



# Vendor Quick Start – Contract Review & Redlining

## Who Is This For?

Use this guide if ATB has shared a **contract** with you and requested that you **review or redline contract terms** in the ATB Ivalua Vendor Portal.

## What You Need to Do


- Log in to the ATB Ivalua Vendor Portal using the link in the notification email from ATB Ivalua <**no-reply@ivalua.atb.com**>
- Review and redline the contract as requested
- Submit your feedback through the portal

*Note: For a visual walkthrough of these steps, refer to the Contract Review Details (Reference) section of this document, which includes screenshots of the portal interface.*

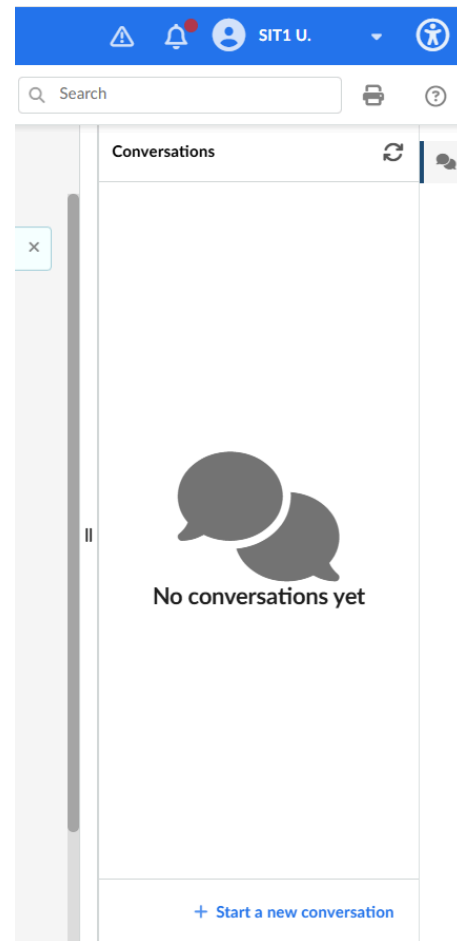
## Need Help?


### Contract Support

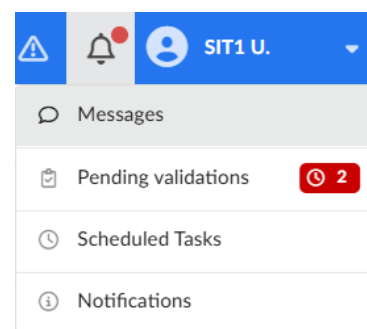
- Contact your **ATB representative** using the **Conversation feature** in the **right-hand panel** of the contract workspace or the **Notifications** feature in the **header bar**

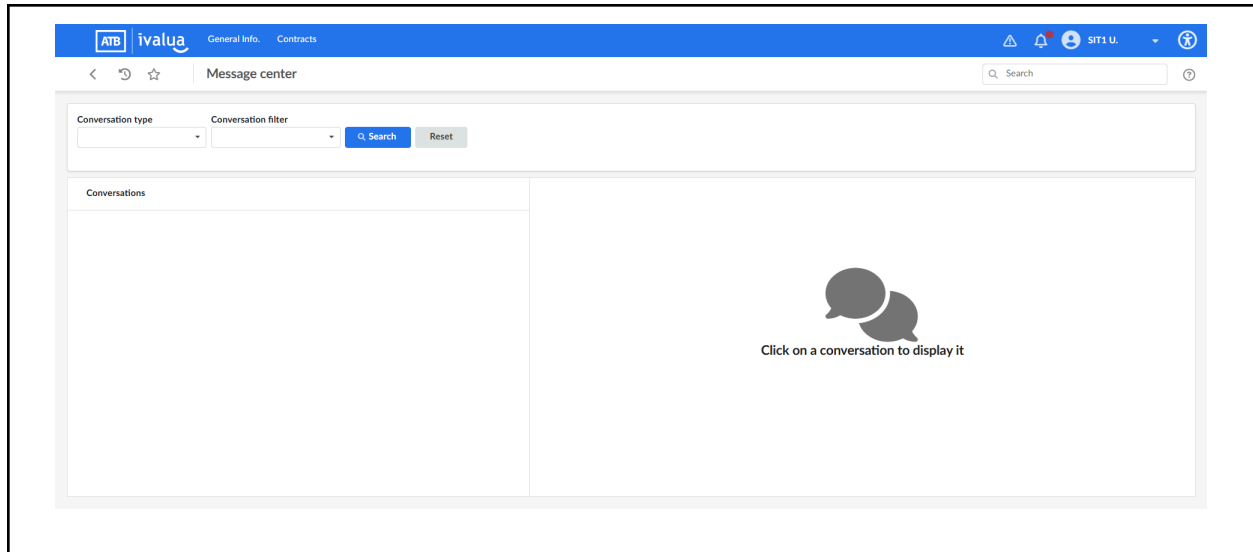
Click on the **Conversations**  icon in the right-hand panel to open the Conversations panel.

Click on the **+ Start a new conversation** link at the bottom of the Conversations panel to begin a discussion.



Alternatively, click the **Notifications**  icon in the header bar and select **Messages** to open the **Message Center**. Here you can view past conversations, and/or select a conversation to continue.





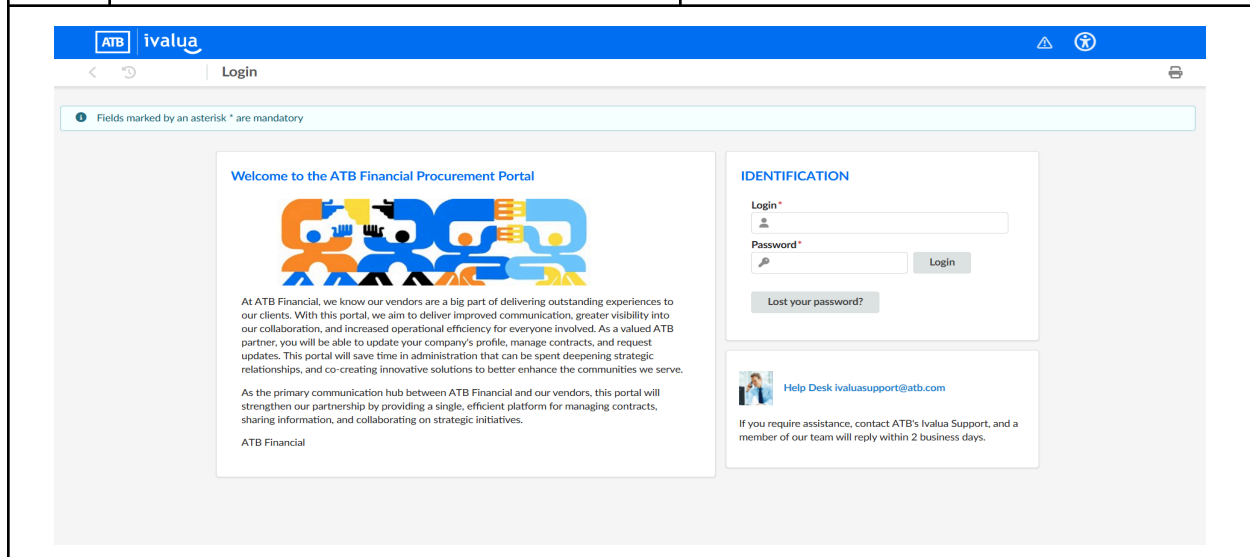
## Technical Support

- If you are experiencing technical difficulties or are unable to log in, contact ATB at [ivaluasupport@atb.com](mailto:ivaluasupport@atb.com)

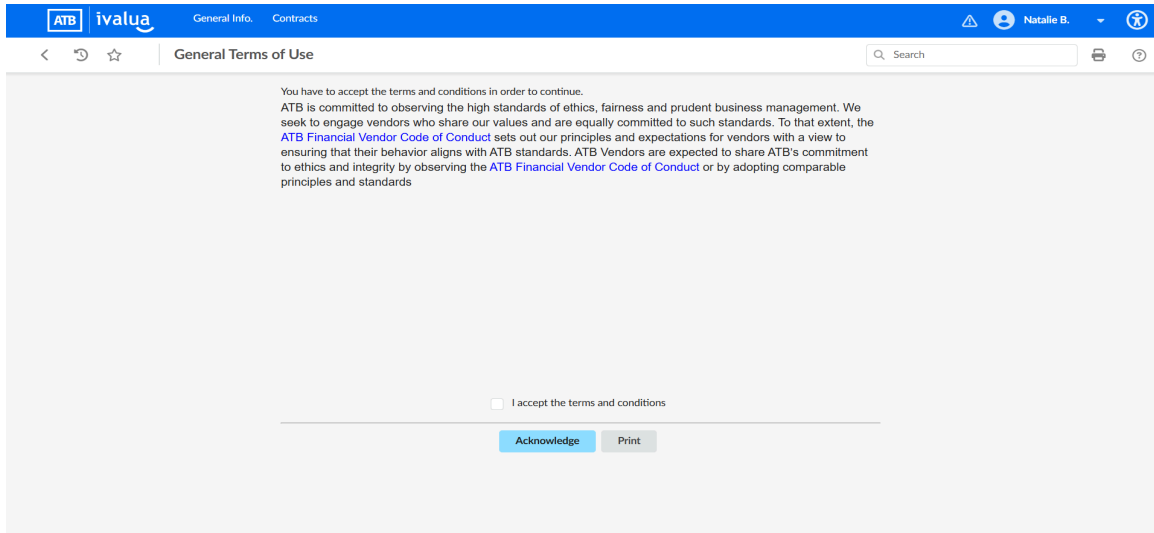
## Contract Review Details (Reference)

### Contract Review Steps

Step	What You Need to Do	Where to Go
1	Log in to the ATB Ivalua Vendor Portal using the link provided by ATB	ATB Ivalua Vendor Portal Login Page



Step	What You Need to Do	Where to Go
2	Review and acknowledge the General Terms of Use (first login only)	General Terms of Use page



ATB Ivalua General Info. Contracts

General Terms of Use

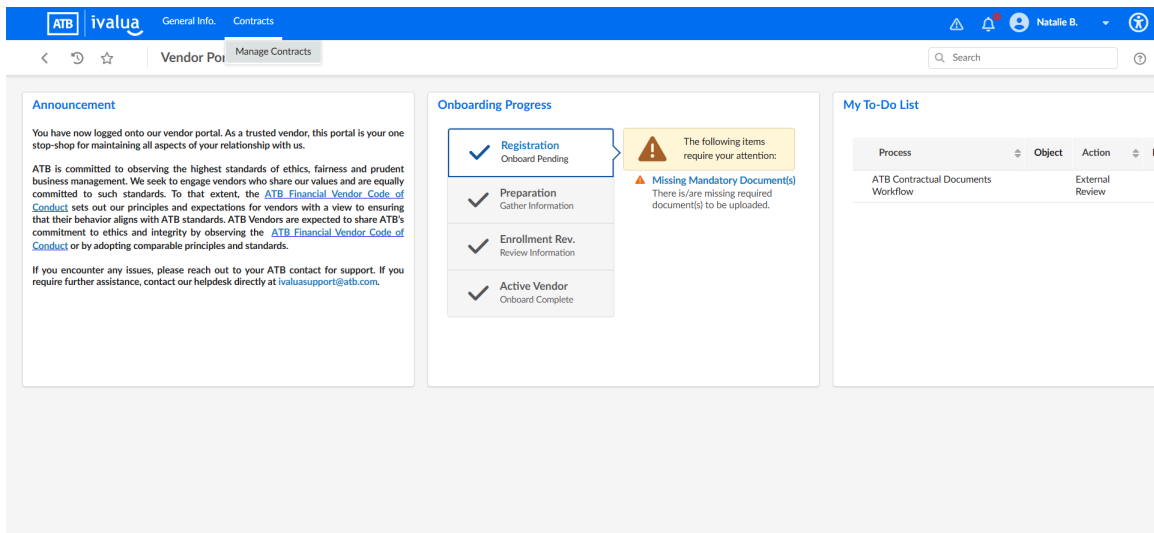
You have to accept the terms and conditions in order to continue.

ATB is committed to observing the high standards of ethics, fairness and prudent business management. We seek to engage vendors who share our values and are equally committed to such standards. To that extent, the [ATB Financial Vendor Code of Conduct](#) sets out our principles and expectations for vendors with a view to ensuring that their behavior aligns with ATB standards. ATB Vendors are expected to share ATB's commitment to ethics and integrity by observing the [ATB Financial Vendor Code of Conduct](#) or by adopting comparable principles and standards

☐ I accept the terms and conditions

Acknowledge Print

3	Navigate to the Contracts Menu and access the contract	Vendor Portal Home Page → Contracts → Manage Contracts
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ATB Ivalua General Info. Contracts

Vendor Portal Manage Contracts

Search

**Announcement**

You have now logged onto our vendor portal. As a trusted vendor, this portal is your one stop-shop for maintaining all aspects of your relationship with us.

ATB is committed to observing the highest standards of ethics, fairness and prudent business management. We seek to engage vendors who share our values and are equally committed to such standards. To that extent, the [ATB Financial Vendor Code of Conduct](#) sets out our principles and expectations for vendors with a view to ensuring that their behavior aligns with ATB standards. ATB Vendors are expected to share ATB's commitment to ethics and integrity by observing the [ATB Financial Vendor Code of Conduct](#) or by adopting comparable principles and standards.

If you encounter any issues, please reach out to your ATB contact for support. If you require further assistance, contact our helpdesk directly at [ivaluasupport@atb.com](mailto:ivaluasupport@atb.com).

**Onboarding Progress**

- ✓ Registration Onboard Pending
- ✓ Preparation Gather Information
- ✓ Enrollment Rev. Review Information
- ✓ Active Vendor Onboard Complete

**My To-Do List**

The following items require your attention:

Missing Mandatory Document(s)  
There is/are missing required document(s) to be uploaded.

Process	Object	Action
ATB Contractual Documents Workflow		External Review

Step	What You Need to Do	Where to Go
4	Review the contract details and attached documents	From the Manage Contracts page, select the contract to open the contract workspace

ATB ivalua General Info. Contracts

Manage Contracts

Keywords  Contract Type  Contract Workflow Status

Filters Contract Workflow Status: Negotiation in Progress x Negotiation in Progress x Signature in Progress x Active x Amended x

Code	Contract Name	Contract Type	End Date	Contract Amount Excl. Tax	Currency	Contract Workflow Status
CTR001684	Global Insights - MSA - Consulting	Master Agreement	12/31/2026	200,000.00	CAD	Negotiation in Progress

1 Record(s)

5	Review and edit the contract directly by adding redlines or comments, if required	Contract Workspace → Documents tab → Contract document
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ATB ivalua General Info. Contracts

Contract: Global Insights - MSA - Consulting

Save Save & Close

Fields marked by an asterisk \* are mandatory

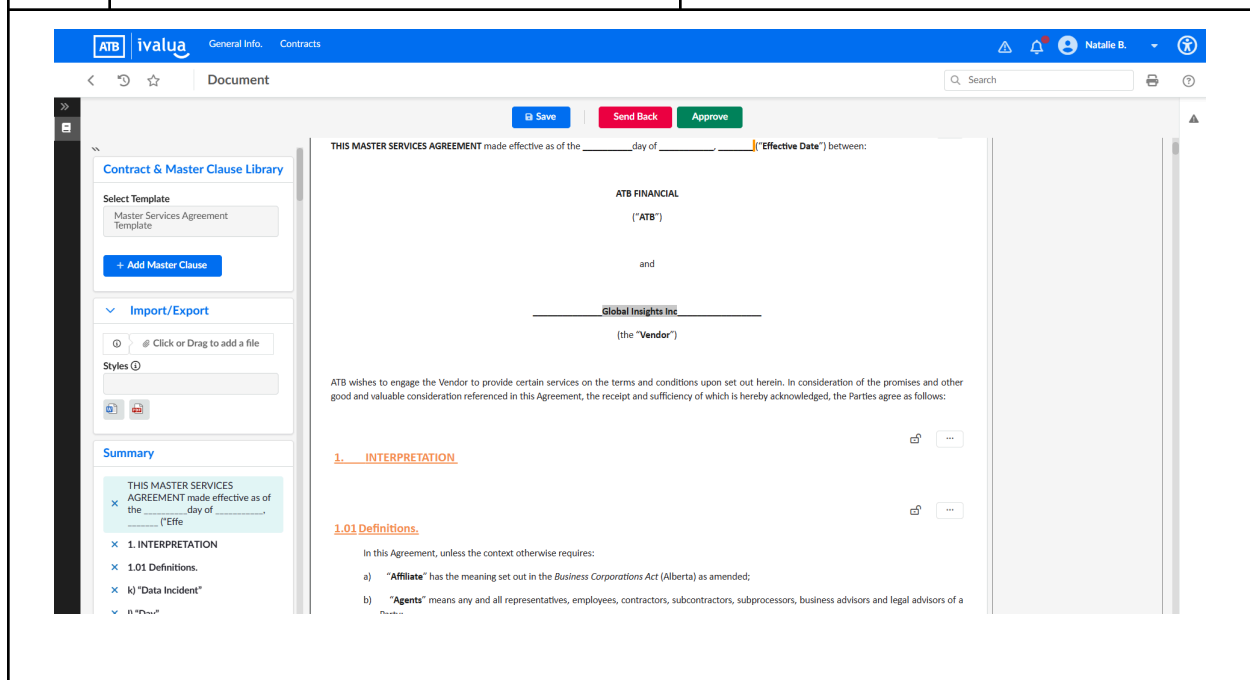
Documents

0 Selected Add Download documents (ZIP)

Document Name	Supplier	Organization	Document Version	Last Modified Date	Document Type	Status	Download	Pending Validations
MSA	Global Insights	Procurement	V3	1/26/2026	Main Contract	Pending External Review	<input type="button" value="Download"/>	<input type="button" value="Send Back"/> <input type="button" value="Approve"/>

1 Record(s)

Step	What You Need to Do	Where to Go
6	<p>After completing your edits, submit your review:</p> <ul style="list-style-type: none"> <li>Use <b>Send Back</b> if you've added changes or comments that require further discussion</li> <li>Use <b>Approve</b> if you're comfortable with the document in its current form, including any changes you've made</li> </ul>	Contract Workspace → Document Actions (top of page)



The screenshot displays the Ivalua Contract Workspace interface. The top navigation bar includes the ATB logo, the word "ivalua", and links for "General Info" and "Contracts". A user profile for "Natalie B." is visible on the right. The main area is titled "Document" and features a search bar. On the left sidebar, there are sections for "Contract & Master Clause Library", "Select Template" (with a "Master Services Agreement Template" option), "Import/Export", and "Summary". The main document area shows a "THIS MASTER SERVICES AGREEMENT" template with fields for "Effective Date" and "Parties". The parties listed are "ATB FINANCIAL ('ATB') and Global Insights Inc (the 'Vendor')". The document text states: "ATB wishes to engage the Vendor to provide certain services on the terms and conditions upon set out herein. In consideration of the promises and other good and valuable consideration referenced in this Agreement, the receipt and sufficiency of which is hereby acknowledged, the Parties agree as follows:". Below this, there are sections for "1. INTERPRETATION" and "1.01 Definitions". The "1.01 Definitions" section includes a list of terms: "a) 'Affiliate' has the meaning set out in the Business Corporations Act (Alberta) as amended;" and "b) 'Agents' means any and all representatives, employees, contractors, subcontractors, subprocessors, business advisors and legal advisors of a".