Supplier Training Material

Lyse Ivalua Portal

2025

Lyse

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Lyse

01. Supplier self registration

Lyse

Supplier self registration (1 of 3)

Self registration (1/3)

This section is only applicable if you have received an invitation from Lyse to register as a supplier for their procurement portal

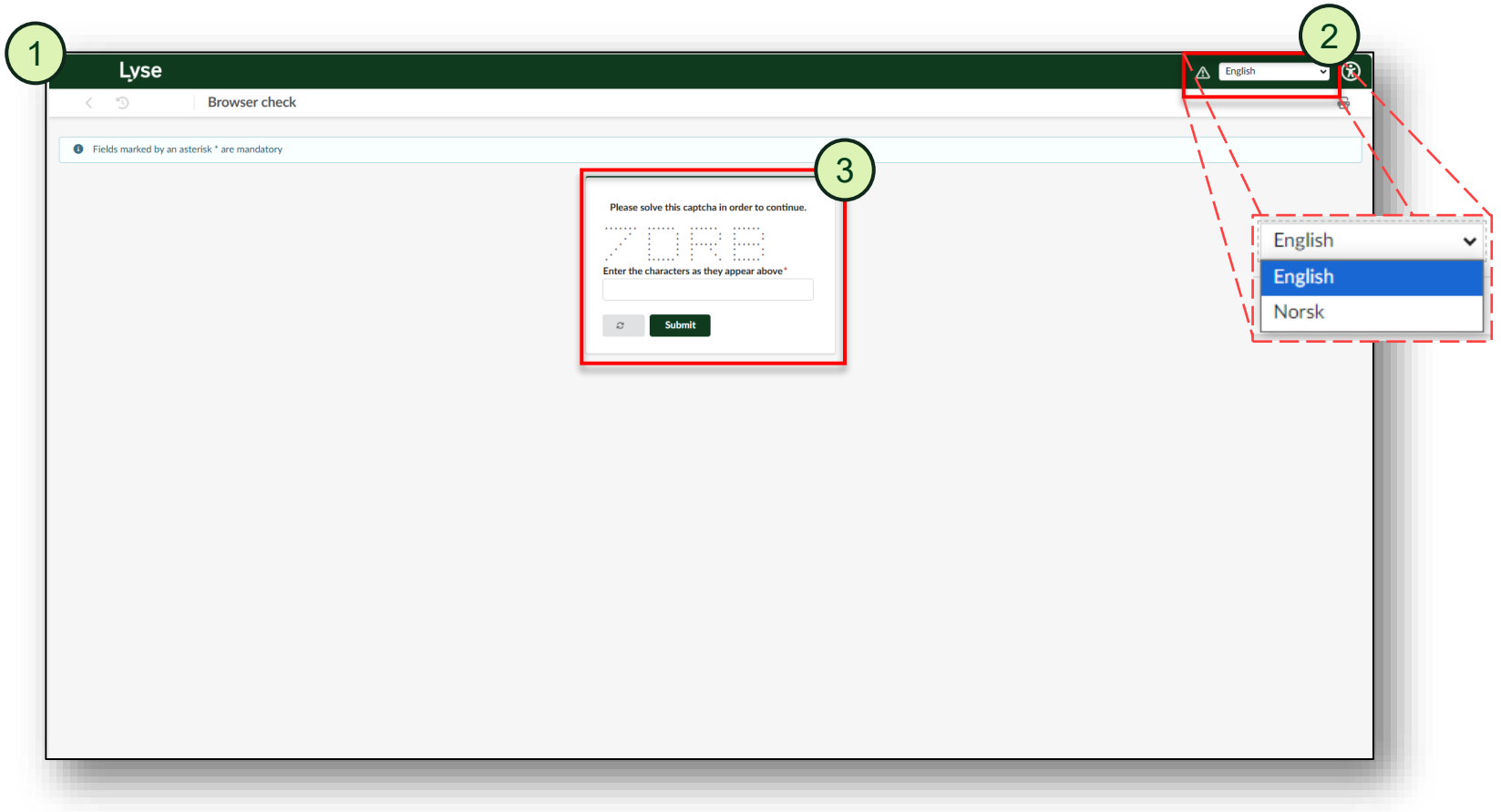
1 First, go to the Lyse Ivalua Portal, following the link received from your respective Lyse contact

2 You can change the language by clicking on the language dropdown menu in the top right corner of the screen.

Note: This document is provided in English to ensure it is applicable to all Lyse suppliers. However, Norwegian will be used as the default system language within the Lyse Ivalua Portal

3 Enter the character as they appear in the captcha and click the **Submit** button

Note: Does not need to be in capital letters



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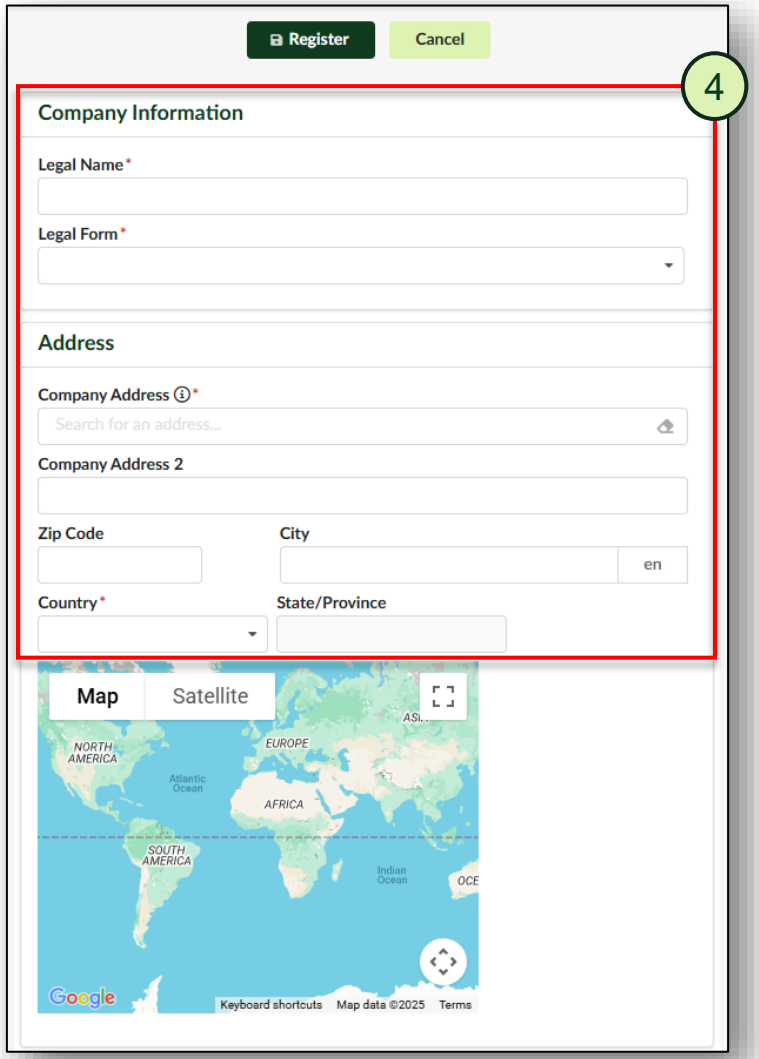
Supplier self registration (2 of 3)

Self registration (2/3)

4 Under the **Company Information** section and **Address**, complete the mandatory fields which are marked with a red asterisk (*)

5 Fill in the **Tax ID Number and DUNS** (not mandatory) under Help us identify your company

Please note that the fields displayed will vary depending on the country in which your organization is registered. If you select Norway as the country, the "Tax ID Number" field will be replaced by "Organization Number". Additionally, if you change the system language in Ivalua to Norwegian, "Tax ID Number" will appear as "Organisasjonsnummer"



Lyse

Supplier self registration (3 of 3)

Self registration (3/3)

6 Under the **Contact Information** section, fill in the mandatory fields and create a password

Note: The email address and password will be what you use to log in to the solution in the future

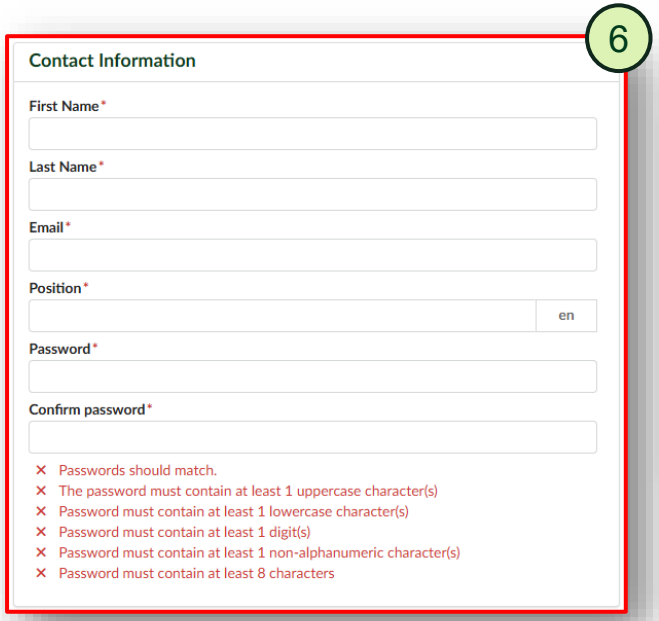
7 **First time registration? Please tell us more:**

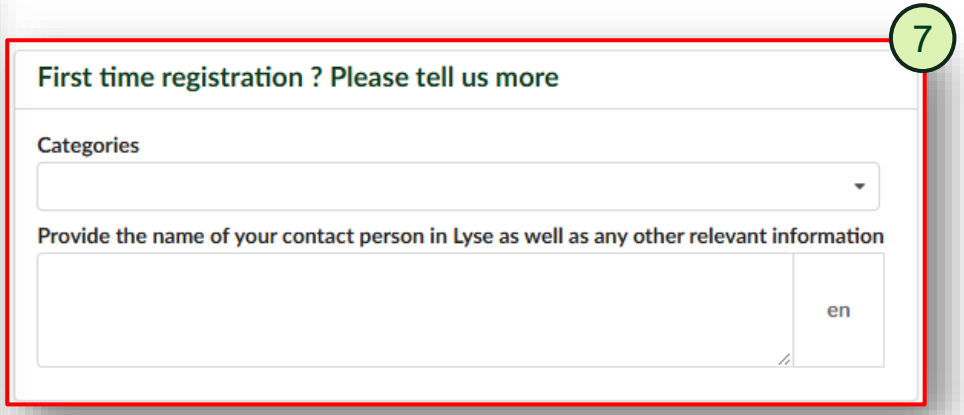
- Select the category (or categories) that best describe your business and what you offer
- In the text field below, please provide the name of you contact person in Lyse as well as any other information you find relevant

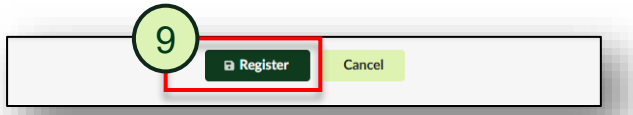
8 Enter the character as they appear in the captcha

9 Click **Register** at the top of the screen

Once the registration has been reviewed by Lyse, you will get an email notification when the registration has been approved, or if additional information is required







Lyse

02. Accessing and navigating the Lyse Ivalua Portal

Lyse

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Lyse

02.01 Logging in for the first time

Lyse

First time login (1 of 2)

First time login

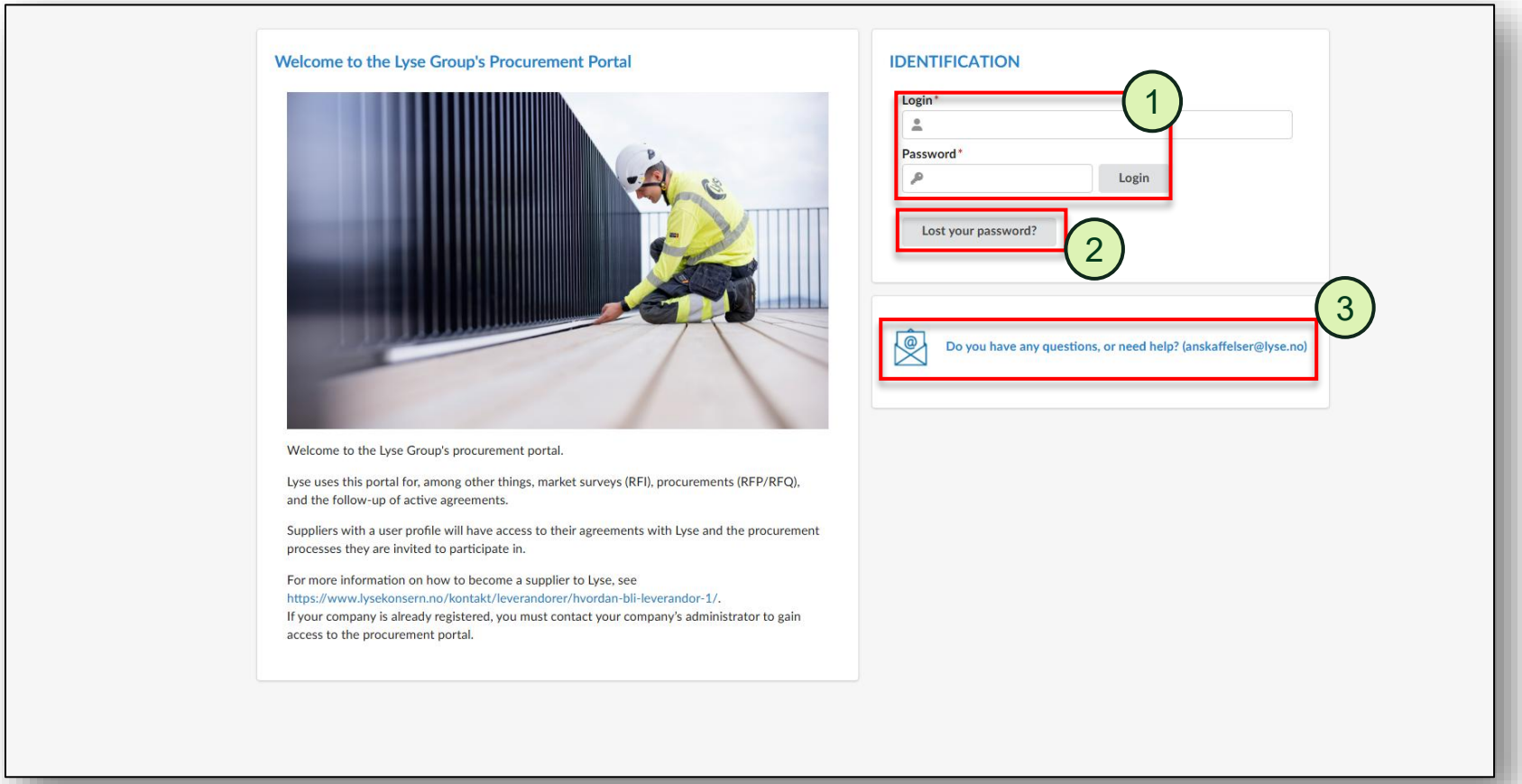
The login page for Lyses procurement portal

1 To login, enter your login credentials and password in the **Identification**, and click on the **Login** button

2 If you have forgotten your password, click on the **Lost your password?** Button

3 If you do not have the login and password details, please contact the person at your company who is responsible for your access to Lyses procurement portal

If you do not know this, or the person has left the company, contact Lyse through the email: **anskaffelser@lyse.no**, providing your company's name, address and VAT number

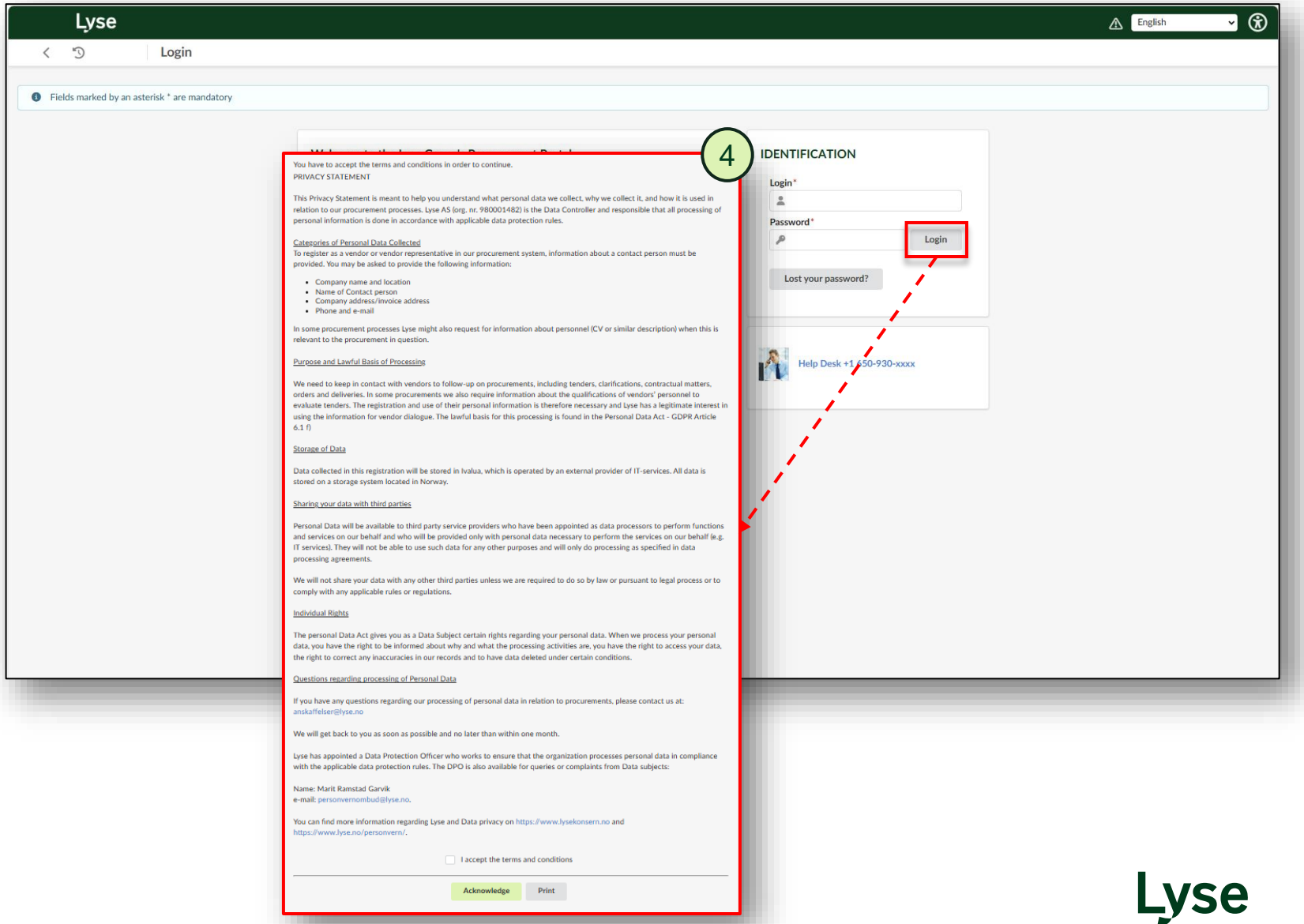


Lyse

First time login (2 of 2)

First time login

4 The first time you login to the system, you have to accept Lyses general terms of use for the system, by clicking in the “I accept the terms and conditions” check box, and clicking on the **Acknowledge** button, before you can access the system



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02.02 The home page

Lyse

The home page

Home page overview

The home page provides a clear view of ongoing activities and gives you an overview of the most relevant information

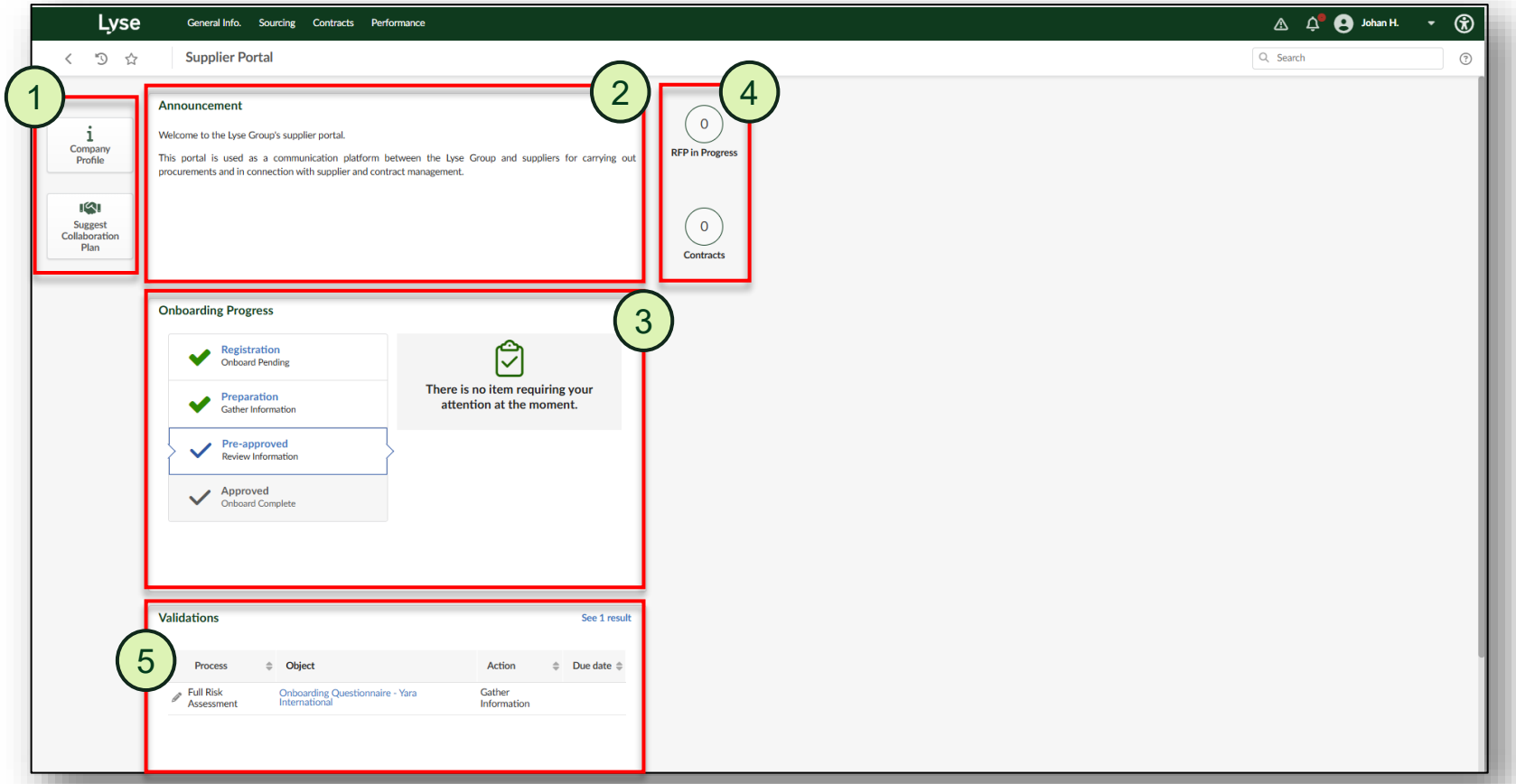
1 **Quick access**
The quick access buttons can be used to directly access relevant actions, such as your own company profile, or proposing a collaboration plan

2 **Announcement**
Displays useful information, links or announcements from Lyse

3 **Onboarding Process**
Displays the supplier registration process and relevant items requiring attention by the supplier

4 **Indicators**
Displays the number of active proposals or contracts you are involved in. Also provides a direct link to it

5 **Validations**
Displays the list of tasks that the supplier is asked to respond to within the system



Lyse

02.03 Company information

Lyse

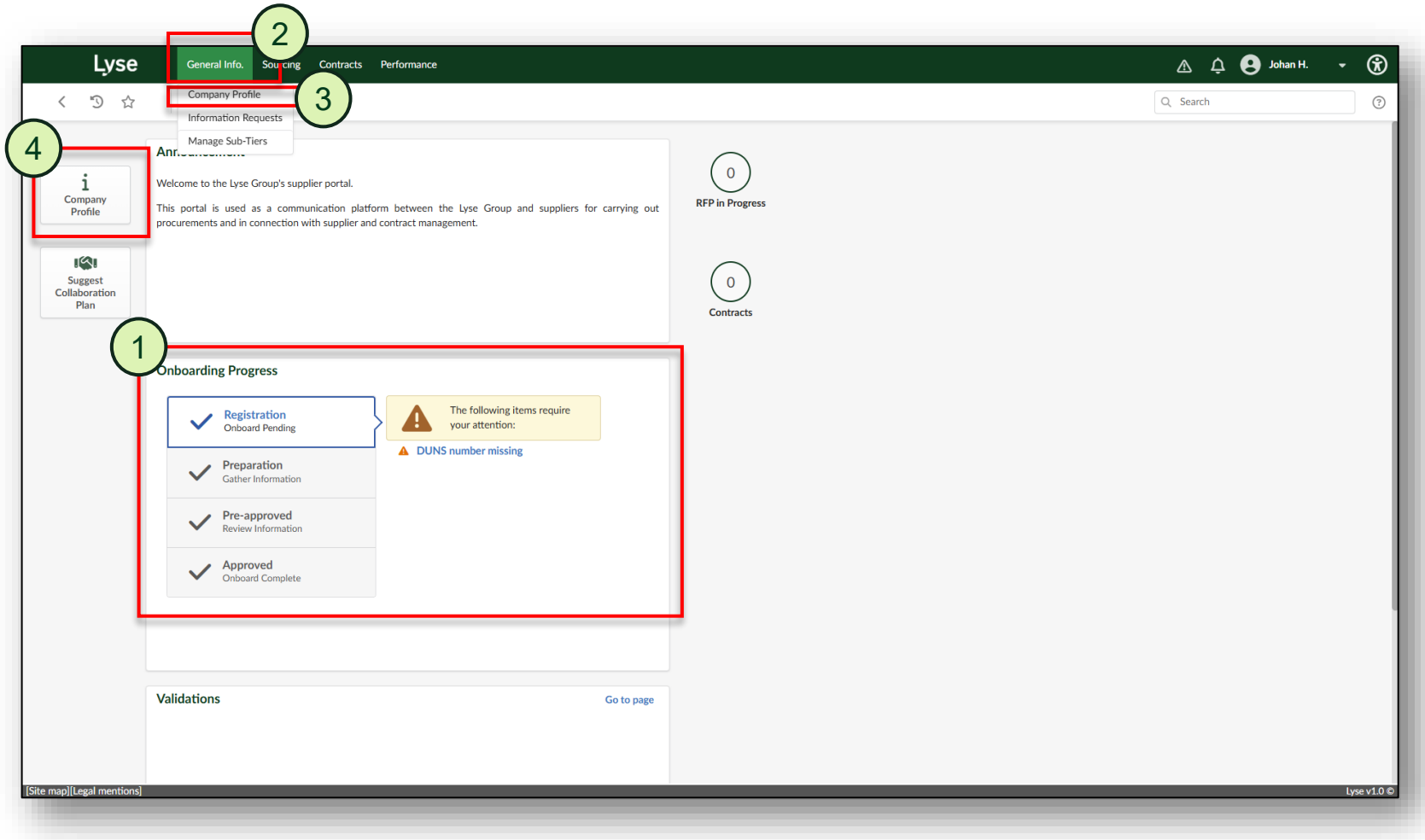
Company information (1 of 2)

Company Profile: Company Information

1. Once you have registered and logged in, you will find yourself in the Supplier Portal

   Here, the **Onboarding Progress** bar shows the status of your enrolment as a supplier, tracking your progress from registration to becoming an active and approved supplier

   Further on in the onboarding process you must register the necessary information about you company
2. Go to **General Info** on top of the page
3. Click on **Company Profile**
4. Or access it by clicking in the **Company Profile** quick access button



Lyse

Company information (2 of 2)

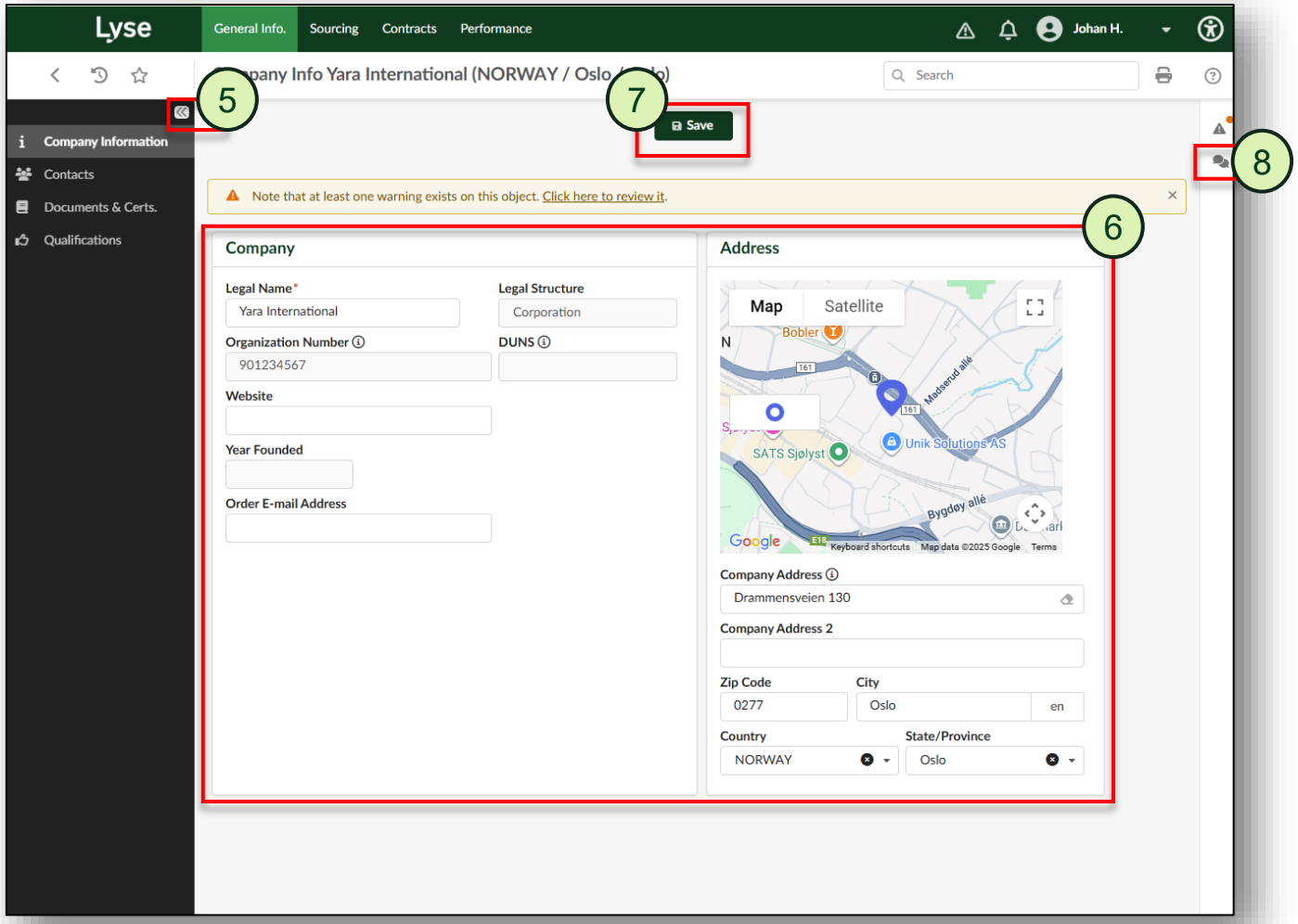
Company Profile: Company Information

5 The navigation tabs on the left side of the screen can be expanded/minimized by pressing the **>>** or **<<** icon, respectively

6 You can edit the information under the **Company and Address** sections, if needed

7 Click **Save** after making the necessary changes

8 If you want to communicate with Lyse, click on the **Speech bubble** icon at the right side of the Company Information screen.



Lyse

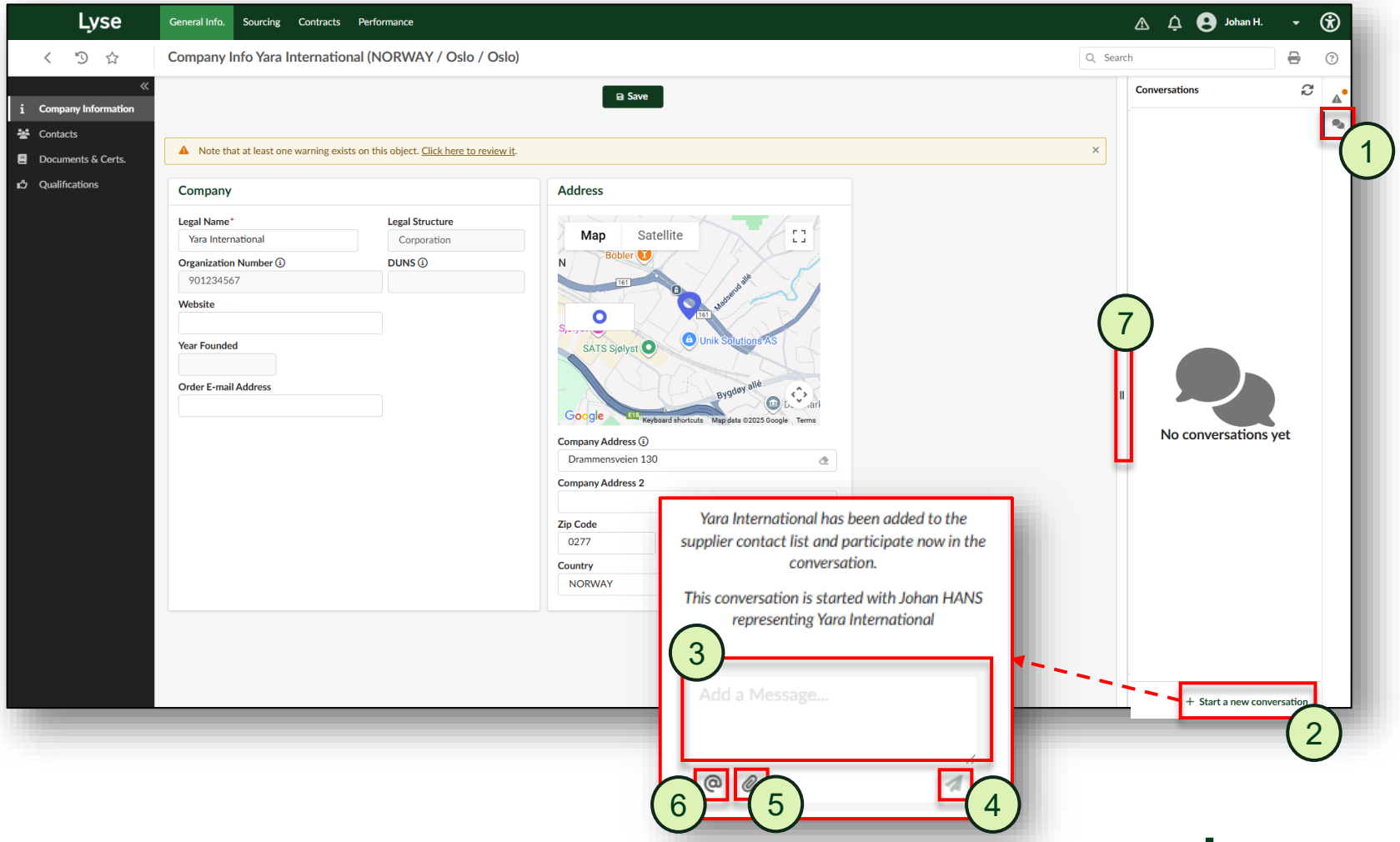
02.04 Communicating with Lyse

Lyse

Communicating with Lyse

Company Profile: Communicating with Lyse

1. Lyses Ivalua solution allows you to communicate with Lyse through a chat function. You can show or hide the **Conversation** window by clicking the **speech bubble** icon
2. Click on **+ Start a new conversation** to begin a chat
3. Type your message in the message box
4. Click on the **Paper plane** icon to send the message. Your Lyse contacts listed in the **Contacts** tab will be notified that you have sent a message
5. You can attach a file by clicking on the **paperclip** icon
6. You can **@** mention a user, as long as the user is listed in the **Contacts** tab
7. The size of the window can be altered by dragging the left line of the window



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02.05 Adding internal contacts

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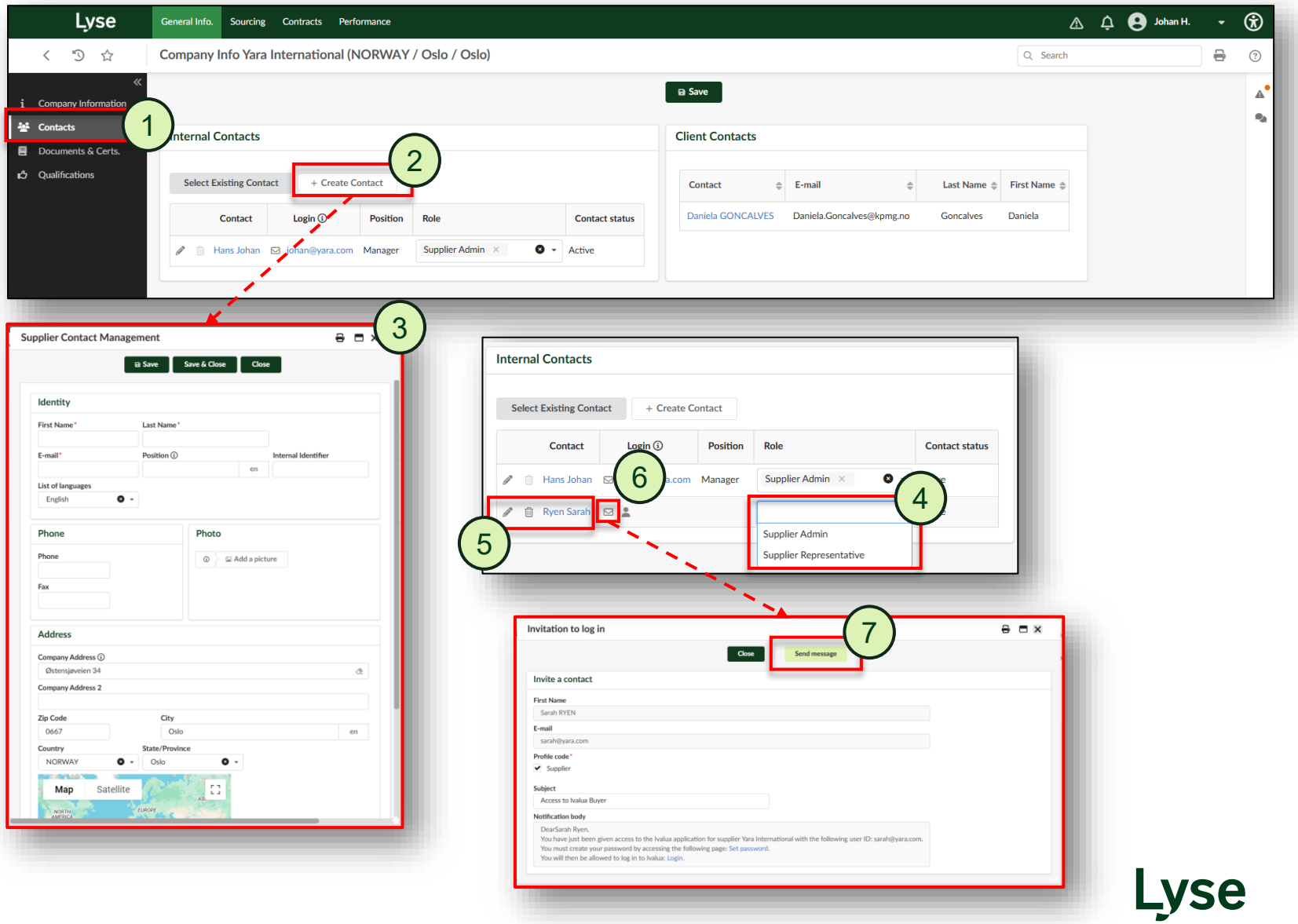
Adding internal contacts

Company Profile: Adding internal contacts

Lyses Ivalua portal allows you to add additional users, who can get access to the portal and participate in proposals

1. Navigate to the **Contacts** tab on the left to add contacts to the sourcing project
2. Click **+ Create Contact** to add a new contract
3. Fill in the mandatory fields and click **Save & Close**
4. You can select a **role** to the contact by clicking on the drop-down list
   - **Supplier Admin** = The main contact person, responsible for key tasks such as responding to questionnaires, managing exceptions and collaboration plans (mandatory role)
   - **Supplier Representative** = Supports supplier activities and communication
5. The new user is now added to the Internal Contacts list
6. To invite the new user to the platform, click on the envelope icon
7. Check the information and message to be sent in the Invitation and click on **Send message**



Lyse

02.06 Adding documents and certifications

Lyse

Adding documents and certifications

Company Profile: Adding documents and certifications

Upload relevant documents here to make them accessible to Lyse

1 Navigate to the **Documents & Certs.** tab on the left

2 You have the option to upload any necessary documents and certifications under the following categories: Legal, Sustainability, Other Certifications and Other Documents

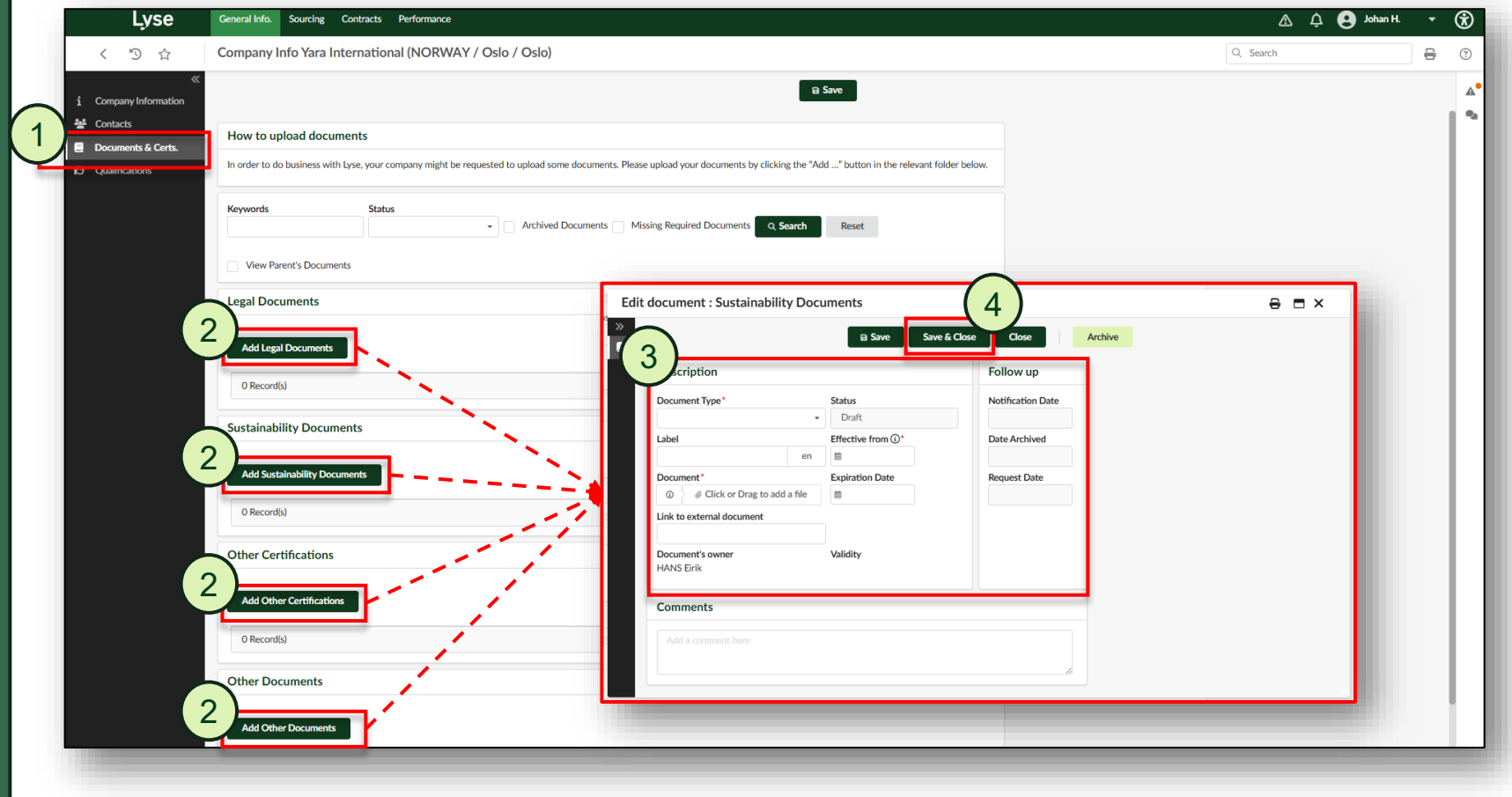
3 Fill in the mandatory fields and add the certification or document in the **add a file**

Begin Date is mandatory

For some document types, an **Expiration Date** is set automatically

For other types, you can enter an **Expiration Date** manually

4 Click **Save & Close**



Lyse

02.07 Adding qualification

Lyse

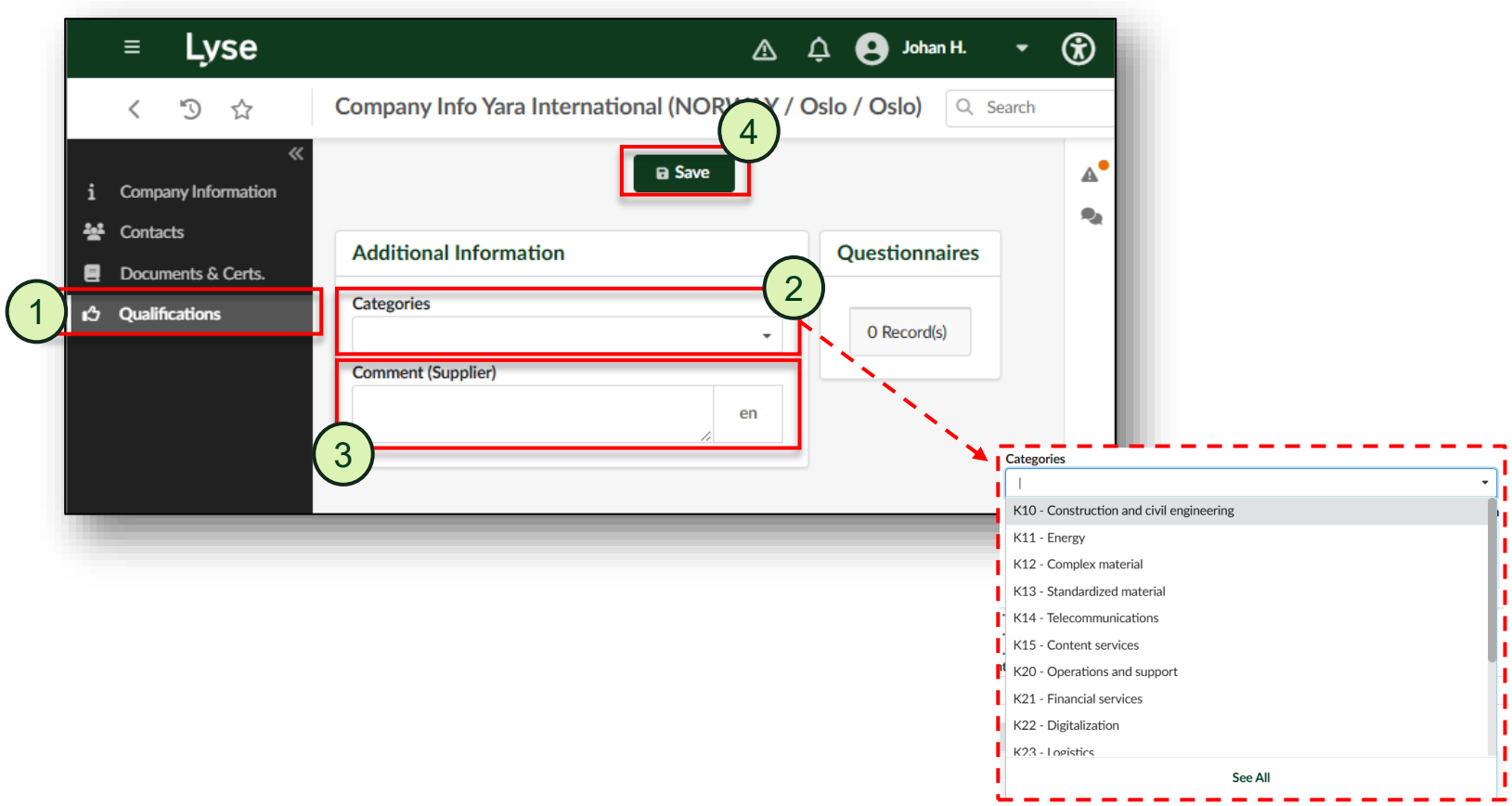
Adding qualification

Company Profile: Adding qualification

Qualifications allow you to specify the categories you consider your organization eligible for

1. Click on **Qualifications** tab
2. Under **Additional Information**, select one or more **Categories**
3. Add a **Comment** if required
4. Click **Save**

Note: The added qualification(s) needs to be approved by Lyse before the qualification can become valid



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02.08 The onboarding process

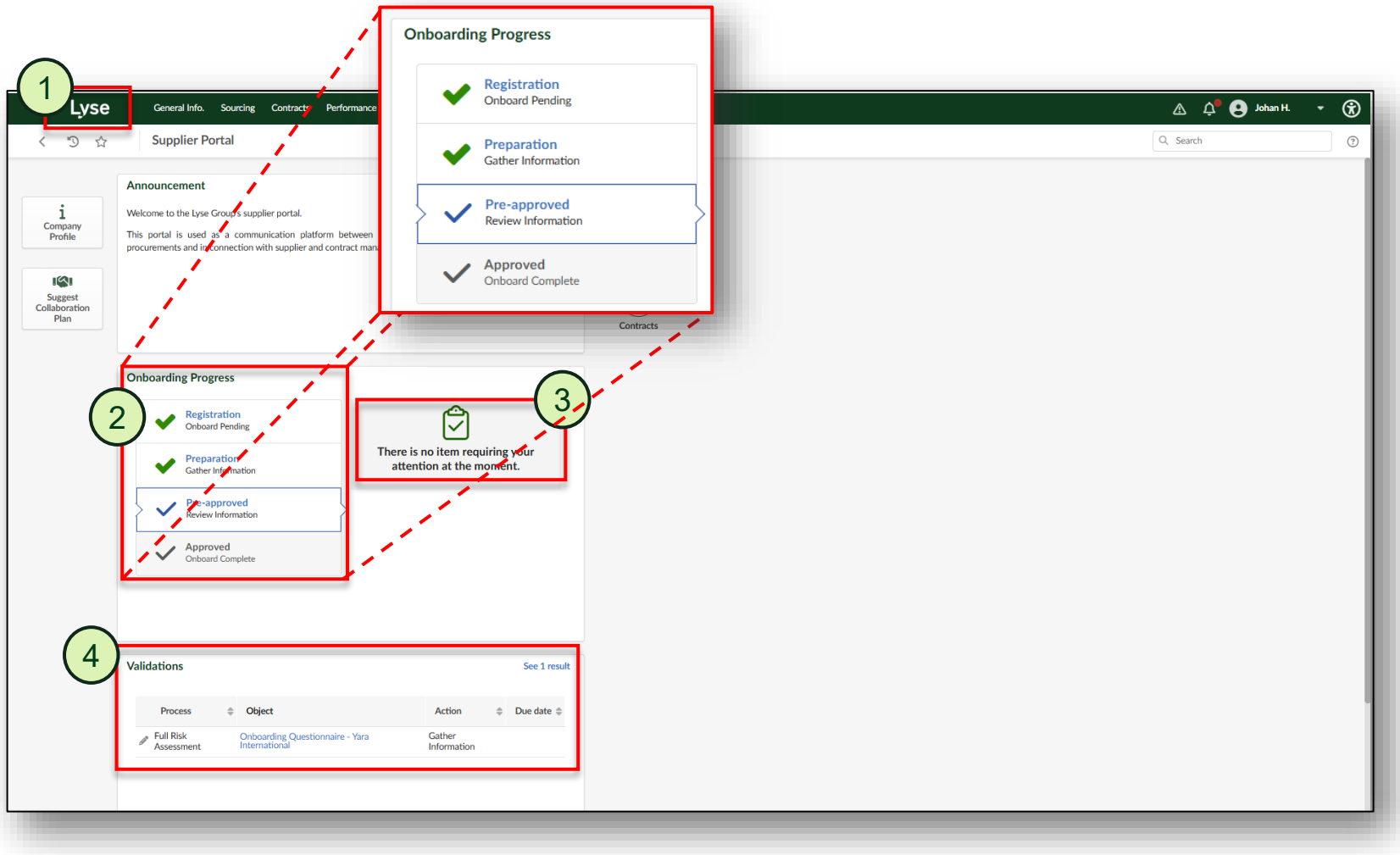
Lyse

The onboarding process (1/2)

Company Profile: The onboarding process

1. Click on the **Lyse logo** on the left top side to navigate back to the homepage
2. Once your supplier registration is complete and Lyse has initiated the onboarding process, Lyse will collect additional information to approve you as a supplier
3. If there are items that require your attention as part of the onboarding process, these will be clearly displayed
4. Any validations, such as completion of the onboarding questionnaire, will be listed in the **Validations** section

   If there are any tasks listed, the supplier is required to complete them and submit them back to Lyse in order to complete the onboarding process

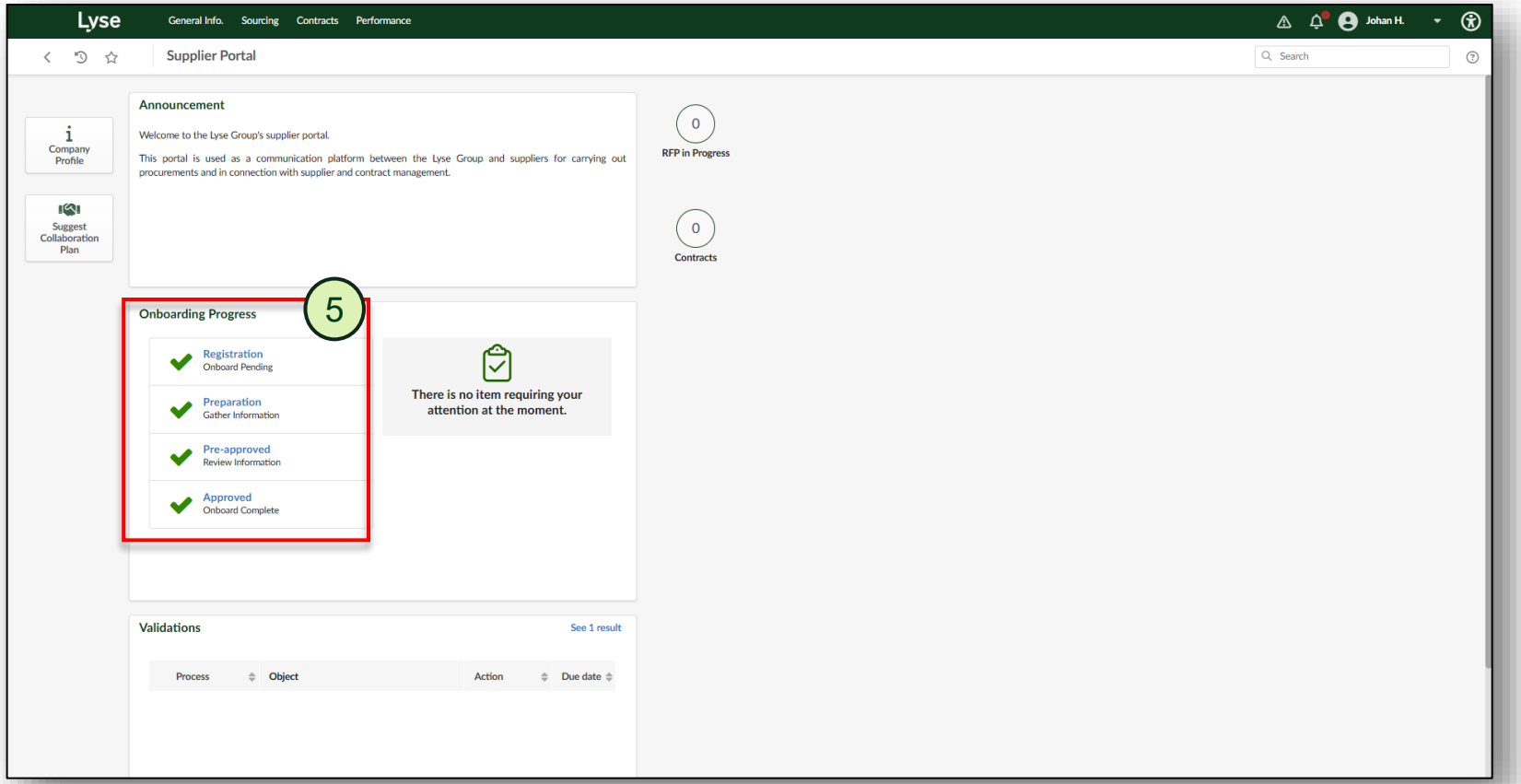


Lyse

The onboarding process (2/2)

Company Profile: The onboarding process

5 Once Lyse has approved your onboarding, the onboarding process is complete, and your supplier register is now considered as an active supplier. At this point, the Onboarding Progress table will advance to the final stage



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03. Sourcing/RFx Events

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Lyse

03.01 New Sourcing/RFx Events and accessing these

Lyse

New Sourcing/RFx Events and Accessing these

Sourcing/RFx Events: New Sourcing/RFx Events and accessing these

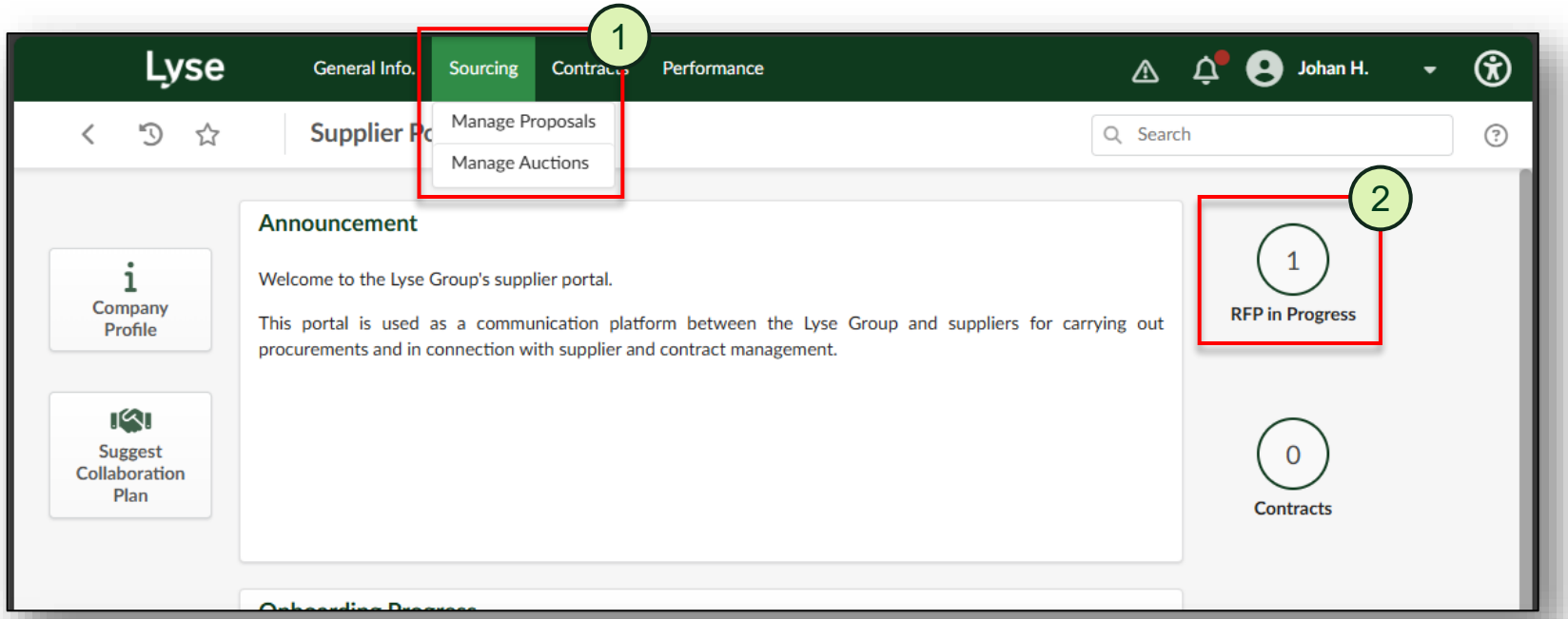
If you, or another registered user from your company, is invited by Lyse to participate in a sourcing event, you will receive a notification through email

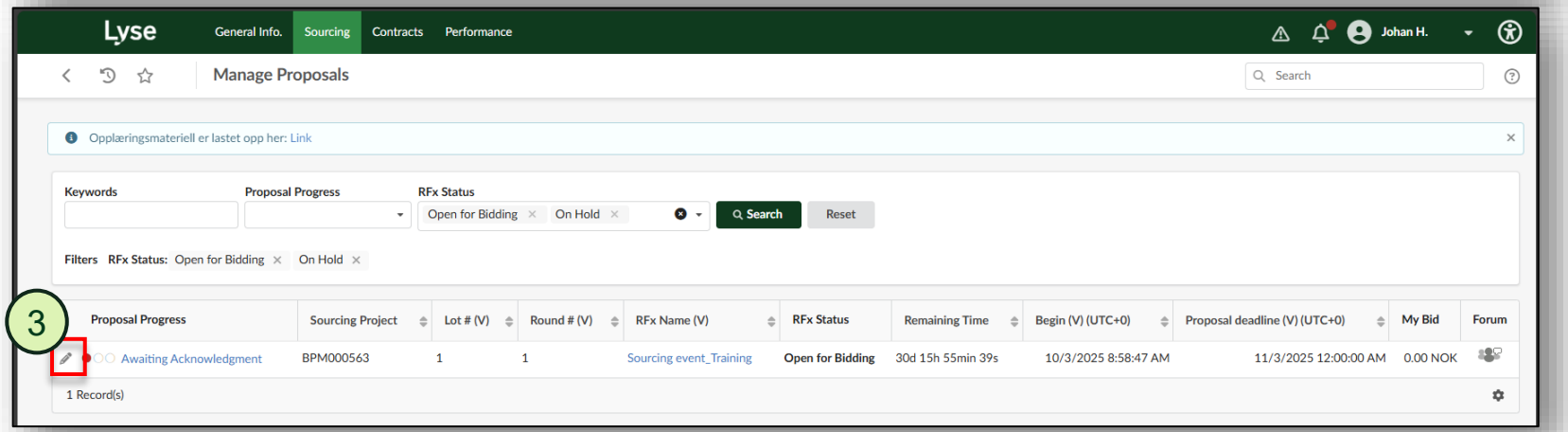
The email contains a link to the proposal

There are two ways of accessing the list of active and new proposals from the homepage:

1. Go to **Sourcing** in the main menu and click on **Manage Proposals**
2. Or click on the **RFP in Progress** button
3. To access a proposal, click on the **Pencil** icon to the left of the proposal

Any new proposal will have a RED traffic light, and the text **Awaiting acknowledgment**





Lyse

03.02 Responding to Sourcing/RFx Events

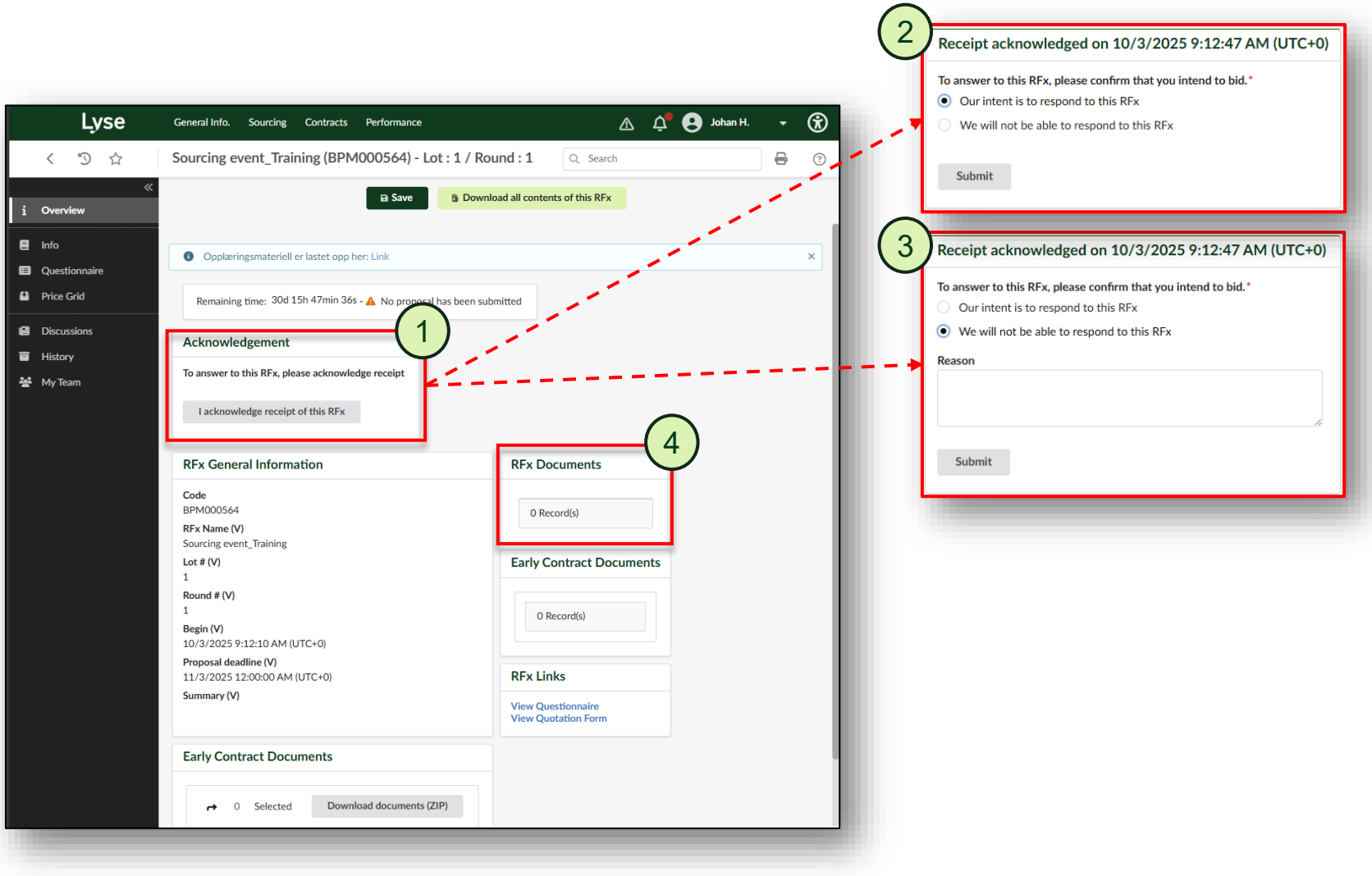
Lyse

Responding to sourcing/RFx Events (1 of 5)

Sourcing/RFx events:
Respond to and submit a proposal

When you have opened the new Sourcing/RFx event, you need to acknowledge if you plan to submit a bid or if you do not plan to submit a bid

1. Click on the button **I acknowledge receipt of this RFx**
2. Select that your **intent is to respond to the RFx** and click on the **Submit** button
3. If you select that you do not intend to bid, you are asked to provide a reason – this is optional and will be visible for Lyse
4. **<u>Important:</u> RFx documents will be attached to sourcing events.** Suppliers are expected to review all relevant documents thoroughly before submitting a proposal



Lyse

Responding to sourcing/RFx Events (2 of 5)

Sourcing/RFx events: Respond to and submit a proposal

In most Sourcing or RFx events, suppliers will be required to respond by uploading their proposal documents as part of the event

These documents should contain all necessary information, responses, and supporting materials requested in the RFx

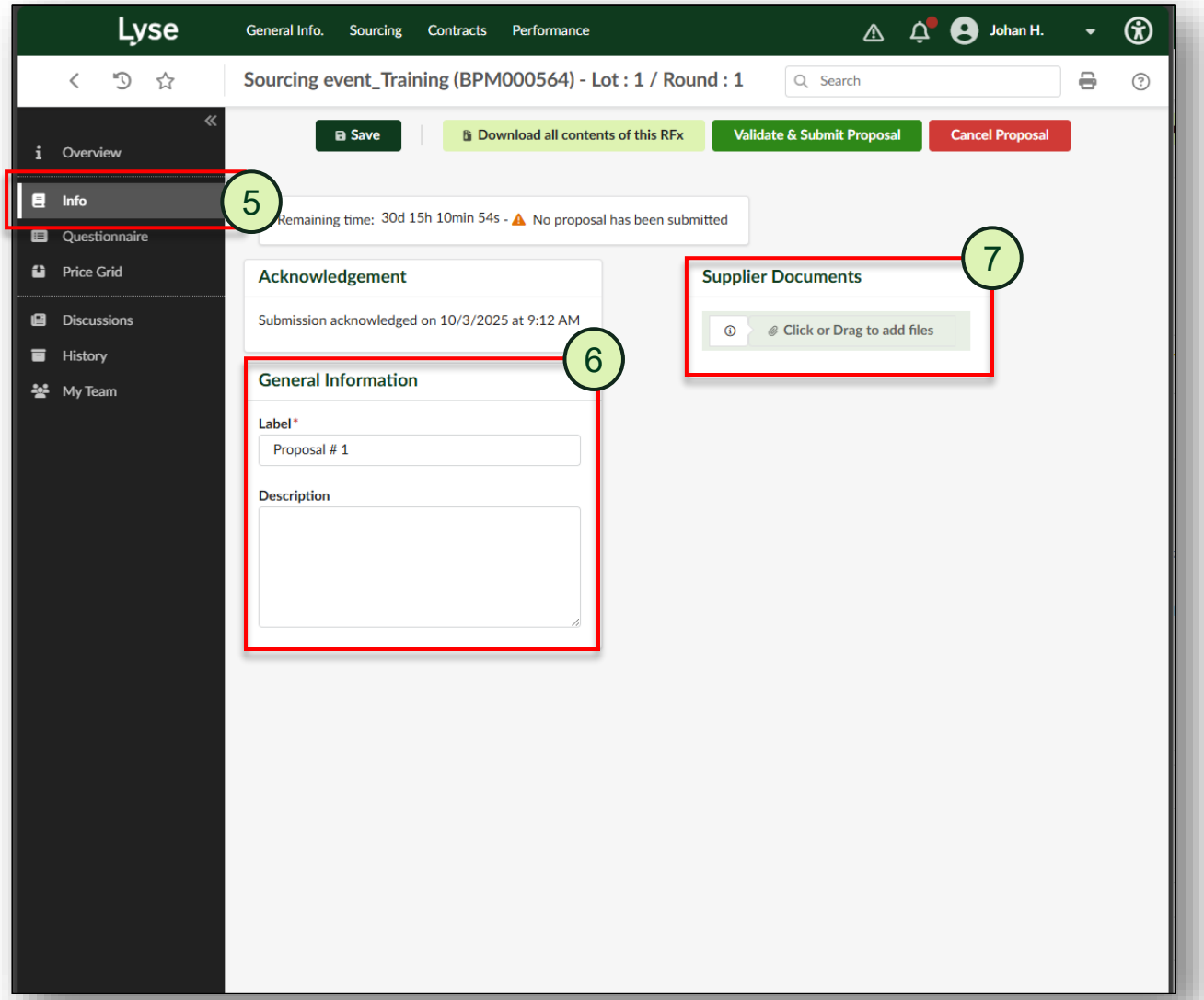
5 Navigate to the **Info** tab on the left

6 **General Information:**

- You can give your proposal a **Label** (title/name) and
- write a description for the proposal

Note: The label and description will be visible to Lyse

7 Any documents you want to include in your proposal needs to be added in the **Supplier Documents** section unless they are uploaded when answering a questionnaire.



Lyse

Responding to sourcing/RFx Events (3 of 5)

Sourcing/RFx events: Respond to and submit a proposal

The proposal may include a questionnaire. If used, it is available in the tab on the left and must be answered as part of the proposal

Navigate to the Questionnaire tab to view and answer the questions

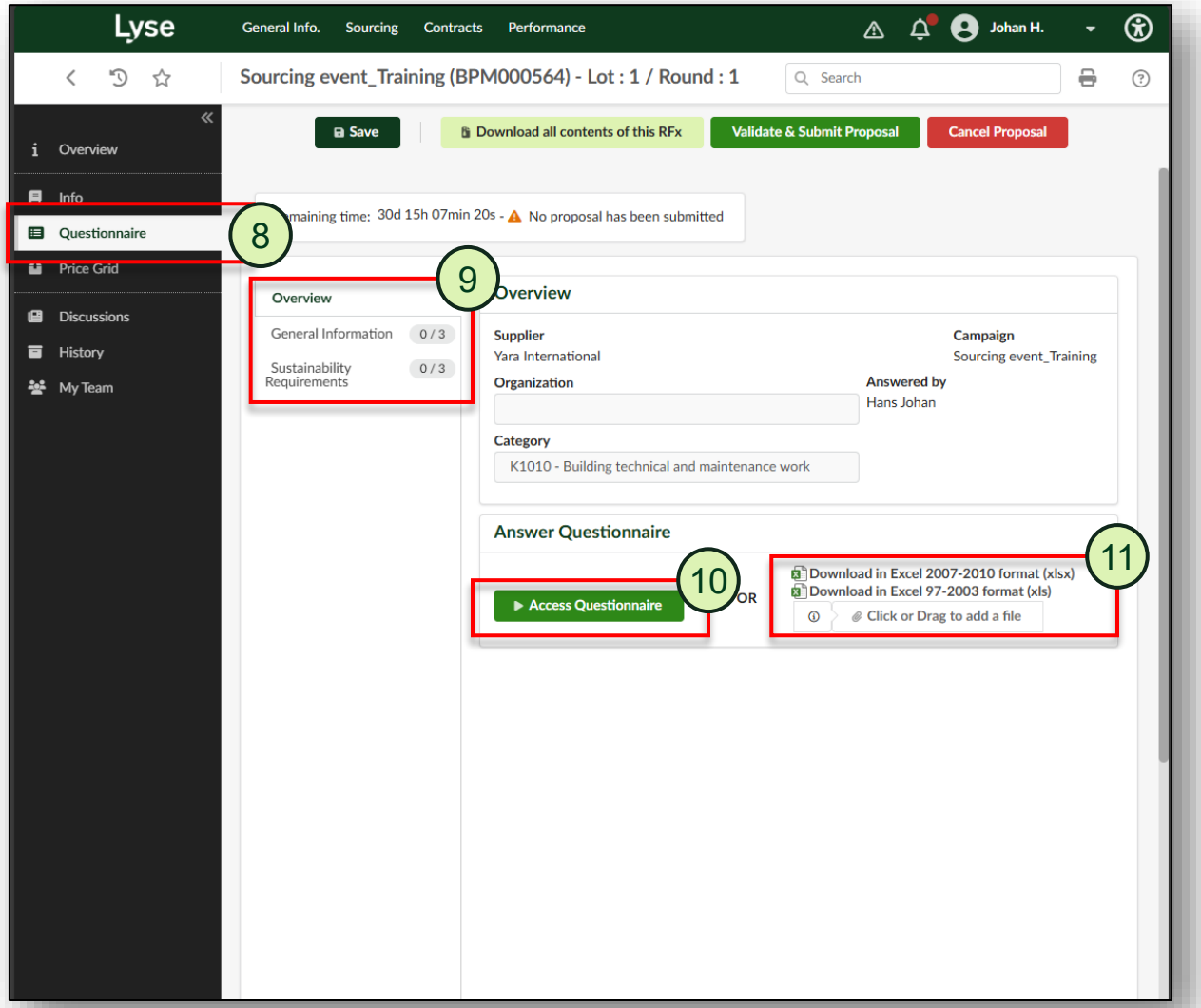
8 Navigate to **Questionnaire** tab on the left

9 The **Overview** shows the sections, and the number of questions in the questionnaire

Once you start answering the questions, the number before the "**/**" will change, indicating how many questions you have responded to in that section

10 Click **Access Questionnaire** or **the sections** on the left to answer the question(s) that is part of the bidding

11 You may also download the questionnaire to excel, complete your answers in excel and upload via the "Click and Drag to add file"



Lyse

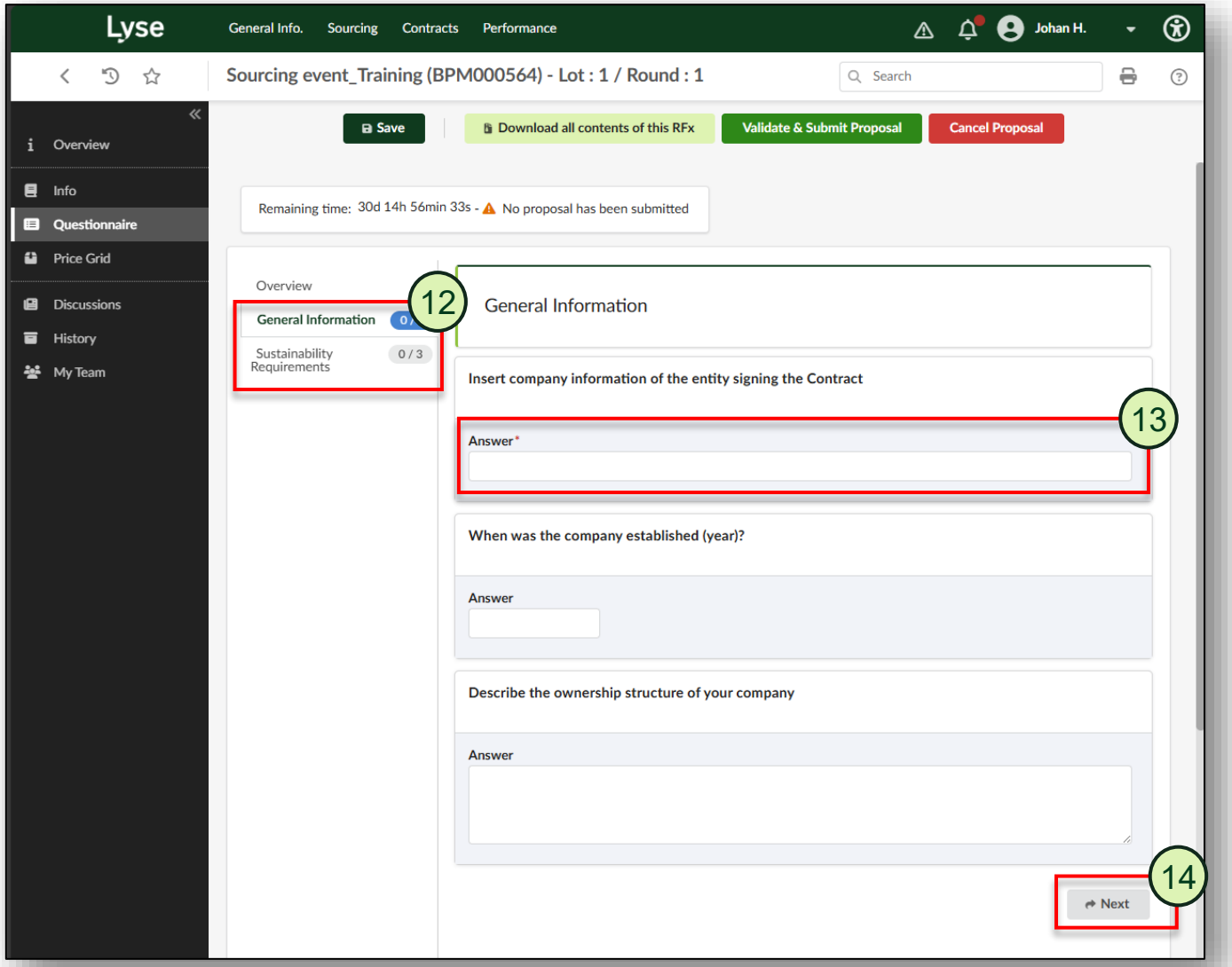
Responding to sourcing/RFx Events (4 of 5)

Sourcing/RFx events: Respond to and submit a proposal

12 You can navigate between the sections of the questionnaire in the tabs to the left of the questions

13 Mandatory questions are marked with a red asterisk *

14 The **Next** button at the bottom of the questionnaire will navigate you to the next section



Lyse

Responding to sourcing/RFx Events (5 of 5)

Sourcing/RFx events: Respond to and submit a proposal

The proposal may include a price grid. If used, it is available in the tab to the left and must be answered as part of the proposal

Navigate to the **Price Grid** tab to view and answer

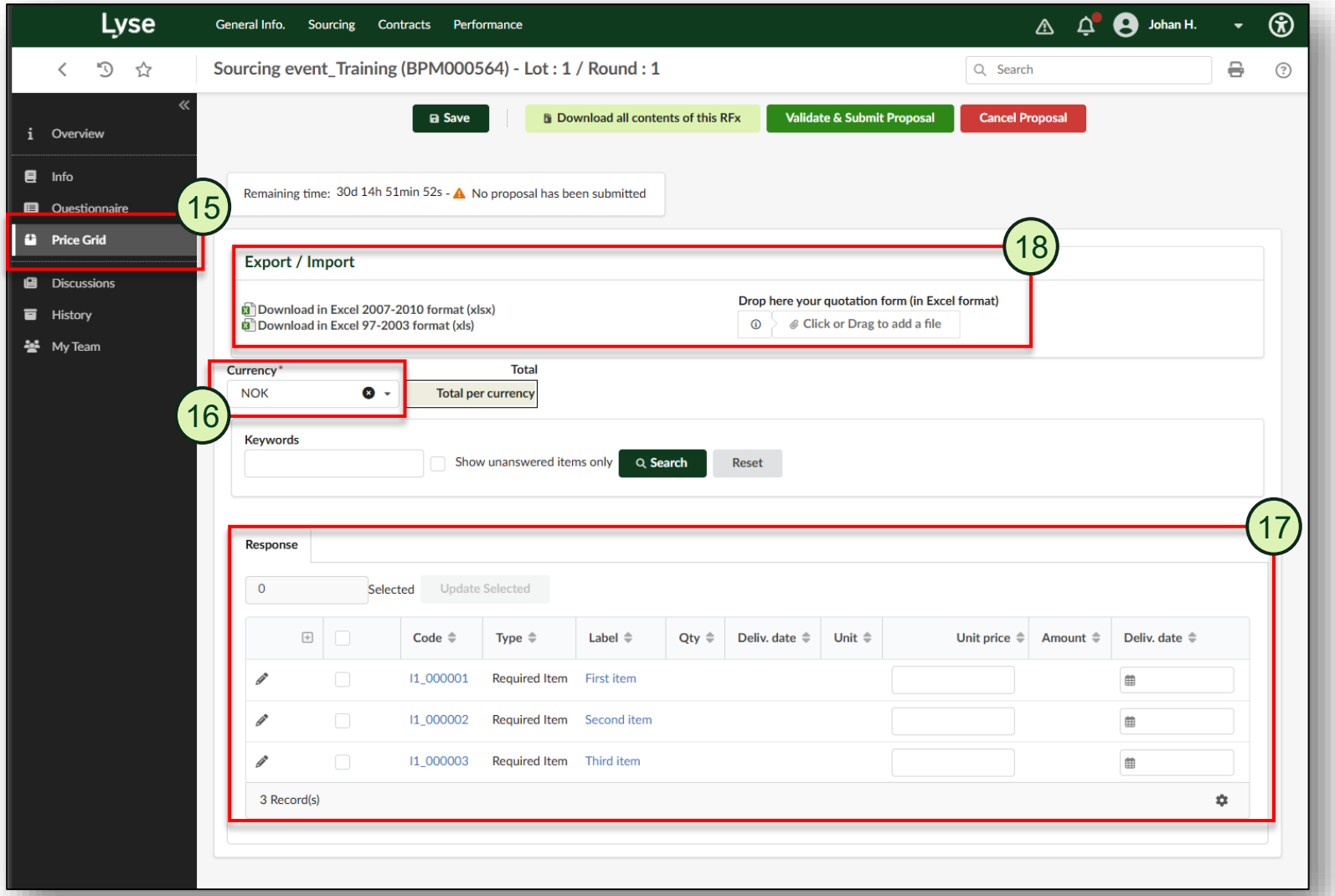
15 Navigate to the **Price Grid** tab on the left

16 The **Currency** field allows you to choose the currency you want to bid in

17 Under the Response section, enter the **Unit Price** and other input required, like the **Delivery date**

Note: be aware, the item price grid can vary, depending on the proposal setup.

18 You may download the item grid in excel format, complete your answer in excel, and upload via the “Drop your quotation form”



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03.03 Adding team members to a proposal

Lyse

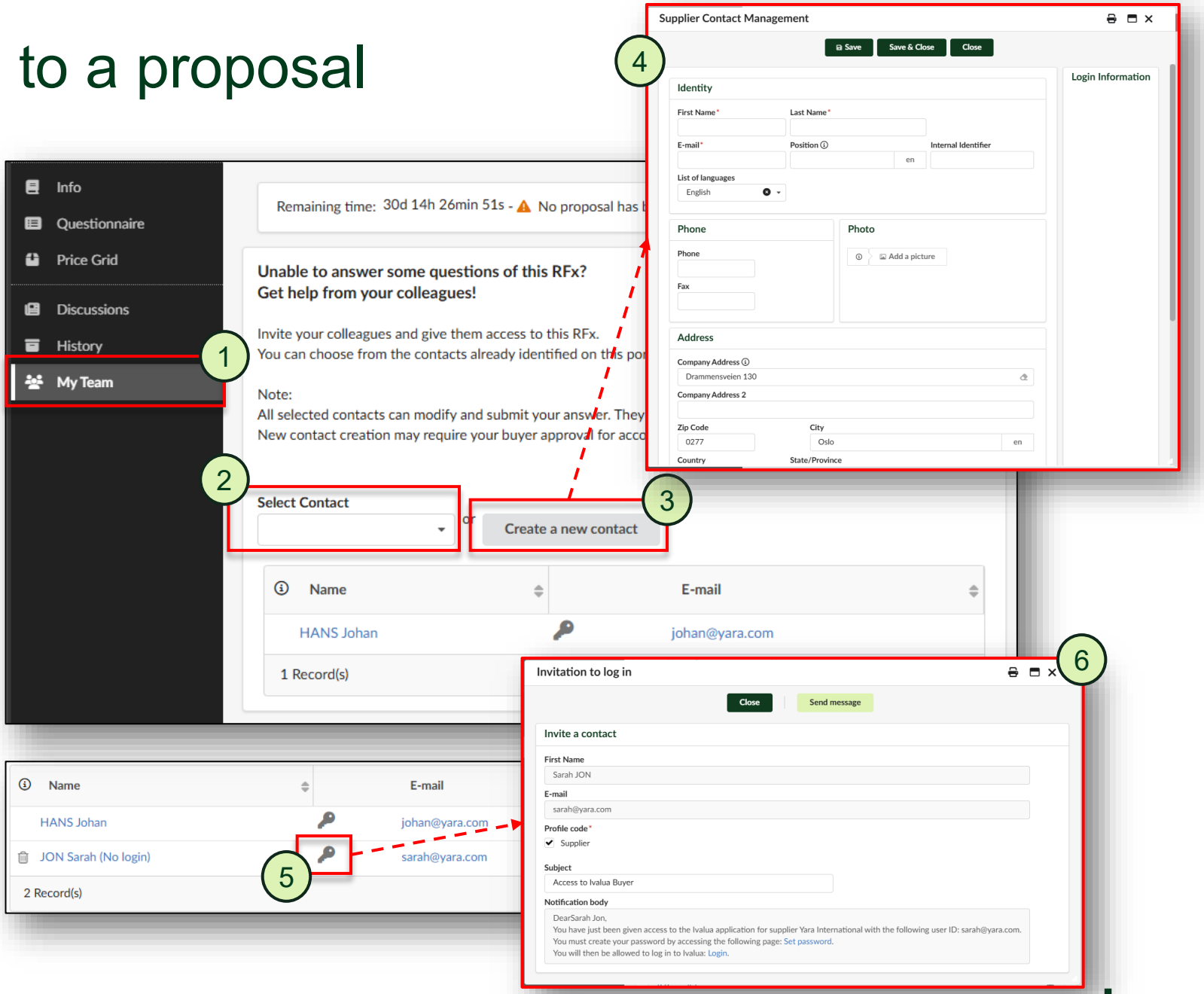
Adding team members to a proposal

Proposals: Adding team members to a proposal

1. Navigate to **My Team** tab on the left

   Note: *All the selected contacts can access the RFx, modify and submit the response to the proposal*
2. Select an existing contact by clicking on the **Select contact** dropdown
3. If you need to register a new user for your colleague, click on **Create a new contact**
4. **Complete the form** – as a minimum fill in the mandatory information (*), and click **Save & Close**
5. When adding a new colleague click on the **Key icon**
6. Click on **Send message** to send a login activation email to your colleague

   Your colleague will have to login, using the details in the email sent, to create a password, before they can log in



Lyse

03.04 Asking questions and requesting clarifications

Lyse

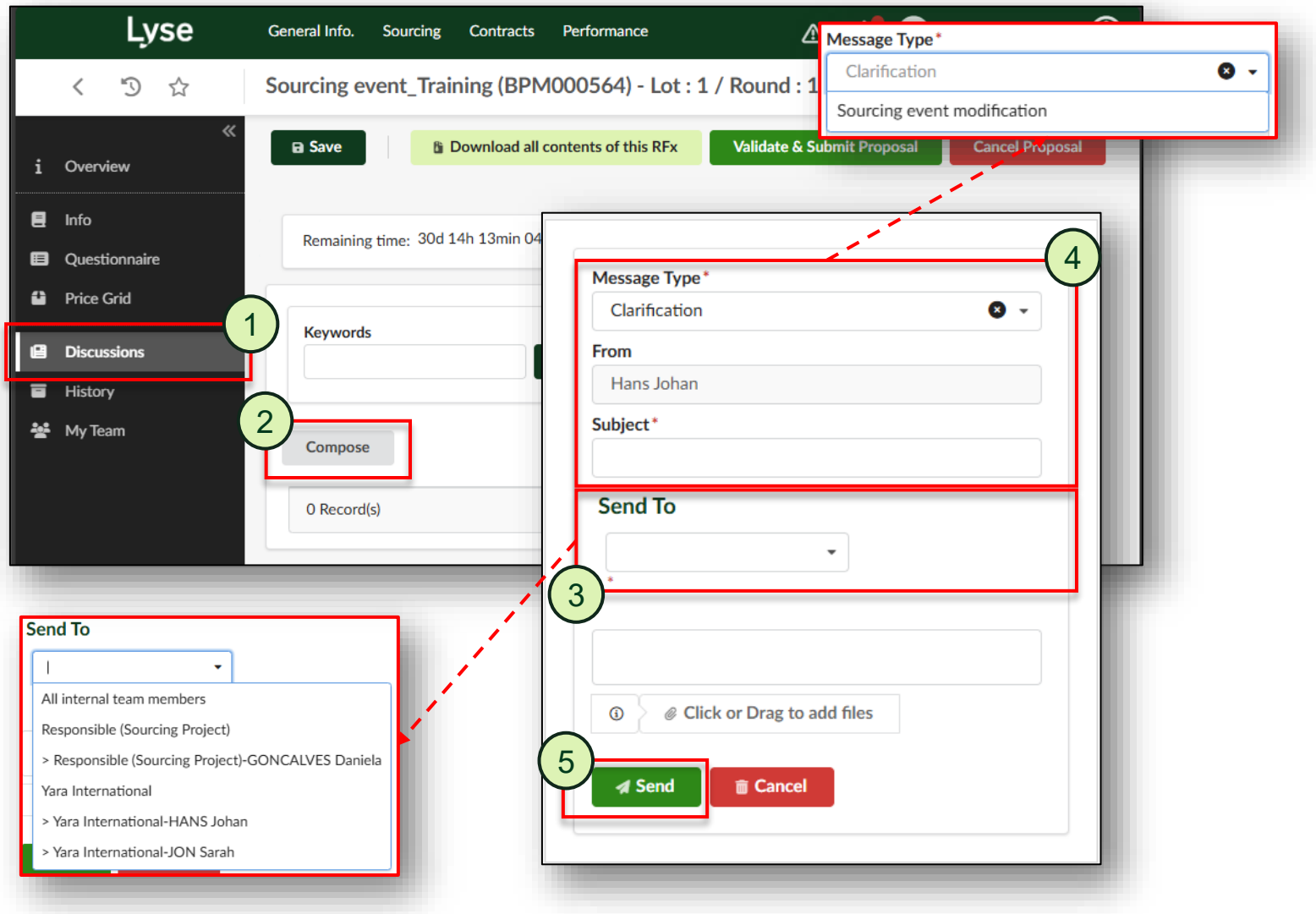
Ask questions and request clarifications

Proposals: Ask questions and request clarifications

1. **Navigate to the Discussions** tab on the left

   This section allows you to chat with Lyse regarding the sourcing event
2. Click the **Compose** button to create a new message
3. Make sure to always send your messages to Procurement Responsible (Sourcing Project)
4. Select a message type and fill in the subject and the message body

   You can also attach a file with the message
5. When the message is ready, click **Send**



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03.05 Submitting the Proposal

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Submitting the Proposal

Submitting the proposal: Respond to and submit a proposal

Before submitting your proposal, please make sure that you have included all the requested documentation as described

1 Click on **Validate & Submit Proposal** on top of the page to submit the proposal

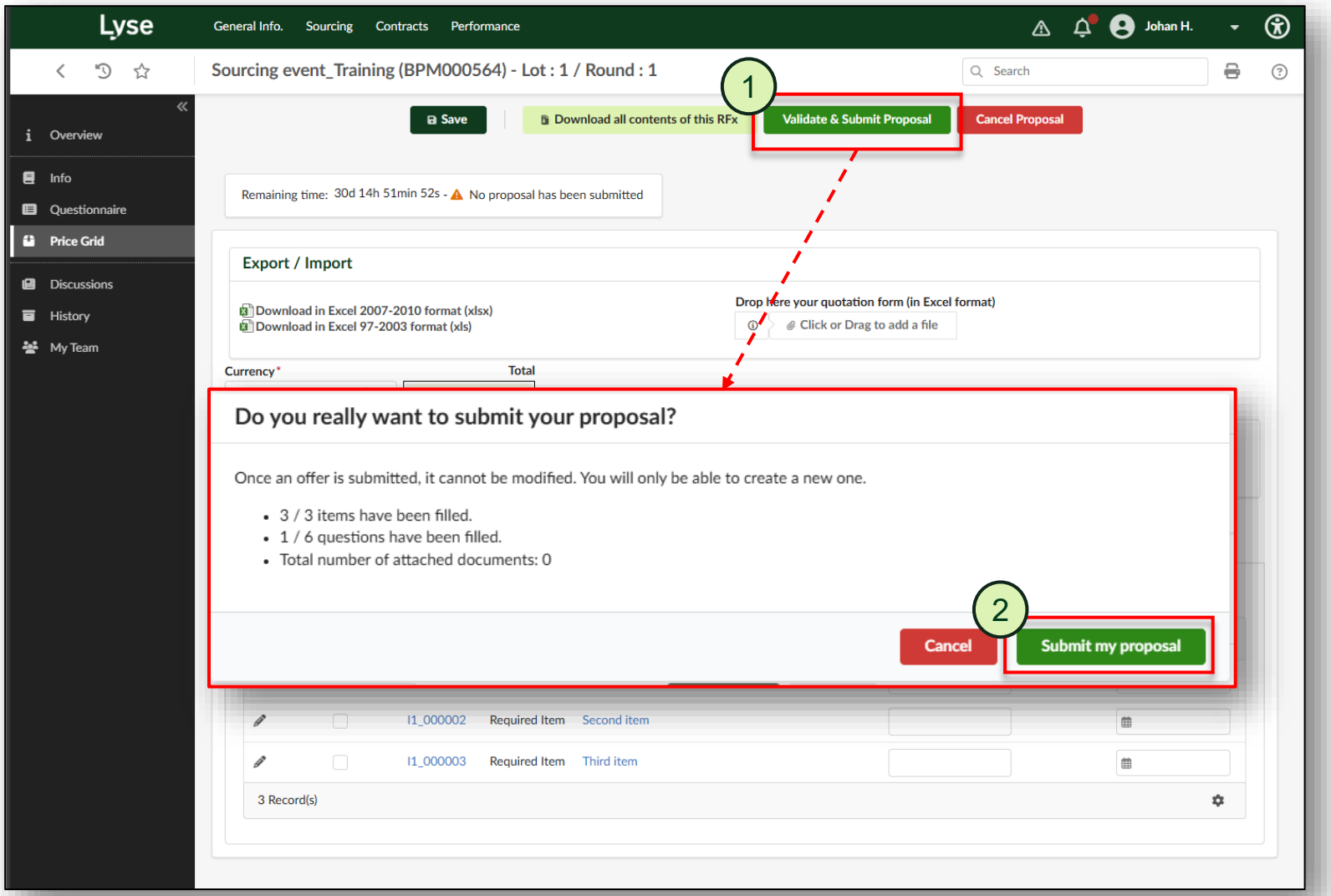
A summary of your response will be displayed in the popup

2 Click on **Submit my proposal**

If needed, you can cancel your proposal at any time prior to submission by clicking the **Cancel Proposal** button

After submitting your proposal you are no longer able to cancel or withdraw your proposal. If necessary you must instead replace and submit a new proposal.

Note: It is very important that you remember to validate & submit your proposal, as your proposal is not considered valid until this has happened



Lyse

03.06 Replace & submit new proposal

Lyse

Replace & submit new proposal

Proposals: Replace & submit new proposal

To revise a proposal, a new submission is required. Modifications to an already submitted proposal are not permitted

Note: once a proposal has been submitted, it cannot be withdrawn

1 On an existing proposal you have submitted:

Click on **Create a new proposal** on top of the page to replace the old proposal

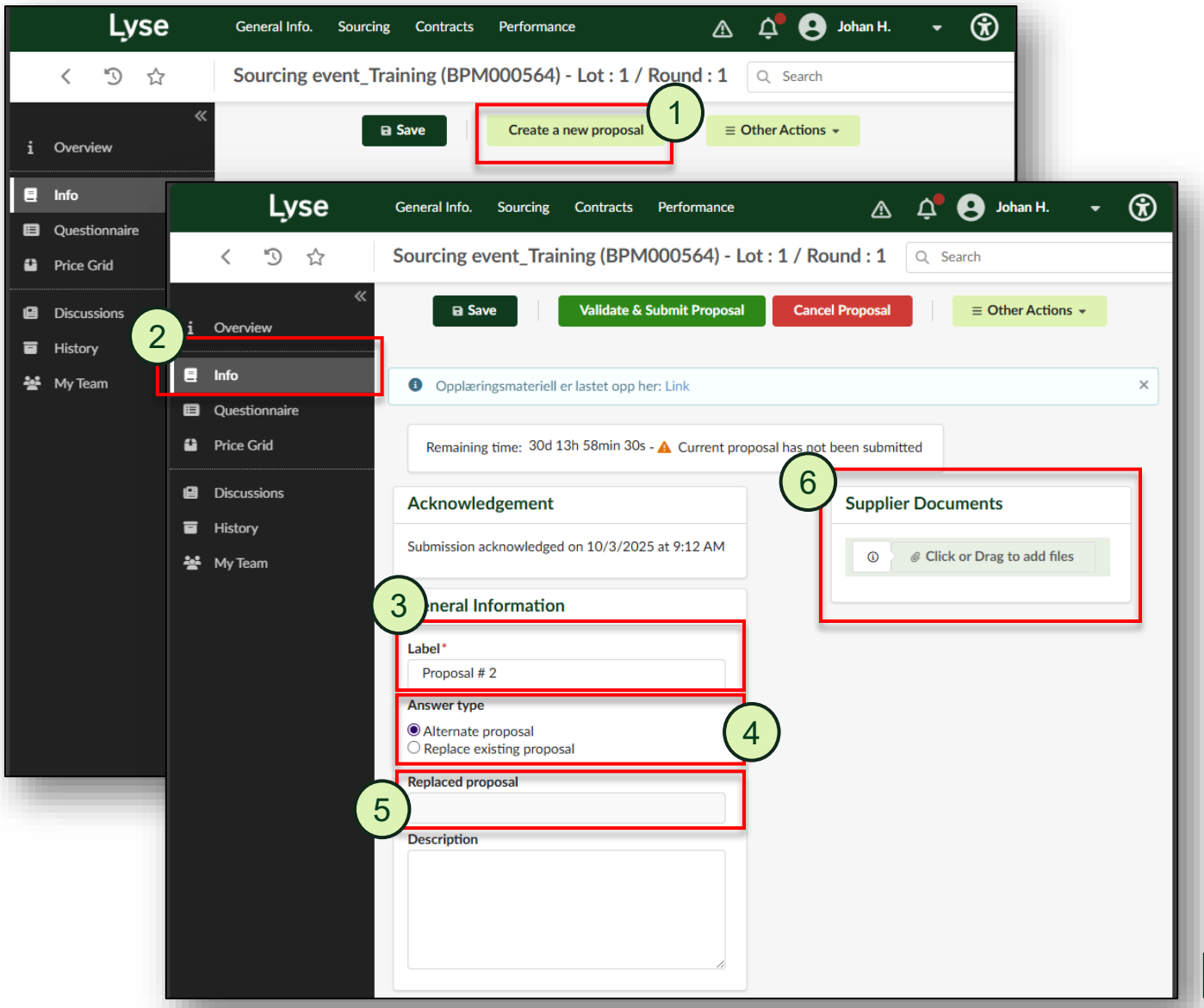
2 Go to the **Info** Tab

3 Give the proposal a new name

4 Select if you want to submit an **alternate proposal** or **replace existing proposal**

5 Select **Replace existing proposal** (if applicable)

6 Attach new relevant documents



Lyse

Replace & submit new proposal

Proposals: Replace & submit new proposal

You have the option to carry forward information from a previously submitted proposal, allowing you to reuse your previous responses and data in a new submission, or you can start completely fresh with a new proposal

7 To reuse a previous submitted proposal – click on **Other Actions**

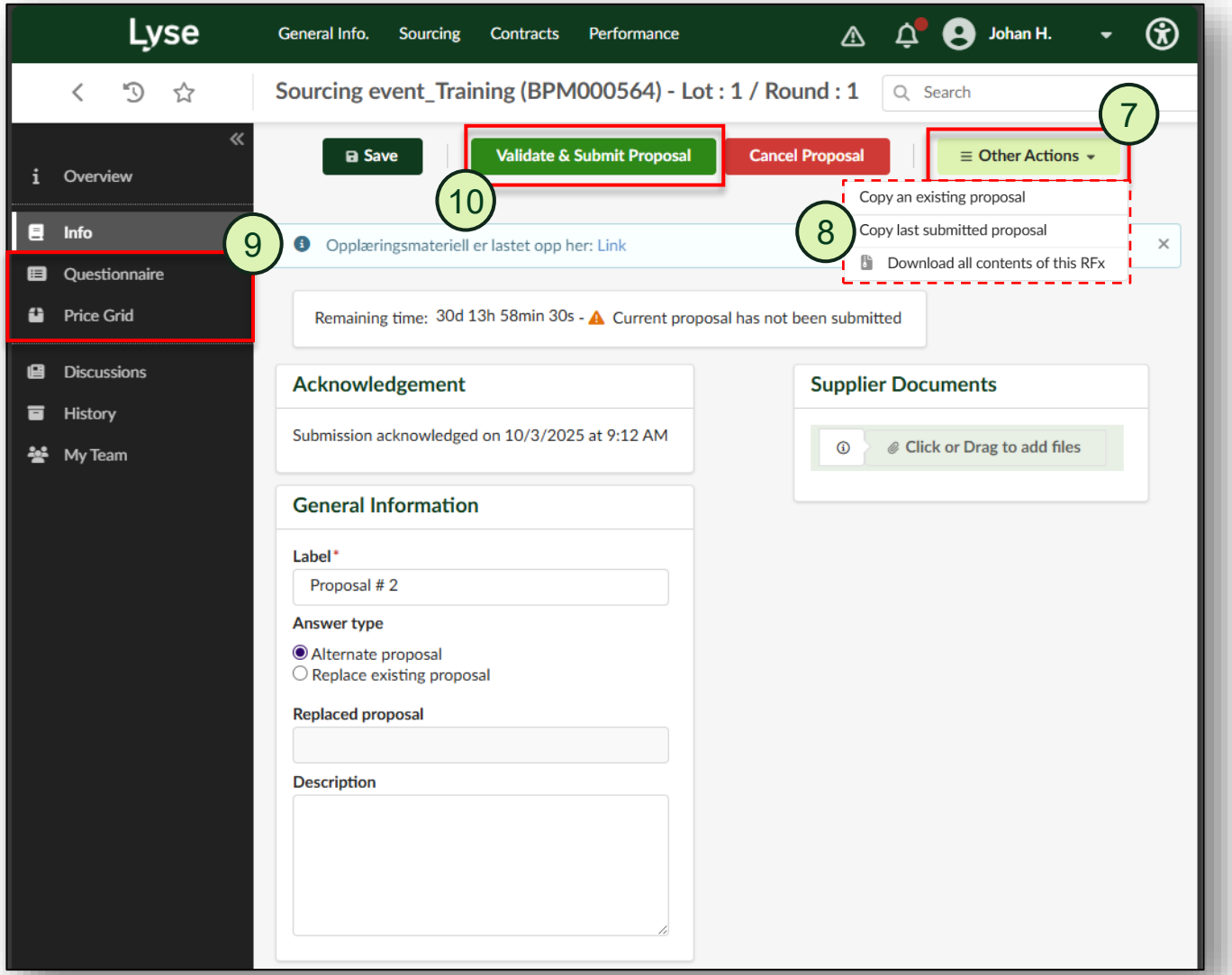
8 You have two options:

Copy information from any existing proposal (if multiple proposals have been submitted) or copy information from your most recently submitted proposal

9 Navigate to the Questionnaire and Price Grid tabs to provide the information of your new proposal (if applicable)

10 Click on **Validate & Submit Proposal**

Note: be aware, if you select a proposal to replace you need to ensure that you submit your new proposal – otherwise you will not submit any proposal



Lyse

03.07 Early Contract Documents

Lyse

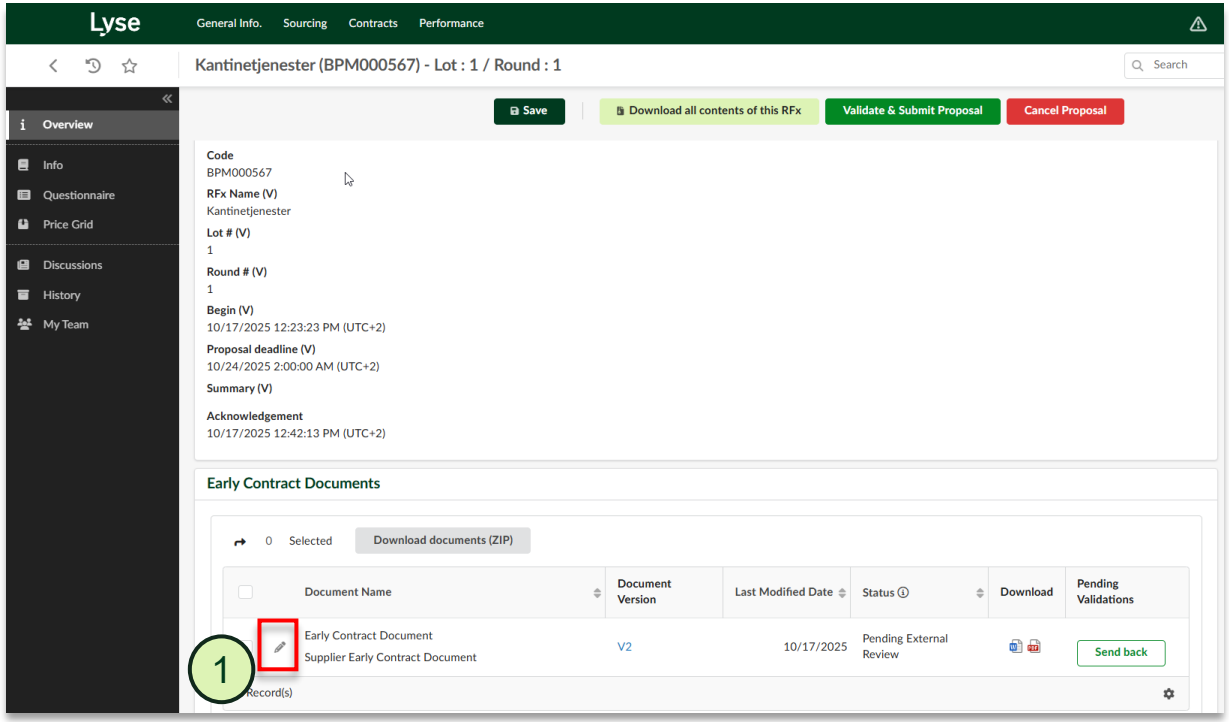
Early Contract Documents

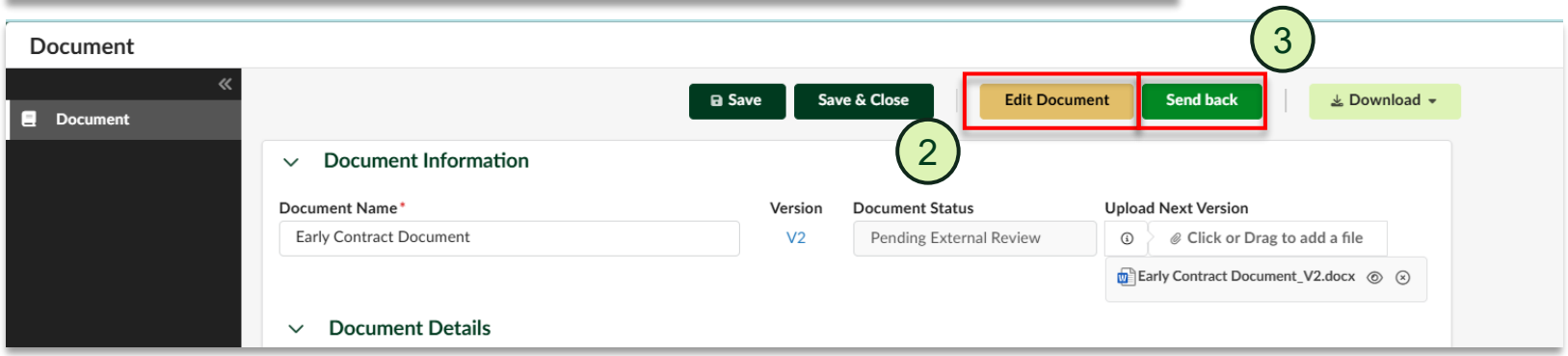
Early Contract Documents

As part of the sourcing event, Lyse may issue an early contract document before the final contract is signed

This function enabled Lyse and the supplier to discuss and finalize the contract document by sending the document back and forth while utilizing the markup functionality in MS word.

1. Click on **the pencil icon** to edit the document
2. Click **Edit Document** and make necessary changes and provide comments
3. Click **Send back** to send the document back to Lyse





Lyse

04. Maintaining supplier information

Lyse

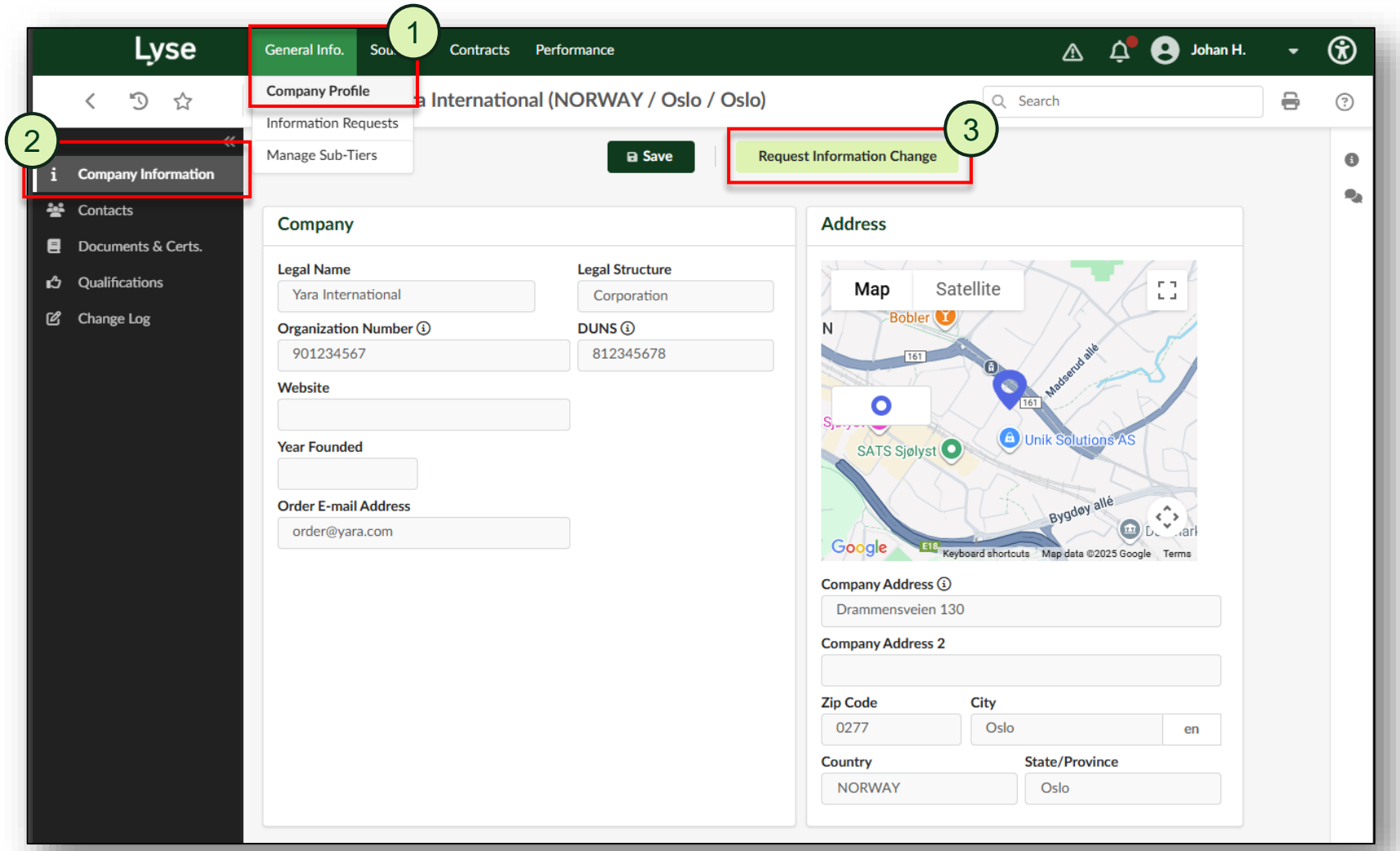
Request information change (1 of 2)

Maintaining Supplier information: Request information change

Once your company information has been registered, and the onboarding is complete, the information is locked, to avoid accidental changes

If you need to change any of the information in the **Company Information**, you can initiate a **Request Information Change**

1. Navigate to the **Company Profile**, under the **General Info** in the main menu
2. Go to the **Company Information**
3. Press the **Request Information Change** button



Lyse

Request information change (2 of 2)

Maintaining Supplier information: Request information change

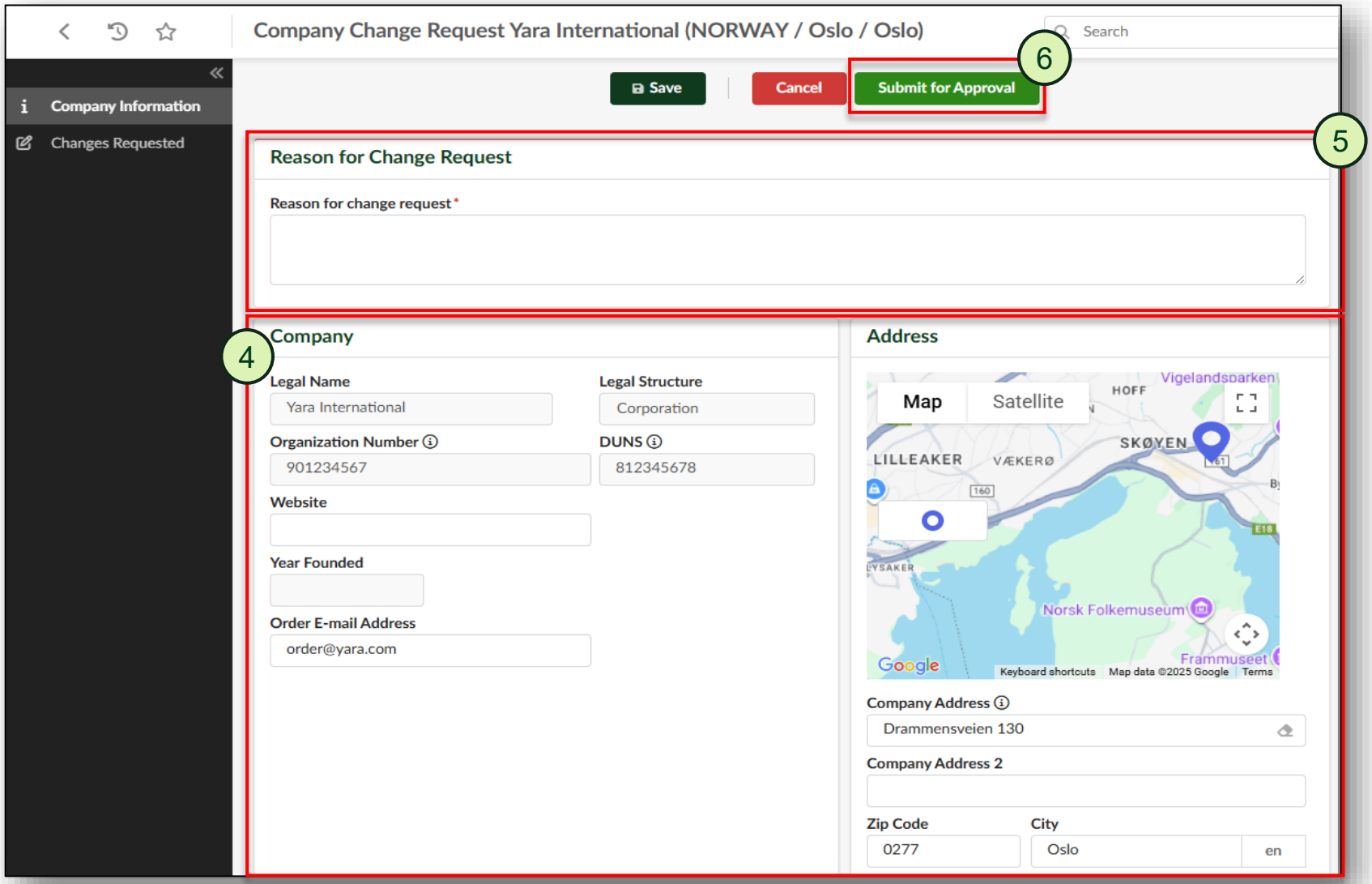
The **Company Information** page changes, to allow you to make the necessary changes

4 Make any relevant changes to the **Company** and **Address** sections

5 Type in the **Reason for change request** (mandatory), describing the reason for the change, and what you want to modify

6 Press the **Submit for Approval** button

The request for change will be sent to Lyse, who will review and approve the change



Lyse

05. Answering questionnaires

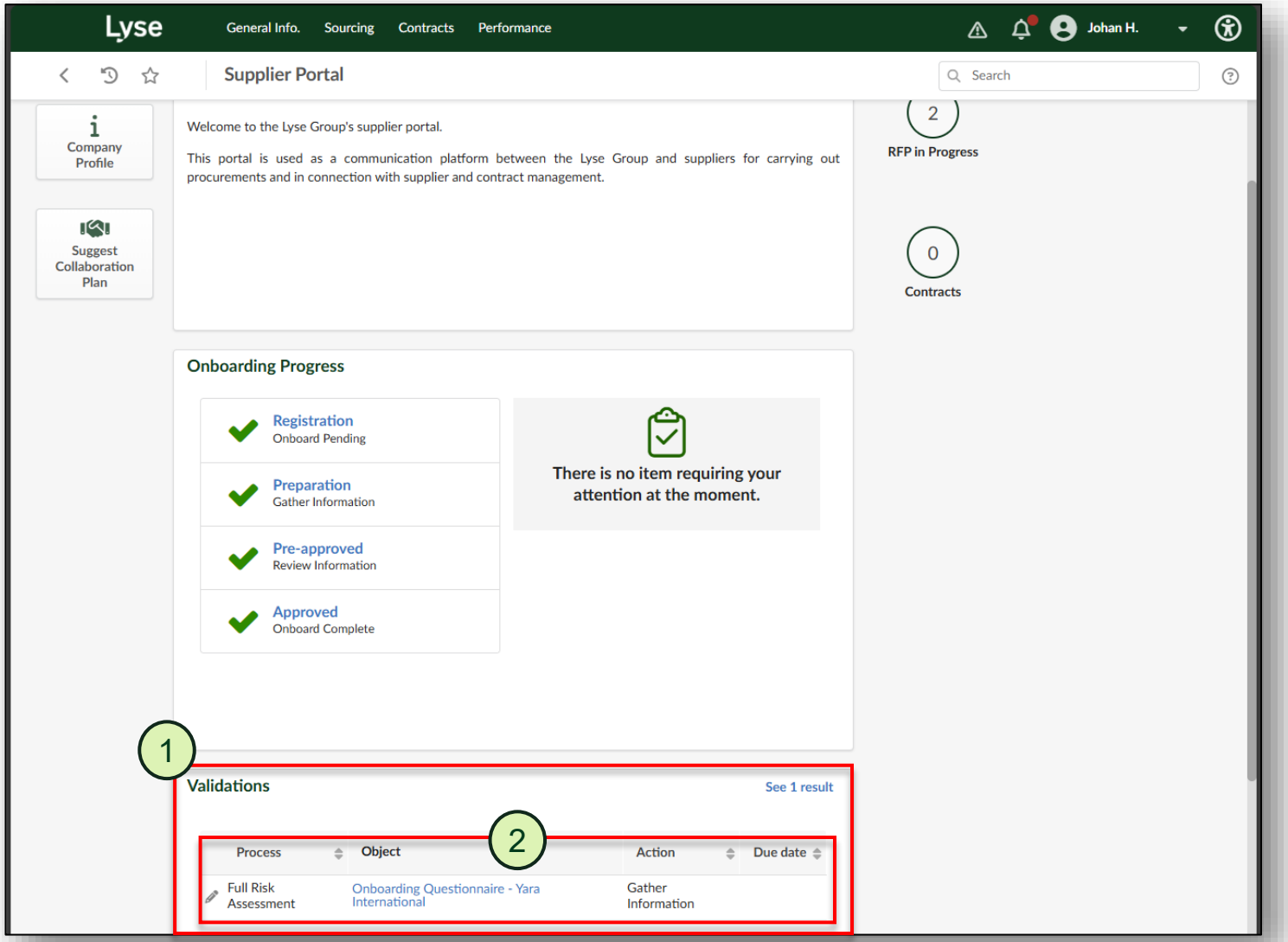
Lyse

Answering questionnaires (1 of 2)

Answering questionnaires

1. Lyse may send you different questionnaires, for example regarding onboarding or supplier satisfaction

   Any pending questionnaires can be accessed on your homepage under the **Validation** section
2. You open the questionnaire by clicking on the **Object** title



Lyse

Answering questionnaires (2 of 2)

Answering questionnaires

3 You can access the questions by clicking on the tabs in the left side of the pop-up window

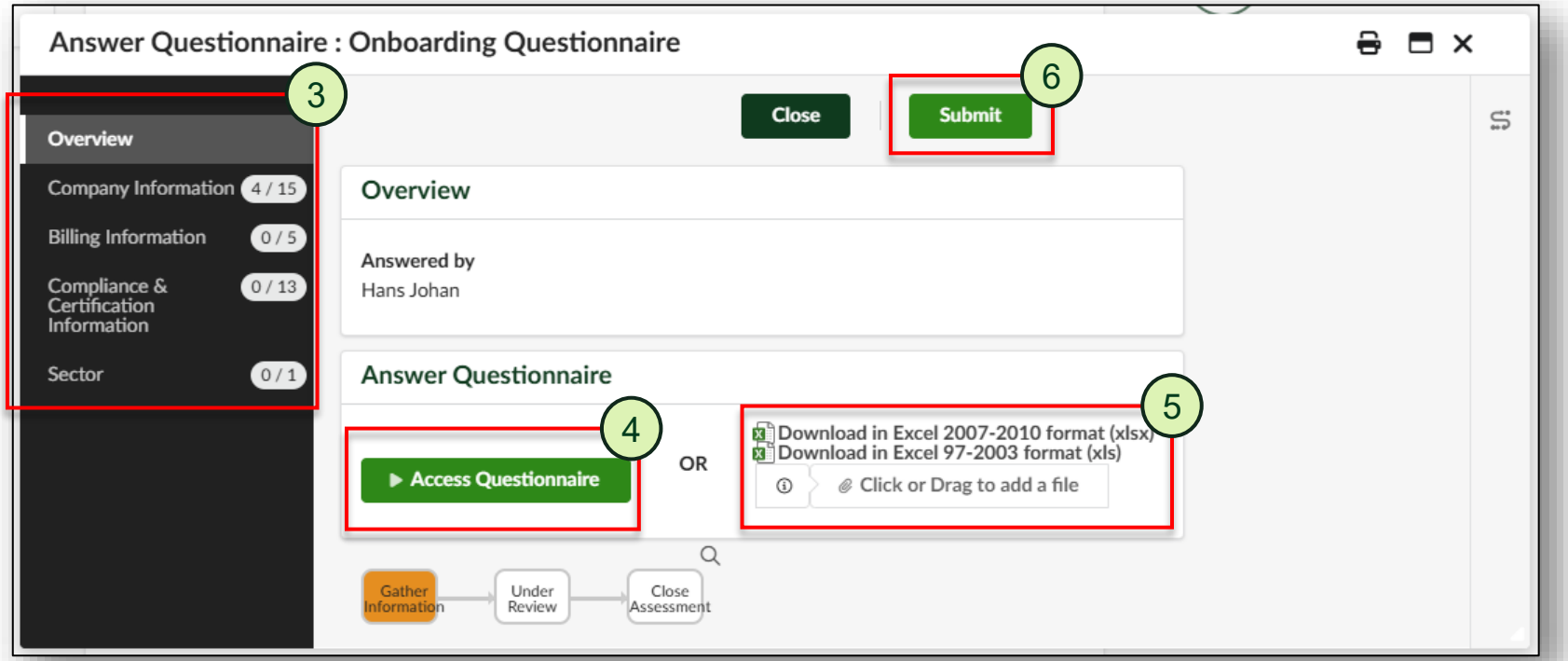
4 Or by clicking on the **Access Questionnaire** button

5 You can also choose to download the questionnaire as an excel file, respond in the file, and then upload the file again

Note: If you choose to do this, you have to comply with the format limitations in the excel file – otherwise you will not be able to upload the file again

6 Once you have answered the questionnaire, click on the **Submit** button

You will get error messages if you attempt to click on **Submit** if there are mandatory questions that you have not responded to



Lyse

06. Handling exceptions

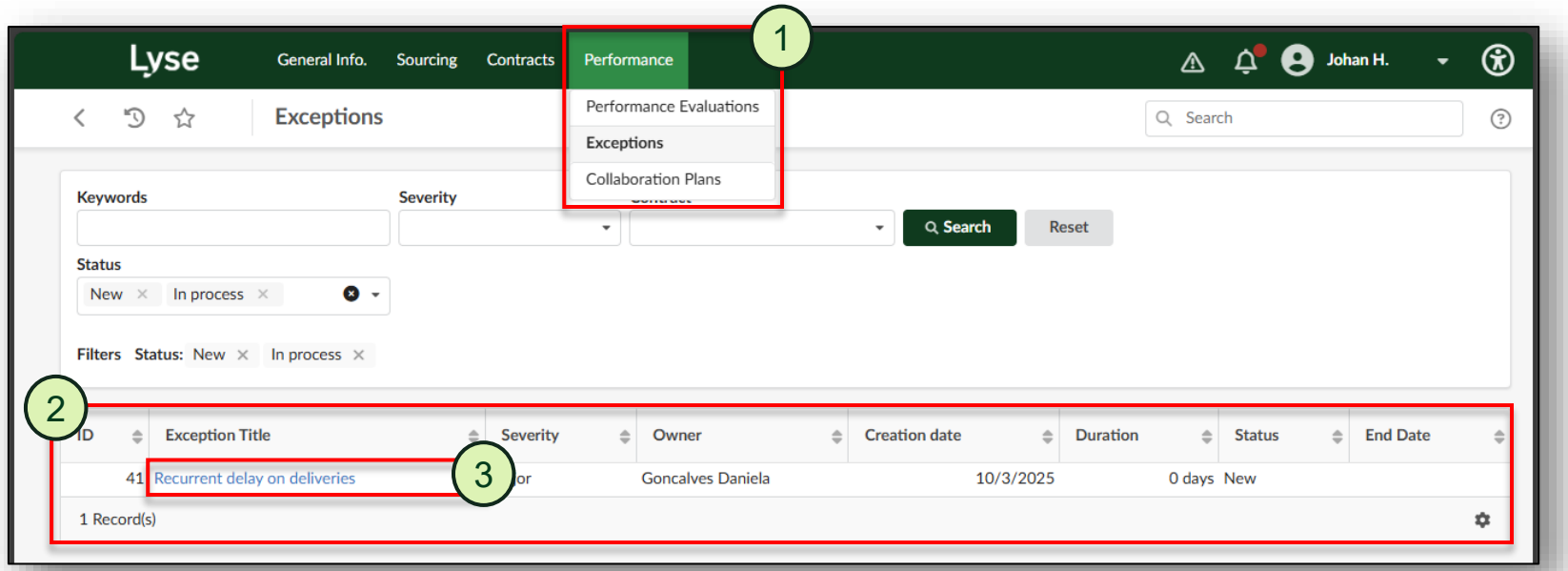
Lyse

Handling exceptions (1 of 2)

Handling exceptions

Suppliers are required to take appropriate action whenever Lyse registers an exception

1. Select **Exceptions** from the **Performance** menu
2. The list of exceptions displays a short description; the severity of the exception; the responsible person at Lyse who registered the exception, and the date the exception was created
3. You can open the exception by clicking on the description text



Lyse

Handling exceptions (2 of 2)

Handling exceptions:

4 The Origin and **Exception Description** states information regarding what type of exception, its severity, and details on the exception

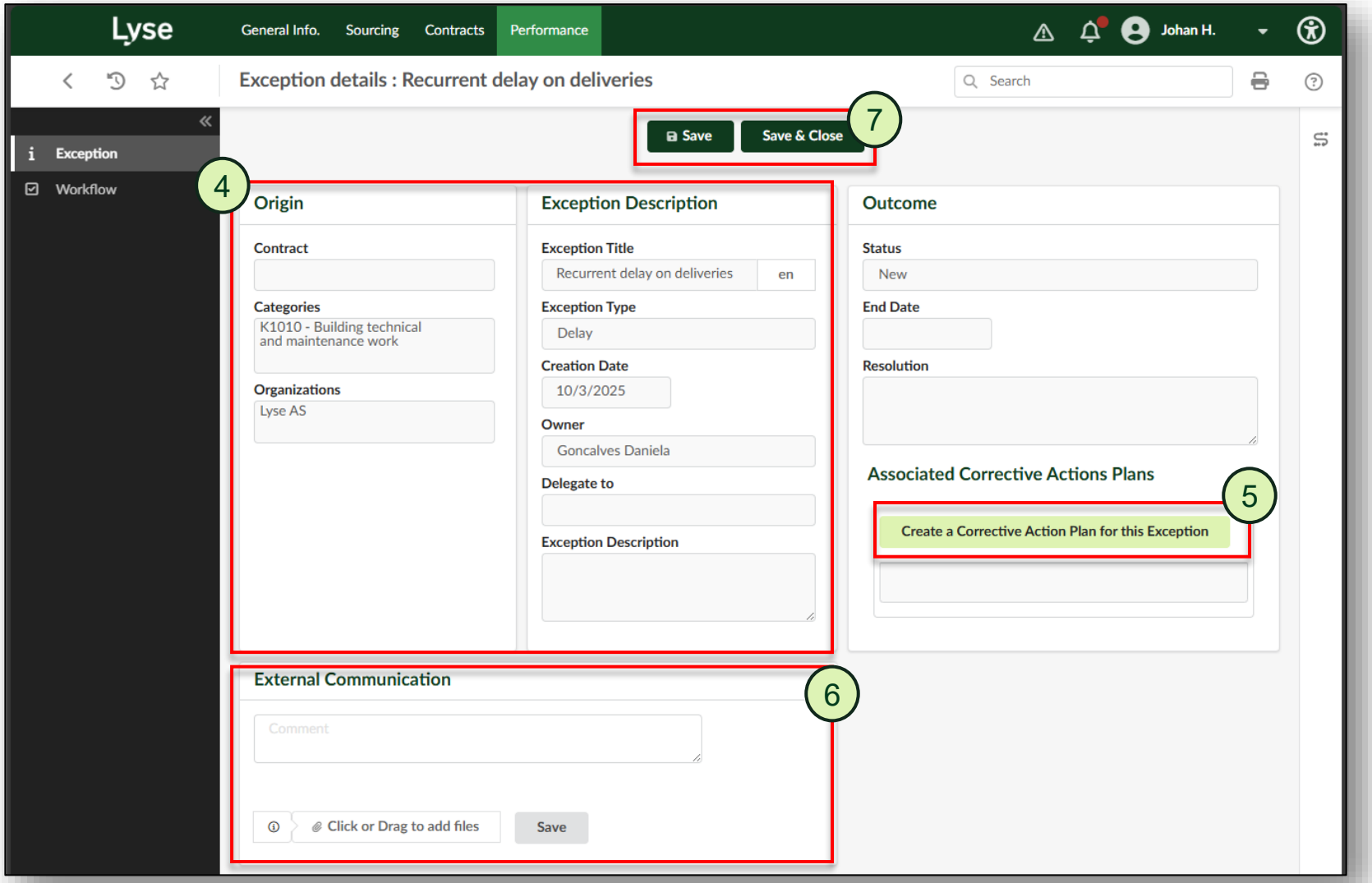
5 Your company is expected to provide a corrective action for the exception

This may be to provide a corrective action plan, or mitigate by other means

Please document what is done in the system and update when the exception is handled

6 You can communicate with the responsible person by sending a **Comment** in the **External Communication** section. You may also attach documents to the comments

7 Click the **Save** Button to send the comment



Lyse

07. Creating and managing Collaboration plans

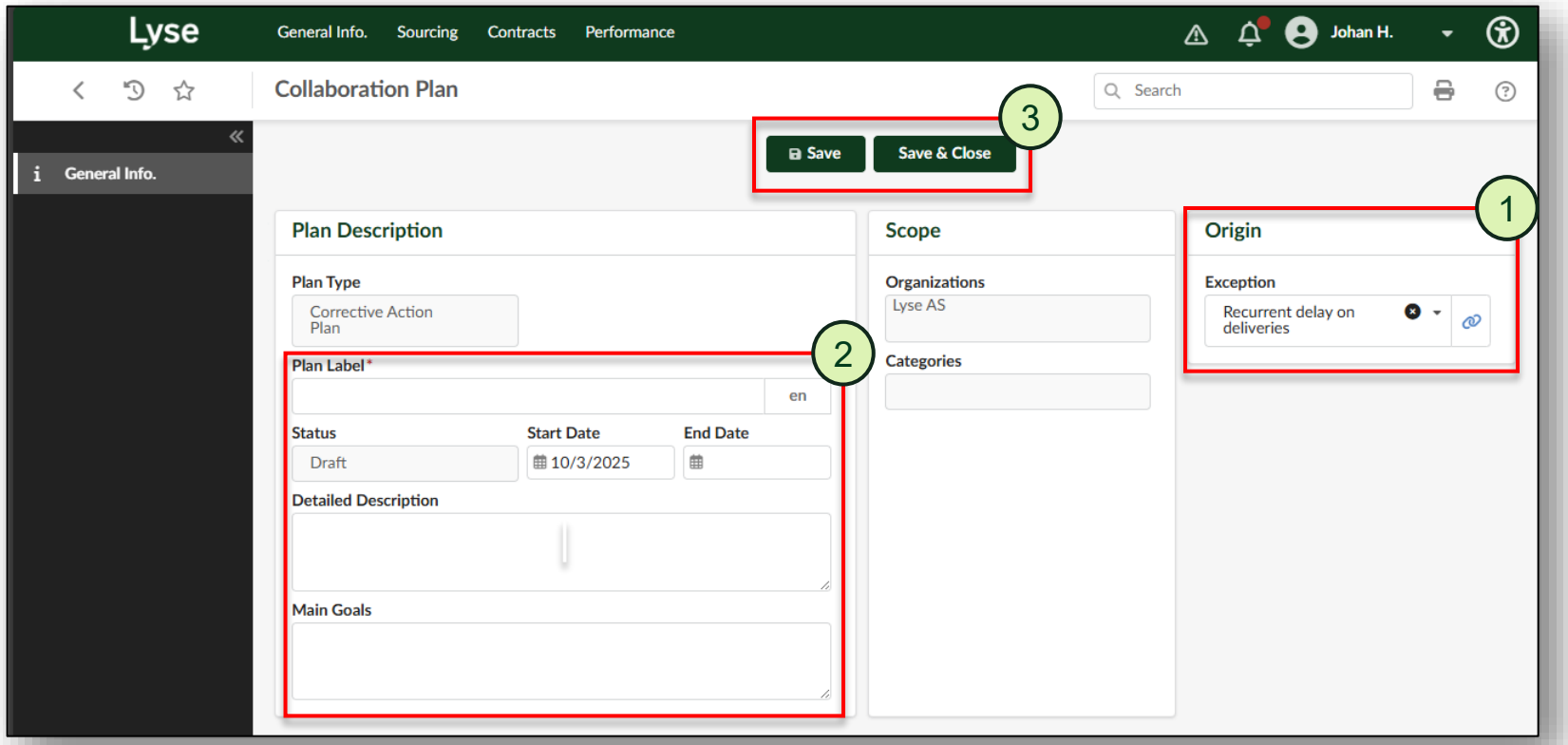
Lyse

Collaboration plans: Create from exception (1 of 2)

Collaboration plans: Created from exception

The collaboration plans are used for proposing new ways of collaboration, or for proposing corrective actions in the case of exceptions

1. If the **origin** of the plan is an exception; the exception is linked below origin
2. Enter a **Plan Label** of the collaboration plan, as well as a D**etailed Description** and the **Main Goals** of the plan
3. Once you are ready, click on the **Save** button



Lyse

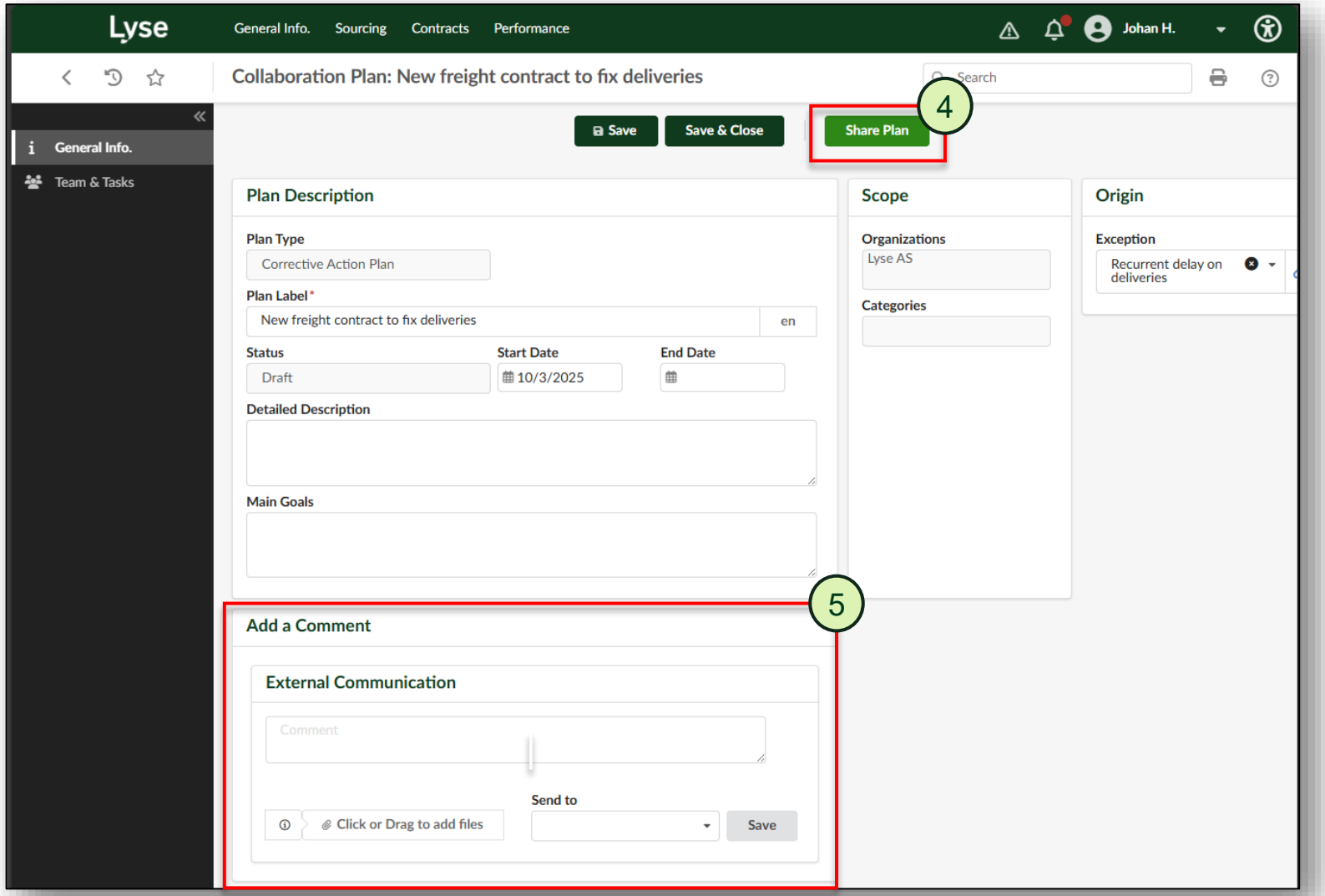
Collaboration plans: Create from exception (2 of 2)

Collaboration plans: Created from exception

4 Once you have saved the collaboration plan, click on the **Share Plan** to share the plan with Lyse

5 You can communicate with Lyse on the plan, using the **Add a Comment**, to write comments, potentially with attached files as well

Lyse can approve the plan, and, once the plan has been executed, close the plan, and the related exception



Lyse

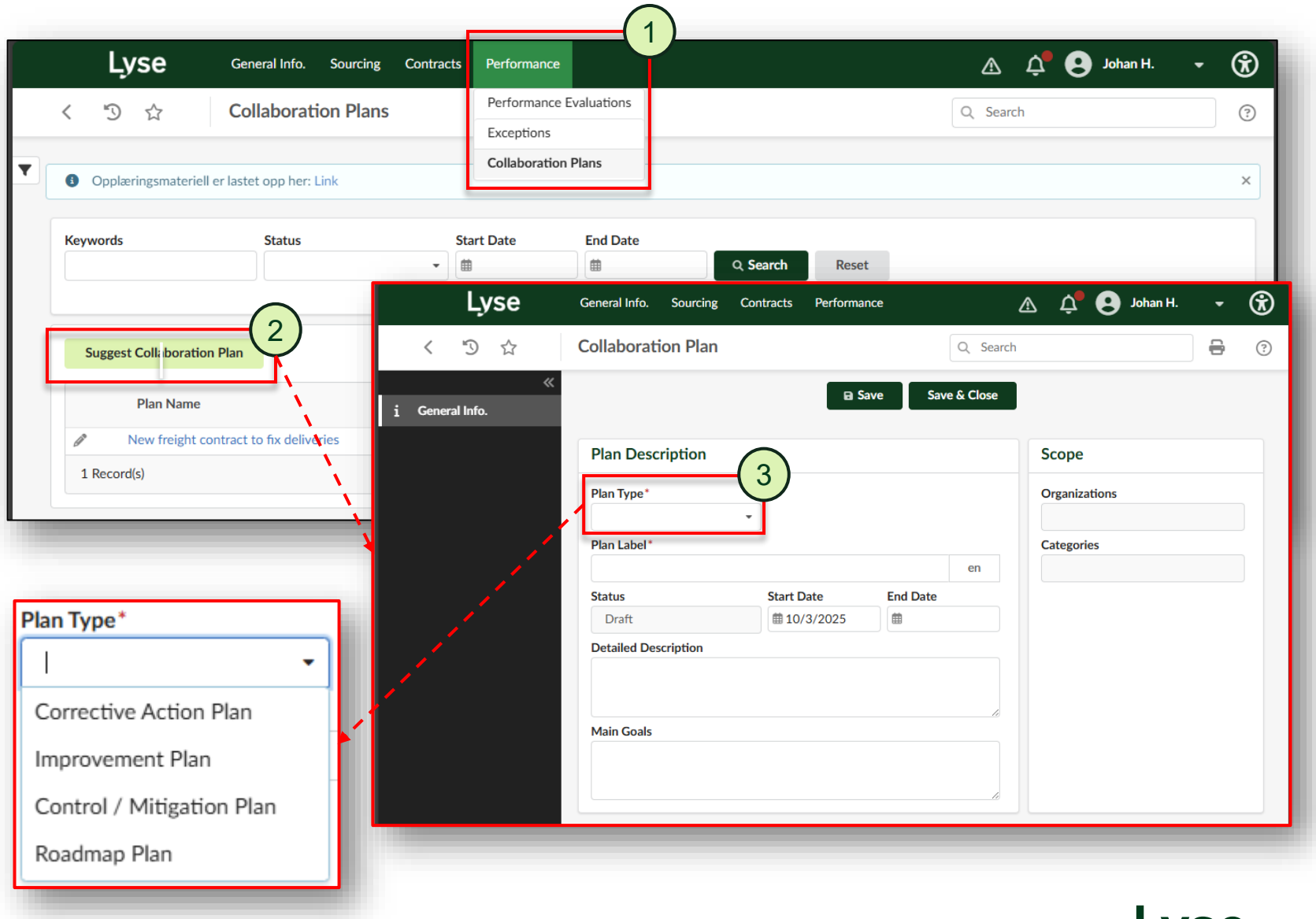
Collaboration plans: Create from scratch

Collaboration plans: Created scratch

You can create a collaboration plan from scratch, if you for instance want to propose Roadmap plan with Lyse

1. Select **Collaboration Plans** from the **Performance** menu
2. Click on the **Suggest Collaboration Plan** button
3. In the **Plan Description**, select **Roadmap plan**

   Complete the collaboration plan as on the previous pages



Lyse

08. Administrate contracts

Lyse

Table of contents – Administrate contracts

08.01	Locate and update contracts
08.02	Sub-tier suppliers
08.03	DocuSign

Lyse

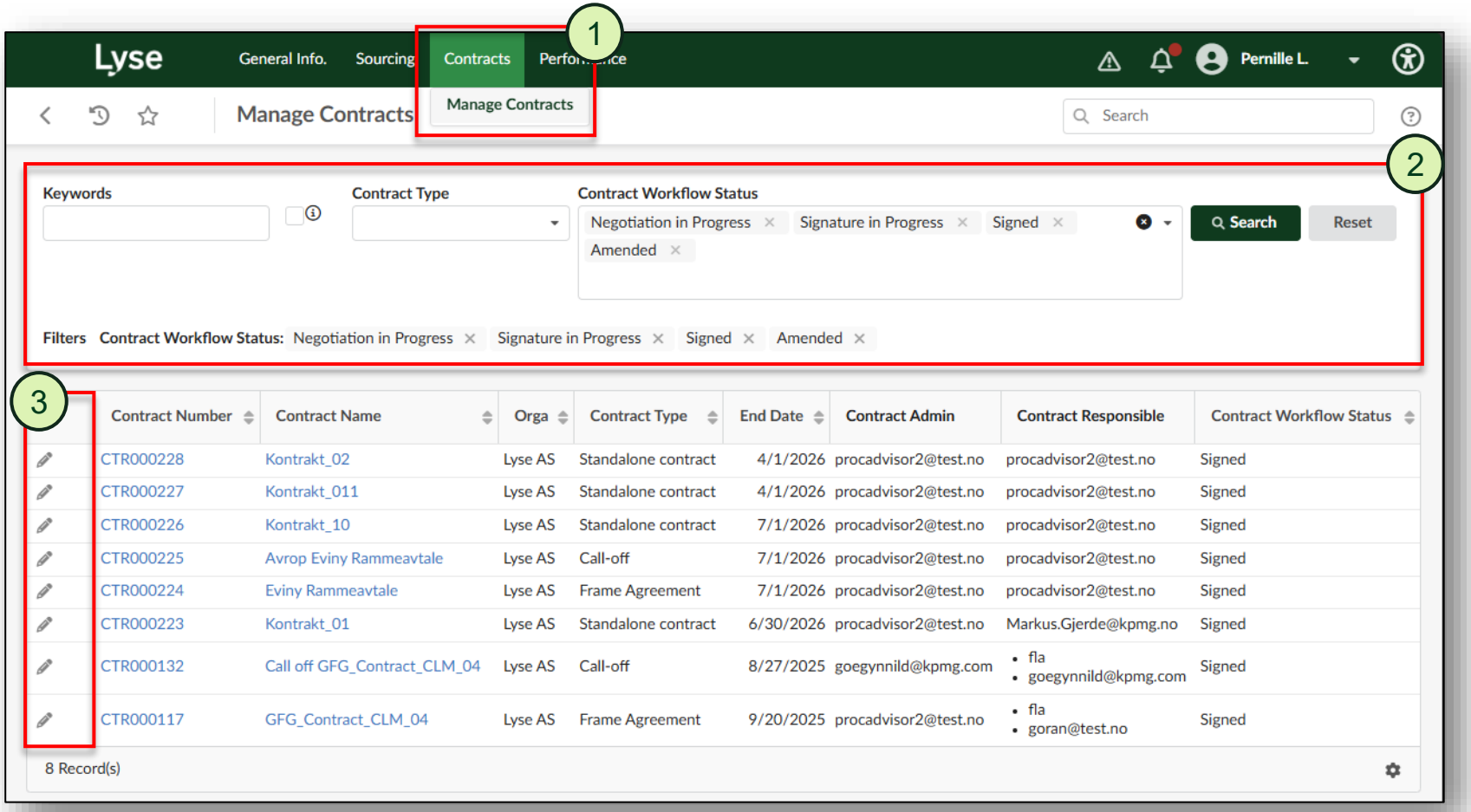
08.01 Locate and update contracts

Lyse

Administrate contracts: Locate and update contracts (1 of 3)

Administrate contracts: Locate and update contracts

1. Select **Manage Contracts** from the **Contracts** menu
2. Search for the contract you want to view, or browse all contracts in the table below
3. Click on the pencil next to the contract you want to view more about

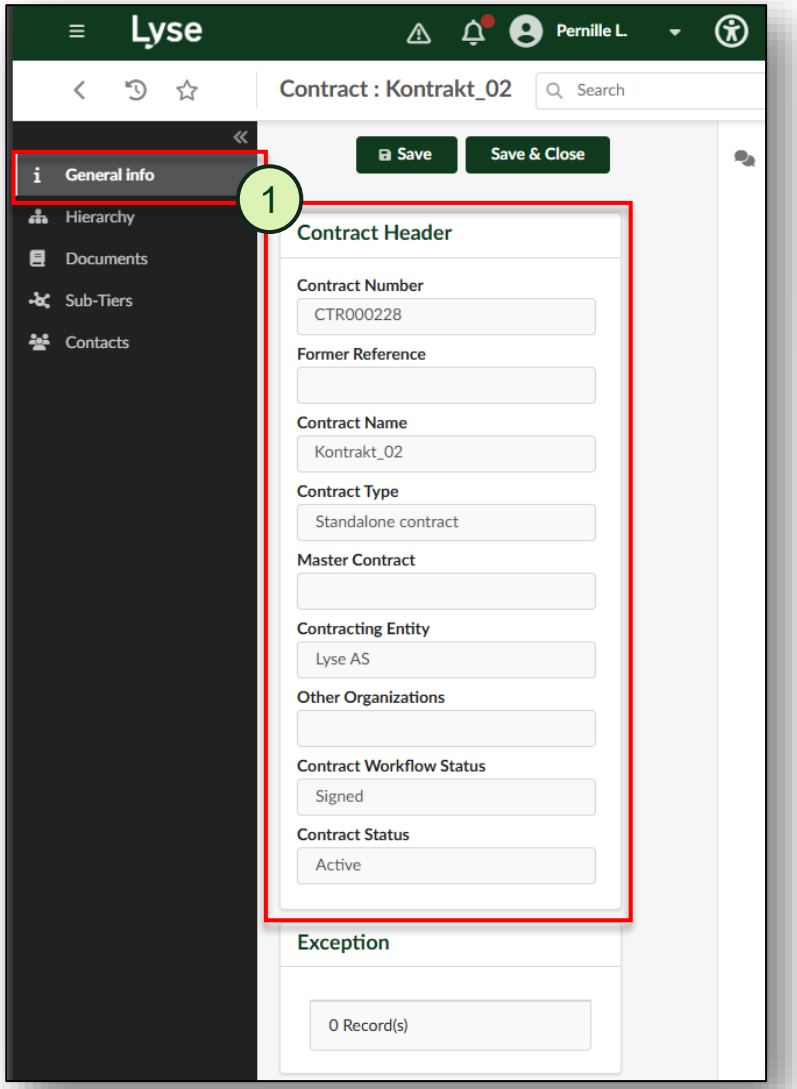


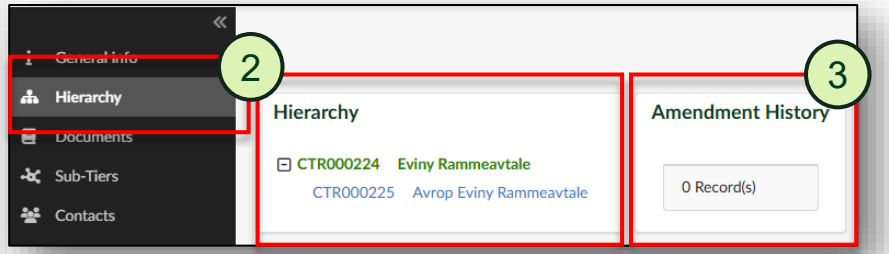
Lyse

Administrate contracts: Locate and update contracts (2 of 3)

Administrate contracts: Locate and update contracts

1. In the **General** info, this is the overview screen for your contract, here you will see important information about the contract
2. Under the Hierarchy you will see a collection of linked contracts. This will often be call-offs for a framework agreement
3. In the **Amendment History** you will see change history for the current contract



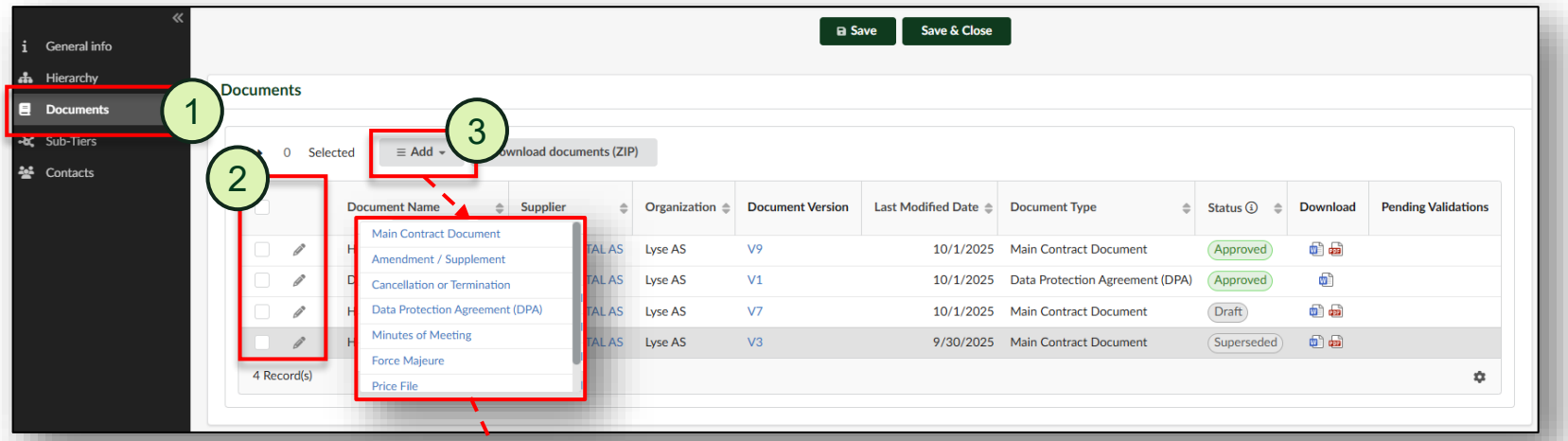


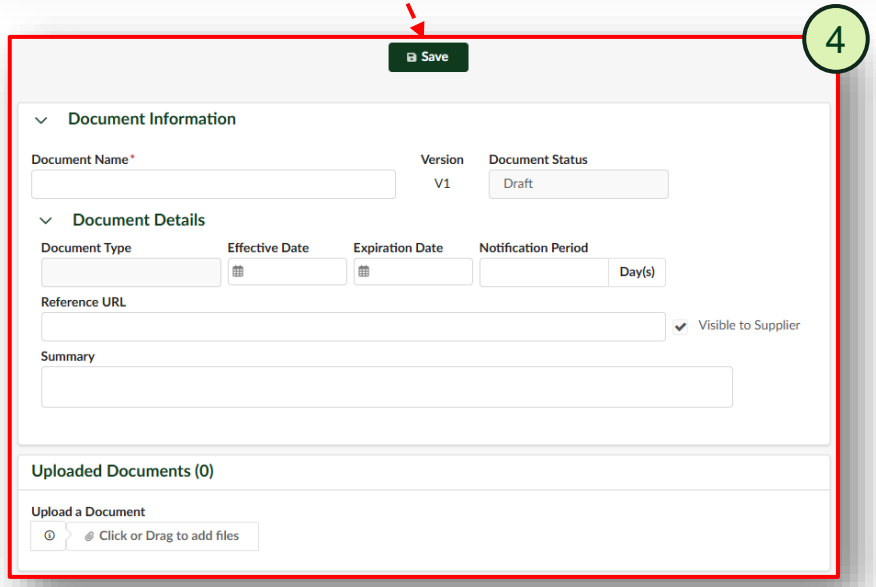
Lyse

Administrate contracts: Locate and update contracts (3 of 3)

Administrate contracts: Locate and update contracts

1. Click on **Documents**, here you will get a collection of all documents related to the contract
2. Click on the **pencil icon** to edit a document
3. Click **Add** to add a document
4. Fill the relevant information and attach documents if needed and then click on **Save** to add a Document to the contract





Lyse

08.02 Sub-tier suppliers

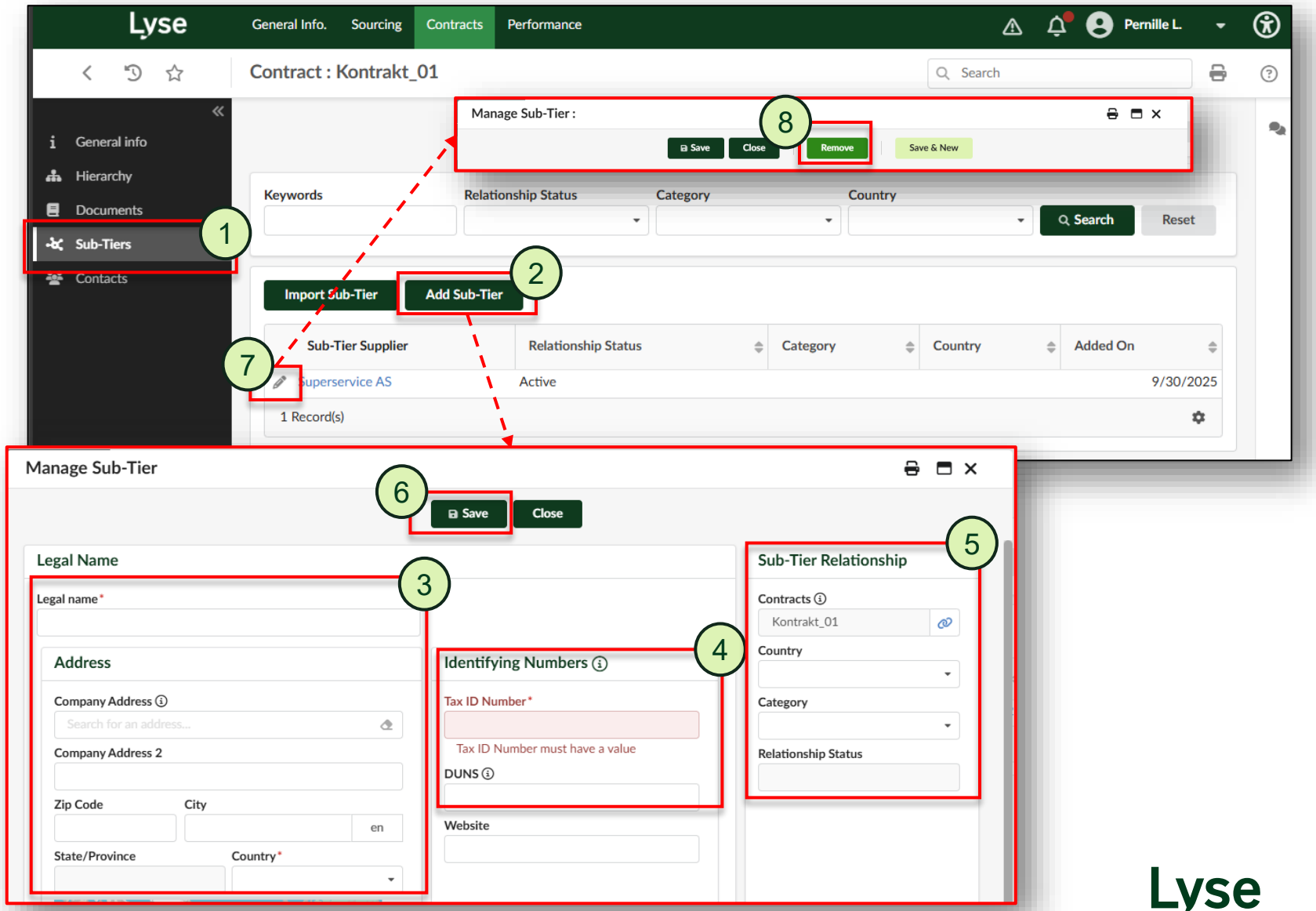
Lyse

Administrate contracts: Sub-tier suppliers

Administrate contracts: Sub-tier suppliers

If requested by Lyse, you may add sub-tier suppliers to the contract.

1. Go to the **Sub-Tiers**
2. Click on **Add Sub-Tier** to add a new sub-tier supplier
3. Enter the relevant supplier **Legal name** and address. Legal name and Country are mandatory fields
4. Enter the relevant **Identifying Numbers**, like Tax ID number and DUNS
5. If relevant, enter the relationship, like what category and country you work with the sub-tier supplier in
6. Click the **Save** button
7. Click on pencil icon of the sub-tier you want to remove
8. Click on the button **Remove** sub-tier



Lyse

08.03 DocuSign

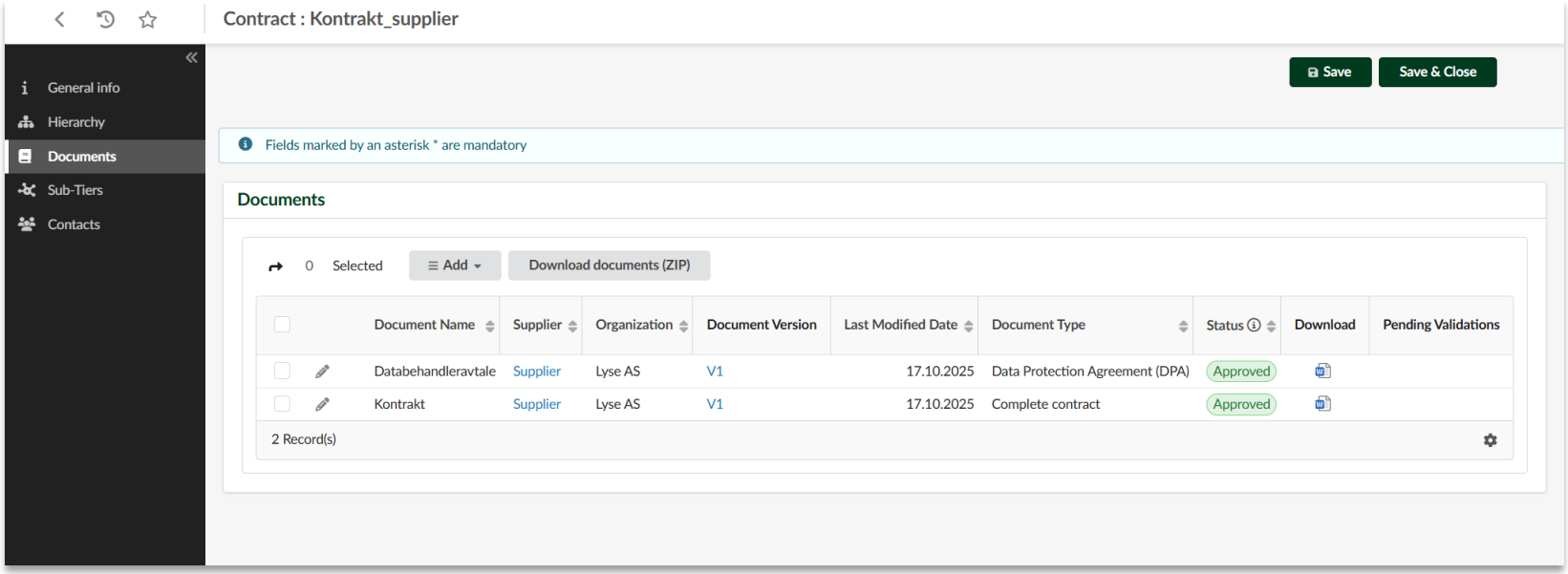
Lyse

DocuSign

Sign documents with DocuSign

1. For documents that require a formal signature, Lyse will for the most part utilize DocuSign to send the finished contract document for signature
2. As a supplier you will receive a mail if you are required to sign the document

If you have any questions concerning the DocuSign process, you can use the chat functionality described in 02.04 or reach out to your Lyse contact



Lyse

Lyse