



Supplier Management System

Supplier User Manual

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1. Logon to the portal page

The Leonardo-Leonardo Procurement Portal can be reached on internet via the link <https://procurement.Leonardo-Finmeccanica.com>.

To connect to the portal we suggest using the Internet Explorer browser with versions below 11.

After keying in your User ID and Password which you will have received by email, the system will oblige you to change your initial password.

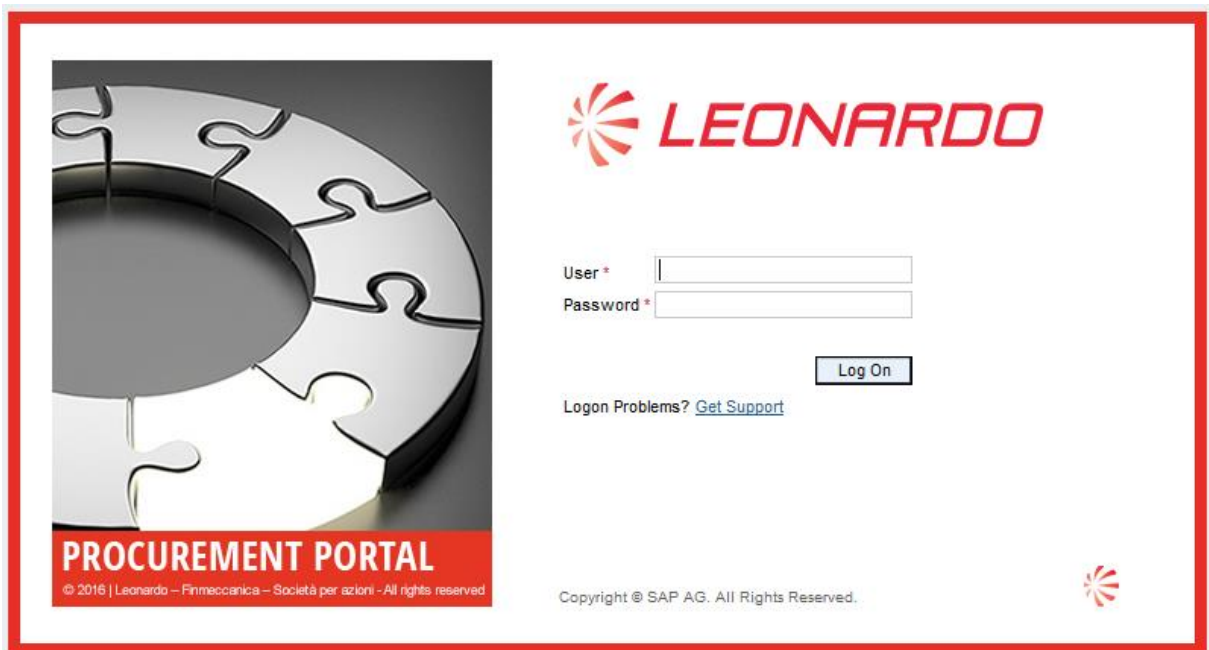


Figure 1– Logon to the portal page

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

2. Home Page

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

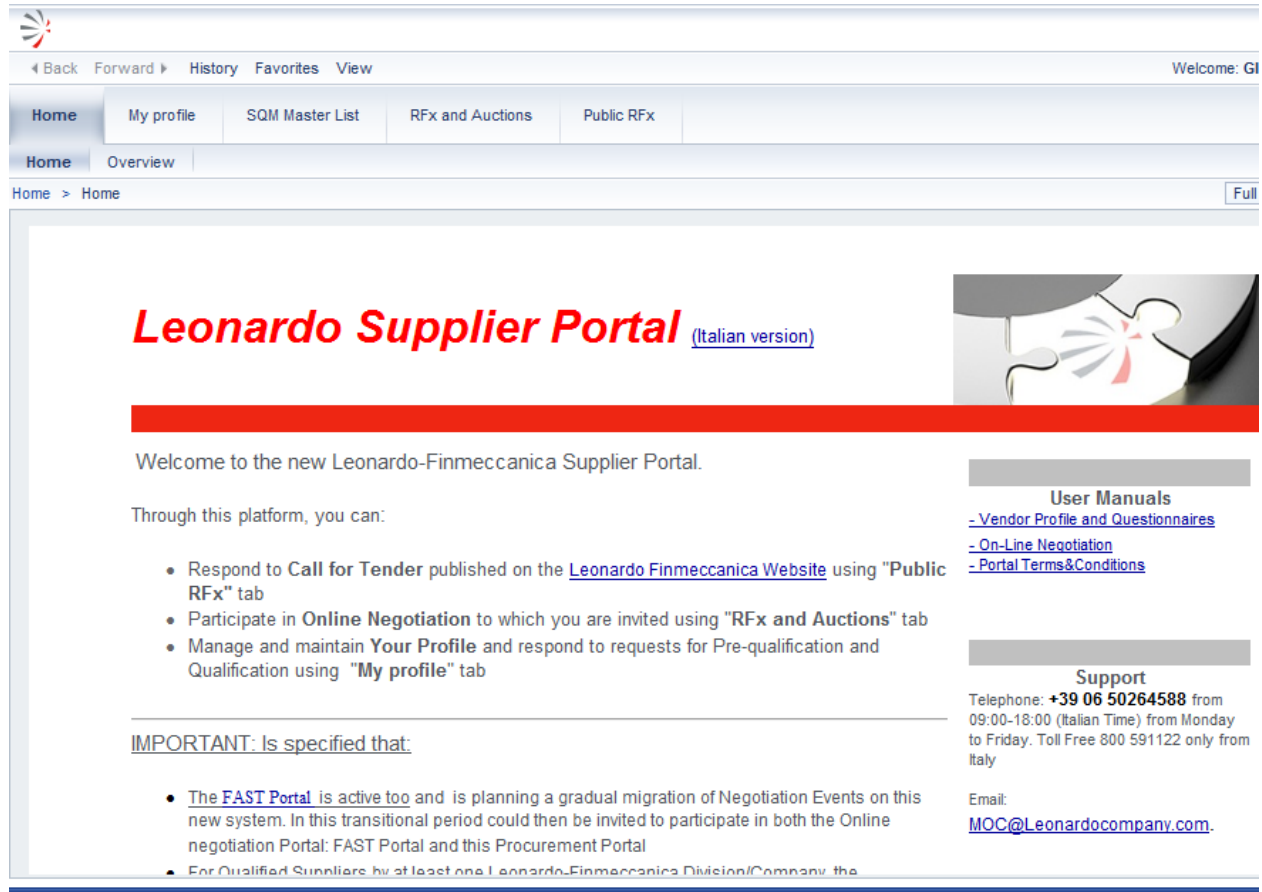


Figure 2– Home page of the portal

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.

- **Public RFx:** this area shows all notices of bids for tender published on the Leonardo-Leonardo-Finmeccanica.com website.

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

3. Supplier Data

To access and view all personal information, click on the “My Profile” tab and then click on My Desk.

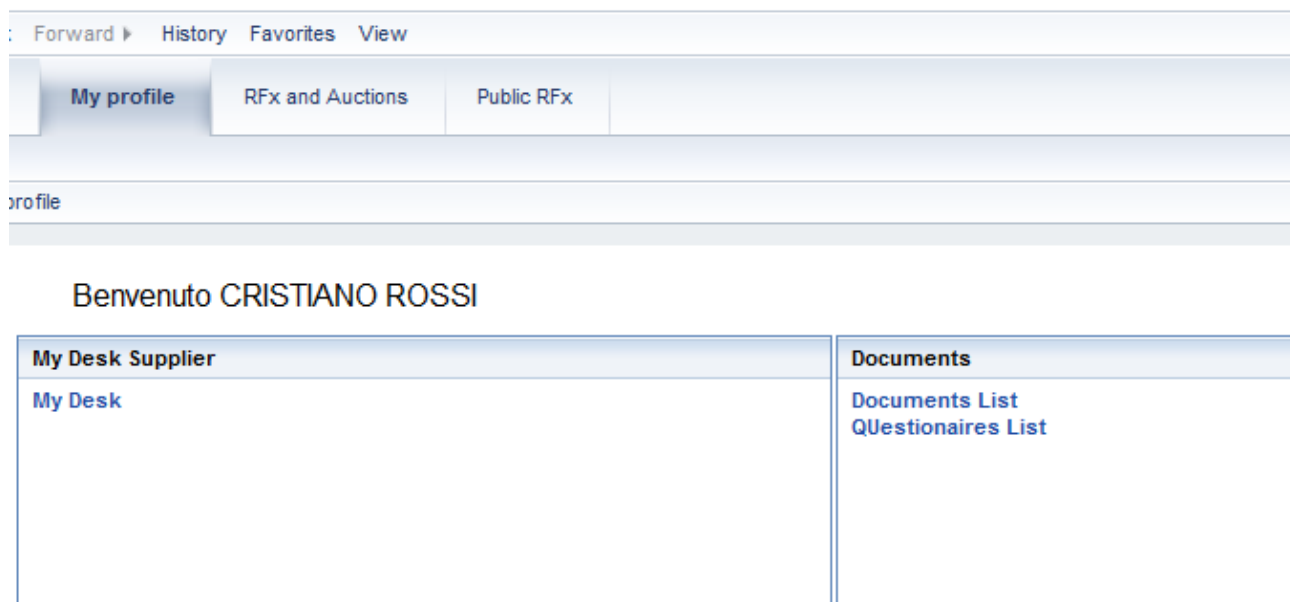


Figure 3– My Profile

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 Pre-qualification 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-Finmeccanica 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 (click on the relevant item Annex Questionnaires).

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

4. 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.

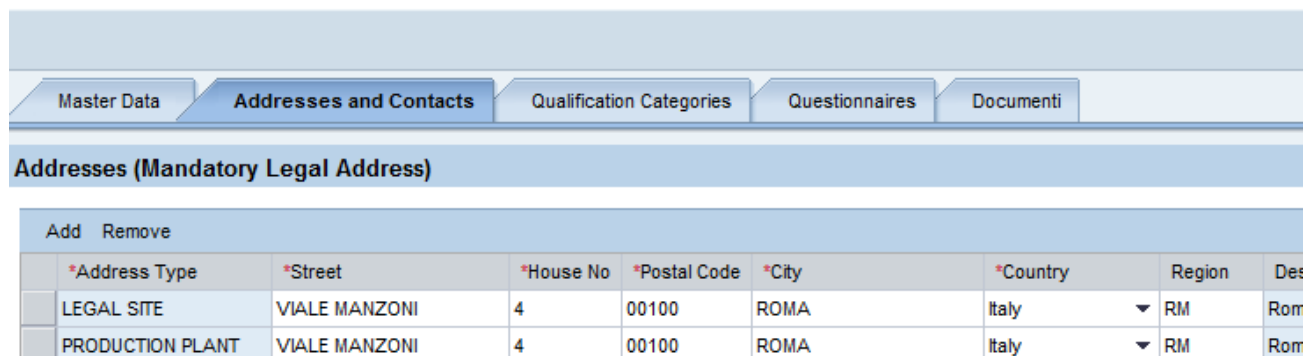
If a Pre-qualification process has already been launched for the supplier, the changes will be taken over by the Vendor Management, which after proper reflection, will update the record.

5. 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).



| *Address Type | *Street | *House No | *Postal Code | *City | *Country | Region | Des |
|------------------|---------------|-----------|--------------|-------|----------|--------|-----|
| LEGAL SITE | VIALE MANZONI | 4 | 00100 | ROMA | Italy | RM | Rom |
| PRODUCTION PLANT | VIALE MANZONI | 4 | 00100 | ROMA | Italy | RM | Rom |

Figure 4– 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.

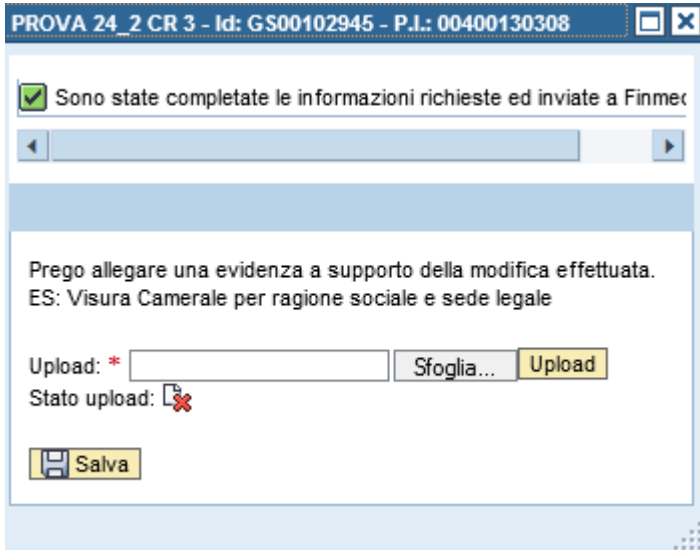


Figure 5– Self certification Attachment

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.

PROVA 24_2 CR 3 - Id: GS00102945 - P.I.: 00400130308

Salva  Elaborare | Visualizzare solam.

 Per il fornitore è stata creata la richiesta di anagrafica 000070000084

Sono state completate le informazioni richieste ed inviate a Finmeccanica

Dati Anagrafici | **Indirizzi e Contatti** | Categorie Merceologiche | Questionari | D

Indirizzi (Sede Legale Obbligatoria)

Aggiungere Rimuovere

| *Tipo di Indirizzo | *Via/P.za | *Numero Civico | *Codice Postale | *Ci |
|--------------------|---------------|----------------|-----------------|-----|
| SEDE LEGALE | VIA NAZIONALE | 6 | 00100 | ROI |
| SITO PRODUTTIVO | CORSO ITALIA | 9 | 00100 | ROI |

Figure 6- 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.

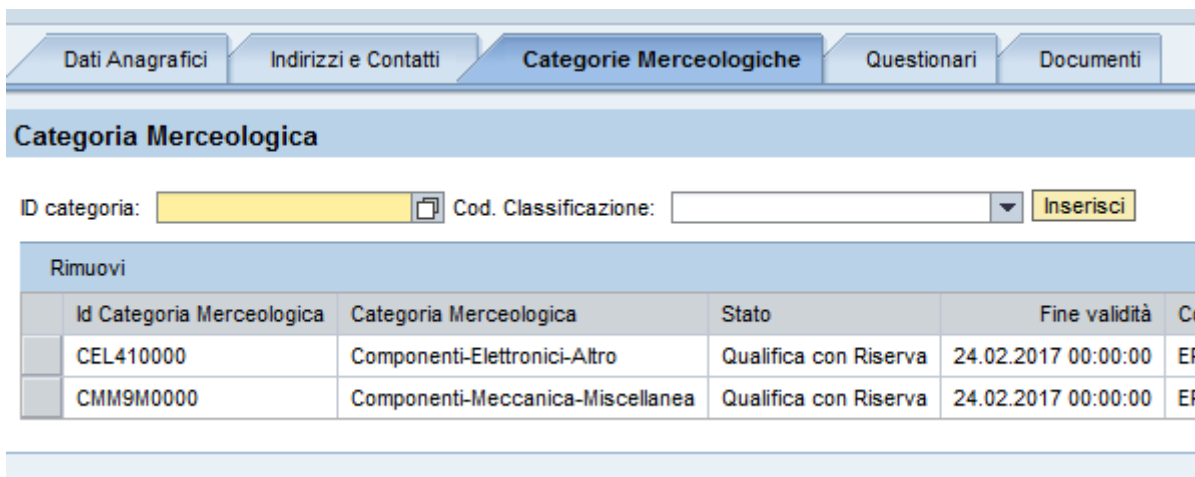
6. Qualification Categories

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:



| Rimuovi | | | | |
|---------------------------|----------------------------------|-----------------------|---------------------|----|
| Id Categoria Merceologica | Categoria Merceologica | Stato | Fine validità | Co |
| CEL410000 | Componenti-Elettronici-Altro | Qualifica con Riserva | 24.02.2017 00:00:00 | EF |
| CMM9M0000 | Componenti-Meccanica-Miscellanea | Qualifica con Riserva | 24.02.2017 00:00:00 | EF |

Figure 7– 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.

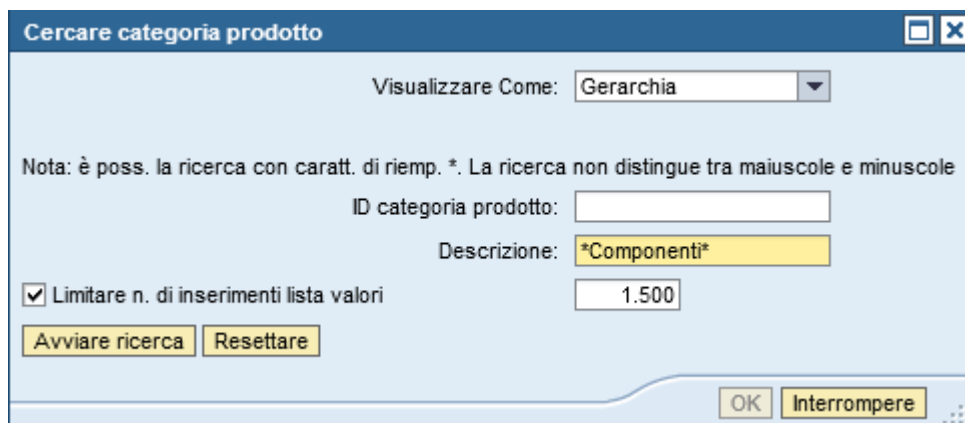


Figure 8– Selection of Qualification Categories

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

Cercare categoria prodotto

Visualizzare Come: Gerarchia

Nota: è poss. la ricerca con caratt. di riemp. *. La ricerca non distingue tra maiuscole e minuscole

ID categoria prodotto:

Descrizione:

Limitare n. di inserimenti lista valori

Dettaglio posizione 0 I dati non salvati andranno persi

[Esplosione Tutto](#) [Chiudere tutto](#)

| Descrizione | ID categoria prodotto |
|----------------------------------|-----------------------|
| ▼ ROOT | ROOT |
| ▼ Componenti | C00000000 |
| ▪ Componenti-Altro | C41000000 |
| ▼ Componenti-Decalcomania e s... | CDS000000 |
| ▼ Componenti-Decalcomania ... | CDS3U0000 |
| ▪ Componenti-Decalcoman... | CDS3U4100 |
| ▪ Componenti-Decalcoman... | CDS3UAL00 |
| ▪ Componenti-Decalcoman... | CDS3UB800 |
| ▪ Componenti-Decalcoman... | CDS3UC000 |
| ▼ Componenti-Decalcomania ... | CDS8E0000 |
| ▪ Componenti-Decalcoman... | CDS8E4100 |
| ▪ Componenti-Decalcoman... | CDS8EAL00 |
| ▪ Componenti-Decalcoman... | CDS8EB800 |
| ▪ Componenti-Decalcoman... | CDS8EC000 |
| ▼ Componenti-Decalcomania ... | CDS9J0000 |

Figure 9– 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.



Categoria Merceologica

ID categoria: Cod. Classificazione:

| Rimuovi | | | |
|---------------------------|--------------------------------|--|----------|
| Id Categoria Merceologica | Categoria Merceologica | | validità |
| CEL410000 | Componenti-Elettronici-Altro | | 0:00:00 |
| CMM9M0000 | Componenti-Meccanica-Miscellan | | 0:00:00 |

- EROGATORI SERVIZI
- SERVIZI COMMERCIALI
- PROFESSIONISTI
- REALIZZATORI DI OPERE
- RIPARATORE
- PRODUTTORE E DISTRIBUTORE
- PRODUTTORE E RIPATORE
- LAVORAZIONI A DISEGNO
- PROGETTAZIONE
- PROGETTAZIONE E PRODUZIONE

Figure 10– Classification

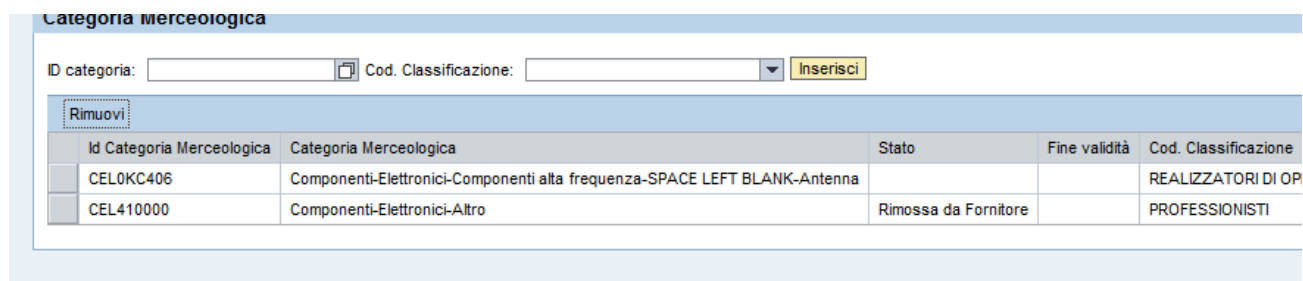
Now click on the Insert button to complete the insertion process for the new category.

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.



Categoria merceologica

ID categoria: Cod. Classificazione:

| Rimuovi | | | | |
|---------------------------|---|----------------------|---------------|----------------------|
| Id Categoria Merceologica | Categoria Merceologica | Stato | Fine validità | Cod. Classificazione |
| CEL0KC406 | Componenti-Elettronici-Componenti alta frequenza-SPACE LEFT BLANK-Antenna | | | REALIZZATORI DI OP |
| CEL410000 | Componenti-Elettronici-Altro | Rimossa da Fornitore | | PROFESSIONISTI |

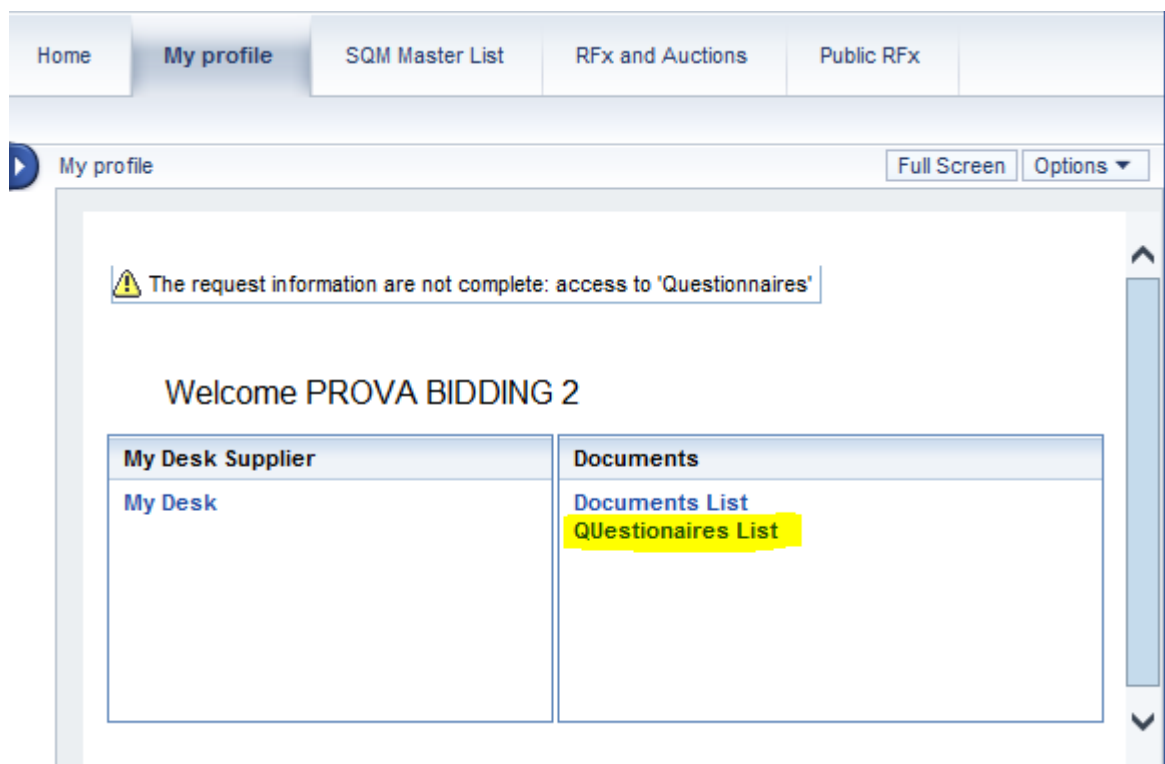
Figure 11– Category removing

In the Status field, where the removed category used to be, a notice will appear saying that the category has been removed by the supplier.

7. Questionnaires (How to answer a PreQualification/Qualification request)

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 Questionnaires List on MyProfile page (or in Questionnaires tab if you are in the the "My desk" page)



Follow the "Questionnaires dashboard":

| Aggiorna | | | | | | |
|----------|-------------------|---|---|-----|--------------|-------------------|
| | Area Questionario | Modello | Questionario | Led | ID categoria | Denom. categoria |
| ▼ | Qualifica | | | | | |
| ▶ | | QUALIFICA GENERALE (A1eA2) | | 🔴 | | |
| ▶ | | QUALIFICA PLANT (A8) | | 🔴 | | |
| ▶ | | PREQUALIFICA: Dati Economici | | ⚠️ | | |
| ▶ | | PREQ-Questionario EL | | ⚠️ | | |
| ▼ | Scouting | | | | | |
| ▼ | | Vendor Profile - General Company Data | | 🟢 | | |
| ▪ | | | Vendor Profile - General Company Data | 🟢 | | |
| ▶ | | Systems Power Sources APU (Auxiliary Power Unit) Power Unit | | 🟢 | CEL410000 | Componenti-Elettr |

Figure 12- 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 signal light column represents the status of the questionnaire:

- red signal light: the questionnaire has been published and is awaiting editing
- yellow signal light: the questionnaire has been edited and delivered properly, and awaits evaluation
- green signal light: the questionnaire has been evaluated.

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.

★ Risposta Obbligatoria

Vendor Profile - General Company Data

Vendor Profile - General Company Data

1. La vostra azienda e' una PMI (piccola e media impresa)?★

Selezionare una delle risposte sottostanti

No

Si

2. La vostra aziende possiede requisiti Etico/Legali/Ambientali?★

Selezionare una delle risposte sottostanti

No

Si

3. Compilare la seguente tabella inserendo i dati richiesti. è richiesto l'importo in euro. Nel caso di valori in valuta estera inserire i valor
 Nella riga anno inserire gli ultimi 3 anni per cui si dispone dei dati (es. 2015, 2014, 2013).
 Ove richiesto valori percentuali, inserire il valore 0-100 senza il simbolo "%"

| | *ANNO 1 | *ANNO 2 | *ANNO 3 |
|--|---------|---------|---------|
| ANNO | | | |
| CAPITALE SOCIALE | | | |
| FATTURATO | | | |
| QUOTA FATTURATO VS FNM IN % (SE GIA FORNITORE) | | | |
| SETTORE DIFESA IN % | | | |
| NUMERO STABILIMENTI | | | |

4. Nel caso di bilancio in valuta estera prego inserire la Valuta di Riferimento e il tasso di cambio rispetto all'euro utilizzato per la valoriz

Figure 13– 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.
- **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 14– 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 XLS:** this function allows one to export the Questionnaire in Excel format.
- **Print PDF:** this function allows one to export the Questionnaire in PDF format.

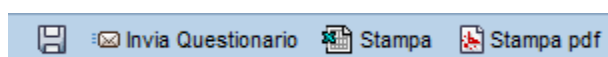
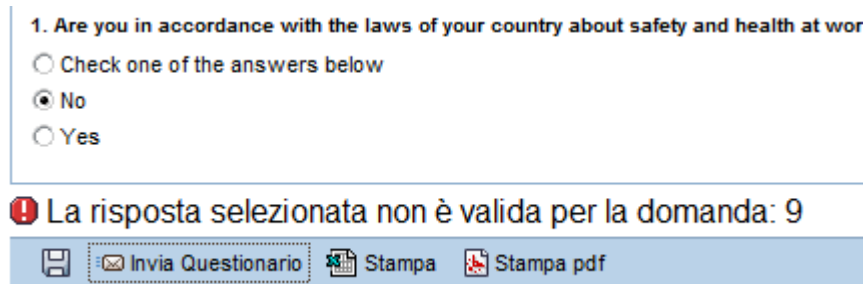


Figure 15– Questionnaires Tool Bar

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.



1. Are you in accordance with the laws of your country about safety and health at wor

Check one of the answers below

No

Yes

❗ La risposta selezionata non è valida per la domanda: 9

Figure 16– Questionnaires Error

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

8. Vendor Profile (Scouting Questionnaires)

When first entering after the self-registration process, the supplier may enter his personal area on the portal and complete the process for defining the Vendor Profile.

To do so, one must first make out the Scouting Questionnaires, a series of Questionnaires useful for establishing the supplier's profile in a detailed manner, both in general terms and in terms of the relevant Product Categories. At any time, if the system has published Questionnaires for the user, by clicking on Supplier Data the user can see, at the top of the page, an alert message notifying him.

PROVA 24_2 CR 3 - Id: GS00102945 - P.I.: 00400130308

Salva Elaborare | Visualizzare solam.

⚠ Non sono complete le informazioni richieste: accedere a 'Questionari'

Dati Anagrafici
Indirizzi e Contatti
Categorie Merceologiche
Questionari
Documenti

Dati fornitore

| | |
|--|--|
| Ragione Sociale: <input type="text" value="PROVA 24_2 CR 3"/> | Forma Giuridica: <input type="text" value="S.r.l."/> |
| Data inizio attività: <input type="text"/> | Nr. Iscr. camera di commercio: <input type="text"/> |
| Posta Elettronica Certificata: <input type="text" value="pec@pec.it"/> | |
| Stato Prequalifica: <input type="text" value="Qualifica con Riserva"/> | |
| Referenze: <input type="text"/> | Oggetto Sociale: <input type="text"/> |

Figure 17– Questionnaires Alert

By clicking on the Questionnaires tab one can now identify which forms must be made out.

9. Pre-qualification Requests

In order to be placed on the Leonardo-Finmeccanica 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-Finmeccanica 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.

Pre-qualification may be requested by the Buyer, and involves filling out a series of questionnaires to check the following requirements:

- Economic Financial Solidity: based on the Altman index.
- Ethical-Legal Checkup: one will be asked to describe and document compliance with current regulations.
- Dependence on Leonardo-Finmeccanica: turnover towards Leonardo-Finmeccanica must be less than 70% of overall turnover.

At the time the Buyer 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, and the Pre-qualification Status field (visible on the General Data tab) will be updated in one of the following possible states:

- **Pre-qualified:** the process has been successfully completed
- **Pre-qualified with Reserve:** the supplier is Pre-qualified, however the Central Pre-qualification Office reserves the possibility of further investigation on the basis of certain motivations specified in the notes.
- **Pre-qualified in Concession:** this kind of status is assigned only to a series of categories of suppliers definite in Leonardo-Finmeccanica directives.
- **Pre-qualification denied:** in case of negative outcome of the evaluation

The Pre-qualification status lasts 12 months, after which the supplier will be set in Expired Pre-qualification status.

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

10. Qualification Requests

For a supplier registered with the list, a Qualification Process must be opened at the time a contract is assigned.

In Leonardo-Finmeccanica'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.

The supplier may view his qualification status starting out from Product Categories.

In the example appearing on the image below, the supplier is qualified differently for different divisions on the same Product Category.

Dati Anagrafici
Indirizzi e Contatti
Categorie Merceologiche
Questionari
Documenti

Categoria Merceologica

ID categoria: Cod. Classificazione:

Rimuovi

| Id Categoria Merceologica | Categoria Merceologica | Stato | Fine validità | Cod. Classificazione |
|---------------------------|------------------------------|----------------|---------------------|----------------------|
| CEL410000 | Componenti-Elettronici-Altro | PreQualificato | 19.02.2017 00:00:00 | PROFESSIONISTI |
| CEL410000 | Componenti-Elettronici-Altro | Qualificato | 23.02.2019 00:00:00 | PROFESSIONISTI |
| CEL410000 | Componenti-Elettronici-Altro | Qualificato | 23.02.2019 00:00:00 | PROFESSIONISTI |

The duration of Qualification appears in the Expiry field.
 When Qualification expires, depending on the situation, a new Qualification Process may be launched.