Supplier User Guide

For HCOB Supplier Portal

Agenda

1 Registration

2 Editing Company Information

3 Uploading contract deliverables & reports

1 Registration

Receiving a registration mail

As soon as we invite you as a supplier for HCOB, you will receive the following email by mail address no-reply-hcob-bank@ivalua.com.

After setting your password you can login for the first time using the link in your received mail.

Subject

Access to Ivalua

Message

Dear Max Mustermann,

You have just been given access to the Ivalua application for supplier Musterfirma with the following user ID:
Max.Mustermann@musterfirma.de

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

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

Kind regards,
Procurement & Vendor Management Team

Hamburg Commercial Bank AG
Procurement & Vendor Management
Gerhart-Hauptmann-Platz 50
20095 Hamburg

Note: This is an automatically generated e-mail from the application "Ivalua" on behalf of Hamburg Commercial Bank.
Click here to manage your notifications settings.

First time login

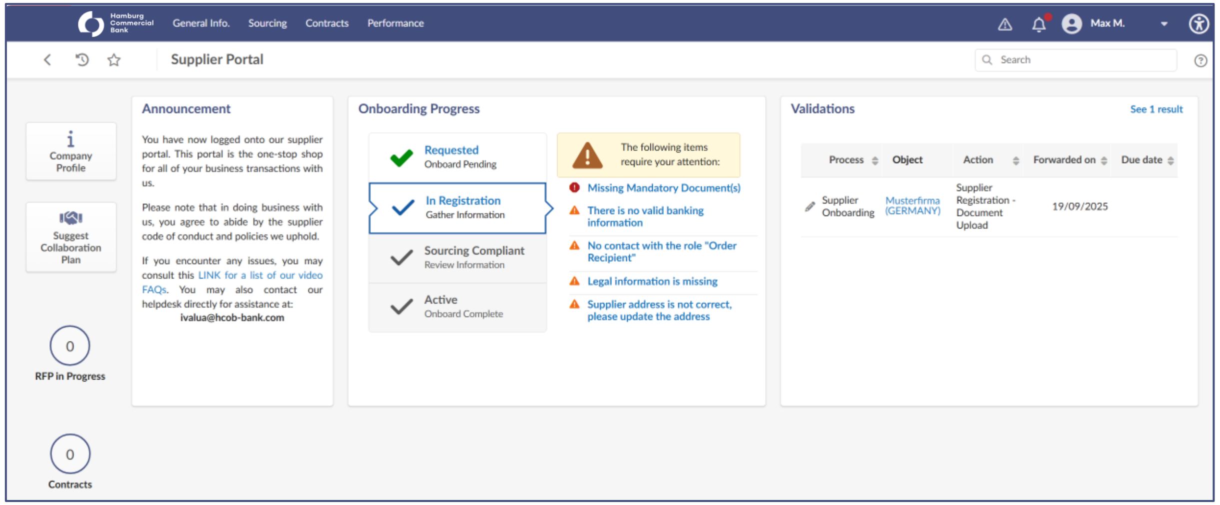
When you log in for the first time, you will be informed about the general data protection regulation, which you must accept in order to login by checking the box and clicking the "Acknowledge" button.

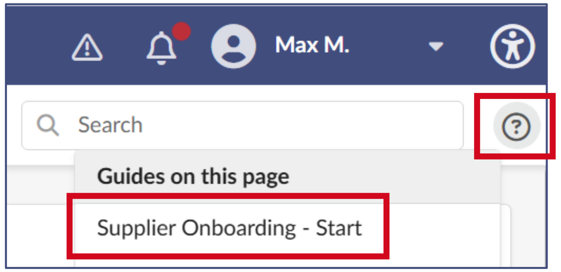
Afterwards you will be redirected to your homepage.

Getting a first overview

To get an initial overview of the functions and navigation options in our supplier portal, use our user manual “Supplier Onboarding – Start” directly in the system.

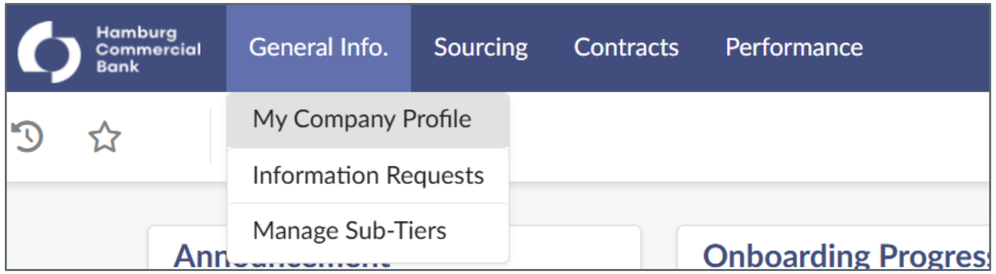
You can find this via the question mark icon on the right-hand side of the function bar.



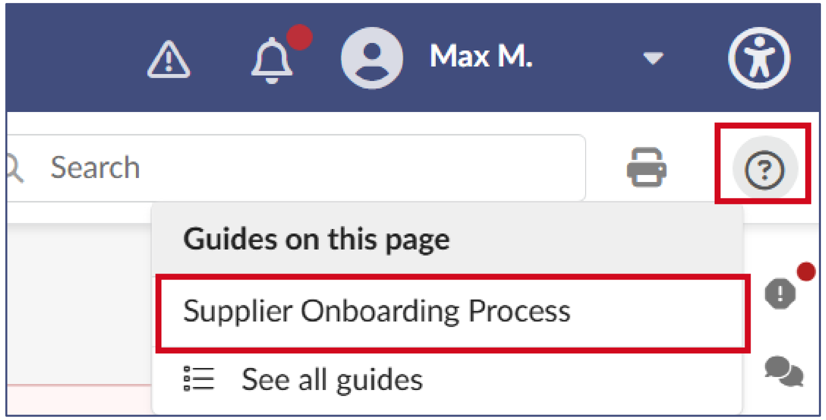


Onboarding Process

To complete your supplier profile and finish the onboarding process, navigate to **General Information - My Company Profile**.



There you have the opportunity to go through the onboarding process step by step with the help of the user manual. Open the user manual “Supplier Onboarding Process” via the question mark icon on the right in the function bar.



2 Editing Company Information

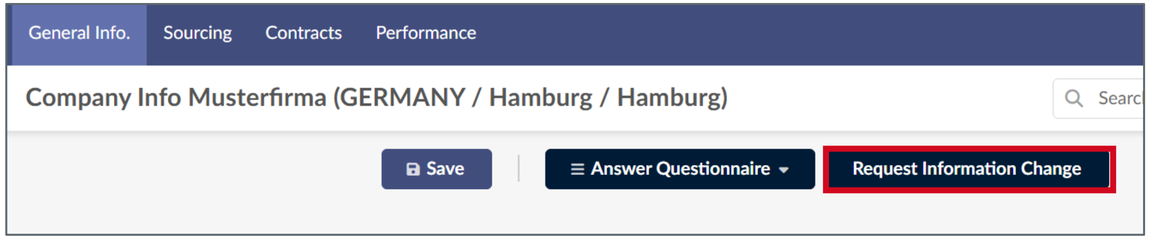
Editing company information

After completing the onboarding process you are always able to change your company information directly inside Ivalua. Therefore, you go to the Ivalua page “My Company Profile”.

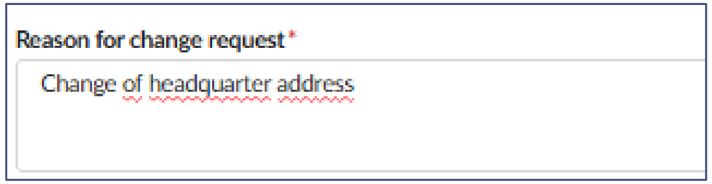
1. Editing general information
2. Adding, Deleting or Changing Banking Information
3. Adding another contact person
4. Adding Sub-Tiers

Editing general information

In order to change general company information, you have to click on the Button „Request Information Change“ within your company information. Afterwards you are able to edit the fields on the tabs “Company Information” and “P2P-Information”.



In order to submit your changes to HCOB you have to enter a reason for the changes. Afterwards you are able to click on “Submit for Approval”. A HCOB employee has to review your changes and approve them.

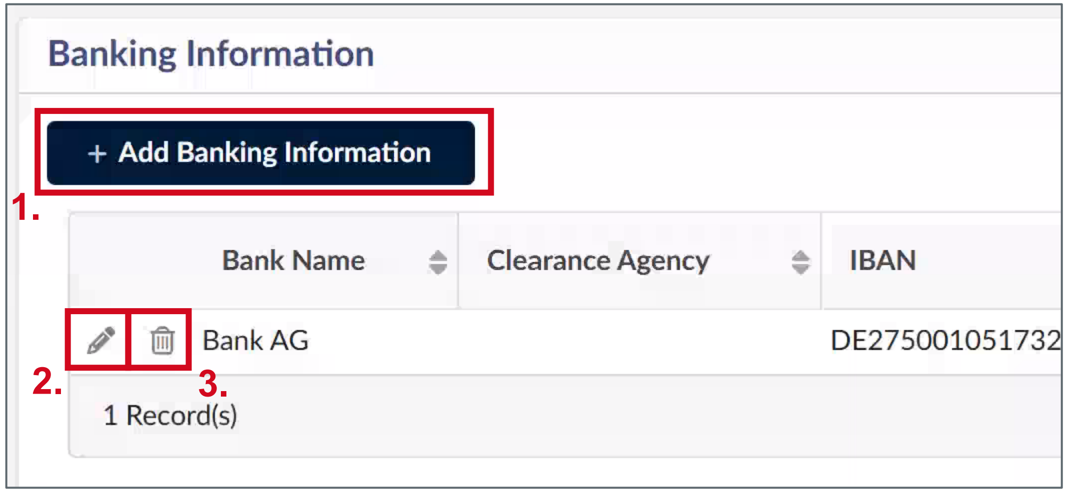


Adding, Deleting or Changing Banking Information

Banking Information can be changed inside the tab „P2P-Information“. You can either

1. add another banking information,
2. edit the current banking information, or
3. delete a banking information.

Changes of the banking information also have to be verified by an HCOB employee.



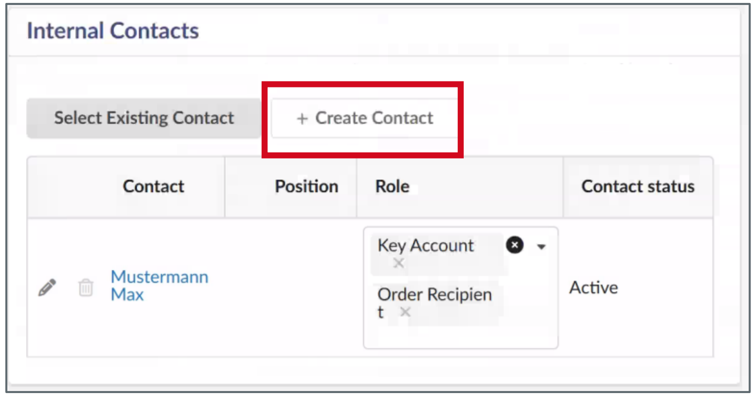
Adding another contact person

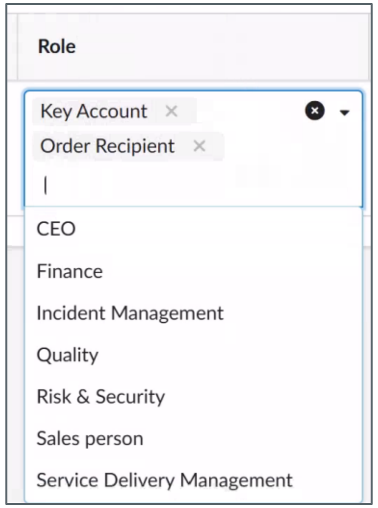
You can always add other contact persons from your company who should also have access to the platform.

By assigning different roles you can differentiate the contact persons for better communication.

Key Account is responsible for the onboarding process and the mail address, and the Order Recipient will receive the orders at a later point.

Besides that, the roles do not come with different authorizations in Ivalua.



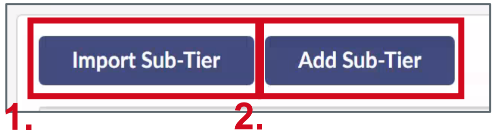


Adding Sub-Tiers

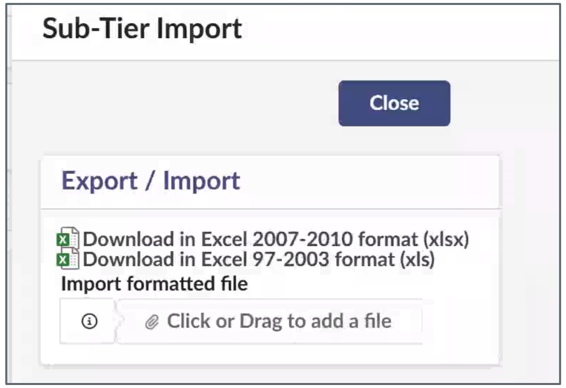
Sub-Tiers can be managed on the page “Manage Sub-Tiers”.

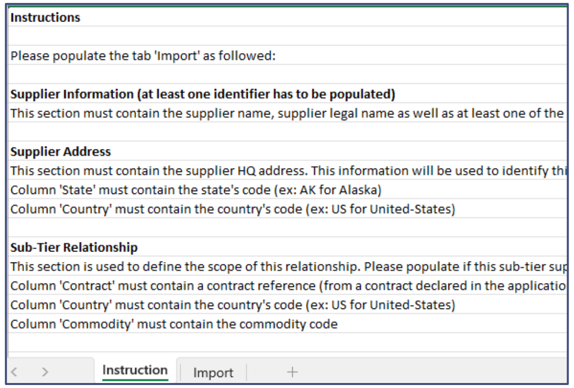
Sub-Tiers can be added

1. importing an excel file, or
2. using the Ivalua interface.



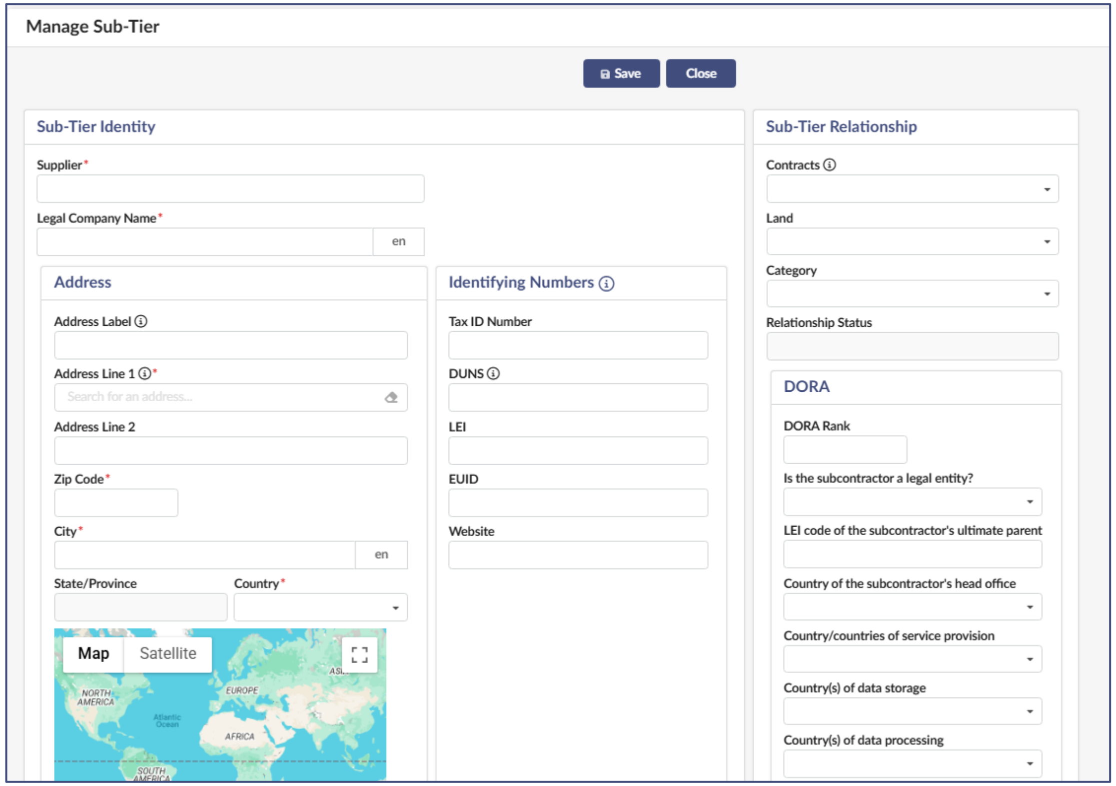
The excel file can be downloaded and filled offline. How to fill the excel file is described in the tab “Instruction” of the excel file. Using the excel file will allow you to add more than one sub-tier at once.





Adding Sub-Tiers

Using the Ivalua interface please fill out all mandatory fields which are marked with an *.



Hamburg Commercial Bank

3 Uploading contract deliverables & reports

Uploading contract deliverables & reports

Deliverables & Reports that have been contractually agreed upon are tracked and stored in the system. When an obligation is due you will receive a notification via mail to upload a new document.

You will also see a new task on your homepage when logging in. You will be asked to:

- Enter effective date of your uploaded document.
- Enter expiration date based on the contractually agreed cycle. When this expiration date is reached (minus the notification period) you will receive the next reminder for uploading a new version.
- Upload the document or check whether the already uploaded document is still valid. If the document is still valid, please add a comment after submitting the new version.
- Submit the document.