S2P IVALUA TRAINING

CONTENT

- Using the portal as a supplier
- Accesible activities for suppliers
- Performance Evaluation
- Supplier Quality (Incidents, Collaboration Plans, NPI)

As a Supplier, you access the Portal via the Public Login Page

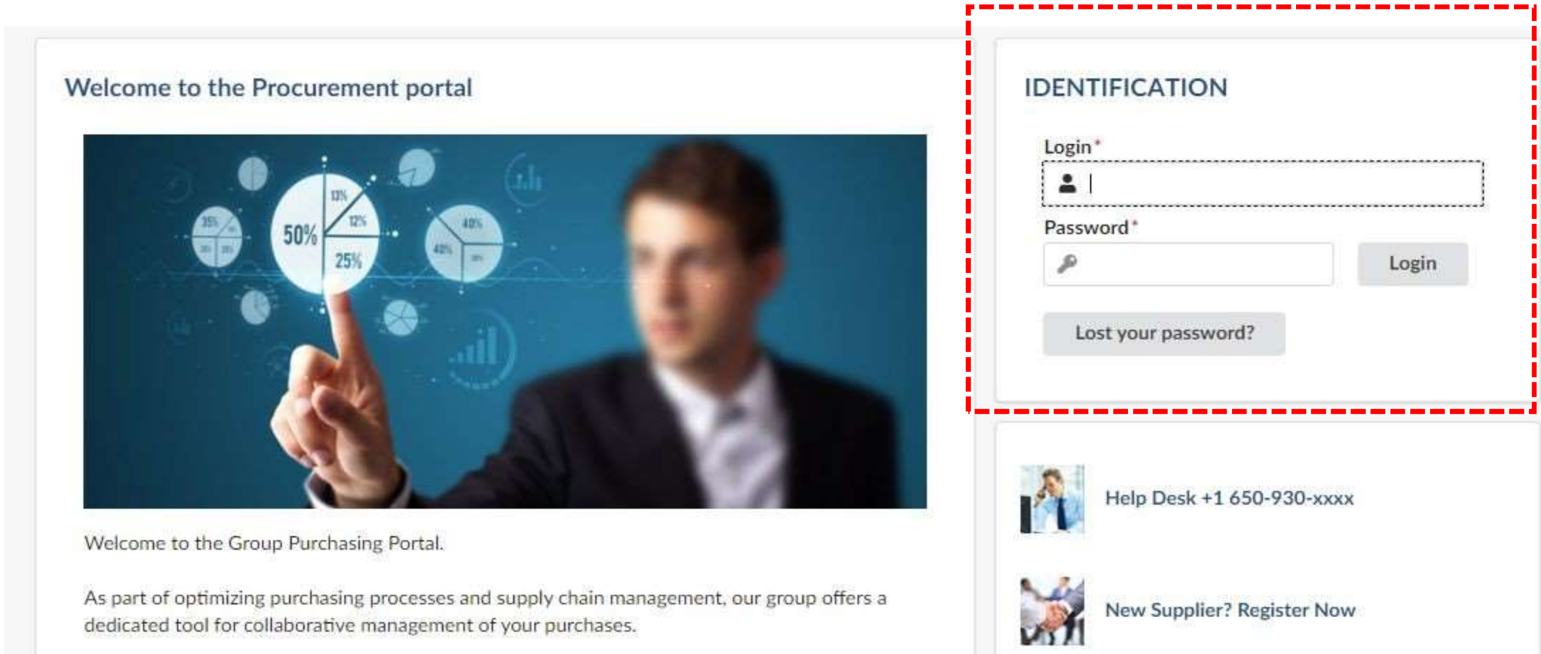
- Once registered, you receive an email with your login and a temporary password.

Subject

Access to Ivalua Buyer

Notification body

DearWIKK AAAA,
You have just been given access to the Ivalua application for supplier Supplier ABCD with the following user ID: addd@aaa.com.
You must create your password by accessing the following page: Set password.
You will then be allowed to log in to Ivalua: Login.



Password expiration

Access to Ivalua Buyer

BO Buyer - O-I <no.reply@o-i.com>
To [redacted]

To help protect your security, the Follow Up flag text has been hidden. Follow up.
Click here to see hidden text.

Dear [redacted]

You have just been given access to the Ivalua application for supplier with the following user ID: tom.gross@pdr-na.com.

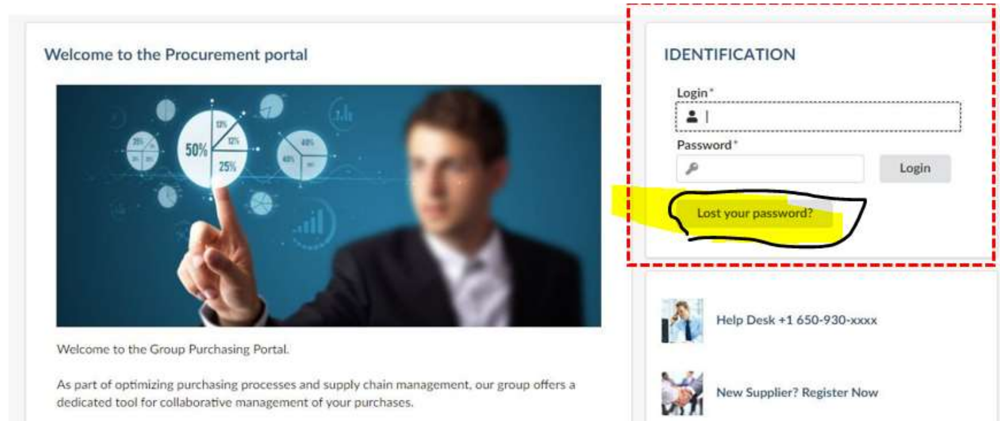
You must create your password by accessing the following page: Set password.

You will then be allowed to log in to Ivalua: Login.

Please refer to the supporting training materials provided here.

This is an automatically generated e-mail, please do not reply

Click here to manage your notifications settings.

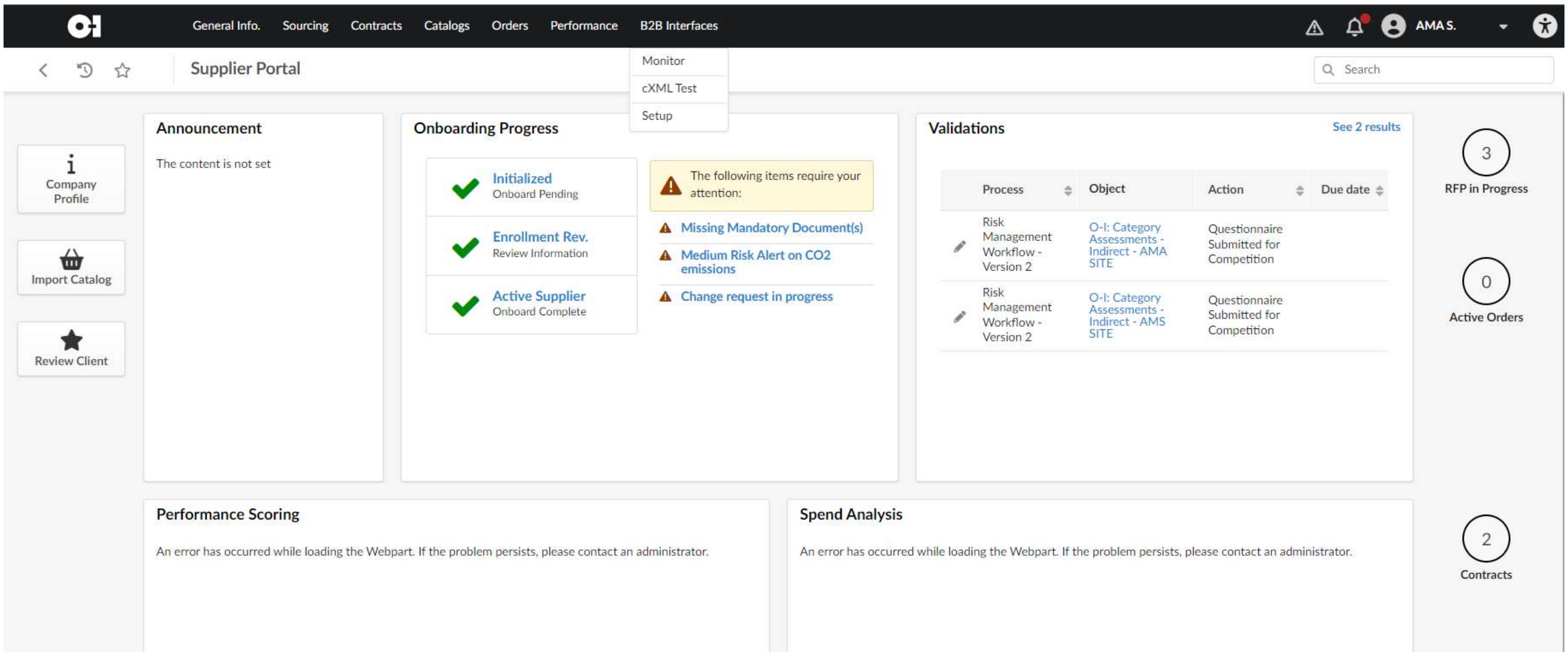


Notes:
Password token validity lasts 1 week and the Password reset token validity lasts 1 hour.
The Password reset token validity comes to play when the vendor clicks the “forgot password” link.

<u>If the password expire, please follow :</u>
Go to the login screen and again try to click on forgot password and then change the password instead of directly going to the reset password link in the email.

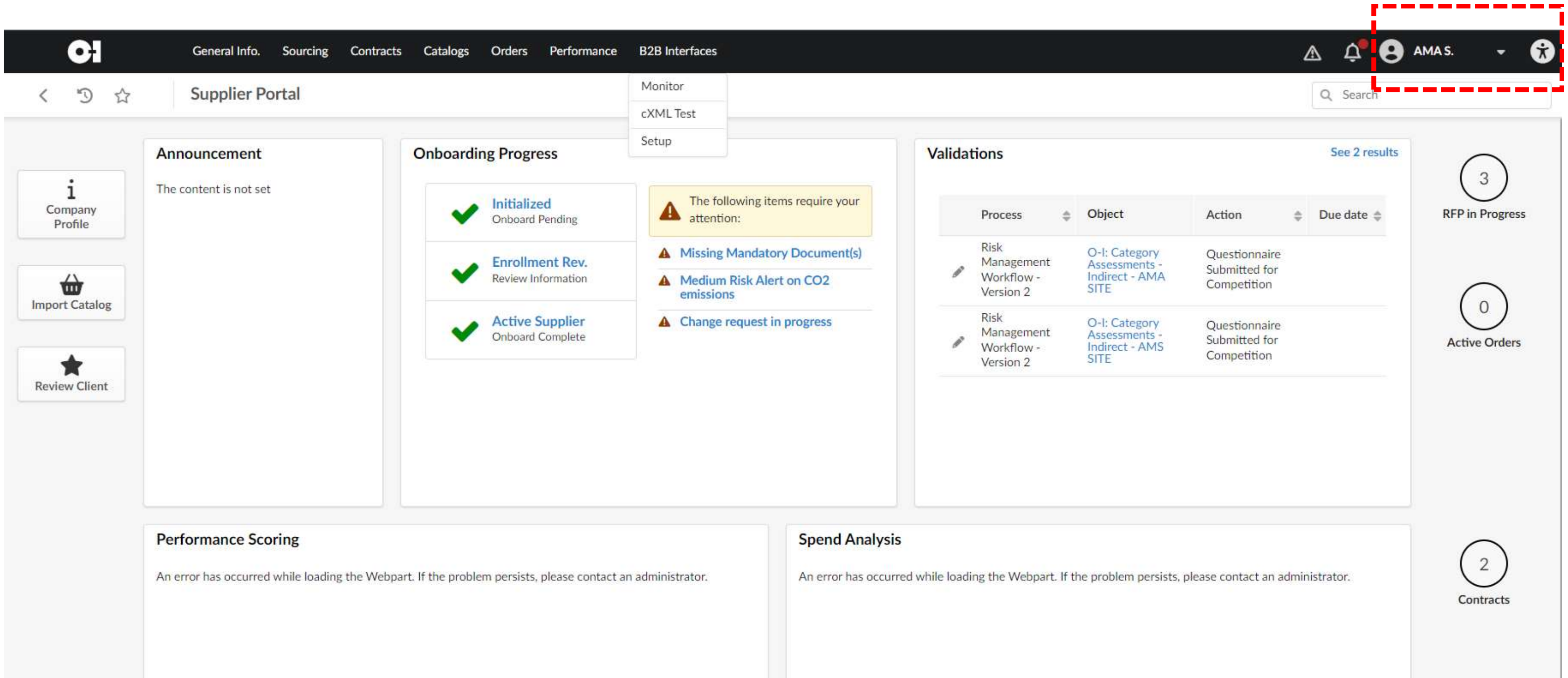
You Land on the Supplier Portal Homepage

- The Homepage contents can be configured.
- The data segregation is strict: each supplier can only see their own data.



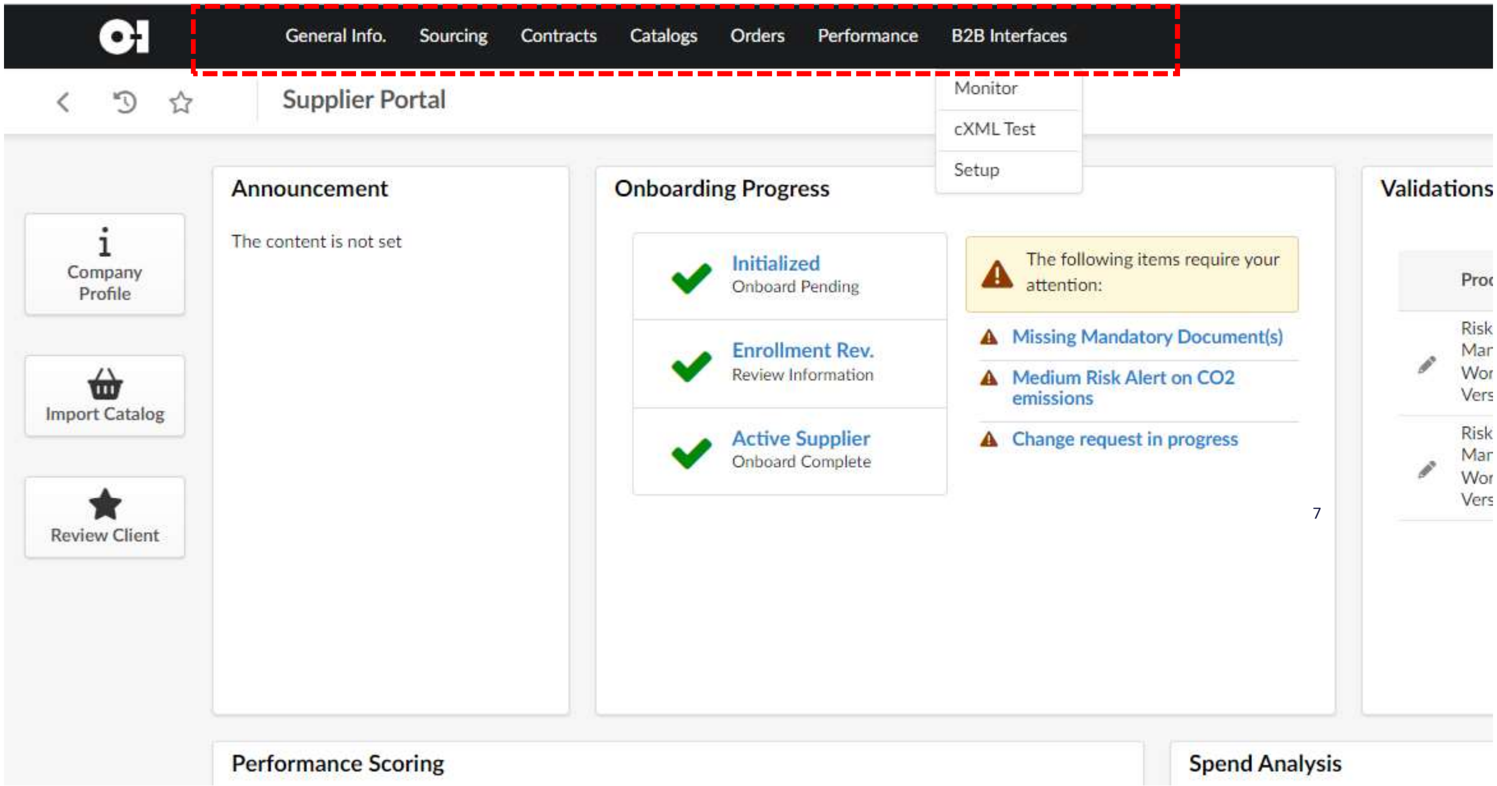
To navigate between different entities of your Company, use the Supplier selector

- If your company is made up of a **Group** level and several **Site** levels, each is stored as a distinct supplier in Ivalua.
- If there is a Supplier Group and Supplier Sites, each will have their data in a separate space.



Supplier Menus are distinct from Internal Menus

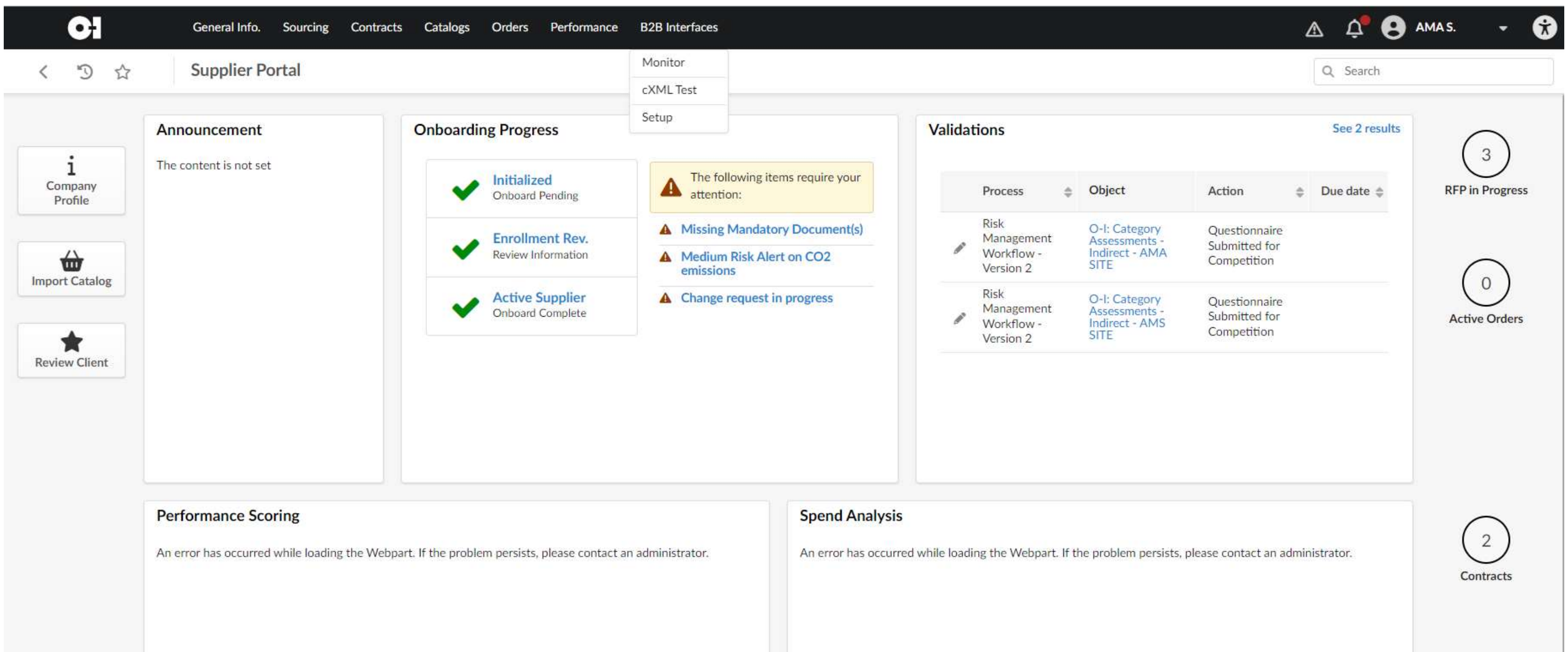
- Supplier have a restricted accesses compared to O-I users. They usually see fewer menus.
- Menus displayed depend on the modules enabled in the application.



Accessing your workflow tasks and calendar tasks

In the drop-down menu below your name, you can:

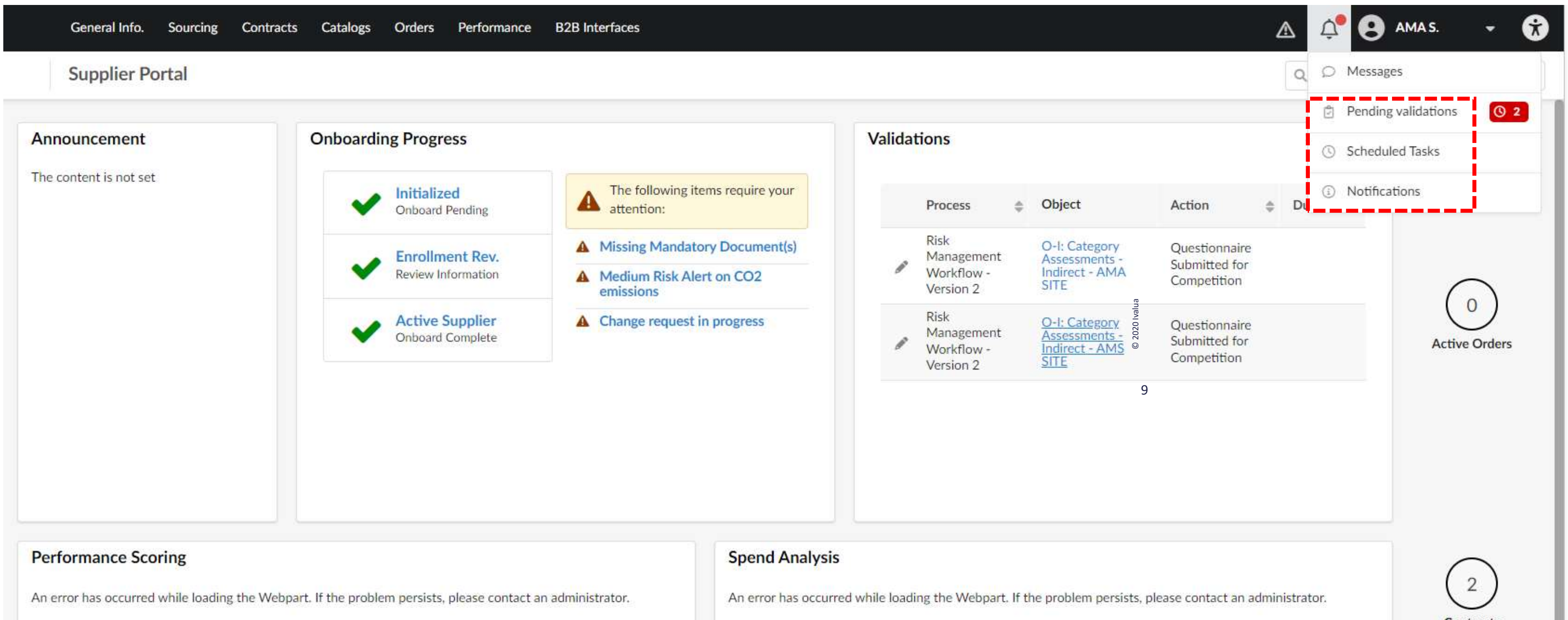
- Delegate your workflow tasks (My profile)



Accessing your workflow tasks and calendar tasks

Click on the bell icon next to you name, and you can:

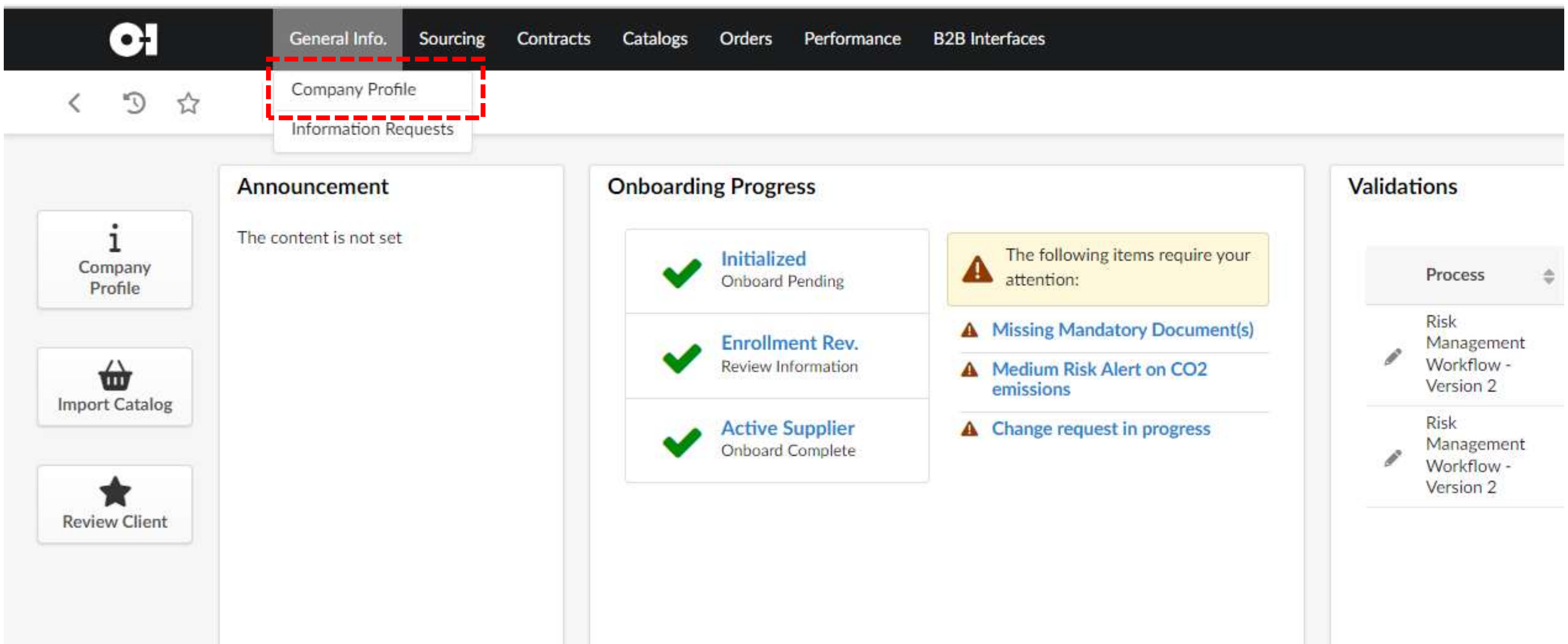
- Access your pending workflow approvals (*Pending validations*)
- Access your calendar tasks (*Scheduled Tasks*)
- Access the notifications (RFx invitations…)



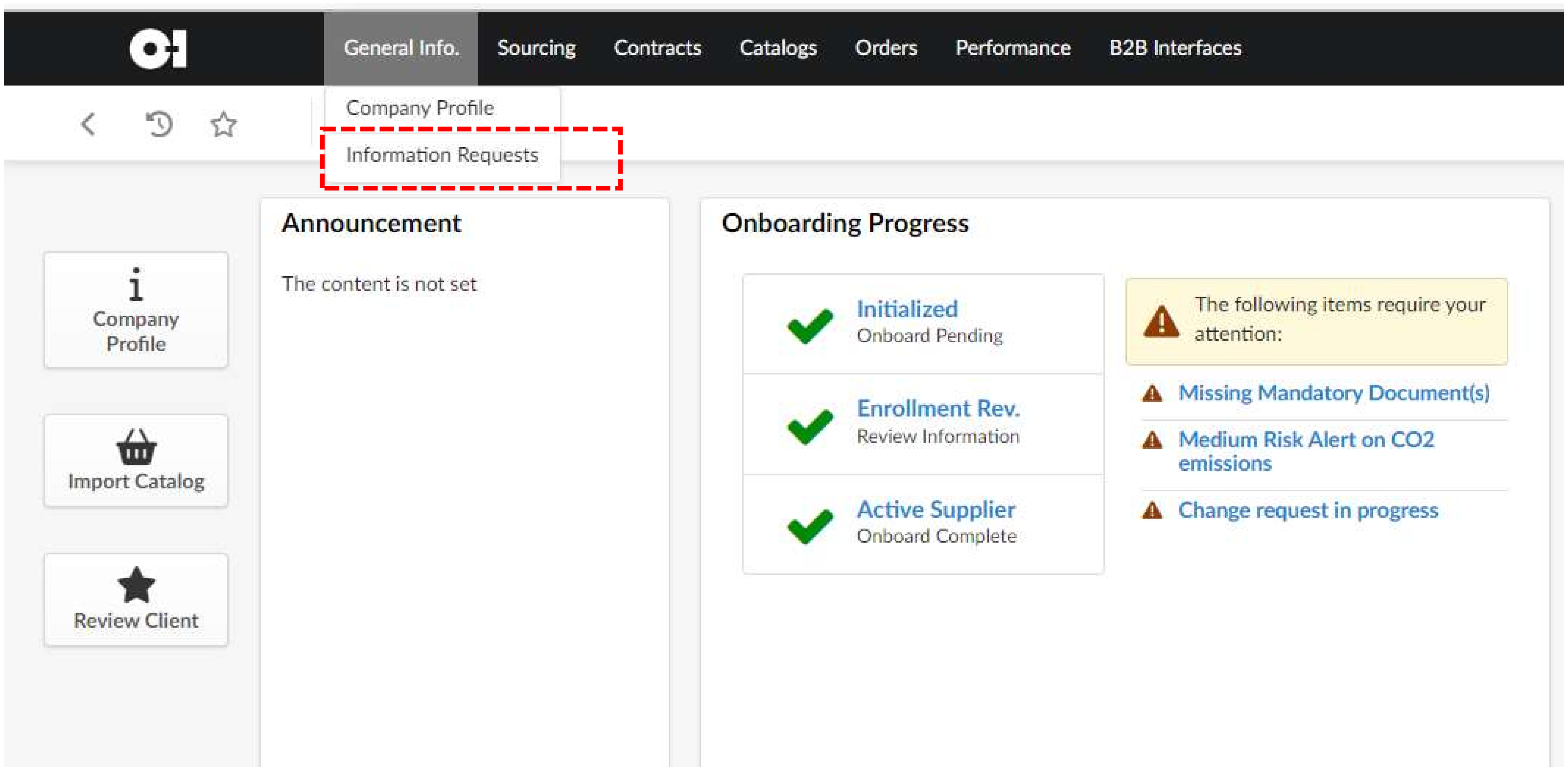
ACCESSIBLE ACTIVITIES FOR SUPPLIERS

To Maintain your supplier Data, go to *General Info. > Company Profile*

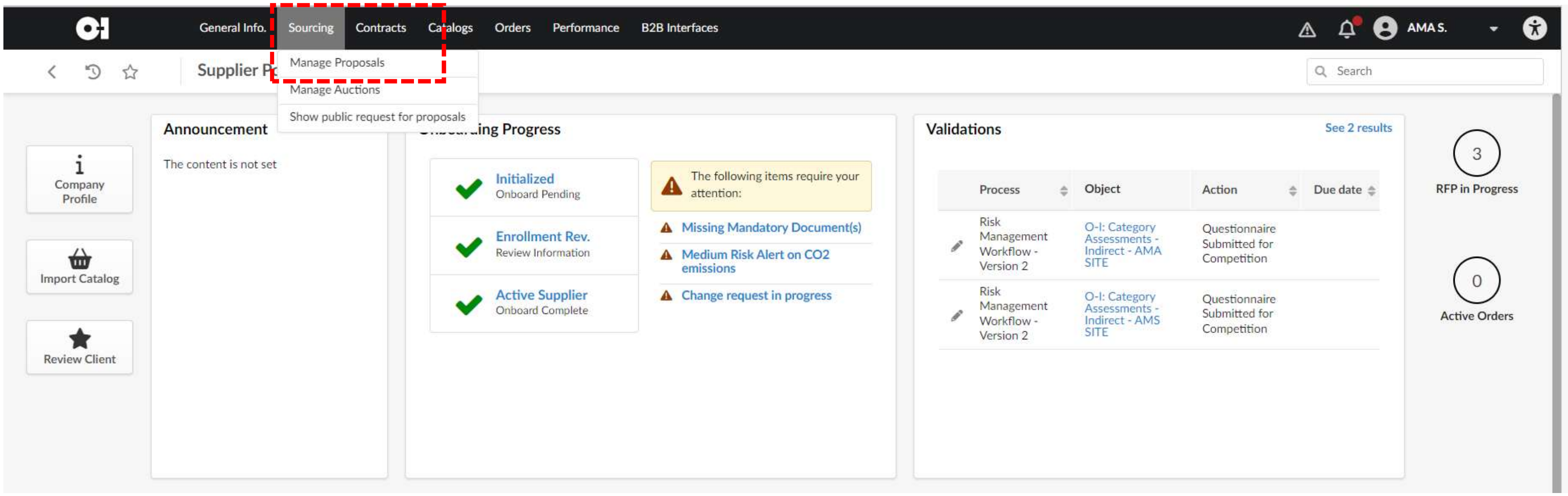
- There is a dedicated deck on this topic.



To Answers RFIs, go to *General Info. > Information Requests*

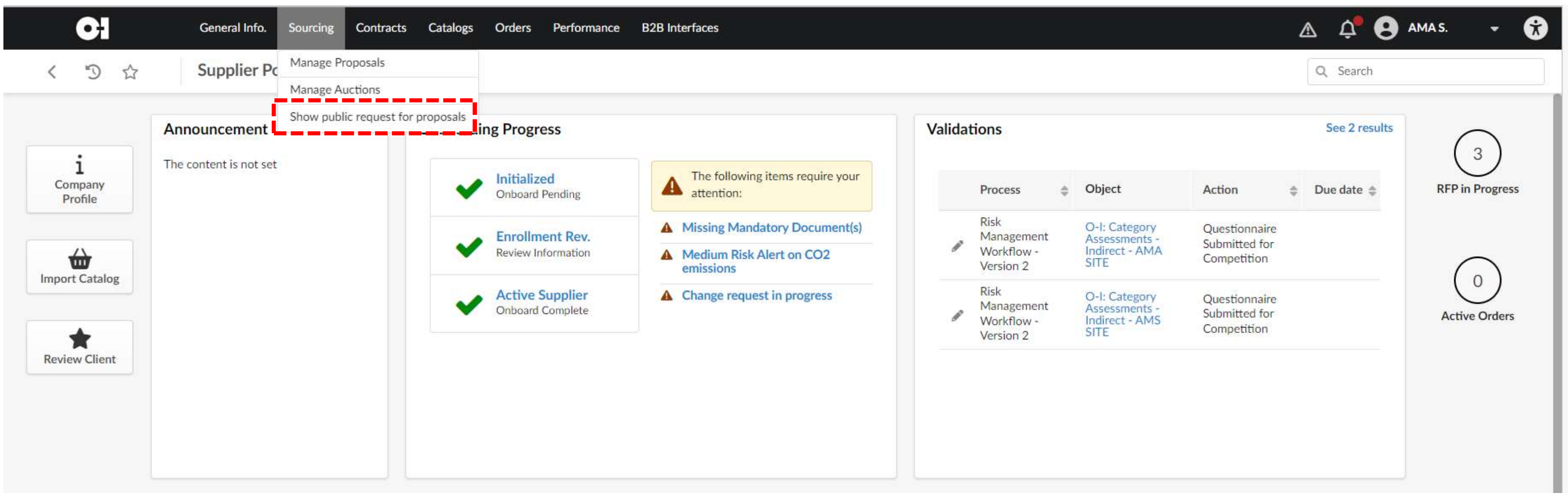


To answer an RFx, go to *Manage Proposals*

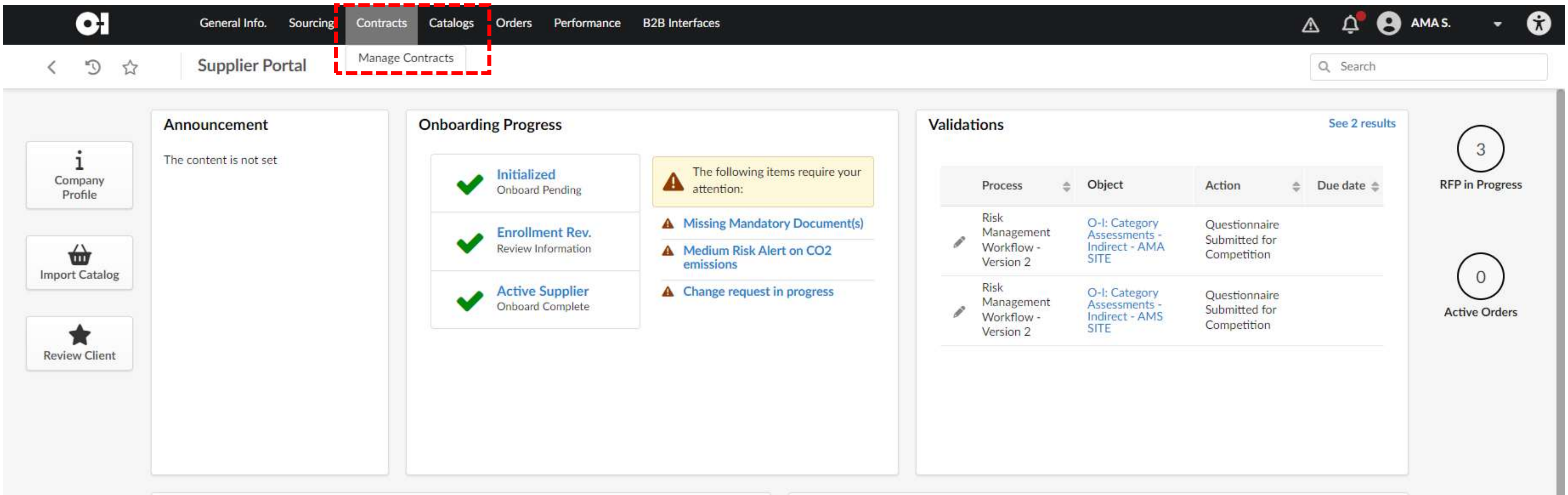


If there are Public RFx, you can review them and request to be invited

- Public RFx are those where part of the information is accessible to un-invited suppliers. They are common in the public sector.

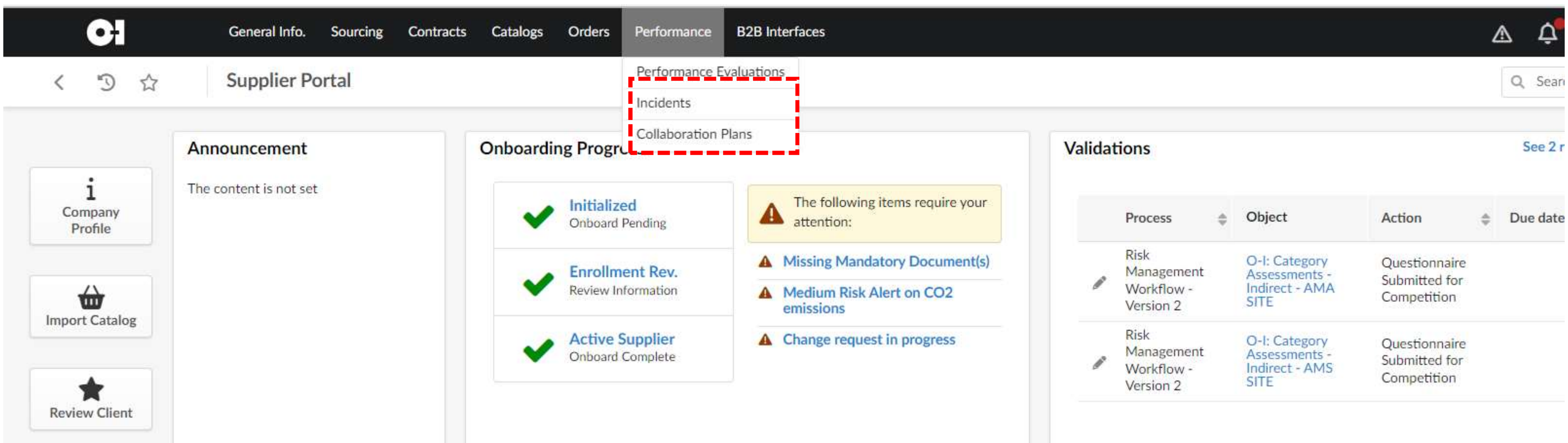


Suppliers can Collaborate on Contract Authoring



Suppliers can see Incidents & Participate in Collaboration Plans

- Suppliers can see Exceptions logged by Buyers on their Deliveries or Orders.
- Suppliers can see tasks assigned to them in Collaboration Plans.



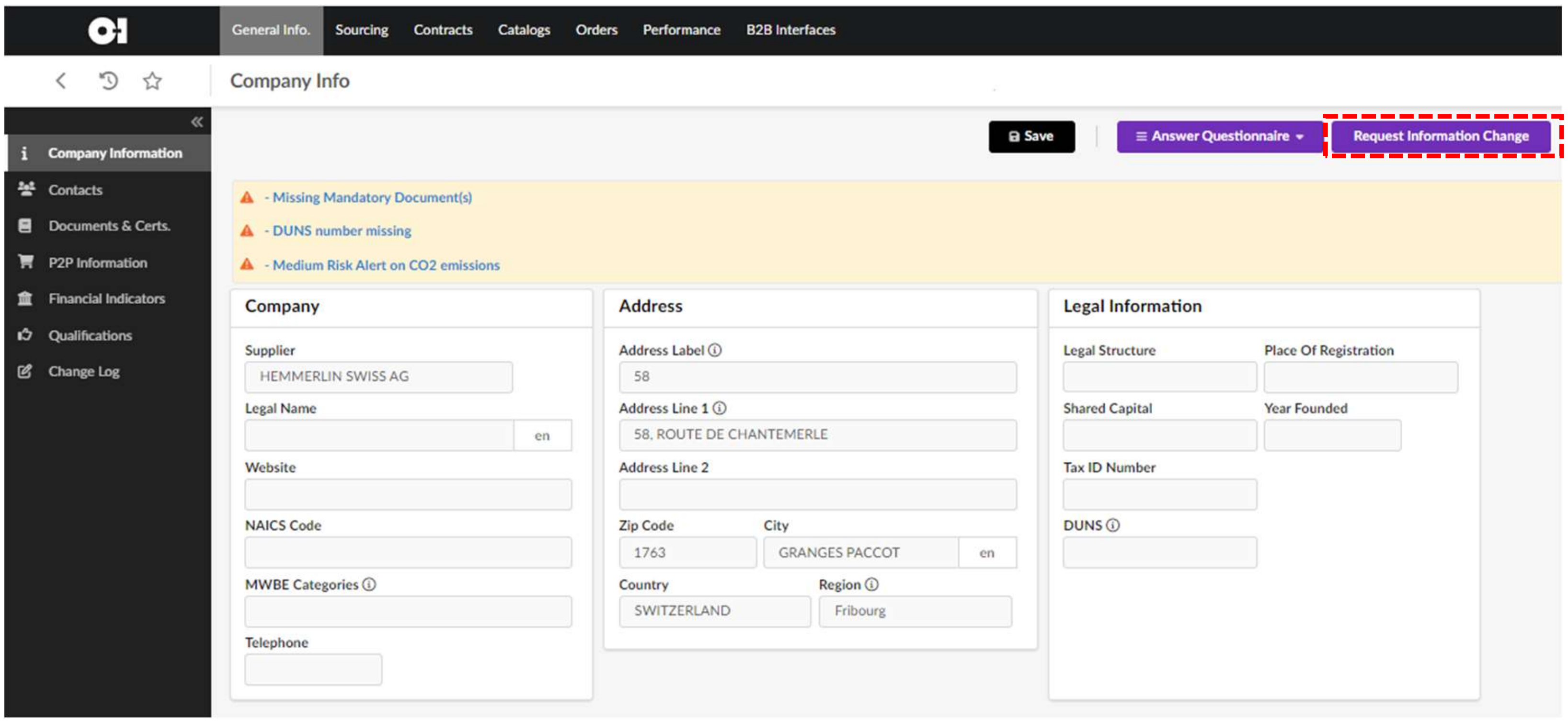
REQUEST COMPANY DATA CHANGE/UPDATE

Request Company Change

You can request at any time the following change/update:

- Company information
- Contact
- Documents & Certificates
- P2P Information
- Financial Indicators
- Qualifications

Once you are logged, your first step is to immediately review/complete/change all your data



Request Company Change (company information)

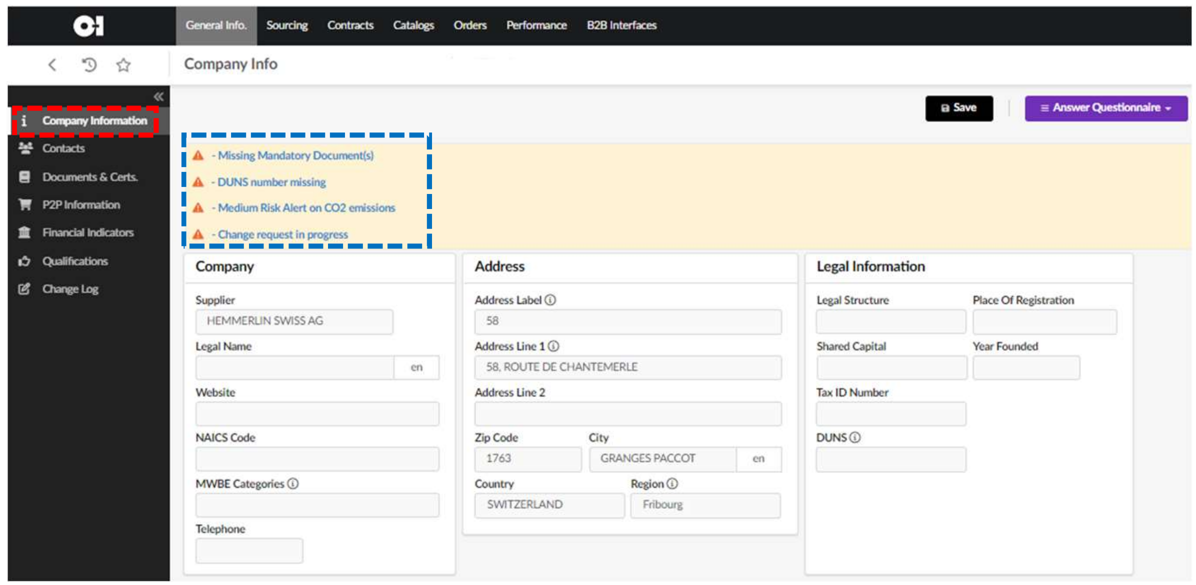
- Enter the reason for the change request
- All the other unlocked fields can be subject to change request

- Warning messages must be treated by you

- Enter the Duns Number. If you do not have a Duns number, please make a request by using the following links:

Duns Registration

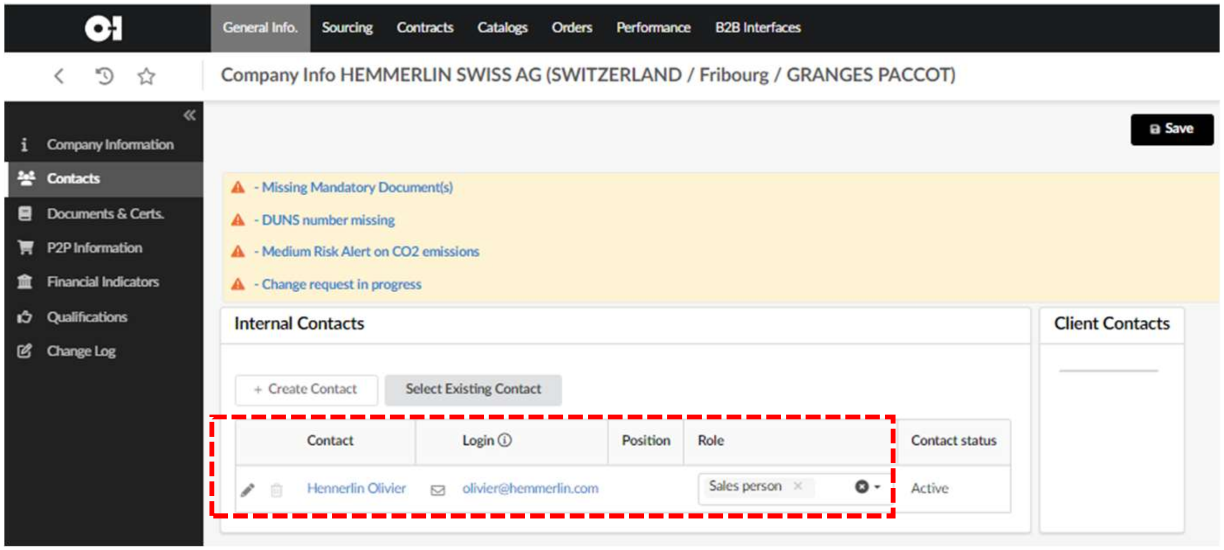
- The excel spreadsheet is available on http://vendors.o-i.com



Request Company Change (Contacts)

At least one contact is mandatory in order to login into Ivalua. Several contacts can be managed depending on their role

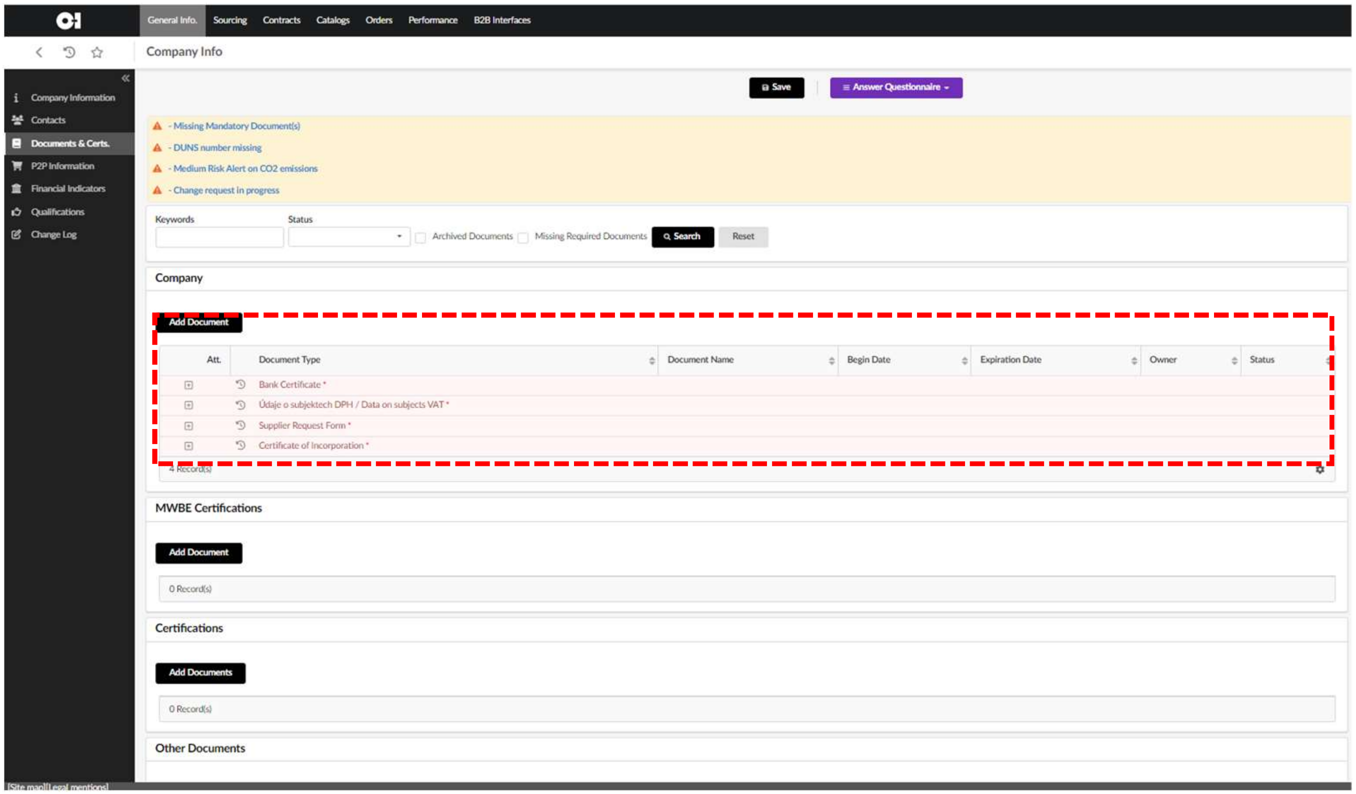
- Please enter the contacts name and their roles (each contact will receive his own login and password)
- A different contact would be involved in a different event (e.g., Sales person to receive a spot bid, quality to receive an audit questionnaire)



Request Company Change (Documents & Certificates)

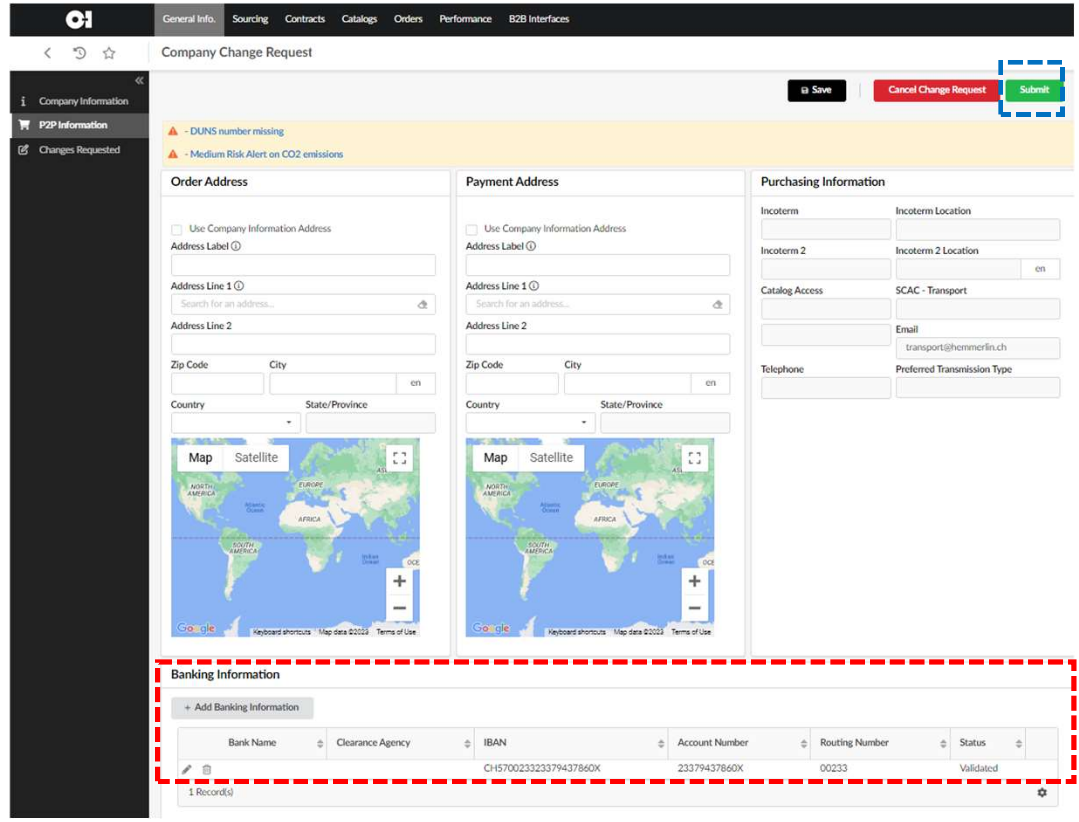
You can attach any document or certificate.

Some documents are mandatory (marked with *) such as Bank Certificate

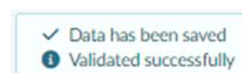


Request Company Change (P2P Information)

- You can update your banking information in real time
- All the other unlocked fields can be subject to change request

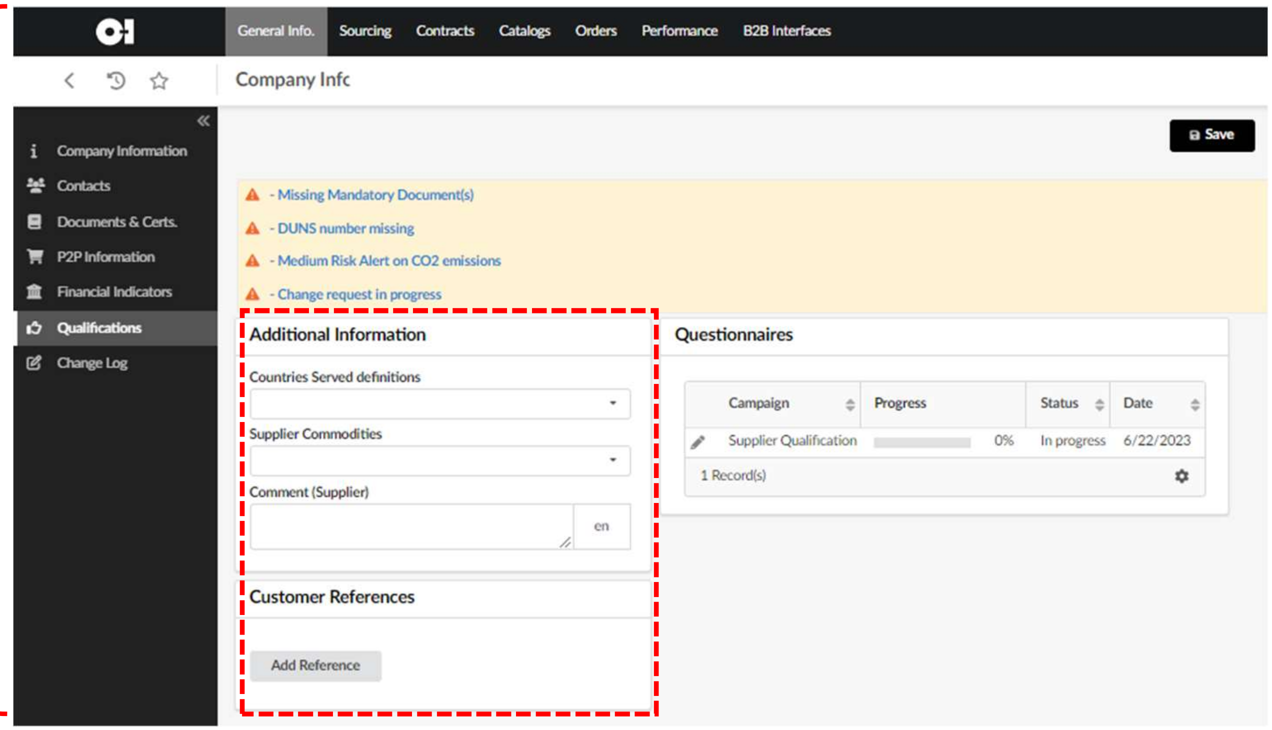


Once the change request has been completed, click **Submit** →

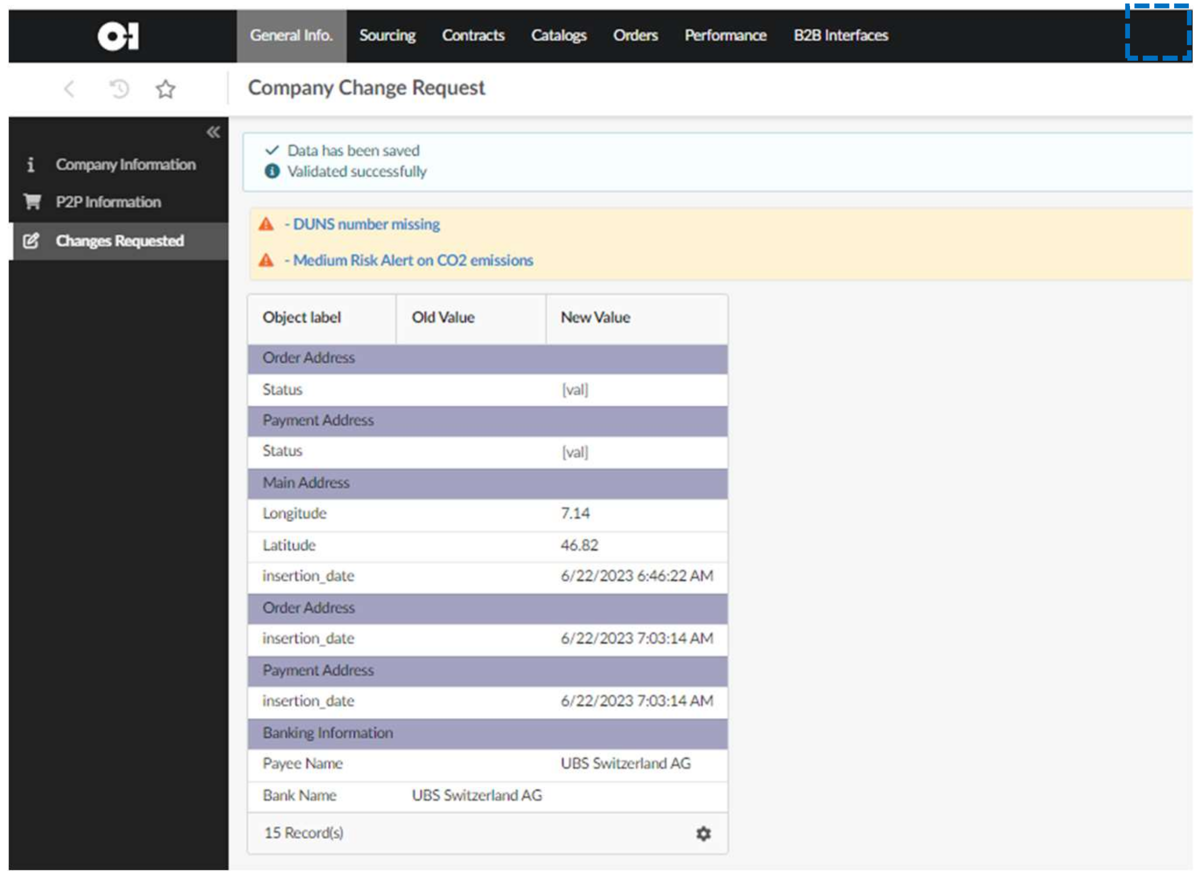


Request Company Change (Qualifications)

- You can update the countries you can serve
- The commodities you can supply
- Customer reference



Request Company Change (Changes Requested)



- In this tab you can see the changes requested

Operations that Suppliers cannot do

Suppliers cannot :

- See other Suppliers data, even though they share the same qualifications.
- See their Performance Evaluations.
- See Purchase Requisitions (only Purchase orders).
- Request Contract Renewal.
- Request access to RFxs that are not public if they are not invited to them.

Ivalua training database link to be added

RESPONDING QUESTIONNAIRES

Questionnaire types

Suppliers may be asked to respond several types of questionnaires:

- RFX – to provide Information, Proposal, Quotation
- Self Audits – to provide input for the supplier evaluation or prepare the ground for an on-site audit
- Data collection – IT Security, Sustainability, Scope 3 emissions, etc…
- Supplier satisfaction surveys

Questionnaires may vary in the form (closed/open questions, selection from a list, tick the box, …) but the answering methodology is the same for all.

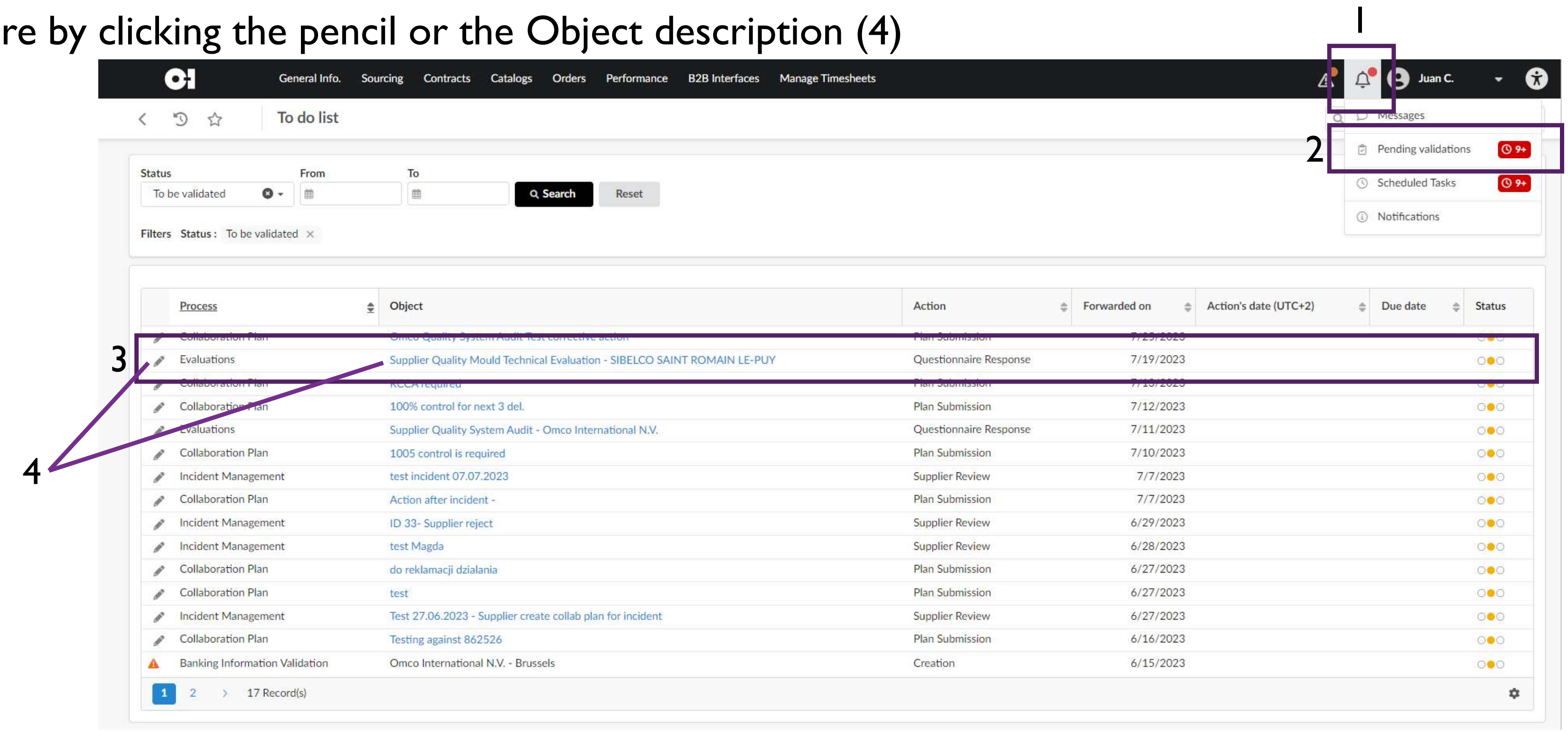
How To Access?

The notifications will pop-up under the bell icon (1)

They are visible within the Pending validations Submenu (2)

Description may vary depending on the questionnaire type (3)

Access the questionnaire by clicking the pencil or the Object description (4)

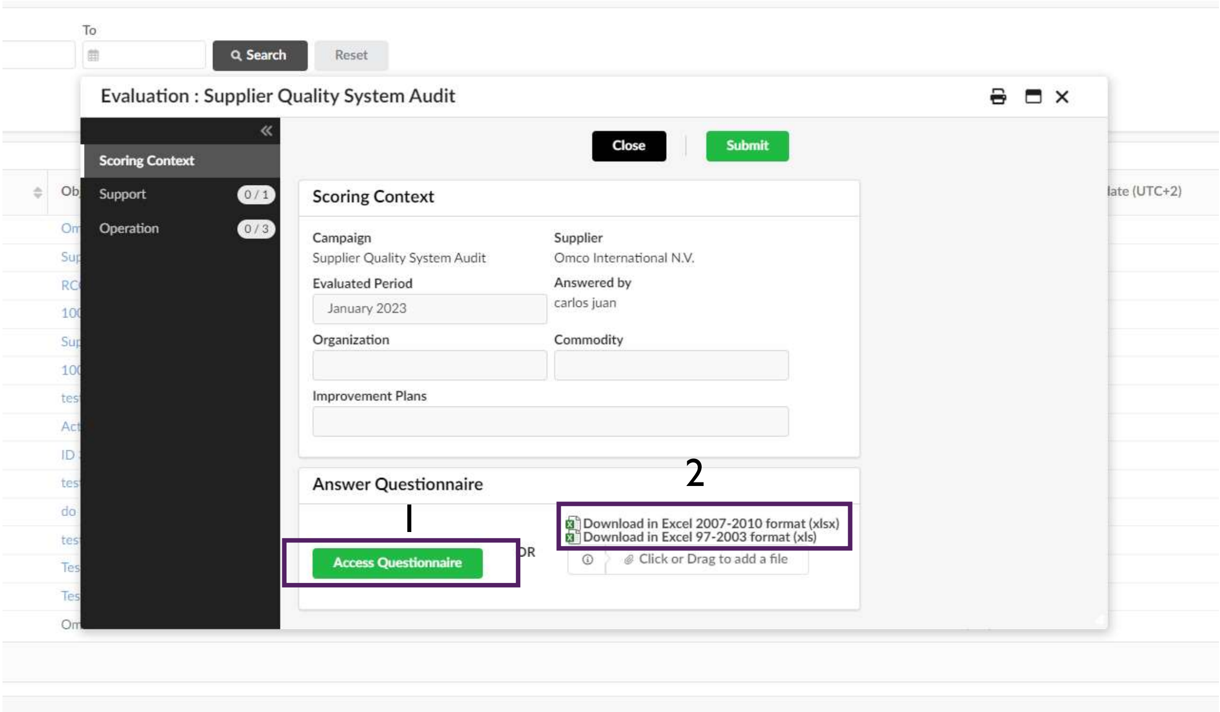


How To Respond?

Once the form pops up the questionnaire can be accessed directly (1) or via the Excel File (2)

In case of the direct access the answers must be provided directly in the system

In case of using Excel the answers can be provided off-line



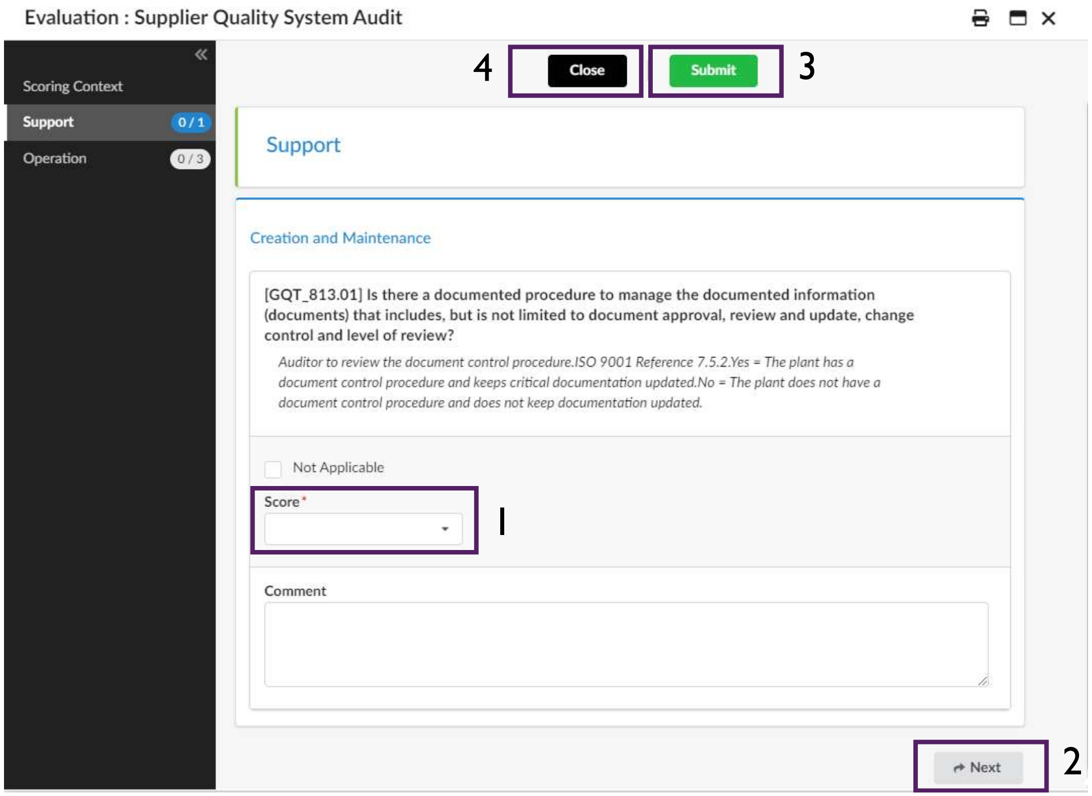
How To Respond?

Answers in the system must be provided to all the questions. Please note the mandatory, star marked questions (1)

To move to next question please click Next button (2)

Once finalized click the Submit button (3)

The form can be filled in several sessions Use the Close button (4) to save the form without submission.



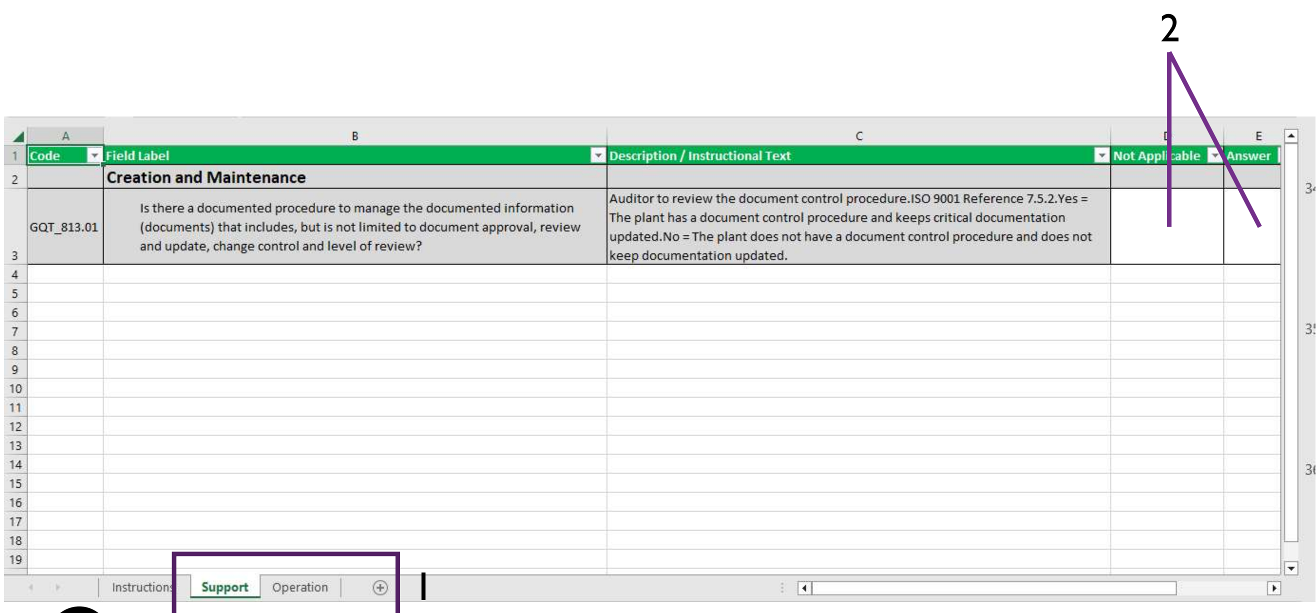
How To Respond?

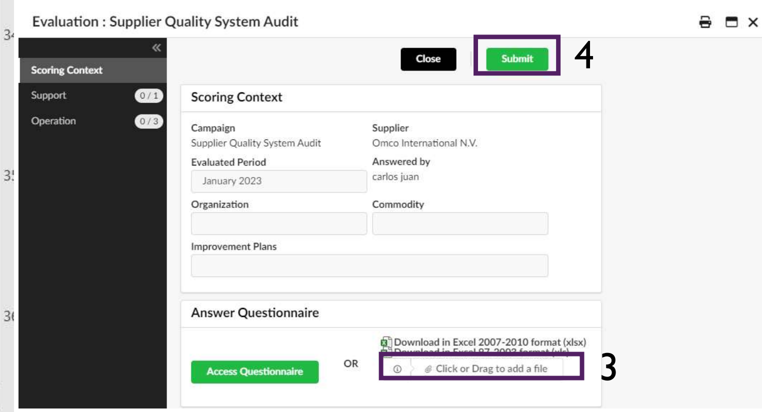
If answering using Excel, feedback must be provided on all the open tabs (1).

All the white cells are mandatory (2)

Once finalized, the file shall be saved with the same name and format.

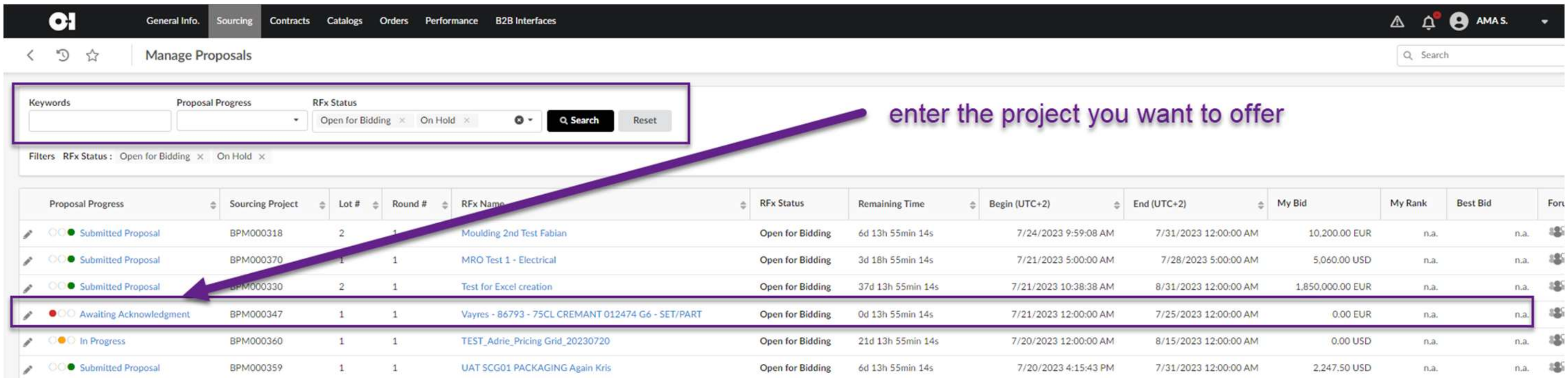
Then it can be saved into Ivalua (3) and Submitted (4)



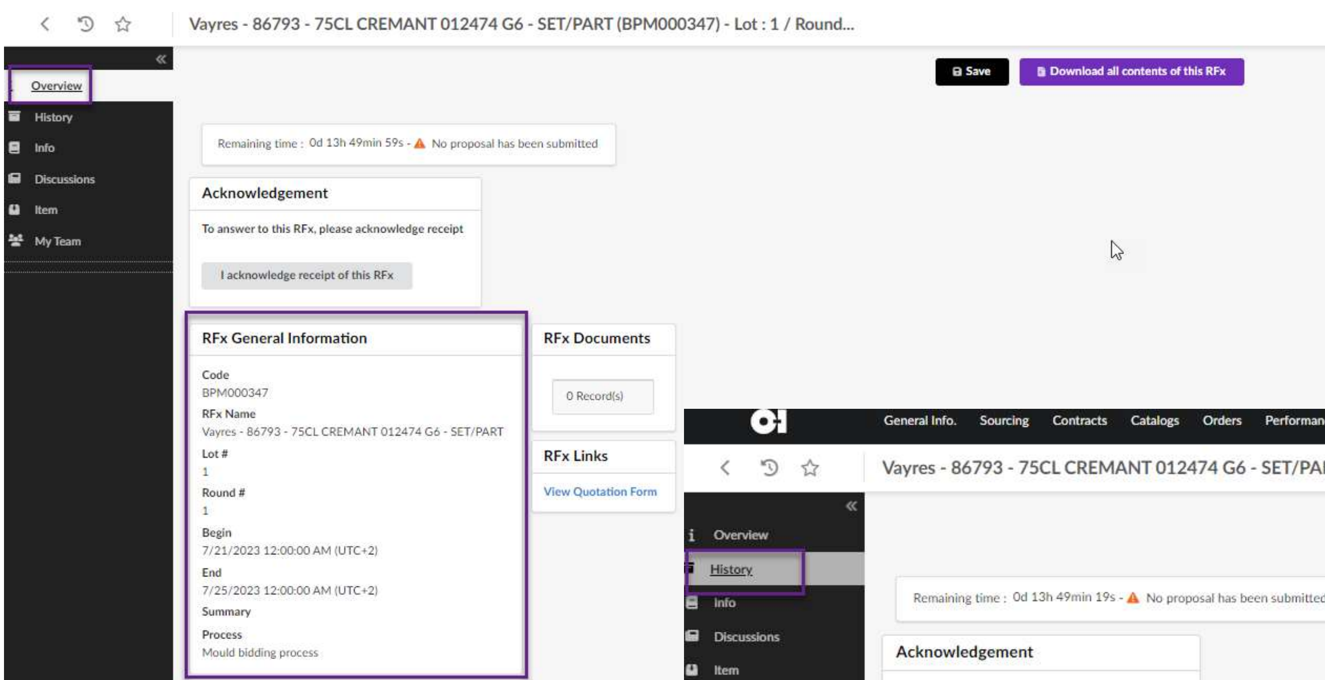


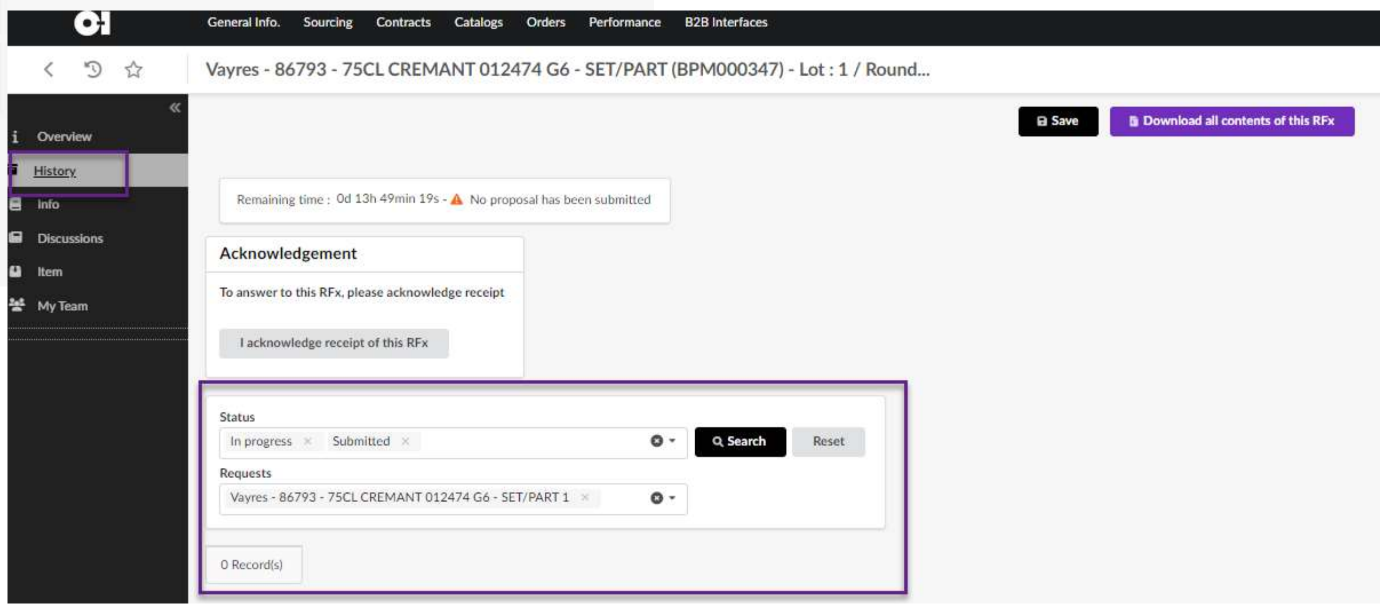
MANAGE PROPOSALS – SUPPLIER PART

To answer an RFx, go to the project which will be offering

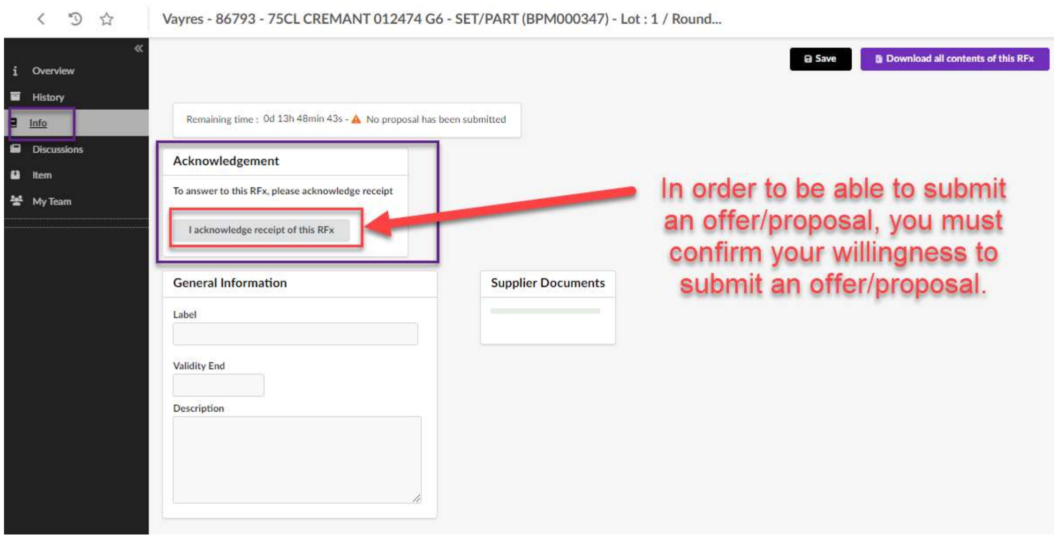


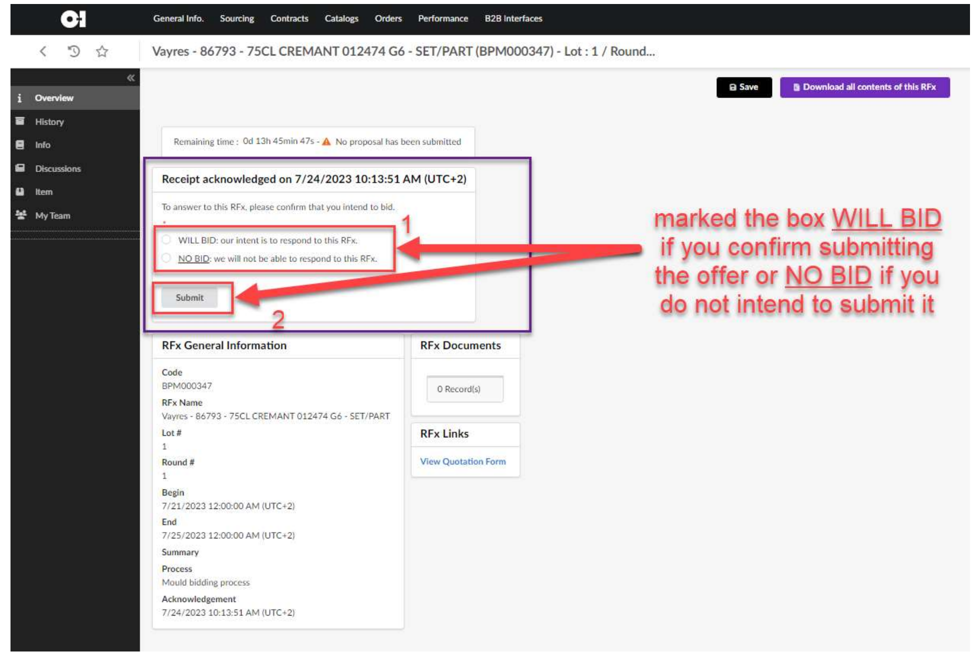
Check the general information about the project

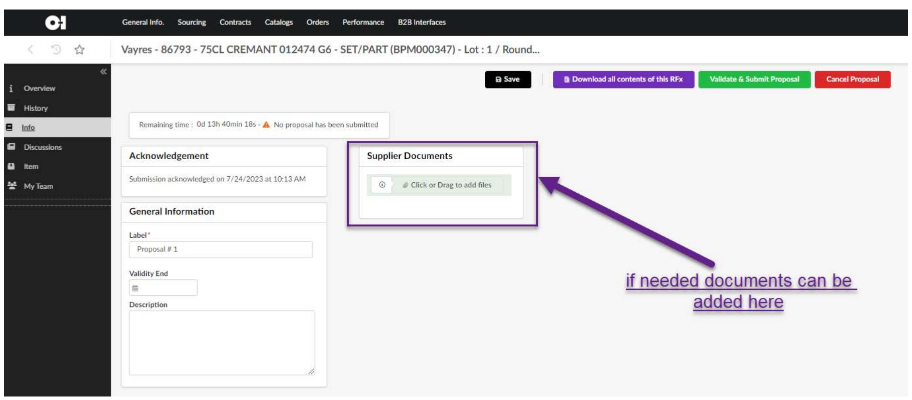




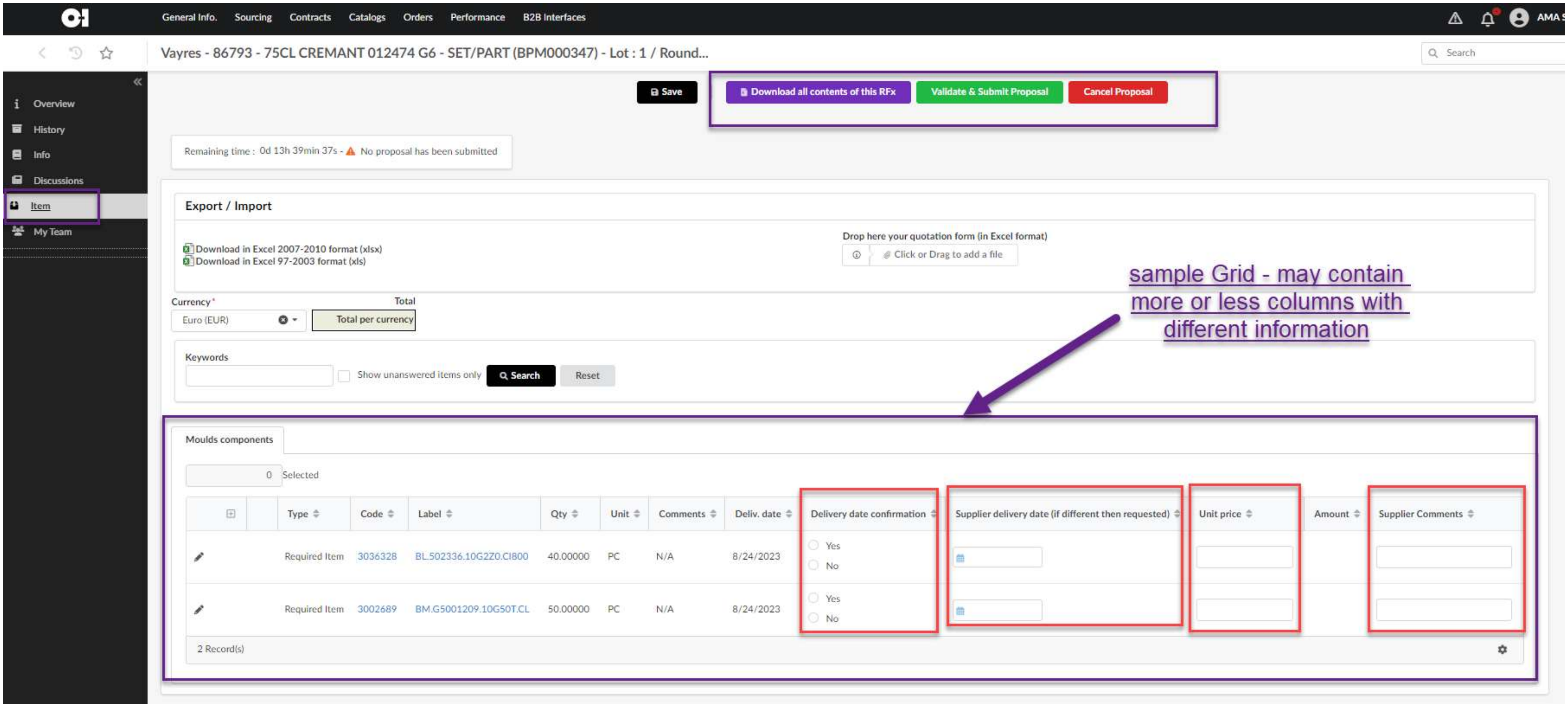
To answer an RFx, please acknowledge recipt



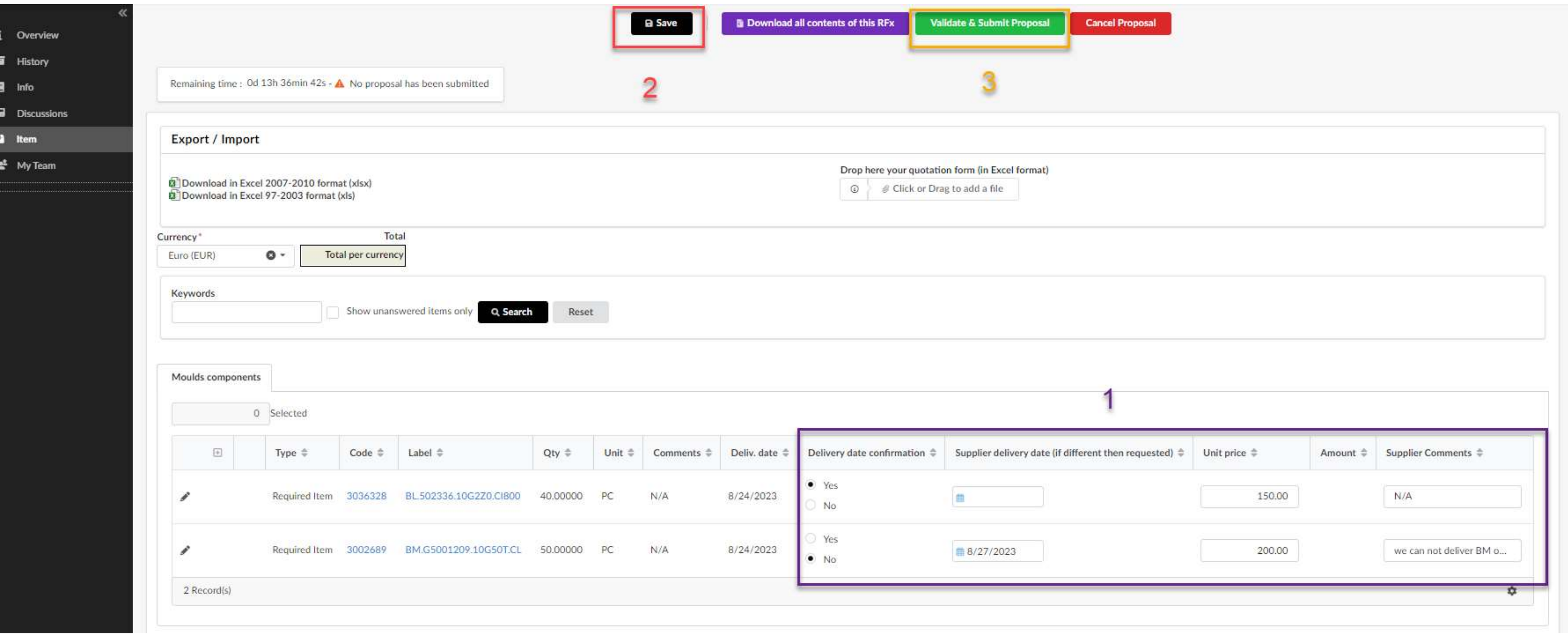




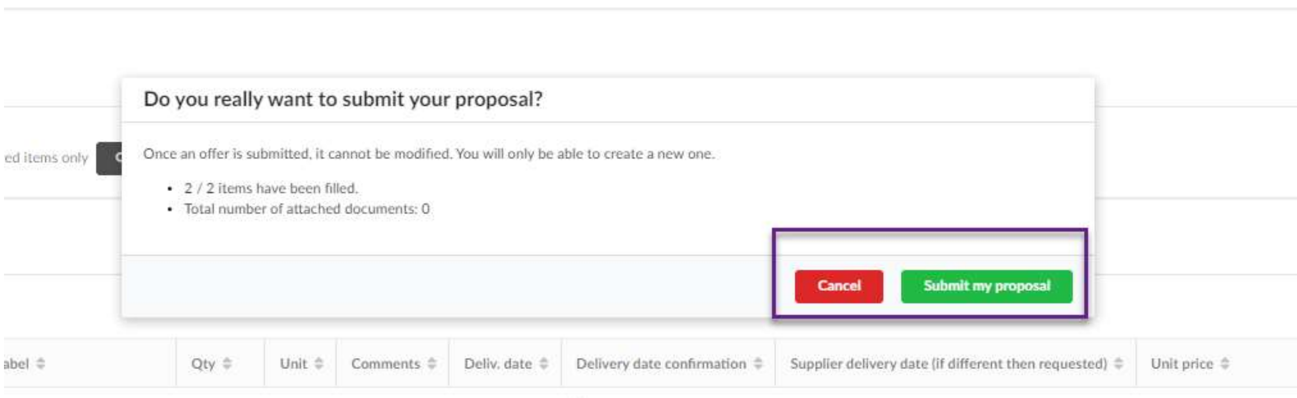
To answer an RFx, please fill in a Grid

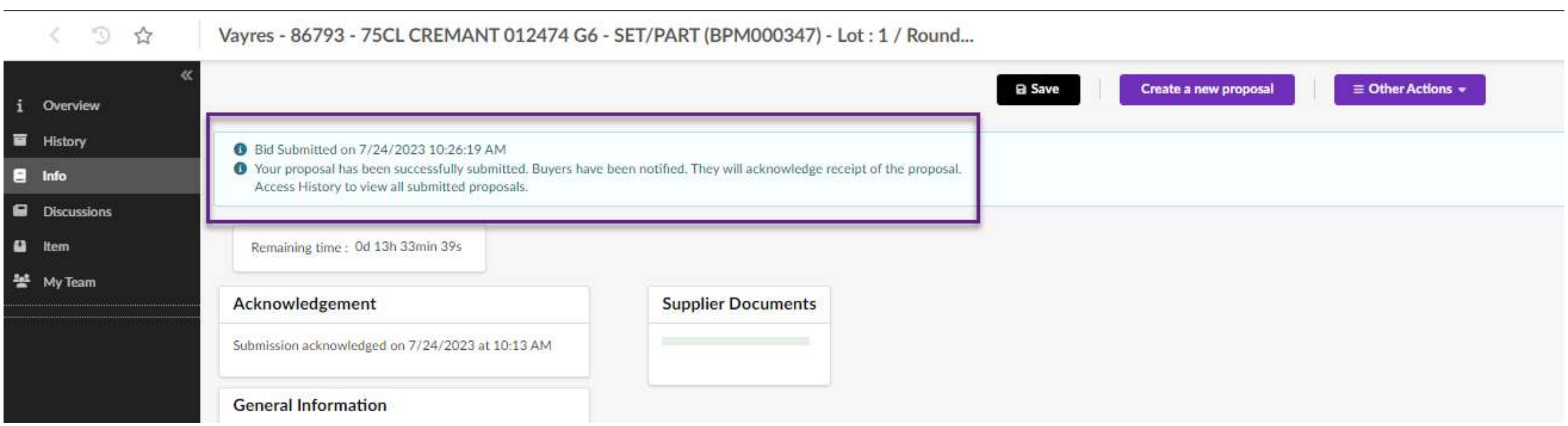


To answer an RFx, please fill in a Grid (next steps)



To answer an RFx, final confirmation

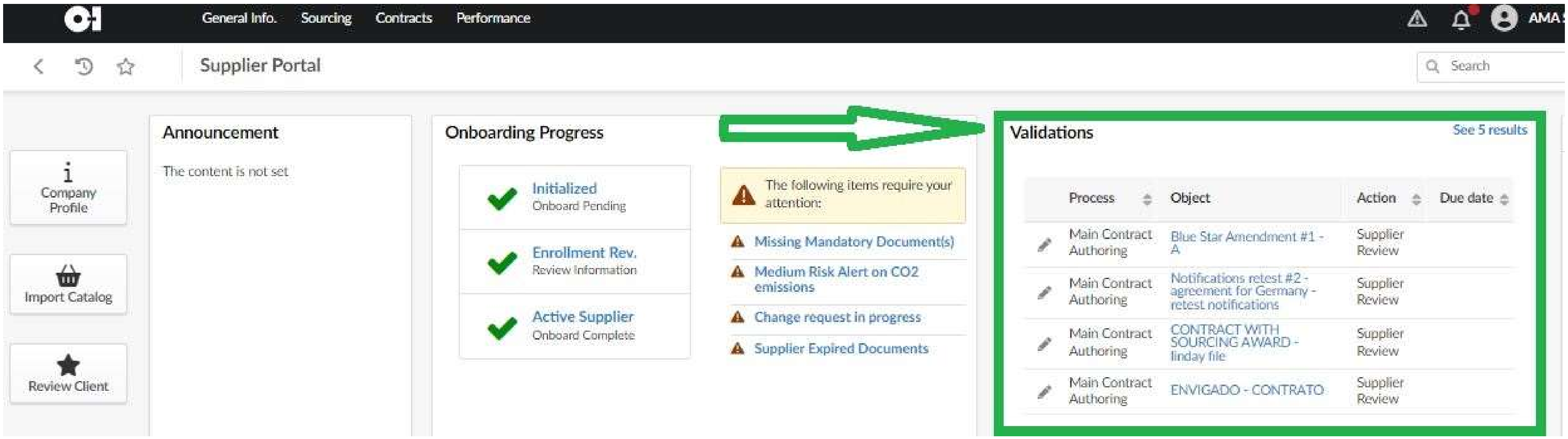




CONTRACT MANAGEMENT

Supplier Portal - Validations

To display contract agreements shared by O-I use VALIDATIONS section in the dashboard of Supplier Portal:



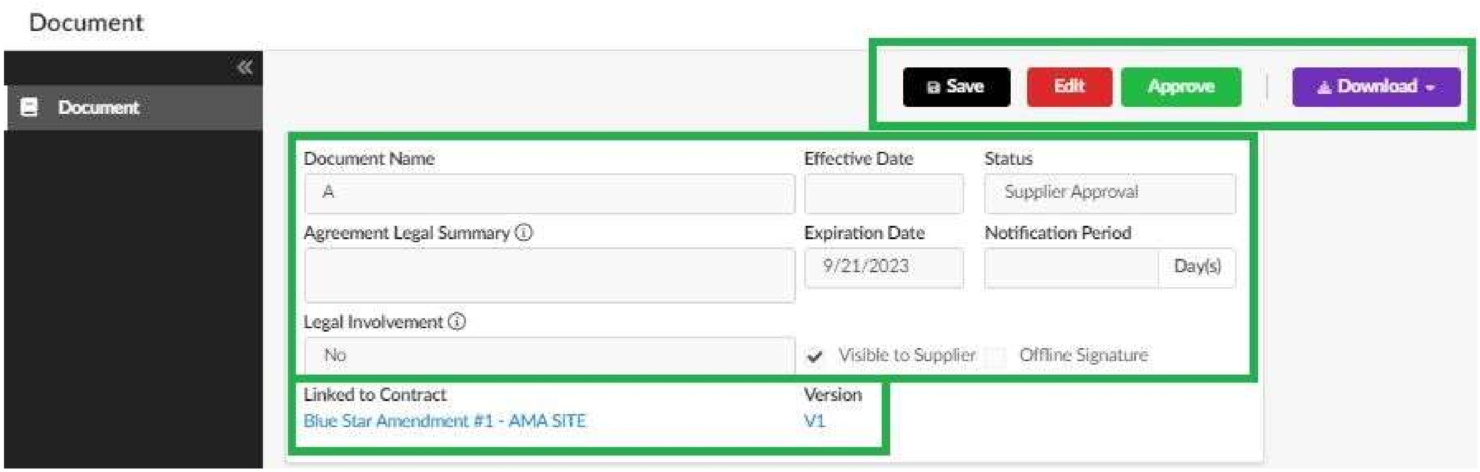
Contract management - Agreement Document

To act on the agreement, click into item, you will see document window.

On top you have active buttons to perform following activities:

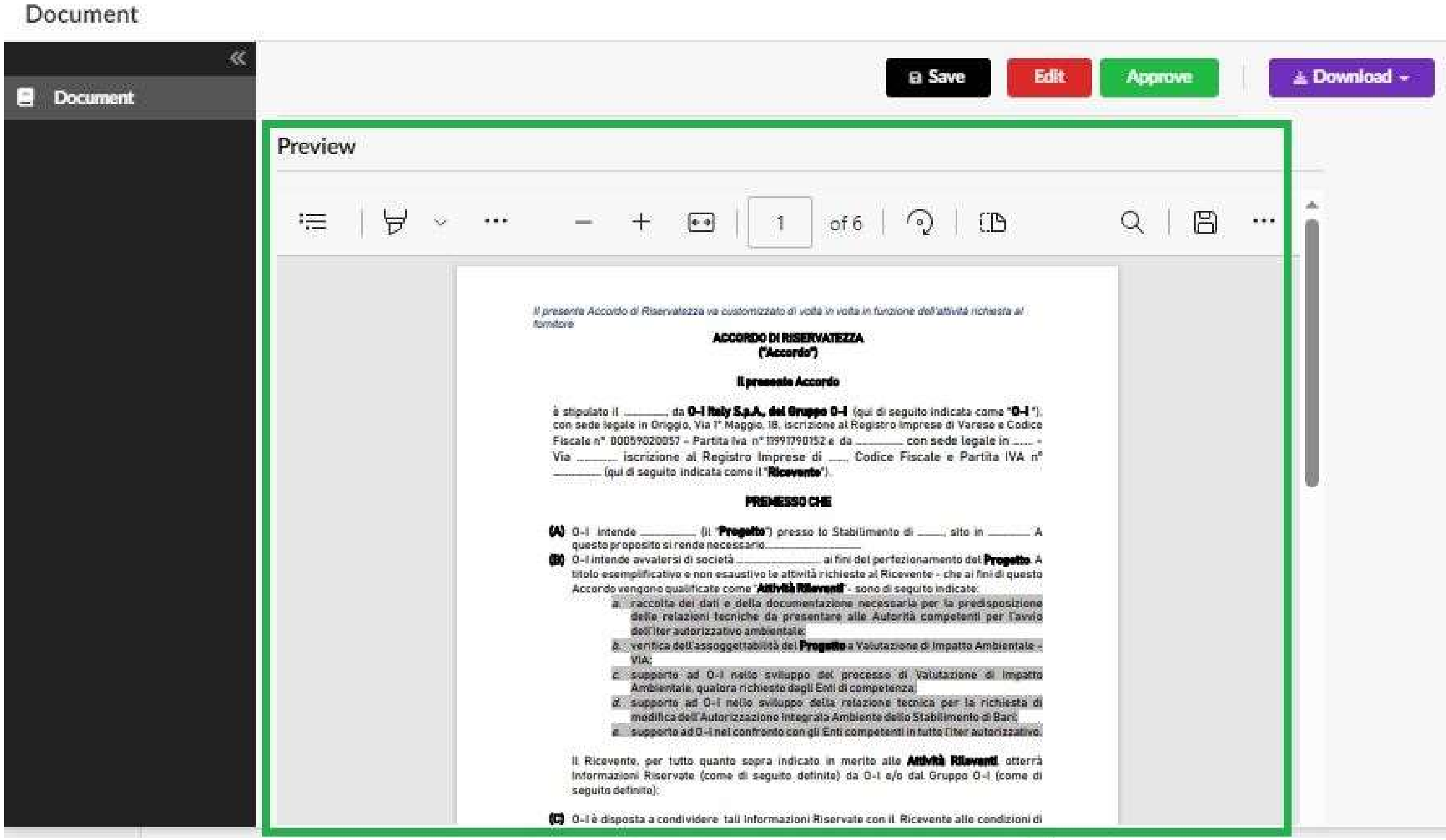
- **DOWNLOAD** document you received,
- **APPROVE** agreement if no changes required,
- or propose changes via **EDIT**.

Main document information and indication to which **CONTRACT WORKSPACE** document is linked to is visible:



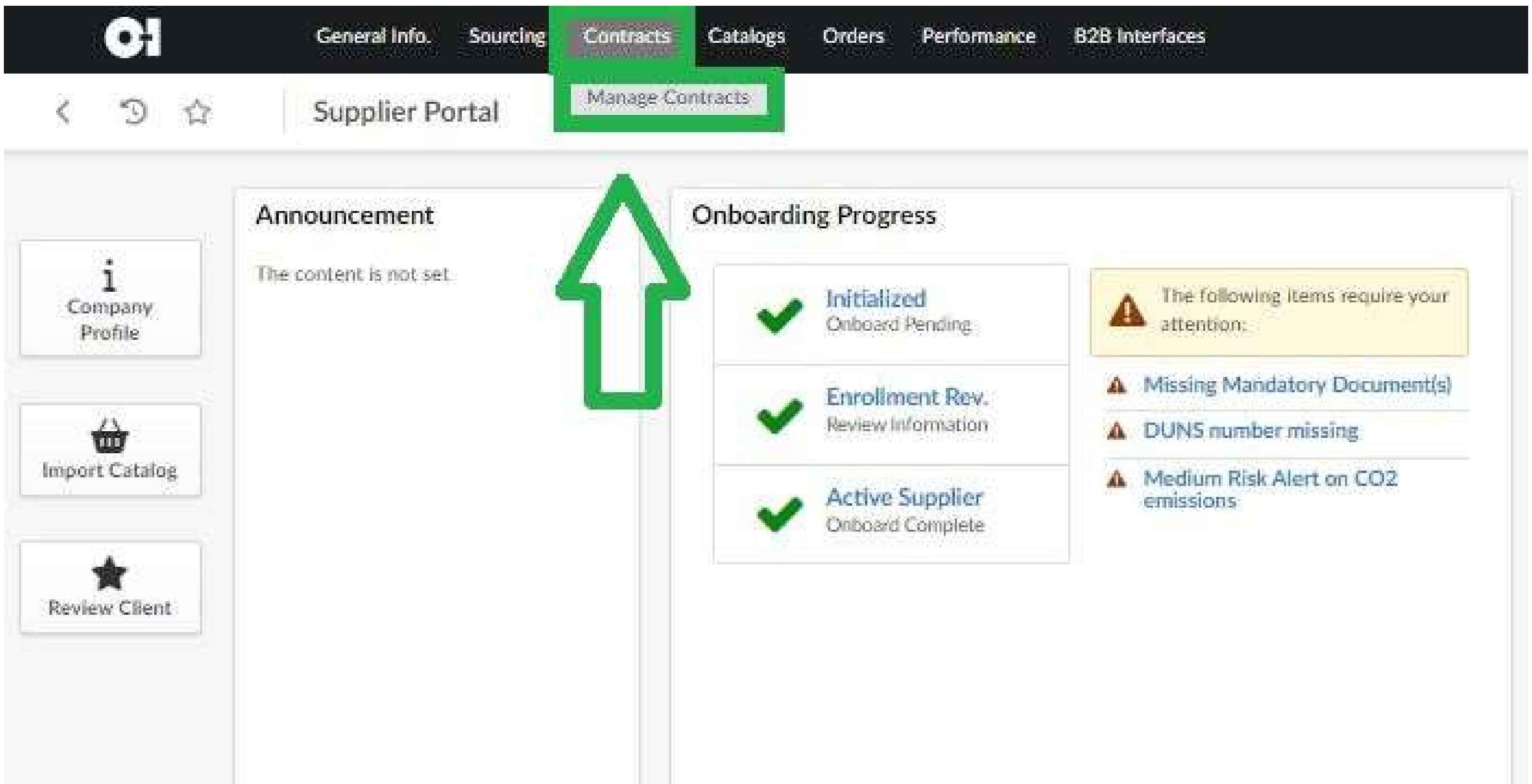
Contract management – Agreement Document

To view agreement document (original version proposed by O-I), use preview window:



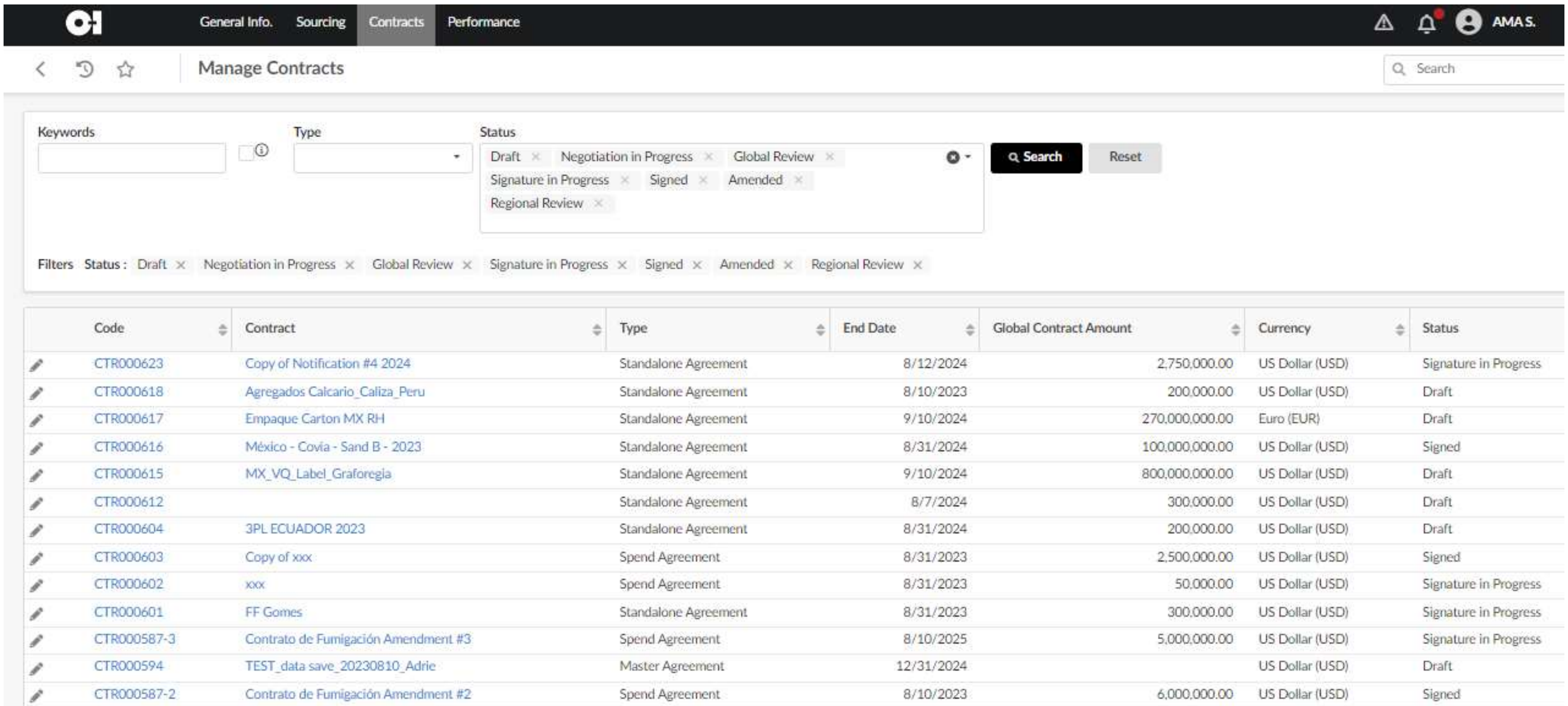
Contracts -> Manage Contracts

To browse through contract workspaces, you have with O-I, use menu: **CONTRACTS** & **MANAGE CONTRACTS**:



Contracts -> Manage Contracts

CONTRACT WORKSPACES (CTRXXXXXX, where X stands for a digit) will be shown in a fallowing view – click into an item to display details:

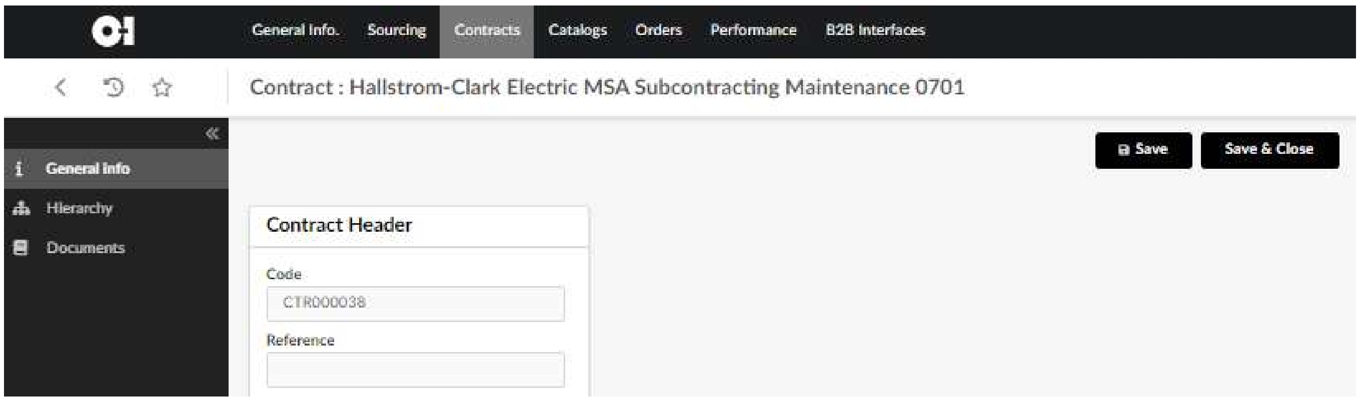


Code	Contract	Type	End Date	Global Contract Amount	Currency	Status
CTR000623	Copy of Notification #4 2024	Standalone Agreement	8/12/2024	2,750,000.00	US Dollar (USD)	Signature in Progress
CTR000618	Agregados Calcario_Caliza_Peru	Standalone Agreement	8/10/2023	200,000.00	US Dollar (USD)	Draft
CTR000617	Empaque Carton MX RH	Standalone Agreement	9/10/2024	270,000,000.00	Euro (EUR)	Draft
CTR000616	México - Covia - Sand B - 2023	Standalone Agreement	8/31/2024	100,000,000.00	US Dollar (USD)	Signed
CTR000615	MX_VQ_Label_Graforegia	Standalone Agreement	9/10/2024	800,000,000.00	US Dollar (USD)	Draft
CTR000612		Standalone Agreement	8/7/2024	300,000.00	US Dollar (USD)	Draft
CTR000604	3PL ECUADOR 2023	Standalone Agreement	8/31/2024	200,000.00	US Dollar (USD)	Draft
CTR000603	Copy of xxx	Spend Agreement	8/31/2023	2,500,000.00	US Dollar (USD)	Signed
CTR000602	xxx	Spend Agreement	8/31/2023	50,000.00	US Dollar (USD)	Signature in Progress
CTR000601	FF Gomes	Standalone Agreement	8/31/2023	300,000.00	US Dollar (USD)	Signature in Progress
CTR000587-3	Contrato de Fumigación Amendment #3	Spend Agreement	8/10/2025	5,000,000.00	US Dollar (USD)	Signature in Progress
CTR000594	TEST_data save_20230810_Adrie	Master Agreement	12/31/2024		US Dollar (USD)	Draft
CTR000587-2	Contrato de Fumigación Amendment #2	Spend Agreement	8/10/2023	6,000,000.00	US Dollar (USD)	Signed

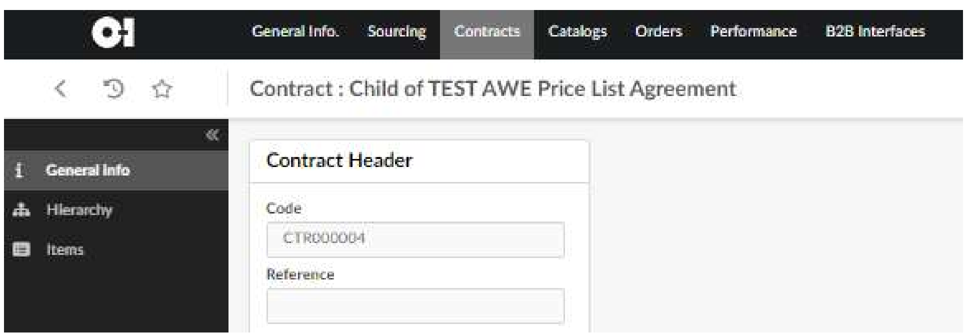
Module Overview - Tabs

The following tabs are available under any contract workspace and for use in the module depending on the contract type: **General Info**, **Hierarchy**, **Documents** / **Items.**

Example – Master Agreement (tabs visible are: General Info, Hierarchy, Documents):

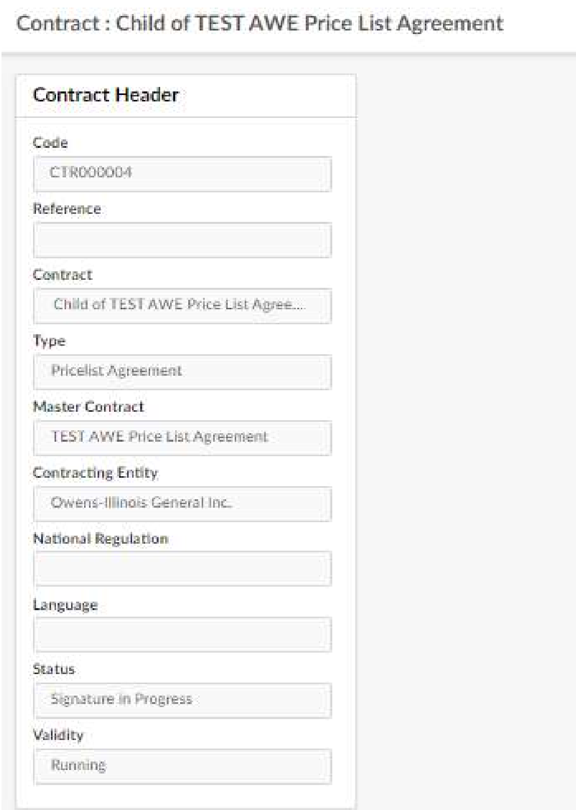


Example – Pricelist Agreement (tabs visible are: General Info, Hierarchy, Items):



Contract workspace – General Info tab

The **General Info** tab lists all main contract attributes – it is not editable for Suppliers:

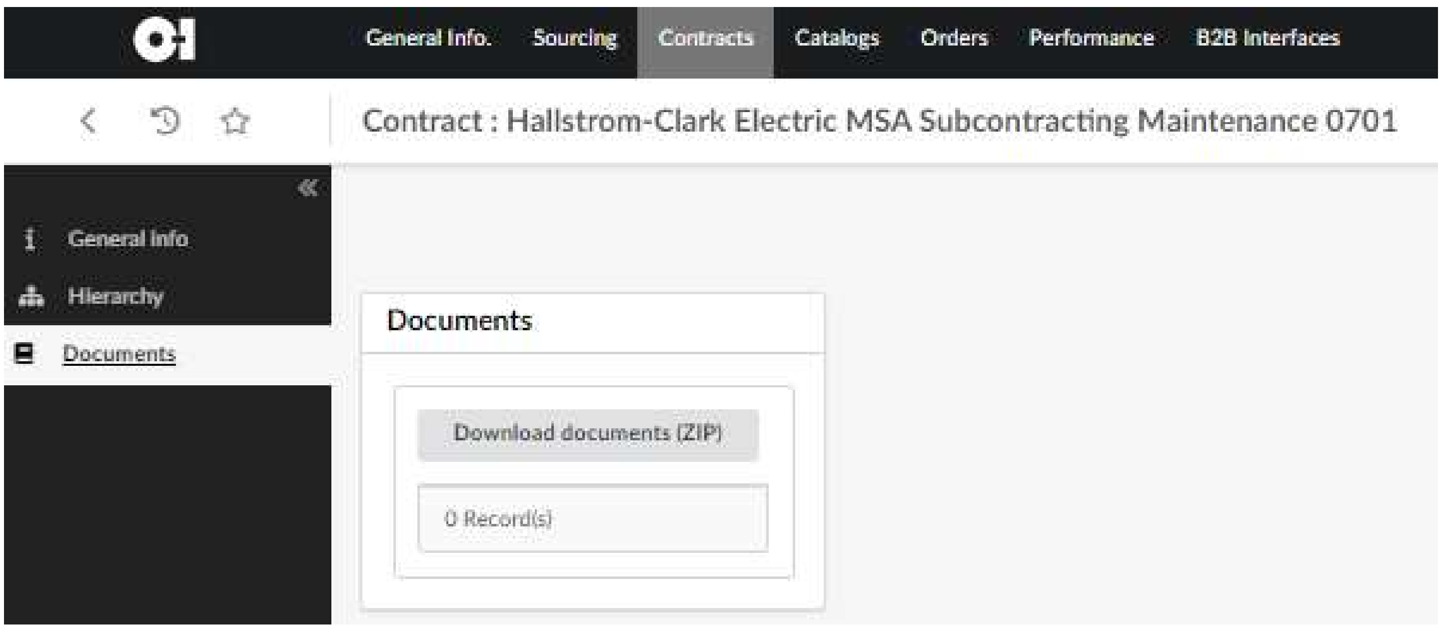


Contract workspace – Hierarchy tab

The **Hierarchy** tab displays the linkage between contracts (if applicable):

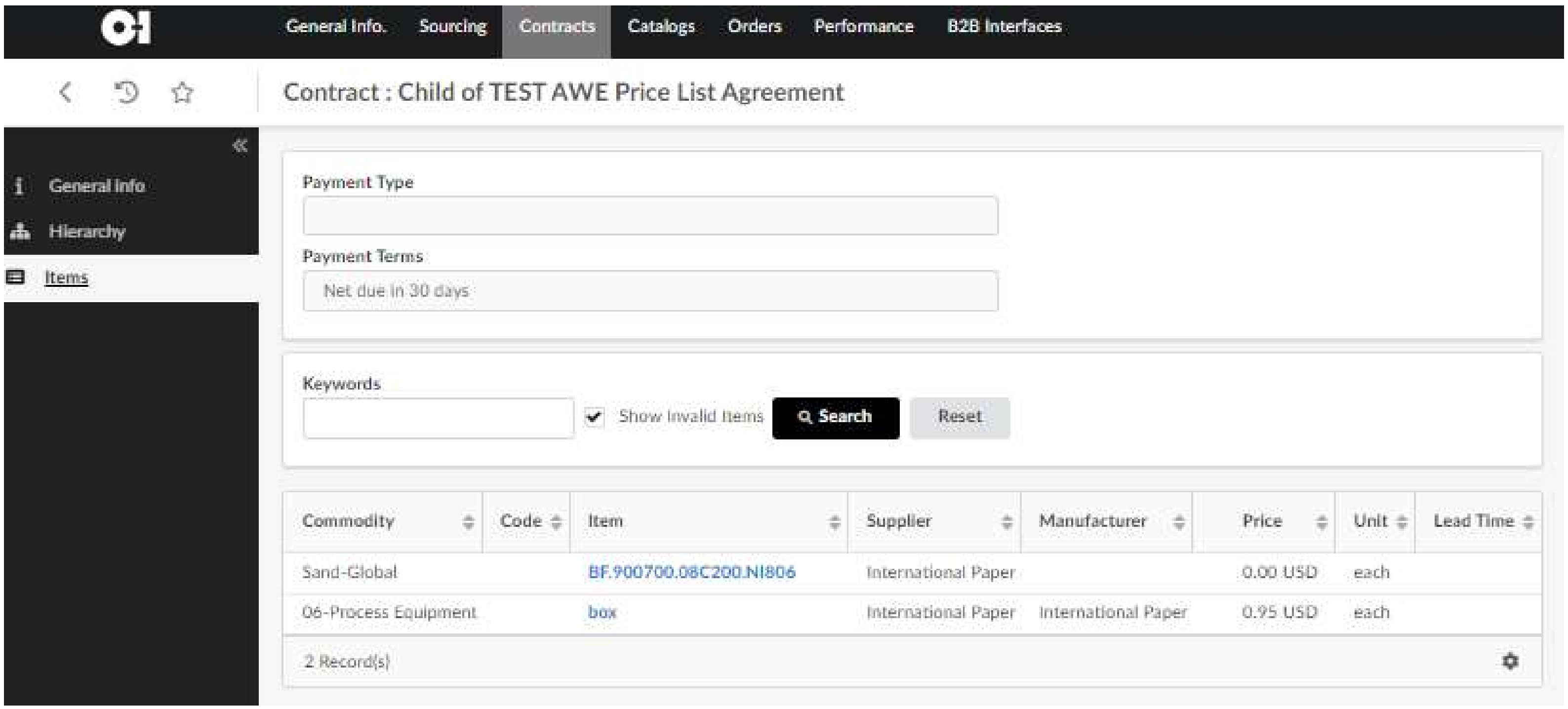
Contract workspace - Documents tab

The **Documents** tab lists all documents associated with the Contract – below no documents are visible as none assigned with CW, although this is where documents will show up once submitted by O-I. If more that one you can download as ZIP folder:



Contract workspace - Items tab

The **Items** tab lists all Items associated to Price List Agreement type:



Adobe eSignature

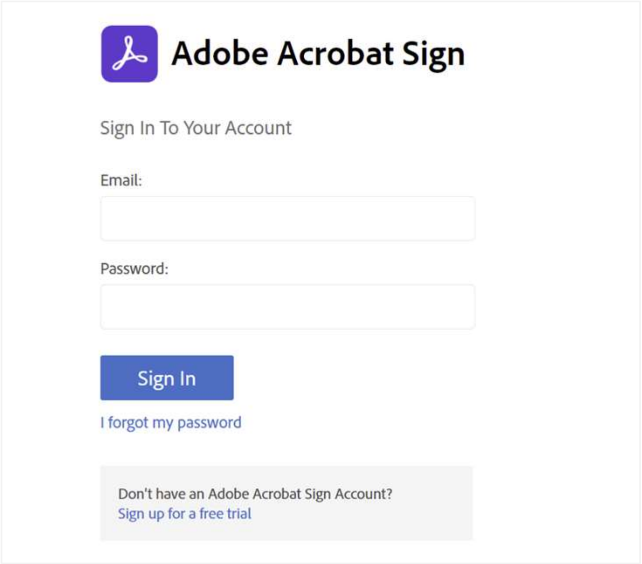
A O-I user may wish to apply an **electronic signature** to an agreement.

O-I users can select the documents requiring signature by checking the corresponding box, then they may click "Activate e-Signatures" to initiate the signing ceremony process.

You will be notified via e-mail when request for e-signature is triggered by O-I:

Adobe eSignature

Once the e-Signature process is initiated for a document, you will be directed to log-in to **Adobe Acrobat Sign** where the Supplier signatory will be assigned by O-I and where on the document will require initial or signature:



Finally, once both parties sign the document the date of the signature is transmitted to Ivalua, document is available for download as well as marked with a status "**finalized**".

INCIDENT MANAGEMENT & COLLABORATION PLANS

NAVIGATION

List of all open activities is available in VALIDATIONS (1)

- ❑ INCIDENT MANAGEMENT (**2**) – gives ability to report issues arising within the relationship with the Supplier.
- ❑ COLLABORATION PLAN (3) - gives opportunities to work together with Suppliers and internal stakeholders (functions like engineering, quality, logistics) to:
  - address incidents – corrective action plan
  - improve performance – improvement plan
  - control supplier risks – mitigation plan
  - collaborate on innovations – innovation plan
  - work towards new product development – new product Introduction

To open specific incident or collaboration plan –pencil (**4**) should be used. Details will be found in opened window with possibility to fill specific data.

Validations 1 See 11 results

	Process	Object	Action	Due date
2	Incident Management	test 27.07.2023	Supplier Review	
4	Incident Management	Edit incident SQP	Supplier Review	
	Incident Management	ex	Supplier Review	
3	Collaboration Plan	example	Plan Submission	

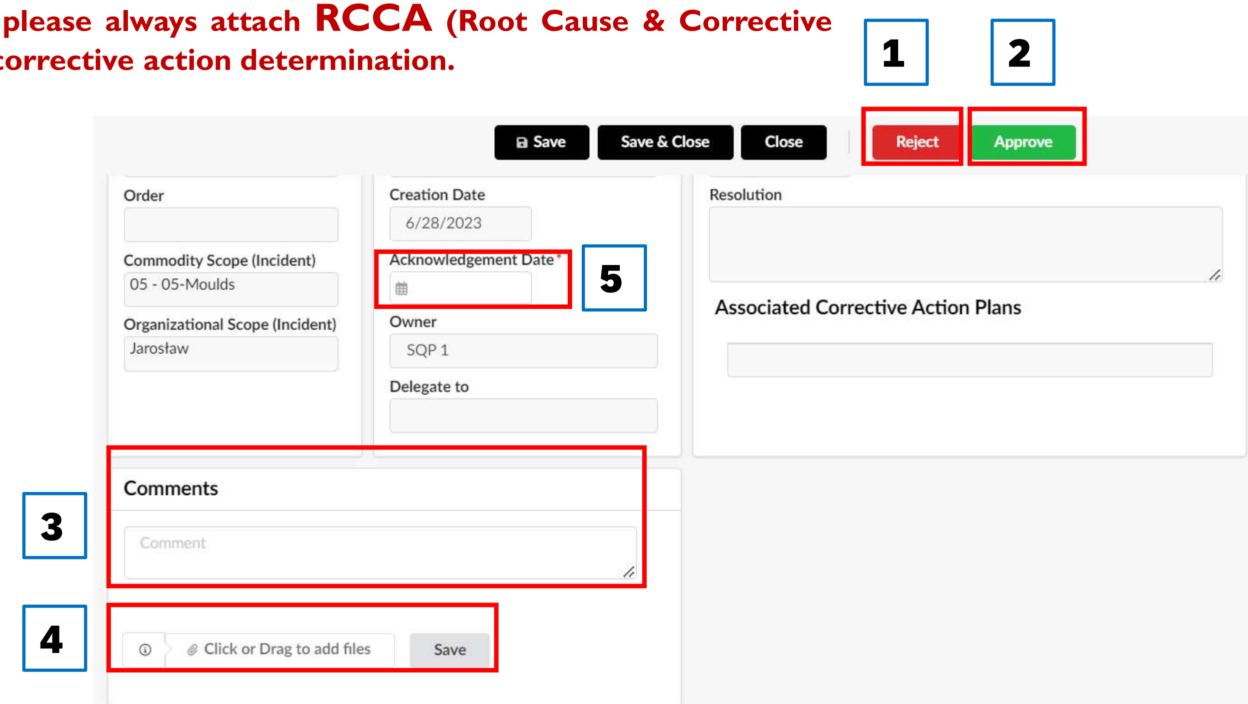
INCIDENT MANAGEMENT

Once as Supplier you will review incident details you should make decision to the incident:

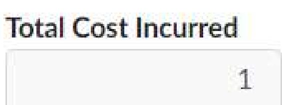
- **Reject** (1) – if you do not agree with incident. In case of rejected incident Supplier Quality Manager will be involved and might come back with some additional information.
- **Approve** (2) – if you agree with incident.

Together with decision please add **comments** with **decision justification** (3) and **attachments** (4).

For incident with severity 3 and severity 4 please always attach RCCA (Root Cause & Corrective Action) report with investigation results and corrective action determination.



If any **costs** will be associated to the incident, you will see amount in „total cost incurred".
Costs might be under calculation, then it will be provided in incident description and updated later.



For incident with costs associated please attach **CREDIT NOTE** as attachment (4).

INCIDENT MANAGEMENT

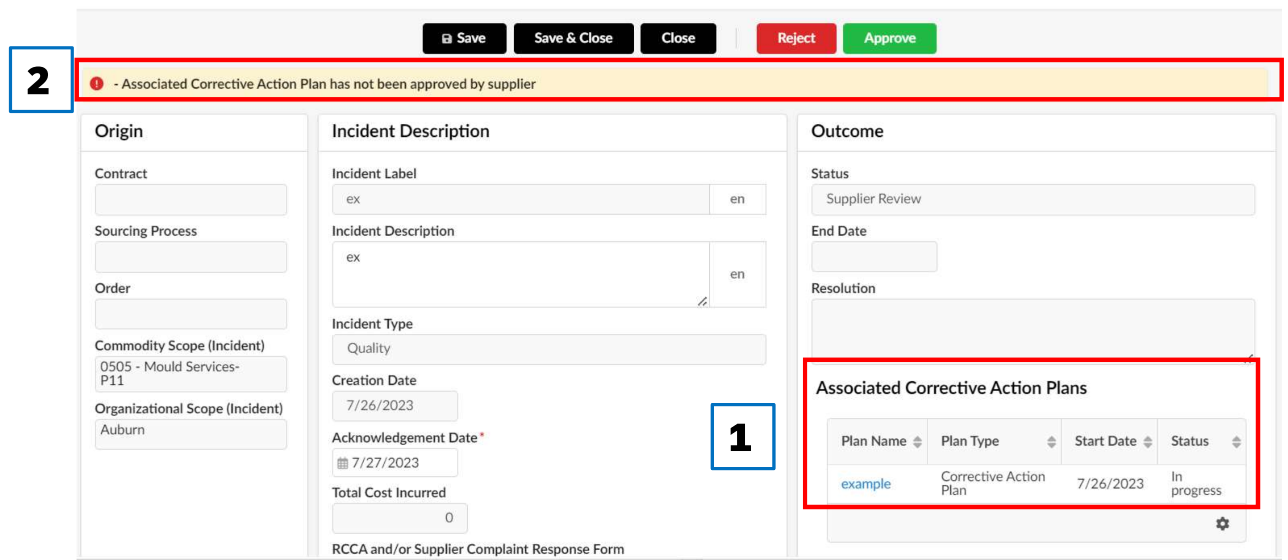
Please respect the following time frame

Acknowledgement date 2 days → **RCCA report 15 days** → **Incident closure**

ASSOCIATED CORRECTIVE ACTION PLAN

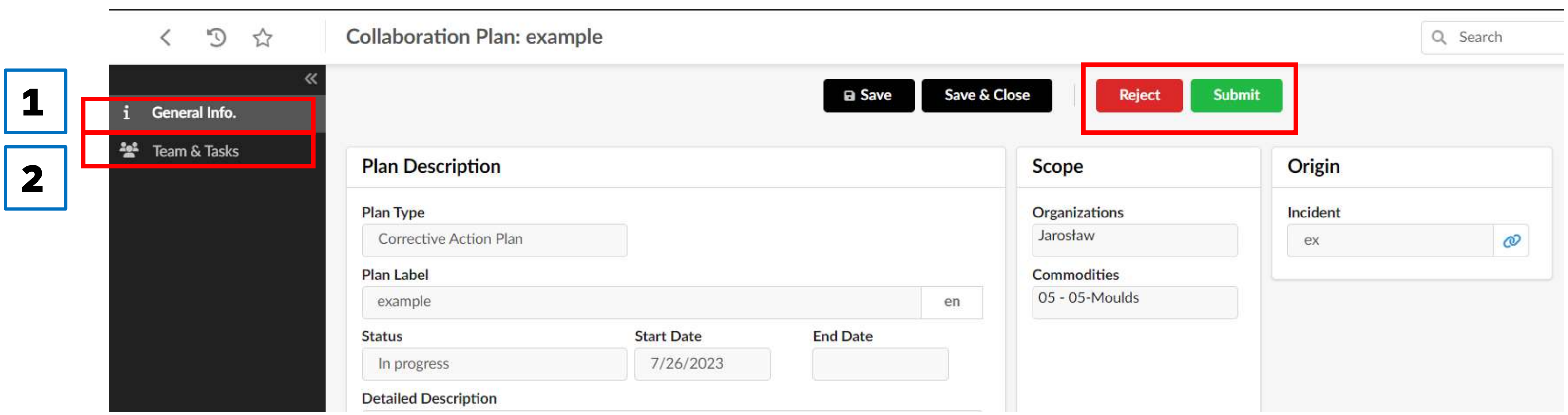
For specific incidents by Supplier Quality Team decision **corrective action plan** might be opened (**1**).

If there will be corrective action plan associated to the incident, then incident can't be closed before corrective action approval. Blocking alert will appear. Corrective action plan should be completed before closing incident (**2**).

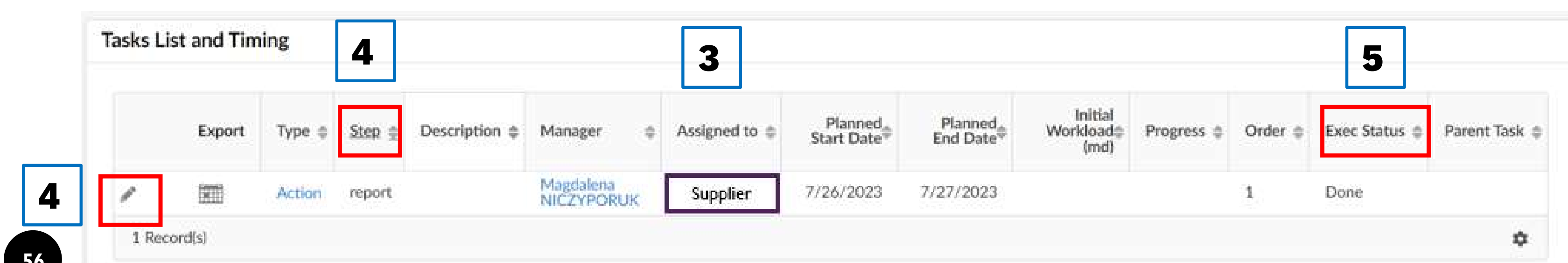


COLLABORATION PLAN

Each type of collaboration plan will have general information with plan details (**1**) and team and task assigned for specific plan (**2**). As Supplier you should make decision to collaboration plan: reject if you disagree or submit if you approve plan. You should update tasks and click „save" once you would like to save introduced changes and notify O-I about updates in plan.

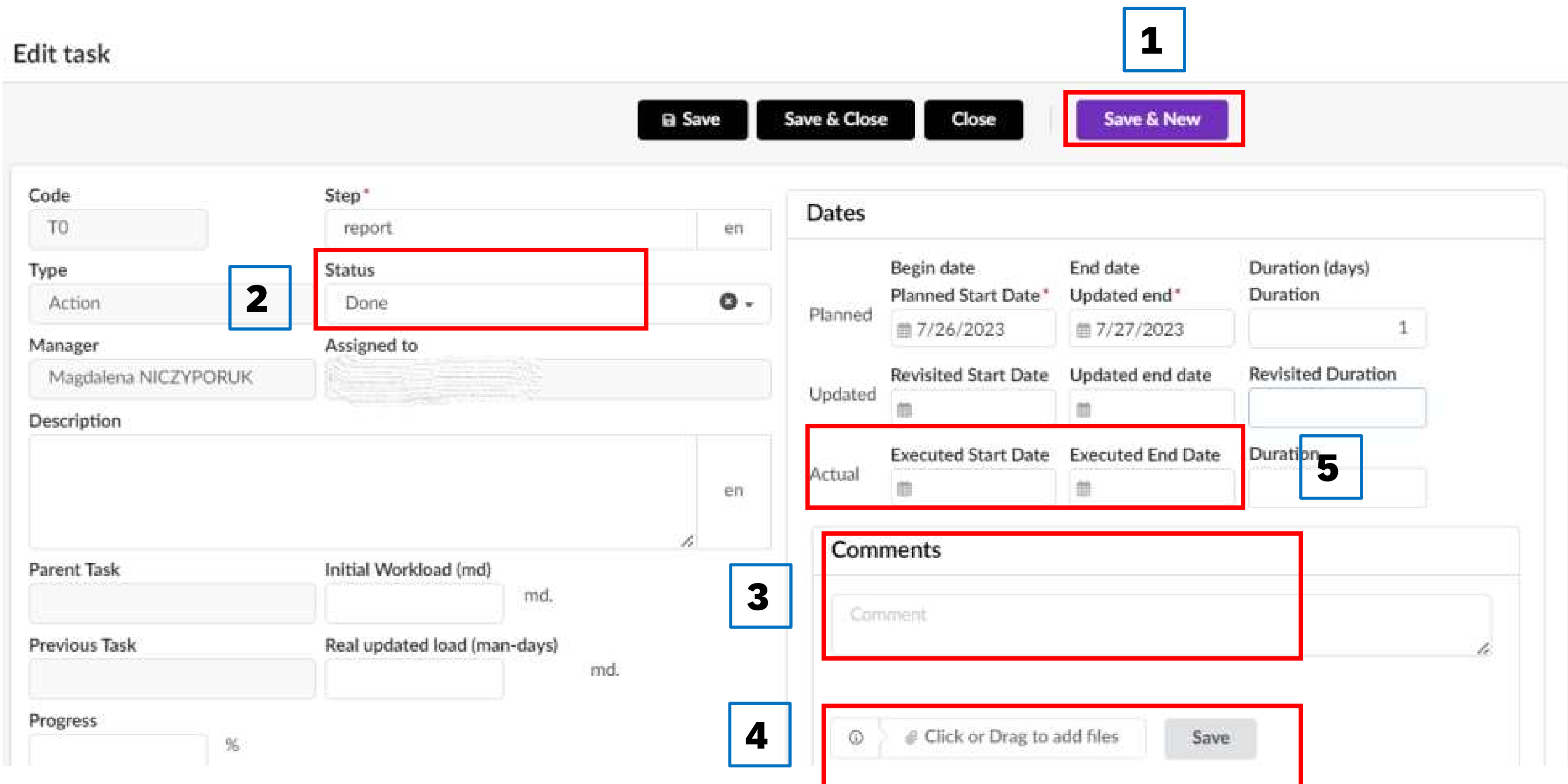


Under team and task tab you will find what task were assigned to you (3) and you can **edit task** by clicking on pencil (4). As Supplier, you should complete required task (4), update status (5), and provide required evidence.



COLLABORATION PLAN

You can add new tasks in edit task window by „**Save & New**” button (**1**). For specific task assigned to you, you should update status of task (**2**), add comments to task (**3**), add attachments if required (**4**) and updated execution dates (**5**).



ECOVADIS INVITATIONS

What is Ecovadis?

Ecovadis is the sustainability ratings company that has been selected by O-I to support our Sustainable Procurement initiatives.

Selected suppliers who are within the scope of O-I project may be approached via Ivalua with an invitation to participate in the program.

Once invited via the Ivalua platform, the evaluation process that ends up with rating is fully managed by the Ecovadis company.

O-I expects the selected suppliers to enroll the project and obtain rating in a timely manner. At this stage, the scoring level is not critical.

For more information on Ecovadis, the assessment process, costs and benefits please go to the Ecovadis homepage ecovadis