End-User Documentation

NIPEZ Portal

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1. Introduction

- Brief Description of the NIPEZ Portal:

  The portal is used for user management of economic entities, users, and their permissions, including integration with external systems. The system also provides centralized authentication and authorization services.

- Target Audience of the Documentation:

  This documentation is intended for users of external systems (requesters and suppliers within external systems, as well as entity administrators).
  Chapters describing procedures for key use cases are marked in the Table of Contents with an asterisk (*) and bold text.

- System Requirements:

  - Hardware Requirements:
    Minimum screen resolution of 1366 × 768 pixels. A quad-core processor with a clock speed of 1.6 GHz or higher, 2 GB of RAM dedicated to the browser, and a network connection of at least 10 Mbit/s.

  - Software Requirements:
    The NIPEZ application is officially supported only on manufacturer-supported desktop versions of MS Windows and Apple macOS. Proper functionality on other operating systems is not guaranteed.

  - Supported Browsers:
    The NIPEZ portal is officially supported only in the latest versions of Microsoft Edge, Google Chrome, Mozilla Firefox, and Safari. Proper functionality in other browsers or older versions is not guaranteed.

2. Portal Access

- Portal Reference Environment:
  https://idm-ref.nipez.cz/

- Portal Production Environment:
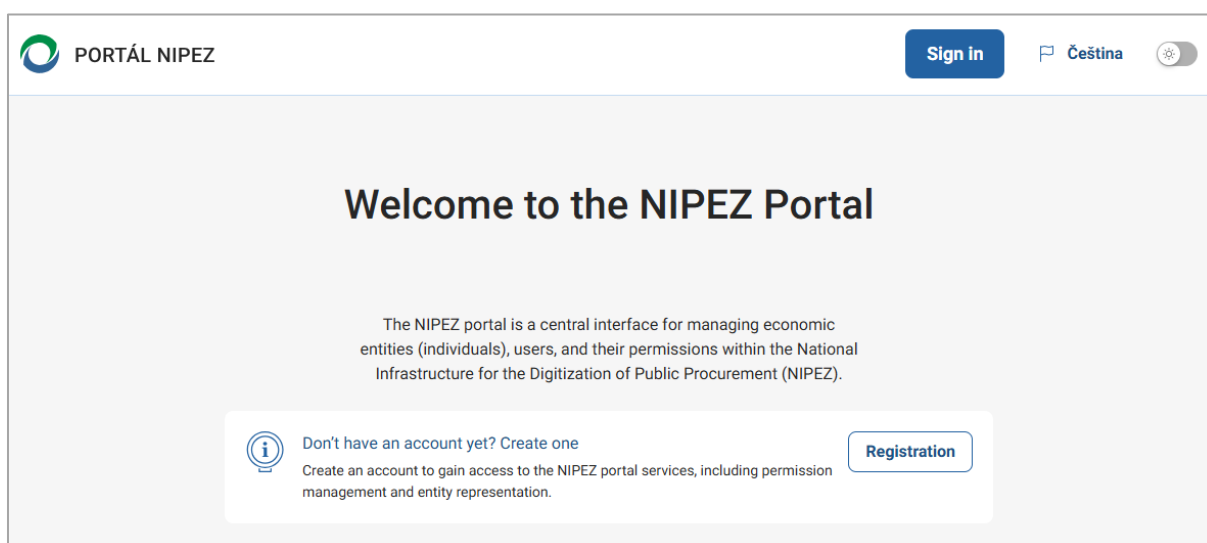 **https://idm.nipez.cz/**

Figure 1 - Home screen

- **Registration** – When visiting the portal for the first time, the user creates an account by clicking the "Registration" button in the center of the screen.

- **Sign In** – A registered user logs in to the portal by clicking the "Sign In" button in the upper-right corner of the screen.

3. User Registration

To access the NIPEZ portal, a new user must register by clicking the "**Register**" button on the home screen *(Figure 1)*.

On the screen, the user selects one of the available registration methods *(Figure 2)*:

- Registration of a czech or EU citizen (using NIA)

- Registration of an official entity (using CAAIS)
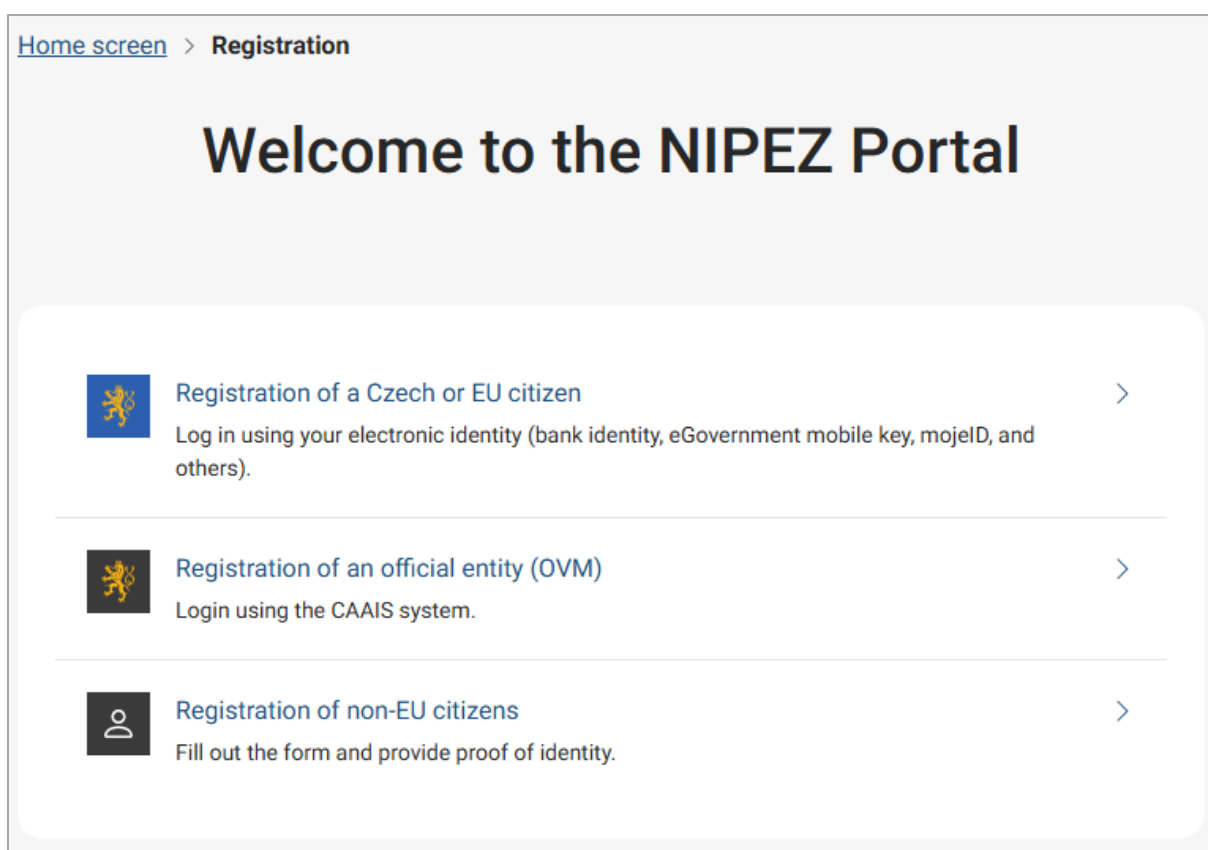
- Registration of a non-EU citizen

Figure 2 - Registration screen

3.1. Registration Using NIA

When registering using NIA, the user is presented with a list of login options divided into three tabs: "**State resources**" *(Figure 3)*, "**Bank identity**" *(Figure 4)* and "**MojeID a I.CA Identita**" *(Figure 5)*.

Figure 3 - Login via State resources

Figure 4 - Login via Bank identity

Figure 5 - Login via MojeID a I.CA identita

After logging in, the user gives consent to share the following data with the qualified provider. (Consent can be granted either on a **one-time** or **permanent** basis) *(Figure 6)*.

Figure 6 - Consent for the sharing of personal data

After this, the user is taken to the "**Complete Registration**" form. Here, they enter their phone number and email address and click "**Submit**".(If any field is already filled in, the information is automatically provided from the NIA.) The user can also choose to go back to the login page at any time *(Figure 7)*.

Figure 7 - Complete registration form

The system displays the "Data verification" message *(Figure 8)* informing the user that an email has been sent to verify the applicant's email address. The verification process is completed by clicking the link in the email. *(Figure 9)*.
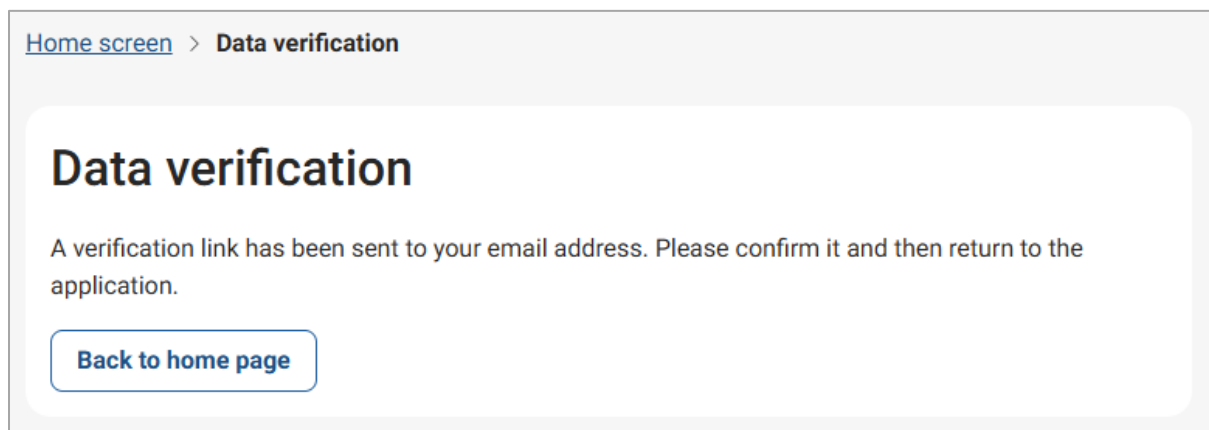

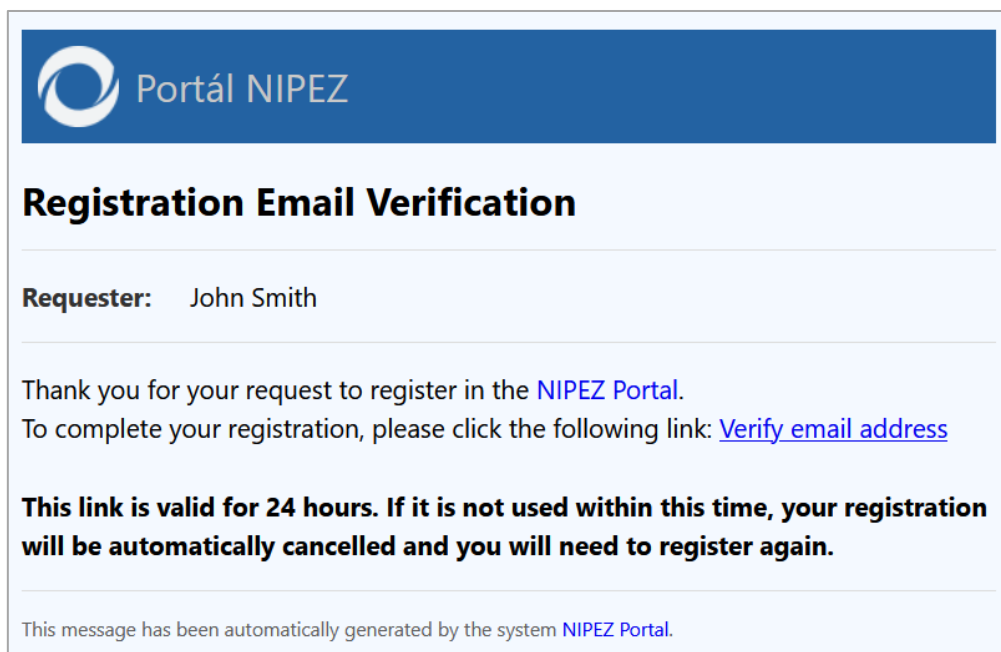*Figure 8 - Message: Data verification*

Figure 9 - Registration email verification notification

After the email is verified, the website will display the message "Successfully Verified" *(Figure 10)*.
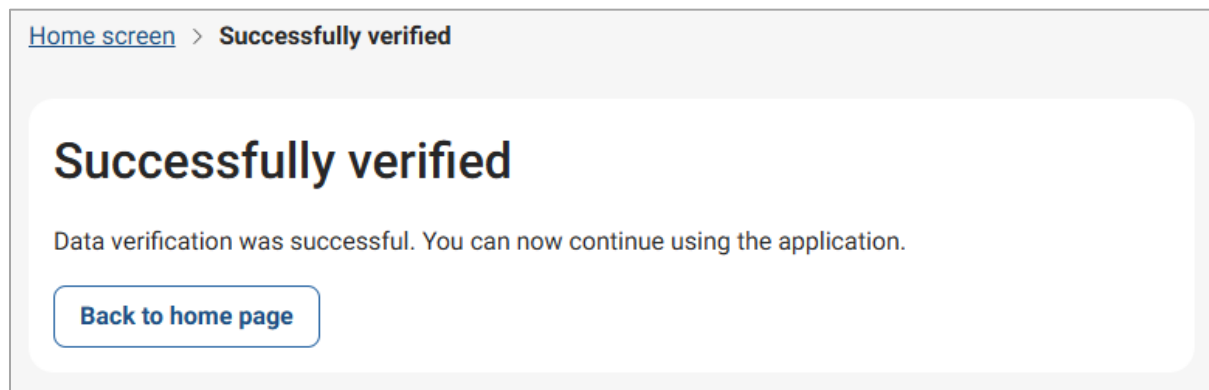

Figure 10 - Message: Successfully verified

The system then sends an email confirming the completion of the registration *(Figure 11)*:
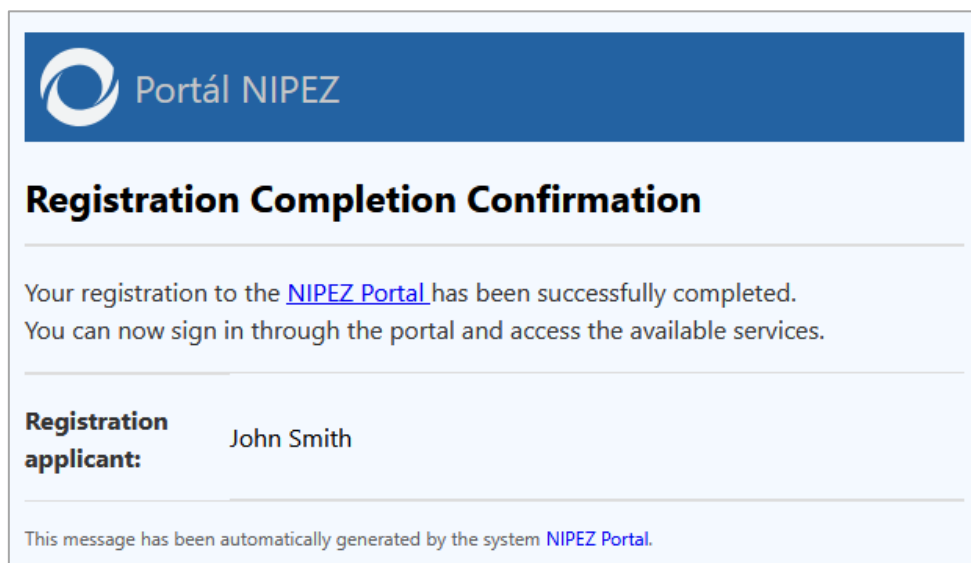

Figure 11 – Email notification confirming the completion of the registration

4. Signing In and Using the Portal

On the home screen, the "**Sign In**" button is located in the top right corner. Clicking it allows the user to select one of the available sign-in options on the login page *(Figure 12)*:

- Login for a Czech or EU citizen (using electronic identity)

- Login for an official entity (using CAAIS system)
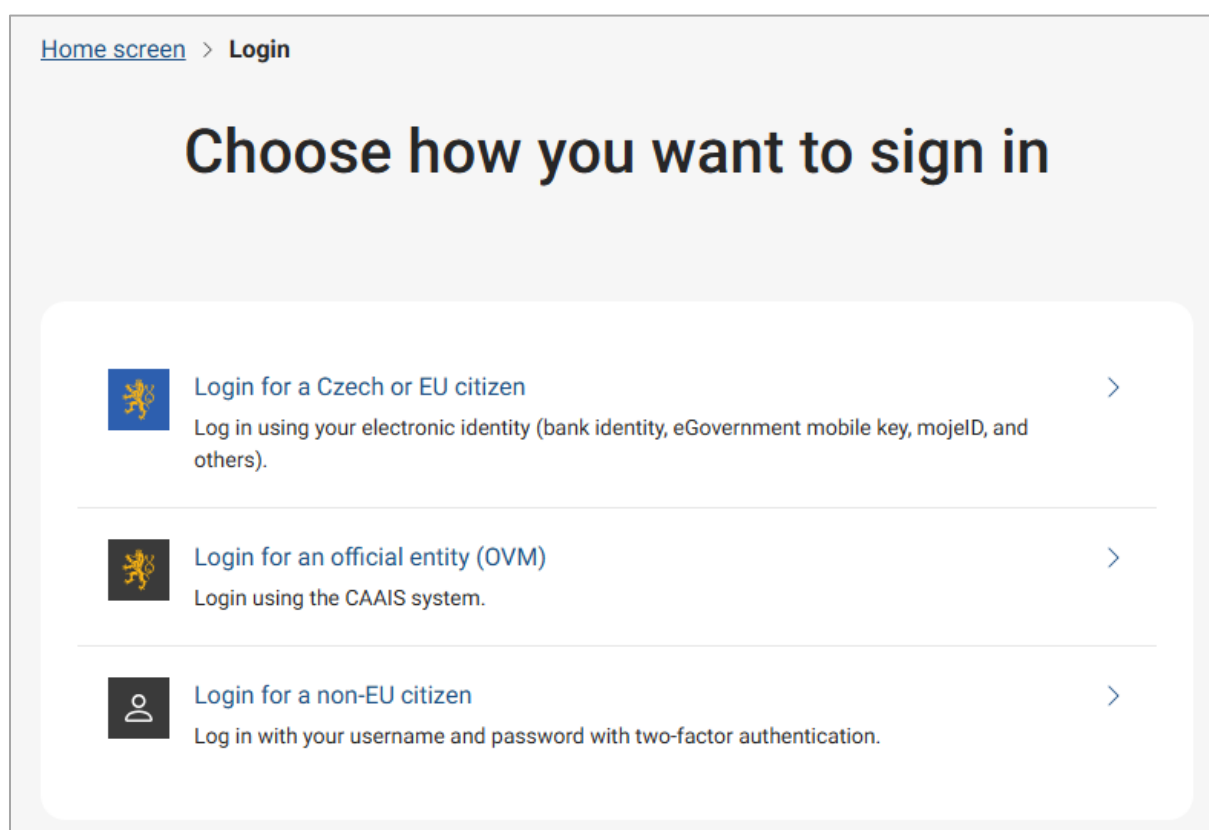
- Login for a non-EU citizen

Home screen > **Login**

Choose how you want to sign in

Login for a Czech or EU citizen
Log in using your electronic identity (bank identity, eGovernment mobile key, mojeID, and others).

Login for an official entity (OVM)
Login using the CAAIS system.

Login for a non-EU citizen
Log in with your username and password with two-factor authentication.

Figure 12 - Login page

Signing in to the Portal works the same way as during registration: The user selects a sign-in method ("State resources," "Bank identity," or "MojeID and I.CA identity"), then confirms either a permanent or one-time consent to share their data, and is finally redirected to the **home screen of their account**. *(Figure 13)*.

5. Signing In and User Profile Management

Within their account, the user can view and **edit personal information**, **deactivate the account**, create and manage **entities** and **permissions**, and **review submitted requests**.
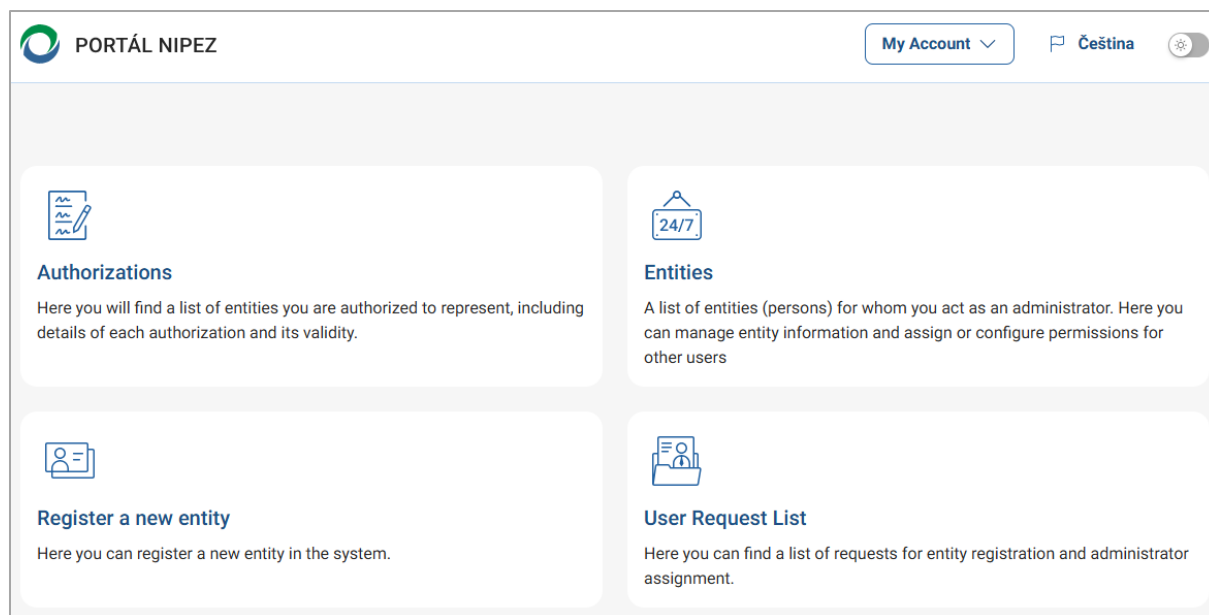

Figure 13 – Home screen of the user profile

5.1. Viewing and Editing Personal Details

To view or edit personal details, the user opens the "**My Account**" drop-down menu in the top navigation bar and clicks the "**User Information**" button. On the screen, the user can see their details and, by clicking the "**Edit**" button, can modify the phone number and email fields *(Figure 14)*.

Figure 14 – Personal details

- To update the phone number, the user simply changes the value in the field and clicks the "**Edit**" button.

- To change the email address, the user updates the value and clicks the "**Edit**" button. After clicking, a dialog window appears *(Figure 15)*, informing the user that a confirmation email with a verification link was sent to the entered address *(Figure 16)*. In edit mode, the email change can be cancelled by clicking the "**Cancel email change**" button. When the user clicks the link in the confirmation email, a confirmation window is displayed and the new email address is saved.

Figure 15 - Editing user information (e-mail)

Figure 16 - Email address verification

5.2. Account Deactivation (Registration Termination)

The "**Deactivate Account**" button is located on the "**User Details**" screen. After clicking it, a confirmation window is displayed, allowing the user to either deactivate the account or cancel the process *(Figure 17)*. Account deactivation invalidates the user and all associated permissions.
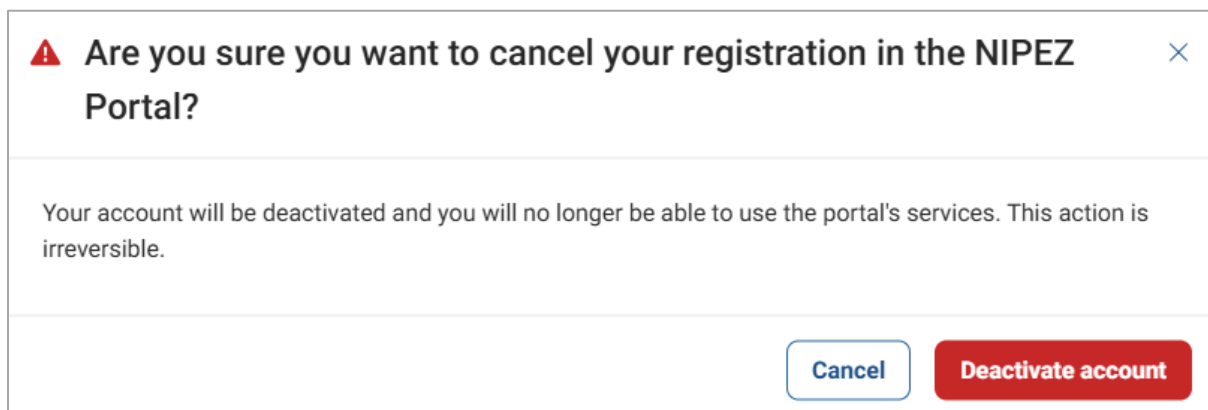

⚠ Are you sure you want to cancel your registration in the NIPEZ Portal?   ✕

Your account will be deactivated and you will no longer be able to use the portal's services. This action is irreversible.

Cancel   **Deactivate account**

Figure 17 - Account deactivation confirmation dialog

6. Managing Authorizations and Entities

6.1. Overview of My Permissions

The "**Authorizations**" tile is located in the top left corner of the home screen *(Figure 13)*. Clicking it redirects the user to the "**My Permissions**" page, which displays a list of all user permissions with search and filtering options *(Figure 18)*.

Figure 18 – My permissions

6.2. Entity Management

The "**Entities**" tile is located in the top right corner of the home screen *(Figure 13)*. Clicking it redirects the user to the "**List of Entities**" page, divided into two tabs: "**Managed Entities**" and "**Entities for Administration**" *(Figure 19)*. The "Entities for Administration" section concerns requests for the "Administrator" permission for a user and is described in Chapter 6.6. * Request to Assign an Entity Administrator (Life Situation). The "Managed Entities" section lists all entities managed by the user, for which the user can add or remove permissions.

Home screen > **List of Entities**

List of Entities

Managed entities	**Entities for administration**			
Name ⌃	**Business Identification Number**	**Legal form**	**Country**	
Brýle test	-	-	the Czech Republic	Detail
Břetislav Ostnatý	-	-	the Czech Republic	Detail
Cukr Sladký	-	-	the Czech Republic	Detail
Dolany1	-	-	the Czech Republic	Detail
Dolph Lundgren	-	-	the Czech Republic	Detail
Francois Villon	-	-	the Czech Republic	Detail
Igor Fedorchuk-opravy	00829447	Not specified	the Czech Republic	Detail
Jindra Kolomazníček	-	-	the Czech Republic	Detail
Joe Rooibos	-	-	the Czech Republic	Detail
Josef Novák	00830526	Not specified	the Czech Republic	Detail

10 ⌄ Records per page   « ‹ 1 2 3 … › »

Figure 19 – List of entities (Managed entities)

Clicking the "**Detail**" button for a specific entity opens a screen with detailed information about that entity. From this screen, you can **edit the entity's information** and **contact details**, **manage permissions**, and **deactivate the entity** *(Figure 20)*.

Figure 20 – Entity detail

- Edit: By clicking the "**Edit**" button, the details can be changed and subsequently saved *(Figure 21)*.

- Deactivate entity: by clicking the "**Deactivate Entity**" button and confirming the action in the dialog window, the user deactivates the selected entity, including all associated permissions.
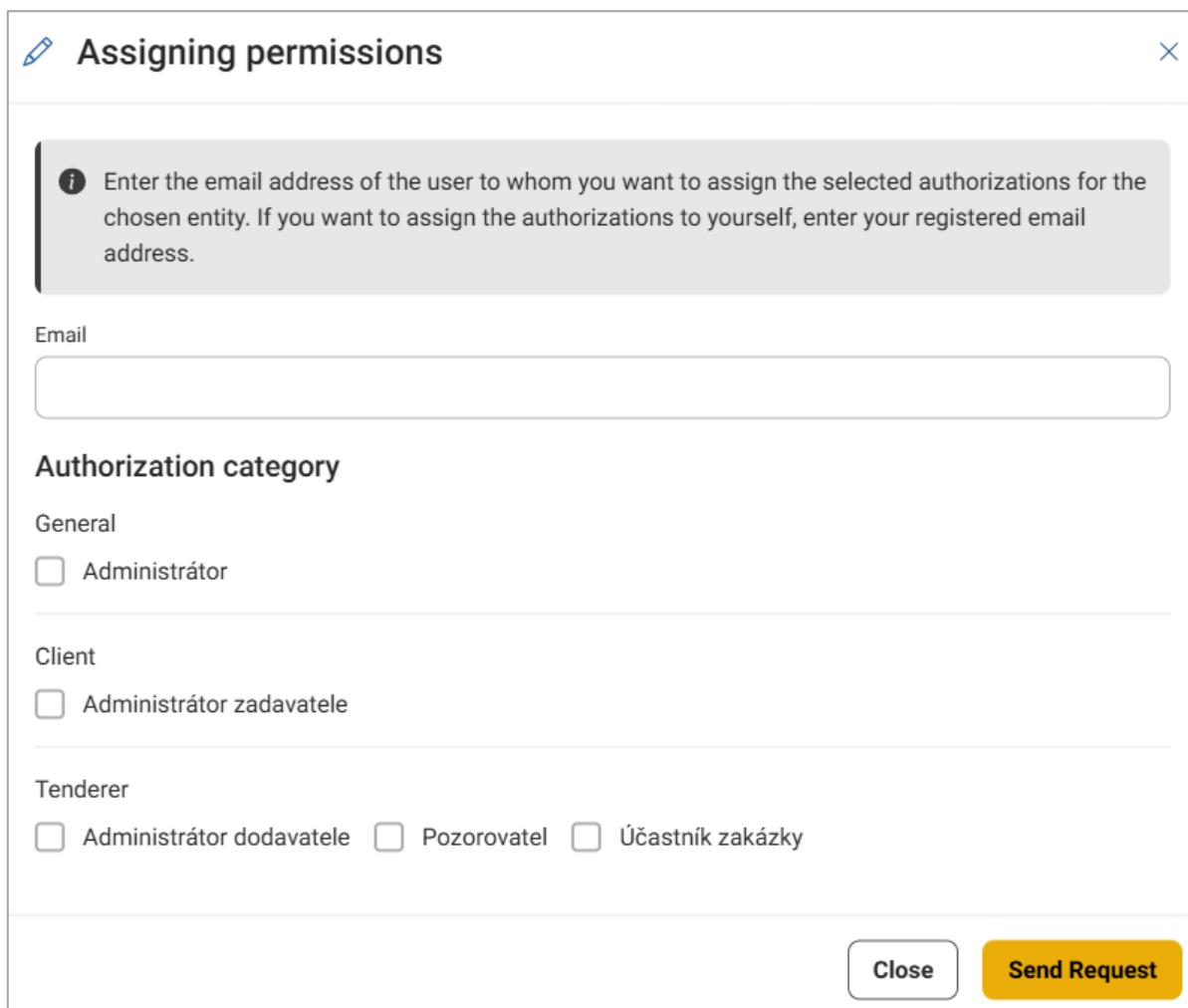
Figure 21 – Editing entity information

6.3. Managing Permissions

To manage permissions (granting and revoking), the user must have administrator permission for the entity whose permissions they want to manage. Access to permission management is available by clicking the "Entities" tile on the home screen *(Figure 13)*. A list of entities for which the user is registered as an administrator is then displayed *(Figure 19)*. From this list, the user clicks "Detail" for the selected entity *(Figure 20)*. The "Authorizations" section is divided into three tabs:

- **List of authorizations**: Here is a list of active permissions for the selected entity.

- **Permission requests**: This section contains a list of permission requests, (explained in detail in subsection 6.3.1. *Adding a Permission (Life Situation)*).

- **Authorizations for Public Contracts**: This is a list of active permissions related to public procurement.

6.3.1. *Adding a Permission (Life Situation)

A permission is added by clicking the "**Add Permission +**" button *(Figure 20)*. The user then enters the email address of the user to be assigned the permission and selects the authorization category. (If multiple options are selected, one record is created for each option.). The process is completed by clicking "**Send Request**" *(Figure 22)*.

Figure 22 - Assigning permissions

After sending the request, a notification is sent to the user depending on their Portal registration status:

If the user is already registered and has an active account, the permission is automatically approved, saved in the "**List of authorizations**", and the user receives a notification confirming that the permission has been granted.

If the email address belongs to a user who is not yet registered in the Portal, the request is saved in "**Permission Requests**" *(Figure 23)*. with the status "**Pending Registration**". The user

receives a notification asking them to register in the Portal. Once registered, the permission is automatically granted, the request is closed, and moved to the "**List of authorizations**".
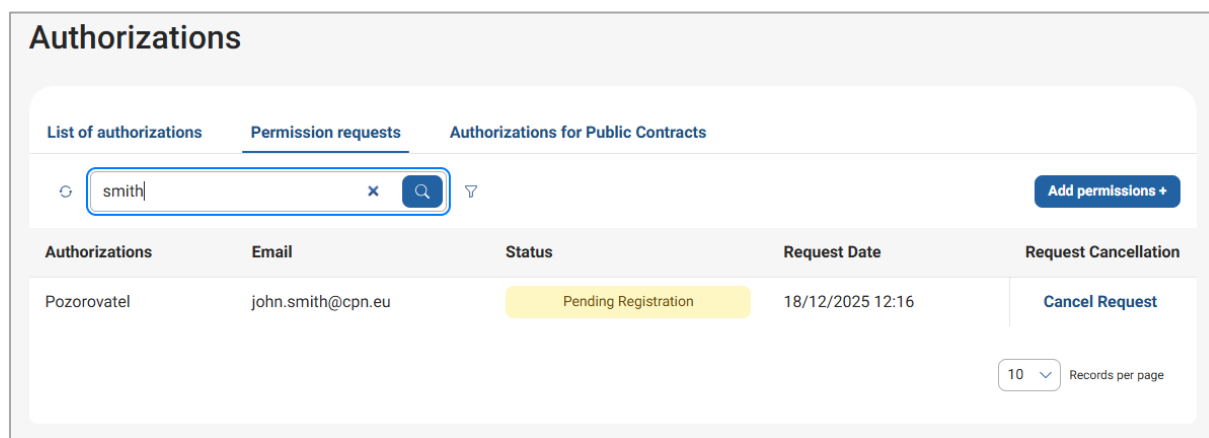

Figure 23 – Permission requests

6.3.2. *Revoking Permissions and Cancelling a Permission Request (Life Situation)

To remove an active permission from a user, click the "**Remove Permission**" button located on the right side of the relevant record in the "**List of Authorizations**" tab *(Figure 20)*. After confirming the action in the dialog window, the permission is deactivated and deleted from the table.

To cancel a permission request, go to the "**Permission Requests**" tab and click the "**Cancel Request**" button next to the relevant record *(Figure 23)*. After confirming the action in the dialog window, the request is deleted.

6.4. *New Entity Registration (Life Situation)

From the bottom left corner of the home screen *(Figure 13)* the user can select the "**Register a new entity**" tile to view entities he is authorized to represent that are not yet registered in the Portal. (Information is retrieved from REZA (Register of Representation)). If the required entity is not displayed, it can be registered by clicking "**Register entity not listed +**" button *(Figure 24)*.

Figure 24 – New entity registration

A dialog window is displayed in which the user selects the entity type (sole proprietor, legal entity, person without ID number, or foreign entity). *(Figure 25)*.

Figure 25 – Entity type selection

After clicking the selected entity type, a multi-step form is displayed, which varies slightly depending on the entity type. In the first step, "**Basic Information**" *(Figure 26)* the difference lies in whether a Czech Company Identification Number (IČO) , a foreign identification number, or no identification number at all needs to be provided. For entities with a Czech Company Identification Number (IČO) whose data are retrieved from RES (Register of Economic Entities), the "Evidence of entity existence" *(Figure 27)* step is omitted. In general, however, all required information must be completed and the necessary attachments uploaded in each step *(Figure 28)* following the instructions provided by the form.

The "**Authorizations**" section contains an automatically generated request for administrator permission for the entity registration founder *(Figure 29)*. Additional permission requests can be created at this stage using the same process described in 6.3.1. *Adding a Permission (Life Situation).

In the "**Summary**" step, all entered information must be reviewed and the request submitted by clicking the "**Register**" button. *(Figure 30)*

Figure 26 - Entity registration (Basic information for sole proprietor / legal entity)

Figure 27 - Entity registration (Evidence of entity existence)

Figure 28 - Entity registration (Authorization to represent)

| 1 Basic information | 2 Evidence of entity existence | 3 Authorization to represent | 4 Authorizations | 5 Summary |

ℹ As part of the entity registration, you are automatically assigned general permissions for entity administration within the Portal NIPEZ. To obtain additional client or tenderer permissions, assign them using the 'Add permissions' function.

Search in all columns 🔍 ▽   Add permissions +

Email	Authorizations	Status	Request Cancellation
zdenek.znamka@test.cz	Administrátor	Draft	

10 ⌄ Records per page

← Back   💾 Save for later   Next →

Figure 29 - Entity registration (Authorizations)

Figure 30 - Entity registration (Summary)

(All unfinished requests saved for later are available in the "**User Request List**" tile in the "**Draft registration requests**" form. Further details about this form are described in Chapter 6.5. User Request List).

6.4.1. Registration Supplementation

If the NEN operator (request approver) needs the user (request submitter) to add a document or a comment, the request is returned to the user. The user is notified by email to supplement the registration requests *(Figure 31)*.
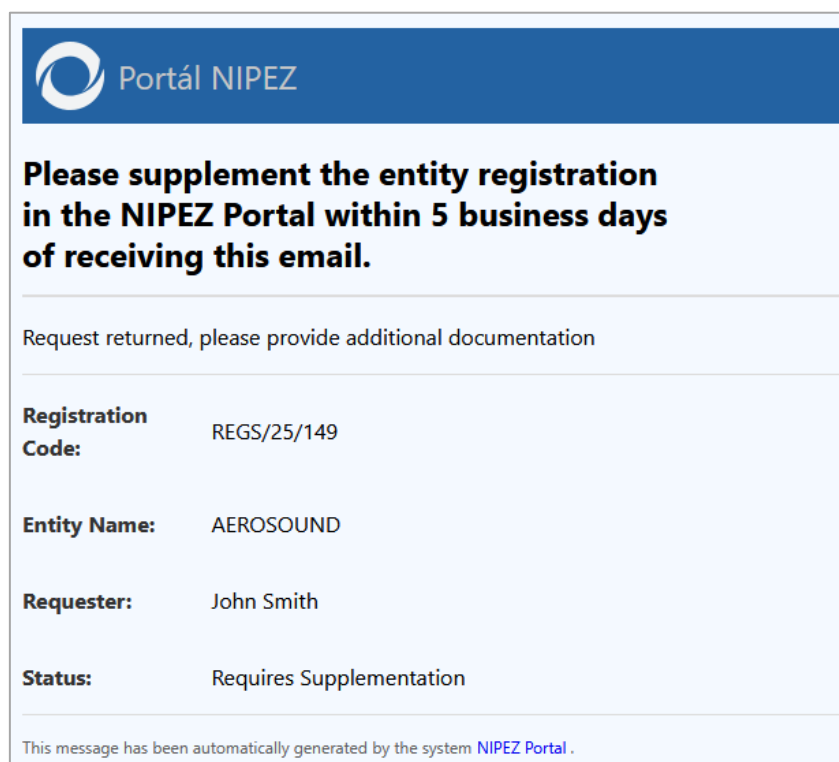

Figure 31 - Email notification to supplement the registration

To supplement the registration in the Portal, the request is located under the "**Submitted Registration Requests**" tab (on the home screen *(Figure 13)*, the "**User Request List**" tile is selected). The request is in the "Requires Supplementation" status, and a "Add information" button is displayed instead of the "Detail" button. This button is selected.

The registration form is opened in the same manner as during the initial registration, with the only difference being that the "**Complete the Registration**" button (*Figure 32*) is newly displayed in the request header.

Figure 32 – Registration supplementation

After clicking the button, a dialog window is displayed where the user can view the approver's comment and add their own comment or upload an attachment. Once the additions are made, the user checks the box to confirm sending the request back for review and clicks "**Submit changes**" (After submitting, the user retains permanent access to the communication in the request details via the button, which at that time is labeled "Registration details".)

6.5. User Request List

By clicking the "**User Request List**" tile located in the bottom right corner of the home screen *(Figure 13)* the user is taken to a screen containing three tabbed forms: " **Administrator appointment requests for an entity**", "**Submitted Registration Requests**", and "**Draft Registration Requests**".

- „Administrator appointment requests for an entity": This tab displays all requests submitted by the user to be appointed as an entity administrator. Each record shows *(Figure 33)* basic entity information, the **request status**, and a link to **view request details.** Detailed information about administrator appointment is provided in Chapter 6.6. *Request to Assign an Entity Administrator (Life Situation).

Figure 33 - Administrator appointment requests for an entity

- „Submitted Registration Requests": This section lists all entity registration requests submitted by the user for approval after clicking "Register.".

  Each entry shows basic entity details *(Figure 34)* the current request **status**, and options to **cancel the request**, view **request details** (redirecting to the non-editable "Entity Registration" form), and **supplement the information** by clicking "**Add Information**".

  This option is available when the approver returns the request and requests additional information. The detailed procedure is described in Chapter 6.4.1 Registration Supplementation.

Figure 34 - Submitted Registration Requests

- „Draft registration requests": This form lists entity registration requests that have not yet been submitted via the "Register" button and were saved for later *(Figure 35)*. The user can return to the "Entity Registration" form by clicking "**Details**" to complete the registration, or delete the record by clicking "**Cancel Request**".

Figure 35 - Draft registration requests

6.6. *Request to Assign an Entity Administrator (Life Situation)

When a user needs administrative rights for an entity that is already registered in the system, administrator permission is required. If no administrator is assigned to the entity, the user can request appointment as the entity administrator by clicking the "Entities" tile on the main page. *(Figure 13)*. The "Entity List" screen opens with two tabs: The "Managed Entities" tab shows entities for which the user already holds administrator permissions. The "**Entities for administration**" tab displays entities for which the user can request administrator rights. If the required entity does not appear in the list, click the button "**Request to assign an entity administrator**." *(Figure 36)*.

Figure 36 - Entities for administration

A window is displayed in which the user selects the required entity and uploads an authorization to represent the entity as an attachment, then clicks "**Send Request**" *(Figure 37)*.

Figure 37 - Request to assign an entity administrator

After submitting the request, the user is redirected to the "User Request List" screen, under the "**Administrator appointment requests for an entity**" tab, where they can see a list of their requests. The status of each request is displayed. At this point, the request status is "**In Progress**", which means that the request is currently being reviewed by the NEN administrator, who will either approve or reject it *(Figure 33)*.

If the request is approved, the status changes to "**Approved**" and a new record is created in the "**Managed entities**" form, located under the Entities *(Figure 19)*.

7. General Features

7.1. Filtering Records and Advanced Filtering

- The filter is used to search for records that contain the specified text *(Figure 38)*. The search can be performed using a **whole word**, **part of a word**, or **individual characters**. The search is case-insensitive and is performed across all columns. After entering the search term, the user presses the Enter key or clicks the magnifying glass icon. To display all records, the user clears the field and presses Enter again or clicks the magnifying glass icon.

Figure 38 - Filtering records

- The advanced filter (funnel icon) is used to **search based on data in individual columns** *(Figure 39)*. After clicking the filter icon, a window opens in which each field corresponds to a specific table column. Values can be entered into individual fields to filter the data.

Figure 39 - Advanced filtering

- The Refresh button (circular arrows icon) is used to update the data in the form.

7.2. Page Header

The header contains basic functions for settings and navigation within the Portal *(Figure 40)*. It is available on all pages, regardless of whether the user is logged in or not.

Figure 40 – Page header

- "PORTÁL NIPEZ" logo: A button that **redirects** the user **to the home page**.

- Language version: A button with a flag icon allows **switching between the Czech** and **English** versions of the portal

- Light and dark mode: A button allows **switching between light and dark mode**.

7.3. Page Footer

The page footer *(Figure 41)* displays important information:

- The "**User Support**" section includes phone and email contacts, as well as the availability of NEN operators for support.

- The "**Useful Information**" section includes links to cookie information, the personal data processing statement, and the user manual.
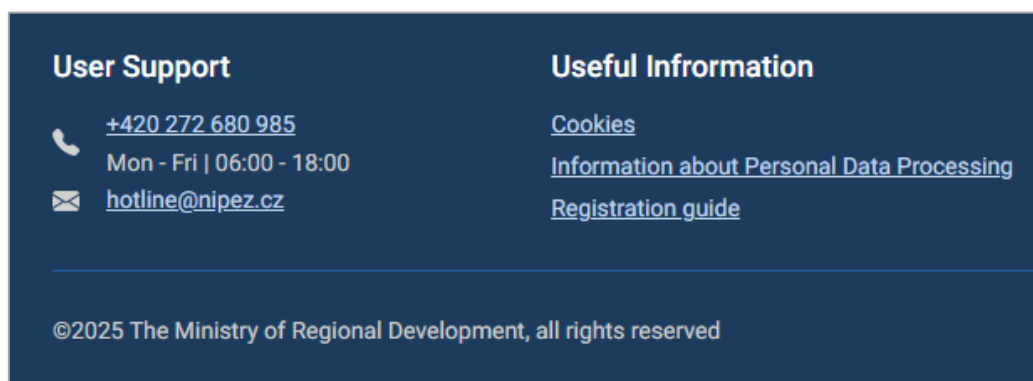

Figure 41 - Page footer

7.4. Pagination and Number of Records per Page

At the bottom of each form, there is a navigation bar *(Figure 42)* where users can choose how many records to display per page (10 to 500). The other symbols are used for page navigation: « and » go to the first and last page, < and > go to the previous and next page. Clicking a number opens that page. Clicking … opens a dropdown with all pages, allowing the user to select a specific page directly.

| 10 ⌄ | Records per page | « | ‹ | **1** | 2 | 3 | … | › | » |

Figure 42 – Navigation bar

7.5. Sorting Data in a Form Column

The headers of the forms are interactive and can be used to sort records by the selected attribute. If no attribute is selected, the default sorting is by record creation date *(Figure 43)*. Clicking an attribute allows sorting in **ascending order** (symbol ^) *(Figure 44)* or **descending order** (symbol v).

Name	Business Identification Number	Legal form	Country	Status	
DOMÁCÍ POTŘEBY PARDUBICE2	13583478	-	the Czech Republic	Rejected	Detail
Břetislav Ostnatý	-	-	the Czech Republic	Approved	Detail
PRAŽSKÁ ŠACHOVÁ AGENTURA	00829048	-	the Czech Republic	Approved	Detail

Figure 433 - Default record sorting

Name ^	Business Identification Number	Legal form	Country	Status	
00231408	00231408	-	Guernsey	Approved	Detail
Aleš Čížek	-	-	the Czech Republic	Approved	Detail
Aleš Čížek	-	-	the Czech Republic	Rejected	Detail

Figure 44 - Ascending record sorting

8. Security and Safety Recommendations

Security and Safety Recommendations – guidelines for portal login and usage:

- Never share your login credentials with other users.

- Use strong passwords – a combination of uppercase and lowercase letters, numbers, and special characters.

- If two-factor authentication (2FA) is available, we recommend enabling it.

- Make sure you are registering over a secure connection (HTTPS and a lock icon in the browser).

- Any suspected unauthorized registration must be reported to technical support immediately.

- Always log out of the portal after use, especially on public or shared devices.

- Never reply to emails asking for your username or password. They may be phishing emails.