Procurement Management Support System – PMSS

User Guide

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Introduction

NPIU was established by Ministry of Human Resource Development, Government of India, in August 1990 for coordination, facilitation, monitoring and to provide guidance to the States/ Institutions in all aspects of the projects.

Technical Education Quality Improvement Programme (TEQIP) was envisaged in 2003 as a long-term programme to be implemented in 3 phases for transformation of the technical education system with World Bank assistance. TEQIP-III is planned as a sequel to TEQIP-II which is planned as a sequel to TEQIP-I to continue the development activities initiated by TEQIP-I. Under TEQIP-II, estimate of around 200 institutions from all over the country will be selected to achieve the following objectives:

- Strengthening Institutions to produce high quality engineers for better employability
- Scaling up PG education and demand driven Research & Development and Innovation
- Establishing Centers of Excellence for focused applicable research
- Training of faculty for effective Teaching
- Enhancing Institutional and System Management effectiveness

To achieve the objectives of the programme, the institutions will be funded for various activities covered under the programme by the World Bank through the Government of India. Substantial portion of these funds will be used to procure various good, services, and works (civil works) by the participating institutions. All procurement under the TEQIP-III programme will be carried out in accordance with the World Bank guidelines, failing which, could result in penalties.

The PMSS will be used to support and monitor the procurement activities of the institutions, which are selected for the project. PMSS will help the procurement activities by reducing time, standardizing the processes, ensuring transparency, support decision making and compliance with agreed norms. Apart from the institutions, PMSS will also be used by the SPIUs and NPIU (National Project Implementation Unit) for procurement as well as monitoring activities.

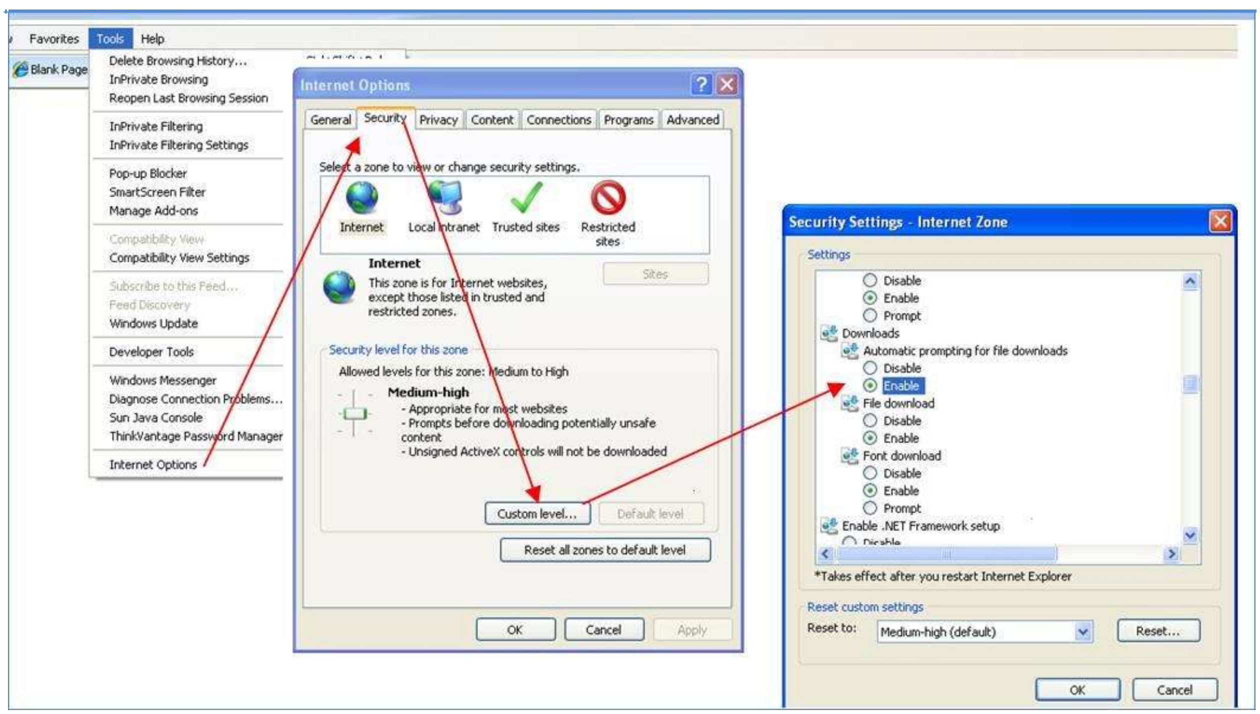
Client Software Requirement

Procurement management support system (PMSS) is a web based application. Client side software requirements of PMSS are;

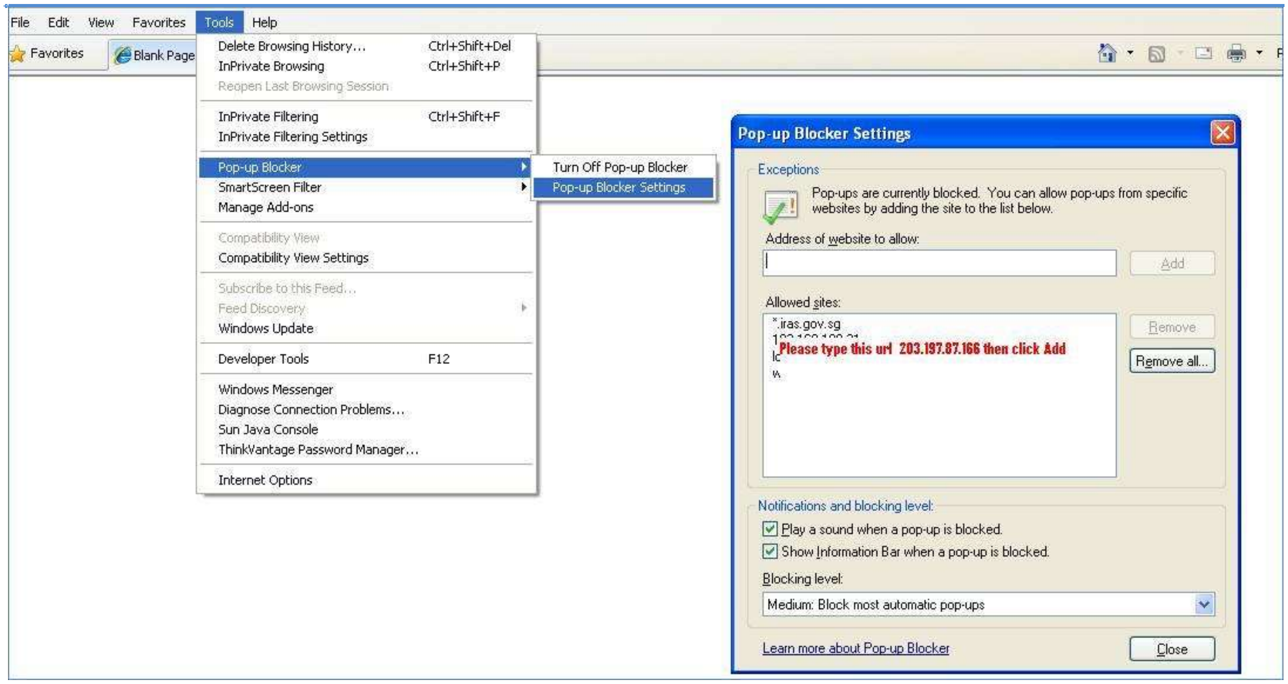
- Web browser, Internet explorer 5 and above.
- Adobe reader

Browser settings

1. Open internet explorer (IE).
2. Select option **Tools->Internet Options-> Security-> Custom Level-> Automatic Prompting for file downloads**
3. Select 'Enable'



4. Select option Tools-> Pop-up Blocker-> Pop-up Blocker Setting.
5. In the 'Address of Website to allow' field type the PMSS website url
6. Click 'Add'.


File Edit View Favorites Tools Help
Favorites
Blank Page
Delete Browsing History... Ctrl+Shift+Del
InPrivate Browsing Ctrl+Shift+P
Reopen Last Browsing Session
InPrivate Filtering Ctrl+Shift+F
InPrivate Filtering Settings
Pop-up Blocker
SmartScreen Filter
Manage Add-ons
Compatibility View
Compatibility View Settings
Subscribe to this Feed...
Feed Discovery
Windows Update
Developer Tools F12
Windows Messenger
Diagnose Connection Problems...
Sun Java Console
ThinkVantage Password Manager...
Internet Options
Turn Off Pop-up Blocker
Pop-up Blocker Settings
Pop-up Blocker Settings
Exceptions
Pop-ups are currently blocked. You can allow pop-ups from specific websites by adding the site to the list below.
Address of website to allow:
Add
Allowed sites:
*.iras.gov.sg
Please type this url 203.197.87.166 then click Add
Remove
Remove all...
Notifications and blocking level:
Play a sound when a pop-up is blocked.
Show Information Bar when a pop-up is blocked.
Blocking level:
Medium: Block most automatic pop-ups
Learn more about Pop-up Blocker
Close

Chapter

1

CONFIGURATION AND SETUP

Institution - Configuration

Home Page

Browse the following URL to access the PMSS system;

URL: www.teqip2-pmss.com/teqip3

This will display the Home Page;

Login

Fill the Login ID and Password on the home page and click  to enter into the system.

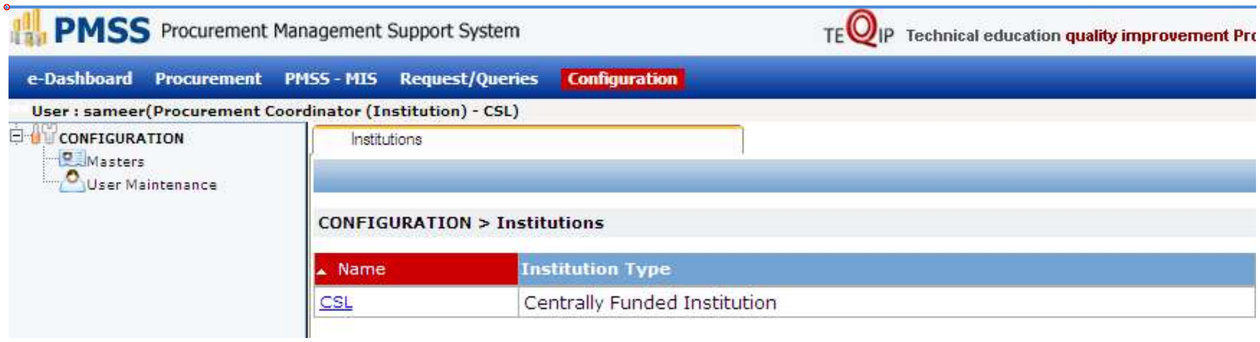
Change Password

To change the password, click on 'Change Password' link on the home page. A pop up will be seen;

Fill the Login Name, Old Password, New Password, Confirm Password. The system will indicate the success or failure of changing the password.

Configuration Module

To access the Configuration Module, click on 'Configuration'



1. Click on the institution name
2. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Address	Institution's Address	B289, Shamim Towers, Kloar Street
2	Website URL	Institution's Website URL	www.cslnit.com
3	Phone Number	Institution's Telephone Number	020 26453280
4	Fax Number	Institution's Fax Number	020 26453288
5	Email ID	Institution's email	csl@cslnit.com

3. Four subtabs can be seen in the lower section
   - Sub Component
   - Departments
   - Purchase Committee
   - Institution Logo

Sub Component

'Sub Component' is a view only tab. Sub-component(s) is configured by NPIU. Following fields can be viewed under this sub tab;

- Allocated Budget
- Budget for Procurement
- Budget for Civil Works
- Budget for Services

Departments

Departments of the Institution can be created here.

To define the Departments,

- Click on 'Add' link
- Enter Department Code
- Enter the Department name
- Enter Department Head name
- Click 'Save'

To add another Department repeat the above steps

Note: Adding at least one department is mandatory

Purchase Committee

Purchase Committee for the Institution can be created here.

To define the purchase committee;

- Click on 'Add' link
- Enter the Committee Member name
- Enter his Designation
- Enter his/ her Role In Purchase Committee
- Select the department to which this member belongs to (dropdown will list the departments created in the above Department sub tab)
- Click 'Save'

To add another Committee member repeat the above steps

Note: Adding at least three purchase committee members is mandatory

Institution Logo

Institution's logo can be uploaded here.

- Click on 'Add' link
- In the pop up browse and select the logo file
- Click 'Upload'

User Maintenance

Under this node institution user details can be seen. Select option **Configuration-> User Maintenance**

1. Click on the name of the user

2. Following details can be seen

Sr. No.	Field Name	Sample Data
1	Sanjay Matkar	Mohammed Ali Shaikh
2	First Name	Mohammed
3	Middle Name	Ali
4	Last Name	Shaikh
5	User Name	shaikh.mohammed
6	Birth Date	02/03/1978
7	Gender	Male
8	Email	shaikh.mohammed@cslnit.com
9	Phone	020-26789023
10	Address	B289, Shamim Towers, Kloar Street
11	City	Mumbai
12	Pin Code	400058
13	Role	Procurement Coordinator(Institution)
14	State	Maharashtra
15	Institution	CSL NIT

Chapter
2

PROCUREMENT PLANNING

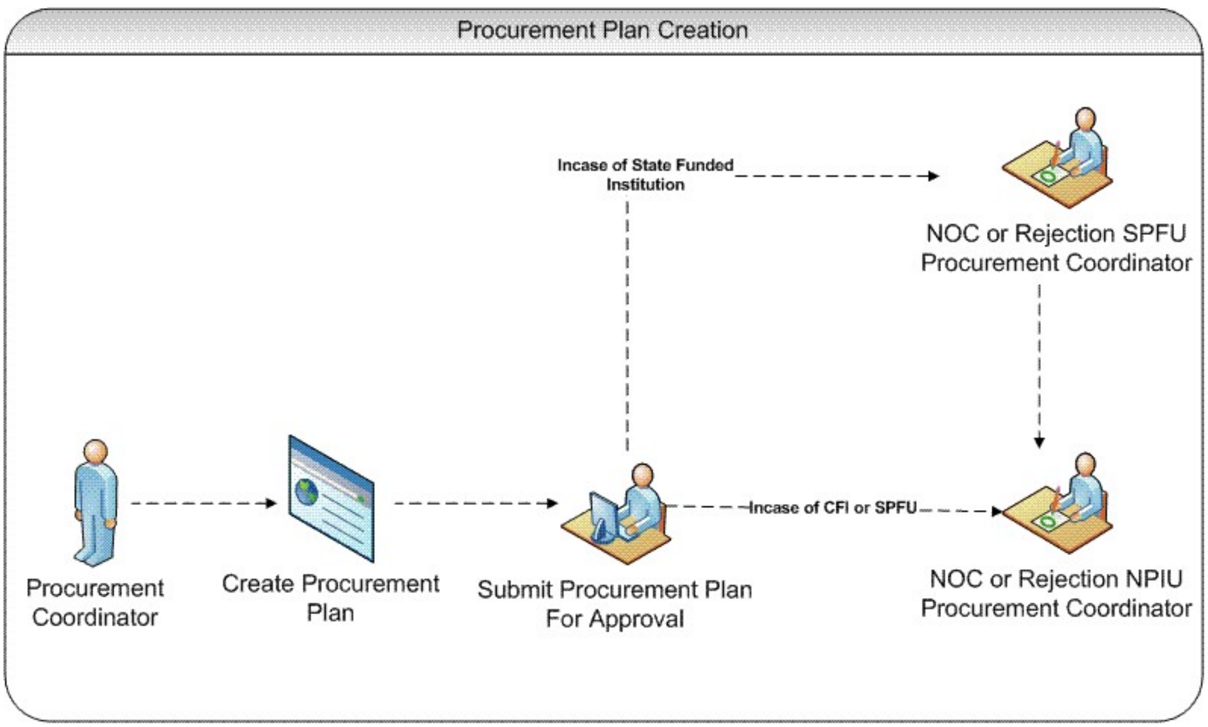
Procurement Plan Creation and Approval

Procurement Plan

Purpose

The purpose of the procurement plan is to plan and define all the procurements for the stipulated plan period. Procurement plan is the heart of the PMSS; procurements can be initiated in PMSS only when the procurement plan has been approved.

Process flow



Role(s)

- Procurement Coordinator (institution) – creates and submits the plan for approval
- Director / Head of Institution – reviews the plan
- Procurement Coordinator (SPFU) – approves the procurement plan
- Procurement Coordinator – NPIU's procurement coordinator who approves the procurement plans

Prerequisite

- Sub component(s) should have been added against the institution – Select option **Configuration-> Master-> Institutions**. Click on the institution name and check the 'Sub Components' subtab in the below section. If no sub components are added then please contact NPIU.
- Departments should be defined – Select option **Configuration-> Master-> Institutions**. Click on the institution name and check the 'Departments' subtab in the below section. If no departments are added please refer chapter 1, configuration module for adding departments.

Note: If an institution belongs to more than one subcomponent then they will see 2/ 3 plans based on the number of subcomponents that they belong to. Such institutions can create separate plans for each subcomponent. Steps to create a procurement plan are described in the section below.

Process Details

Planning process can be segregated in two parts

- Procurement Plan Creation
- Procurement Plan Approval

Procurement Plan Creation

Purpose

To create all the packages and services those are to be procured in the stipulated plan period.

Role(s)

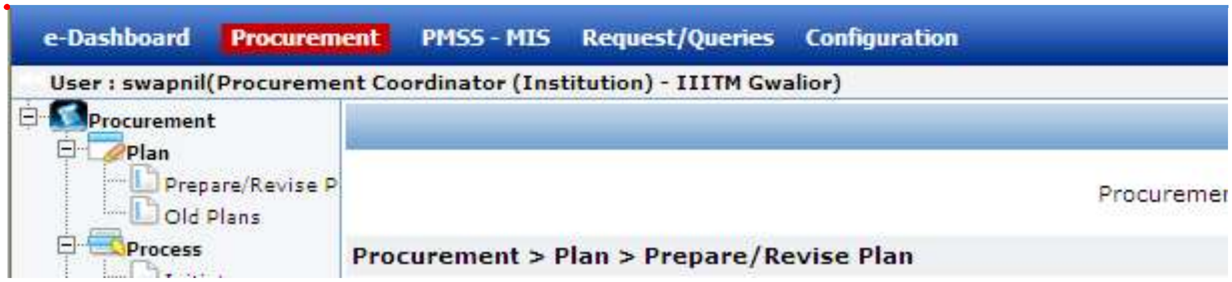
Procurement Coordinator (institution)

Prerequisite

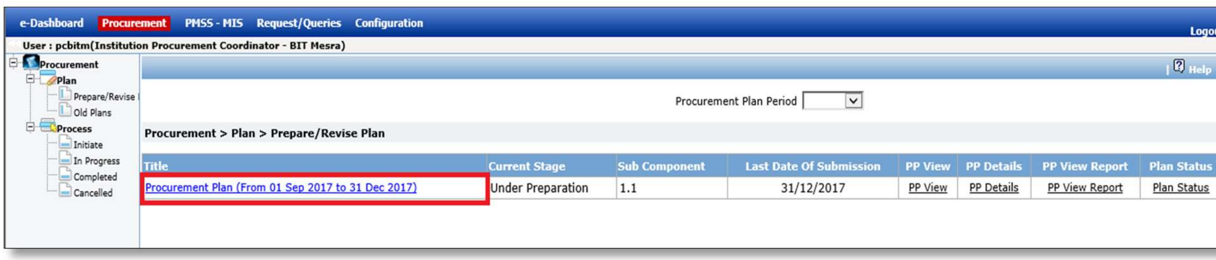
- Sub component(s) should have been added against the institution – Select option **Configuration-> Master-> Institutions**. Click on the institution name and check the 'Sub Components' subtab in the below section. If no sub components are added then please contact NPIU.
- Departments should be defined – Select option **Configuration-> Master-> Institutions**. Click on the institution name and check the 'Departments' subtab in the below section. If no departments are added please refer chapter 1, configuration module for adding departments.

Process Details

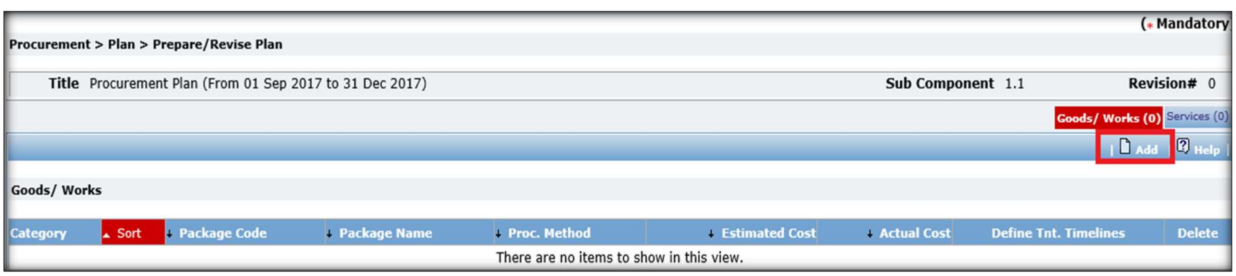
To create procurement plan, select option **Procurement-> Plan-> Prepare/ Revise Plan**



1. Click on the Procurement Plan Title, which is in the right section



2. To plan procurements of goods/ civil works; select the 'Goods/ Civil Works' tab and click on 'Add', which is within the tab.



3. A popup will appear. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Package Name	Enter Name of Package. A package is group of items to be purchased together. Items belonging to the same expenditure category (Goods, Works or Services) should be grouped together. Proprietary items should be added as separate packages. The system will refer to the package by this name.	Stationary Items

		This name will appear in bidding documents, purchase order/contracts and any other document related to procurement of this package.	
2	Description	Enter more information about the Package. The description will be displayed and can be changed at the time of actual procurement of the item. This field is not mandatory.	This includes pens, pencils and computer printing papers.
3	Category	Select Expenditure Category of the package – Goods or Civil Works. This is one of the important fields related to the package. Please note that you cannot modify the category after you save. After you select the category, 'Item Details' section will appear.	Goods
4	Sub-Category	Select Expenditure Sub-Category. This dropdown will be populated after you select the category. This is one of the important fields related to the package.	Equipments
5	Activity	Select Project Activity This dropdown will list all activities associated with the sub-component. There is a small box in front of this field. If required, Click on this box to see the complete name of the 'Activity' This is one of the important fields related to the package.	Institutional Management Capacity Enhancement
6	Is Proprietary	This checkbox will be editable only for Category "Goods" and Sub-Category "Equipments". Check the checkbox if the package is a proprietary item. This is one of the important fields related to the package.	
7	Through GEM	Check the checkbox if the package is going to be procured through GEM	
8	Estimated Financial Sanction Date	Enter date in DD/MM/YYYY format or select date using calendar. You cannot enter past Date. Please enter date on which you are expected to get internal financial sanction for procurement of this package. System will automatically calculate estimated timelines for procurement of this package based on this date. This is one of the important fields related to the package.	12/02/2011

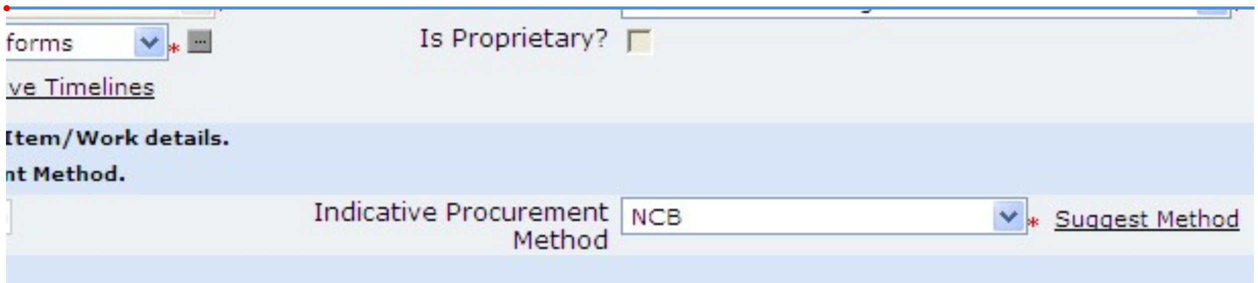
4. Adding at least one Item is mandatory. To add an Item click on the 'Add', which is in the 'Item Details' section. A row will appear where the item details can be added.

5. Fill the fields on the page. Details of the fields are mentioned below;

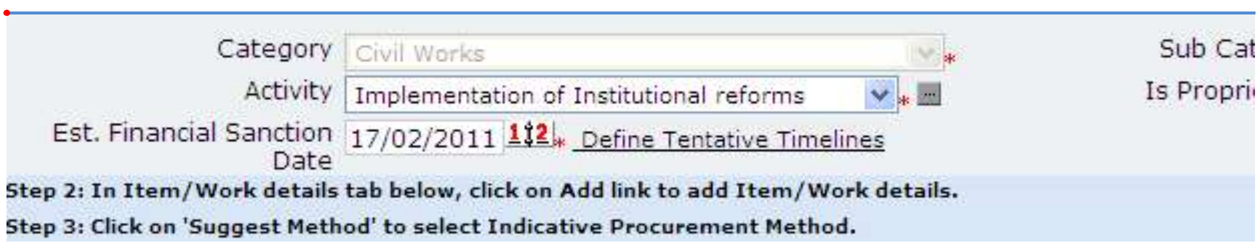
Sr. No.	Field Name	Field Description	Sample Data
1	Item Name	Enter Name of an individual Item This name will appear in bidding documents, purchase order/contracts and any other document wherever list of individual items is displayed.	Pencils
2	Description	Enter more information about the item. The description will be displayed in bidding documents, purchase order/contracts and any other document wherever list of individual items appears. This field is not mandatory.	HB Pencils
3	Quantity	Enter Quantity of the item to be procured. If the same item has been requested by multiple departments/ units within your institution, please add them and enter total quantity here. This is one of the important fields related to the item.	100
4	Est. Cost Per Unit	Enter Estimated Cost Per Unit (.e. Rate) for the item	200
5	Estimated Cost	This is a read-only field. This will get auto-calculated by the system as Quantity * Est. Cost Per Unit.	
6	Procuring Department	Select name of the department who which the item will be procured. The dropdown will display all departments in your institution and an additional item "Institution	IT

		Level”. If the item has been requested by multiple departments, select “Institution Level” from the dropdown.	

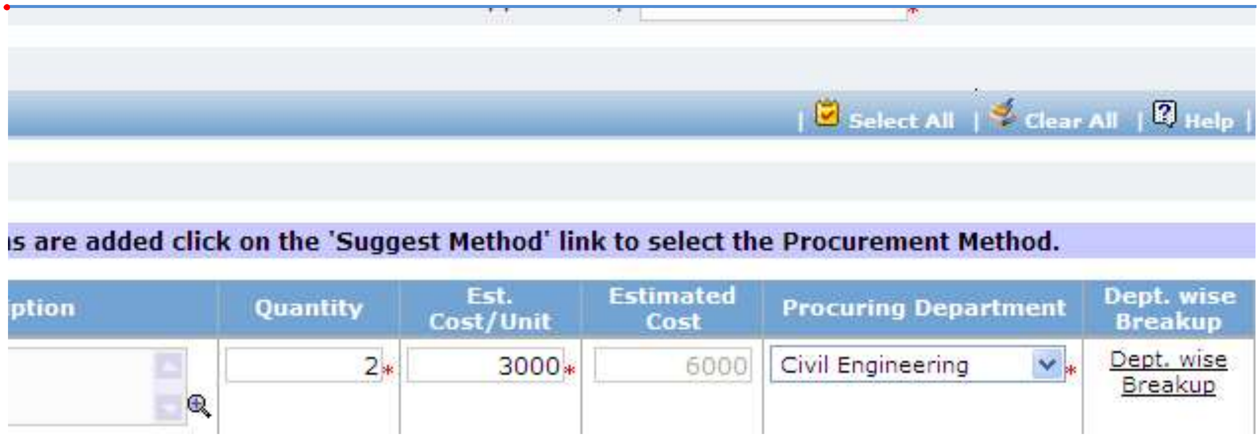
6. To add another item, repeat steps 4 and 5.
7. After adding the items, click on the ‘Suggest Methods’ link, which is in front of the ‘Indicative Procurement Method’ dropdown. This will populate the ‘Indicative Procurement Method’ dropdown. The method(s) will be populated based on the ‘Total Estimated Cost’



8. Select the appropriate method in the ‘Indicative Procurement Method’ dropdown.
9. Click ‘Save’
10. Once saved, ‘Define Tentative Timelines’ link will appear in front of Est. Financial Sanction date field. The purpose of this link is to input the estimated dates of Bid Invitation, Bid Opening, etc for that package.



11. Click on ‘Define Tentative Timelines’ link. A pop showing auto calculated dates will be seen. Edit these dates, if required.
12. For category Goods, ‘Department Wise Breakup’ link will appear against those Items which have Procuring Department as ‘Institution Level’.



13. Click on 'Dept. Wise Breakup' link.
14. Enter the Quantity of the Item being procured for the individual departments e.g. if 50 computers are being procured at Institution Level then mention the number of computers being procured for each department.
15. Click 'Save'.
16. To add another package repeat steps from 2 to 16.

Note: Department wise breakup is mandatory when procuring department is selected as 'Institution Level'.

*If you are adding a package for category **Works** then while adding items 'Quantity' is not required. Also, Department wise break up is not required for Works.*

17. To plan procurements of services; select the 'Services' tab and click on 'Add', which is within the tab

18. A popup will appear. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data

1	Service Name	Enter Name of Service to be procured. The system will refer to the package by this name. This name will appear in bidding documents, contracts and any other document related to procurement of this package.	Inventory System
2	Description	Enter more information about the Service to be procured. The description will be displayed and can be changed at the time of actual procurement. This field is not mandatory.	Service will include development of inventory application.
3	Category	This lists only one entry “Services”. Select the item from the list. This is one of the important fields related to the package.	Services
4	Sub-Category	Select Expenditure Sub-Category. This dropdown will be populated after you select the category. This is one of the important fields related to the package.	Professional Services
5	Activity	Select Project Activity This dropdown will list all activities associated with the sub-component. There is a small box in front of this field. If required, Click on this box to see the complete name of the ‘Activity’ This is one of the important fields related to the package.	Institutional Management Capacity Enhancement
6	Service Provider	This dropdown lists two items – Firms and Individual For Services which will be procured from Individual Consultant, select “Individual” from the dropdown. For Services which will be procured from Firms, select “Firm” from the dropdown.	Firms
7	Total Estimated Cost	Enter Total Estimated Cost of the service	100000
8	Indicative Procurement Method	After you enter Total Estimated Cost, System will calculate Indicative Procurement Methods applicable for the estimated cost and populate this dropdown. Select appropriate Procurement method from the list.	SSS
9	Estimated Financial Sanction Date	Enter date in DD/MM/YYYY format or select date using calendar. You cannot enter past Date. Please enter date on which you should get financial sanction for procurement of this package. System will automatically calculate estimated timelines for procurement of this package based on	12/02/2011

		this date. This is one of the important fields related to the package.	

19. Click ‘Save’
20. To add another service repeat steps from 18 to 21.
21. ‘Define Tentative Timelines’ link can be seen on the list page.

Title Procurement Plan for 18 Months (From 01 Jan 2010 to 30 Jun 2011) Sub Component 1.2 Revision# 9

Goods/ Works (71) Services (5

| Add | Delete | Hel

Services

Service Code	Service Name	Total Estimated Cost	Total Actual Cost	Define Tentative Timelines	Delete
	Test9 UAT 305	12,000.00		Define Tentative Timelines	
...I/WB/WB-kol/139	TEst8 UAT 305	120,000.00		Define Tentative Timelines	
...I/WB/WB-kol/138	Test7 UAT 305	20,000,000.00		Define Tentative Timelines	
...I/WB/WB-kol/136	Test4 UAT 305	12,000.00		Define Tentative Timelines	

22. Click on ‘Define Tentative Timelines’ link. A pop showing auto calculated dates will be seen. Edit these dates, if required.
23. After adding all the packages and services to be procured click on ‘Submit Procurement Plan’, which is on the upper bar in the right section.
24. Plan can be viewed as per the format given in the PIP. Click on PP View/ PP View Report, which is on the upper bar in the right section and also available on the list page of the plan.

Procurement Plan Approval

Purpose

To send the procurement plan for review and approval.

Role(s)

- Procurement Coordinator (institution) – submits the plan for approval
- Procurement Coordinator (SPFU) – approves the procurement plans of institutions
- Procurement Coordinator – NPIU’s procurement coordinator, approves the procurement plans of SPFUs and institutions

Prerequisite

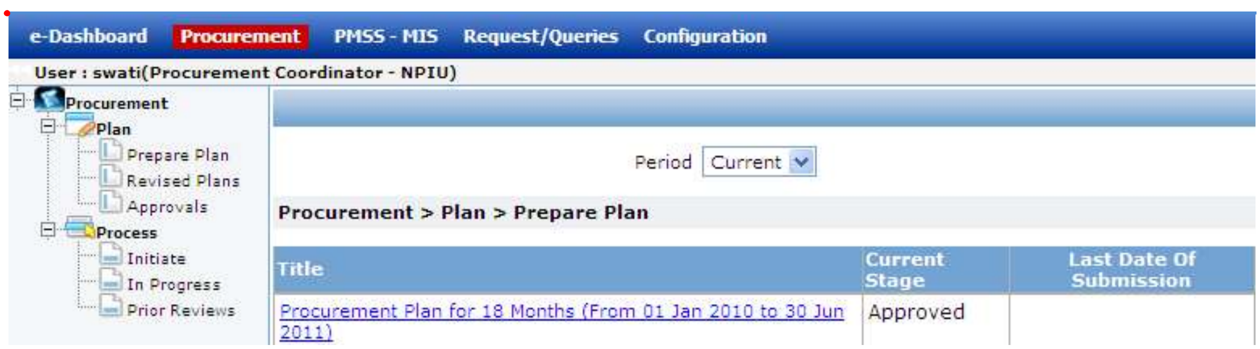
- Plan should be created completely.
- Plan should be within the allocated budget

Process Details

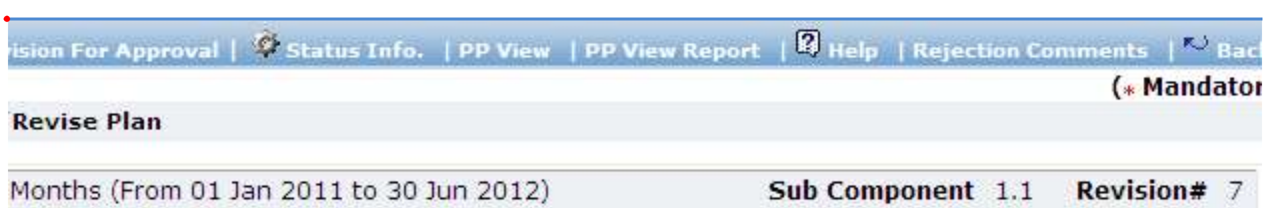
Once the procurement plan is created it has to be sent for approval. For the State Sponsored Institutions the first approval will be given by the respective state and the second approval is by NPIU. In case of Centrally Funded Institutions (CFIs) the plan is sent directly to NPIU for approval.

1. Click on '**Submit Procurement Plan**', which is on the upper bar in the right section.

2. An email pop up will be seen, click on 'Send'. This will send an email to the approving authority.
3. When the approving authority approves the plan email will be received by the institution users.
4. Once the plan is approved by all the approving authorities the status of the plan will change to 'Approved', which can be seen in the Colum after the plan title in the right section.



5. To view the approving details click on the 'Plan Status' link this will show the approval stages and comments.
6. If the plan is rejected then status of the plan will be 'Under Clarification'. Institution users will receive an email notification accordingly.
7. If rejected, click on the plan title. Then click on the 'Rejection Comments' link, which is in the upper bar in the right section and view the rejection comments.



8. Modify the plan as required and send the plan for approval again.

Chapter
3

PLAN REVISION

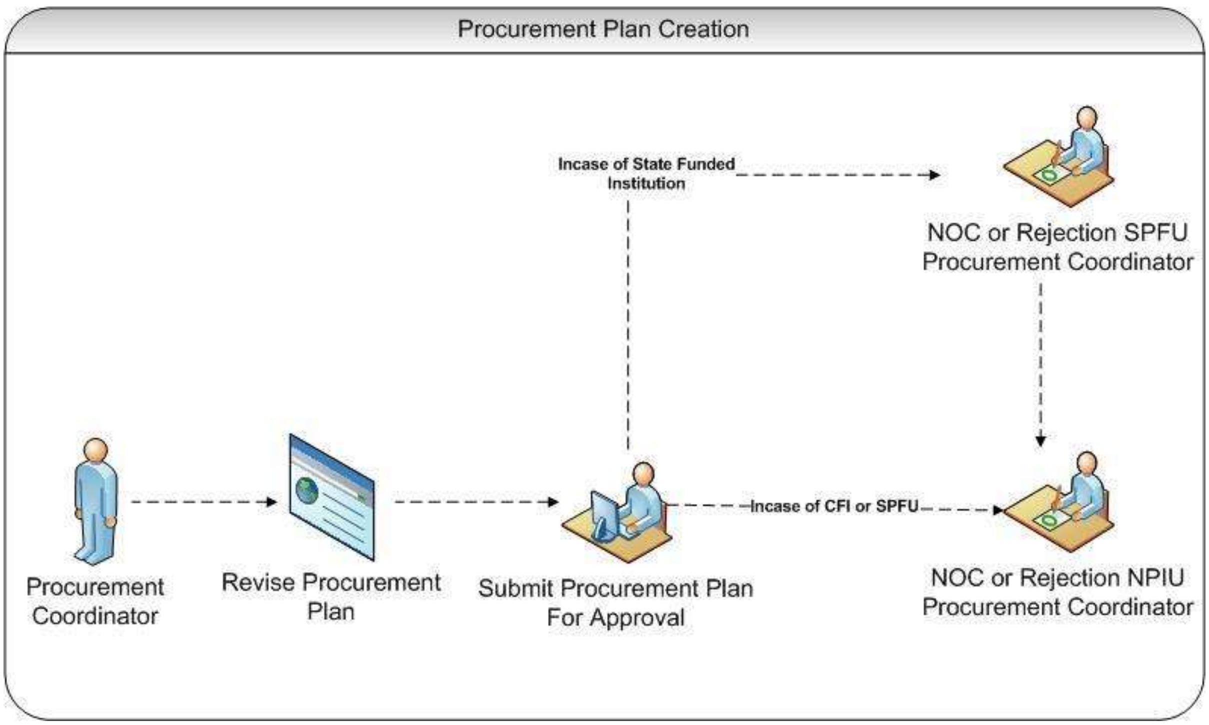
Procurement Plan Revision

Plan Revision

Purpose

The purpose of the procurement plan revision is to make changes to existing packages/ services or to add new packages/ services. Revised packages/ services can be initiated only when the revised procurement plan has been approved.

Process flow



Role(s)

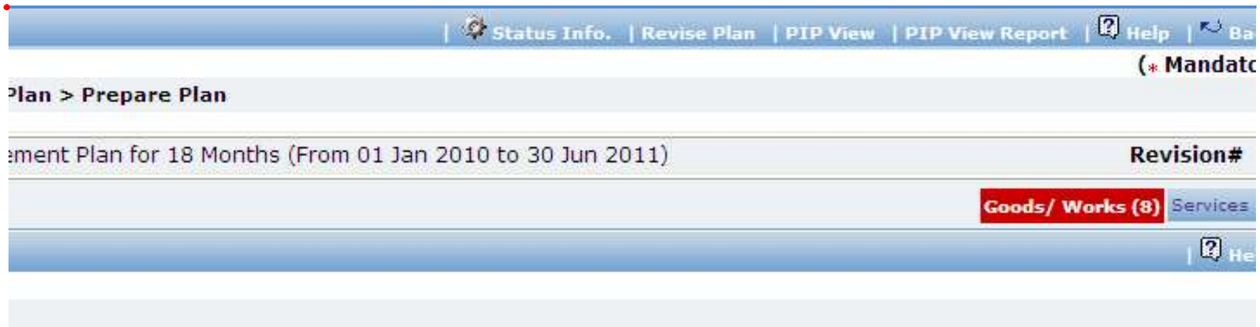
- Procurement Coordinator (institution) – revises and submits the plan for approval
- Director / Head of Institution – Approves revision when revision is within 20%.
- Procurement Coordinator (SPFU) – Approves revision when revision is within 20% - 30%.
- Procurement Coordinator – NPIU's procurement coordinator, approves revision when revision is greater than 30%.

Prerequisite

- Procurement Plan should be approved at least once.
- Procurement budget should be available.

Process Details

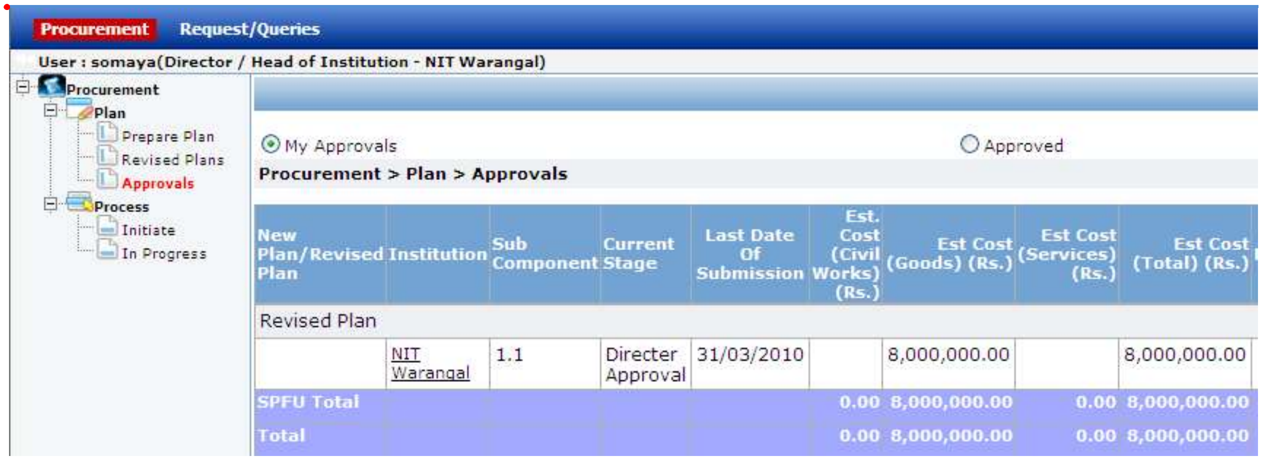
To revise the procurement plan select option **Procurement-> Plan-> Prepare/ Revise Plan.** Click on the **procurement plan title** then click '**Revise Plan**' link, which is on the upper bar of the right section.



1. Click on the package/ service that have to be revised.
2. Make the necessary changes to package/ service
3. Click 'Save'
4. To make changes to another package/ service repeat steps 1 to 3.
5. New packages/ services can also be added by following steps of adding packages/ services, as described in procurement plan creation section.
6. All the package / service, which have been revised, will be shown in a different colour.
7. To send the plan for revision approval click on 'Submit Plan for Revision Approval' link, which is on the upper bar in the right pane.
8. If the changes to the plan are within 20% then the plan will go to the Director of the institution for Approval

Note: Before sending the revised plan for approval a BOG approval should be taken manually (i.e. outside PMSS).

9. The Director can login and select option **Procurement-> Plan-> Approvals**



10. Click on the Institution Name.
11. To Approve the plan click on ‘No Objection’, which is on the upper bar in the right pane. To Reject the plan click on ‘Revise and Re-Submit’.

12. If the changes are between 20 to 30 % then, for the State Sponsored Institutions the plan will be sent to the respective state for approval. In case of Centrally Funded Institutions (CFIs) the plan is sent to NPIU for approval.
13. If Change is more than 30% then, for the State Sponsored Institutions the first approval will be given by the respective state and the second approval is by NPIU. In case of Centrally Funded Institutions (CFIs) the plan is sent directly to NPIU for approval.
14. Once the plan is approved procurements can be initiated against this approved plan.

Note: When a procurement plan is revised and sent for approval, procurements can still be initiated for those package/ service which are not revised. However, the package/ service which have been revised cannot be initiated until the procurement plan is approved.

Chapter

4

PROCUREMENTS

Procurements Process

Procurement Process

Purpose

To perform the procurement of the approved packages/ services.

Role(s)

- Procurement Coordinator (institution)
- Procurement Coordinator (SPFU) – Performs Prior review, when applicable.
- Procurement Coordinator – NPIU's procurement coordinator, Performs Prior review, when applicable.

Prerequisite

- Procurement plan should be approved

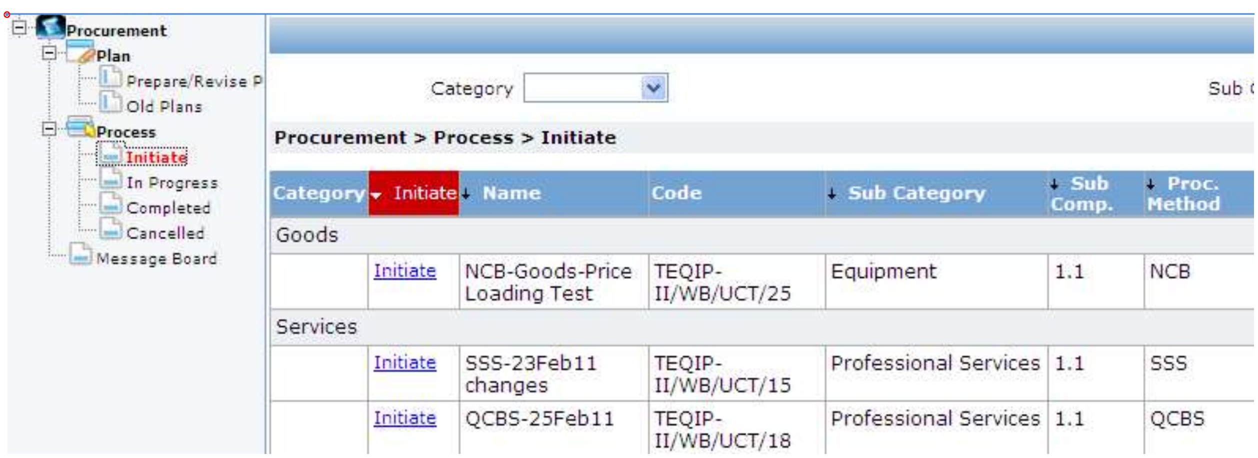
Process Details

Process node is divided into;

- Initiation
- In Progress
- Completed
- Cancelled

Initiation

Approved packages/ services are listed under **Procurement-> Process-> Initiate**



1. Click on 'Initiate' link, which is in the right section. This will initiate the procurement.

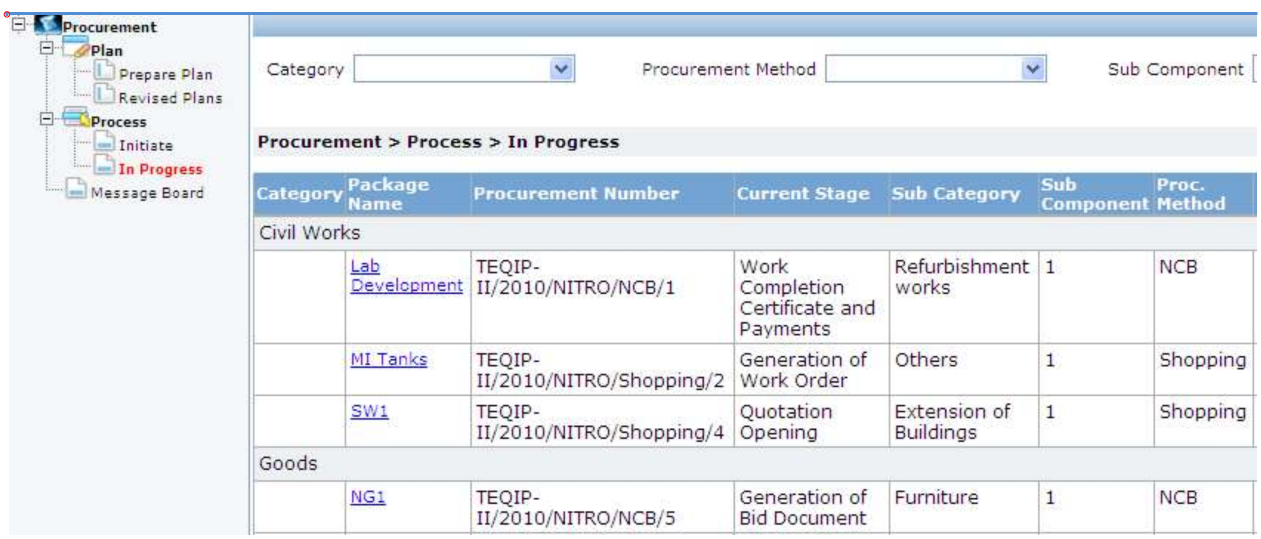
2. Fill the fields on the page

Sr. No.	Field Name	Field Description	Sample Data
1	Actual Financial Sanction Date	Enter the date in DD/MM/YYYY format. This date is the date on which procurement was sanctioned internally.	12/03/2011

3. Click 'Save'
4. 'Revise Timelines' link will appear in front of the 'Actual Financial Sanction' date field, click on the link will show a pop up. Dates in this popup will be auto populated based on the Procurement Method and Initiation date. Edit the dates, if required.
5. Click on 'Click here to Proceed' link this will display the **Guidelines** for the select method.
6. Click on 'Click to start Procurement Process' this will initiate the procurement and the package/ service will move to **in progress**.

In Progress

Initiated procurements are listed under the option **Procurement-> Process-> In Progress**



Category	Package Name	Procurement Number	Current Stage	Sub Category	Sub Component	Proc. Method
Civil Works						
	Lab Development	TEQIP-II/2010/NITRO/NCB/1	Work Completion Certificate and Payments	Refurbishment works	1	NCB
	MI Tanks	TEQIP-II/2010/NITRO/Shopping/2	Generation of Work Order	Others	1	Shopping
	SW1	TEQIP-II/2010/NITRO/Shopping/4	Quotation Opening	Extension of Buildings	1	Shopping
Goods						
	NG1	TEQIP-II/2010/NITRO/NCB/5	Generation of Bid Document	Furniture	1	NCB

1. Click on the Package/ Service Name, which is in the right section. This will open the procurement in its current stage.
2. Perform the action required for this stage and Click on 'Move to Next Stage'. Now, Perform the action required for this stage and click on 'Move to Next Stage' and so on. **(Details on performing each stage are described in detail in Chapters 5 to 13).**

3. Thus procurement processes for the package/ service can be completed by performing all the required stages (steps).

Note: All the stages (steps) for each procurement method are described in Chapters 5 to 13.

Completed

Completed procurements are listed under the option **Procurement-> Process-> Completed**

1. Click on the Package/ Service Name, which is in the right section.
2. To view details of the package/ service, click on the respective stage, steps or subtabs.
3. To view documents attached to the package/ service see the documents subtab.

Cancelled

Cancelled procurements are listed under the option **Procurement-> Process-> Cancelled**

1. Click on the Package/ Service Name, which is in the right section.
2. To view details of the package/ service, click on the respective stage, steps or subtabs.
3. To view documents attached to the package/ service see the documents subtab.

Chapter

5

SHOPPING METHOD

Procurement Using Shopping/ Direct Contracting Method

Shopping Goods

Purpose

To perform procurement of goods using shopping method.

Process flow

Role(s)

- Procurement Coordinator (institution)

Prerequisite

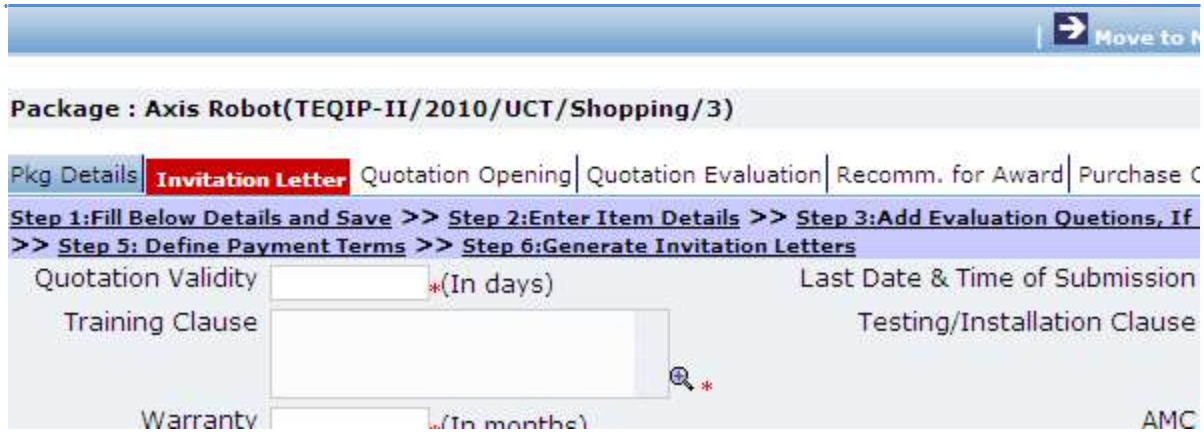
- Package to be procured should fall under category goods.
- Value of the package should be <=USD 20,000

Process Details

First stage of Shopping is '**Invitation Letter**'.

Invitation Letter

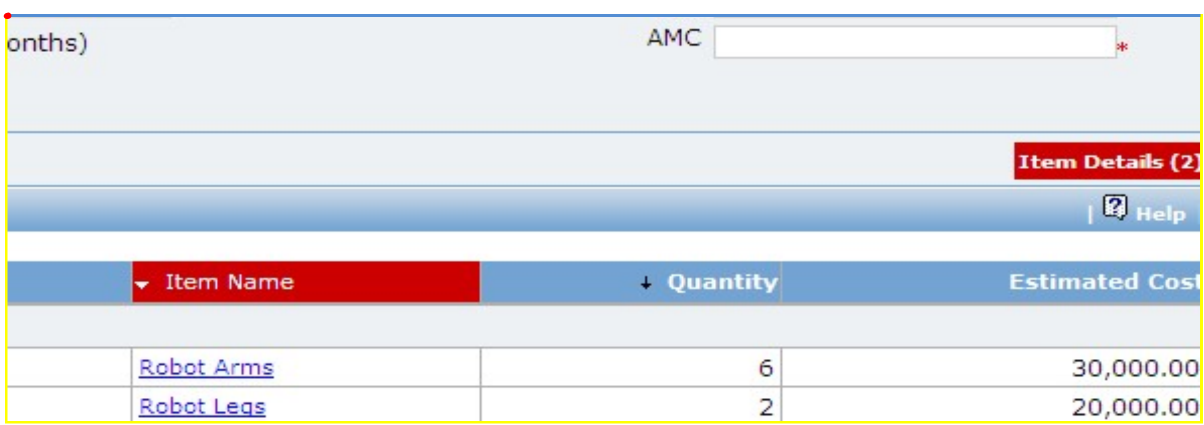
In this stage suppliers are added. Invitation letters are generated & sent out to these suppliers.



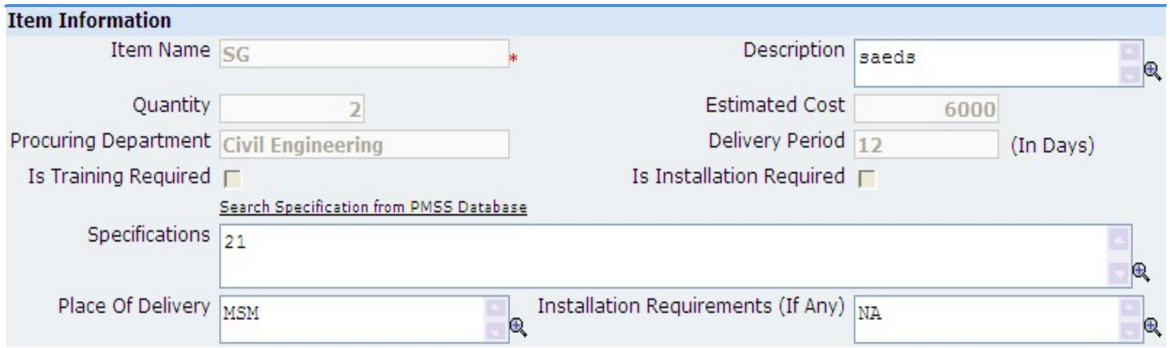
1. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Quotation Validity	Enter the number of days for which Quotation is required to be Validity.	15
2	Last Date & Time of Submission	Enter the date and time by which quotation should be submitted. Date format is DD/MM/YYYY and time format is HH:MM, 24 hrs format.	12/03/2011 16:00
3	Training Clause	Enter the training requirement, if any. Else enter NA.	
4	Testing/Installation Clause	Enter the testing/installation requirement, if any. Else enter NA.	
5	Warranty	Enter the warranty period in months. It should not be less than 6 months. In-case of no warranty enter NA.	
6	AMC	Mention whether AMC is applicable Yes/ No or enter the AMC amount.	

2. Click 'Save'
3. Click on 'Step 2: Enter Item Details' link. 'Items' subtab is shown in the lower section.



a. Click ‘Item Name’, a pop up will be seen.



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Is Training Required	Check this option if training is required for the selected item	
2	Is Installation Required	Check this option if installation is required for the selected item	
3	Specifications	Enter the item specification. Click on ‘Search Specification from PMSS Database’ link to get specifications from other items.	
4	Place Of Delivery	Mention the place of delivery where the selected item is required to be delivered	
5	Installation Requirements (If Any)	Mention the installation requirement details for the selected item, if any	

c. Click ‘Save’

d. If there is more than one item, repeat steps from a. to c.

4. Click on ‘Step 3: Add Evaluation Questions, If Required’ link **(this is an optional step, to be performed only if additional evaluation question are required)**. ‘Questions’ subtab is shown in the lower section.

a. Click ‘Add’, which is within the subtab. A pop up will be seen

b. Fill the fields on the page. Details of the fields are mentioned below;

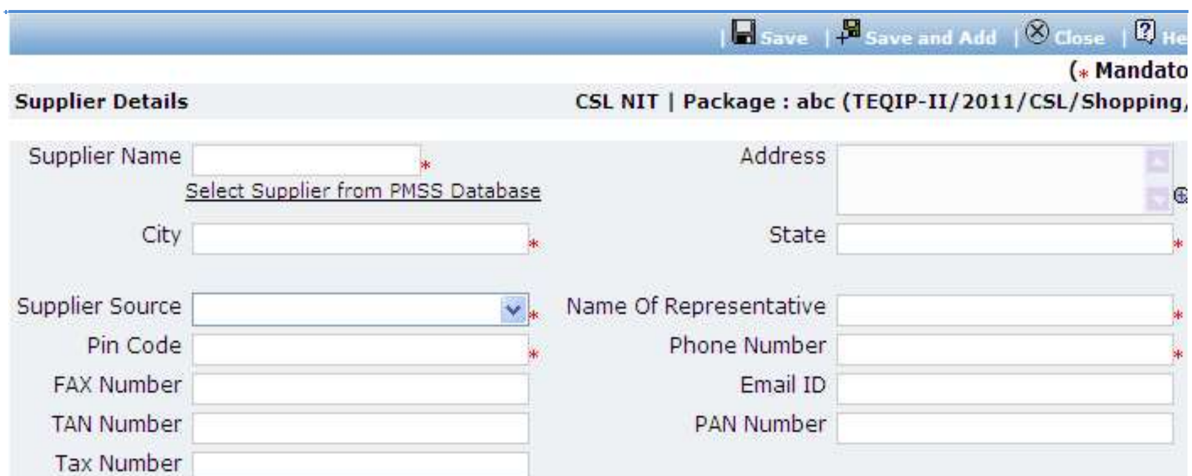
Sr. No.	Field Name	Field Description	Sample Data
1	Question	Enter the description of the question to be asked during quotation evaluation. Form the question such that response (answer) is Yes/ No/ NA.	Does the supplier have a local service center?
2	Non Responsive Value	Select the value (Yes/ No/ NA) based on which the supplier will become non- responsive.	E.g. if the question is 'Does the Contractor have a local service center?' then the non- responsive value could be 'No'.

c. Click 'Save'.

d. To add another Question repeat steps from a. to c.

5. Click on 'Step 4: Enter Supplier Details' link. Supplier Details subtab is shown in the lower section.

a. Click 'Add', which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Supplier Name	Enter the supplier name. Supplier can also be searched using 'Select Supplier from PMSS Database' link. Click on this link will display the existing list of suppliers, if any. Once the list is displayed click on the supplier's name this will auto populated the selected supplier's data. To search additional suppliers within the state or city use the filters provided on the page	FTTI Pvt Ltd

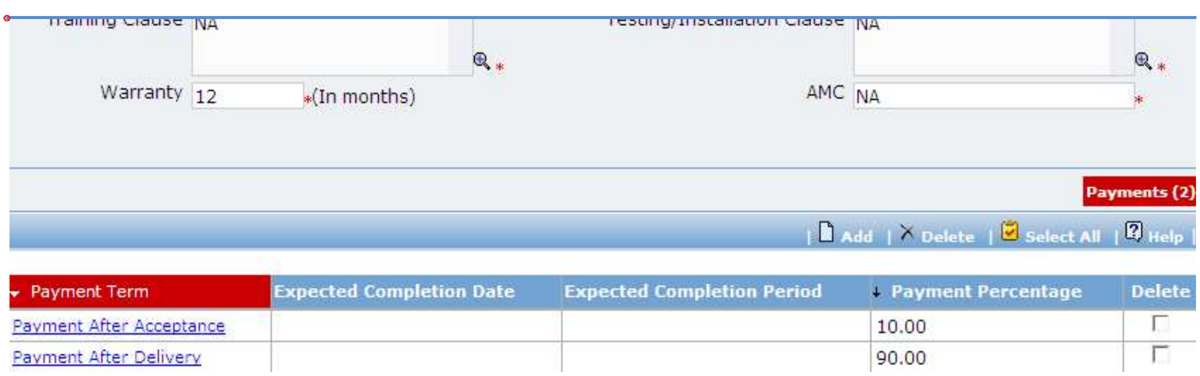
2	Address	Enter the address of the Supplier	STI Towers, Unit# 141/38, Campus 29. RMZ Millenia Business Park. 881, Dr. MGR Road
3	City	Enter the city of the Supplier	Pune
4	State	Enter the state of the Supplier	Maharashtra
5	Supplier Source	Select the source of supplier i.e. the source from which the supplier was found	Website
6	Specify Source	Only if 'Supplier Source' is 'Others' then type the source	Pamphlets
7	Email ID	Enter the Email ID of the Supplier	ftti@efttil.com
8	Pin Code	Enter the Pin Code of the Supplier	411232
9	Name Of Representative	Enter the Representative of the Supplier	Mr. Mohan Solanki
10	Phone Number	Enter the Phone Number of the Supplier. To enter more than one number use comma (,) as a separator.	26422689
11	PAN Number	Enter the PAN Number of the Supplier	ANS44874
12	TAN Number	Enter the TAN Number of the Supplier	
13	Tax Number	Enter the TAX Number of the Supplier	

c. Click 'Save'

d. To add another Supplier repeat steps from a. to c.

6. Click on 'Step 5: Define Payment Terms' link. 'Payments' subtab is shown in the lower section.

a. By default two Payment Terms are shown



b. Click on the Payment Term a pop up will be seen

c. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data

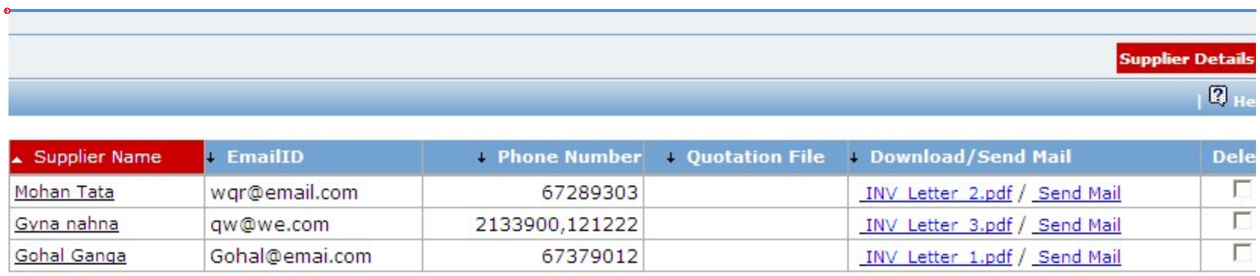
1	Completion Period	Mention the period in which this delivery is expected once the contract is signed.	30
2	Payment Percentage	By default percentage will be show, edit the percentage if required	10

d. Click 'Save'

e. Update the second payment term by repeating steps b. to d.

7. Click on 'Step 6: Generate Invitation Letters' link. This will generate the invitation letters for the added suppliers.

8. Click on 'Step 7: View & Print Invitation Letter'. 'Supplier Details' subtab is shown in the lower section



a. Click on the Invitation letter to view/ print the invitation letter.

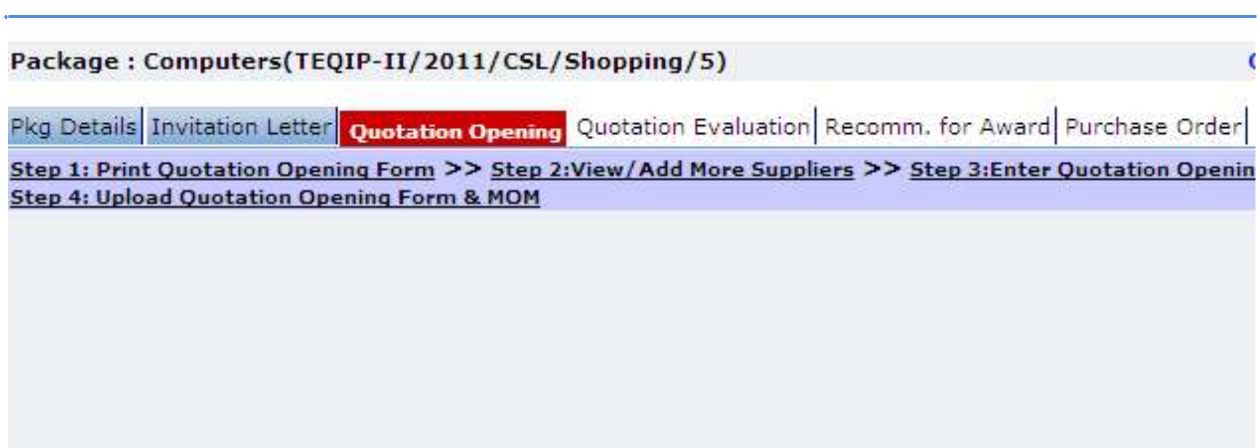
b. Click on Send Mail to send the invitation letter via email

c. Repeat above steps for all suppliers.

9. On completion of 'Invitation Letter' stage click on 'Move to Next Stage'. This will move the procurement to '**Quotation Opening**' stage.

Quotation Opening

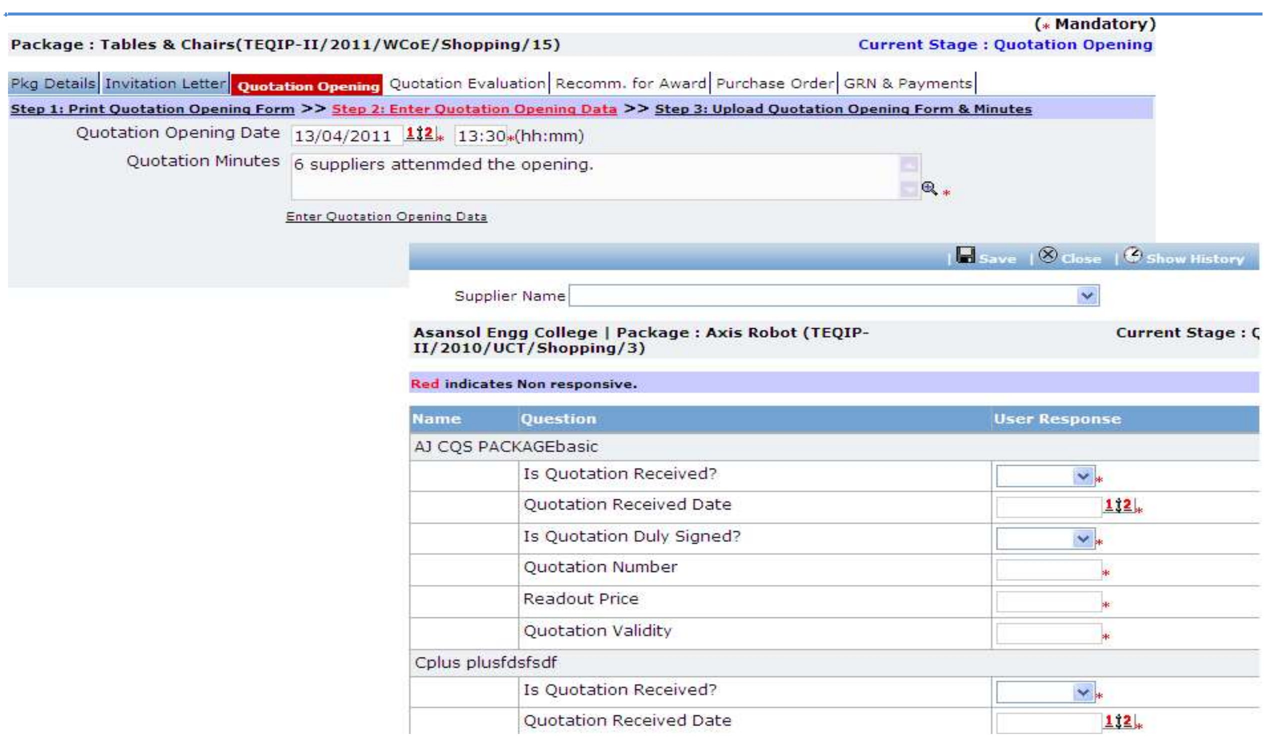
In this stage the quotation opening is performed and responsive quotations are identified.



10. On the ‘Quotation Opening’ tab click on ‘Step 1: Print Quotation Opening Form’. This will open a quotation opening form. This form can be used during Quotation Opening. Print of this form can be taken and Quotation opening details can be recorded on this form. The supplier names (which were added during Invitation letter stage) are seen on this form against which quotation opening details can be mentioned. Three extra columns are provided to accommodate names of any new suppliers who have submitted their quotations directly.
11. Click on ‘Step 2: Enter Quotation Opening Data’ and Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Quotation Opening Date	Enter the actual date and time when quotation was opened. Date format is DD/MM/YYYY and time format is HH:MM, 24 hrs format. It is recommended that opening should be done at the start of the week so that there is ample time to enter opening data in PMSS.	12/03/2011 16:00
2	Quotation MoM	Enter the Minutes of Meeting. Larger MoM’s can be uploaded using the documents subtab	

12. Click ‘Save’
13. Click on the ‘Enter Quotation Opening Data’ link. A pop up will be seen

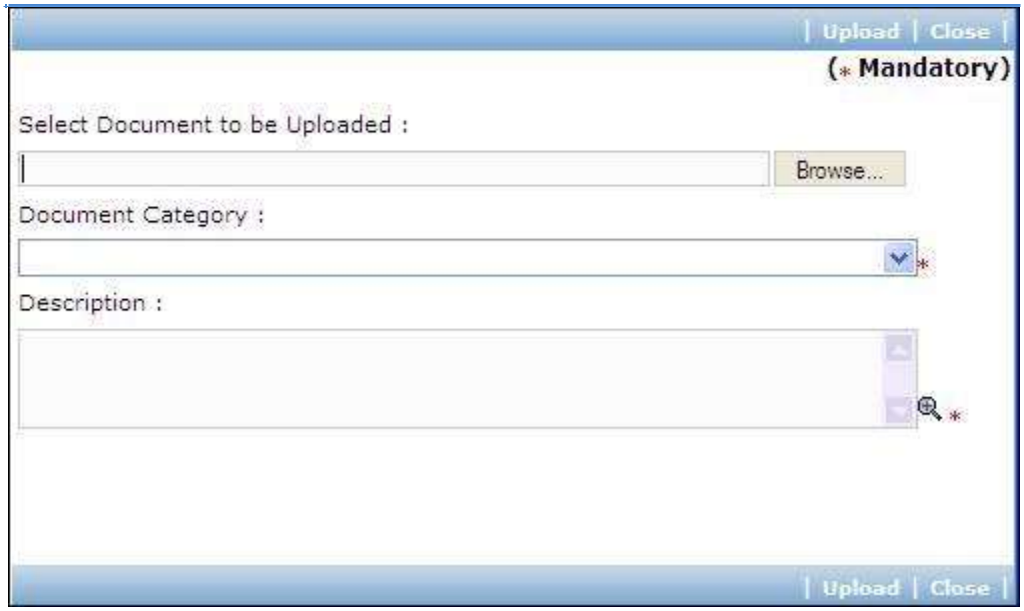


a. Enter the Responsiveness Criteria.

b. Click ‘Save’.

14. Click on ‘Step 3: Upload Quotation Opening Form’ link. ‘Documents’ subtab will be shown in the lower section.

a. Click ‘Add’, which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Quotation Opening Form
3	Description	Enter more information about the uploaded document.	Signed Quotation Opening Form

c. Click ‘Upload’ to upload the document in the system.

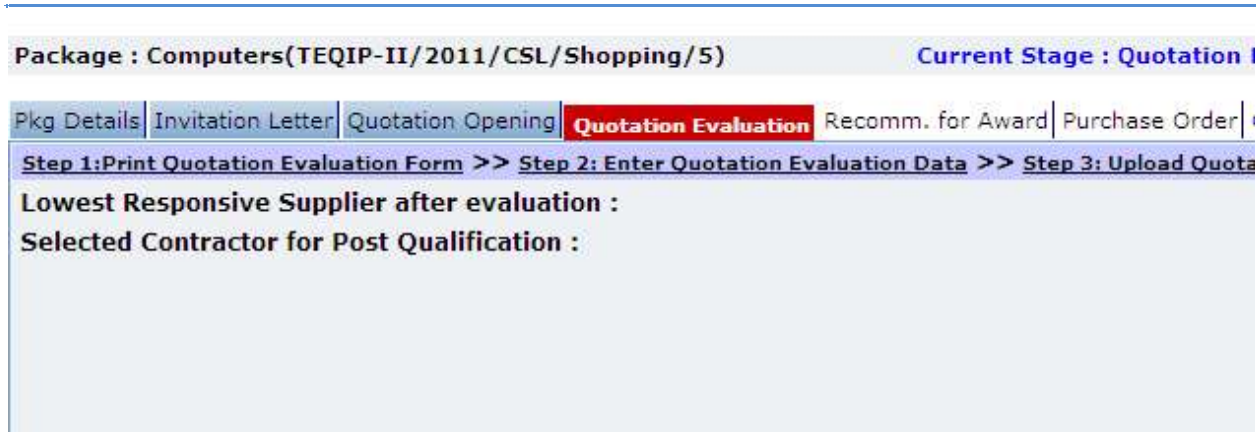
d. Uploaded document will appear on the list shown in ‘Documents’ section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

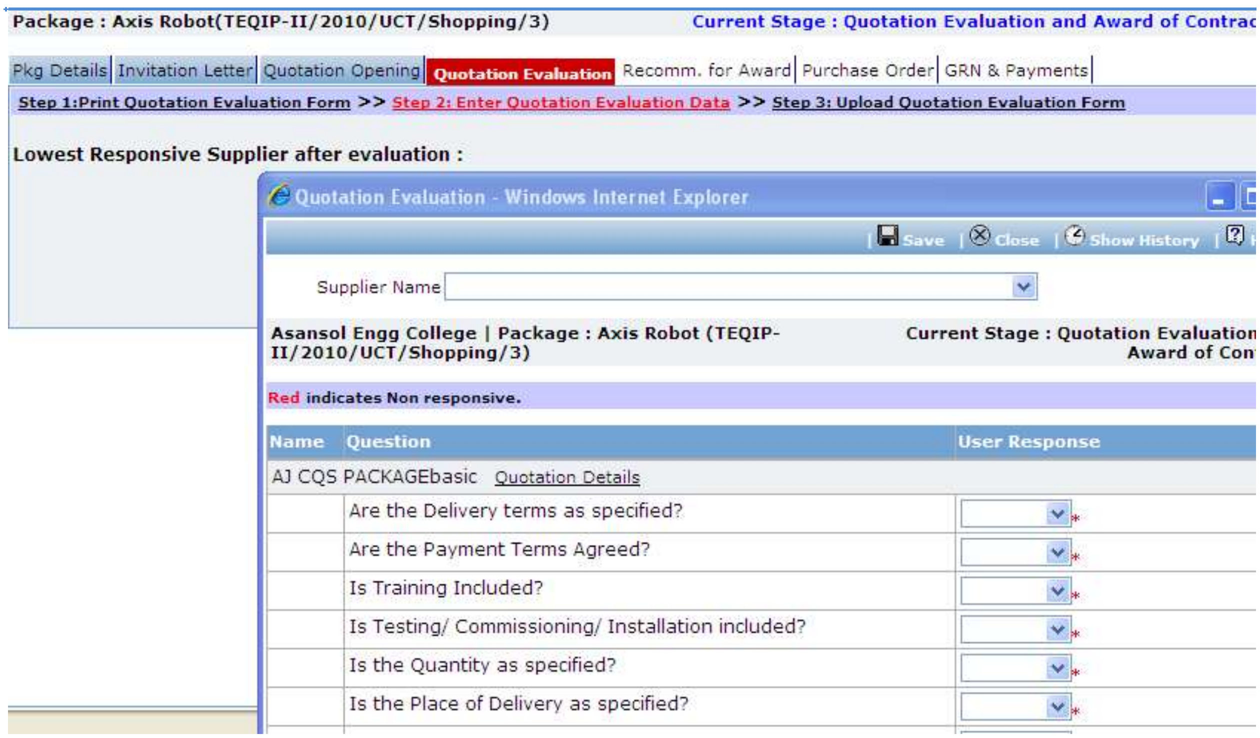
15. On completion of ‘Quotation Opening’ stage click on ‘Move to Next Stage’. This will move the procurement to ‘**Quotation Evaluation**’ stage.

Quotation Evaluation

In this stage evaluation is performed and lowest evaluated supplier is identified.



16. On the 'Quotation Evaluation' tab click on 'Step 1: Print Quotation Evaluation Form'. This will open a quotation evaluation form. This form can be used during Quotation Evaluation. Print of this form can be taken and Quotation Evaluation details can be recorded on this form.
17. Click on the 'Step 2: Enter Quotation Evaluation Data' link. A pop up will be seen



a. Enter the comparative data for all the supplier.
b. Click 'Save'.
c. Click on 'Quotation Details' link, which is in front of each responsive supplier. A popup will be seen.

d. Fill the fields on the page. Details of the fields are mentioned below;

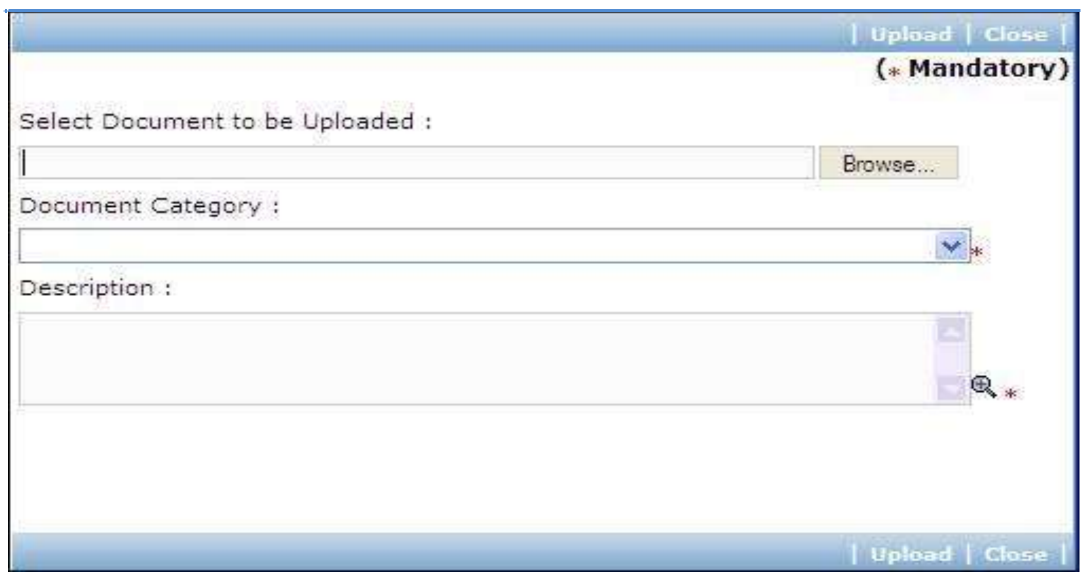
Sr. No.	Field Name	Field Description	Sample Data
1	Basic Cost per unit	Basic cost for each item can be entered in this field. Enter the basic cost per item as given by the supplier	2000
2	Comments	Enter comments, if any	Quotation Opening Form

e. Click on 'Save'

f. Quotation details of all responsive Suppliers can be entered by repeating steps from c. to e.

18. System will show the lowest evaluated responsive supplier (L1) on the main page.
19. Click on 'Step 3: Upload Quotation Evaluation Form' link. 'Documents' subtab will be shown in the lower section.

a. Click 'Add', which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Quotation Evaluation Form
3	Description	Enter more information about the uploaded document.	Signed Quotation Evaluation Form

c. Click 'Upload' to upload the document in the system.

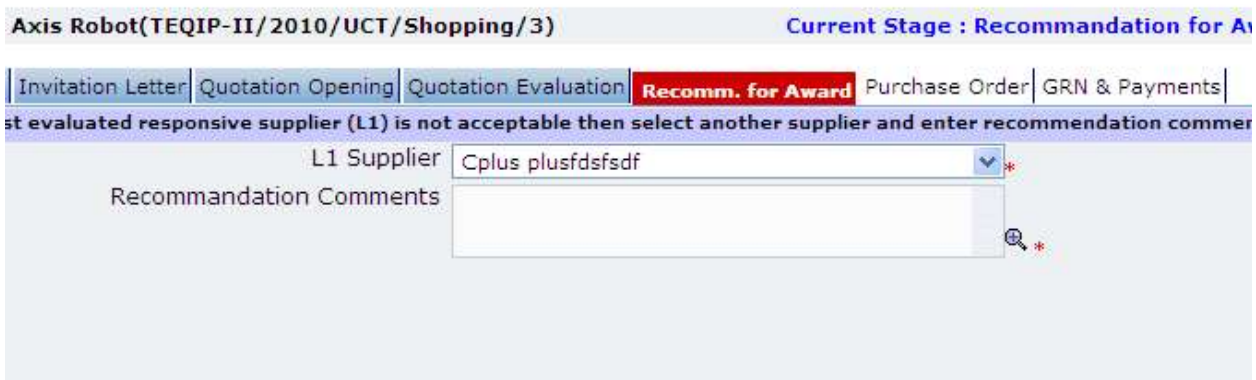
d. Uploaded document will appear on the list shown in 'Documents' section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

20. On completion of 'Quotation Opening' stage click on 'Move to Next Stage'. This will move the procurement to '**Recommendation for Award**' stage.

Recommendation for Award

In this stage appropriate responsive supplier can be recommend. If the lowest evaluated responsive supplier (L1) is not acceptable by the committee then another supplier can be selected in this stage



21. Fill the fields on the page. Details of the fields are mentioned below;

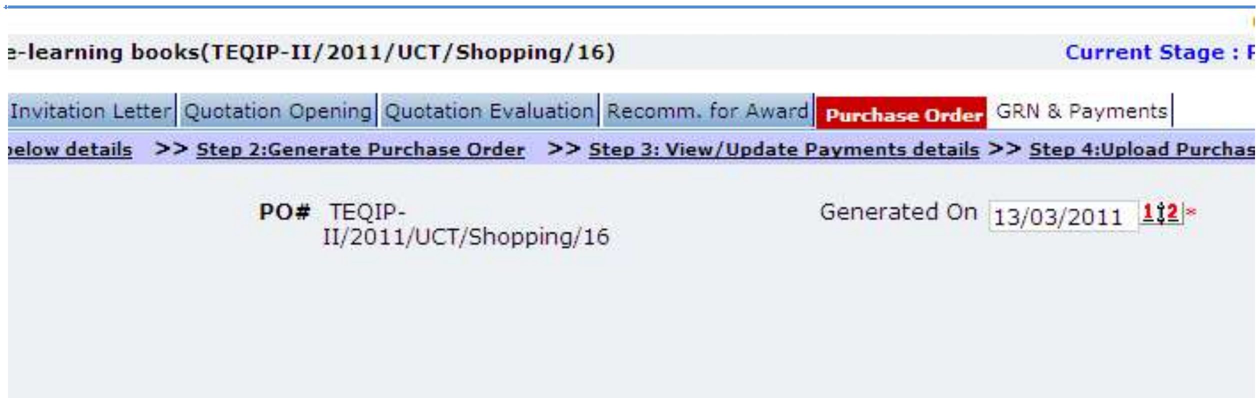
Sr. No.	Field Name	Field Description	Sample Data
1	L1 Supplier	If the lowest evaluated responsive supplier (L1) is not acceptable by the committee then another supplier can be selected	
2	Recommendation Comments	Enter the comments	

Note: If the Contract price (i.e. Evaluated Price) is more than 25% of the estimated price then the package will be sent for prior review. Once the user clicks on 'Move to Next Stage' system will ask for a confirmation before sending the package for prior review.

22. On completion of 'Recommendation for Award' stage Click on 'Move to Next Stage'. This will move the procurement to '**Purchase Order**' stage.

Purchase Order

In this stage PO is generated and Payment terms are updated with expected completion and payment dates

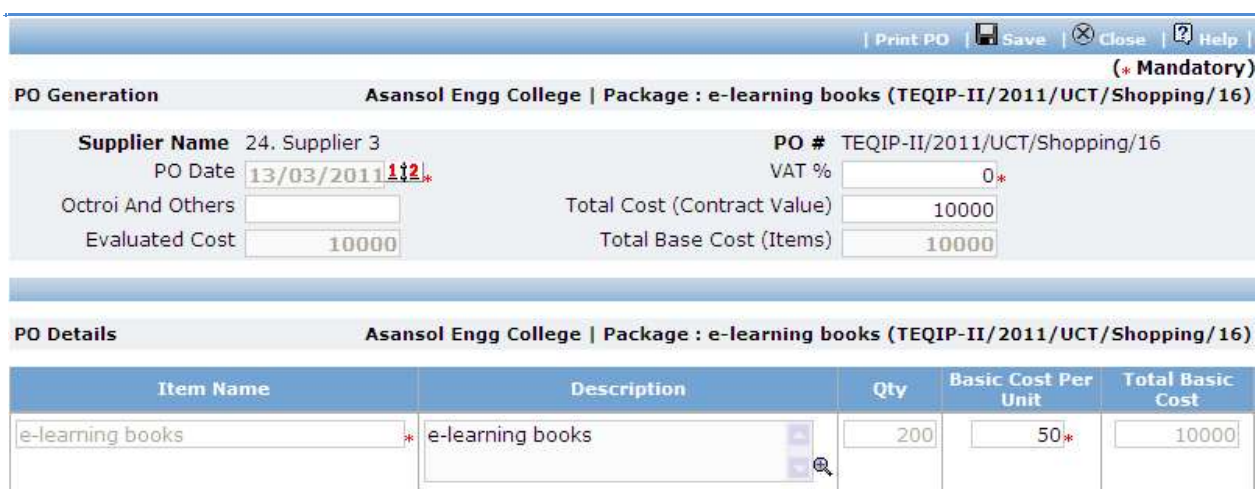


23. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Generated On	System will show the current date (i.e. today's date) by default. Click on 'Save'	Today's date
2	PO#	PO number will be generated automatically	

Note: If Generated date is greater than the bid validity (i.e. difference between Bid opening date and Generated date is more than the bid validity given by the selected supplier) system will ask to provide a new bid validity. Enter the total new bid validity. E.g. if original validity was 90 days and supplier has extended it by 30 days then enter 120 days.

24. Click on 'Step 2: Generate Purchase Order'. A Pop up will be seen



a. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	PO date	Will be auto populated as the PO generation date.	System calculated
2	GST %	Enter the Value Added Tax percentage for this PO. If there is no GST enter 0.	12
3	Octroi and Others	Enter the Octroi and Others charges amount	1200
4	Total Cost (Contract Value)	Will be auto calculated as (Total Base Cost + GST)	System calculated
5	Evaluated Cost	Will be auto populated from the Evaluated Price	System calculated
6	Total Base Cost (Item)	Will be auto calculated as (Qty*Basic Cost Per Unit)	System calculated
7	Basic Cost Per Unit	This can be seen in the lower row, i.e. in the items section. Edit the basic cost per unit as required. Basic Cost Per Unit should match the Evaluated cost	

b. Click 'Save'

c. Click 'Print PO'. System will give an option to Open/ Save the PO. Save the PO on your computer with a proper name. Update the sections highlighted in yellow and save the document.

25. Click on 'Step 2: View/Update Payments details' link. 'Payments' subtab will be seen in the lower section.

a. Click on the payment term name a pop up will be seen

b. Fill the fields on the page. Details of the fields are mentioned below;

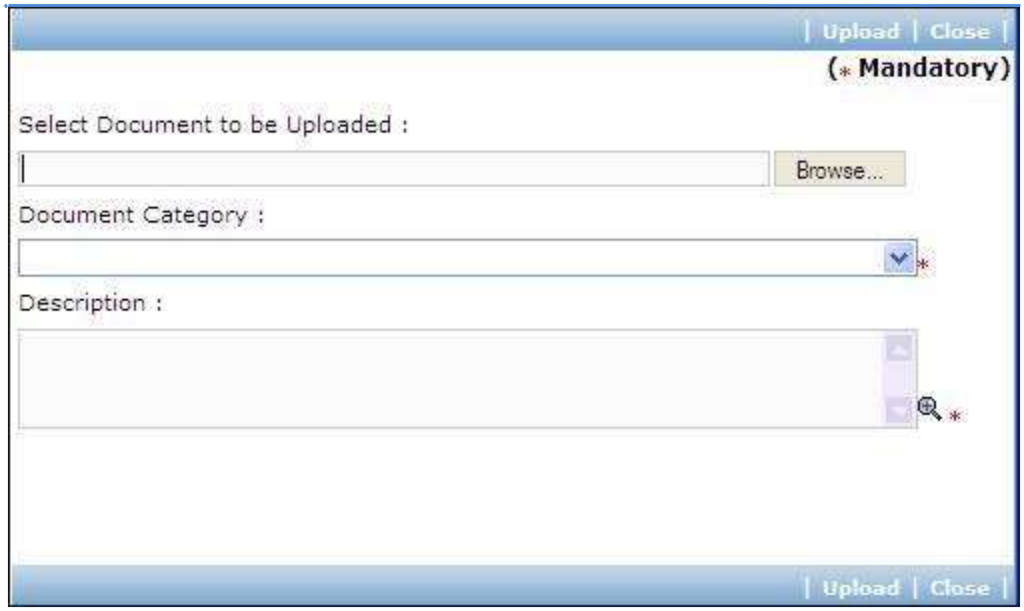
Sr. No.	Field Name	Field Description	Sample Data
1	Expected Completion Date	This is auto calculated as Contract Start Date + Expected Completion Period. Edit the date if required.	30
2	Expected Payment Date	Enter the expected date when payment will be made against this completion. Date format is DD/MM/YYYY	12/04/2011

c. Click 'Save'.

d. Update the other payment terms by repeating steps a. to c.

26. Click on 'Step 3: Upload Purchase Order'. 'Documents' subtab will be shown in the lower section.

a. Click 'Add', which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Quotation Evaluation Form
3	Description	Enter more information about the uploaded document.	Signed Quotation Evaluation Form

c. Click 'Upload' to upload the document in the system.

d. Uploaded document will appear on the list shown in 'Documents' section.

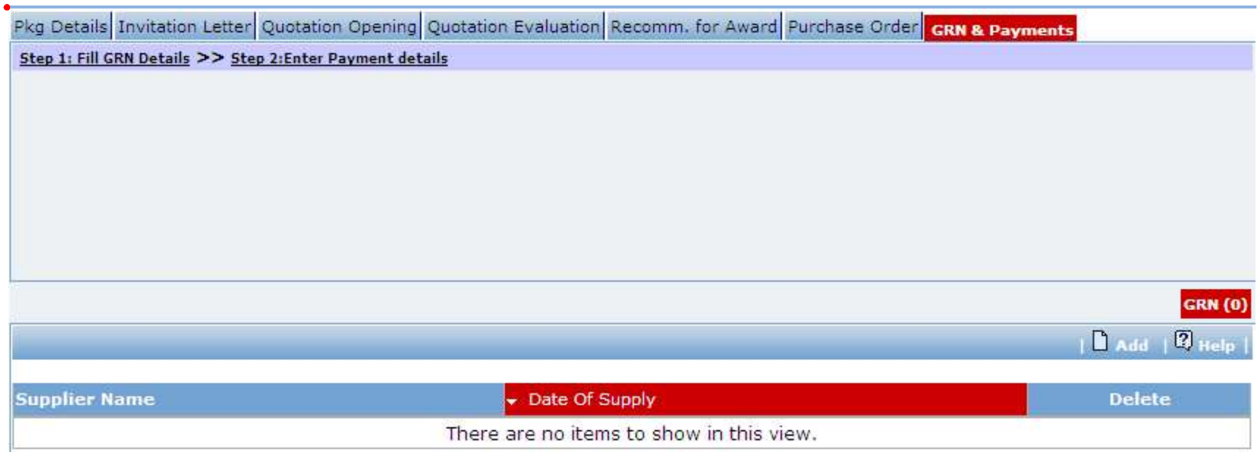
e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

27. On completion of 'Purchase Order' stage Click on 'Move to Next Stage'. This will move the procurement to '**GRN & Payments**' stage.

GRN & Payments

In this stage Goods received details are captured and Payment tracking is performed.

28. Click on 'Setp1: Fill GRN Details'. 'GRN' subtab will be shown in the lower section;

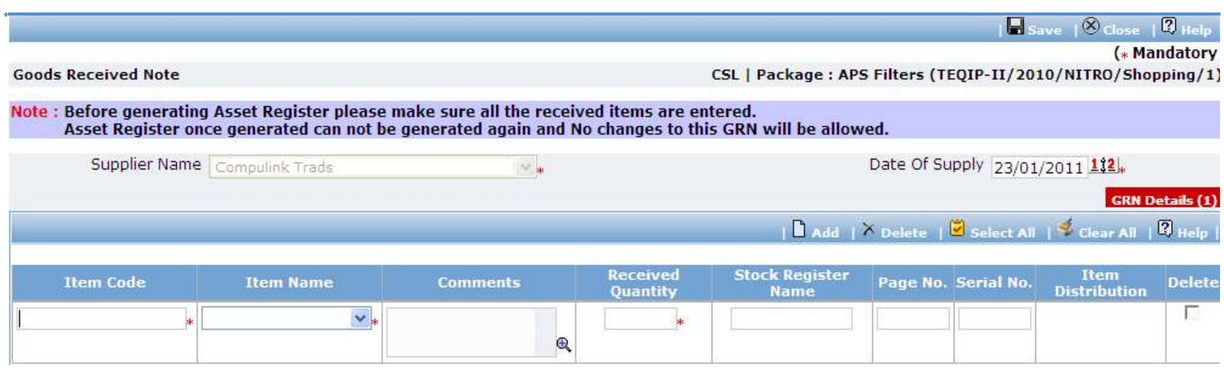


a. Click on 'Add', a pop up will be seen

b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Supplier Name	This field is auto populated with the selected supplier's name	System populated
2	Date of Supply	Enter the date when Goods are supplied. Date format is DD/MM/YYYY	12/8/2011

c. Click 'Add' link which is in the Items section.



d. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Item Code	Enter a short (abbreviated) name for the item that is supplied	LMPrinter – can be a short name for item 'LaserJet Monolithic Printer'
2	Item Name	Select the item that is supplied	LaserJet Monolithic Printer
3	Comments	Enter the comments, if required	Received ok
4	Received Quantity	Enter the quantity of item received	2

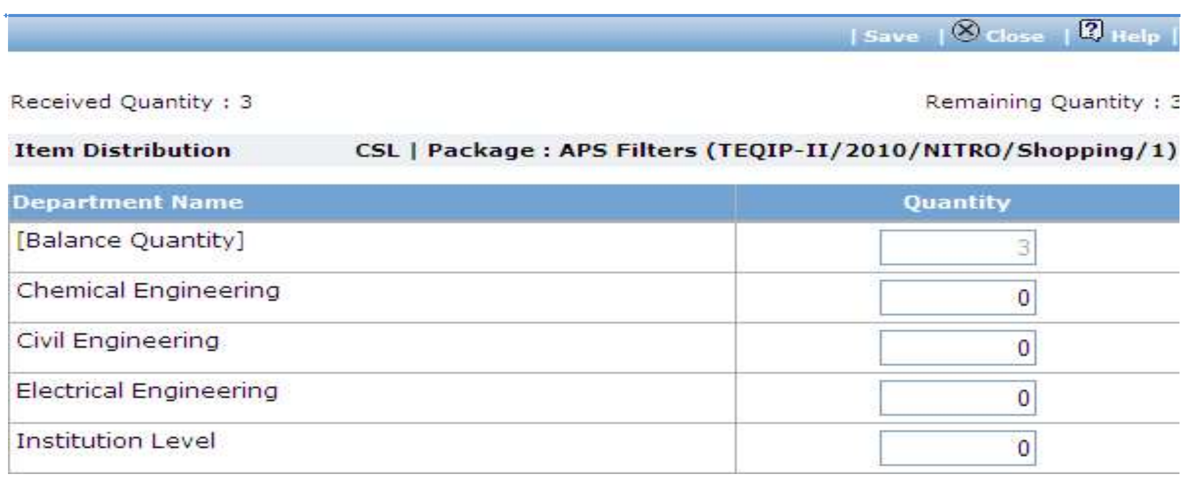
5	Stock Resistor Name	Enter the name of the resistor where the entry of this item is made for manual records	TEQIP – II stock resistor
6	Page No.	Enter the page number of the stock resistor on which this entry is made	32
7	Serial No.	Enter the serial number of this item	ABC Institution/ TEQIP – II/ LMP - 43

e. To add another Item repeat steps c. & d.

f. Click 'Save', which is on the upper bar of the main (GRN) section.

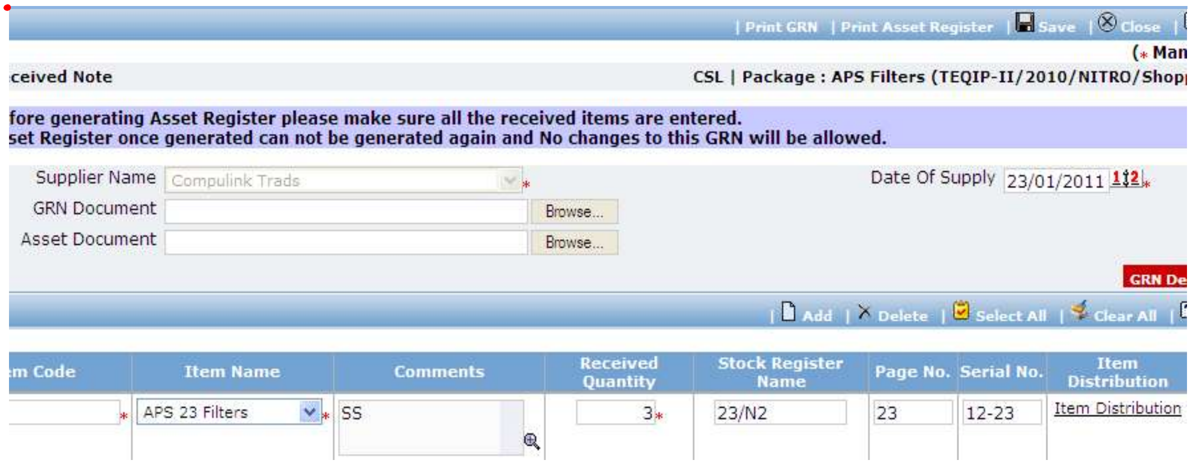
g. Once saved, 'Item Distribution' link will appear against each item.

h. Click on 'Item Distribution' link a pop up will be seen. Enter the **Actual** Quantity supplied to each department.

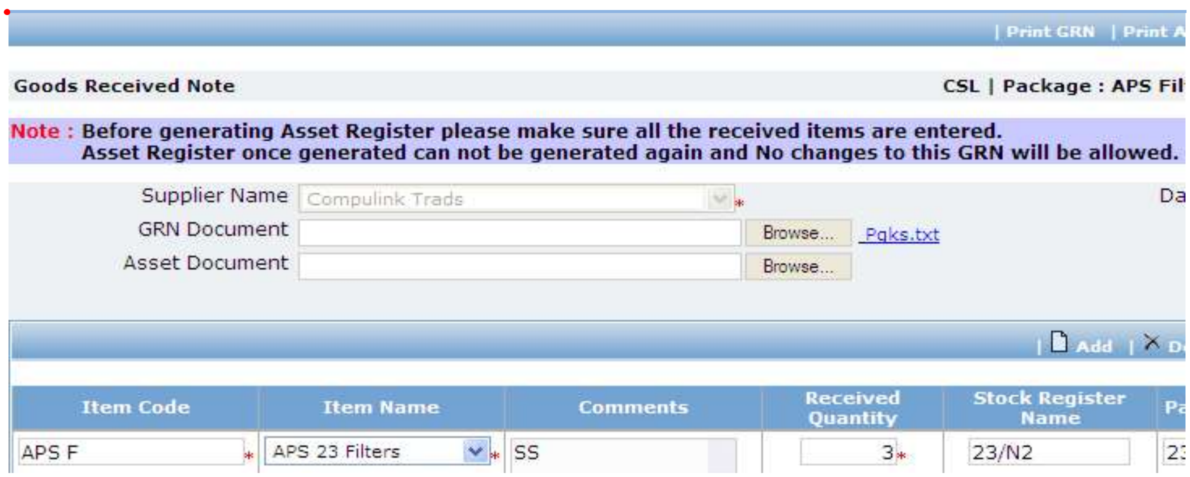


i. Click 'Save'.

j. Click on ‘Print GRN’, which is on the upper bar of the main (GRN) section. GRN Report will be generated.



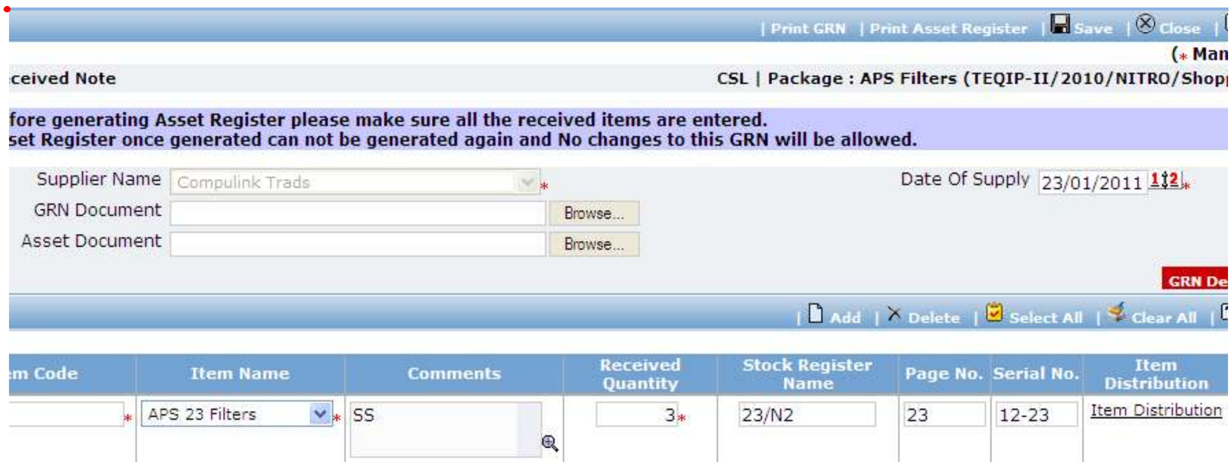
k. The GRN Report can be uploaded using the Browse function, which is in front of the ‘GRN Document’ field. Once uploaded, link will appear besides the browse function.



l. Report can be downloaded, if required by clicking on the link.

m. Click on ‘Print Asset Register’, which is on the upper bar of the main (GRN) section. Asset Register will be generated.

Note: Asset Register can be generated only once. System will give a warning message to confirm that all the items have been added etc. Once Asset Register is generated no changes can be made to that GRN record



n. Fill the fields in the Asset Register. Details of the fields are mentioned below;

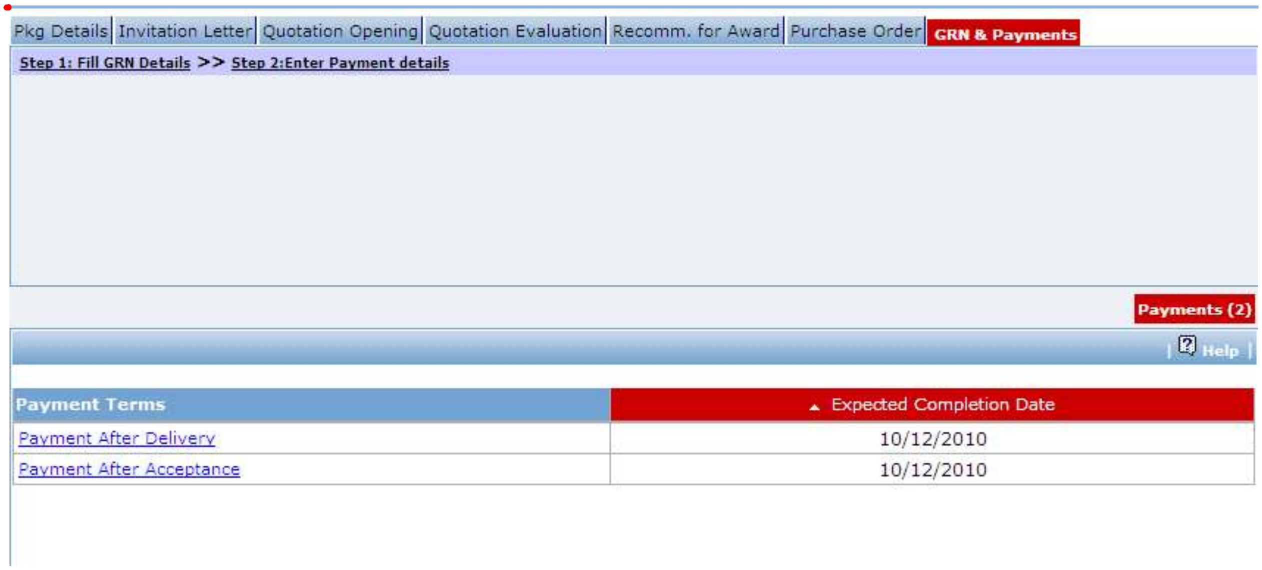
Sr. No.	Field Name	Field Description	Sample Data
1	Unique Number	Auto populated by the system based on the quantity of items received	
2	Model Number	Enter the model number of the item	HP LazerJet 3005
3	Serial Number	Enter the serial number of the item	

o. Once the Asset Register is filled it can be uploaded using the Browse function, which is in front of the 'Asset Document' field. Once uploaded, link will appear besides the browse function.

p. Asset Register can be downloaded by clicking on the link.

29. To add another record for GRN repeat steps from a. to p.

30. Click on 'Setp2: Enter Payment details'. 'Payments' subtab will be shown in the lower section;



a. Click on the Payment Term a pop up will be seen

b. Fill the fields on the page. Details of the fields are mentioned below;

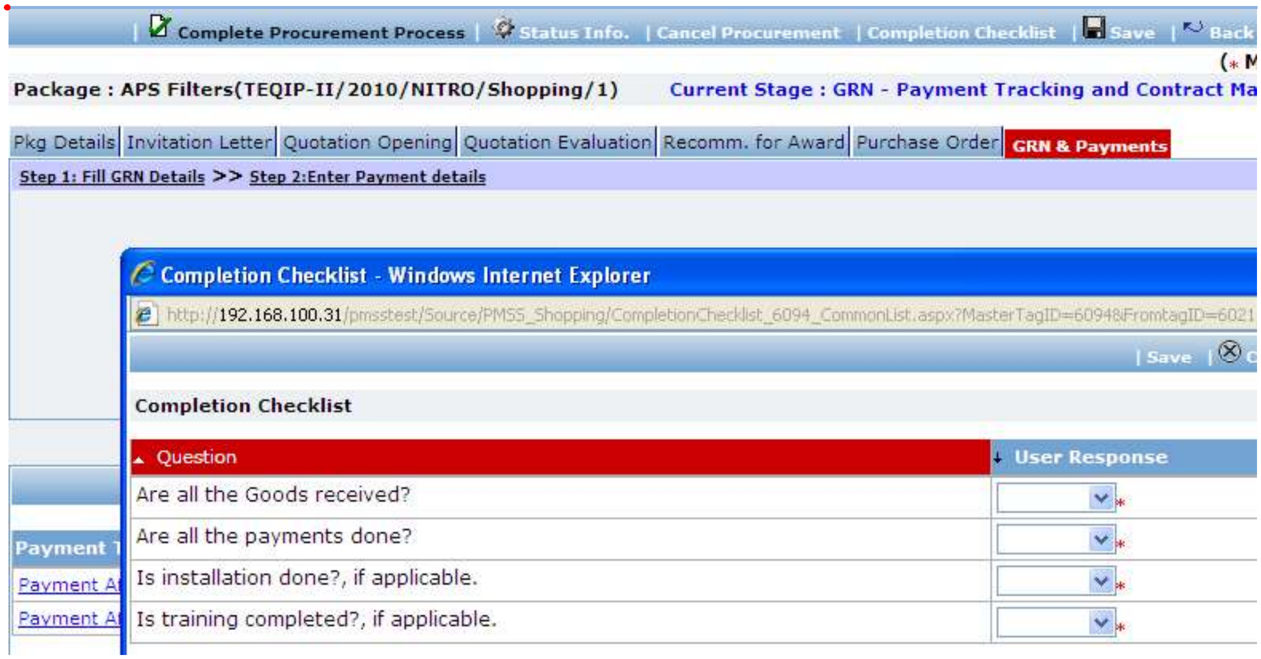
Sr. No.	Field Name	Field Description	Sample Data
1	Goods Received?	Check this box if goods are received against this payment	
2	Goods received note generated?	Check this box if GRN is generated for the received goods	
3	Actual Completion Date	Enter the actual date of delivery. Date format is DD/ MM/ YYYY	12/07/2011
	Actual Payment Amount	Enter the actual amount paid	12000
4	Actual Payment Date	Enter the date when payment is made. Date format is DD/MM/YYYY	13/08/2011
5	Cheque/Draft Number	Enter the Cheque/ Draft number by which payment is made	40023467
6	Comments	Enter the comments, if any	

c. Click ‘Save’

d. To enter details of another payment repeat steps a. to c.

31. Once all the details for all the payments are recorded, Procurement can be marked as complete.

Click on ‘Completion Checklist’, checklist will be seen



a. Fill in the completion checklist

b. Click ‘Save’

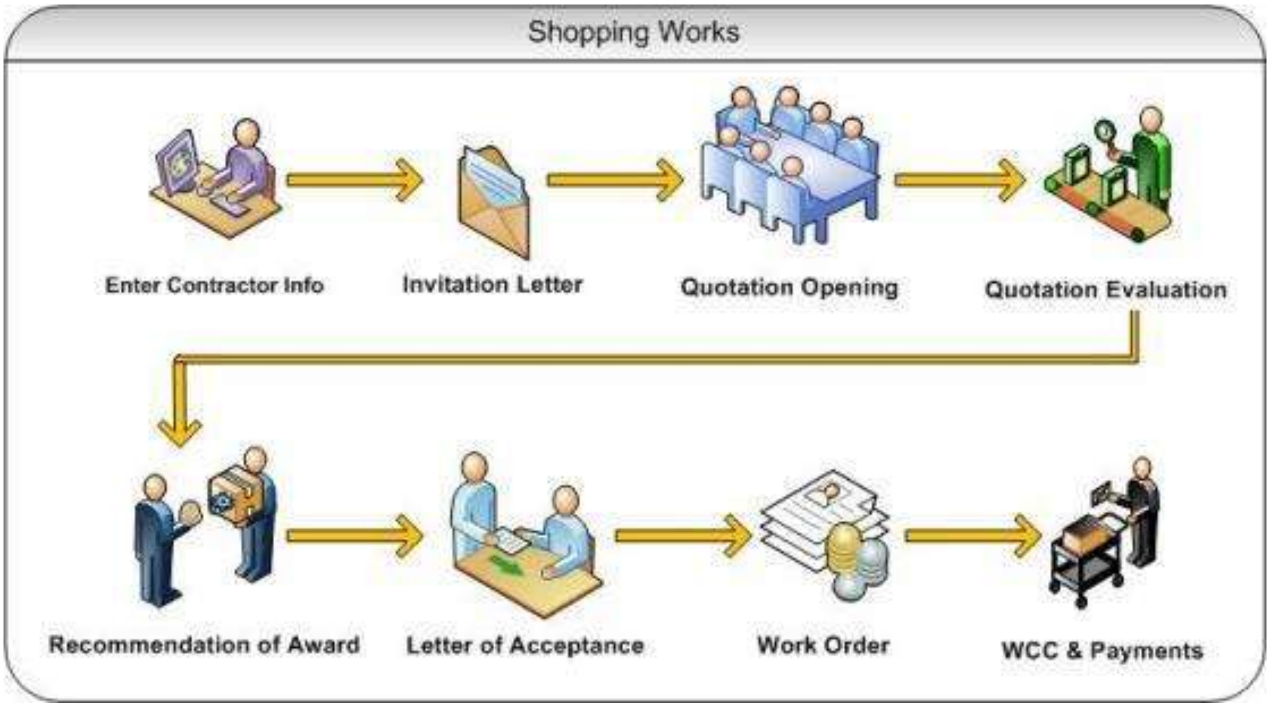
32. Click on ‘Complete Procurement Process’ this will complete the procurement for that Package.

Shopping Works

Purpose

To perform procurement of civil works using shopping method.

Process flow



Role(s)

- Procurement Coordinator (institution)

Prerequisite

- Package to be procured should fall under category civil works.
- Value of the package should be < USD 30, 000

Process Details

First stage of Shopping is '**Invitation Letter**'.

Invitation Letter

In this stage contractors are added. Invitation letters are generated & sent out to these contractors.

1. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Quotation Validity	Enter the number of days for which Quotation is required to be Validity.	15
2	Last Date & Time of Submission	Enter the date and time by which quotation should be submitted. Date format is DD/MM/YYYY and time format is HH:MM, 24 hrs format.	12/03/2011 16:00
3	Work Completion Period	Enter the total period in days by which work is expected to be completed	120
4	Liquidated Damages Per Day	Will be auto populated as 0.05%. Edit this field, if required. Value in this field will be used to calculated the Liquidated damages per day incase of any completion delays.	
5	Liquidated Damages (Maximum)	Will be auto populated as 2%. Edit this field, if required. Value in this field will be used to calculated the maximum amount of liquidated damages applicable	

2. Click ‘Save’
3. Click on ‘Step 2: View Item Details, if required’ link **(This is an optional step, used to only view the item details).** ‘Items’ subtab is shown in the lower section;
   a. Click ‘Item Name’, a pop up will be seen
   b. View the item details, if required
   c. If there is more than one item then, repeat steps a. and b.
4. Click on ‘Step 3: Add Evaluation Questions, If Required’ link **(This is an optional step, to be performed only if additional evaluation question are required)**. ‘Questions’ subtab is shown in the lower section.
   a. Click ‘Add’, which is within the subtab. A pop up will be seen

b. Fill the fields on the page. Details of the fields are mentioned below;

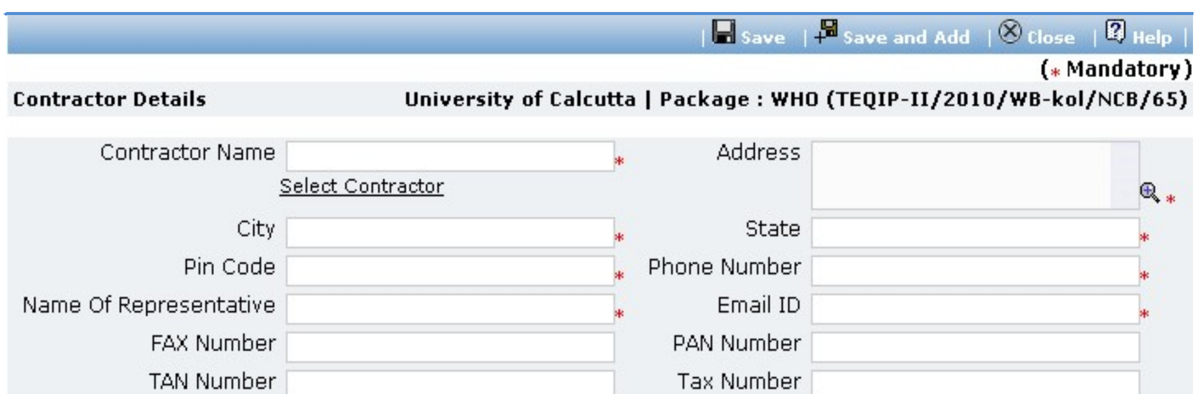
Sr. No.	Field Name	Field Description	Sample Data
1	Question	Enter the description of the question to be asked during quotation evaluation. Form the question such that response (answer) is Yes/ No/ NA.	Does the supplier have a local service center?
2	Non Responsive Value	Select the value (Yes/ No/ NA) based on which the supplier will become non- responsive.	E.g. if the question is 'Does the Contractor have a local service center?' then the non- responsive value could be 'No'.

c. Click 'Save'.

d. To add another Question repeat steps from a. to c.

5. Click on 'Step 4: Enter Contractor Details' link. 'Contractor Details' subtab is shown in the lower section.

a. Click 'Add', which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data

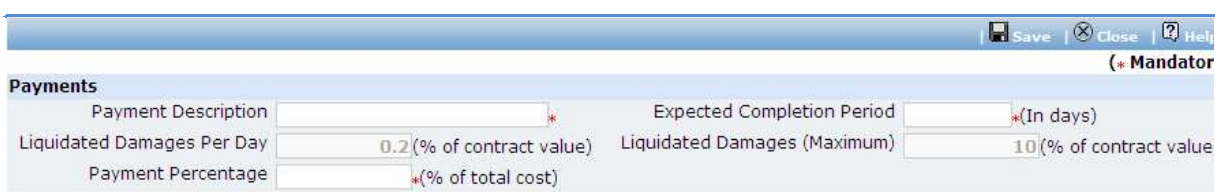
1	Contractor Name	Enter the contractor name. Contractor can also be searched using ‘Select Contractor from PMSS Database’ link. Click on this link will display the existing list of contractors, if any. Once the list is displayed click on the contractor’s name this will auto populated the selected contractor’s data. To search additional contractors within the state or city use the filters provided on the page	FTTI Construction
2	Address	Enter the address of the Supplier	STI Towers, Unit# 141/38, Campus 29. RMZ Millenia Business Park. 881, Dr. MGR Road
3	City	Enter the city of the Supplier	Pune
4	State	Enter the state of the Supplier	Maharashtra
7	Email ID	Enter the Email ID of the Supplier	ftti@efttil.com
8	Pin Code	Enter the Pin Code of the Supplier	411232
9	Name Of Representative	Enter the Representative of the Supplier	Mr. Mohan Solanki
10	Phone Number	Enter the Phone Number of the Supplier. To enter more than one number use comma (,) as a separator.	26422689
11	PAN Number	Enter the PAN Number of the Supplier	ANS44874
12	TAN Number	Enter the TAN Number of the Supplier	
13	Tax Number	Enter the TAX Number of the Supplier	

c. Click ‘Save’

d. To add another Contractor repeat steps from a. to c.

6. Click on ‘Step 5: Add/View Payment Terms’ link. ‘Payments’ subtab is shown in the lower section.

a. Click ‘Add’, which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

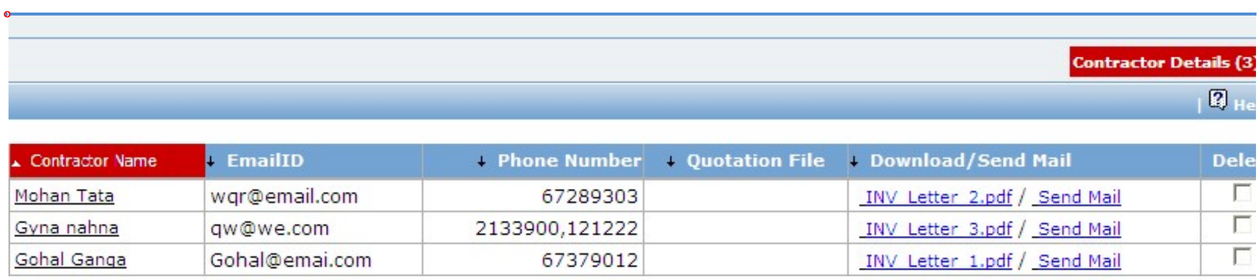
Sr. No.	Field Name	Field Description	Sample Data
1	Payment Terms	Enter the payment title	1. On reaching plinth level (first level) 2. On Completion
2	Completion Period	Enter the period in days in which completion is expected once the contract is signed.	60
3	Payment Percentage	By default percentage will be show, edit the percentage if required	10

c. Click 'Save'.

d. To add another payment term repeat steps from a. to c.

7. Click on 'Step 6: Generate Invitation letter' link. This will generate the invitation letters for the added contractors.

8. Click on 'Step 7: View & Print Invitation Letter'. 'Contractors Details' subtab is shown in the lower section



Contractor Name	EmailID	Phone Number	Quotation File	Download/Send Mail	Dele
Mohan Tata	wqr@email.com	67289303		INV_Letter_2.pdf / Send Mail	
Gyna nahna	qw@we.com	2133900,121222		INV_Letter_3.pdf / Send Mail	
Gohal Ganga	Gohal@emai.com	67379012		INV_Letter_1.pdf / Send Mail	

d. Click on the Invitation letter to view/ print the invitation letter.

e. Click on Send Mail to send the invitation letter via email

f. Repeat above steps for all contractors.

9. On completion of 'Invitation Letter' stage click on 'Move to Next Stage'. This will move the procurement to '**Quotation Opening**' stage.

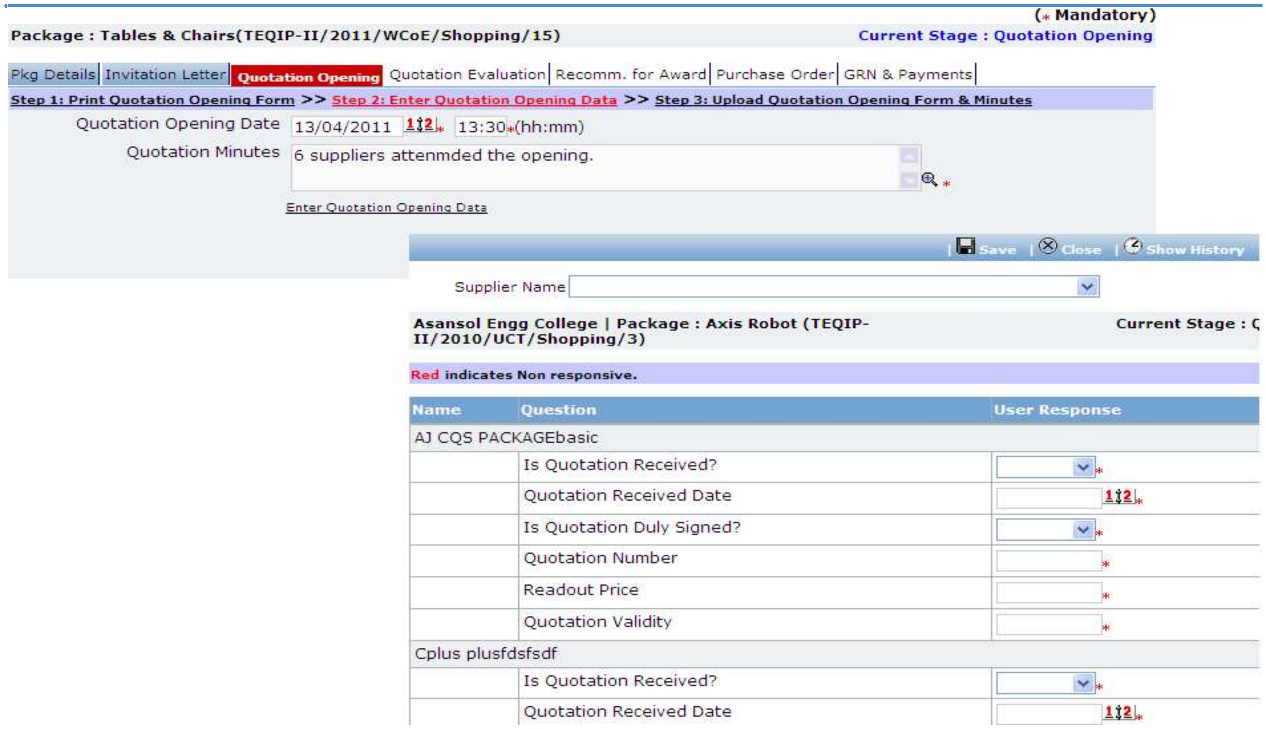
Quotation Opening

In this stage the quotation opening is performed and responsive quotations are identified.

10. On the 'Quotation Opening' tab click on 'Step 1: Print Quotation Opening Form'. This will open a quotation opening form. This form can be used during Quotation Opening. Print of this form can be taken and Quotation opening details can be recorded on this form. The Contractor names (which were added during Invitation letter stage) are seen on this form against which quotation opening details can be mentioned. Three extra columns are provided to accommodate names of any new contractors who have submitted their quotations directly.
11. Click on 'Step 2: Enter Quotation Opening Data' and Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Quotation Opening Date	Enter the actual date and time when quotation was opened. Date format is DD/MM/YYYY and time format is HH:MM, 24 hrs format. It is recommended that opening should be done at the start of the week so that there is ample time to enter opening data in PMSS.	12/03/2011 16:00
2	Quotation MoM	Enter the Minutes of Meeting. Larger MoM's can be uploaded using the documents subtab	

12. Click 'Save'
13. Click on the 'Enter Quotation Opening Data' link. A pop up will be seen



a. Enter the Responsiveness Criteria.

b. Click 'Save'.

14. Click on 'Step 3: Upload Quotation Opening Form' link. 'Documents' subtab will be shown in the lower section.

a. Click 'Add', which is within the subtab. A pop up will be seen

b. Fill the fields on the page. Details of the fields are mentioned below;

Sr.	Field Name	Field Description	Sample Data

No.			
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Quotation Opening Form
3	Description	Enter more information about the uploaded document.	Signed Quotation Opening Form

c. Click 'Upload' to upload the document in the system.

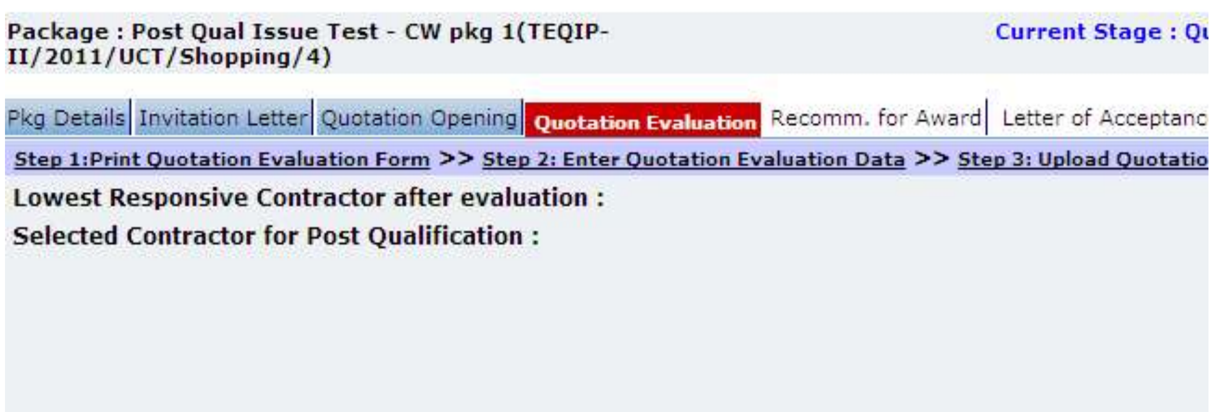
d. Uploaded document will appear on the list shown in 'Documents' section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

15. On completion of 'Quotation Opening' stage click on 'Move to Next Stage'. This will move the procurement to '**Quotation Evaluation**' stage.

Quotation Evaluation

In this stage evaluation is performed and lowest evaluated contractor is identified.



16. On the 'Quotation Evaluation' tab click on 'Step 1: Print Quotation Evaluation Form'. This will open a quotation evaluation form. This form can be used during Quotation Evaluation. Print of this form can be taken and Quotation Evaluation details can be recorded on this form.

17. Click on the 'Step 2: Enter Quotation Evaluation Data' link. A pop up will be seen

a. Enter the comparative data for all the contractors.

b. Click 'Save'.

c. Click on 'Quotation Details' link, which is in front of each responsive supplier. A popup will be seen.

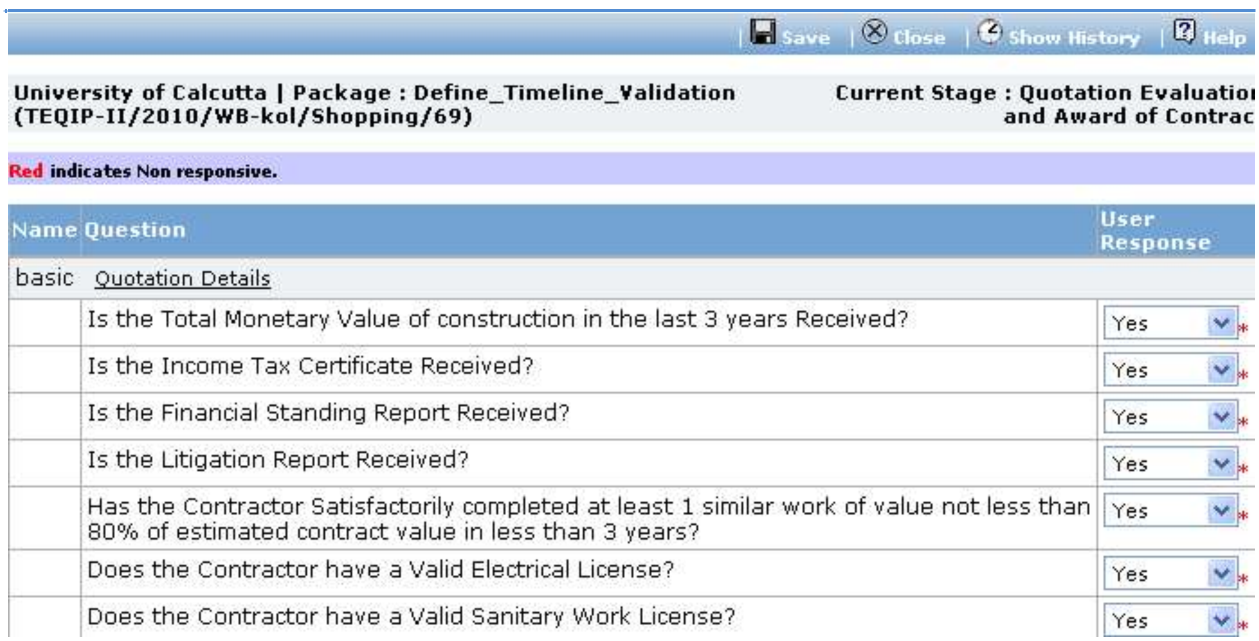
d. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Basic Cost per unit	Basic cost for each item can be entered in this field. Enter the basic cost per item as given by the supplier	2000
2	Comments	Enter comments, if any	

e. Click on 'Save'

f. Quotation details of all responsive Contractors can be entered by repeating steps from c. to e.

18. System will show the lowest evaluated responsive contractor (L1) on the main page.
19. Click on 'Perform Post Qualification' link, which is in front of the contractor name. A pop up will be seen



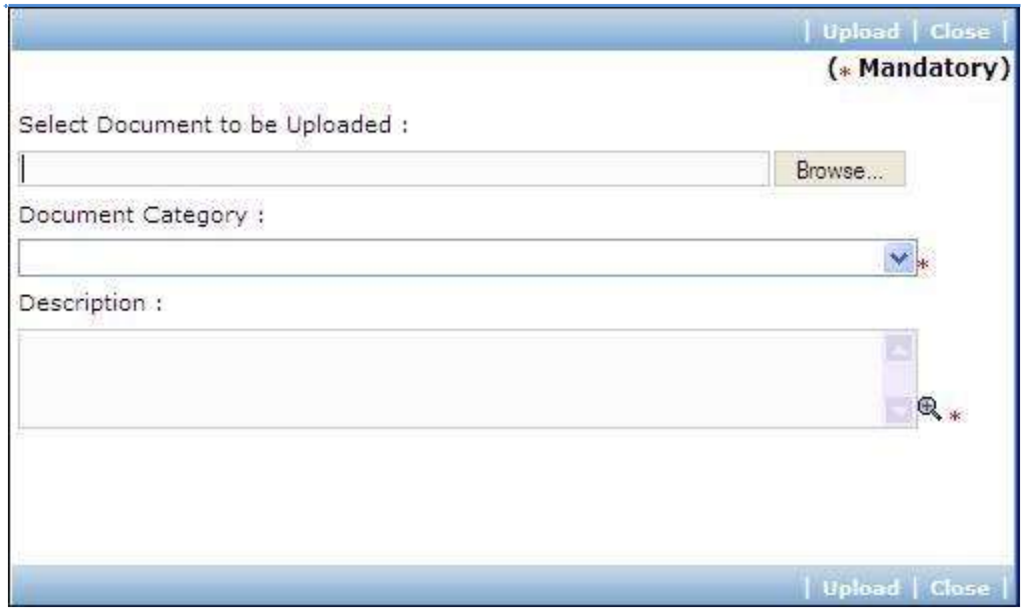
a. Enter the post qualification details

b. If the Contractor becomes non-responsive in this step then automatically next lowest evaluated contractor will be seen.

c. Repeat the Post Qualification process for this Contractor.

20. Click on 'Step 3: Upload Quotation Evaluation Form' link. 'Documents' subtab will be shown in the lower section.

a. Click 'Add', which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Quotation Evaluation Form
3	Description	Enter more information about the uploaded document.	Signed Quotation Evaluation Form

c. Click ‘Upload’ to upload the document in the system.

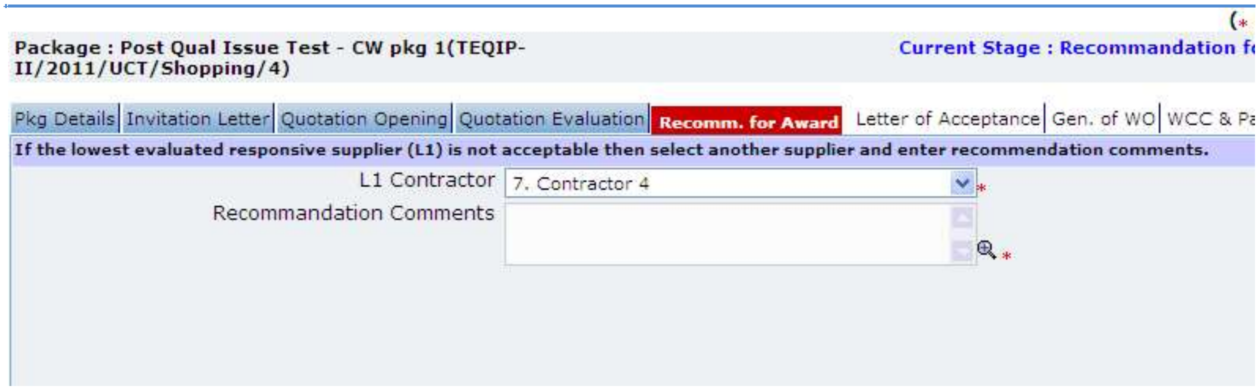
d. Uploaded document will appear on the list shown in ‘Documents’ section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

21. On completion of ‘Quotation Opening’ stage click on ‘Move to Next Stage’. This will move the procurement to ‘**Recommendation for Award**’ stage.

Recommendation for Award

In this stage appropriate responsive supplier can be recommend. If the lowest evaluated responsive contractor (L1) is not acceptable by the committee then another supplier can be selected in this stage



22. Fill the fields on the page. Details of the fields are mentioned below;

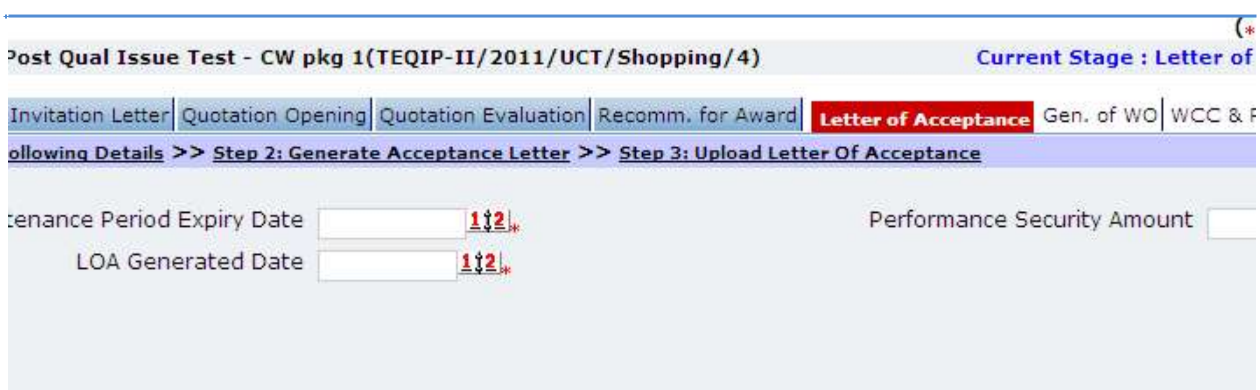
Sr. No.	Field Name	Field Description	Sample Data
1	L1 Contractor	If the lowest evaluated responsive contractor (L1) is not acceptable by the committee then another contractor can be selected	
2	Recommendation Comments	Enter the comments	

Note: If the Contract price (i.e. Evaluated Price) is more than 25% of the estimated price then the package will be sent for prior review. Once the user clicks on 'Move to Next Stage' system will ask for a confirmation before sending the package for prior review.

23. On completion of 'Quotation Opening' stage click on 'Move to Next Stage'. This will move the procurement to '**Letter of Acceptance**' stage.

Letter of Acceptance

In this stage Letter of Acceptance is generated and acceptance is taken from the contractor

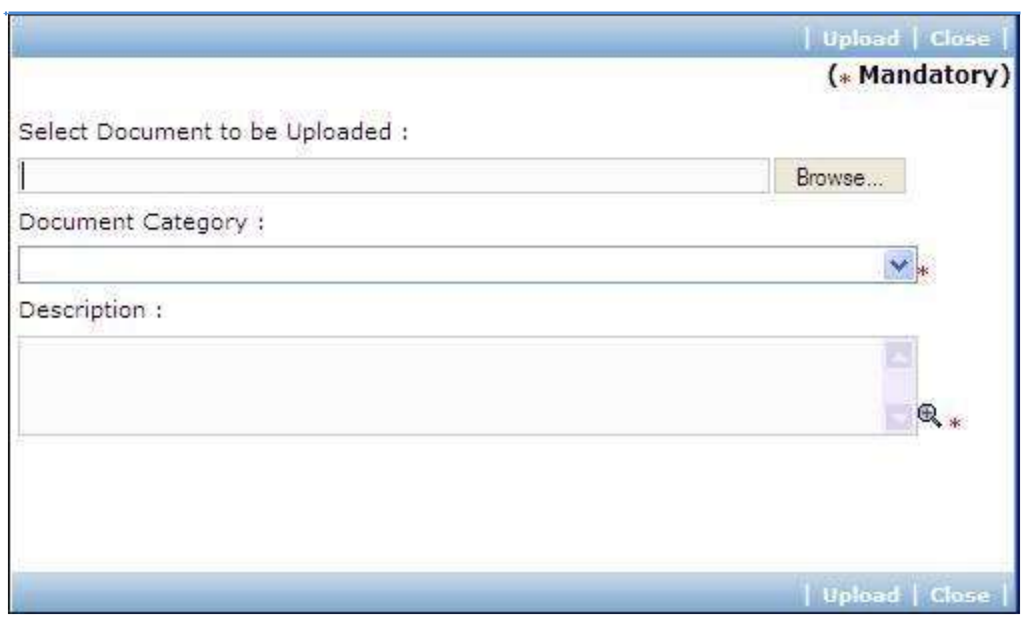


24. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	LOA Generated Date	System will show the current date (i.e. today's date) by default. Click on 'Save'	Today's Date
2	Performance Security Amount	Will be auto calculated by the system	
3	Maintenance Period Expiry Date	Enter the maintenance period date. Date format is DD/MM/YYYY	29/8/2011

Note: If Generated date is greater than the bid validity (i.e. difference between Bid opening date and Generated date is more than the bid validity given by the selected supplier) system will ask to provide a new bid validity. Enter the total new bid validity. E.g. if original validity was 90 days and contractor has extended it by 30 days then enter 120 days.

25. Click on 'Step 2: Generate Acceptance Letter' link. System will give an option to Open/ Save the LOA. Save the LOA on your computer with a proper name. Update the sections highlighted in yellow and save the document.
26. Click on 'Step 3: Upload Letter Of acceptance' link. 'Documents' subtab will be shown in the lower section.
    a. Click 'Add', which is within the subtab. A pop up will be seen



    b. Fill the fields on the page. Details of the fields are mentioned below;

Sr.	Field Name	Field Description	Sample Data

No.			
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	LOA
3	Description	Enter more information about the uploaded document.	Signed LOA uploaded

c. Click ‘Upload’ to upload the document in the system.

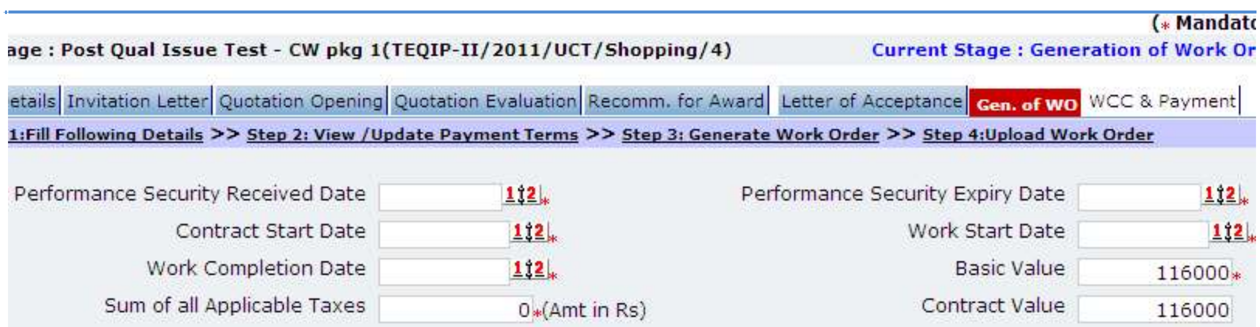
d. Uploaded document will appear on the list shown in ‘Documents’ section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

27. On completion of ‘Letter of Acceptance’ stage Click on ‘Move to Next Stage’. This will move the procurement to ‘**Gen of WO**’ stage.

Gen of WO

In this stage Work Order is generated and Payment terms are updated with expected completion and payment dates



28. Fill the fields on the page. Details of the fields are mentioned below;

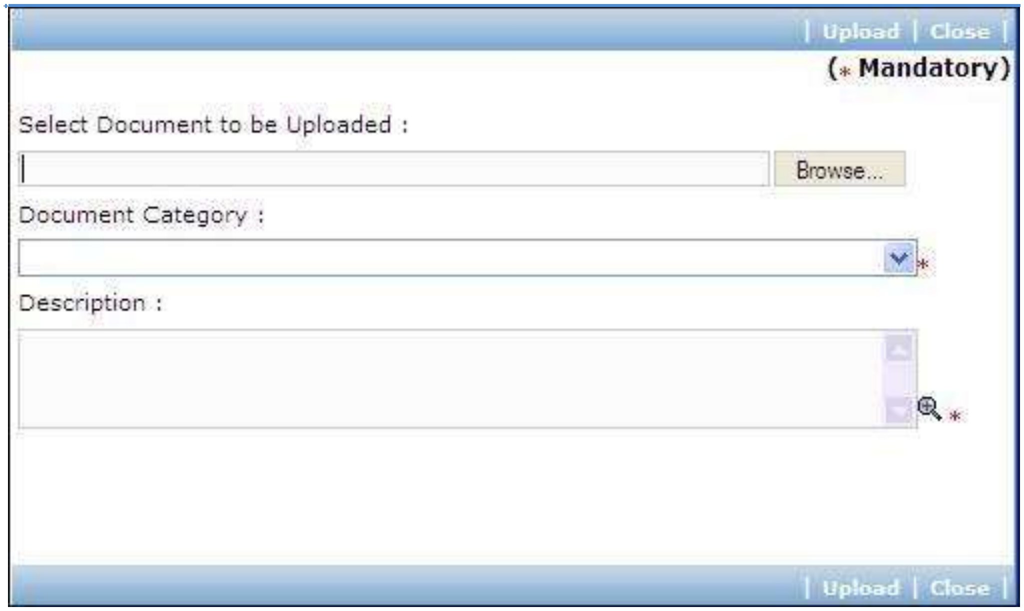
Sr. No.	Field Name	Field Description	Sample Data
1	Performance Security rcvd Date	Enter the date when Performance Security was received from the contractor. Date format is DD/MM/YYYY	12/05/2011
2	Performance Security Expiry Date	Enter the date when Performance Security will expiry. This date should be more than Work Completion Date + Maintenance Period Expiry Date + 28 days	29/06/2013
3	Contract Start Date	Enter the date when contract is expected to start. Date format is DD/MM/YYYY	01/06/2011

4	Work Start Date	Enter the date when work is expected to start. Date format is DD/MM/YYYY	01/06/2011
5	Work Completion Date	Enter the date when work is expected to complete. Date format is DD/MM/YYYY	23/05/2012
6	Basic Value	Will be auto populated from the Evaluated Price	System calculated
7	Sum of all Applicable Taxes	Enter the total amount of all the taxes	2300
8	Contract Value	Will be auto populated as Basic Value + Sum of all Applicable Taxes	System calculated

29. Click on 'Step 2: View/Update Payments details' link. 'Payments' subtab will be seen in the lower section.
    a. Click on payment term a pop up will be seen
    b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Expected Completion Date	This is auto calculated as Contract Start Date + Expected Completion Period. Edit the date if required.	30
2	Expected Payment Date	Enter the expected date when payment will be made against this completion. Date format is DD/MM/YYYY	12/06/2011

    c. Click 'Save'.
    d. Update the other payment terms by repeating steps a. to c.
30. Click on 'Generate Work Order'link. System will give an option to Open/ Save the WO. Save the LOA on your computer with a proper name. Update the sections highlighted in yellow and save the document.
31. Click on 'Step 4: Upload Work Order' link. 'Documents' subtab will be shown in the lower section.
    a. Click 'Add', which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Work Order
3	Description	Enter more information about the uploaded document.	Signed WO uploaded

c. Click ‘Upload’ to upload the document in the system.

d. Uploaded document will appear on the list shown in ‘Documents’ section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

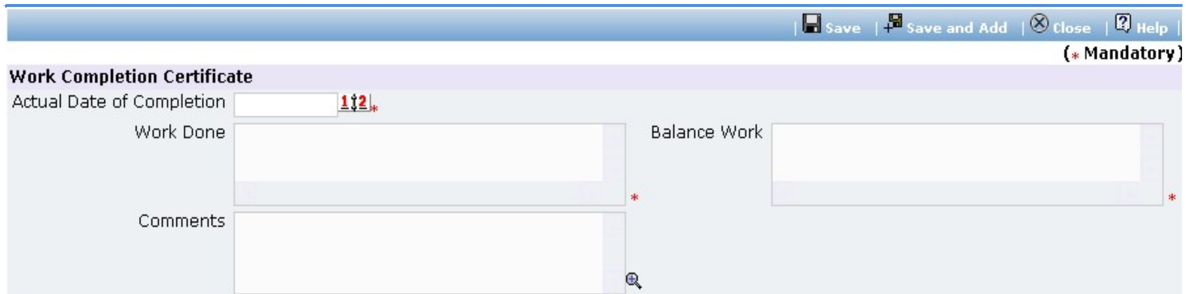
32. On completion of ‘Work Order’ stage Click on ‘Move to Next Stage’. This will move the procurement to ‘**WCC & Payments**’ stage.

WCC & Payments

In this stage Work completion details are captured and Payment tracking is performed.

33. Click On ‘Step 1: Add/View Work Completion’ link. ‘Work Completion’ subtab will be seen

a. Click on ‘Add’, a pop up will be seen

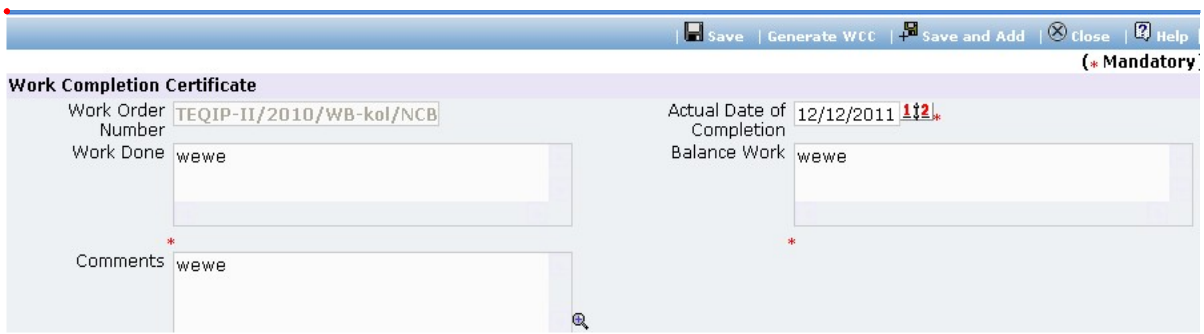


b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Actual Date of Completion	Enter the completion date. Date format is DD/MM/YYYY	22/18/2011
2	Work Done	Mention the work completion details	
3	Balance Work	Mention the details of the remaining work	
4	Comments	Enter comments, if any	

c. Click 'Save'

d. Click on ' Generate WCC' , which is on the upper bar of the main (WCC) section. WCC Report will be generated.



e. To add another record for WCC repeat steps from a. to d.

34. Click on 'Step 2: Enter/View Payment Details'. 'Payments' subtab will be seen in the lower section

a. Click on the Payment Term a popup will be seen

b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	WCC Generated?	Check this box if Work completion certificate is generated	
2	Work Completed?	Check this box if work is completed	
3	Actual Completion Date	Enter the actual date of completion. Date format is DD/ MM/ YYYY	12/10/2011

4	Liquidated Damages Waived?	Check this box if Liquidated Damages are going to be waived	
5	Liquidated Damages	Will be auto populated if 'Actual Completion date' is more than 'Expected completion date'	
6	Actual Completion Period	Enter the actual completion period in days	
7	Comments	Comment on Actual completion period, if required	
8	Actual Payment Date	Enter the date when payment is made. Date format is DD/MM/YYYY	13/08/2011
9	Comments	Comment on Actual Payment Date, if required	
8	Actual Payment Amount	Enter the actual amount paid. Ideally, this amount + the Retention Money amount should match the Expected Payment amount	12000
10	Comments	Comment on Actual Payment Amount, if required	
11	Retention Money	Will be auto calculated as 5% of Expected payment amount	2300
12	Cheque/Draft Number	Enter the Cheque/ Draft number by which payment is made	40023467

c. Click 'Save'

d. To enter details of another payment repeat steps a. to c.

35. In cases where Amendment is made click on 'Fill Amendment details, if required' link.

36. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	**Field Name**	**Field Description**	**Sample Data**
1	Is Amendment required?	Select yes to perform amendment. *Other fields (described below) will be shown once 'Yes' option is selected.*	Yes
2	Maintenance Period Expiry Date	System will show the Maintenance Period Expiry Date. Edit the date, if required.	
4	Work Completion Date	System will show the completion date. Edit the date as per new completion date.	
3	Performance Security Amount	System will show the performance security amount. Edit the amount, if required	
5	Performance Security Expiry Date	System will show the performance security expiry Date. Edit the date as per new expiry date	

a. Click ‘Save’

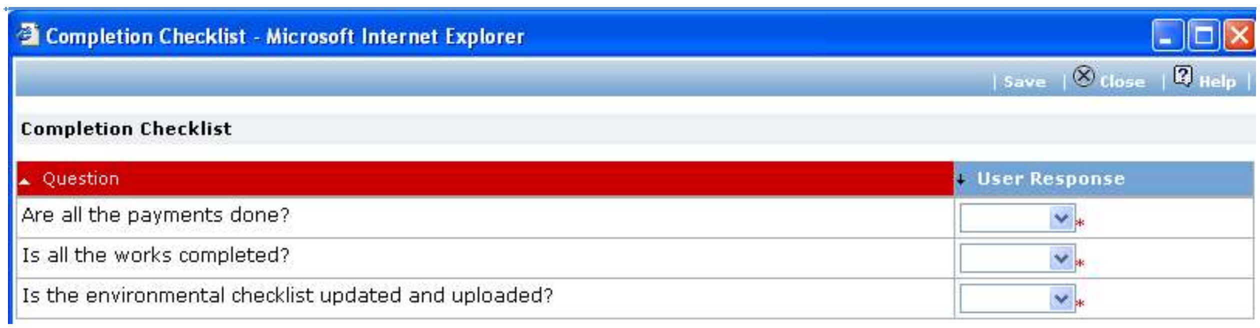
b. ‘Payments’ subtab is shown in the lower section. Click on the payment term name and update the details as per new terms.

Note: Only those payment terms are editable which do not have any actual completion date

c. Select ‘Yes’ in the ‘Amendment Complete?’ field.

d. Click ‘Save’. This will complete the amendment process. After completing the amendment user can continue to track WCC and Payments.

37. Once all the details for all the payments are recorded this Procurement can be marked as complete. Click on ‘Completion Checklist’, checklist will be seen



c. Fill in the completion checklist

d. Click ‘Save’

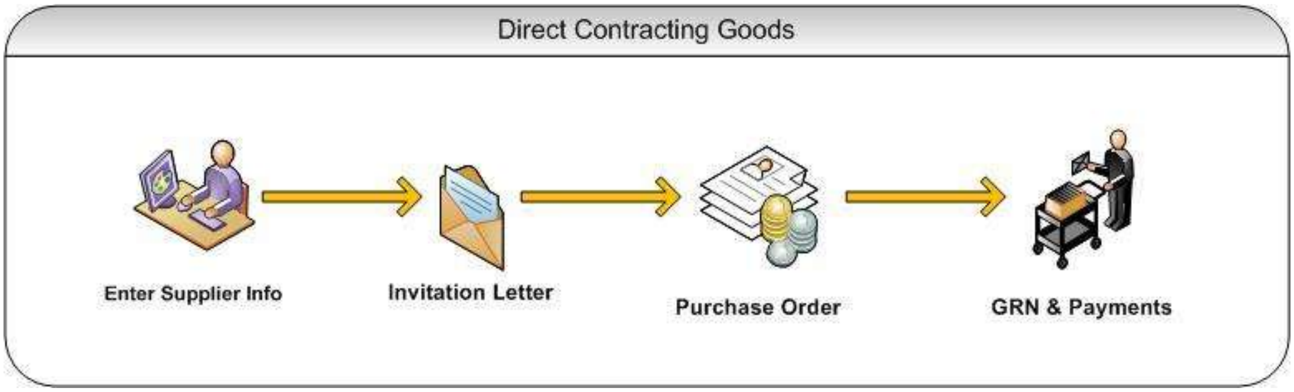
38. Click on ‘Complete Procurement Process’ this will complete the procurement for that Package.

Direct Contracting

Purpose

To perform procurement of goods using Direct Contracting method.

Process flow



Role(s)

- Procurement Coordinator (institution)

Prerequisite

- Package to be procured should fall under category goods/ civil works.

Process Details

Direct Contracting is similar to Shopping except;

- Quotations are invited from only one supplier/ contractor. Thus the condition on minimum three suppliers/ contractors does not exist for Direct Contracting.
- Quotation Opening and Quotation Evaluation steps are not present for Direct Contracting.

GEM

Process Details

GEM is similar to Direct Contracting except;

- If Evaluated Cost is <= $30,000 it Acts as Direct Contract
- If Evaluated Cost is > $30,000 it Acts as Shopping process.

Chapter

5

COMPETITIVE BIDDING METHOD

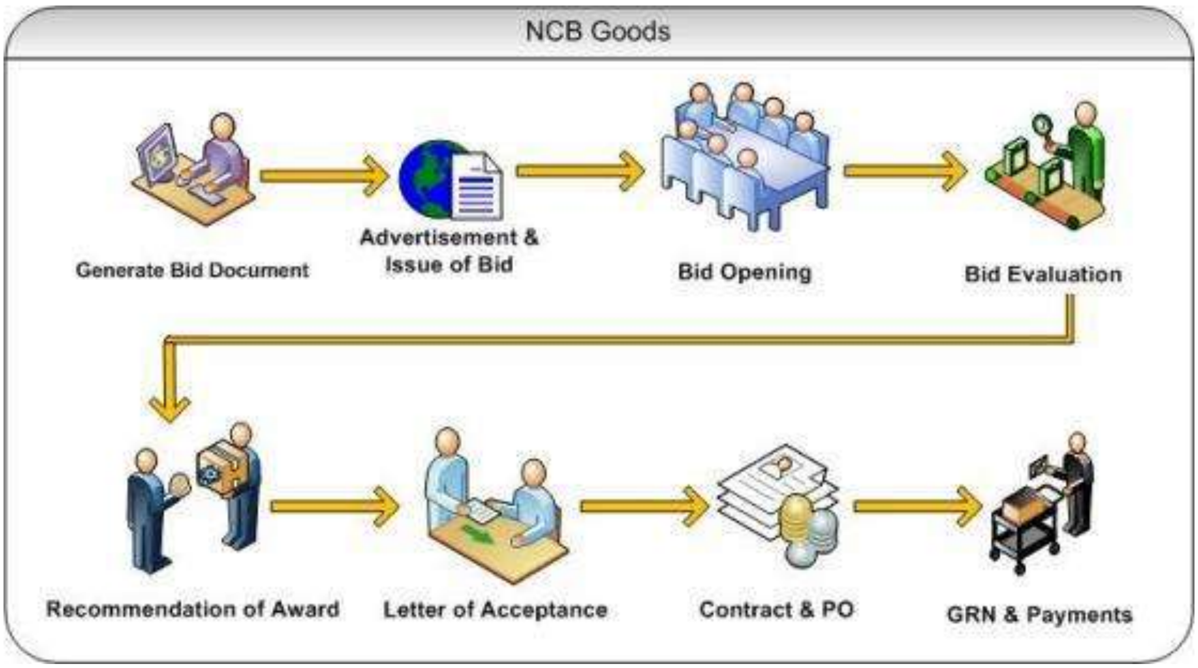
Procurement Using NCB/ ICB/ LIB Method

NCB Goods

Purpose

To perform procurement of goods using NCB method.

Process flow



Role(s)

- Procurement Coordinator (institution)
- Procurement Coordinator (SPFU) – Performs Prior review, when applicable.
- Procurement Coordinator – NPIU's procurement coordinator, Performs Prior review, when applicable.

Prerequisite

- Package to be procured should fall under category goods.
- Value of the package should be > USD 20,000 and Less than USD 300,000.
    - For value range US$ 100,000 up to US$ 200,000, prior review is done by SPFU
    - For value range US$ 200,000 up to US$ 300,000, prior review is done by NPIU also.

Process Details

First stage of NCB is '**Gen. of Bid**'.

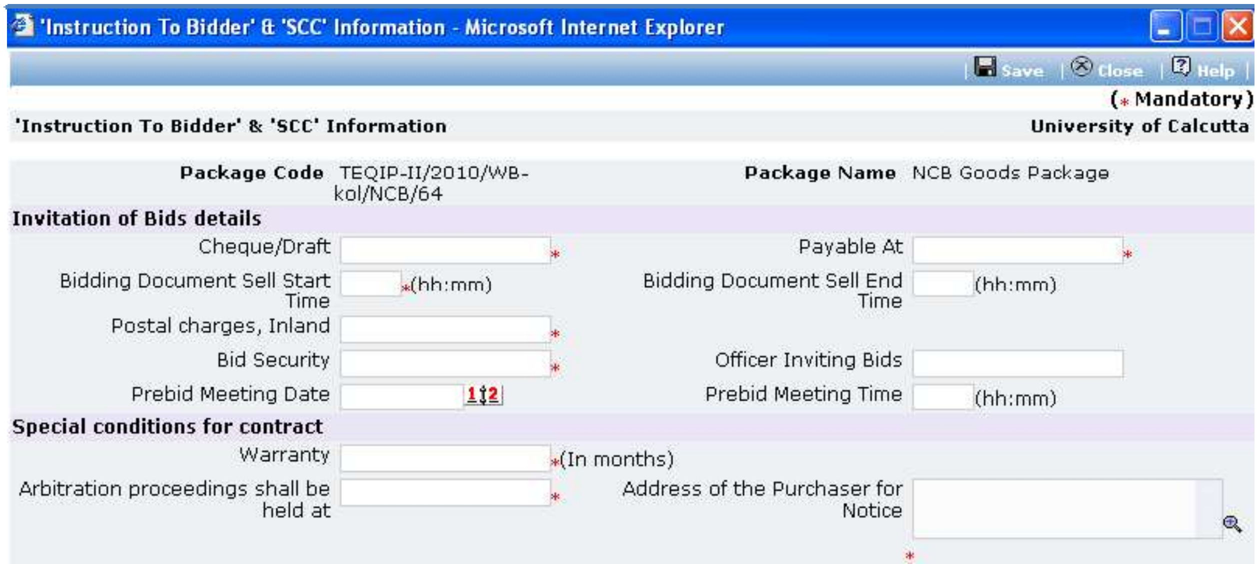
Gen of Bid

In this stage Standard Bidding Document is generated

1. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Start Date of Sale of SBD	Enter the date on which SBD sale will start. Date format is DD/MM/YYYY	15
2	Last Date for receipt of Bids	Will be auto populated as 30 days from start of sale date. Edit the date, if required. Date format is DD/MM/YYYY and time format is HH:MM, 24 hrs format.	12/03/2011 16:00
3	Last Date of Sale of SBD	Will be auto populated and will match the Last Date for receipt of Bids	
4	Date of opening of Bids	Will be auto populated and will match the Last Date for receipt of Bids	
5	Validity of Bid	Will be auto populated as 90 days	
6	Bid Security Validity	Will be auto populated as 134 days	
7	Cost of Bid Document	Enter the price of Bid document	

2. Click 'Save'
3. Click on 'Step 2: Enter Bidder Instruction & SCC Information' a pop up will be seen



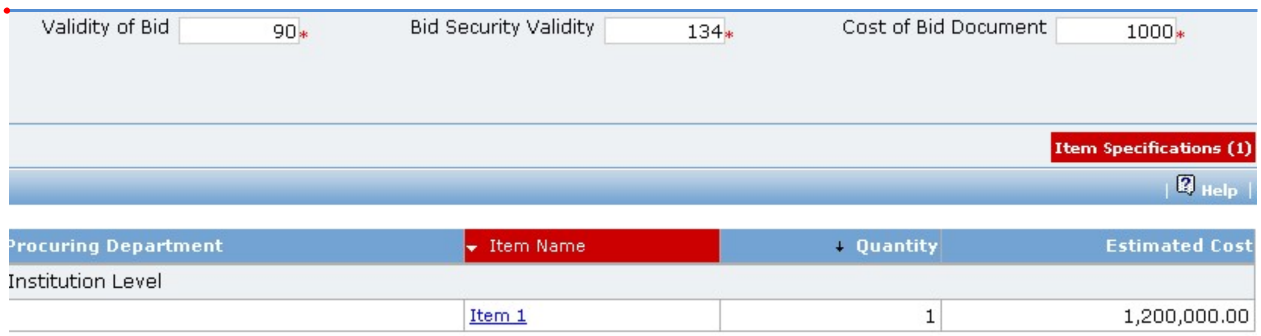
a. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Cheque/Draft in favour of	Mention the name that has to be put on the cheque/ draft for purchase of complete bidding document	CSL NIT
2	Payable At	Mention where draft should be payable	Delhi
3	Bidding Document Sell Start Time	Mention office hrs, start time when bid doc can be obtained. Time format is HH:MM, 24 hrs format	9:00
4	Bidding Document Sell End Time	Mention office hrs, end time till when bid doc can be obtained. Time format is HH:MM, 24 hrs format	18:00
5	Postal charges, Inland	Mention postal charges in Rs	230
6	Bid Security	Mention bid security amount in Rs. It should be within 2% to 5% of estimated cost of package	36000
7	Officer Inviting Bids	Mention the name of the officer	Mr. Mohan Lal
8	Prebid Meeting Date	If Prebid meeting is planned then enter the date. Date format is DD/MM/YYYY	12/08/2011
9	Prebid Meeting Time	Enter Prebid meeting time. Time format is HH:MM, 24 hrs format	12:00
10	Warranty	Enter the warranty period in months	12
11	Arbitration proceedings shall be held at	Mention the place	
12	Address of the Purchaser for Notice	Mention the address	
13	Liquidated	Will be auto populated as 0.01%. Edit this field,	

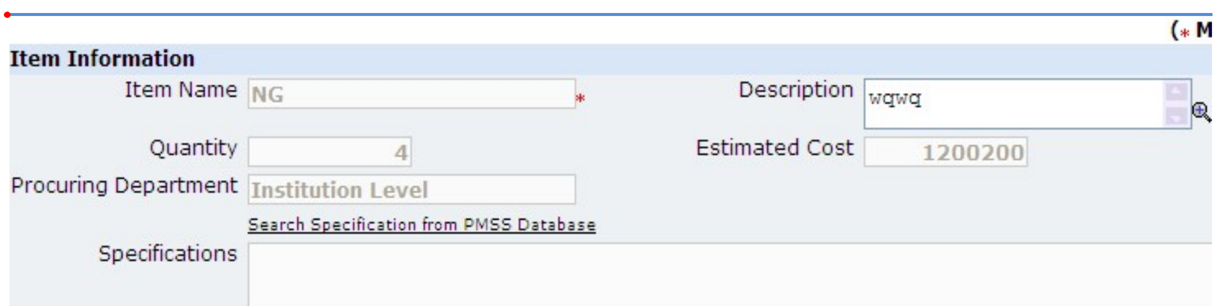
	Damages (Per Day)	if required. Value in this field will be used to calculated the Liquidated damages per day incase of any completion delays.	
14	Liquidated Damages (Maximum)	Will be auto populated as 10%. Edit this field, if required. Value in this field will be used to calculated the maximum amount of liquidated damages applicable	

b. Click 'Save'

4. Click on 'Step 3: Enter Item Details' link. 'Item Specifications' subtab will be seen in the lower section



a. Click 'Item Name', a popup will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

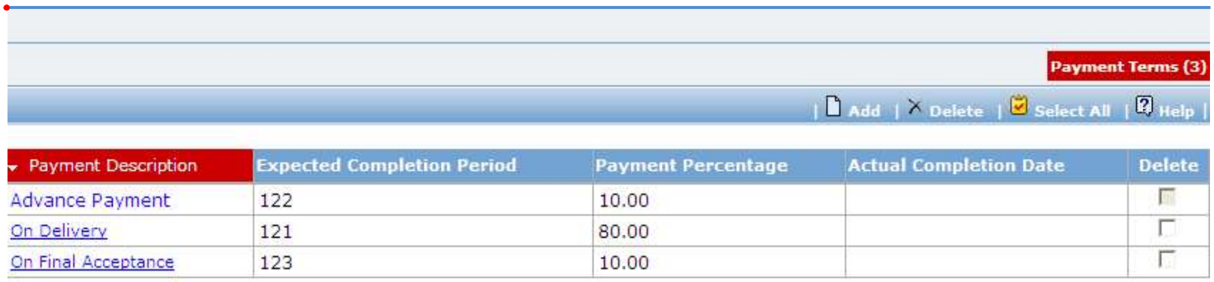
Sr. No.	Field Name	Field Description	Sample Data
1	Specifications	Enter the item specification. Click on 'Search Specification from PMSS Database' link to get specifications from other items.	

c. Click 'Save'

d. If there is more than one item then, repeat steps from a. to c.

5. Click on 'Step 4: Add/View Payment Terms' link. 'Payment Terms' subtab will be seen in the lower section.

a. By default three Payment Terms are shown



b. Click on the payment term name a pop up will be seen

c. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Completion Period	Mention the period in which this delivery is expected once the contract is signed.	30
2	Payment Percentage	By default percentage will be show, edit the percentage if required	10

d. Click 'Save'.

e. To add another payment term repeat steps from a. to c.

6. Click on 'Step 5: Define Question, If Required' link. **(This is an optional step, to be performed only if additional evaluation/ post qualification questions are required)**. 'Questions' subtab is shown in the lower section.

a. Click 'Add', which is within the subtab. A pop up will be seen

b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Question	Enter the description of the question to be asked during quotation evaluation/ post qualification. Form the question such that response (answer) is Yes/ No/ NA.	Does the supplier have a local service center?

2	Non Responsive Value	Select the value (Yes/ No/ NA) based on which the supplier will become non- responsive.	E.g. if the question is ‘Does the Contractor have a local service center?’ then the non- responsive value could be ‘No’.

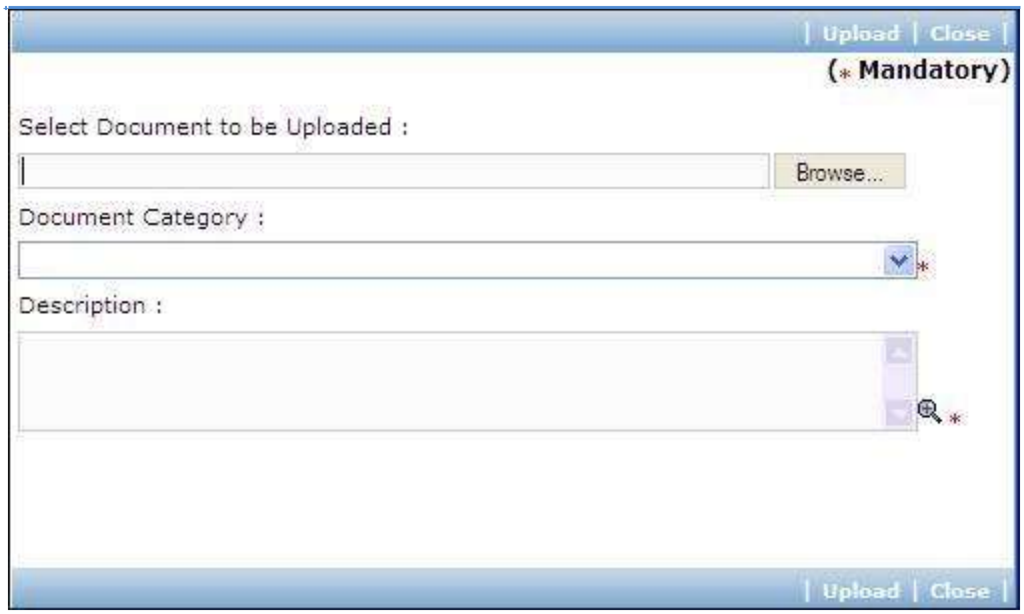
c. Click ‘Save’.

d. To add another Question repeat steps from a. to c.

7. Click on ‘Step 6: Generate SBD’ link. System will give an option to Open/ Save the SBD. Save the SBD on your computer with a proper name. Update the sections highlighted in yellow and save the document.

8. Click on ‘Step 7: Upload SBD Document’ link. ‘Documents’ subtab will be seen in the lower section

a. Click ‘Add’, which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Standard Bidding Document
3	Description	Enter more information about the uploaded document.	SBD

c. Click ‘Upload’ to upload the document in the system.

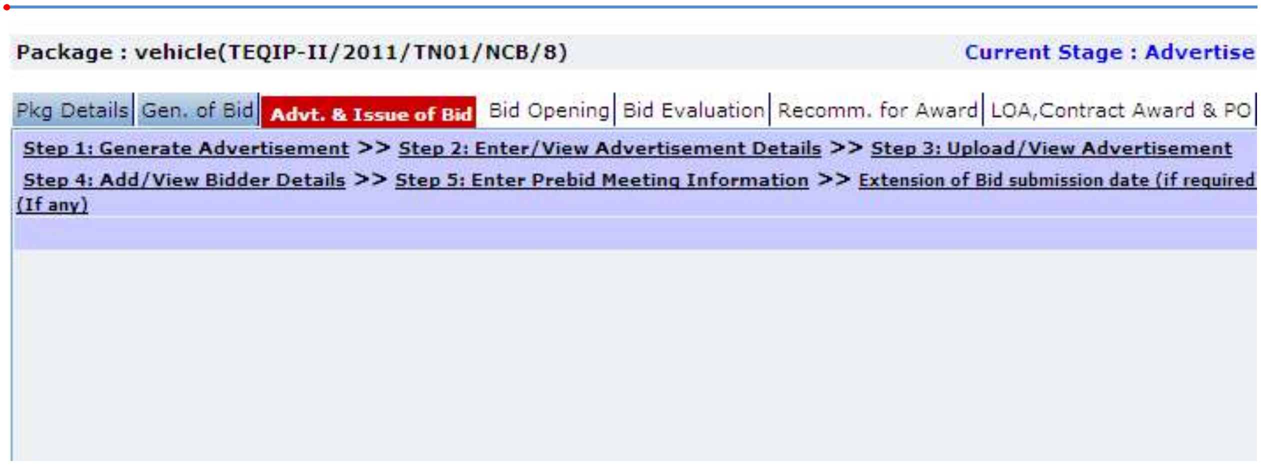
d. Uploaded document will appear on the list shown in ‘Documents’ section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

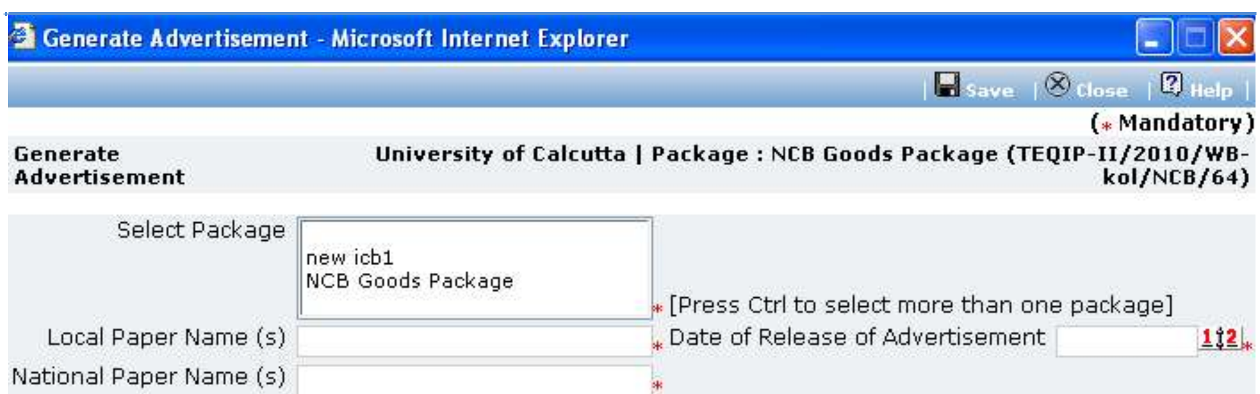
9. On completion of ‘Gen of SBD’ stage click on ‘Move to Next Stage’. This will move the procurement to ‘**Advertisement & Issue of Bids**’ stage.

Advertisement & Issue of Bids

In this stage tender is floated and info of supplier purchasing bid is captured, if available



10. Click on ‘Step 1: Generate Advertisement’. A pop up will be seen



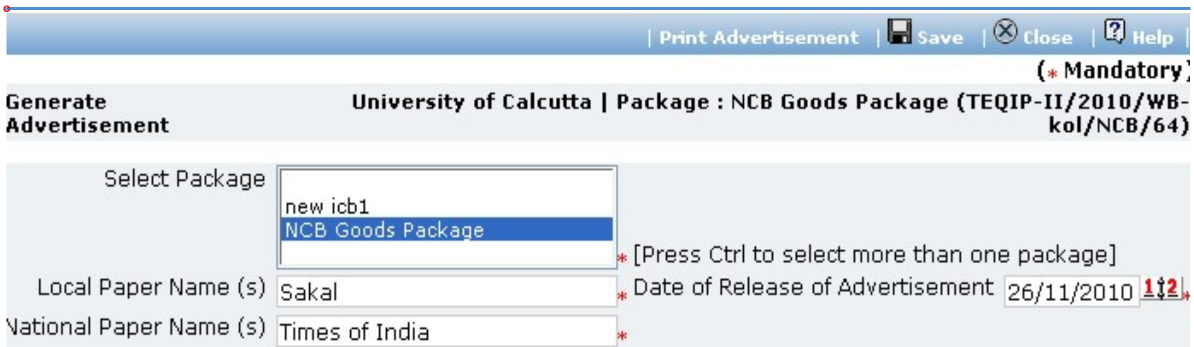
a. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Select Package	All the packages which are in Advt. Stage will be displayed. Press control button on the keyboard to select more than one package.	
2	Local Paper Name(s)	Enter the name of the local paper in which this advertisement will be printed	Lokamat

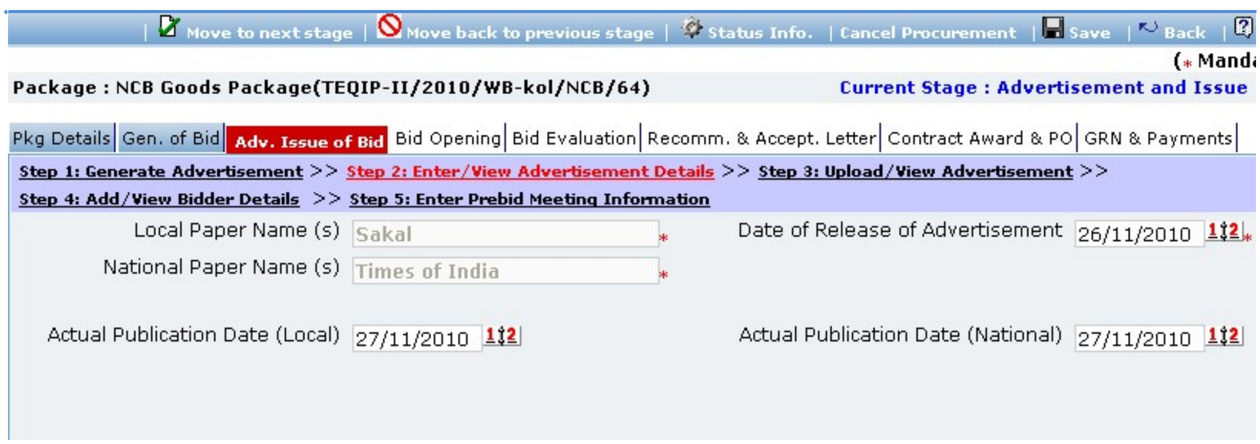
3	National Paper Name(s)	Enter the name of the national paper in which this advertisement will be printed	Times of India
4	Date of Release of Advertisement	Enter the date in format DD/MM/YYYY	12/09/2011

b. Click 'Save'

c. 'Print Advertisement' link will be seen, click on this link to generate the advertisement.



11. Click on 'Step 2: Enter/View Advertisement Details'.

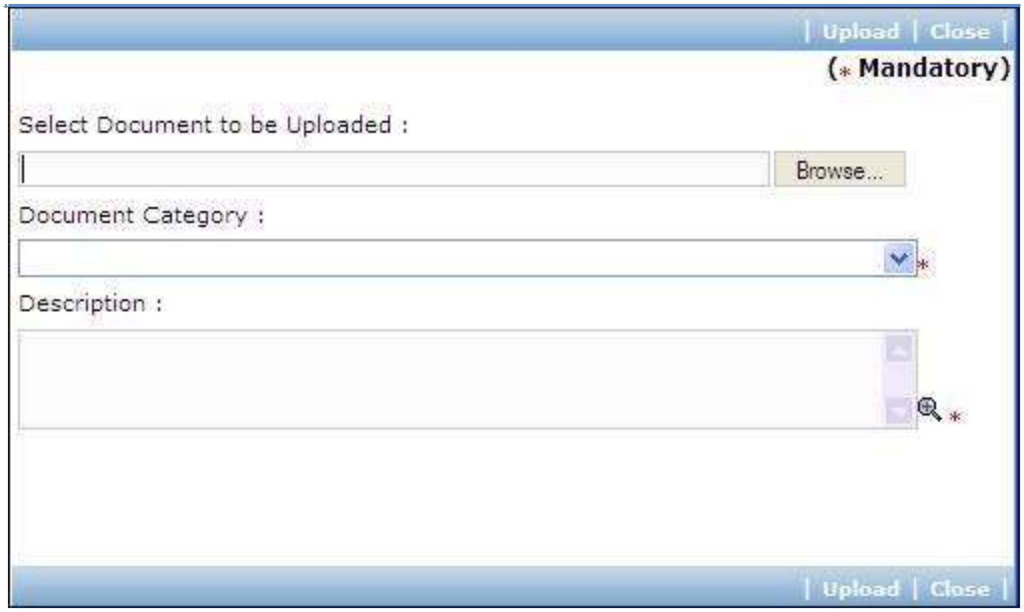


12. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Actual Publication Date (Local)	Enter the date when Advertisement was actually published in the Local paper. Date format is DD/MM/YYYY	16/09/2011
2	Actual Publication Date (National)	Enter the date when Advertisement was actually published in the N paper. Date format is DD/MM/YYYY	16/09/2011

13. Click 'Save'

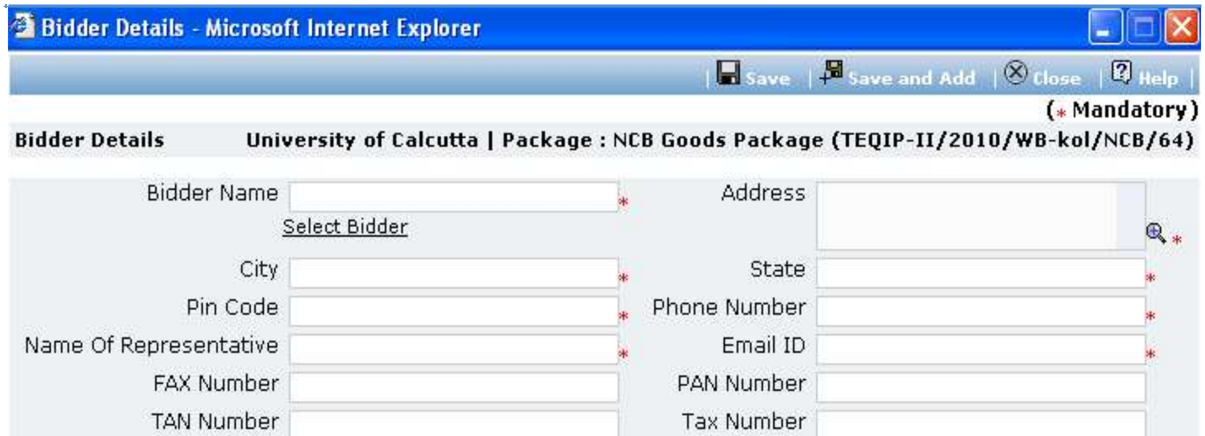
14. Click on ‘Step 3: Upload/View Advertisement’ link. ‘Documents’ subtab will be seen in the lower section
    a. Click ‘Add’, which is within the subtab. A pop up will be seen



    b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Copy of Advertisement
3	Description	Enter more information about the uploaded document.	

    c. Click ‘Upload’ to upload the document in the system.
    d. Uploaded document will appear on the list shown in ‘Documents’ section.
    e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.
15. Click on ‘Step 4: Add/View Bidder Details’ link. ‘Bidder Details’ subtab will be seen in the lower section
    a. Click ‘Add’, which is with the subtab a pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Bidder Name	Enter the Bidder name. Bidder can also be searched using ‘Select Bidder from PMSS Database’ link. Click on this link will display the existing list of Bidders, if any. Once the list is displayed click on the Bidder’s name this will auto populated the selected Bidder’s data. To search additional Bidders within the state or city use the filters provided on the page	FTTI Pvt Ltd
2	Address	Enter the address of the Bidder	STI Towers, Unit# 141/38, Campus 29. RMZ Millenia Business Park. 881, Dr. MGR Road
3	City	Enter the city of the Bidder	Pune
4	State	Enter the state of the Bidder	Maharashtra
5	Email ID	Enter the Email ID of the Bidder	ftti@efttil.com
6	Pin Code	Enter the Pin Code of the Bidder	411232
7	Name Of Representative	Enter the Representative of the Bidder	Mr. Mohan Solanki
8	Phone Number	Enter the Phone Number of the Bidder. To enter more than one number use comma (,) as a separator.	26422689
9	PAN Number	Enter the PAN Number of the Bidder	ANS44874
10	TAN Number	Enter the TAN Number of the Bidder	
11	Tax Number	Enter the TAX Number of the Bidder	

c. Click ‘Save’

d. To add another Supplier repeat steps from a. to c.

16. Click on 'Step :5 Enter Prebid Meeting Information' link (This link will be shown only if Prebid Date and Prebid Time fields are added in 'Instruction to Bidder & SCC Information Popup'). A popup will be seen

a. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Actual Date of Prebid meeting	Enter the date when prebid was actually conducted. Date format is DD/MM/YYYY	22/09/2011
2	Pre-bid Meeting Clarification Issued Date	Enter the date when clarification was issued. Date format is DD/MM/YYYY	23/09/2011
3	Was there any Corrigendum and Addendum?	Select Yes/ No	Yes
4	Is Clarification issued to all Bidders	Select Yes/ No	Yes
5	Prebid MOM	Enter the MoM. Larger MoM can also be uploaded in the documents tab	

b. Click 'Save

17. Incase of extension to bid submission date, Click on 'Extension of Bid submission date (if required)' link. A popup will be seen.

a. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Current Submission Date	System will show the current date	
2	Extended Date	Enter the new date. Date format is DD/MM/YYYY	22/09/2011
3	Reason for Extension	Enter the reason	

b. Click 'Save'

18. Incase of Corrigendum, Click on 'Upload Corrigendum (If any)' link and upload the documents

19. On completion of 'Advertisement & Issue of Bids' stage Click on 'Move to Next Stage'. This will move the procurement to '**Bid Opening'** stage.

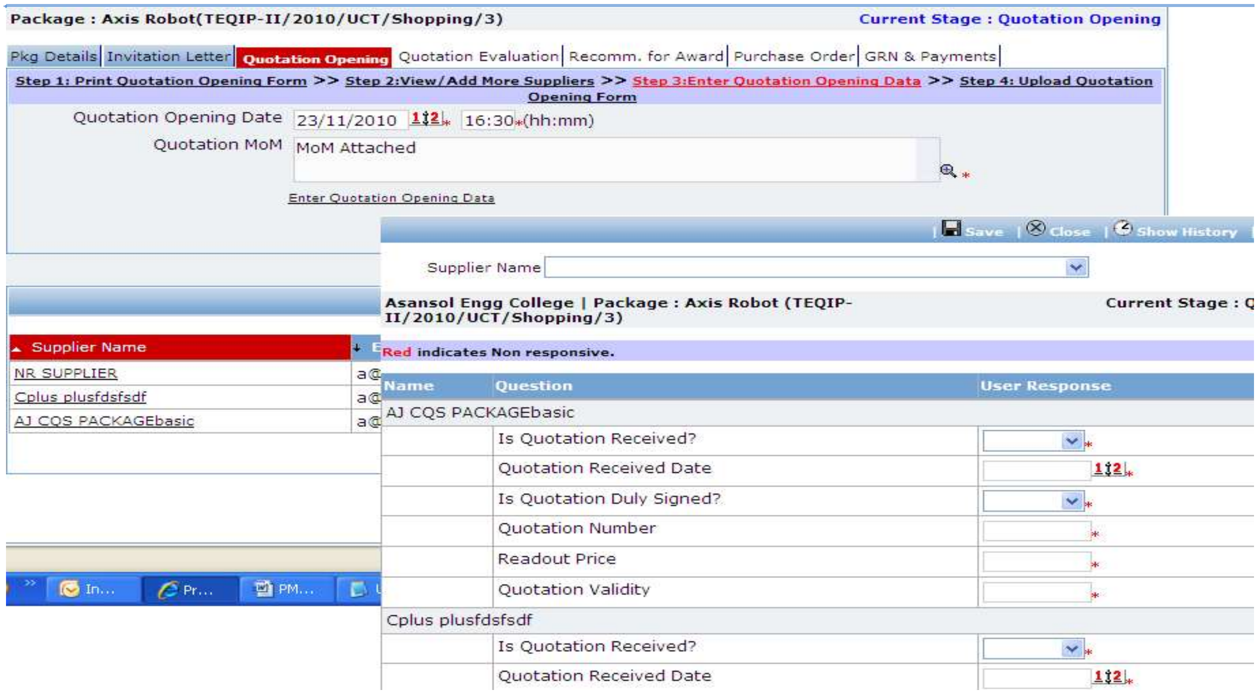
Bid Opening

In this stage Bid opening is performed and responsive bids are identified.

20. On the 'Bid Opening' tab click on 'Step 1: Add/View Bidder Details' link. Repeat point 15, if required.
21. Click on 'Step 2: Print Bid Opening Form'. This will open a Bid opening form. This form can be used during Bid Opening. Print of this form can be taken and Bid opening details can be recorded on this form. The bidder names (which were added) are seen on this form against which Bid opening details can be mentioned. Three extra columns are provided to accommodate names of any new bidders who have submitted their Bids directly.
22. Click on 'Step 3: Enter/ View Bid Opening Data' and Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Bid Opening Date	Enter the actual date and time when Bid was opened. Date format is DD/MM/YYYY and time format is HH:MM, 24 hrs format. It is recommended that opening should be done at the start of the week so that there is ample time to enter opening data in PMSS.	12/03/2011 16:00
2	Bid MoM	Enter the Minutes of Meeting. Larger MoM's can be uploaded using the documents subtab	

23. Click 'Save'
24. Click on the 'Enter Bid Opening Data' link. A pop up will be seen

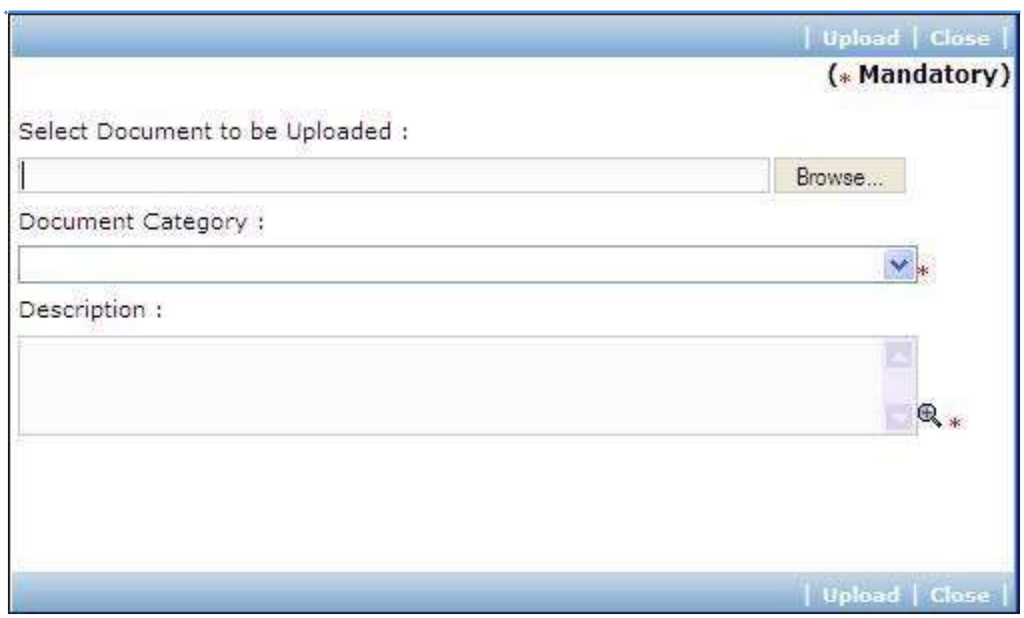


c. Enter the Responsiveness Criteria.

d. Click ‘Save’.

25. Click on ‘Step 4: Upload Bid Opening Document & MOM’ link. ‘Documents’ subtab will be shown in the lower section.

a. Click ‘Add’, which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr.	Field Name	Field Description	Sample Data

No.			
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Bid Opening Form
3	Description	Enter more information about the uploaded document.	Signed Bid Opening Form

c. Click 'Upload' to upload the document in the system.

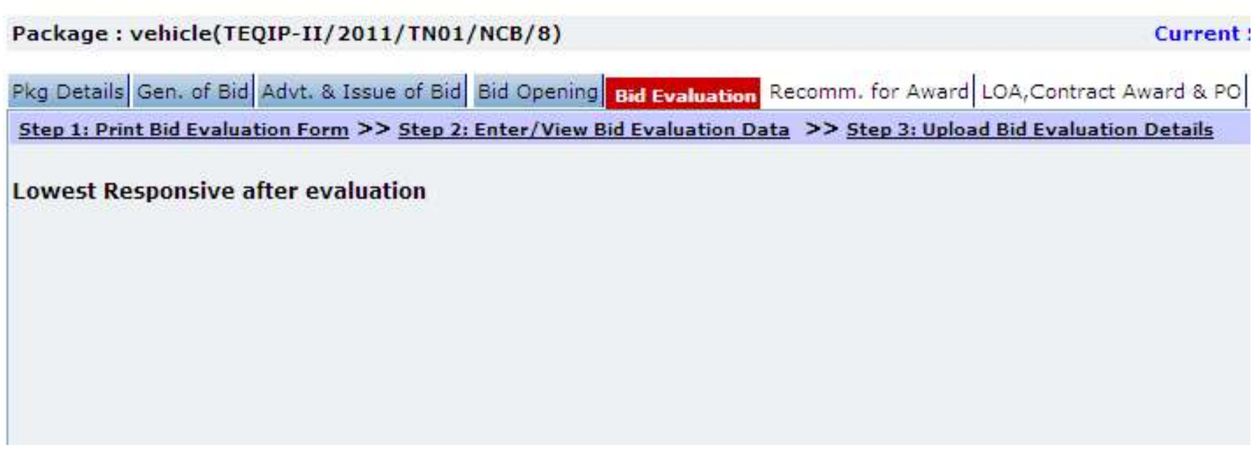
d. Uploaded document will appear on the list shown in 'Documents' section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

26. On completion of 'Bid Opening' stage click on 'Move to Next Stage'. This will move the procurement to '**Bid Evaluation**' stage.

Bid Evaluation

In this stage evaluation is performed and lowest evaluated bidder is identified.



27. On the 'Bid Evaluation' tab click on 'Step 1: Print Quotation Evaluation Form'. This will open a bid evaluation form. This form can be used during Bid Evaluation. Print of this form can be taken and Bid Evaluation details can be recorded on this form.

28. Click on the 'Step 2: Enter/ View Bid Evaluation Data' link. A pop up will be seen

a. Enter the comparative data for all the bidders.

b. Click 'Save'.

c. Click on 'Quotation Details' link, which is in front of each responsive supplier. A popup will be seen.

d. Fill the fields on the page. Details of the fields are mentioned below;

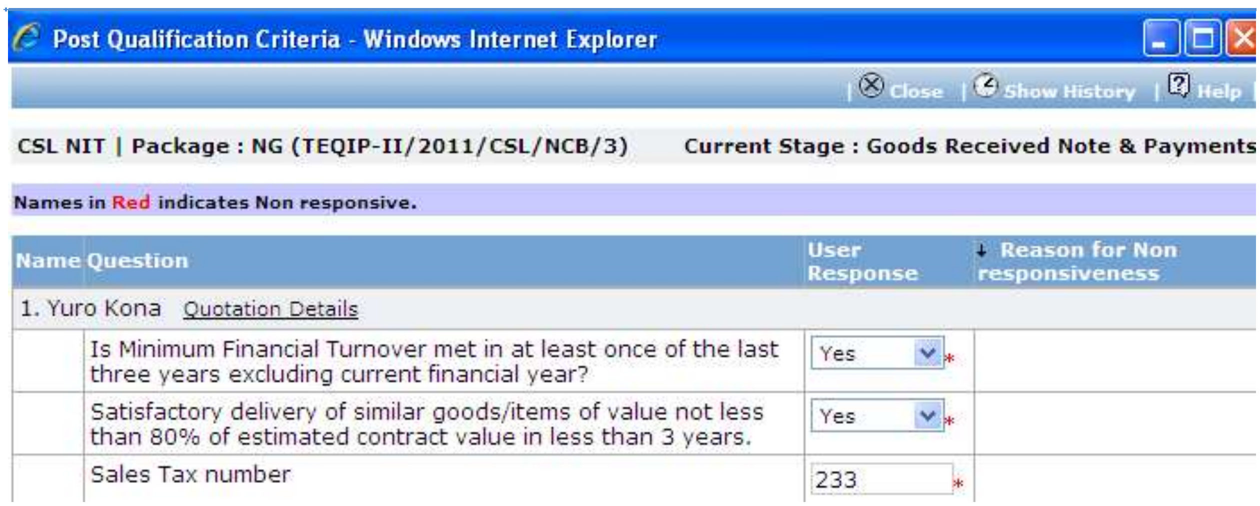
Sr. No.	Field Name	Field Description	Sample Data
1	Basic Cost per unit	Basic cost for each item can be entered in this field. Enter the basic cost per item as given by the supplier	2000
2	Comments	Enter comments, if any	

e. Click on ‘Save’

f. Quotation details of all responsive Bidders can be entered by repeating steps from c. to e.

29. System will show the lowest evaluated responsive bidder (L1) on the main page.

30. Click on ‘Perform Post Qualification’ link, which is in front of the bidder name. A pop up will be seen



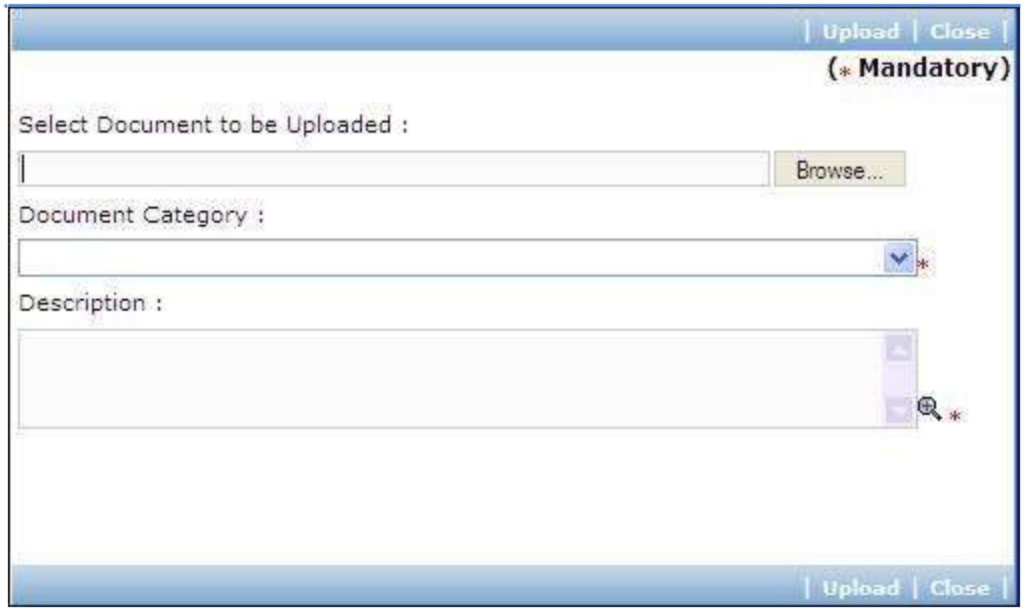
a. Enter the post qualification details

b. If the bidder becomes non-responsive in this step then automatically next lowest evaluated bidder will be seen.

c. Repeat the Post Qualification process for this Bidder.

31. Click on ‘Step 3: Upload Bid Evaluation Details’ link. ‘Documents’ subtab will be shown in the lower section.

a. Click ‘Add’, which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Bid Evaluation Form
3	Description	Enter more information about the uploaded document.	Signed Bid Evaluation Form uploaded

c. Click 'Upload' to upload the document in the system.

d. Uploaded document will appear on the list shown in 'Documents' section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

32. On completion of 'Bid Opening' stage click on 'Move to Next Stage'. This will move the procurement to '**Recommendation for Award**' stage.

Recommendation for Award

In this stage appropriate responsive bidder can be recommend. If the lowest evaluated responsive bidder (L1) is not acceptable by the committee then another bidder can be selected in this stage

33. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	L1 Bidder	If the lowest evaluated responsive bidder (L1) is not acceptable by the committee then another contractor can be selected	
2	Recommendation Comments	Enter the comments	

34. Click on 'Step 2: Generate Bid evaluation Report' link. System will give an option to Open/ Save the Bid evaluation Report. Save the report on your computer with a proper name. Update the sections highlighted in yellow and save the document.
35. Click on 'Step 3: Upload Bid Evaluation Report' link. 'Documents' subtab will be shown in the lower section.
    a. Click 'Add', which is within the subtab. A pop up will be seen

b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Bid Evaluation Report
3	Description	Enter more information about the uploaded document.	Signed Bid Evaluation report uploaded

c. Click ‘Upload’ to upload the document in the system.

d. Uploaded document will appear on the list shown in ‘Documents’ section.

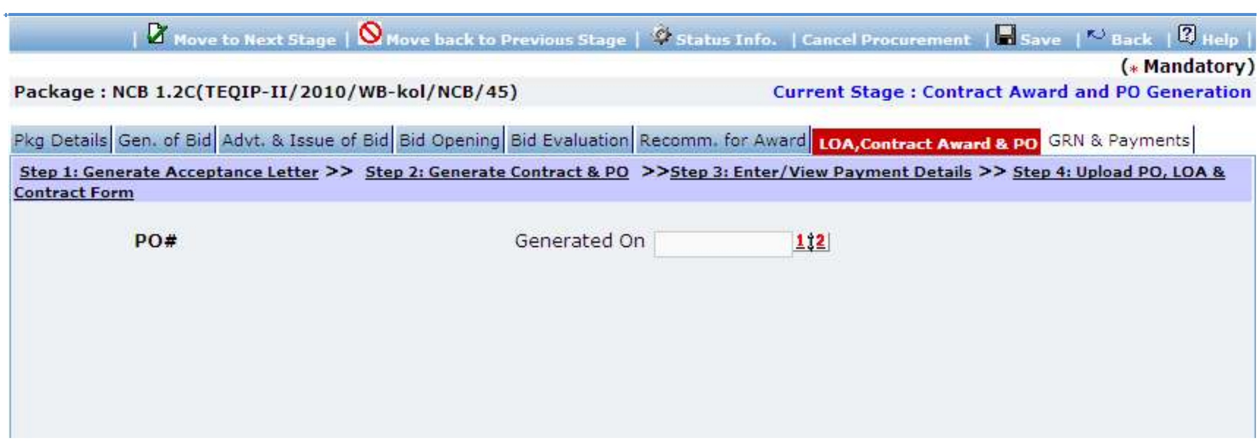
e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

Note: If the Contract price (i.e. Evaluated Price) is more than 25% of the estimated price then the package will be sent for prior review. Once the user clicks on ‘Move to Next Stage’ system will ask for a confirmation before sending the package for prior review.

36. On completion of ‘Recommendation for Award’ stage Click on ‘Move to Next Stage’. This will move the procurement to ‘**LOA, Contract Award and PO**’ stage.

LOA, Contract Award and PO

In this stage LOA, Contract Award and PO are generated and Payment terms are updated.



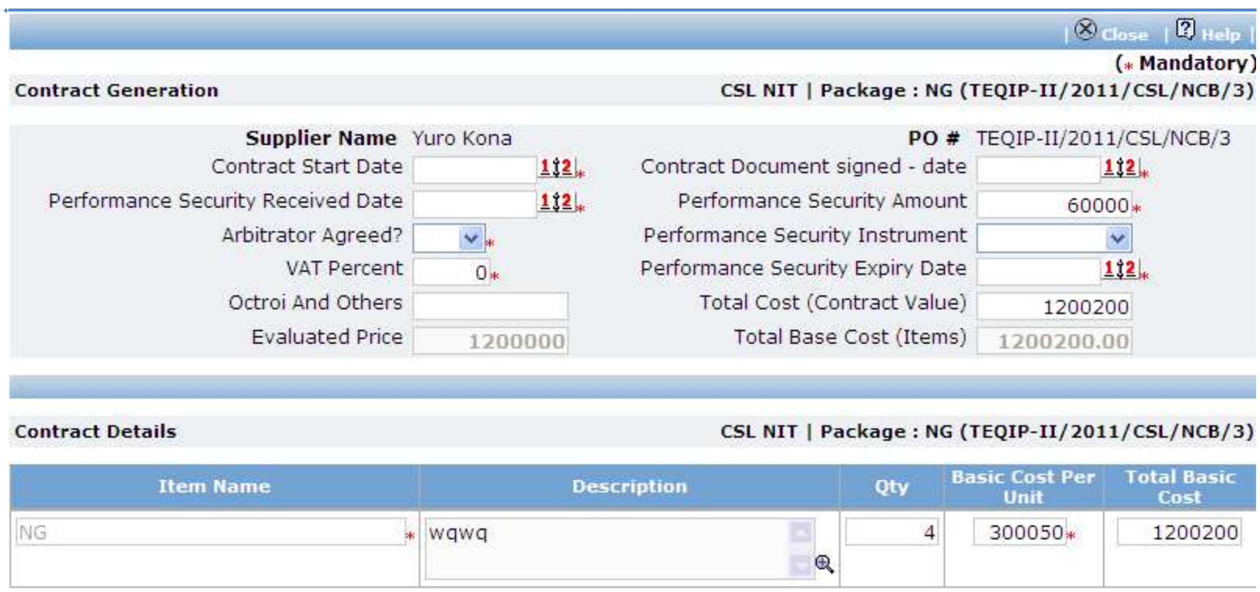
37. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	LOA Generated Date	System will show the current date (i.e. today's date) by default. Click on 'Save'	Today's Date

38. Click 'Save'

    Note: If Generated date is greater than the bid validity (i.e. difference between Bid opening date and Generated date is more than the bid validity given by the selected supplier) system will ask to provide a new bid validity. Enter the total new bid validity. E.g. if original validity was 90 days and contractor has extended it by 30 days then enter 120 days.

39. Click on 'Step 2: Generate Letter of Acceptance' link. System will give an option to Open/ Save the LOA. Save the LOA on your computer with a proper name. Update the sections highlighted in yellow and save the document.
40. Click on 'Step 3: Generate Contract & PO' link. A Pop up will be seen



a. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Performance Security Received Date	Enter the date when Performance Security was received from the bidder. Date format is DD/MM/YYYY	12/05/2011
2	Contract Document signed - date	Enter the contract signed date. Date format is DD/MM/YYYY	20/05/2011
3	Contract Start Date	Enter the date when contract is expected to start. Date format is DD/MM/YYYY	01/06/2011

4	Expected Delivery Date	Enter the date when delivery is expected to complete. Date format is DD/MM/YYYY	23/08/2011
5	Performance Security Amount	Will be auto calculated as 5% of the estimated cost. Edit the amount, if required.	36000
6	Arbitrator Agreed?	Select Yes/ No. Whether arbitrator is agreed or otherwise.	Yes
7	Performance Security Instrument	Select the Performance Security Instrument	DD
8	Performance Security Expiry Date	Enter the date when Performance Security will expiry. This date should be more than Expected Delivery Date + Warranty + 28 days	29/06/2013
9	GST Percent	Enter the Value added tax percentage	12
10	Octroi And Others	Enter amount in Rs	1600
11	Evaluated Price	Will be auto populated	System calculated
12	Total Base Cost (Item)	Will be auto calculated as (Qty*Basic Cost Per Unit)	System calculated
13	Qty	This field can be seen in the lower row, i.e. in the items section. Edit the Quantity if required. For NCB goods Quantity can be increase/ decrease by 15% of the planned quantity.	12
14	Basic Cost Per Unit	This can be seen in the lower row, i.e. in the items section. Edit the basic cost per unit as required.	
15	Total Cost (Contract Value)	Will be auto populated as (Total Base Cost (Item) + GST)	System calculated

b. Click ‘Save’

c. Click ‘Print PO’. System will give an option to Open/ Save the PO. Save the PO on your computer with a proper name. Update the sections highlighted in yellow and save the document.

d. Click ‘Print Contract’. System will give an option to Open/ Save the Contract. Save the Contract on your computer with a proper name. Update the sections highlighted in yellow and save the document.

41. Click on ‘Step 4: View/Update Payments details’ link. ‘Payments’ subtab will be seen in the lower section.

    a. Click on the payment term name

    b. Fill the fields on the page. Details of the fields are mentioned below;

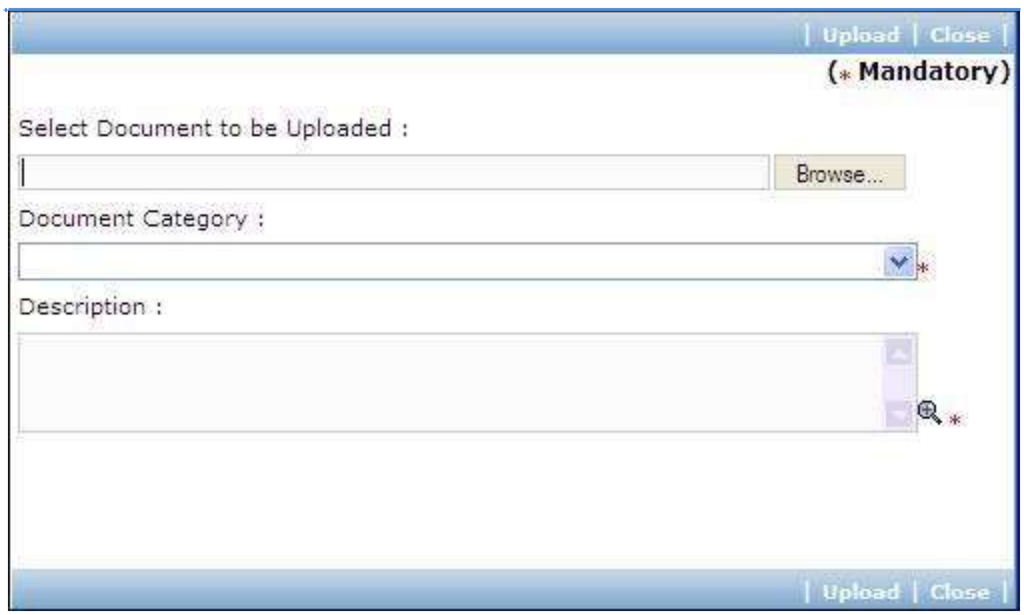
Sr. No.	Field Name	Field Description	Sample Data
1	Expected Completion Date	This is auto calculated as Contract Start Date + Expected Completion Period. Edit the date if required.	30
2	Expected Payment Date	Enter the expected date when payment will be made against this completion. Date format is DD/MM/YYYY	12/08/2011

c. Click 'Save'.

d. Update the other payment terms by repeating steps a.to c.

42. Click on 'Step 5: Upload PO, LOA & Contract Form' link. 'Documents' subtab will be shown in the lower section.

a. Click 'Add', which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Letter of Acceptance
3	Description	Enter more information about the uploaded document.	Signed LOA uploaded

c. Click 'Upload' to upload the document in the system.

d. Uploaded document will appear on the list shown in 'Documents' section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

f. To upload PO repeat Steps a. to c. (Select document category as ‘Purchase Order’)

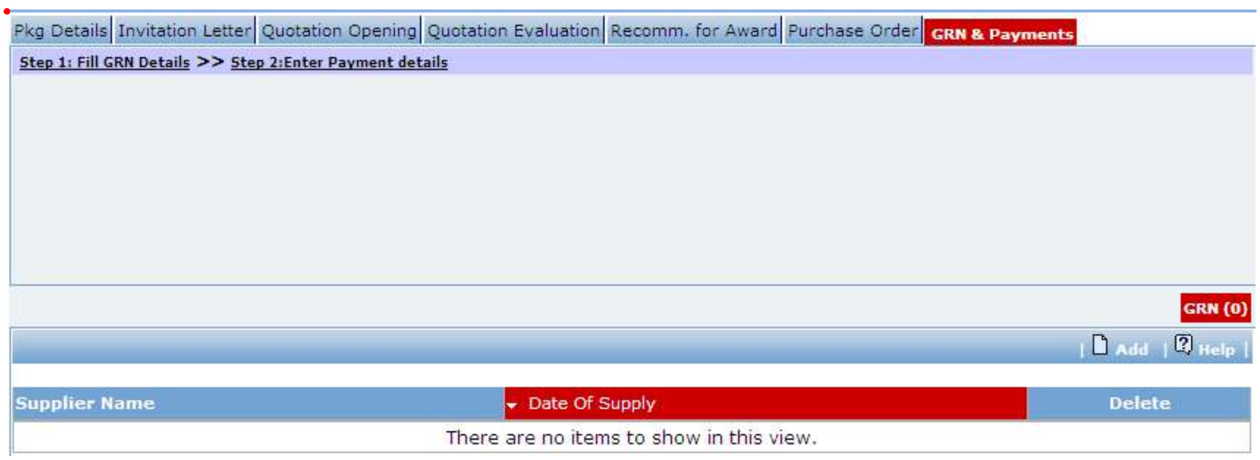
g. To upload Contract repeat Steps a. to c. (Select document category as ‘Contract Form’)

43. On completion of ‘LOA, Contract Award and PO’ stage Click on ‘Move to Next Stage’. This will move the procurement to ‘**GRN & Payments**’ stage.

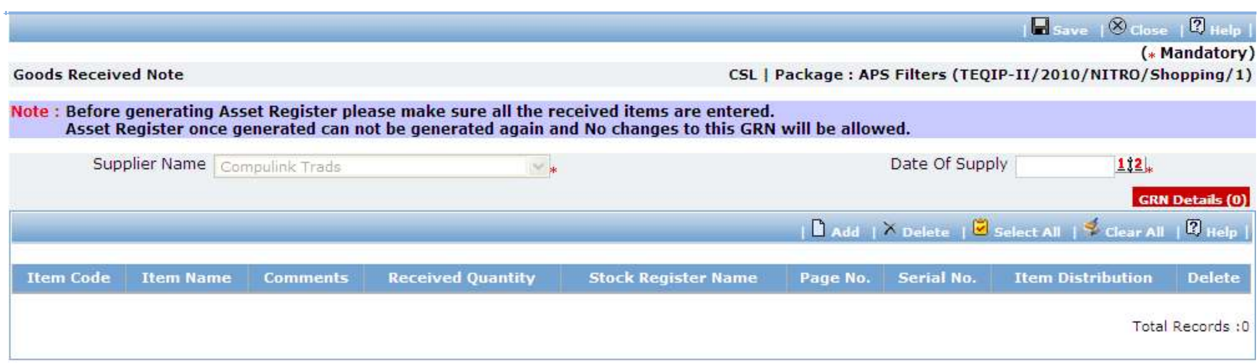
GRN & Payments

In this stage Goods received details are captured and Payment tracking is performed.

44. Click on ‘Setp1: Fill GRN Details’. ‘GRN’ subtab will be shown in the lower section;



a. Click on ‘Add’, a pop up will be seen;

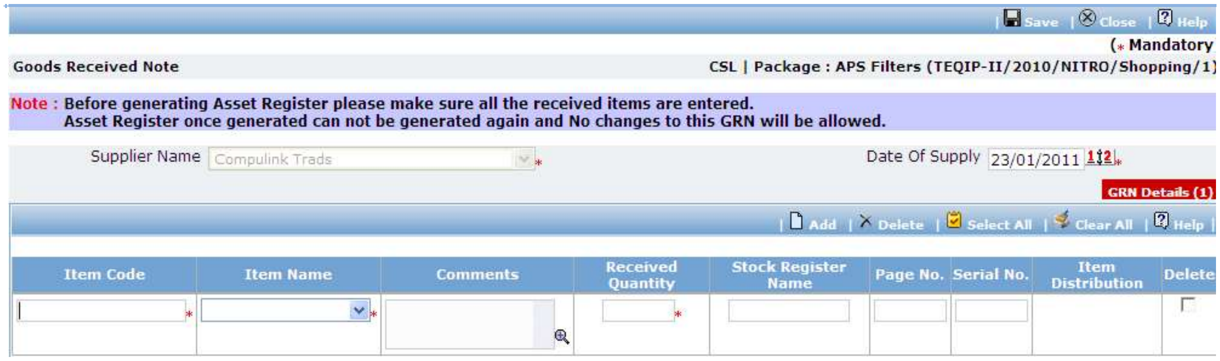


b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Supplier Name	This field is auto populated with the selected supplier’s name	System populated

2	Date of Supply	Enter the date when Goods are supplied. Date format is DD/MM/YYYY	12/8/2011

c. Click ‘Add’ link which is in the Items section.



d. Fill the fields on the page. Details of the fields are mentioned below;

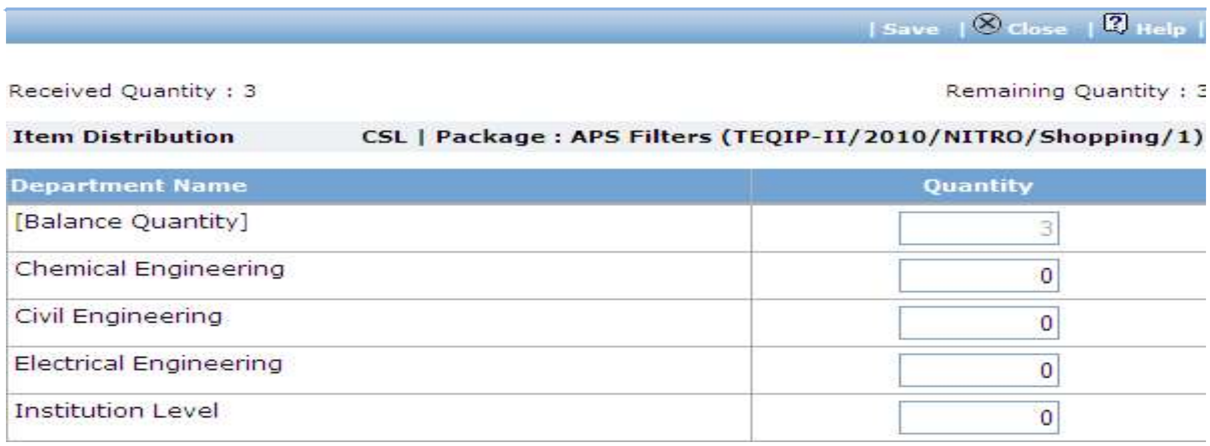
Sr. No.	Field Name	Field Description	Sample Data
1	Item Code	Enter a short (abbreviated) name for the item that is supplied	LMPrinter – can be a short name for item ‘LaserJet Monolithic Printer’
2	Item Name	Select the item that is supplied	LaserJet Monolithic Printer
3	Comments	Enter the comments, if required	Received ok
4	Received Quantity	Enter the quantity of item received	2
5	Stock Resistor Name	Enter the name of the resistor where the entry of this item is made for manual records	TEQIP – II stock resistor
6	Page No.	Enter the page number of the stock resistor on which this entry is made	32
7	Serial No.	Enter the serial number of this item	ABC Institution/ TEQIP – II/ LMP - 43

e. To add another Item repeat steps c. & d.

f. Click ‘Save’, which is on the upper bar of the main (GRN) section.

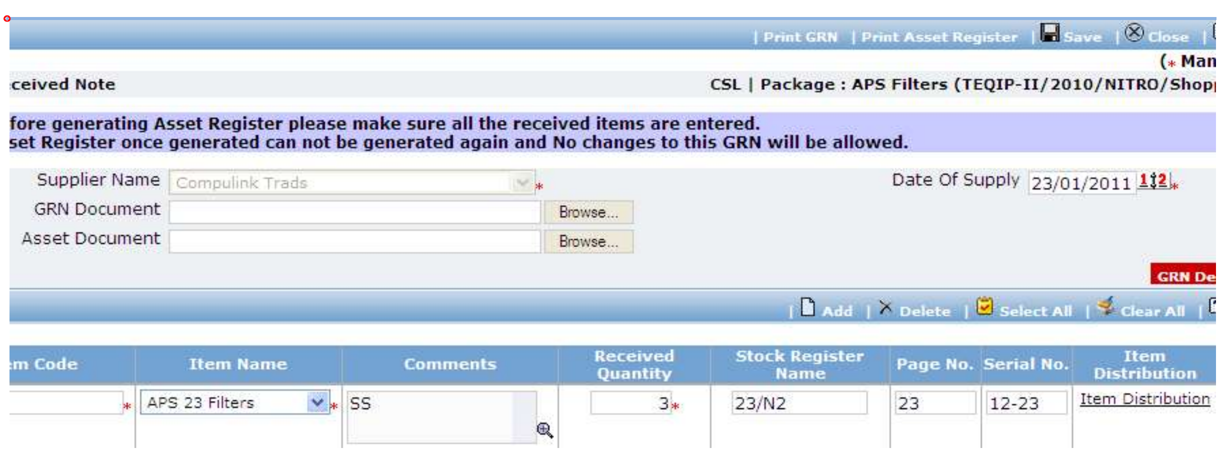
g. Once saved, ‘Item Distribution’ link will appear against each item.

h. Click on 'Item Distribution' link a pop up will be seen. Enter the **Actual** Quantity supplied to each department.

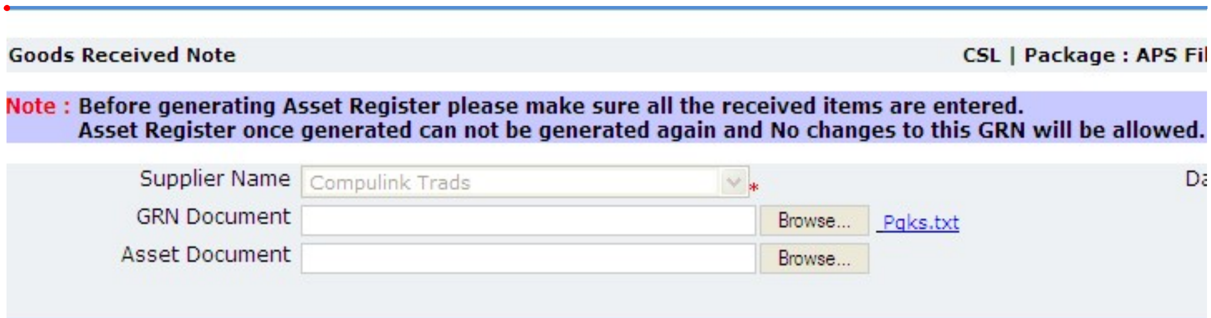


i. Click 'Save'.

j. Click on 'Print GRN', which is on the upper bar of the main (GRN) section. GRN Report will be generated.



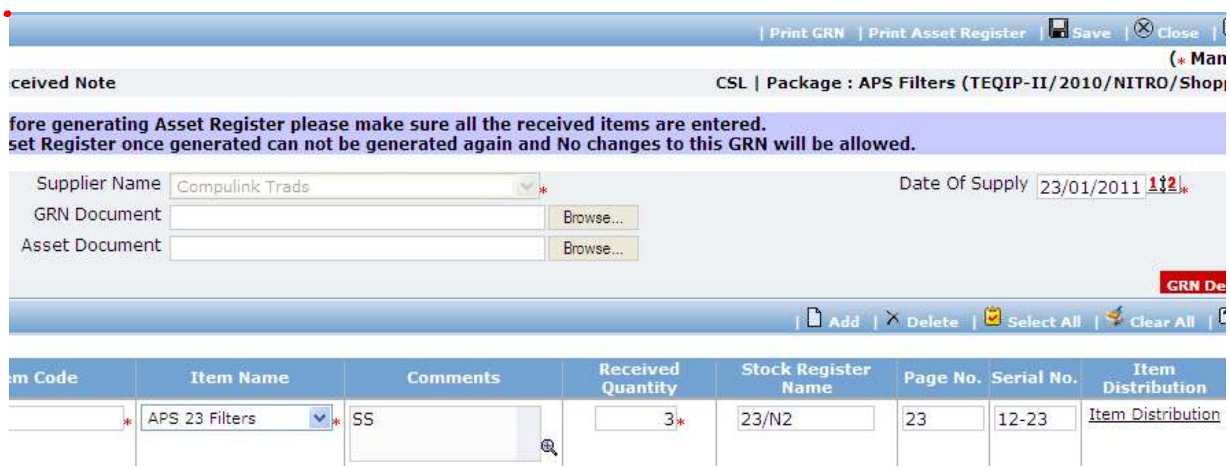
k. The GRN Report can be uploaded using the Browse function, which is in front of the 'GRN Document' field. Once uploaded, link will appear besides the browse function.



l. Report can be downloaded, if required by clicking on the link.

m. Click on 'Print Asset Register', which is on the upper bar of the main (GRN) section. Asset Register will be generated.

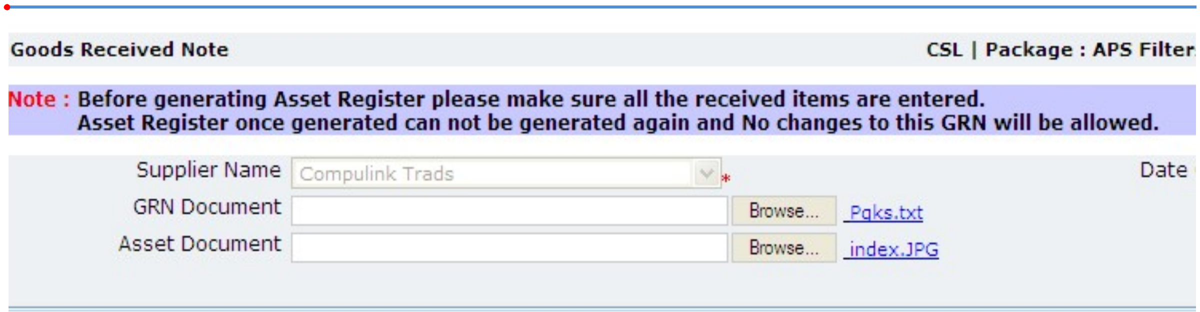
Note: Asset Register can be generated only once. System will give a warning message to confirm that all the items have been added etc. Once Asset Register is generated no changes can be made to that GRN record.



n. Fill the fields in the Asset Register. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Unique Number	Auto populated by the system based on the quantity of items received	
2	Model Number	Enter the model number of the item	HP LazerJet 3005
3	Serial Number	Enter the serial number of the item	

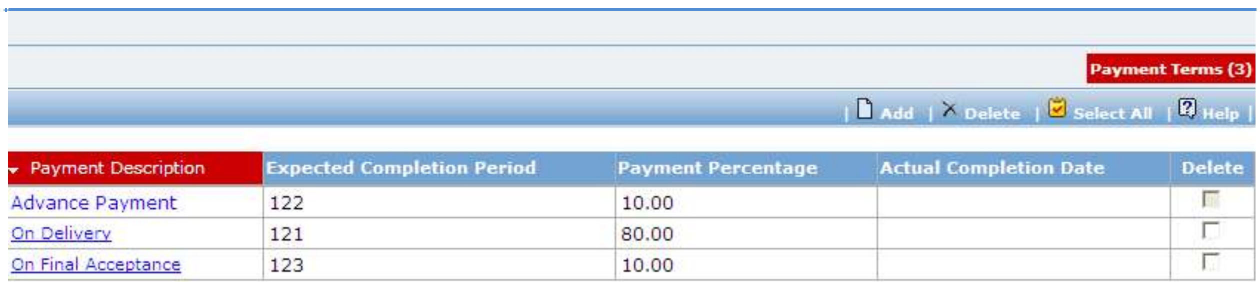
o. Once the Asset Register is filled it can be uploaded using the Browse function, which is in front of the 'Asset Document' field. Once uploaded, link will appear besides the browse function.



p. Asset Register can be downloaded by clicking on the link.

45. To add another record for GRN repeat steps from a. to p.

46. Click on 'Setp2: Enter Payment details'. 'Payments' subtab will be shown in the lower section;



a. Click on the Payment Term a pop up will be seen

b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Goods Received?	Check this box if goods are received against this payment	
2	Goods received note generated?	Check this box if GRN is generated for the received goods	
3	Actual Completion Date	Enter the actual date of delivery. Date format is DD/ MM/ YYYY	12/07/2011
4	Liquidated Damages Waived?	Check this box if Liquidated Damages are going to be waived	
5	Liquidated Damages Amount	Will be auto populated if 'Actual Completion date' is more than 'Expected completion date'	
6	Actual Completion Period	Enter the actual completion period in days	
7	Comments	Comment on Actual completion period, if required	

8	Actual Payment Date	Enter the date when payment is made. Date format is DD/MM/YYYY	13/08/2011
9	Comments	Comment on Actual Payment Date, if required	
8	Actual Payment Amount	Enter the actual amount paid	12000
10	Comments	Comment on Actual Payment Amount, if required	
5	Cheque/Draft Number	Enter the Cheque/ Draft number by which payment is made	40023467
6	TDS	Enter the TDS amount	

a. Click 'Save'

b. To enter details of another payment repeat steps a. to c.

47. In cases where Amendment is made click on 'Fill Amendment details, if required' link.
48. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	**Field Name**	**Field Description**	**Sample Data**
1	Is Amendment required?	Select yes to perform amendment. *Other fields (described below) will be shown once 'Yes' option is selected.*	Yes
2	Warranty	System will show the warranty period. Edit the warrant, if required.	
3	Performance Security Amount	System will show the performance security amount. Edit the amount, if required	
4	Expected Delivery Date	System will show the delivery date. Edit the date as per new delivery date.	
5	Performance Security Expiry Date	System will show the performance security expiry Date. Edit the date as per new expiry date	

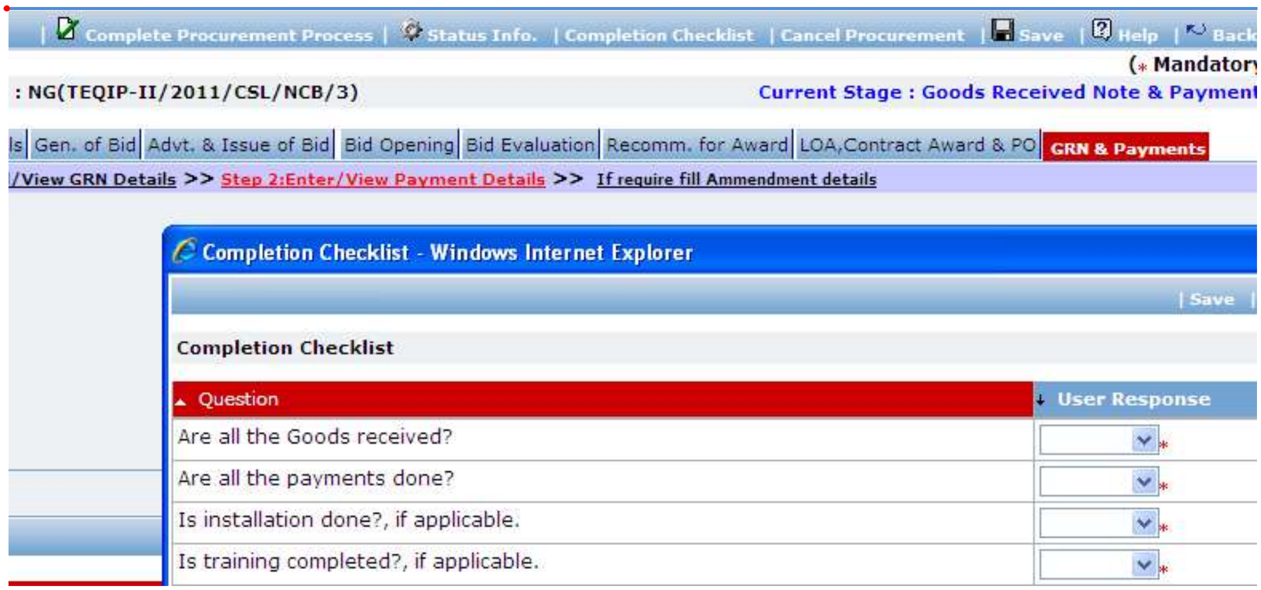
49. Click 'Save'
50. 'Payments' subtab is shown in the lower section. Click on the payment term name and update the details as per new terms.

Note: Only those payment terms are editable which do not have any actual completion date

51. Select 'Yes' in the 'Amendment Complete?' field.

52. Click 'Save'. This will complete the amendment process. After completing the amendment user can continue to track GRN and Payments.
53. Once all the details for all the payments are recorded, Procurement can be marked as complete.

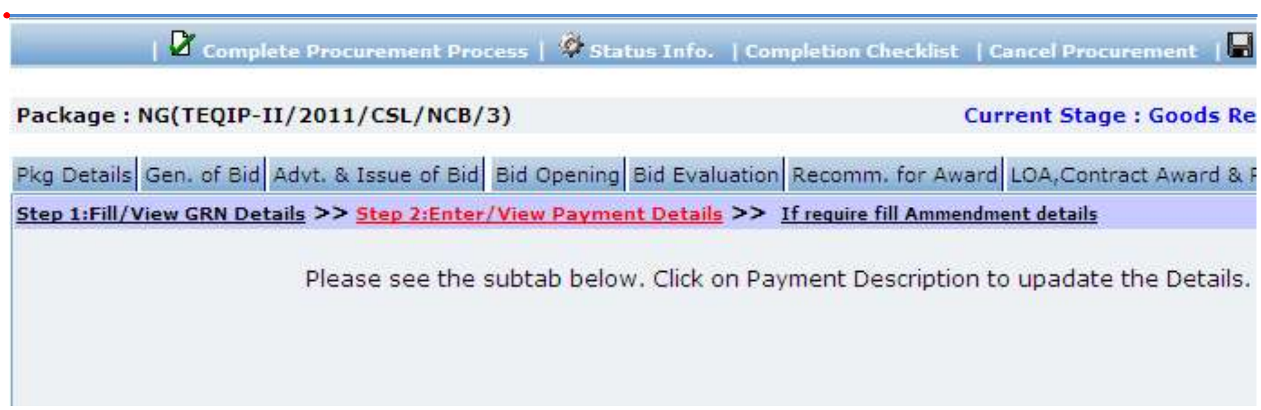
Click on 'Completion Checklist', checklist will be seen



a. Fill in the completion checklist

b. Click 'Save'

33. Click on 'Complete Procurement Process' this will complete the procurement for that Package.

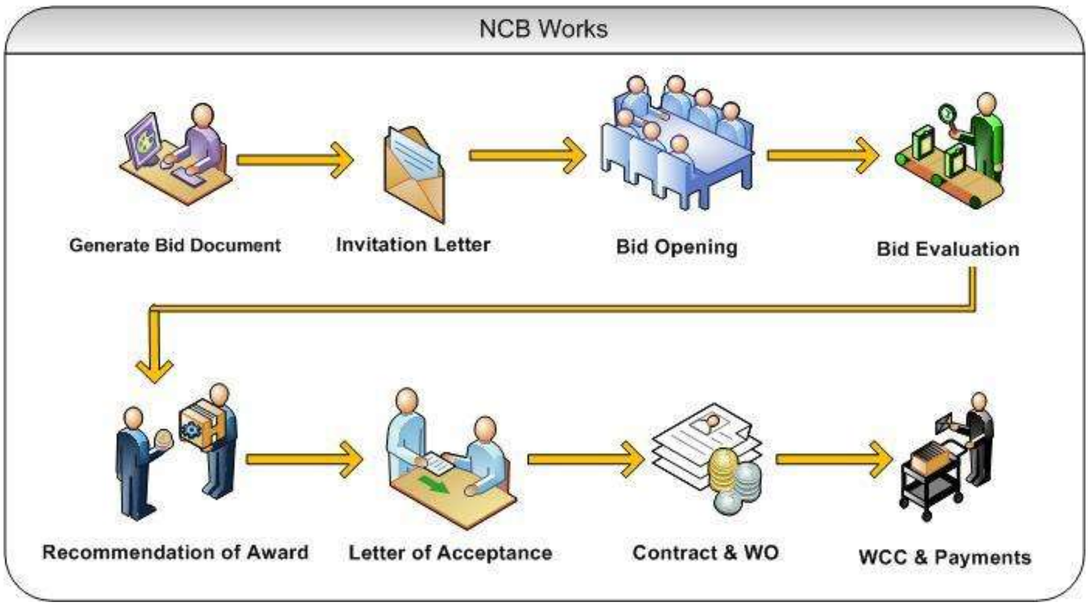


NCB Works

Purpose

To perform procurement of civil works using NCB method.

Process flow



Role(s)

- Procurement Coordinator (institution)
- Procurement Coordinator (SPFU) – Performs Prior review, when applicable.
- Procurement Coordinator – NPIU's procurement coordinator, Performs Prior review, when applicable.

Prerequisite

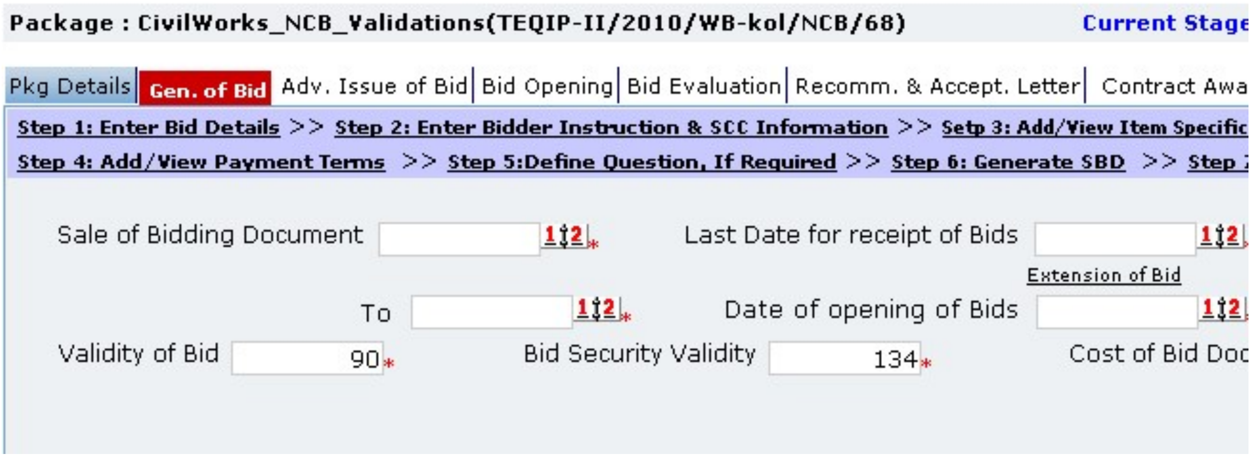
- Package to be procured should fall under category goods.
- Value of the package should be > USD 30,000.
  - For value range US$ 100,000 up to US$ 200,000, prior review is done by SPFU
  - For value range US$ 200,000 up to US$ 300,000, prior review is done by NPIU also.

Process Details

First stage of NCB is '**Gen. of Bid**'.

Gen of Bid

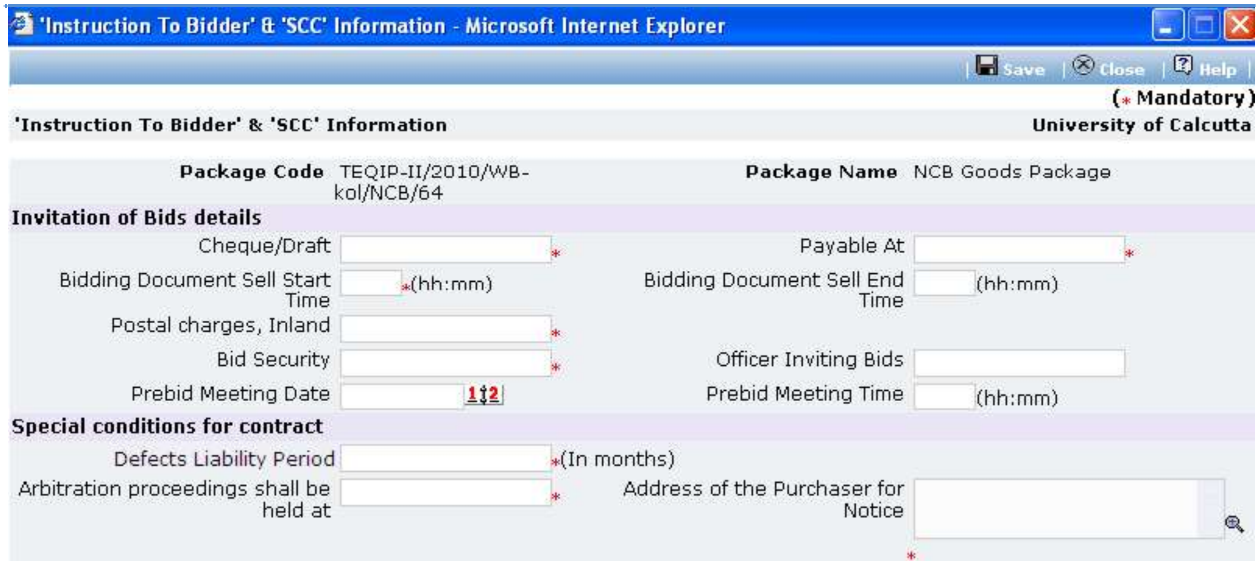
In this stage Standard Bidding Document is generated



1. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Start Date of Sale of SBD	Enter the date on which SBD sale will start. Date format is DD/MM/YYYY	15
2	Last Date for receipt of Bids	Will be auto populated as 30 days from start of sale date. Edit the date, if required. Date format is DD/MM/YYYY and time format is HH:MM, 24 hrs format.	12/03/2011 16:00
3	Last Date of Sale of SBD	Will be auto populated and will match the Last Date for receipt of Bids	
4	Date of opening of Bids	Will be auto populated and will match the Last Date for receipt of Bids	
5	Validity of Bid	Will be auto populated as 90 days	
6	Bid Security Validity	Will be auto populated as 134 days	
7	Cost of Bid Document	Enter the price of Bid document	

2. Click 'Save'
3. Click on 'Step 2: Enter Bidder Instruction & SCC Information' a pop up will be seen.



a. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Cheque/Draft in favour of	Mention the name that has to be put on the cheque/ draft for purchase of complete bidding document	CSL NIT
2	Payable At	Mention where draft should be payable	Delhi
3	Bidding Document Sell Start Time	Mention office hrs, start time when bid doc can be obtained. Time format is HH:MM, 24 hrs format	9:00
4	Bidding Document Sell End Time	Mention office hrs, end time till when bid doc can be obtained. Time format is HH:MM, 24 hrs format	18:00
5	Postal charges, Inland	Mention postal charges in Rs	230
6	Bid Security	Mention bid security amount in Rs. It should be within 2% to 5% of estimated cost of package	36000
7	Officer Inviting Bids	Mention the name of the officer	Mr. Mohan Lal
8	Prebid Meeting Date	If Prebid meeting is planned then enter the date. Date format is DD/MM/YYYY	12/08/2011
9	Prebid Meeting Time	Enter Prebid meeting time. Time format is HH:MM, 24 hrs format	12:00
10	Defects Liability Period	Enter the Defects Liability Period in days	120
11	Arbitration proceedings shall be held at	Mention the place	
12	Address of the Purchaser for Notice	Mention the address	

13	Liquidated Damages (Per Day)	Will be auto populated as 0.01%. Edit this field, if required. Value in this field will be used to calculated the Liquidated damages per day incase of any completion delays.	
14	Liquidated Damages (Maximum)	Will be auto populated as 10%. Edit this field, if required. Value in this field will be used to calculated the maximum amount of liquidated damages applicable	

b. Click 'Save'

4. Click on 'Step 3: View Item Details, if required' link **(This is an optional step, used to only view the item details).** 'Items' subtab is shown in the lower section

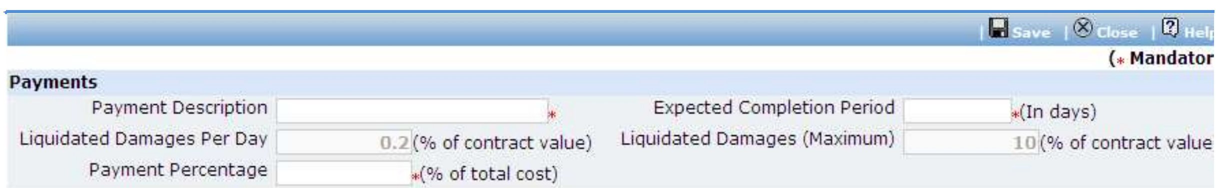
a. Click 'Item Name', a pop up will be seen

b. View the item details

c. If there is more than one item then, repeat steps a. and b.

5. Click on 'Step 4: Add/View Payment Terms' link. 'Payments' subtab is shown in the lower section.

a. Click 'Add', which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Payment Terms	Enter the payment title	3. On reaching plinth level (first level) 4. On Completion
2	Completion Period	Enter the period in days in which completion is expected once the contract is signed.	60
3	Payment Percentage	By default percentage will be show, edit the percentage if required	10

c. Click 'Save'.

d. To add another payment term repeat steps from a. to c.

6. Click on 'Step 5: Define Additional Question, If Required' link **(This is an optional step, to be performed only if additional evaluation/ post qualification question are required)**. 'Questions' subtab is shown in the lower section.

   a. Click 'Add', which is within the subtab. A pop up will be seen

   b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Question	Enter the description of the question to be asked during quotation evaluation. Form the question such that response (answer) is Yes/ No/ NA.	Does the supplier have a local service center?
2	Non Responsive Value	Select the value (Yes/ No/ NA) based on which the supplier will become non- responsive.	E.g. if the question is 'Does the Contractor have a local service center?' then the non- responsive value could be 'No'.

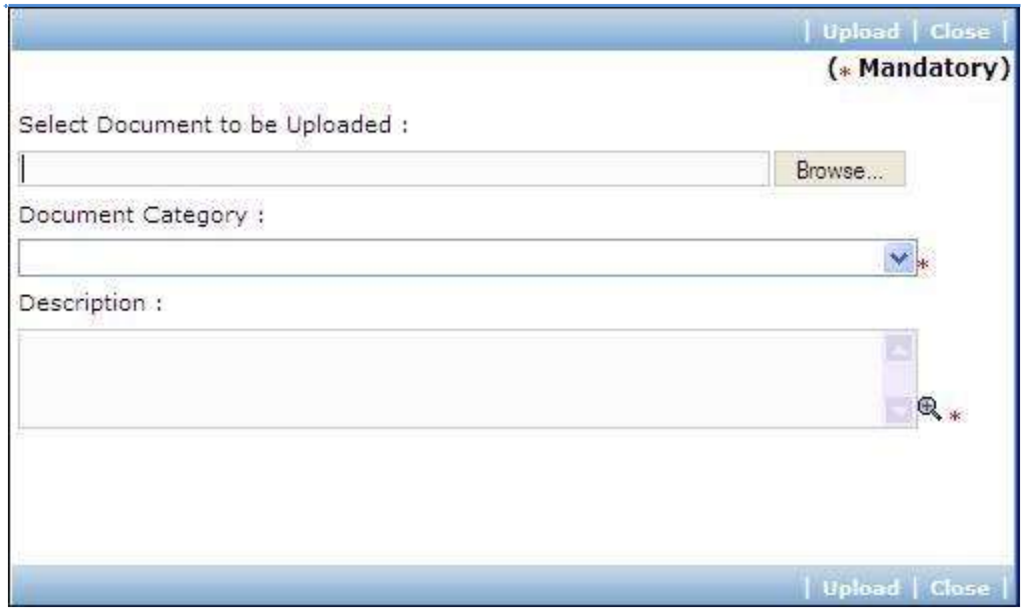
   c. Click 'Save'.

   d. To add another Question repeat steps from a. to c.

7. Click on 'Step 6: Generate SBD' link. System will give an option to Open/ Save the SBD. Save the SBD on your computer with a proper name. Update the sections highlighted in yellow and save the document.

8. Click on 'Step 7: Upload SBD Document' link. 'Documents' subtab will be seen in the lower section

   a. Click 'Add', which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Standard Bidding Document
3	Description	Enter more information about the uploaded document.	SBD

c. Click ‘Upload’ to upload the document in the system.

d. Uploaded document will appear on the list shown in ‘Documents’ section.

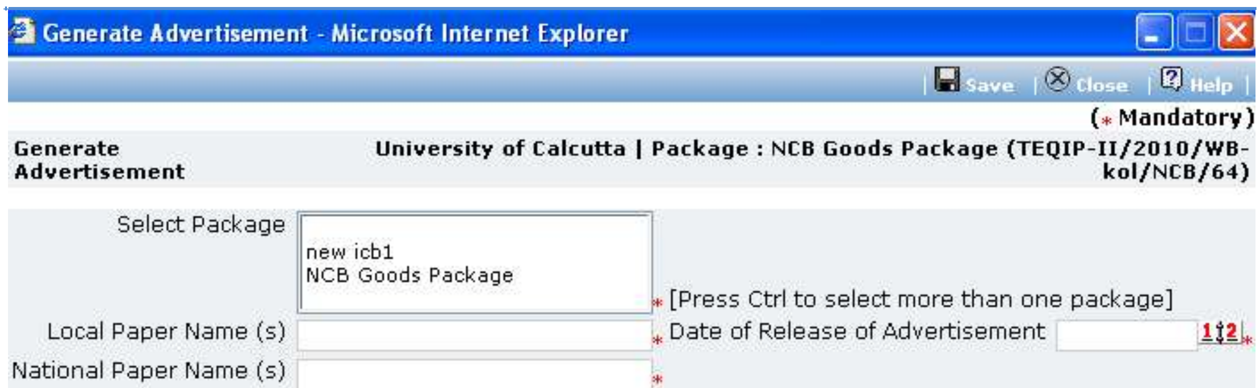
e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

9. On completion of ‘Gen of SBD’ stage click on ‘Move to Next Stage’. This will move the procurement to ‘**Advertisement & Issue of Bids**’ stage.

Advertisement & Issue of Bids

In this stage tender is floated and info of contractor purchasing SBD is captured, if available

10. Click on 'Step 1: Generate Advertisement'. A pop up will be seen

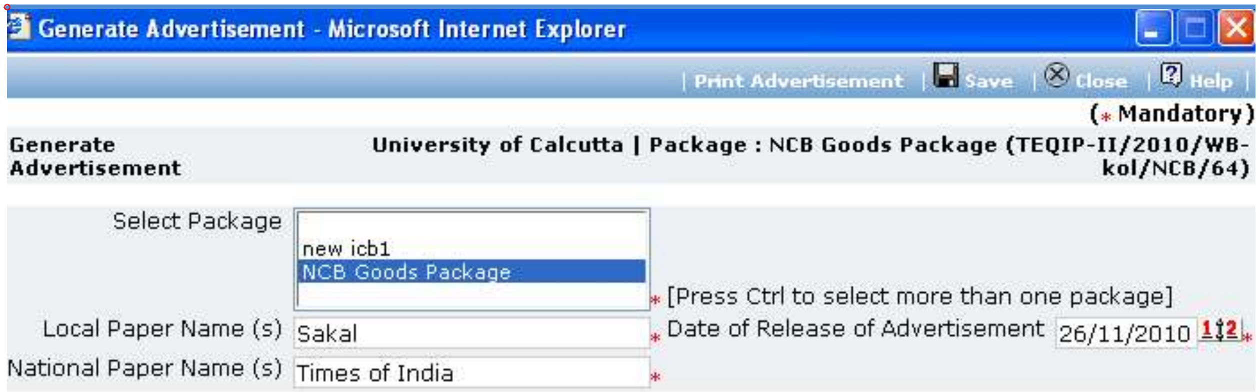


a. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Select Package	All the packages which are in Advt. Stage will be displayed. Press control button on the keyboard to select more than one package.	
2	Local Paper Name(s)	Enter the name of the local paper in which this advertisement will be printed	Lokamat
3	National Paper Name(s)	Enter the name of the national paper in which this advertisement will be printed	Times of India
4	Date of Release of Advertisement	Enter the date in format DD/MM/YYYY	12/09/2011

b. Click 'Save'

c. 'Print Advertisement' link will be seen, click on this link to generate the advertisement.

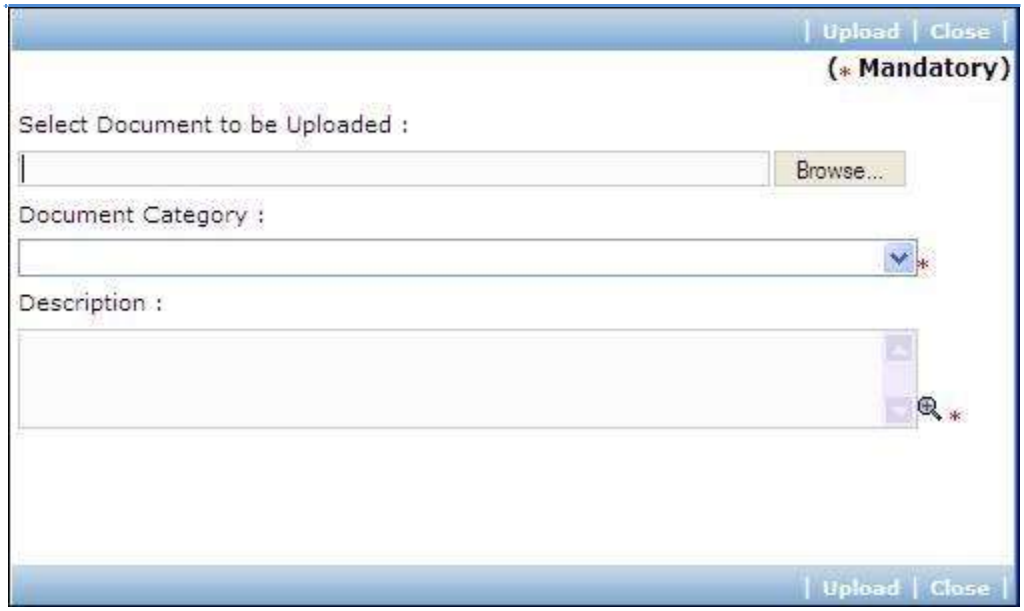


11. Click on ‘Step 2: Enter/View Advertisement Details’.

12. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Actual Publication Date (Local)	Enter the date when Advertisement was actually published in the Local paper. Date format is DD/MM/YYYY	16/09/2011
2	Actual Publication Date (National)	Enter the date when Advertisement was actually published in the N paper. Date format is DD/MM/YYYY	16/09/2011

13. Click ‘Save’
14. Click on ‘Step 3: Upload/View Advertisement’ link. ‘Documents’ subtab will be seen in the lower section
    a. Click ‘Add’, which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Copy of Advertisement
3	Description	Enter more information about the uploaded document.	

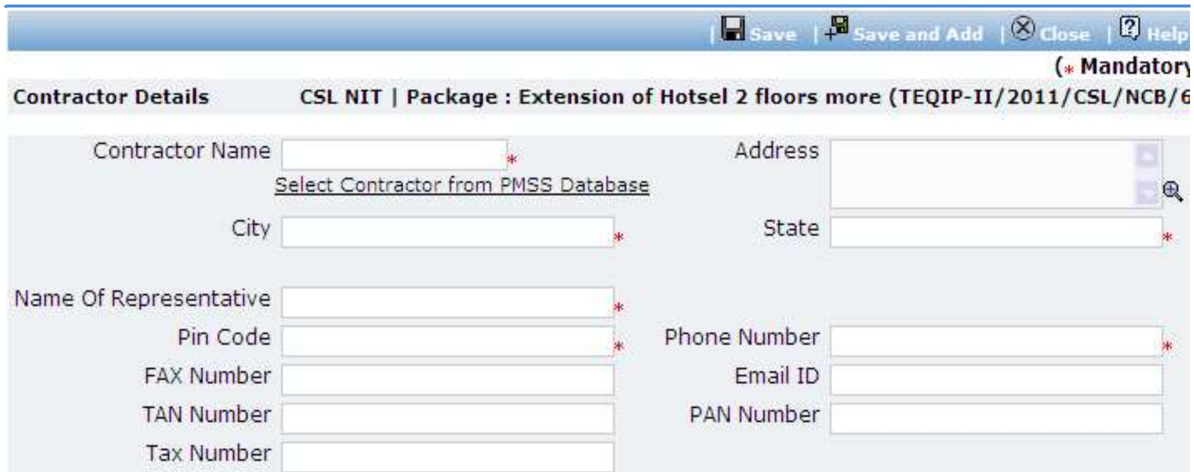
c. Click ‘Upload’ to upload the document in the system.

d. Uploaded document will appear on the list shown in ‘Documents’ section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

15. Click on ‘Step 4: Add/View Contractor Details’ link. ‘Contractor Details’ subtab will be seen in the lower section

a. Click ‘Add’, which is with the subtab a pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Contractor Name	Enter the Contractor name. Contractor can also be searched using 'Select Contractor from PMSS Database' link. Click on this link will display the existing list of Contractors, if any. Once the list is displayed click on the Contractor's name this will auto populated the selected Contractor's data. To search additional Contractors within the state or city use the filters provided on the page	FTTI Pvt Ltd
2	Address	Enter the address of the Contractor	STI Towers, Unit# 141/38, Campus 29. RMZ Millenia Business Park. 881, Dr. MGR Road
3	City	Enter the city of the Contractor	Pune
4	State	Enter the state of the Contractor	Maharashtra
5	Email ID	Enter the Email ID of the Contractor	ftti@efttil.com
6	Pin Code	Enter the Pin Code of the Contractor	411232
7	Name Of Representative	Enter the Representative of the Contractor	Mr. Mohan Solanki
8	Phone Number	Enter the Phone Number of the Contractor. To enter more than one number use comma (,) as a separator.	26422689
9	PAN Number	Enter the PAN Number of the Contractor	ANS44874
10	TAN Number	Enter the TAN Number of the Contractor	
11	Tax Number	Enter the TAX Number of the Contractor	

c. Click 'Save'

d. To add another Supplier repeat steps from a. to c.

16. Click on 'Step :5 Enter Prebid Meeting Information' link (This link will be shown only if Prebid Date and Prebid Time fields are added in 'Instruction to Bidder & SCC Information Popup'). A popup will be seen

a. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Actual Date of Prebid meeting	Enter the date when prebid was actually conducted. Date format is DD/MM/YYYY	22/09/2011
2	Pre-bid Meeting Clarification Issued Date	Enter the date when clarification was issued. Date format is DD/MM/YYYY	23/09/2011
3	Was there any Corrigendum and Addendum?	Select Yes/ No	Yes
4	Is Clarification issued to all Contractors	Select Yes/ No	Yes
5	Prebid MOM	Enter the MoM. Larger MoM can also be uploaded in the documents tab	

b. Click 'Save

17. Incase of extension to bid submission date, Click on 'Extension of Bid submission date (if required)' link. A popup will be seen.

c. Fill the fields on the page. Details of the fields are mentioned below;

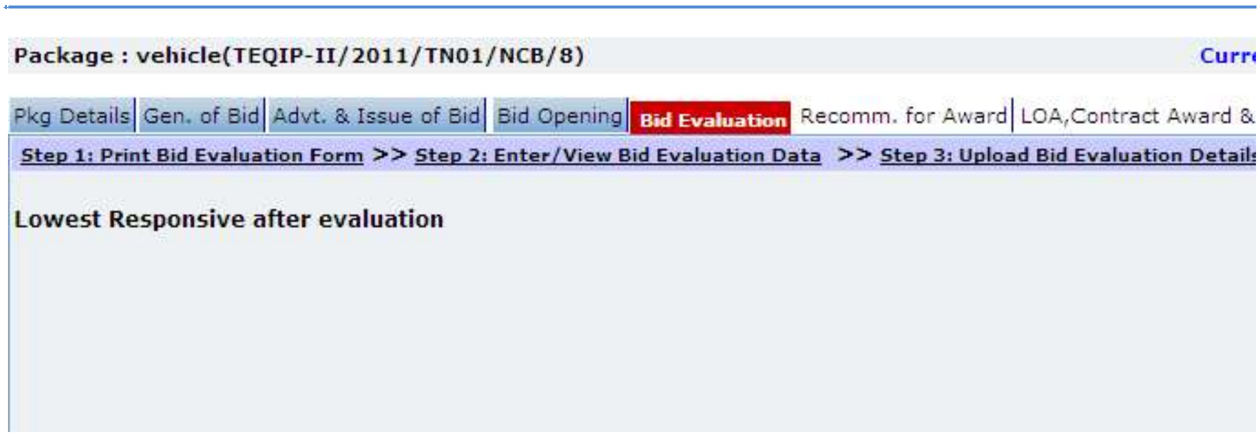
Sr. No.	Field Name	Field Description	Sample Data
1	Current Submission Date	System will show the current date	
2	Extended Date	Enter the new date. Date format is DD/MM/YYYY	22/09/2011
3	Reason for Extension	Enter the reason	

d. Click ‘Save’

18. Incase of Corrigendum, Click on ‘Upload Corrigendum (If any)’ link and upload the documents
19. On completion of ‘Advertisement & Issue of Bids’ stage Click on ‘Move to Next Stage’. This will move the procurement to ‘**Bid Opening’** stage.

Bid Opening

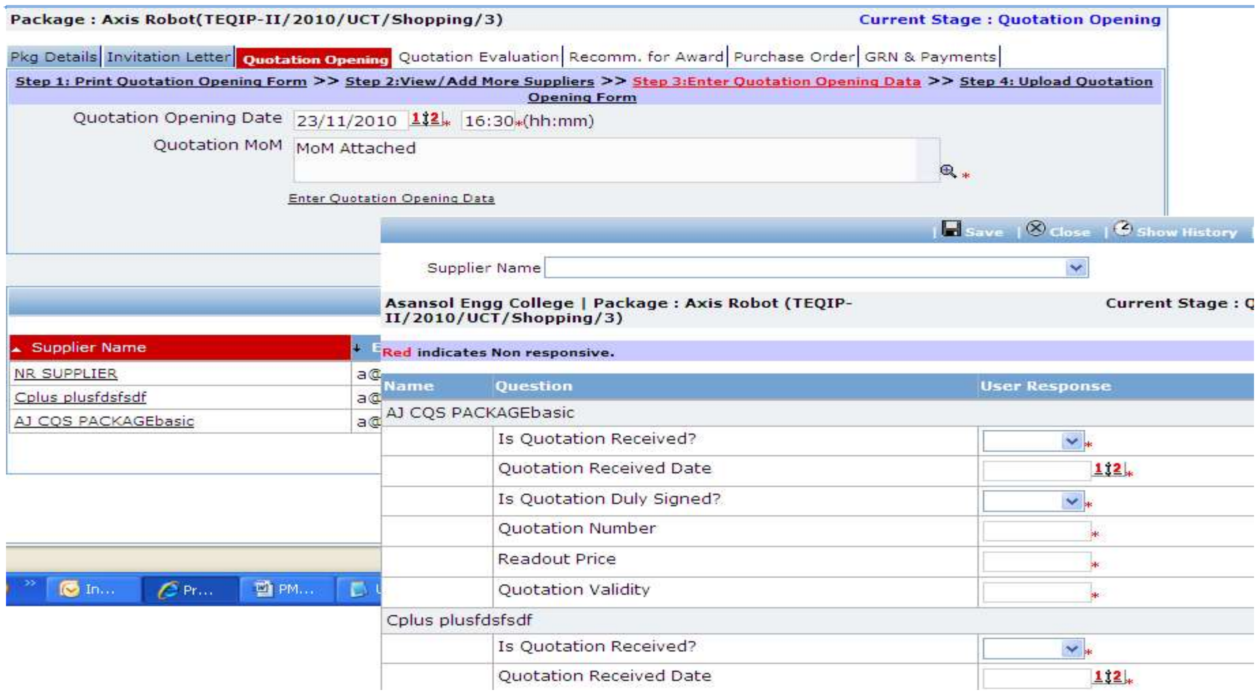
In this stage Bid opening is performed and responsive bids are identified.



20. On the ‘Bid Opening’ tab click on ‘Step 1: Add/View Contractor Details’ link. Repeat point 15, if required.
21. Click on ‘Step 2: Print Bid Opening Form’. This will open a Bid opening form. This form can be used during Bid Opening. Print of this form can be taken and Bid opening details can be recorded on this form. The Contractor names (which were added) are seen on this form against which Bid opening details can be mentioned. Three extra columns are provided to accommodate names of any new Contractors who have submitted their Bids directly.
22. Click on ‘Step 3: Enter/ View Bid Opening Data’ and Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Bid Opening Date	Enter the actual date and time when Bid was opened. Date format is DD/MM/YYYY and time format is HH:MM, 24 hrs format. It is recommended that opening should be done at the start of the week so that there is ample time to enter opening data in PMSS.	12/03/2011 16:00
2	Bid MoM	Enter the Minutes of Meeting. Larger MoM’s can be uploaded using the documents subtab	

23. Click ‘Save’
24. Click on the ‘Enter Bid Opening Data’ link. A pop up will be seen



a. Enter the Responsiveness Criteria.
b. Click ‘Save’.

25. Click on ‘Step 4: Upload Bid Opening Document & MOM’ link. ‘Documents’ subtab will be shown in the lower section.
   a. Click ‘Add’, which is within the subtab. A pop up will be seen

b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Bid Opening Form
3	Description	Enter more information about the uploaded document.	Signed Bid Opening Form

c. Click 'Upload' to upload the document in the system.

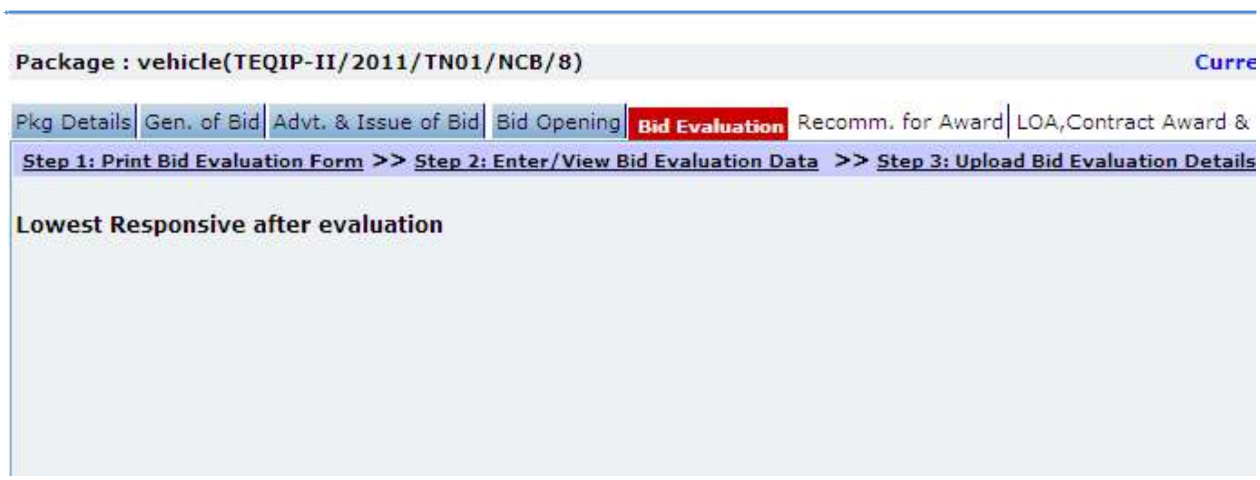
d. Uploaded document will appear on the list shown in 'Documents' section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

26. On completion of 'Bid Opening' stage click on 'Move to Next Stage'. This will move the procurement to '**Bid Evaluation**' stage.

Bid Evaluation

In this stage evaluation is performed and lowest evaluated Contractor is identified.



27. On the 'Bid Evaluation' tab click on 'Step 1: Print Quotation Evaluation Form'. This will open a bid evaluation form. This form can be used during Bid Evaluation. Print of this form can be taken and Bid Evaluation details can be recorded on this form.

28. Click on the 'Step 2: Enter/ View Bid Evaluation Data' link. A pop up will be seen

    a. Enter the comparative data for all the Contractors.

    b. Click 'Save'.

c. Click on 'Quotation Details' link, which is in front of each responsive supplier. A popup will be seen.

d. Fill the fields on the page. Details of the fields are mentioned below;

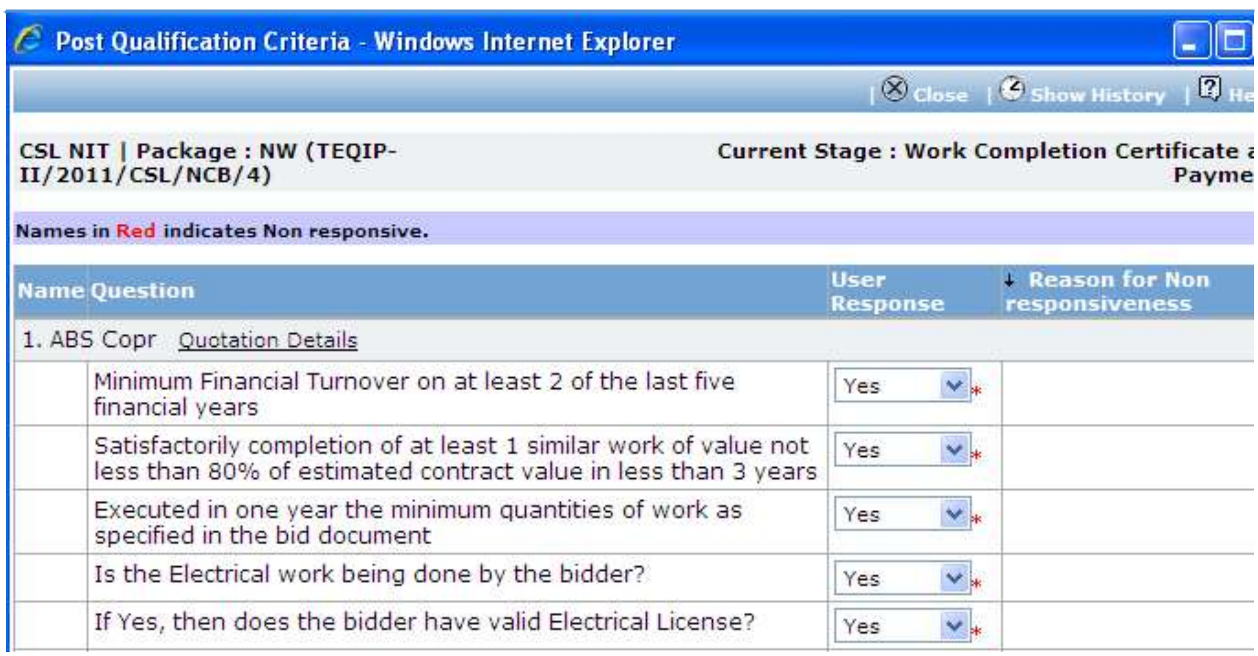
Sr. No.	Field Name	Field Description	Sample Data
1	Basic Cost per unit	Basic cost for each item can be entered in this field. Enter the basic cost per item as given by the supplier	2000
2	Comments	Enter comments, if any	

e. Click on 'Save'

f. Quotation details of all responsive Contractors can be entered by repeating steps from c. to e.

29. System will show the lowest evaluated responsive Contractor (L1) on the main page.

30. Click on 'Perform Post Qualification' link, which is in front of the Contractor name. A pop up will be seen



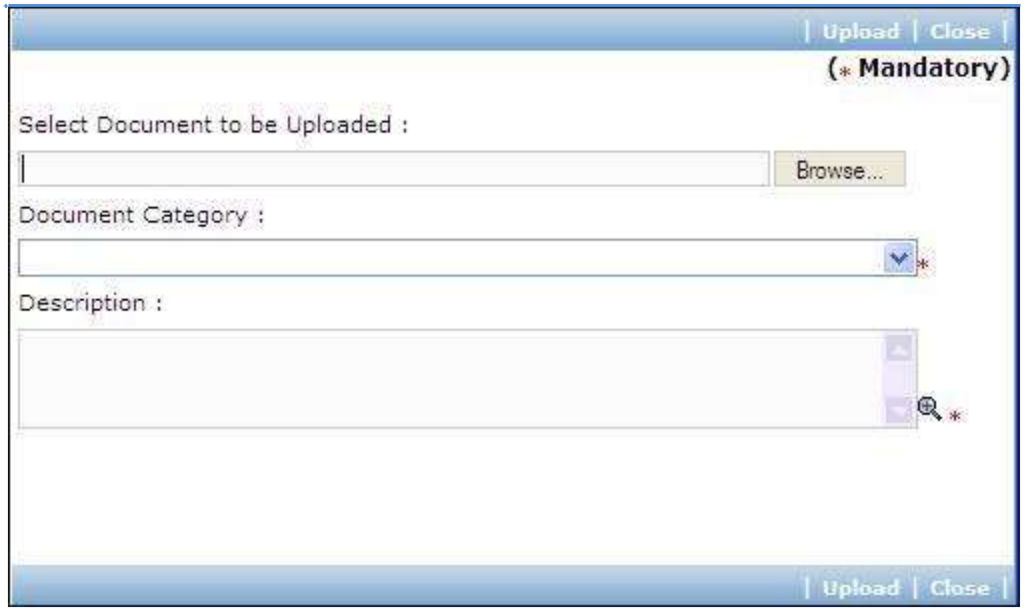
a. Enter the post qualification details

b. If the Contractor becomes non-responsive in this step then automatically next lowest evaluated Contractor will be seen.

c. Repeat the Post Qualification process for this Contractor.

31. Click on 'Step 3: Upload Bid Evaluation Details' link. 'Documents' subtab will be shown in the lower section.

a. Click 'Add', which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Bid Evaluation Form
3	Description	Enter more information about the uploaded document.	Signed Bid Evaluation Form uploaded

c. Click 'Upload' to upload the document in the system.

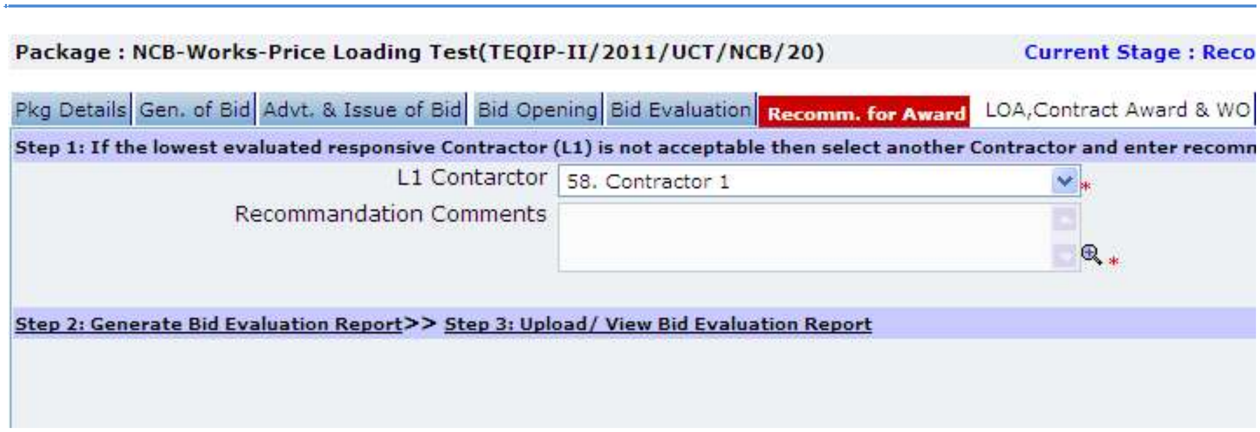
d. Uploaded document will appear on the list shown in 'Documents' section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

32. On completion of 'Bid Opening' stage click on 'Move to Next Stage'. This will move the procurement to '**Recommendation for Award**' stage.

Recommendation for Award

In this stage appropriate responsive Contractor can be recommend. If the lowest evaluated responsive Contractor (L1) is not acceptable by the committee then another Contractor can be selected in this stage



33. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	L1 Contractor	If the lowest evaluated responsive Contractor (L1) is not acceptable by the committee then another contractor can be selected	
2	Recommendation Comments	Enter the comments	

34. Click on 'Step 2: Generate Bid evaluation Report' link. System will give an option to Open/ Save the Bid evaluation Report. Save the report on your computer with a proper name. Update the sections highlighted in yellow and save the document.
35. Click on 'Step 3: Upload Bid Evaluation Report' link. 'Documents' subtab will be shown in the lower section.
    a. Click 'Add', which is within the subtab. A pop up will be seen

b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Bid Evaluation Report
3	Description	Enter more information about the uploaded document.	Signed Bid Evaluation report uploaded

c. Click ‘Upload’ to upload the document in the system.

d. Uploaded document will appear on the list shown in ‘Documents’ section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

Note: If the Contract price (i.e. Evaluated Price) is more than 25% of the estimated price then the package will be sent for prior review. Once the user clicks on ‘Move to Next Stage’ system will ask for a confirmation before sending the package for prior review.

36. On completion of ‘Recommendation for Award’ stage Click on ‘Move to Next Stage’. This will move the procurement to ‘**LOA, Contract Award & WO**’ stage.

LOA, Contract Award & WO

In this stage LOA, Contract Award and WO are generated and Payment terms are updated.

37. Fill the fields on the page. Details of the fields are mentioned below;

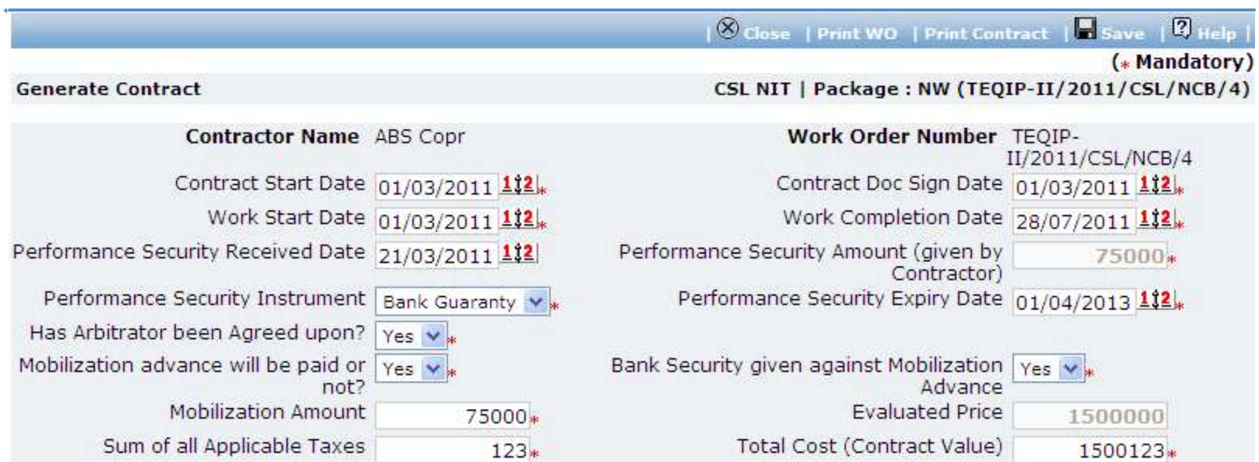
Sr. No.	Field Name	Field Description	Sample Data

1	Performance Security Amount	Will be auto calculated as 5% of contract value	
2	LOA Generated Date	System will show the current date (i.e. today's date) by default. Click on 'Save'	Today's Date

38. Click 'Save'

Note: If Generated date is greater than the bid validity (i.e. difference between Bid opening date and Generated date is more than the bid validity given by the selected supplier) system will ask to provide a new bid validity. Enter the total new bid validity. E.g. if original validity was 90 days and contractor has extended it by 30 days then enter 120 days.

39. Click on 'Step 2: Generate Letter of Acceptance' link. System will give an option to Open/ Save the LOA. Save the LOA on your computer with a proper name. Update the sections highlighted in yellow and save the document.
40. Click on 'Step 3: Generate Contract & WO'. A Pop up will be seen



a. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Contract Start Date	Enter the date when contract is expected to start. Date format is DD/MM/YYYY	01/06/2011
2	Contract Document signed - date	Enter the contract signed date. Date format is DD/MM/YYYY	20/05/2011
3	Work Start Date	Enter the date when work is expected to start. Date format is DD/MM/YYYY	01/06/2011
4	Work Completion Date	Enter the date when work is expected to complete. Date format is DD/MM/YYYY	23/05/2012

5	Performance Security Received Date	Enter the date when Performance Security was received from the bidder. Date format is DD/MM/YYYY	12/05/2011
6	Performance Security Amount	Will be auto calculated as 5% of the estimated cost. Edit the amount, if required.	36000
7	Performance Security Instrument	Select the Performance Security Instrument	DD
8	Performance Security Expiry Date	Enter the date when Performance Security will expiry. This date should be more than Expected Delivery Date + Warranty + 28 days	29/06/2013
9	Has Arbitrator been Agreed upon?	Select Yes/ No. Whether arbitrator is agreed or otherwise.	Yes
1	Mobilization advance will be paid or not?	Select Yes/ No. Whether Mobilization advance will be paid or otherwise.	Yes
10	Bank Security given against Mobilization Advance?	Select Yes/ No. Whether Bank Security given against Mobilization Advance	Yes
12	Total Base Cost (Item)	Will be auto calculated as (Qty*Basic Cost Per Unit)	System calculated
13	Mobilization Amount	Enter the mobilization amount. Enter 0 if no mobilization amount is taken	12000
14	Evaluated Price	Will be auto populated	System calculated
15	Sum of all Applicable Taxes	Enter the total amount of all the taxes	2300
16	Total Cost (Contract Value)	Will be auto populated as (Total Base Cost (Item) + Sum of all Applicable Taxes)	System calculated

b. Click ‘Save’

c. Click ‘Print WO’. System will give an option to Open/ Save the WO. Save the WO on your computer with a proper name. Update the sections highlighted in yellow and save the document.

d. Click ‘Print Contract’. System will give an option to Open/ Save the Contract. Save the Contract on your computer with a proper name. Update the sections highlighted in yellow and save the document.

41. Click on ‘Step 2: View/Update Payments details’ link. ‘Payments’ subtab will be seen in the lower section.

    a. Click on the payment term name a pop up will be seen

    b. Fill the fields on the page. Details of the fields are mentioned below;

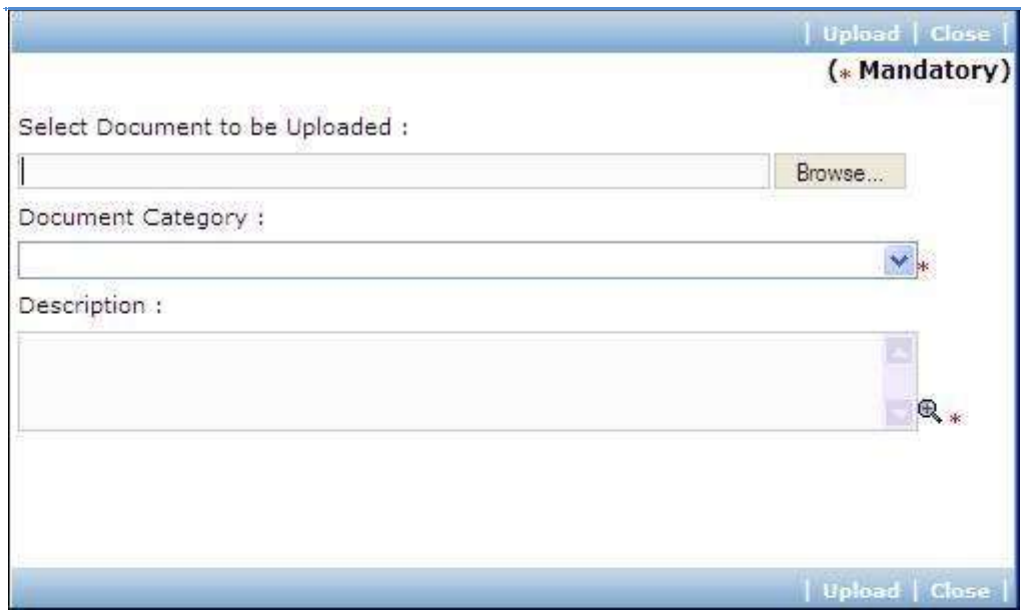
Sr. No.	Field Name	Field Description	Sample Data
1	Expected Completion Date	This is auto calculated as Contract Start Date + Expected Completion Period. Edit the date if required.	30
2	Expected Payment Date	Enter the expected date when payment will be made against this completion. Date format is DD/MM/YYYY	12/08/2011

c. Click 'Save'.

d. Update the other payment terms by repeating steps a.to c.

42. Click on 'Step 5: Upload WO , LOA & Contract Form' link. 'Documents' subtab will be shown in the lower section.

a. Click 'Add', which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	Letter of Acceptance
3	Description	Enter more information about the uploaded document.	Signed LOA uploaded

c. Click 'Upload' to upload the document in the system.

d. Uploaded document will appear on the list shown in 'Documents' section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

f. To upload WO repeat Steps a. to c. (Select document category as ‘Work Order’)

g. To upload Contract repeat Steps a. to c. (Select document category as ‘Contract Form’)

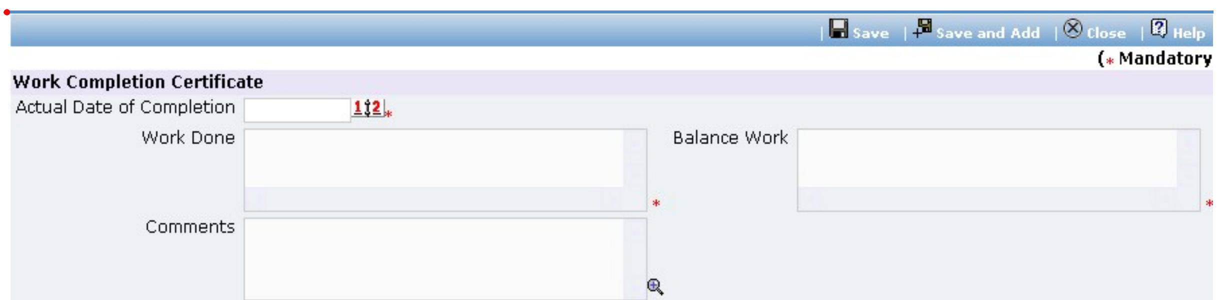
43. On completion of ‘Work Order’ stage Click on ‘Move to Next Stage’. This will move the procurement to ‘**WCC & Payments**’ stage.

WCC & Payments

In this stage Work completion details are captured and Payment tracking is performed.

44. Click On ‘Step 1: Add/View Work Completion’ link. ‘Work Completion’ subtab will be seen

a. Click on ‘Add’, a pop up will be seen

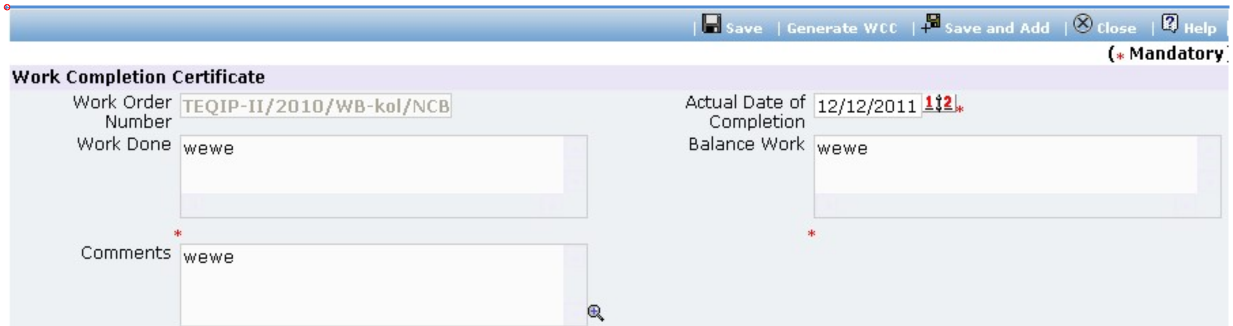


b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Actual Date of Completion	Enter the completion date. Date format is DD/MM/YYYY	22/18/2011
2	Work Done	Mention the work completion details	
3	Balance Work	Mention the details of the remaining work	
4	Comments	Enter comments, if any	

c. Click ‘Save’

d. Click on ‘ Generate WCC’ , which is on the upper bar of the main (WCC) section. WCC Report will be generated.



e. To add another record for WCC repeat steps from a. to d.

45. Click on ‘Step 2: Enter/View Payment Details’. ‘Payments’ subtab will be seen in the lower section

a. Click on the Payment Term a popup will be seen

b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	WCC Generated?	Check this box if Work completion certificate is generated	
2	Work Completed?	Check this box if work is completed	
3	Actual Completion Date	Enter the actual date of completion. Date format is DD/ MM/ YYYY	12/10/2011
4	Liquidated Damages Waived?	Check this box if Liquidated Damages are going to be waived	
5	Liquidated Damages	Will be auto populated if ‘Actual Completion date’ is more than ‘Expected completion date’	
6	Actual Completion Period	Enter the actual completion period in days	
7	Comments	Comment on Actual completion period, if required	
8	Actual Payment Date	Enter the date when payment is made. Date format is DD/MM/YYYY	13/08/2011
9	Comments	Comment on Actual Payment Date, if required	
10	Actual Payment Amount	Enter the actual amount paid. Ideally, this amount + the Retention Money amount should match the Expected Payment amount	12000
11	Comments	Comment on Actual Payment Amount, if required	
12	Retention Money	Will be auto calculated as 5% of Expected payment amount	2300
13	Deduction For Mobilization	Enter the deduction for mobilization amount if any	2000

14	Cheque/Draft Number	Enter the Cheque/ Draft number by which payment is made	40023467
15	TDS	Enter the TDS amount	
16	Quality Check Carried Out	Select Yes if Quality check is carried Out	Yes

c. Click 'Save'

d. To enter details of another payment repeat steps a. to c.

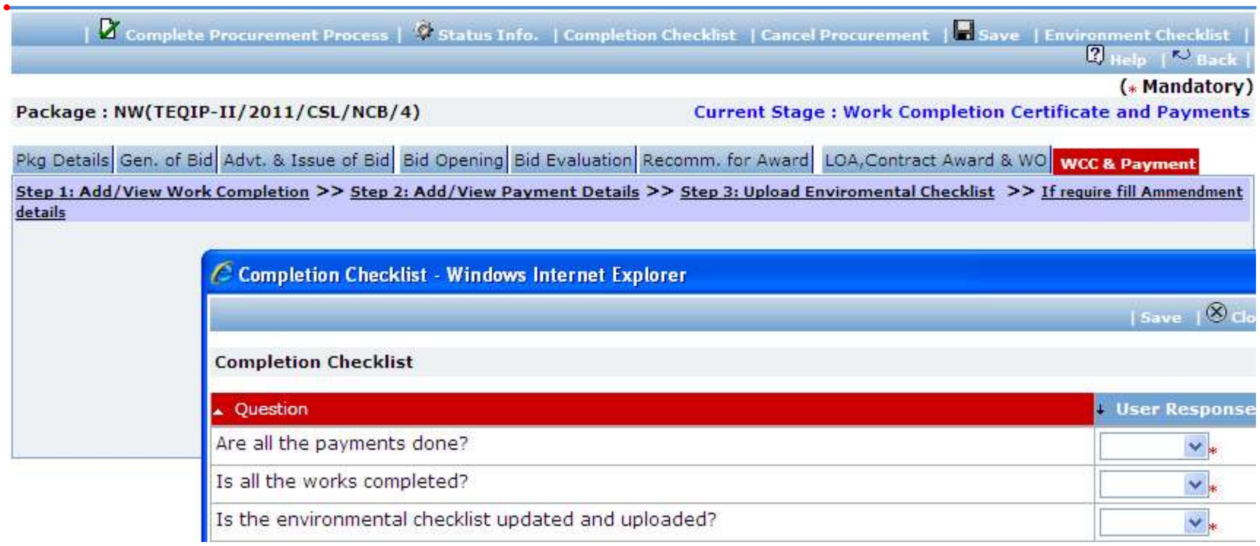
46. In cases where Amendment is made click on 'Fill Amendment details, if required' link.
47. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Is Amendment required?	Select yes to perform amendment. *Other fields (described below) will be shown once 'Yes' option is selected.*	Yes
2	Defects Liability Period	System will show the Defects Liability period. Edit the period, if required.	
4	Work Completion Date	System will show the completion date. Edit the date as per new completion date.	
3	Performance Security Amount	System will show the performance security amount. Edit the amount, if required	
5	Performance Security Expiry Date	System will show the performance security expiry Date. Edit the date as per new expiry date	

48. Click 'Save'
49. 'Payments' subtab is shown in the lower section. Click on the payment term name and update the details as per new terms.

Note: Only those payment terms are editable which do not have any actual completion date

50. Select 'Yes' in the 'Amendment Complete?' field.
51. Click 'Save'. This will complete the amendment process. After completing the amendment user can continue to track WCC and Payments.
52. Once all the details for all the payments are recorded this Procurement can be marked as complete. Click on 'Completion Checklist', checklist will be seen



a. Fill in the completion checklist

b. Click 'Save'

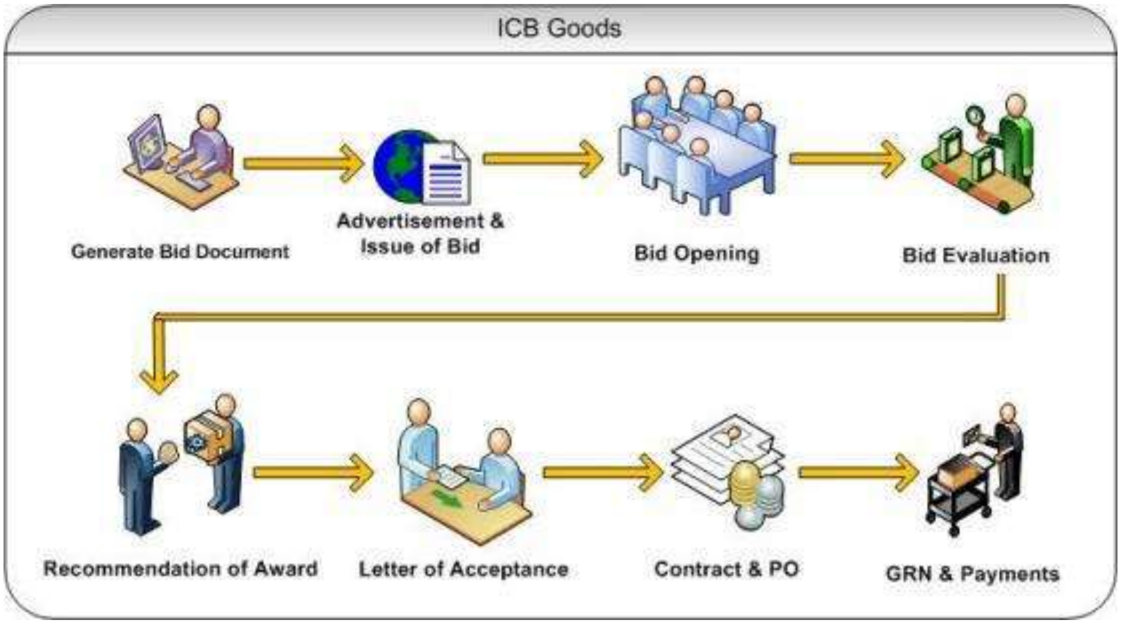
39. Click on 'Complete Procurement Process' this will complete the procurement for that Package.

ICB

Purpose

To perform procurement of goods using ICB method.

Process flow



Role(s)

- Procurement Coordinator (institution)

Prerequisite

- Package to be procured should fall under category goods.
- Value of the package should be >USD 300,000

Process Details

Steps for ICB are same as NCB except;

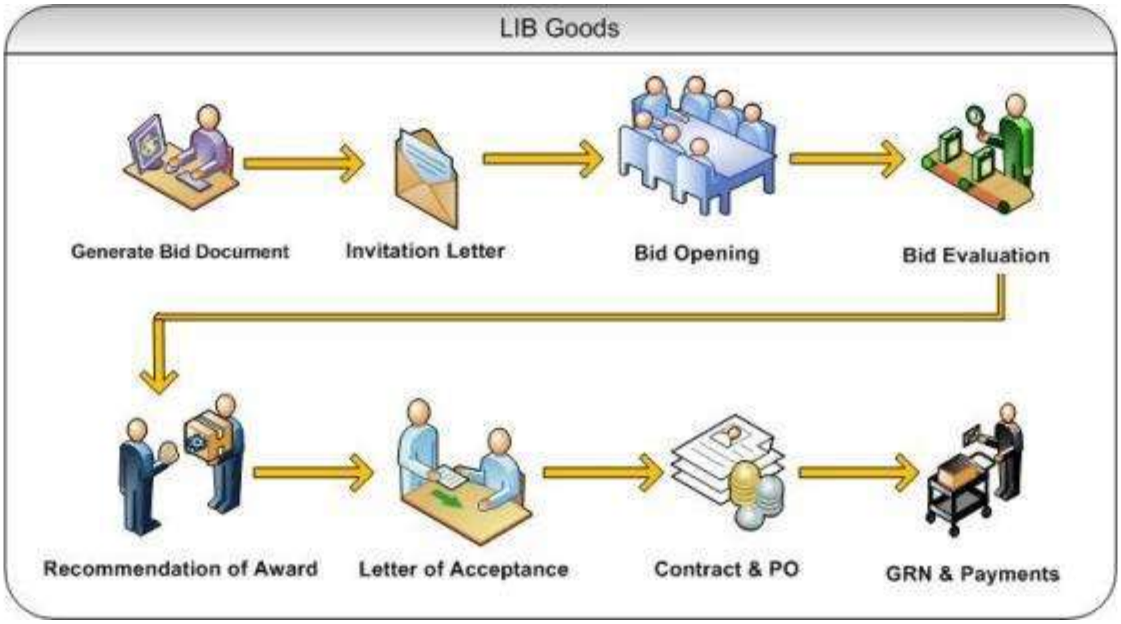
- At the advertisement stage 'International site details' and 'UNDB' published data can be inputted.
- At every stage World Bank prior review is required thus after every stage package will go for World Bank review.

LIB

Purpose

To perform procurement of goods using ICB method.

Process flow



Role(s)

- Procurement Coordinator (institution)

Prerequisite

- Package to be procured should fall under category goods.
- Value of the package should be >USD 300,000

Process Details

Steps for LIB are same as ICB except;

- Advertisement is not done in LIB, it is done by direct invitation.

Chapter

6

SERVICES METHOD

Procurement Using QCBS/FBS/LCS/CQS/SSS/

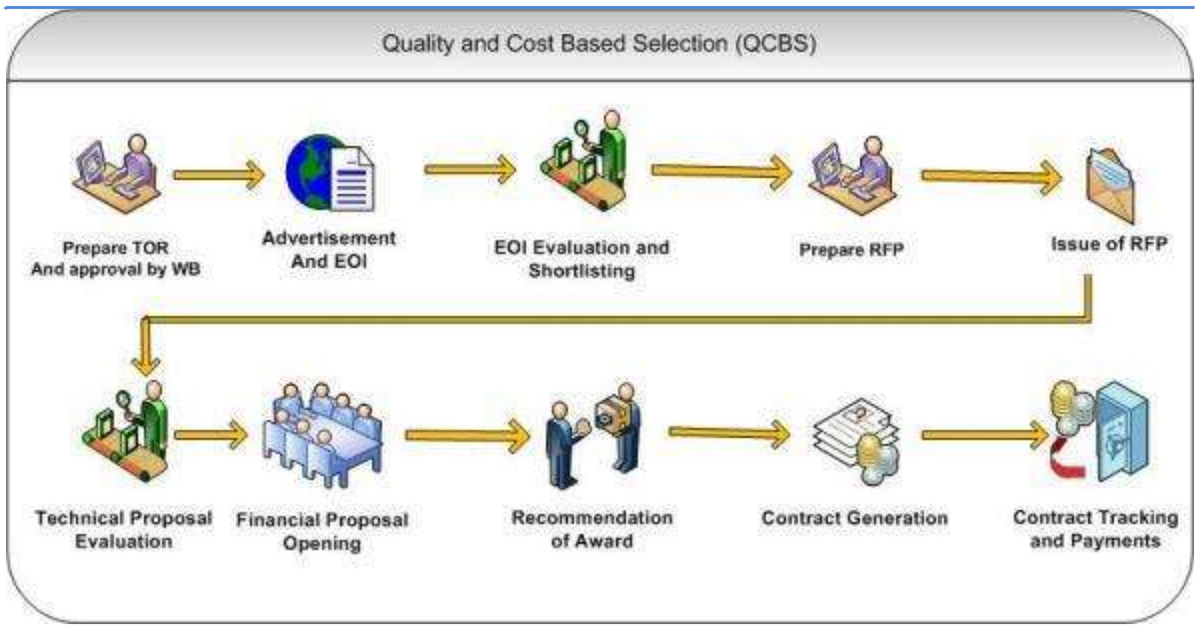
Individual Consultant – Competitive/Individual Consultant - SSS

Quality and Cost Based Selection (QCBS)

Purpose

QCBS is most generally used method for selecting service providers. QCBS method can be used for selecting providers for Research contracts, professional services, training, workshops and fellowships.

Process flow



Role(s)

- Procurement Coordinator (institution) – initiates and carries out the process of selection of providers.
- Procurement Coordinator (SPFU) – reviews the procurement if submitted to him for prior review.
- Procurement Coordinator (NPIU) – reviews the procurement if submitted to him for prior review.

Prerequisite

- Financial Sanction should be obtained for procurement of the service.

- TOR (Terms of References) should be prepared and reviewed by reviewing authorities at Institution, SPFU and NPIU.
- TOR should be reviewed and approved by World Bank Officials.
- Technical Review Committee should be formed for this procurement. This committee will review and evaluate technical proposals received by the consultants based on the evaluation criteria given in the RFP document.

Prior Review Scenarios

- For State-sponsored institutions
    - If estimated cost is <10,000 US$ and shortlisted consultants at EOI Shortlisting stage are not equal to 6, then the procurement will be sent to respective SPFU procurement coordinator for prior review.
    - If estimated cost is between 10,000 US$ and 1,00,000 US$, then the procurement will be sent to respective SPFU procurement coordinator for prior review.
    - If estimated cost is between 1,00,000 US$ and 2,00,000 US$, then the procurement will be sent to SPFU procurement coordinator. When he gives NOC, it will be sent to to NPIU procurement coordinator for prior review.
    - If estimated cost is 2,00,000 US$ and above, then the procurement will be submitted to SPFU procurement coordinator. When he gives NOC, it will be sent to NPIU procurement Coordinator to obtain World Bank NOC.
- For Centrally Funded Institutions,
    - If estimated cost is <10,000 US$ and shortlisted consultants at EOI Shortlisting stage are not equal to 6, then the procurement will be sent to respective SPFU procurement coordinator for prior review.
    - If estimated cost is between 10,000 US$ and 2,00,000 US$, then the procurement will be sent to NPIU procurement coordinator for prior review.
    - If estimated cost is 2,00,000 US$ and above, then the procurement will be submitted to NPIU procurement Coordinator to obtain World Bank NOC.

Process Details

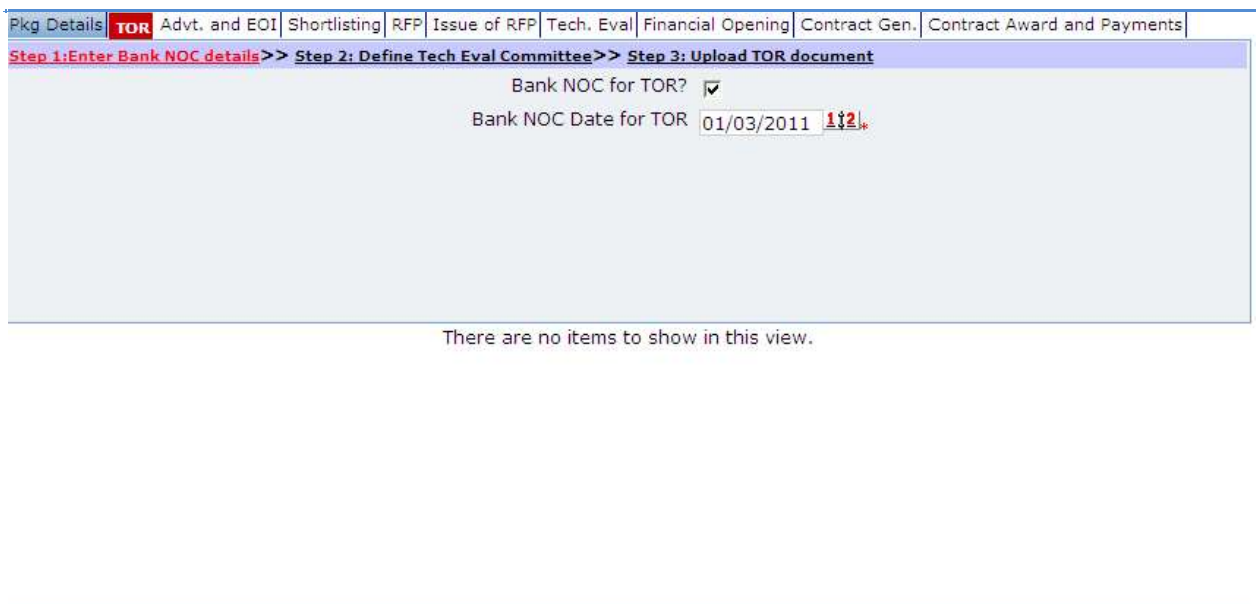
The following section explains procurement of services using QCBS method step-by-step.

The first stage is "Generation of TOR"

Generation of TOR

In this stage activities related to TOR approval are performed. Technical Evaluation Committee will be defined in this stage. This committee will be involved in evaluation of technical proposals submitted by the consultants.

'TOR' tab will be selected by default.

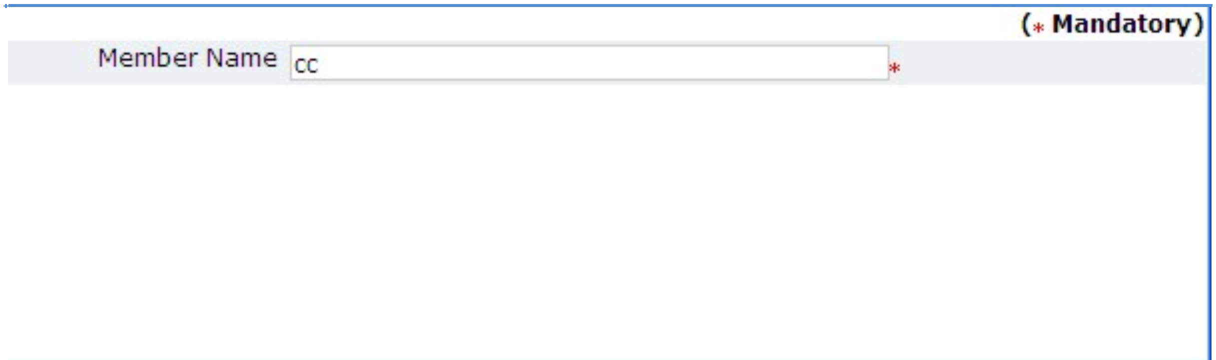


1. Fill following details on the page related to World Bank NOC for TOR.

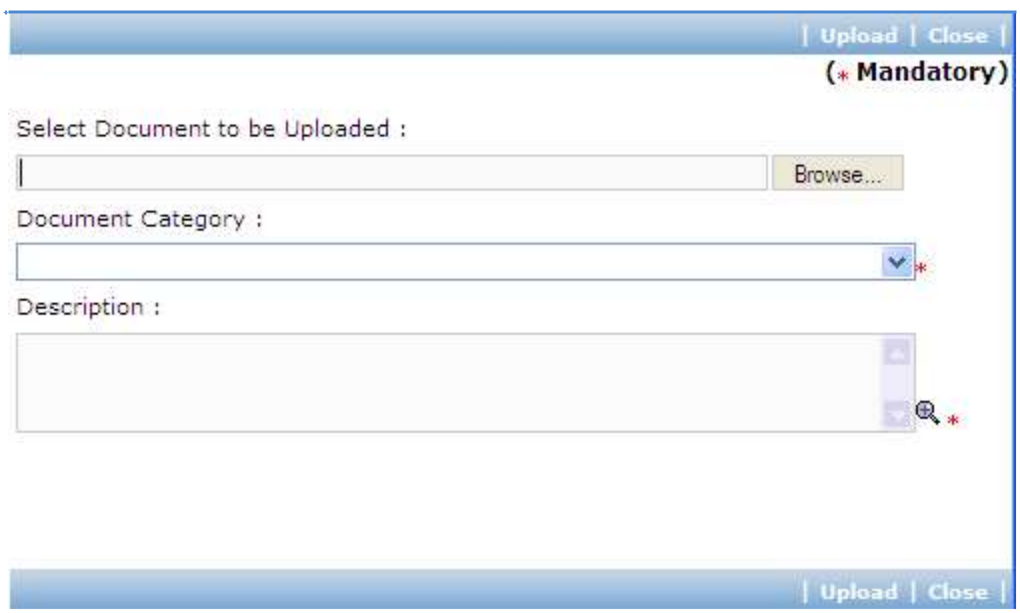
Sr. No.	Field Name	Field Description	Sample Data
1	Bank NOC for TOR	Enter the checkbox if World Bank NOC has been obtained for the TOR This field is not mandatory.	
2	Bank NOC Date for TOR	Enter date in DD/MM/YYYY format or select date using calendar. You cannot enter past Date. Please enter date on which World Bank has given its NOC for the TOR.	

2. Click 'Save'.

3. Click "Step 2: Define Tech Evaluation Committee" link. 'Technical Evaluation Committee' subtab is shown in the lower section.
4. Define Technical Evaluation Committee members.
    a. To add a Technical Evaluation Committee member, click on the 'Add' link, which is within the subtab. A popup will be seen



    b. It has only one field – Member Name. Fill the name of member in the field.
    c. Click 'Save'
    d. To add another member, repeat steps a to c.
5. Click "Step 3: Upload TOR Document" link. 'Documents' subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.
6. Upload finalized and approved TOR Document.
    a. Click 'Add' link, which is within the subtab. A popup will be seen



    b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR
3	Description	Enter more information about the uploaded document.	This is approved TOR.

c. Click 'Upload' to upload the document in the system.

7. After the document is uploaded, it will appear on the list shown in 'Documents' section.
8. You can select and delete any document that has been uploaded in current stage of the procurement. For e.g. if you are in 'TOR Generation' stage, you can delete documents that you have uploaded in this stage. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.
9. On completion of 'Generation of TOR' stage click on 'Move to Next Stage'. This will move the procurement to '**Adv & Issue of EOI**' stage.

Adv & Issue of EOI

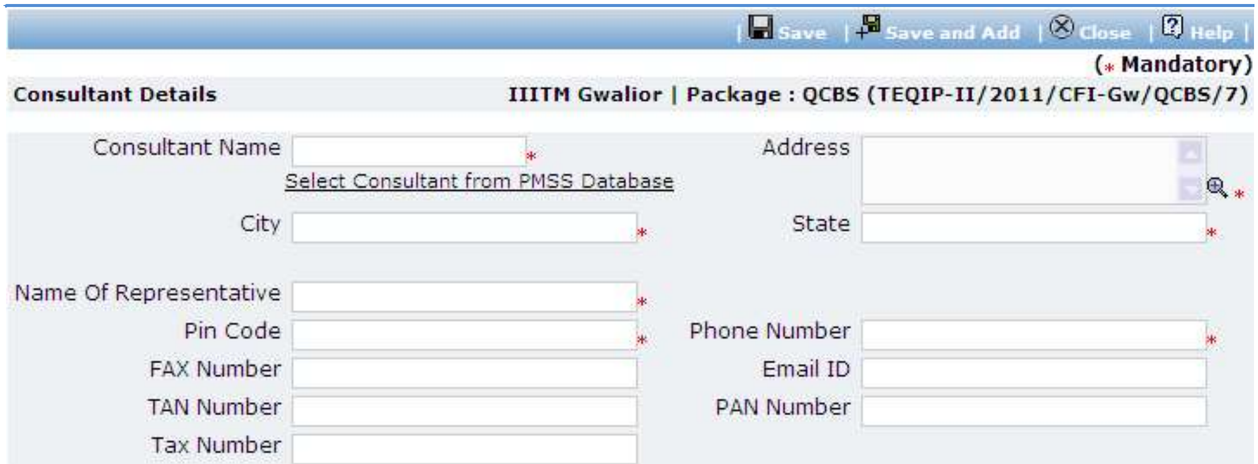
In this stage Advertisement related activities are performed.

'Advt. and EOI' tab is selected by default.

10. Click 'Step 1: Generate Advertisement'. The advertisement will be generated. Save the locally and make necessary changes.
11. Click "Step 2: Fill Advt. Details" link. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Local Paper Name	Enter name of the local newspaper in which the advertisement for procurement of the service will be published.	Sakal
2	National Paper Name	Enter name of the national newspaper in which the advertisement for procurement of the service will be published.	Times of India
3	Date of Release of Advertisement	Please enter date on which the advertisement will be released by your institution to the Publishing Agency/Department. Enter date in DD/MM/YYYY format or select date using calendar. This date cannot be earlier to date on which the procurement was initiated.	
4	Last Date of EOI Submission	This date is the last date for submission of EOI. System will auto-calculate as 21 days from date of Release of Advertisement. If required, you can modify this date by entering date in DD/MM/YYYY format or selecting date using calendar.	15/03/2011
5	Actual Date of Publication (Local)	Enter date in DD/MM/YYYY format or select date using calendar. Please enter date on which the advertisement was published in local news paper.	
6	Actual Date of Publication (National)	Enter date in DD/MM/YYYY format or select date using calendar. Please enter date on which the advertisement was published in national news paper.	

12. Click 'Save'.
13. Click "Step 3: Enter Consultant Details" link. 'Consultant Details' subtab is shown in the lower section.
    a. Click 'Add', which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

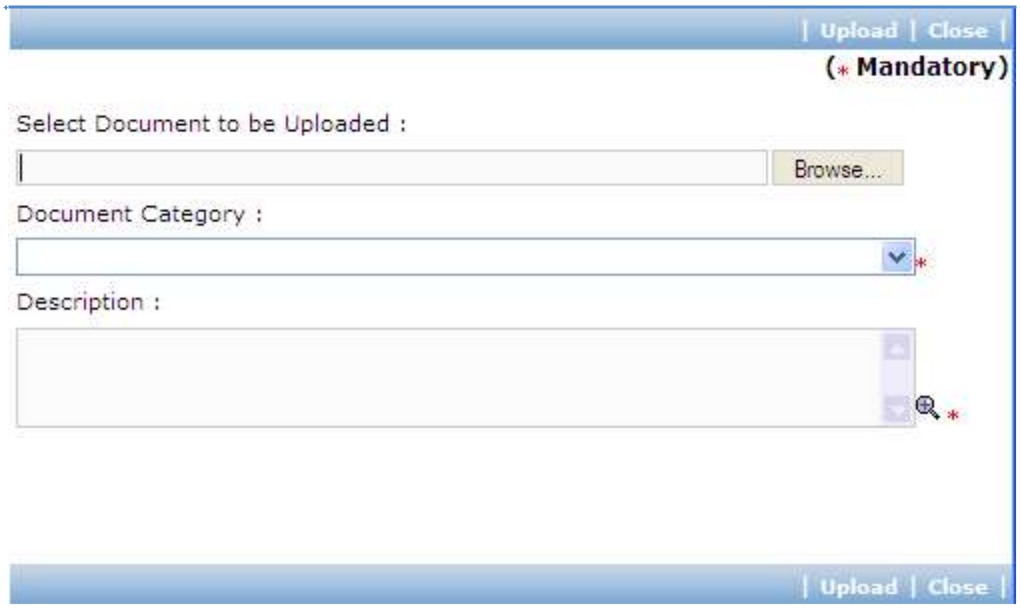
Sr. No.	Field Name	Field Description	Sample Data
1	Consultant Name	Enter Name of the consultant. Consultant can also be searched using 'Select Consultant from PMSS Database' link. Click on this link will display the existing list of consultants, if any. Once the list is displayed, click on the consultant's name. This will auto populated the selected consultant's data. In order to search additional consultants within the state or city use the filters provided on the page.	ABC Consultants
2	Address	Enter the address of the Consultant	STI Towers, Unit# 141/38, Campus 29. RMZ Millenia Business Park. 881, Dr. MGR Road
3	City	Enter the city of the Consultant	Pune
4	State	Enter the state of the Consultant	Maharashtra
5	Email ID	Enter the Email ID of the Consultant	ftti@efttil.com
6	Pin Code	Enter the Pin Code of the Consultant	411232
7	Name Of Representative	Enter the Representative of the Consultant	Mr. Mohan Solanki
8	Phone Number	Enter the Phone Number of the Consultant. To enter more than one number use comma (,) as a separator.	26422689
9	PAN Number	Enter the PAN Number of the Consultant	ANS44874
10	TAN Number	Enter the TAN Number of the Consultant	
11	Tax Number	Enter the TAX Number of the Consultant	

c. Click 'Save'.

d. To add another consultant, repeat steps a to c.

14. Click "Step 4: Upload/View Advertisement" link. 'Documents' subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.
15. Upload the Advertisement Document.

a. Click 'Add' link, which is within the subtab. A popup will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR
3	Description	Enter more information about the uploaded document.	This is approved TOR.

c. Click 'Upload' to upload the document in the system.

d. Uploaded document will appear on the list shown in 'Documents' section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

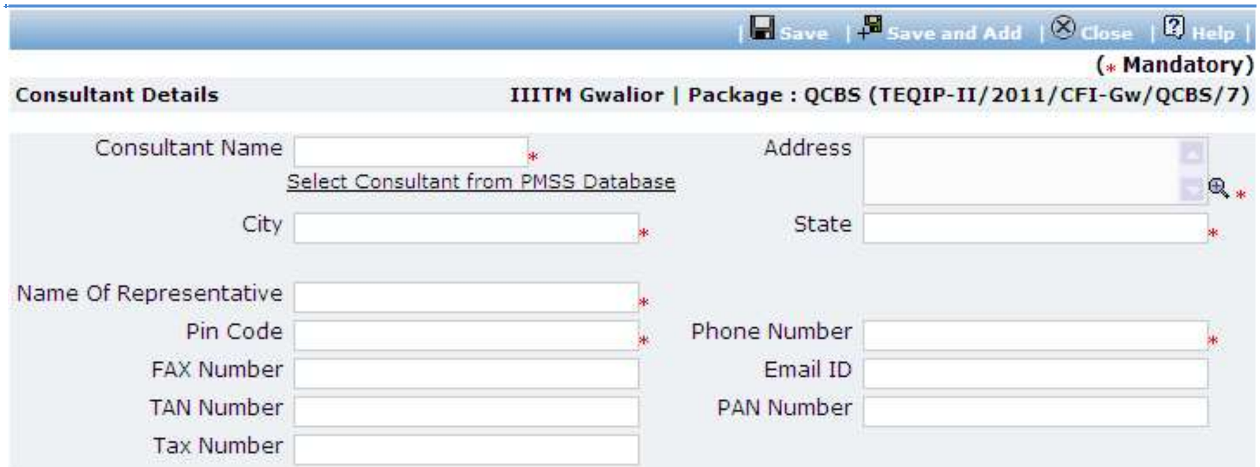
16. On completion of 'Adv & EOI Opening' stage click on 'Move to Next Stage'. This will move the procurement to '**EOI Opening & Shortlisting of Consultants**' stage.

EOI Opening & Shortlisting of Consultants

In this stage the EOI opening is performed and responsive consultants are identified.

'Shortlisting' tab is selected by default.

17. On "Step 1: Fill following Details", fill actual EOI Opening Date in DD/MM/YYYY format or select date using calendar. This date cannot be earlier to date on which the procurement was initiated.
18. Click "Step 2: Add/View Consultants" link. 'Consultant Details' subtab is shown in the lower section.
    a. The subtab displays list of consultants added at 'TOR Generation' stage. If there are any new consultants who have submitted their EOI Proposals, follow these steps to add new consultant;
    b. Click 'Add', which is within the subtab. A pop up will be seen



c. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Consultant Name	Enter Name of the consultant. Consultant can also be searched using 'Select Consultant from PMSS Database' link. Click on this link will display the existing list of consultants, if any. Once the list is displayed, click on the consultant's name. This will auto populated the selected consultant's data. In order to search additional consultants within the state or city use the filters provided on the page.	ABC Consultants
2	Address	Enter the address of the Consultant	STI Towers, Unit# 141/38, Campus 29. RMZ Millenia Business Park. 881, Dr. MGR Road
3	City	Enter the city of the Consultant	Pune
4	State	Enter the state of the Consultant	Maharashtra
5	Email ID	Enter the Email ID of the Consultant	ftti@efttil.com
6	Pin Code	Enter the Pin Code of the Consultant	411232
7	Name Of Representative	Enter the Representative of the Consultant	Mr. Mohan Solanki
8	Phone Number	Enter the Phone Number of the Consultant. To enter more than one number use comma (,) as a separator.	26422689
9	PAN Number	Enter the PAN Number of the Consultant	ANS44874
10	TAN Number	Enter the TAN Number of the Consultant	
11	Tax Number	Enter the TAX Number of the Consultant	

d. Click 'Save'.

e. To add another consultant, repeat steps a to c.

19. Click “Step 3: Print EOI Opening Form” link. This will open EOI opening form. This form can be used during EOI Opening. Print of this form can be taken and EOI opening details can be recorded on this form. The consultant names are seen on this form against which EOI opening details can be mentioned. Shortlisting of consultants can be done using the data filled on this form.

20. Click “Step 4: Shortlisting of Consultants” link. A popup will be seen

a. Fill fields mentioned below for each consultant;

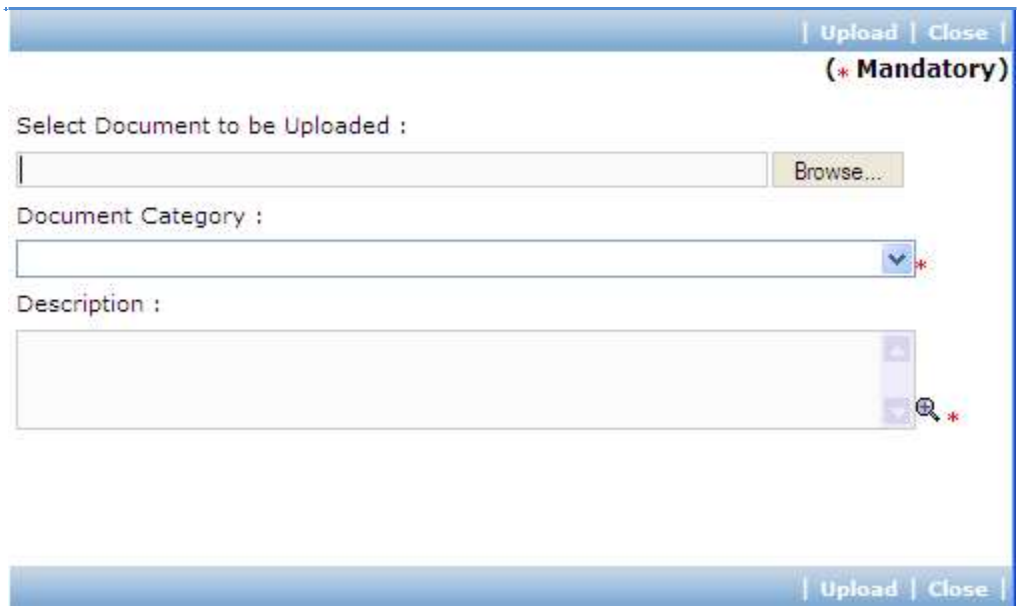
Sr. No.	Field Name	Field Description	Sample Data
1	Is Shortlisted	Select Yes or No. Select Yes if the consultant has been shortlisted Select No if the consultant has not been shortlisted	No
2	Comments	Enter reasons for short listing or rejection of the consultant.	Not adequate project experience

b. Click ‘Save’. At the time of saving, if shortlisted consultants are not 6, the system will ask for confirmation to continue the process.

c. Click ‘Close’ to close the popup window.

21. If shortlisted consultants are not exactly 6, the system will show a message as shown below;

22. Click “Step 5: Upload EOI Opening MOM and EOI Shortlisting” link. ‘Documents’ subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.
23. To upload the EOI Opening MOM Document;
    a. Click ‘Add’ link, which is within the subtab. A popup will be seen



    b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR
3	Description	Enter more information about the uploaded document.	This is approved TOR.

c. Click 'Upload' to upload the document in the system.

d. Repeat the step 1-c to upload EOI Shortlisting document.

e. Uploaded documents will appear on the list shown in 'Documents' section.

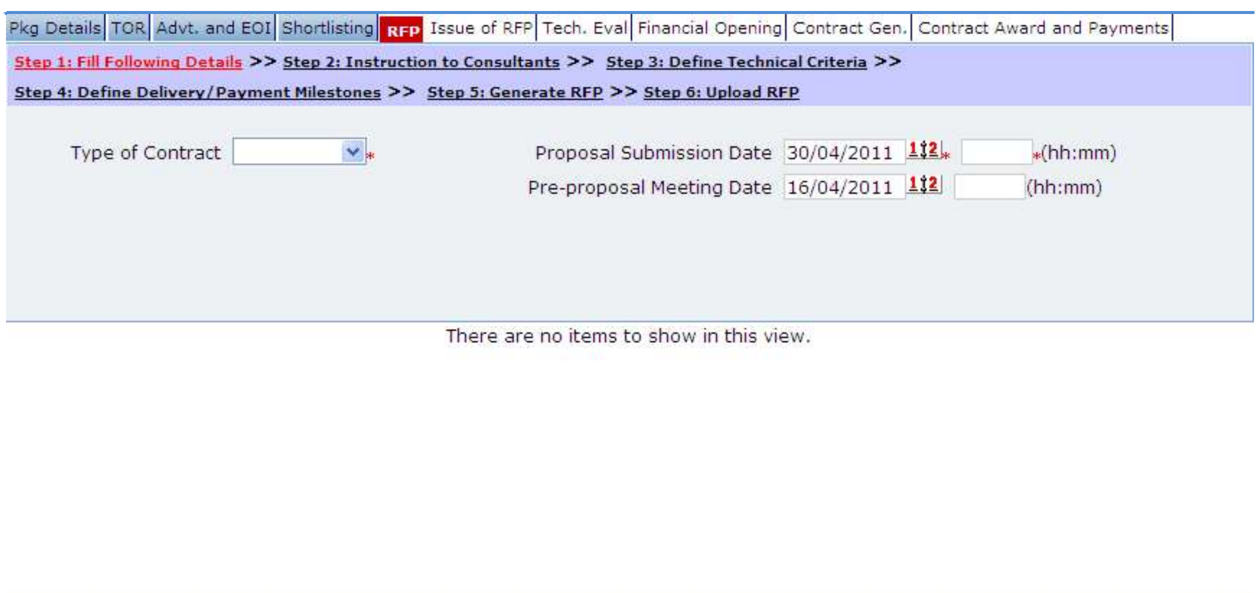
f. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

24. On completion of 'EOI Opening & Shortlisting of Consultants' stage click on 'Move to Next Stage'.
25. If Prior review is applicable to the procurement, it will be sent for prior review. Please refer section 'Prior Review Scenarios' for details.
26. After necessary approvals are obtained, the procurement will move to the next stage '**RFP Preparation**'.

RFP Preparation

In this stage the required information for RFP is accepted and RFP document is generated.

'RFP' tab is selected by default.

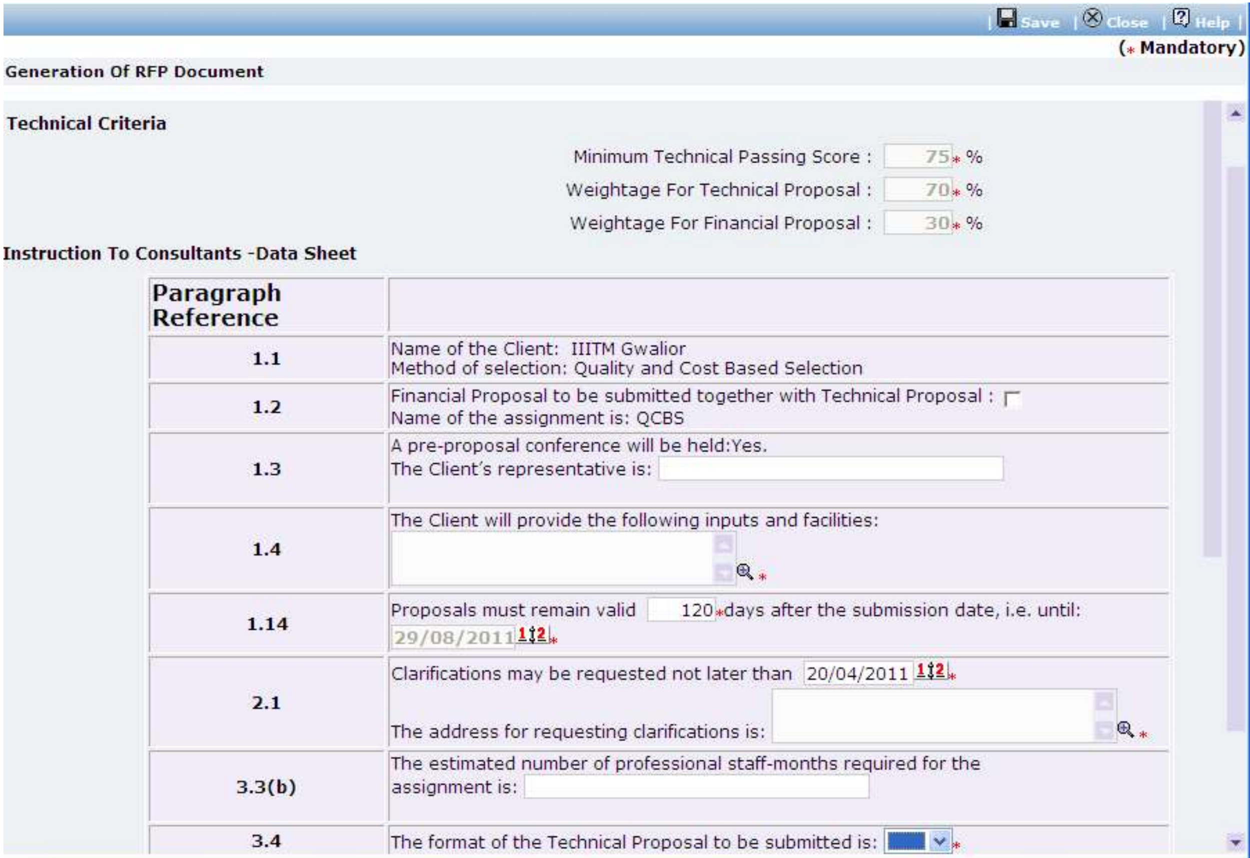


27. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data

1	Type of Contract	Select appropriate Contract Type from the list– Lump sum or Timebased. According to Procurement Manual, Lump-sum contracts are used for assignments in which the content and the duration of the work are clearly defined. Time Based Contracts are used for assignments in which it is difficult to define the scope and the duration of the work to be performed. This is one of the important fields.	Lump sum
2	Proposal Submission Date	This date is the last date for submission of Proposal. System will auto-calculate and display this date as 45 days from date of Release of Advertisement. If required, you can modify this date by entering date in DD/MM/YYYY format or selecting date using calendar. If you modify this date, please verify Pre-proposal Meeting Date. This date should be atleast 45 days from date of Release of Advertisement.	30/04/2011
3	Proposal Submission Time	Enter Time in HH:MM format	11:00
4	Pre-proposal Meeting Date	This date is the last date for submission of Proposal. System will auto-calculate and display this date as 14 days prior to Proposal Submission Date. If required, you can modify this date by entering date in DD/MM/YYYY format or selecting date using calendar.	16/04/2011
5	Pre-proposal Meeting Time	Enter Time in HH:MM format	12:00

28. Click “Step 2: Instruction to Consultants” link. A popup will be seen;



a. Fill the fields on the page. Details of the fields are mentioned below;

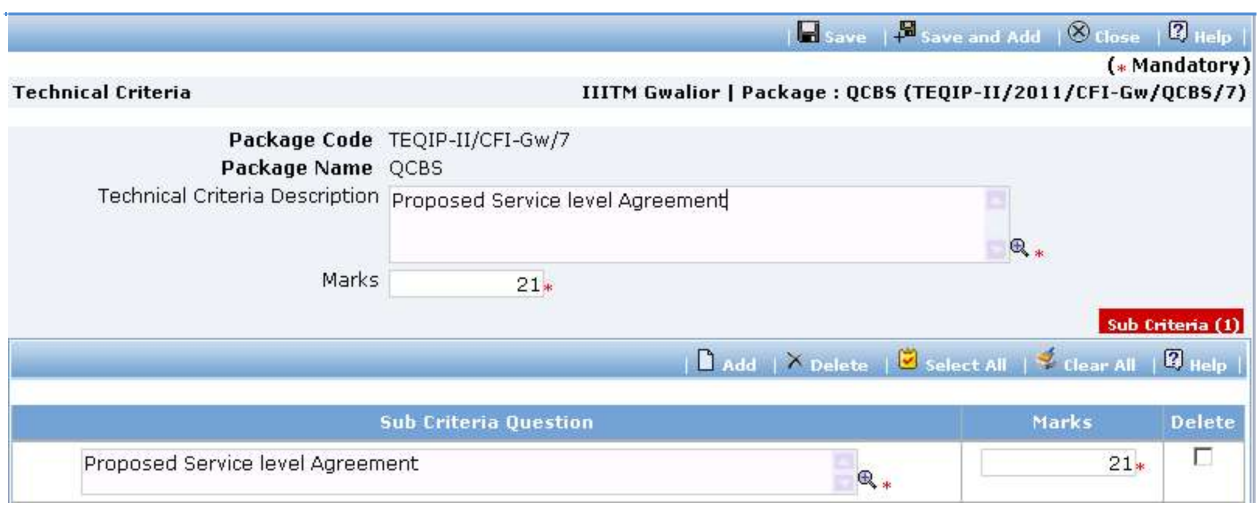
Sr. No.	Field Name	Field Description	Sample Data
1	Min Score for Technical Proposal	This is minimum qualifying score for Technical Proposals. This will be auto-populated by the system.	75
2	Weightage for technical proposal	This is weightage for technical proposal. This will be auto-populated by the system.	75
3	Weightage for financial proposal	This is weightage for financial proposal. This will be auto-populated by the system.	25
4	1.2	Select the checkbox if Financial Proposal is required along with technical proposal	
5	1.3	Enter name of the representative from the client	Prof A U Digraskar, CPA, NPIU
6	1.4	Enter inputs and facilities to be provided by the client	(i) An orientation about the agreed procurement procedures for the project; (ii) Procurement Manual developed for the

			project;
7	1.14	Enter Proposal Validity Period in days. Based on this value Proposal Validity Date will be auto-calculated by the system.	120
8	2.1	This date is the last date for seeking clarifications on the RFP This date will be auto-calculated by the system as 10 days prior to Proposal Submission Date. If required, you can modify this date by entering date in DD/MM/YYYY format or selecting date using calendar. This date should not be less than last date of EOI submission.	20/04/2011
8	2.1	Enter of address for requesting clarifications	National Project Implementation Unit EdCIL House, 4th Floor, 18- A, Sector 16- A, Gautum Budh Nagar, Noida (U.P) – 201301
9	3.3(b)	Enter estimated number of staff months for this assignment	40
10	3.4	Select the format of technical Proposal required to be submitted by the consultants – FTP or STP This depends on nature of the assignment	FTP
11	3.4(g)	Enter here training related needs, if any. Select the checkbox is the training is needed and enter information about training requirement in the given text area.	The consultant will undertake one day Training and Orientation, estimated to be 40 Training Days (One Day training is estimated for each batch, comprising 20-25 end users.)
12	3.7	This information is related to local taxation is applicable. Select 'Yes' from the list if the location taxation is to be applied to the amounts paid to the consultant under the contract.	Yes
13	4.3	Enter no. of copies of proposal to be submitted	2
14	4.5	Enter address where proposal should be submitted.	National Project Implementation Unit EdCIL House, 4th Floor, 18- A,

			Sector 16- A, Gautum Budh Nagar, Noida (U.P) – 201301
15	6.1	Enter expected contract negotiation date. If required, you can modify this date by entering date in DD/MM/YYYY format or selecting date using calendar. This date should not be less than last date of submission of Proposal.	01/06/2011
16	6.1	Enter address of location at which contract negotiation meeting will be conducted	National Project Implementation Unit EdCIL House, 4th Floor, 18- A, Sector 16- A, Gautum Budh Nagar, Noida (U.P) – 201301
17	7.2	Enter expected date on which the contract will be commenced	15/06/2011
18	7.2	Enter location at which consulting services will be commenced	NPIU, Noida

b. Click ‘Save’.

29. Click “Step 3: Define Technical Criteria” link. ‘Technical Criteria’ subtab is shown in the lower section.
30. Initially, list of some default technical criterias will be displayed. These are some basic criterias added by NPIU Administrator as part of configuration settings of the system.
31. You can add new criteria, modify or delete existing criterias.
    a. To add new criteria, Click ‘Add’ which is within the subtab. A pop up will be seen



    b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Technical Criteria Description	Enter name of technical criteria. This name will appear in bidding documents and evaluation forms.	Experience of the organisation/ consultant relevant to the assignment
2	Marks	Total marks for this technical criteria	9

c. Click 'Save'

d. To add sub-criteria , click on the 'Add', which is in the 'Sub Criteria' section. A row will appear where the sub-criteria can be added.

e. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Sub Criteria Question	Enter Sub Criteria description	Specific experience in software development related to procurement management (indicate max. 2 projects in last 3 years)
2	Marks	Enter marks for the sub-criteria	5

f. To add another sub-criteria, repeat steps a to c. Click 'Save'.

32. To add another criteria, repeat steps a to f.
33. Please ensure that total of marks for all technical criteria defined for the procurement is exactly 100.
34. Click "Step 4: Define Milestones" link. 'Milestones' subtab is shown in the lower section.

a. To add a milestone, Click 'Add' which is within the subtab. A pop up will be seen

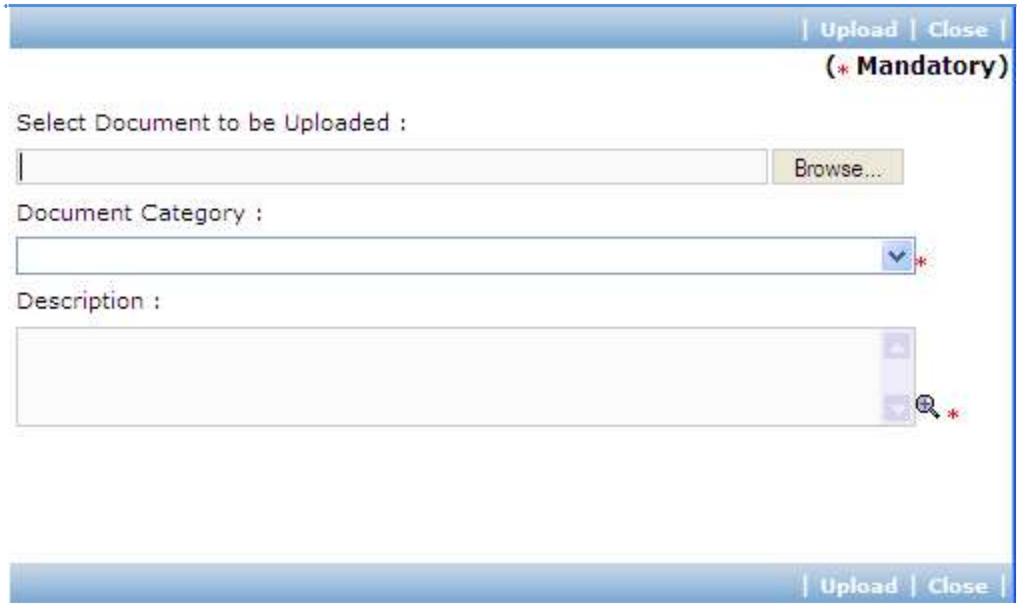
b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Milestone Name	Enter name of the milestone	BRD Signoff
2	Milestone Description	Enter description for the milestone	After BRD signoff
3	Payment Amount (%)	Enter percentage of amount to be paid for this milestone Total of Payment Amount % for all milestones should be exactly 100.	10
4	Expected Delivery Period	Enter period in days in which this milestone should be accomplished. In later stages of the procurement, expected delivery date will be calculated using this value.	30

c. Click 'Save' or 'Save and Add'. 'Save and Add' link should be used if you want to save the data and add another milestone. Alternatively, you can click 'Save' and to repeat steps a to c.

35. Please ensure total of 'Payment Amount %' for all milestones is exactly 100.
36. Click 'Step 5: Generate RFP'. The RFP document will be generated. Save the file locally and make necessary changes to the sections highlighted in yellow. Before generating the document, system validates the required information and prompts for missing information.
37. After completing changes to the locally saved RFP document, click "Step 6: Upload RFP" link. 'Documents' subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.
38. Upload the RFP Document.

    a. Click 'Add' link, which is within the subtab. A popup will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR
3	Description	Enter more information about the uploaded document.	This is approved TOR.

c. Click 'Upload' to upload the document in the system.

d. Uploaded document will appear on the list shown in 'Documents' section.

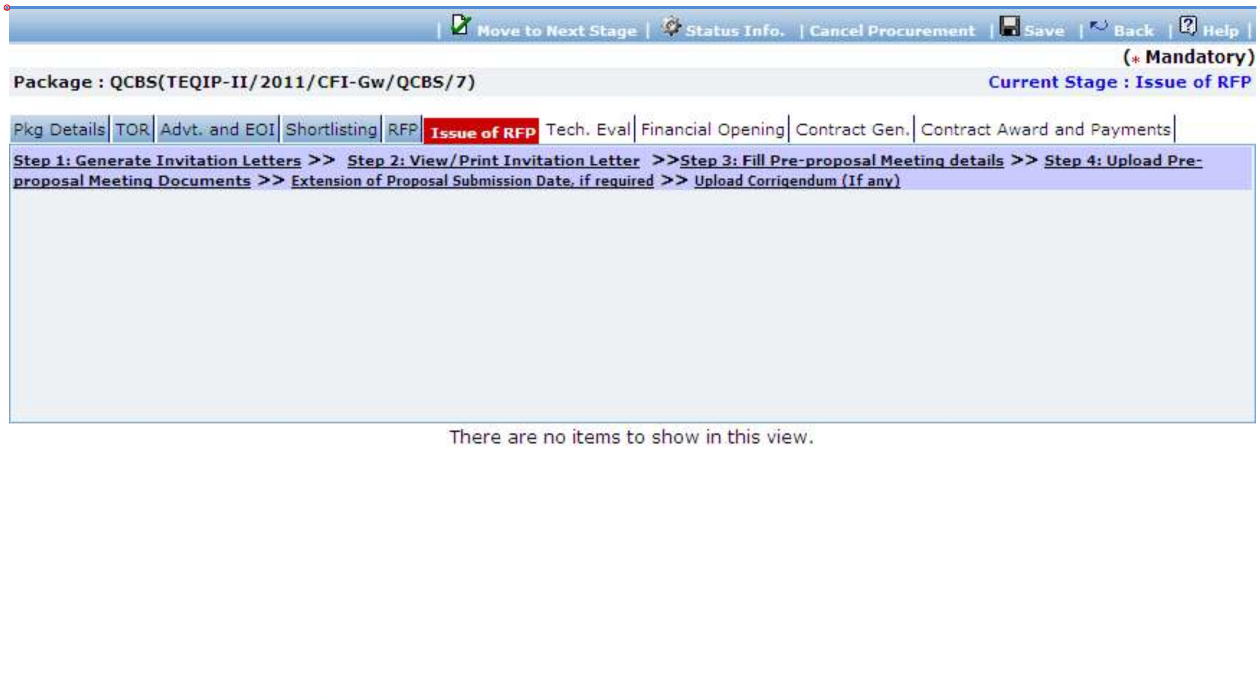
e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

39. On completion of 'RFP Generation' stage click on 'Move to Next Stage'.
40. If Prior review is applicable to the procurement, it will be sent for prior review. Please refer section 'Prior Review Scenarios' for details.
41. After necessary approvals are obtained, the procurement will move to the next stage '**Issue of RFP**'.

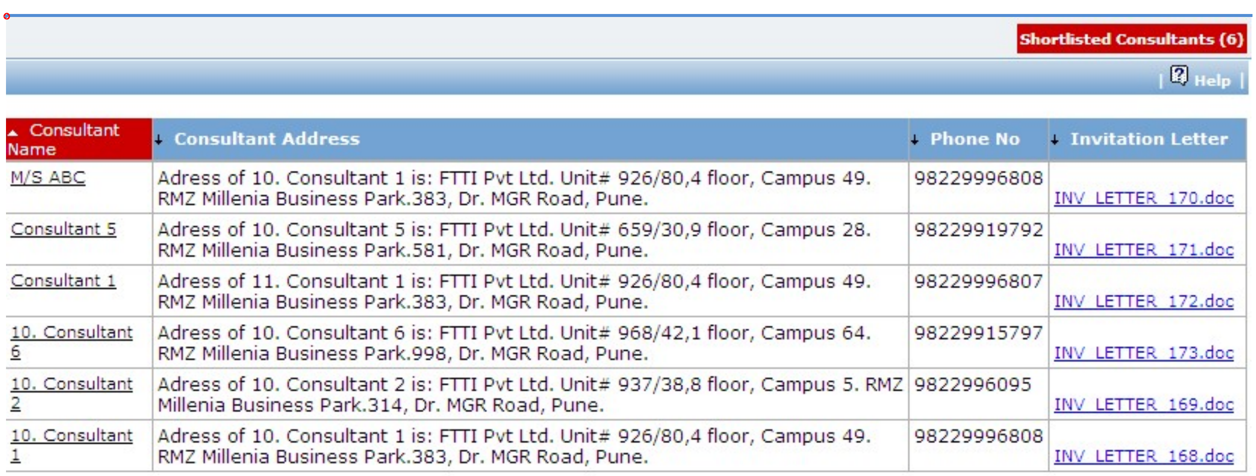
Issue of RFP

In this stage invitation letters are generated for shortlisted consultants and RFP document is issued to them. Pre-proposal meeting details are also recorded in this stage.

'Issue of RFP' tab is selected by default.



42. Click 'Step 1: Generate Invitation Letters' link. Request will be sent for generating Invitation letters for shortlisted consultants. The letters are generated by a separate service. Please revisit this page after some time to view or print the letters.
43. Click 'Step 2: View/Print Invitation Letters' link. 'Shortlisted Consultants' subtab is shown in the lower section. This subtab lists consultants which are been shortlisted.

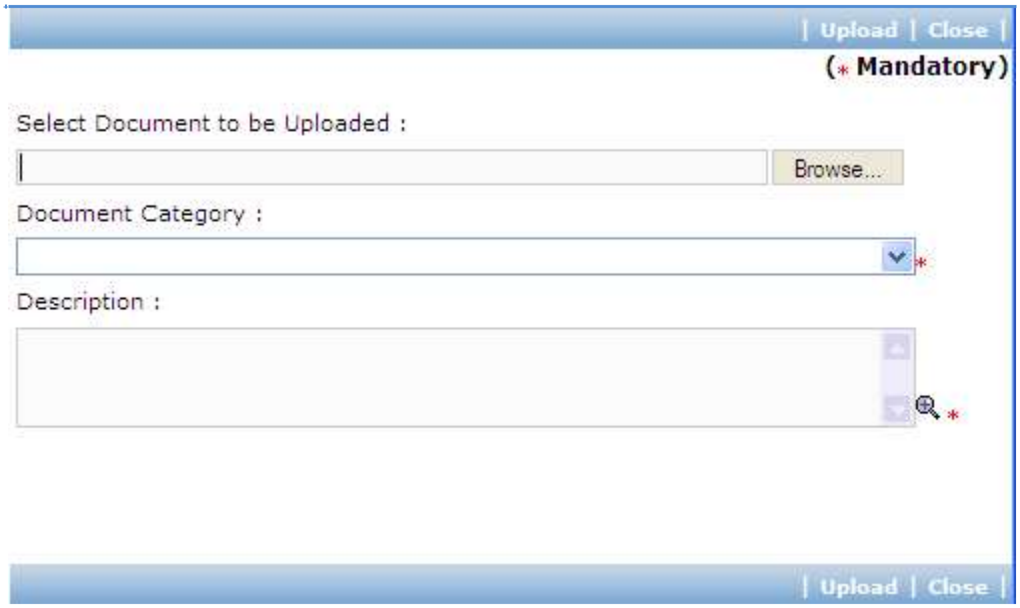


Consultant Name	Consultant Address	Phone No	Invitation Letter
M/S ABC	Adress of 10. Consultant 1 is: FTTI Pvt Ltd. Unit# 926/80,4 floor, Campus 49. RMZ Millenia Business Park.383, Dr. MGR Road, Pune.	98229996808	INV_LETTER_170.doc
Consultant 5	Adress of 10. Consultant 5 is: FTTI Pvt Ltd. Unit# 659/30,9 floor, Campus 28. RMZ Millenia Business Park.581, Dr. MGR Road, Pune.	98229919792	INV_LETTER_171.doc
Consultant 1	Adress of 11. Consultant 1 is: FTTI Pvt Ltd. Unit# 926/80,4 floor, Campus 49. RMZ Millenia Business Park.383, Dr. MGR Road, Pune.	98229996807	INV_LETTER_172.doc
10. Consultant 6	Adress of 10. Consultant 6 is: FTTI Pvt Ltd. Unit# 968/42,1 floor, Campus 64. RMZ Millenia Business Park.998, Dr. MGR Road, Pune.	98229915797	INV_LETTER_173.doc
10. Consultant 2	Adress of 10. Consultant 2 is: FTTI Pvt Ltd. Unit# 937/38,8 floor, Campus 5. RMZ Millenia Business Park.314, Dr. MGR Road, Pune.	9822996095	INV_LETTER_169.doc
10. Consultant 1	Adress of 10. Consultant 1 is: FTTI Pvt Ltd. Unit# 926/80,4 floor, Campus 49. RMZ Millenia Business Park.383, Dr. MGR Road, Pune.	98229996808	INV_LETTER_168.doc

44. Click on link in ‘Invitation Letter’ column to view the invitation letter for the consultant. Save the file locally and make necessary changes to the sections highlighted in yellow.
45. Issue of RFP to the consultants is an offline process. Please follow the steps below to create RFP document to be issued to a consultant ;
    a. Open the invitation letter for the consultant and copy the contents.
    b. Open the RFP document and locate section ‘Section 1. Letter of Invitation’ in the document.
    c. Replace the copied invitation letter in place of ‘<Note: Replace the Invitation Letter here.>’
    d. Save the RFP document with a new suitable name.
    e. Repeat steps a to d for all shortlisted consultants.
46. After completing these steps, you can proceed to sending the RFP documents to the consultants along with other essential documents.
47. Click “Step 3: Fill Pre-proposal Meeting Details” link.
48. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Actual Pre proposal Date	Enter date on which Pre-proposal meeting was conducted Enter date in DD/MM/YYYY format or select date using calendar.	21/03/2011
2	Pre-proposal MOM	Enter Minutes of Pre-proposal Meeting. Alternatively you can provide summary about the meeting in this text box and upload a separate Pre-proposal MOM document as part of ‘Step 4 – Upload Pre-proposal Meeting Documents’.	Please see details in ‘Pre-Proposal Meeting Document’
3	Clarification Issued to all Consultants	Select Yes or No or Not required. Select Not required if there are no clarifications that can be issued. Select No if clarifications have not yet been issued to the consultants. Select Yes if clarifications are issued to all the consultants.	Yes
4	Date of Clarification Issued	Enter date on which clarifications are issued to the consultants. Enter date in DD/MM/YYYY format or select date using calendar. This date should not be less than Pre-proposal Meeting date.	22/03/2011
5	Clarification Details	Enter details of clarification issued to the consultants.	Revised copy of Procurement Manual has been circulated.

49. Click ‘Save’.
50. Click “Step 4: Upload Pre-proposal Meeting Documents” link. ‘Documents’ subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.
51. Upload Pre-proposal Meeting related documents. The documents can include Pre-proposal Meeting Minutes, presentations exhibited during the meeting, clarifications etc.
    a. Click ‘Add’ link, which is within the subtab. A popup will be seen



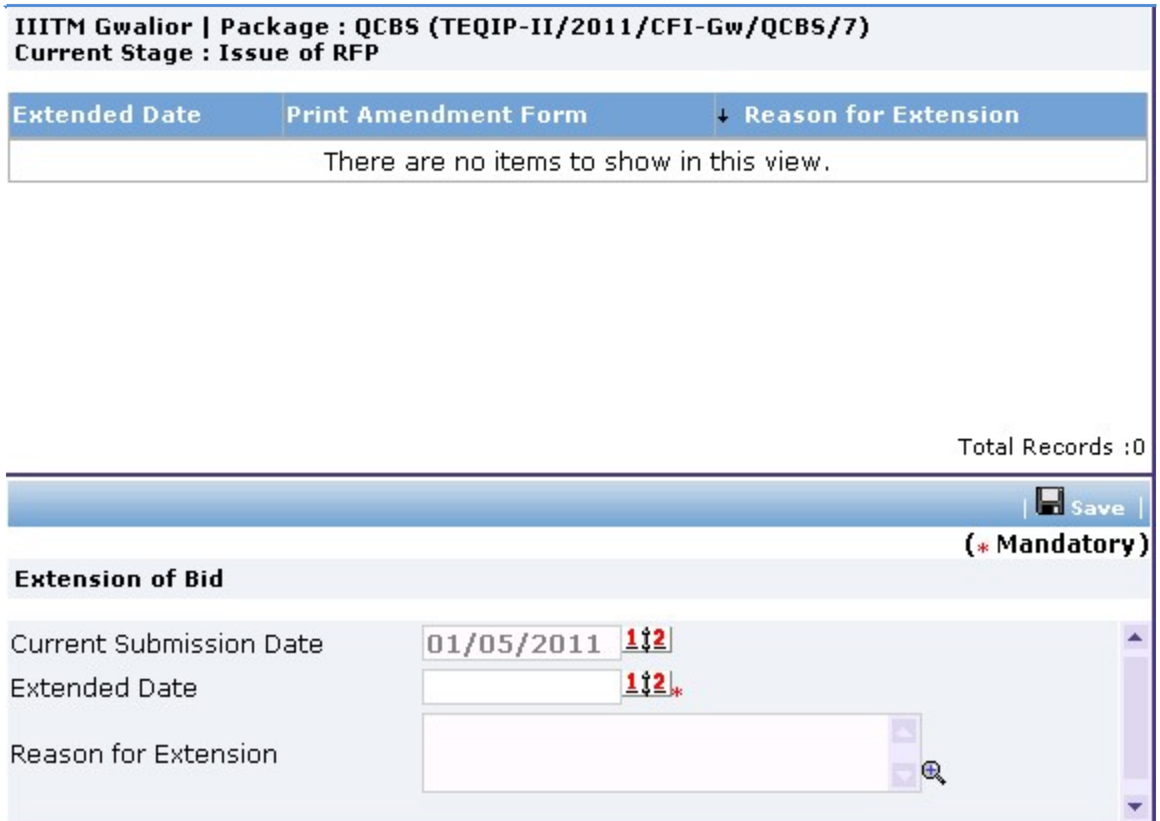
    b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR
3	Description	Enter more information about the uploaded document.	This is approved TOR.

    c. Click ‘Upload’ to upload the document in the system.
    d. Uploaded document will appear on the list shown in ‘Documents’ section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

52. If Extension of Proposal Submission Date is required, click link 'Extension of Proposal Submission Date, if required'. A popup will be seen;



a. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Current Submission Date	This will be displayed by the system and cannot be edited.	01/05/2011
2	Extended Date	Enter new Proposal Submission Date. Enter date in DD/MM/YYYY format or select date using calendar. This date should not be less than current Submission Date.	10/05/2011
3	Reason for Extension	Specify reason for extending the date.	Scope of Procurement Plan module has been revised.

b. Click ‘Save’

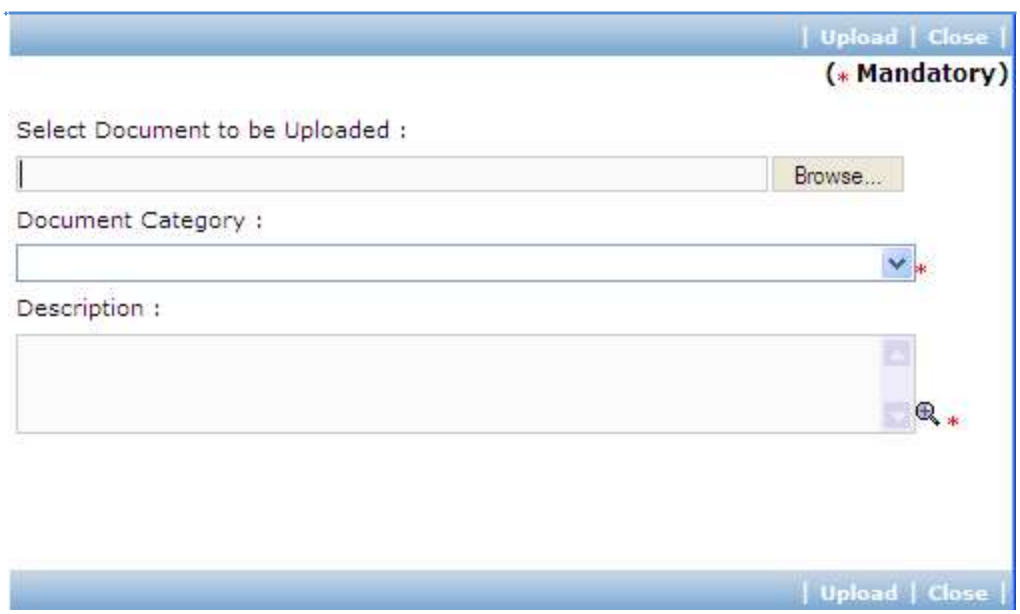
c. A record for the extended date will be added to the list on the top of the page.

d. Click ‘Print Amendment Form’ link to generate the amendment letter. Save the file locally. The letter should be sent to all shortlisted consultants.

53. If there is any corrigendum/addendum issued to the consultants, Click “Step 4: Upload Corrigendum” link. ‘Documents’ subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.

54. Upload the corrigendum/addendum document.

a. Click ‘Add’ link, which is within the subtab. A popup will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR
3	Description	Enter more information about the uploaded document.	This is approved TOR.

c. Click ‘Upload’ to upload the document in the system.

d. Uploaded document will appear on the list shown in ‘Documents’ section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

55. On completion of ‘Issue of RFP’ stage click on ‘Move to Next Stage’. This will move the procurement to ‘**Technical Evaluation**’ stage.

Technical Evaluation

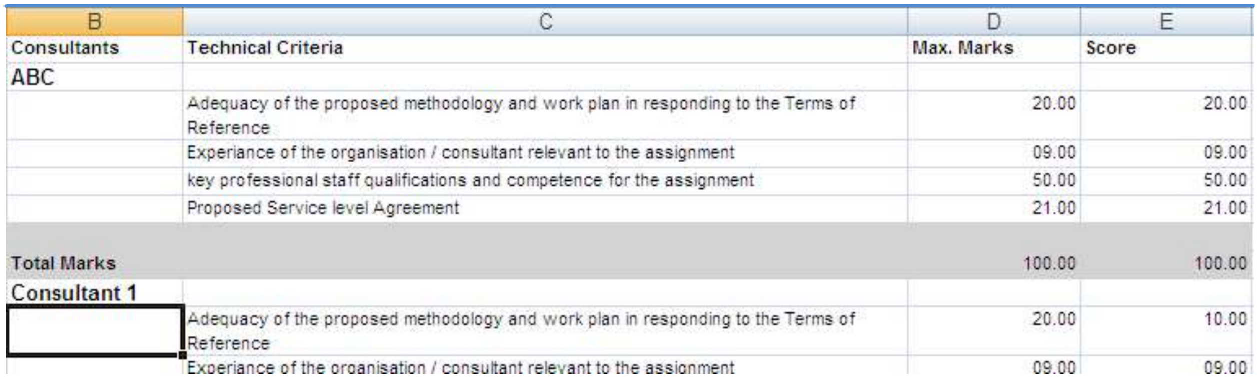
In this stage Technical Proposal are evaluated and technical scores are calculated for the Proposals. 'Technical Evaluation' tab is selected by default.

56. As step 1, fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Technical Proposal Opening Date	Enter date on which technical proposals are opened and evaluated. Enter date in DD/MM/YYYY format or select date using calendar.	13/05/2011

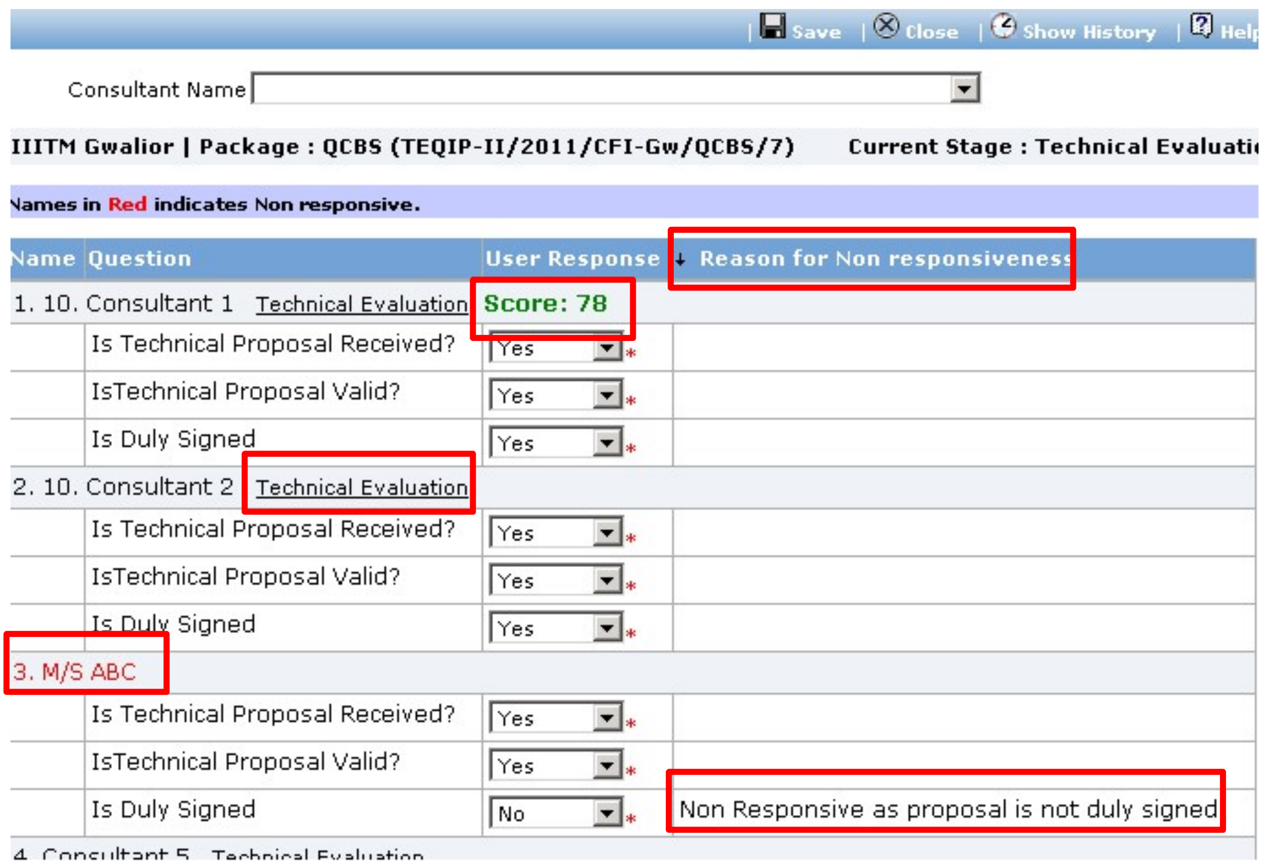
57. Click 'Save'.
58. Click "Step 2: Tech Proposal Opening Form" link. This will open Technical Proposal opening form. This form can be used during Technical Opening Meeting. Print of this form can be taken and Technical Proposal opening details can be recorded on this form. The consultant names are seen on this form against which Technical opening details can be mentioned.

59. Click “Step 3: Tech Eval Report” link. This will open Technical Evaluation Report in form of an excel sheet. Save the document locally. This document can be used during Technical Proposal Evaluation. Technical scores on different criterias can be recorded in this excel sheet.



B	C	D	E
Consultants	Technical Criteria	Max. Marks	Score
ABC			
	Adequacy of the proposed methodology and work plan in responding to the Terms of Reference	20.00	20.00
	Experiance of the organisation / consultant relevant to the assignment	09.00	09.00
	key professional staff qualifications and competence for the assignment	50.00	50.00
	Proposed Service level Agreement	21.00	21.00
Total Marks		100.00	100.00
Consultant 1			
	Adequacy of the proposed methodology and work plan in responding to the Terms of Reference	20.00	10.00
	Experiance of the organisation / consultant relevant to the assignment	09.00	09.00

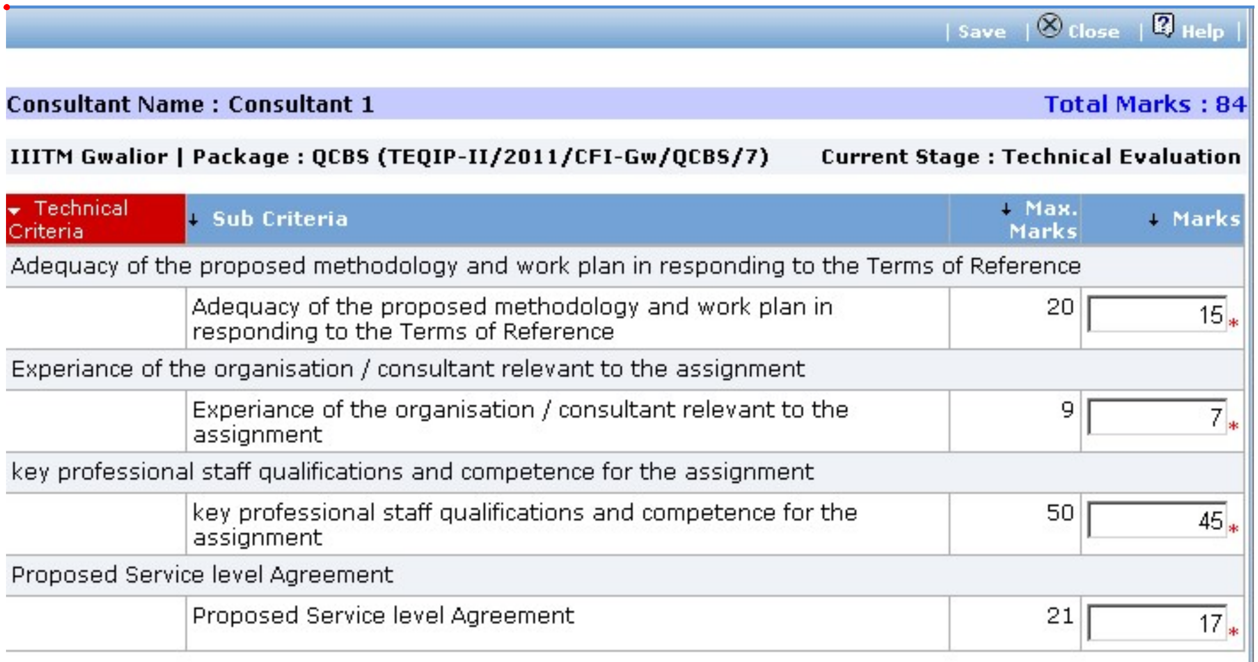
60. Click “Step 4: Enter Tech Proposal Opening Data” link. A popup will be seen;



61. Fill Technical Proposal Opening data on this page which was recorded as part of ‘Step 2: Tech Proposal Opening Form’.

62. Click ‘Save’

63. System will identify non-responsive consultants based on entered data. Reason for non-responsiveness will be shown in ‘Reason for Non-responsiveness’ column. Non-responsive Consultants are marked in Red.
64. ‘Technical Evaluation’ link will be shown against Responsive Consultant names.
65. Fill Technical Score for all responsive consultants
    a. Click ‘Technical Evaluation’ link against a consultant. A popup will be seen;



| Save | Close | Help |

Consultant Name : Consultant 1 Total Marks : 84

IIITM Gwalior | Package : QCBS (TEQIP-II/2011/CFI-Gw/QCBS/7) Current Stage : Technical Evaluation

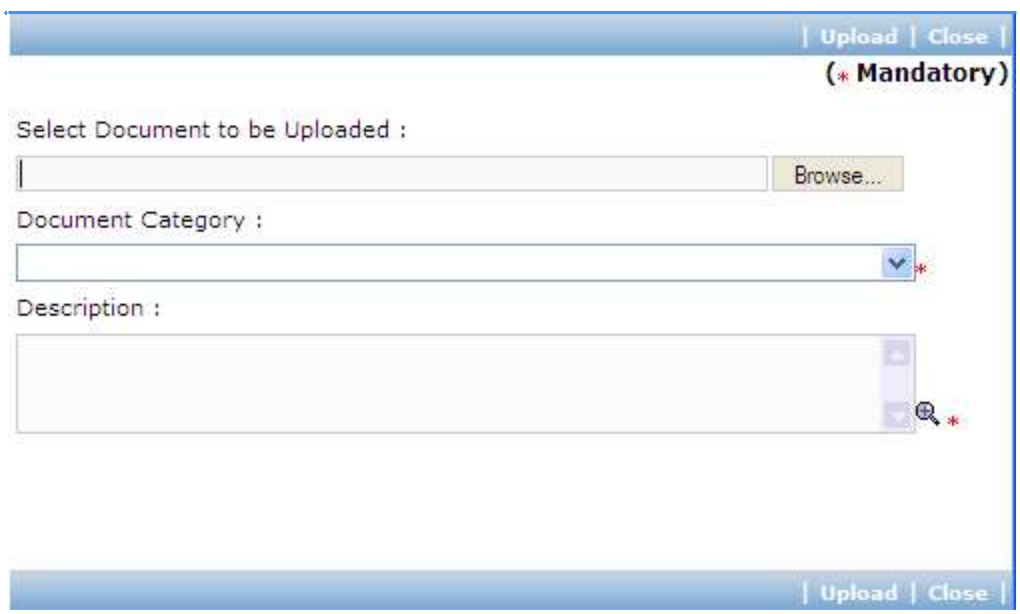
Technical Criteria	Sub Criteria	Max. Marks	Marks
Adequacy of the proposed methodology and work plan in responding to the Terms of Reference			
	Adequacy of the proposed methodology and work plan in responding to the Terms of Reference	20	15 *
Experiance of the organisation / consultant relevant to the assignment			
	Experiance of the organisation / consultant relevant to the assignment	9	7 *
key professional staff qualifications and competence for the assignment			
	key professional staff qualifications and competence for the assignment	50	45 *
Proposed Service level Agreement			
	Proposed Service level Agreement	21	17 *

    b. Fill score for each technical criteria/sub-criteria.
    c. Click ‘Save’.
    d. System will calculate and display total marks obtained by the consultant.
    e. Click ‘Close’.
66. Score obtained by the consultant will be shown against the consultant name. System evaluates and ranks the consultants based on their scores.
67. After recording technical evaluation details for all responsive consultants, Click ‘Close’ link to close the popup.
68. Click ‘Step 5: Print Invitation Letter’ link. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Planned Financial Proposal Opening Date	Enter date on which financial proposals will be opened. Enter date in DD/MM/YYYY format or select	13/05/2011

		date using calendar. This date should not be less than Technical Proposal Opening Date.	
2	Planned Financial Proposal Opening Time	Enter time at which financial proposals will be opened. Enter the time in HH:MM format. Planned Financial Opening Date and Time will appear in invitation letters for financial proposal opening meeting sent to technically responsive consultants.	11:00

69. Click ‘Save’
70. ‘Consultant Score’ subtab is shown in the lower section. This subtab lists technical responsive consultants and their scores. Technical Responsive consultants are the consultants for whom technical evaluation scores are entered in the system.
71. On ‘Consultant Score’ list, link ‘Invitation Letter for Financial Proposal Opening’ will be shown for consultants who have obtained minimum qualifying technical score specified in RFP document.
72. Click ‘Invitation Letter for Financial Proposal Opening’ link against each consultant to generate the invitation letter for the financial proposal opening meeting to the consultant. Save the letter locally and send to the consultant.
73. Click “Step 5: Upload Opening Form and Eval Report” link. ‘Documents’ subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.
74. Upload copy of duly signed Technical Proposal Opening Form.
    a. Click ‘Add’ link, which is within the subtab. A popup will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR
3	Description	Enter more information about the uploaded document.	This is approved TOR.

c. Click 'Upload' to upload the document in the system.

d. Uploaded document will appear on the list shown in 'Documents' section.

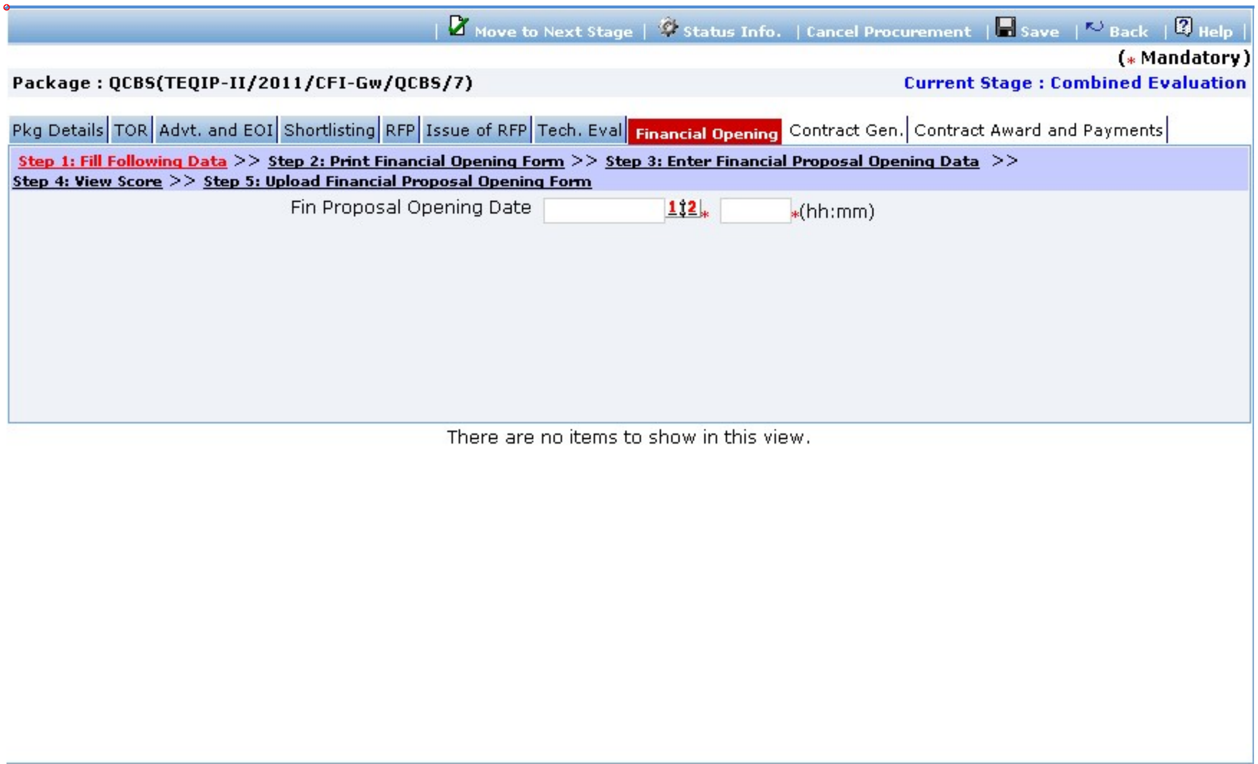
e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

75. Upload Technical Proposal Evaluation Report following above steps.
76. On completion of 'Technical Evaluation' stage click on 'Move to Next Stage'.
77. If Prior review is applicable to the procurement, it will be sent for prior review. Please refer section 'Prior Review Scenarios' for details.
78. After necessary approvals are obtained, the procurement will move to the next stage '**Combined Evaluation**'.

Combined Evaluation

In this stage combined evaluation of the technical and financial proposals submitted by the consultants will be performed.

'Financial Opening' tab is selected by default.



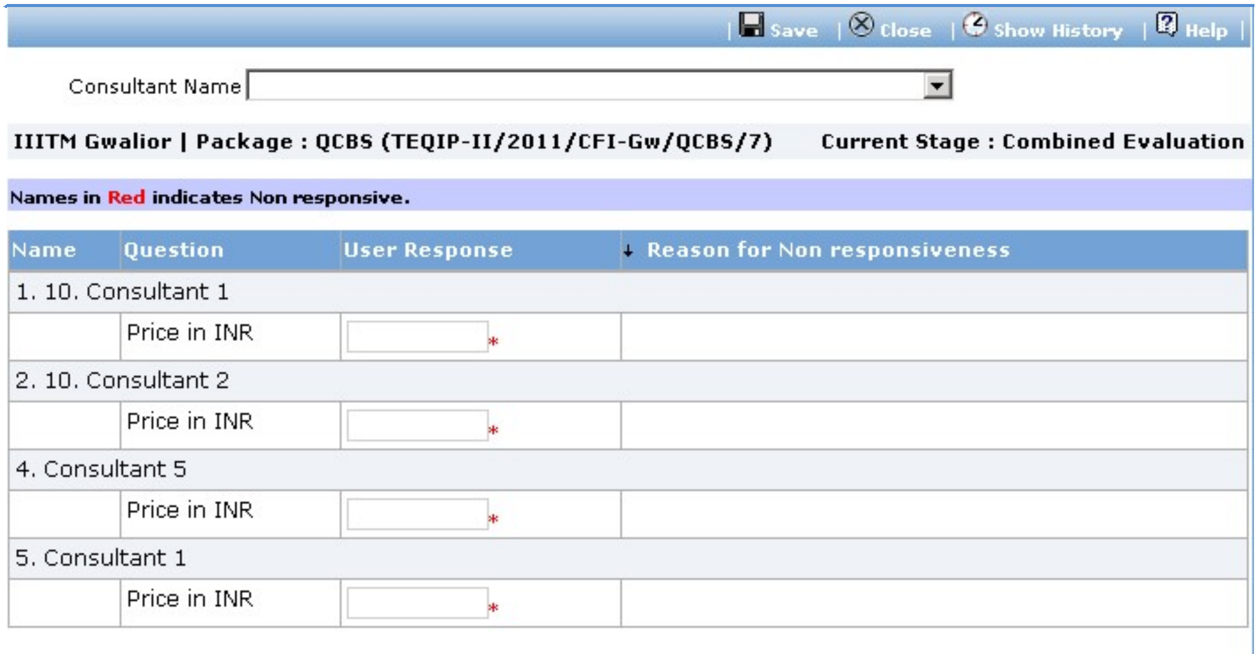
79. As step 1, fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Financial Proposal Opening Date	Enter date on which financial proposals are opened. Enter date in DD/MM/YYYY format or select date using calendar. This date should not be less than Technical Proposal Opening Date.	16/05/2011
2	Financial Proposal Opening Time	Enter time at which financial proposals are opened. Enter the time in HH:MM format. Planned Financial Opening Date and Time will appear in invitation letters for financial proposal opening meeting sent to technically responsive consultants.	11:00

80. Click ‘Save’.

81. Click “Step 2: Print Financial Opening Form” link. This will open Financial Proposal Opening Form. This form can be used during Financial Opening Meeting. Print of this form can be taken and Financial Proposal opening details can be recorded on this form. The consultant names are seen on this form against which financial opening details can be mentioned.

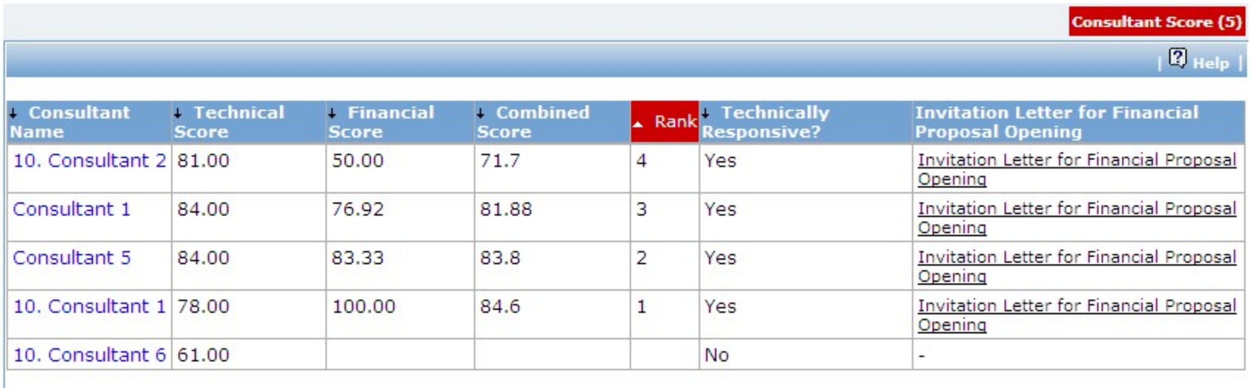
82. Click “Step 3: Enter Financial Proposal Opening Data” link. A popup will be seen;



83. Fill Price in INR for all technically responsive consultants.
84. Click ‘Save’.
85. System will calculate total score and rank for all consultants
    a. System will calculate financial scores based on lowest price in INR.
    b. Lowest Priced proposal will be given financial score as 100. Financial scores for other consultants will be calculated using formula

       Sf = 100 x Fm / F (Sf is the financial score, Fm is the lowest price and F the price of the proposal)
    c. Total Score will be calculated as technical score + financial score.
    d. Consultants will be ranked. Consultants with highest total score will be ranked as 1.
86. System will automatically select and display consultant with highest total score for inviting for negotiations.

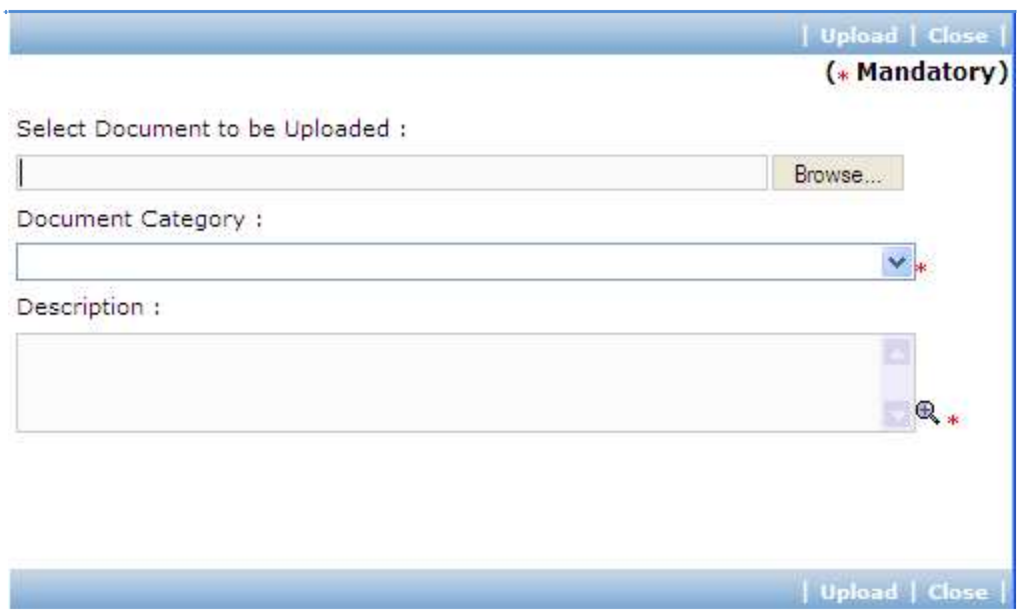
87. Click “Step 4: View Score” link. ‘Consultant Score’ subtab is shown in the lower section.


Consultant Score (5)

| Help |

Consultant Name	Technical Score	Financial Score	Combined Score	Rank	Technically Responsive?	Invitation Letter for Financial Proposal Opening
10. Consultant 2	81.00	50.00	71.7	4	Yes	Invitation Letter for Financial Proposal Opening
Consultant 1	84.00	76.92	81.88	3	Yes	Invitation Letter for Financial Proposal Opening
Consultant 5	84.00	83.33	83.8	2	Yes	Invitation Letter for Financial Proposal Opening
10. Consultant 1	78.00	100.00	84.6	1	Yes	Invitation Letter for Financial Proposal Opening
10. Consultant 6	61.00				No	-

88. This subtab displays list of consultants, their technical and combined scores and overall rank.
89. Click "Step 5: Upload Financial Proposal Opening Form" link. 'Documents' subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.
90. Upload copy of duly signed Financial Proposal Opening Form.
    a. Click 'Add' link, which is within the subtab. A popup will be seen



    b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR

3	Description	Enter more information about the uploaded document.	This is approved TOR.

c. Click 'Upload' to upload the document in the system.

d. Uploaded document will appear on the list shown in 'Documents' section.

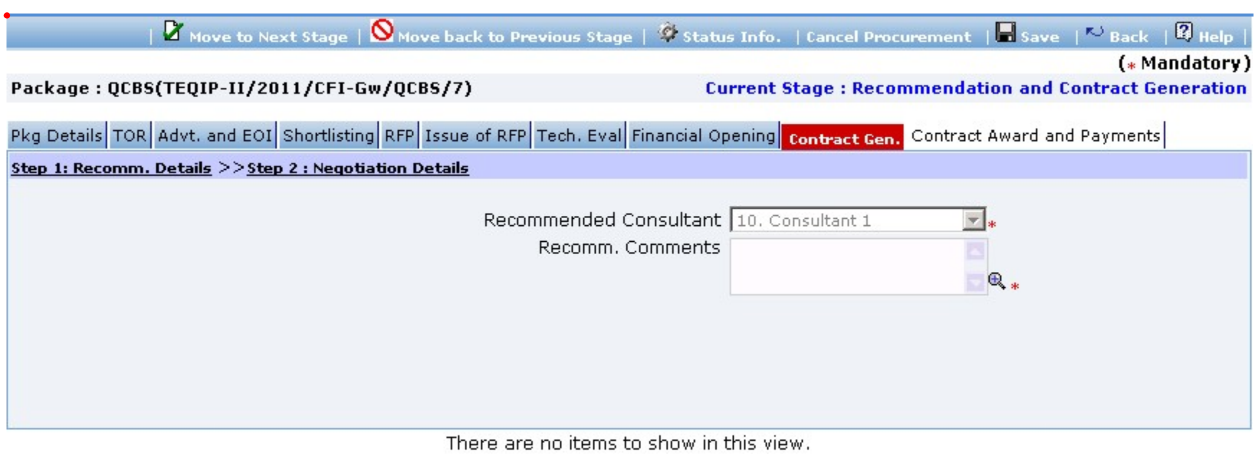
e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

91. On completion of 'Combined Evaluation' stage click on 'Move to Next Stage'. This will move the procurement to '**Recommendation and Contract Generation**' stage.

Recommendation and Contract Generation

In this stage recommendation of award meeting details and negotiation meeting details are recorded in the system. If negotiations are successful, contract will be generated.

'Contract Gen.' tab is selected by default.



92. As step 1 'Recomm. Details' fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Recommended Consultant	System will display name of the selected consultant. Highest scored consultants will be displayed initially. In subsequent stage if negotiations fail with the selected consultant, next highest scoring consultant will be displayed in this field.	Compulink Systems Ltd.
2	Recomm. Comments	Enter reason or comments recommending the consultant.	Consultant has vast experience in the developing procurement softwares.

93. Click 'Step 2: Negotiation Details' link in order to enter details about negotiation meeting with the selected consultant. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Date of Negotiation	Enter date on which negotiation meeting has been conducted Enter date in DD/MM/YYYY format or select date using calendar. This date should not be less than Financial Proposal Opening Date.	20/05/2011
2	Negotiation Comments	Enter details about negotiation meeting	
3	Is Negotiation Successful	Select Yes or No. If negotiations have been successful with the consultant, select 'Yes'. If negotiations have failed, select 'No'. Failed negotiation will be sent for approval to World Bank.	Yes

94. Click 'Save'.
95. Click 'Negotiation History' link to view history of negotiations for the procurement. A popup is seen;

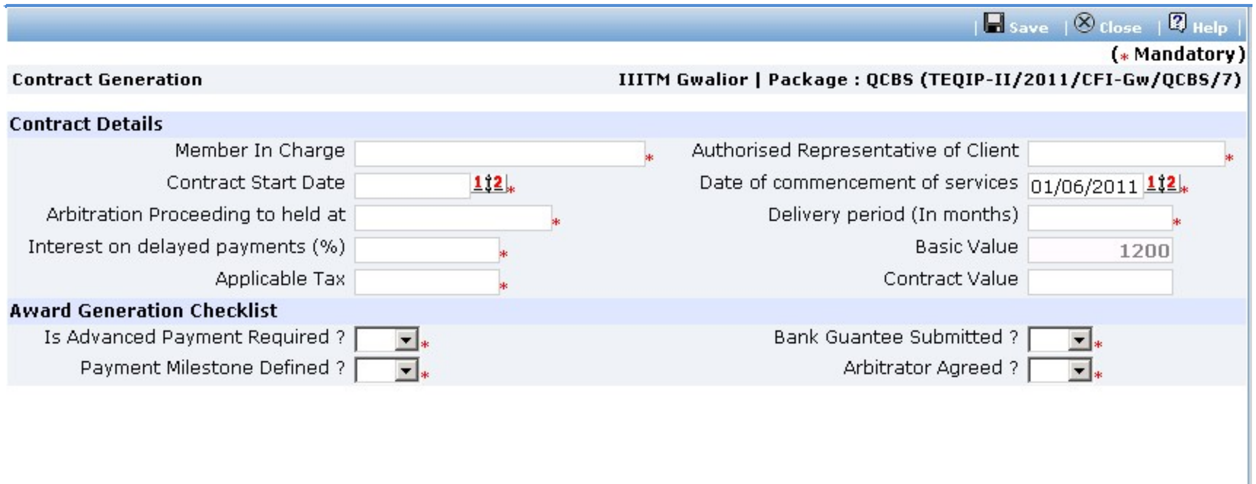
| Close | Help |

Negotiation Details

Previous Consultant	New Consultant	Nego. Comments	Negotiation Approval Date
10. Consultant 1	Consultant 5	Consultant wants to revisit his financial proposal.	26/05/2011

96. Click 'Save'.
97. History of negotiations will be displayed on the popup in descending order. Recent negotiation will be first in the list.
98. If negotiations have failed, the procurement will be sent for review ;
    a. Click 'Move to Next Stage' link.
        i) For state-funded institutions, the procurement will be sent to SPFU procurement coordinator. After SPFU's NOC, it will be sent to NPIU procurement coordinator for prior review to obtain NOC from World Bank.
        ii) For Centrally Funded Institutions, the procurement will be sent to NPIU to obtain NOC from World Bank.
    b. After necessary approvals are obtained, negotiations with consultant with next highest score can be performed. Repeat steps 93 to 98 for recording negotiations with the newly selected consultant.
    c. Repeat this process until negotiations are successful with the selected consultant.
99. On successful negotiations, next set of links will be displayed.

100. Click 'Step 3: Contract Details' link. A popup is shown;

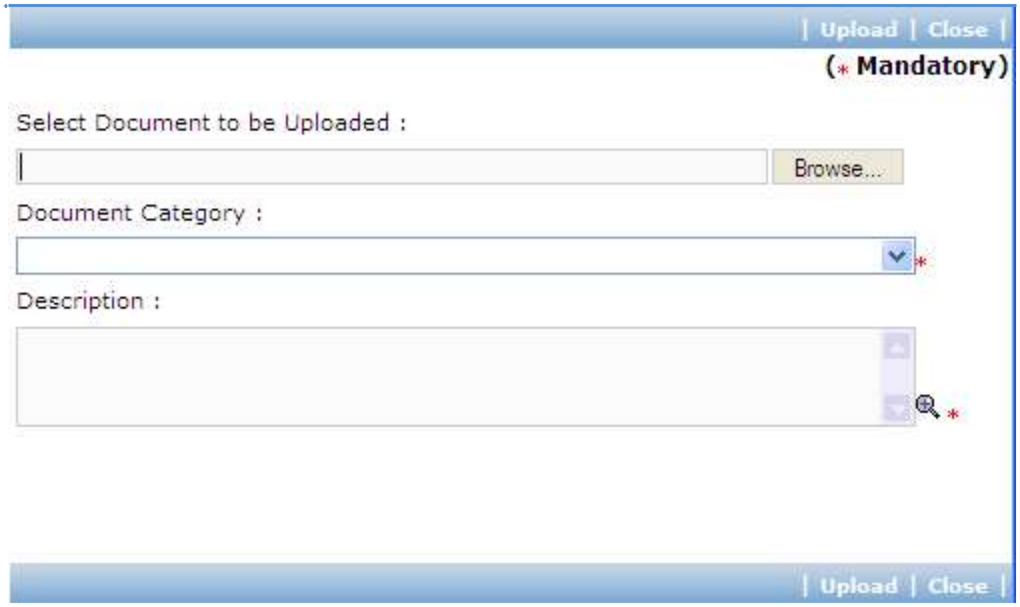


101. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
Contract Details			
1	Member in Charge	Enter name of the member at the consultant who will be in charge of this project	Mr. Yash Mehra
2	Authorized Representative of Client	Enter name of authorized representative of the client i.e. institution	Mr. Nikhil Pandit
3	Contract Start Date	Enter date on which Contract will be started Enter date in DD/MM/YYYY format or select date using calendar. This date should not be less than Date of Negotiations	05/06/2011
4	Date of commencement of services	Enter date on which Contract will be started Enter date in DD/MM/YYYY format or select date using calendar. This date should not be less than Contract Start Date	10/06/2011
5	Arbitrator Proceedings to be held at	Enter location at which arbitration will be held	New Delhi
6	Delivery Period (In months)	Enter period in months within which the service under this contract will be completed	20
7	Interest on delayed payments (%)	Enter percentage interest that will be charged to the institution in case of delayed payments.	2
8	Basic Value	This field will be read-only and auto-populated as value proposed by the consultant in his financial proposal and entered in the system at the time of Financial Proposal Opening stage.	1200

9	Applicable Tax	Enter tax applicable in Indian Rupees.	200
10	Contract Value	This field will be read-only and auto-calculated as Basic Value + Applicable Tax.	1400
Award Generation Checklist			
11	Is Advance Payment Required	Select Yes or No.	No
12	Bank Guarantee Submitted	Select Yes or No	No
13	Payment Milestones Defined	Select Yes or No	Yes
14	Arbitrator Agreed	Select Yes or No	Yes

102. Click 'Save'.
103. Contract Value will be displayed on the page. System will auto-calculate payment amount for all milestones of the procurement based on the Payment Amount % for the milestone.
104. Click "Step 4: Define Milestones" link. 'Milestones' subtab is shown in the lower section. The list of milestones defined for the procurement will be displayed. You can modify or delete existing milestones or add new milestones. Refer to stage "RFP Generation" for detailed steps.
105. Please ensure total of 'Payment Amount %' for all milestones is exactly 100.
106. Click 'Step 5: Generate Contract'. The contract document will be generated. Save the file locally and make necessary changes to the sections highlighted in yellow. Before generating the document, system validates the required information and prompts for missing information.
107. After completing changes to the locally saved draft contract document, click "Step 6: Upload Contract Form" link. 'Documents' subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.
108. Upload the draft contract document.
    a. Click 'Add' link, which is within the subtab. A popup will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR
3	Description	Enter more information about the uploaded document.	This is approved TOR.

c. Click 'Upload' to upload the document in the system.

d. Uploaded document will appear on the list shown in 'Documents' section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

109. You can also upload Minutes of negotiation meeting by following above steps.

110. On completion of 'Recommendation and Contract Generation' stage click on 'Move to Next Stage'.

111. If Prior review is applicable to the procurement, it will be sent for prior review. Please refer section 'Prior Review Scenarios' for details.

112. After necessary approvals are obtained, the procurement will move to the next stage '**Award of Contract and Payments**'.

Award of Contract and Payments

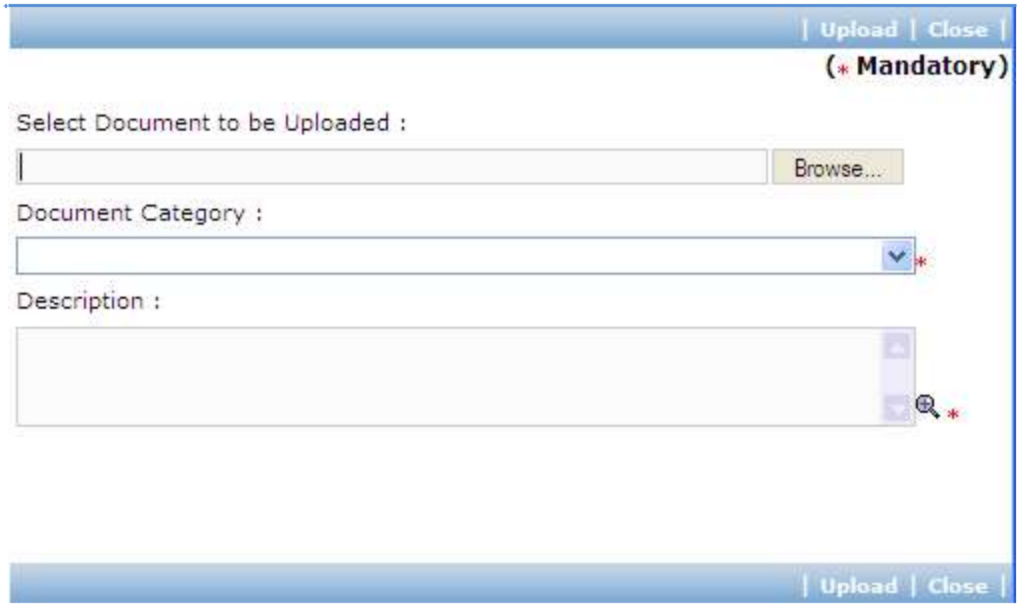
This is last stage of QCBS process. In this stage Contract sign date is entered and delivery dates are calculated. Actual Payment information is entered into the system against each payment milestone.

'Contract Award and Payments' tab is selected by default.

113. As step 1 'Enter Contract Sign Date' fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Contract Sign Date	Enter date on which Contract has been signed by both parties. Enter date in DD/MM/YYYY format or select date using calendar. This date should not be less than Contract Generation Date	10/06/2011

114. Click 'Save'.
115. Click 'Step 2: Print Prior Review Checklist'. Prior Review Checklist will be generated in MS Word format. Save the file locally. This checklist should be sent to the World Bank for review and obtaining WBR number.
116. Click "Step 3: Upload Signed Copy of Contract" link. 'Documents' subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.
117. Upload the contract document signed by both parties.
    a. Click 'Add' link, which is within the subtab. A popup will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR
3	Description	Enter more information about the uploaded document.	This is approved TOR.

c. Click 'Upload' to upload the document in the system.

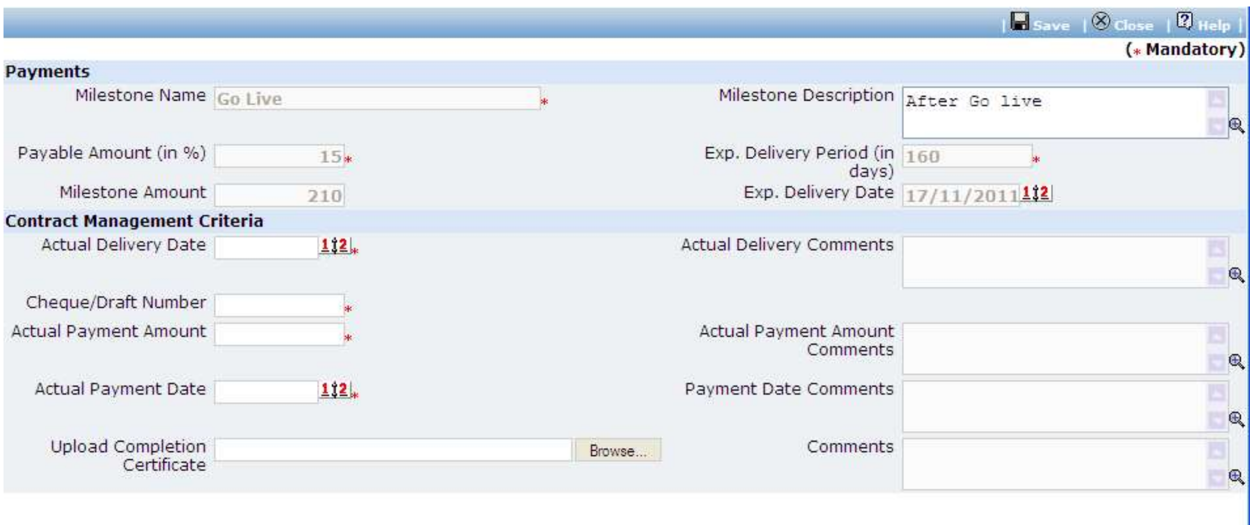
d. Uploaded document will appear on the list shown in 'Documents' section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

118. Click "Step 4: Track Milestones" link. 'Milestones' subtab is shown in the lower section.

Milestone Name	Exp. Delivery Period (in days)	Exp. Delivery Date	Payable Amount	Actual Payment Date
SRS	60	09/08/2011	210.00 (15%)	
Go Live	160	17/11/2011	210.00 (15%)	
Dev Milestone 2	120	08/10/2011	280.00 (20%)	
Dev Milestone	100	18/09/2011	420.00 (30%)	
BRD	30	10/07/2011	140.00 (10%)	
After UAT	140	28/10/2011	140.00 (10%)	

119. List of milestones is displayed in the subtab. System auto-calculates and displayed 'Expected Delivery Date' for all milestones based on Contract Sign Date.
120. Click link in 'Milestone Name' column to enter payment information for the milestone. A pop up will be seen



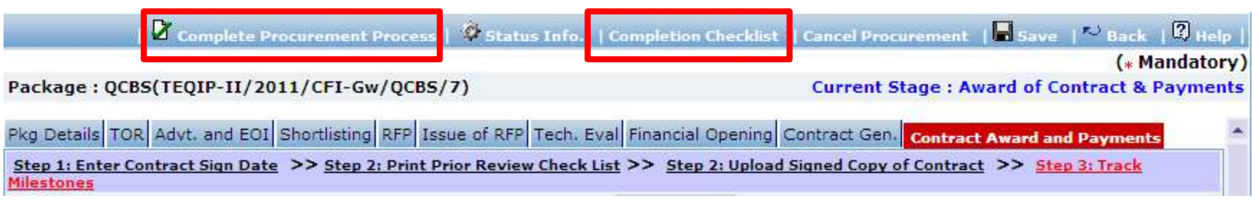
a. Expected Delivery Date and Milestone Amount will be auto-calculated by the system on Contract Sign Date and Contract Amount respectively.
b. Fill the fields on the page. Details of the fields are mentioned below;

c. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Actual Delivery Date	Enter date on which service/work against the milestone was completed and delivered. Enter date in DD/MM/YYYY format or select date using calendar. This date should not be less than contract sign date.	10/07/2011
2	Actual Delivery Comments	Enter comments related to actual delivery date, if Expected Delivery Date is not matching with Actual Delivery Date.	
3	Cheque/Draft Number	Enter Instrument number by which the payment was made i.e. Cheque or Draft Number	411004
4	Actual Payment Amount	Enter Actual amount paid to the consultant	120
5	Actual Payment Comments	Enter comments if Actual Amount paid doesn't match with the milestone amount	
6	Actual Payment date	Enter date on which actual payment was made. Enter date in DD/MM/YYYY format or select date using calendar.	20/07/2011
7	Payment Date Comments	Enter comments if any related to actual payment date	
8	Upload Completion Certificate	Browse and select completion certification document for the milestone specifying that the milestone has been completed.	
9	Comments	Enter any general comment, if any related to this milestone.	

d. Click 'Save'.

121. Repeat above steps to enter tracking information for all milestones of the procurement.
122. After payments against all milestones have been completed, click on 'Completion Checklist'.



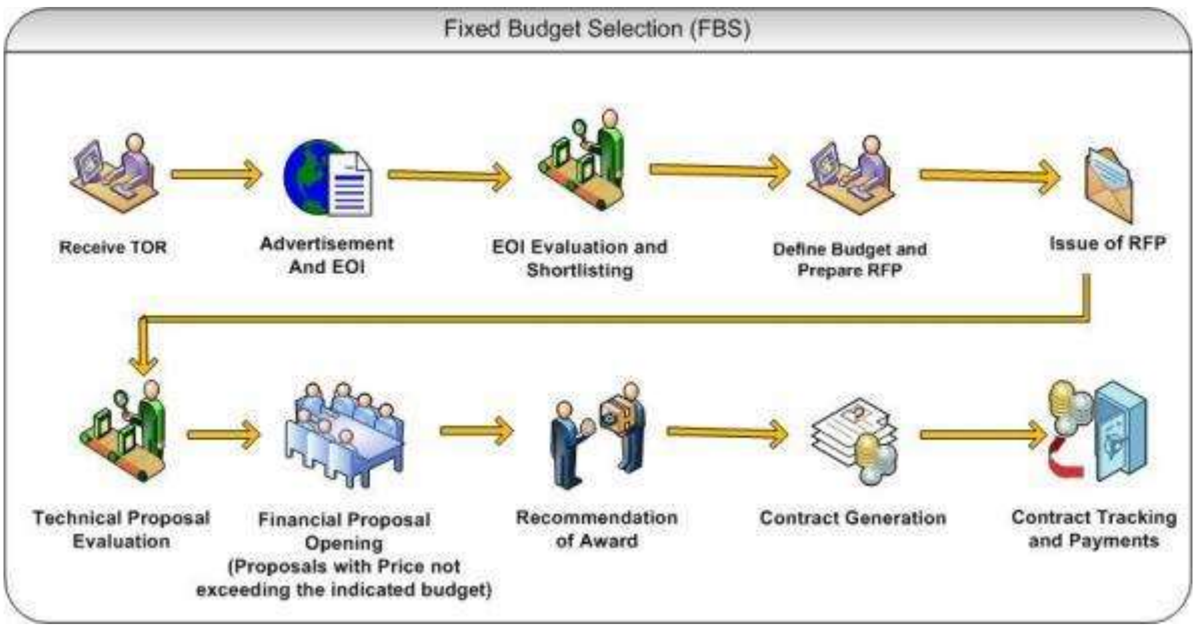
123. A popup will be seen. Enter responses to the process completion checklist.
124. Click link 'Complete Procurement Process' to mark the procurement as Complete.

Fixed Budget Selection (FBS)

Purpose

FBS method can be used for selecting providers for Research contracts, professional services, training, workshops and fellowships. This method is used when estimated budget for the procurement has been fixed. Consultants who has quoted price within the indicated budget are evaluated.

Process flow



Role(s)

- Procurement Coordinator (institution) – initiates and carries out the process of selection of providers.
- Procurement Coordinator (SPFU) – reviews the procurement if submitted to him for prior review.
- Procurement Coordinator (NPIU) – reviews the procurement if submitted to him for prior review.

Prerequisite

- Indicative Budget should be finalized.

- Other Prerequisites are similar to QCBS method. Please refer to section “Prerequisites’ under “Quality and Cost Based Selection”.

Prior Review Scenarios

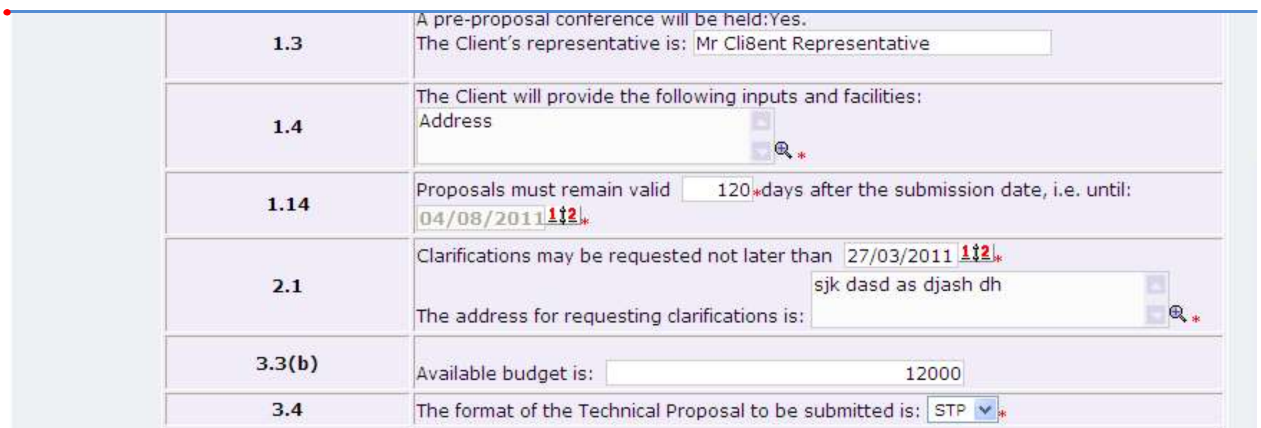
Prior Review Scenarios are similar to QCBS method. Please refer to section “Prior Review Scenarios’ under “Quality and Cost Based Selection”.

Process Details

1. Procurement using FBS method will follow same stages as QCBS method with few variations as mentioned below;

RFP Preparation

2. On “Step 2: Instruction to Consultants’ step page, available budget for the procurement should be specified in paragraph ‘3.3(b)’. In QCBS method, this paragraph has details about estimated duration of the contract in person months.



Combined Evaluation

3. Financial proposal Evaluation will be carried only for proposals which have quoted price within indicated budget. After “Step 3 Enter Financial Proposal Opening Data”, Proposals exceeding the indicated budget shall be marked as technically non-responsive.

1. A Consultant who has obtained the highest technical score shall be selected and displayed as recommended consultant.

Least Cost Selection (LCS)

Purpose

LCS method can be used for selecting Consultants for assignments of a standard routine nature like audits, engineering design of non-complex works etc. Consultant Firm which is technically responsive and has quoted lowest price of all consultants is selected.

Process flow

Role(s)

- Procurement Coordinator (institution) – initiates and carries out the process of selection of providers.
- Procurement Coordinator (SPFU) – reviews the procurement if submitted to him for prior review.
- Procurement Coordinator (NPIU) – reviews the procurement if submitted to him for prior review.

Prerequisite

- Prerequisites are similar to QCBS method. Please refer to section "Prerequisites' under "Quality and Cost Based Selection".

Prior Review Scenarios

Prior Review Scenarios are similar to QCBS method. Please refer to section "Prior Review Scenarios' under "Quality and Cost Based Selection".

Process Details

1. Procurement using LCS method will follow same stages as QCBS method with few variations as mentioned below;

Combined Evaluation

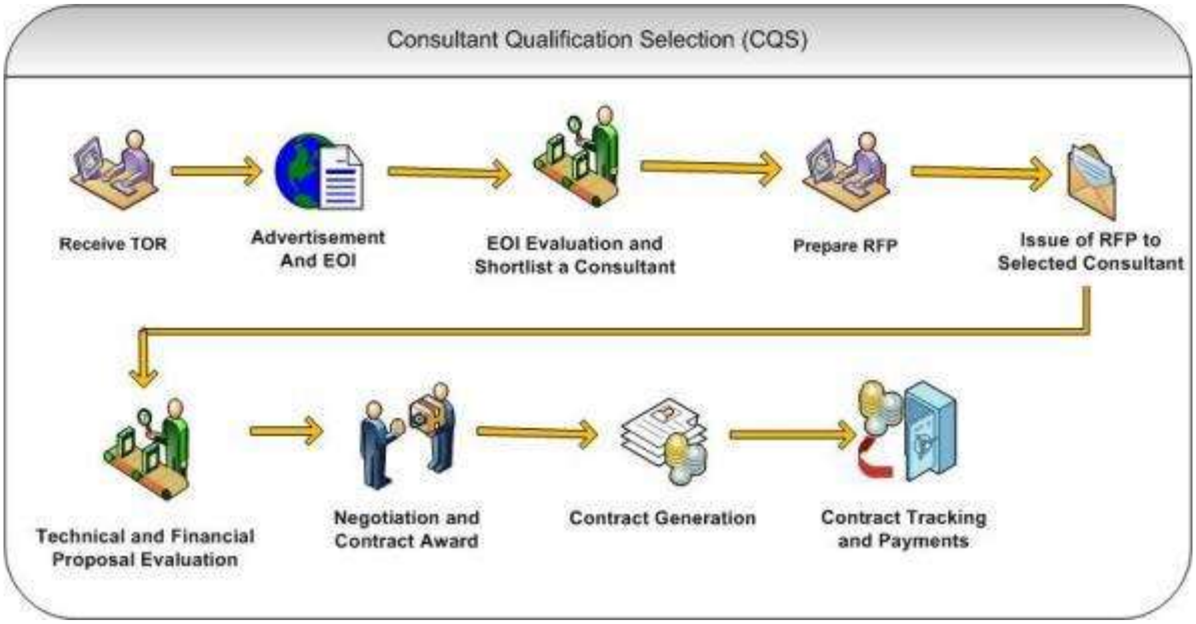
2. System doesn't perform combined evaluation. A Consultant who has scored "minimum" qualifying technical score (% specified in RFP document) and has lowest quoted price shall be selected and displayed as recommended consultant.

Consultant Qualification Selection (CQS)

Purpose

CQS method can be used for selecting Consultants for assignments of a standard routine nature like audits, engineering design of non-complex works etc. Consultant Firm which is technically responsive and has quoted lowest price of all consultants is selected.

Process flow



Role(s)

- Procurement Coordinator (institution) – initiates and carries out the process of selection of providers.
- Procurement Coordinator (SPFU) – reviews the procurement if submitted to him for prior review.
- Procurement Coordinator (NPIU) – reviews the procurement if submitted to him for prior review.

Prerequisite

- Prerequisites are similar to QCBS method. Please refer to section "Prerequisites' under "Quality and Cost Based Selection".

Prior Review Scenarios

- For State-sponsored institutions
  - If estimated cost is between 10,000 US$ and 50,000 US$, then the procurement will be sent to respective SPFU procurement coordinator for prior review.
  - If estimated cost is between 50,000 US$ and 2,00,000 US$, then the procurement will be sent to SPFU procurement coordinator. When he gives NOC, it will be sent to NPIU procurement coordinator for prior review.

    - If estimated cost is 2,00,000 US$ and above, then the procurement will be submitted to SPFU procurement coordinator. When he gives NOC, it will be sent to NPIU procurement Coordinator to obtain World Bank NOC.
- For Centrally Funded Institutions,
    - If estimated cost is between 10,000 US$ and 2,00,000 US$, then the procurement will be sent to NPIU procurement coordinator for prior review.
    - If estimated cost is 2,00,000 US$ and above, then the procurement will be submitted to NPIU procurement Coordinator to obtain World Bank NOC.

Process Details

1. Procurement using CQS method will follow same stages as QCBS method with few variations as mentioned below;

EOI Opening & Shortlisting of Consultants

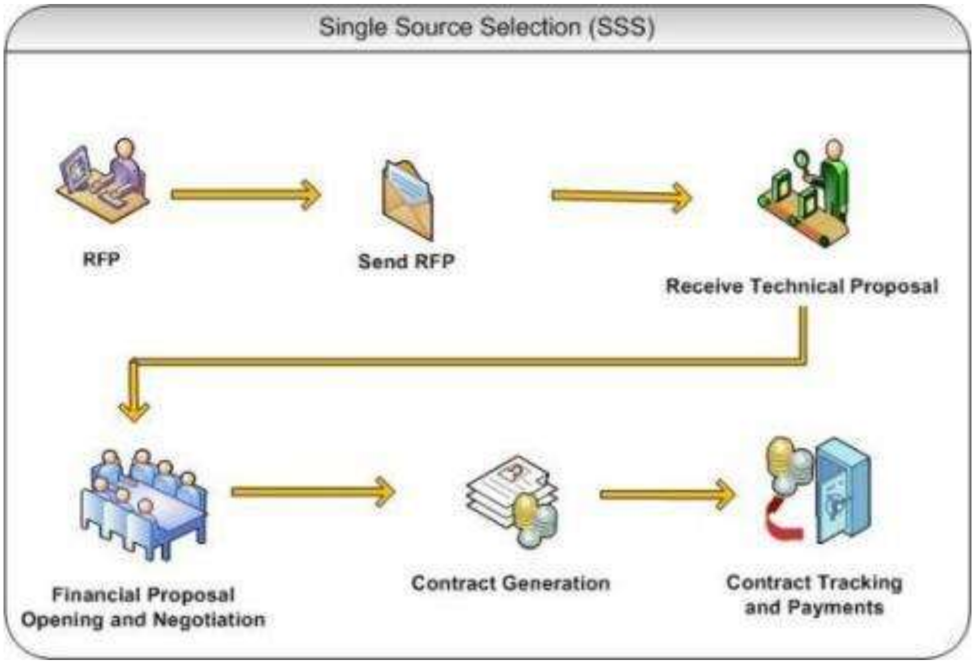
2. On "Step 4: Shortlisting of Consultants', only one consultant will shortlisted and will be issued RFP.
3. Technical and Financial Evaluation will be done for only one consultant.

Single Source Selection (SSS)

Purpose

SSS method can be used for selecting consulting firms only if it presents a clear advantage over competition due to various reasons like continuation of same work, Rapid selection is necessary, small assignment, or the consultant has experience of exceptional significance of the assignment. As this is not competitive method of selection, technical or financial evaluation will not be carried out.

Process flow



Role(s)

- Procurement Coordinator (institution) – initiates and carries out the process of selection of providers.
- Procurement Coordinator (SPFU) – reviews the procurement if submitted to him for prior review.
- Procurement Coordinator (NPIU) – reviews the procurement if submitted to him for prior review.

Prerequisite

- Justification for selection of the consultant should be documented and duly signed.
- Other Prerequisites are similar to QCBS method. Please refer to section "Prerequisites' under "Quality and Cost Based Selection".

Prior Review Scenarios

- For State-sponsored institutions
  - The procurement will be submitted to SPFU procurement coordinator. When he gives NOC, it will be sent to NPIU procurement Coordinator to obtain World Bank NOC.
- For Centrally Funded Institutions,

- The procurement will be submitted to NPIU procurement Coordinator to obtain World Bank NOC.

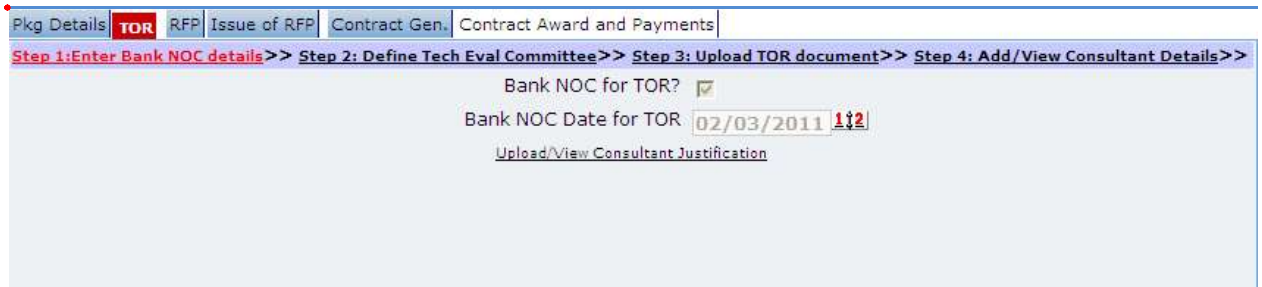
Process Details

1. Procurement using SSS method will go through following stages;

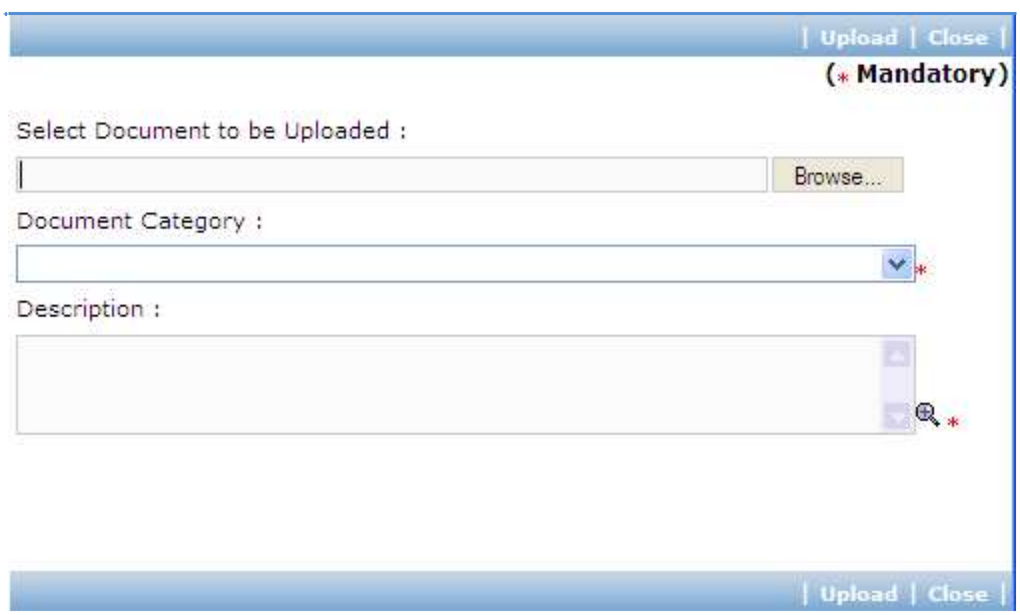
Generation of TOR

The steps on this stage are similar to QCBS except few variations;

2. On "Step 1: Enter Bank NOC Details', 'Upload/View Consultant Justification' link will be shown.



3. Click the link. 'Documents' subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.
4. Upload the justification document justifying selection of the consultant.
   a. Click 'Add' link, which is within the subtab. A popup will be seen



   b. Fill the fields on the page. Details of the fields are mentioned below;

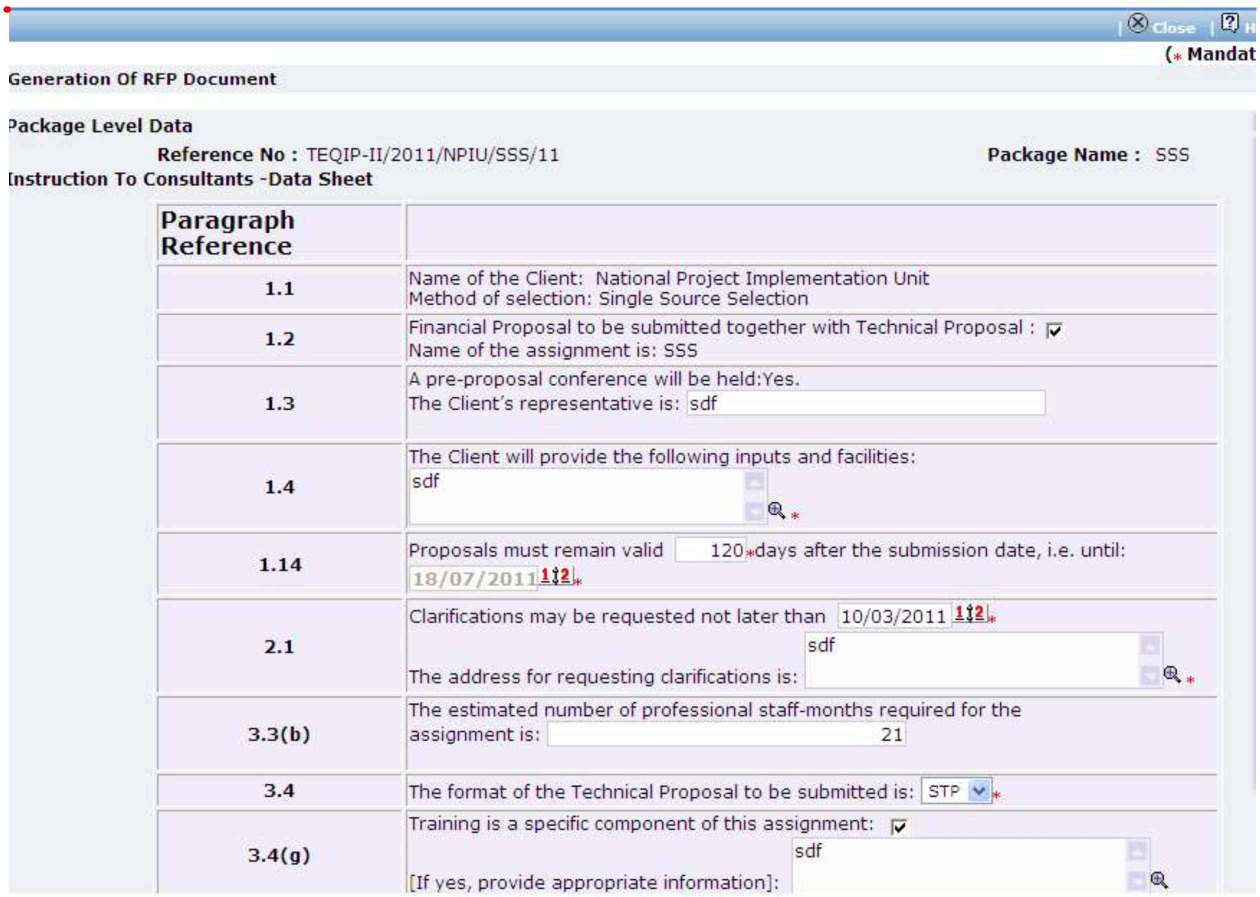
Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR
3	Description	Enter more information about the uploaded document.	This is approved TOR.

c. Click ‘Upload’ to upload the document in the system.

d. Uploaded document will appear on the list shown in ‘Documents’ section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

RFP Preparation



The steps on this stage are similar to QCBS except few variations;

5. On "Step 2: Instruction to Consultants" popup page, few fields are not displayed
    - Min. Score for Technical Proposal
    - Weightage for technical proposal
    - Weightage for financial proposal

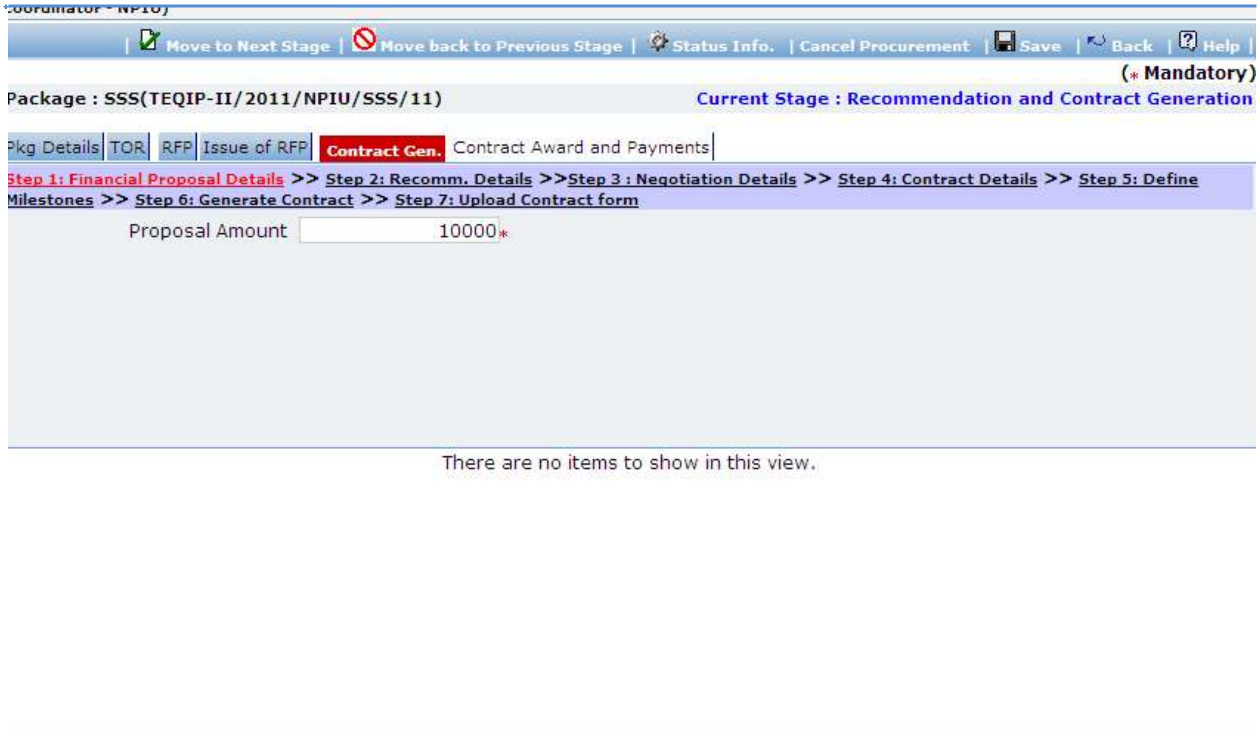
Issue of RFP

6. The steps on this stage are similar to QCBS except that RFP will be issued to only one consultant in case of SSS.

Recommendation and Contract Generation

In this stage recommendation of award meeting details and negotiation meeting details are recorded in the system. If negotiations are successful, contract will be generated.

'Contract Gen.' tab is selected by default.



7. On 'Step 1: Financial Proposal Details', fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Proposal Amount	Enter amount quoted by the consultant in the financial proposal. This value will be considered as basic value at the time of contract generation.	12000

8. Click 'Save'.
9. All other steps on this stage are similar to QCBS procurement method.

Award of Contract and Payments

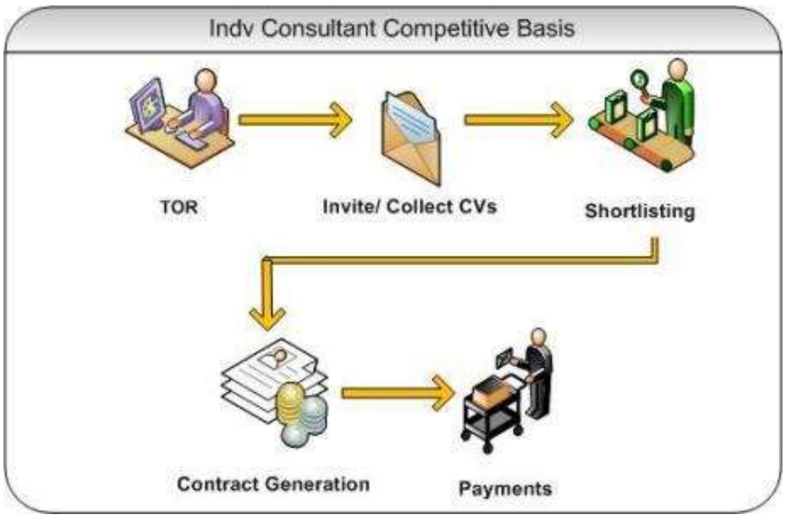
10. The steps on this stage are similar to QCBS procurement method.

Individual Consultants – Competitive Method

Purpose

This method is used for obtain services from individual consultant using competitive bidding.

Process flow



Role(s)

- Procurement Coordinator (institution) – initiates and carries out the process of selection of providers.

Prerequisite

- Financial Sanction should be obtained for procurement of the service.
- TOR (Terms of References) should be prepared and reviewed by reviewing authorities at the Institution.
- Technical Review Committee should be formed for this procurement. This committee will review and evaluate technical proposals received by the firms based on the evaluation criteria given in the RFP document.

Process Details

The first stage is "TOR"

TOR

In this stage activities related to TOR approval are performed. Technical Evaluation Committee will be defined in this stage. This committee will be involved in evaluation of technical proposals submitted by the consultants.

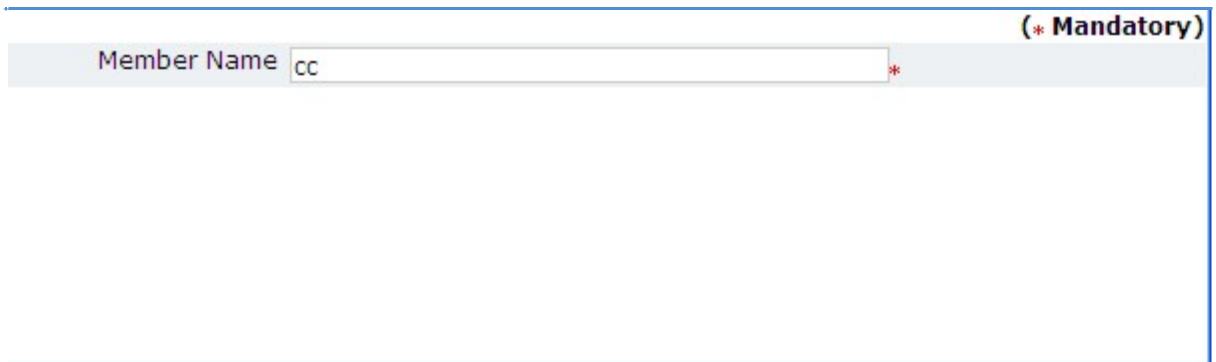
'Generation of TOR' tab will be selected by default.

1. Fill following details on the page related to World Bank NOC for TOR.

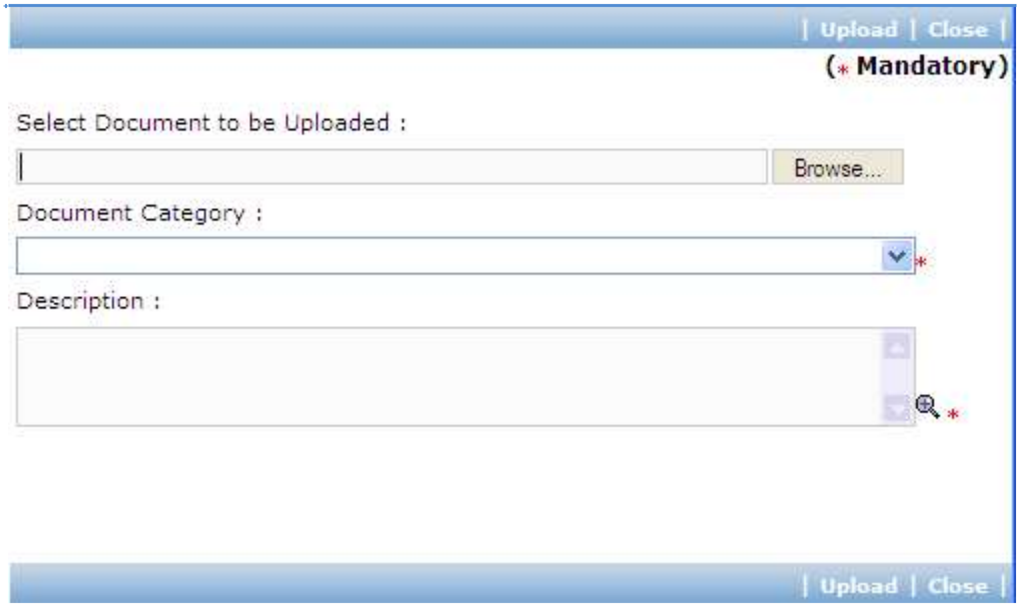
Sr. No.	Field Name	Field Description	Sample Data
1	Bank NOC for TOR	Enter the checkbox if World Bank NOC has been obtained for the TOR This field is not mandatory.	
2	Bank NOC Date for TOR	Enter date in DD/MM/YYYY format or select date using calendar. You cannot enter past Date.	

		Please enter date on which World Bank has given its NOC for the TOR.	

2. Click ‘Save’.
3. Click “Step 2: Define Tech Evaluation Committee” link. ‘Technical Evaluation Committee’ subtab is shown in the lower section.
4. Define Technical Evaluation Committee. Defining Technical Evaluation Committee members is mandatory.
    a. To add a Technical Evaluation Committee member, click on the ‘Add’ link, which is within the subtab. A popup will be seen



    b. It has only one field – Member Name. Fill the name of member in the field.
    c. Click ‘Save’
    d. To add another member, repeat steps a to c.
5. Click “Step 3: Upload TOR Document” link. ‘Documents’ subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.
6. Upload finalized and approved TOR Document.
    a. Click ‘Add’ link, which is within the subtab. A popup will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR
3	Description	Enter more information about the uploaded document.	This is approved TOR.

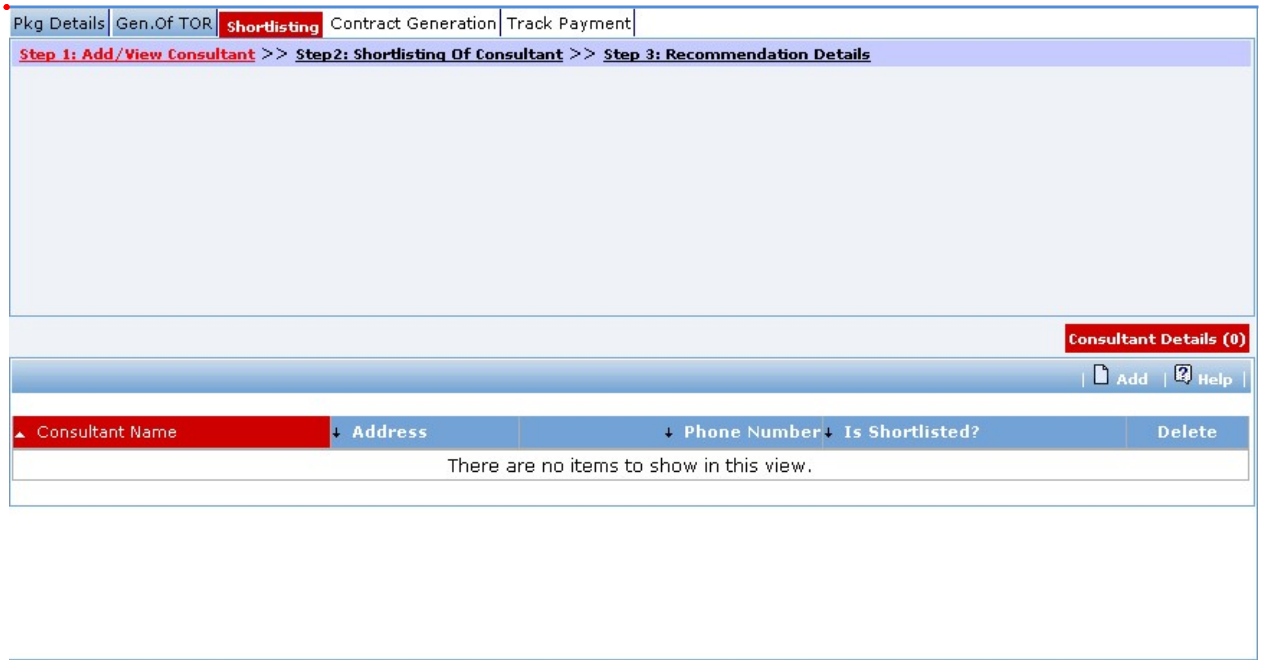
c. Click 'Upload' to upload the document in the system.

7. After the document is uploaded, it will appear on the list shown in 'Documents' section.
8. You can select and delete any document that has been uploaded in current stage of the procurement. For e.g. if you are in 'TOR Generation' stage, you can delete documents that you have uploaded in this stage. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.
9. On completion of 'Generation of TOR' stage click on 'Move to Next Stage'. This will move the procurement to '**Shortlisting**' stage.

Shortlisting

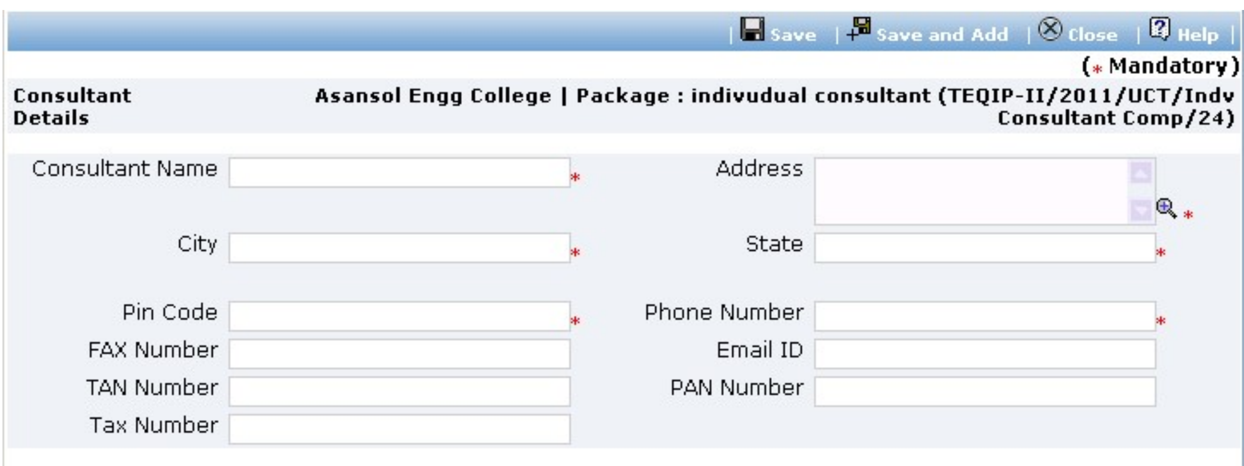
In this stage short-listing of firms will be performed.

'Shortlisting' tab is selected by default.



10. Click "Step 1: Add/View Consultants" link. 'Consultant Details' subtab is shown in the lower section.

a. Click 'Add', which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

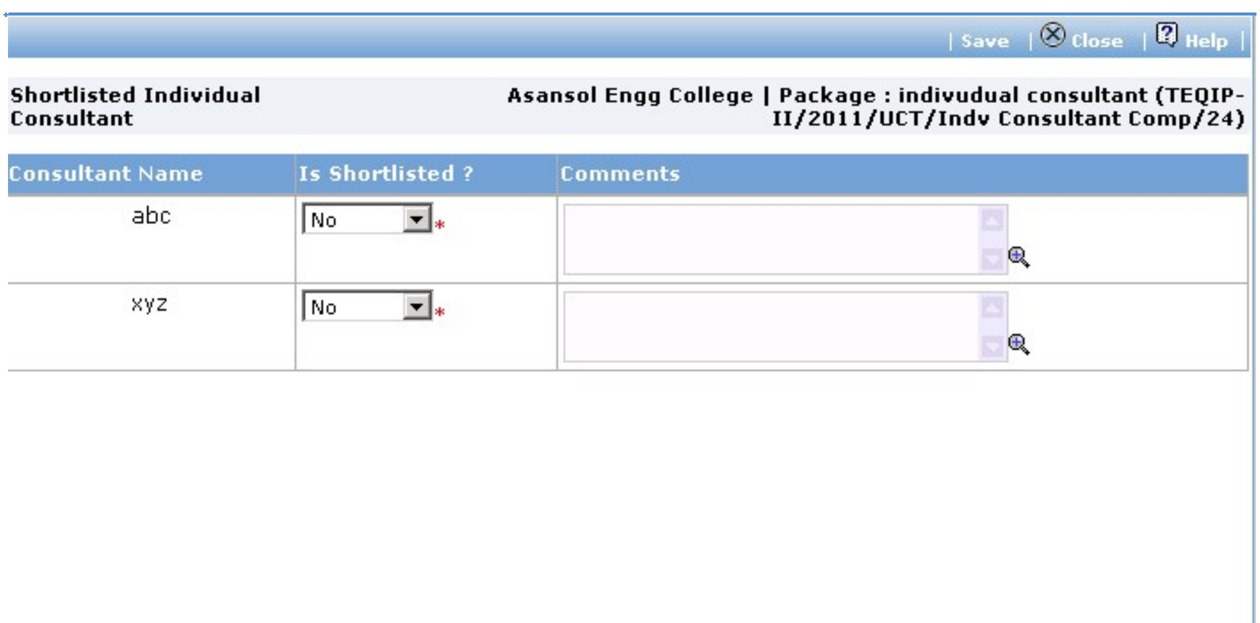
Sr. No.	Field Name	Field Description	Sample Data
1	Consultant Name	Enter Name of the consultant. Consultant can also be searched using 'Select Consultant from PMSS Database' link. Click on this link will display the existing list of consultants, if any. Once the list is displayed, click on the consultant's name. This will auto populated the selected consultant's data. In order to search additional consultants within the state or city use the filters provided on the page.	ABC Consultants

2	Address	Enter the address of the Consultant	STI Towers, Unit# 141/38, Campus 29. RMZ Millenia Business Park. 881, Dr. MGR Road
3	City	Enter the city of the Consultant	Pune
4	State	Enter the state of the Consultant	Maharashtra
5	Pin Code	Enter the Pin Code of the Consultant	411232
6	Phone Number	Enter the Phone Number of the Consultant. To enter more than one number use comma (,) as a separator.	26422689
7	Fax Number	Enter the Fax Number of the Consultant.	26422680
8	Email ID	Enter the Email ID of the Consultant	ftti@efttil.com
9	PAN Number	Enter the PAN Number of the Consultant	ANS44874
10	TAN Number	Enter the TAN Number of the Consultant	
11	Tax Number	Enter the TAX Number of the Consultant	

c. Click 'Save'.

d. To add another consultant, repeat steps a to c.

11. Click "Step 2: Shortlisting of Consultants" link. A popup will be seen



a. Fill fields mentioned below for each consultant;

Sr. No.	Field Name	Field Description	Sample Data
1	Is Shortlisted	Select Yes or No.	No

		Select Yes if the consultant has been shortlisted Select No if the consultant has not been shortlisted	
2	Comments	Enter reasons for short listing or rejection of the consultant.	Not adequate project experience

b. Click ‘Save’.

c. Click ‘Close’ to close the popup window.

12. Click “Step 3: Recommendation Details” link. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	L1 Consultant	Select lowest price consultant i.e. L1 consultant who should be awarded this contract	ABC Ltd.
2	Recommendation Comments	Enter comments recommending the selected consultant	Vast experience in the domain

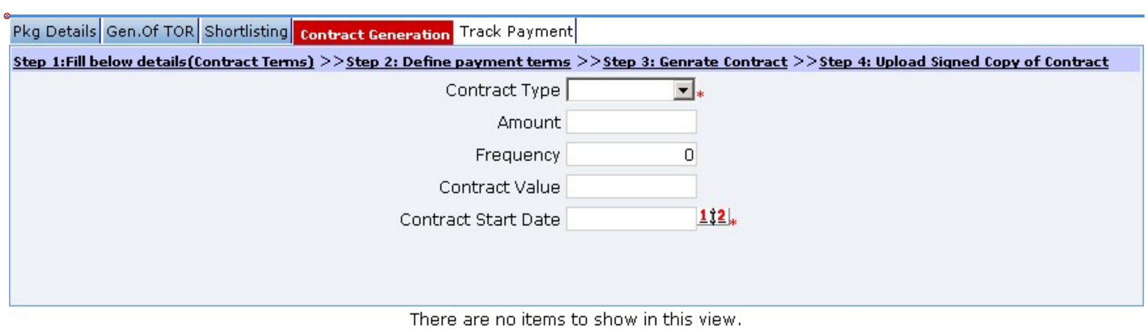
13. Click ‘Save’

14. On completion of ‘Shortlisting’ stage click on ‘Move to Next Stage’. This will move the procurement to ‘**Contract Generation**’ stage.

Contract Generation

In this stage the contract terms will be defined and contract will be generated.

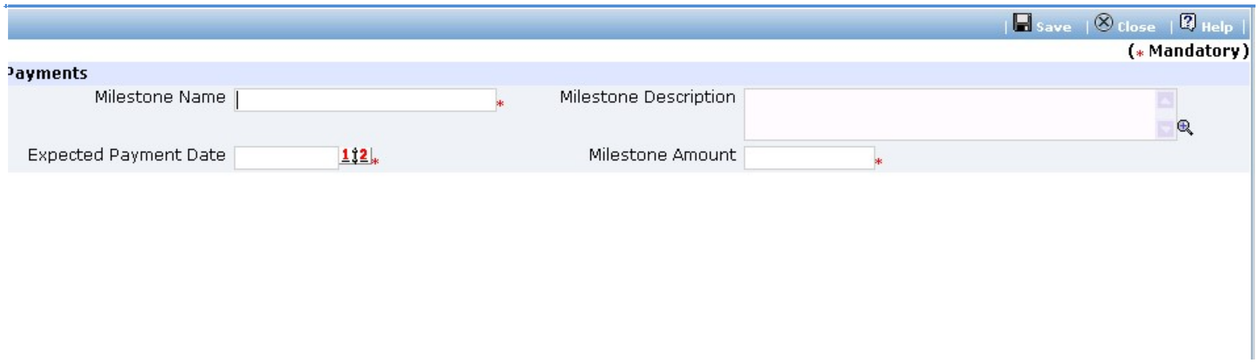
‘Contract’ tab is selected by default.



15. On "Step 1: Fill below details (Contract Details), fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Contract Type	Select type of contract - Lumpsum or Time based	Lumpsum
For Lumpsum Type			
2	Amount	Enter value quoted by the shortlisted consultant	12000
3	Frequency	Enter no. of intervals at which payment will be made to the consultant	4
4	Contract Value	System will auto-populate 'Amount' field value in this field	12000
5	Contract Start Date	Enter date on which contract will be started Enter date in DD/MM/YYYY format or select date using calendar.	01/04/2011
For Time based Type			
6	Billing Cycle	Select billing cycle for the contract – Daily or Monthly.	Daily
7	Fees	Enter Fees per day or month depending on billing cycle. If Billing Cycle is 'Daily', fees per day should be entered. If Billing Cycle is 'Monthly', fees per month should be entered.	100
8	Total Contract Period	Enter period of the contract in days or month depending on billing cycle. If Billing Cycle is 'Daily', Contract Period should be entered in days. If Billing Cycle is 'Monthly', Contract Period should be entered in months.	20
9	Contract Value	System will auto-populate 'Amount' field value in this field	2000
10	Contract Start Date	Enter date on which contract will be started Enter date in DD/MM/YYYY format or select date using calendar.	01/04/2011

16. Click 'Save'
17. Click "Step 2: Define Payment Terms" link. 'Milestones' subtab is shown in the lower section.
    a. To add a milestone/payment term, Click 'Add' which is within the subtab. A pop up will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

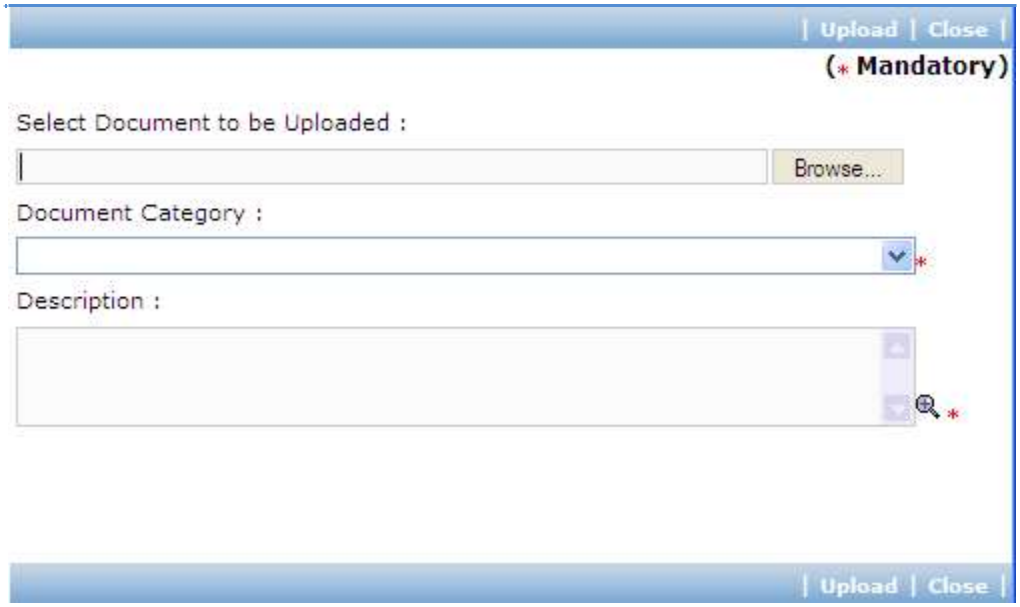
Sr. No.	Field Name	Field Description	Sample Data
1	Milestone Name	Enter name of the milestone	BRD Signoff
2	Milestone Description	Enter description for the milestone	After BRD signoff
3	Expected Payment Date	Enter expected payment date for this milestone Enter date in DD/MM/YYYY format or select date using calendar.	30/04/2011
4	Milestone Amount	Enter milestone amount	1200

c. Click 'Save'

d. To add new payment terms, repeat steps a to c.

18. Please ensure total of 'Payment Amount %' for all milestones is exactly 100.
19. Click 'Step 3: Generate Contract'. The contract document will be generated. Save the file locally and make necessary changes to the sections highlighted in yellow. Before generating the document, system validates the required information and prompts for missing information.
20. After completing changes to the locally saved draft contract document, click "Step 4: Upload Signed Copy of Contract" link. 'Documents' subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.
21. Upload the signed contract document.

a. Click 'Add' link, which is within the subtab. A popup will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR
3	Description	Enter more information about the uploaded document.	This is approved TOR.

c. Click ‘Upload’ to upload the document in the system.

d. Uploaded document will appear on the list shown in ‘Documents’ section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select ‘Delete’ checkbox against the document and click ‘Delete’ link.

22. On completion of ‘Contract Generation’ stage click on ‘Move to Next Stage’. This will move the procurement to ‘**Track Payment**’ stage.

Track Payment

This is last stage of the process. In this stage information about actual Payment will be entered into the system.

'Track Payment' tab is selected by default.

23. Click "Step 1: Track Payment" link. 'Milestones' subtab is shown in the lower section. List of milestones is displayed in the subtab.
24. Click link in 'Milestone Name' column to enter payment information for the milestone. A pop up will be seen

a. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Cheque/Draft Number	Enter Instrument number by which the payment was made i.e. Cheque or Draft Number	411004
2	Actual Payment date	Enter date on which actual payment was made. Enter date in DD/MM/YYYY format or select date using calendar.	20/07/2011
3	Payment Date Comments	Enter comments if any related to actual payment date	
4	Actual Payment Amount	Enter Actual amount paid to the consultant	120
5	Actual Payment Comments	Enter comments if Actual Amount paid doesn't match with the milestone amount	

b. Click 'Save'.

25. Repeat above steps to enter tracking information for all milestones of the procurement.
26. After payments against all milestones have been completed, click on 'Complete Procurement Process' to mark the procurement as Complete.

Individual Consultants – SSS

Purpose

This method is used for obtain services from individual consultant using Single Source Selection.

Process flow

Role(s)

- Procurement Coordinator (institution) – initiates and carries out the process of selection of providers.

Prerequisite

- Justification for the consultant should be prepared and duly signed.
- Other Prerequisites are similar to Individual Consultant – Competitive method.

Process Details

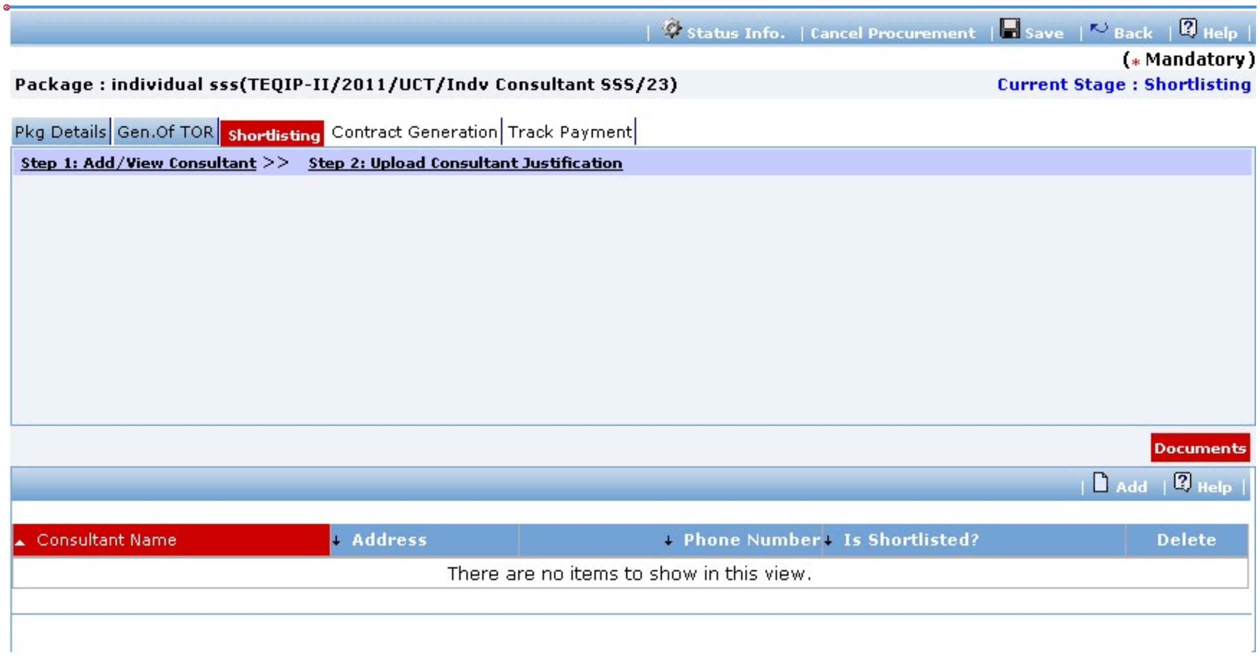
TOR

1. The steps on this stage are similar to Individual Consultant – Competitive method.

Shortlisting

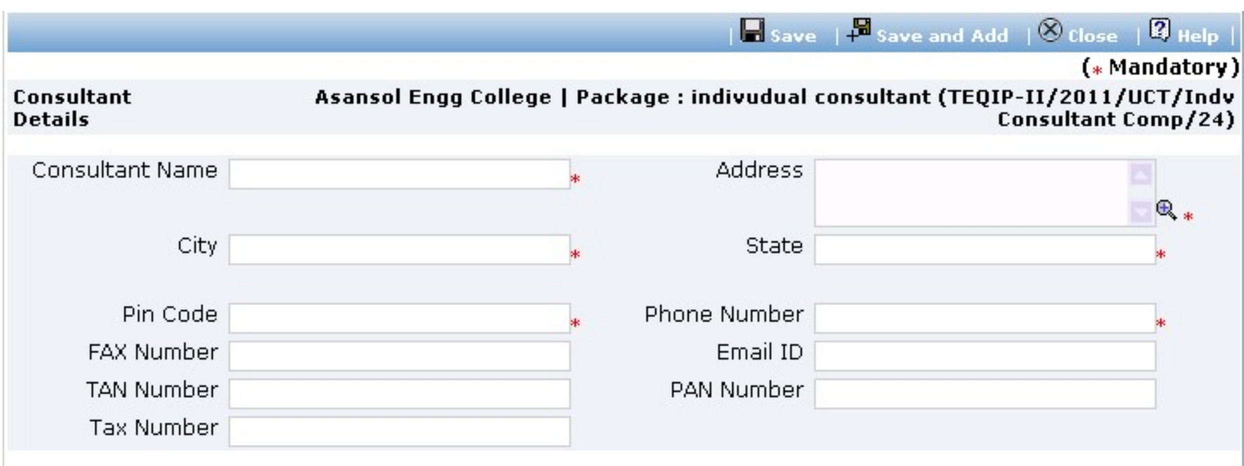
In SSS method, there will be no short-listing process. Instead, justification for selection of consultant will be uploaded in the system.

'Shortlisting' tab is selected by default.



2. Click "Step 1: Add/View Consultants" link. Only one consultant can be uploaded. 'Consultant Details' subtab is shown in the lower section.

   a. Click 'Add', which is within the subtab. A pop up will be seen



   b. Fill the fields on the page. Details of the fields are mentioned below;

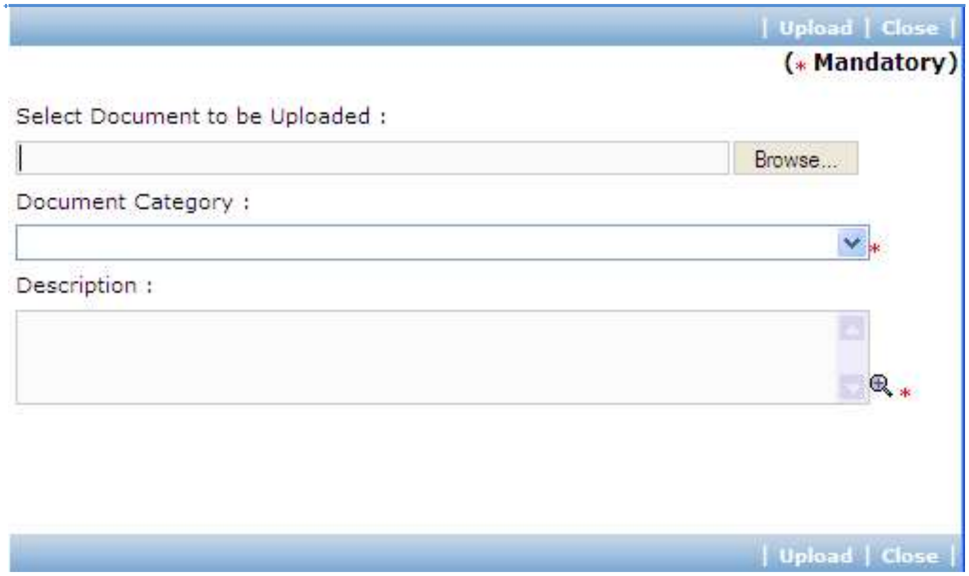
Sr. No.	Field Name	Field Description	Sample Data
1	Consultant Name	Enter Name of the consultant. Consultant can also be searched using 'Select Consultant from PMSS Database' link. Click on this link will display the existing list of consultants, if	ABC Consultants

		any. Once the list is displayed, click on the consultant's name. This will auto populated the selected consultant's data. In order to search additional consultants within the state or city use the filters provided on the page.	
2	Address	Enter the address of the Consultant	STI Towers, Unit# 141/38, Campus 29. RMZ Millenia Business Park. 881, Dr. MGR Road
3	City	Enter the city of the Consultant	Pune
4	State	Enter the state of the Consultant	Maharashtra
5	Pin Code	Enter the Pin Code of the Consultant	411232
6	Phone Number	Enter the Phone Number of the Consultant. To enter more than one number use comma (,) as a separator.	26422689
7	Fax Number	Enter the Fax Number of the Consultant.	26422680
8	Email ID	Enter the Email ID of the Consultant	ftti@efttil.com
9	PAN Number	Enter the PAN Number of the Consultant	ANS44874
10	TAN Number	Enter the TAN Number of the Consultant	
11	Tax Number	Enter the TAX Number of the Consultant	

c. Click 'Save'.

3. Click "Step 4: Upload Consultant Justification" link. 'Documents' subtab is shown in the lower section. It contains all documents uploaded in the system at various stages of the procurement.
4. Upload justification document explaining selection of the consultant for the contract.

a. Click 'Add' link, which is within the subtab. A popup will be seen



b. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Document to be uploaded	Browse the document that you want to upload.	
2	Document Category	Select the appropriate document category.	TOR
3	Description	Enter more information about the uploaded document.	This is approved TOR.

c. Click 'Upload' to upload the document in the system.

d. Uploaded document will appear on the list shown in 'Documents' section.

e. User can select and delete the document that has been uploaded in current stage of the procurement. To delete a document, select 'Delete' checkbox against the document and click 'Delete' link.

5. On completion of 'Shortlisting' stage click on 'Move to Next Stage'. This will move the procurement to '**Contract Generation**' stage.

Contract Generation

6. The steps on this stage are similar to Individual Consultant – Competitive method.

Track Payment

7. The steps on this stage are similar to Individual Consultant – Competitive method.

Chapter

8

REQUEST/ QUERIES

Request/ queries

Request/ Queries

Purpose

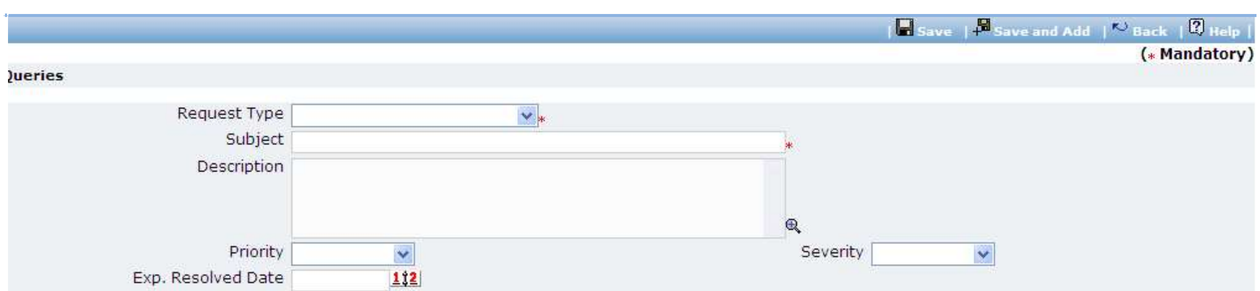
This module is an interface used for answering the queries/ requests raised by the users.

Role(s)

- Procurement Coordinator (institution) – submits a request.
- Procurement Coordinator (SPFU) – reviews the request and resolves the request/query.
- Procurement Coordinator (NPIU) – reviews the request and resolves the request/query.

Process Details

1. Click 'Add' link to add new request. A popup will be seen;



a. Fill the fields on the page. Details of the fields are mentioned below;

Sr. No.	Field Name	Field Description	Sample Data
1	Request Type	Select Request Type – Process Related or Technical	Technical

		Select ‘Process Related’ if the query is related to World Bank procurement process guidelines or procurement manual. Select ‘Technical’ if the query is related to the PMSS Application.	
2	Subject	Enter some brief description about the query as subject.	Unable to add new consultant
3	Description	Enter detailed description of the query. In case of technical query, you should provide steps to the problem or functionality.	
4	Priority	Select severity – High, Medium or Low depending on your priority or urgency to get the solution.	High
5	Severity	Select – Critical, Major or Minor depending on criticality of the functionality	Critical
6	Exp. Resolution Date	Enter date by which the query should be resolved. Enter date in DD/MM/YYYY format or select date using calendar.	23/03/2011

b. Click ‘Save’

2. User will be able to add attachment using the ‘Add Attachment’ link, if required.
3. Email will be sent to all the users of NPIU and SPFU (incase of State-sponsored Institutions)
4. All the users of NPIU (and SPFU incase of state sponsored institutions) will be able to see the request in the Request/ Queries module.
5. User can click on the request to see the details of the request.

6. User can provide his/ her comments (resolution) using the discussion thread or change the status.

7. Click 'Save' if you change the status.
8. Email will be sent to the requestor.
9. The requestor can click on the request and see the comments (resolution) in discussion thread.
10. If the user is satisfied with the resolution, he/ she can mark the status as 'Closed' else the user can change the status to 'Re-open' and mention the comments (reason for re-opening) in the discussion thread.
11. All the discussion threads will be recorded with the timestamp.

Chapter
9

PMSS-MIS

User Guide – MIS

PMSS-MIS

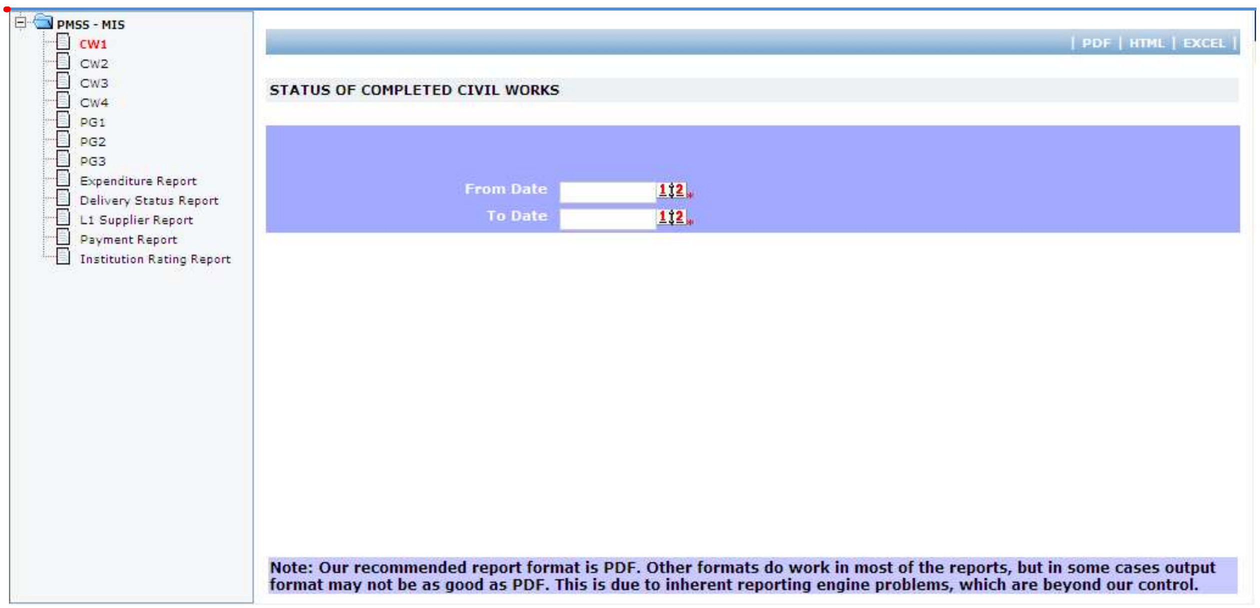
Purpose

This module will be used to print reports.

Role(s)

- Procurement Coordinator

Process Details



1. Click on a link for the report that you want generate seen in left side navigation bar.
2. Specify the period for which the report should be generated. For e.g. for generating a report for March, 2010, enter '01/03/2010' as 'From Date' and '31/03/2010' as 'To Date'.
3. Click on the format in which the report should be generated. Report can be generated in any of the three formats PFD, HTML and Excel.

Procurement Management Support System – PMSS

Thank You