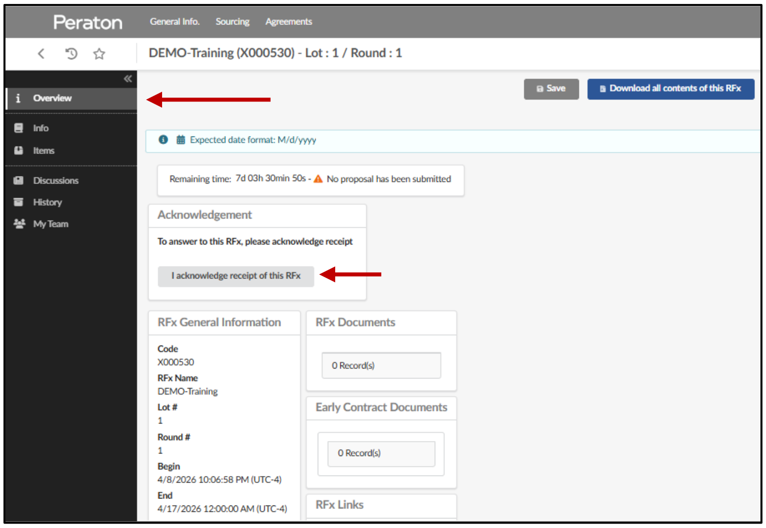


Figure 40: RFx Overview page allows supplier to acknowledge receipt of the RFx

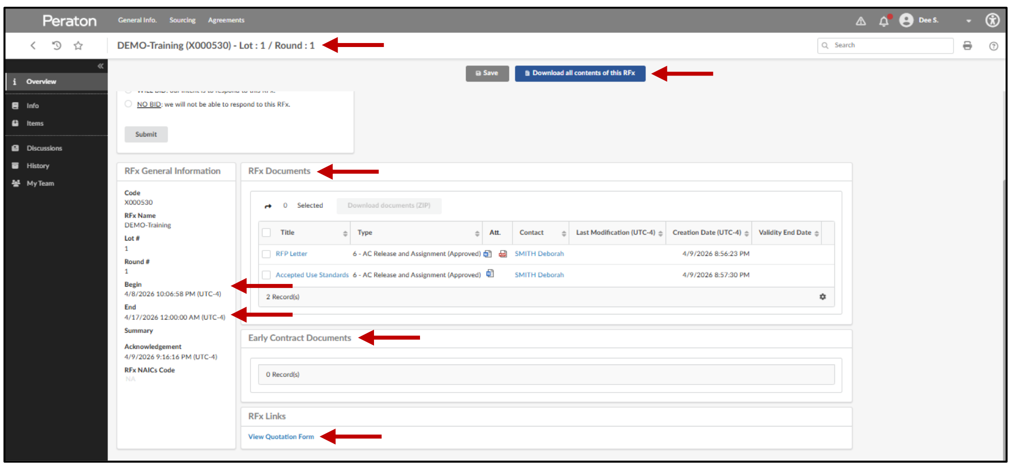


Figure 41: RFx Overview page contains access to RFx documents and early contract documents

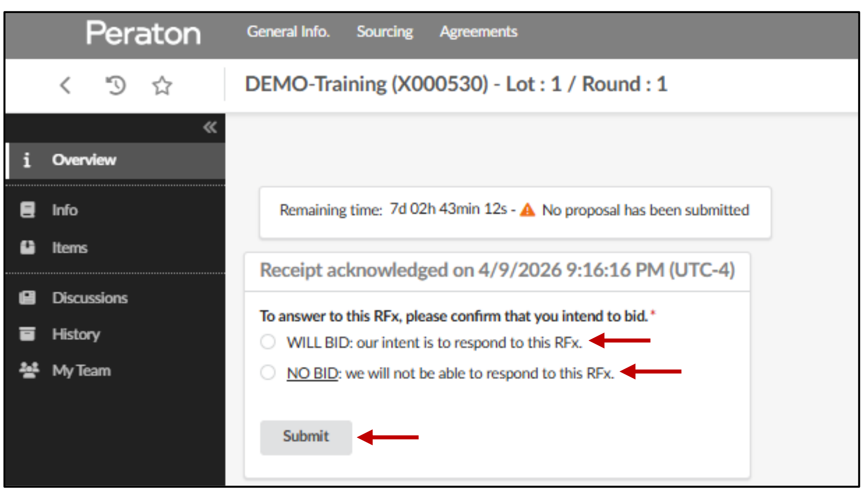


Figure 42: Will bid or No Bid

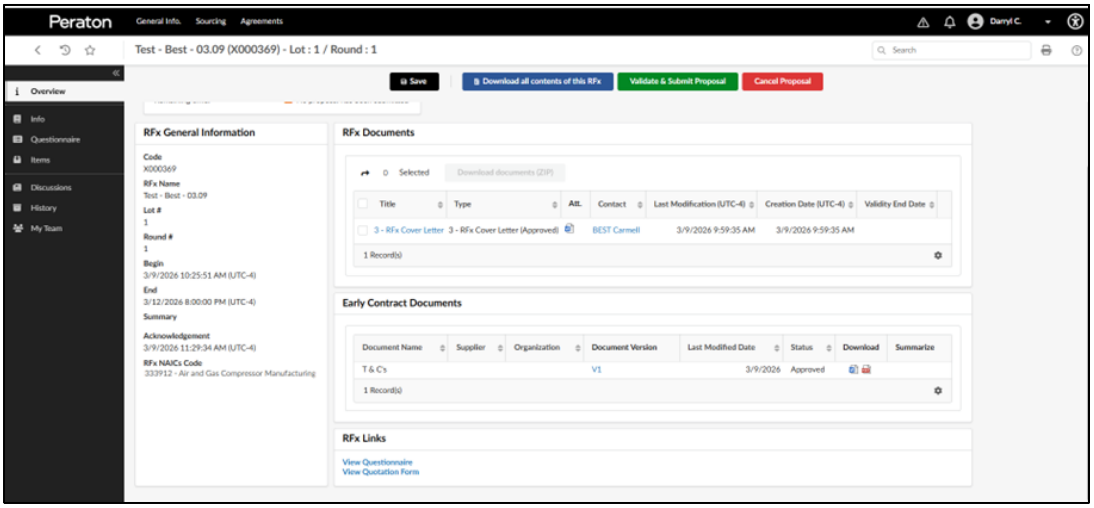


Figure 43: After will bid decision supplier can prepare proposal response

5.3 How do I Complete Proposal Information?

Use this task when the event requires baseline proposal information before you answer questionnaires or pricing. (see Figure 44)

1. Click the Info tab.
2. Enter a name for the proposal in the “Label” field.
3. Complete all required baseline details (noted with red asterisks) shown on the page.
4. Click save before moving on to the next RFx tab.

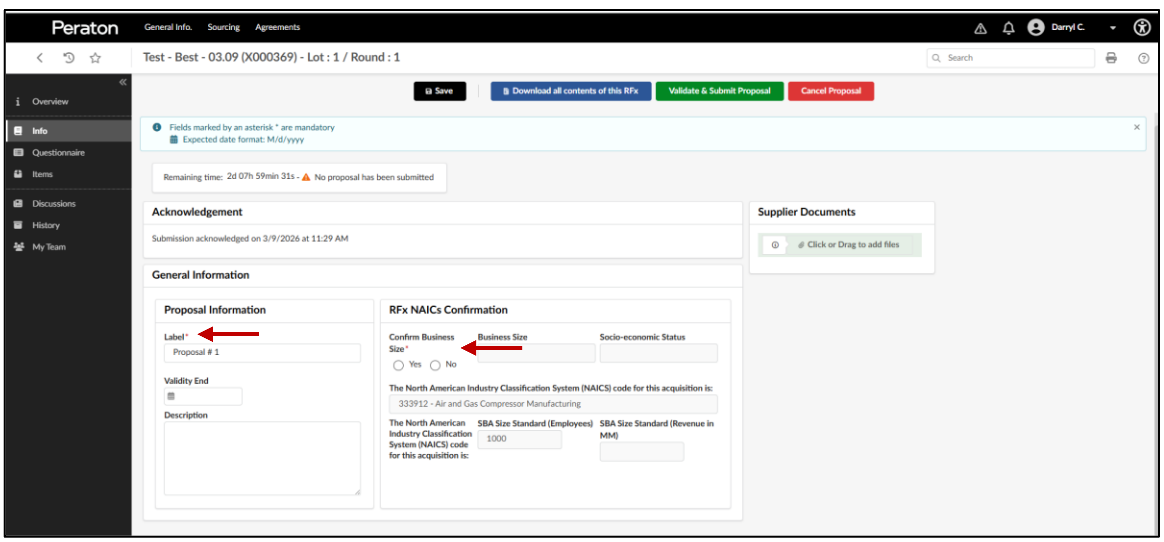


Figure 44: Proposal information page

5.4 How do I Answer RFx Questionnaires?

Use this task when the event includes questionnaire responses as part of the proposal. (see Figure 45)

1. Click the Questionnaires tab.
2. Answer every required question before moving on.
   Note: *Each questionnaire provides a ratio of questions answered vs what’s required.*

3. Save your responses if the page offers a save action.

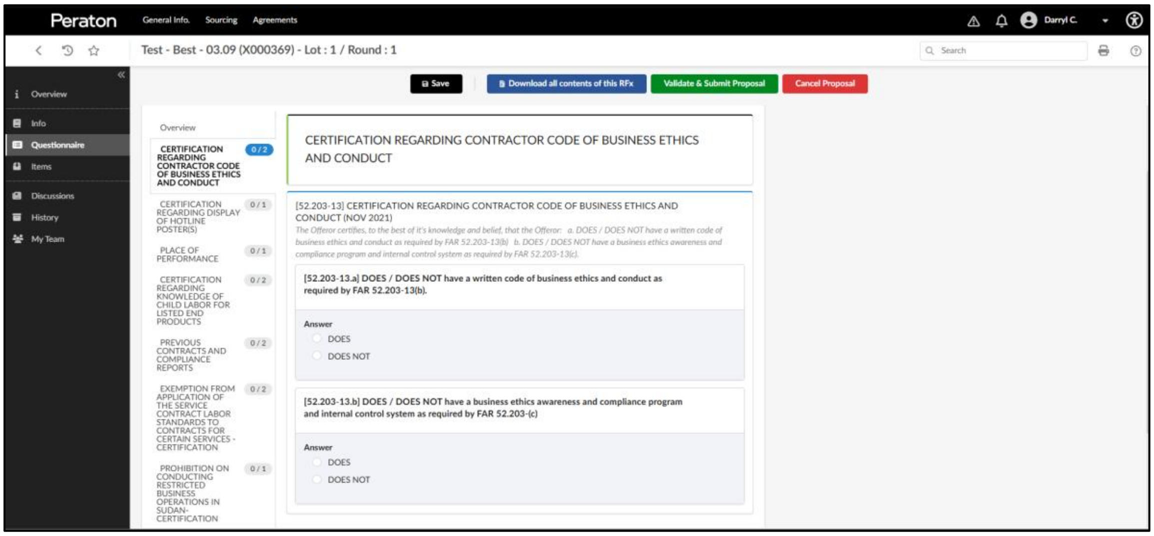


Figure 45: RFx questionnaire page

5.5 How do I Enter Pricing?

Use this task when the event requires online pricing entry or a quotation form update. (see Figure 46, 47, and 48)

1. Click the Items tab.
2. Enter the required values, such as delivery, list price, unit price, or other requested line-item details, directly in the grid, or click the edit pencil next to a line item and enter pricing in the line-item entry form.

Note: *When multiple line items need to be priced, suppliers can use the export feature to download the pricing sheet to Excel and provide proposed pricing offline. When complete, use the click or drag-and-drop upload option to return the proposed pricing file.*

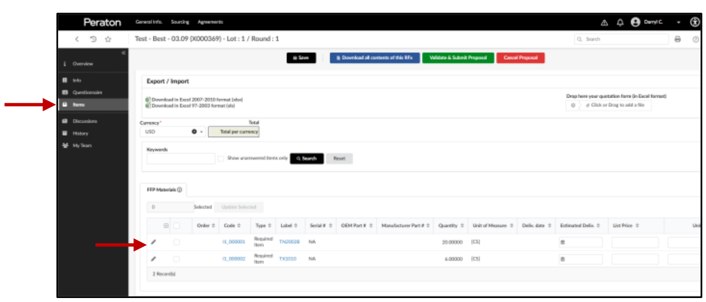


Figure 46: Items or quotation form list

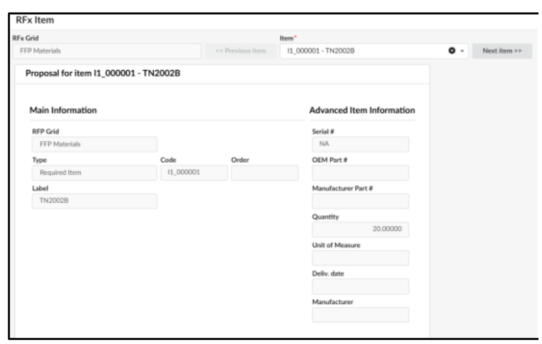


Figure 47: Supplier line-item pricing entry

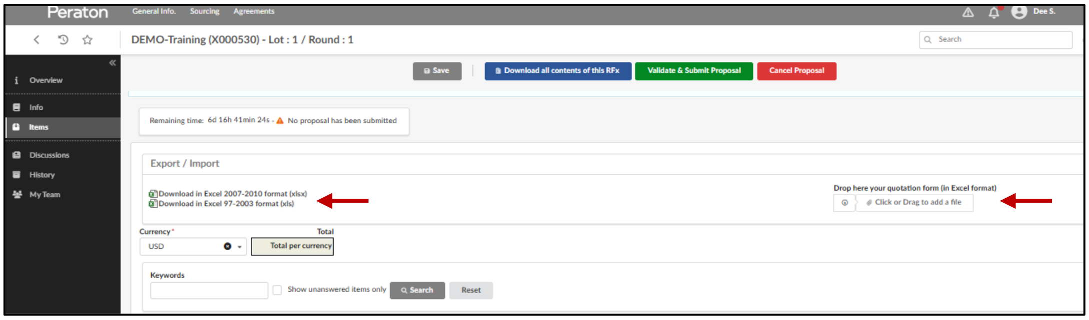


Figure 48: Price sheet export option

5.6 How do I upload a quote to provide pricing or other applicable documentation?

Use this task when you need to attach quotes for pricing and/or other applicable RFx documents.(see Figure 49)

1. Click the “Info” tab.
2. Under Supplier Documents, drag to add files or click to upload any applicable documents for the request.

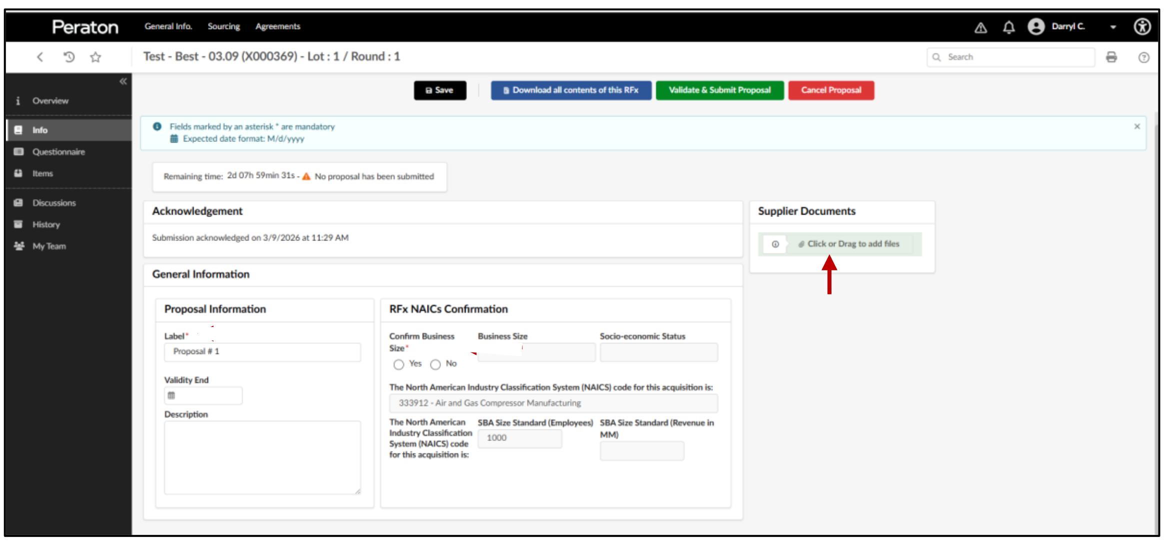


Figure 49: Sourcing Info tab allows supplier to upload applicable documents

5.7 How do I Send Questions or Attachments through Discussions?

Use this task when you need to communicate with the Peraton point of contact during the RFx. (see Figure 50)

1. Click the Discussions tab.
2. Click the Compose button.
3. Select the message type to indicate the purpose of the message.
4. Enter a subject line and choose the recipient from the dropdown.
5. Enter your message and attach a file if needed.
6. Click the “Send” button.

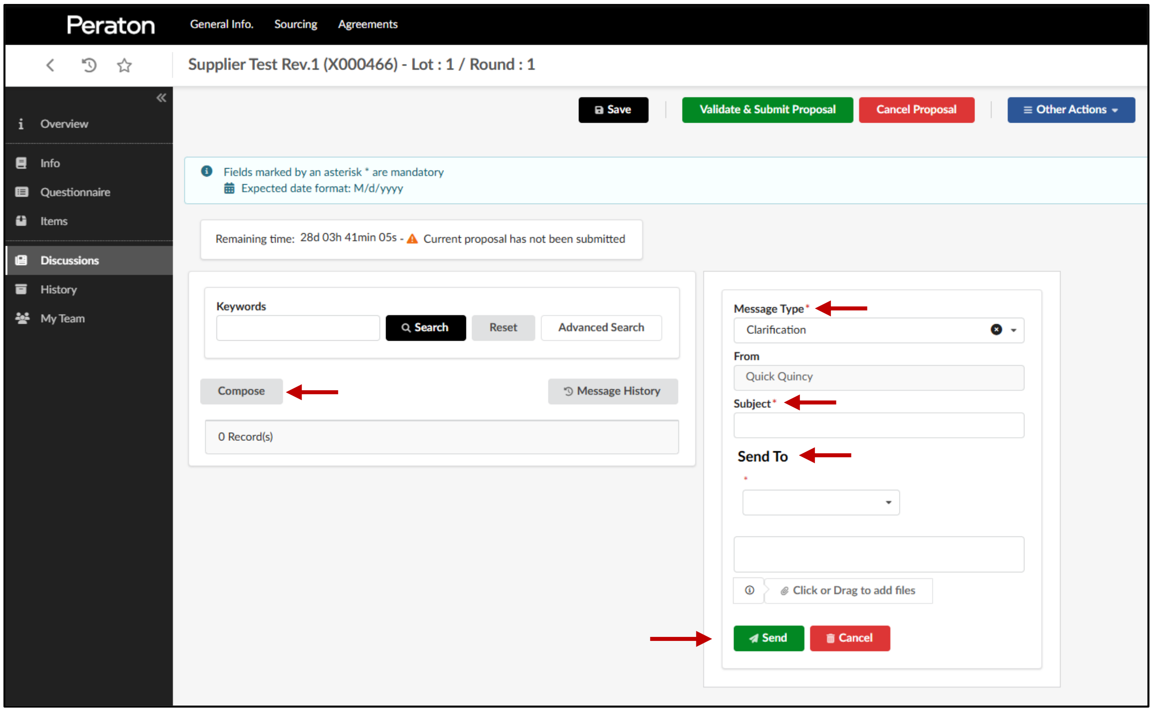


Figure 50: Discussions page for RFx communications

5.8 How do I Validate and Submit my Proposal?

Use this task after questionnaires, pricing, documents, and discussion items are complete. (see Figure 51 and 52)

1. Review the full RFx response for completeness (i.e., items priced, all questionnaires answered where required, documents attached (if any)).
2. Click Validate and Submit Proposal. If you click Cancel Proposal instead, Ivalua returns you to the RFx page so you can acknowledge No Bid and provide a reason.
3. Ivalua will prompt you to validate your submission (see Figure 51). Resolve any blocking messages or missing required fields reported by the portal.
4. Click Submit the proposal. Proposals must be submitted before the event end date and time. If you click Reject instead, Ivalua lets you make updates and then restart Validate and Submit Proposal.

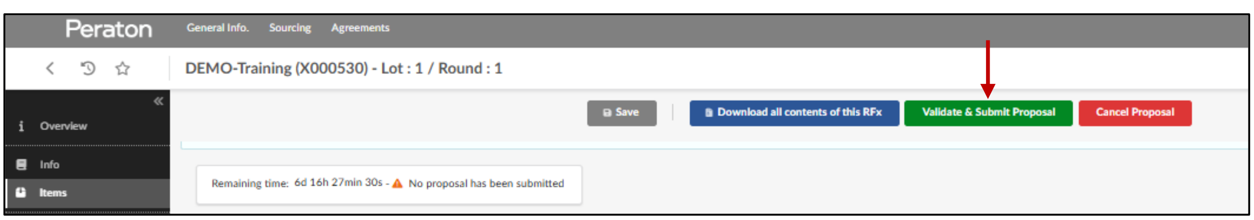


Figure 51: Trigger validation and submission of proposal

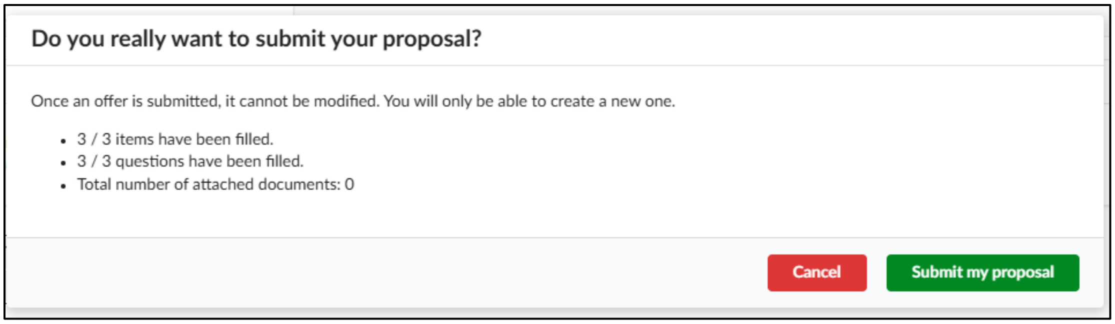


Figure 52: Validate before submitting proposal

RFx Watchouts

- Watch the end date and time closely.
- Complete all required questionnaire responses before you submit.
- If the event uses line-item pricing, check all relevant tabs or sections of the quotation form.
- Resolve validation messages before the RFx closes.

6.0 Get Help

6.1 How do I get Help?

- For Ivalua access problems, call Peraton IT helpdesk – 1.833.944.2449. Our Ivalua administration team will follow up with you to resolve the problem.
- For supplier information and onboarding questions, contact Sonja Chandler using the Ivalua chat feature.
- For agreement or RFx questions, contact your Buyer/SCA using Ivalua chat feature.

Before you Ask for Help

- Note the exact task you were trying to complete.
- Capture the page where the issue occurred.
- Record any blocking message or validation text shown by the portal.

Appendix A. Quick Reference Glossary

Portal label	What it means for the supplier
General Info	Module used for company profile, documents, P2P information, questionnaires, and supplier record changes.
Agreements	Module used for NDA and TA review, redlining, approval, signature, and repository access.
Sourcing	Module used to manage proposals.
Validations	List located on the supplier portal homepage that require supplier action. The list can include agreements that need to be reviewed, redlined, or signed, or qualifications that need to be verified.
Company Profile	Ivalua tab that houses the supplier profile information such as organization details and required fields.
Documents & Certs	Area where required documents and certifications are uploaded and maintained.
P2P Information	Area for order addresses, remittance details, and banking information are added/maintained.
Questionnaire	Portal form that must be completed when required for onboarding or an RFx.
Request Information Change	Action used to request changes to supplier company profile information after activation.

A.1 General Info Terms and Buttons

Terms and actions commonly used in this module of the supplier experience.

Type	Label / button	Meaning for the supplier
Term	Supplier Portal homepage	Main landing page for supplier activity. It provides module navigation, alerts, validations, and access to the supplier record.
Term	General Info	Module used for company profile information, documents, P2P information, questionnaires, and supplier record updates.
Term	Validations	Dashboard list of items that require supplier action, such as questionnaires, agreements, or signature steps.
Term	Company Profile	Tab that stores supplier identifiers, administrative details, and other required profile fields.
Term	Documents & Certs	Tab used to upload and maintain W-9 or W-8 forms, insurance, certifications, and other required documents.
Term	Contacts	Tab used to maintain supplier users and other contacts associated with the supplier record.
Term	P2P Information	Tab used to maintain order addresses, remittance details, and banking information.
Term	Qualifications	Area used for questionnaires, eligibility-related responses, and other qualification data.
Term	Onboarding	Process used to complete required supplier data, documents, questionnaires, and banking details before activation.
Term	Request Information Change	Post-activation action used to request changes to supplier company profile information.
Term	Order Address	Address Peraton should use for ordering activity.
Term	Questionnaire	Required form that must be completed for onboarding, compliance, or program-specific purposes.
Button	Save	Stores your entries on the current page. Use it before moving to another tab or action.
Button	+Create Contact	Opens a new supplier contact record.
Button	Send Message	Sends the selected contact a portal message, such as a password setup or access-related message.
Button	Add Other	Adds a document in Documents & Certs when no more specific add button applies.
Button	+Order Address	Creates a new order address record.
Button	+Add Payment Information	Creates a new remittance and banking record.
Button	Answer Questionnaire	Opens the questionnaire so the supplier can complete required responses.
Button	Submit for Activation	Sends the completed supplier record to Peraton for final review and activation.
Button	Submit for Approval	Routes a change, such as a company update or banking update, for review and approval.

A.2 Agreements

Terms and actions commonly used in this area of the supplier experience.

Type	Label / button	Meaning for the supplier
Term	Agreements	Module used to review, redline, approve, sign, and download NDAs and TAs.
Term	Validations	Homepage list showing agreements that are ready for supplier review, approval, or signature.
Term	Agreement Details	Agreement page that displays general information, negotiated terms, dates, and other agreement data.
Term	Hierarchy	View that shows the main agreement and any related amendments or sub-agreements.
Term	Documents	Tab used to view the agreement and download a Word or PDF copy.
Term	Workflow Status	Status indicator showing where the agreement is in the process, such as draft review, supplier signature, or signed.
Button	Approve	Accepts the current agreement draft and returns it to Peraton for the next signature step.
Button	Edit	Enables redlining so the supplier can revise the agreement and add comments.
Button	Comment icon	Adds an explanatory comment to highlighted redlined text.
Button	Save	Stores redlines and comments before the agreement is returned to Peraton.
Button	Send for Peraton Review	Returns the redlined agreement to Peraton for review and response.
Button	Reject	Declines the current agreement version so the review cycle can continue.
Button	Sign	Provides the supplier’s final agreement sign-off when the document returns for signature.
Button	Manage Agreements	Opens the repository of agreements available to the supplier.
Button	Word / PDF	Downloads a copy of the agreement for offline review or retention.

A.3 Sourcing / RFx

Terms and actions commonly used in this area of the supplier experience.

Type	Label / button	Meaning for the supplier
Term	Sourcing	Module used to manage RFx invitations, proposal responses, discussions, and submission status.
Term	RFx	Request sent to the supplier for information, pricing, documents, certifications, or a formal proposal response.
Term	Sourcing Event	Overall event record that contains the RFx overview, documents, questionnaires, items, and discussions.
Term	Proposal Progress	Status of the supplier response, such as Awaiting Acknowledgement, In Progress, or Submitted.
Term	Lot	Subsection of a sourcing event.
Term	Round	Distinct phase of the RFx event.
Term	RFx Status	Current stage of the RFx, such as Open or Closed.
Term	RFx Documents	Documents attached to the RFx by Peraton for supplier review.
Term	Early Contract Documents	Terms, clauses, or contract-related documents attached to the RFx.
Term	Info	Proposal information page used to name the proposal and complete baseline event details.
Term	Questionnaires	Page used to complete required RFx forms and questions.
Term	Items	Pricing grid or quotation form used to enter line-item pricing and related details.
Term	Discussions	Chat or message area used to communicate with the Peraton point of contact during the RFx.
Term	History	Audit trail showing prior actions taken on the proposal.
Term	My Team	Area used to identify supplier contacts who should participate in the RFx response.
Button	Acknowledge Receipt	Confirms that you received the RFx and are ready to respond.
Button	Will Bid / No Bid	Indicates whether you intend to participate in the RFx.
Button	Submit	Saves the bid or no-bid response, or submits another step when shown on the page.
Icon	Edit pencil	Opens a proposal or line item so you can update the response.
Button	Export	Downloads the pricing sheet when offline completion is allowed.
Button	Compose	Starts a new discussion message in the Discussions area.
Button	Validate and Submit Proposal	Runs checks on the proposal and starts the submission process.
Button	Submit the proposal	Final submission action after validation issues are resolved.