Supplier Portal

e-Request

for ENISA framework contractors

15/01/2016

Prepared by DG for Informatics - European Commission and customised by ENISA.
Introduction
Introduction

Objective of this Guide:

- To explain the new application to be used for the electronic management of European Institutions requests for quotation;

- Provide a demonstration of a request for offers.
e-Procurement & e-Request

- e-Request is part of the e-Procurement suite, based on European standards, established by the CEN.

- The main goal of e-Procurement is:
  - to allow electronic document exchange between systems;
  - to avoid re-encoding and paper document processing.
The e-Procurement chain

From the suite of e-Modules available, ENISA currently uses **e-Request** and **e-Invoicing**
e-Procurement chain

*Exchanged documents between suppliers & customers*

- **e-Request**
  - Request for offer
  - Formal Offer
  - Catalogue
  - Order
  - Dispatch Notice
- **e-Ordering & e-Catalogue**
  - Receipt Advice
- **e-Fulfilment**
  - Invoice
  - Credit Note
- **e-Invoicing**
  - Payment reminder

+ Attached Documents
e-Request overview:
Architecture, Business, Roles & Workflow
Business

- e-Request supports the electronic exchange of documents for:
  - Requests for quotation from the customer (ENISA);
  - Offers sent by their suppliers;
  - Requests for clarification;
  - Amendments to requests for offers;
  - Ad-hoc documents
Required formats for the documents

- All documents uploaded to the e-Request platform MUST be in **.PDF** or **.TIF** file format. (no **.DOC** or **.XLS**)

- e-mail notifications to the customer and to the supplier are in **.msg** format.
e-Request: method of working

• 2 mechanisms:
  ➢ Cascade
  ➢ Reopening of Competition (used by ENISA)

• 2 types of business:
  ➢ Services
  ➢ Goods
Business

- Available services types:
  - Fixed price (used by ENISA)
  - Request for offer (used by ENISA)
  - Time & means
  - Quoted time & means
  - Proximity time & means
  - Extensions, amendments & replacements

- The various services types are configured for each framework contract.
e-Request Roles (for supplier)

- **SDA (Supplier Data Entry Agent)**
  - Reads requests and linked documents (Technical Annexes etc.) received from the Customer (ENISA);
  - Prepares proposals, offers and related documents.

- **SAS (Supplier Authorised to Sign)**
  - Same as ‘SDA’ plus...
  - Formally sends proposals, offers and related documents to the Customer (ENISA).

*Roles are granted by framework contract, and only once the framework contract has been signed by BOTH the supplier and ENISA.*
Re-opening of Competition workflow

Customer Portal (ENISA)

- Request for quotation
  - Preparation [Draft]
  - Approval [Ready for Submission]
  - Send to multiple contractors [Sent]

- Reception of Proposals [Proposal Received]
  - [Proposal opened]
  - Proposals EVALUATION [Proposal evaluated]

- Proposal Acceptance [Ready for Formal Offer]

- Reception of Formal Offer [Formal Offer Received]

- Formal Offer Acceptance [Formal Offer Accepted]

Supplier Portal

- Reception of the request
  - Acknowledgement
  - Send Proposal(s)

- Reception proposal Acceptance
  - Send Formal Offer

Specific Contract for signature
e-Request Electronic Workflow

- **Customer Portal**
  - ENISA may **cancel** a request for offers at any time during the process (*Justification is mandatory*).

- **Supplier Portal**
  - The Supplier may **withdraw** their offer at any time in the process (*via Ad hoc document*).

*After an offer made in e-Request has been formally accepted by ENISA, the Supplier will duly receive a signed order (specific contract).*
Step-by-Step Demonstration
Access to Supplier portal:

• **How does ENISA contractor access the application?**
  - Supplier Portal URL: [https://webgate.ec.europa.eu/supplier_portal](https://webgate.ec.europa.eu/supplier_portal)
  - Prerequisite 1: you have a valid ECAS account
  - Prerequisite 2: ‘Access rights’ have been requested and granted (see below).

• **How are ‘Access rights’ granted?**
  - Fill in ‘e-Request Registration form’ (provided by ENISA)
  - The declared contact person(s) and their ECAS accounts are registered in the system;
  - Only the declared Single Point of Contact (SPOC) will receive email notifications from e-Request *(make sure this email account is actively checked on a regular basis).*
Supplier Portal: Welcome Page

https://webgate.ec.europa.eu/supplier_portal

You will first be requested to enter your ECAS credentials!!

Welcome to the Supplier Portal!

We recommend the use of Internet Explorer to open the Supplier Portal.
# e-Request: Home Page

## European Commission Supplier Portal

### Customer Organization Request Reference Document Type Sent Date Contract Step Next action State

<table>
<thead>
<tr>
<th>Customer Organization</th>
<th>Request Reference</th>
<th>Document Type</th>
<th>Sent Date</th>
<th>Contract</th>
<th>Step</th>
<th>Next action</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>DIGIT.B.4</td>
<td>DESIS II-001900-6000343621-REQ-01</td>
<td>Formal Offer</td>
<td>36CE03785650926</td>
<td>In Preparation</td>
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<td>In Preparation</td>
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<tr>
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<td>Formal Offer</td>
<td>30CE04443480045</td>
<td>In Preparation</td>
<td></td>
<td></td>
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<tr>
<td>DGT</td>
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<tr>
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<td>29/09/2014 10:55</td>
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<td></td>
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<tr>
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<td>Acknowledgment</td>
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<td></td>
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<td>Initial Request</td>
<td>29/09/2014 09:55</td>
<td>30CE0669420050</td>
<td>Received</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DIGIT.B.4</td>
<td>DESIS III-000044-6000494078-REQ-01</td>
<td>Initial Request</td>
<td>29/09/2014 09:55</td>
<td>30CE0669420050</td>
<td>Received</td>
<td></td>
<td></td>
</tr>
<tr>
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<td>Proposal</td>
<td>33CE04105750704</td>
<td>Sent</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7620 item(s) found, displaying 106 to 120.
e-Request: Mailbox

- Mailbox tabs (access to views)
- Mailbox Filter area
- Mailbox window
e-Request: Mailbox Tabs

- **Inbox**
  - Contains all documents (Requests for offers, ad-hoc documents etc.) received **from** the customer (ENISA)

- **In preparation**
  - Contains all documents (proposals, offers and ad-hoc documents) that are "in preparation" by the contractor but not yet sent to the customer (ENISA)

- **Sent**
  - Contains all documents that have been sent **to** the customer (ENISA)

- **All**
  - Shows all documents together in one folder
# e-Request: Workflow Steps & Icons

<table>
<thead>
<tr>
<th>This icon...</th>
<th>Stands for...</th>
<th>Step Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>a gear</td>
<td>The corresponding document is unprocessed: action should be taken.</td>
</tr>
<tr>
<td>🌟</td>
<td>thumbs up</td>
<td>The corresponding document has been processed. No further action is required.</td>
</tr>
<tr>
<td>🔄</td>
<td>information</td>
<td>The corresponding document is for information only. No further action is required after reading the message.</td>
</tr>
<tr>
<td>🕒</td>
<td>an hourglass</td>
<td>The corresponding document has expired.</td>
</tr>
<tr>
<td>✖️</td>
<td>a cross</td>
<td>The request has been cancelled. No further action is required.</td>
</tr>
<tr>
<td>👎</td>
<td>thumbs down</td>
<td>The request has been refused.</td>
</tr>
</tbody>
</table>
e-Request: Related Documents

**The Related Documents area:**

- lists all the existing documents linked to the same request
- shows the workflow advancement of the request
- shows the currently opened document in bold
- is sorted by the date - in ascending order
e-Request: Next Document Bar

- Shows which document you need to create next in the workflow.
- If several documents can be created, the drop-down list displays “List of possible docs to create”, and you need to select which of the documents you want to create.
- In the example below, the next document to be created is the "proposal"
e-Request: Check the Inbox

• **Inbox**: displays all of the received requests/documents

• **There are multiple ways to identify the request(s) to be processed:**
  - Example - filter on ‘**Document Type**’ and in ‘**Step**’ select ‘**To be processed**’
  - Click on "**Next Action**" to sort data
Acknowledgment

- The 1st time the supplier opens a request in the Inbox, an automatic acknowledgement receipt is sent to ENISA.
Proposal

- **Deadline for the "proposal" procedure is displayed in:**
  - The "Next Action" column of the mailbox

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- **Check the Inbox**
- **Acknowledgement**
- **Create/send Proposal**
- **Create/send Offer**
Create a Proposal:

- Click Create in the "Next document" bar

**Initial Request**

- **General Requirements:** See annexe
- **Delivery Delay:** 10.0 day(s)
- **Expected Start Date:** 31/10/2014

**Attachments**

- DESIS III-000062-ATT-01 (Technical Annex)

**Time line**

- **Proposal (deadline):** 07/10/2014 23:59

In order to continue with the process of the Request, the EC expects (one of) the following document(s): Proposal

[Create button]
Create a Proposal:

- **Type the supplier’s reference for the proposal:**
- **Indicate if your proposal is final or not:**
  - The supplier can send several proposals until the proposal deadline or until he sends the ‘final’ one;
  - Only the ‘final proposal’ will be taken into account by Customer for evaluation;
  - Once the supplier selects the ‘final proposal’ option, nothing else can be sent for this procedure.
Create a Proposal:

- Add attachment(s) at document level
  - e.g. technical proposal (offer), financial offer form and any other document requested by ENISA
Save, Send, Close buttons

- **The Save button:**
  - Stores the current data
  - Allows to you to **Close** the document and finalise the input later.
  
  *Saved documents are listed in the ‘In preparation’ mailbox*

- **The Send button:**
  - Is only available to users with **SAS role**.
  - Saves the document and sends it to the customer (No more editing possible)
  - Closes the document if sending was successful

  *Sent documents are listed in the ‘Sent’ mailbox view.*
Proposal scenarios

If by the proposal deadline...

- **A final proposal is sent:**
  - The Customer (ENISA) will select this proposal on the opening date.

- **No final proposals have been sent:**
  - The system considers the latest non-final proposal as the ‘final’ one.
  - The supplier receives a "Close Document" form in their Inbox

- **No proposals have been sent:**
  - The system sends an Expire document
Extra features:
Ad Hoc Documents & Amendments
Sending Ad Hoc Documents

*The application allows the supplier to send the following documents at any time in the workflow:*

- **Supplier Information Request**
  - To request additional information from the Customer (ENISA).

- **Supplier Additional Information**
  - To provide additional information to the Customer, usually to respond to an "Information Request form" from the Customer.

- **Request for Delay (expiry date) Extension**
  - To officially ask for an expiry date extension, **ONLY** in circumstances beyond one's control (in case of *force majeure*). Customer to assess whether to accept.

- **Withdrawal**
  - Can be sent at any stage of the workflow to let the customer (ENISA) know that the supplier does not want to prepare an offer for the current e-Request.
Sending Ad Hoc Documents

- **Click the "Create Ad hoc Doc" icon**

- **It is not possible to add an ‘Ad hoc Doc’ when the workflow step of the request is "Cancelled", "Closed" or "Refused".**
Amendments

- Search for the "Amendment requests" in the Inbox
  - (for example – ENISA modifies the ‘Technical annex’)

- An amendment request follows the same procedure as an initial request.
Conclusion
Benefits of using e-Request

- **Cost savings on encoding the data**
- **Better data quality**
  - Implemented business rules (on dates, attachments ...)
  - Attachments are in original format
  - All data exchanged between the supplier and customer are saved in ONE file
- **Faster time line**
  - Less delay of document exchange between ENISA and the suppliers
  - No wasting of time due to document scanning
  - E-mail notifications
- **Transparency for the suppliers**
- **Environmentally friendly (Paperless workflow)**