Supplier Management System

Supplier User Manual

Leonardo Global Solutions SpA	Tipo:	Pagina: 1 di 19
Titolo: Manuale Fornitori		
Codice:	Release:	Data: 2018-09-28
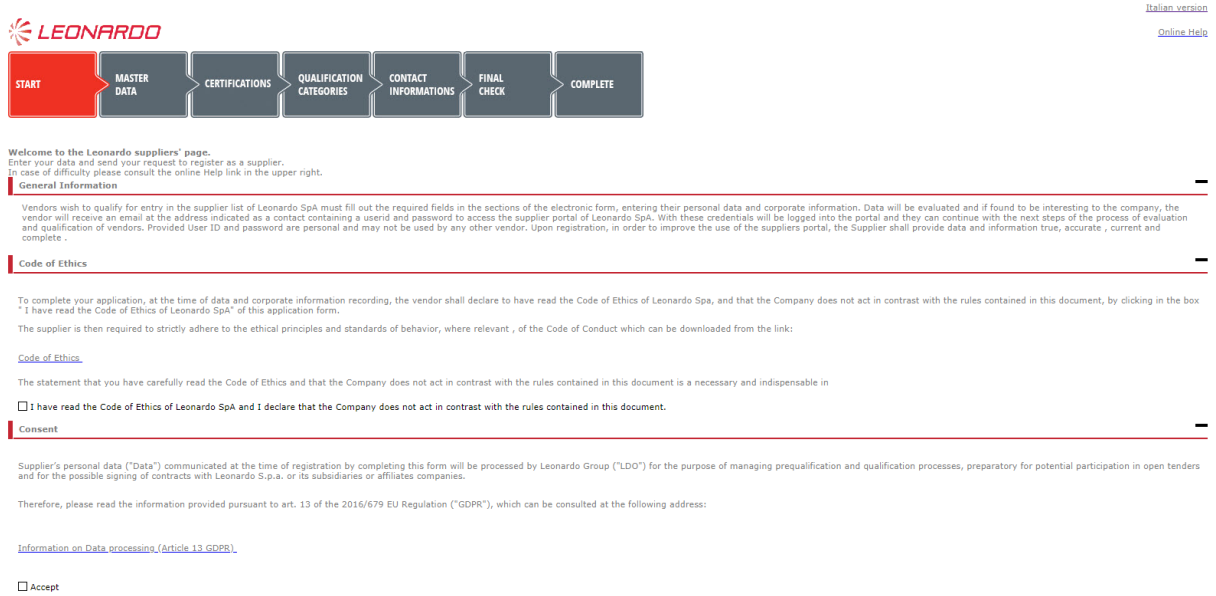
Summary

1. Register of Suppliers

The Single Register of Suppliers supports supplier lifecycle management from initial application to pre-qualification and qualification and subsequent performance evaluation steps:

supplier-registration.leonardocompany.com

Figure 1– Register of Suppliers

For detailed information on the registration process, you can use the Online Help function available directly on the Self-Request page (top right).

2. Logon to the portal page

The Leonardo Procurement Portal can be reached on internet via the link

https://procurement.leonardocompany.com/irj/portal
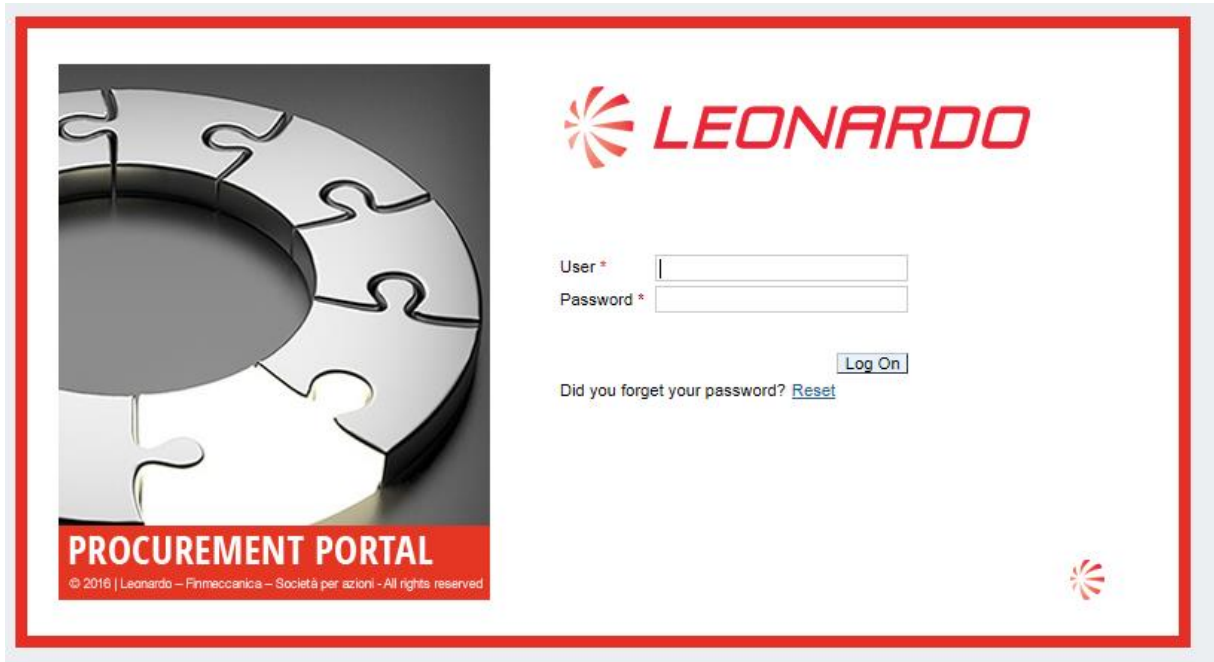
Figure 2– Logon page

After keying in the data, click on the 'Logon' button or press Enter to access the portal and manager your information.
Browser compatibility:

Windows 7: IE11 / Mozilla Firefox
Windows 10: IE11 / Mozilla Firefox
Mac OS High Sierra: Mozilla Firefox
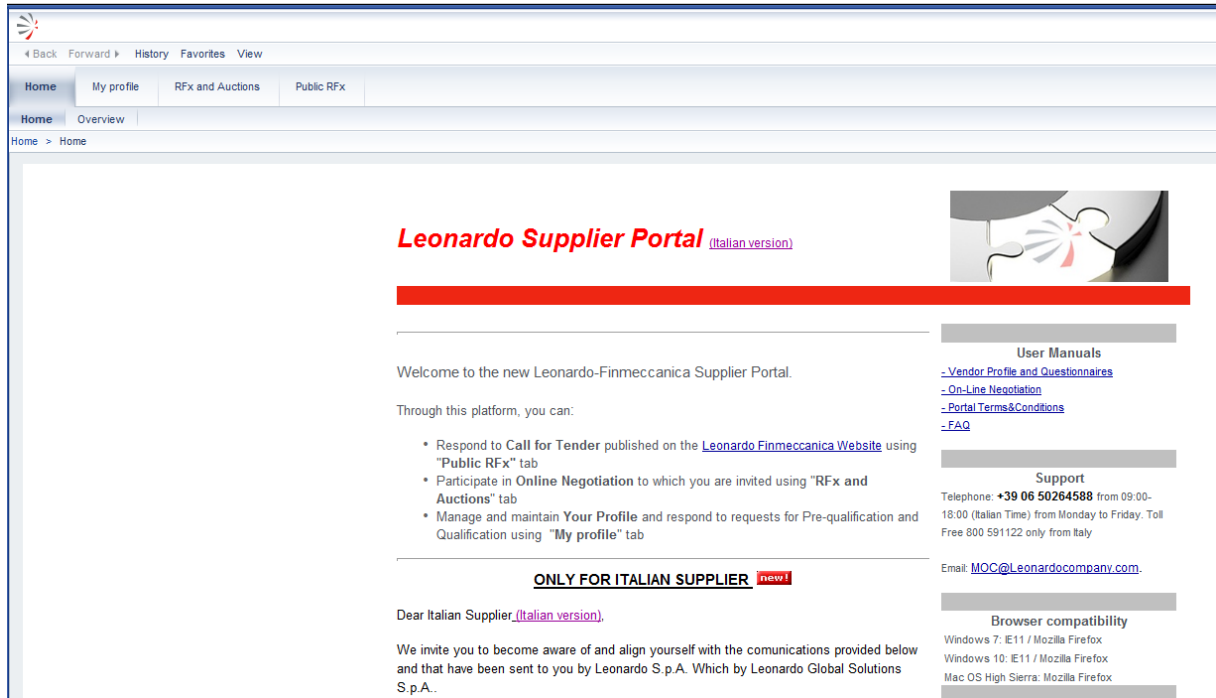
2 Home Page

When you enter, a screen will appear showing key information about the portal and the general context.

Figure 3– Home page

On the right hand side of the Home Page one will see a series of links which will allow one to view the manuals and directly access the sections where one can manage details (Vendor Profile) and Negotiation Events. One will also find contact info for the Help Desk for users of the portal:

- Toll Free Number 800.591122 (+390650264588 if calling from abroad): Monday to Friday 9 a.m. to 6 p.m.
- Email Account: moc@leonardocompany.com

At the top of the page one will see some tabs which put together the main areas of interest for the supplier:

- **My Profile**: here one finds a summary of all the details about the supplier and operations involved in the Pre-qualification (placement in the supplier list) and Qualification processes.
- **RFx and Auctions**: from this tab one can work on negotiation events for which the supplier intends to submit his candidacy. 5
- **Public RFx**: this area shows all notices of bids for tender published on the Leonardo website.

For operations involving inserting and managing in the Leonardo Supplier List, the supplier must access the My Profile tab.

3. My Profile

When you enter, a screen will appear showing key information about the portal and the general context.

Figure 4 – My Profile

In the box Activity Request, there are questionnaires for the supplier. To access the questionnaires directly, simply click on the To Do List box:

Figure 5 – Accesso diretto questionari

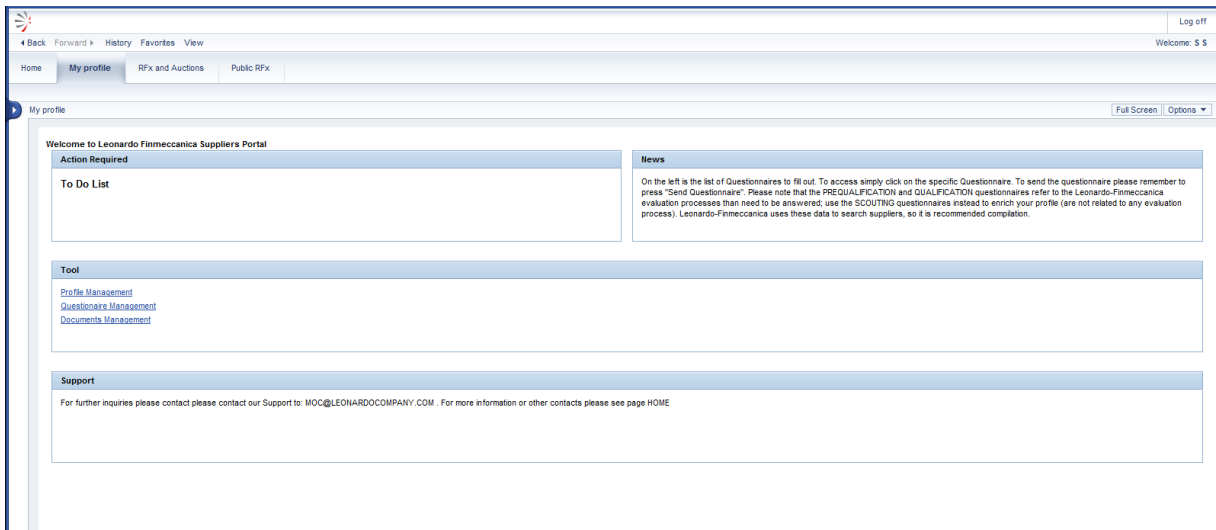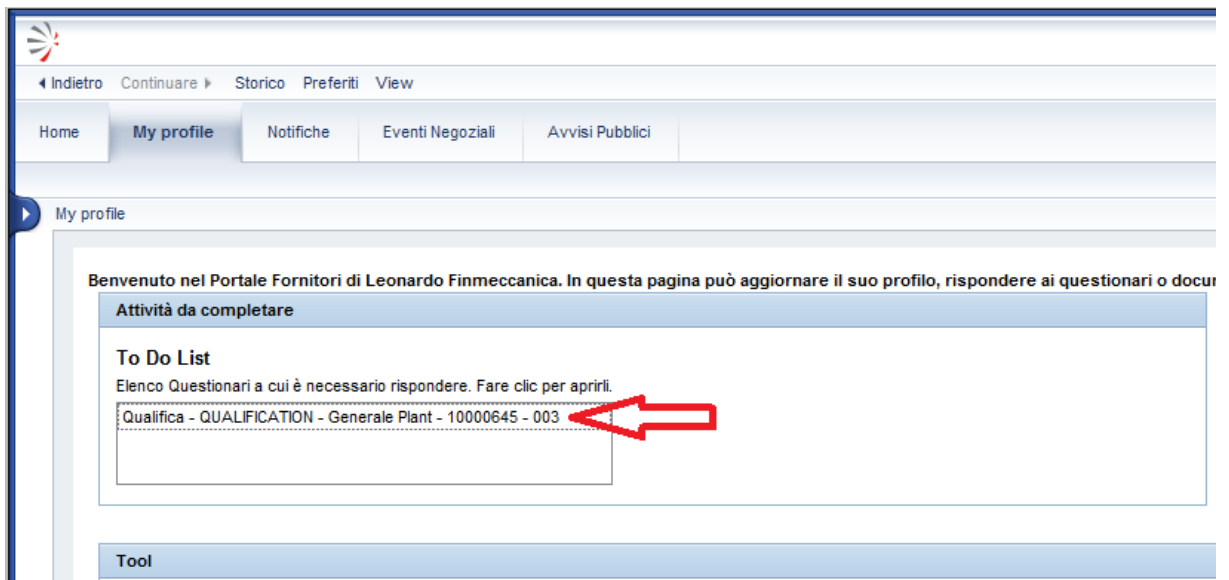In the Box *Tool* there are 3 link:
- Profile Management

- Questionaire Management
- Documents Management

3.1 Profile Management

The supplier will now see a new window containing all the information about details and all the documents associated with that User ID. There are 4 tabs on the window:

Master Data
This area shows the main identifying data about the user, such as Company Name, Legal Setup, VAT Number, PEC and Pre-qualification Status. This last field provides information about the assessment status for insertion in the Supplier List. This field may have the following values:

- **Self-Candidacy**: the user has completed the self-registration process, but still has to define his own Vendor Profile, filling out the scouting questionnaires. To do so, he must access the Questionnaire Tab, click on the links with red signal lights and provide the requested information.
- **Potential**: The user has completed his own Vendor Profile. To be placed on the list (and be able to take part in a negotiation event) the Buyer must launch a Pre-qualification request.
- **Pre-qualified**. The supplier has successfully completed the Prequalification process.
- **Pre-qualified in concession**. The supplier belongs to one of those categories provided for under the status of Pre-qualified in concession.
- **Pre-qualification expired**: Registration with the Leonardo Supplier List lasts 12 months, before the expiry date, the supplier must receive a proposal for a Pre-qualification review process. Otherwise he will be removed from the Supplier List.
- **Pre-qualification denied**. The evaluation of the Pre-qualification process has had a negative outcome.

Addresses and Contacts
This form contains the addresses of the registered headquarters and production sites registered by the supplier, the contact given as main reference plus any additional references.

Qualification Categories
This form contains the product categories for which the supplier has submitted his candidacy.

Questionnaires
All the questionnaires published by the system towards the supplier are shown, to fill them out expand the detail by clicking on the first left hand column and then click on the questionnaire link.

Documents
On the documents tab you will find a summary of all the documents the supplier has uploaded onto the system, including those attached to the questionnaires.

The following paragraphs describe in detail the operations associated with these areas.

3.1.1 Master Data

This first form shows the data associated with the supplier. Especially, the following appear:

- Company Name
- Legal Setup
- VAT Number and Tax Code
- Certified Email Address
- Chamber of Commerce Registration Number
- References
- Company purpose
- Pre-qualification Status

Any of the values keyed into the fields can be changed. To do so, click above on the Edit button and then update the field you want to change. After changing, you must click above on the Save button. The system will then ask to certify the change by self-certification signed by the legal representative of the firm, to be attached to the request for a change. Should the company name change, one will have to upload a scanned certificate of the Chamber of Commerce. If the supplier is in Potential status, these changes will come into effect immediately. If a Pre-qualification process has already been launched for the supplier, the changes will be taken over by the Vendor Management, which after proper reflection, will update the record.

3.1.2 Addresses and contacts

This tab sums up information to do with the offices and contact persons. The supplier can make out a change request, clicking above on the Edit button and then updating the fields to be changed. The tab has two grids referring respectively to Addresses (Registered Headquarters and other Production Sites) and Contacts (Main Reference and secondary contacts).

Figure 6– Addresses and Contacts

On the Addresses table, after clicking above on the Edit button, one can change any of the values keyed into the fields, whether they refer to the Registered Headquarters or to a Production Site. To do so, click on the field to be changed and write in the new value. Once the change has been made, click on the top on the Save button. The system will then ask to certify the change by self-certification signed by the legal representative of the firm, to be attached to the request for a change. Should the company name change, one will have to upload a scanned certificate of the Chamber of Commerce. If the supplier has a Potential status, these changes will come into effect immediately.
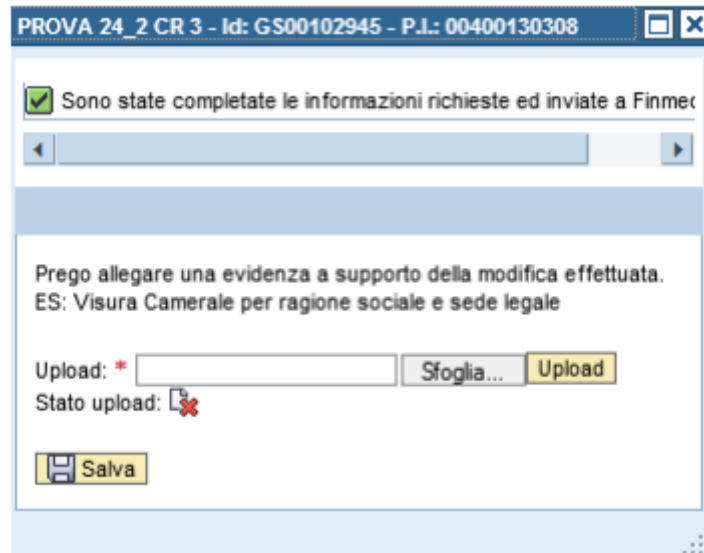
Figure 7– self-certification

To proceed, click on Browse to find the file in the computer, then on Upload and finally on Save. Should a Pre-qualification process for the supplier already have been launched, the changes will be taken over by the Vendor Management, which after suitable evaluation will handle updating of the record. In the latter case the system will return a message confirming creation of the request for changing the record, with detail of the id of the request. In the example shown on the image below, the requested id is 000070000084.
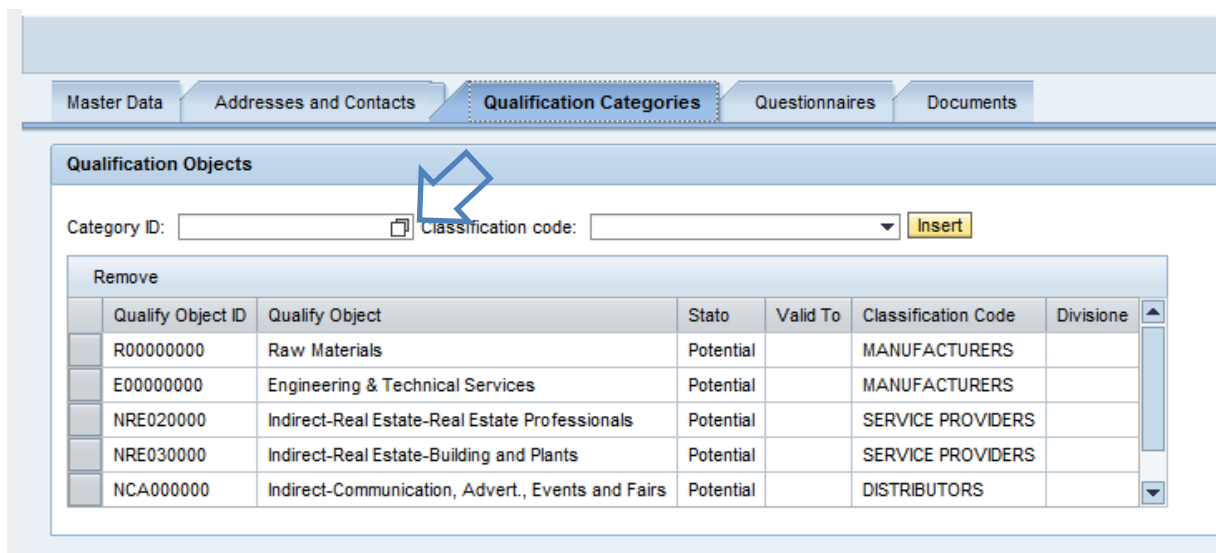

Figure 8– Confirm of personal information change request

The supplier will receive a notice as soon as the amendment process has been completed. The procedure for changing the contacts grid is similar. Each time a change is made, one will be asked to upload a document signed by the legal representative confirming the request.

3.1.3 Qualification Categories

The Qualification Categories tab shows all the categories the supplier has submitted his candidacy for. For each category submitted, the supplier will receive a Scouting questionnaire to fill out and in later stages a Qualification questionnaire. The categories may be keyed in at the time of registration or at any later time from this tab. To do so, click on the top on Edit, and then open the category search menu as shown on the following image:

Figure 9– Qualification Categories change

A window will now open which will help the user to find the category. A word identifying the Product Category must be keyed into the Description field preceded and followed by the wildcard character "*"; this will allow one to include in the search all the Categories containing such a word. After having made out the Description field, click on the "Start Search" button. In the example below, the word Components is used to search related Categories.
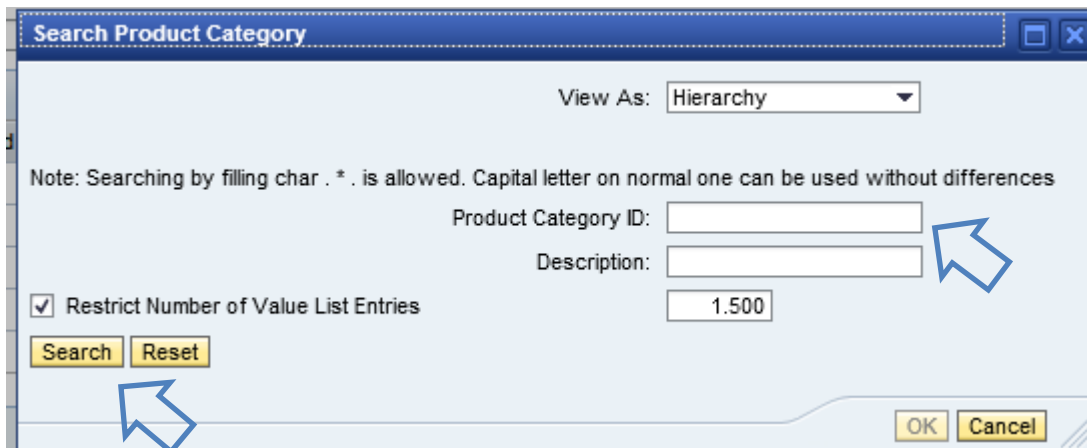
Figure 10– Selection of Qualification Categories

The outcome of the search will appear in the following window:

Figure 11– Categories search

One can now choose one of the cells highlighted in green to put the value of the relevant category into the main form. Once the code has been keyed into the Category ID field of the Tab Product Categories, one must set the kind of activity which the supplier performs in the context of the chosen Category. One must then choose a value from the Classification menu, as shown on the following page.
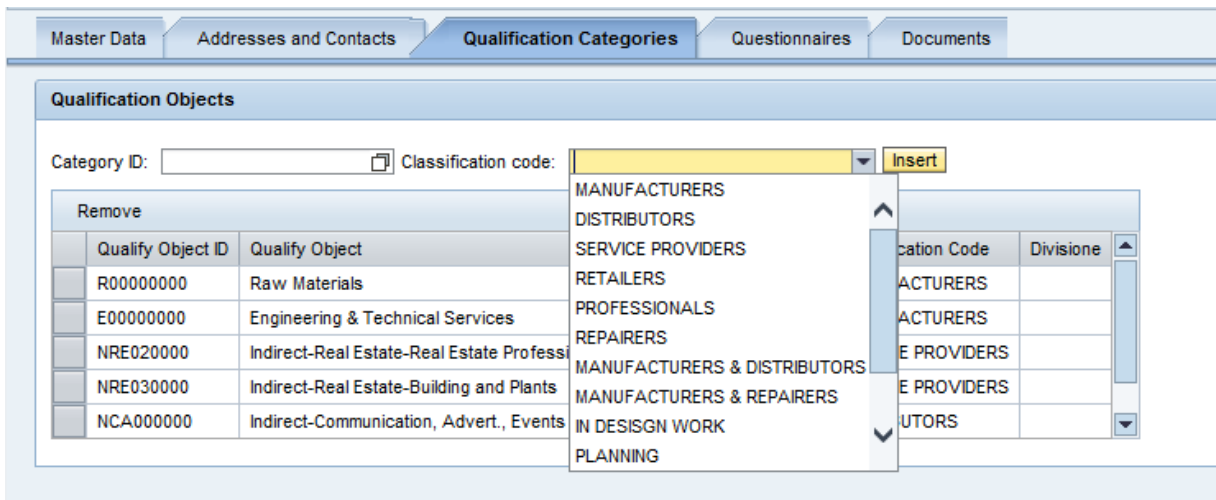
Figure 12– Classification

Now click on the Insert button to complete the insertion process for the new category. After having made all the changes, click on Save to set the changes. As a result of these changes, scouting questionnaires will be published for the new category. However, should the supplier wish to eliminate one of the keyed-in categories, he can do so only if no Pre-qualification/Qualification has been launched nor is any Qualification currently valid in the same Category. The supplier can remove one of the listed categories by clicking above on the Edit button, choosing the line with the category to be removed and then clicking again on the *Remove button*.

3.1.4 Questionaires

During the various steps of the Pre-qualification and Qualification process in the Supplier List, information and documents are exchanged between the system and the supplier by filling out Questionnaires. To access them, click on the Questionaries List on MyProfile page
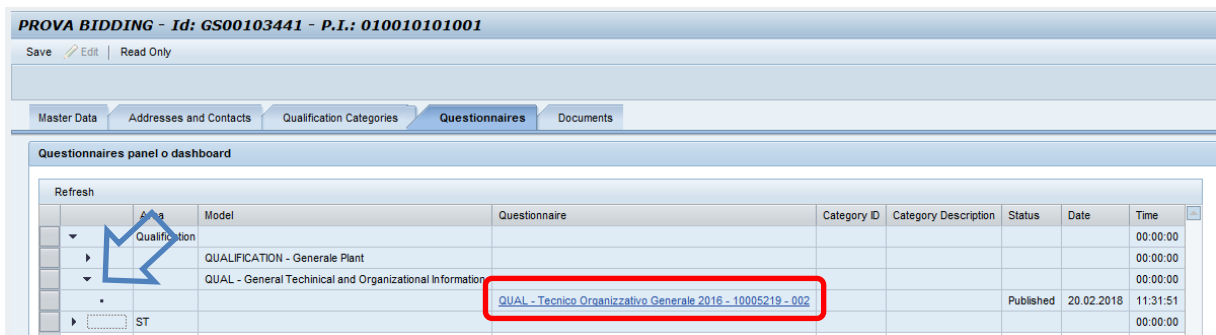

Figure 13– Questionnaires selection

Click on the left on the arrows of the first column to expand the Questionnaires tree, which is divided by area (Qualification and Scouting).

The status column represents the status of the questionnaire:
- Published: the questionnaire has been published and is awaiting editing
- Response Sent: the questionnaire has been edited and delivered properly, and awaits evaluation

The Vendor Profile questionnaires come in two categories:
- General Questionnaire
- Category Questionnaire (one for each product category for which the supplier has submitted his candidacy)

After opening the line for the specific questionnaire one can click on the link in order to open the questionnaire.

Figure 14– Questionnaires Example

The questionnaires appear as on-line forms, with different kinds of questions:
- **Multiple Choice**: if the question is obligatory, one must key in one of the values indicated under the words "Choose one of the following".
- **Free text**: if the question is obligatory, one must key in a text describing the answer. **Matrice**: è necessario compilare per ogni colonna i dati richiesti, seguendo la tipologia di dato rappresentativo (se numerico inserire solo valori contenenti le cifre da 0 a 9, senza caratteri

- **Matrix**: for each column one must fill out the requested data, following the kind of representative data (if numerical, only insert values containing digits 0 to 9, without special characters such as dots, % etc.). Should no data be available, insert a default value (for example 0 if numerical).
- **Annexes**: in certain cases, the questionnaires ask for a document to be attached. To do so, look for the file on your computer via the Browse button and then click on Upload. In some cases, the questionnaire calls for certain document models. In these cases, one can download the model, clicking on the link, and then make out and saved the model offline and then upload as described above.
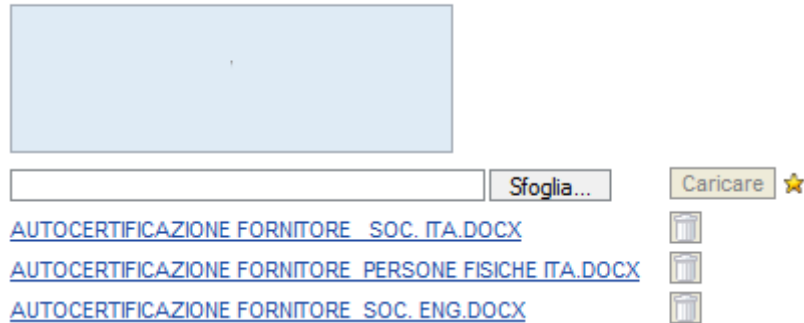

Figure 25– Attachment upload/download

The system says that the answer to a question (or a document one must attach) is obligatory by presenting the symbol ⭐ next to the text of the question.

At the top and bottom of the form one will see a bar with these functions:
- **Save**: while making out the form the system will allow one to save the work done so far. At a later access, the system will allow one to proceed with the work, keeping previously saved data.
- **Delivery of the questionnaire**: after filling out the questionnaire one must click on this button to deliver the form to the system. **Warning: without this step the questionnaire will not be taken into account.**
- **Print**: this function allows one to export the Questionnaire in Excel format.
- **Print PDF**: this function allows one to export the Questionnaire in PDF format

Figure 36– Questionnaires Tool Bar

At the time the questionnaire is delivered, the system carries out a check on the validity of the answers provided and completeness of obligatory questions. In case of mistakes or missing data, the top and bottom of the form shows a message referring to the question to be completed.

Figure 47– Questionnaires Error

The supplier must go back to the reference of the question shown and fill out or correct the inserted data.

3.2   Questionaire Management

Link to Questionaires for the Supplier.

3.3   Documents Management

Link to Documents for the Supplier

4 Pre-qualification Requests

In order to be placed on the Leonardo Supplier List and be invited to negotiation events, the supplier must fulfil the Pre-qualification process.
Pre-qualification status identifies the condition of the supplier being present on the Leonardo Supplier List, and is the same for all Divisions.
The supplier can check his own Pre-qualification status on the General Company Data tab.

At first, when the registration and scouting process has been completed, the status will be Potential.

At the time the Leonardo activates the Pre-qualification Request, the supplier will receive a notice and will find a series of Questionnaires to make out in his private area.

After completing the questionnaires the supplier must wait for the outcome of evaluation by the Central Pre-qualification Office.
At the end of the process the supplier will receive notice of the outcome of evaluation.

The Pre-qualification status lasts 24 months (Pre-qualification Successfull) or 12 months (Pre-qualified with Reserve), after which the supplier will be set in Expired Pre-qualification status.

If the supplier has a currently valid automatic mode Qualification status, a Prequalification review will be started up suitably in advance of expiry.

5 Qualification Requests

In Leonardo's Supplier List, the Qualification status is by Division and by Product Category. This means a supplier may for example be Qualified for one Division, whereas he may not have a Qualification status or may have a negative Qualification status for another division.