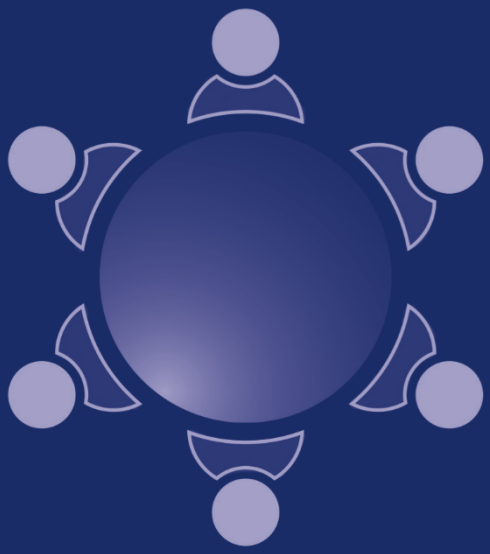
esa

# esa-star

# → REGISTRATION USER MANUAL



European Space Agency

# ESA-STAR REGISTRATION
# USER MANUAL

| | |
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# 1. INTRODUCTION

This document is the Software User Manual (SUM) for the esa-star Registration module.
The purpose of this document is to function as an explanatory manual for esa-star Registration users by providing the required guidelines and assistance to correctly use the system. It includes a detailed description of the operations performed in the esa-star Registration module.

## 1.1. Acronyms

This section contains the list of acronyms directly used in this document.

| Acronyms | Description |
|---|---|
| BU | Business Unit |
| BUIA | Business Unit Information Administrator |
| CO | Contracts Officer |
| ECM | Entity Capability Mapping |
| ECOS | ESA Costing Software |
| EIA | Entity Information Administrator |
| esa-p | ESA Procurement system |
| esa-star | ESA System for Tendering, Registration, Publication, Entity Capability Mapping and esa-match |
| ESA | European Space Agency |
| ET | e-Tendering |
| LE | Legal Entity |
| LSI | Large Systems Integrators |
| SME | Small and Medium Sized Enterprises. Reference to the SME definition. |
| TA | Tender Action |
| URL | Uniform Resource Locator |

*Table 1- Acronyms*

## 1.2. Document structure

This document is organised according to the following structure:

Chapter 1 ‘Introduction’: contains the purpose and the scope of the document.
Chapter 2 ‘General esa-star Registration Concepts’: contains the general concept of the application and the procedures to follow to use the esa-star registration system.

# 2. GENERAL ESA-STAR REGISTRATION CONCEPTS

The esa-star Registration Solution is the ESA Corporate Application supporting the following processes:

- Registration of Legal Entities in the ESA corporate systems for tendering, purchase and financial tasks
- Collection and regular update of data provided by the registered entities used by ESA procurement, industrial policy and finance processes
- Registration and maintenance of entities' user information, to grant them access to the esa-star Registration, esa-star Publication, esa-star Tendering, esa-match, esa-star ECM and esa-p systems.

New functionalities implemented are totally integrated within the ESA Corporate Information System architecture.

## 2.1. System Overview and Users

The esa-star Registration System is made up of the two principal components:

1. esa-star Registration Public Web Site: this application allows registration of a new entity in the ESA corporate systems for tendering, purchase and financial tasks.
2. esa-star Registration Internal Web Site: this application allows updating of entity information as required and maintenance of entities' user account information, i.e. in order to grant entity users access to the esa-star Tendering, esa-star Publication, esa-match, ECM and esa-p systems.

The esa-star Registration users are the following:

| Role | Type | Description |
|---|---|---|
| **Entity Validator** | ESA | ESA authority responsible for first registration approval. Approves questionnaires updated by entities and if needed directly updates questionnaires. |
| **Financial Vendor Master Data Responsible** | ESA | ESA authority for entity financial matters. Reviews and approves entity banking details to trigger bank account transfer to esa-p, and manages accounting data for entities. |

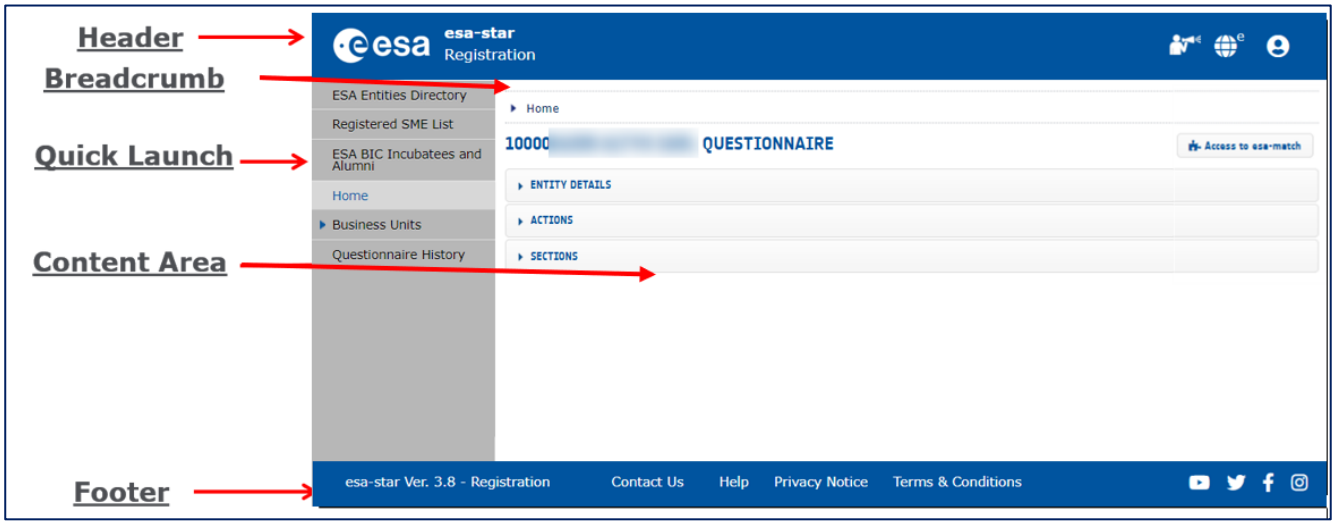
| | | |
|---|---|---|
| **CSR Reviewer** | ESA | ESA authority who accesses and updates the information available in the CSR Section. |
| **Guest** | N/A | Can view the data in the public entities directory and request the registration of her/his own entity and/or business unit. |
| **Entity Information Administrator** | Legal Entity | The Entity Information Administrator is responsible for:<br>• the information collected from the users under their own entity<br>• creating and maintaining the entity data<br>• submitting the questionnaire to ESA<br>• accessing published Entity information<br>• updating or requesting user ids and contact points for the entity staff and defining their role<br>• providing the identity certification for every user ID<br>• submitting the request to obtain the External Entity attribute (see par. 2.9)<br>• requesting ESA to freeze his/her Entity<br>• authorising creation of business units for the legal entity replying to an ESA Interact item for which their own Entity meets the restriction requirements in esa-star Publication.<br>• managing CSR section |
| **Business Unit Information Administrator** | Business Unit | Once granted access by the EIA, has the same authorisations as the EIA in the context of the relevant business unit. |
| **Entity Information Administrator Deputy** | Legal Entity | The Entity Information Administrator Deputy has the same authorisations as the Entity Information Administrator. |
| **Entity User** | Entity (Legal or BU) | Authorised to:<br>• view the published Entity Information (except for financial figures and entity structure) in esa-star Registration,<br>• view tender action information in esa-star Publication,<br>• find business partners in esa-match and view their entity details, including the list of competences and products,<br>• view harmonisation outcomes in esa-star ECM. |
| **Bid Manager** | Entity (Legal or BU) | Authorised to:<br>• view the published Entity Information (except for financial figures and entity structure) in esa-star Registration,<br>• request the creation of a Bidder Restricted Area in esa-star Tendering and submit offers,<br>• view and express interest in Tender Actions view and download tender documentation depending on the entity status and access rights in esa-star Publication,<br>• reply to an ESA Interact item for which their own Entity meets the restriction requirements in esa-star Publication. |
| **Contract Manager** | Entity (Legal or BU) | Authorised to:<br>• submit contract change proposals in esa-star Tendering. |

| | | |
|---|---|---|
| | | • view the published Entity Information except for financial figures and entity structure in esa-star Registration.<br>• reply to an ESA Interact item for which their own Entity meets the restriction requirements in esa-star Publication.<br>• fill in the Contract Closure Documentation and submit it to ESA stakeholders for approval in esa-star CCD |
| **Bank Details Administrator** | Legal Entity | Entity Contact Point for financial and payment matters: has read access to the entity's data and can edit bank details information. Can view the published Entity Information except for financial figures and entity structure. |
| **esa-p Entity User** | Legal Entity | Entity user authorised to access esa-p and allowed to post confirmations and invoices on entity contracts. S/he can be assigned only if the entity has Valid Full status. Please note that access will be active after 10:00 on the day following profile creation or role assignment and the corresponding identity certification. |
| **ECOS Responsible** | Legal Entity | Entity Contact Point for ECOS matters. |
| **Entity Tender Administrator** | External Entity | S/he is the person authorised to publish External Entity tenders (non-ESA TAs) in esa-star Publication for the entity concerned (see par. 2.9). |
| **esa-match Responsible** | Entity (Legal or BU) | Entity user responsible for:<br>• managing the entity profile and information,<br>• nominating one or more esa-match Conversation Managers in the esa-match application,<br>• managing the conversations in the Lounge Area,<br>• replying to ESA Communications,<br>• managing entity Ads and related messages / conversations in the Marketspace. |
| **esa-match Conversation manager** | Entity (Legal or BU) | Role managed and assigned directly in the esa-match application by the esa-match Responsible (as a prerequisite, the esa-match Conversation Manager must be an entity user previously registered in esa-star Registration). In esa-match s/he can:<br>• manage conversations in the Lounge Area,<br>• manage the entity's Ads and related messages / conversations in the Marketspace,<br>• reply to ESA Communications. |
| **Entity Capabilities Responsible** | | Entity user responsible for the management of the entity capabilities in esa-star ECM. Can accept harmonisation outcomes and manage entity contact points on esa-star ECM. Can only access the data of their own entity. |
| **TPS User** | Legal Entity | Authorised to:<br>• view the published Entity Information (except for financial figures and entity structure) in esa-star Registration. |
| **ESA BIC Manager** | Legal Entity | Entity user responsible for the management of the Legal Entity Incubatees related to the Entity Incubator.<br>Authorised to:<br>• view the Legal Entity questionnaires and Business Units related in read-only mode in esa-star Registration. |
| **Rates Responsible** | Entity (Legal or BU) | Entity user responsible for the approval or rejection of the Rates Forms in esa-star ASTRA. |

| | | |
|---|---|---|
| **Claims Responsible** | Entity (Legal Entity or BU) | Entity user responsible for the management of the Claims process. |

The esa-star Registration user interface comprises the following components:

- The **Header** contains:
  - On the left, the ESA logo and the full application name
  - On the right, a world icon which links to the “Doing Business with ESA” portal, giving access to all relevant applications and esa-star modules. There is also a clickable user card icon that shows the full name of the logged-in user and the log-out button
- The **Breadcrumb** shows where the user is in the site hierarchy and facilitates navigation of the different levels in the hierarchy tree
- The **Quick Launch** menu contains entries related to the esa-star functions
- The **Content Area** shows the content of the different functions assigned to the user
- The **Footer** contains the esa-star system version, and links to Contact Us, Help, Terms & Conditions of esa-star, the Privacy Notice (only for Entity Users) and ESA’s social media accounts.

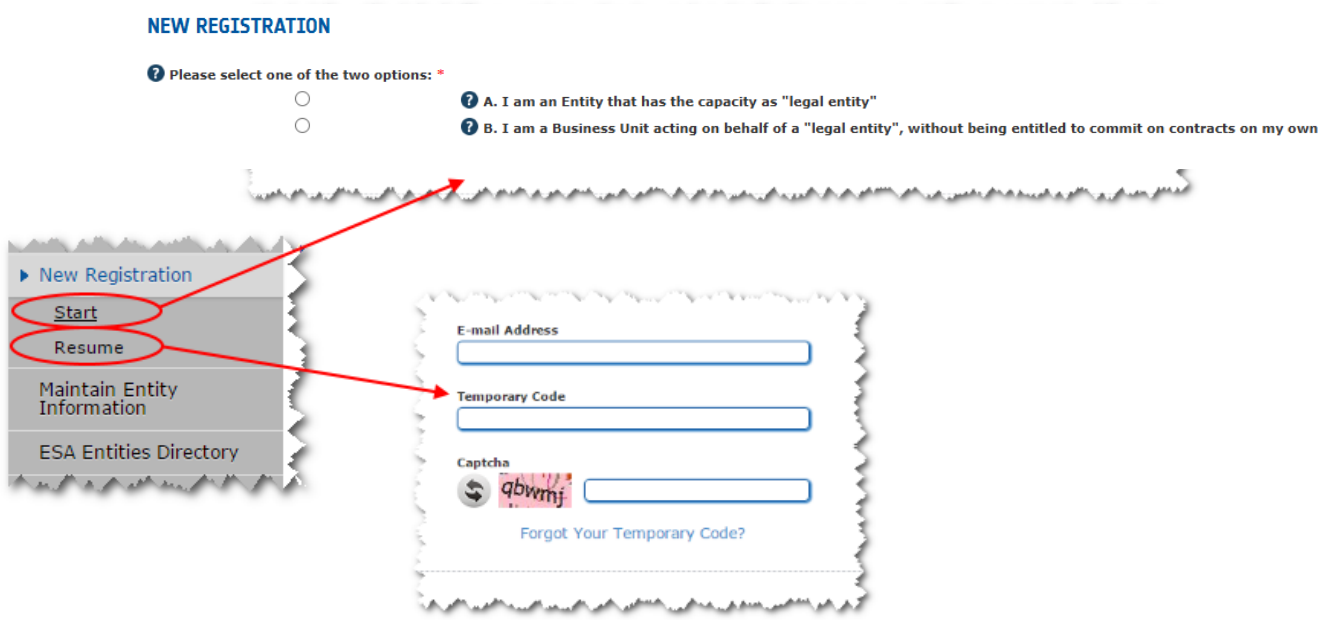



## 2.2. New Registration

You can access the esa-star Registration Public Website at the following URL:

https://esastar-emr.sso.esa.int/

esa-star Registration is not compatible with Internet Explorer and all versions of EDGE prior to 79.0.309. To get the best experience using esa-star Registration, please use a more modern browser (i.e. EDGE-Chromium, Chrome or Firefox).



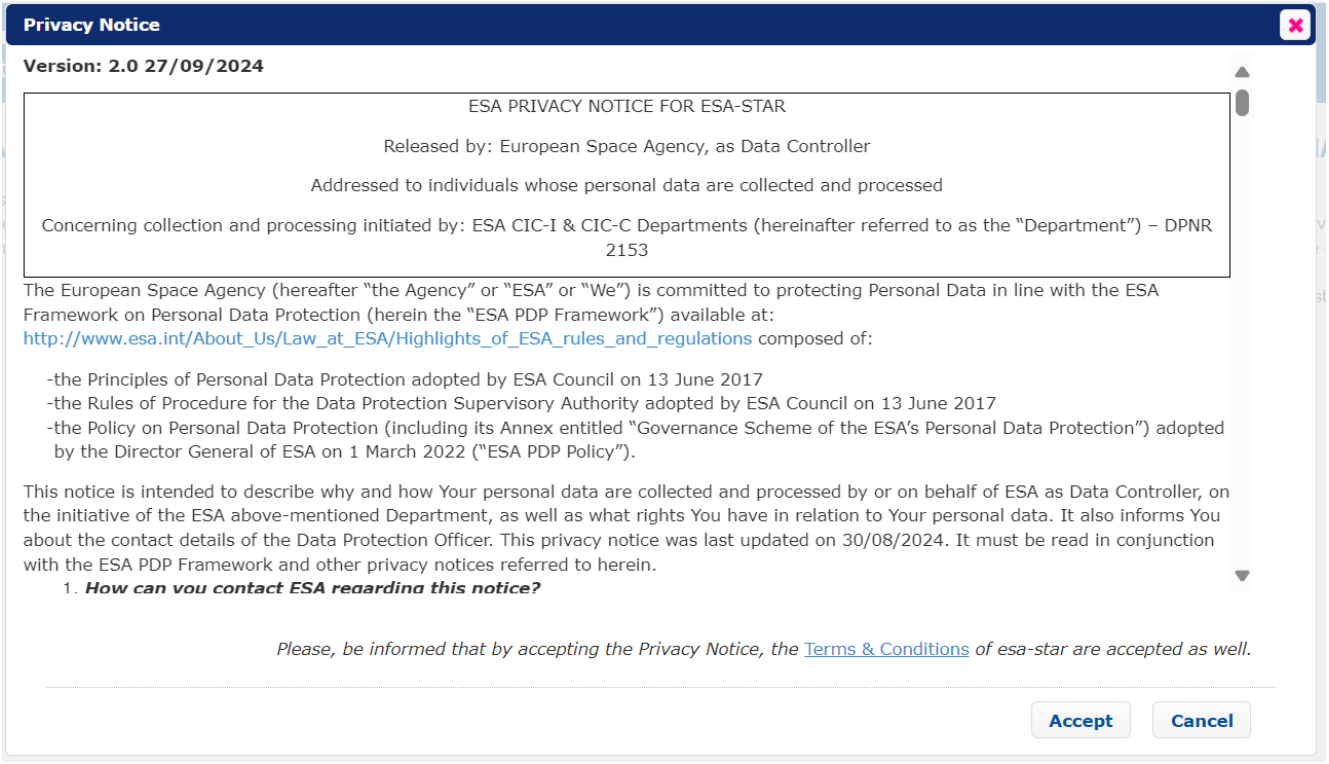

The '*New Registration*' menu contains two links:

- '*Start*'
- '*Resume*'

You need to click on '*Start*' if either of the following apply:

- You are accessing the esa-star system for the first time, and you wish to register a legal entity as a potential tenderer
- You wish to register a new business unit which is part of a legal entity already registered in the system.

If you click on ‘Start’, the following Private Notice pop-up appears:




To continue with the registration, you need to accept the conditions of the notice by clicking on ‘Accept’. If the button is not clicked or the page is closed, the new registration or log-in will be cancelled.

You need to click on ‘*Resume*’ if you wish to resume a suspended registration process. To do this, the Entity Information Administrator (EIA) needs to log in using:

- The email address used during registration
- The temporary code received via email
- The captcha shown on the ‘*Resume*’ screen.

If the EIA does not remember the temporary code, it can be regenerated by inserting the email and the captcha, and then clicking on the ‘*Forgot Your Temporary Code?*’ link. The system will send an email with a new temporary code to the EIA.

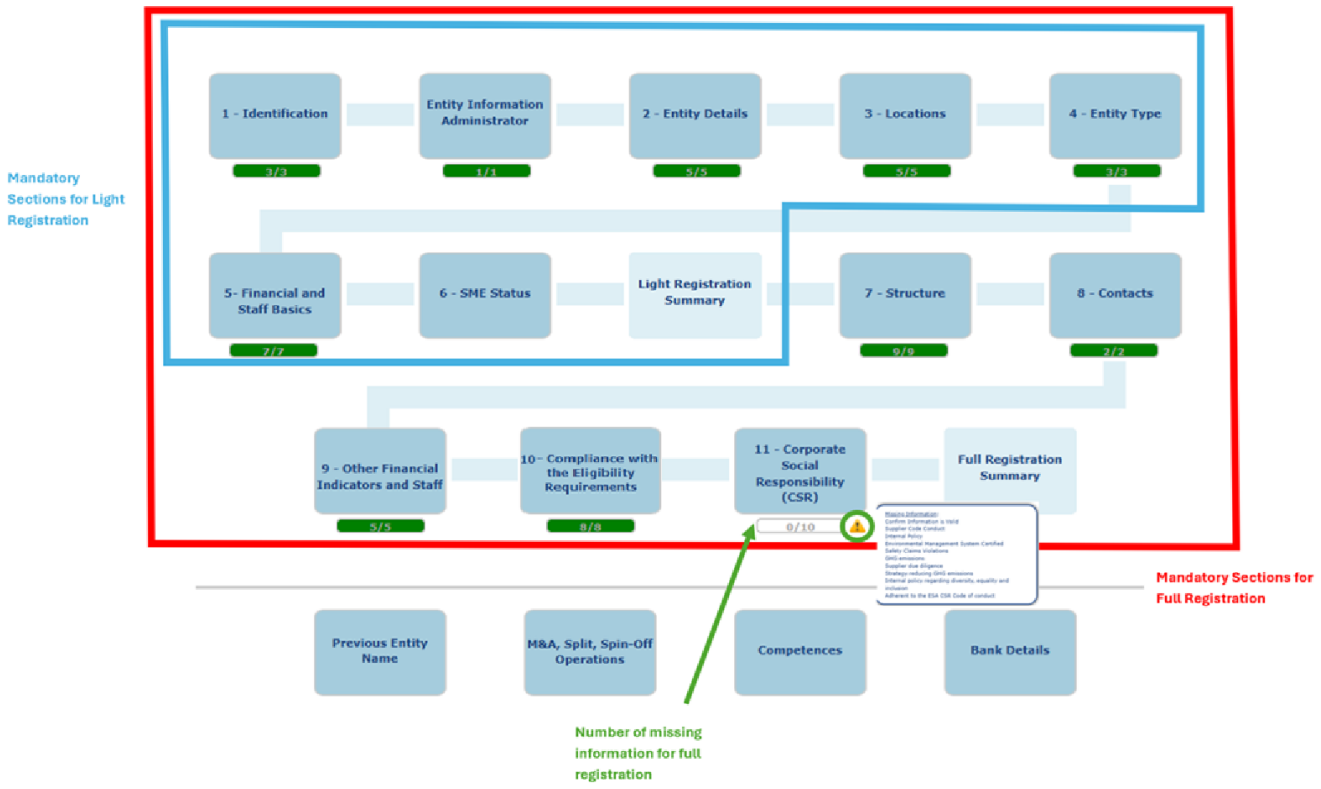
## 2.3. How to register a new Legal Entity

A Legal Entity is any physical or legal person or public entity or group of persons and/or bodies which offers on the market, respectively, the delivery of supplies, products or services and which satisfies the eligibility criteria specified in Article 12 of the ESA Contracting Regulations and therefore is eligible to submit proposals to ESA.

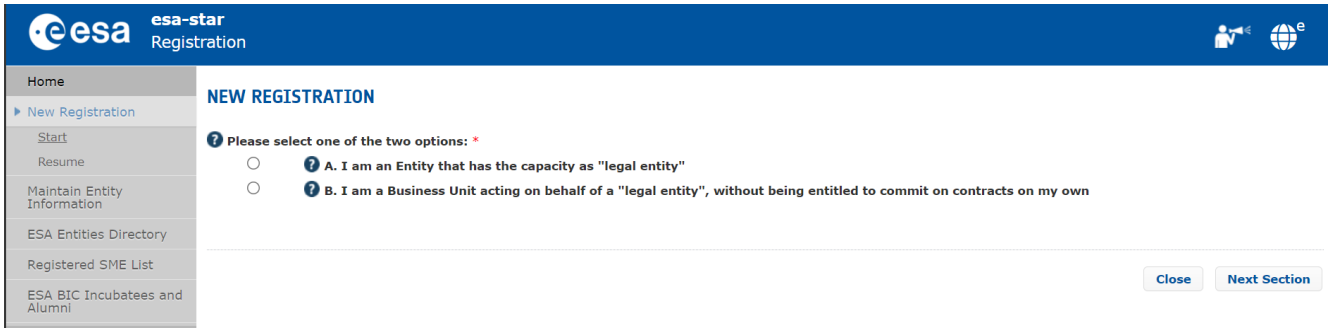
If you identify yourself with this definition, you can register your legal entity in the esa-star system.

The registration process is organised as a wizard that guides the user step by step through the filling out of the questionnaire sections. Based on the information you provide during the registration process; the registration may be *Light* or *Full*.

The following image shows what information to provide for both a *Light Registration* and *Full Registration*.



The first step of registration is to verify that the LE is not already registered. This check is necessary because an entity should not be registered more than once in the system.
In the ESA Entities Directory is possible to find Entities that have updated the Name also before the Questionnaire's validation, therefore you can find the name of Entities updated.




When the legal entity already exists in the esa-star, there may be three cases:

1. The Legal Entity has a valid status: the user cannot register the LE but can register a related Business Unit. In this case it is recommended to contact the corresponding EIA.
2. The Legal Entity is already in the registration process: the system suggests that you resume a previous registration (if you are the EIA)
3. The Legal Entity is obsolete: the system suggests that you contact the helpdesk.

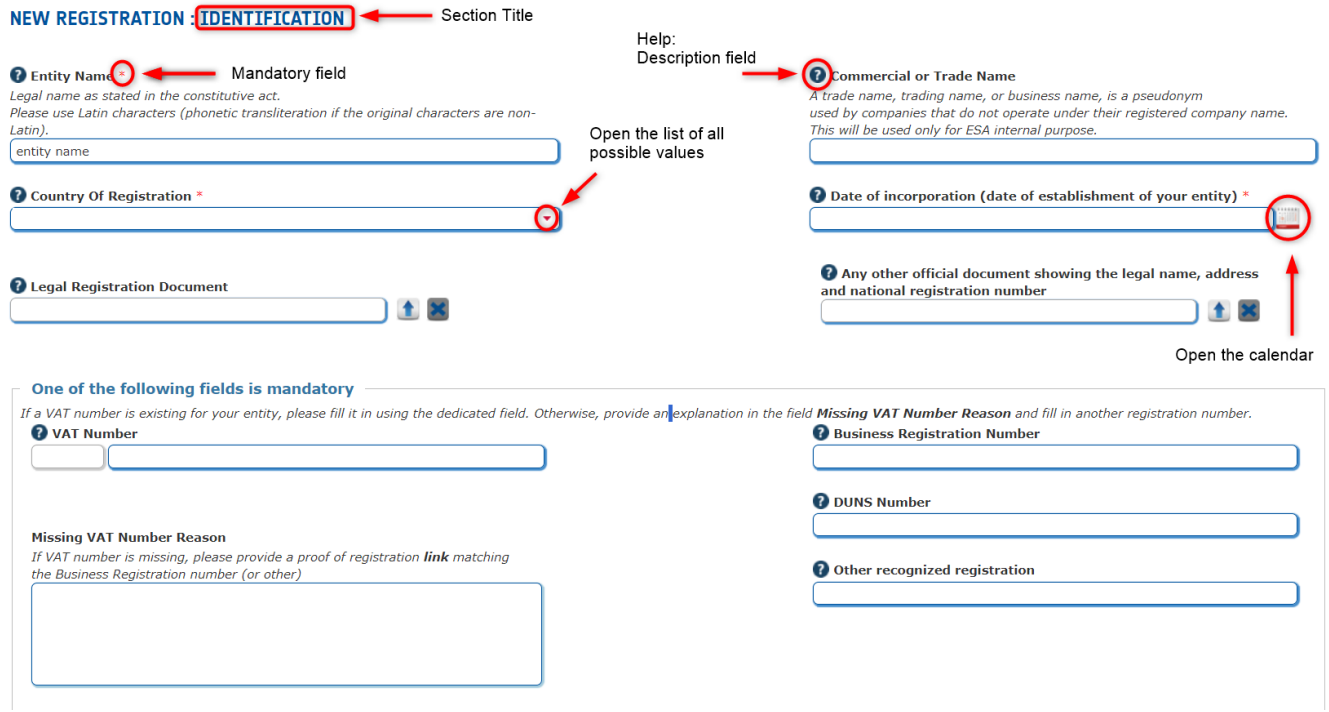
The table below summarises all statuses of an entity and the actions on related systems.

| Entity Status | esa-star Registration Tendering | esa-star Publication | esa-p | esa-match | ECM |
|---|---|---|---|---|---|
| **Guest** | The entity has not yet been registered for ESA, its data is in the temporary staging area of the esa-star system, waiting to be completed and submitted by the entity or approved by ESA. | The entity can access only the public part of the system. | The entity cannot access the system. | The entity has no profile in esa-match. | The entity is not added in the system. |
| **Valid Partial** | The light registration process is completed. Authorised users of the entity can update and submit the questionnaire. The entity bid managers can submit offers in esa-star. | Authorised users of the entity can access Tenders information, express interest and reply to ESA Interacts items. | The entity cannot be awarded with a contract as prime in esa-p. | The entity profile is automatically created in esa-match for entities entitled to have it. The access to the protected component is automatically granted to all users available in esa-star registration. | All entity users available in esa-star registration can view their entity details, including the list of competences and products. |

| Entity Status | esa-star Registration Tendering | esa-star Publication | esa-p | esa-match | ECM |
|---|---|---|---|---|---|
| **Valid Full** | The full registration process is completed. Authorised users of the entity can update and submit the questionnaire. The entity bid managers can submit offers in esa-star. | Authorised users of the entity can access Tenders information, express interest and reply to ESA Interacts items. | The entity can be awarded with a contract as prime in esa-p. | The entity profile is automatically created in esa-match for entities entitled to have it. The access to the protected component is automatically granted to all users available in esa-star registration. | All entity users available in esa-star registration can view their entity details, including the list of competences and products. |
| **To be updated** | Authorised users of the entity are required to update and re-submit the questionnaire on an annual basis. The entity bid managers can submit offers in esa-star. | Authorised users of the entity can access Tenders information, express interest and reply to ESA Interacts items. | The entity cannot be awarded with a contract as prime in esa-p | The entity profile is automatically created in esa-match for entities entitled to have it. The access to the protected component is automatically granted to all users available in esa-star registration. | All entity users available in esa-star registration can view their entity details, including the list of competences and products. |
| **Blocked** | All access to the esa-star system by entity users is disabled. | All access to the Publication system by entity users and by its own business units' users is disabled. | The entity's status is set to "Not Valid" in esa-p, but there will be no impact on the on-going contracts. | All the Entity related information available in esa-match will be no longer visible. Access to the esa-match protected component (if granted) is immediately revoked to all entity's users. Also, all its own business units' users' access is revoked. | The entity cannot be part of new harmonisation cycles. Access to the ECM system for entity users is disabled. |
| **Obsolete** | All access to the esa-star system by entity users is disabled. | All access to the Publication system by entity users is disabled. | The entity's status is set to "Not Valid" in esa-p, but there will be no impact on the on-going contracts. | All the Entity related information available in esa-match will be no longer visible. Access to the esa-match protected component (if granted) is immediately revoked to all entity's users. Also all its own business units' users' access is revoked. | The entity cannot be part of new harmonisation cycles. Access to the ECM system for entity users is disabled. |
| **Revoked (applicable at Business Unit level only)** | All access to the esa-star system by business unit users is disabled. | All access to the Publication system by entity users is disabled. | The business unit status is set to "Revoked" in esa-p, but there will be no impact on the on-going contracts. | All the Business Unit related information available in esa-match will be no longer visible. Access to the esa-match protected component (if granted) is immediately revoked | The BU cannot be part of new harmonisation cycles. Access to the ECM system for entity users is disabled. |

| Entity Status | esa-star Registration Tendering | esa-star Publication | esa-p | esa-match | ECM |
|---|---|---|---|---|---|
| | | | | to all Business Unit's users. | |

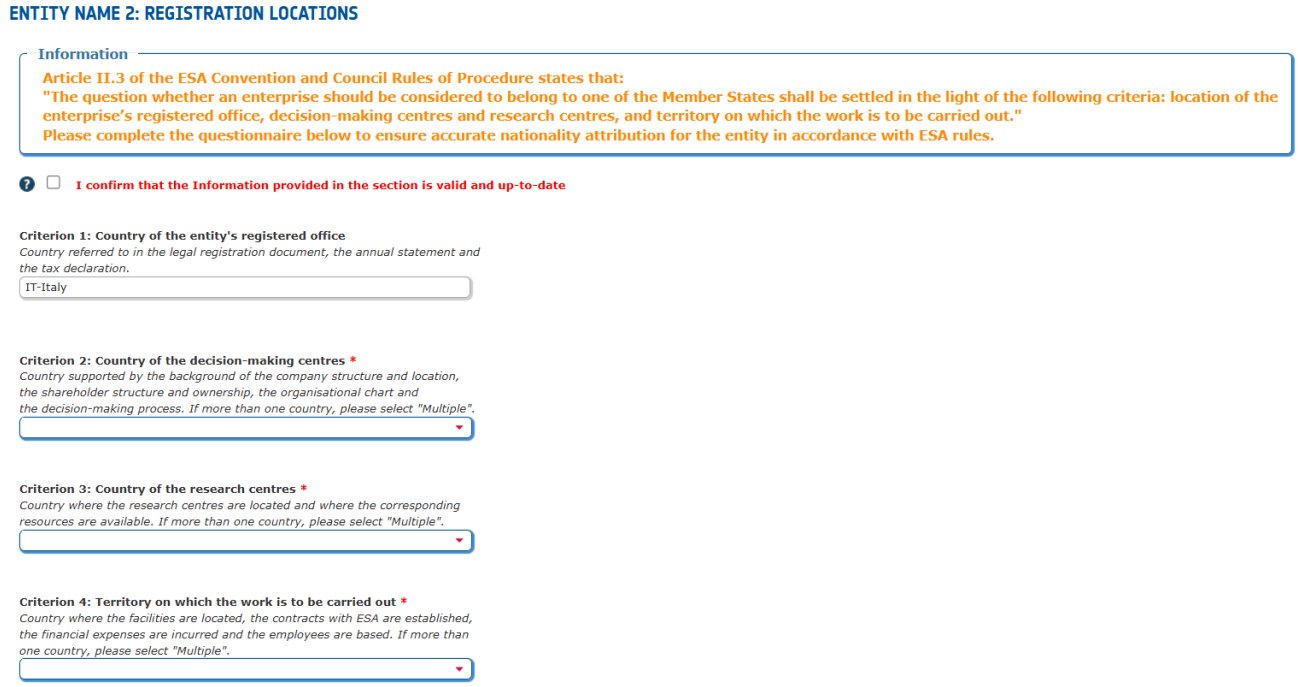
If your LE does not exist in the esa-star system, you can proceed with the registration wizard, which will show the first section of the questionnaire, the identification section.




To get the temporary code for resuming the registration, you need to enter information about entity identification and EIA contact: the temporary code will be sent to the EIA's email.

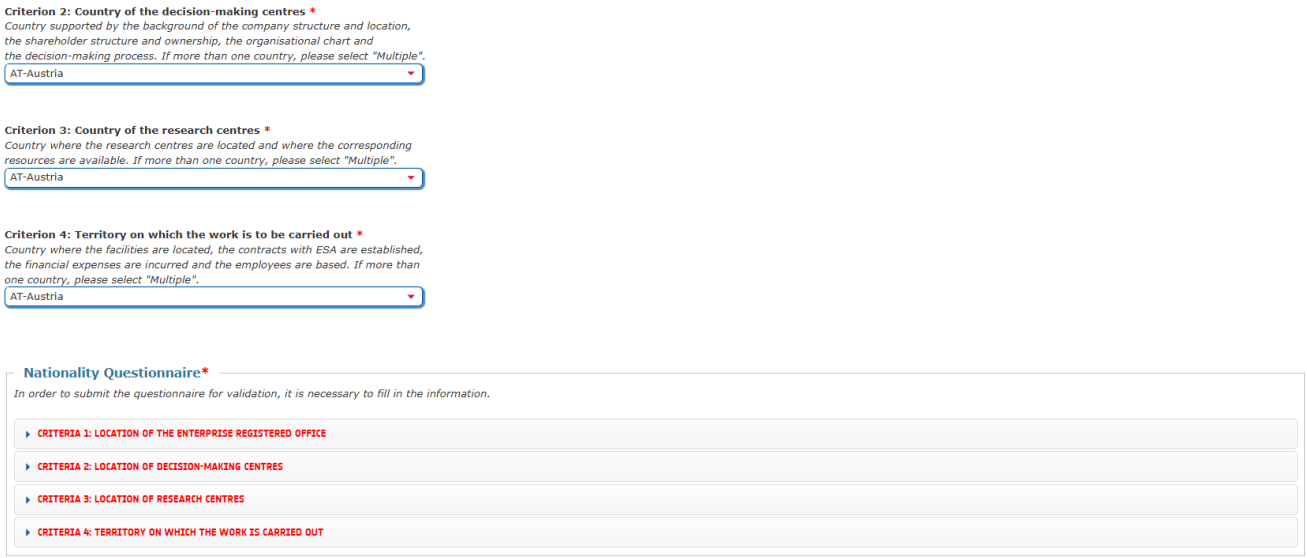
The sections that you need to enter for Light Registration are:

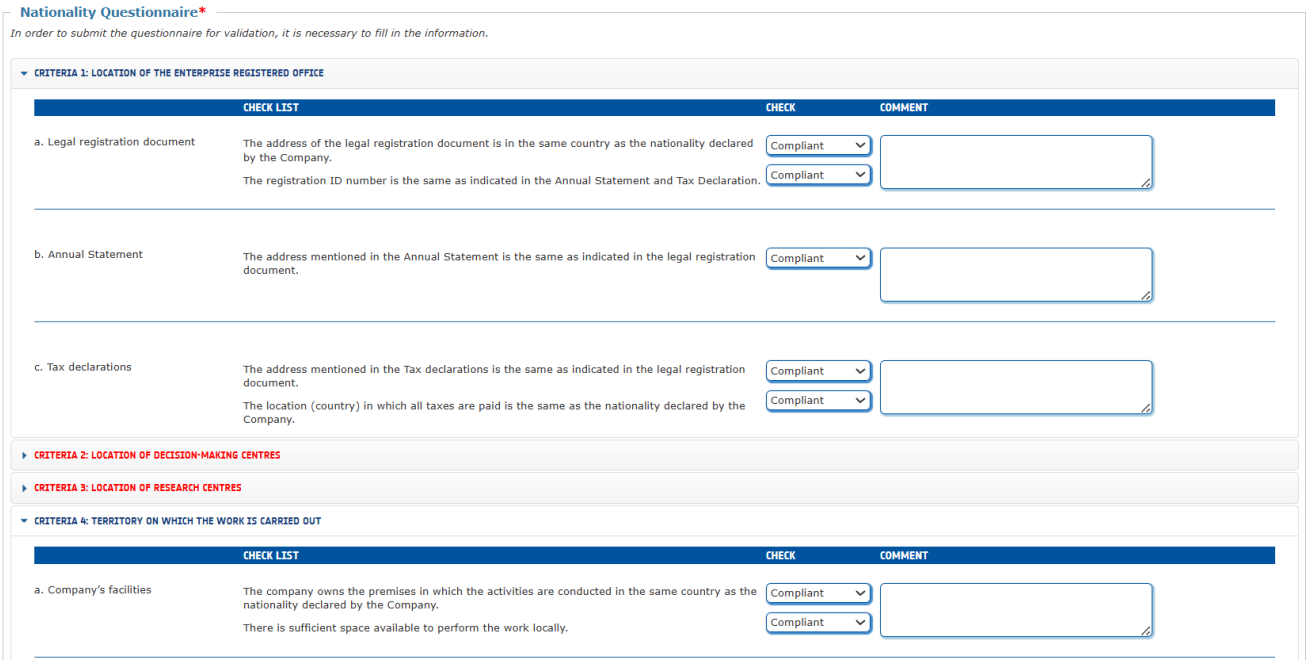
- Entity Details: description, address, email (*the email address will be visible publicly in the ESA Entities Directory to Registered entities. It is recommended to use a generic or anonymous email address such as info@company.com, rather than a personal address)*.
- Locations: specifies all locations of the LE.



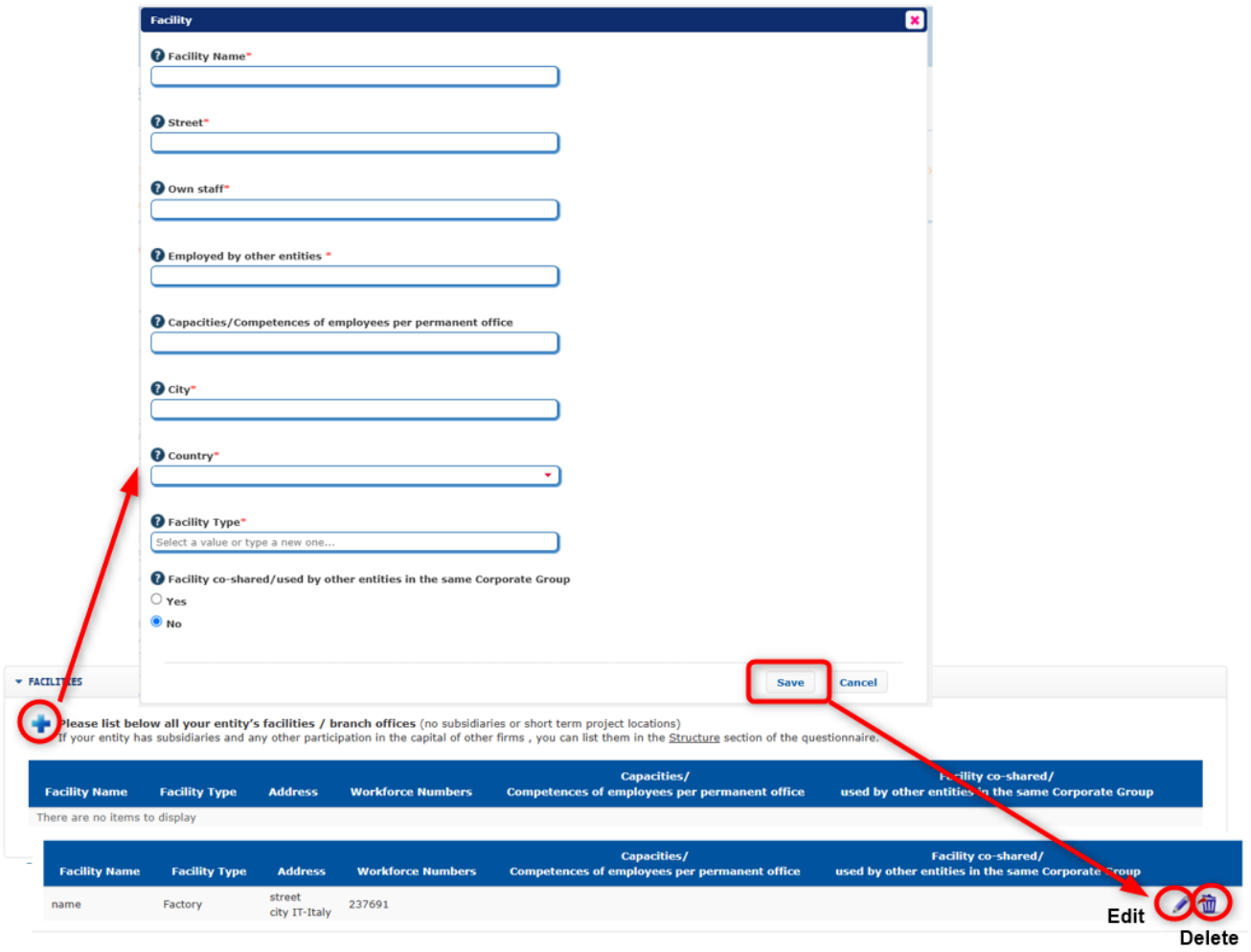

A new process for the Nationality attribution is available to better comply with the ESA convention: a self-assessment questionnaire is part of the Legal Entity registration process in esa-star, mandatory for both Light and Full Registrations.

Once the Criteria 2, 3 and 4 are filled in, the Nationality Questionnaire will appear.

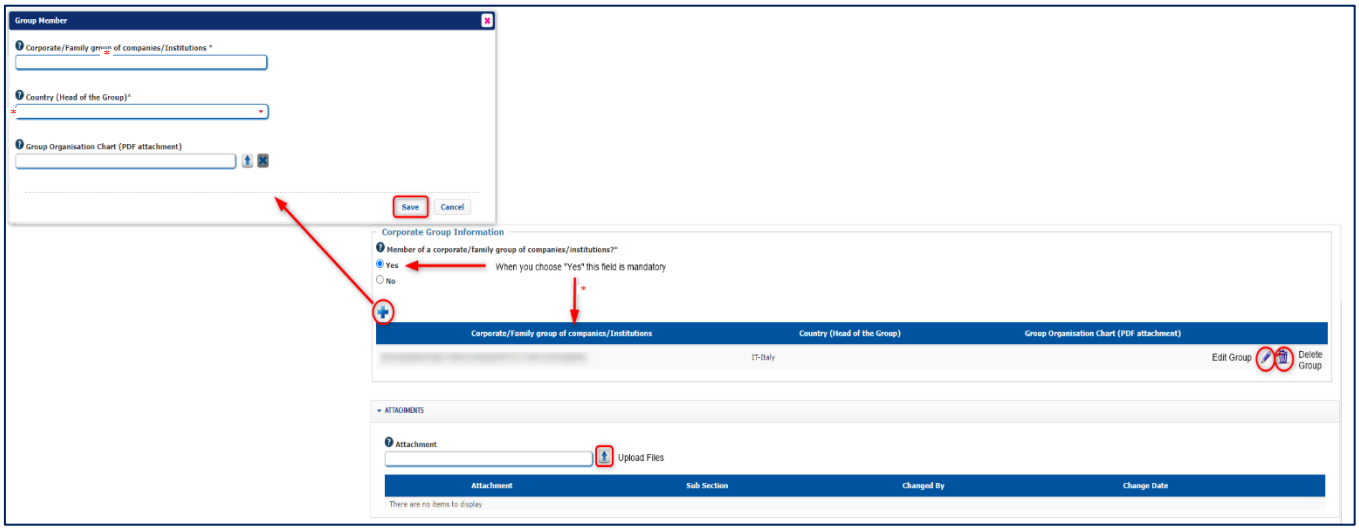





In this section, it is possible to add facilities by clicking on the '+' icon and filling in the data in the pop-up.




Further information can be added by selecting the option “Yes” for the question *“Member of a corporate/family group of companies/institutions?*” Additional information about the Group can then be provided, and files can also be added in the Attachments section.



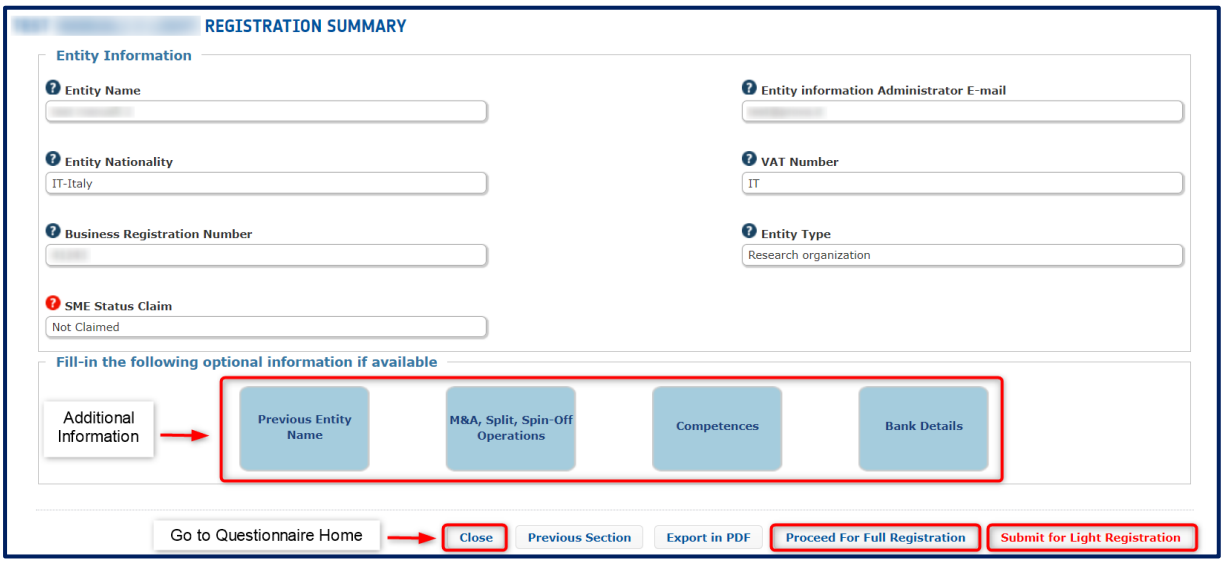

- Entity Type: defines the type of legal person (Private or Public) and the entity category (Profit or Non-Profit). Based on the selected values, it is possible to select a different entity type (company, research organisation, international organisation, governmental organisation.)
- Financial and Staff Basics: defines the end of accounting period for the entity and the financial data for the last two years.

  Financial data for the last two years are mandatory according to:

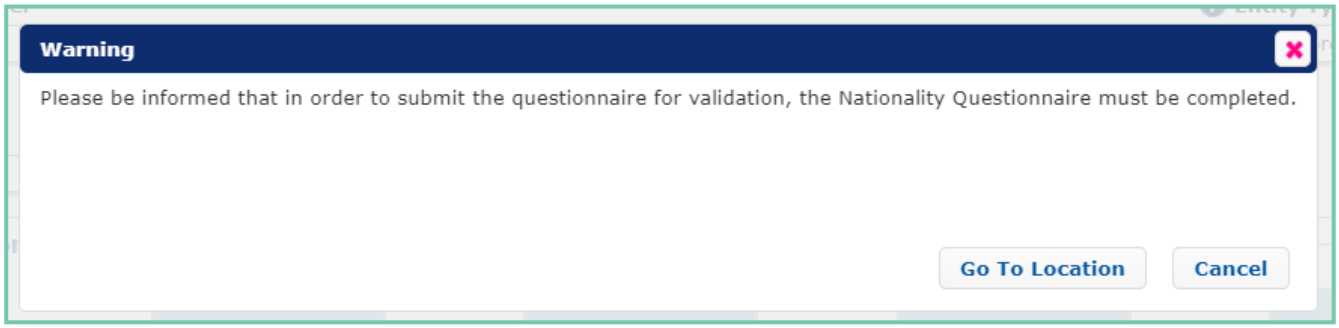
  1. Entity Registration Date
  2. End of accounting period

  In this phase of registration, if you are not in possession of the information, you can declare that now you don't have this information and you commit to provide it as soon as possible.

When the last section is filled-in for Light Registration, an information summary is displayed, and you can decide to submit the questionnaire for approval by ESA or proceed with full registration.



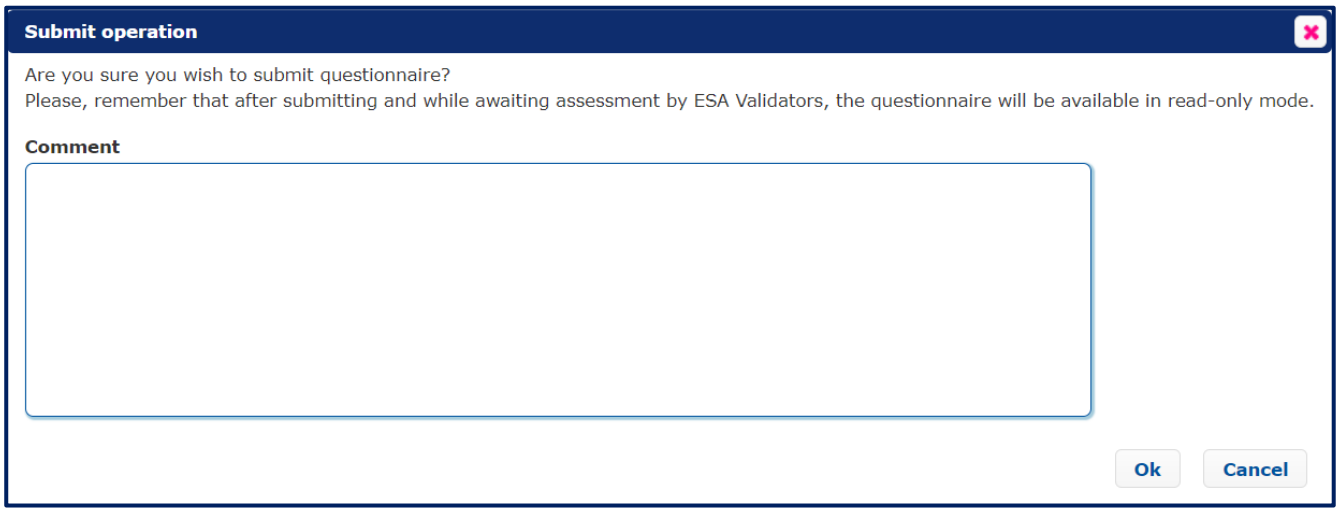

To submit the questionnaire for Light Registration, the Nationality Questionnaire must be completed. If not, the following pop-up is displayed:




On this page, you can also enter the following additional information for your entity:

- Previous Entity Name: defines the list of all the previous entity names (if they exist). You can fill in a new value or you have the possibility to select as Previous Entity Name the Entity Name of an already registered Legal Entity.
- Merge & acquisition, split and spin-off: allows you to specify if the entity has been involved in any operations of merge, acquisition, split or spin-off with other entities.
- Competences: allows you to specify the products, technologies and activities of your entity.
- Bank Details: allows you to specify the bank accounts for your entity. For further details, see below.

If you decide to submit the questionnaire, the request for approval is sent by email to the Entity Validator and your questionnaire becomes accessible only in read mode.




The Entity Validator can:

- Approve your registration: you will receive an email with the credentials for accessing the esa-star Registration Internal Application through the following link:

  https://esastar-em.sso.esa.int

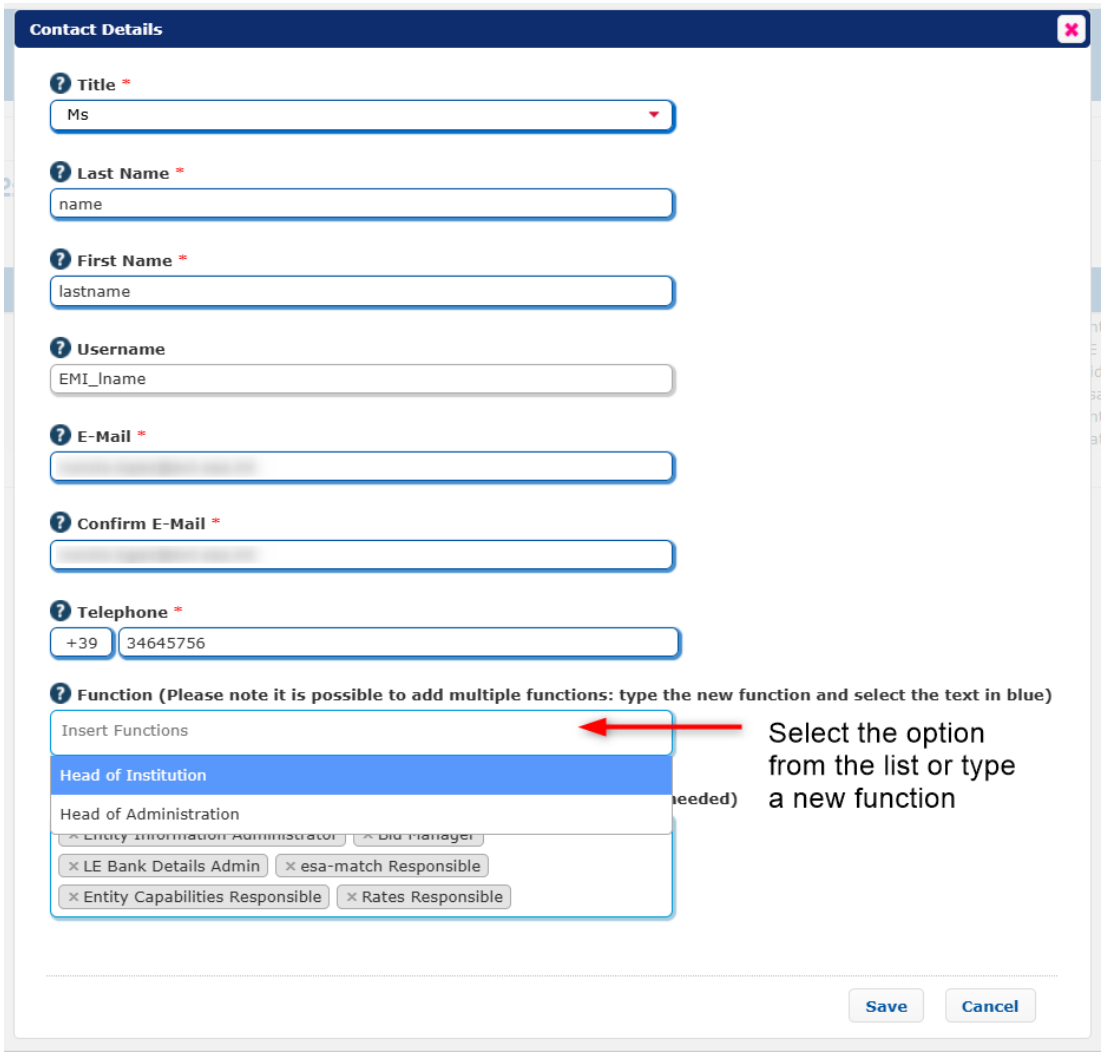
  You will be automatically assigned the Entity Information Administrator role.
  If the nationality of your entity is in an ESA Member State, EU Country, Associate Member State or Cooperating State, you will also be automatically assigned the roles of esa-match Responsible and Entity Capabilities Responsible. You will receive an email with the relevant information for accessing esa-match and ECM, along with how to manage your entity profile information and visibility.
- Furthermore, as soon as the registration is approved, the role of Rates Responsible will be automatically assigned to the Entity Information Administrator. You will receive an email with the relevant information for accessing esa-star ASTRA, to manage your Rates Forms. Reject your registration: you will receive an email with the reason for rejection and you can restart the registration process.
- Send back your registration to request clarification of the information: you will receive an email with comments on the questionnaire. So, the questionnaire will be available again in edit mode and you'll be able to update your information and resubmit it.

If you decide to proceed with full registration, all sections of questionnaire must be completed: for this reason, the system checks all sections, including sections already edited for light registration, and the wizard prompts you at the first incomplete section.

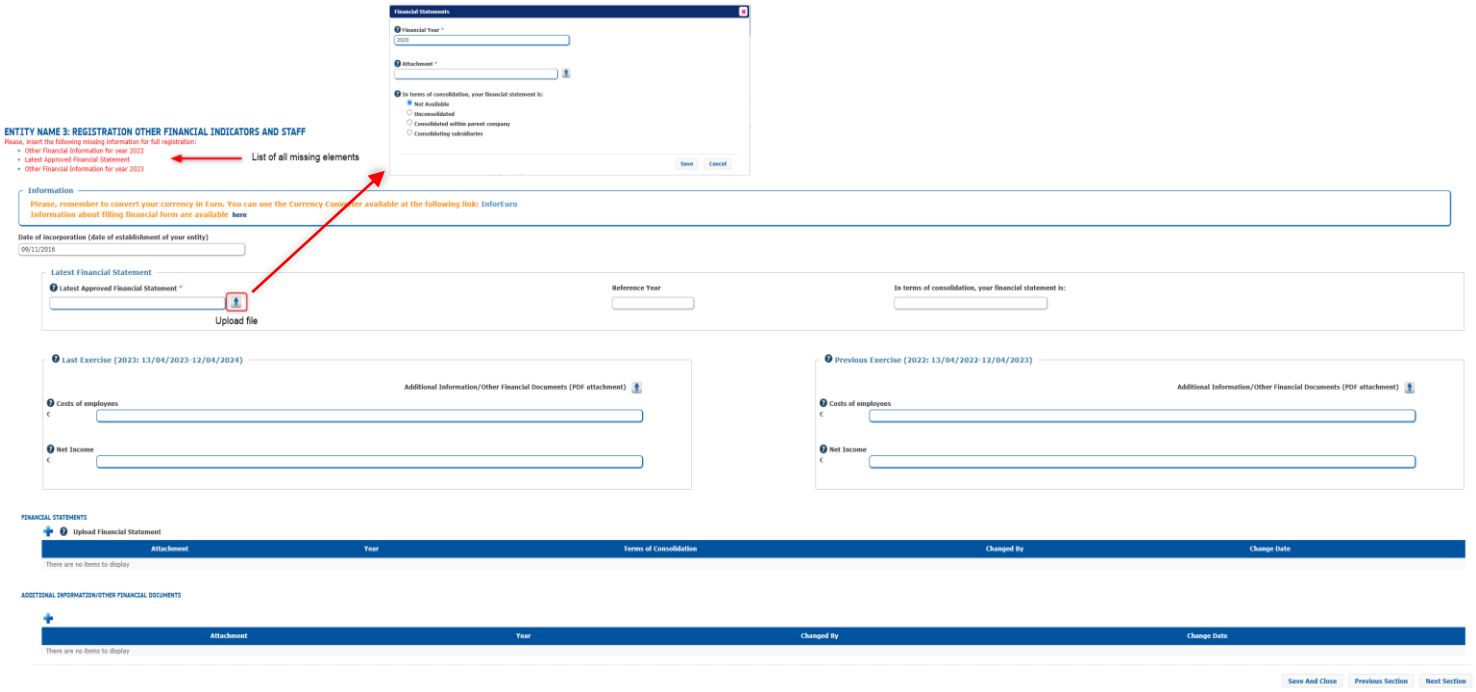
As part of the Full Registration process, in some sections you will be requested to tick a box to confirm the validity of the information provided. The boxes will be automatically unticked at the end of the accounting period and so will need to be ticked again to confirm the full registration of the entity.

The additional sections that you must complete for full registration are:

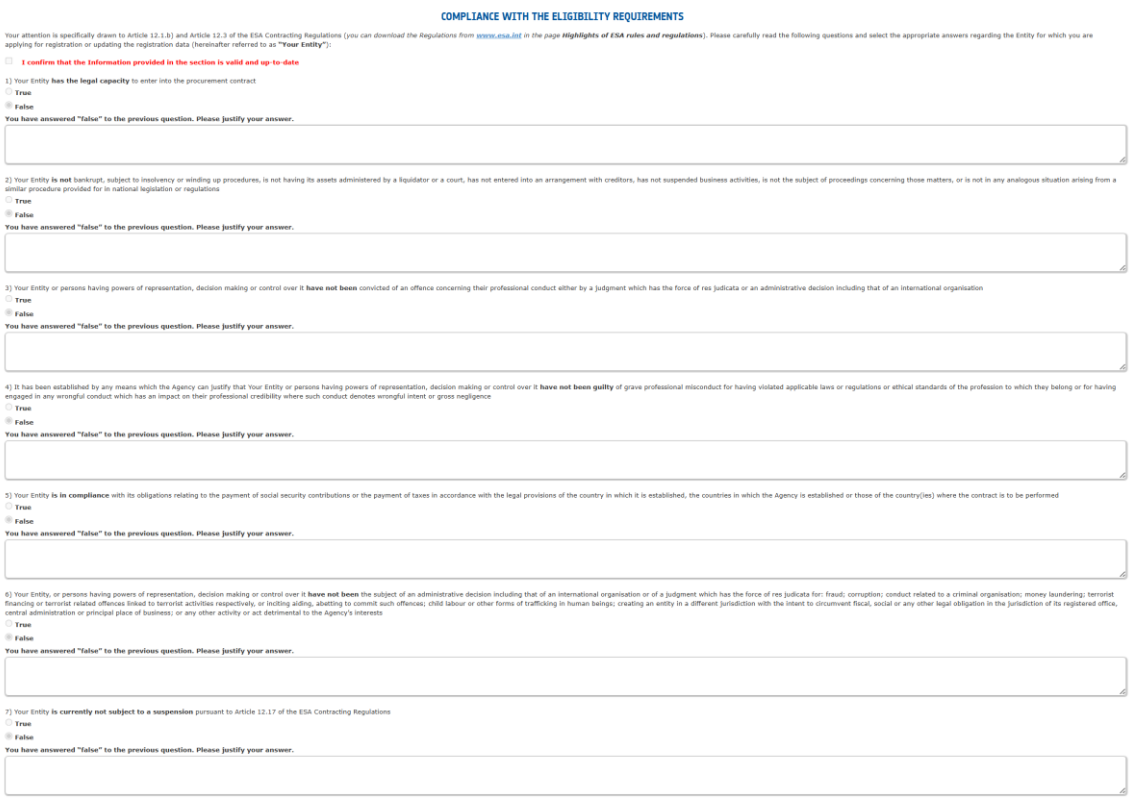
- Owners of Shares / Voting Rights Details: defines all shareholders of the entity.
  NOTE: The sum of percentage of shares must be 100%.
- Contacts: defines the two main entity contacts (see also par. 0).
  - If the entity type is company, you must select *Chief Executive Officer* and *Chief Financial Officer* in the Function section. It is also possible to add new Functions by typing them into this section.
  - If the entity type is different from company, you must select *Head of Institution* and *Head of Administration*. It is also possible to add new Functions by typing them into this section.



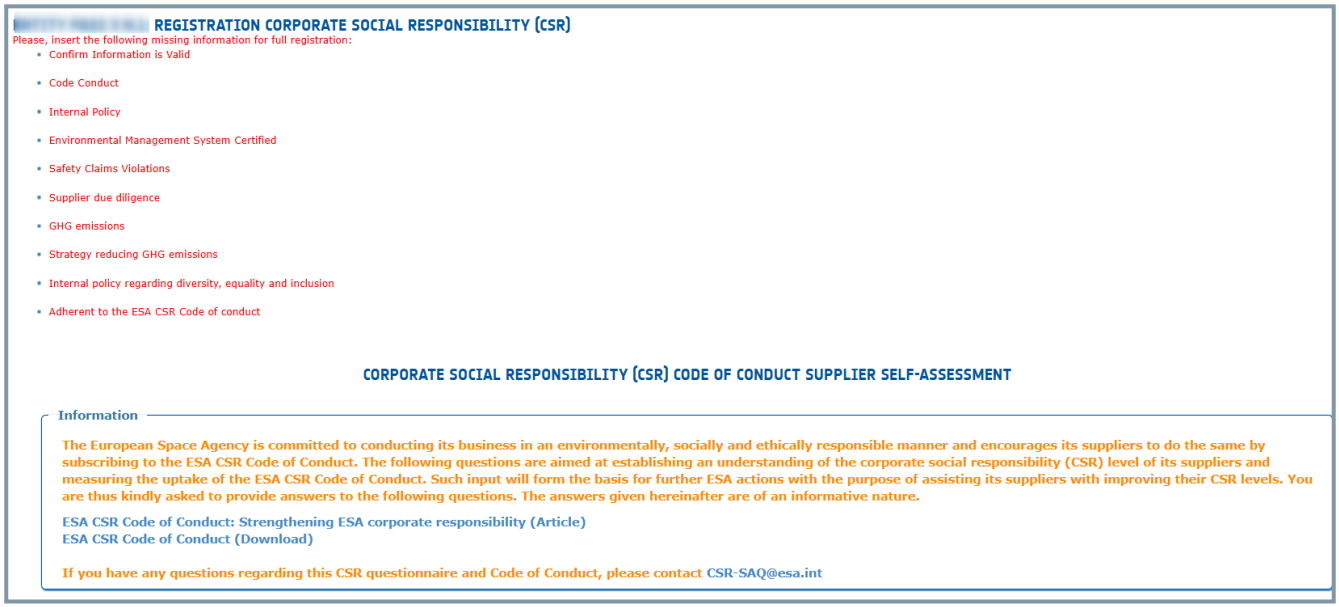

- Other Financial Indicators and Staff: defines other information of the last two financial years. Furthermore, you must upload the '*Latest Approve Financial Statement*' file. The allowed file types are pdf, doc, txt, png, gif, jpeg, ppt. The file uploaded in the '*Latest Approved Financial Statement*'" field is automatically replicated in the *"'Financial Statement'"* area (at the bottom of the section). The Financial Statement list shows all files uploaded, ordered by year and Last Update Time. It is possible to upload several files for the same Reference year. The '*Latest Approved Financial Statement*'" field shows information concerning the most recent year.




- **Compliance**: defines all statements for compliance with Article 12 of the ESA Contracting Regulations. You can select True or False for each statement of regulations



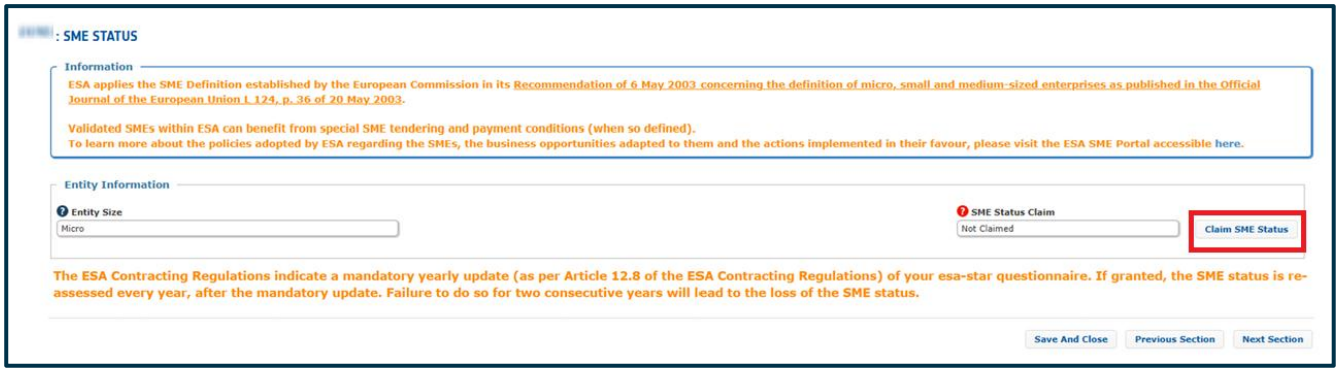
- **Corporate Social Responsibility (CSR)**: Entities are required to complete the section Corporate Social Responsibility Code of Conduct to obtain Full Registration.



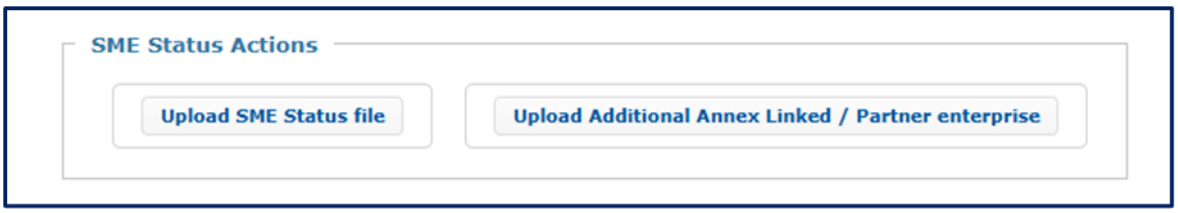

When the last section is filled-in for Full Registration, an information summary is displayed, and you can submit the questionnaire for approval by ESA (for further details see above).
To submit the questionnaire for Full Registration, the CSR section must be completed.

## 2.4. How to claim SME status

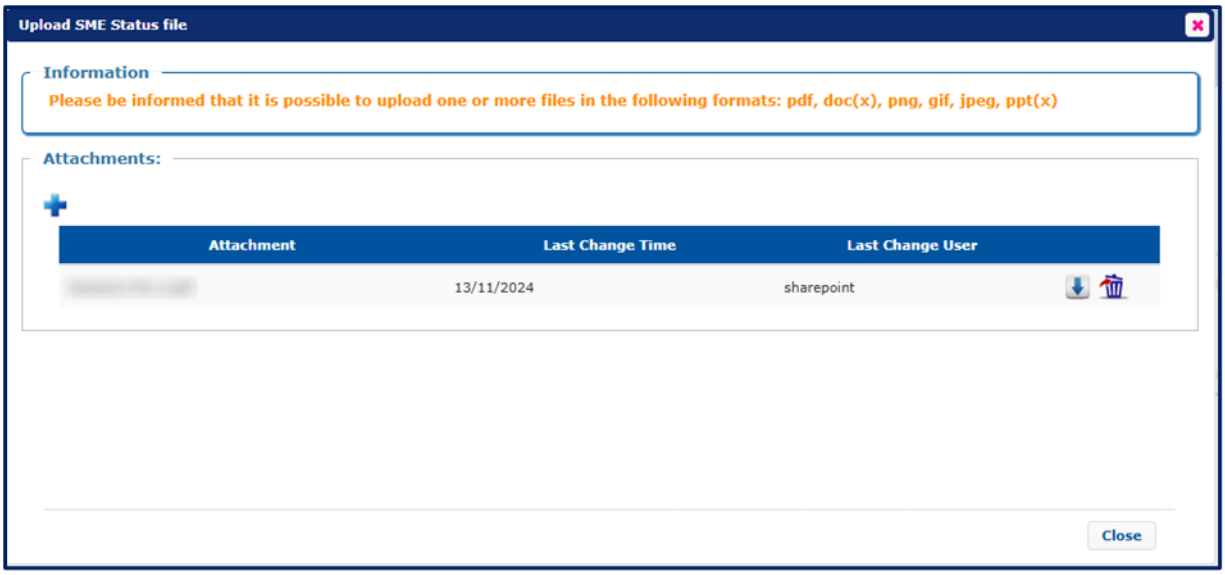
During the process of registration, you can claim the status of SME in the SME section. The valid SME status will enable the entity to benefit from tendering and payment conditions for SMEs when so defined.



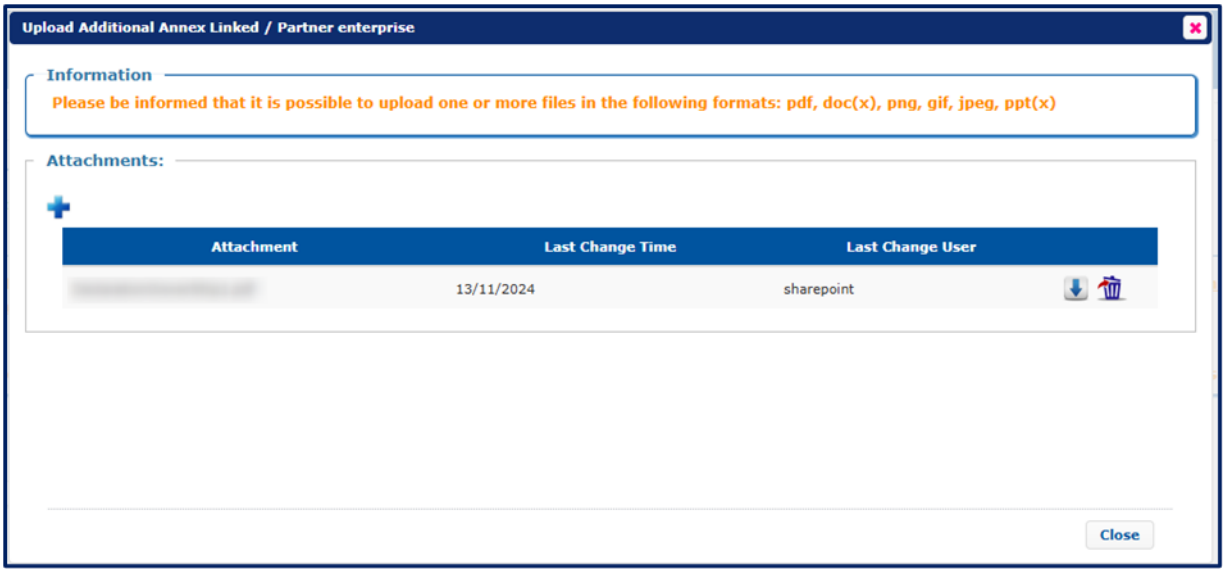
You can claim the status of SME only when your entity size is different from *Large* and when at least data for a financial year has been provided. Entity size is calculated based on inserted financial and staff data. Once your SME status has been validated, you do not need to continue claiming it each year. Your SME status will be reassessed annually by the entity validator or the system, based on the updated information. You can provide further information through dedicated functions (*Upload SME Status file* and *Upload Additional Annex/Linked/ Partner enterprise*) on a voluntary basis or upon specific request by ESA. The two functions are available after the Claim of the SME Status and only if the Entity Validators enable them




- **Upload SME Status file**: one or more files can be uploaded upon ESA request or on voluntary basis.




- **Upload Additional Annex/Linked/ Partner enterprise**: one or more files can be uploaded.



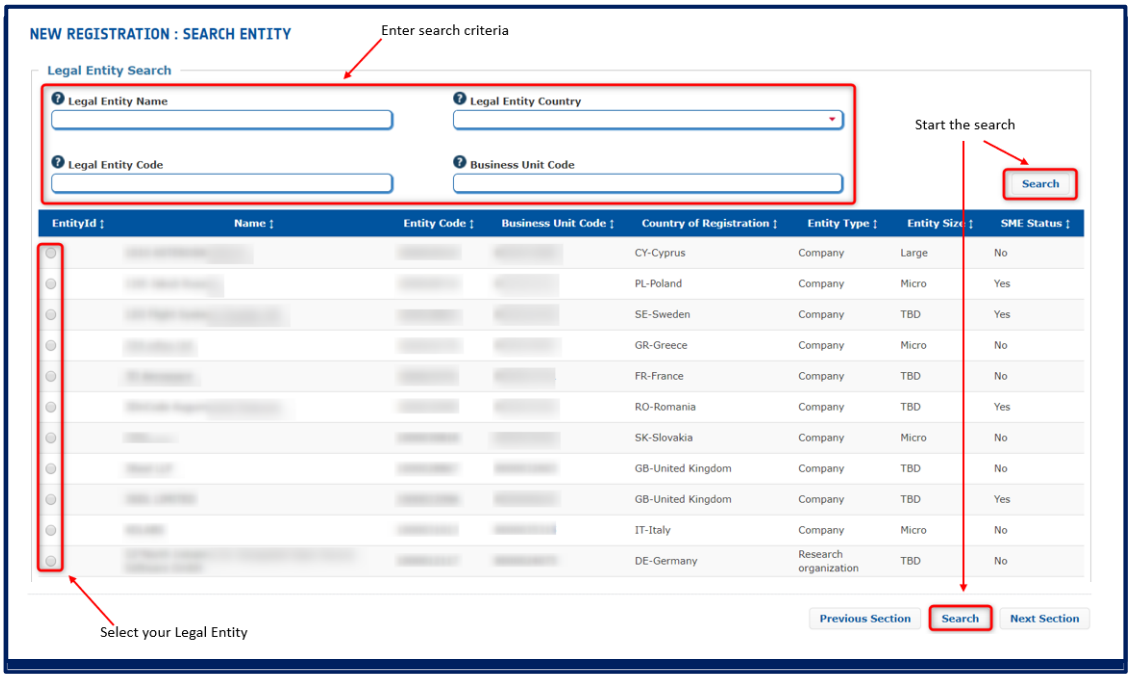

(http://www.esa.int/About_Us/Business_with_ESA/Small_and_Medium_Sized_Enterprises).

## 2.5. How to register a Business Unit

A Business Unit is a part or segment of the Legal Entity, representing a specific functional or geographic area. It can be - for example - a Department, a Division or an Establishment. A Business Unit can have its own bid manager users, allowed to create a bidder restricted area and post offers on behalf of the business unit. If the offer is selected a contract is awarded to the legal entity.

If you identify yourself with this definition, you can register your business unit in the esa-star system.

The registration process is very simple, and the first step requires you to select the legal entity.




When you have selected your legal entity, you need to enter the following:

- information for the identification of business unit (name, address and so on)
- information of the contact person (first name, last name, email and so on)
- captcha

Submitting the information, an email to the EIA and deputies of your Legal Entity is sent for their approval.

The EIA can:

- Reject the request: the business unit goes to the status *Rejected* and it is no longer available in the system.
- Accept the request: the EIA must define a business unit information administrator. An email is sent to the Entity Validator for approval by ESA.

The Entity Validator can:

- Approve your registration: an email to BUIA is sent with the credentials to access the esa-star Registration Internal Application using the following link:

  https://esastar-em.sso.esa.int

  An entity profile is automatically created in esa-match if the Business Unit is entitled to have one. The BUIA is notified and automatically assigned the esa-match Responsible

role. The BUIA is also automatically assigned the Entity Capabilities Responsible role and is granted access to the ECM module of esa-star.
The BUIA is notified and automatically assigned the Business Unit Rates Responsible role, to access esa-star ASTRA.

- Reject your registration: an email is sent to EIA and the business unit is no longer available in the system. The entity Validator can restore it: the BU returns in approval by legal entity and an email is sent to EIA.
- Send back your registration in order to request clarification of the information: the business unit returns to in approval by legal entity and an email is sent to EIA.

Business Units can be revoked by the ESA entity validator only. Revoked business units are no longer available for new contracts but there is no impact on running esa-p contracts. User access to all esa-star modules, including esa-match and ECM if applicable, is disabled while esa-p users are transferred at legal-entity level. All the Entity-related information available in esa-match and ECM (where applicable) will no longer be visible to any other users except ESA authorised personnel.

## 2.6. Questionnaire information publicly available

As soon as an entity is registered on esa-star Registration, a set of information filled in the questionnaire will be publicly available on the public site at the following urls:

- https://esastar-emr.sso.esa.int/PublicEntityDir/PublicEntityDir
- https://esastar-emr.sso.esa.int/PublicEntityDir/PublicEntityDirSme

More specifically, unregistered users can access the following data:

- Entity Name
- Country of Registration
- Entity Code
- VAT Number
- SME Status
- LSI
- Entity Description in English
- Entity Type

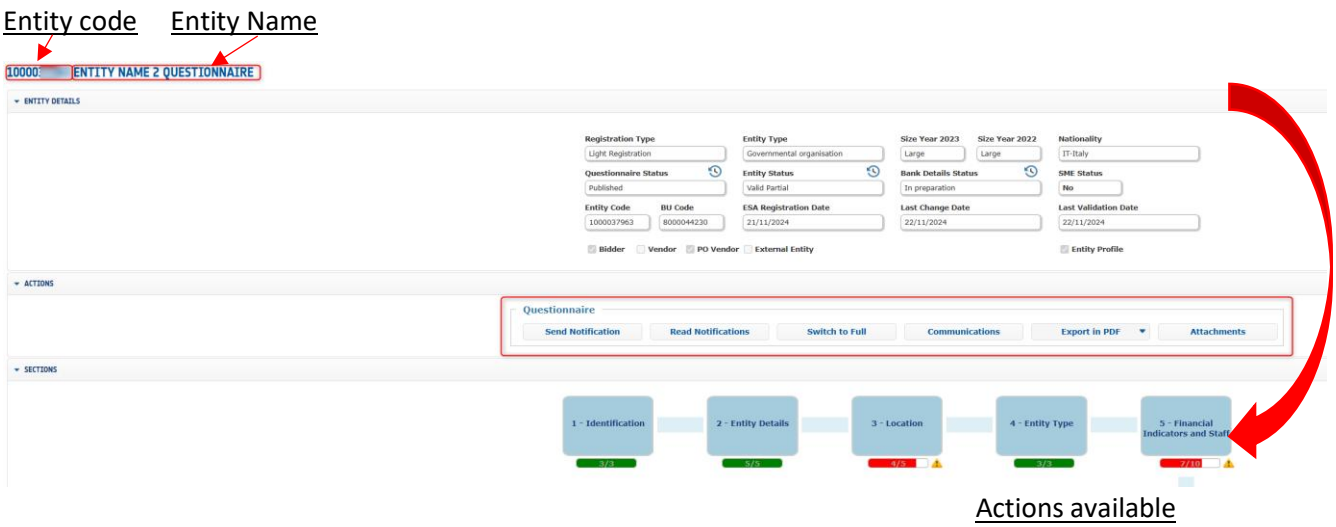
- Entity Size
- Address
- House Number
- City
- Postal Code
- Web Site

## 2.7. How to update the questionnaire

ESA Contracting Regulations require valid entities (not Blocked or Obsolete Entities) to update their registration information annually. Failure to do so in a timely manner may result in entity status being set to Blocked. Blocked status entails totally denied access to all esa-star modules, including esa-match and ECM when applicable.

To update questionnaire information, you must be the EIA or Deputy. After logging in to https://esastar-em.sso.esa.int with the ESA Corporate Authentication credentials received by email, the home page of your questionnaire opens.


→ THE EUROPEAN SPACE AGENCY
esa
Username
Password
Forgot or change your password?
Logon
Welcome to ESA Corporate Authentication and Single-Sign-On
Unauthorised or improper accesses may result in civil and criminal prosecution.
To be registered, or for any other support you might need, please send an email to esait.Service.Desk@esa.int | powered by esait




When you modify the data, you need to resubmit the questionnaire for approval by ESA.
The system only automatically validates the updated Questionnaire if the following fields have been modified:

- **Entity Details**: Street, House Number, Postal Code, City, Organisation Chart, Telephone, Fax, Entity Email, Entity Web Site
- **Entity Type**: All sections
- **CSR**: All sections
- **Financial Indicator and Staff Basics & Other**: Additional Information (attachments)
- **Structure**: Email, Telephone, (shareholder information); I confirm that the Information provided in the section is valid and up-to-date.
- **Compliance**: I confirm that the Information provided in the section is valid and up-to-date; You have answered “False” to the previous question. Please justify your answer (needed for each question if the selected option is “False”)
- **Competences**: All sections
- **Location**: Nationality Check Performed, I confirm that the Information provided in the section is valid and up-to-date.

Updating of the questionnaire depends on its status:

| Questionnaire Status | Description |
|---|---|
| **In preparation** | The questionnaire is in edit mode. For a registered Entity a copy is made from the published one and made available for modification. The published one remains |

| | |
|---|---|
| | available to all systems concerned (esa-star modules and esa-p). Information is available only to the Entity and to ESA authorised users.<br>The questionnaire has to be submitted to ESA to be validated. |
| **In Preparation by ESA** | The questionnaire is in edit mode for the ESA Validator and in read mode for the entity. |
| **Submitted for validation** | The questionnaire is under validation by ESA. Information is available only to the Entity and to ESA authorised users.<br>The questionnaire is in edit mode for the ESA Validator and in read mode for the entity. |
| **Published** | Questionnaire has been validated by ESA. A sub-set of Information is visible to all users in all concerned systems (esa-star modules and esa-p). Full Information is available only to the Entity and to ESA authorised users. |
| **Sent back** | The questionnaire is sent back by the ESA validator to ask for modification. The questionnaire is in edit mode for the Entity and ESA Validator. |
| **Rejected** | The Entity has been considered by the ESA Entity validator not eligible to do business with ESA. The questionnaire data is visible only to ESA selected users for reference. No Entity Code is assigned. No external users have access to this questionnaire. |

When you modify data in *Identification or Financial Indicator and Staff* section, the SME Status field will be recalculated; in case its value becomes "*No*", the SME Status Claim field will be automatically set to "*Not Claimed*".

When the accounting period for the entity expires, the esa-star system automatically sets the entity status to *To Be Updated*. In this case, it is necessary to update all financial data for the last year:

- Financial Basic and Staff
- Other Financial Indicators and Staff

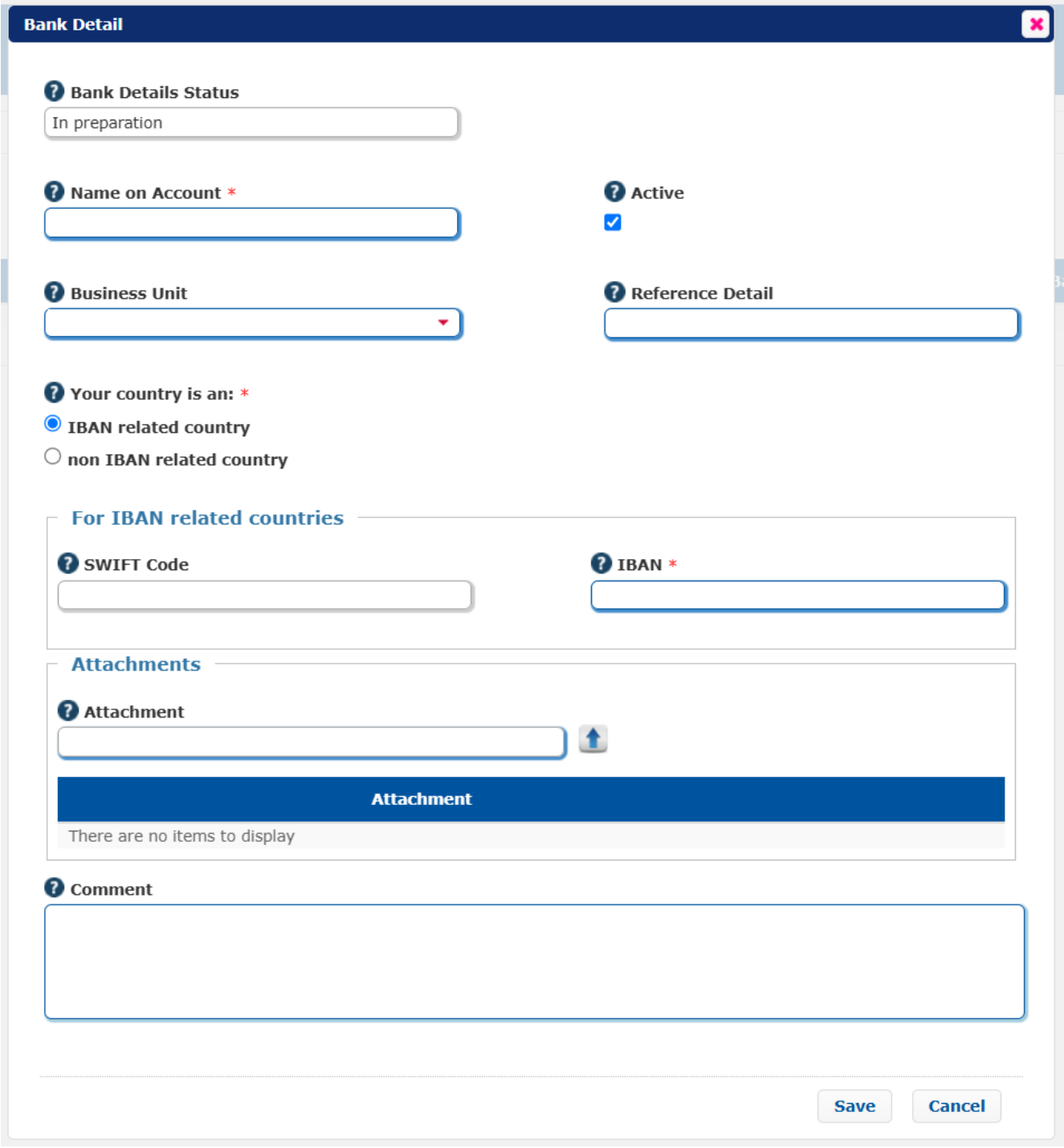
When updating, you can claim the SME status based on the financial data for the last three years, if you have not previously done so. After these changes, you need to resubmit the questionnaire for approval by ESA.

## 2.8. How to create, update or revoke a Bank Account

Each entity can notify ESA of one or more Bank Accounts that are used in the context of the esa-p system. In particular, when a contract is awarded to an entity, your updated bank account

information validated through esa-star is a necessary pre-requisite for you to submit invoices through esa-p and subsequently for ESA to process the payment. The entry and update of bank account information for the entity is allowed only by the Bank Detail Administrator (see table in par 2.1 and par. 2.9).

If you are not the Bank Administrator, please check the Contact section of the questionnaire to find the responsible person for your company (see below).



Opening the section 'Bank Details', the page with all bank accounts of the entity is presented in read mode: when you click on the '*Edit*' button, the page is displayed in edit mode. SWIFT code does not have to be inserted as it will be automatically generated by the system when the bank account is approved by ESA.

You can upload multiple attachments from relevant section by clicking on the arrow.
For non IBAN related countries from "Country of Bank" section you can find a drop down menu with the list of non IBAN related countries.
You can submit the bank accounts one by one for approval by the ESA Finance User.
The finance user can:

- Approve the bank account
- Send back

If you decide to submit a bank account, the request for approval is sent by email to the Finance User and your bank account becomes accessible only in read mode.
The Finance User can:

- Approve the bank account: bank account becomes *Published,* and you will receive an approval email with ESA comments.
- Send back the bank account to request clarification of the information: you will receive an email with comments on the bank account. So, the questionnaire will be available again in edit mode and you'll be able to update your information and resubmit it.

The editing of a single bank account depends on its status.

| Bank Account Status | Description |
|---|---|
| **In preparation** | The bank account is in edit mode for the bank account administrator of the Legal Entity and ESA Finance User. |
| **In Preparation by ESA** | The bank account is in edit mode for the ESA Finance User and in read mode for the entity. |
| **Submitted for validation** | The bank account is under validation by ESA. Information is available only to the Entity and to ESA authorized users.<br>The questionnaire is in edit mode for the ESA Finance User and in read mode for the entity. |

| | |
|---|---|
| **Published** | The bank account has been validated by ESA. A sub-set of Information is visible to all users in all concerned systems. Full Information is available only to the Entity and to ESA authorised users. |
| **Sent back** | The bank account is sent back by the ESA Finance User to ask for modification. The bank account is in edit mode for the Entity and ESA Finance User. |

The following fields cannot be modified for an account after its validation by ESA:

- For countries using IBAN: IBAN
- For countries not using IBAN: Country of Bank, Bank Number, Bank Account Number, Bank Name, Bank Address

If one of these fields needs to be modified, a new account should be created and the old one deactivated by unchecking the relevant flag.

In exceptional cases where esa-star is not operational, or does not yet support the entry of certain bank data:
Please contact the ESA Helpdesk directly (esait.Service.Desk@esa.int).
If you believe that the validation of your data is overdue, please contact the ESA Finance Department directly via email at: vendordata@esa.int

## 2.9. How to request the External Entity attribute

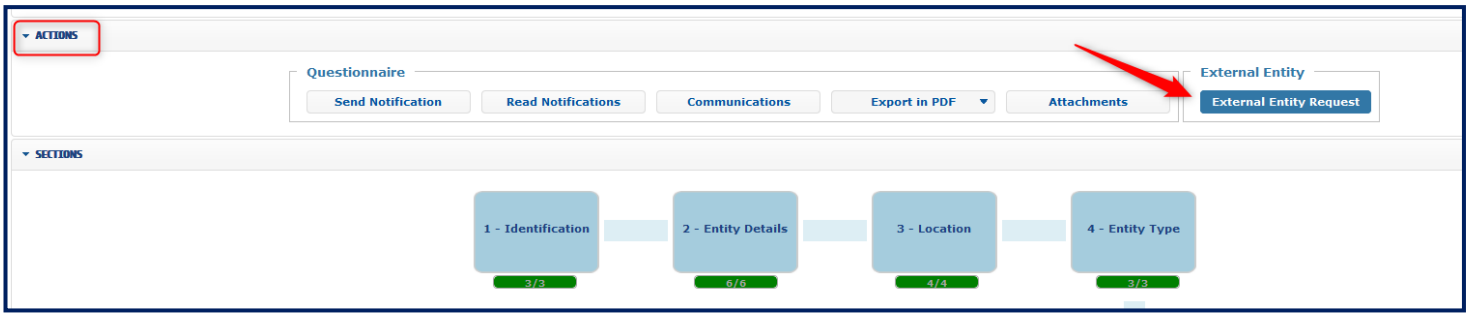
An External Entity is a generic definition for a company institute or agency with consolidated relations with ESA.
Contracts awarded by External Entities may or may not be related to activities financed by ESA. In particular, the esa-star Publication module allows:

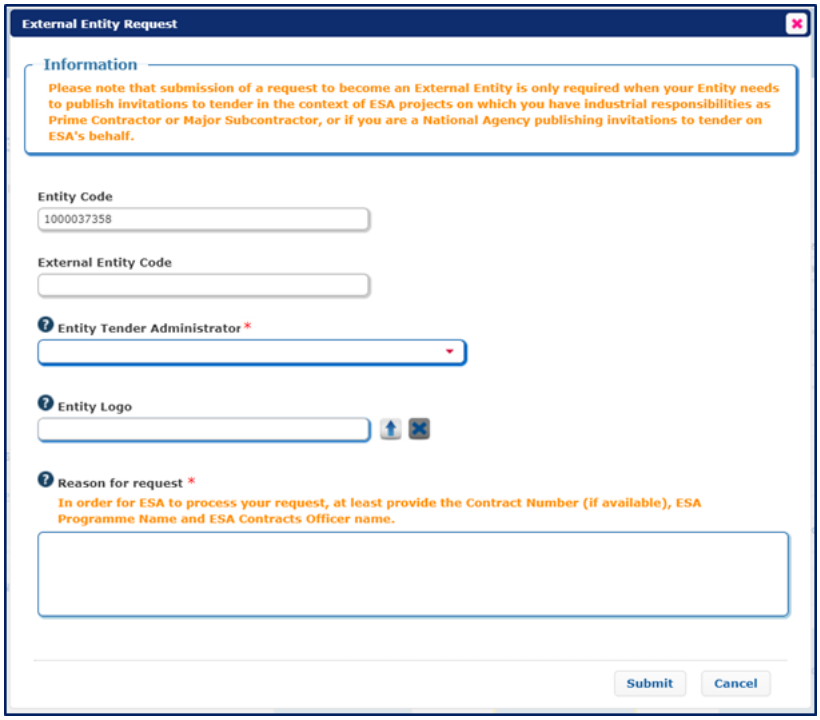
- Prime contractors (and major sub-contractors) working for the Agency, to publish invitations to tender for procurement actions initiated by them in the context of ESA programmes/projects, for which they have industrial responsibility
- National Agencies to publish invitations to tender on behalf of ESA, or on programmes related to ESA (e.g. the Arianne Programme).

If you wish to request the attribute of “External Entity” for your own Entity, you must be the EIA or Deputy. Log in to https://esastar-em.sso.esa.int/ with the ESA Corporate Authentication credentials received by email. You will see the home page of your questionnaire. Please note

that in order to proceed with the request, as a minimum requirement an Entity Tender Administrator needs to be defined in the “Contacts” section for your Entity (see Section 0).

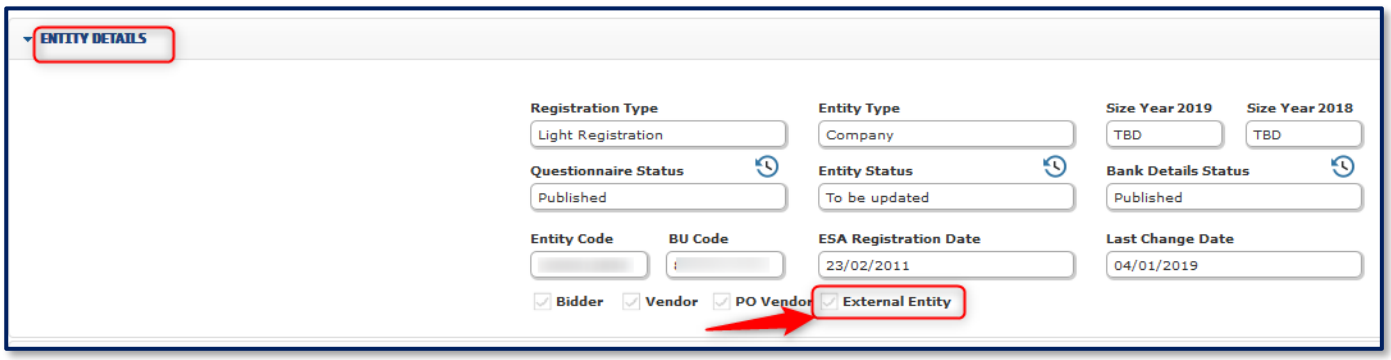
Click on ‘*External Entity Request*’ in the *Actions* section in order to open the form.



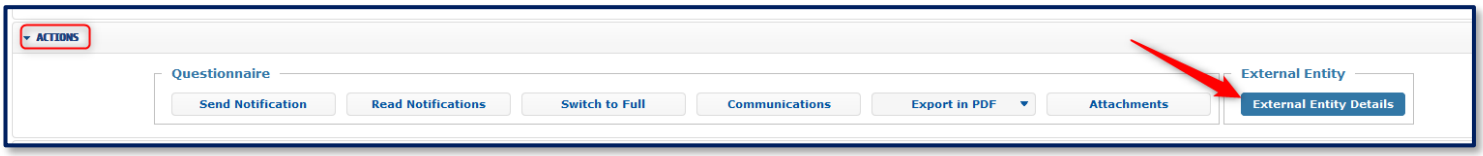




When you submit the request, an email is sent to the External Entity Validator for approval. The External Entity Validator can:

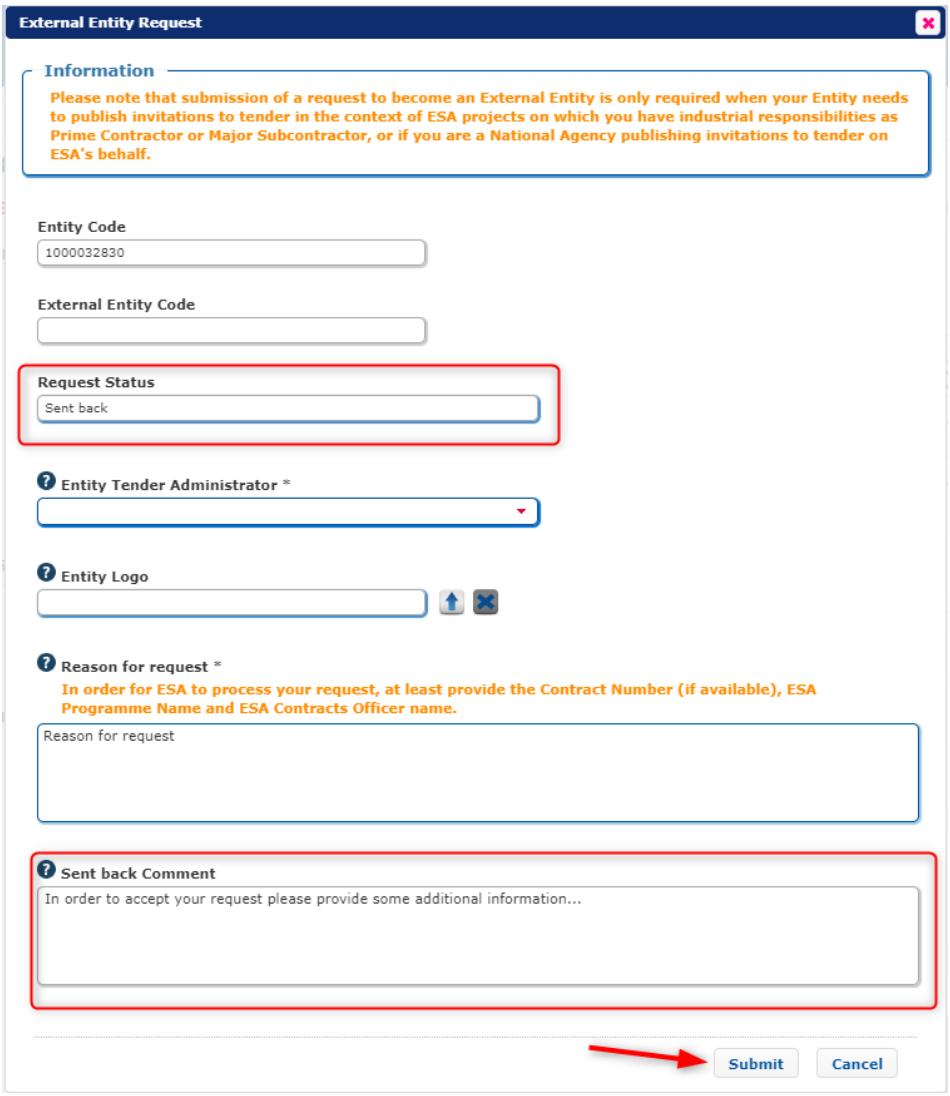
- Accept the request: your entity becomes an External Entity. An email is sent to the EIA and Deputy to inform them that the request has been accepted by ESA. The "*External Entity*" flag is marked in the "*Entity Details*" summary page.



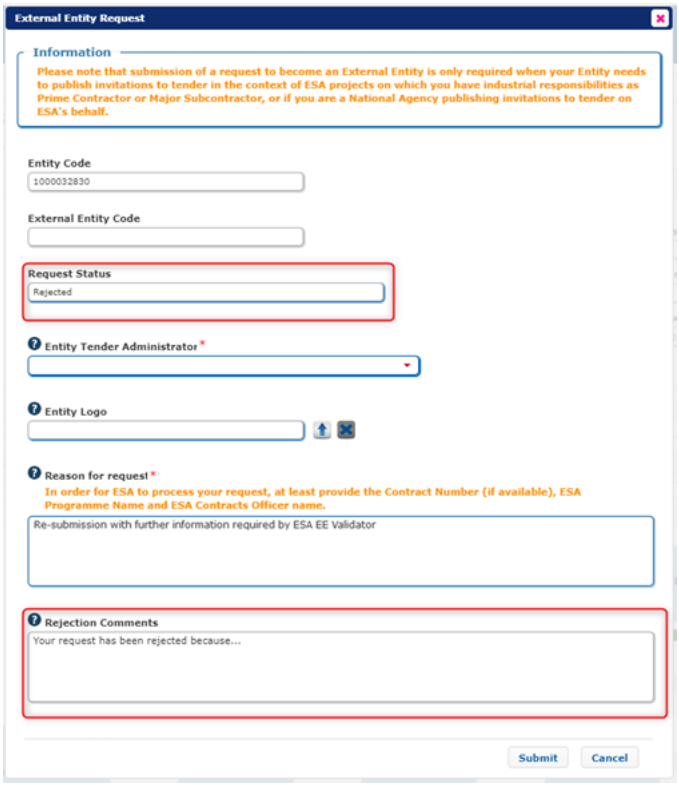

If you are an EIA or Deputy, you can also access the details of the request by clicking on the "*External Entities Details*" button on the homepage of the questionnaire. This replaces the "*External Entities Request*" button.



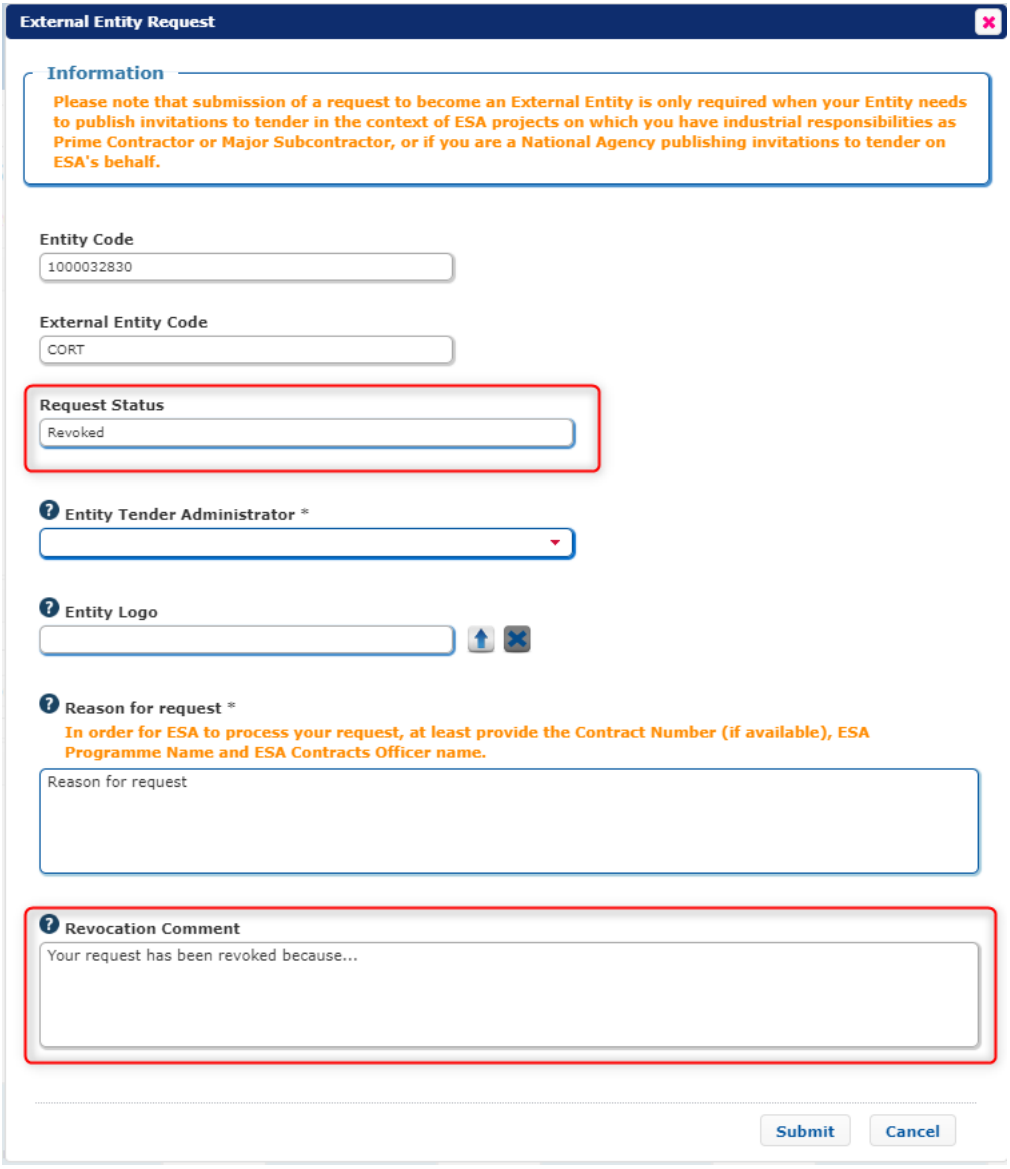

- Send back the request: in this case the information provided in the request is not sufficient for ESA and further details are required in order to carry out the assessment (approve/reject the request). The EIA and Deputy receive an email with the relevant information. By accessing "*External Entity Request*", they can see the "Sent Back Comment", update the form and resubmit the request to ESA.




- Reject the request: the request is not accepted by ESA. An email is sent to the EIA and Deputy to inform them that the request has been rejected. By accessing the "*External Entity Request*" section, they can see the "*Rejection comment*".




If a request is rejected by ESA and you need to submit a new request for your entity, provided you are an authorised entity user you can reuse the "*Rejected*" request instead of creating a new one. In this case, you can edit the "*Rejected*" request and resubmit it to ESA for approval.



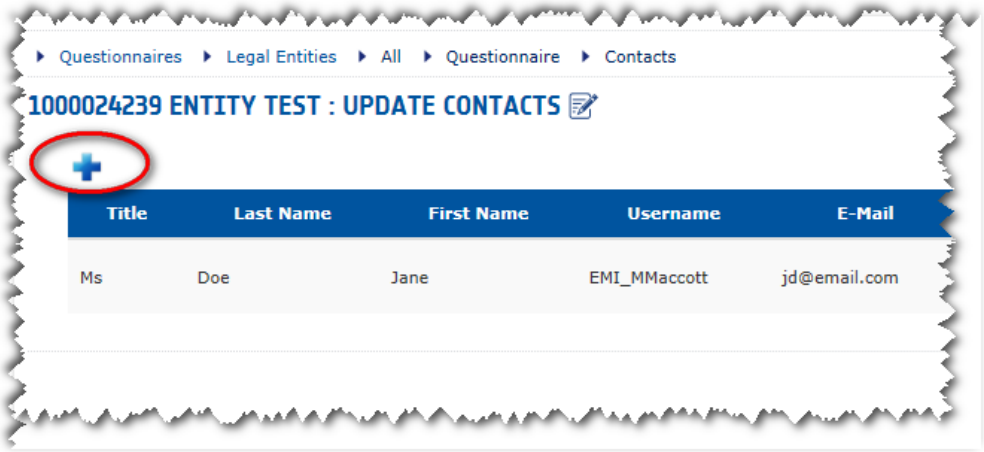

ESA can revoke an existing External Entity attribute. In this case the EIA, EIA Deputy and ETAs will be notified, the External Entity flag will be removed in the Entity Details summary page and you will find details of the revocation in the "*External Entity Request*" section.

If you need to submit a new request in the future, you will be able to use the same form.
Once the request to become an External Entity has been accepted by ESA, your Entity may be allowed to submit a request in esa-star Tendering to publish Tender Actions under a specific ESA Contract (so-called "Best Practices"). The Entity Tender Administrator role is responsible for this action.

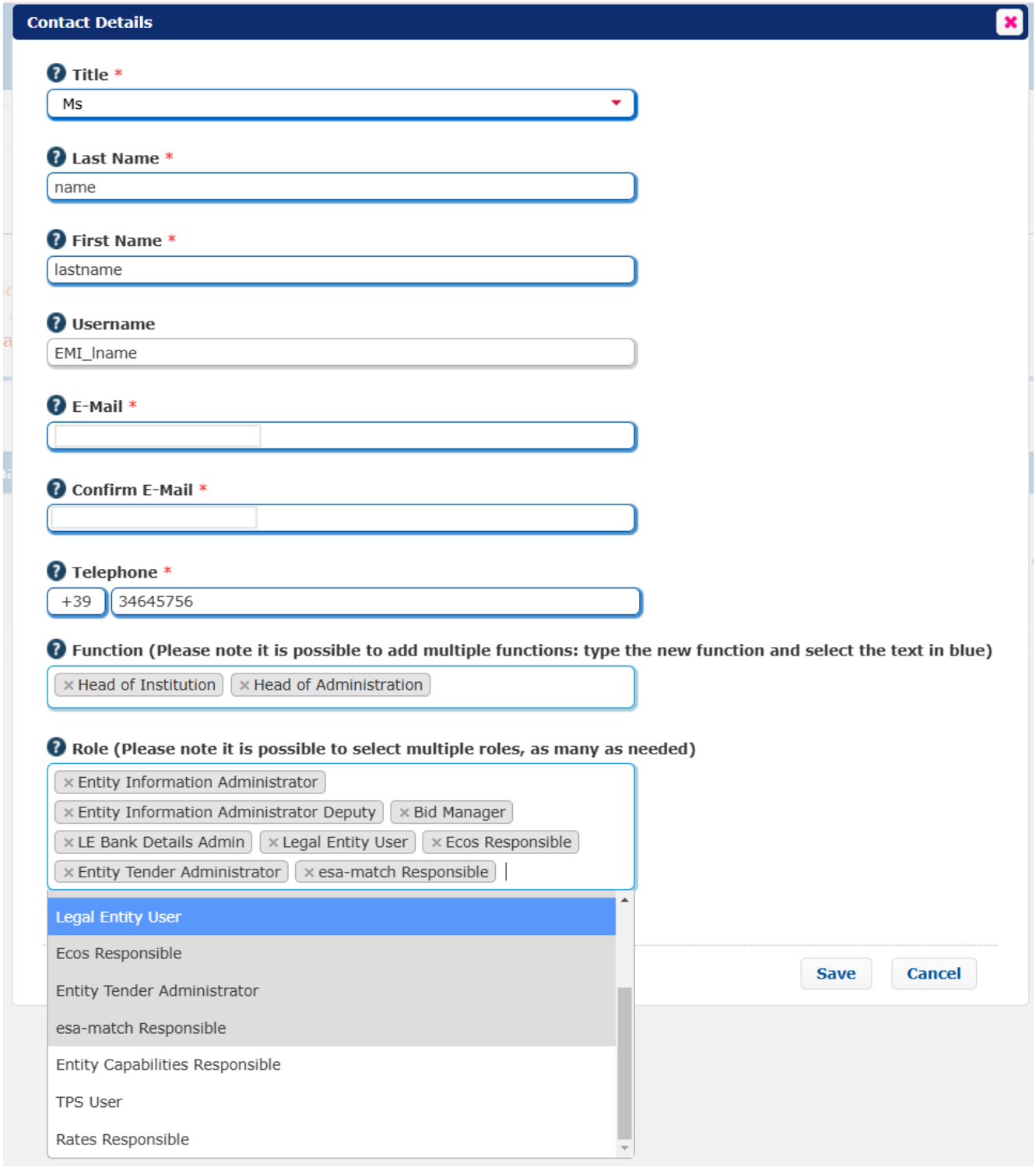
## 2.10. How to add additional contacts or grant an existing contact with an application role

During the registration/update of an entity, the EIA (or their deputy) can assign to each contact available in the Contact section of the questionnaire one or more roles that grant them a specific role(s) for the various ESA Corporate applications (see table in par. 2.1 for reference). In particular, if you want to create a new contact for a colleague and assign to them a role for an ESA Corporate application, complete the steps as follows:

1. Open the Contact section of the questionnaire
2. Enter in Edit mode and click on the + icon




3. In the pop-up screen fill in the mandatory contact information (marked with *)
4. In the *Role* field select the role you want to grant to the user (you can insert multiple roles for each contact)
5. Click *Save* in the pop-up screen


Contact Details
Title *
Ms
Last Name *
name
First Name *
lastname
Username
EMI_lname
E-Mail *
Confirm E-Mail *
Telephone *
+39
34645756
Function (Please note it is possible to add multiple functions: type the new function and select the text in blue)
Head of Institution
Head of Administration
Role (Please note it is possible to select multiple roles, as many as needed)
Entity Information Administrator
Entity Information Administrator Deputy
Bid Manager
LE Bank Details Admin
Legal Entity User
Ecos Responsible
Entity Tender Administrator
esa-match Responsible
Legal Entity User
Ecos Responsible
Entity Tender Administrator
esa-match Responsible
Entity Capabilities Responsible
TPS User
Rates Responsible
Save
Cancel

6. Click *Save* in the Contact section of the questionnaire.

If you want to grant an existing contact an application role you have to enter the Contact section of the questionnaire in Edit mode, click on the pencil icon on the right of the contact and then proceed as per steps 4, 5 and 6 above.

Please note that:

- Identity certification is a required step before users are granted access to any esa-star modules and esa-p. The Entity Information Administrator (or their deputy) and/or the Business Unit Information Administrator (in the case of a Business Unit) shall verify the user's identity offline and confirm that the account has been activated and the initial password has been changed. See 2.12 for detailed instructions.
- For contacts of Business Units, the Business Unit Information Administrator is responsible for role assignment and the roles that can be selected are only the ones applicable in the context of a Business Unit.
- The granting of the role “esa-p User” is available only after the entity has obtained the status Valid Full. However, it is recommended that users are granted such roles only after the entity has been awarded with a contract. The granting of this role is not an immediate action but starts a process of account creation for the esa-p system that may take up to 1 day for completion.
- The granting of the role “Contract Manager” is available only after the entity has obtained the status Valid Full. However, it is recommended to grant users such roles only after the entity has been awarded with a contract.
- Granting the “esa-match Responsible” role is only possible if the entity is entitled to have a profile in esa-match. At least one user belonging to your entity needs to have this role assigned, as only esa-match Responsibles can manage the entity profile and assign esa-match Conversation managers in the esa-match system.
- Granting the “Entity Capabilities Responsible” role is only possible if the entity is entitled to have a profile in esa-star ECM. At least one user belonging to your organisation needs to have this role assigned, to monitor and accept the Harmonisation Cycle outcomes and manage the Contact Points in ECM.

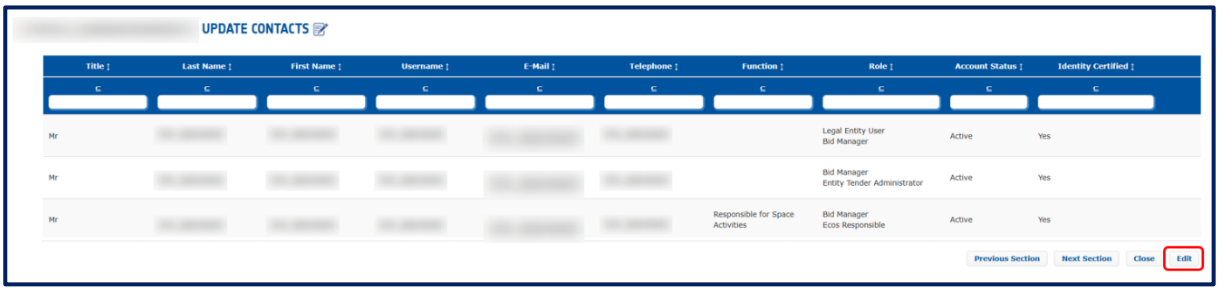
- At least one user belonging to your organisation needs to have the Rates Responsible role assigned, to manage your Rates Forms on esa-star ASTRA.
- Granting the “ESA BIC Manager” role is only available when the Entity has already been defined as an Incubator.
- The list of roles owned by each contact is visible in the “Role” column in the Contact section of the questionnaire.

## 2.11. How to delete an existing contact

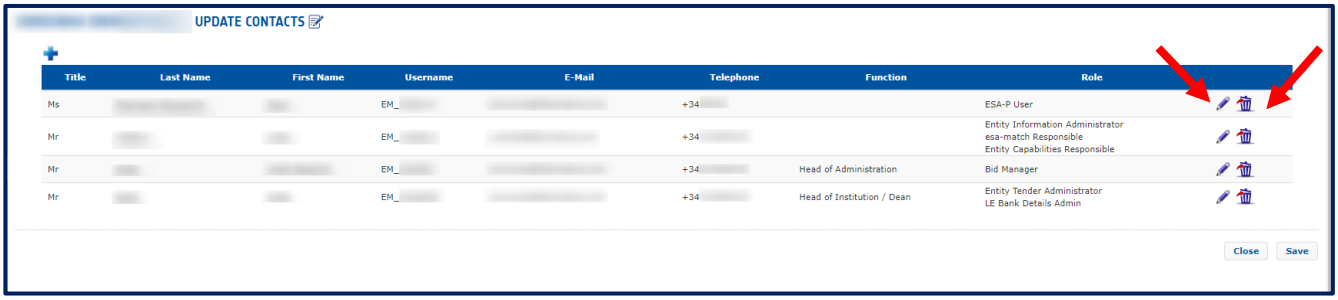
During the registration/update of an entity, the Entity Information Administrator (or their deputy) and/or the Business Unit Information Administrator (in case the entity is a Business Unit) can delete an existing contact defined in the “Contacts” section of the questionnaire.

To remove a contact from the list, the following steps should be performed:

1. Access the “Contacts” section of the questionnaire home page.
2. Enter Edit mode.




3. For each existing contact it is possible to modify data ( icon) or to remove it from the list ( icon).



4. Click on the  icon.
5. Click *Save* in the Contact section of the questionnaire.

As soon as the data have been successfully saved, the deleted user:

- Is no longer available in the list.
- No longer has access to all the esa-star applications, as the account has been disabled.

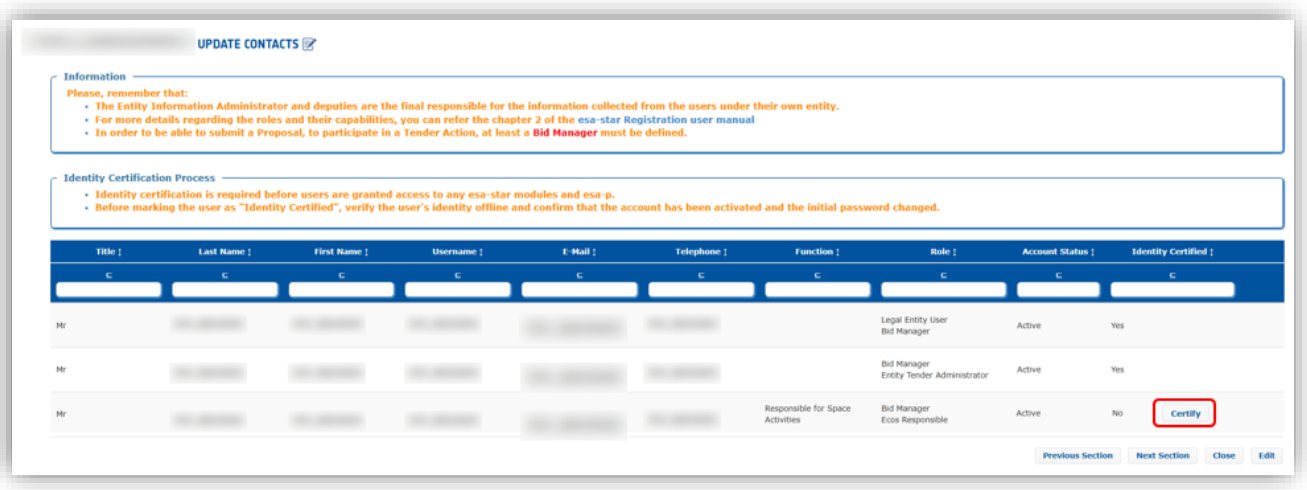
## 2.12. How to certify the identity of an active contact

Following the creation of a contact person and the assignment of roles, the Entity Information Administrator (or their deputy) and/or the Business Unit Information Administrator (in the case of a Business Unit) is responsible for certifying the identity of the contacts defined in the “Contacts” section of the questionnaire.

Identity certification is required before users are granted access to any esa-star modules and esa-p. The Entity Information Administrator (or their deputy) and/or the Business Unit Information Administrator (if the entity is a Business Unit) shall verify the user's identity offline and confirm that the account has been activated and the initial password has been changed.

To certify the identity of a contact in the list, follow these steps:

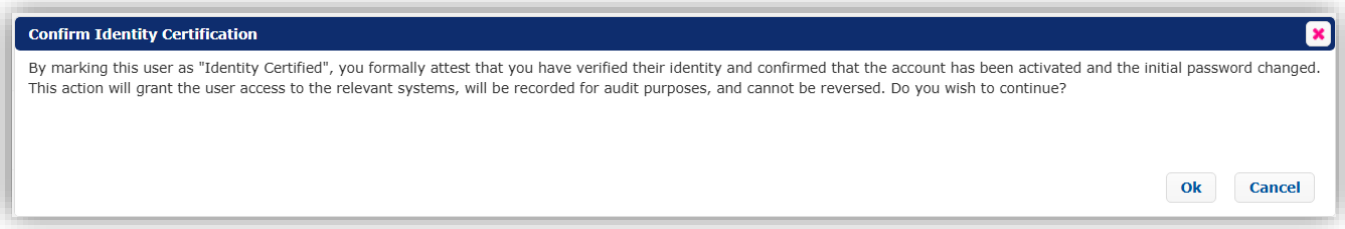
1. Access the “Contacts” section of the questionnaire home page.
2. Click on the “Certify” button in the “Identity Certified” column next to the contact.




The "Identity Certified" column indicates the certification status of each ESA Corporate Authentication user account:

- ***Yes***: the user account is certified, and the user can access the ESA Corporate Applications they have been granted access to after logging in.
- ***No***: The "Certify" button is also displayed. The user account is not certified and access to ESA Corporate Applications is prevented after login.
- ***Empty:*** the user account is disabled and logging in to ESA Corporate Applications is prevented.

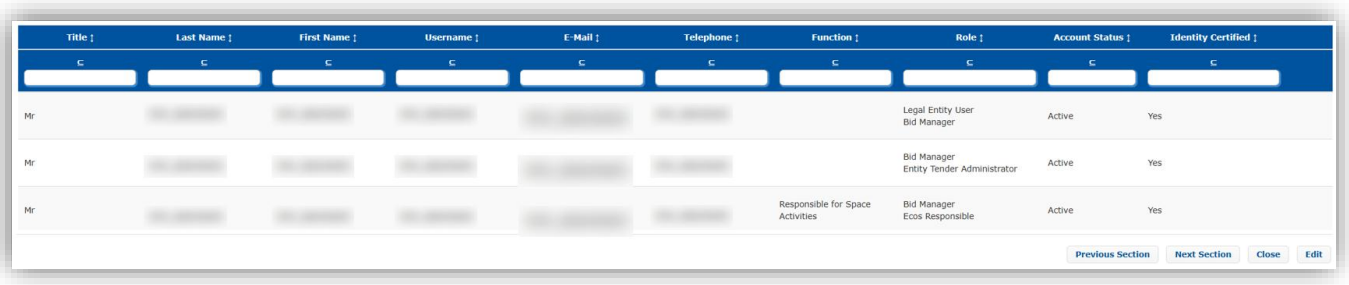
After clicking on the "Certify" button, a pop-up appears asking you to confirm the required action:




When you click on "Ok", the following operations are carried out:

- The "Identity Certified" status changes to "Yes", and the **"**Certify" *button is no longer displayed.*
- The new user accounts are enabled for access to ESA Corporate Applications.

Once the above operations are complete, the contacts list in the “Contacts” section is updated accordingly.



| Title | Last Name | First Name | Username | E-Mail | Telephone | Function | Role | Account Status | Identity Certified |
|---|---|---|---|---|---|---|---|---|---|
| Mr | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] | | Legal Entity User<br>Bid Manager | Active | Yes |
| Mr | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] | | Bid Manager<br>Entity Tender Administrator | Active | Yes |
| Mr | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] | Responsible for Space Activities | Bid Manager<br>Ecos Responsible | Active | Yes |

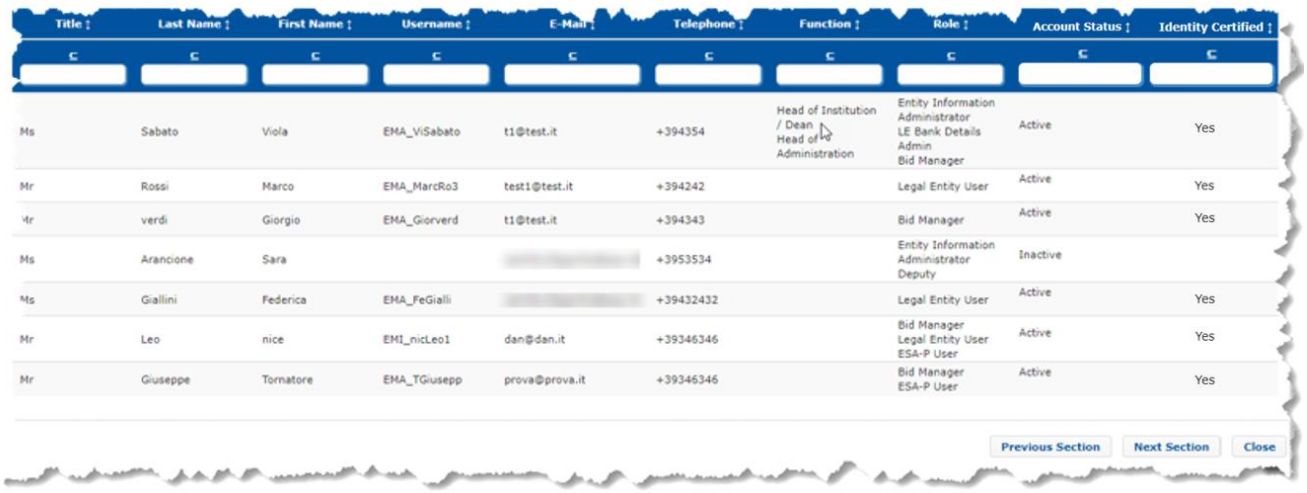
Previous Section | Next Section | Close | Edit

## 2.13. How to reactivate an expired user account for an existing contact

In order to improve the lifecycle management of user identities and to reduce the exposure to security incidents, ESA will implement the rule below, which is applicable to user accounts enabled to access ESA Corporate Applications in compliance with the esait Password Management Policy:

- Any ESA Corporate Account that has not been used for more than one year to access any ESA system service will be permanently deactivated.

The ESA Corporate Account and Single-Sign-On system is configured to send reminder emails automatically to the address associated with the user account, informing the user of the expiration deadline and the actions needed to keep the account active.
The ESA Corporate Authentication account status is visible in the esa-star Registration Contact section as shown below.



| Title | Last Name | First Name | Username | E-Mail | Telephone | Function | Role | Account Status | Identity Certified |
|---|---|---|---|---|---|---|---|---|---|
| Ms | Sabato | Viola | EMA_ViSabato | t1@test.it | +394354 | Head of Institution / Dean Head of Administration | Entity Information Administrator LE Bank Details Admin Bid Manager | Active | Yes |
| Mr | Rossi | Marco | EMA_MarcRo3 | test1@test.it | +394242 | | Legal Entity User | Active | Yes |
| Mr | verdi | Giorgio | EMA_Giorverd | t1@test.it | +394343 | | Bid Manager | Active | Yes |
| Ms | Arancione | Sara | | [redacted] | +3953534 | | Entity Information Administrator Deputy | Inactive | |
| Ms | Giallini | Federica | EMA_FeGialli | [redacted] | +39432432 | | Legal Entity User | Active | Yes |
| Mr | Leo | nice | EMI_nicLeo1 | dan@dan.it | +39346346 | | Bid Manager Legal Entity User ESA-P User | Active | Yes |
| Mr | Giuseppe | Tornatore | EMA_TGiusepp | prova@prova.it | +39346346 | | Bid Manager ESA-P User | Active | Yes |

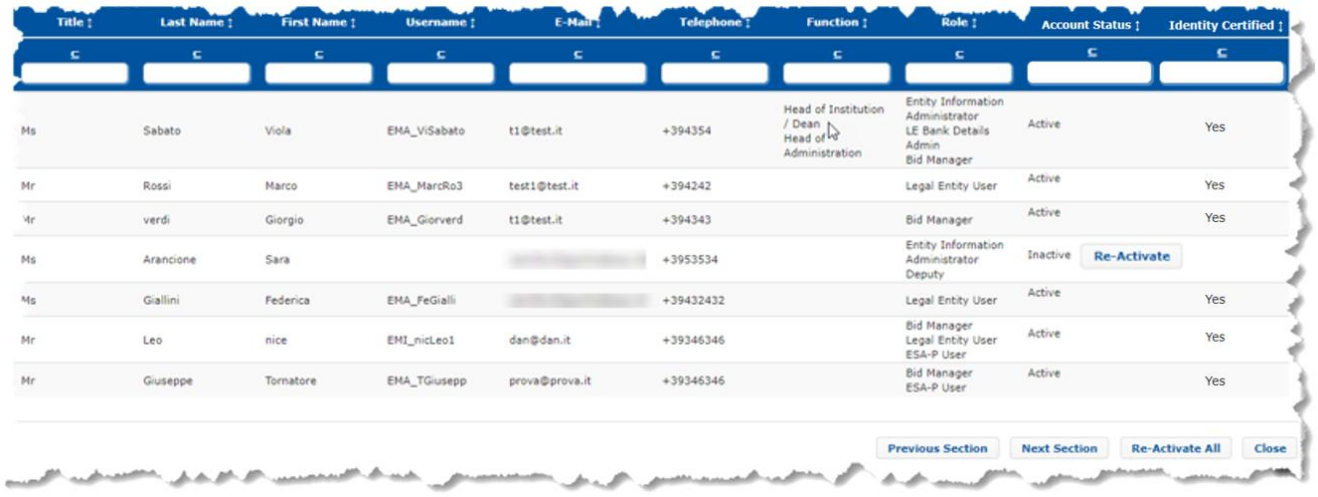
Previous Section | Next Section | Close

As you can see, the *Account Status* column indicates the status of each ESA Corporate Authentication user account:

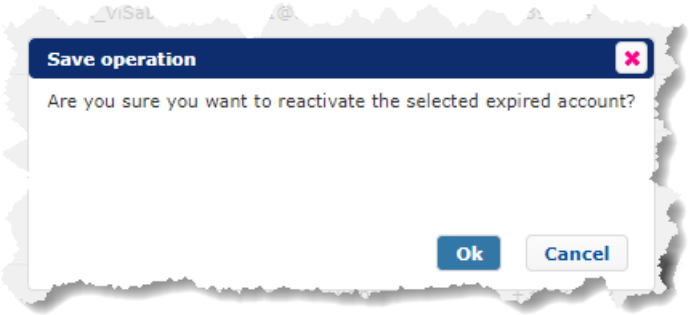
- ***Active***: the user account is enabled:
  - ***Identity Certified = Yes***: the user can log in to the ESA Corporate Applications they have been granted access to.
  - ***Identity Certified = No***: the user can log in, but access to ESA Corporate Applications is prevented.
- ***Inactive***: the user account is disabled:
  - ***Identity Certified is empty***: logging in to ESA Corporate Applications is prevented.

For inactive user accounts, the disabled username is removed from the relevant contact information, but the EIA or EIA Deputies are able to reactivate the contact by using the following functions available only to them in the Contact section:

- ***Re-activate*** button: available directly in the list for each inactive user account. Only allows the specific user account to be re-enabled.
- ***Re-activate All*** button: available in the toolbar at the bottom of the list. Allows all inactive user accounts to be reactivated in one go.



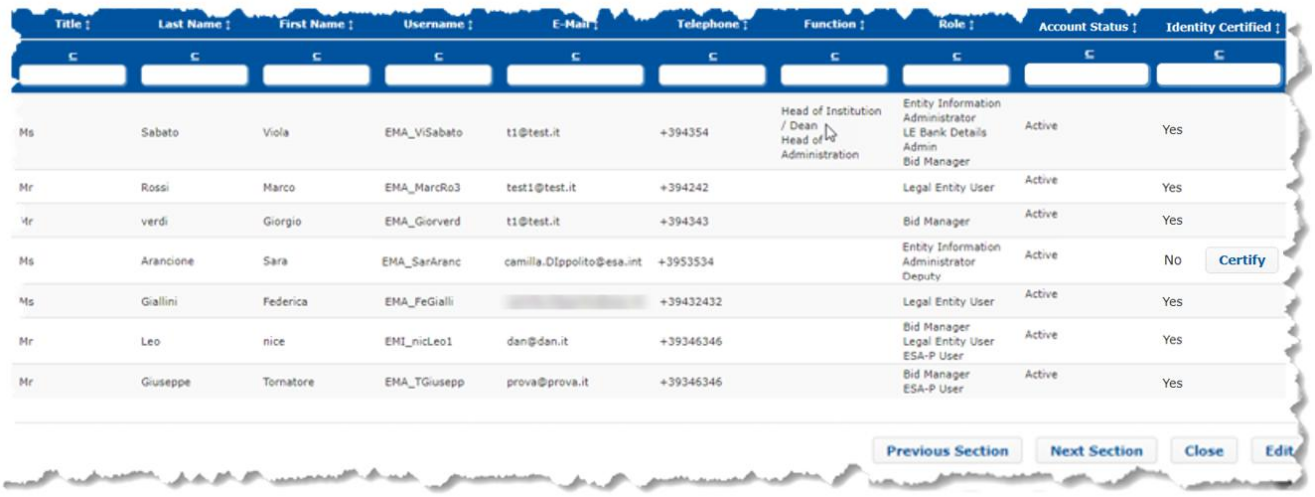

In both cases, after clicking on the button a pop-up appears to confirm the required action:




When you click on “Ok”, the following operations are carried out:

- A new ESA Corporate Authentication account is created for the relevant contact(s). The account will be automatically assigned the same roles as those before deactivation.
- The new user accounts are not automatically created in the other esa-star modules and esa-p (if needed).
- The “Identity Certified” status is set to “No” and the “Certify” button appears. Only after identity certification will the new user accounts be enabled for access to ESA Corporate Applications.

Once the above operations are complete, the contacts list in the Contacts section is updated accordingly.




The reactivated contact(s) will be informed of their new username via email by the ESA Corporate Authentication system (as per the current process).

Please be aware that when an account is permanently deactivated, all the personal preferences and settings stored at user-account level (e.g. privacy or notifications settings) will be lost and not transferred to the re-enabled account.

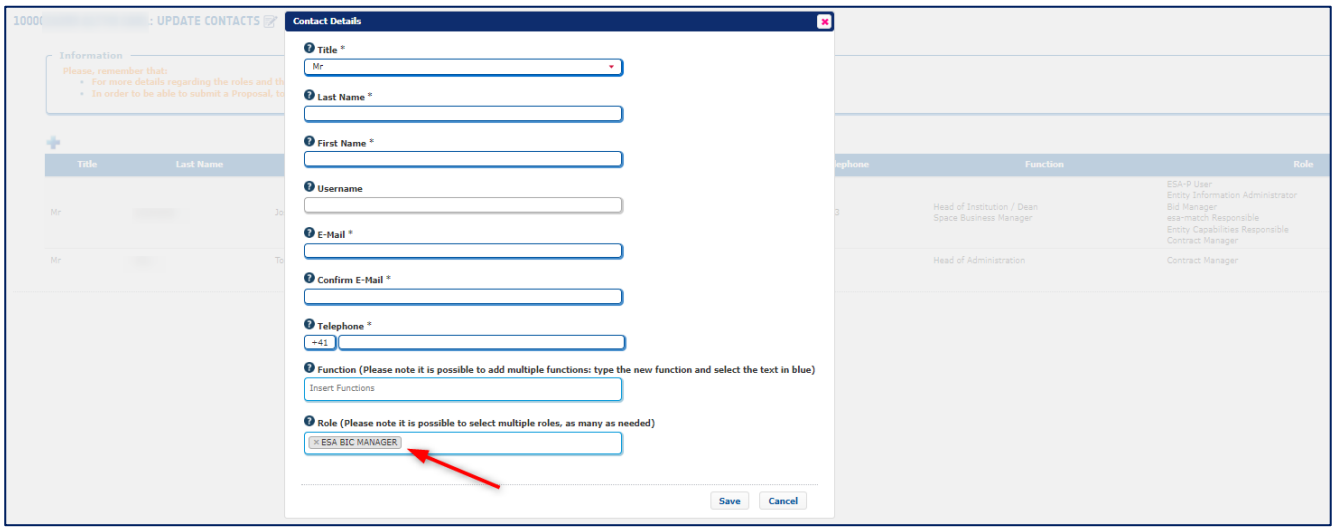
If the ESA Corporate Authentication accounts of the EIA and EIA Deputies are all inactive, please contact the esait Service Desk.

# 3. ESA BIC INCUBATION CONTRACT MANAGEMENT

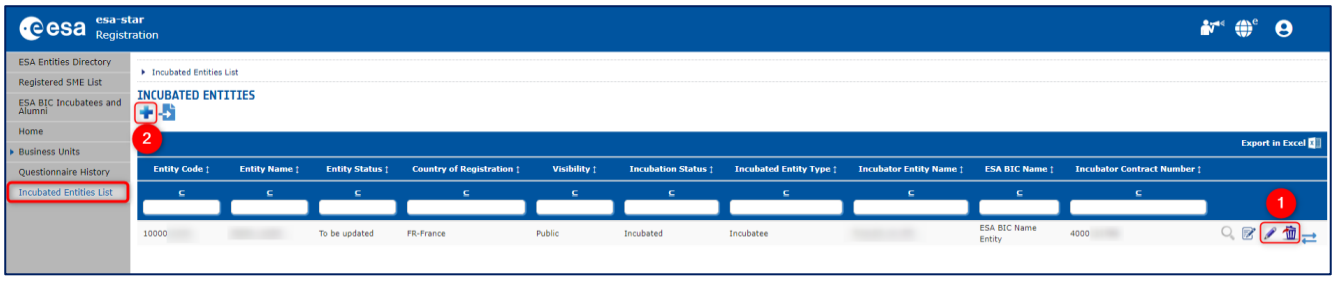
## 3.1. How to add Incubated Entities to an ESA BIC Contract

Adding Incubated Entities falls under the responsibility of the ESA BIC Manager of a Legal Entity defined as ESA BIC.

The ESA BIC Manager is a role assigned by the Entity Information Administrator in the Contacts section (see par. 2.9 for more information about how to create contacts or assign roles in esa-star Registration).

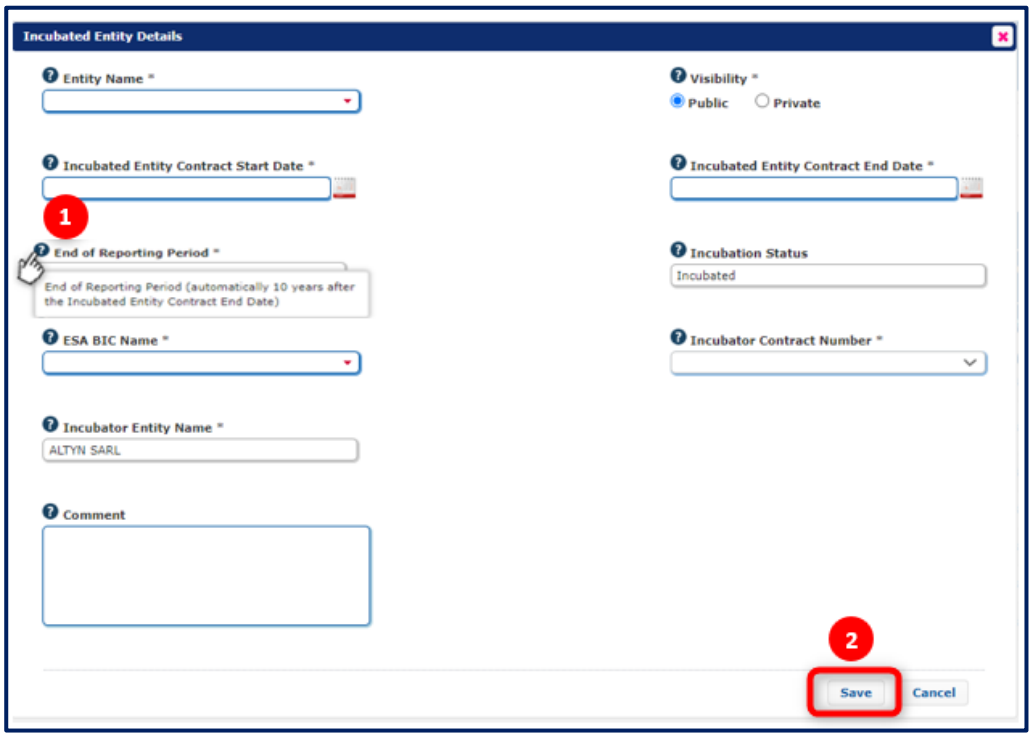



The ESA BIC Manager can edit/delete (1) and add (2) the Incubated Entities part of the Incubation Contract by clicking on 'Incubated Entities List' in the quick launch menu.



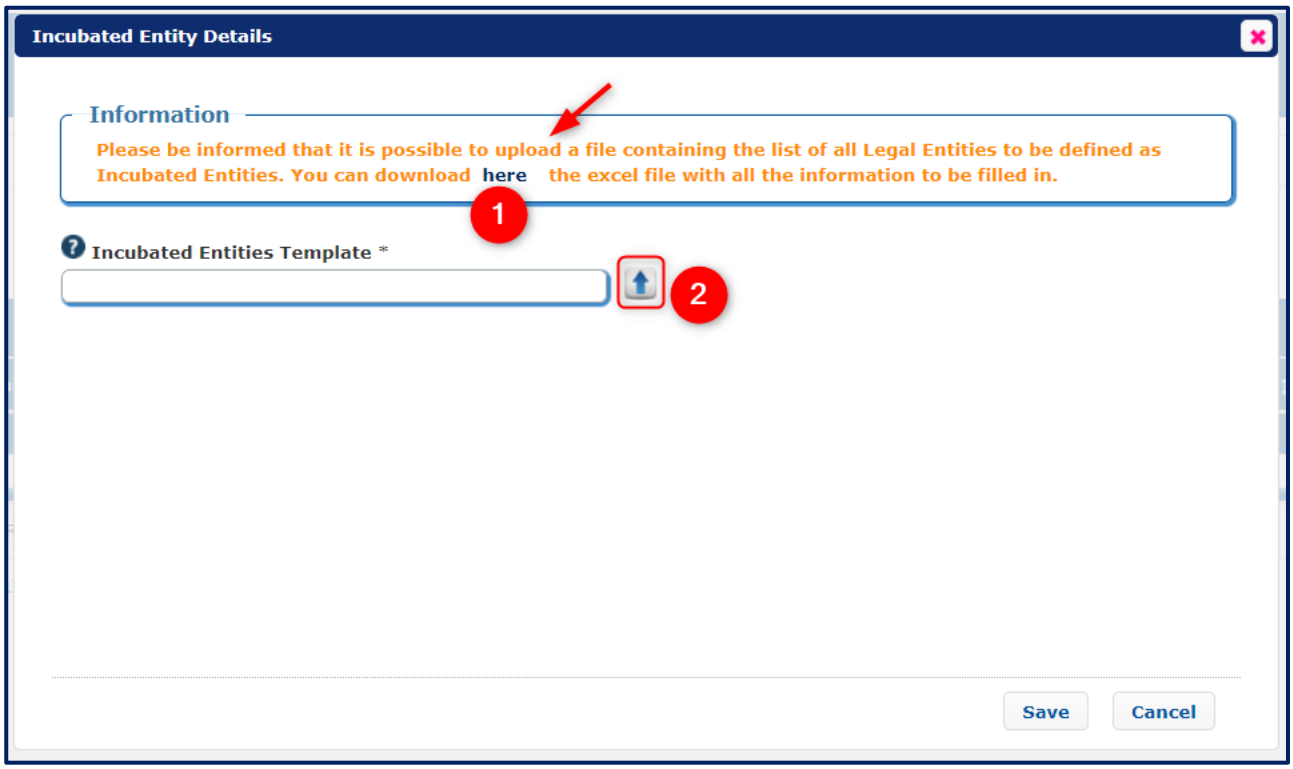

There are two possible ways to create the 'Incubated Entities List':

1) By adding each Entity in the list as follows:
   - Click on the '+' icon as shown above
   - In the pop-up window that appears, fill in the mandatory information (marked with *)
   - Click on the '?' icon (1) for information on each field
   - Click on '*Save*' (2)




2) By adding multiple Entities at the same time by clicking on the 'Import in Excel' icon



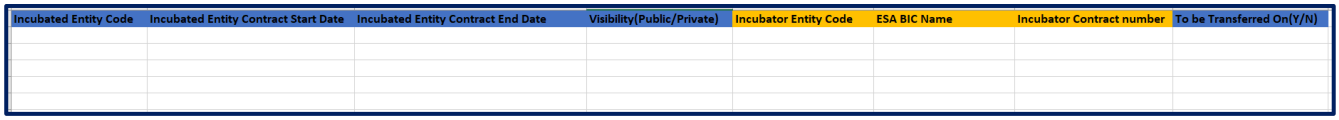



A pop-up will appear where you can:

(1) Download an Excel file showing the required information

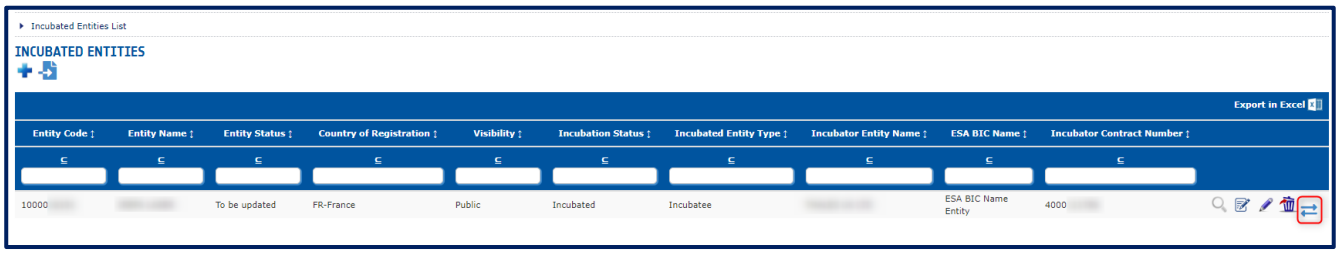
(2) Upload the Excel file with all the Incubated Entities' details

Please note that to ensure that the information is loaded into the system correctly, you should fill in the requested information in the Excel file without modifying the columns or titles.

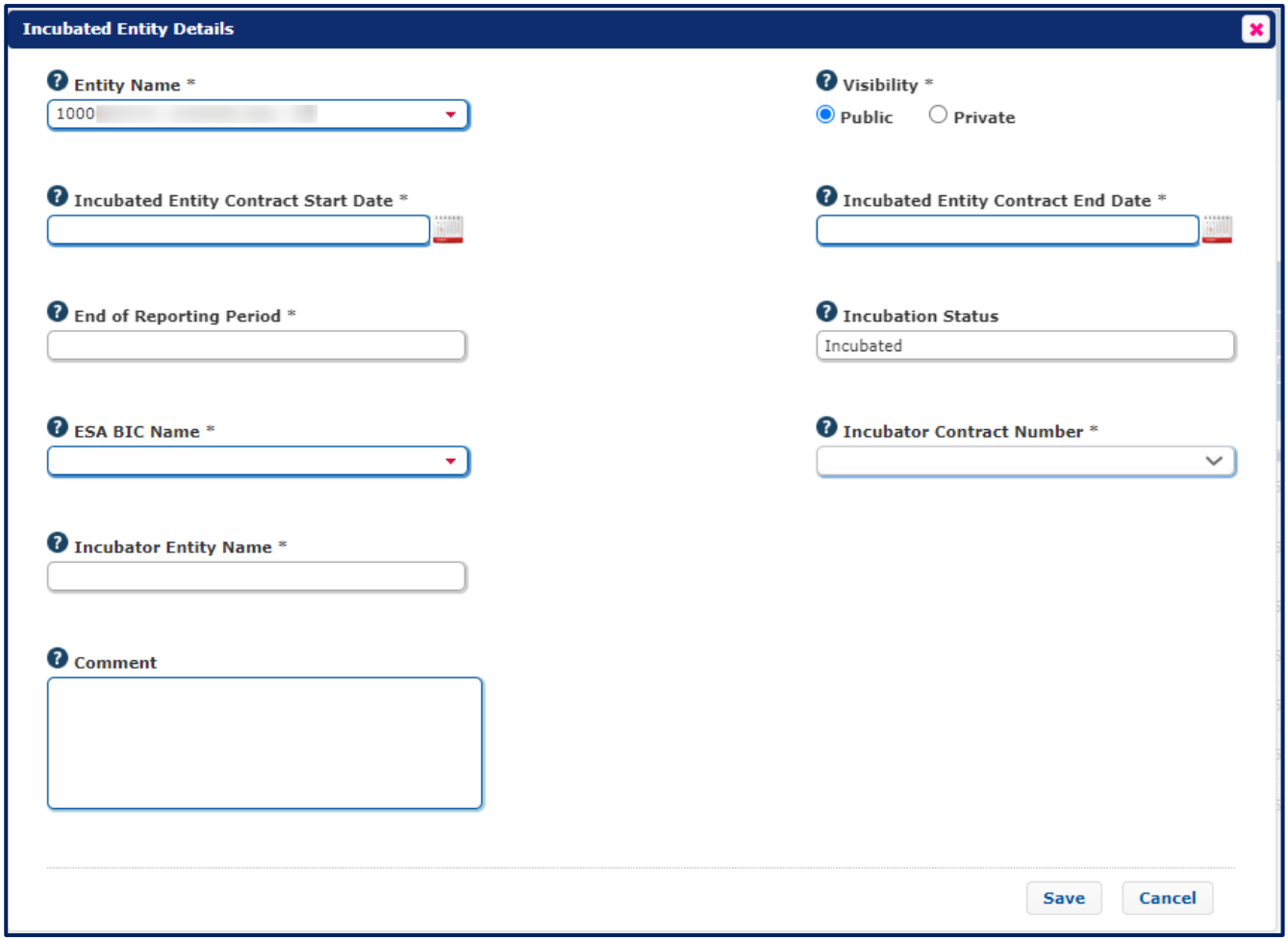



Once the Excel file is ready, you can upload it in the relevant section.

As soon as the system uploads all the Incubated Entities, you will receive an email either confirming that the upload has been successful and how many Entities were added, or that the upload was not successful with details on the error.

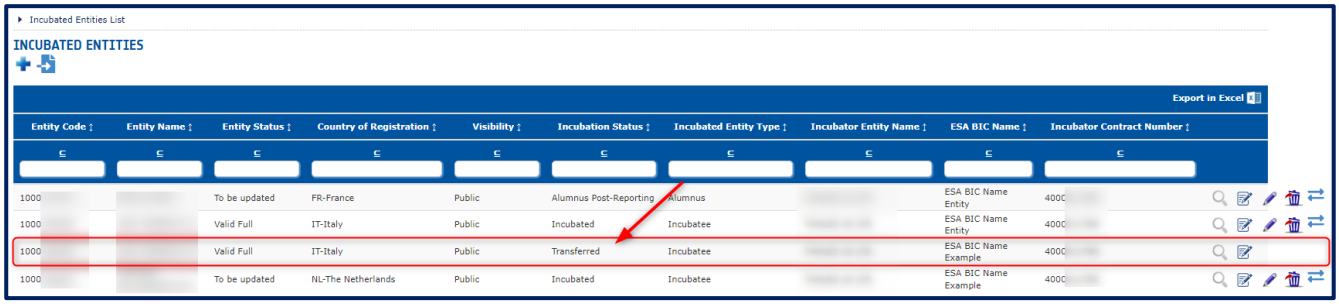



If required, you can transfer an Incubated Entity to another ESA BIC Contract and/or to another ESA BIC Name by using the “Transfer” function.




A pop-up will appear which is the same as the window for creating an Incubated Entity. Insert the mandatory information (marked with *). Click on ‘Save’ to transfer the Incubated Entity to the new Incubator Entity.

Once the entity has been transferred, it will be visible in the list in read-only mode with the status set to “Transferred”.




It is also possible to transfer an Incubated Entity in the upload Excel file by entering ‘Yes’ in the “To be Transferred” column.

