Guide for tenderers

May 2022
# Table of Contents:

Information.......................................................................................................................... 2
Version................................................................................................................................. 2
Purpose................................................................................................................................. 2
References............................................................................................................................ 2
Definitions – acronyms – glossary......................................................................................... 2

1. How to access the digital platform.................................................................................. 3
   1.1 Browsing the Platform............................................................................................... 4

2. Tender procedures........................................................................................................... 6
   2.1 Participate in a public tender procedure .................................................................. 6
   2.2 Reserved procedure................................................................................................. 8

3. Requests for clarifications.............................................................................................. 10
   3.1 Reply to requests for clarifications.......................................................................... 13

4. Submit the offer.............................................................................................................. 14
   4.1 Compilation of the offer .......................................................................................... 15
      4.1.1 Submit the offer as a temporary grouping of operators ...................................... 18
      4.1.1 Change form of participation ............................................................................ 20
   4.2 Prepare the administrative envelope ...................................................................... 21
      4.2.1 Uploading files following a plain list of documents ........................................... 23
   4.3 Prepare the technical envelope .............................................................................. 27
      4.3.1 Compiling the technical envelope by entering values and uploading documents ........................................... 28
      4.3.1 Compiling the technical envelope only by uploading documents ...................... 32
   4.4 Prepare the economic envelope .............................................................................. 34
      4.4.1 Compiling the offer entering values and uploading documents ......................... 35
      4.4.1 Compilation of the offer by uploading documents .............................................. 48
   4.5 Summary of the offer and corrections .................................................................... 50
   4.6 Confirmation and submission of the offer .................................................................. 52

5. Checking submitted data and documents ..................................................................... 54

6. Cancel and resubmit the offer (when submitted) ........................................................... 56

7. Tenders with multiple lots............................................................................................ 58
   7.1 Offers list .................................................................................................................. 59
   7.2 Submission of the offer: choosing the lots ............................................................... 60
   7.3 Envelopes in tenders with lots ................................................................................. 62
   7.4 Summary of separate offers (for each lot) ............................................................... 64
   7.5 Submitting the offer in different forms in a tender divided in lots ............................ 64

8. Communications between the Contracting Authority and Economic Operators .......... 68

9. Tender completion.......................................................................................................... 73

10. Tender results............................................................................................................... 76

11. Information Security.................................................................................................... 78

12. Technical support........................................................................................................ 79
**Information**

**Version**

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Text Edited</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>20/04/2016</td>
<td>First version of the document</td>
</tr>
<tr>
<td>2.0</td>
<td>13/10/2017</td>
<td>Example tabs updated and typing errors are corrected. Mandatory field “Labour costs” (in submission economic envelope) is added. Tag “Contracts summary” modified: in a contract detail the tag “Invited operators list” changes in “Operators list”. “Rectification tender deadlines” tab is added in the procedure details (if there are any rectifications). In the personal area, the possibility to reply a communication is added.</td>
</tr>
<tr>
<td>2.1</td>
<td>18/12/2017</td>
<td>To upload a document just click on “Browse...” and the it will be uploaded automatically.</td>
</tr>
<tr>
<td>3.0</td>
<td>16/05/2019</td>
<td>The paragraph &quot;4.3.1 Compiling the technical envelope by entering values and uploading documents” for is extended for what it concerns most economically advantageous tenders compiled by entering values and uploading documents. The paragraph “9. Tender completion” is extended. Example images are updated (the “Save” button is deleted).</td>
</tr>
<tr>
<td>3.1</td>
<td>31/03/2020</td>
<td>Spelling corrections and notes are added.</td>
</tr>
<tr>
<td>4.0</td>
<td>01/07/2020</td>
<td>Paragraph “1.1 Browsing the platform” is added</td>
</tr>
<tr>
<td>5.0</td>
<td>01/03/2021</td>
<td>Paragraph ”7.1 Offers list” is added. Paragraph “7.5 Submit the offer in different forms in a tender divided in lots” is added</td>
</tr>
</tbody>
</table>

**Purpose**

This document aims to describe how to use the platform “Appalti&Contratti e-Procurement” for the submission of telematic offers in response to public and reserved tender procedures.

**References**

1. Technical procedures for using the electronic platform and access the reserved area

**Definitions – acronyms – glossary**

<table>
<thead>
<tr>
<th>Terms – acronyms</th>
<th>Meaning</th>
</tr>
</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>
</tr>
<tr>
<td>Errore. 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 &quot;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 How to access the digital platform

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.

Appalti&Contratti e-Procurement is the name of the telematic platform used to complete the electronic tender procedures. In particular, in this document we refer to the part dedicated to economic operators, the Procurement Portal.

Below you can see the portal home page:

In the following instructions please consider synonyms: procurement portal, digital platform, electronic platform.
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 Tender procedures

Tender procedures can be public or reserved:

- Public procedures are visible to everyone. Anyone can access the tender documentation and any interested economic operator possessing specific requirements for participation can submit an offer, prior registration.

- Reserved procedures and their tendering notices are visible only to a restricted number of operators invited to submit an offer.

2.1 Participate in a public tender procedure

The section "Acts of contracting authorities and contracting entities separately for each procedure" shows all public tender notices that can be freely consulted.

From the list of tenders, you can access the tender with the function "View detail" (see arrow 2). The most significant elements are highlighted, including the "Tender documentation".
After consulting the “Tender Documentation”, if you intend to participate, you must access the reserved area of the portal (see instructions in document 1 “Procurement platform technical procedures and access the reserved area”) to find the functions to submit the offer (described in paragraph 4).


2.2 **Reserved procedure**

In case of reserved procedures, the Contracting Authority communicates to the economic operator - in a reserved form - the request for an offer (RDO) and the invitation. The Contracting Authority sends the invitation both on the platform and by email/PEC (Certified email). However, the economic operator must use the Procurement Portal for all the communications relating to the procedure (requests for clarifications, sending documents, offer submission, etc.). Please refer to the tender regulation for further details on communicating with the Contracting Authority.

If you receive an invitation, you must access the portal reserved area (see instructions in document "Technical procedures for using the electronic platform and access the reserved area") to find the features useful to submit the offer (described in paragraph 4).

Note that after logging in to the reserved area, in the "Personal Area" section, you can find the invitation letter received via email/PEC (Certified email) in the section "Communications" among the "Received communications", as shown in the following example.

Click on “received communications” to list them, as shown below:
Click on the title of the communication to open it: details and attachments will appear, as shown below:

![Detail of communication received](image)

The "Open procedure" button opens the detailed page of the procedure. This page is accessible as well from the "Personal Area" via "Offer requests".
To proceed with the submission of the offer, please refer to paragraph 4.

3 Requests for clarifications

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.

1. **Access the reserved area;**

2. **Identify the procedure of interest:**
   - if you look for a public call for tender, scroll the page "Tenders and procedures in progress" until...
you find the one of your interests, then click on "View details", as described in the previous paragraph 2.1.

- if you look for a reserved procedure, from your "Personal Area" click on "Offer requests", scroll the page until you find the procedure of your interest, then "View details" to get to the "Procedure details" tab described at the end of the previous paragraph 2.2.

3. Scroll down the procedure detail page; at the bottom you’ll find the section "Confidential Communication to the competitor" as shown below; then click on "New communication".

4. **Fill in the data** by entering the subject of the request, then the body of the message (or refer to a possible attachment - see next step).
5. Proceed with "Next"; the "Attachments" tab allows you to attach one or more files to the message, providing a description for each. To insert an attachment, refer to the instructions in the following image:

![New communication](image)

1. Enter a description, i.e., a descriptive title of the document you are about to attach (required).
2. Press Browse... and select the file to attach from your PC (preferably use PDF format files). The document is uploaded automatically by the system.

6. 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.

![New communication](image)
7. 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).

3.1 Reply to requests for clarifications

The replies to requests for clarifications are published on the Procurement Portal and are visible in the detail page of the procedure in a section located under the tender documentation. In particular, they are included in the "Communications from the Contracting Authority" section (see example in the following image) and are publicly visible in the case of public procedures, or visible only to the economic operators invited to submit an offer in the case of reserved procedures. Communications concerning answers to clarifications are published within the deadlines set by the tender regulations or by the invitation letter and in any case within the deadlines set by Italian Legislative Decree 50/2016.
4 Submit the offer

To submit the offer in response to a call for tender or a letter of invitation, you must:

1. **Access the reserved area;**

2. **Identify the procedure of interest:**
   - if you look for a public call for tender, scroll the page "Tenders and procedures in progress" until you find the one of your interests, then click on "View details", as described in the previous paragraph 2.1.
   - if you look for a reserved procedure, from your "Personal Area" click on "Offer requests", scroll the page until you find the procedure of your interest, then "View details" to get to the "Procedure details" tab described at the end of the previous paragraph 2.2.

Scroll down the procedure detail page; at the bottom of the page there is a function called "Submit tender offer": click on it to proceed with the next steps.
4.1 Compilation of the offer

After clicking on “Submit tender offer” shown above, you will access the "Sending offer telematic envelopes" page (menu below), which shows all the steps that you need to do to submit the offer: initially all the steps are disabled, except the first: “Start compiling offer”.

1. Proceed by clicking on “Start compiling offer”: you’ll see the summary of your personal data in order to verify if they are updated correctly; by clicking on “Edit” it is possible to view and/or update all the personal data. (For further details on updating personal data, please refer to the specific document: 1”Technical procedures for using the telematic platform and access the reserved area”)

Further steps will be available after completing the first one.
2. By clicking on "Next" you will have to specify the “form of participation” in the procedure, that can be as a "single economic operator" or as a "temporary grouping of economic operators (RTI)"; in case you have to participate in the form of a temporary group, see the instructions in paragraph 4.1.1 below.
Consider at the moment the case of participation as a single economic operator, thus leaving the answer “No” to that question, as illustrated below.

3. By clicking on "Next" you will get to the “Summary” step, where you can confirm the personal data and the form of participation.
4. Click on "Confirm" to complete the operations and return to the starting page entitled "Sending offer telematic envelopes".

Proceed then with the preparation of the administrative envelope as described in paragraph 4.2.
4.1.1 Submit the offer as a temporary grouping of operators

If you intend to submit the offer as a temporary grouping of economic operators (RTI), it is necessary that only the "group leader" or "agent" of the group operates on the platform. He will have to do the same steps described in the previous paragraph 4.1 up to point 2, reaching the "Form of participation" page (see below). Here he has to indicate "Yes" to the question "The company participates as an agent for the temporary grouping?". The "agent" must specify a conventional name attributed to the grouping in the field "Name of temporary grouping" (which will be used by the Contracting Authority to quickly identify the grouping during the tender phase, without affect the composition and the representation duties of the agent company).

By clicking on "Next", the "Composition of the grouping" page will open. Here he must indicate the personal data and participation fees of each member of the grouping.
To enter the personal data of the principal economic operators it is necessary to fill in the section entitled "New" and click on the "Add" button as shown in the figure below.

For each master data added, the list of main companies will be populated as shown below.
Once the grouping principals have been listed, proceed with "Next" and complete the insertion by clicking on "Confirm". Proceed then with the preparation of the administrative envelope as described in the paragraph 4.2.

4.1.1 Change form of participation

If you decide to change the form of participation from a single operator to a grouping of economic operators or vice versa, just go back to the “Start compiling offer” step and repeat the operations.

**ATTENTION:** in this case all the data and documents previously uploaded will be destroyed by the system and it will not be possible to recover them (also because they will have to be revised due to the new single or aggregate form of participation that has been chosen)!

**Before doing this, make sure you have a copy of the files on your PC!**
4.2  Prepare the administrative envelope

After completing the preliminary operations described above in the "Start compiling offer" step, you can proceed with filling in the "Administrative envelope" by clicking on it.

The administrative envelope can include a predefined list of documents required. In this case, please refer to paragraph 4.2.1 that explains the specific modalities for uploading files for each item.

If there are not items listed, you will find a page similar to the one illustrated below. Here you can attach all the documentation required in the tender/tender invitation letter.
1. Prepare the document required starting from the fac-simile provided by the Contracting Authority and present in the section “Tender documentation” if available (see paragraph 2.1) or in the invitation letter (see paragraph 2.2). If required by the system, by the tender notice/regulation or by the invitation letter, create the file in PDF format (or in the format required) and digitally sign it.

2. Fill in the “Description” field with the title of the file you are going to upload, then click on “Browse...” to choose the file to upload.
3. The document will upload automatically. Wait for the uploading to complete.

**ATTENTION**: do not exceed the maximum size indicated for every single file and for the total files to upload highlighted in this page!

4. Once the upload is complete, you will see the name of the attached file, the size and an icon to delete the file in case of error, then you can repeat the upload.
   It is also possible to download the file by clicking on its name (for example to make sure you have uploaded the correct file, to check that it is not corrupted, etc.).

5. Proceed in the same way with the other attachments.

### 4.2.1 Uploading files following a plain list of documents

The Contracting Authority can set a list of documents that you must upload in the administrative envelope.

**ATTENTION: the precompiled list of the required documentation can be partial!**

For example, it may contain only documents valid for all operators regardless of which their form of participation is, or certain documents for which the Contracting Authority wishes to make a specific facsimile available or check the format of the uploaded file, etc.

You must always refer to the indications of the tender notice/regulation or the invitation letter and attach all the required documentation!

If the Contracting Authority has predefined the list of required documents, you will see a page similar to the one shown below.
The following image highlights the particularities of the list of predefined documents required by the Contracting Authority.

The asterisk (*) means that the document is mandatory and must be attached.

The presence of the icon provides information on the file format (P7M, PDF, etc.). If the icon is not displayed, the system accepts different formats among those provided. Always refer to the tender regulation or to the invitation letter regarding the format of the files to be attached.

The icon indicates that a facsimile prepared by the Contracting Authority is available. It is always advisable to use the facsimiles of the Contracting Authority.

To upload a required default document into the administrative envelope, refer to the instructions below.
1. If available, download the facsimile prepared by the Contracting Authority (see image)

<table>
<thead>
<tr>
<th>Description</th>
<th>Fac-simile</th>
<th>Attachment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative</td>
<td>![Download Icon]</td>
<td>![Browse... Icon] No file selected</td>
</tr>
</tbody>
</table>

2. Fill in the facsimile or prepare the document with your word processor tools. If required by the system, by the tender notice/regulation or by the invitation letter, produce the file in PDF format (or in the required format) and digitally sign it. Then click on "Browse ..." to select the file to upload.

<table>
<thead>
<tr>
<th>Description</th>
<th>Fac-simile</th>
<th>Attachment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative doc</td>
<td>![Download Icon]</td>
<td>![Browse... Icon] No file selected</td>
</tr>
</tbody>
</table>

3. Once the upload is complete, you will see the name of the attached file, the size and an icon to delete the file in case of error, then you can repeat the upload. It is also possible to download the file by clicking on its name (for example to make sure you have uploaded the correct file, to check that it is not corrupted, etc.).

<table>
<thead>
<tr>
<th>Description</th>
<th>Fac-simile</th>
<th>Attachment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative doc</td>
<td>![Download Icon]</td>
<td>![Administrative.pdf (29 KB) Icon]</td>
</tr>
</tbody>
</table>

4. Proceed in the same way with the other attachments.

For each file uploaded, the system highlights the total space occupied for the envelope, which must not exceed the pre-established and highlighted limits.
5. To upload a document which is not listed but required by the tender regulation or by the invitation letter, scroll the list (with the scroll-bar, if exists) to the bottom of the page, enter the **description** of the document, press "Browse..." to select the file and wait for it to upload.
4.3 Prepare the technical envelope

If provided by the procedure, on the page “Sending offer telematic envelopes” there is the “Technical envelope” section as shown below.

The envelope will be accessible only after having passed the “Start compiling offer” step described in the previous paragraph.

By clicking on “Technical envelope” the telematic platform will display the page “Technical envelope documents” similar to the one shown below. Here you can upload the documents required in the tender/tender invitation letter.

The operations are the same described in the previous paragraphs 4.2 and 4.2.1, in the following paragraph you can find the instructions summarized in a few steps.
4.3.1 Compiling the technical envelope by entering values and uploading documents

If required, you have to enter the technical offer by compiling each evaluation criterion independently.

You can fill in the blanks by entering the values manually or by selecting them from a drop-down menu, if available.
Once you have entered all the requested values, you will be able to access the next step of the procedure by clicking on "Next". In this page you can proceed to the automatic generation of the "Technical Offer" in PDF format.

By clicking on "GENERATE PDF TECHNICAL OFFER" you will be asked to download the offer in PDF format, with a summary of the values entered.
Then, you have to click on "Next" again to be able to insert and attach the technical offer document using the "Browse..." button:
After uploading the digitally signed PDF file, you can return to the main menu to continue with the next step: the Economic Offer.

**ATTENTION**: if you want to change the technical values already entered, you will need to repeat the entire process: enter the values in the first page, generate a new PDF of the technical offer (which is required to be digitally signed) and upload the new file.
4.3.1 Compiling the technical envelope only by uploading documents

Prepare the required documents using any fac-similes available in the "Tender Documentation" or in the list of required documents on the "Documents of the Technical Envelope" shown above. Where required, save the documents in PDF format (or in the required format) and digitally sign them.

Upload the documents that correspond to the listed items (in the example shown below there is only the item "Technical offer") with the function "Browse ..." and wait for the document to upload.
Attach any other documents required by adding additional items writing their "Description", then "Browse..." to upload documents. Always pay attention to the size limits of the single files and of the sum of all files attached to the Technical Envelope (highlighted at the bottom of the page).
4.4 Prepare the economic envelope

The "Economic envelope" will be available only after the step "Start compiling offer" described in the paragraph 4.1 is completed.

To access the economic envelope, simply click on the item highlighted in the following figure.

The telematic platform allows you to compile the economic offer also in two different ways:

1. **Enter values and upload documents**: you have to enter the discount, the amount or the unit prices on the platform; then you have to download the offer PDF file after its automatic generation. Finally, you have to sign and upload it adding any additional documents;

2. **Upload of documents only**: the platform will provide the list of the required documents to be attached in the Economic Envelope;

Since the choice of method is exclusively up to the Contracting Authority, you will be automatically guided by the telematic platform to compile the offer according to the preferences expressed by the Contracting Authority: both methods are described below.
4.4.1 Compiling the offer entering values and uploading documents

The compilation of the offer in interactive mode, in accordance with the provisions of the tender procedure, allows the economic operator to enter:

1. the **percentage of discount** offered on the tender base amount or on the tender base price list;
2. the **amount** offered;
3. the **unit prices** and any detail information on the offer;

Once the values have been entered, the telematic platform will generate the “Economic Offer” document automatically. It is a standardized PDF file containing the values listed above.

You must download the PDF file of the Economic Offer, digitally sign it and upload it, adding, if necessary, any additional documents required.

The steps summarized so far are described in detail in the following paragraphs.

4.4.1.1 Offer expressed through a discount offered on the tender base amount or on a tender base price list

If the offer has to be expressed through a discount offered on the tender base amount, it will be displayed a page similar to the one shown below. Here you can enter:

- the **percentage discount** offered;
- the **company safety costs** (in €, not as a percentage) concerning the fulfilment of the provisions on health and safety in the workplace;
- the **labour costs** (in €, not as a percentage)
Proceed with "Next", select the **signatory** of the offer and click on "Generate PDF offer". In case of grouping, see paragraph 4.4.1.1.

**The generation of the PDF is mandatory** and you cannot proceed without first downloading it using the dedicated button (as suggested by the alert below).

The offer generated in PDF format will be similar to the one shown below:
Check that all the data in the PDF file is correct, in case of errors or need for modification:

- for the "Competitor's personal data" it is necessary to return to the "Start compiling offer" step referred to in paragraph 4.1.
- for the data relating to the "Offer", simply click on "Back" and repeat the operations described above.

Digitally sign the document. The signature must be of the same indicated as the signatory selected on the "Download offer" page illustrated above and reported in the PDF file under "Offer signed by".

Proceed with "Next" and upload the digitally signed PDF file to the "Documents" page; attach any additional files required in the tender/tender regulations or in the invitation letter.
4.4.1.1 Signatories and PDF offer generation in case of grouping

In case of participation in the form of a grouping of economic operators (see previous paragraph 4.1.1) the "Download offer" page will present the list of members of the grouping as in the example shown below.

The economic operator who is submitting the offer (which must be the agent/group leader) must indicate the respective signatory for each member of the grouping.

Click on the edit icon in the "Actions" column corresponding to the name of the agent/group leader (see image below).
You will be asked to select the name of the signatory among those present in the registry.
Conclude by clicking on "Update".

To verify or change the names of the signatories listed here, it is necessary to return to the step "Start compiling offer" seen in paragraph Error.
Then proceed for each of the members of the grouping by filling in the registry of the signatory.

Click on the edit icon in the “Actions” column corresponding to the name of the principal operator of the group (see following image). You will be asked to fill in the personal data sheet and to indicate the assignment.

Conclude by clicking on "Update".

Once the data has been entered, click on "Save" and then "Generate PDF offer" button will be displayed. Click on it to download the PDF file, that must be signed by all the signatories previously entered.
Finally, continue, as in the case of a single operator, with “Next” and upload the digitally signed PDF file to the “Documents” page; attach any additional files required in the tender/tender regulations or in the invitation letter. When the upload is completed, you can go “Back to the menu”.
4.4.1.2 Offer expressed as a total amount

If the procedure requires an offer in form of a total amount, a page similar to the one illustrated below will be displayed. Here you can enter:

- the **total amount** offered;
- **company safety costs** (in €, not as a percentage) concerning the fulfilment of the provisions on health and safety in the workplace;
- **labour costs** (in €, not as a percentage)

Proceed, then, with "Next", select the signatory of the offer and click on "Generate PDF offer".

In case of a temporary grouping, see paragraph 4.4.1.1.
To verify or change the names of the signatories listed here, it is necessary to return to the "Start compiling offer" step referred to in the previous paragraph Errore.
You will be asked to generate and to download the offer in PDF format. It will be similar to the following:

Check that all the data in the PDF file is correct, in case of errors or need for modification:
- for the "Competitor's personal data" it will be necessary to return to the "Start compiling offer", see paragraph 4.1.
- for the data relating to the "Offer", simply click on "Back" and repeat the operations described above.

Digitally sign the document. The signature must be the name indicated as the signatory selected on the "Download offer" page illustrated above, and then reported in the PDF file under the heading "Offer signed by".

Proceed with "Next" and upload the digitally signed PDF file to the "Documents" page; attach any additional files required in the tender/tender regulations or in the invitation letter.
4.4.1.3 Offer expressed through unit prices

If the procedure requires an offer expressed through unit prices, a similar page to the one illustrated below will be displayed. Here you can see the items related to the offer:

![Economic offer]

To enter the offer, you must click on "Edit": it will be displayed a form for entering unit prices as shown below. The fields show in real time the amount of each item, obtained from the product of the unit price offered for the expected quantity. It will be displayed also the total amount of the offer, obtained from the sum of the products of each line.

Once the unit prices have been entered, conclude by clicking on "Save".

Pay attention to the vertical and horizontal scroll-bar that appear if the monitor space is not sufficient for the presentation of the entire information grid.
ATTENTION: the Contracting Authority can add any attributes to the unit prices required. You must compile them following the information provided in the tender documentation or in the invitation letter (see image below). Always pay attention to the vertical and horizontal scroll-bar that appear if the monitor space is not sufficient for the presentation of the entire information grid.

Once the unit prices (and any additional information) have been entered, you can proceed by clicking on "Next" and go to the "Offer" page, where the amount offered will be automatically displayed (obtained from the sum of the products of the different items).

Then the value of the company safety costs must be entered (in €, not as a percentage) relating to the fulfilment of the provisions on health and safety in the workplace.

The value of the labour costs also must be entered (in €, not as a percentage).
Proceed then with "Next", select the signatory of the offer and click on "Generate PDF offer".

In case of temporary grouping, see paragraph 4.4.1.1.

You will be asked to generate and download the offer in PDF format, as shown in the image below.
Check that all the data in the PDF file is correct, in case of errors or need for modification:
- for the "Competitor's personal data" it will be necessary to return to the "Start compiling offer", see paragraph 4.1.
- for the data relating to the "Offer", simply click on "Back" and repeat the operations described above.

Digitally sign the document. The signature must be of the same indicated as the signatory selected on the "Download offer" page illustrated above, and then reported in the PDF file under "Offer signed by".

Proceed with "Next" and upload the digitally signed PDF file to the "Documents" page; attach any additional files required in the tender/tender regulations or in the invitation letter.
4.4.1 Compilation of the offer by uploading documents

The compilation of the offer by uploading documents requires the economic operator to prepare the offer file on the basis of the indications or any fac-simile present in the tender documentation, and then to upload it with any other attached documents.

On the page "Sending offer telematic envelopes" shown below, click on "Economic envelope".

You will see the page where you can upload the offer. If a fac-simile is available, download it and use the fac-simile to fill in the offer file. Then attach the file clicking on "Browse..." and wait for it to upload.
Economic envelope documents

Attach the documentation required for the economic envelope. To upload files related to any documents already on the list, click on “Browse...” To add documents to the list, you must first specify the “description” and then upload the related file by clicking on “Browse...”

ATTENTION: the competitor MUST ALWAYS refer to the instructions of the call for tenders or the invitation letter and attach ALL the documentation required!

The documents marked with “*” are mandatory to send the request.

<table>
<thead>
<tr>
<th>Description</th>
<th>No-similar</th>
<th>Attachment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tender offer</td>
<td></td>
<td>Browse... No file selected</td>
</tr>
</tbody>
</table>

Enter a description to attach a document: Browse... No file selected

You can upload an attachment with a maximum size of 30720 KB.
You have uploaded documents for 0 KB, and you can upload documents up to 102400 KB.

< BACK TO THE MENU
4.5 **Summary of the offer and corrections**
From the "Sending offer telematic envelopes" page, after completing the administrative envelope, any technical envelope and the economic envelope, before sending the offer to the Contracting Authority, it is possible to access the "Summary" page to make a quick check of all attached documentation.
# Offer summary

Summary of entered data and uploaded attachments. Attention: the data are saved but not sent to the Administration yet.

## Economic operator details
- **Subject**: Renovation works for Springfield school
- **Economic operator**: Test Ltd.
- **Legal representatives**: Black John from 05/06/2018
- **Technical directors**: Red Toby from 12/05/2020
- **Participates as an agent of a RTI**: YES, on behalf of Test Group

## Administrative envelope
- **Documents attached (1)**: • Administrative doc (Administrative.pdf)
- **Missing mandatory documents**: ✅

## Technical envelope
- **Documents attached (1)**: • Offerta tecnica (OffertaTecnica.pdf)
- **Missing mandatory documents**: ✅

## Economic envelope
- **Documents attached (1)**: • Offerta economica (OffertaEconomica.pdf)
- **Missing mandatory documents**: ✅

---

*List of files attached to the envelope*
4.6 Confirmation and submission of the offer

Once all the documentation has been uploaded into the different envelopes, it’s possible to confirm everything and send the offer to the Contracting Authority by clicking on “Confirm and send offer”.

You will be asked to confirm the submission:

By confirming, the "electronic envelope" containing data and documents of the administrative, technical and economic envelopes will be sent to the Contracting Authority. The operation may take a few minutes to process, depending on the size of the files contained in the different envelopes.

The process ends with the notification of the outcome of the "Offer submission" operation, with evidence of the date and time recorded at the time of confirmation (and if applicable, also with the protocol number assigned to the "electronic envelope" from the Contracting Authority). The notification of transmission is sent also to the economic operator via email/PEC (Certified email).
ATTENTION: the telematic platform does not allow the economic operator to send the offer beyond the deadline.
5 Checking submitted data and documents

After submitting the offer to the Contracting Authority (see paragraph 4.6), if necessary, you can access the procedure details to check the list of transmitted files.

Proceed by following the instructions below:

1. **Access the reserved area;**

2. **Identify the tender of interest:**
   - if the deadline for submitting offers has passed, in your "Personal Area", click on "Tender procedures at the awarding stage or concluded", scroll the page until you find the procedure of your interest, then "View details" to see the "Procedure details" tab.
   
   Otherwise, if the terms are still in progress:
   - if it is a public call for tender, scroll the page "Tenders and procedures in progress" until you find the one of your interests, then click on "View details", as described in the previous paragraph 2.1.
   - if it is a reserved procedure, from your "Personal Area" click on "Offer requests", scroll the page until you find the procedure of your interest, then "View details" to get to the "Procedure details" tab described at the end of the previous paragraph 2.2.

3. When the procedure details are displayed, scroll down: at the bottom of the page there is the "Offer summary" button as shown below. Click on it to proceed.

---

**Invitation documentation**

- Tender invitation

**Documentation required to competitors**

- Administrative envelope
  - Administrative doc

- Technical envelope
  - Offerta tecnica

- Economic envelope
  - Offerta economica

**Communications from the contracting authority**

- No communication from the contracting authority

**Confidential communications to the competitor**

- 1 communications received (1 unread)
- 0 communications archived
- 0 communications for remedying deficiencies
- 0 communications sent
- New communication

[OFFER SUMMARY]
You’ll see the summary of your offer, which is the list of the attached documentation for each envelope. Here you can see:

- Description or title of the document
- Attached file name

**N.B:** in the summary of the offer, you can view the uploaded files, but not download or open any of them. You can download only the attachment summary.
6 Cancel and resubmit the offer (when submitted)

If the offer has been sent to the Contracting Authority (see previous paragraph 4.6 Errore. L'origine riferimento non è stata trovata.), but the deadline for submitting the offer have not passed yet, the platform allows you to cancel and resubmit the entire offer.

It should be noted that by proceeding with this operation, the previous offer sent will be deleted from the system, so it will not be possible to retrieve any data. Therefore, if you don't submit another one within the deadline, you will not be able to participate in the assignment procedure.

To cancel the offer already sent:

1. Access the reserved area;

2. Identify the tender of interest:
   - if it is a public call for tender, scroll the page "Tenders and procedures in progress" until you find the one of your interests, then click on "View details", as described in the previous paragraph 2.1
   - if it is a reserved procedure, from your "Personal Area" click on "Offer requests", scroll the page until you find the procedure of your interest, then "View details" to get to the "Procedure details" tab described at the end of the previous paragraph 2.2

3. When the procedure details are displayed, scroll down: at the bottom of the page there is the "Offer summary" button as shown below. Click on it to proceed.
4. At the bottom of the "Offer Summary" page there is the "Cancel and resubmit offer" button as shown below. Click on "Cancel and resubmit offer" to delete the offer sent.

5. The system will ask for confirmation: by clicking on "YES" the previously submitted offer will be deleted and it will be necessary to repeat the operations described in paragraph 4 within the deadline set by the tender/tender regulations or the invitation letter.
7 Tenders with multiple lots

Nel caso di procedure di affidamento suddivise in lotti è possibile prendere visione dei lotti oltre che dalla documentazione anche dalla scheda di dettaglio della procedura:

1. Access the reserved area;

2. Identify the tender of interest:
   - if it is a public call for tender, scroll the page "Tenders and procedures in progress" until you find the one of your interests, then click on "View details", as described in the previous paragraph 2.1.
   - if it is a reserved procedure, from your "Personal Area" click on "Offer requests", scroll the page until you find the procedure of your interest, then "View details" to get to the "Procedure details" tab described at the end of the previous paragraph 2.2.

3. When the procedure details are displayed, scroll down: at the bottom of the page there is the "Submit Tender Offer" button as shown below. Click on it to proceed.

In case of procedures divided into lots, in the tender regulation or in the invitation letter you’ll find:
- the requirements for participation in each lot
- if it is possible to participate in only one, only a few or all lots

You can choose which lots to participate in and then upload all the documentation required for each lot. You can also decide whether to submit an offer to one or more lots in a single form and/or in associated form as an agent of a temporary grouping of companies (RTI).

In the paragraph below you can find the particularities of the presentation of the offer in a procedure divided in lots, differently from what explained in the paragraph 4.
7.1 Offers list

When you access the platform, you can compile the offer as a "single company" or as group leader/agent of a temporary grouping of companies (RTI).

In tenders divided into lots it is also possible to participate in different forms in different lots. It is possible to submit only one offer, as a single or on behalf of the RTI, for one or more lots. For example, it is possible to submit an offer as a single company to a lot or more and as an RTI to another lot or more. It is also possible to participate as another RTI in another lot or more.

After clicking on "Submit tender offer" shown in the previous screen, you will see the "Offers list" page shown in the image below, containing the list of the envelopes being compiled or already sent.

**ATTENTION:** For reserved procedures, the system sets the offer entry by default "as a single": if you want to continue with this form click on the edit symbol (pencil). Otherwise, to submit an offer in associated form as an agent of a RTI, click on "Add offer in RTI".

In case of an open procedure the system will ask you to choose to add the offer "as a single" or "in RTI", as shown below.
7.2 Submission of the offer: choosing the lots

In the phase of "Start compiling offer" (already described in paragraph 4.1), there is a step in which it is possible to choose which lots you intend to participate in. The following figure highlights this step.

**ATTENTION**: In contrast to what is described in paragraph 4.1, in case of a tender divided into lots, if the offer is presented as single, you cannot choose the "Form of participation", as this choice has already been made previously by clicking on "Add offer as single". Only by clicking on "Add offer in RTI" it will be possible to define in detail the name and the composition of the group.

Once you have chosen the lots you want to participate in, in the technical envelope (when applicable for each lot) and in the economic envelope it will be possible to enter data and upload documents only for the selected lots (as illustrated in the following paragraph 7.3).
ATTENTION: after choosing the lots, if you have uploaded documents in the administrative, technical or economic envelopes, if you want to change the lots to participate in, you will need to repeat the step "Start compiling offer". In this case, all the data and documents uploaded in the different envelopes will be eliminated and you will have to re-entered everything for the new lots chosen.
7.3 Envelopes in tenders with lots

In case of tenders with lots, after choosing the lots you want to participate in, you can proceed with the preparation of administrative, technical (when at least one lot requires it) and economic envelopes.

The administrative envelope is unique for the entire tender, so all the required documentation must be attached together, exactly as in the case of the single lot described in paragraph 4.2.

With regard to the technical envelope and the economic envelope, on the other hand, the platform will present the list of the selected lots. The economic operator will have to complete the operations explained in paragraph 4.3 for each lot among those chosen which includes the technical envelope, and the operations explained in paragraph 4.4 for each lot chosen.

Below you can find, for example, the compilation of the economic offer of a tender divided into lots. The steps that are different from the compilation of a single lot tender are highlighted with yellow arrows.

By accessing the "Economic envelope" (see paragraph 4.4) the platform will present the list of the selected lots as described in paragraph 7.1.

In the "Ready to send" column a check mark will be displayed after you have filled in the offer of each lot, in order to easily keep in evidence which lot has been completed or not.

---

By clicking on the title of the lot, you will continue filling in the offer for that lot (see following image), in the same way as described in the previous paragraph 4.4.1.
Once the offer has been entered, you will return to the list of lots and the check mark will appear in the "Ready to send" column.
7.4 Summary of separate offers (for each lot)
The summary page (see previous paragraph 4.5) will display all the attached documents grouped by lot.

<table>
<thead>
<tr>
<th>Economic operator details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Subject:</strong></td>
</tr>
<tr>
<td><strong>Economic operator details:</strong></td>
</tr>
<tr>
<td><strong>Legal representatives:</strong></td>
</tr>
<tr>
<td><strong>Technical directors:</strong></td>
</tr>
<tr>
<td><strong>Participates as an agent of a RTI:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Administrative envelope</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Documents attached (1):</strong></td>
</tr>
<tr>
<td><strong>Missing mandatory documents:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lot 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Subject:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Economic envelope</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Documents attached (1):</strong></td>
</tr>
<tr>
<td><strong>Missing mandatory documents:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lot 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Subject:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Economic envelope</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Documents attached (1):</strong></td>
</tr>
<tr>
<td><strong>Missing mandatory documents:</strong></td>
</tr>
</tbody>
</table>

7.5 Submitting the offer in different forms in a tender divided in lots
As indicated in the last part of paragraph 7.1, by starting from "Submit tender offer" in the "Offers list" page it is possible to indicate if you want to submit an offer in different forms for one or more tender lots, as a single or as an agent of a temporary grouping (RTI).

Depending on whether an offer has already been submitted in single form or in associated form, the offers already sent or in compilation will be displayed in the "Offers list" page, as in the example shown below:
To submit an offer with a different method of participation, click on "Add offer as a single" (present only if the offer has already been submitted in an associated form) or on the "Add offer in RTI" (present if the offer has already been submitted as a single, or if you want to submit an offer again in an associated form, but with a different temporary grouping - RTI).

Offers in status “In editing” can be cancelled by clicking on in the "Actions" column.

Offers in status "Sent" can be cancelled before the deadline for submitting the offer has expired by.
clicking on the description of the economic operator who sent the offer. You will be redirected to the
details of the offer submitted, and at the bottom of the page you can click on "Cancel and resubmit
offer", as shown in the image below.

**ATTENTION:** it will not be possible to submit an offer for the same tender lots both individually
and in associated form; for example, if you try to submit an offer as a single for a tender lot
for which an offer has already been submitted as an agent of a temporary grouping, a
notification will appear.
Submit tender offer

The economic operator who has access to the platform can fill in the offer form either as a "single economic operator" or as a group leader/agent on behalf of a temporary grouping of companies "RTI". In lots tenders it is possible to compete in different forms in different lots. It is possible to submit a single request, as a single or on behalf of the same RTI, for one or more lots. For example, it is possible to participate as a single company in a lot (or more) and as a RTI in another lot (or more). It is also possible to participate as another RTI in another lot (or more). A "digital envelope" linked to the competitor (single or RTI) for one or more lots is then created. ATTENTION: in case of reserved procedures, the digital envelopes for each invitation request received will be always displayed.

Warning:

Lot 1 was selected for more than one offer (1#2,1#3).

<table>
<thead>
<tr>
<th>#</th>
<th>Competitor</th>
<th>Participation form</th>
<th>Lots</th>
<th>Offer status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Test Group</td>
<td>Principals:</td>
<td>Lot 2</td>
<td>Sent</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Working Company Ltd.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Test Ltd.</td>
<td>Single</td>
<td>Lot 1</td>
<td>Sent</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Test Group2</td>
<td>Principals:</td>
<td>Lot 1</td>
<td>In editing</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>YMCA</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ADD OFFER IN RTI

Back to the procedure
8 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 a tender, such as:

- communication of the public opening of the offers
- request for clarifications or for documents for remedying deficiencies
- communication of the exclusion of competitors
- communication of the draw of the competitors and of the request for documents to prove requirements
- communication of the final award and release of the provisional deposit to the companies not awarded
- communication of the date of conclusion of the contract
- 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.

When replying, the communication subject is predefined. You can enter the body of the message in the "Message" field (see image below).
In the "Attachments" page you can upload one or more attachments: always pay attention to the file size limits highlighted at the bottom of the text.
Finally, you can preview the message with the list of its attachments and then complete the operation by clicking on "Send communication".

The communication is sent with tracking of the date and time of sending (and if applicable, also with the reference to the protocol number assigned to the communication by the Contracting Authority). The notification of transmission is also sent to the economic operator via email/PEC.
Send new communication

Request made successfully.

Your request was sent on 16/05/2022 12:13:51.

BACK TO PREVIOUS STEP
9 Tender completion

It is possible to follow the activities of completion of the tenders directly from the platform, step by step. In the case of electronic tenders, in the procedure’s details (see paragraph 2) you can find the section "Tender completion" and the relative link "View the phases of the call for tenders", as illustrated below.

By clicking on "View the tender phases" it is possible to access the completion phases of the tender, from the opening of the administrative envelopes to the ranking.
For each phase, you can find the list of competitors, the opening status of the envelope, the admission/exclusion of the competitor in that phase and other specifics (for example the score, the amount offered, etc.).

It is also possible to view the list of the attached files and what’s in the envelope (it is not possible to download the files, you can only verify if the files uploaded are consistent with those required).
The last phase shows the final ranking.
10 Tender results

The progress and the result of the tender are notified to the economic operator through the communications seen in paragraph 8.

The result of the procedure is also published in the public area of the procurement portal as required by Italian Legislative Decree 50/2016.
Tender result detail

Contracting authority

Name: Comune di Springfield
Tender manager (RUP): Bonaparte Napoleone

General data

Title: Renovation works for Springfield school
Contract type: Lavori
Tender results date of publication: 16/05/2022
Tender status: Conclusa - Aggiudicata
Procedure reference: G00649

Lots

Acts and documents (art.29 c.1 Legislative Decree 50/2016)

Tender result documentation

Awarding document

Back to the list
11 Information Security

In order to guarantee high standards of information security, the telematic system is equipped with a series of measures concerning the infrastructural and application system.

Some significant elements are listed below.

To ensure the secrecy of offers, the data (discounts and amounts) and digital documents uploaded through the "Procurement Portal" are encrypted (using an asymmetric key system with session key) and stored only in the database of the system.

The encryption operations are carried out in a "transparent" way directly from the software without requiring special hardware/software devices.

The software does not allow the decryption of data and documents before the deadline for the submission of offers or the opening of envelopes, adopting the official date and time of the national service as the system date and time, using the NTP protocol.

When the offer is sent, the system records the official date and time (hh:mm:ss), displays and automatically sends the economic operator a PEC (Certified email) notification containing the references of the tender, the date and time of sending of the offer (in case of integration with the Administration protocol system, also the protocol officer number is indicated).

The competitor, after having sent the offer, has always the possibility to view its "Summary" with the list of attached documents. For each of these, it is indicated the hash code that can be compared with that of his own files, in order to ensure the correct and complete upload of the documents.

All critical operations (in particular login/logout, presentation of envelopes, release of decryption keys, opening of envelopes, etc.) are tracked and stored in the system logs.

Control systems are adopted to ensure that the offer in PDF format generated by the system (when required) is uploaded, and that it is consistent with the discount/amount/unit price data entered "on screen".

The elements indicated above concern only the application and intrinsic functionalities of the "Appalti & Contratti e-Procurement" application software, adding infrastructural devices, procedures and related security measures (administration and monitoring of the system, periodic vulnerability tests, anti-virus system adoption, firewall, backup, disaster recovery, clustering/HA, monitoring and storage of log files, ssl/https certificate use, base systems updates, etc.).
12 Technical support

In case of technical problems or malfunctions of the telematic platform, it is possible to obtain technical support by going to the "Helpdesk request" section of the Procurement Portal, or from the "Helpdesk request" personal area.

Methods of provision of the service and other available channels are described in the document "Procurement platform technical procedures and access the reserved area".

For requests for clarification and support on the award procedures, use the functions described in the previous paragraph 3.