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

May 2022
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**Information**

**Version**

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Text edited</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>18/04/2016</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 flag “Registered with the Chamber of Commerce?” added (YES by default).</td>
</tr>
<tr>
<td>3.0</td>
<td>25/05/2018</td>
<td>Adjusting to GDPR: paragraph 9.</td>
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<tr>
<td>4.0</td>
<td>15/03/2019</td>
<td>Possibility to sign in through export and import of M-XML file: paragraph 3.</td>
</tr>
<tr>
<td>5.0</td>
<td>18/03/2020</td>
<td>Example tabs updated and typing errors are corrected. Paragraph 8 (cookies policy) added and paragraph 9 (personal data processing) corrected.</td>
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<tr>
<td>6.0</td>
<td>01/07/2020</td>
<td>Paragraph “2.1 Browsing the platform” added.</td>
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<tr>
<td>7.0</td>
<td>01/03/2021</td>
<td>Paragraph “3.5 How to unblock an expired user” added. Paragraph “3.6 Access the Procurement Portal using SPID” added. Paragraph “3.7 Sing In with SPID” added. Paragraph “3.8 Enable access with SPID” added.</td>
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**Purpose**

This document aims to describe the technical procedures for using the electronic platform, access and use the telematic platform named Appalti&Contratti e-Procurement.

**References**

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<thead>
<tr>
<th>References</th>
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</tr>
</tbody>
</table>

**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>Appalti&amp;Contratti e-procurement</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>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>Electronic tenders, procedures</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 The Telematic Platform: Appalti&Contratti e-Procurement

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

To use the platform, the economic operators must sign in in order to access the reserved area and be able to interact with the Contracting Authority.

Below you can see the home page of the telematic platform, where you can sign in and/or access the reserved area.

You must sign in as a single economic operator. In case of temporary grouping of operators (RTI), it is enough that only the "group leader" or "agent" of the group signs in.

In the following instructions please consider synonyms: procurement portal, digital platform, electronic platform.
2 Software and hardware requirements

In order to operate on the telematic platform (to participate in a tender, register to an operators list, etc.) you should have the necessary tools.

You can access the telematic platform only using a complete pc system (keyboard, mouse, screen, printer, backup disk, etc.) and specifically with the following minimum requirements:

- RAM 2 GB (or what required for the correct running of the operating system)
- Screen resolution 1024x768 or higher
- Internet speed at least 1Mbs in download and 256 kbs in upload
- Digital signature device (smart card reader, token, etc.)

The system must have one or this web browsers:

- Google Chrome
- Mozilla Firefox
- Microsoft Edge (based on Chromium)

The browser must be updated to ensure compatibility, performance and the best level of security (it must support TLS v2 protocol). If the browser version is outdated or not updated (for example Internet Explorer) the proper operation of the telematic platform in not guaranteed.

If the browser is different from those listed above, the compatibility with the telematic platform is not guaranteed.

The system must have the most commonly used tools for document reading and editing (indicative list):

- Microsoft Office
- Open Office or Libre Office
- Adobe Acrobat Reader or other PDF reader

The system must be equipped with an updated antivirus software.

The holders, legal representatives or prosecutors of economic operator who intend to participate in tenders must have a valid digital sign certificate. This certificate must have been released by one of the certification bodies included in the AgID public list (https://www.agid.gov.it) as provided for in the Digital Administration Code. Furthermore, he must have related software to view and sign digital documents.

If declarations and documents submitted in the telematic platform have been digitally signed with certificates released by bodies not included in the AgID public list, they will be considered lacking in signing. With regard to all the procedures carried out in the telematic platform, notices and any communications take place through PEC (Certified email).

Remember that as indicated in the Decree-law no. 185/2008 “Emergency measures to support families, job, occupation and companies and to reshape the national strategic framework with an anti-crisis purpose”, Art. 16, economic operators must equip themselves with a PEC (Certified email) box and declare it to their Chamber of Commerce. This obligation is reaffirmed in the Decree-law no. 179/2012 about the means of communication with the Public Administration. So you must have a commercial PEC (Certified Email)
purchased by an authorized manager.

For more guidance about the communications between the Contracting Authority and Economic Operators please refer to the tender documents, in particular to the tender regulation or the invitation letter as applicable.

2.1 Browsing the platform

To navigate contents and pages use contextual instructions, functions and menus:
It’s 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.
3 Access the reserved area

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 access the Reserved Area, you must sign in the Procurement Portal, in order to get the login credentials. If you have SPID (Italian Public System of Digital Identity), you can start the sign in process using the personal SPID login credentials.

3.1 Sign In

To start the sign in process, in the home page click on “Login” as highlighted in the following image. Then click on “Sign in” to start the registration process.
In the next page you can choose to proceed by manually compiling all the data or to import a file. If you need to sign in for the first time in a Appalti&Contratti e-Procurement portal, you must use the manual compilation. To know how to sign in importing a file, please refer to paragraph 3.3.

**Economic operator registration to the portal**

![Information](image)

ATTENTION: once registration has been completed and data has been sent, the information relating to Company Name, Legal Form, Social Security Number and VAT Number cannot be changed. Any changes must be requested using the “Request identification data change” button from your personal area.

**Continue filling in the data manually**

Click on “Compile manually” to enter the data in the following forms relating to the economic operator master data.

[COMPILE MANUALLY](#)

**Import data from an M-XML file**

If you have already registered on another e-procurement platform that supports the M-XML format, you can download the registry data from that platform in M-XML format and import them into this one.

Search in the other platform the data export function in M-XML format. Typically the export function can be found in the “Personal Area”, “Profile”, “Your data” section.

If you have a M-XML file click on “Import from M-XML file” to upload the compatible/available data and then proceed by verifying and supplementing any additional data that may be required.

[IMPORT FROM M-XML FILE](#)

Compile all the fields with the information required. Pay attention to enter the mandatory data highlighted with "*" and to verify if on the top of the page there are error messages. When the system requires it, click on “Add”.
In the “Main Data” tab enter all the data required, then click on “Next” to proceed.

If the economic operator does not reside in Italy, it is necessary to change the territorial area “UE Economic Operator (NOT ITALIAN) or extra UE”. In this case the form simplifies and you'll view a single field “foreign tax id”. The Italian social security number, Italian VAT, CAP, Province fields (required for an italian economic operator) will disappear.

At the bottom of the page, you must add your contact details. Pay attention to enter your PEC address correctly, it is fundamental for the Contracting Authority during the tender process.

When you have entered all the information required, proceed by clicking on "Next".
ATTENTION: if you are not resident in Italy and you don’t have a PEC address, you must enter your regular email in the “PEC” field.
In the "Addresses" tab you can add information about other offices, different from the legal address. When you have filled in the field, click on "Add". When completed (or if this information is not needed) proceed with "Next".

In the tab "Master data" proceed by entering all the owners, legal representatives, members, administrators with power of representation and technical directors. Remember to specify every charge or qualification. Among those names, choose an active subject entitled to sign the statements (Presidential Decree 445/2000) and select "YES" in the "Responsible for statements (Presential Decree 445/2000)" field.

Click on "Add" at the bottom of the page to enter all the data required. The page will be refreshed and you will see the list of the subjects entered.

In this list you can choose to edit, duplicate or delete a subject by using the following functions.
Pay attention to the “DURC” section in the “Additional data” page. If you are subjected to DURC (Italian regularity of contribution document) specify all the data required.

Click on "YES" and then choose the name of the subject entitled as signatory.

Pay attention to the “DURC” section in the “Additional data” page. If you are subjected to DURC (Italian regularity of contribution document) specify all the data required.
In the "User tab", enter the "**User name**" (at your choice) you will use to access your Reserved Area. Then read and accept the "Rules to use the telematic platform" and give your consent to processing your personal data.

In the next summary page, the system will send an email to the address you entered in the "Main data" section in order to verify it is correct. This operation will be notified at the bottom of the page, with indication of the email address used.

Please check you have received the test email, if not go back to the “Master data” tab and check/edit your email/PEC address. Otherwise, you will not be able to complete the registration process.
When you have entered all the data required, click on “Send” to submit your request for registration.

<table>
<thead>
<tr>
<th>Economic operator's main data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company name:</td>
</tr>
<tr>
<td>Company type:</td>
</tr>
<tr>
<td>Legal status:</td>
</tr>
<tr>
<td>Geographical area:</td>
</tr>
<tr>
<td>Country:</td>
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<tr>
<td>Foreign tax ID:</td>
</tr>
<tr>
<td>Registered office:</td>
</tr>
<tr>
<td>Email:</td>
</tr>
<tr>
<td>Legal representatives:</td>
</tr>
<tr>
<td>Technical directors:</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Credentials - Processing of personal data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username:</td>
</tr>
<tr>
<td>Registration required by:</td>
</tr>
<tr>
<td>Processing of personal data:</td>
</tr>
</tbody>
</table>

WARNING: we inform you that a test email has been sent to your email address, in order to verify the reference email that the portal will use to send you communications example@email.com. Before sending your request, please check that it has been received and that it is consistent with the data indicated in the summary.
The platform will show you the confirmation of the operation. **The registration is not completed.**
The data you submitted will be automatically acquired and verified by the system (or by an operator of the Contracting Authority) and then an **activation email** will be sent (check the email address verified at the previous step).

The activation mail will be similar to the one shown below. **Click on the link provided** (or copy and paste it on your browser. Be careful to copy it entirely and that there are not any spaces or interruptions).

You will view the page shown below, where you can enter your **password**.
The password must be at least 8 characters, contain at least 1 number, 1 capital letter, 1 lowercase character, 1 special character, at most 2 successive identical characters, to satisfy current regulatory requirements. The system will show you the security level of the password entered: it is recommended to choose a password with at least a “Good” level.
Proceed by clicking on “Save”. To complete the registration process, enter your password twice to verify it.
Your registration is completed! Now you can access the Reserved Area of the Procurement Portal.
3.2 Verify the access to the Reserved Area

To verify the correct access to the Reserved Area, enter your login credentials (User name and Password created in the previous step), then click on “OK”.

You will access the reserved Area, in particular in your “Personal Area”.

ATTENTION!!!

The registration process will provide you with the login credentials to access the Reserved Area. **This process will not automatically register you to an Operators List (or Suppliers List) for the Contracting Authority.** If the Contracting Authority has published an announcement or notice for an Operators List (as in a dynamic purchasing system, an electronic market, etc.), please refer to the instructions provided in each announcement or notice.
3.3 Export your data in a M-XML file to import it in a different portal

When you have logged-in, in the “Profile” section of your Personal Area the link “Download your data in M-XML format” is available. Click on it and save this file: you can use it to register in other Appalti&Contratti e-procurement platforms without entering manually all your data again.

To proceed with this function, you need to open the destination platform, click on “Sign in”, then “Import from M-XML file”.

In the next page you can choose the M-XML file you’ve saved before: click on “Import” to upload it, then it will be processed by the system and you will view all the tabs already filled in with your data. Check all the data before proceeding. If necessary, add the missing data e follow all the steps explained in the previous paragraph.
3.4 Forgot your password?

If you have lost your password, you can recover it by using the dedicated service “Forgot your password?”. Here you can enter your username or the PEC/email address you entered to register in the platform.

Click on "Send" and the system will send an email/PEC with a new “activation token” to the address you entered during the registration process. Click on the link provided (or copy and paste it on your browser, as seen before).
It will therefore be possible to create a new password.
3.5 Access the Procurement Portal using SPID

To access your Reserved Area using SPID (Italian Public System of Digital Identity), in the home page click on "Login with SPID" as shown in the following image and select your Identity Provider.
You will be redirected to the SPID authentication page as shown below (Poste ID example). Enter your SPID user name and password, then click on "Entra con SPID" to login.

Click on “Prosegui” to generate the SPID 2 access code: you will receive a notice on your SPID App. Otherwise, click on “Accedi tramite codice SMS” to receive a SMS notice. After entering the code, read the information notice on data processing and proceed by clicking on “Acconsento”.
If your authentication with SPID has completed correctly, you will be redirected again to the Procurement Portal as shown below.

In the "Reserved Area" banner on the left you will see your name, as proof of a correct login with SPID.
3.6 Sign in with SPID

When you have logged-in successfully with SPID, you can proceed with the registration on the Procurement Portal.

Click on "Register a new economic operator" as shown in the image above and then follow all the steps explained in the previous paragraphs 3.2 and 3.3.

When your registration is complete, you can go back to your Reserved Area and in the tab "Your economic operators" you will find the company name you registered.

Note that you can enter more economic operators, just click on "Sign in new economic operator" to add one.

After you have logged-in with SPID as a natural person, click on the company name of the economic operator you are going to represent.
3.7 Enable access with SPID (and link it to user/password)
If you have signed in without using SPID, you can add it at a later stage. Just click on “Enable access with external login system” in your personal area.

Click on “Login with SPID” as shown in the image below and select your Identity Provider.
Then follow the steps explained in paragraph 3.5.
4 Update your master data

You can update your master data independently: login to your Reserved Area and click on “Your data” in the Personal Area section.

You will be shown the summary of your data, as shown below.
Here you can print your registration data or edit them by clicking on “Edit”. Remember that you cannot edit independently this data:

- Company name
- Typology
- Legal form
- Italian social security number (if present)
- VAT number

This information is very critical to identify the economic operator inside the telematic platform and it is not directly editable. To do it, you must use the “Request change of identification data” function that will be described in the following paragraphs.

The editing process is the same as the registration process described above: you will see all the information required during the registration phase. When you have edited your data in the “Summary” tab you can complete this operation by clicking on “Send” or you can eliminate any modification with “Cancel”.

```
Edit economic operator data

Main data > Address > Master data > Additional data > Summary

Some personal data cannot be modified due to information control constraints by the Contracting Station. In case of need to modify such data, use the “Request change of identification data” function from the economic operator detail.

Economic operator’s main data

Field marked with * are mandatory.

Company name: * Test Ltd.
Company type: * Impresa (art. 45 c.d. DLgs 50/2016)
Legal status: * Societa a responsabilita limitata
Geographical area: Operatore economico UE (non Italiano) o extra UC
Foreign tax ID: * GB123456789
Registered office: Address: Abbey Rd.
City: London
Country: Regno Unita
Website: 

Contact: Phone: 00441234567
Mobile phone:
Email:

The PEC (Certified Email) is the preferred tool for sending communications and correspondence to the economic operator. In case the PEC is defined but not active yet please postpone the procedure otherwise the Administration will not be able to send communications that cannot yet be delivered correctly.

The Contracting Authority is authorized to send any notices and/or correspondence to the email address indicated, pursuant to Article 46, paragraph 6, of Legislative Decree 50/2016, in the knowledge that notices and/or correspondence correctly sent to the aforementioned addresses shall be deemed to be known to the addressee.

NEXT > CANCEL
```
4.1 Edit your identification data (Company merger, change VAT, etc.)

In case you need to edit one of your identification data linked to:

- Company name or denomination
- Type
- Legal status
- Italian social security number (if present)
- VAT number

it is necessary to use the “Request change of identification data” function, to describe what kind of modification you need and why.

It is very important for the Contracting Authority to understand is your modifications affect other economic operators’ data in some way.

For example, as shown in the example below, it is not necessary to edit the company name of the economic operator, because it has merged in other company already registered in the telematic platform. In this case the company “to edit” will be deleted.

For this reason, each modification of identification data needs to be evaluated and accepted by the Contracting Authority.
When you have sent correctly the request for modification, the Contracting Authority will process it and, if necessary, will contact you or notify you about the correct (or not) modification of your data.
5 Technical support

In case of technical problems during the registration process or during the use of the telematic platform, you can ask for technical support through the following channels.

In the home page you could find the tab “Technical support” or “Helpdesk request”: here you can find, depending on the type of platform, if the helpdesk service is provided by Maggioli’s technical support or by the Contracting Authority.

In the first case you have to compile all the information required and, if necessary, to attach a file with more details.

To ensure a quick analysis of the problem it is important to provide immediately all the information useful to the support service in order to solve the problem as soon as possible. For example, providing some screenshots of the error and all the steps you did before the error occurred can be very helpful.

If there is not a support form to fill in, please contact the Contracting Authority.

Warning:
Assistance service provided by the Contracting Authority, please contact its reference channels.
6 Instructions and manuals

In the home page (public access), in the "Information" section you can find this guide in the "Access to the Reserved Area" tab and all the documents helpful to use the platform (for example how to register in an Operators list, how to submit an offer, etc.) in the "Instructions and manuals" tab.

The image below is an example, please refer to the specific Procurement Portal to see all the documents available.

![Image of Procurement Portal interface]

7 FAQ

In the home page (public access), in the "Information" section you can also find the FAQ tab, where you can check all the frequently asked question of the users and the respective answers.

![Image of FAQ tab in Procurement Portal]

What is a telematic platform?

We mean the present computer system (software and hardware), through which it is possible to carry out tender procedures entirely managed digitally in compliance with the provisions of the procurement code - Legislative Decree 50/2016. The e-procurement platform, the telematic system and the Procurement portal are also understood as synonyms for the online platform, the latter refers to the component specifically dedicated to economic operators.

What is an economic operator?

Please refer to the definition of the procurement code - Legislative Decree 50/2016 art. 3. Simply, in the context of the online platform, is identified with the company that intends to participate in a procurement procedure.

How can I access and use the online platform?

The online platform is publically accessible for the only purpose of consulting the information and documents relating to the advertising, legal and transparency.

To be able to access the features dedicated to economic operators to participate in the awarding procedures the registration to the online platform is required. In the "Access to reserved area" section, instructions are available for registration and authorization to access the reserved area.

Which technological tools or equipment must be equipped to use the telematic platform?

In the "Access to reserved area" section, instructions are available for registering and enabling access to the reserved area that also include the requisites and the necessary technological equipment.
8 Indemnity

In the event of incorrect or improper use of the telematic platform, and in any case of any infringement of current legislation by the User, the Contracting Authority shall be held free and harmless, including in respect of third parties, from any damages, costs and charges of whatever nature, including any legal expenses incurred by the latter.

The Contracting Authority shall not be held liable for any malfunctions or defects in the connectivity services required to reach the telematic platform via the telecommunications networks.

The user must follow the indications given in this document, in the "Instructions and manuals" and in the FAQs published on the portal for the use of the platform, which set out the system requirements and the procedures to be followed in order to use the platform. The Contracting Authority shall not be held liable in any way in the event that the user fails to use the platform functions correctly (e.g. fails to submit an economic offer or tender).

The online submission of the telematic offer is at the sole risk of the sender for all time deadlines related to telematic tenders; the only reference calendar and time are those of the system, always visible in the header of the portal and synchronized on the Italian time referred to the UTC time scale (IEN), as per Ministerial Decree no. 591 of 30 November 1993.

The platform adopts the 00 second as its limit, therefore the times indicated in the tender notices, even if the seconds are not indicated, shall always be understood as 00.

The access to the platform may be suspended or restricted by the Contracting Authority at any time to allow for the extraordinary maintenance work necessary to ensure the development, full functionality and/or security of the platform.

Any suspension and/or limitation of such access shall be promptly notified by means of a specific "Notice" published on the portal.

The circumstances of suspension and/or limitation of such access shall not be invoked for the purposes of any claim for damages by the User and/or its assignee.