USER MANUAL

E-PROCUREMENT

PLATFORM

Powered by
NIUMACTIVE®

Summary

Images Index

1 System Access

In order to access to the portal use the following link: https://eprocurement.gefran.com, and insert your credentials.
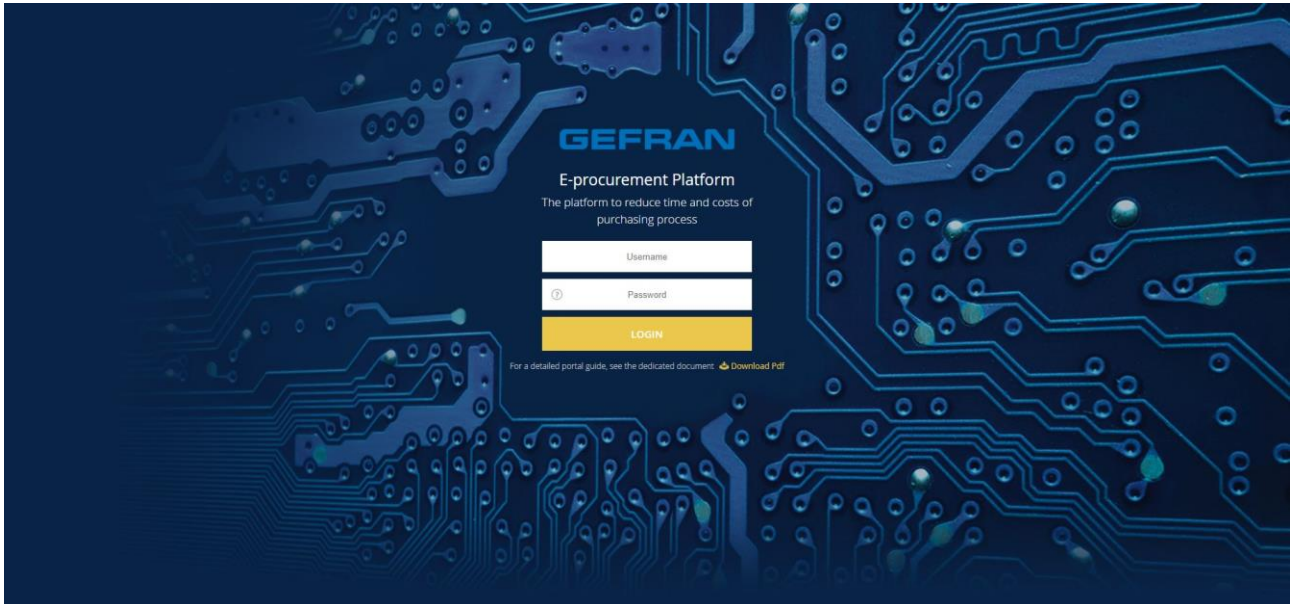
Figure 1 - Home page GEFRAN E-Procurement Portal

If you do not remember your password, you can retrieve it from the platform home page by using the "Forgot Password?" icon ⑦ , located in the field ***Insert password*** on the right*.* By clicking on the link ***Recover*** you can activate the password recovery. Digit your username and click the button ***Confirm***: a new temporary password is sent to the mail address registered in the platform (Figure 2).

Figure 2 – Password recovery procedure

Once you logged in it is possible to modify the password by selecting the section **User Area** top right (Figure 3) and clicking on **Change password.** After that, the password change screen is loaded and fill in the required fields is mandatory (Figure 4).
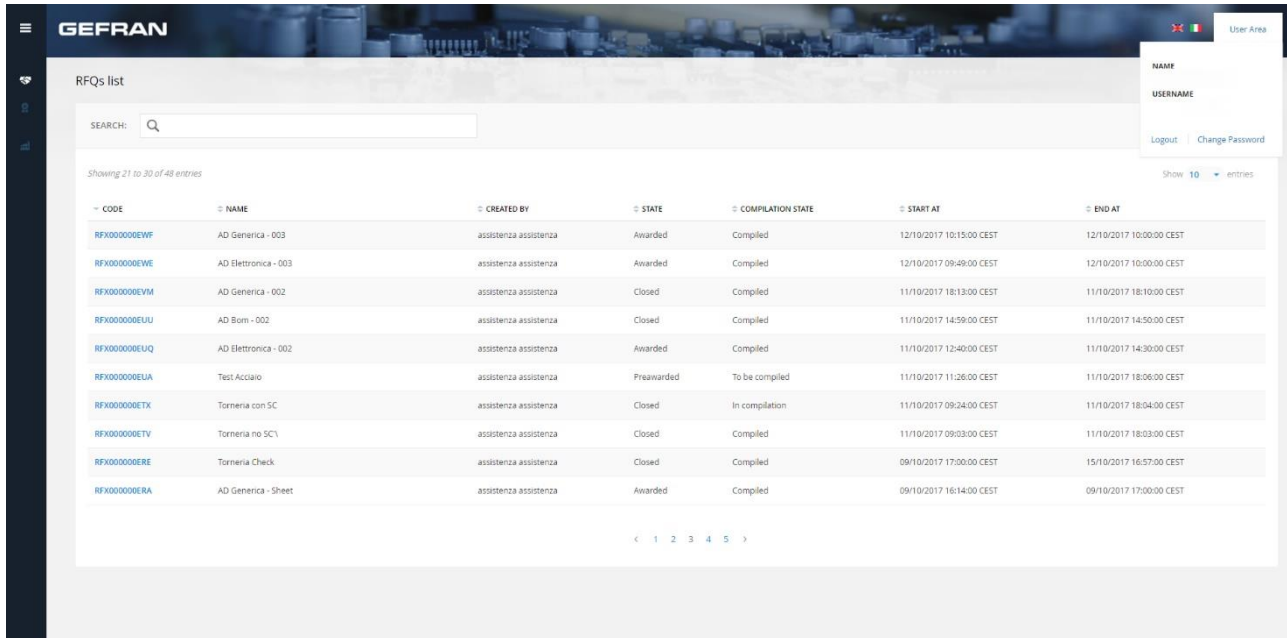
Figure 3 – Password change procedure [1st step]

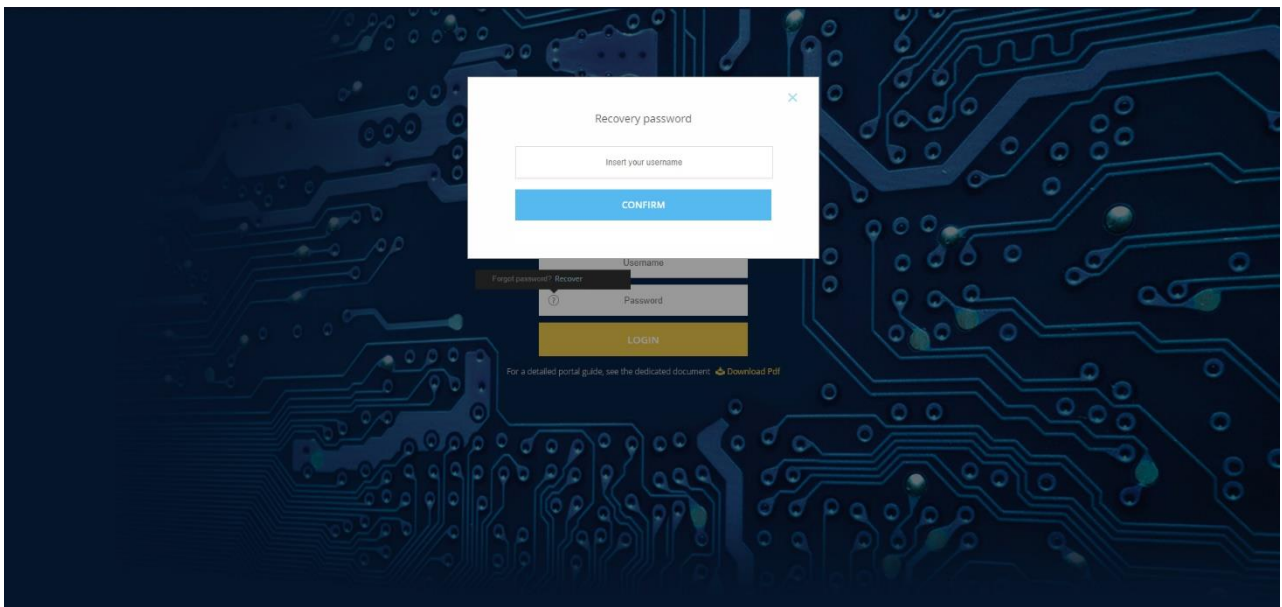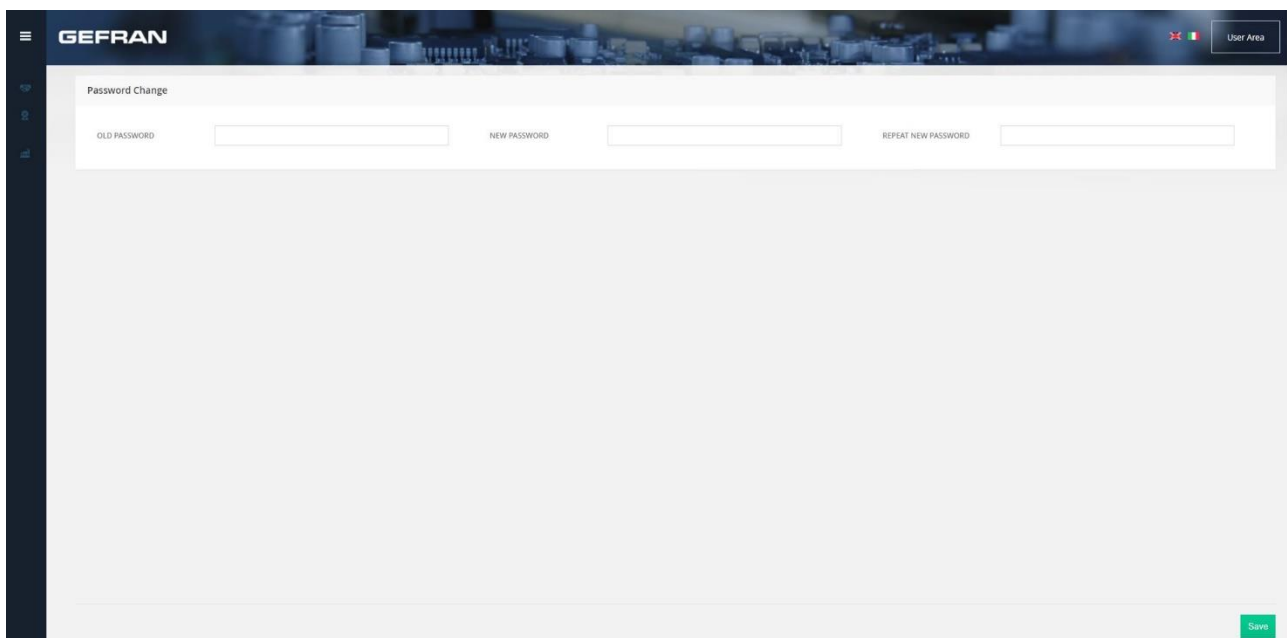*Figure 4 – Password change procedure [2nd step]*

2 Requests For Quotation (RFQ)

2.1 How to make an offer

Once logged in it is possible to search the RFQ, which you have been invited to, by selecting the RFQ section in the personal home page. (Figure 5).

Figure 5 – User area home page

Otherwise, if you accessed another portal section, you can use the menu located on the left side of the page by clicking the RFQ item (Figure 6).

Figure 6 – RFQ left navigation menu access

Accessed in the RFQ section the system will show the list of all bidding requests (below RFQ), which you have been invited to, along with your current and past requests (Figure 7). In order to find the RFQ of interest you can use the *Search* filter located in the top left side of the screen.

Figure 7 – RFQs list

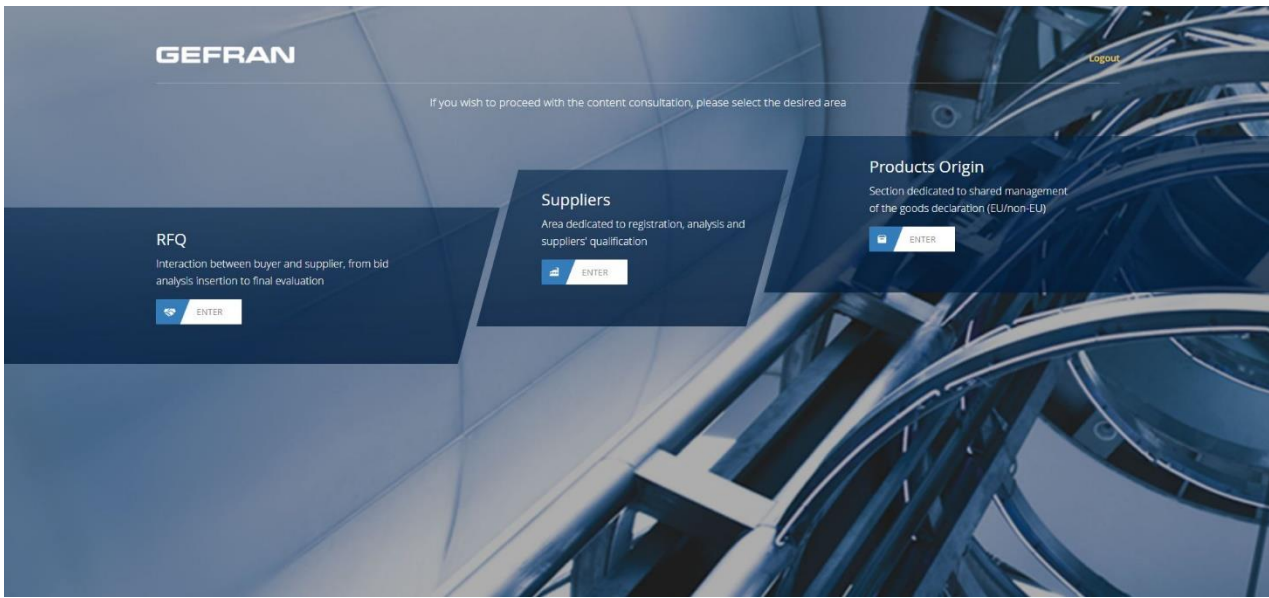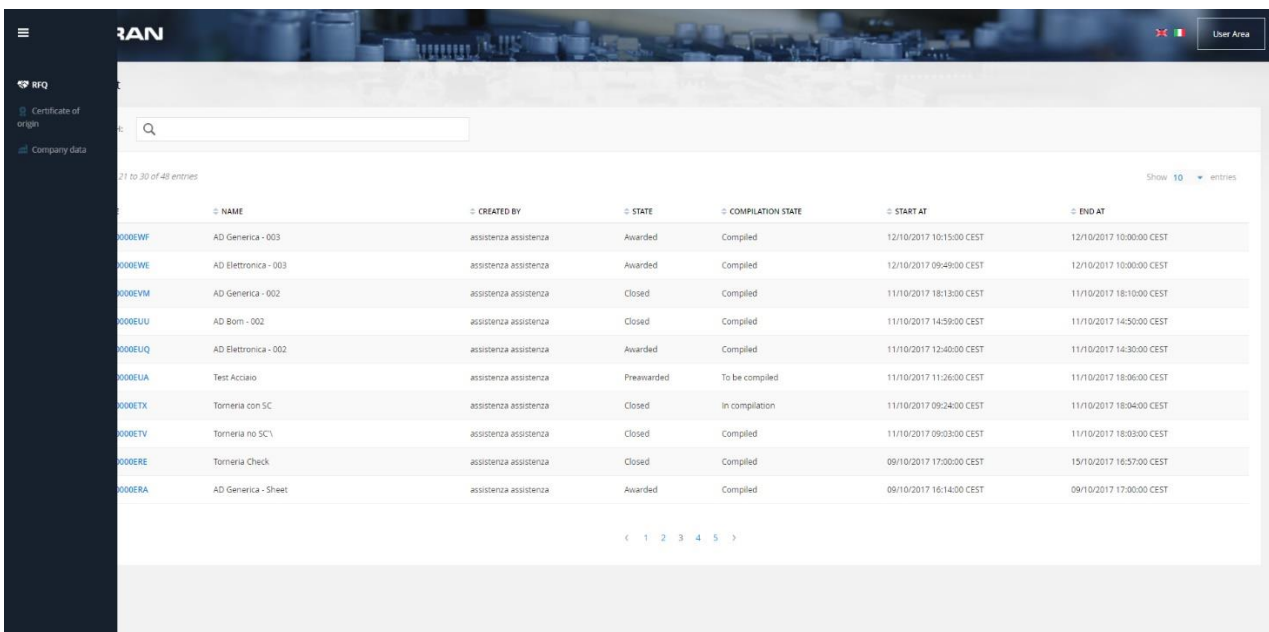During the RFQ opening time, which starts from the day reported in the field *Open Date* and ends in the date reported in the field *Closing Date*, you can compile and submit your offer. To access the detail screens of the tender press the link in the RFQ *Code* field.

By clicking on the link the RFQ detail page is loaded, with the following tabs:

- Information;
- Documents;
- Positions.

2.1.1   Information tab

The following information are showed on the *Information* screen (Figure 8):

- RFX identification code;
- RFX name;
- Type of RFX (Steel, Aluminum, Turns, Electronics, Bom, Generic)
- Mandatory positions (indicates whether it is compulsory to fill all required positions);
- Opening day;
- Closing date;
- Description;
- Currency (lists the currencies where you can quote the positions).

Figure 8 – RFQ "Information" tab compile

2.1.2   Documents tab

The **Documents** tab (Figure 9) is divided in two sections, according to the following scheme:

- **Documents attached to the RFQ** - contains the list of tender documents that should be downloaded and consulted.
- **Required Documents** - contains the list of documentation that the user have to submit and upload to the portal, in order to be able to make an offer for the RFQ.

Figure 9 – RFQ "Documents" tab compile

The documentation in the first section can be downloaded by clicking the icon ⬇ , which is located in the *Actions* field for each file in the list.

To load the required documentation in the second section you need to click the icon 🖉 , which is located in the *Actions* field of each item in the list. Once clicking the icon the file selection module will be opened (Figure 10). The user has to select the file he intends to upload to the portal, by using the field *Upload Document* and press the *Confirm* button to complete the procedure.

Figure 10 – Required documentation uploading

2.1.3 Positions tab

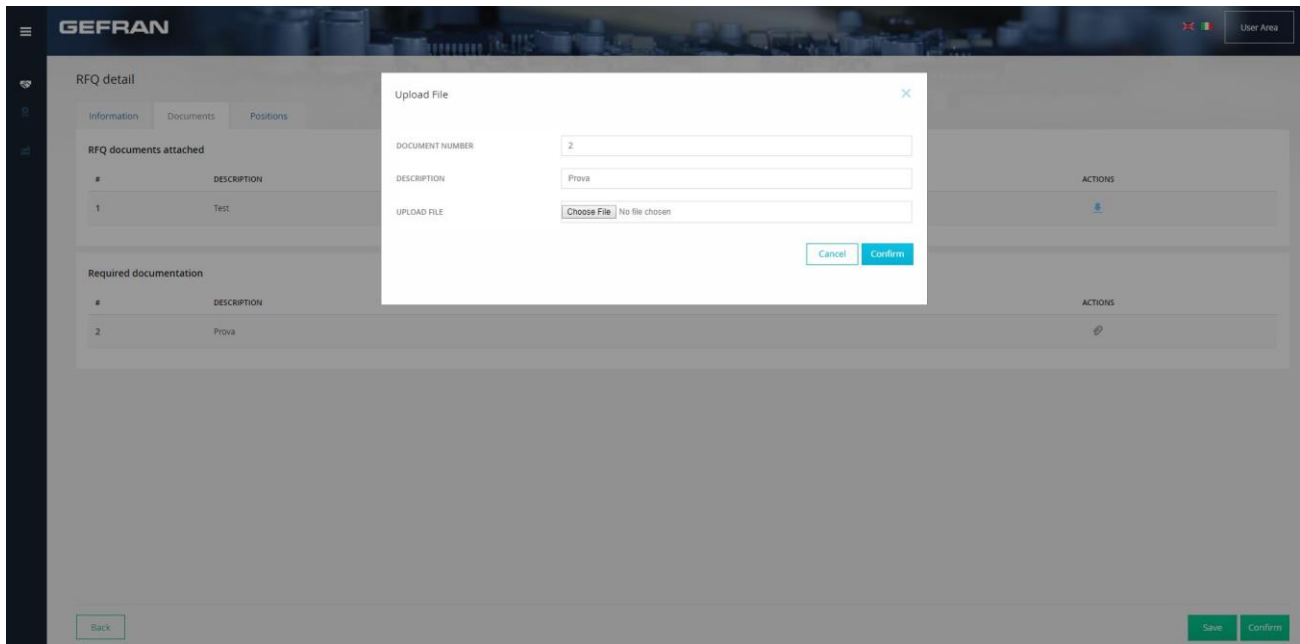On the *Positions* tab (Figure 11) you will see a list of all the materials for which you can submit an economic offer. Remember that if the value of the field *Required Positions* on the *Information* screen (Paragraph **Errore. L'origine riferimento non è stata trovata.**) was **NO,** partial quotation is also possible (you are allowed to quote only some items), otherwise it is mandatory to submit an offer for all the materials on the list.

To make your bid you must download the Excel file from the *Download Template* link, which is located at the top right of the page. Then, the file must be completed and saved by filling in the required information for each material. At last, the document must be uploaded again on the portal by clicking the *Upload Template* link: following the click, a window in which you should select the Excel file to import will appear. To complete the process you have to press the *Proceed* button (Figure 12).
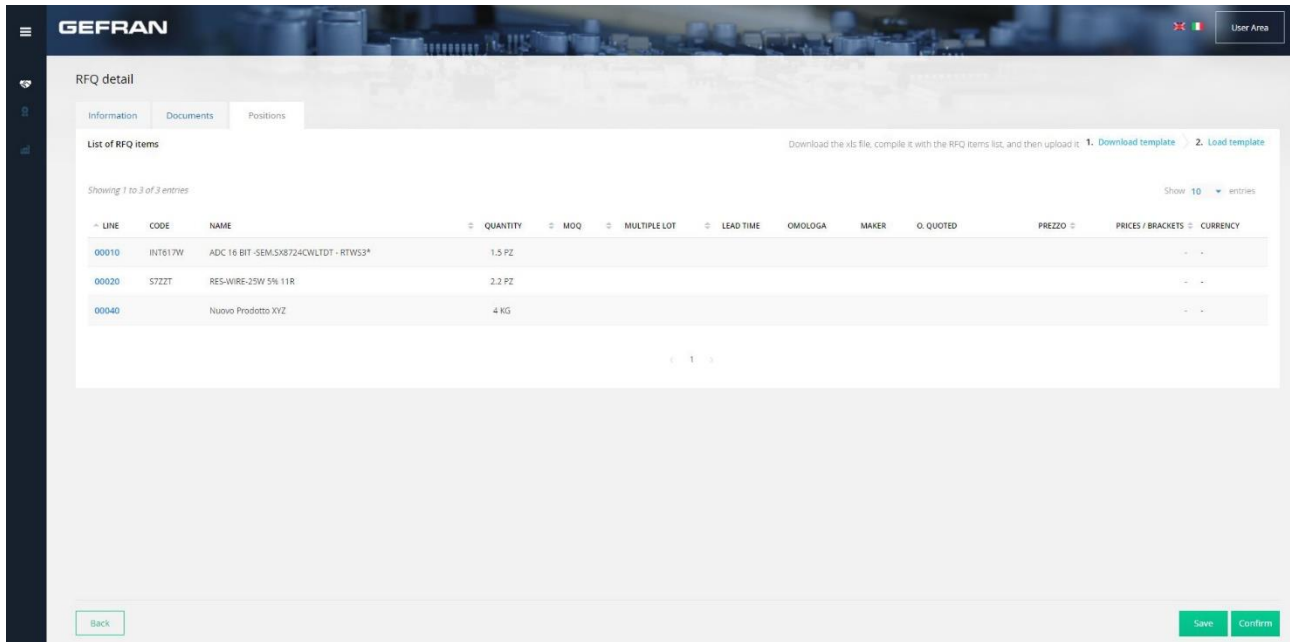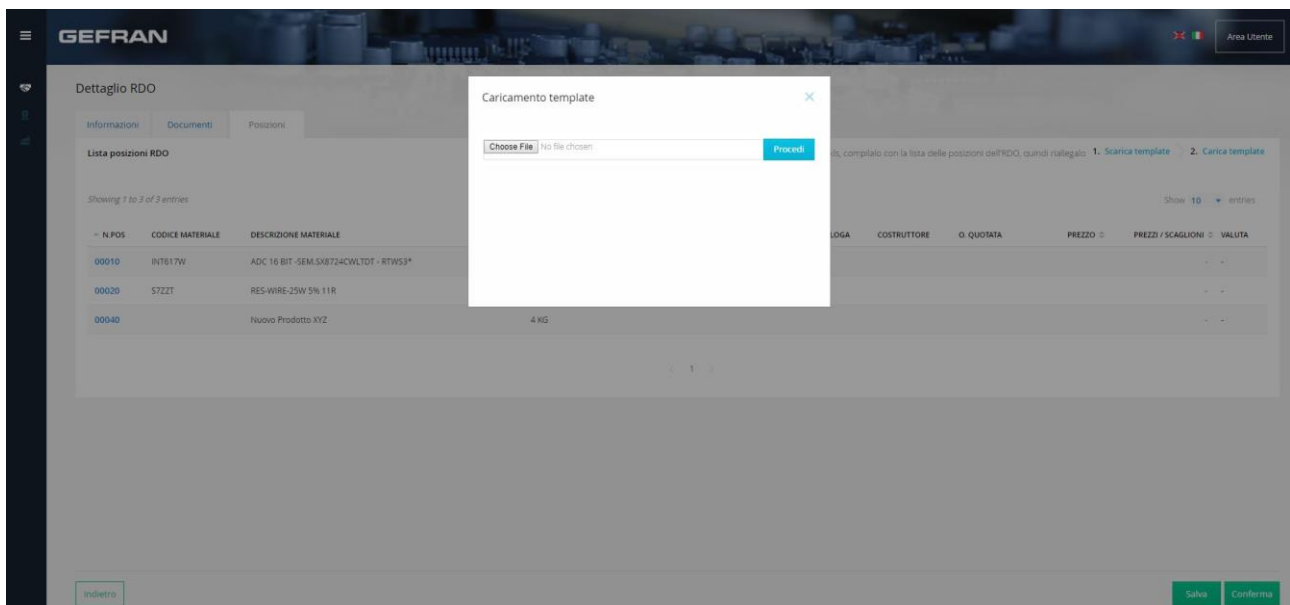
Figure 11 – RFQ "Positions" tab compile

Figure 12 – RFQ excel file uploading

Bid compilation can be saved at any time by using the **Save** button, which is located at the bottom right part of the page. This operation allows you to store partial data in order to complete them later (always before the process closing date).

Once filled in all the required documents and quotations you can send your offer to the RFQ manager by pressing the **Confirm** button, which is located at the bottom right part of the page. This operation should be done before the procedure expires.

N.B.: If you press the *Save* button, your offer it is not correctly submitted. To send it you must use the *Confirm* button before the RFQ expires.

N.B.: If you notice a mistake in the supplied material (documents or offer submitted), you can correct and confirm (*Confirm* button) the new information until the RFQ end date.

3 Products Origin

3.1 How to fill in the declaration

After the login operation you can look for the Product Origin Certification Process for which you received the compilation request mail. This can be done by selecting the **Products Origin** item on the personal home page (Figure 13).
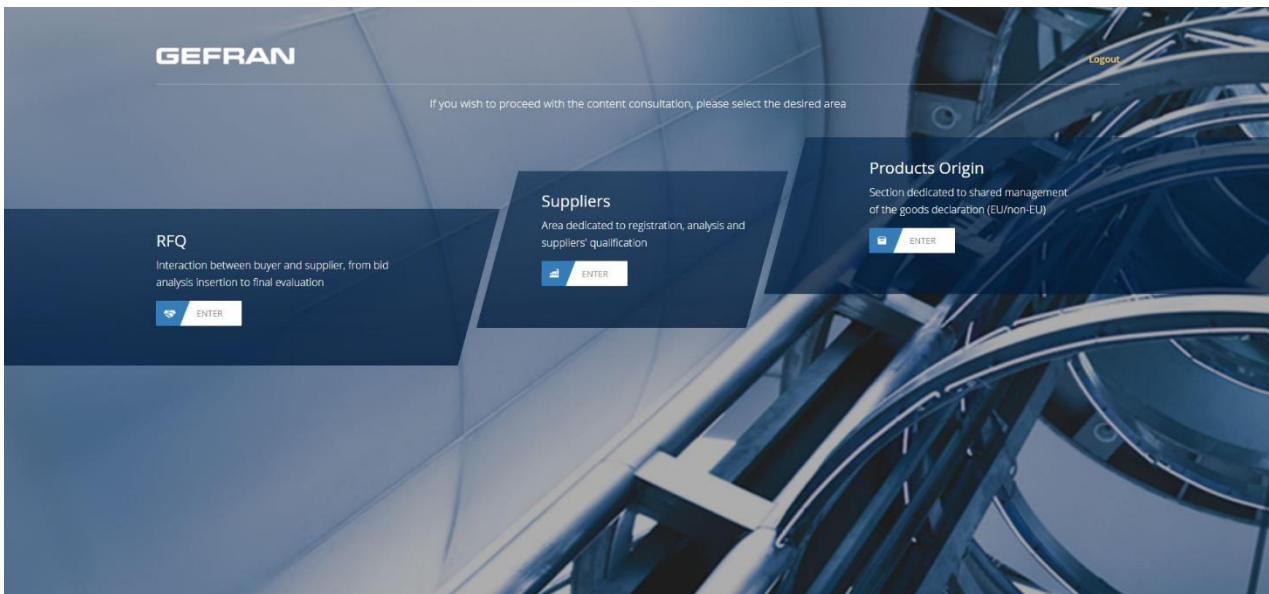

Figure 13 – User area home page

Otherwise, if you accessed another section of the portal you can use the menu located on the left side of the page, by clicking the **Certification of Origin** section (Figure 14).
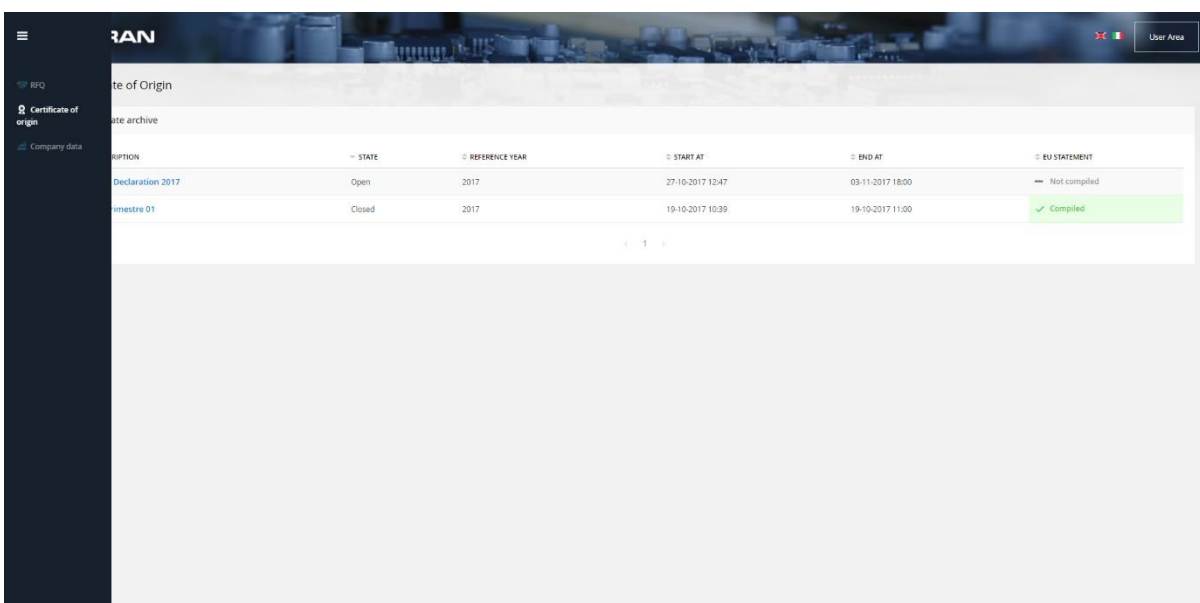

Figure 14 – Product origin left navigation menu access

Once selected the **Certification of Origin** section the system will display a list of all self-certifications of product origin to be compiled, along with those that are being compiled and already submitted (Figure 15).

Figure 15 – Self-certification of product origin list

By clicking on the description of the self-certification of product origin, you will access to the detail screen (Figure 16) where you can view the documentation to be submitted and the list of materials for which the origin was requested.

Figure 16 – Detail of product origin to be compiled

On the compilation page, you can enter data related to the materials origin in two distinct ways:

- Compile the *EU Conformity* field on the page by selecting, for each material, one of the two options present (YES or NO)
- Compile your declaration through Excel files.

To compile through Excel file you need to press the *Download Template* link located below the *Upload* button, in order to download the template to be completed. After the download you must complete the file by entering for each material an 'X' under the *EU* (C) or *Non UE* (D) column. Once the Excel document is completed it must be uploaded again on the portal by clicking the *Upload Template* link: after the click a window in which you have to select the Excel file to import will appear. Finally press the **Confirm** button (Figure 17).
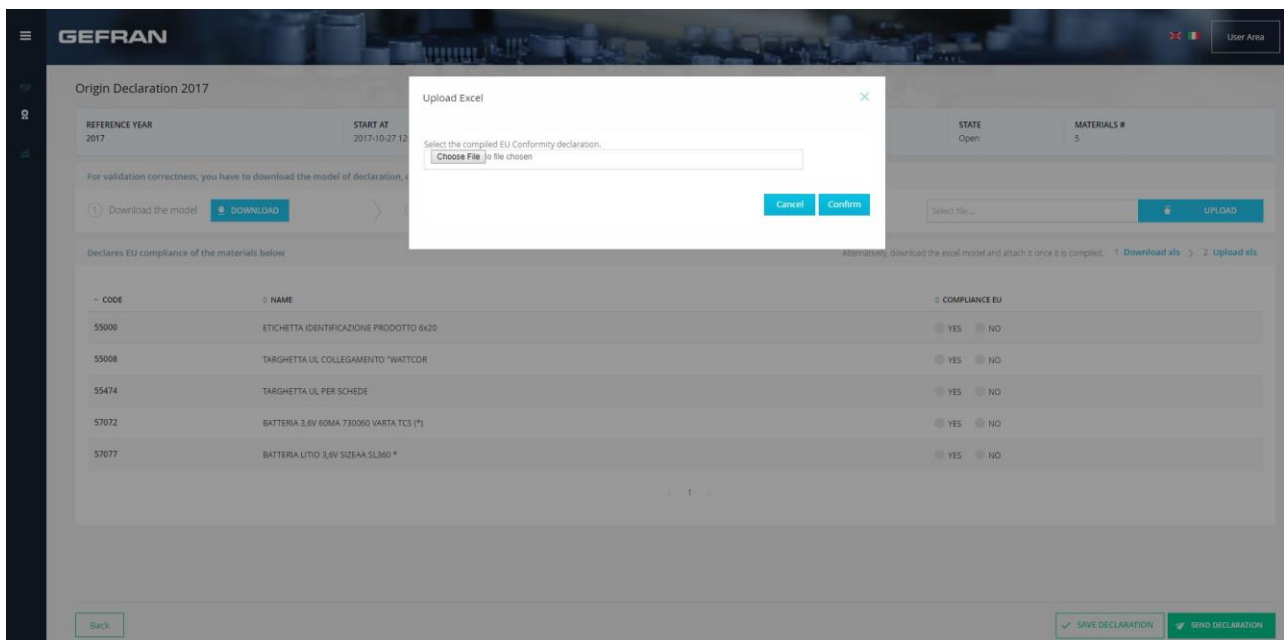

Figure 17 – Product origin excel file uploading

Self-certification of product origin can be saved at any time by using the *Save* button located at the bottom right part of the page. This operation allows you to store partial data in order to complete them later (always within the closing date of the process).

Once the *EU Conformity* data are completed, also the declaration file must be filled in and attached. To download it, you must press the *Download* button. Once you get the file, it must be completed and signed before uploading it to the portal again, by clicking the *Upload* button to select the document.

> **N.B:** If you press the *Save* button, your self-declaration it is not definitely submitted. To send it you must use the *Confirm* button before the process end.
>
> **N.B.:** If you notice a mistake in the supplied material (documents or origin declared) you can correct and confirm (*Confirm* button) the new information until the procedure end date

3.2 Declaration Approved/Rejected

Once the product origin certification was submitted to the certification officer a validation process will be executed and it will end with an approval or a refuse. If approved the process will automatically close.

If refused the mail will give you the reason and suggest you to access the portal again and correct the entered data. To modify the information you must follow again the operations described in the previous paragraph.

Figure 18 – Product origin declaration approved and rejected

N.B: After a refusal the declaration must be completed and sent back to the manager no later than the process ***Closing Date***.

4 Supplier Data

When accessing the system, you can view and modify your company's data by selecting the **Suppliers** item in the first screen (Figure 19).
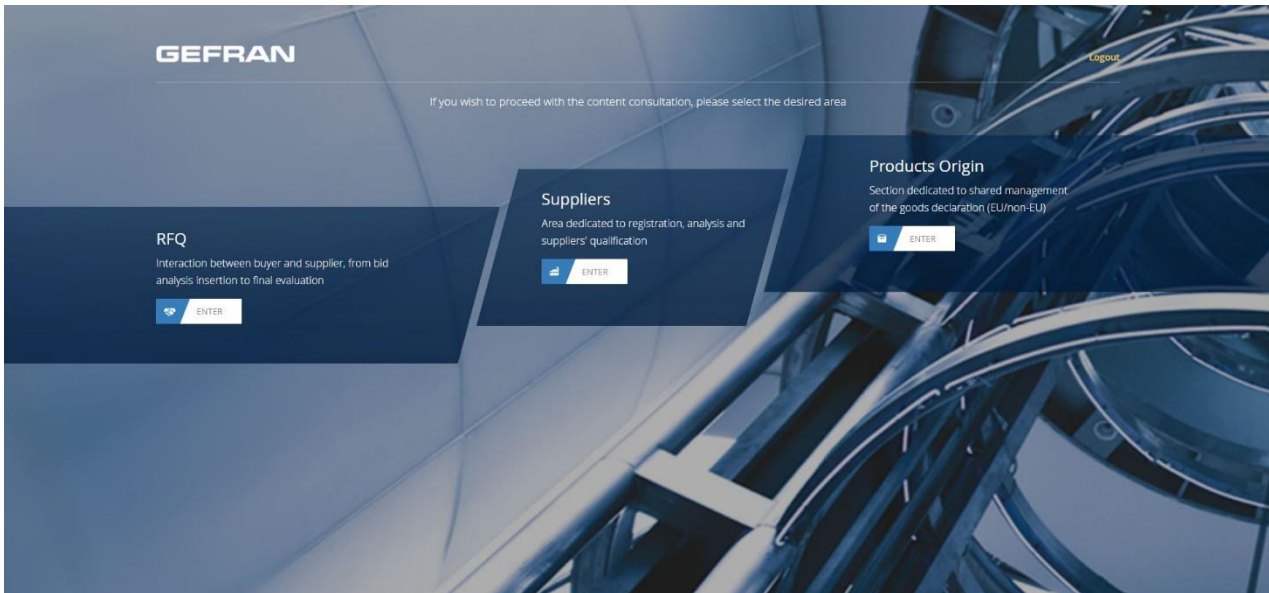

Figure 19 – User area home page

Otherwise, if you accessed another section of the portal you can use the menu located on the left side of the page by clicking the **Company Data** item (Figure 20).
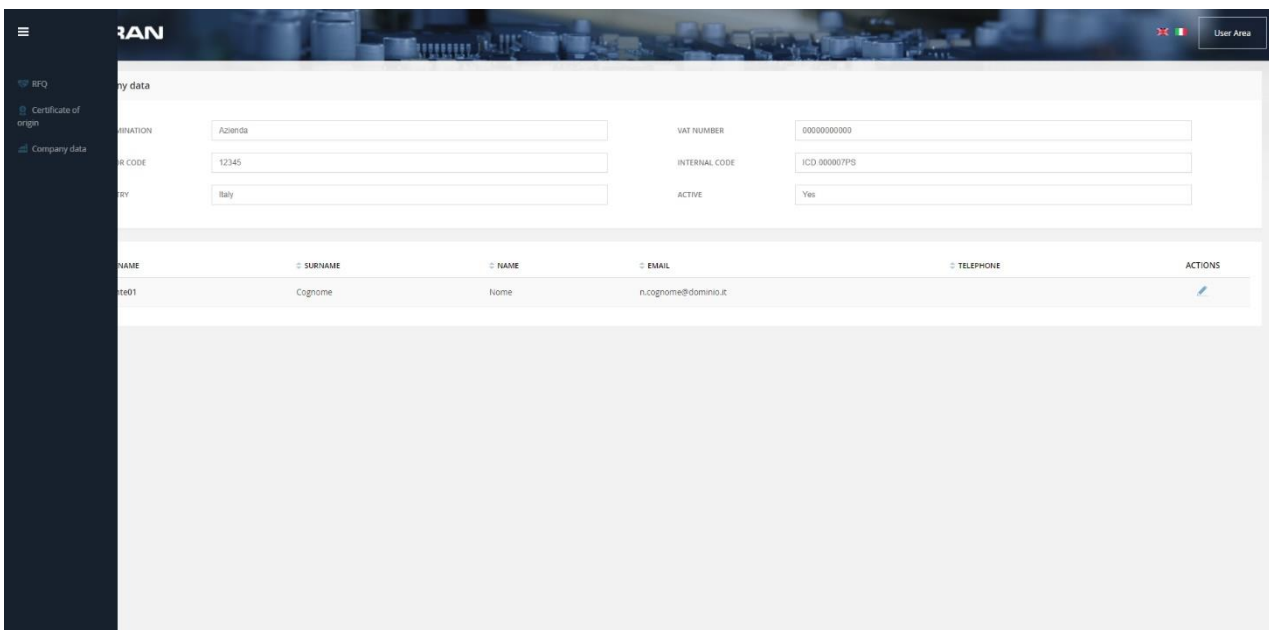

Figure 20 – User area left navigation menu access

Once logged in the **Company Data** section, the system will display a summary of your company data and its referents users. (Figure 21).

Figure 21 – Company data summary

In this section, you can edit the business contacts details, by pressing the pencil icon ✏ in the **Actions** column for each name.

In the referent data page (Figura 22), you can modify the entered data for your referent; by filling in the new information in the fields and pressing the **Save** button to end the process.

Figura 22 – User data update