



# HICX

## Support Manual

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# Tips, tricks and hints

## Mandatory

### Organizational Information

Supplier Type \*

Standard Supplier



Mandatory fields are marked with a red asterisk. A response is required to continue.

## Action Menu



The blue square with 3 blue dots indicates that a record or element is feasible. clicking the square opens a menu of available actions.

## Blue text

### Request ID

RIV0000072

Supplier Alias or DBA

Country of incorporation

Legal Address

RIV0000067

Company Telephone

RIV0000065

SHIRER STUFF

United States of America

414 CYRA DR

MONROEVILLE, 15146, Pennsylvania, United States of America

+14124762548

### Relationship HICXID

REL0000278

REL0000283

REL0000284

### Organizational Unit

WLD - WILMERDING - OU

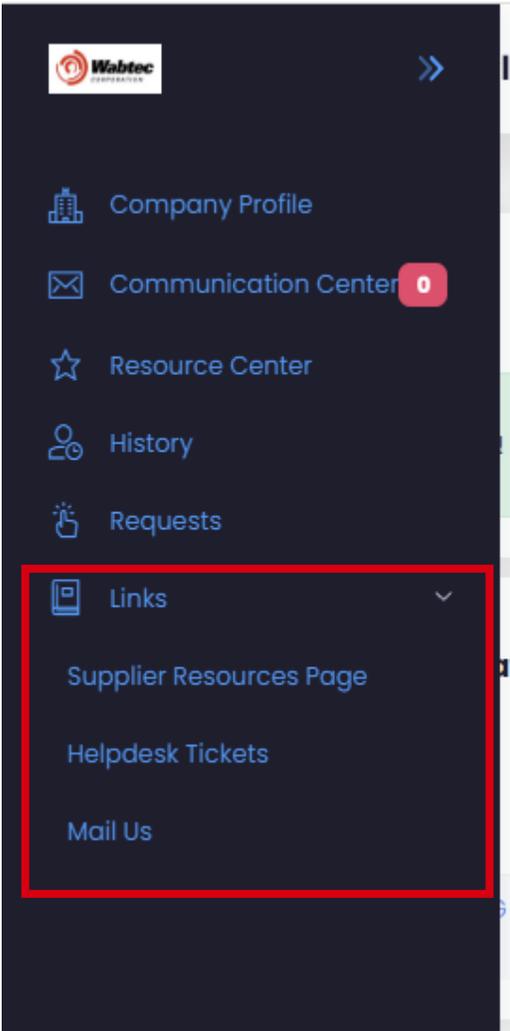
GETS - Operating Unit

AMS - Faiveley Transport Amiens

Blue text indicates that a data item can be clicked. Clicking this text opens the selected record.

# Support/Help

For links to training materials, reference documents, and help desk ticket entries, see the Links section of the navigation bar. The link to put in a Helpdesk Ticket is below as well



<https://wabtec.custhelp.com/app/source2pay>

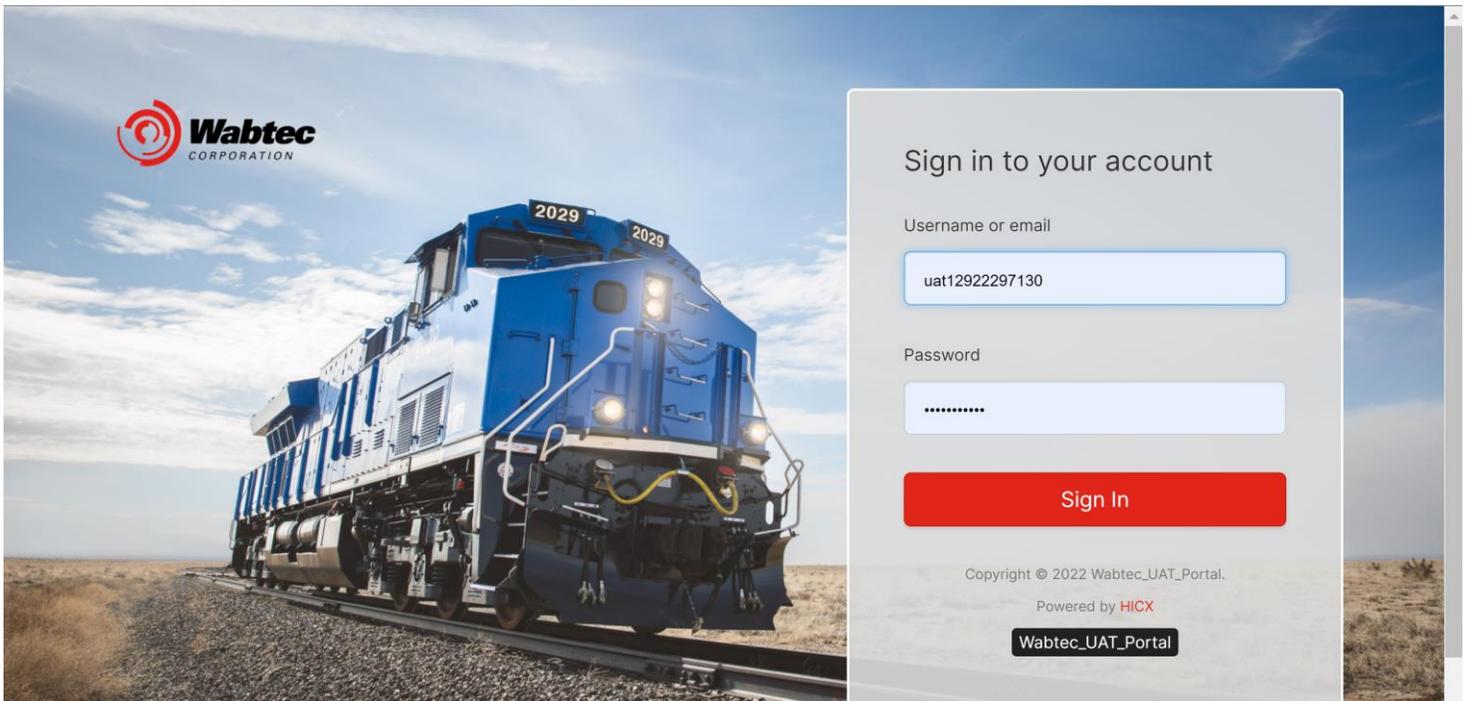
# Initiatives

Review Start Date	Initiative	Response	Expiry	Organization Unit	Mandatory	Score	Classification	Assessment	Follow Up	Actions
Dec 27, 2022	IT Inherent Risk <span>Latest</span>	PENDING		GLOBAL Master-Relationship	MANDATORY	Not Scored	NA	NA	NA	
Dec 19, 2022	Compliance Element Initiative	COMPLETED	Dec 19, 2023	GLOBAL Master-Relationship	MANDATORY	Not Scored	NO_NEED	No Need	NA	

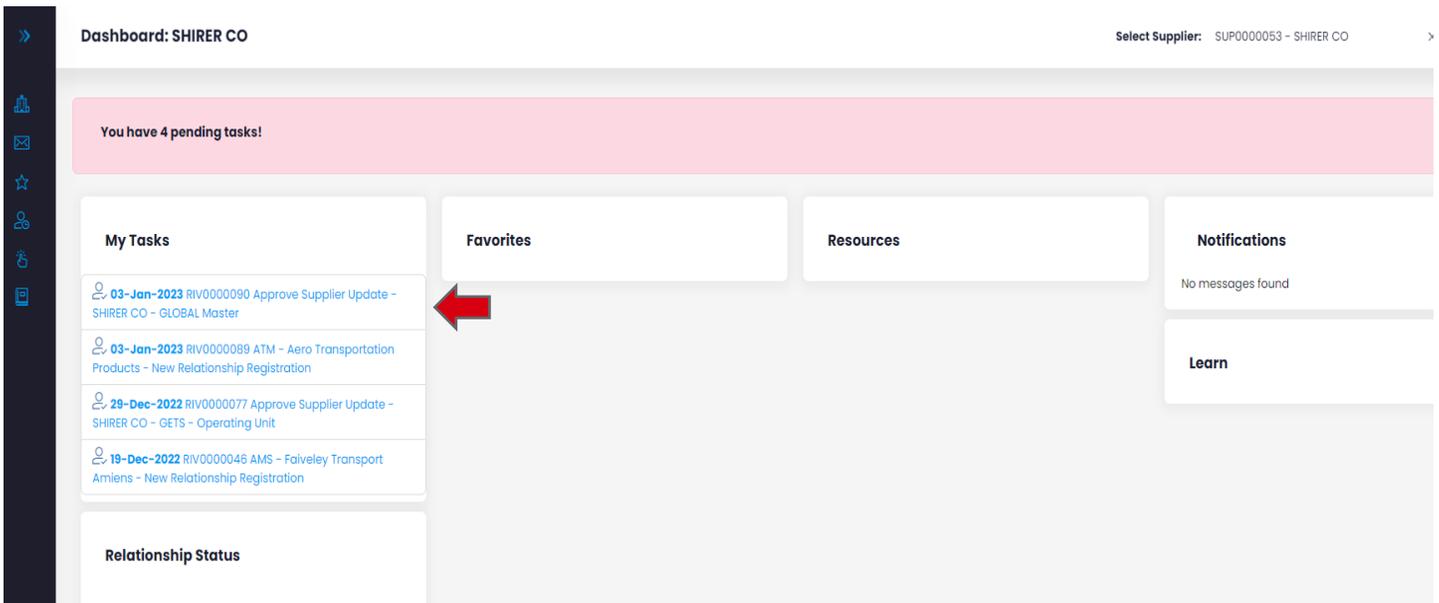
Initiatives are forms and questionnaires that allow Wabtec to collect compliance and due diligence information from a supplier or user.

# Conclusion of an Initiative

## Step 1: Log in to the HICX platform with your Wabtec credentials



## Step 2: In the My Tasks section, select the initiative you want to complete:



Step 3: View the information in the Comments section to see what information was requested for an update:

RIV000090 Approve Supplier Update - SHIRER CO - GLOBAL Master

Select Supplier: SUP000053 - SHIRER CO

Submit Data Cancel Save Draft

**Location Information**

Country of Incorporation United States of America

Location Name SALES

Location Local Language Name

Location Purpose  Purchasing  Payment  Manufacturing  RFQ Only

Email SALES@CHRISCO.COM

Address 414 CYRA DR, MONROEVILLE, 15146, Pennsylvania, United States of America

Telephone

Business Type

**Comments:**

**Task Information**  
RIV000090 Approve Supplier Update - SHIRER CO - GLOBAL Master - Pending

**Comments:** please update your address information

Step 4: Find the fields that correspond to the requested update.

RIV000090 Approve Supplier Update - SHIRER CO - GLOBAL Master

Select Supplier: SUP000053 - SHIRER CO

Submit Data Cancel Save Draft

**Location Information**

Country of Incorporation United States of America

Location Name SALES

Location Local Language Name

Location Purpose  Purchasing  Payment  Manufacturing  RFQ Only

Email SALES@CHRISCO.COM

Address 414 CYRA DR, MONROEVILLE, 15146, Pennsylvania, United States of America

Telephone

Business Type

**Comments:**

**Task Information**  
RIV000090 Approve Supplier Update - SHIRER CO - GLOBAL Master - Pending

**Comments:** please update your address information

Continue to the next page

Step 5: Update the information in the required fields, select "Send Data" after completion:

RIV0000090 Approve Supplier Update - SHIRER CO - GLOBAL Master Select Supplier: SUP0000053 - SHIRER CO

**Submit Data** Cancel Save Draft

### Location Information

Country of Incorporation ? United States of America x v

Location Name \* SALES

Location Local Language Name ?

Location Purpose ?

- Purchasing
- Payment
- Manufacturing
- RFQ Only

Email ? SALES@CHRISCO.COM 

Address ? 1234 WATER STREET, ERIE, 16509, Pennsylvania, United States of America x v +

Telephone ?

Business Type ? Select an option v

Tangible Flag ? Select an option v

### Comments:

The requested information has been updated.

### Task Information

RIV0000090 Approve Supplier Update - SHIRER CO - GLOBAL Master - Pending

**Comments:** please update your address information

# Filling out the Registration Form

Step 1: Log in to the HICX platform with your Wabtec credentials

Step 2: Acceptance of HICX End User License Agreement

**HICX End User License Agreement (EULA)**

Welcome, and thank you for your interest in HICX ("HICX," "we," "our" or "us") and our website at <https://wabtec-uat.hicxsolutions.net/wabtec/hicxsm-portal>, along with our related websites, networks, applications, mobile applications, and other services provided by us (collectively, the "Service"). This End User License Agreement ("Agreement" or "EULA") and the Privacy Policy govern your use of the Service. This Agreement is a legally binding contract between you and us regarding your use of the Service.

**PLEASE READ THE FOLLOWING TERMS AND CONDITIONS CAREFULLY.**

By clicking "**I Agree**" (or words to similar effect during the registration process) or by otherwise accessing or using the Service, you agree that you have read and understood, and, as a condition to your use of the Service, you agree to be bound by this Agreement. If you are not eligible, or do not agree to be bound by this Agreement, then you do not have our permission to use the Service. Your use of the Service, and our provision of the Service to you and express license for you to use Service, constitute an agreement between us and you to be bound by this Agreement.

Username: jsmith298939  
Supplier Name: SMITH SUPPLY

I Disagree | **I Agree**

Step 3: Agree to the Wabtec Privacy Policy.

**Privacy policy**

**Privacy Policy**

Wabtec Corporation and its wholly and majority-owned entities (collectively "Wabtec", "we" or "us"), respect your concerns about privacy. References in this Privacy Policy to "Wabtec", "we", "us", and "our" are references to the entity responsible for the processing of your Personal Data, which generally is the entity that obtains your Personal Data.

This Privacy Policy applies to the Personal Data we obtain through Wabtec's properties, including websites, mobile applications and social media pages that reference and link to this Privacy Policy ("**Online Channels**"). This Privacy Policy does not apply to products and services that reference and link to separate privacy policies.

This Privacy Policy describes the types of Personal Data we obtain through the Online Channels, how we may use that Personal Data, with whom we may share it, and how you may exercise your rights regarding our processing of the Personal Data. The Privacy Policy also describes the measures we take to safeguard the Personal Data we obtain and how you can contact us about our privacy practices.

Username: jsmith298939  
Supplier Name: SMITH SUPPLY

I Disagree | **I Agree**

Step 4: On the Welcome screen, scroll down until you see My Tasks. Select the blue link for New Relationship Registration. .

You have 1 pending tasks!

**My Tasks**

🔗 29-Dec-2022 RIV0000079 GETS - Operating Unit - New Relationship Registration



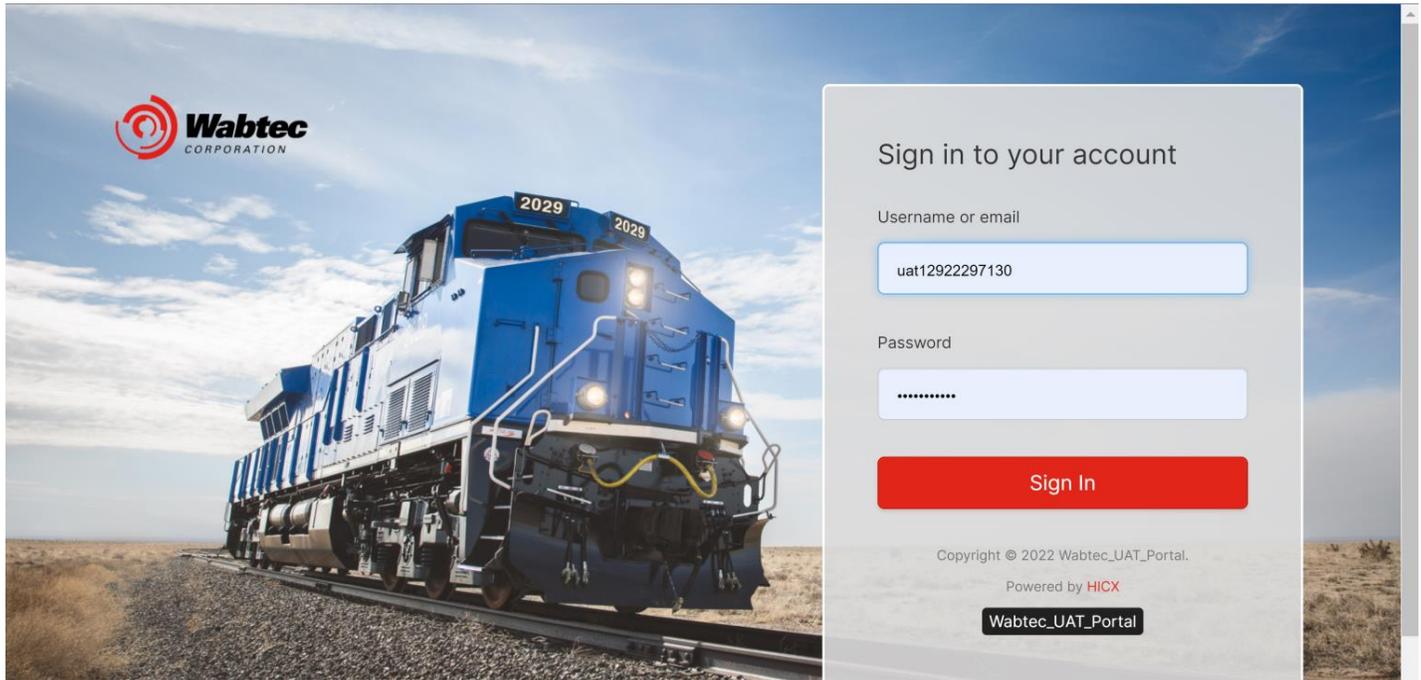
Step 5: Fill out the form provided and after filling it out, select "Send Data".

The screenshot shows a web application interface for a 'New Relationship Registration' form. At the top, there is a header with a logo on the left, the text 'Select Supplier: SUP0000058 - SMITH SUPPLY' in the center, and a close button on the right. Below the header are three buttons: 'Submit Data' (blue), 'Cancel', and 'Save Draft'. The main content area is titled 'RIV0000079 GETS - Operating Unit - New Relationship Registration'. On the left, under the 'Overview' section, there are several input fields: 'Supplier Name \*' with the value 'SMITH SUPPLY', 'Name Local' with a help icon, 'Supplier Alias or DBA', 'Country of incorporation \*' with a dropdown menu showing 'United States of America', 'Date of Incorporation' with a help icon and a calendar icon, and 'Legal Address \*' with the value '1234 WATER STREET EPIE 16509 Pen'. On the right, there is a 'Comments:' section with a text area and a 'Task Information' box containing the text 'RIV0000079 GETS - Operating Unit - New Relationship Registration - Pending'.

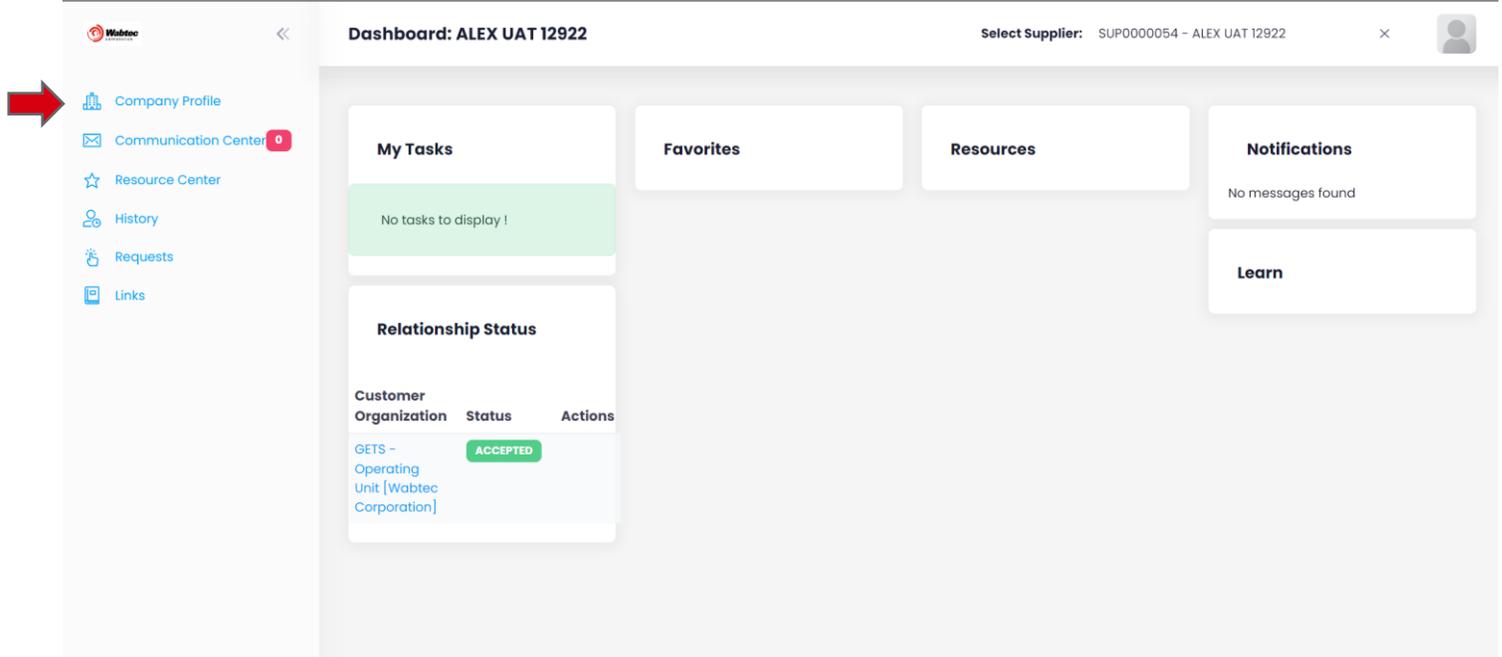
# Changes to suppliers

# Changes to suppliers

Step 1: Log in to the HICX platform with your Wabtec credentials



Step 2: On the left side, choose "Company Profile":



Continue to the next page



Step 3: Select the information you want to edit on the tab at the top of the company profile:

The screenshot shows the 'Company Profile' page for supplier 'ALEX UAT 12922'. The 'Locations' tab is selected and highlighted with a red box. The page is divided into three main sections: 'Legal Entity', 'Organization Information', and 'Initiatives'. The 'Locations' section contains a table with one entry: '12922 UAT STREET, ERIE, 16509, Pennsylvania, United States of America' with a tag 'In Use' and a location type of 'Purchasing,Payment'. An '+Add' button is visible in the top right of the 'Locations' section. The 'Initiatives' section shows a list of completed initiatives such as 'IT Intake', 'CMRT', and 'Data Privacy Initiative'.

Step 4a: Locations – To add a location, select "Add" to update information, select the three dots under Actions.

This screenshot is similar to the previous one but highlights the steps for adding a location. A red arrow points to the '+Add' button in the top right of the 'Locations' section. Another red arrow points to the three dots icon in the 'Actions' column of the location table.

Continue to the next page

## Step 4b: Locations – Select the "Update" option from the drop-down menu.

The screenshot shows the 'Company Profile' page for supplier 'SUP0000054 - ALEX UAT 12922'. The 'Locations' tab is active, displaying a table with the following data:

Description	Tags	SAP Vendor ID	Location Type	Actions
12922 UAT STREET ERIE, 16509, Pennsylvania, United States of America	In Use		Purchasing,Payment	<a href="#">Update</a> <a href="#">Mark Out-Of-Use</a>

A red arrow points to the 'Update' option in the actions dropdown menu.

## Step 4c: Locations - Fill out the form provided and then select "Validate".

The screenshot shows the 'Update Location' form. A red arrow points to the 'Validate' button. The form includes the following fields:

- Country of Incorporation: United States of America
- Location Name: ALEX LERCH
- Location Local Language Name: (empty)
- Location Purpose:  Purchasing,  Payment,  Manufacturing,  RFQ Only
- Email: UAT12922@GMAIL.COM
- Address: 12922 UAT STREET, ERIE, 16509, Pennsylvania, United States of America
- Telephone: (empty)

The 'Reason for Change' field is highlighted in yellow.

Continue to the next page

Step 4d: Locations - You will see a confirmation once the validation is complete.

Validation was successful. Click complete to save changes. ✕

**Complete** **Cancel**

**Reason for Change:** Training 12.29.22

### Location Information

HICX_ID	LOC0000856
Country of Incorporation	United States of America
Location Status	Active
Location Name	ALEX LERCH
Location Local Language Name	
Location Purpose	Purchasing Payment
Email	UAT12922@GMAIL.COM
Address	12922 UAT STREET ERIE, 16509, Pennsylvania, United States of America
Telephone	+18148232499

Step 5a: Bank Accounts – Select "Bank Accounts" on the tab at the top of the page.

**Company Profile** Select Supplier: SUP0000054 - ALEX UAT 12922 ✕ 

**Legal Entity** Update

### Organization Information

Master Supplier ID: SUP0000054  
Supplier Name: ALEX UAT 12922  
Supplier Alias or DBA: ALEX UAT 12922  
Supplier D&B Number:   
Country of Incorporation: United States of America  
Physical Address: 12922 UAT STREET  
ERIE, 16509, Pennsylvania, United States of America  
Telephone Number: +18148232499  
Email:   
Website:   
Company:

**Bank Accounts** +Add

Description	Actions
Alexander Lerch <span>Active</span>	<span>⋮</span>

### Initiatives

Section	Status	Action
IT Intake	Completed	
CMRT	Completed	
IT Inherent Risk	Completed	
Data Privacy Initiative	Completed	
Compliance Element Initiative	Completed	
Finance Initiative	Completed	
SCS	Completed	

Continue to the next page 

Step 5b: Bank Accounts – To add a bank account, select "Add" to update information, select the three dots under Actions. .

**Company Profile** Select Supplier: SUP0000054 - ALEX UAT 12922

Locations **Bank Accounts** Contacts Addresses

**Legal Entity** [Update](#)

**Organization Information**

Master Supplier ID: **SUP0000054**

Supplier Name: **ALEX UAT 12922**

Supplier Alias or DBA: **ALEX UAT 12922**

Supplier D&B Number

Country of Incorporation: **United States of America**

Physical Address: **12922 UAT STREET, ERIE, 16509, Pennsylvania, United States of America**

Telephone Number: **+18148232499**

Email

Website

Company

**Bank Accounts**

Description	Actions
Alexander Lerch <span>Active</span>	<a href="#">+Add</a> <a href="#">⋮</a>

**Initiatives**

Section	Status	Action
IT Intake	Completed	
CMRT	Completed	
IT Inherent Risk	Completed	
Data Privacy Initiative	Completed	
Compliance Element Initiative	Completed	
Finance Initiative	Completed	
SCS	Completed	

Continue to the next page



Step 5d: Bank Accounts – Fill out the form provided and select "Save".

Update

Reason for change:

**Bank Account**

Bank Country \*

Account Currency \*

Bank Search (by name, BIC or National ID - ABA, BSB, CNAPS, Transit, Sort Code, etc.)

Bank Name

Branch Name

Street Address

City

State/Province/Region

Zip/Postal Code

**Save** **Cancel**

Step 6a: Contacts - Select "Contacts" at the top of the page.

Company Profile

Select Supplier: SUP0000054 - ALEX UAT 12922

Locations Bank Accounts **Contacts** Addresses

**Legal Entity**

**Organization Information**

Master Supplier ID: SUP0000054

Supplier Name: ALEX UAT 12922

Supplier Alias or DBA: ALEX UAT 12922

Supplier D&B Number

Country of Incorporation: United States of America

Physical Address: 12922 UAT STREET, ERIE, 16509, Pennsylvania, United States of America

Telephone Number: +18148232499

Email

Website

Company Employees

**Contacts**

Description

Alexander LERCH Default

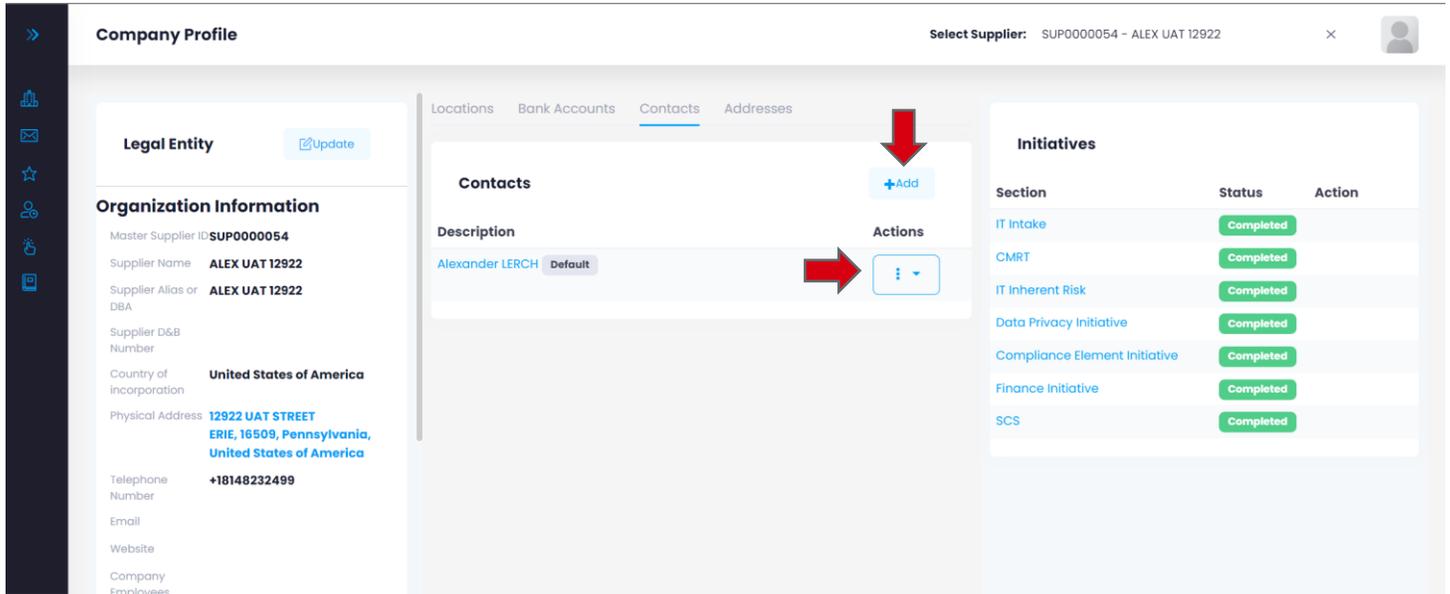
**Initiatives**

Section	Status	Action
IT Intake	Completed	
CMRT	Completed	
IT Inherent Risk	Completed	
Data Privacy Initiative	Completed	
Compliance Element Initiative	Completed	
Finance Initiative	Completed	
SCS	Completed	

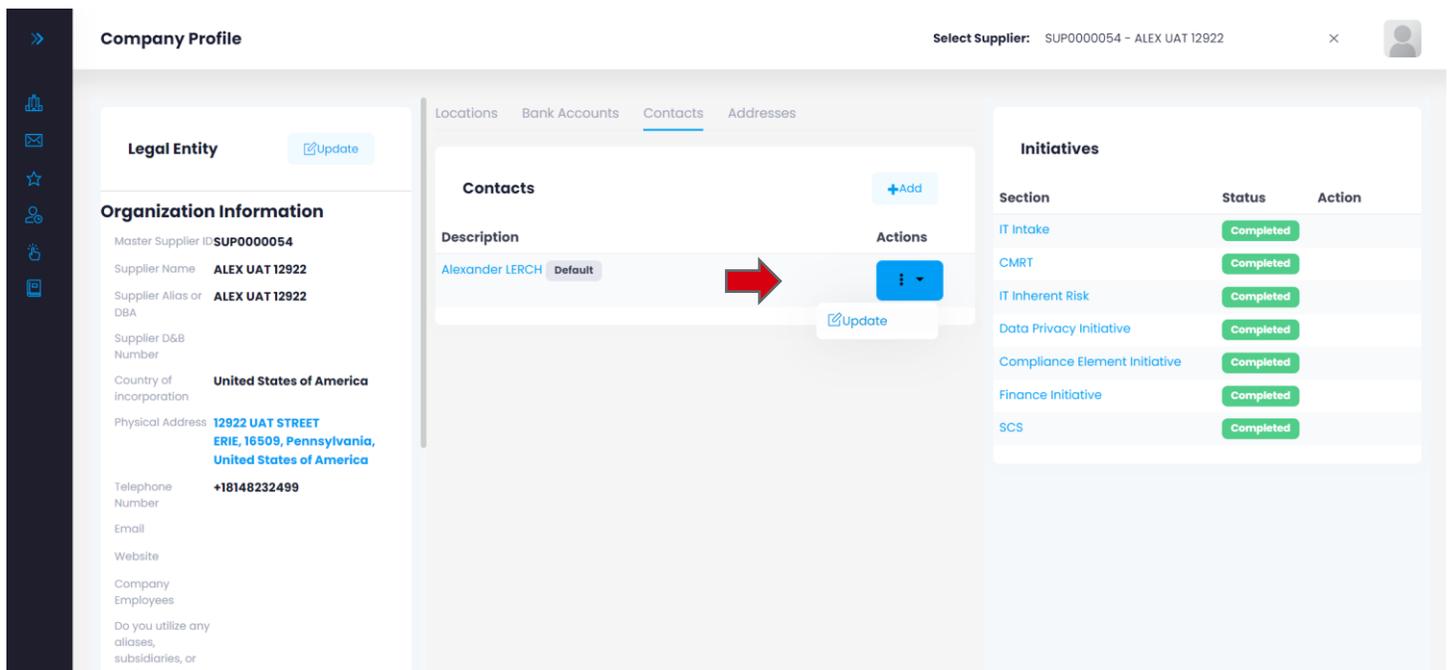
Continue to the next page



Step 6b: Contacts – To add a contact, select "Add" to update the contact information, select the three dots under the "Actions" tab.



Step 6c: **Contacts**- To update contact information select "Update" from the drop-down menu.



Continue to the next page

Step 6d: **Contacts**- Complete the provided form and select "Validate" once finished.

The screenshot shows the 'Company Profile' page with the 'Contacts' tab selected. A blue banner at the top reads: "Complete the form below by entering primary contact information. All fields marked with a \* are mandatory." Below this banner are two buttons: "Validate" (highlighted with a red arrow) and "Cancel". The form contains the following fields:

- First Name \*: Alexander
- Last Name \*: LERCH
- Email \*: uat12922@gmail.com
- Position: (empty)
- Telephone \*: (201) 555-0123
- Fax: (empty)
- Communication Language: en - English
- Organization Unit(s):  GETS - Operating Unit

Step 7a: **Addresses**- Select "Addresses" from the tab at the top of the page.

The screenshot shows the 'Company Profile' page with the 'Addresses' tab selected. A red arrow points to the 'Addresses' tab in the top navigation bar. The page is divided into three main sections:

- Legal Entity**: Includes fields for Master Supplier ID (SUP0000054), Supplier Name (ALEX UAT 12922), Supplier Alias or DBA (ALEX UAT 12922), Supplier D&B Number, Country of Incorporation (United States of America), Physical Address (12922 UAT STREET, ERIE, 16509, Pennsylvania, United States of America), Telephone Number (+18148232499), Email, Website, Company Employees, and a question about utilizing aliases or subsidiaries.
- Address Book**: Contains one address entry: "12922 UAT STREET, ERIE, 16509, Pennsylvania, United States of America". There is an "+Add" button.
- Initiatives**: A table with the following data:

Section	Status	Action
IT Intake	Completed	
CMRT	Completed	
IT Inherent Risk	Completed	
Data Privacy Initiative	Completed	
Compliance Element Initiative	Completed	
Finance Initiative	Completed	
SCS	Completed	

Continue to the next page



Step 7b: **Addresses**- To add a new address to the company profile, select "Add".

The screenshot shows the 'Company Profile' page for supplier 'SUP0000054 - ALEX UAT 12922'. The 'Addresses' tab is selected. On the left, 'Organization Information' is displayed, including the supplier name 'ALEX UAT 12922' and physical address '12922 UAT STREET, ERIE, 16509, Pennsylvania, United States of America'. The 'Address Book' section contains one entry with the same address. A red arrow points to the '+Add' button in the top right of the 'Address Book' section. To the right, an 'Initiatives' table lists several completed sections.

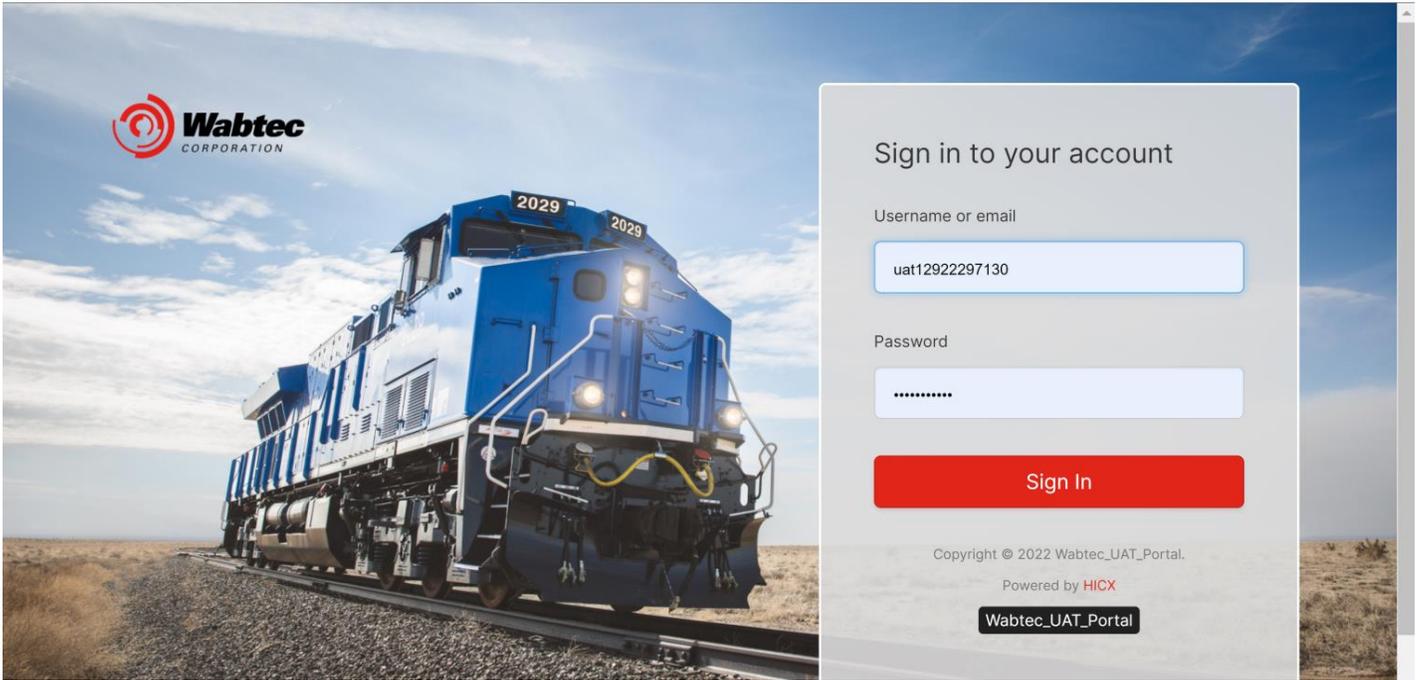
Section	Status	Action
IT Intake	Completed	
CMRT	Completed	
IT Inherent Risk	Completed	
Data Privacy Initiative	Completed	
Compliance Element Initiative	Completed	
Finance Initiative	Completed	
SCS	Completed	

Step 7c: **Addresses**- Complete the provided form, then select "Submit" .

The screenshot shows the 'Address Details' form for adding a new address. The form includes fields for 'External Id', 'HICX\_ID', 'Country' (a dropdown menu), 'Address Line 1', 'Address Line 2', 'City', 'Region/State/Province' (a dropdown menu), and 'Zip/Postal Code'. There are 'Submit' and 'Cancel' buttons at the top and bottom of the form. A red arrow points to the top 'Submit' button. The left sidebar shows navigation options like 'Company Profile', 'Communication Center', 'Resource Center', 'History', 'Requests', and 'Links'.

# Responding to Change Requests

## Step 1: Log into the HICX platform using your Wabtec Credentials



## Step 2: From the main dashboard, select the change request you would like to complete:

**Dashboard: SHIRER CO** Select Supplier: SUP0000053 - SHIRER CO

You have 3 pending tasks!

**My Tasks** My Tasks

- 03-Jan-2023 RIV0000088 Approve Supplier Update - SHIRER CO - GLOBAL Master
- 29-Dec-2022 RIV0000077 Approve Supplier Update - SHIRER CO - GETS - Operating Unit
- 19-Dec-2022 RIV0000046 AMS - Faiveley Transport Amiens - New Relationship Registration

**Relationship Status**

Customer Organization	Status	Actions
AMS - Faiveley Transport Amiens [Wabtec Corporation]	STARTED	
GETS - Operating Unit [Wabtec Corporation]	ACCEPTED	



Step 3: Complete the provided form and select "Submit Data" when finished.

RIV0000088 Approve Supplier Update - SHIRER CO - GLOBAL Master

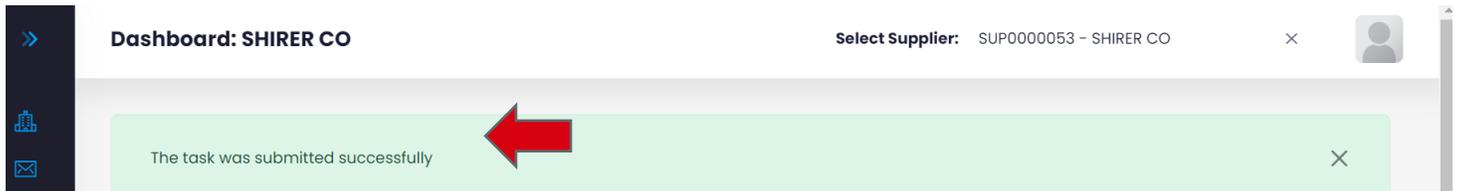
Select Supplier: SUP0000053 - SHIRER CO

Submit Data Cancel Save Draft

### Organization Information

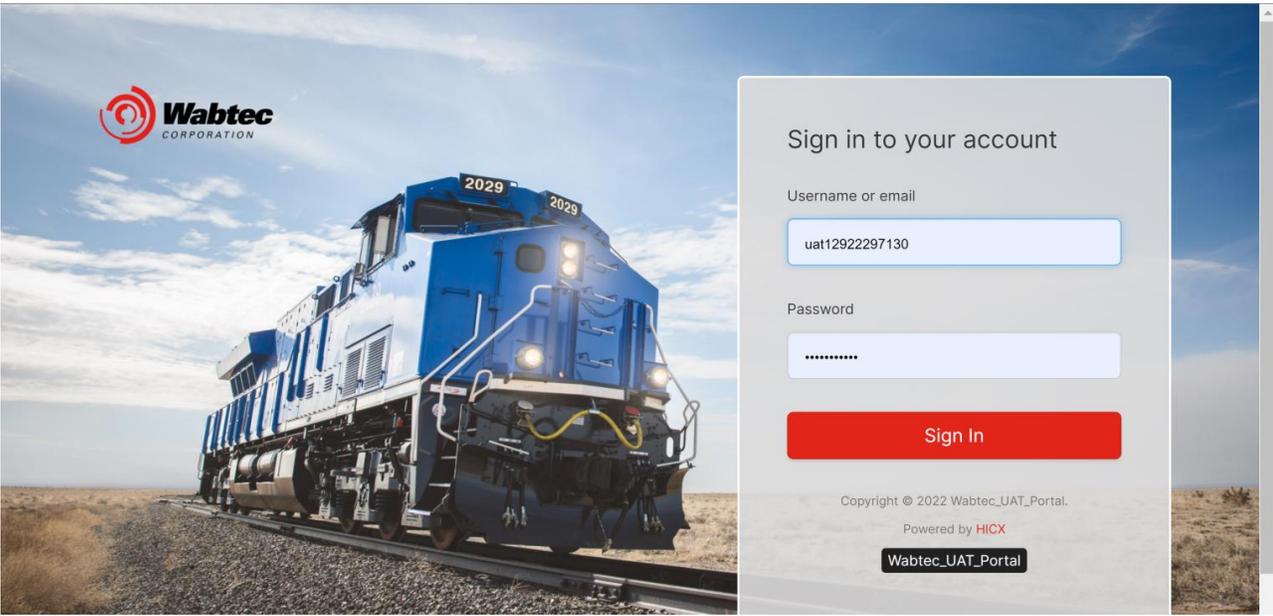
Master Supplier ID	SUP0000053
Supplier Name	SHIRER CO
Supplier Alias or DBA	SHIRER STUFF
Supplier D&B Number	123456789
Country of incorporation	
Physical Address	
Telephone Number	+14124762548

Step 4: Once the updated information has been submitted, you will receive confirmation on your dashboard:

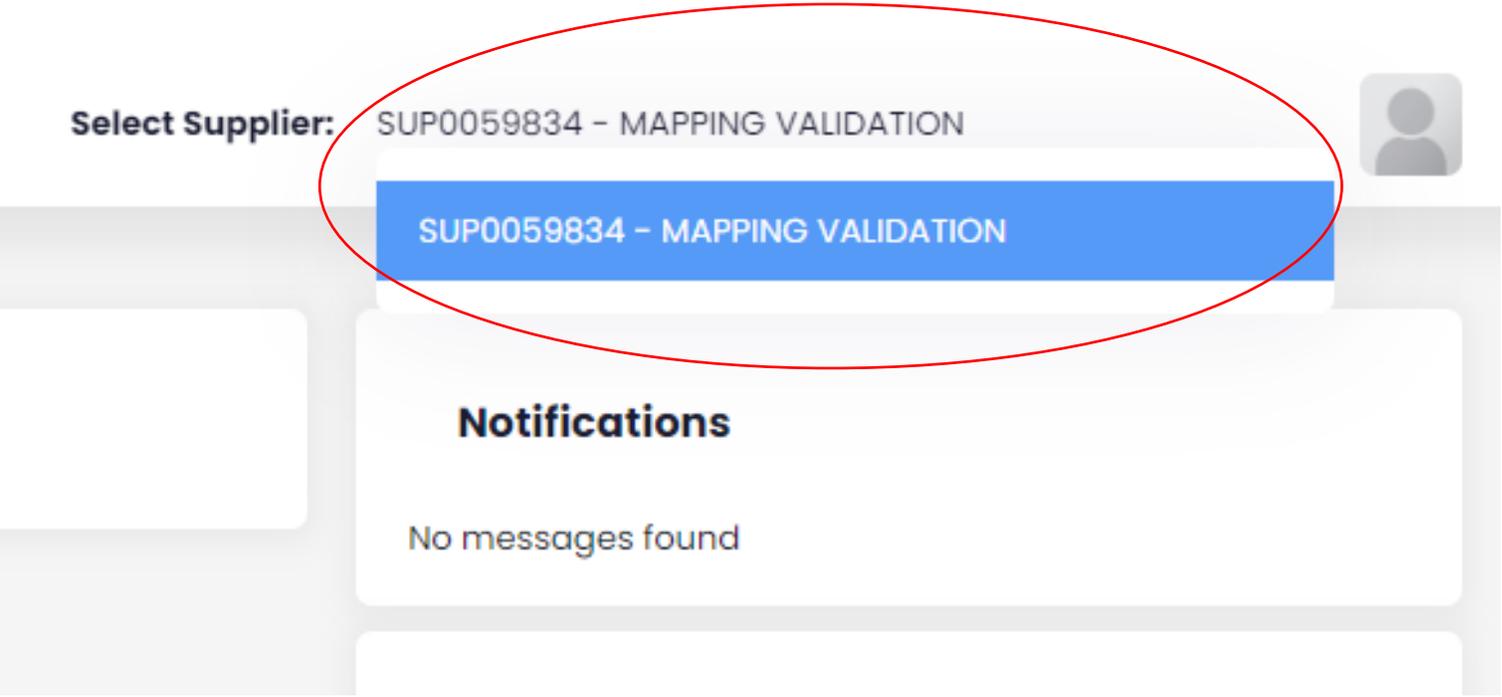


# Toggle Between Supplier Records

Step 1: Log into the HICX platform using your Okta Credentials



Step 2: From the HICX Dashboard click the code starting with SUP to the right where it says “Select Supplier”

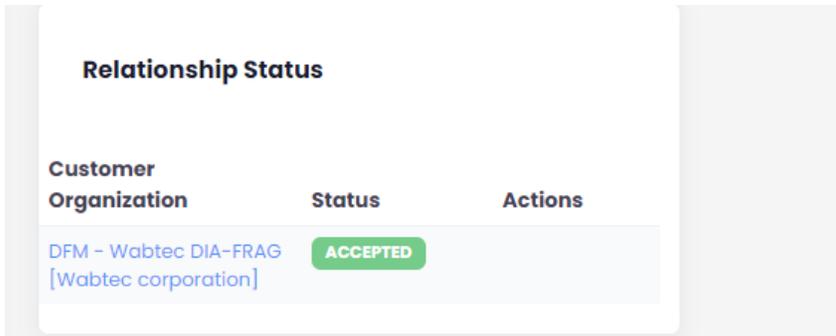


Step 4: A drop-down menu will appear and that is where you click on what supplier profile you want to navigate through

# Check Operating Unit

**Step 1:** Log into the HICX platform using your Okta Credentials

**Step 2:** From the HICX Dashboard you will see all your operating units under “Relationship Status”



**Step 3: IF YOU ARE MISSING AN OPERATING UNIT** Go to this link to raise a ticket <https://wabtec.custhelp.com/app/source2pay>

**Step 4:** Fill out all the information with the red \*

**Step 3:** In the “Please provide a brief but detailed subject for your ticket” Type that you want to add an organization unit and list the ones you want to add

**Step 4:** Under the issue category go to “Other Supplier Related Issues”

**Step 5:** Click submit once completed.

Application \*

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Please select an item under Other Supplier related Issue

Yes  No

Attach Documents

Choose File No file chosen



# Remove Contact

Step 1: Go to this link to raise a ticket

<https://wabtec.custhelp.com/app/source2pay>

Step 2: Fill out all the information with the red \*

Step 3: In the “Please provide a brief but detailed subject for your ticket” Type that you want to remove a contact and list the contact names you want removed

Step 4: Under the issue category go to “Other”

Step 5: Click submit once completed.



Application \*

HICX

CC/Copy (Multiple mail id's can be given seperated by ; )

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Please select an item under Other

Other

Yes  No

Attach Documents

Choose File No file chosen

# Remove Bank Account

Step 1: Go to this link to raise a ticket

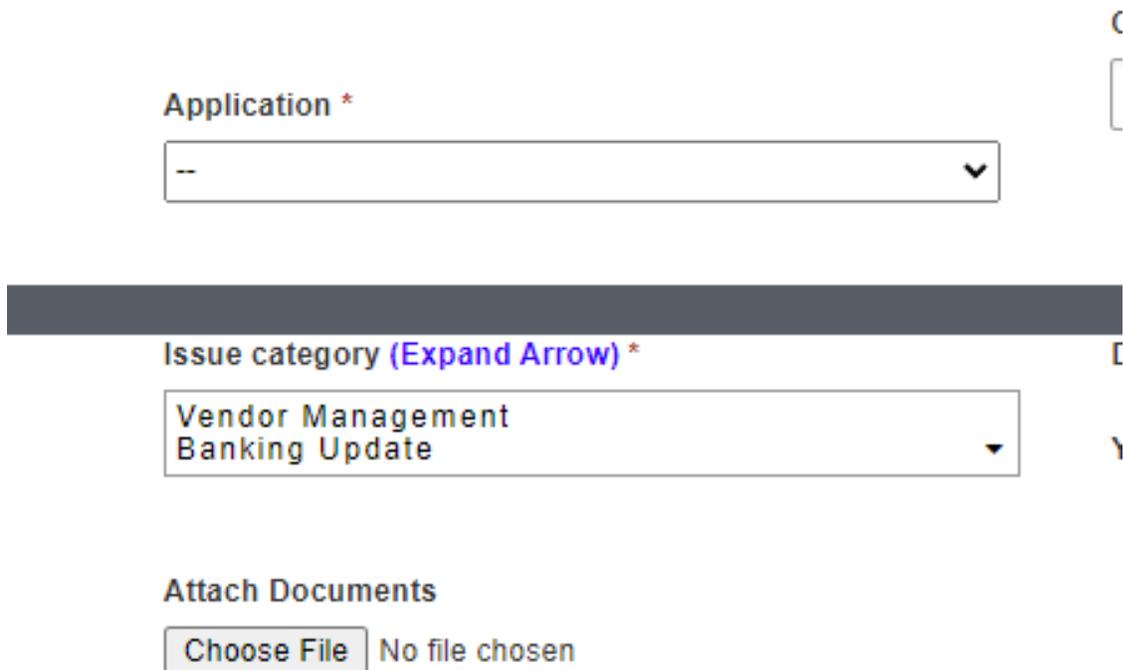
<https://wabtec.custhelp.com/app/source2pay>

Step 2: Fill out all the information with the red \*

Step 3: List BAC Number that needs to be deleted under “Please provide a brief but detailed subject for your ticket”

Step 4: Under the issue category go to “Vendor Management” then click “Banking Update”

Step 5: Click submit once completed.



The screenshot shows a web form with several fields. The 'Application' field is highlighted with a red asterisk. The 'Issue category (Expand Arrow)' field is also highlighted with a red asterisk and contains the text 'Vendor Management' and 'Banking Update'. The 'Attach Documents' section has a 'Choose File' button and the text 'No file chosen'. There are some faint markings on the right side of the form, including a 'C' and a '[' bracket.

Application \*

--

Issue category (Expand Arrow) \*

Vendor Management  
Banking Update

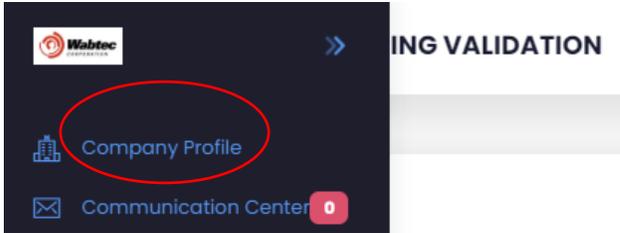
Attach Documents

Choose File No file chosen

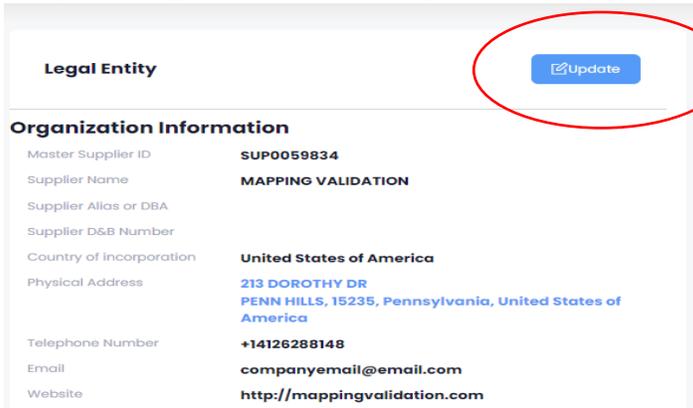
# Add A Tax Document

Step 1: Log into the HICX platform using your Okta Credentials

Step 2: From the HICX Dashboard, select “company profile” from the task board on the left side



Step 3: Right next to “Legal Entity” click “Update”



Step 4: Under “Tax Information” you can fill out and upload your tax information

A screenshot of the 'Tax Information' form. The form has a title 'Tax Information Information' and a help icon. It contains several fields: 'Legal Structure' (dropdown menu with 'C Corporation' selected), 'Tax Number' (text input with '116688779'), 'Upload a copy of your tax certificate' (with an 'Upload Document' button), 'Tax Classification' (dropdown menu with 'Select an option'), 'Upload Tax Exempt Documents' (with an 'Upload Document' button), 'Are you exempt from or subject to reduced rate of withholding tax in this country?' (dropdown menu with 'No'), 'Are you providing non-tangible goods and/or services that will be performed in the United States?' (dropdown menu with 'No'), 'Upload W8' (with an 'Upload Document' button), 'Upload W9' (with a 'View Document' button and a dropdown arrow), and 'Do you require a 1099?' (dropdown menu with 'No').

Step 5: Once done scroll to the bottom and click “Submit”