Guide for registration to an Operators List

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Information

Version

<table>
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<tr>
<th>Version</th>
<th>Date</th>
<th>Text edited</th>
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<tbody>
<tr>
<td>1.0</td>
<td>23/11/17</td>
<td>First version of the document</td>
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<tr>
<td>2.0</td>
<td>16/03/2020</td>
<td>Example tab updated and typing errors are corrected. The paragraph “5 Registration renewal” is added.</td>
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<tr>
<td>3.0</td>
<td>01/07/2020</td>
<td>The paragraph “1.1 Browsing the platform” is added.</td>
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Purpose

The document aims to describe how an economic operator can register to an operator list using the “Appalti&Contratti e-Procurement” platform.

References

<table>
<thead>
<tr>
<th>References</th>
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</thead>
<tbody>
<tr>
<td>1. Technical procedures for using the electronic platform and access the reserved area</td>
</tr>
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Definitions – acronyms – glossary

<table>
<thead>
<tr>
<th>Definition</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Procurement Platform</td>
<td>The system (software and hardware) through which it is possible to carry out tender procedures entirely managed digitally in compliance with the provisions of the “Codice dei contratti pubblici” (Dlgs 50/2016)</td>
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<tr>
<td>Error. L’origine riferimento non è stata trovata.</td>
<td>Explicit reference to the name of the Contracting Authority digital platform</td>
</tr>
<tr>
<td>Digital, telematic Platform</td>
<td>Synonym of “Procurement platform”</td>
</tr>
<tr>
<td>Procurement Portal</td>
<td>A procurement platform component offering specific functions for economic operators</td>
</tr>
<tr>
<td>Economic operator</td>
<td>Please refer to the definition given in “Codice degli appalti pubblici” (Dlgs 50/2016)</td>
</tr>
<tr>
<td>Tender, procedure</td>
<td>Tenders, public or reserved, published and completed on the procurement platform</td>
</tr>
<tr>
<td>User</td>
<td>The economic operator “user” of the telematic, digital platform</td>
</tr>
</tbody>
</table>
1 Prerequisites

To access the telematic platform “Appalti&Contratti e-Procurement” you must have already signed in and received the login credentials to access the reserved area of the Procurement Portal.

To know the technical procedures, how to sign in and access the telematic platform Appalti&Contratti e-Procurement, please refer to the “Technical procedures for using the electronic platform and access the reserved area” manual that you can find in the section “Attachments” as shown below.

1.1 Browsing the platform

To navigate contents and pages use contextual instructions, functions and menus:
It is recommended to **not use** directional arrows in your browser:

If you use a directional arrow (or a built-in browser function) to perform back and forward actions through the pages, it will trigger an error page like shown below:

**Operation or navigation of the application is not allowed**

For safety reasons some operations cannot be done, in particular:

1. using the browser’s “Back” button: navigation must take place exclusively using the application links
2. using the browser’s “Update” / “Reload current page” (or F5) command: a request already sent will be discarded if sent again
3. double click on the buttons (save, send, etc...); similar to the previous case
4. opening of new “Navigation Tabs” on the platform: navigation must take place in the only page open on the platform

See further details in the user manuals.

In case you view this page, navigation must restart from the homepage.

In this case, click on “Go to the home page” and after that you will be able to browse the site again.

Please, consider as well to **not** duplicate browser tabs neither opening more than one at a time; always browse web contents in a single browser tab, even after logging in.
2 Submit an application for registration to a List

2.1 Access the reserved area

To interact with the Contracting Authority, you must access the reserved area of the platform **Errore. L’origine riferimento non è stata trovata.** (see paragraph 1). Login using the credentials (username and password) you created in the registration process and click on “OK”.

2.2 “Open” registration notices

When you have logged-in successfully click on “Announcements and notices of registration” as shown below. It is possible to submit a request for registration to an operator list only if it results in “Status: open”.

Click on “View detail” to access the announcement/notice detail.
Here you can view the detail of the announcement or notice of registration, all the documents related to it and any communications added by the Contracting Authority. See the example below:

**Contracting authority**

*Name: Comune di Springfield*

*Responsible list: Bonaparte Napoleone*

**General data**

- **Tender/Notice title:** [ENG] Test list
- **List for:** Services
- **Date of publication:** 16/05/2022
- **Validity:** from 16/05/2022
- **Registration opening date:** 16/05/2022 from 15:00
- **Registration closing date:** 15/08/2022 by 15:00
- **Procedure reference:** 000037
- **Tender status:** Open

The validity shows the period within which the Contracting Authority can invite the registered economic operators.

The opening and closing (if provided) dates establish the period within which the economic operator can submit the application for registration.

Here you can view the information about the categories of registration and the list (if available) of the economic operators already in the register of suppliers.

Here you can download all the documents related to the announcement or notice and any attachments included.

Here you can view the communications with the Contracting Authority.

Click on "Request for registration" to submit your request for registration to the list.

Please note that you can view the "Confidential communications to the competitor" section, the "Requests sent" section and the "Request for registration" button only if you are logged-in to your reserved area.
2.3  Proceed with a “Request for registration”

In the “Announcements and notices of registration” section, proceed by clicking on “Registration request” at the bottom of the page.

Just follow the wizard and you will compile all the information required step by step.

2.3.1  Confirm your Master Data

The first step summarises the master data you entered in the signing in process. If it is necessary to edit or update your data, click on “Edit” and refer to the instructions explained in the “Technical procedures for using the electronic platform and access the reserved area” manual.

If your data are correct, proceed by clicking on “Next”.

[Diagram of Request for registration to operators list with master data and options to edit, next, or cancel]
2.3.2 Form of participation
The “Form of participation” step is available only if the announcement or notice of registration provides the possibility to participate as a single or as a temporary grouping of operators.

Please refer to the instructions in the announcement or notice of registration about the form of participation.

**ATTENTION:** in this phase we refer to the possibility to register to the list as a temporary grouping (RTI). In this case you will be invited to participate in a tender as a grouping. On the contrary, if you register as a single you can choose to submit your offer in a tender as a grouping after having started the compilation of the offer.

2.3.3 Participation as a temporary grouping of operators
If the form of participation as a temporary grouping is available and you want to participate in this form, after have chosen this option, you must indicate a conventional name for the grouping (for example, you can indicate the name of every single operator which constitutes the grouping).
2.3.4 Grouping components
When registering as a grouping, you can view the “Grouping components” section in which the "group leader" or "agent" of the group can enter the other members.

Enter each member data and click on "Add" when completed.
2.3.5 Selection of categories

By proceeding with “Next” you can select the categories and the classifications which you intend to register in.
Tick every category of your interests and specify the classification.

Proceed with “Next” to view the summary of the categories/classifications chosen.
2.3.6 Download request for registration

After you have chosen the categories, in case of grouping, you can specify the signatories of the request for registration as shown below.
By clicking on "Generate PDF" you can download the PDF file containing all the master data and the list of the categories you have chosen.

When you have entered all the data, click on "Update".
Proceed and digitally sign the PDF file: pay attention to the format indicated in the announcement/notice of registration (es: P7M).

In case of grouping the file must be signed by the signatories of each member of the grouping.
2.3.7 Documents required

In "Documents required" you can upload all the documents required in the request for registration, especially with regards to the PDF file (digitally signed) created in the previous phase.

For each file, click on "Browse…", then choose the file (the name is displayed in the "Attachment" column, see example below) and click on "Attach".

**ATTENTION**: pay attention to attach all the documents required in the announcement/notice of registration; the list could not be complete. In this case add any other documents using the blank as described in the example below.

Always pay attention to the size limits of the single files and of the sum of all files attached, indicated under the fields. Limits can change from platform to platform.

After uploading all the documents, proceed with "Next".
2.3.8 Submit request

In the last step you can:

- Print the data you entered for an additional control
- Save a draft to continue at a later time
- Submit a request for registration by sending to the Contracting Authority all the data and files uploaded in the form of a "digital envelope".

Click on "Send request" and the system will transmit the data pack to the Contracting Authority returning a date and time of transmission message.

The platform will also send you a PEC (Certified email) with the confirmation of the submission of your application. Please save it as a proof of transmission.

According to what the Contracting Authority has chosen, you will be informed of the result of the registration via PEC (Certified email) and on the platform in the "Confidential Communications to the competitor" section.
3 Request for clarification

If you need to ask the Contracting Authority questions regarding the procedure, you must use the communication features included in the Procurement Portal. Requests for clarifications or questions must be placed within the deadlines set by the tender regulations or the invitation letter and in any case within the deadlines set by Legislative Decree 50/2016.

To send a request for clarification, in the announcement/notice details click on “New communication” as shown in the example below.

Categories

- List of categories
- Categories to which you are subscribed
- Economic operators authorized to list
- Other documents

Documentation

- List notice

Communications from the contracting authority

No communication from the contracting authority

Confidential communications to the competitor

- 0 communications received
- 0 communications archived
- 0 communications sent
- New communication

DATA/DOCUMENTS UPDATE

Back to the list
3.1 New communication

Fill in the blank by specifying in the Subject "Request for clarification" and then the text of your request (or referring to any attachments).

Proceed with “Next” and you’ll reach the “attachments” tab, where you can attach one or more files by clicking on “Browse...”. Remember to specify a description for each attachment and then click on “Attach”.

You can upload an attachment with a maximum size of 2048 KB. You have uploaded documents for 29 KB, and you can upload documents up to 5091 KB.
Proceed with "Next"; the "Summary" tab allows you to check the text of the message and the files attached before sending it to the Contracting Authority; after this check, click on "Send communication" to complete.

The process ends with a notification that the communication has been sent, tracing date and time of the operation (and if applicable, also with the reference to the protocol number assigned to the communication by the Contracting Authority). The notification of the transmission is also sent to the economic operator via email/PEC (Certified email).
3.2 Reply to requests for clarification

The replies to requests for clarifications are published on the Procurement Portal and are visible in the detail page of the announcement/notice of registration (as shown below) in the "Communications from the Contracting Authority" section.

Categories

- List of categories
- Categories to which you are subscribed
- Economic operators authorized to list
- Other documents

Documentation

- List notice

Communications from the contracting authority

Published on 16/05/2022

- R: Request for clarifications - We hereby notify the economic operator that...

Confidential communications to the competitor

- 0 communications received
- 0 communications archived
- 1 communications sent
- New communication

DATA/DOCUMENTS UPDATE

Back to the list
4 Communications between the Contracting Authority and Economic Operators

All communications between the Contracting Authority and the Economic Operator take place electronically on the Procurement Portal and via mail/PEC (Certified email) notifications.

Communications are all those made during the lifetime of the procedure, such as:
- Request for clarifications or documents related to a request for remedying deficiencies
- Communication of the acceptance or rejection of your request for registration
- Communication about the draw of the initial order number
- Invitation to a tender
- etc.

On the Procurement Portal, you can view all the communications of the Contracting Authority, answer directly or send your own communications regarding the procedure.

In the tender details page (see paragraphs 2.1 and 2.2), in the section "Confidential communications to the competitor" it is possible to view the communications received (read or unread), view the communications already sent to the Contracting Authority and send new ones. There is also a list of archived communications (the telematic platform moves communications from received to archived automatically by default after 30 days).

By clicking on "communications received" you access the list where the communication that haven’t been read yet are highlighted.
By clicking on the subject of the communication, you can access the details to read it entirely.
In the detail tab, in addition to the text, you can find also any attachments (see following image). Furthermore, if provided (depending on the type of communication), you can also use the "Reply" button to reply directly to any requests from the Contracting Authority.

**5 Registration renewal**

According to the regulation established by the Contracting Authority, when the deadline is close you have to renew your registration to the register of suppliers. Open the list detail, at the bottom of the page you can click on “Registration renewal” to access the renewal section.
Check your master data: if you need to modify them click on "Edit", if not proceed with "Next".

In the "Request for registration renewal to operators list" tab create the PDF file for your request (as already seen in the previous paragraphs).
When the file is digitally signed, upload it to the platform with any attachments required by the Contracting Authority (see example below). Attach other documents if necessary, then click on “Next” to proceed.
In the last tab you must send the renewal request, by clicking on "Send renewal".