

# IVALUA Supplier Onboarding



Celestica™

# Indirect Procurement Management

## Ivalua

### *Purpose of Document*

- To provide a **step-by-step** guide of how to respond to the Request For Information related to your supplier record in Ivalua
- This training document contains screenshots from the Ivalua Tool

### *Intended Audience*

- This job aid is intended for Suppliers

### *Accessing the System*

A Supplier must be invited by a Celestica Indirect Procurement team member to access Ivalua and a link will be provided at that time.

The mandatory fields to fill in are:

- Supplier English Name
- Supplier Address
- Supplier (Group or Head Office)
  - The Supplier will receive an email notification to advise of the login and user name with a temporary password.
  - The General Terms of use must be completed.

### *Getting Help*

- Please email [indirect-documentation-cls@celestica.com](mailto:indirect-documentation-cls@celestica.com) if you have other questions or need help using Ivalua.

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/

***Supplier Onboarding Setup***

# Supplier onboarding Setup

## 1. Supplier Ivalua Login

JILD  
Celestica

General Info. Sourcing Contracts

Training Test Supp

General Terms of Use

You have to accept the terms and conditions in order to continue.

**GENERAL CONDITIONS OF ACCESS AND USE OF THE APPLICATION**

This document defines the general conditions of access and use of the Ivalua platform ("Application"). You ("User") may use the Application following your acceptance of these terms.

For all Users

User's access to the Application or removal from the access is performed at the discretion of Celestica.

Information contained in the Application is confidential and may be subject to separate confidentiality obligations. User shall use confidential information solely for the purpose for which it was disclosed and shall use the same care and discretion to avoid disclosure, publication or dissemination of confidential information as it uses with its own similar information, but in no case will User use less than a reasonable standard of care and discretion.

User's login and password information is confidential. The User shall take all necessary measures to keep such information confidential.

User undertakes not to act in any manner that would be likely to cause computer failures of whatsoever nature which would disrupt or create a risk of disruption of the Application and of its environment.

User will comply with all applicable local, state, national and foreign laws applicable to the use of the Application. User shall not transmit unlawful, infringing, harmful, or other data or code into the Application.

The User warrants that they have the right to provide information or data entered into the Application. User warrants not to decompile, disassemble, reverse engineer, or otherwise attempt to derive information or develop derivative work related to the Application.

User shall only use the Application for the intended purpose. The Application shall not be used for any other purpose.

Celestica will not be liable for any direct or indirect damages which may arise due to the access, the use or the impossibility to access the Application by the User. Celestica does not warrant uninterrupted or error-free operation of the Application or that it will correct any defects. The Application, all materials, information and services provided by Celestica are provided "AS IS" WITHOUT WARRANTIES OF ANY KIND.

3  I accept the terms and conditions

4 Acknowledge Print

1. The supplier contact will have received an invitation email to log into Ivalua. The email will have been initiated by the Celestica Category Management Team
2. The Supplier Contact, logs into Ivalua using a link provided in the invitation email
3. Selects the checkbox beside 'I accept the terms and conditions'
4. Select 'Acknowledge'

# Supplier onboarding Setup

## 2. Request for Information Submission

The top screenshot shows the Supplier Portal interface. On the left is a 'Company Profile' section. The main area is titled 'Supplier Portal' and contains an 'Announcement' on the left and a 'To-do List' on the right. The 'To-do List' has a red circle '1' next to the 'General Supplier Information - July 11 Sup' item. Below the 'To-do List' are two circular progress indicators: 'RFP in Progress' and 'Contracts', both showing '0'. The bottom screenshot shows the 'Answer Questionnaire: General Supplier Information' form. It has a sidebar with 'Overview' and 'General Information' sections. The main area has a 'Supplier' section and an 'Answer Questionnaire' section. A red circle '2' highlights the 'Access Questionnaire' button in the 'Answer Questionnaire' section.

1. From the Supplier Portal landing page, under the 'To-do List- Object column', select 'General Supplier Information'
2. Select 'Access Questionnaire'



# Supplier onboarding Setup

## 2. Request for Information Submission

Answer Questionnaire : General Supplier Information

Close Submit

Overview 3

General Information 2/4

Address 5/7

Legal Information 3/6

Contacts 10/10

Incoterms 0/2

Company Name

Answer\* 4  
July 11 Sup

Company Legal Name

Answer 5  
July 11 Sup

Website

Answer 6

Year of Incorporation

Answer 7

Next 8

3. Click on supplier “General Information”
4. Populate the company Name
5. Populate the company Legal Name
6. Populate an website URL in the 'Website' field
7. Populate the year of incorporation
8. Click on “Next” after completing and filing in the answers

# Supplier onboarding Setup

## 2. Request for Information Submission

Answer Questionnaire : General Supplier Information

Close Submit

Overview

General Information 4 / 4

**Address 7 / 7**

Legal Information 6 / 6

Contacts 10 / 10

Incoterms 2 / 2

Address

Address Label

Answer  
ccc

Address Line 1

Answer  
North York Blvd

Address Line 2

Answer  
cc

Zip Code

Next 11

9. Click on supplier “address”
10. Answer the seven questions related to “Address informations”:
  - a. Populate the company Address Line 1
  - b. Populate the company Address Line 2
  - c. Populate the company ZIP Code
  - d. Populate the company city
  - e. Populate the state/ Province
  - f. Select the country
11. Click on “Next” after completing and filing in the answers

# Supplier onboarding Setup

## 2. Request for Information Submission

Answer Questionnaire : General Supplier Information

Overview

General Information 4 / 4

Address 7 / 7

12 Legal Information 6 / 6

Contacts 10 / 10

Incoterms 2 / 2

Federal Tax Filing

Answer

Corporation / Incorporated (CORP, INC.)

Tax ID Number

Answer\*

123456789

Tax ID Number 2

Answer

dd

Description of Services to be Performed

Answer

dd

Next 14

12. Click on supplier “Legal Information”
13. Answer the six questions related to “Legal information”:
  - a. Populate the Federal Tax Filing
  - b. Populate the Tax ID Number
  - c. Populate the Tax ID Number 2
  - d. Describe the services to be performed
  - e. Select the Vendor Operations Location
  - f. Populate the Federal TIN Category
14. Click on “Next” after completing and filing in the answers



# Supplier onboarding Setup

## 2. Request for Information Submission

Answer Questionnaire : General Supplier Information

Close Submit

Overview

General Information 3/4

Address 5/7

Legal Information 4/6

Contacts 10/10 **15**

Incoterms 0/2

### Contacts **16**

Sales Contact

Name

Answer\*

John

Role

Answer\*

Sales

Email

Answer\*

email@test.com

Next **17**

15. Click on supplier “Contact”
16. Answer the ten questions related to “Contacts”:
  - a. Populate the sales contact
  - b. Populate the role
  - c. Populate email
  - d. Populate the phone number
  - e. Populate the Fax
  - f. Populate the Remittance contact
  - g. Populate the Remittance role
  - h. Populate the Remittance email
  - i. Populate the Remittance phone number
  - j. Populate the Remittance Fax
17. Click on “Next” after completing and filing in the answers

# Supplier onboarding Setup

## 2. Request for Information Submission

### Answer Questionnaire : General Supplier Information

Overview

General Information 3 / 4

Address 5 / 7

Legal Information 4 / 6

Contacts 10 / 10

Incoterms 18 2 / 2

Close Submit 20

Incoterms

Incoterm

Answer

Carriage Paid To (CPT)

Incoterm Location

Answer

Canada ✓

Previous

18. Click on supplier “Incoterms”

19. Answer the two questions related to “Incoterms”:

- Select incoterm type
- Populate incoterm location

20. Click on “Submit” after completing and filing in the answers

# Supplier document management

## 3. Supplier Document Management

The screenshot shows the Celestica Supplier Portal interface. At the top, there is a navigation bar with 'Phase 2 UAT' and 'Celestica' on the left, and 'General Info.', 'Sourcing', and 'Contracts' on the right. Below the navigation bar, the page title is 'Supplier Portal'. On the left side, there is a 'Company Profile' icon. The main content area is divided into two sections: 'Announcement' and 'To-do List'. The 'Announcement' section contains a welcome message and a list of training videos. The 'To-do List' section has a table with columns: 'Process', 'Object', 'Action', and 'Due date'. The first row of the table is highlighted with a red circle containing the number '1'. The first row contains the following data: 'CLS Supplier Activation', 'Nadia (CANADA)', 'Enrollment Prep', and an empty 'Due date' column. To the right of the 'To-do List' section, there are two circular indicators: 'RFP in Progress' with a '0' inside, and 'Contracts' with a '0' inside.

Phase 2 UAT  
Celestica  
General Info. Sourcing Contracts

< ↻ ☆ Supplier Portal

**Company Profile**

**Announcement**

Welcome to Celestica's Supplier Portal. This portal will enable you to interact with Celestica from responding to requests, communicating with the Celestica procurement team as well as collaborating and finalizing documents such as contracts and forms.

Please remember to abide by the general terms you have accepted when first accessing the Celestica Indirect Procurement platform, provided by Ivalua.

Included below is Training Material Available to help you get familiar with Ivalua:

- [Supplier Overview Training Video](#)
- [Supplier NDA Training Video](#)
- [Supplier Sourcing Training Video](#)
- [Supplier Contract Negotiation Training Video](#)

Training videos accessible in China:

[Supplier Video Overview Training](#)

**To-do List** [See 2 results](#)

Process	Object	Action	Due date
CLS Supplier Activation	Nadia (CANADA)	Enrollment Prep	

0  
RFP in Progress

0  
Contracts

1. From 'To-do List' select 'supplier name' under the object column

# Supplier document management

## 3. Supplier Document Management - Legal documents (1/2)

Phase 2 UAT  
Celestica

General Info. Sourcing Contracts

Supplier Portal

Company Info Nadia (CANADA / Ontario / North York)

Save Close Reject Supplier Onboarding Request Submit for Activation

Note that at least one blocking alert exists on this object. [Click here to review it.](#)

Documents & Certs.

Keywords Status Archived Documents Missing Required Documents Search Reset

Legal Documents

Add Legal Documents

Att.	Document Type	Document Name	Begin Date	Expiration Date	Owner	Status
	Other	XX	10/14/2024	10/14/2025	CM Member	

1 Record(s)

Diversity Certifications

Add Diversity Certifications

Att.	Document Type	Document Name	Begin Date	Expiration Date	Owner	Status
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[Site map] [Legal mentions]

Celestica v2.0 © Phase

2. Select the 'Documents' tab
3. Select the '+' icon beside the required document

# Supplier document management

## 3. Supplier Document Management - Legal documents (2/2)

Edit document : Legal Documents

Save Save & Close Close Archive

**Description**

Document Type\* Status  
Legal Documents / Other Draft

Document Name Begin Date\*  
en

Document\* Expiration Date  
Click or Drag to add a file

Link to external document

Document's owner Validity  
OCM Hatim

**Follow up**

Notification Date

Date Archived

Request Date

**Comments**

Add a comment here

4. Enter a name in the 'Document Name' field
5. Select the begin date
6. Select the 'Click or drag to add a file' and select a file from your local computer
7. Select the expiration date
8. Select 'Save & Close'

# Supplier document management

## 3. Supplier Document Management - Diversity Certifications (1/2)

Company Info Nadia (CANADA / Ontario / North York)

Save Close Reject Supplier Onboarding Request Submit for Activation

### Diversity Certifications

Add Diversity Certifications

Att.	Document Type	Document Name	Begin Date	Expiration Date	Owner	Status
<b>9</b>	Diversity Certificate	bb	10/14/2024	11/29/2024	CM Member	✖
	Diversity Certificate	bb	10/17/2024	11/20/2024	Hatim OCM	✖

2 Record(s)

### Documents

Add Documents

Att.	Document Type	Document Name	Begin Date	Expiration Date	Owner	Status
	Supplier Continuity Survey		10/14/2024		CM Member	✖
	Non Disclosure Agreement		11/4/2024	11/4/2025	CM Member	✖

9. Select the '+' icon beside the required document

# Supplier document management

## 3. Supplier Document Management - Diversity Certifications (2/2)

Edit document : Legal Documents

The screenshot shows a web interface for editing a document. At the top, there are buttons for 'Save', 'Save & Close', 'Close', and 'Archive'. The main form is titled 'Edit document : Legal Documents'. It is divided into two main sections: 'Description' and 'Follow up'. The 'Description' section includes fields for 'Document Type\*' (set to 'Legal Documents / Other'), 'Status' (set to 'Draft'), 'Document Name' (with a red circle 10), 'Begin Date\*' (with a red circle 11), 'Document\*' (with a red circle 12 and a file upload icon), 'Expiration Date' (with a red circle 13), 'Link to external document', 'Document's owner' (set to 'OCM Hatim'), and 'Validity'. The 'Follow up' section includes fields for 'Notification Date', 'Date Archived', and 'Request Date'. At the bottom, there is a 'Comments' section with a text area labeled 'Add a comment here'. A red circle 14 highlights the 'Save & Close' button.

10. Enter a name in the 'Document Name' field
11. Select the begin date
12. Select the 'Click or drag to add a file' and select a file from your local computer
13. Select the expiration date
14. Select 'Save & Close'



# Supplier document management







## 3. Supplier Document Management - Documents(1/2)


Company Info Nadia (CANADA / Ontario / North York)

Save Close Reject Supplier Onboarding Request Submit for Activation

### Diversity Certifications







Add Diversity Certifications

Att.	Document Type	Document Name	Begin Date	Expiration Date	Owner	Status
  	Diversity Certificate	bb	10/14/2024	11/29/2024	CM Member	✖
  	Diversity Certificate	bb	10/17/2024	11/20/2024	Hatim OCM	✖

2 Record(s) 

### Documents

Add Documents

Att.	Document Type	Document Name	Begin Date	Expiration Date	Owner	Status
<b>15</b>   	Supplier Continuity Survey		10/14/2024		CM Member	✖
  	Non Disclosure Agreement		11/4/2024	11/4/2025	CM Member	✖

15. Select the '+' icon beside the required document

# Supplier document management

## 3. Supplier Document Management - Documents (2/2)

Edit document : Documents 🖨️ 📄 ✕

**Save** **Save & Close** **Close** **Archive**

**16** Document Type\* **17** Document Name **18** Begin Date\* **19** Document\* **20** Expiration Date **21** Save & Close

Description

Document Type\*  Status

Document Name  Begin Date\*

Document\*  Expiration Date

Link to external document

Document's owner: OCM Hatim Validity

Follow up

Notification Date

Date Archived

Request Date

Comments

Add a comment here

16. Select the document type
17. Enter a name in the 'Document Name' field
18. Select the begin date
19. Select the 'Click or drag to add a file' and select a file from your local computer
20. Select the expiration date
21. Select 'Save & Close'

# Supplier Banking Information

## 4. P2P information - Add Banking Information (1/2)

Company Info Nadia (CANADA / Ontario / North York)

Save Close Reject Supplier Onboarding Request Submit for Activation

Catalog Access

P2P Information

Remittance Contact

Name

Role

Email

Telephone

Fax

Name

Role

Email

Telephone

Fax

Banking Information

+ Add Banking Information

0 Record(s)

1. Select the 'P2P Information' tab
2. Select '+Add Banking Information'

# Supplier Banking Information

## 4. P2P information - Add Banking Information (2/2)

Banking Information for Nadia

**Save** 5

### Bank Information

Country\* Currency 1

CANADA CAD

Bank Name\* 2 BIC/SWIFT

Bank Branch Address

Clearance Agency

### Account Information

Account Information Details

Click or Drag to add a file

Intermediary Bank 3

Name on Account\* 3

Routing Number Account Number 4

1. Select the currency field and select the currency corresponding to the assigned currency for this scenario
2. Enter a name in the 'Bank Name' field
3. Enter a name in the 'Name on Account' field
4. Enter a valid 'Account Number' in the field
5. Enter a valid 'Transit number' in the field
6. Select 'Save'

# Supplier Banking Information

## 5. Qualifications

Phase of UAT | Celestica | General Info | Sourcing | Contracts | Hatim O.

< ⌂ ☆ Company Info Nadia (CANADA / Ontario / North York) Search

Save | Reject Supplier Onboarding Request | Submit for Activation

Note that at least one blocking alert exists on this object. [Click here to review it.](#)

**Additional Information**

Regions Served definitions

Supplier Categories

Comment (Supplier)

Customer References

Add Reference

**Questionnaires**

Campaign	Progress	Status	Date
General Supplier Information	100%	Review in progress	10/3/2024

1 Record(s)

1. Select the 'Qualifications' tab
2. Add some countries to 'Regions Served definitions'
3. Add some categories to 'Supplier categories'
4. Enter a comment in the 'Comment (Supplier)' field
5. Select 'Submit for Activation'

# Thank You

