Reference guide for suppliers to Aker BP

Step by step guide when collaborating with Aker BP in Ivalua

Ivalua is the new contract management system in Aker BP

Aker BP have selected Ivalua as our new contract management system, with effect from 27th February 2023.

From this date all new tendering- and contract management activities will be conducted through the Ivalua portal.

The Portal is also used for supplier management, and you can maintain relevant information and contact persons for your organization.

You will be given access to the portal when it is required, i.e when you are invited to a new sourcing event or changes are made to an existing contract.

If you need any more information, please contact your SCM Specialist or read more in this training material.

Table of contents

1. General – navigation & homepage

How to access Ivalua

General – navigation & homepage

Option 1   I received a login & password via email to login into Ivalua.

Click here to go to the login page:
Login: akerbp_(ivalua.app)

Option 2   I received an invite to self-register.

Please continue with self-registration

Option 3   I have received no credentials or invite email yet.

Please contact businesspartner@akerbp.com

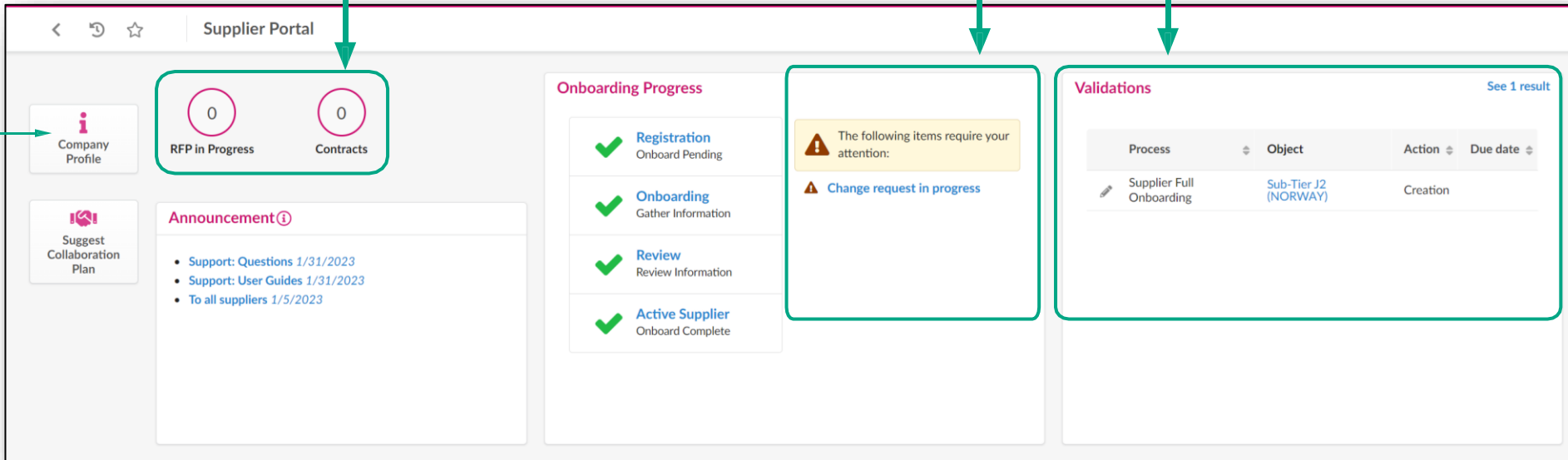# Homepage & navigation controls

General – navigation & homepage

Once you are logged in, you get redirected to the Ivalua homepage, called the 'Supplier Portal'.
This is the starting point for all your activities as a supplier to Aker BP.

Quick access to your request for proposals (RFPs) and contracts with Aker BP.

Tasks that require your attention will appear here.

Shortcut to your company's profile.

2. Registration

How to register and become a supplier to Aker BP

1. Self registration form (optional)

Registration

Note: *Below steps only need to be followed if you were invited to self-register via a url. If not, you can continue to the next slide.*

1 Access the Supplier Portal using the link provided by Aker BP. A registration form should appear. Fill out the form. Mandatory fields are marked with a red star.

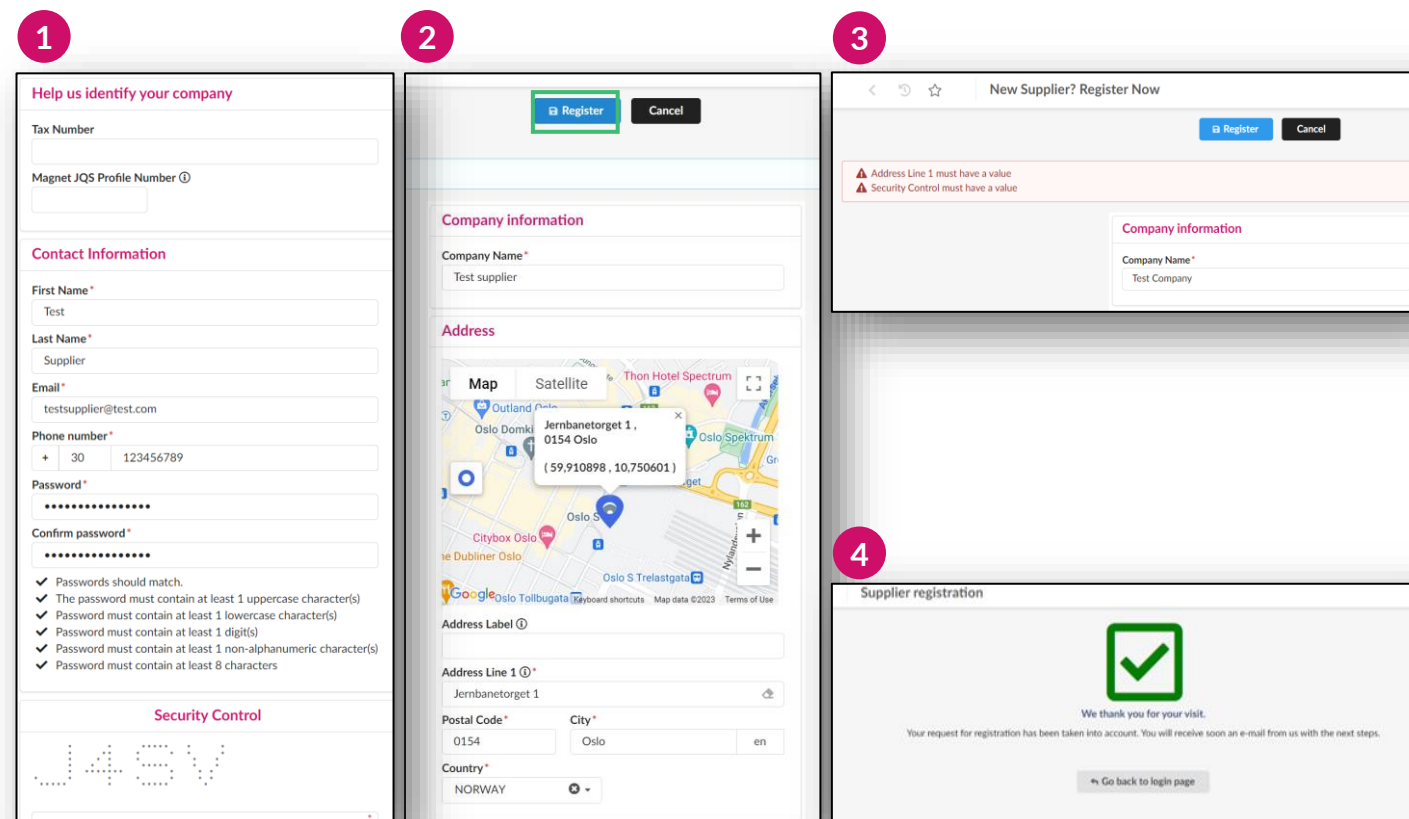Furthermore, the security control code must be entered.

2 Submit the registration by clicking the **Register** button at the top of the screen.

3 If a mandatory field is missing, red warnings will appear at the top of the form. Edit necessary fields and submit again.

4 After registration, the screen should refresh and display a page with a confirmation message. Aker BP will now validate your registration, you can login to monitor the progress.

Note: *Take note of the registered email and password, as these will be used as login credentials.*

Note: *For Norwegian suppliers, Aker BP will ensure the name and address information is correct by importing and synching it with Brønnøysund information*

2. Follow up on your registratrion status

Registration

1 Log into the Ivalua platform using credentials (email & password used while registering or as shared by Aker BP). The Supplier Portal home page will open.

2 In the section '**Onboarding Progress**', you can see the status of your registration as an Aker BP supplier. If there are actions required from your side, this will be displayed here, with hyperlinks.

Note: Aker BP will also inform you about these steps by email.
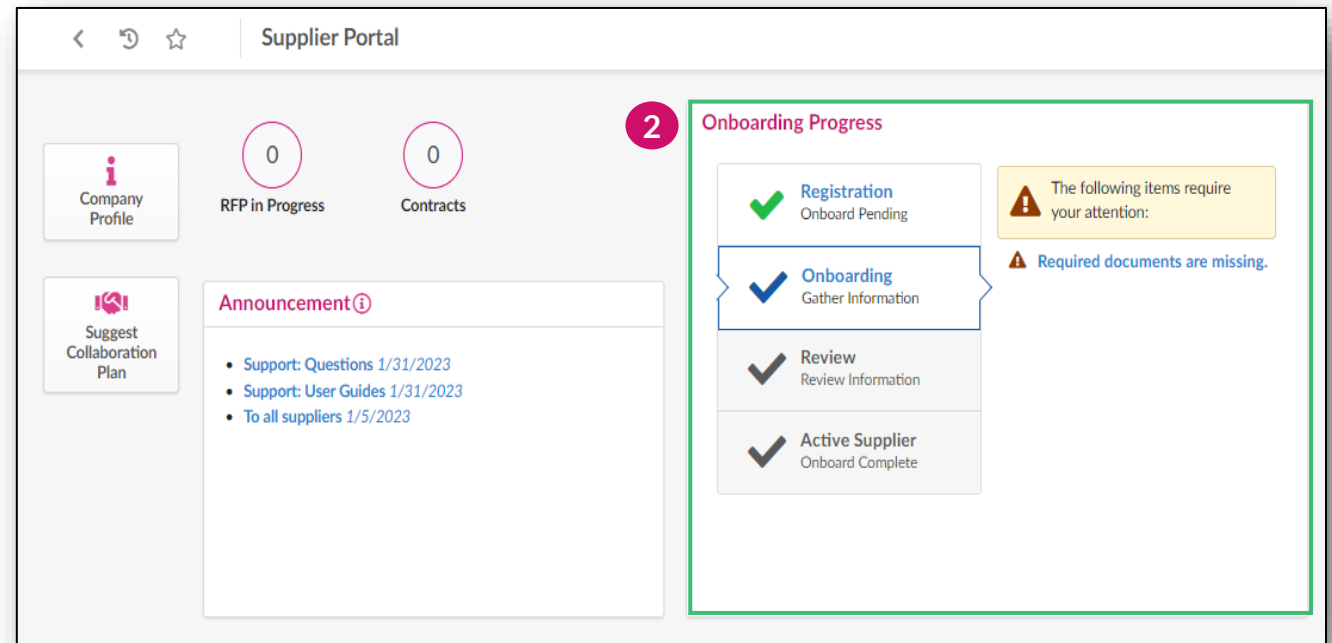
3. Complete the registration process

Registration

Note: Follow the below steps once Aker BP invited you via email to finish the onboarding process.
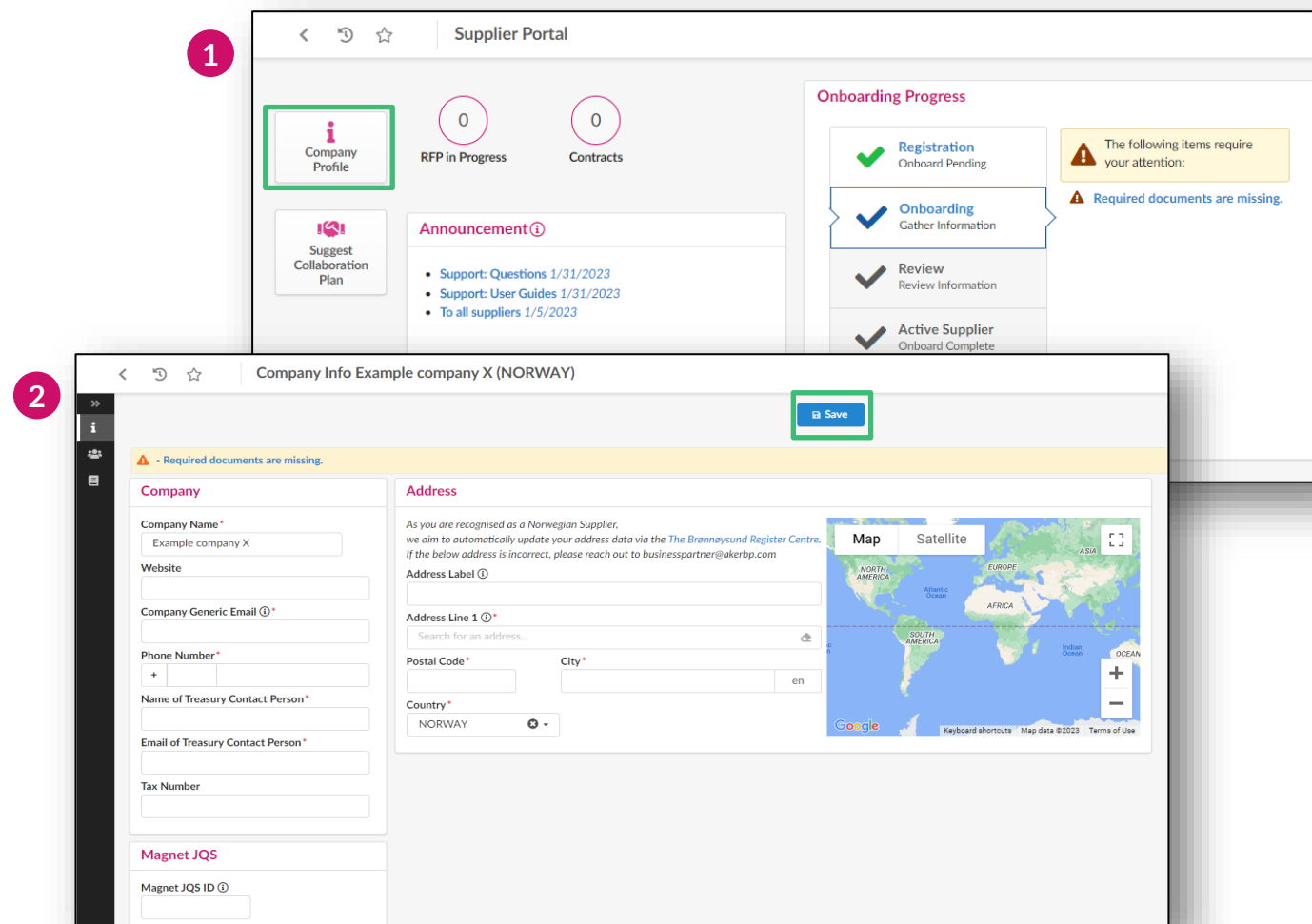
Information check & update

1 Click on the button '**Company Profile**'.

*Note: You'll be taken to the **Company Information** tab where you can fill out, check and update all information fields.*
Mandatory fields are marked with an Asterix(*).

2 Once complete, click **Save.**

*Note: For Norwegian suppliers, Aker BP will ensure the name and address information is correct by importing and synching it with **Brønnøysund** information.*

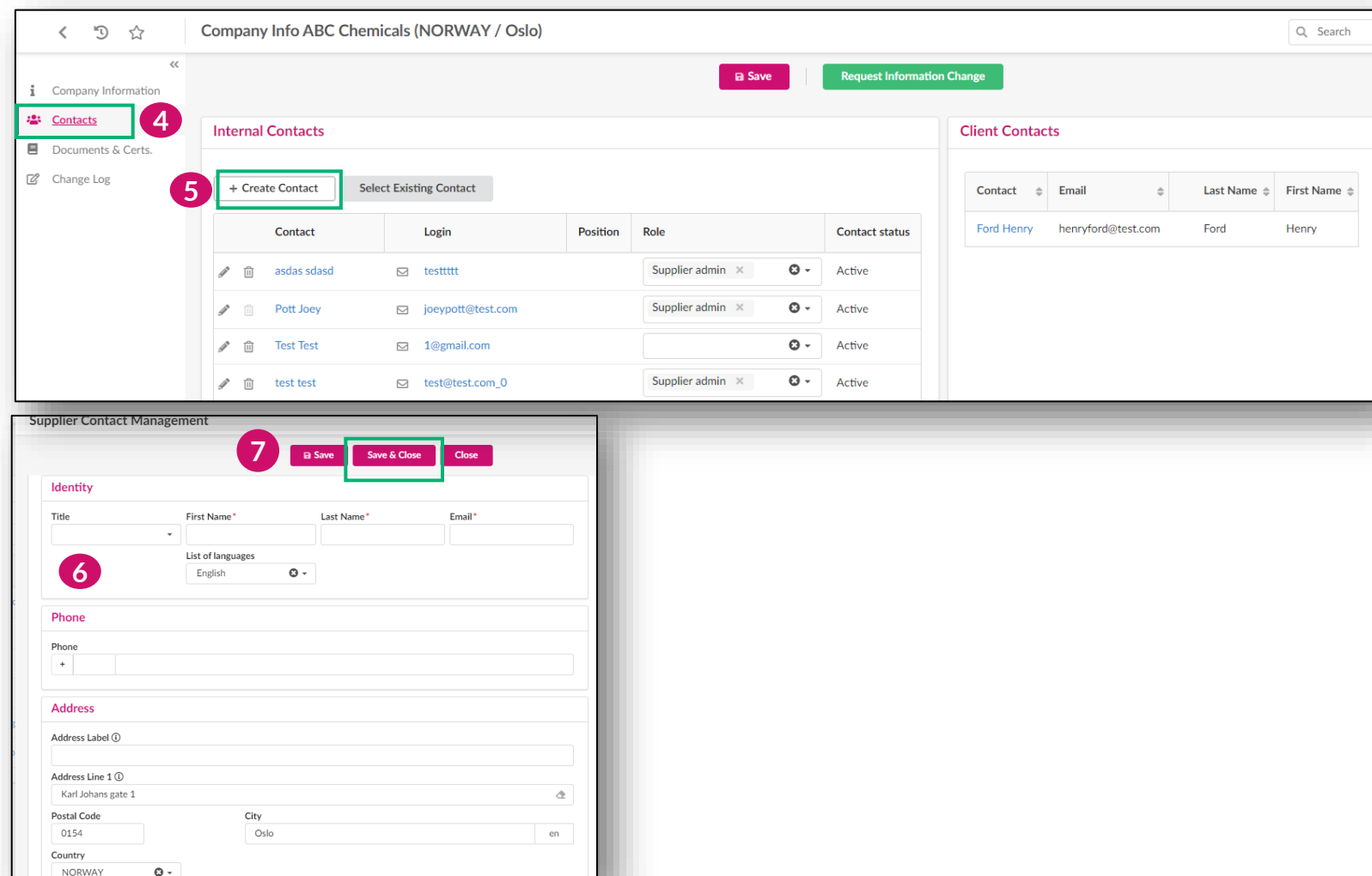# 3. Complete the registration process

Registration

Manage Team

4 Navigate to the Contacts tab in the sidebar. Here you can add and edit your colleagues as co-coworkers who should have access to Aker BP information.

5 Click **Create Contact** to add a new member. A popup window with a registration form will open.

6 Fill out the form. Mandatory fields are marked with a red star.

7 Once complete, click **Save & Close.**

3. Complete the registration process

Registration

Manage Team

8 Once a contact is created, you can enter their role in the **role** field. Start typing or use the dropdown menu.

Note: It's mandatory that at least one of the contacts has the "**Supplier admin**" role.

9 Click the **Save** button.

10 If there was the alert "No contact with the role 'Supplier admin'", it should now disappear.
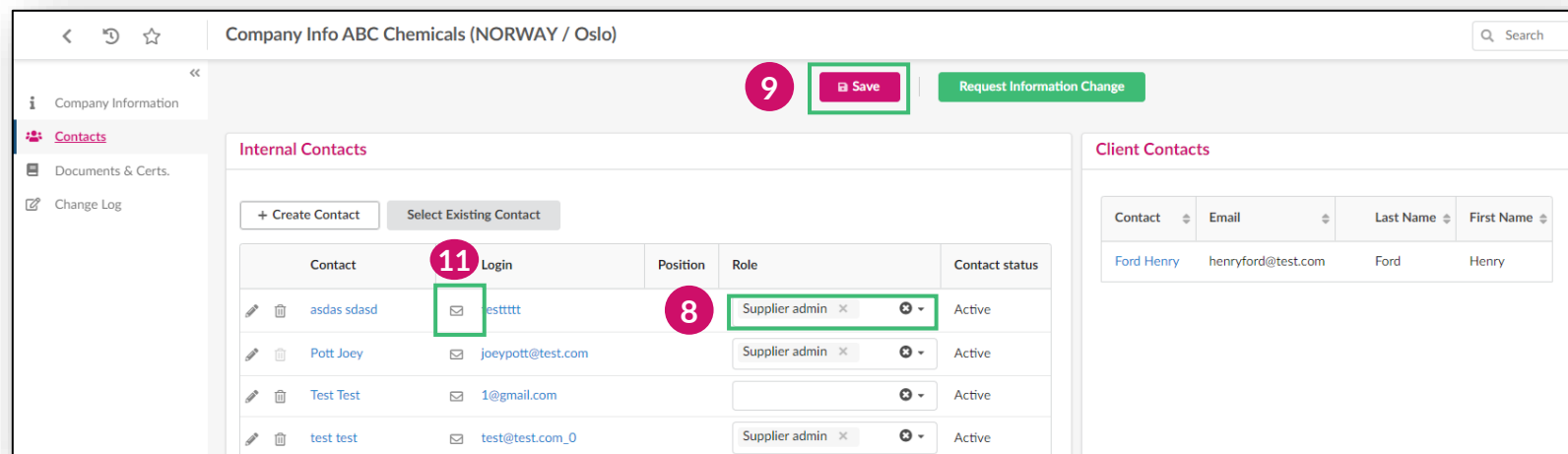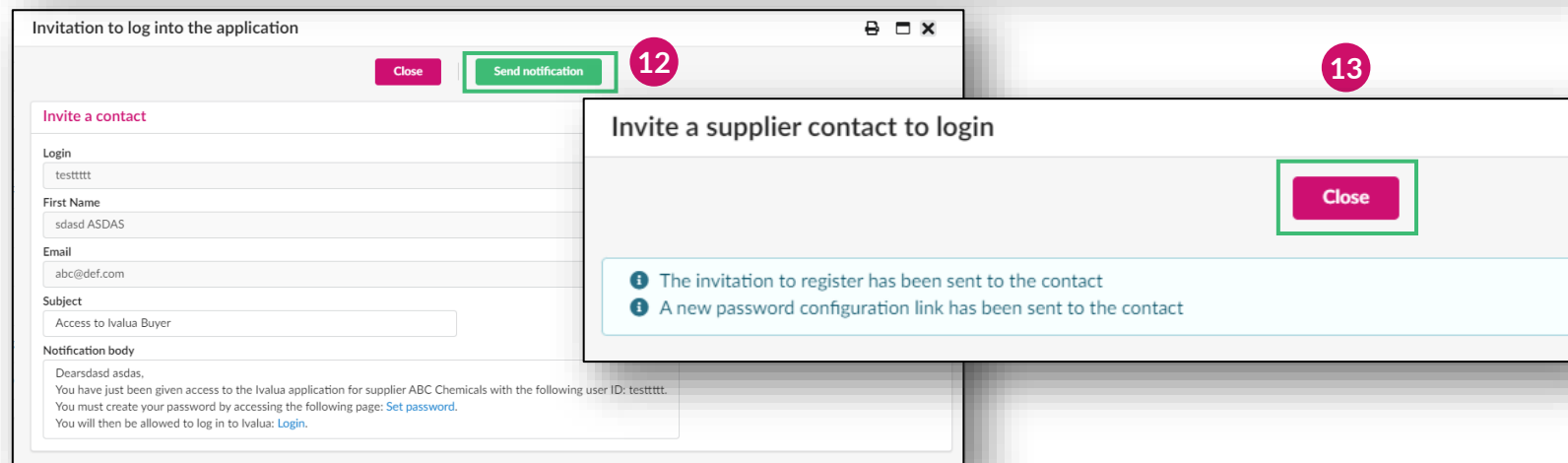
11 Click on the **envelope** icon. An email draft with a login invitation will open.

12 Click the **Send notification** button to send the request to the contact email address.

13 Click the **Close** button. An email with the invitation to login to the Ivalua application must have been received in the recipient's mailbox.

3. Complete the registration process

Registration

Manage Documents

The documents and certifications tab allows you to share documents with Aker BP during the registration process. In some cases, Aker BP will require you to upload some mandatory documents, e.g. the signed version of a supplier declaration.

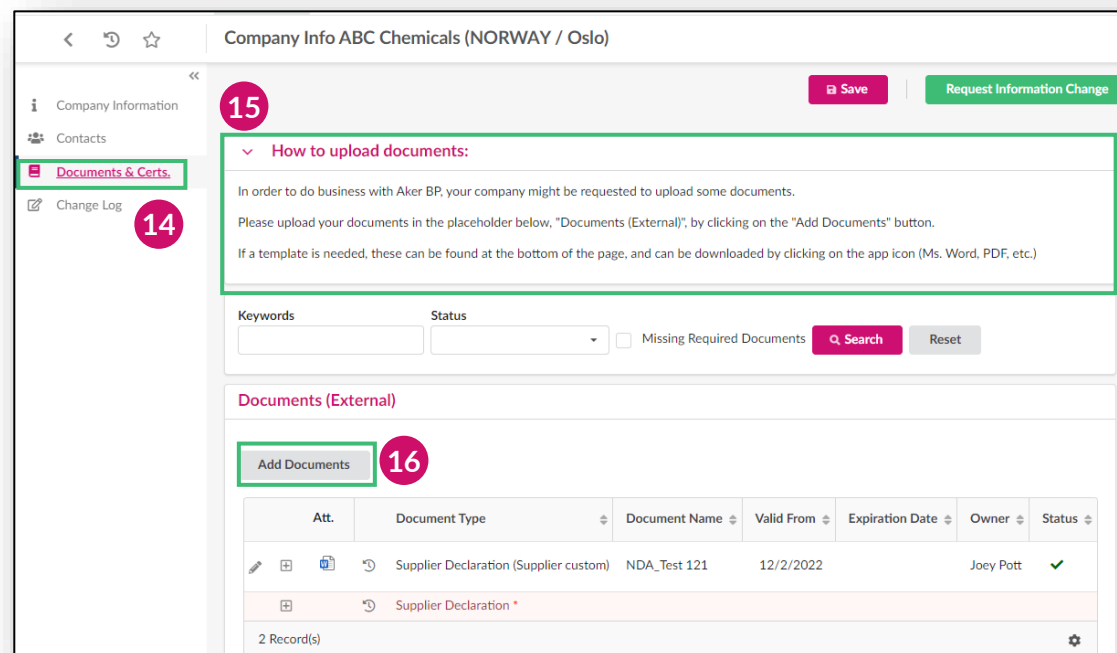**14** Go to the **Documents & Certs.** tab in the sidebar.

15 '**How to upload documents**' describes how to proceed.

16 Add documents and certifications by clicking the button "**Add Documents**". For each button, a popup window will open.

17 If you need a **template**, click on the icon in the documentation table under **template** placeholder.

18 Fill out the form and upload the corresponding document file. Mandatory fields are marked with a red star.

19 Once complete, click the **Save & Close** button. The document should be uploaded successfully.

3. Complete the registration process

Registration

Send Data for Review

20 Once all the information has been filled in, click on **Data Completed.** The information is now sent to Aker BP for review.
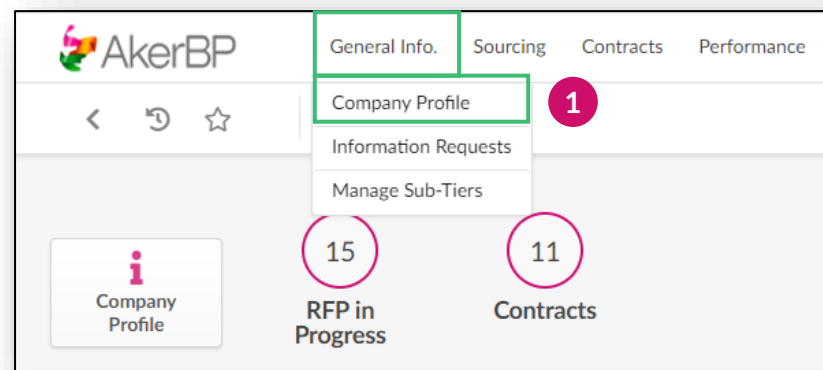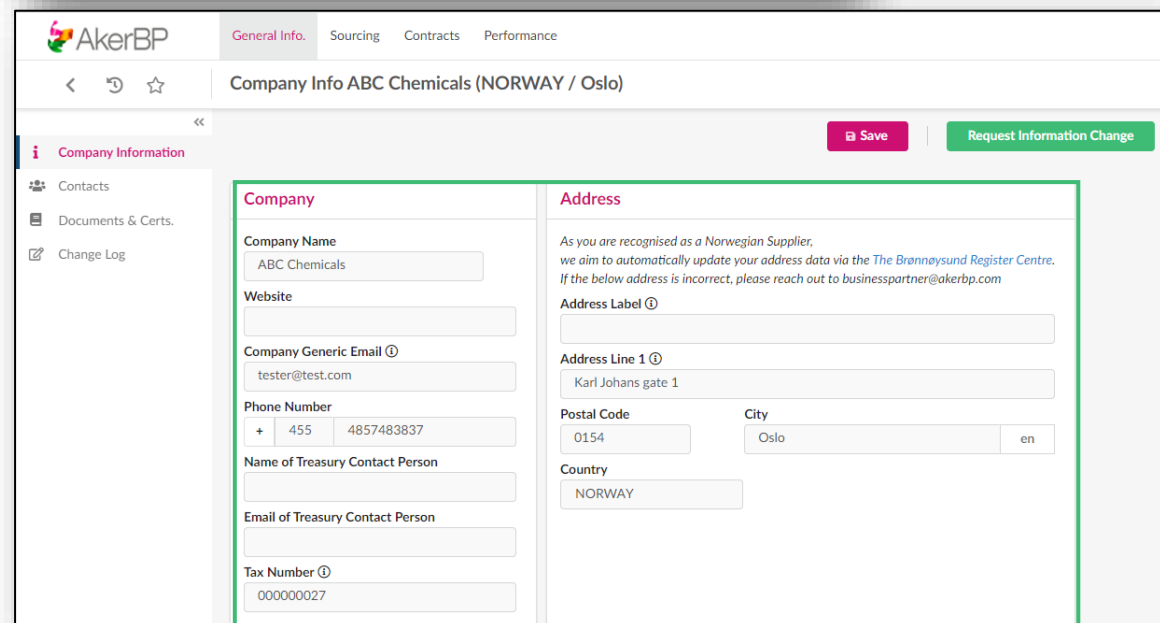
3. General administration

Taking ownership of the data as a supplier to Aker BP

1. Available company information

General administration

Note: You can view all your information here. Once you are an active supplier in the system, all information becomes read-only. If it becomes necessary to change information a change request must be initiated. Note that contacts, documents and certifications are editable, and not subject to change requests.

1   Go to General Info > Company Profile

2. Create a change request
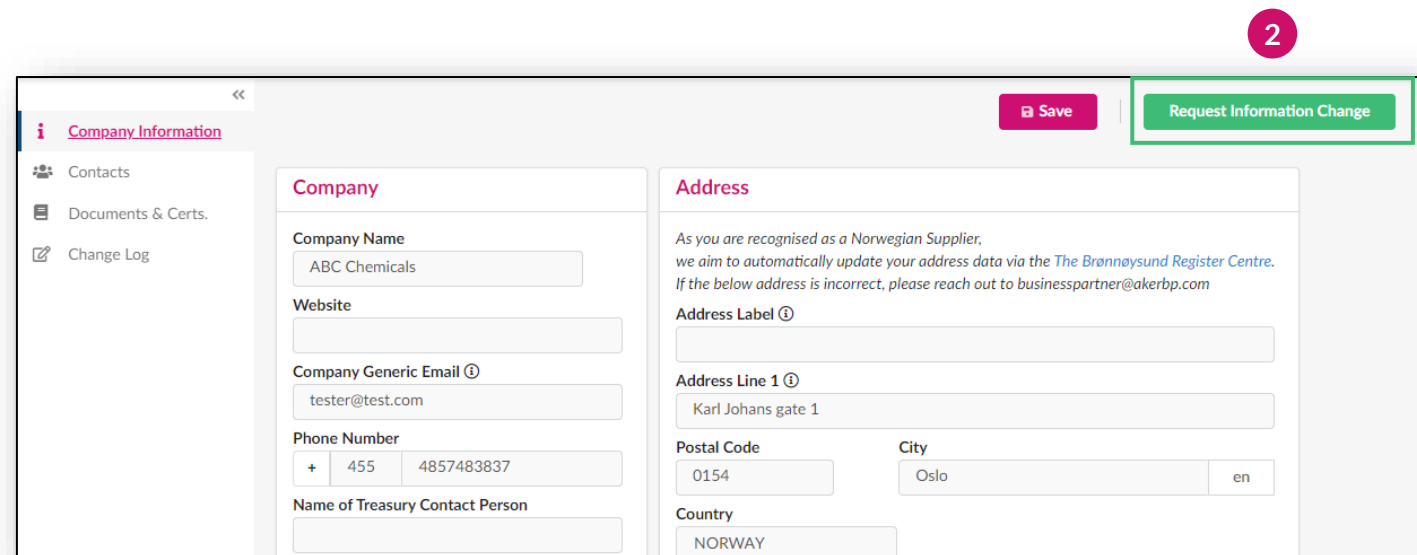
General administration

Supplier request information change

2   Click on the **Request Information Change** button.

Note: Before clicking the Request Information Change button, all information fields are read-only. This is why you must submit a change request to edit your information.

Note: *Supplier contacts and documents can always be edited without creating a change request.*

Note: *If you are a Norwegian supplier, Aker BP aims to automatically update your address via The **Brønnøysund** Register Centre. If the address is still incorrect, please reach out to businesspartner@akerbp.com*

2. Create a change request

General administration
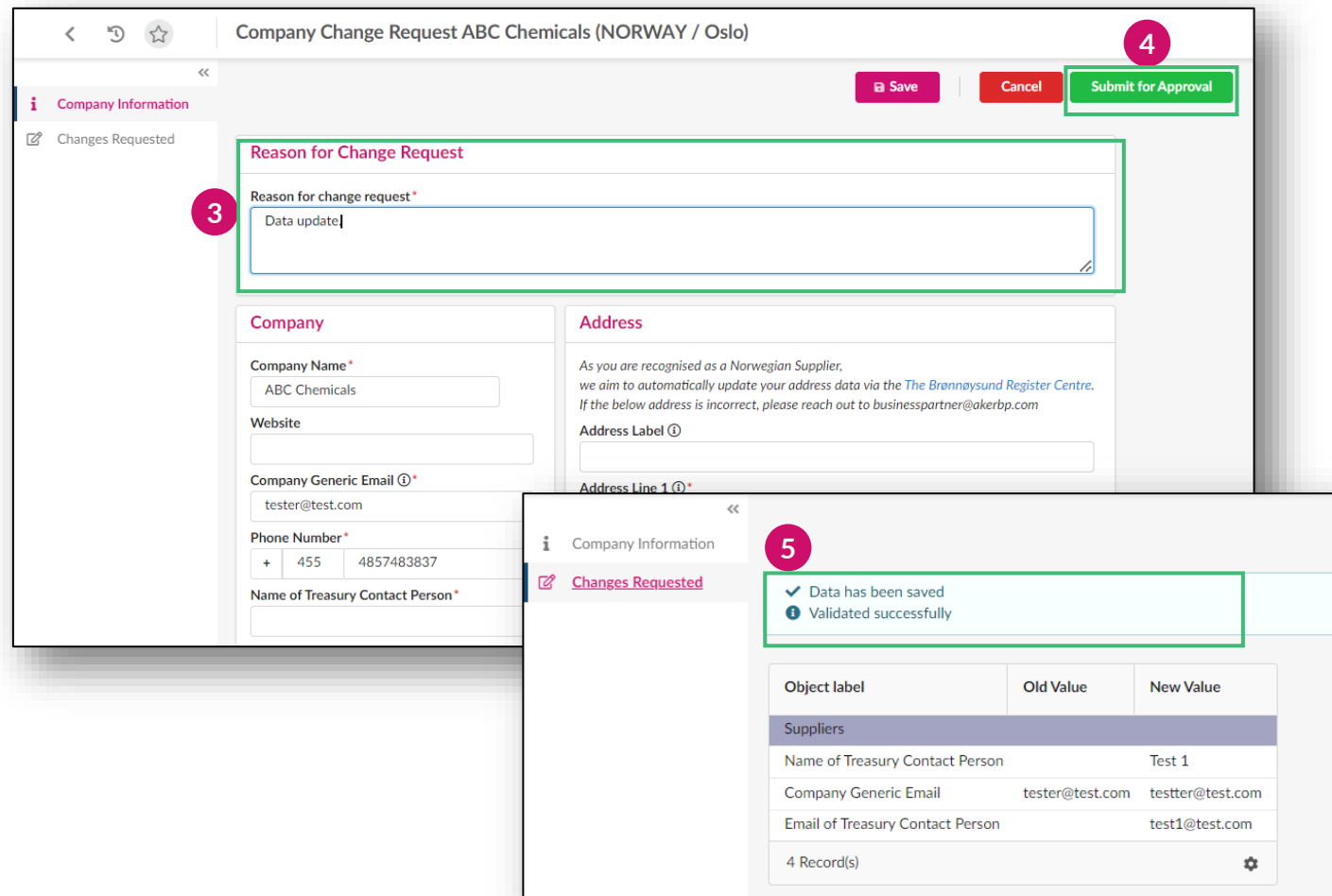
Supplier request information change

The supplier record fields are now editable and submit and cancel buttons appear.

Note: Reason for change request is a mandatory field.

3 Update the information.

4 Click on the **Submit for Approval** button.

5 Upon successful submission, a confirmation message will appear. The company information page becomes read-only, and all buttons disappear.

Note: You can only have one ongoing change request. Hence, the button will not re-appear before the request has been handled.

*Note: If you are a Norwegian supplier, Aker BP aims to automatically update your address via The **Brønnøysund** Register Centre. If the address is still incorrect, please reach out to businesspartner@akerbp.com*
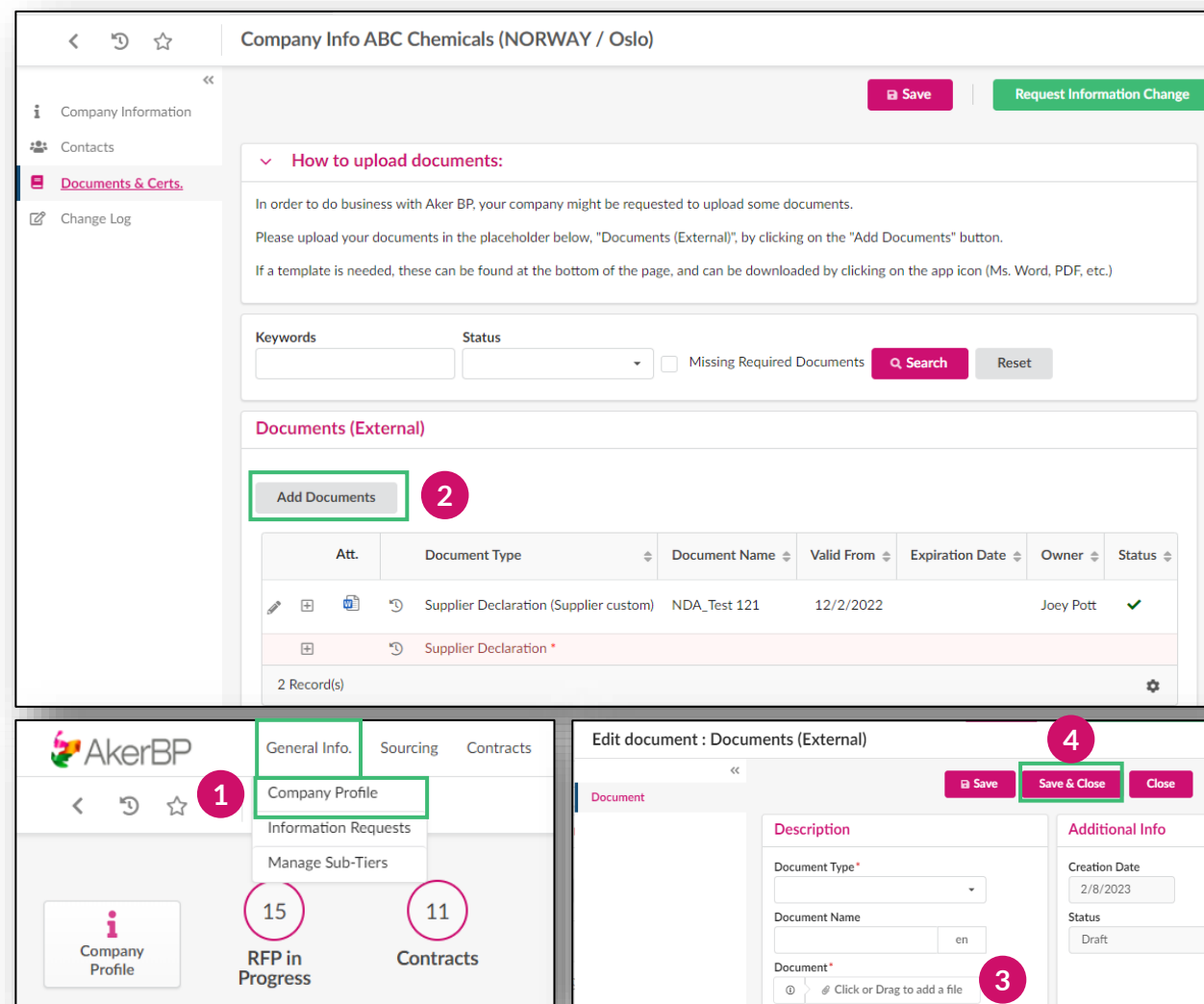
3. Document management

General administration

Note: *This is where you, as a supplier, can share documents with Aker BP. For example: a signed supplier declaration document.*

Manage documents

1 Go to general Info > company profile > **Documents & Certs** tab.

2 Add documents and certifications by clicking the buttons "**Add Documents**" (internal/external). For each button, a pop-up window will open.

3 Fill out the form and upload the corresponding document file. Mandatory fields are marked with a red star.

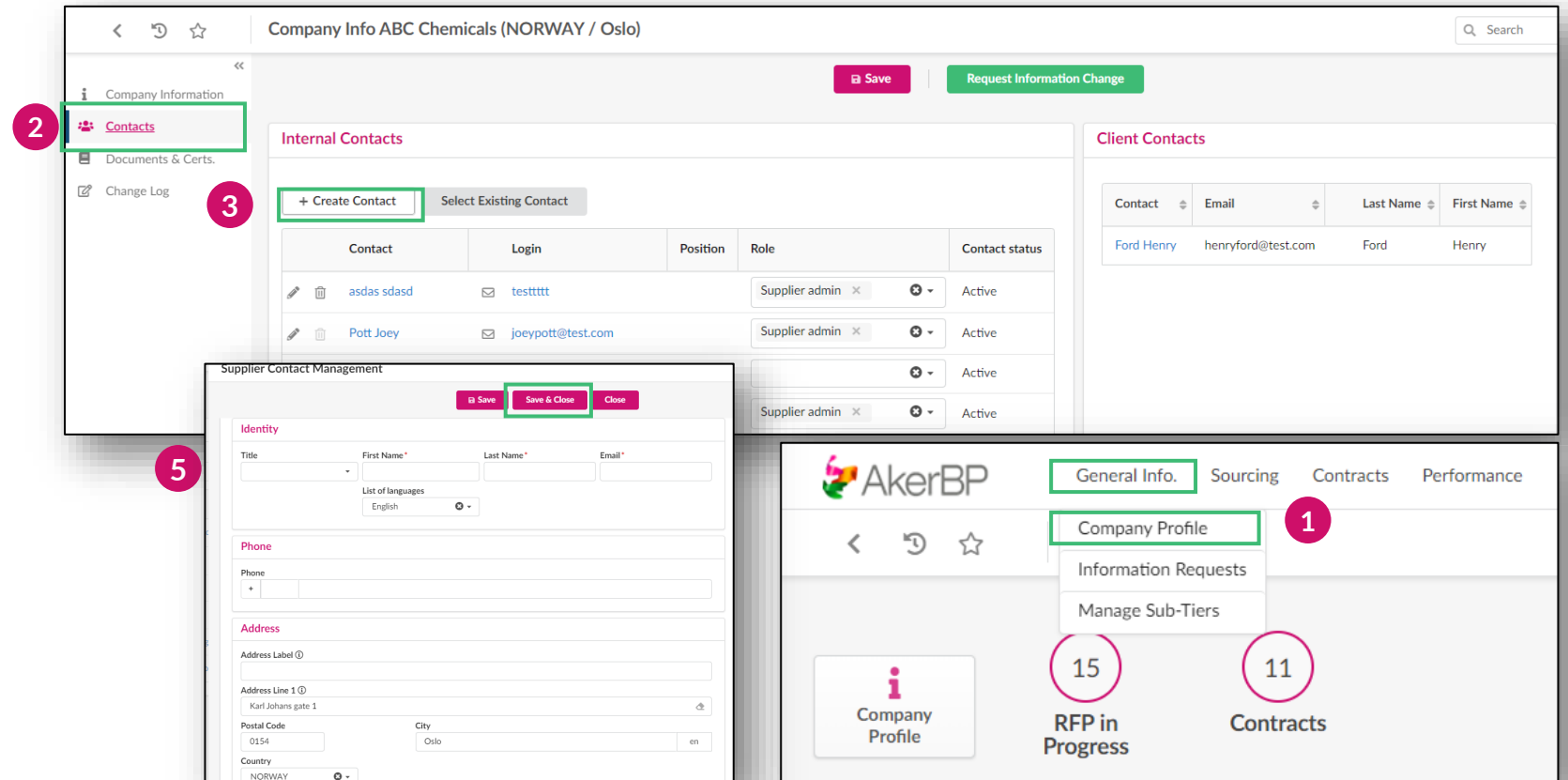**4** Once complete, click the **Save & Close** button.

4. Manage your contacts (internal team members)

General administration

Note: *You can add members from your firm as team members here. This way, they can enter Ivalua, and also access contracts they are added to.*

Manage contacts

1 Go to **general info > company profile.**

2 Go to the **Contacts** tab in the sidebar.

3 Click the **+ Create Contact** button. A registration form will open.

4 Fill in the registration form. Mandatory fields are marked with a red star.

5 Click **Save & Close.**

4. Manage your contacts
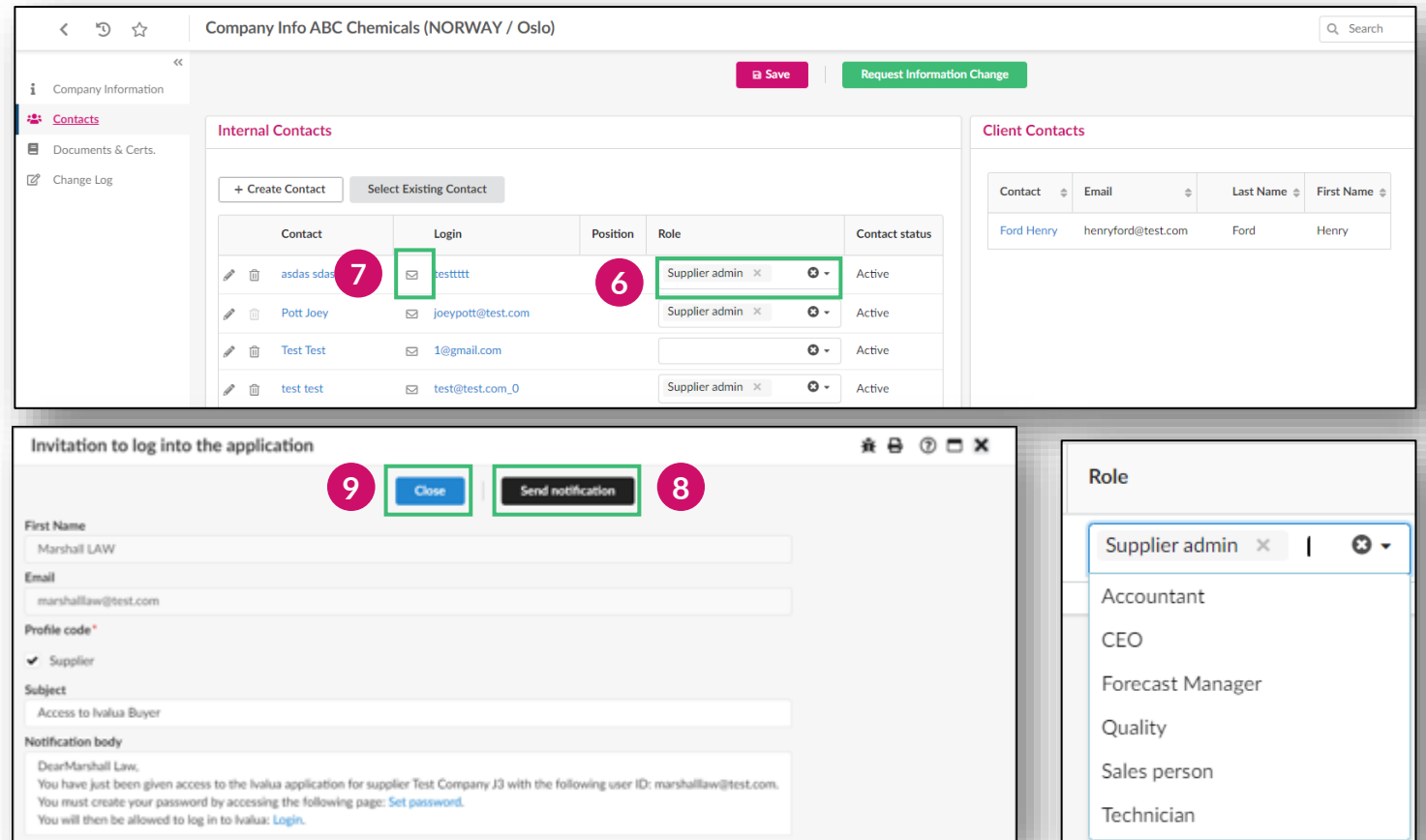
General administration

Manage contacts

6   Once a contact is created, you can assign them a role from the dropdown menu in the **role** field. It is possible to assign multiple roles to the same contact.

Note: It's mandatory that at least one of the contacts has the "Supplier admin" role assigned.

Note: *The different roles are mainly used for administration purposes. It will not result in different access rights, but in general, the supplier admin will be contacted/notified by Aker BP in different kind of events.*

7   Click **the envelope icon** to open an email draft for a login invitation to the newly created contact.

8   Click the black **Send notification** button to send the login request to the registered contact email address.

9   Click **Close.**

5. Sub-tier management

General administration

Aker BP encourages all suppliers to provide an overview of key suppliers in their supply chain. This is part of the supply chain transparency that Aker BP is looking for with partners.

From **Manage Sub-Tiers**, you can add or upload multiple sub-tier suppliers.

Add sub-tier (option 1)

1   On to **General Info > Manage Sub-Tiers.**

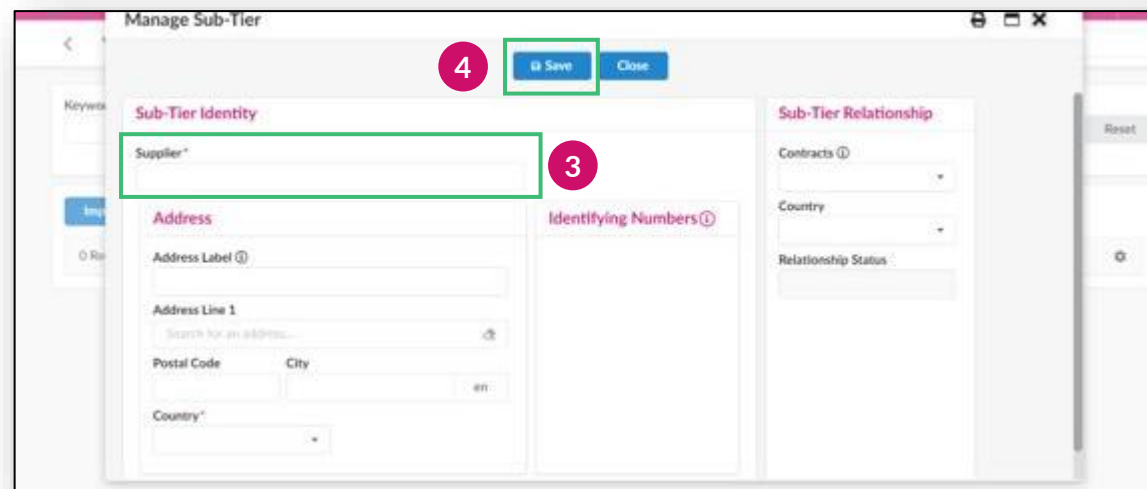**2**   Click **Add Sub-Tier** button. A pop-up window with a registration form will open
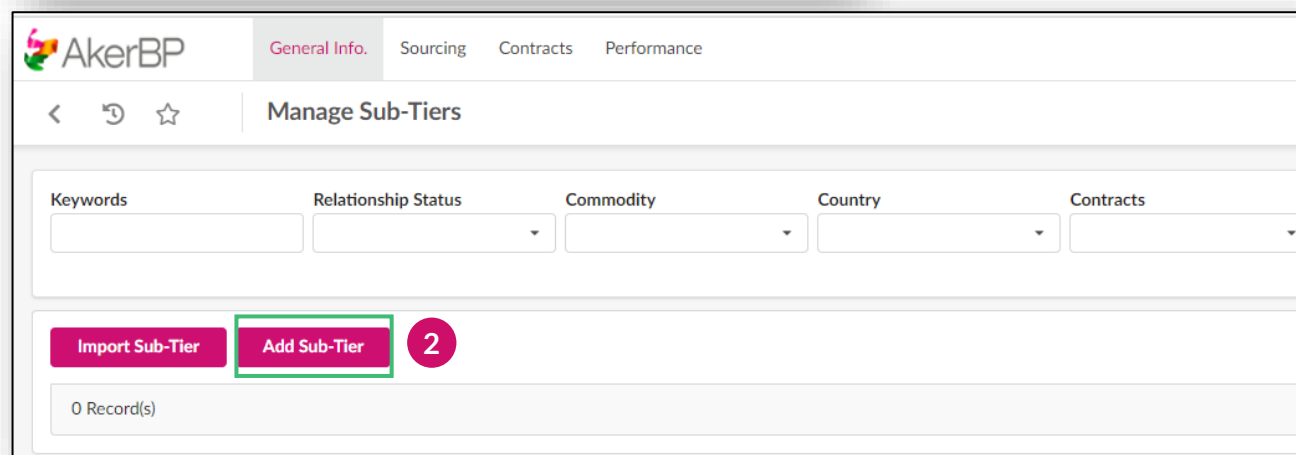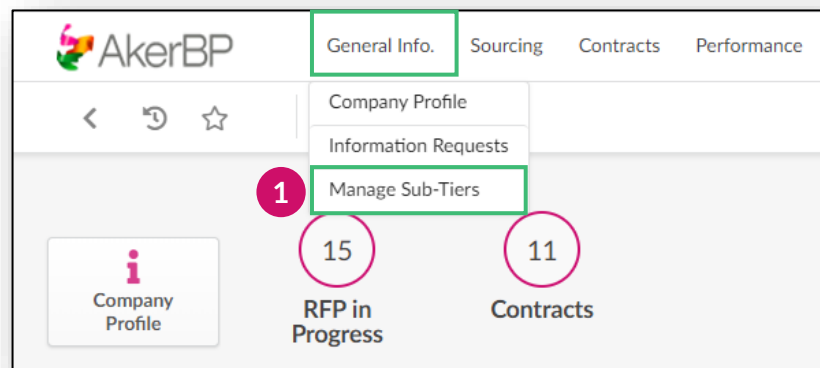
5. Sub-tier management
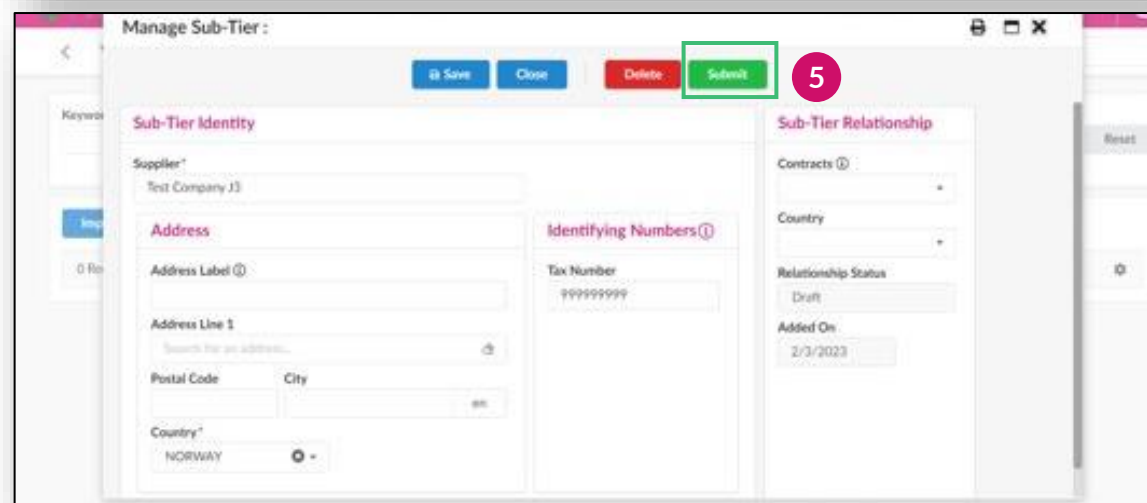
General administration

Add sub-tier (option 1)

3 Fill in the form. Mandatory fields are marked with a red star.

4 Click **Save.**

5 Click the **Submit** button to send to Aker BP for validation.
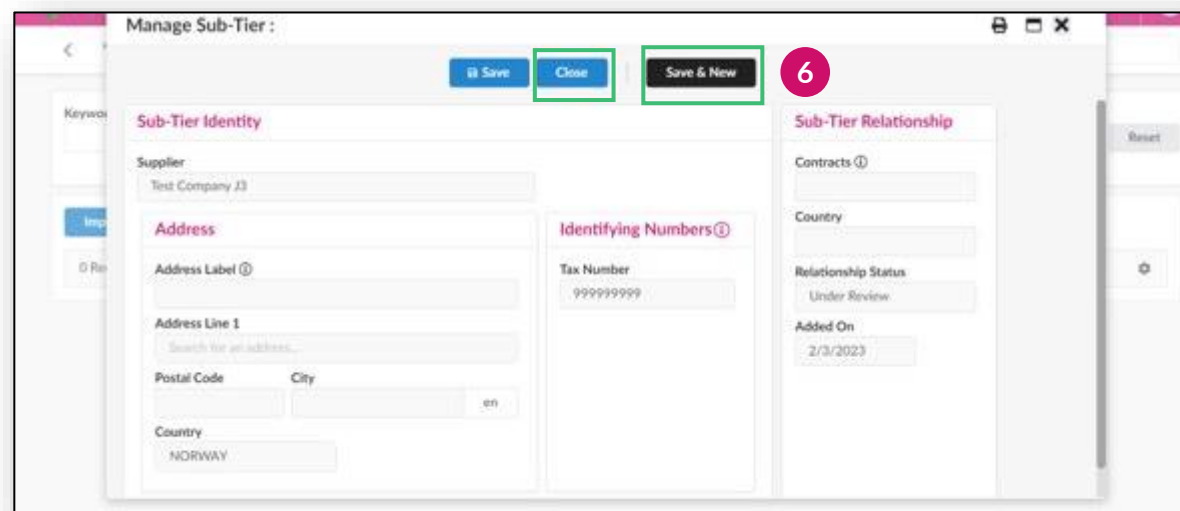
5. Sub-tier management

General administration

Add sub-tier (option 1)

6 Click **Close** to exit or **Save & New** to add another sub-tier.

7 The sub-tier should now appear in the list on the **Mange Sub-Tier** page.

You can also import sub-tiers here.

6. Communication with Aker BP via chat – supplier record

General administration

Initiate a chat conversation with Aker BP in Ivalua

1   Go to **General Info. > Company Profile.**

2   Click on one of the speech bubble icon that appears on the right side of your screen.

3   Click on "**Start a new conversation**" to open message editor.

4   Type your message.

5   Click on "@" to tag a person from client contacts or internal contacts.

6   Add attachments by clicking on the **paper clip icon.**

7   Click the **paper plane icon** to send.
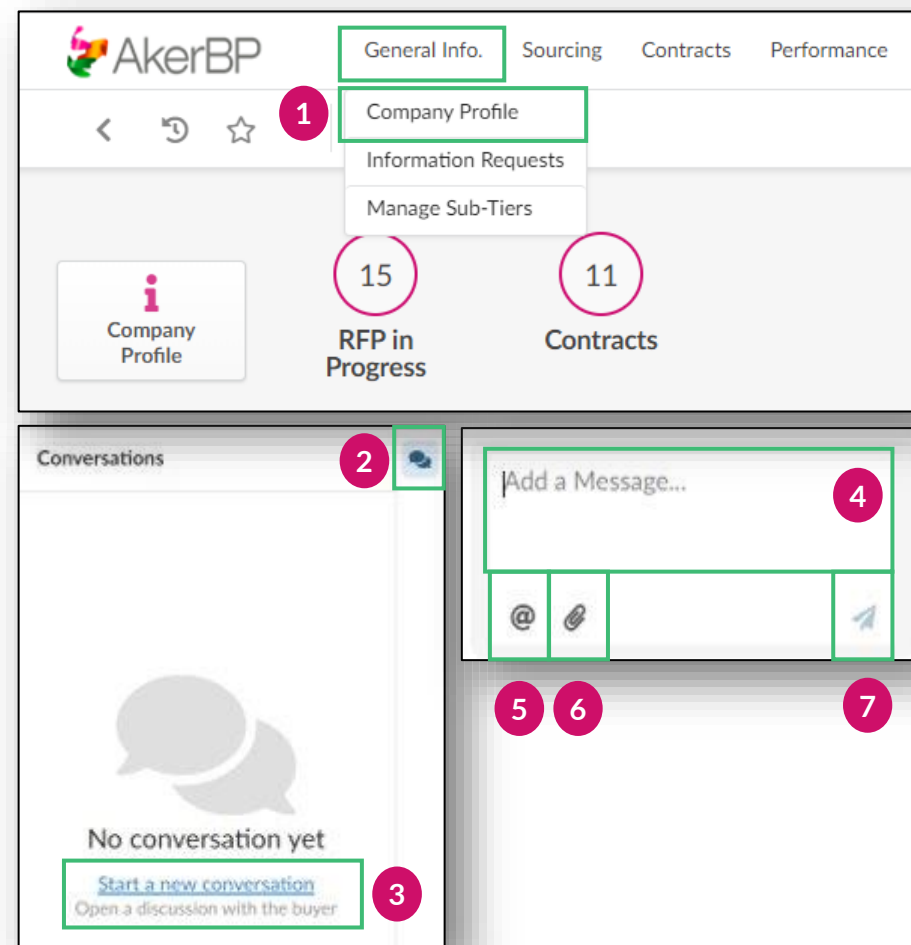
6. Communication with Aker BP via chat

General administration

Respond to a message

1 Go to the **bell icon** next to your name.

2 Click on **Messages.**

3 Click on the conversation with the right people.

4 Type your message.

5 Add attachments by clicking on the **paper clip icon.**

6 Click the **paper plane icon** to send.
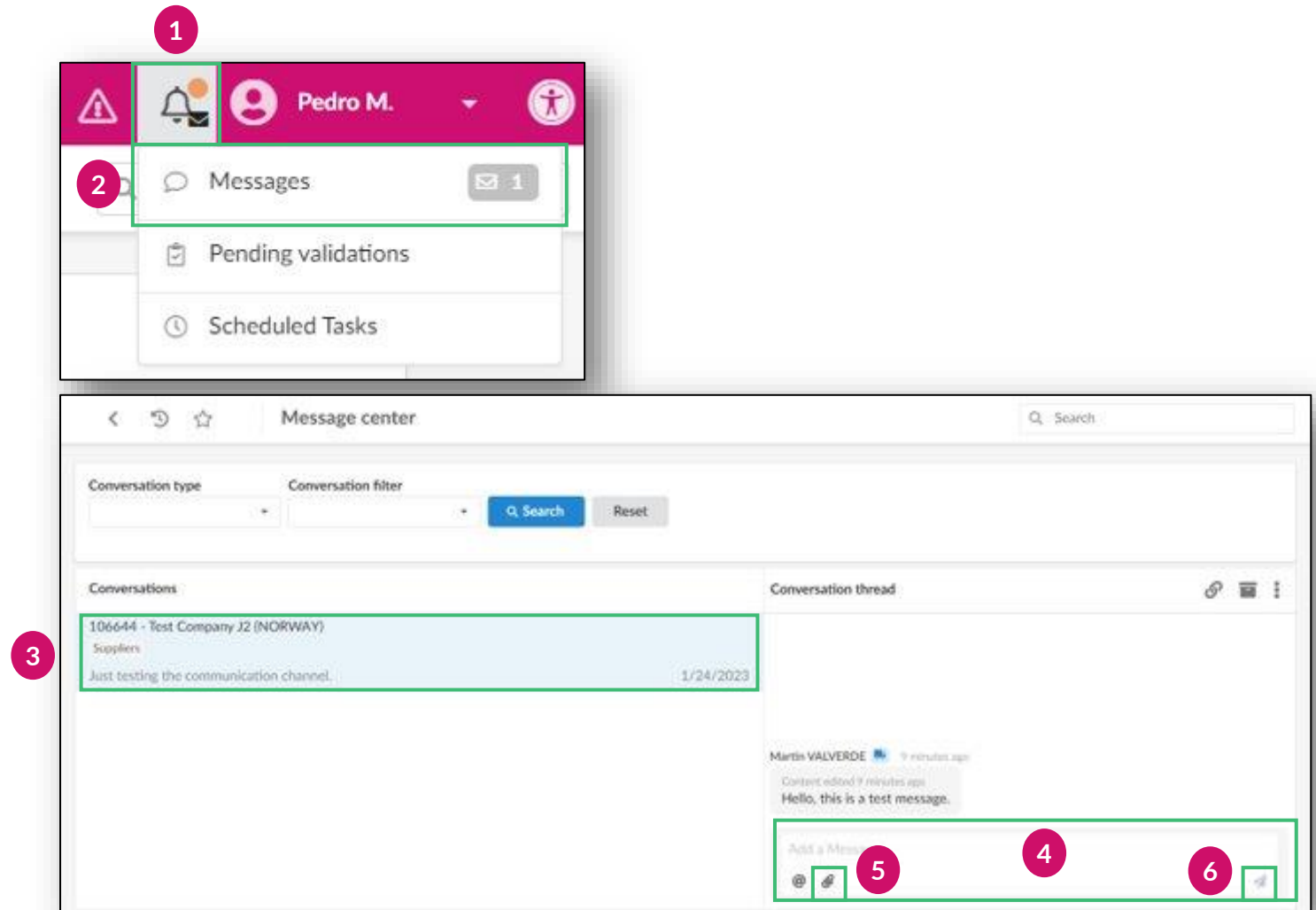
Responding to sourcing/RFx events

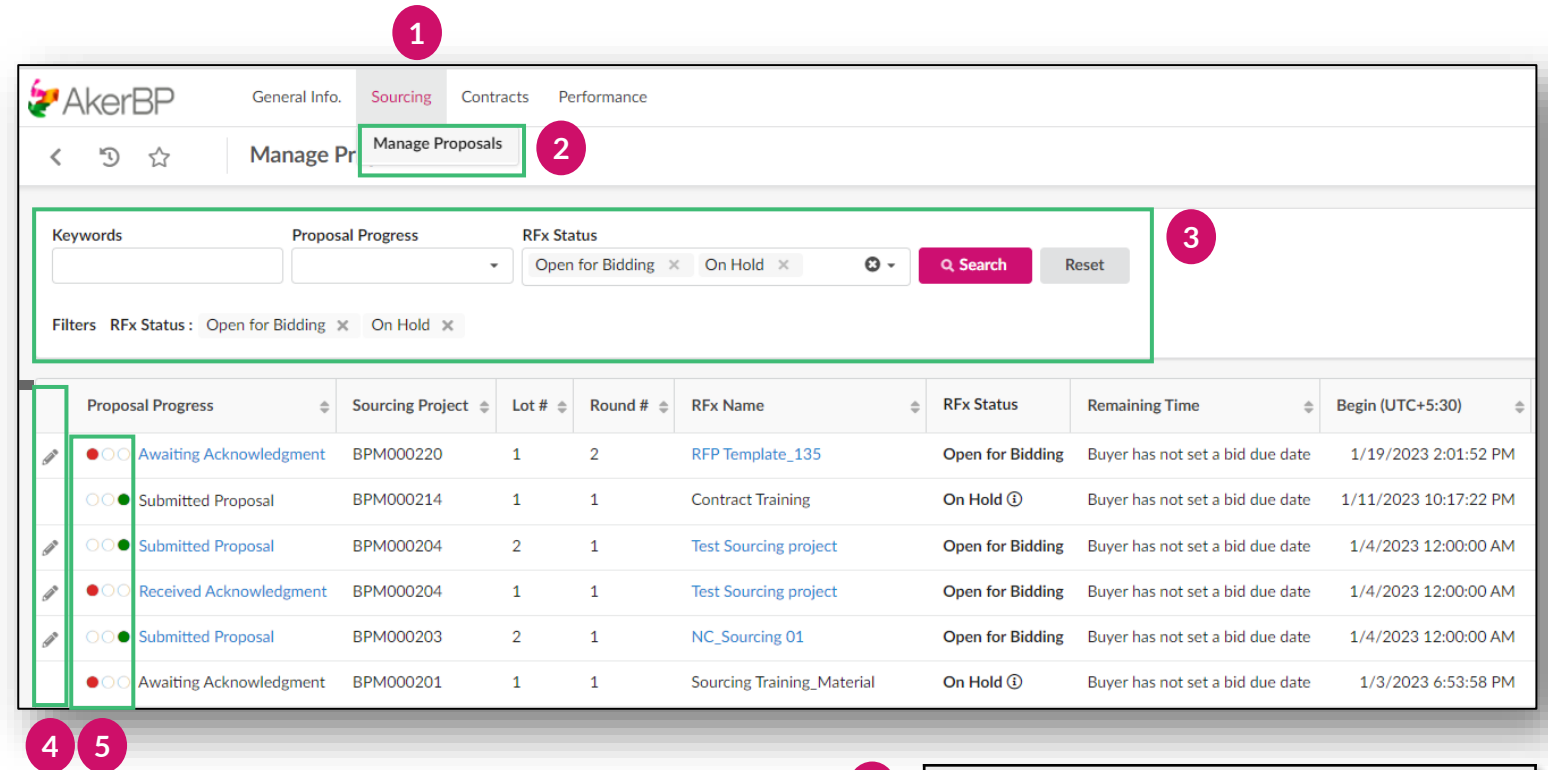How to respond to an RFx from Aker BP

1. How to access sourcing/RFx event

Sourcing/RFx events

Note: *If Aker BP sends out an RFI/RFP (and Aker BP consider your company as a potential supplier) you can find it on the supplier portal as described below.*

Sourcing

1 Go to **Sourcing > Manage proposals** to see current RFx's. (or click "RFP in progress" on home page).

2 The **Manage Proposals** page shows a list of proposals you are invited to.

3 You can use the search bar at the top to search and filter.

4 Open a request for proposal by clicking the **pencil icon.**

5 The colored circles (traffic lights) show the progress of your proposal (see table on the right).

Traffic Light Color Explanation	
Red	*Awaiting/Received Acknowledgement*
Yellow	*In Progress*
Green	*Submitted Proposal*

2. Provide access to the internal bit team members

Sourcing/RFx events

Sourcing

1   In the **My Team** tab you can add colleagues to help with the RFx response and proposal to Aker BP.

2   Select an existing contact in the Ivalua system from the **dropdown** or click the **Create a new contact** button and fill out the registration form to invite a new team member to collaborate with you on the response to Aker BP.

3. Respond to Sourcing/RFx event

Sourcing/RFx events

Note: *Before you can participate actively in a sourcing/RFx from Aker BP (and submit a proposal), all suppliers are requested to first agree to the terms & conditions.*

In order to start responding to the RFx and submitting your proposal, you will be requested to acknowledging the receipt of the RFx and declare your intent to make a proposal.

Sourcing

1 In the **Overview** tab, Click "**I agree to the terms and conditions**".

2 Afterwards, click the button "**I acknowledge receipt of this RFx**".

3 If you intend to provide a proposal, choose the option "Will Bid" and click **Submit.**

Note: *In case you do not agree to the terms & conditions, please contact* businesspartner@akerbp.com.

3. Respond to Sourcing/RFx event

Sourcing/RFx events

Sourcing

4   Go to the **Info** tab and enter a proposal title (using the field **Label**). You can also provide a validity end date and description (executive summary) for your response/proposal. Any documents can also be attached here.

Note: The tabs in the sidebar may vary depending on sourcing category selected by the Aker BP main responsible contact person.

3. Respond to Sourcing/RFx event

Sourcing/RFx events

Sourcing

In the **Items** tab, you can quote items in the table (if relevant) and click **Save.**

5

Aker BP may request that suppliers submit the pricing for items and services through a price book in an excel file instead of using this Items tab. In these cases this will be clearly communicated in the ITT documentation from Aker BP, or inside the Questionnaire section.

Note: There can be multiple grids or price books with items.

3. Respond to Sourcing/RFx event

Sourcing/RFx events
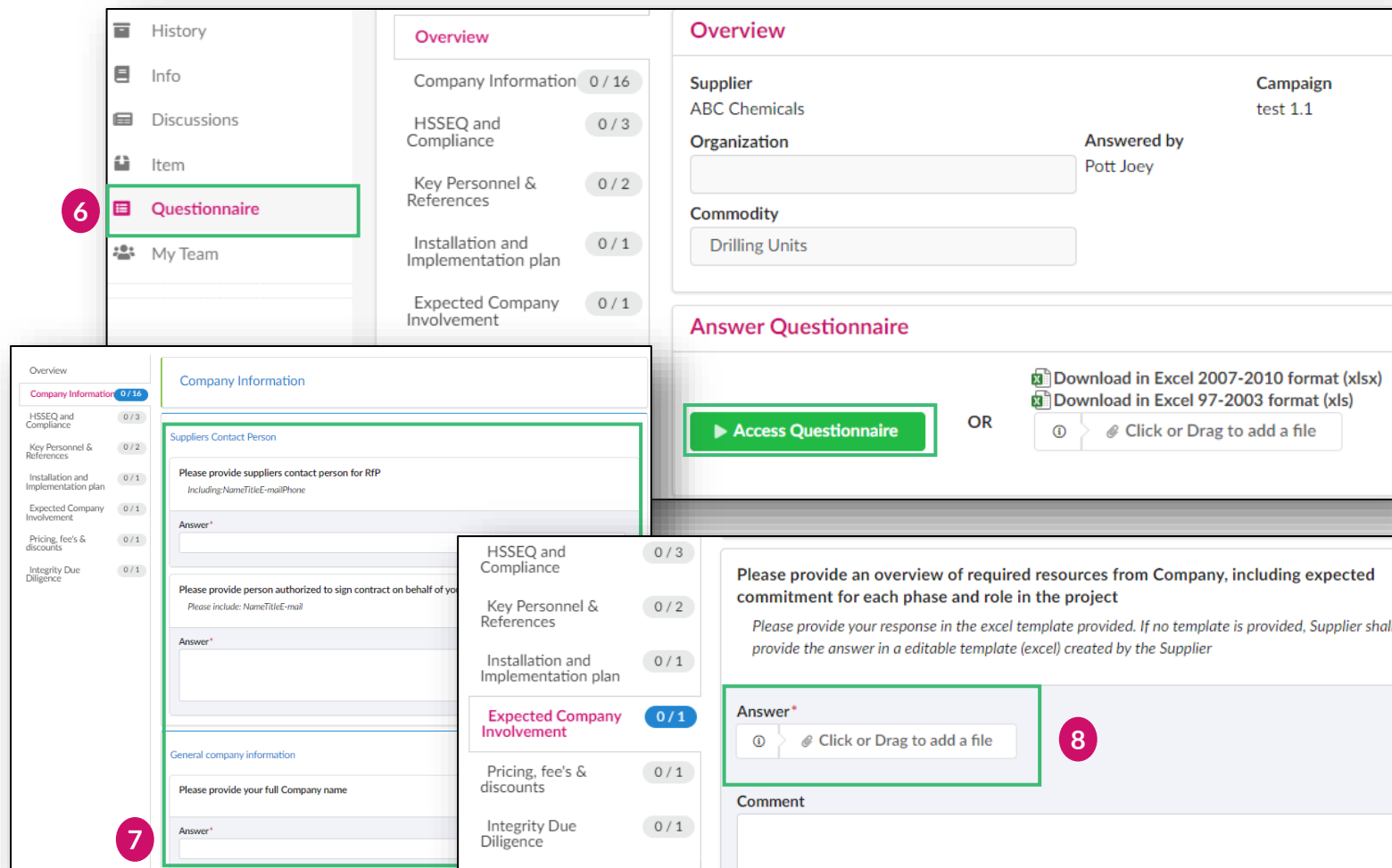
Sourcing

6 Go to the **Questionnaire** tab (if required) and complete the RFx questionnaire by clicking the **Access Questionnaire** button.

7 Provide responses to all the questions. Mandatory questions are marked with a red star.

8 You may be asked to upload mandatory document(s) as a response to a question in the questionnaire.

Note: there might be several sections to be answered in a questionnaire (navigate between sections by clicking on them). If desired, you can download the questionnaire to excel, provide your written responses, and re-upload, before completing the questionnaire with any mandatory documents.

3. Respond to Sourcing/RFx event

Sourcing/RFx events

Sourcing

9 Once you are done and want to submit your proposal, click **Validate & Submit Proposal**.

10 A popup will ask if you really want to submit. Review your proposal details and click **Submit my proposal.**

Note: You can still use the discussions tab for communication, but other fields, info and questionnaire fields are now locked.

test 1.1 (BPM000200) - Lot : 1 / Round : 1

9

Save | Download all contents of this RFx | **Validate & Submit Proposal** | Cancel Proposal

Do you really want to submit your proposal?

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

- 1 / 1 items have been filled.
- 25 / 25 questions have been filled.
- 9 document(s) have been attached to the proposal. (Questionnaires)
- Total number of attached documents: 9

10

Cancel | **Submit my proposal**
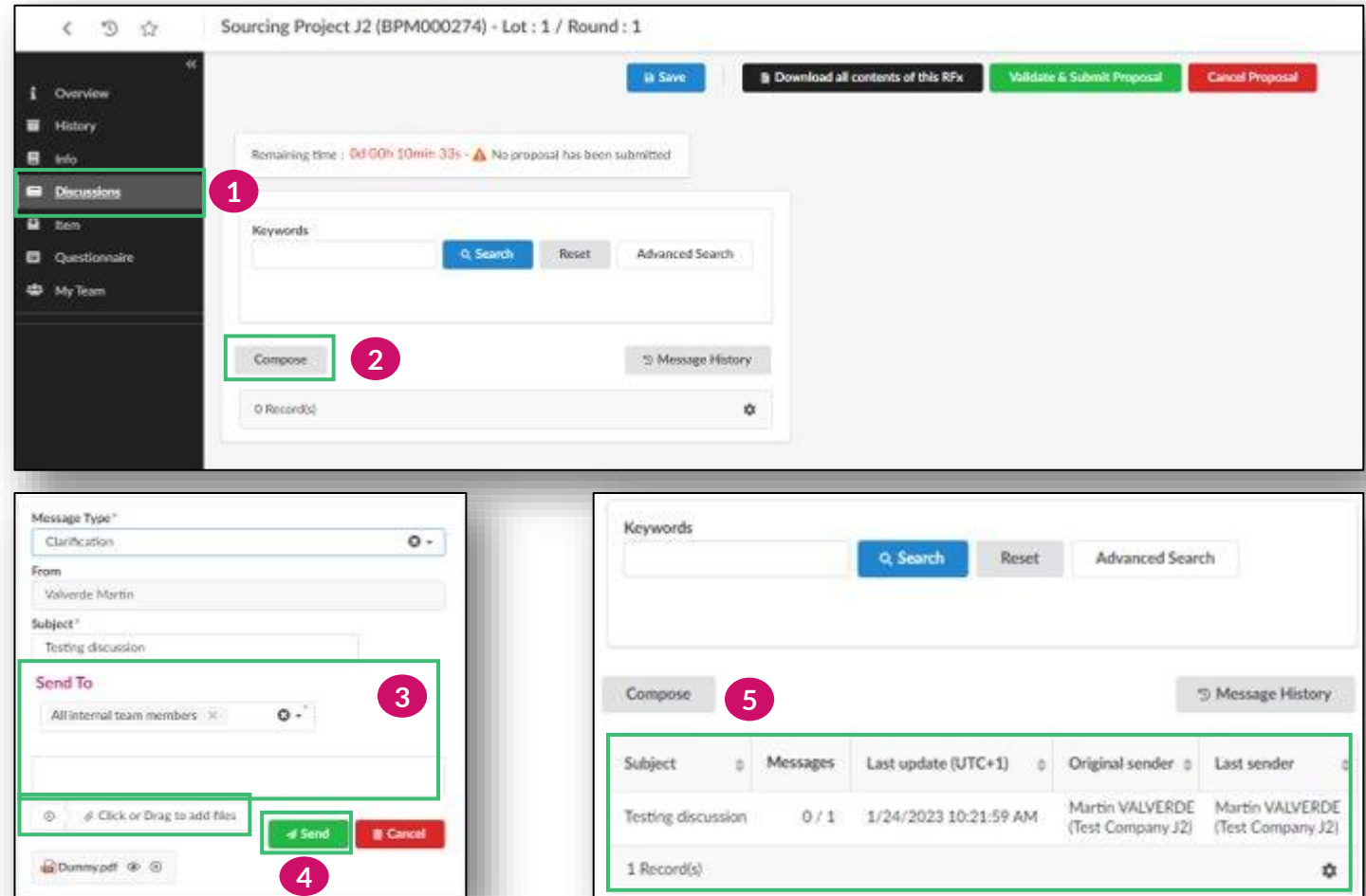
4. How to submit questions and request clarifications to Aker BP during sourcing/RFx

AkerBP

Sourcing/RFx events

Sourcing

1 In the **Discussion** tab, you can send a message to the Aker BP responsible for the RFx. You can also send messages to your internal team members.

2 Click **Compose**. A new form will appear.

3 Fill in the message form. It is also possible to attach files. You may also select 'Send To' above the message section.

4 Click **Send.**

5 A record of the message will appear in the table.

Note: *Aker BP will receive your question automatically. However, replies from Aker BP may only be in accordance with the instructions provided in the RFx documentation (i.e. Aker BP may only respond at agreed time stamps in the RFx process).*

5. Potential post-RFx activities and contract redlining
Sourcing/RFx events

- After the submission of your proposal/response to Aker BP's RFx, there are multiple outcomes
  - Aker BP may select:
    - To shortlist a selection of suppliers/bids and start subsequent RFx rounds (re-starting the process of responding to a Sourcing / RFx process)
    - To shortlist a selection of suppliers/bids and start more detailed contract negotiations (redlining) towards potentially awarding a contract
    - To reject one, many, or all proposals (and thereby terminate the process)

- In case you are shortlisted, there may be additional rounds you are requested to respond to

- Or, as mentioned above, you may be one of the suppliers that Aker BP has shortlisted to start contract negotiations
  - If you have been shortlisted, the following section highlight how you can negotiate/collaborate/redline a contract with Aker BP using Ivalua

- If you are the supplier finally awarded with a contract from Aker BP, please be aware that Aker BP will use **DocuSign** for e-signatures

6. Negotiating a contract with Aker BP in Ivalua

Sourcing/RFx events (contract negotiation after shortlisting)

Note: *If you have been shortlisted for further negotiations, you may be one of the chosen suppliers to receive a contract proposal for negotiation with Aker BP in Ivalua.*

Sourcing – contract negotiation

1 **Documents** marked "Pending External Review" are open for review and potentially negotiation/redlining in Ivalua.
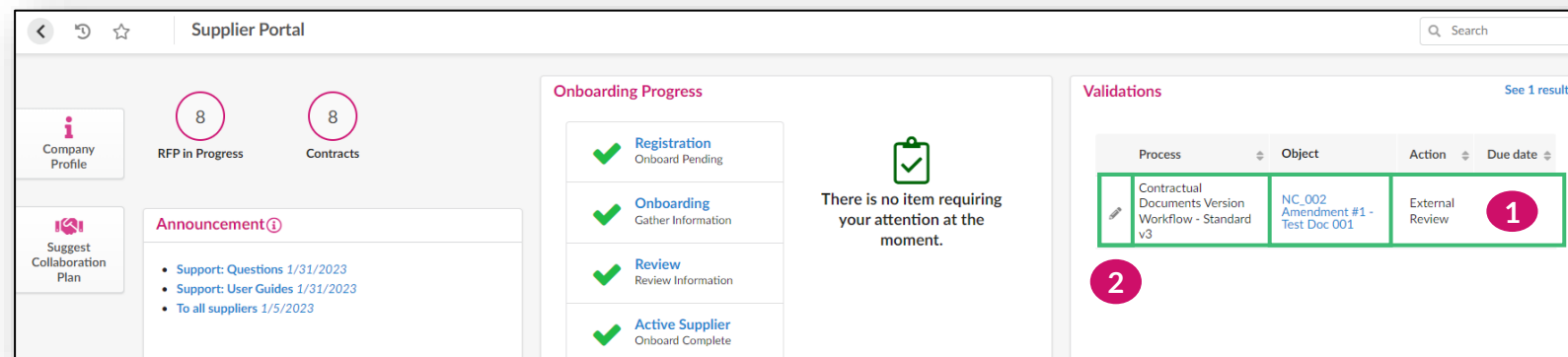
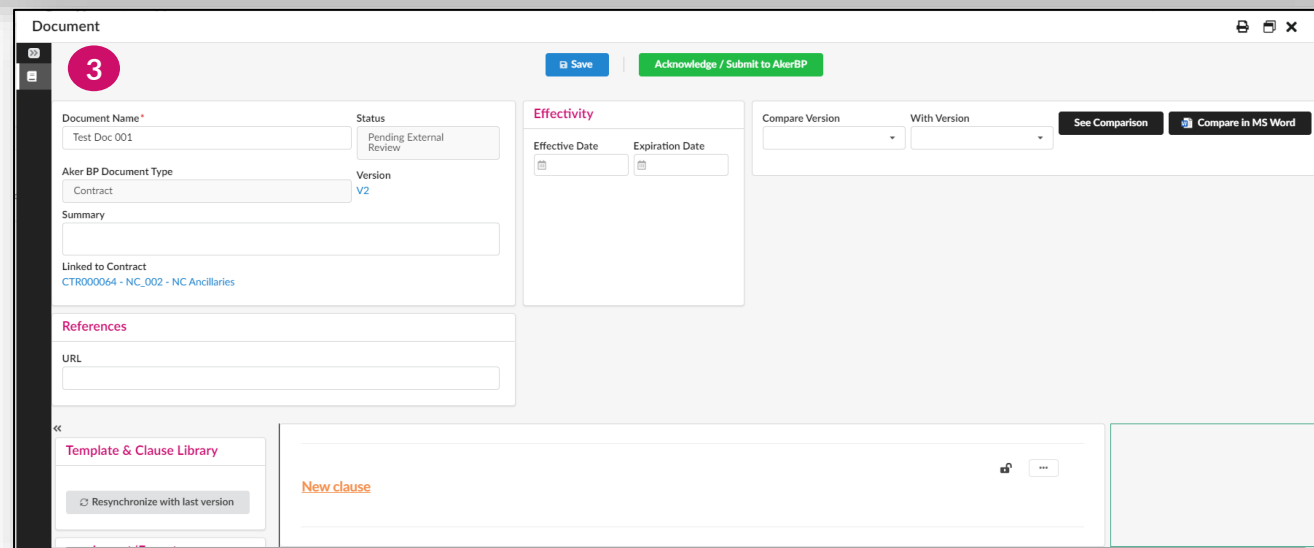*Note: Documents pending external review are also available from "Validation"- on your homepage.*

2 When "Pending External Review", click on the pencil-icon.

3 A new window is opened where you can review the proposed contract document from Aker BP, and edit/negotiate the contract document.

6. Negotiating a contract with Aker BP in Ivalua

Sourcing/RFx events (contract negotiation after shortlisting)

Negotiating/redlining/editing a contract document

4 Clauses and contractual text open for negotiation will be unlocked for editing.

5 Edit directly in the document, (note that all changes made are visible to Aker BP).

6 You can also add a comment by highlighting a part of the text and click the «comment»-button (comments are also visible to Aker BP).

7 Remember to click "Save" frequently to ensure your changes have been saved.

When you have concluded your review, added your proposed changes or comments, click «Acknowledge / Submit to Aker BP».

8 The Contract/Document is now sent back to Aker BP for review of the changes you have provided.

6. Negotiating a contract with Aker BP in Ivalua

Sourcing/RFx events (contract negotiation after shortlisting)

Negotiating/redlining/editing comparing versions

Contract negotiations (redlining) can go back and forth with Aker BP in Ivalua. For each iteration, a new version is created by Ivalua with changes tracked. You can always compare the different versions (incl. changes from Aker BP).
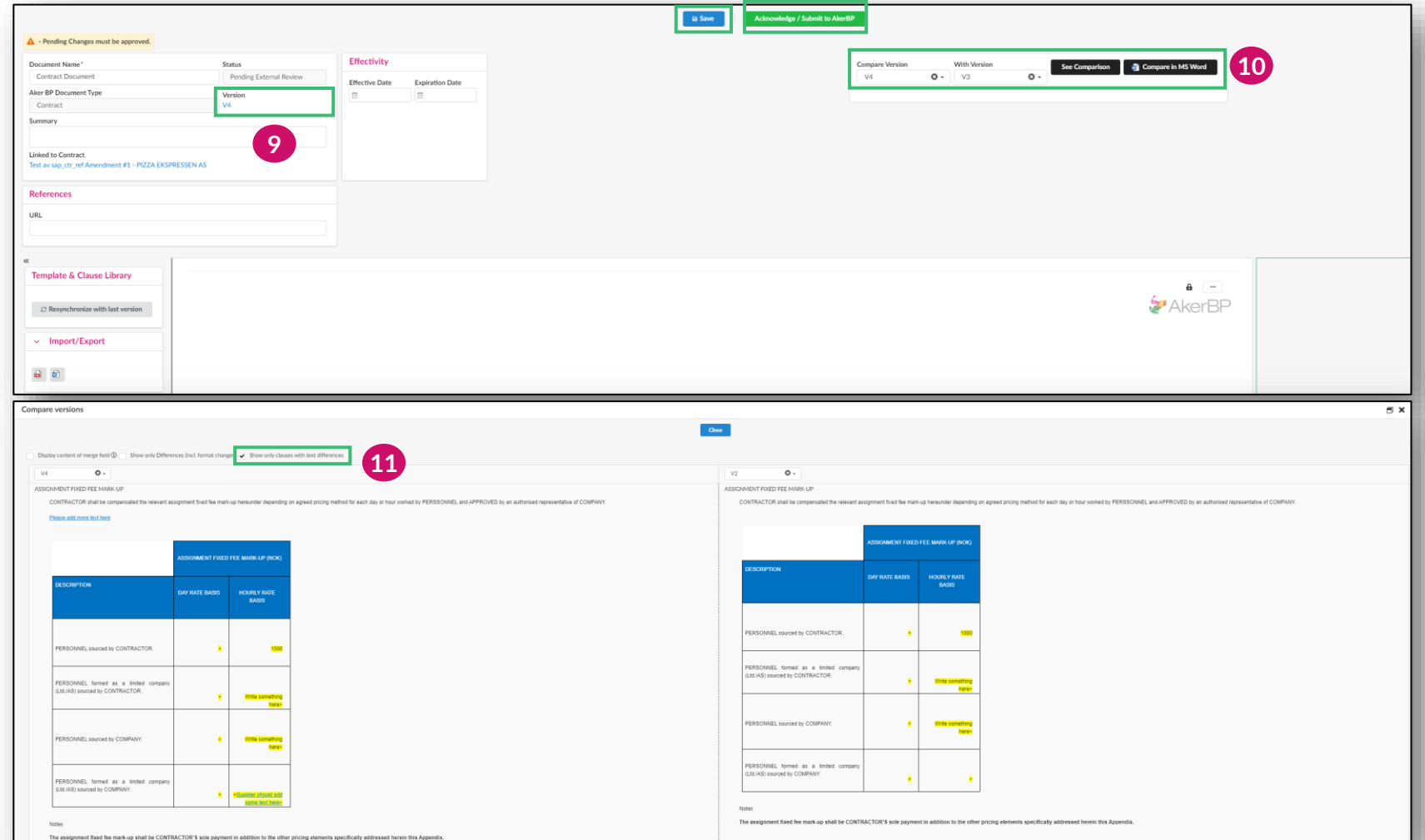
Note: *Aker BP will always approve any changes. If significant discussions are required, this is still recommended to be clarified in meetings rather than trying to agree.*

9   Current Document version.

10   Ability to compare: choose what versions you would like to compare, then click "See Comparison".

11   **Tip:** Check the box "Show only clauses with text differences" to only view changes since last version.

       Save the contract changes and click «Acknowledge / Submit to Aker BP» when ready.

7. Negotiating a contract with Aker BP in Ivalua – e-signature

Sourcing/RFx events (awarding and e-signatures using DocuSign)

Award & e-signature:

Note: *Aker BP uses DocuSign for e-signatures of contracts and key documents.*

If you are successful in your negotiations with Aker BP, Aker BP may award the RFx (or part of the scope) to you as supplier.

In this case, for all contract documents requiring a formal signature, Aker BP will utilize DocuSign to send the finished negotiated contract for signature with your designated representatives.

If you have any questions concerning the DocuSign process, please contact your Aker BP contact person.

Documents

Keywords ☐ 🔍 Search Reset   Modified on 📅   ☐ Current Price ⓘ

Document Type	Status	Signature Status	Aker BP Document Type
▾	▾	▾	▾

↪ 0 Selected Download documents (ZIP) Amend ⓘ **Activate e-Signatures** ☰ **Add** ▾ ☐ Only show amended documents

☐	Document Name ⇕	Version	Last Modified Date ⇕	Document Type ⇕	Status ⇕	Visible to Supplier ⇕	Download	Pending Validations	Aker BP Document Type ⇕	Signature Status
☐ ✏ 🗑	Contract Document	V5	09.02.2023	Contract Document (Template)	Complete	Yes	📄📄		Contract	• Aborted • Finalized • In progress

1 Record(s) ⚙

Contract management and collaboration

Managing contracts and documents with Aker BP in Ivalua
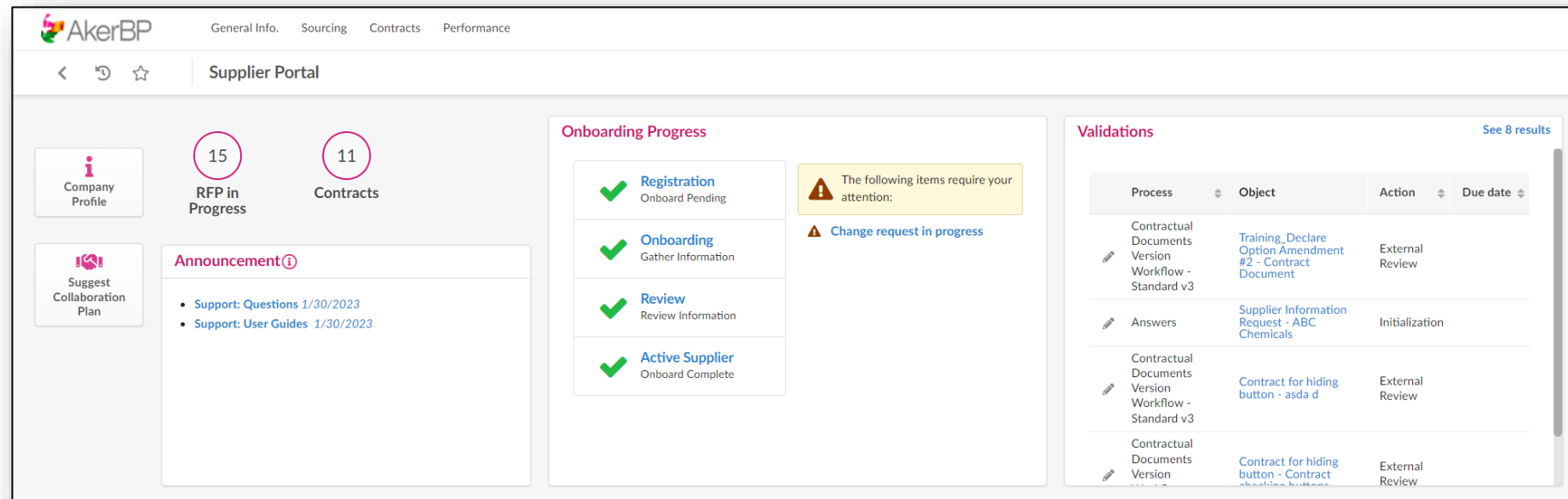
Introduction to contract management and collaboration

Contract management and collaboration in Ivalua

Ivalua will be used as a portal between Aker BP and you as a supplier.

In Ivalua you will have an overview of all active contracts shared by Aker BP. For each contract, you will have access to relevant information (e.g. contract documents) shared by Aker BP.

You will also be able to collaborate with Aker BP on contract documents directly in the system, including negotiating amendments and receiving formal contracts documents for review. There is also a feature to communicate with Aker BP through a chat function.

1. Browse & manage current contracts

Contracts

Contract information in Ivalua

1   Go to **Contracts > Manage Contracts.**

The Manage Contracts page contains a list of all your contracts with Aker BP.

Search and filter contracts by using the search bar at the top. It is possible to filter on keywords, contract type and contract status.

2

Note: You must always click the **Search** button to refresh after editing filters.

3   Click the pencil icon or contract name to open a contract record.

1. Browse & manage current contracts

Contracts

Contract information in Ivalua

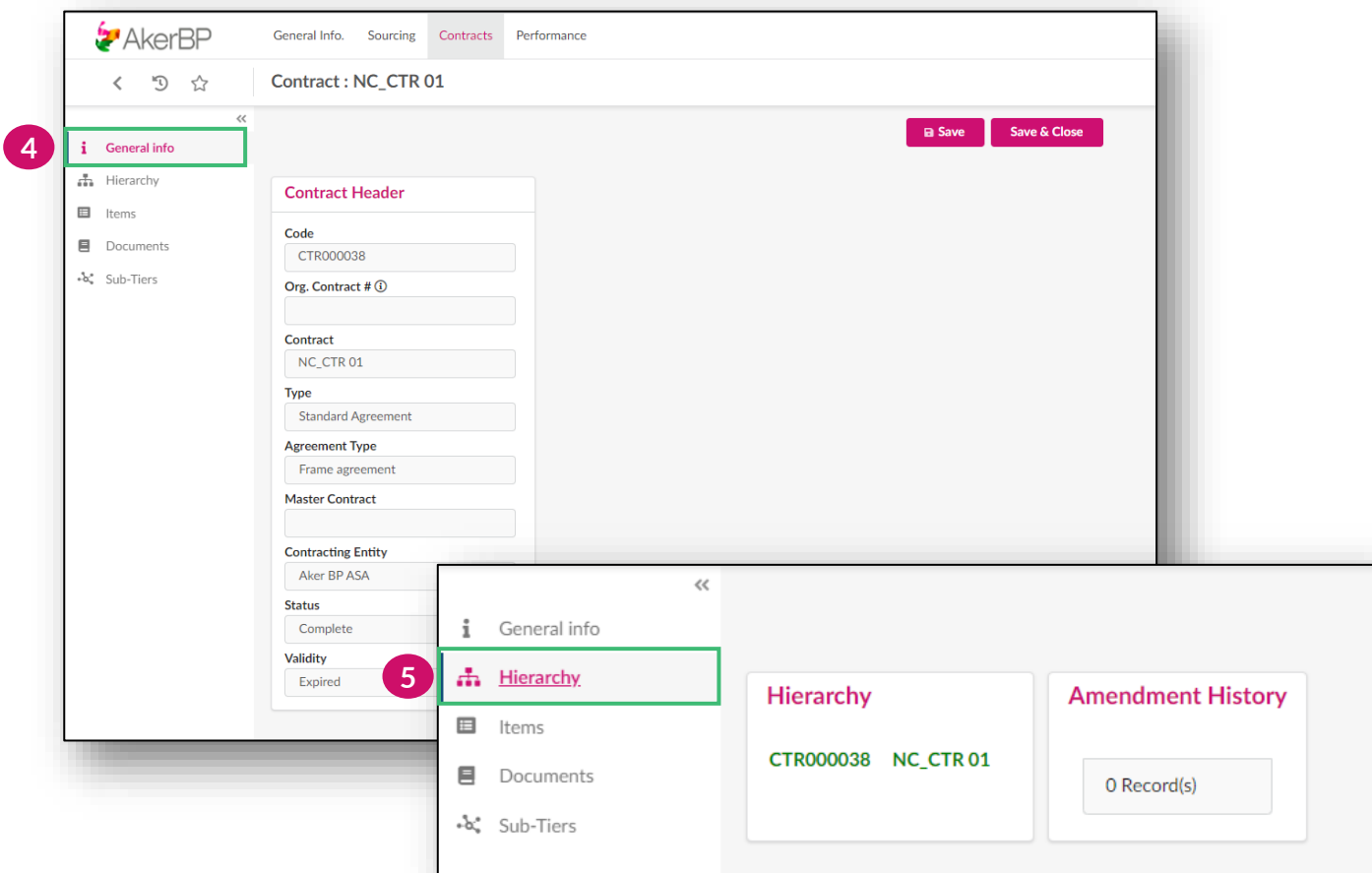**4**   Go to **General Info** tab.

Note: Here you can view all contract details.
For example: Contract name, type, status,
validity, etc.

5   Go to **Hierarchy** tab.

Note: Here you can view the hierarchy and any
amendment history of the contract.

1. Browse & manage current contracts

Contracts

Contract information in Ivalua

6 Go to **Items** tab.
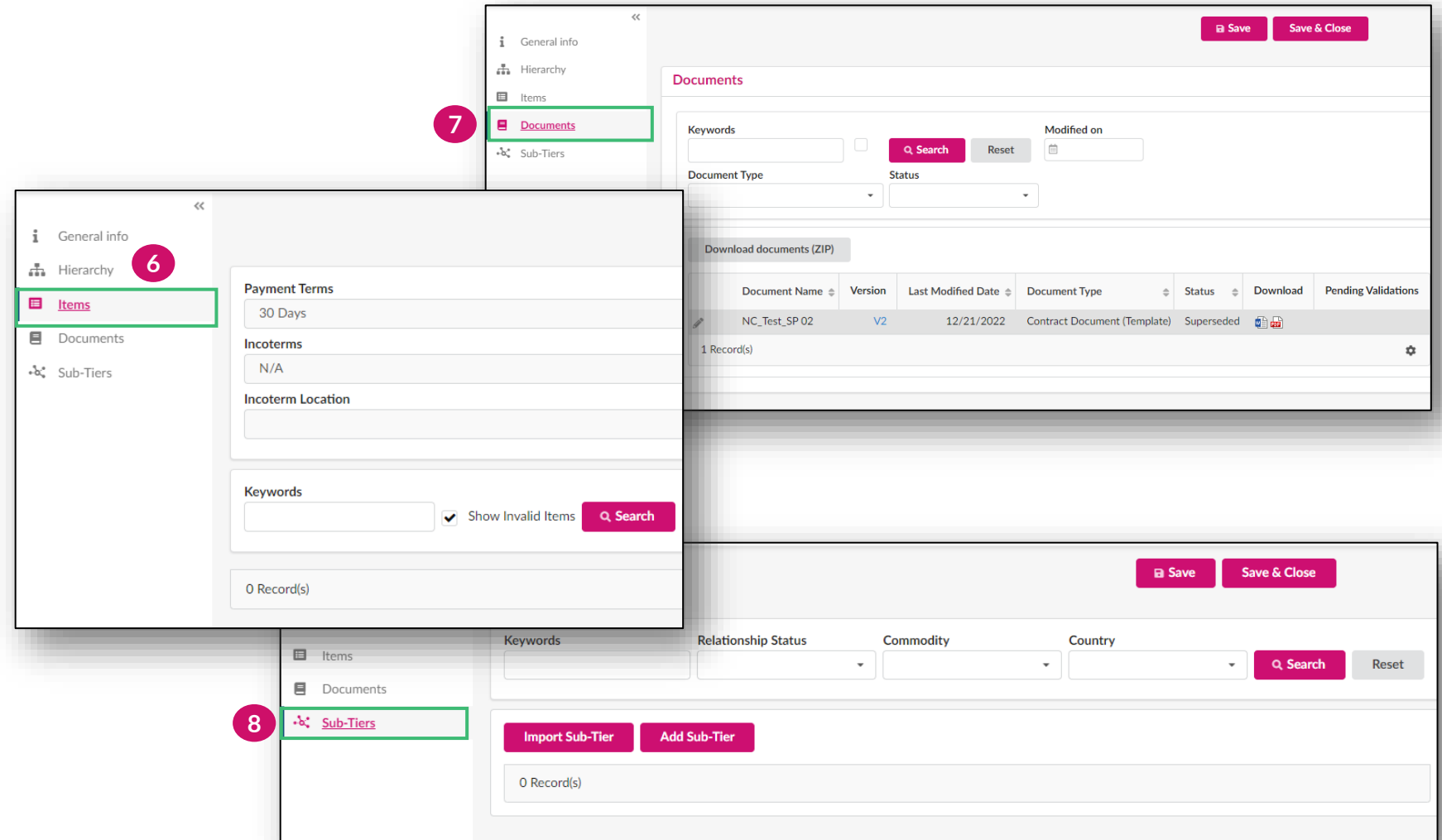
Note: The item grid along with information like payment terms and incoterms are found here.

7 Go to **Documents** tab.

Note: Contract documents are found here. You can also download documents from here.

8 Go to **Sub-Tiers** tab.

Note: Sub-tier information is found here. You can also import/add sub-tiers here in order to share your supply chain and key suppliers with Aker BP.

General info
Hierarchy
Items
7 Documents
Sub-Tiers

Save **Save & Close**

Documents

Keywords _____ **Search** **Reset** Modified on _____

Document Type _____ Status _____

Download documents (ZIP)

Document Name	Version	Last Modified Date	Document Type	Status	Download	Pending Validations
NC_Test_SP 02	V2	12/21/2022	Contract Document (Template)	Superseded		

1 Record(s)

General info
Hierarchy
6 Items
Documents
Sub-Tiers

Payment Terms
30 Days

Incoterms
N/A

Incoterm Location
_____

Keywords
_____ ✔ Show Invalid Items **Search**

0 Record(s)

Save **Save & Close**

Items
Documents
8 Sub-Tiers

Keywords _____ Relationship Status _____ Commodity _____ Country _____ **Search** **Reset**

Import Sub-Tier **Add Sub-Tier**

0 Record(s)

2. Contract document management – negotiation in Ivalua

Contracts

Some contract documents may be editable and enable negotiation (redlining) in Ivalua

1 Documents marked "Pending External Review" are open for review and potentially negotiation/redlining in Ivalua.
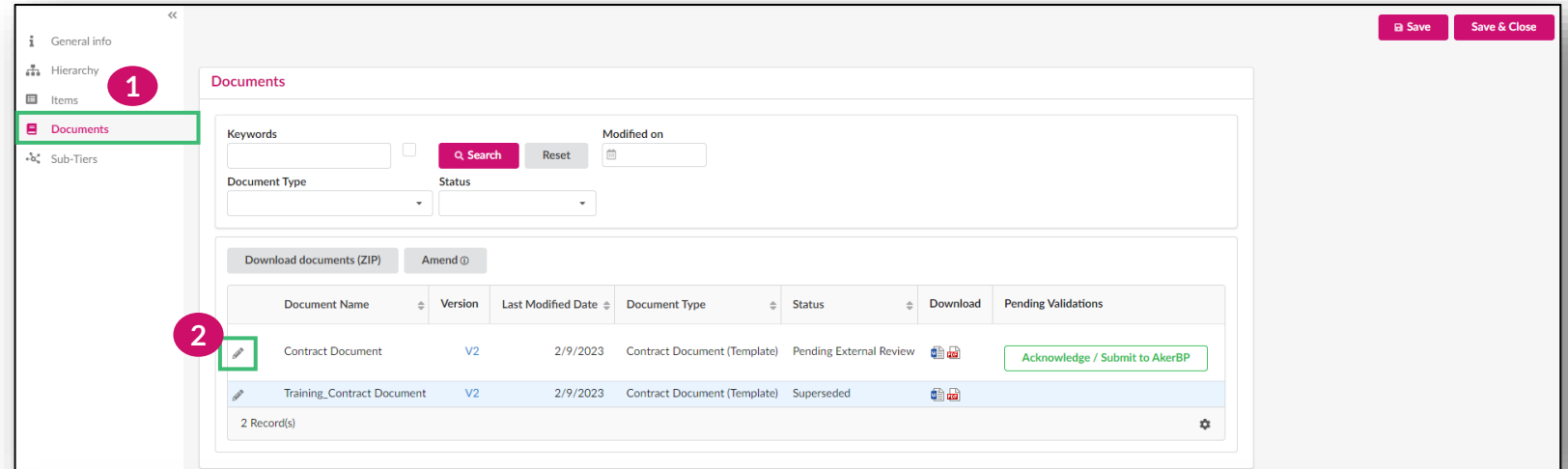
Note: Documents pending external review are also available from "Validation"- on your homepage.

2 When "Pending External Review", click on the pencil-icon.

3 A new window is opened where you can review the proposed contract document from Aker BP and edit/negotiate the contract document.

Document Color Explanation	
Blue	Document from earlier versions
White	Document from this amendment
Gray	Document amended

2. Contract document management – negotiation/redlining in Ivalua

AkerBP

Contracts

Negotiating/redlining/editing a contract document

4 Clauses and contractual text open for negotiation will be unlocked for editing.

5 Edit directly in the document, (note that all changes made are visible to Aker BP).

6 You can also add a comment by highlighting a part of the text and click the «comment»-button (comments are also visible to Aker BP).

7 Remember to click "Save" frequently to ensure your changes have been saved.

8 When you have concluded your review, added your proposed changes or comments, click «Acknowledge/Submit to Aker BP».

The Contract/Document is now sent back to Aker BP for their review.

2. Contract document management – negotiation/redlining in Ivalua

Contracts

Compare versions

Document redlining can go back and forth between Aker BP in Ivalua. For each change, a new version is created with tracked changes. You can always compare the different document versions.

Note: *Aker BP will always approve any changes. If significant negotiations or alignment is needed, this is still recommended to be clarified in a meeting.*

9   Current document version

10   Ability to compare: Choose what versions you would like to compare, then click "See Comparison".

11   **Tip:** Check the box "Show only clauses with text differences" to only view changes since last version.

Save the contract and click «Acknowledge / Submit to Aker BP» when ready.

3. Contract document management – e-signature (DocuSign)

Contracts

E-signature:

Documents requiring a formal signature, Aker BP will utilize DocuSign to send the finished negotiated contract for signature with your designated representatives.

If you have any questions concerning the DocuSign process, you can use the chat functionality (next slide), or reach out to your Aker BP contact.

Documents

Keywords		Modified on				Current Price ⓘ

Document Type	Status	Signature Status	Aker BP Document Type

↱ 0 Selected | Download documents (ZIP) | Amend ⓘ | **Activate e-Signatures** | ≡ Add ▾ | ☐ Only show amended documents

	Document Name ⇅	Version	Last Modified Date ⇅	Document Type ⇅	Status ⇅	Visible to Supplier ⇅	Download	Pending Validations	Aker BP Document Type ⇅	Signature Status
☐ ✎ 🗑	Contract Document	V5	09.02.2023	Contract Document (Template)	Complete	Yes	📄📄		Contract	• Aborted • Finalized • In progress

1 Record(s) ⚙

4. Contract document management – completed documents

Contracts

Document Overview

Once the document has been approved by Aker BP the document will be available in the documents-tab of your contract with status "Complete".

In this document overview, you will also find all contract documents Aker BP have selected to be visible to you as a supplier.

Aker BP will always control visibility on contract documents.

5. Communication with Aker BP via chat - contracts

Contracts

Initiate a conversation related to a specific contract with Aker BP

1 Go to **Contracts** > Manage Contracts.

2 Click on one of the **speech bubble icon** that appears on the right side of your screen.

3 Click on "**Start a new conversation**" to open message editor.

4 Type your message.

5 Add attachments by clicking on the **paper clip icon.**

6 Click the **paper plane icon** to send.
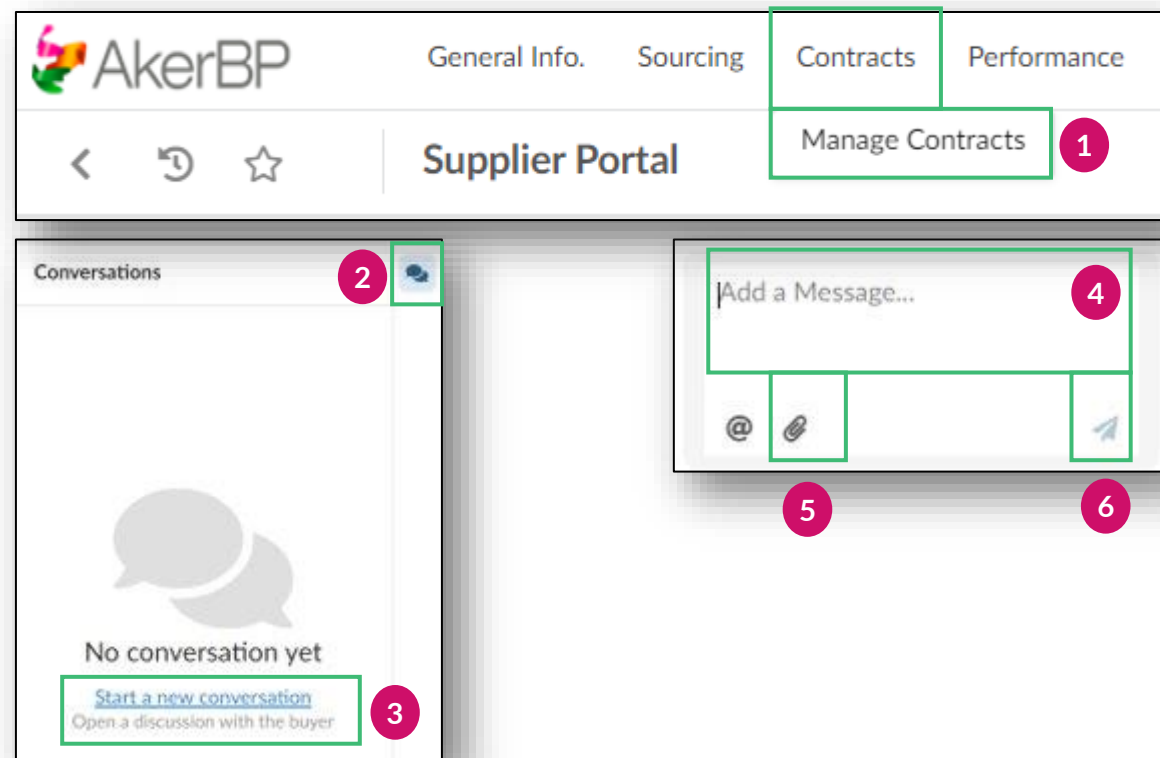
If anything is unclear in the above guide, please reach out to businesspartner@akerbp.com.