

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-II 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-II 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 SPFUs (State Project Facilitation Unit) and NPIU (National Project Implementation Unit) for procurement as well as monitoring activities.



CONFIGURATION AND SETUP

User Guide – Administration

Home Page



The screenshot shows the home page of the Procurement Management Support System (PMSS). At the top left is the NPIU logo. To the right, it says "National Project Implementation Unit (A Government of India Unit for World Bank Assisted Project for Technical Education)". Below this is a navigation menu with links: "Project Description", "Participating States / Institutions", "Tender Notices", "Best Practices in Procurement", "Documents", and "Contact us". A search option is also available.

On the left side, there is a "PMSS Procurement Management Support System" section with a "Login" form. The form has fields for "Login ID" and "Password", and buttons for "Change Password" and "Forgot Password".

On the right side, there is a section for the "Technical Education Quality Improvement Programme (TEQIP) PHASE-II". It features a large image of students in a classroom. Below the image, there is an "Introduction" section and a list of "Objectives".

Introduction:
 Technical Education Quality Improvement Programme (TEQIP) was envisaged as a long-term programme of about 10-years duration to be implemented in 2-3 phases for transformation of the Technical Education System with the World Bank assistance. As per TEQIP design, each phase is required to be designed on the basis of lessons learnt from the implementation of an earlier phase. TEQIP-I started a reform process in 127 Institutions. The reform process needs to be sustained and scaled-up for embedding gains in the system and taking the transformation to a higher level. To continue the development activities initiated through TEQIP-I, a sequel Project is planned as TEQIP-II.

Objectives

- Strengthening Institutions to produce high quality engineers for better employability,
- Scaling-up postgraduate education and demand-driven Research & Development and Innovation,
- Establishing Centers of Excellence for focused applicable research,

Vision

To develop and nurture a Technical Education System in the country which would produce skilled manpower of the highest quality comparable to the very best in the world and in adequate numbers to meet the complex technological needs of the economy; and provide the nation a comparative advantage in the creation and propagation of innovative technological solution and in the development of a technological capacity of the highest order, both for its application in economic development of the country and for becoming a major

Login

Enter the Login ID and Password in the provided textboxes on the home page to enter into the system. If wrong credentials are entered by the user system won't allow user to login into the system.

Change Password

The user can change the password at will. For this user needs to click on "Change Password" link on the home page.

A pop up will be displayed as below.



The screenshot shows a "Change Password - Windows In..." dialog box. It has a title bar with "Set Password", "Close", and "Help" buttons. The main area is titled "Change Password" and contains four text input fields: "Login Name", "Old Password", "New Password", and "Confirm Password". Each field has a red asterisk (*) to its right, indicating a required field. At the bottom of the dialog, there are buttons for "Set Password", "Close", and "Help".

The user will have to specify the user name, the old password, enter the new password and then re-enter the new password. The system will indicate the success or failure of changing the password.

The user will have to close the popup and re-enter the login credentials according to the recently changed password.

Forgot Password

If user has forgotten his/ her password, he/ she can send the request to reset the password. Enter Login ID and click on the "Forgot Password" link. Password will be sent to the user through email.

Configuration Module

To access the Configuration Module, click on Configuration link.

The screenshot displays the PMSS Configuration Module interface. The top navigation bar includes 'Procurement', 'MIS', 'Request/Queries', and 'Configuration'. The user is logged in as 'prakash(NPIU Administrator - NPIU)'. The left sidebar shows the 'CONFIGURATION' menu with options: Application Settings, Masters, User Maintenance, Define Procurement Plan, and Security. The main content area shows the 'CONFIGURATION > NPIU' form with the following fields:

- Code: NPIU
- Name: National Project Implementation Un
- Address: CIL House, 4th Floor, Plot No 45
- Phone Number: 123456, 123456, 123456, 123456
- Email ID: PMSSsystem@NPIU111.com
- Fax Number: 123456777
- Credit Number: L/D9.0/54824525
- Allocated Budget: 1200000
- Project Name: Technical Education Quality Improve
- Project Cost: 2000000

Below the form is a 'Purchase Committee' table with the following data:

Committee Member Name	Designation	Role In Purchase Committe	De
Mrs Kalpana Raut	Business Analyst	Incharge	
Mrs gupta	ajksd		
Mr saxena	some de		

Under this module user will be able to define the following;

- Application Settings
- Masters
- User Maintenance
- Procurement Plan Definition
- Security

Application Settings

To access Application Settings **go to Configuration-> Application Settings.**

Procurement MIS Request/Queries Configuration

User : prakash(NPIU Administrator - NPIU)

CONFIGURATION > Application Settings

Dollar Rupee Conversion Rate * Note: This rate will be used for calculating threshold of procurement me

Elapsed Period For Bid Opening * Hrs.

No. Of Revisions To Procurement Plan * Note: If 0 then unlimited revisions

Shopping Payment Terms

% Payment After Delivery *

% Payment After Acceptance *

Procurement Budget Allocation (in %)

Civil Works (for Subcomponent 1.1)

Civil Works (for Subcomponent 1.2)

Services

Following fields can be setup here:

Field Name	Sample value in the field	Information about the field
Dollar Rupee Conversion Rate	50	The rate that is put in this field will be used for \$ to Rs. Conversion when calculating the thresholds for the methods
Elapsed Period For Bid Opening	48	Bid opening data cannot be entered in the system if the user fails to input the bid opening data within the number of hrs that are put in this field
No. Of Revisions To Procurement Plan		User will be able to revise his/ her plan based on the number configured here
% Payment After Delivery	90	This field is used in Shopping Method Payment terms definition
% Payment After Acceptance	10	This field is used in Shopping Method Payment terms definition
Civil Works (for Subcomponent 1.1)	5	This field is used to calculate the allocated budget for Civil works for institutions under Subcomponent 1.1
Civil Works (for Subcomponent 1.2)	3	This field is used to calculate the allocated budget for Civil works for institutions under Subcomponent 1.2
Services	2	This field is used to calculate the allocated budget for Services for the institutions.

Masters

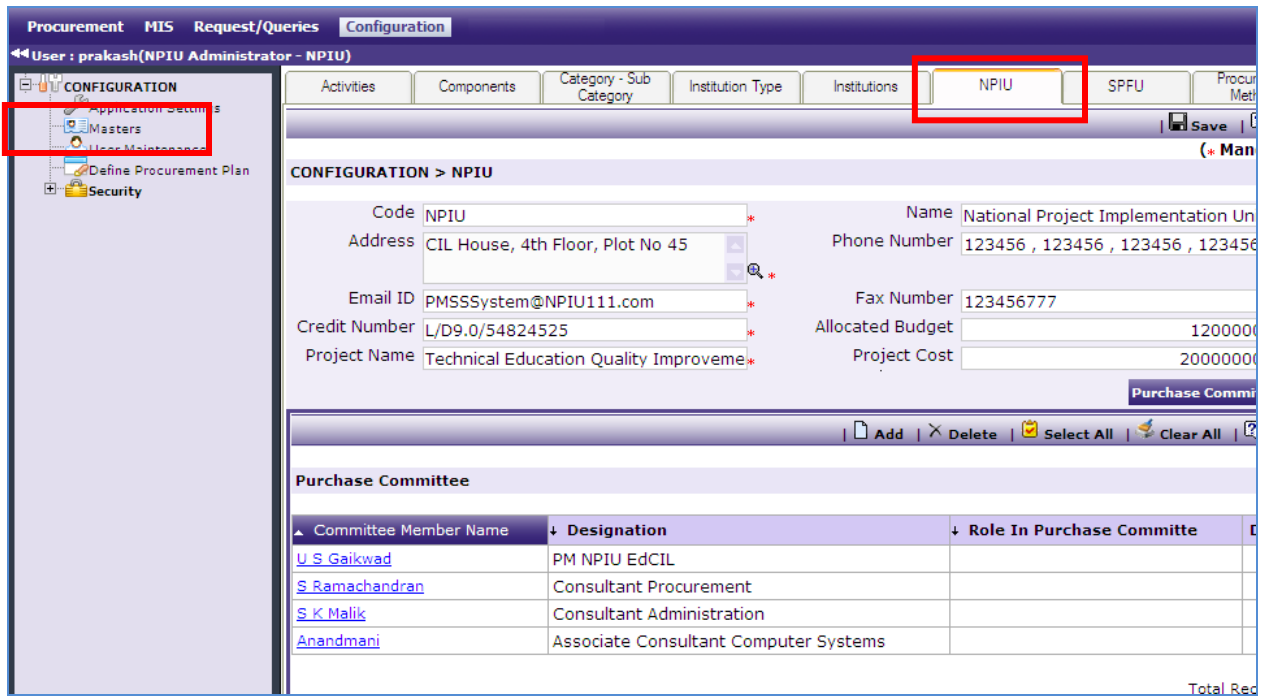
To access Masters node **go to Configuration-> Masters.**

Under this node user will be able to define the following;

- NPIU
- SPFU
- Activities
- Components and Sub-components
- Institution Types
- Institutions
- Procurement Methods

NPIU

Go to Configuration-> Masters-> NPIU



Following fields can be setup here:

Field Name	Sample value in the field	Information about the field
Code	NPIU	This is a code given to NPIU. When a ProcurementRequestID is generated for NPIU this code will be used in the ID generation. E.g. ProcurementRequestIDs will be TEQIP-II/NPIU/1, TEQIP-II/NPIU/2 etc

Name	National Project Implementation Unit	
Email ID	npiuw@hotmai.com	All emails sent to NPIU will go to this email id
Telephone Number	0120 – 2513921	NPIU’s Telephone Number
Fax Number	0120 - 2512485	NPIU’s Fax Number
Address	ED. CIL House 4th Floor, Plot No. 18 A, Sector 16 A, Noida, Gautam Budh Nagar Uttar Pradesh, India - 201301	NPIU’s Address
Credit Number		NPIU’s load account number
Allocated Budget		Allocated Budget for TEQIP II
Project Name	TEQIP II	Used in Shopping - letter of invitation
Project Cost		TEQIP Project’s cost, used in Shopping - letter of invitation

Once the above data is saved a sub tabs will appear;

- Purchase Committee

Purchase Committee

Purchase Committee for the NPIU can be created here.

CONFIGURATION > NPIU

Code <input type="text" value="NPIU"/>	Name <input type="text" value="National Project Implementation Unit"/>
Address <input type="text" value="CIL House, 4th Floor, Plot No 45"/>	Phone Number <input type="text" value="123456 , 123456 , 123456 , 123456 12"/>
Email ID <input type="text" value="PMSSSystem@NPIU111.com"/>	Fax Number <input type="text" value="123456777"/>
Credit Number <input type="text" value="L/D9.0/54824525"/>	Allocated Budget <input type="text" value="120000000"/>
Project Name <input type="text" value="Technical Education Ouality Improve"/>	Project Cost <input type="text" value="200000000"/>

Purchase Committee (4)

Add | Delete | Select All | Clear All | Help

Committee Member Name	Designation	Role In Purchase Committe	Delete
U S Gaikwad	PM NPIU EdCIL		<input type="checkbox"/>
S Ramachandran	Consultant Procurement		<input type="checkbox"/>
S K Malik	Consultant Administration		<input type="checkbox"/>
Anandmani	Associate Consultant Computer Systems		<input type="checkbox"/>

Total Records :4

To define the purchase committee the user can come to this sub tab;

- Click on 'Add' link
- Enter the Committee Member name
- Enter his/ her Designation
- Enter his/ her Role In Purchase Committee
- Click 'Save'

To add another Committee member user can repeat the above steps

SPFU

Go to Configuration-> Masters-> SPFU-> 'Add'

The screenshot shows the 'SPFU' configuration form. The 'SPFU' tab is highlighted in red. The form contains the following fields:

- Code: WB *
- Name: West Bengal *
- Email ID: wb@wb111.com *
- Phone Number: 033-65872365 *
- Address: West Bengal *
- Fax Number: 033-65872366 *
- Website URL: www.wb111-wb.com *
- Allocated Budget: 23000000 *

Following fields can be setup here:

Field Name	Sample value in the field	Information about the field
Code	SPFU's Short Name	This is a code given to SPFU. When a ProcurementRequestID is generated for SPFU this code will be used in the ID generation. E.g. ProcurementRequestIDs for Maharashtra will be TEQIP-II/MH/1, TEQIP-II/MH/2 etc
Name		SPFU's Name
Email ID		All emails sent to SPFU will go to this email id
Telephone Number		SPFU's Telephone Number
Fax Number		SPFU's Fax Number
Address		SPFU's Address
Website URL		SPFU's Website URL
Allocated Budget		Allocated Budget for SPFU

Once the above data is saved two sub tabs will appear;

- Purchase Committee
- SPFU Logo

Purchase Committee

Purchase Committee for the SPFU can be created here.

CONFIGURATION > SPFU

Code <input style="width: 90%;" type="text" value="AP"/>	Name <input style="width: 90%;" type="text" value="Andhra Pradesh"/>
Email ID <input style="width: 90%;" type="text" value="ap@npiu111.com"/>	Phone Number <input style="width: 90%;" type="text" value="085-65872365,"/>
Address <input style="width: 90%;" type="text" value="Andhra Pradesh"/>	Fax Number <input style="width: 90%;" type="text" value="085-65872366"/>
Website URL <input style="width: 90%;" type="text" value="www.npiu111-ap.com"/>	Allocated Budget <input style="width: 90%;" type="text" value="1000000"/>

Purchase Committee (3) **SPFU Logo (1)**

Purchase Committee

Committee Member Name	Designation	Role In Purchase Committee	Delete
G RANGANATH	SECRETARY STATE BOARD		<input type="checkbox"/>
MMMMMM	GM PURCHASES		<input type="checkbox"/>
UVSN MURTHY	JOINT DIRECTOR		<input type="checkbox"/>

To define the purchase committee the user can come to this sub tab;

- Click on 'Add' link
- Enter the Committee Member name
- Enter his/ her Designation
- Enter his/ her Role In Purchase Committee
- Click 'Save'

To add another Committee member user can repeat the above steps

SPFU Logo

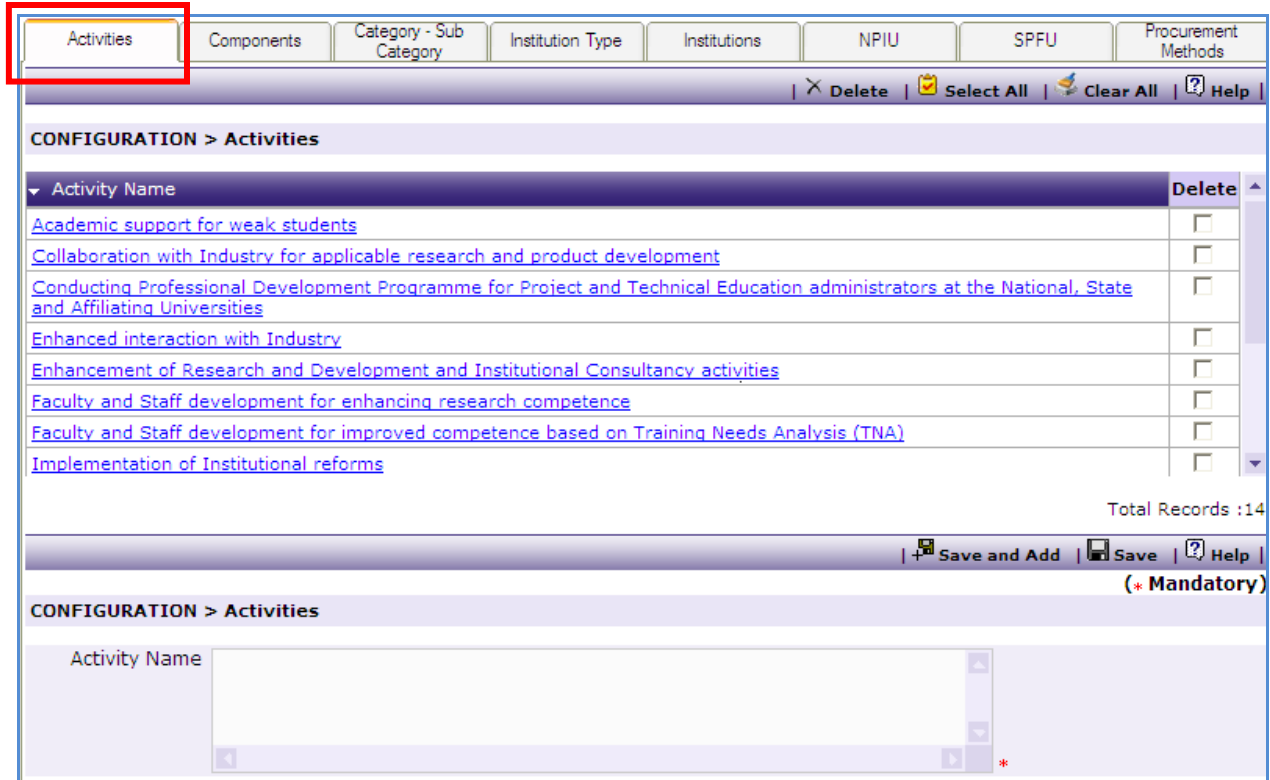
SPFU Logo can be uploaded here;

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

All the Project SPFUs can be created by repeating the above steps.

Activities

Go to Configuration-> Masters-> Activities



This page will allow the user to define Project Activities.

Following fields can be setup here:

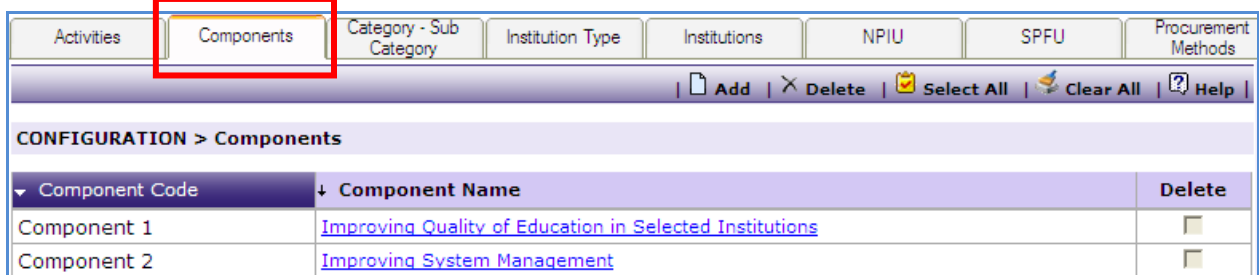
Field Name	Sample value in the field	Information about the field
Activity Name		Enter Activity Name here

To add new project activity,

- Click on 'Add' or 'Save and Add' link
- Enter Activity Name
- Click 'Save' or 'Save and Add' (To continue adding project activities)

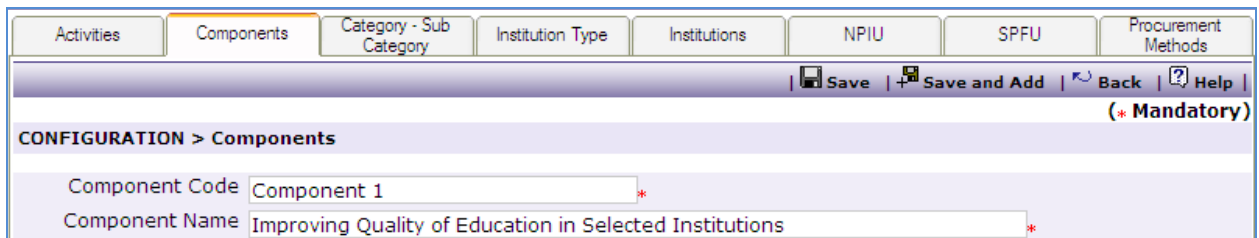
Components and Sub-components

Go to Configuration-> Masters-> Components



This page will allow the user to define Project Components and Sub-components

To add new components, user can click on "Add" link. Following screen will be displayed.



Following fields can be setup here:

Field Name	Sample value in the field	Information about the field
Component Code		Enter Component Code here. This component code will be used on all pages to identify this component.
Component Name		Enter Component Name here

To save the details, user can click on 'Save' or 'Save and Add' link (To continue adding more components)

Once save a Sub Component section will appear.

Sub-Components

To add new sub-component under the component, user can click on 'Add' link in Subcomponent sub tab.

To modify or view details of existing sub-component, user can click on name of the sub-component. It will show following screen

Following fields can be setup here:

Field Name	Sample value in the field	Information about the field
Sub Component Code		Enter Sub-Component Code here. This code will be used on all pages to identify this Sub-Component.
Component Name		Enter Sub-Component Name here

To save the details, user can click 'Save' or 'Save and Add' (To continue adding more Sub-components under the same Component.)

Once save Activities can be associated to the Sub Component by clicking on the Associate Activities link.

Associated Activities

To associate project activities with the Sub-Component, user can click on 'Associate Activities' link in Sub-component sub tab on Configuration-> Masters-> Components screen.

It will display following screen:-

Sub Component Activities	
Activity Name	Select
Academic support for weak students	<input type="checkbox"/>
Collaboration with Industry for applicable research and product development	<input type="checkbox"/>
Conducting Professional Development Programme for Project and Technical Education administrators at the National, State and Affiliating Universities	<input type="checkbox"/>
Enhanced interaction with Industry	<input type="checkbox"/>
Enhancement of Research and Development and Institutional Consultancy activities	<input type="checkbox"/>
Faculty and Staff development for enhancing research competence	<input type="checkbox"/>
Faculty and Staff development for improved competence based on Training Needs Analysis (TNA)	<input type="checkbox"/>
Implementation of Institutional reforms	<input type="checkbox"/>
Improvement in teaching, training and learning facilities	<input type="checkbox"/>
Incremental Operating Cost	<input type="checkbox"/>
Infrastructure Improvement for teaching, training and learning facilities	<input type="checkbox"/>
Institutional Management Capacity enhancement	<input type="checkbox"/>
National/ International collaboration for Research and Development activities with academic institutions and R & D organisations	<input type="checkbox"/>
Providing Assistantships for increased enrolment in existing and new PG Programmes in Engineering disciplines	<input type="checkbox"/>

Here user can select activities to associate with the sub-component and click on 'Save' link

Category and Sub-category

Go to Configuration-> Masters-> Category and Sub-Category

This is a view only page.

This page will display list of item categories, their sub-categories and Value Threshold rules for the item categories.

Activities	Components	Category - Sub Category	Institution Type	Institutions	NPIU	SPFU	Procurement Methods
							Value Threshold Rules ? Help
CONFIGURATION > Category - Sub Category							
Item Category		▼ Item Sub Category					
Civil Works							
		Extension of Buildings					
		Others					
		Refurbishment works					
		Repair works					
Goods							
		Books & Learning Resources					
		Equipment					
		Furniture					
		Minor Items					
Services							
		Others					
		Professional Services					
		Research/ Consultancy Contracts					
		Training					
		Workshops					

To view Value Threshold rules, user can click “Value Threshold Rules’ link. It will display following screen :

Close		
Value Threshold Rules		
Category	Value (Threshold)	Procurement Method
Civil Works		
	< USD 30,000	Shopping
	>= USD 30,000	NCB
	< USD 1,000	Direct Contracting
Goods : Equipment		
	< USD 20,000	Shopping
	Proprietary item less than USD 20,000	Direct Contracting and Shopping.
	Proprietary item greater than or equal to USD 20,000	Direct Contracting and Shopping. After approval from NPIU
	> USD 20,000 Less than USD 300,000	NCB
	>=USD 300,000	ICB , LIB
Goods : Furniture		
	< USD 20,000	Shopping
Goods : Books , Learning Resources, Proprietary Software, Education Material		
	< USD 20,000	Direct Contracting and Shopping
Goods : Minor Items		
	< USD 500	Direct Contracting
Services		
	>USD 200,000	QCBS
	>USD 100,000 < USD 200,000	QCBS/FBS/LCS
	<=USD 100,000	LCS/CQS/FBS
	< = 2,000	SSS

Institution Type

Go to Configuration-> Masters-> Institution Type

The screenshot shows the 'Institution Type' configuration page in the PMSS application. The 'Institution Type' menu item is highlighted with a red box. The page displays a list of institution types with a 'Delete' column. The 'Centrally Funded Institution' type is listed but has a disabled delete checkbox. Other types include 'Private Unaided institutions', 'State / UT Government Fully Aided Institutions', 'State / UT Government Owned institutions', and 'State / UT Government Partially Aided Institutions'. The page also shows a 'Total Records : 5' and a '(* Mandatory)' label.

Institution Type	Delete
Centrally Funded Institution	<input type="checkbox"/>
Private Unaided institutions	<input type="checkbox"/>
State / UT Government Fully Aided Institutions	<input type="checkbox"/>
State / UT Government Owned institutions	<input type="checkbox"/>
State / UT Government Partially Aided Institutions	<input type="checkbox"/>

Total Records : 5

Save and Add Save Help (* Mandatory)

CONFIGURATION > Institution Type

Institution Type *

This page will allow the user to define Institution Types. User can add new types or modify/delete existing types in the list.

Following fields can be setup here:

Field Name	Value in the field	Information about the field
Institution Type	Text	Enter Institution Type Name

To add new Institution Type,

- Click on 'Add' or 'Save and Add' link
- Enter Institution Type
- Click 'Save' or 'Save and Add' (To continue adding more types)

Note: User cannot delete Institution Type "Centrally Funded Institution".

Institutions

Go to Configuration-> Masters-> Institutions-> 'Add'

CONFIGURATION > Institutions (* Mandatory)

Code: 12 *
 Name: National Engineering College *
 Institution Type: Private Unaided institutions *
 Monitoring Agency: SPFU *
 State: Andhra Pradesh *
 Website URL: *
 Phone Number: *
 Fax Number: *
 Email ID: *
 Director: *

Following fields can be setup here:

Field Name	Value in the field	Information about the field
Code	Institution's Code	This is a code given to Institution. When a ProcurementRequestID is generated for institution this code will be used in the ID generation.
Name		Institution's Name
Institution Type		CFI, Private etc
State	SPFU's Name	If Institution is not a CFI then State's name can be selected
Email ID		All emails sent to the Institution will go to this email id
Telephone Number		Institution's Telephone Number
Fax Number		Institution's Fax Number
Address		Institution's Address
Website URL		Institution's Website URL
Allocated Budget		Allocated Budget for the Institution

Once the above data is saved four sub tabs will appear;

- Institution Departments
- Institution Purchase Committee
- Institution Sub Component

➤ Institution Logo

Institution Departments

Departments of the Institution can be created here.

To define the Departments, user can come to this sub tab;

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

To add another Department user will repeat the above steps

Institution Purchase Committee

Purchase Committee for the Institution can be created here.

To define the purchase committee the user can come to this sub tab;

- 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 departments created in the above Department sub tab)
- Click 'Save'

To add another Committee member user can repeat the above steps

Institution Sub Component

Mapping of the institution to the Sub Components can be done here.

To map the sub components to an institution the user can come to this sub tab;

- Click on 'Add' link
- Map (select) the Sub Component
- Enter the Allocated Budget
- Allocated Budget for Civil works and Services will get Auto calculated.
- Click 'Save'

To map more sub components the user can repeat the above steps.

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'

All the Project institutions can be added by repeating the above steps.

Procurement Methods

Go to Configuration-> Masters-> Procurement Methods

Category	Procurement Method Code	Procurement Method
	CQS	Consultant Qualification Based selection
	FBS	Fixed Budget Selection
	LCS	Least Cost Selection
	SSS	Single Source Selection
Goods		
	ICB	International Competitive Bidding (ICB)
	LIB	Limited International Bidding
Goods/Works		
	Direct Contracting	Direct Contracting
	NCB	National Competitive Bidding
	Shopping	Shopping
Services		
	QCBS	Quality and Cost Based Selection

Click on a method to define the timelines for that method.

Following fields can be defined for Shopping/ Direct Contracting/ NCB/ ICB/ LIB;

Field Name	Value in the field	Information about the field
Bid Document Preparation Date	Enter Number of day	For NCB/ ICB/ LIB; 'Bid Document Preparation Date' in the Procurement Plan will be calculated based on number of days inputted in this field plus the 'estimated financial section' date.

Bank's NOC for Bidding Documents	Enter Number of day	For NCB/ ICB/ LIB, when prior review is applicable 'Bank's NOC for Bidding Documents Date' in the Procurement Plan will be calculated based on number of days inputted in this field plus the 'estimated financial section' date.
Bid Invitation Date	Enter Number of day	'Bid Invitation Date' in the Procurement Plan will be calculated based on number of days inputted in this field plus the 'estimated financial section' date.
Bid Opening Date	Enter Number of day	'Bid Opening Date' in the Procurement Plan will be calculated based on number of days inputted in this field plus the 'estimated financial section' date.
Contract Award date	Enter Number of day	'Contract Award date' in the Procurement Plan will be calculated based on number of days inputted in this field plus the 'estimated financial section' date.
Date of completion of Contract	Enter Number of day	'Date of completion of Contract' in the Procurement Plan will be calculated based on number of days inputted in this field plus the 'estimated financial section' date.

Similarly timelines can be defined for QCBS/ FBS/ CQBS/ LIS/ QBS/ SSS.

User Maintenance

The users can be added under this node. To add users **go to Configuration-> User Maintenance-> 'Add'**.

The screenshot shows the 'User Maintenance' form in the PMSS Configuration section. The form is titled 'CONFIGURATION > User Maintenance' and includes a 'User Name : vinay' indicator. The form fields are as follows:

- Employee Name: Vinay M *
- First Name: Vinay *
- Middle Name: M
- Last Name: [Empty]
- User Name: vinay *
- Birth Date: 11/2
- Gender: Male
- Email ID: vinay@email.com *
- Phone: [Empty]
- Address: [Empty]
- City: [Empty]
- Pin Code: [Empty]
- Role: Procurement Coordinator (Institution) *
- State: Andhra Pradesh
- Institution: GSD ENG

The left sidebar shows the 'CONFIGURATION' menu with 'User Maintenance' highlighted in red. Other options include Application Settings, Security, User Login Maintenance, Role Maintenance, Role Access, and Bulk Login Creation.

Following fields can be captured for the user:

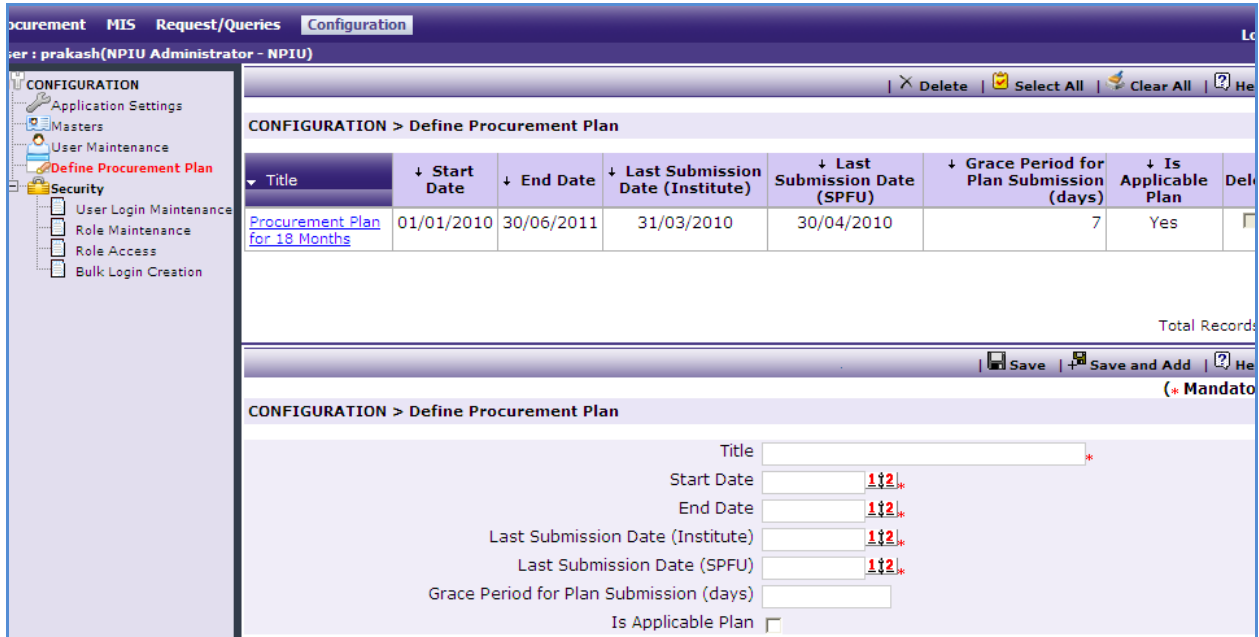
Field Name	Value in the field	Information about the field
First Name	e.g. Mohammed	Enter the name of the person
Middle Name	e.g. Al	Enter the middle name of the person
Last Name	e.g. Shaikh	Enter the family name of the person
User Name	e.g. shaikh.Mohammed	This is a unique name by which user will be identified by the system.
Birth Date		Person's birth date
Gender		Choose either Male or Female
Email	shaikh.mohammed@yahoo.co.in	Enter a valid Email address. Emails will be received by this user at this email address
Phone		Enter telephone number
Address		Address of the user
City		
Pin Code		
Role	Role of the person	Select the role of the person i.e. Procurement Coordinator, SPA etc
State		
Institution	Institution, if applicable	Select the institution name if the user is at institution level. For NPIU ,SPFU and WB users institution will be blank

Once above data is filled, click 'Save'

All the users can be added by repeating the above steps.

Procurement Plan Definition

Go to Configuration-> Procurement Plan Definition.



This page will allow the user to define the procurement plans. Following fields can be defined for a plan;

Field Name	Value in the field	Information about the field
Title	e.g. Procurement Plan for 18 Months	Give a title to the plan
Start Date	e.g. 01/11/2010	Enter Start Date of Plan
End Date	e.g. 31/05/2010	Enter End Date of Plan
Last Submission Date (Institute)		Last day by which institutes are expected to submit their plans
Last Submission Date (SPFU)		Last day by which SPFUs are expected to submit their plans
Grace Period for Plan Submission (days)	Enter number of days	Grace period given for plan submission
Is Current Plan?	Current Plan	Check if the plan belong to the current period

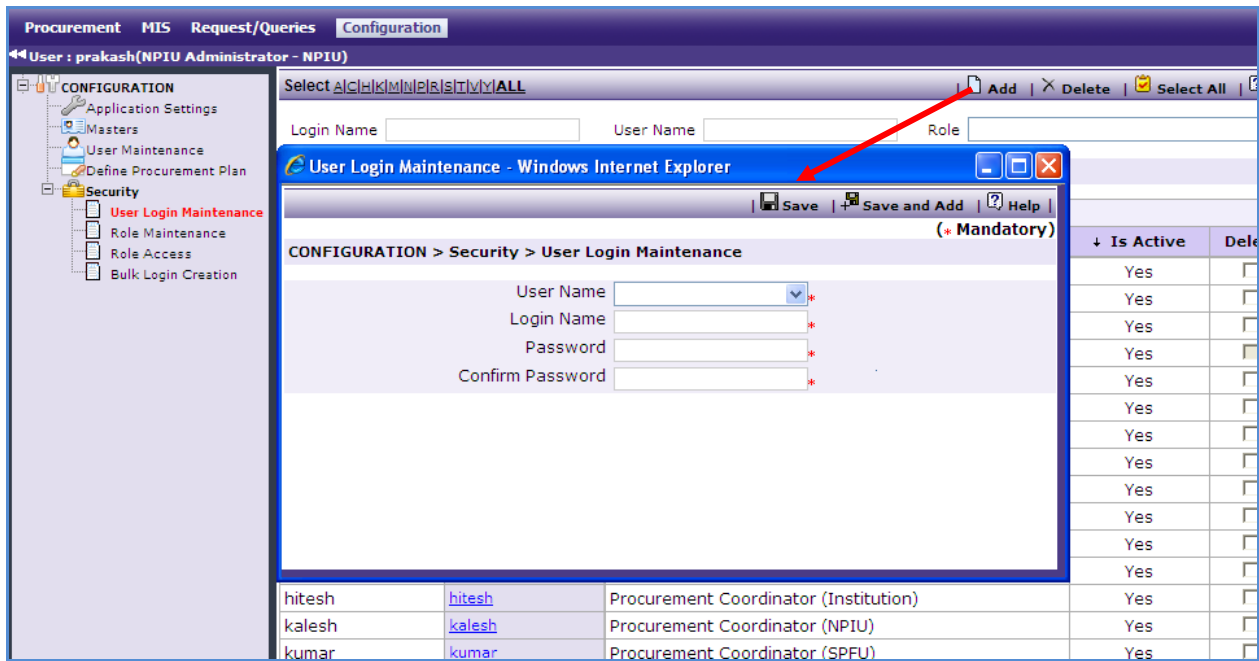
Security

Under this module user will be able to define the following;

- User Login Maintenance
- Role Access

User Login Maintenance

Go to Configuration-> Security-> User Login Maintenance -> 'Add'



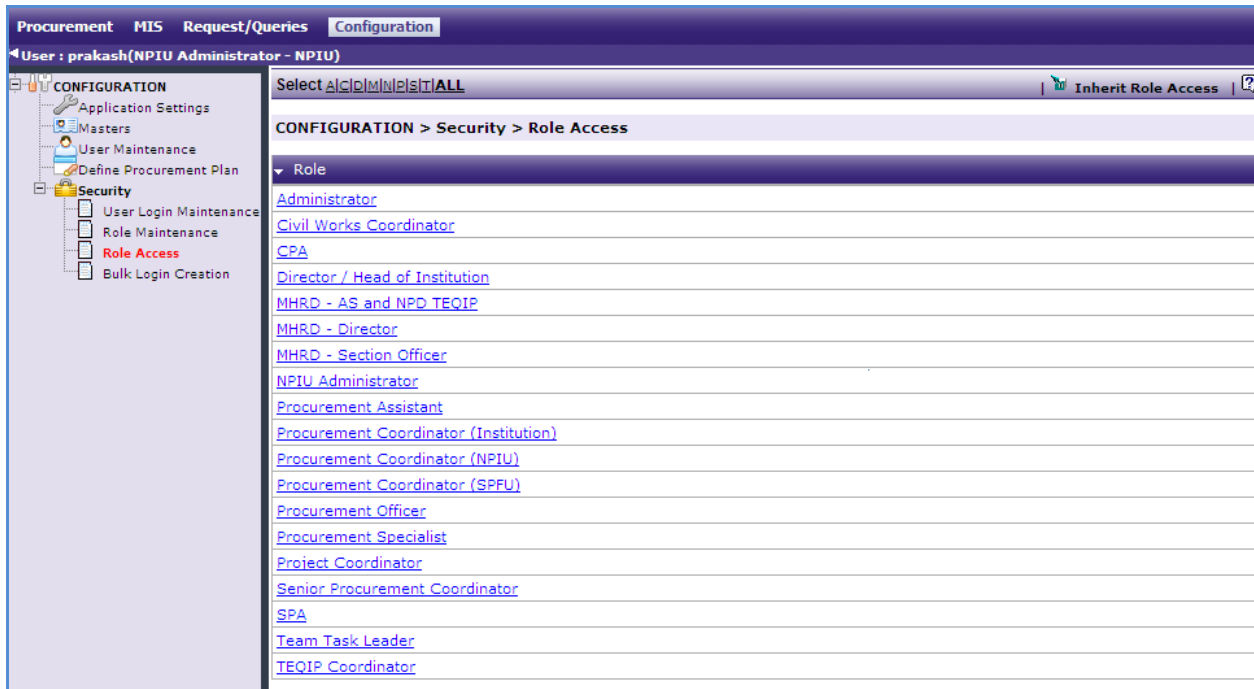
Logins for the existing users (i.e. users which are created in the User Maintenance node) can be created here. Following fields can be setup here:

Field Name	Value in the field	Information about the field
User Name	e.g. shaikh.mohammed	All the user for whom logins are not created will be listed in this dropdown
Login Name	e.g. shaikh.mohammed	By default the 'User Name' will be shown in this field, if required this can be changed in order to have a different login name.
Password		Enter a password for the user.
Confirm Password		Enter the same password as above. Email can be sent to the user, to notify him about his password

Role Access

Role access allows user to define access rights for each role. On this page, user can specify which role has access to which feature of the system. To configure role access **go to Configuration-> Security-> Role Access**

The default screen will list all the roles that are defined in the system.



Click on the role to which access is to be set to get a pop-up;

Role Access							Role : Procurement Coordinator (Institution)						
Select Module <input type="text" value="Procurement"/>													
Functionality	Subtag Access	Access	Add	Edit	Delete	View							
Procurement		<input checked="" type="checkbox"/>											
Procurement-->Notice/Circulars	Subtag Access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Plan		<input checked="" type="checkbox"/>											
Plan-->Approvals		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
Plan-->Approvals		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
Plan-->Prepare Plan	Subtag Access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Plan-->Procurement Plan Details (Services)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
Plan-->Revised Plans	Subtag Access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Process		<input checked="" type="checkbox"/>											
Process-->In Progress	Subtag Access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Process-->Initiate	Subtag Access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Process-->Prior Reviews		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							

- In the 'Select Module' dropdown select a module e.g. Procurement, MIS etc
- All the nodes of selected module will be listed
- Give the appropriate Add/ Edit/ Delete rights to the role.

Bulk Login Creation

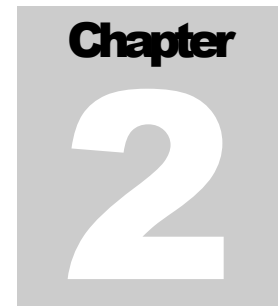
This feature can be used to create many logins in one go. To use this feature **go to Configuration-> Security-> Bulk Login Creation**

The default screen will list all the users for which logins are not created.

The screenshot shows the 'Bulk Login Creation' screen in the PMSS v1.0 application. The interface includes a navigation pane on the left with 'Bulk Login Creation' highlighted. The main content area shows a table of active resources for which logins are not yet created. The table has columns for 'Select', 'Resource', 'Role', 'Email ID', 'Institution Name', and 'SPFU Name'. Three users are listed in the table:

Select	Resource	Role	Email ID	Institution Name	SPFU Name
<input checked="" type="checkbox"/>	Sangeeta P Patel	Procurement Coordinator (NPIU)	rajcumarm@compulink.co.in		
<input checked="" type="checkbox"/>	sarah s s	Procurement Coordinator (Institution)	sarah@sarah.com	D.Y Patil College	
<input checked="" type="checkbox"/>	testusr	Procurement Coordinator (Institution)	ashwinir@compulink.co.in		

- Select the users for which login have to be created
- Click 'Create Login'
- An email will be sent to the users which will contain their password.
- There are filters on top of the page (Institution, Role etc). Select the appropriate filter to list the users accordingly. E.g. to list the users of a particular institution select that institution's name in the Institution filter. The page will list (display) the users belonging to the selected institution. Then logins can be created for all the users of this institution in one go.



PROCUREMENT PLAN

User Guide – Procurement Plan

Procurement Plan

Procurement plan is the heart of PMSS. No procurement can be initiated through PMSS unless it has been approved in the procurement plan.

Once a plan is defined in the configuration module by the NPIU user, it will start to list for all the Institutions and SPFUs.

Title	Current Stage	Sub Component	Last Date Of Submission	PIP View	PIP View Report	Stage Inform
Procurement Plan for 18 Months (From 01 Jan 2010 to 30 Jun 2011)	Under Preparation	1.1	31/03/2010	PIP View	PIP View Report	Stage Inform

Institutions and SPFUs will see a link as shown in the above snapshot. They can click on this link and start to create a detail procurement plan.

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 as per section below.

Procurement Plan Creation

To create procurement plan **go to Procurement-> Plan-> Prepare Plan**

PMSS Procurement Management Support System Technical Education Quality Improvement Programme (TEQIP) PHA

e-Dashboard Procurement MIS Request/Queries Configuration

User : swapnil(Procurement Coordinator (Institution) - IITM Gwalior)

Period: Current

Procurement > Plan > Prepare Plan

Title	Current Stage	Sub Component	Last Date Of Submission	PIP View	PIP View Report	Stage Inform
Procurement Plan for 18 Months (From 01 Jan 2010 to 30 Jun 2011)	Under Preparation	1.1	31/03/2010	PIP View	PIP View Report	Stage Inform

1. Click on the Procurement Plan Title, a detailed page will open as shown below;

Submit Procurement Plan | PIP View | PIP View Report | Help | Back

(*) Mandatory

Procurement > Plan > Prepare Plan

Title: Procurement Plan for 18 Months (From 01 Jan 2010 to 30 Jun 2011) Revision#: 0

Goods/ Works (0) Services (0)

Add | Help

Goods/ Works

Category	Package Code	Package Name	Estimated Cost	Actual Cost	Define Timelines	Delete
There are no items to show in this view.						

2. To plan procurements of goods/ civil works; Click on the 'Goods/ Civil Works' tab. Then click on 'Add' a page to add package will be seen as show below;

Package-Item details - Windows Internet Explorer

Save | Save and Add | Close | Help

(*) Mandatory

Package-Item details National Project Implementation Unit | Plan Title : Procurement Plan for 18 Months (From 01 Jan 2010 to 30 Jun 2011)

Package Name: * Description:

Category: * Sub Category:

Sub Component: * Activity:

Indicative Procurement Method: * Suggest Methods Estimated Cost:

Est. Financial Sanction Date: * 11/2 *

Is Proprietary?

3. Enter data in the following fields on this page;
 - Package Name
 - Description
 - Category – Based on the Category items section will appear
 - Sub Category
 - Activity – There is a small box in front of this field. If required, Click on this box to see the complete name of the 'Activity'
 - Estimated Financial Section Date
 - Is Proprietary – Check this box for proprietary items.
4. Adding at least one Item is mandatory. To add an Item click on the 'Add' link a row will appear where the item details can be added.

Package-Item details NIT Rourkela | Plan Title : Procurement Plan for 18 Months (From 01 Jan 2010 to 30 Jun 2010) (* Mandatory)

Package Name: FZL Filters * Description: Chemical filters

Category: Goods * Sub Category: Equipment

Activity: Enhancement of Research and Development and... * Estimated Cost: []

Indicative Procurement Method: [] * Suggest Methods Est. Financial Sanction Date: 16/10/2010 11:21 *

Item Details

Add | Delete | Select All | Clear All | Help

Item Details

Adding at least one Item is mandatory. Once the items are added click on the 'Suggest Method' link to select the Procurement Method.

Delete	Item Name	Description	Quantity	Est. Cost/Unit	Estimated Cost	Procuring Department	Dept. wise Breakup
--------	-----------	-------------	----------	----------------	----------------	----------------------	--------------------

5. Enter data in the required fields;
6. To add another item, repeat the steps 4 and 5.
7. Once all the items are added, Click on the 'Suggest Methods' link. This will populate the 'Indicative Procurement Method' dropdown. The method(s) will be populated based on the total 'Estimated Cost'

Package-Item details NIT Rourkela | Plan Title : Procurement Plan for 18 Months (From 01 Jan 2010 to 30 Jun 2010)

Package Name: FZL Filters
 Description: Chemical filters
 Category: Goods
 Sub Category: Equipment
 Activity: Enhancement of Research and Development and
 Estimated Cost: 36000.00
 Indicative Procurement Method: [Dropdown] * Suggest Methods
 Est. Financial Sanction Date: 16/10/2010 13:2*

Item Details

Adding at least one Item is mandatory. Once the items are added click on the 'Suggest Method' link to select the Procurement Method.

Delete	Item Name	Description	Quantity	Est. Cost/Unit	Estimated Cost	Procuring Department	Dept. w/ Breakup
<input type="checkbox"/>	Filter Conial Slad	Conical 21* 34	12*	3000.00*	36000.00	Chemical Engineering	*

8. Select the appropriate method in the 'Indicative Procurement Method' dropdown.
9. Click 'Save'
10. Once saved, 'Define Timelines' link will appear. The purpose of this link is to input the estimated dates of Bid Invitation, Bid Opening, etc for that package.

Package-Item details NIT Rourkela | Plan Title : Procurement Plan for 18 Months (From 01 Jan 2010 to 30 Jun 2010)

Package Code: TEQIP-II/NITRO/7
 Package Name: FZL Filters
 Description: Chemical filters
 Category: Goods
 Sub Category: Equipment
 Activity: Enhancement of Research and Development and
 Estimated Cost: 36000
 Indicative Procurement Method: Direct Contracting * Suggest Methods
 Est. Financial Sanction Date: 17/10/2010 11:4 * Define Timelines

Item Details

Adding at least one Item is mandatory. Once the items are added click on the 'Suggest Method' link to select the Procurement Method.

Delete	Item Name	Description	Quantity	Est. Cost/Unit	Estimated Cost	Procuring Department	Dept. w/ Breakup
<input type="checkbox"/>	Filter Conial Slad	Conical 21* 34	12*	3000*	36000	Chemical Engineering	Dept. w/ Brku

11. Click on 'Define Timelines' link, a popup will be seen as shown below;

Financial Sanction dependent dates (* Mandatory)

Package Name FZL Filters

Procurement Method *

Item Category

Estimated Financial Sanction Date 112*

Bid Invitation Date 112*

Bid Opening Date 112*

Contract Award Date 112*

Contract Completion Date 112*

12. Dates will be auto populated based on the Procurement Method and 'Estimated Financial Sanction Date'. These dates can be changed as per actual estimation.
13. In case of Goods category 'Department Wise Breakup' link will appear against those Items which have Procuring Department as 'Institution Level'.
14. Click on 'Dept. Wise Breakup' link, a popup listing all the department of the institution will be seen as shown below;

Department Wise Break Up For Item

Department Name	Quantity
Chemical Engineering	<input type="text" value="0"/>
Civil Engineering	<input type="text" value="0"/>
Electrical Engineering	<input type="text" value="0"/>
Institution Level	<input type="text" value="0"/>

Total Records :4

15. 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.
16. Click 'Save'.
17. To add another package repeat steps from 2 to 16.

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

18. To plan procurements of services; in the 'Services' tab click on 'Add Services' a page to add services will be seen as show below;

The screenshot shows a web browser window titled "Services - Windows Internet Explorer". The browser's address bar and menu bar are visible. The main content area displays a form titled "Services" with a "(* Mandatory)" indicator. The form fields are:

- Service Name: Text input field with an asterisk.
- Description: Text input field with a search icon on the right and an asterisk.
- Category: Dropdown menu with "Services" selected and an asterisk.
- Subcategory: Dropdown menu with an asterisk.
- Activity: Dropdown menu with a small box on the right and an asterisk.
- Total Estimated Cost: Text input field with an asterisk.
- Indicative Procurement Method: Dropdown menu with an asterisk.
- Estimated Financial Sanction Date: Text input field with a calendar icon and an asterisk.

19. Enter data in the following fields on this page;

- Package Name
- Description
- Category
- Sub Category
- Activity – There is a small box in front of this field. If required, Click on this box to see the complete name of the 'Activity'
- Total Estimated Cost
- Indicative Procurement Method
- Estimated Financial Section Date

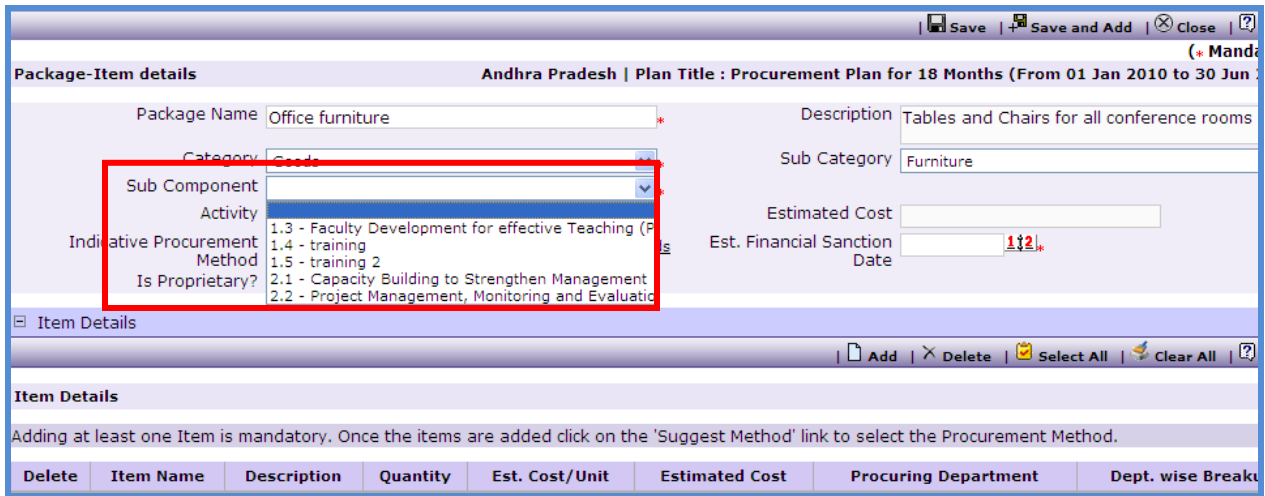
20. Click 'Save'

21. To add another service repeat steps from 18 to 20.
22. 'Define Timelines' link can be seen on the list page. The purpose of this link is to input the estimated dates of TOR Finalization, Advertisement, etc for that Service.
23. Click on 'Define Timelines' link, a popup will be seen as shown below;

Financial Sanction dependent dates	
Package Name	MIS Software
Procurement Method	QCBS*
Item Category	Services
Estimated Financial Sanction Date	22/10/2010
TOR Finalization Date	23/10/2010
Advertisement Date	24/10/2010
Final Draft to be forwarded to the Bank Date	25/10/2010
No Objection from Bank for RFP	27/10/2010
RFP Issued Date	28/10/2010
Last Date to Receive Proposals	29/10/2010
Evaluation Date	30/10/2010
No Objection from Bank for Evaluation	31/10/2010
Contract Award Date	01/11/2010
Contract Completion Date	02/11/2010

24. Dates will be auto populated based on the Procurement Method and 'Estimated Financial Sanction Date'. These dates can be changed as per actual estimation.
25. Once all the packages and services to be procured are added the plan is ready for submission, for Approval.

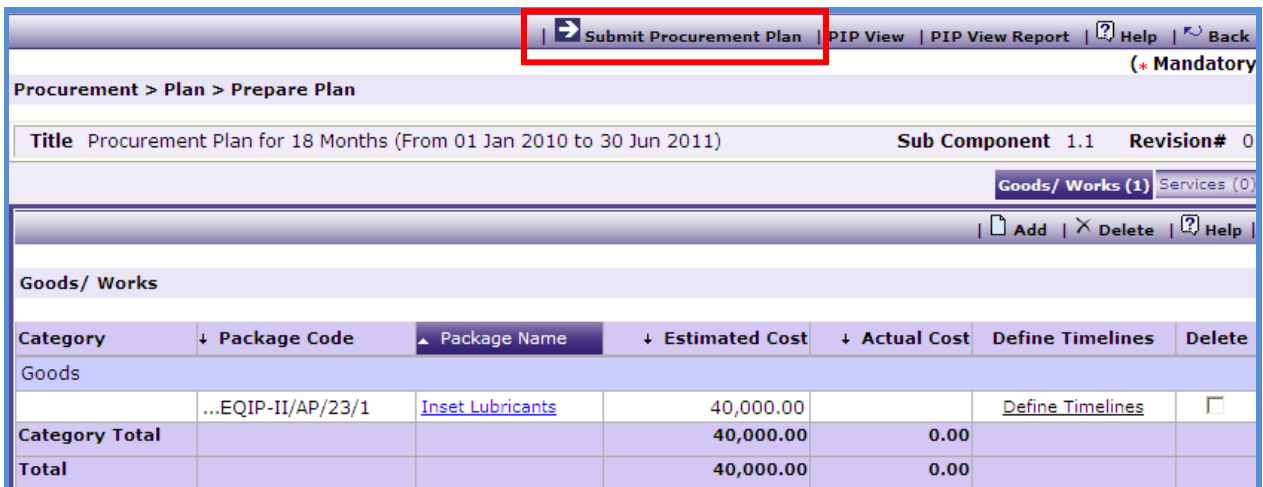
Note: For SPFU and NPIU all the steps (as mentioned above) for Procurement Plan Creation are the same except, they will not have separate plans for each subcomponent. Instead, when adding a package or a service they will have an option to map (select) a subcomponent to the package/ service as shown in the below snapshot;



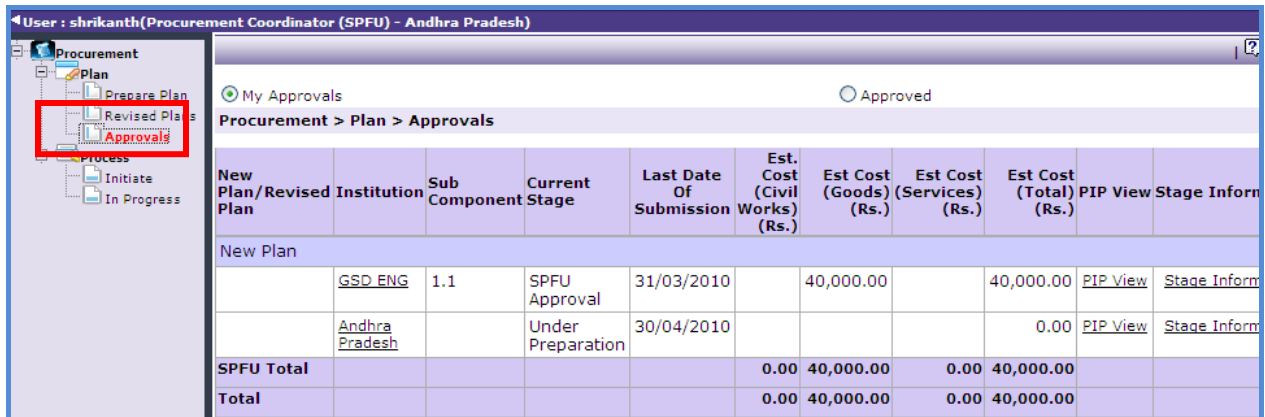
Procurement Plan Approval

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.

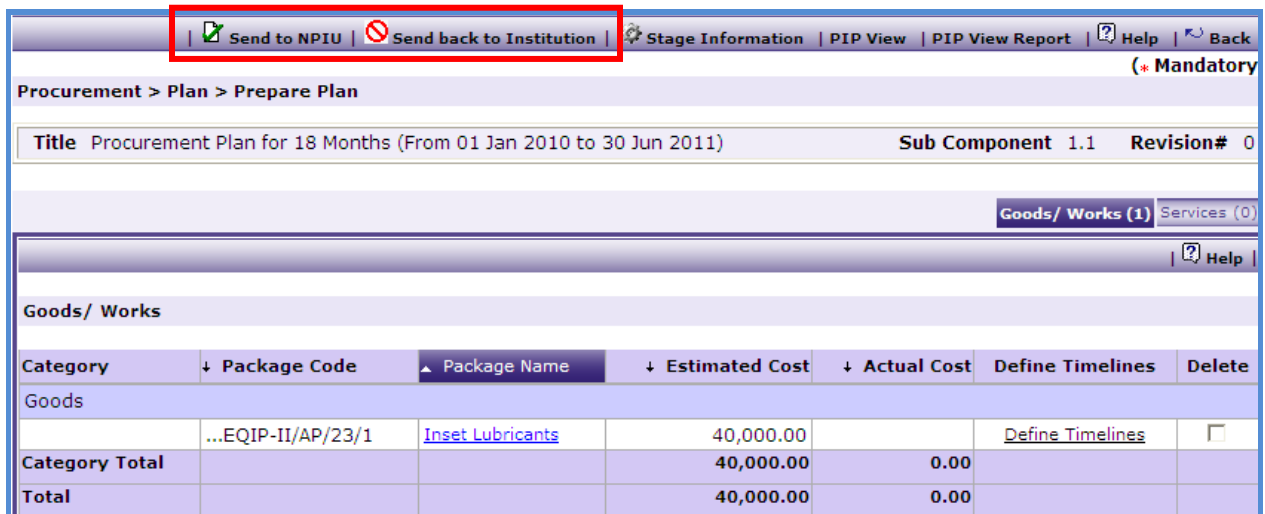
1. To send the plan for approval click on '**Submit Procurement Plan**'



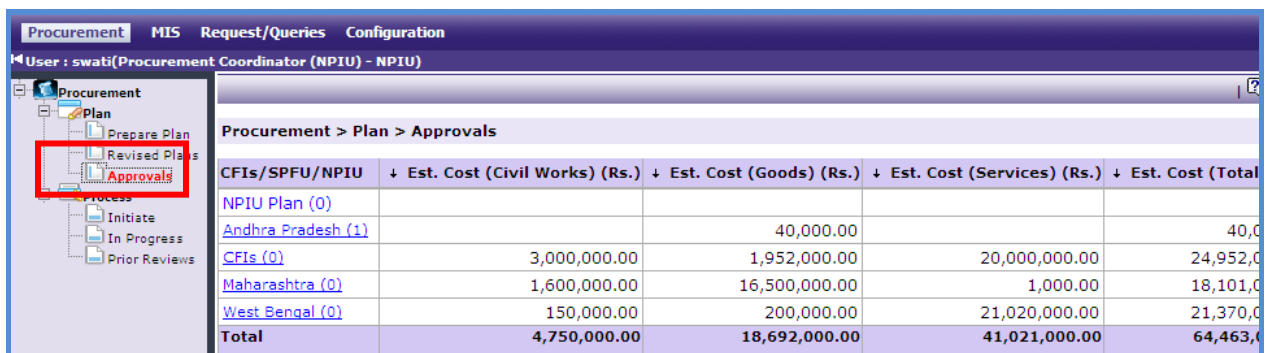
2. For the State Sponsored Institutions the plan will go to its SPFU for approval.
3. SPFU user can login and **go to Procurement-> Plan-> Approvals**



- List of all the institutions along with its own plan can be seen by the SPFU
- Click on the institution to see its detail procurement plan.
- To approve the plan click on the 'Send to NPIU' link. To reject the plan click on 'Send back to Institution' link.



- Once the plan is approved it will go to NPIU for approval.
- NPIU user can login and go to Procurement-> Plan-> Approvals

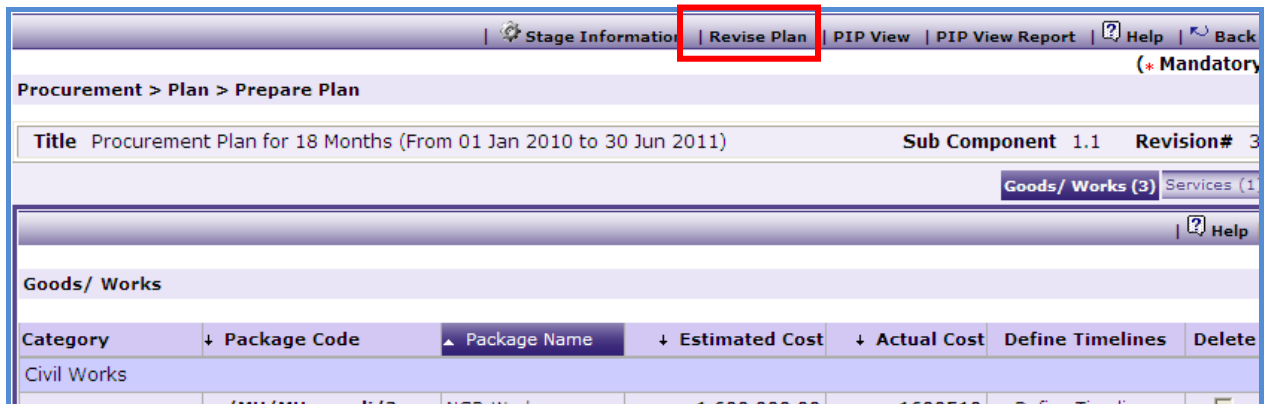


- Click on the SPFU, all the institutions belonging to that SPFU along with the SPFUs plan will be listed.

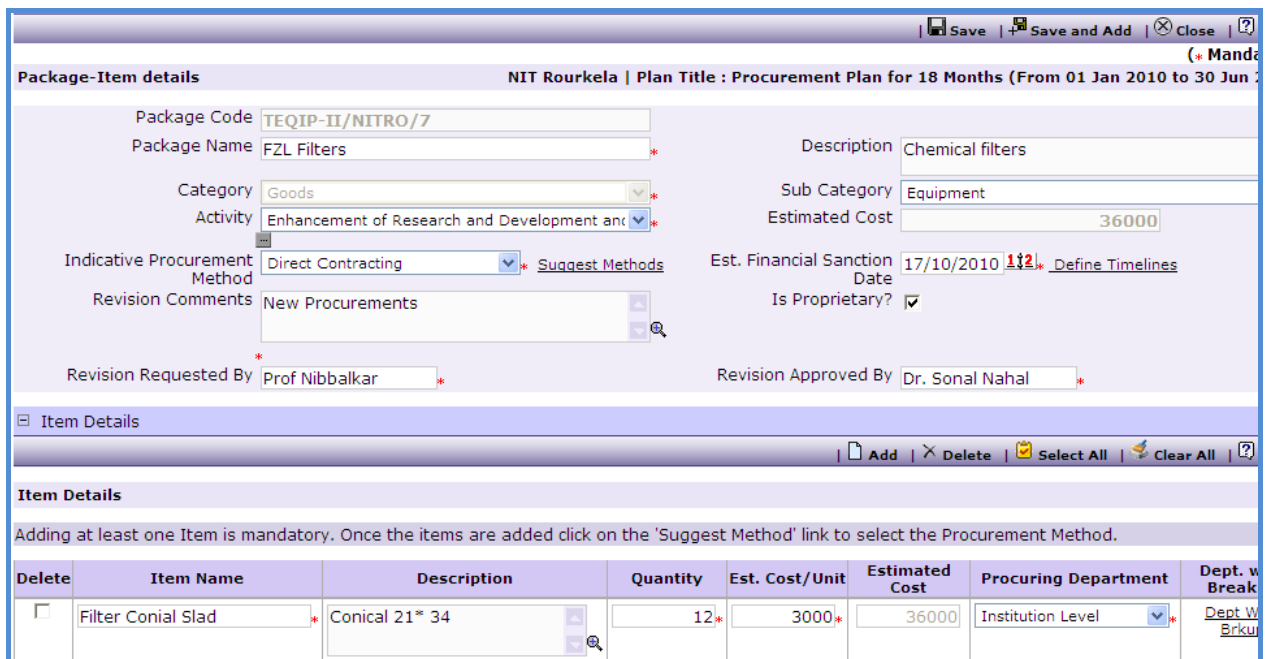
10. Click on the institution to see its detail procurement plan.
11. To approve the plan click on the 'Approve Procurement Plan' link.

Procurement Plan Revision

This function has to be used only when the procurement plan is required to be changed. The changed plan is the revised plan and this revised plan has to go through a revision approval. To revise the procurement plan **go to Procurement-> Plan-> Prepare Plan** click on the **procurement plan title** and click 'Revise Plan'.



1. Click on the package/ service that have to be revised.
2. Make the necessary changes to package/ service



3. Following mandatory filed have to be entered

- Revision Comments
 - Revision Requested By
 - Revision Approved by
4. Click 'Save'
 5. To make changes to another package/ service repeat steps 1 to 4.
 6. New packages can also be added by following steps of adding packages, as described in procurement plan creation section.
 7. All the package/ service, which have been revised will be shown in a different colour as shown below;

The screenshot shows a web application interface for 'Submit Revision For Approval'. The breadcrumb trail is 'Procurement > Plan > Prepare Plan'. The main title is 'Procurement Plan for 18 Months (From 01 Jan 2010 to 30 Jun 2011)'. The sub-component is '1.1' and the revision number is '1'. There are tabs for 'Goods/ Works (6)' and 'Services (1)'. Below the tabs is a table with columns: Category, Package Code, Package Name, Estimated Cost, Actual Cost, Define Timelines, and Delete. The table is divided into 'Civil Works' and 'Goods' sections. The 'FZL Filters' row is highlighted in red.

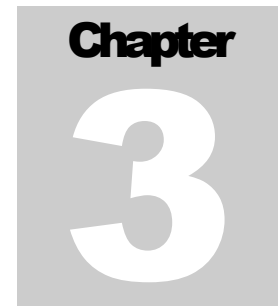
Category	Package Code	Package Name	Estimated Cost	Actual Cost	Define Timelines	Delete
Civil Works						
	...EQIP-II/NITRO/5	MI Tanks	800,000.00		Define Timelines	<input type="checkbox"/>
	...EQIP-II/NITRO/4	Lab Development	2,200,000.00	2300000	Define Timelines	<input type="checkbox"/>
Category Total			3,000,000.00	2,300,000.00		
Goods						
	...EQIP-II/NITRO/1	Suction Apparatus	6,000.00		Define Timelines	<input type="checkbox"/>
	...EQIP-II/NITRO/2	Laboratory and Research Equipment	20,000.00		Define Timelines	<input type="checkbox"/>
	...EQIP-II/NITRO/7	FZL Filters	36,000.00		Define Timelines	<input type="checkbox"/>
	...EQIP-II/NITRO/3	Furniture and fittings	1,880,000.00		Define Timelines	<input type="checkbox"/>

8. To send the plan for revision approval click on 'Submit Plan for Revision Approval'

The screenshot shows the same web application interface as above. The 'Submit Revision For Approval' button in the top navigation bar is highlighted with a red box. The breadcrumb trail and main title are the same. The table below is identical to the previous screenshot, but the 'FZL Filters' row is no longer highlighted.

9. If the changes to the plan are within 20% then the plan will go to the Director of the institution for Approval
10. The Director can login and **go to Procurement-> Plan-> Approvals**, click on the Procurement Plan title.
11. To Approve the plan click on 'Approve Revision' to Reject the plan click on 'Reject Revision'
12. If the changes are between 20 to 50 % 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 50% 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.

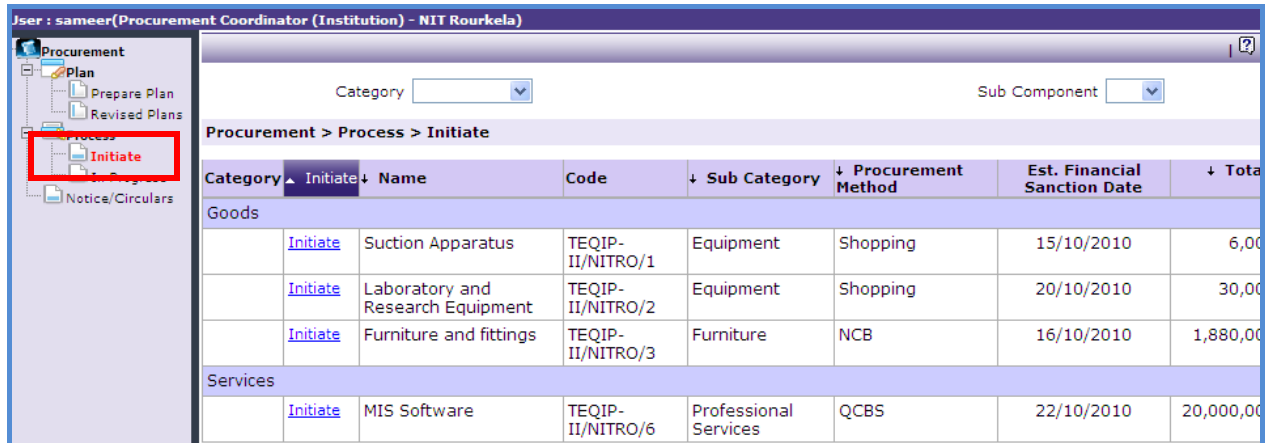


PROCUREMENTS

User Guide – Actual Procurements

Procurements

Once the plan is approved, actual procurements can be initiated. The approved procurements can be seen under **Procurement-> Process-> Initiate** from where they can be initiated.



User : sameer(Procurement Coordinator (Institution) - NIT Rourkela)

Category Sub Component

Procurement > Process > Initiate

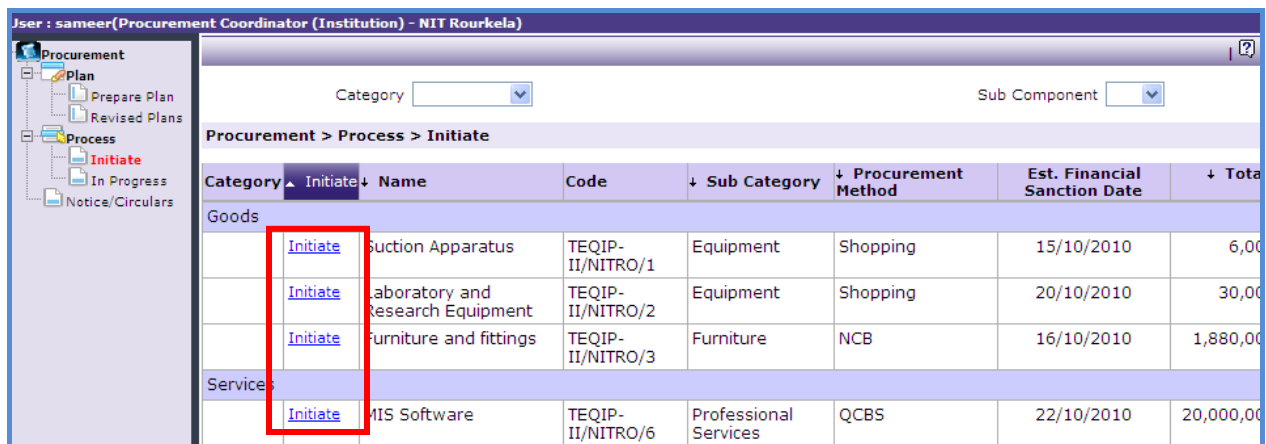
Category	Initiate	Name	Code	Sub Category	Procurement Method	Est. Financial Sanction Date	Total
Goods							
	Initiate	Suction Apparatus	TEQIP-II/NITRO/1	Equipment	Shopping	15/10/2010	6,00
	Initiate	Laboratory and Research Equipment	TEQIP-II/NITRO/2	Equipment	Shopping	20/10/2010	30,00
	Initiate	Furniture and fittings	TEQIP-II/NITRO/3	Furniture	NCB	16/10/2010	1,880,00
Services							
	Initiate	MIS Software	TEQIP-II/NITRO/6	Professional Services	QCBS	22/10/2010	20,000,00

There are two nodes under Process

- **Initiate** – This node is used to initiate procurement
- **In Progress** – Once procurement is initiated it will start to show under this node.

Initiate Procurements

To initiate procurement **go to Procurement-> Process-> Initiate**. Against each procurement there will be a link 'Initiate'.



User : sameer(Procurement Coordinator (Institution) - NIT Rourkela)

Category Sub Component

Procurement > Process > Initiate

Category	Initiate	Name	Code	Sub Category	Procurement Method	Est. Financial Sanction Date	Total
Goods							
	Initiate	Suction Apparatus	TEQIP-II/NITRO/1	Equipment	Shopping	15/10/2010	6,00
	Initiate	Laboratory and Research Equipment	TEQIP-II/NITRO/2	Equipment	Shopping	20/10/2010	30,00
	Initiate	Furniture and fittings	TEQIP-II/NITRO/3	Furniture	NCB	16/10/2010	1,880,00
Services							
	Initiate	MIS Software	TEQIP-II/NITRO/6	Professional Services	QCBS	22/10/2010	20,000,00

1. Click on this 'Initiate' link to initiate the procurement.
2. Enter the 'Actual Financial Sanction Date'.
3. For Goods, edit the Quantity, if required. For Works, edit the estimated cost, if required.

Save | Back | Help |

(* Mandatory)

Procurement > Process > Initiate

Enter 'Actual Financial Sanction Date'. You can edit 'Quantity' for items in case of 'Goods' or 'Total Est. Cost' for items in case of 'Works' or 'Total Est. Cost' for the package in case of 'Services'. Click on 'Save' to save changes. Now select the appropriate Procurement Method and click 'Move to Next Stage'.

Code:

Name: *

Description:

Category:

Sub Category:

Total Est. Cost: *

Est. Financial Sanction Date:

Actual Financial Sanction Date: *

Procurement Method: *

Is Proprietary:

Item Details

Help |

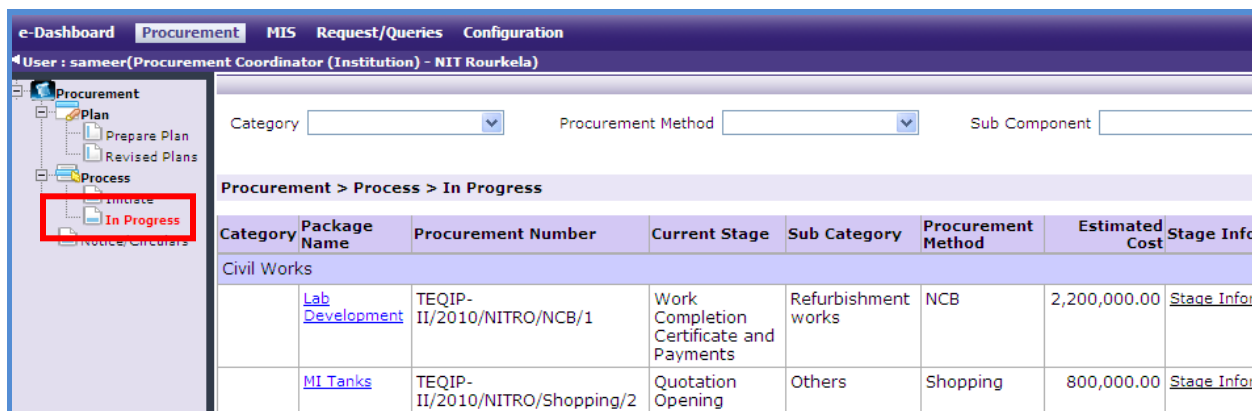
Item Details

Item Name	Description	Procuring Department	Quantity	Est. Cost/Unit	Total Est. Cost
ASDSA Suction Apparatus*	4*55 Cooling Suction	Chemical Engineer	12*	500	6000

4. Select the appropriate procurement method and Click 'Save'
5. Revise Timelines link will appear, click on the link will show a pop up. Dates in this popup will be auto populated based on the Procurement Method and 'Actual Financial Sanction Date'. These dates can be changed as per actual estimation.
6. Once saved a 'Move to Next Stage' link will appear. Click on this link, will display the **Guidelines** for the select method.
7. If the Guidelines are well understood Click on 'Move to Next Stage' this will initiate the procurement and the procurement will move to **in progress**.

In Progress Procurements

Go to Procurement-> Process-> In Progress. All the procurements which are **initiated** will be listed here.



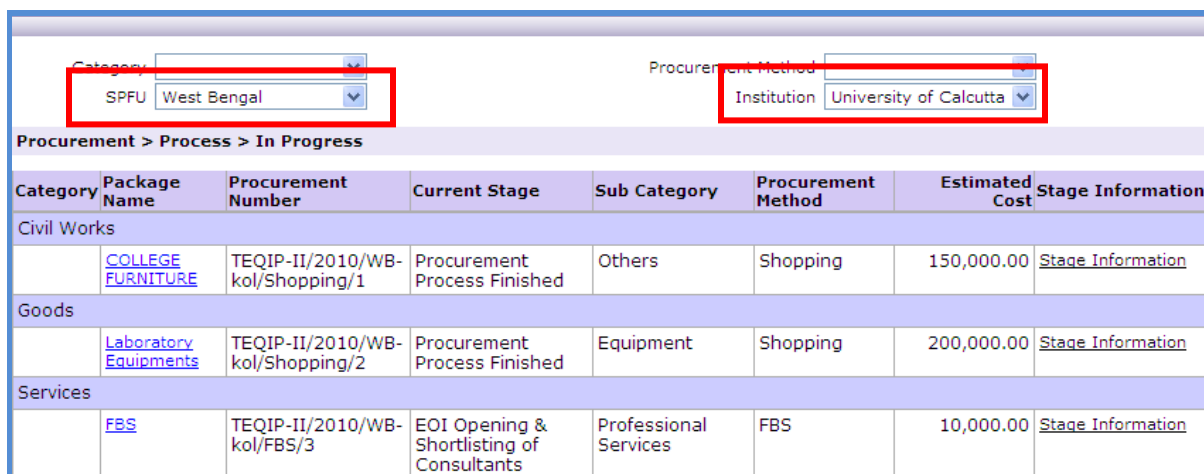
1. Click on the Package/ Service Name. This will open the procurement in its current stage.
2. Perform the action required for this stage and Click on 'Move to Next Stage'. Perform the required action for this stage and click on 'Move to Next Stage' and so on.
3. Thus procurement processes for the package/ service can be completed by performing all the required stages (steps).

Note: All the stages (steps) for each procurement method are described in Chapters 4 to 12.

Note: SPFU and NPIU can see the In-progress procurements of respective institutions.

SPFU/ NPIU user can go to Procurement-> Process-> In Progress. By default they will see their own In-Progress procurements.

The In-progress page has some filter as shown below;



By selecting the appropriate filters SPFU/ NPIU user can see the institution's

In-progress procurements.

- 1. Select the SPFU name in the SPFU filter this will display the SPFU's In-progress procurements.**
- 2. Select the institutions name in the Institutions filter this will display the In-progress procurements of the institution.**



SHOPPING METHOD

User Guide – Procurement Using Shopping Method

Shopping

Shopping Method can be used for procurement of 'Goods' as well as for procurement of 'Civil Works'. System will automatically allow selection of Shopping Method when the value-threshold is \leq USD 20,000 for Goods and $<$ USD 30, 000 for Civil Works.

Shopping Goods

To do procurement using Shopping Goods, **Go to Procurement-> Process-> In Progress.**

Category	Package Name	Procurement Number	Current Stage	Sub Category	Procurement Method	Estimated Cost	Stage Info
Civil Works	Lab Development	TEQIP-II/2010/NITRO/NCB/1	Work Completion Certificate and Payments	Refurbishment works	NCB	2,200,000.00	Stage Info
	MI Tanks	TEQIP-II/2010/NITRO/Shopping/2	Quotation Opening	Others	Shopping	800,000.00	Stage Info

1. Click on the package name that has shopping as the procurement method.
2. First stage of Shopping is '**Invitation Letter**'.

Package : Suction Apparatus(TEQIP-II/2010/NITRO/Shopping/3) Current Stage : Letter of Invitation

Use 'Supplier Details' Tab to add supplier. Click on Generate Invitation Letter link to generate the invitation letters.

Quotation Validity *(In days) Last Date & Time of Submission *(hh:mm)

Training Clause Testing/Installation Clause

Warranty *(In months) AMC

3. On the 'Invitation Letter' tab enter data in the following fields;
 - Quotation Validity Required (In days)
 - Last Date of Submission
 - Quotation submission time (hh:mm)
 - Training Clause
 - Testing/Installation Clause

- o Warranty
 - o AMC
4. Click 'Save'
 5. On the 'Items' sub-tab;

Package : Suction Apparatus(TEQIP-II/2010/NITRO/Shopping/3) Current Stage : Letter of Invitation

Pkg Details Invitation Letter Quotation Opening Quotation Evaluation Recomm. for Award Purchase Order GRN & Payments

Use 'Supplier Details' Tab to add supplier. Click on Generate Invitation Letter link to generate the invitation letters.

Quotation Validity *(In days) Last Date & Time of Submission 11:21* *(hh:mm)

Training Clause Testing/Installation Clause

Warranty *(In months) AMC

Purchase Committee (3) Questions (10) **Item Details (1)** Supplier Details (0)

Procuring Department	Item Name	Quantity	Estimated Cost
Chemical Engineering	ASDSA Suction Apparatus	12	6,000.00

a. Click 'Item Name', a pop up will be seen as shown below;

Save Close

(* Mandatory)

Item Information

Item Name ASDSA Suction Apparatus * Description 4*55 Cooling Suction Apparatus

Quantity 12 Estimated Cost 6000

Procuring Department Chemical Engineering Delivery Period (In Days)

Is Training Required Is Installation Required

Specifications

Place Of Delivery Installation Requirements (If Any)

- b. Enter data in the following fields;
 - o Is Training Required
 - o Is Installation Required
 - o Specifications – Click on search specification to get specifications from other items.
 - o Place Of Delivery
 - o Installation Requirements (If Any)
- c. Click 'Save'
- d. If there are more than one item then, repeat steps from a. to c.

6. On the 'Supplier Details' sub-tab;

Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3) Current Stage : Letter of Invitation

Pkg Details Invitation Letter Quotation Opening Quotation Evaluation Recomm. for Award Purchase Order GRN & Payments

Use 'Supplier Details' Tab to add supplier. Click on Generate Invitation Letter link to generate the invitation letters.

Quotation Validity *(In days) Last Date & Time of Submission 11:21 *(hh:mm)

Training Clause * Testing/Installation Clause *

Warranty *(In months) AMC *

Purchase Committee (3) Questions (10) Item Details (1) **Supplier Details (0)**

Supplier Name	EmailID	Phone Number	Is Invitation Sent	Delete
There are no items to show in this view.				

- a. Click 'Add', a pop up will be seen as shown below;

Save Save and Add Close Help

(* Mandatory)

Supplier Details NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3)

Supplier Name * Select Address *

City * State *

Supplier Source * Specify Source *

Pin Code * Phone Number *

Name Of Representative * Email ID *

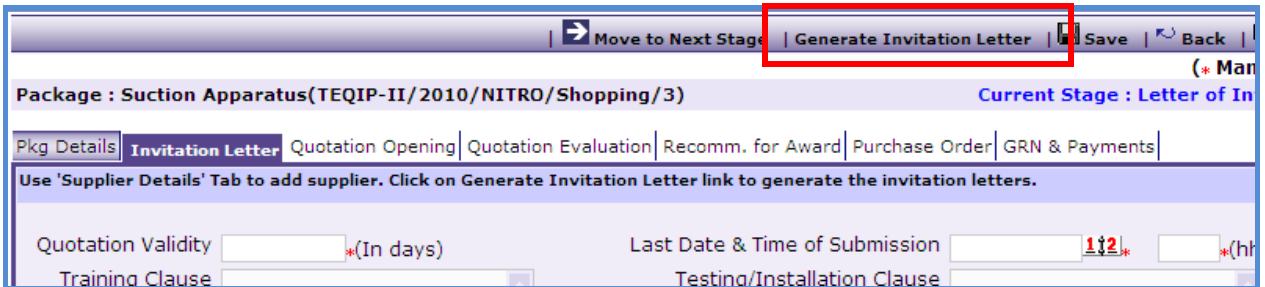
FAX Number PAN Number

TAN Number Tax Number

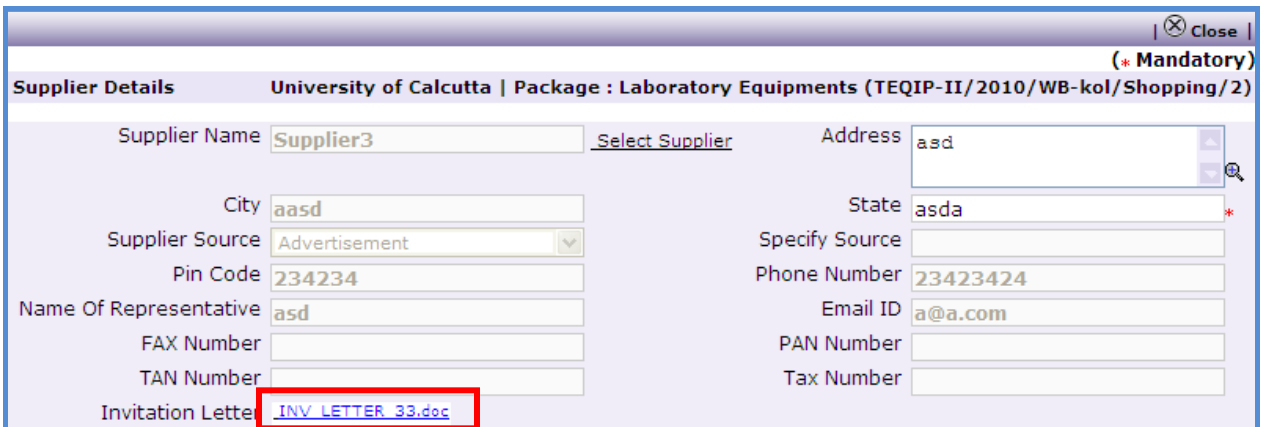
- b. Enter data in the following fields;

- Supplier Name – Click on Select Supplier to get the suppliers from existing list of suppliers.
- Address
- City
- State
- Supplier Source
- Specify Source – Only if 'Supplier Source' is others
- Email ID
- Pin Code

- o Name Of Representative
 - o Phone Number
 - o PAN Number
 - o TAN Number
 - o Tax Number
- c. Click 'Save'
- d. To add another Supplier repeat steps from a. to c.
- e. Once the supplier is added click on 'Generate Invitation letter' link.



- f. Invitation letter will get generated for all the suppliers in one-go. An email will be sent to all the suppliers automatically.
- g. To view/ print the generated invitation letters click on the supplier name. A link will be seen as shown in the below snapshot. Click on this link to view/ print the invitation letter.



- h. If the email is not send due to some technical issue. Then click on the supplier name.
- i. Click on the 'Send Mail' link.
- j. An email pop up will be shown. Click on 'Send' to send out the email to the supplier.

7. On the 'Payments' sub-tab;
- a. By default two Payment Terms will appear

- b. Click on the Payment Term to make changes, if any.
8. On the 'Question' sub-tab, additional evaluation questions can be added, if required.
 - a. Click 'Add', a pop up will be seen as shown below;

- b. Enter data in the following fields;
 - o Question
 - o Is Decision Making Question? – If the bidder is going to be marked as responsive/ non- responsive based on this question then 'Check' this box
 - o Non Responsive Value – Select the value (Yes/ No) based on which the bidder will become non- responsive. E.g. if the question is 'Does the Contractor have a local service center?' then the non- responsive value will be 'No'.

Note: Question should be formed in such a way that the answer is in 'Yes/ No' form. The newly added questions will appear during the Quotation Evaluation stage.

- c. Click 'Save'.
- d. To add another Question repeat steps from a. to c.
9. Once the required details are captured click on 'Move to Next Stage'. This will move the procurement to '**Quotation Opening**' stage.
10. On the 'Quotation Opening' tab click on 'Print Qtn. Opening Form'. This will open a form as shown below;

Package : Suction Apparatus(TEQIP-II/2010/NITRO/Shopping/3) Current Stage : Quotation Opening

Ensure all Suppliers are added in 'Supplier Details' Tab before entering Quotation Opening Data.
Upload signed copy of the Quotation Opening form in Documents Tab before you proceed to next step.

Print Quotation Opening Form | Enter Quotation Opening Data |

Quotation Opening Date *(hh:mm)

NIT Rourkela

Quotation Opening Form

Date:

Question	Kam Kam Trades	Shamal Groups	SNS Corp Ltd	4 :	5 :
Is Quotation Received?					
Quotation Received Date					
Is Quotation Duly Signed?					
Quotation Number					
Readout Price					
Quotation Validity					

11. 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) can be seen on this form against which quotation opening details can be mentioned. There are 3 extra columns provided to accommodate names of any new suppliers who have submitted their quotations directly.
12. If there were new supplier then their details should be put in the system using the supplier details tab (to add these new suppliers, similar steps should be followed as mentioned in Invitation Letter stage).
13. Quotation Opening data is required to be feed in the system. Enter the following fields;
 - a. Quotation Opening Date
 - b. Quotation Opening Time
 - c. Quotation MoM
 - d. Click 'Save'
 - e. Click on the 'Enter Quotation Opening Data' link. This will show a pop up to enter the Responsiveness Criteria.

Ensure all Suppliers are added in 'Supplier Details' Tab before entering Quotation Opening Data.
Upload signed copy of the Quotation Opening form in Documents Tab before you proceed to next step.

Print Quotation Opening Form | Enter Quotation Opening Data |

Quotation Opening Date 25/10/2010 12:40*(hh:mm)

Supplier Name

NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3) Current Stage : Quotation Opening

Red indicates Non responsive.

Name	Question	User Response
Kam Kam Trades	Quotation Details	
	Is Quotation Received?	Yes*
	Quotation Received Date	22/10/2010 12:40*
	Is Quotation Duly Signed?	Yes*
	Quotation Number	23N23*

f. Enter the details and Click 'Save'.

14. 'Quotation Details' link will appear against the responsive suppliers. This link is provided to enter item wise price break up, if required.

15. On the 'Documents' sub-tab, click 'Add';

Supplier Details (3) Documents

Add | Delete | Select All | Help

Uploaded By	Uploaded Date	Delete
sameer	17/10/2010	<input type="checkbox"/>

Select Document to be Uploaded :
Browse...

Document Category :
Quotation Opening

Upload | Close

a. Select 'Quotation Opening' Category

b. Browse and upload the document

16. Click on 'Move to Next Stage'. This will move the procurement to '**Quotation Evaluation**' stage.

17. On the 'Quotation Evaluation' tab click on 'Print Qtn. Evaluation Form'. This form can be used during Quotation Evaluation.


Package : Suction Apparatus(TEQIP-II/2010/NITRO/Shopping/3) Current Stage : Quotation Evaluation and Award

Pkg Details | Invitation Letter | Quotation Opening | **Quotation Evaluation** | Recomm. for Award | Purchase Order | GRN & Payments

L1 Supplier will be automatically selected and displayed by the system once the Evaluation data is filled.

| [Print Quotation Evaluation Form](#) | [Enter Quotation Evaluation Data](#) |

Lowest Responsive Supplier after evaluation :

 NIT Rourkela

Quotation Evaluation Form

Date:

Question	Kam Kam Trades	Shamal Groups	SNS Corp Ltd	4 :	5 :
Are the Delivery terms as specified?					
Are the Payment Terms Agreed?					
Is Training Included?					
Is Testing/ Commissioning/ Installation included?					
Is the Quantity as specified?					
Is the Place of Delivery as specified?					
Is the Quotation Technically Responsive?					

18. After Quotation Evaluation is done, the data is required to be feed in the system.

- a. Click on the 'Quotation Evaluation' link. This will show a pop up to enter the Comparative Statement.

Pkg Details | Invitation Letter | Quotation Opening | **Quotation Evaluation** | Recomm. for Award | Purchase Order | GRN & Payments

L1 Supplier will be automatically selected and displayed by the system once the Evaluation data is filled.

| [Print Quotation Evaluation Form](#) | [Enter Quotation Evaluation Data](#) |

Lowest Responsive Supplier

Quotation Evaluation - Windows Internet Explorer

Supplier Name:

NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3) Current Stage : Quotation Evaluation and Award of Contract

Red indicates Non responsive.

Name	Question	User Response
Kam Kam Trades	Quotation Details	
	Are the Delivery terms as specified?	<input type="text"/> *
	Are the Payment Terms Agreed?	<input type="text"/> *
	Is Training Included?	<input type="text"/> *
	Is Testing/ Commissioning/ Installation included?	<input type="text"/> *
	Is the Quantity as specified?	<input type="text"/> *
	Is the Place of Delivery as specified?	<input type="text"/> *
	Is the Quotation Technically Responsive?	<input type="text"/>

19. Once Comparative Statement data is save the system will show the lowest evaluated responsive supplier (L1).
20. On the 'Documents' sub-tab;
 - c. Click 'Add', Select Quotation Evaluation category
 - d. Browse and upload the document
21. Click on 'Move to Next Stage'. This will take the procurement to '**Recommendation for Award**' stage.

The screenshot shows the 'Recommendation for Award' stage of a procurement process. The interface includes a navigation bar with tabs for 'Pkg Details', 'Invitation Letter', 'Quotation Opening', 'Quotation Evaluation', 'Recomm. for Award' (selected), 'Purchase Order', and 'GRN & Payments'. The current stage is labeled 'Current Stage : Recommendation for Award of Contract (* Mandatory)'. The 'L1 Supplier' dropdown menu is set to 'SNS Corp Ltd'. Below this, there is a 'Recommendation Comments' field with a search icon and a mandatory asterisk.

22. If the lowest evaluated responsive supplier (L1) is not acceptable by the committee then another supplier can be selected in this stage. If another supplier is selected then enter the comments in the comments field and click 'Save'.
23. On the 'Documents' sub-tab the evaluation report can be uploaded under the Evaluation Report category.
24. Click on 'Move to Next Stage'. This will take the procurement to '**Purchase Order**' stage.
25. Click on 'Generate PO'. In the Pop up enter the following fields;
 - a. PO date
 - b. VAT %
 - c. Octroi and Others
 - d. Basic Cost Per Unit – only if changed.

Package : Suction Apparatus(TEQIP-II/2010/NITRO/Shopping/3) Current Stage : PO Generation

Pkg Details | Invitation Letter | Quotation Opening | Quotation Evaluation | Recomm. for Award | **Purchase Order** | GRN & Payments

Click on 'Generate PO' link to enter the PO details and print the PO.
Upload verified Purchase Order in 'Documents' Tab under 'Purchase Order' category.

[Generate PO](#)

PO# Generated On 112

PO Generation - Windows Internet Explorer

Print PO | Save | Close | Help

(* Mandatory)

PO Generation NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3)

Supplier Name SNS Corp Ltd PO #

PO Date VAT %

Octroi And Others

Evaluated Cost 6000 Total Cost 6000

1. Quotation

2. Quotation

PO Details NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3)

Item Name	Description	Qty	Basic Cost Per Unit	Total Basic Cost
ASDSA Suction Apparatus *	4*55 Cooling Suction Apparatus Teoid rubber	12	500	6000

26. Click 'Save'

27. Click 'Print PO'. This will print the PO.

28. PO can be uploaded in the 'Documents' tab.

29. Click on 'Move to Next Stage'. This will take the procurement to '**GRN & Payments**' stage. Whenever Goods are received the details can be captured in this stage.

30. On the '**GRN**' sub-tab;

Package : Suction Apparatus(TEQIP-II/2010/NITRO/Shopping/3) Current Stage : GRN - Payment Tracking and Contract Management

Pkg Details | Invitation Letter | Quotation Opening | Quotation Evaluation | Recomm. for Award | Purchase Order | **GRN & Payments**

Use 'GRN' Tab to enter Good Received Notes.

Use 'Payments' Tab to track payments.

Supplier Details (3) | **GRN (0)** | Payments (2) | Documents

Add | Help

Supplier Name	Date Of Supply	Delete
There are no items to show in this view.		

a. Click on 'Add', a pop up will be seen as shown below;

Goods Received Note NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3) (* Mandatory)

Note : Before generating Asset Register please make sure all the received items are entered. Asset Register once generated can not be generated again and No changes to this GRN will be allowed.

Supplier Name SNS Corp Ltd Date Of Supply

Item Code	Item Name	Comments	Received Quantity	Stock Register Name	Page No.	Serial No.	Item Distribution	Delete
Total Records :0								

b. Enter data in the following fields;

- o Date of Supply
- o In the Items section click 'Add' and enter the following fields;

Goods Received Note NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3) (* Mandatory)

Note : Before generating Asset Register please make sure all the received items are entered. Asset Register once generated can not be generated again and No changes to this GRN will be allowed.

Supplier Name SNS Corp Ltd Date Of Supply

Item Code	Item Name	Comments	Received Quantity	Stock Register Name	Page No.	Serial No.	Item Distribution	Delete
Total Records :1								

- Item Code – This code will be used when generating asset numbers
- Item Name
- Comments
- Received Quantity
- Stock Resistor Name
- Page No.
- Serial No.

c. To add another Item click add and enter the data as above.

d. Click 'Save'

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

Received Note NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3)

Before generating Asset Register please make sure all the received items are entered.
Asset Register once generated can not be generated again and No changes to this GRN will be allowed.

Supplier Name: SNS Corp Ltd * Date Of Supply: 27/10/2010 11:21*

GRN Document: Browse...

Asset Document: Browse...

GRN Details (1)

Add | Delete | Select All | Clear All | Help

Item Code	Item Name	Comments	Received Quantity	Stock Register Name	Page No.	Serial No.	Item Distribution	Delete
*	ASDSA Suction App: *		20*	23M23	23	354664	Item Distribution	<input type="checkbox"/>

Total Records : 1

- f. Click on the link to get a pop up. In this pop up, enter the Quantity supplied to each department.
- g. To Generate the GRN Report click on 'Print GRN'

Print GRN | Print Asset Register | Save | Close | Help

Received Note NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3)

Before generating Asset Register please make sure all the received items are entered.
Asset Register once generated can not be generated again and No changes to this GRN will be allowed.

Supplier Name: SNS Corp Ltd * Date Of Supply: 27/10/2010 11:21*

GRN Document: Browse...

Asset Document: Browse...

GRN Details (1)

Add | Delete | Select All | Clear All | Help

Item Code	Item Name	Comments	Received Quantity	Stock Register Name	Page No.	Serial No.	Item Distribution	Delete
*	ASDSA Suction App: *		20*	23M23	23	354664	Item Distribution	<input type="checkbox"/>

- h. The GRN Report can be uploaded using the Browse function. Once uploaded, Link will appear as shown below.

Print GRN | Print Asset Register | Save | Close | Help

Received Note NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3)

Before generating Asset Register please make sure all the received items are entered.
Asset Register once generated can not be generated again and No changes to this GRN will be allowed.

Supplier Name: SNS Corp Ltd * Date Of Supply: 27/10/2010 11:21*

GRN Document: Browse... [Paks.txt](#)

Asset Document: Browse...

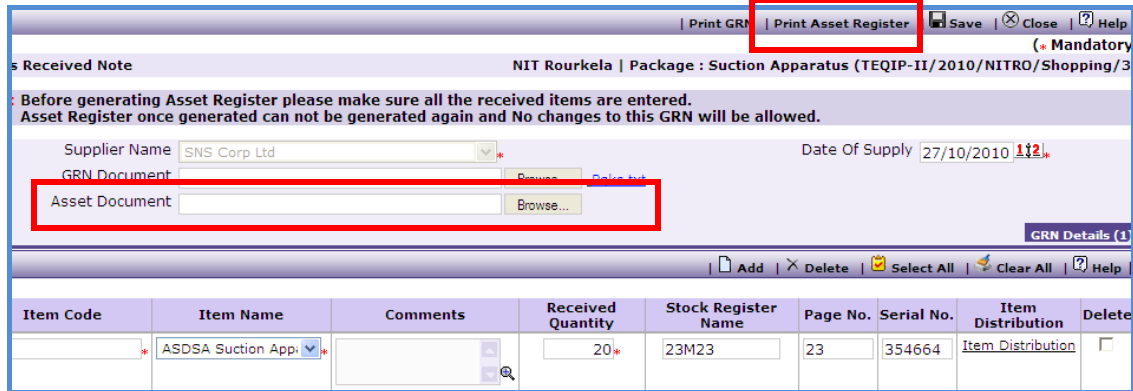
GRN Details (1)

Add | Delete | Select All | Clear All | Help

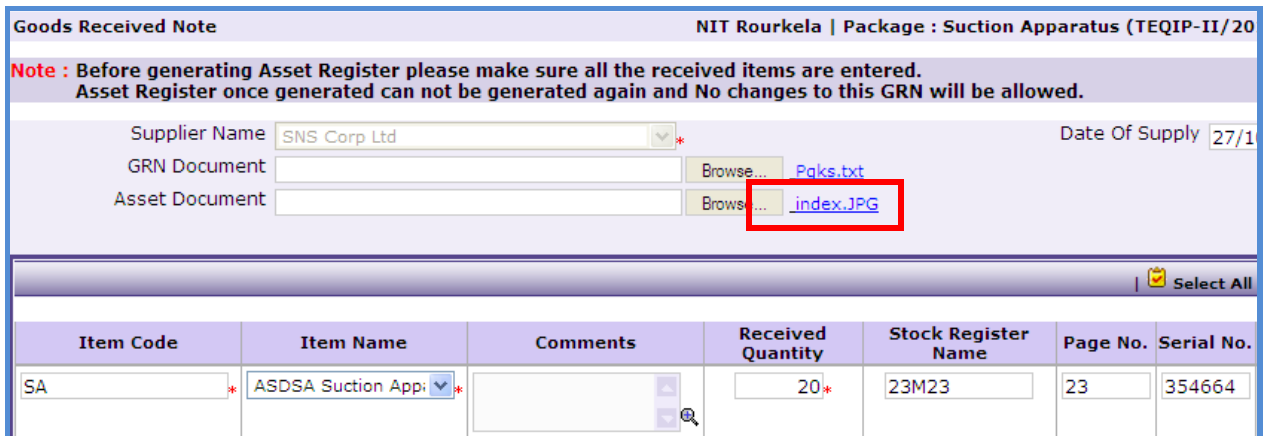
Item Code	Item Name	Comments	Received Quantity	Stock Register Name	Page No.	Serial No.	Item Distribution	Delete
*	ASDSA Suction App: *		20*	23M23	23	354664	Item Distribution	<input type="checkbox"/>

- i. Report can be downloaded by clicking on the link.
- j. To Generate Asset Register click on 'Print Asset Register'.

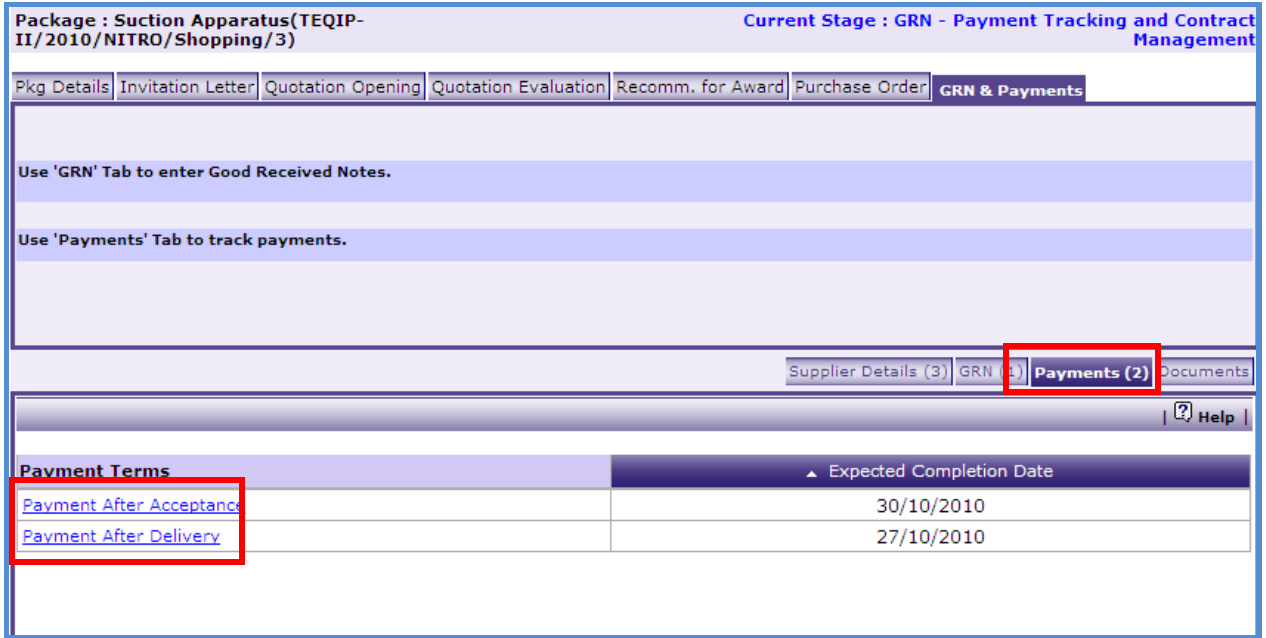
Note: Asset Register can be generated only once. System will give a warning message to confirm that all the items have been added etc. Once Asset Register is generated no changes can be made to that GRN record.



- k. Asset Register excel will have three columns;
 - o Unique Number – Will be Auto generated
 - o Model Number – To be entered by the user
 - o Serial Number - To be entered by the user
- l. Once the Asset Register is filled up it can be uploaded using the Browse function
- m. Once uploaded, Link will appear as shown below.



- n. Asset Register can be downloaded by clicking on the link.
 - o. To add another record for GRN repeat steps from a. to o.
31. Payment details can be captured on the **'Payments'** sub-tab;



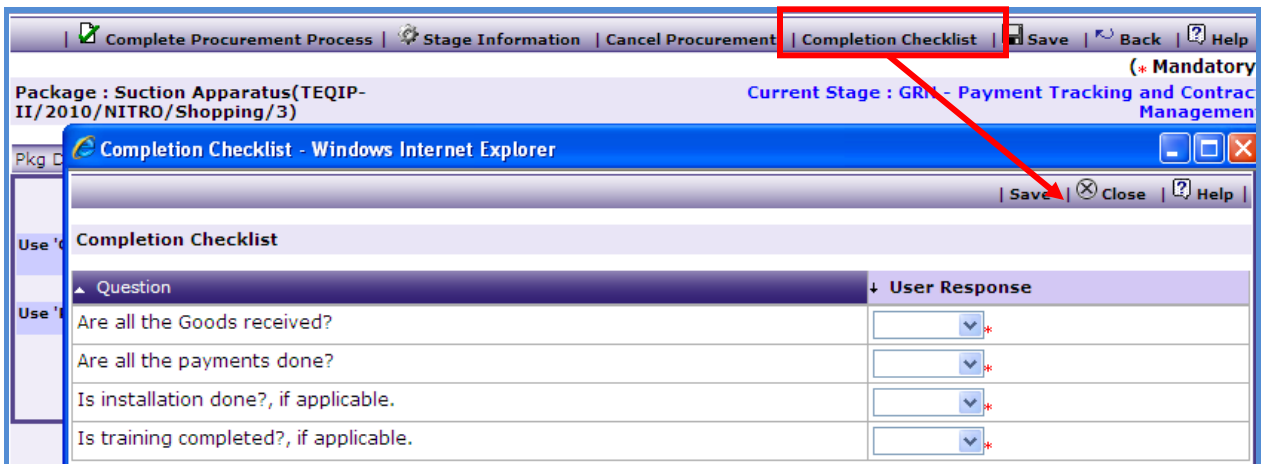
a. Click on the Payment Term and enter data in the following fields;

- o Actual Completion Date
- o Payment Date
- o Cheque/Draft Number
- o Amount
- o Liquidated Damages Amount
- o Comments

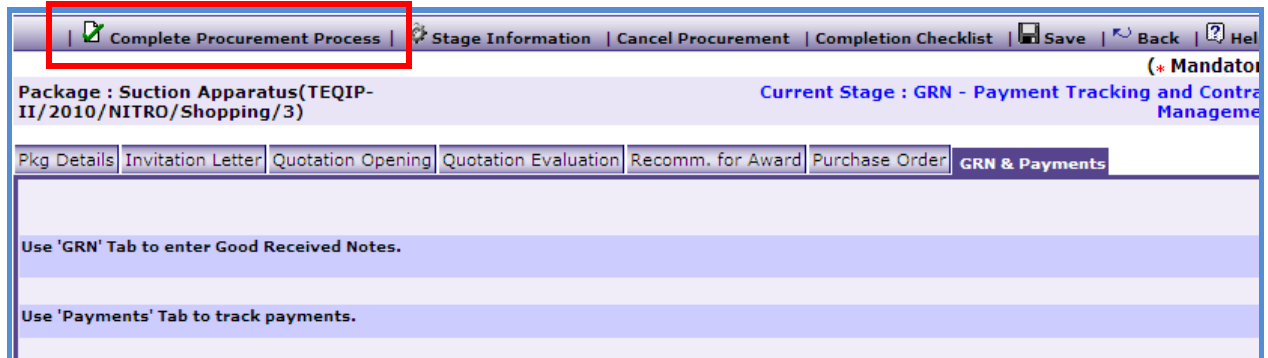
b. Click 'Save'

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

32. 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 as shown below;



33. Fill in the completion checklist then click on 'Complete Procurement Process' this will complete the procurement for that Package.

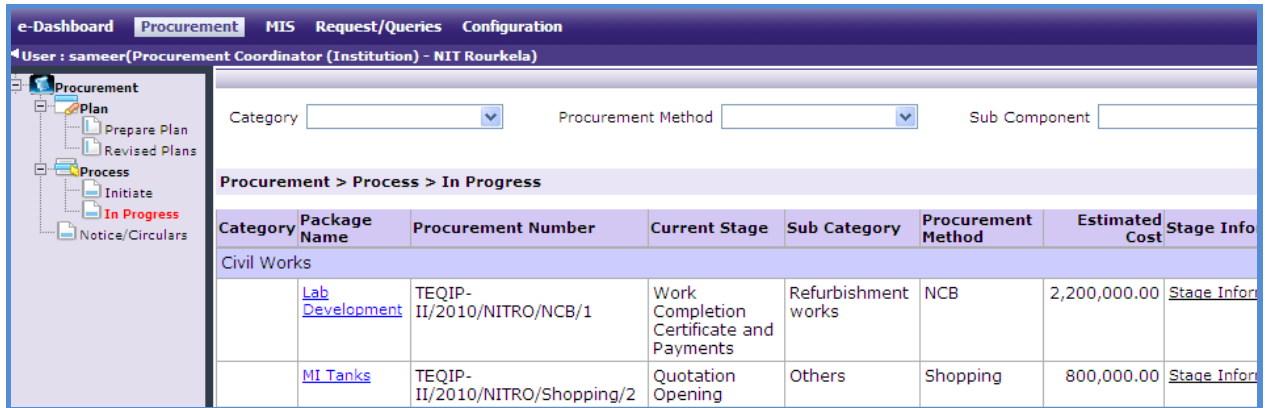


The screenshot displays the PMSS v1.0 interface. At the top, a navigation bar contains several buttons: 'Complete Procurement Process' (highlighted with a red box), 'Stage Information', 'Cancel Procurement', 'Completion Checklist', 'Save', 'Back', and 'Help'. Below the navigation bar, the package details are shown: 'Package : Suction Apparatus(TEQIP-II/2010/NITRO/Shopping/3)' and 'Current Stage : GRN - Payment Tracking and Contract Management'. A series of tabs are visible: 'Pkg Details', 'Invitation Letter', 'Quotation Opening', 'Quotation Evaluation', 'Recomm. for Award', 'Purchase Order', and 'GRN & Payments'. The 'GRN & Payments' tab is currently selected. Below the tabs, there are two instructional messages: 'Use 'GRN' Tab to enter Good Received Notes.' and 'Use 'Payments' Tab to track payments.'

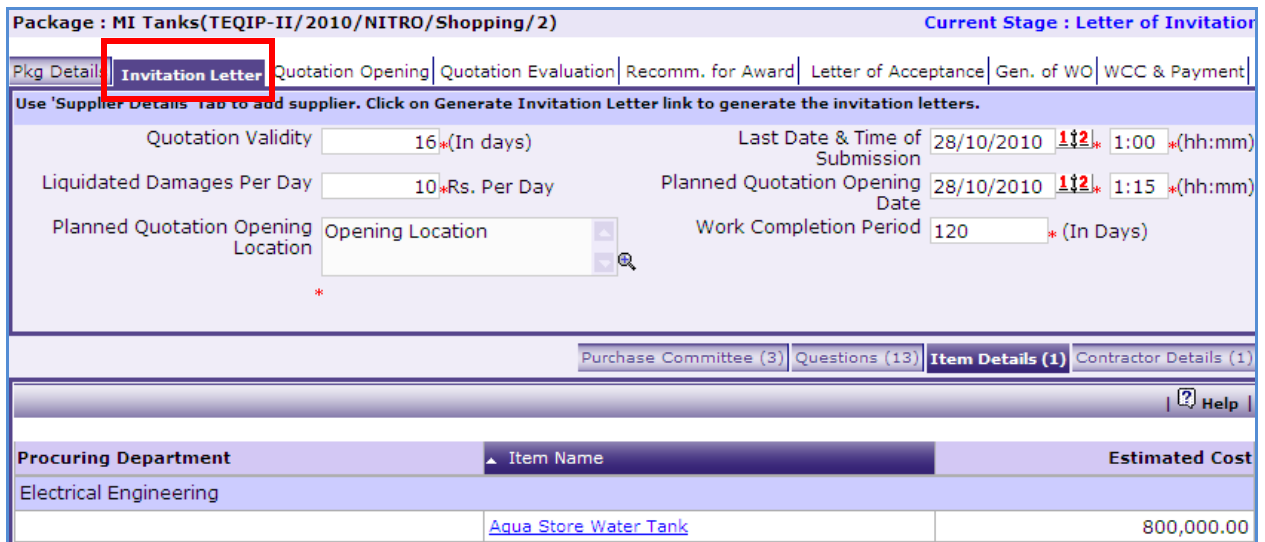
END – Shopping Goods

Shopping Works

To do procurement using Shopping Works, **Go to Procurement-> Process-> In Progress.**



1. Click on the package name that has shopping as the procurement method.
2. First stage of Shopping is 'Invitation Letter'.



3. On the 'Invitation Letter' tab enter data in the following fields;
 - o Quotation Validity Required (In days)
 - o Liquidated Damages Per Day
 - o Last Date of Submission
 - o Quotation Submission Time (hh:mm)
 - o Planned Quotation Opening Date
 - o Planned Quotation Opening Time (hh:mm)
 - o Planned Quotation Opening Location

- Work Completion Period
4. Click 'Save'
 5. On the 'Items' sub-tab;

Package : MI Tanks (TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Letter of Invitation

Pkg Details | **Invitation Letter** | Quotation Opening | Quotation Evaluation | Recomm. for Award | Letter of Acceptance | Gen. of WO | WCC & Payment

Use 'Supplier Details' Tab to add supplier. Click on Generate Invitation Letter link to generate the invitation letters.

Quotation Validity *(In days) Last Date & Time of Submission 28/10/2010 *(hh:mm)

Liquidated Damages Per Day *Rs. Per Day Planned Quotation Opening Date 28/10/2010 *(hh:mm)

Planned Quotation Opening Location Work Completion Period 120 *(In Days)

Purchase Committee (3) | Questions (13) | **Item Details (1)** | Contractor Details (1)

Help

Procuring Department	Item Name	Estimated Cost
Electrical Engineering	Aqua Store Water Tank	800,000.00

- a. Click 'Item Name', a pop up will be seen as shown below;

Save | Close

(* Mandatory)

Item Information

Item Name * Description

Quantity Estimated Cost

Procuring Department

[Search Specification](#)

Specifications

- b. Enter 'Specifications' – Click on search specification to get specifications from other items.
 - c. Click 'Save'
 - d. If there are more than one item then, repeat steps from a. to c.
6. On the 'Contractor Details' sub-tab;

Package : MI Tanks (TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Letter of Invitation

Pkg Details **Invitation Letter** | Quotation Opening | Quotation Evaluation | Recomm. for Award | Letter of Acceptance | Gen. of WO | WCC & Payment

Use 'Supplier Details' Tab to add supplier. Click on Generate Invitation Letter link to generate the invitation letters.

Quotation Validity *(In days) Last Date & Time of Submission 28/10/2010 *(hh:mm)

Liquidated Damages Per Day *Rs. Per Day Planned Quotation Opening Date 28/10/2010 *(hh:mm)

Planned Quotation Opening Location Work Completion Period *(In Days)

Purchase Committee (3) | Questions (13) | Item Details (1) | **Contractor Details (1)**

Add | Delete | Select All | Clear All | Help

Contractor Name	EmailID	Phone Number	Is Invitation Sent	Delete
-----------------	---------	--------------	--------------------	--------

a. Click 'Add', a pop up will be seen as shown below;

Save | Save and Add | Close | Help

Contractor Details NIT Rourkela | Package : MI Tanks (TEQIP-II/2010/NITRO/Shopping/2)

Contractor Name * Select Address

Contractor

City * State *

Contractor Source * Specify Source

Pin Code * Phone Number *

Name Of Representative * Email ID *

FAX Number

TAN Number

PAN Number

Tax Number

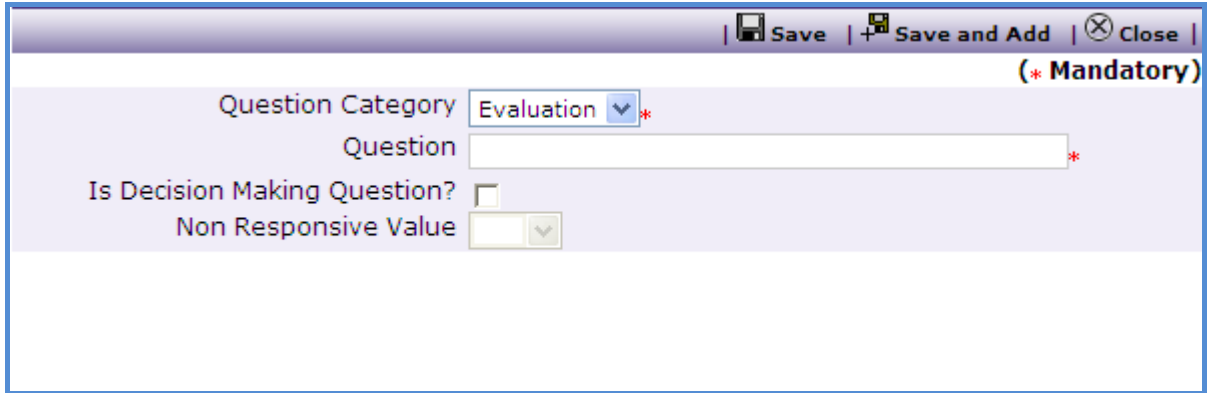
b. Enter data in the following fields;

- Contractor Name – Click on Select Contractor to get the contractor from existing list of contractors.
- Address
- City
- State
- Contractor Source
- Specify Source – Only if 'Contractor Source' is others
- Email ID
- Pin Code
- Name Of Representative
- Phone Number
- Fax Number
- PAN Number
- TAN Number
- Tax Number

- c. Click 'Save'
- d. To add another Contractor repeat steps from a. to c.
- e. Once the Contractors are added click on 'Generate Invitation letter' link.

- f. Invitation letter will get generated for all the contractors in one-go. An email will be sent to all the contractors automatically.
- g. To view/ print the generated invitation letters click on the contractor name. A link will be seen as shown in the below snapshot. Click on this link to view/ print the invitation letter.

- h. If the email is not send due to some technical issue. Then Click on the contractor name.
 - i. Click on the 'Send Mail' link.
 - j. An email pop up will be shown. Click on 'Send' to send out the email to the supplier.
7. On the 'Question' sub-tab, additional evaluation questions and additional post qualification questions can be added, if required.
 - a. Click 'Add', a pop up will be seen as shown below;



The screenshot shows a software interface for adding a question. At the top right, there are buttons for 'Save', 'Save and Add', and 'Close'. Below these is a red asterisk and the text '(* Mandatory)'. The form contains the following fields:

- Question Category: A dropdown menu with 'Evaluation' selected.
- Question: An empty text input field.
- Is Decision Making Question?: A checkbox that is currently unchecked.
- Non Responsive Value: A dropdown menu.

b. Enter data in the following fields;

- Question Category – Whether it is Evaluation Question or Post Qualification Question.
- Question
- Is Decision Making Question? – If the bidder is going to be marked as responsive/ non- responsive based on this question then 'Check' this box
- Non Responsive Value – Select the value (Yes/ No) based on which the bidder will become non- responsive. E.g. if the question is 'Does the Contractor have a local service center?' then the non- responsive value will be 'No'.

Note: Question should be formed in such a way that the answer is in 'Yes/ No' form. The newly added questions will appear during the Quotation Evaluation stage or Post Qualification Stage based on the question category.

c. Click 'Save'.

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

8. Once the required details are captured click on 'Move to Next Stage'. This will move the procurement to '**Quotation Opening**' stage.
9. On the 'Quotation Opening' tab click on 'Print Quotation Opening Form'. This will open a form as shown below;

Package : MI Tanks(TEQIP-II/2010/NITRO/Shopping/2) Current Stage

Pkg Details | Invitation Letter | **Quotation Opening** | Quotation Evaluation | Recomm. for Award | Letter of Acceptance | Gen. of W

Ensure all Contractors are added in 'Contractor Details' Tab before entering Quotation Opening Data.
 Upload signed copy of the Quotation Opening form in Documents Tab before you proceed to next step.

| [Print Quotation Opening Form](#) | [Enter Quotation Opening Data](#) |

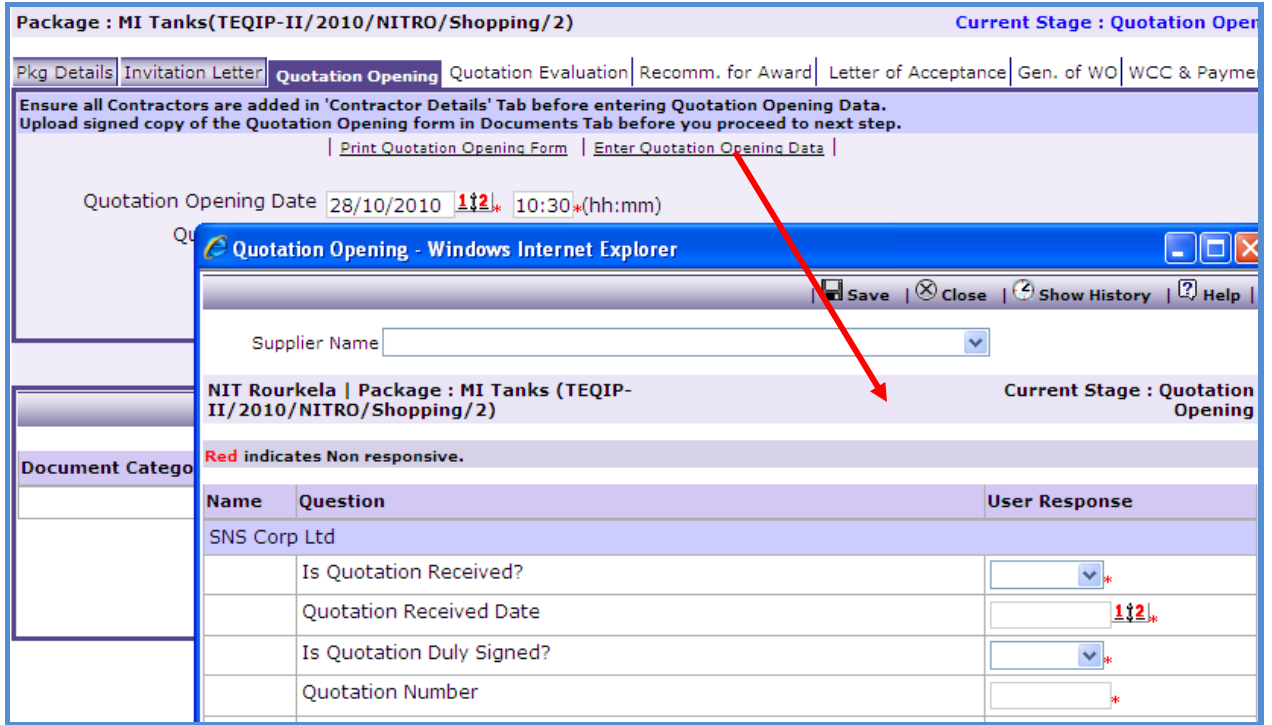
NIT Rourkela

Quotation Opening Form

Date:

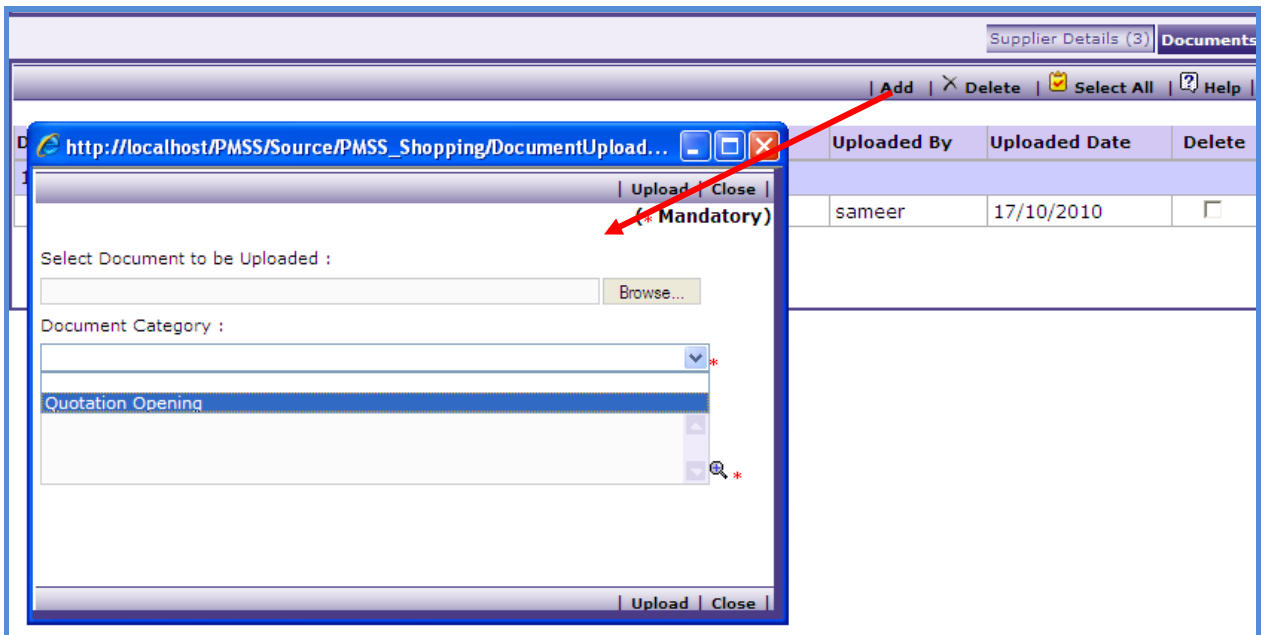
Question	SNS Corp Ltd	2 :	3 :	4 :
Is Quotation Received?				
Quotation Received Date				
Is Quotation Duly Signed?				
Quotation Number				
Quotation Validity				
Readout Price				
Is the Signed BOQ submitted?				
Is Estimated Time of Completion as specified?				

10. 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) can be seen on this form against which quotation opening details can be mentioned. There are 3 extra columns provided to accommodate names of any new Contractors who have submitted their quotations directly.
11. If there were new contractors then their details should be put in the system using the contractor details tab (to add these new contractors, similar steps should be followed as mentioned in Invitation Letter stage).
12. After Quotation Opening is done, the data is required to be feed in the system. Enter the following fields;
 - a. Quotation Opening Date
 - b. Quotation Opening Time
 - c. Quotation MoM
 - d. Click 'Save'
 - e. Click on the 'Enter Quotation Opening Data' link. This will show a pop up to enter the Responsiveness Criteria.



f. Enter the details and Click 'Save'.

13. On the 'Documents' sub-tab, click 'Add';



e. Select 'Quotation Opening' Category

f. Browse and upload the document

14. Click on 'Move to Next Stage'. This will move the procurement to 'Quotation Evaluation' stage.


15. On the 'Quotation Evaluation' tab click on 'Print Quotation Evaluation Form'. This form can be used during Quotation Evaluation.

Package : MI Tanks(TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Quotation Evaluation

Pkg Details | Invitation Letter | Quotation Opening | **Quotation Evaluation** | Recomm. for Award | Letter of Acceptance | Gen.

L1 Contractor will be automatically selected and displayed by the system once the Evaluation data is filled.
Click 'Perform Post Qualification' to perform Post Qualification for selected Contractor .

| [Print Quotation Evaluation Form](#) | [Enter Quotation Evaluation Data](#) |

Lowest Selected Contractor:  **NIT Rourkela**

Quotation Evaluation Form

Date: _____

Question	Kali Crops	SNK Konar	SNS Corp Ltd	4 :	5 :
Are the Delivery terms as specified?					
Are the Payment Terms Agreed?					
Is unconditional discount offered?					
Arithmetical errors					
Evaluated Price					
Comments					

16. After Quotation Evaluation is done, the data is required to be feed in the system.


- a. Click on the 'Enter Quotation Evaluation Data' link. This will show a pop up to enter the Comparative Statement.

Package : MI Tanks(TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Quotation Evaluation and Award of Co

Pkg Details | Invitation Letter | Quotation Opening | **Quotation Evaluation** | Recomm. for Award | Letter of Acceptance | Gen. of WO | WCC & Pay

L1 Contractor will be automatically selected and displayed by the system once the Evaluation data is filled.
Click 'Perform Post Qualification' to perform Post Qualification for selected Contractor .

| [Print Quotation Evaluation Form](#) | [Enter Quotation Evaluation Data](#) |

Lowest Responsive Contractor after evaluation :
Selected Contract  **Quotation Evaluation - Windows Internet Explorer**

Supplier Name:

NIT Rourkela | Package : MI Tanks (TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Quotation Evaluation and Award of Contr

Red indicates Non responsive.

Name	Question	User Response
Kali Crops	Quotation Details	
	Are the Delivery terms as specified?	<input type="text"/> *
	Are the Payment Terms Agreed?	<input type="text"/> *
	Is unconditional discount offered?	<input type="text"/> *
	Arithmetical errors	<input type="text"/> *

17. Once Comparative Statement data is save the system will show the lowest evaluated responsive supplier (L1).

18. A link, 'Perform Post Qualification' will be seen against L1;

Package : MI Tanks(TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Quotation Evaluation and Award of Contract

Pkg Details Invitation Letter Quotation Opening **Quotation Evaluation** Recomm. for Award Letter of Acceptance Gen. of WO WCC & Payment

L1 Contractor will be automatically selected and displayed by the system once the Evaluation data is filled.
Click 'Perform Post Qualification' to perform Post Qualification for selected Contractor .

| [Print Quotation Evaluation Form](#) | [Enter Quotation Evaluation Data](#) |

Lowest Responsive Contractor after evaluation : Kali Crops
Selected Contractor for Post Qualification : Kali Crops [Perform Post Qualification](#)

a. Click on the link to get a popup as shown below;

Save Close Show History Help

NIT Rourkela | Package : MI Tanks (TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Quotation Evaluation and Award of Contract

Red indicates Non responsive.

Name	Question	User Response
Kali Crops	Quotation Details	
	Is the Total Monetary Value of construction in the last 3 years Received?	<input type="text"/> *
	Is the Income Tax Certificate Received?	<input type="text"/> *
	Is the Financial Standing Report Received?	<input type="text"/> *
	Is the Litigation Report Received?	<input type="text"/> *
	Has the Contractor Satisfactorily completed at least 1 similar work of value not less than 80% of estimated contract value in less than 3 years?	<input type="text"/> *
	Does the Contractor have a Valid Electrical License?	<input type="text"/> *
	Does the Contractor have a Valid Sanitary Work License?	<input type="text"/> *

b. Fill in the response for the selected Contractor

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

d. Repeat the Post Qualification process for this Contractor.

19. On the 'Documents' sub-tab;

a. Click 'Add', select the 'Bid Evaluation' Category

b. Browse and upload the document

20. Click on 'Move to Next Stage'. This will take the procurement to '**Recommendation for Award**' stage.

Package : MI Tanks(TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Recommendation for Award of Contract

Pkg Details | Invitation Letter | Quotation Opening | Quotation Evaluation | **Recomm. for Award** | Letter of Acceptance | Gen. of WO | WCC & Payment

L1 Contractor: Kali Crops

Recommendation Comments:

21. If the lowest evaluated responsive contractor (L1) is not acceptable by the committee then another contractor can be selected in this stage. If another contractor is selected then enter the comments in the 'Comments' field and click 'Save'.

22. Click on 'Move to Next Stage'. This will take the procurement to 'Letter of Acceptance' stage.

Package : MI Tanks(TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Letter of Acceptance

Pkg Details | Invitation Letter | Quotation Opening | Quotation Evaluation | Recomm. for Award | **Letter of Acceptance** | Gen. of WO | WCC & Payment

Performance Security Amount: 3000*

Maintenance Period Expiry Date: 01/12/2011

Click on 'Generate Acceptance Letter' link to generate the acceptance letter.
Upload verified acceptance letter in the 'Documents' Tab under 'Acceptance Letter' category.

[Generate Acceptance Letter](#)

- a. Enter the Performance Security Amount
- b. Enter Maintenance Period Expiry Date and
- c. Click on 'Generate Acceptance Letter'. This will generate the Acceptance Letter.

23. Click on 'Move to Next Stage'. This will take the procurement to 'Gen of WO' stage.

Package : MI Tanks(TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Generation of Work Order

Pkg Details | Invitation Letter | Quotation Opening | Quotation Evaluation | Recomm. for Award | Letter of Acceptance | **Gen. of WO** | WCC & Payment

Contract Start Date: 30/10/2010

Work Start Date: 30/10/2010

Work Completion Date: 28/02/2011

Verify that payment terms are correctly defined under Payments tab.
Click on 'Generate WO' link to generate the WO. Upload verified work order in 'Documents' tab under 'Work Order' category.

[Generate WO](#)

Contractor Details (3) | **Payments (2)** | Documents

Add | Delete | Select All | Help

Payment Term	Expected Completion Date	Expected Completion Period	Payment Percentage	Delete
Payment After delivery	01/01/2011	30	40.00	<input type="checkbox"/>
Payment after final check	28/02/2011	60	60.00	<input type="checkbox"/>

- a. Enter Contract Start Date
- b. Enter Work Start Date
- c. Enter Work Completion Date and
- d. Click on 'Generate WO'. This will generate the Work Order.

24. On the 'Payments' sub-tab;

- a. Click 'Add', a pop up will be seen as shown below;

The screenshot shows a 'Payments' form with the following fields and values:

Payment Term	Payment After delivery *	Expected Completion Period	30 *
Liquidated Damages	10 *	Expected Completion Date	01/01/2011 112 *
Expected Payment Date	01/02/2011 112	Payment Percentage	40
		Payment Amount	360000

- b. Enter data in the following fields;

- o Payment Term
- o Expected Completion Period
- o Expected Completion Date
- o Liquidated Damages
- o Payment Percentage

- c. Click 'Save'.

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

25. Work Order can be uploaded in the 'Documents' tab.

26. Click on 'Move to Next Stage'. This will take the procurement to '**WCC & Payments**' stage.

27. On the '**Work Completion**' sub-tab;

The screenshot shows the 'Work Completion' sub-tab interface. The navigation bar includes the following tabs: Pkg Details, Invitation Letter, Quotation Opening, Quotation Evaluation, Recomm. for Award, Letter of Acceptance, Gen. of WO, and **WCC & Payment**. Below the navigation bar, there are instructions: "Use Work Completion Tab to enter work completion details and to generate Work Completion Certificate." and "Use 'Payments' Tab to track payments." At the bottom, there is a table with columns: "Actual Date of Completion", "Work Done", and "Delete". The "Work Done" column is highlighted in red. The table is currently empty, displaying the message "There are no items to show in this view."

a. Click on 'Add', a pop up will be seen as shown below;

b. Enter data in the following fields;

- o Actual Date of Completion
- o Work Done
- o Balance Work

c. Click 'Save'

d. To Generate the WCC Report click on 'Generate WCC'

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

28. Environmental Checklist can be downloaded, checked and uploaded in the documents tab.

29. Payment details can be captured on the '**Payments**' sub-tab;

Package : MI Tanks(TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Work Completion Certificate & Payments

Pkg Details Invitation Letter Quotation Opening Quotation Evaluation Recomm. for Award Letter of Acceptance Gen. of WO WCC & Payment

Use Work Completion Tab to enter work completion details and to generate Work Completion Certificate.

Use 'Payments' Tab to track payments.

Contractor Details (0) **Payments (2)** Work Completion (1) Documents

Help

Payment Term	Expected Completion Date	Expected Completion Period	Payment Percentage	Delete
Payment After delivery	01/01/2011	30	40.00	<input type="checkbox"/>
Payment after final check	28/02/2011	60	60.00	<input type="checkbox"/>

- a. Click on the Payment Term and enter data in the following fields;
 - o Work Completed?
 - o Liquidated Damages Waived?
 - o WCC Generated?
 - o Actual Completion Period
 - o Comments (if Actual Completion Period is not as per planned)
 - o Actual Payment Date
 - o Comments (if Actual Payment Date is not as per planned)
 - o Actual Payment Amount
 - o Comments (if Actual Payment Amount is not as per planned)
 - b. Click 'Save'
 - c. To enter details of another payment repeat steps a and b.
30. 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 as shown below;

Complete Procurement Process | Stage Information | Cancel Procurement | **Completion Checklist** | Save | Environment Checklist | Back | Help

Package : MI Tanks(TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Work Completion Certificate & Payment (* Mandatory)

Pkg Details | Invitation Letter | Quotation Opening | Quotation Evaluation | Recomm. for Award | Letter of Acceptance | Gen. of WO | WCC & Payment

Completion Checklist - Windows Internet Explorer

Question	User Response
Are all the payments done?	<input type="text"/> *
Is all the works completed?	<input type="text"/> *
Is the environmental checklist updated and uploaded?	<input type="text"/> *

31. Fill in the completion checklist then click on 'Complete Procurement Process' this will complete the procurement for that Package.

Complete Procurement Process | Stage Information | Cancel Procurement | Completion Checklist | Save | Environment Checklist | Back | Help

Package : MI Tanks(TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Work Completion Certificate & Payments (* Mandatory)

Pkg Details | Invitation Letter | Quotation Opening | Quotation Evaluation | Recomm. for Award | Letter of Acceptance | Gen. of WO | WCC & Payment

Use Work Completion Tab to enter work completion details and to generate Work Completion Certificate.

Use 'Payments' Tab to track payments.

END – Shopping Works

Direct Contracting

All steps for Direct Contracting are same as Shopping except;

- Quotations are invited from only one supplier/ contractor. Thus the condition on minimum three suppliers/ contractors is not there for Direct Contracting.



NATIONAL COMPETITIVE BIDDING METHOD

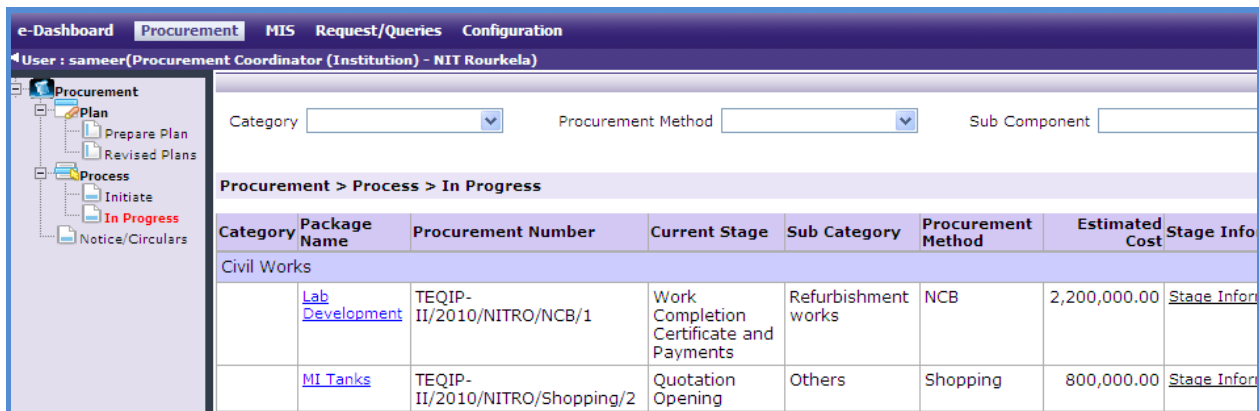
User Guide – Procurement Using NCB Method

National Competitive Bidding (NCB)

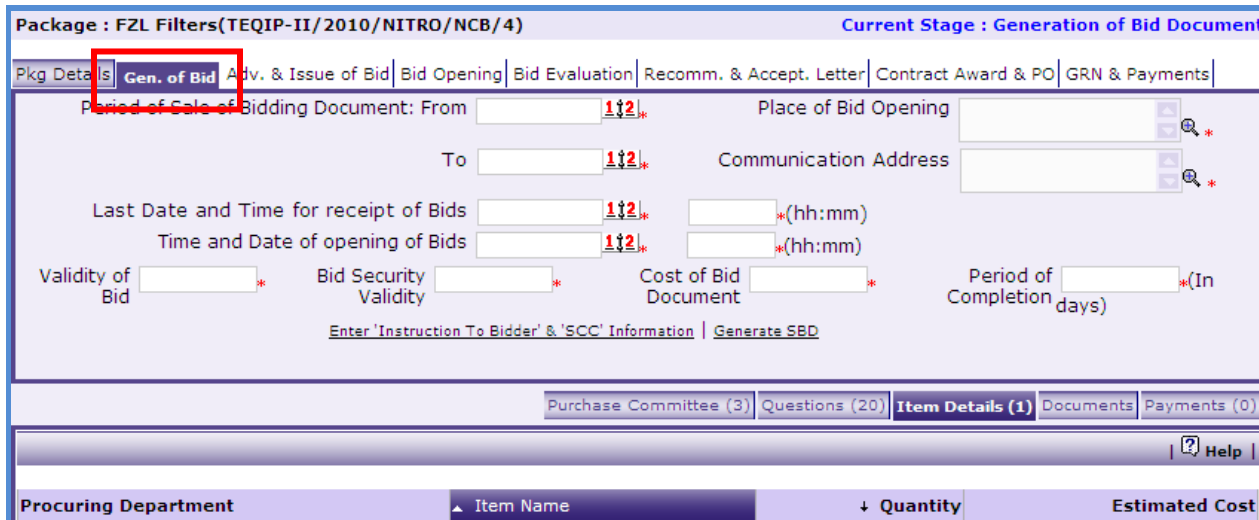
NCB Method can be used for procurement of 'Goods' as well as for procurement of 'Civil Works'. System will automatically allow selection of NCB Method when the value-threshold is > USD 20,000 and Less than USD 300,000 for Goods and > USD 30, 000 for Civil Works.

NCB Goods

To do procurement using NCB Good, **Go to Procurement-> Procurement Request and select the In Progress Procurements tab.**



1. Click on the package name that has NCB as the procurement method and Category as Goods.
2. First stage of NCB is 'Gen. of Bid'.



3. On the 'Gen. of Bid' tab enter data in the following fields;
 - o Date of Commencement of Sale of Bidding Document
 - o Last Date for Sale of Bidding Document
 - o Validity of Quotation

- Last Date of Submission
- Submission Time (hh:mm)
- Bid Security Validity
- Planned Bid Opening Date
- Planned Bid Opening Time (hh:mm)
- Cost of Bid Document
- Place of Bid Opening
- Completion Period
- Communication Address

4. Click 'Save'

5. Click on the 'Enter 'Instruction To Bidder' & 'SCC' Information' and enter the details.

6. On the 'Items' sub-tab;

Package : FZL Filters(TEQIP-II/2010/NITRO/NCB/4) Current Stage : Generation of Bid Document

Plkg Details | **Gen. of Bid** | Adv. & Issue of Bid | Bid Opening | Bid Evaluation | Recomm. & Accept. Letter | Contract Award & PO | GRN & Payments

Period of Sale of Bidding Document: From To Place of Bid Opening

Communication Address

Last Date and Time for receipt of Bids *(hh:mm)

Time and Date of opening of Bids *(hh:mm)

Validity of Bid * Bid Security Validity * Cost of Bid Document * Period of Completion *(In days)

[Enter 'Instruction To Bidder' & 'SCC' Information](#) | [Generate SBD](#)

Purchase Committee (3) Questions (20) **Item Details (1)** Documents Payments (0)

Procuring Department	Item Name	Quantity	Estimated Cost
Institution Level	Filter Conial Slad	12	1,080,000.00

e. Click 'Item Name', a pop up will be seen as shown below;

Save Close

(* Mandatory)

Item Information

Item Name * Description

Quantity 12 Estimated Cost 1080000

Procuring Department Institution Level

[Search Specification](#)

Specifications

f. Enter 'Specifications' – Click on search specification to get specifications from other items.

- g. Click 'Save'
 - h. If there are more than one item then, repeat steps from a. to c.
7. On the 'Payments' sub-tab;
- a. Click 'Add', a pop up will be seen as shown below;

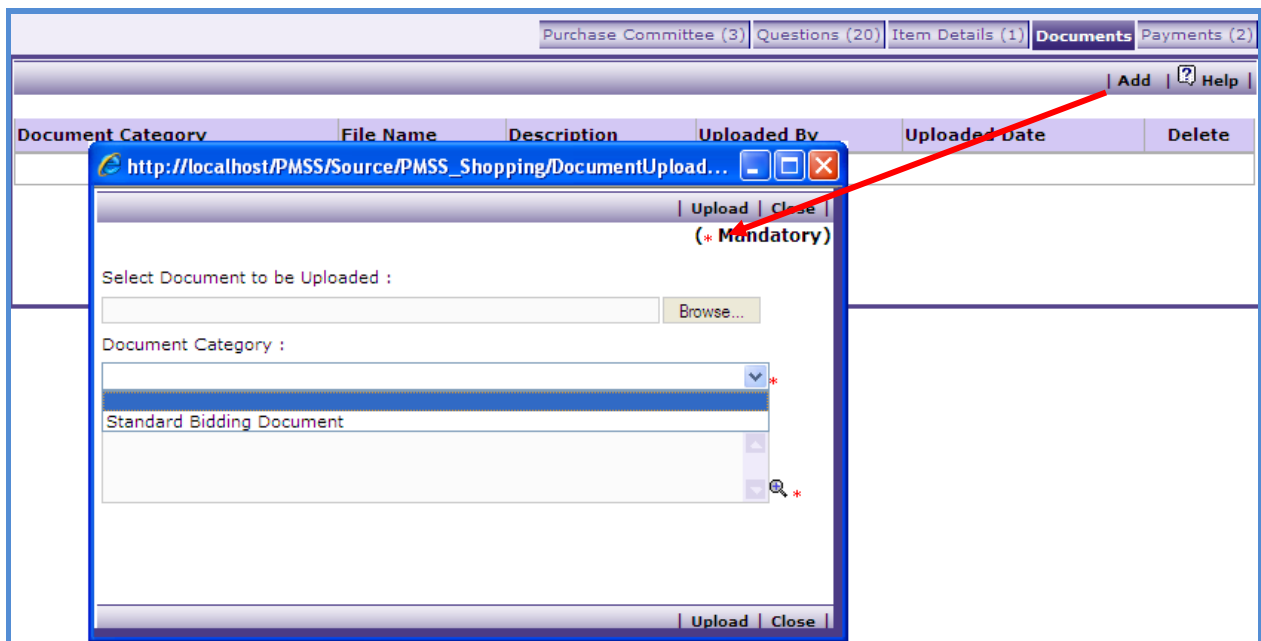
- b. Enter data in the following fields;
 - o Payment Term
 - o Expected Completion Period
 - o Expected Completion Date
 - o Liquidated Damages
 - o Payment Percentage
 - c. Click 'Save'.
 - d. To add another payment term repeat steps from a. to c.
8. On the 'Define Question' sub-tab;
- a. Click 'Add', a pop up will be seen as shown below;

- b. Enter data in the following fields;
 - o Question Category – Whether it is Evaluation Question or Post Qualification Question.
 - o Question

- Is Decision Making Question? – If the bidder is going to be marked as responsive/ non- responsive based on this question then 'Check' this box
- Non Responsive Value – Select the value (Yes/ No) based on which the bidder will become non- responsive. E.g. if the question is 'Does the Contractor have a local service center?' then the non- responsive value will be 'No'.

Note: Question should be formed in such a way that the answer is in Yes/ No form. The newly added questions will appear during the Bid Evaluation stage.

- c. Click 'Save'.
 - d. To add another Question repeat steps from a. to c.
9. Click on the Generate SBD. This will generate the SBD. Edit the SBD to fill-in the other required sections.
 10. On the 'Documents' sub-tab, click 'Add';



- a. Select 'Standard Bidding Document' Category
 - b. Browse and upload the document
11. Once the required details are captured click on 'Move to Next Stage'. This will move the procurement to '**Advertisement & Issue of Bids**' stage.
 12. On the 'Adv. & Issue of Bids' tab click on 'Generate Advertisement'. This will show a popup as shown below

- a. Enter data in the following fields;
 - o Select Package – All the packages which are in Adv. Stage will be displayed. Press control button on the keyboard to select more than one package.
 - o Local Paper Name(s)
 - o Date of Advertisement(Local)
 - o National Paper Name (s)
 - o Date of Advertisement(National)
- b. Click 'Save'
- c. 'Print Advertisement' link will seen, click on this link to generated the advertisement.

- d. This Advertisement can be unloaded in the 'Documents' sub-tab.
 - e. Enter the 'Actual Publication Date (Local)' and Actual Publication Date (National) when advertisement is actually published in the papers.
13. As and when Bids are issued, bidder details can be captured in the 'Bidder Details' sub-tab;

Package : FZL Filters(TEQIP-II/2010/NITRO/NCB/4) Current Stage : Advertisement and Issue of Bid

Pkg Details | Gen. of Bid | **Adv. & Issue of Bid** | Bid Opening | Bid Evaluation | Recomm. & Accept. Letter | Contract Award & PO | GRN & Payments

Click on 'Generate Advertisement' link to enter the advertisement details and print the advertisement.

[Generate Advertisement](#)

Local Paper Name (s) * Published date of Advertisement(Local) *

National Paper Name (s) * Published date of Advertisement(National) *

Actual Publication Date (Local) * Actual Publication Date (National) *

As and when bids are issues enter bidder details using 'Bidder Details' tab.
Enter Prebid Meeting Details using the 'Enter Prebid Meeting Information' link.

[Enter Prebid Meeting Information](#)

Bidder Details (0) Documents

Bidder Name	Address	Phone Number	Bid Document	Delete
There are no items to show in this view.				

- a. Click 'Add', a pop up will be seen as shown below;

Save | Save and Add | Close | Help |

(* Mandatory)

Bidder Details NIT Rourkela | Package : FZL Filters (TEQIP-II/2010/NITRO/NCB/4)

Bidder Name * [Select Bidder](#) Address

City * State *

Pin Code * Phone Number *

Name Of Representative * Email ID *

FAX Number PAN Number

TAN Number Tax Number

- b. Enter data in the following fields;
- Bidder Name – Click on Select Bidder to get the bidder from existing list of bidders.
 - Address
 - City
 - State
 - Email ID
 - Pin Code
 - Name Of Representative
 - Phone Number
 - Fax Number
 - PAN Number

- o TAN Number
- o Tax Number
- c. Click 'Save'
- d. To add another Bidder repeat steps from a. to c.

14. Prebid Meeting Information can be entered using the 'Enter Prebid Meeting Information' link. Click on this link will show a popup as shown below;

The screenshot shows a web form titled "Prebid Meeting Details" with a "(*) Mandatory" label and "NIT Rourkela" text. The form contains the following fields and values:

- Package Code: TEQIP-II/2010/NITRO/NCB/4
- Package Name: FZL Filters
- Prebid Date: 21-Oct-2010
- Prebid Time: 2:00
- Actual Date of Prebid meeting: 21/10/2010 (with a red "112" icon)
- Clarification Issued Date: 22/10/2010 (with a red "112" icon)
- Was there any Corrigendum and Addendum?: Yes (dropdown menu)
- Is Clarification issued to all Bidders: Yes (dropdown menu)
- Prebid MOM: MoM (text input field)

The form also includes a "Save and Close" button, a "Save" button, a "Close" button, and a "Help" button. A search icon is located at the bottom right of the form.

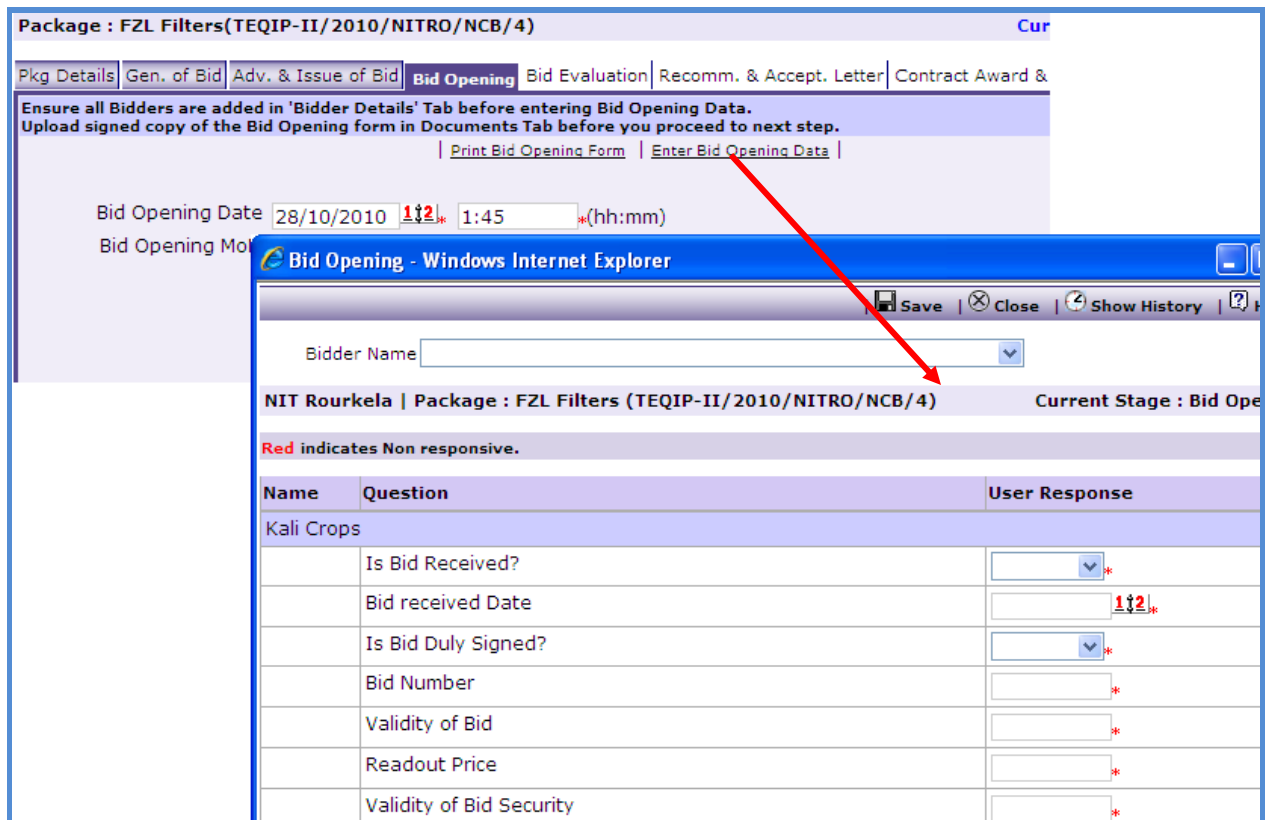
- a. Enter data in the following fields;
 - o Actual Date of Prebid meeting
 - o Clarification Issued Date
 - o Was there any Corrigendum and Addendum?
 - o Is Clarification issued to all Bidders
 - o Prebid MOM
- b. Larger MOMs can also be uploaded in the 'Documents' sub-tab

15. Click on 'Move to Next Stage'. This will move the procurement to '**Bid Opening**'

16. Click on 'Print Bid Opening Form'. During the bid opening processes this form can be used to capture data.

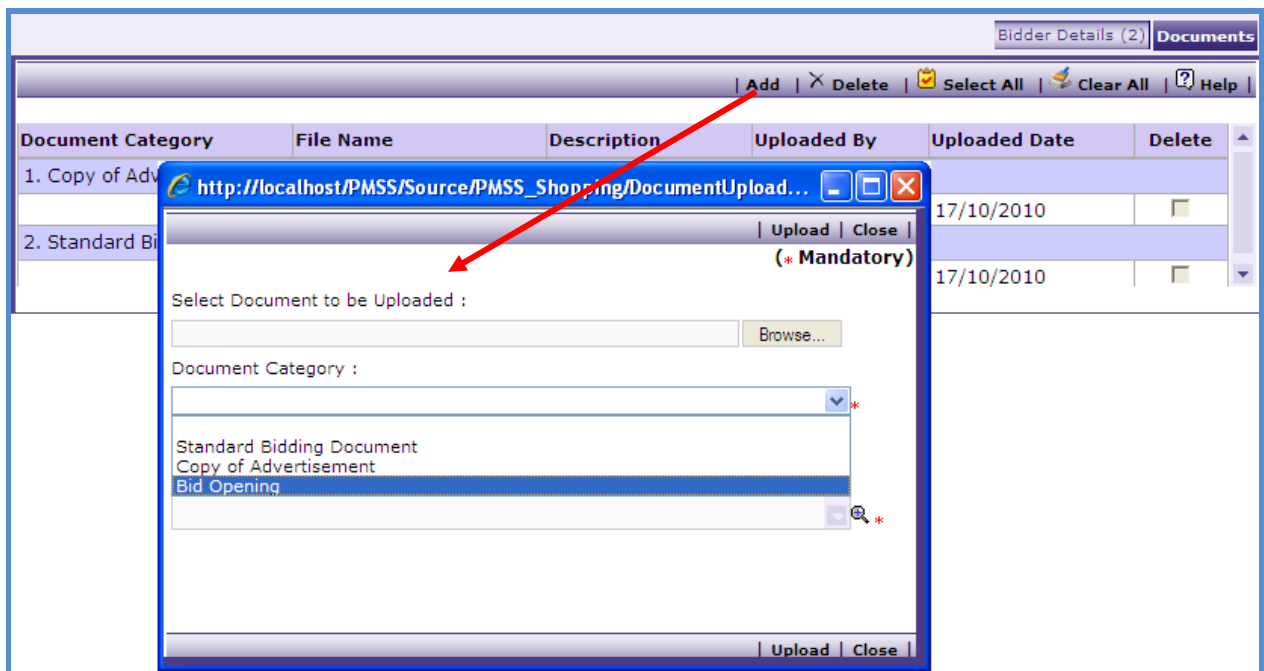
17. Bid Opening data needs to be put in the system. Enter the following fields;

- a. Bid Opening Date
- b. Bid Opening Time
- c. Bid MoM
- d. Click 'Save'
- e. Click on the 'Enter Bid Opening Data' link. This will show a pop up to enter the Responsiveness Criteria.



f. Enter the details and Click 'Save'.

18. On the 'Documents' sub-tab, Click 'Add';



a. Select 'Bid Opening' Category

b. Browse and upload the document

19. Click on 'Move to Next Stage'. This will move the procurement to '**Bid Evaluation**' stage.
20. On the 'Bid Evaluation' tab click on 'Print Bid Evaluation Form'. This form can be used during Bid Evaluation.
21. After Bid Evaluation is done, the data is required to be feed in the system.
 - a. Click on the 'Enter Bid Evaluation Data' link. This will show a pop up to enter the Comparative Statement.

Package : FZL Filters(TEQIP-II/2010/NITRO/NCB/4) Current Stage : Bid Evaluation

[Pkg Details](#) |
 [Gen. of Bid](#) |
 [Adv. & Issue of Bid](#) |
 [Bid Opening](#) |
 [Bid Evaluation](#) |
 [Recomm. & Accept. Letter](#) |
 [Contract Award & PO](#) |
 [GRN & Payment](#)

L1 Bidder will be automatically selected and displayed by the system once the 'Bid Evaluation' data is filled.
 Post Qualification link will appear against the L1 Bidder. Click on this link to perform the Post Qualification.

[Print Bid Evaluation Form](#) |
 [Enter Bid Evaluation Data](#)

Lowest Responsive after evaluation

Bidder Name

NIT Rourkela | Package : FZL Filters (TEQIP-II/2010/NITRO/NCB/4) Current Stage : Bid Evaluation

Red indicates Non responsive.

Name	Question	User Response
Kali Crops	Quotation Details	
	Is unconditional discount offered?	<input type="text"/> *
	Is Cross Discount applicable?	<input type="text"/> *
	Any Arithmetic error	<input type="text"/> *
	Is Price Loading applicable?	<input type="text"/> *
	Price Adjustment due to loading	<input type="text"/> *
	Is Technically Responsive?	<input type="text"/> *

- b. Enter the details and Click 'Save'.
22. Once Comparative Statement data is save the system will show the lowest evaluated responsive supplier (L1).
23. 'Post Qualification' link will be seen against L1;

Package : FZL Filters(TEQIP-II/2010/NITRO/NCB/4) Current Stage : Bid Evaluation

[Pkg Details](#) | [Gen. of Bid](#) | [Adv. & Issue of Bid](#) | [Bid Opening](#) | **[Bid Evaluation](#)** | [Recomm. & Accept. Letter](#) | [Contract Award & PO](#) | [GRN & Payments](#)

L1 Bidder will be automatically selected and displayed by the system once the 'Bid Evaluation' data is filled.
 Post Qualification link will appear against the L1 Bidder. Click on this link to perform the Post Qualification.

[Print Bid Evaluation Form](#) | [Enter Bid Evaluation Data](#)

Lowest Responsive after evaluation Kali Crops [Post Qualification Criteria](#)

a. Click on the link to get a popup as shown below;

[Save](#) | [Close](#) | [Show History](#) | [Help](#)

NIT Rourkela | Package : FZL Filters (TEQIP-II/2010/NITRO/NCB/4) Current Stage : Bid Evaluation

Red indicates Non responsive.

Name	Question	User Response
Kali Crops	Quotation Details	
	Is Minimum Financial Turnover met in at least once of the last three years excluding current financial year?	<input type="text"/> *
	Satisfactory delivery of similar goods/items of value not less than 80% of estimated contract value in less than 3 years.	<input type="text"/> *
	Sales Tax number	<input type="text"/> *

b. Fill in the response for the selected Bidder

c. If the Bidder becomes non-responsive in this step then automatically next lowest evaluated Bidder will be seen;

d. Repeat the Post Qualification process for this Bidder.

24. On the 'Documents' sub-tab;

c. Click 'Add', select the 'Bid Evaluation' Category

d. Browse and upload the document

25. Click on 'Move to Next Stage'. This will take the procurement to 'Recomm. & Accept. Letter' stage.

Package : FZL Filters(TEQIP-II/2010/NITRO/NCB/4) Current Stage : Recommendation for Award and Acceptance Letter

[Pkg Details](#) | [Gen. of Bid](#) | [Adv. & Issue of Bid](#) | [Bid Opening](#) | [Bid Evaluation](#) | **[Recomm. & Accept. Letter](#)** | [Contract Award & PO](#) | [GRN & Payments](#)

L1 Supplier *

Recommendation Comments

Performance Security Amount * Performance Security Period (In Days)

Click on 'Generate Acceptance Letter' link to generate the acceptance letter.

[Generate Acceptance Letter](#)

26. If the lowest evaluated responsive supplier (L1) is not acceptable by the committee then another supplier can be selected in this stage. If another supplier is selected then enter the comments in the 'Comments' field and click 'Save'. On the 'Documents' sub-tab the evaluation report can be uploaded under the Evaluation Report category.
27. Click on 'Generate Acceptance Letter' to generate the Acceptance Letter. Signed Copy of the letter can be uploaded in the documents sub-tab, for records.
28. Click on 'Move to Next Stage'. This will take the procurement to '**Contract Award and PO**' stage.
29. Click on 'Generate Contract & PO'. In the Pop up enter the following fields;
 - a. Contract Start Date
 - b. Contract Document signed – date
 - c. Performance Security Within 21 Days?
 - d. Performance Security Amount
 - e. Arbitrator Agreed?
 - f. Performance Security Instrument
 - g. VAT %
 - h. Performance Security Expiry Date
 - i. Octroi and Others
 - j. Basic Cost Per Unit – only if changed.

Package : FZL Filters(TEQIP-II/2010/NITRO/NCB/4) Current Stage : Contract Award and PO Generation

[Pkg Details](#) | [Gen. of Bid](#) | [Adv. & Issue of Bid](#) | [Bid Opening](#) | [Bid Evaluation](#) | [Recomm. & Accept. Letter](#) | **Contract Award & PO** | [GRN & Payments](#)

Click on 'Generate Contract & PO' link to enter the Contract and PO details and print the Contract and PO.

PO# Generated On

Contract Generation - Windows Internet Explorer

Print Contract | Print PO | Save | Close | Help

Contract Generation NIT Rourkela | Package : FZL Filters (TEQIP-II/2010/NITRO/NCB/4) (* Mandatory)

Supplier Name PO #

Contract Start Date Contract Document signed - date

Performance Security Within 21 Days Performance Security Amount

Arbitrator Agreed? Performance Security Instrument

VAT Percent Performance Security Expiry Date

Octroi And Others

Evaluated Price Total Price

Contract Details NIT Rourkela | Package : FZL Filters (TEQIP-II/2010/NITRO/NCB/4)

Item Name	Description	Qty	Basic Cost Per Unit	Total Basic Cost
Filter Conial Slad *	Conical 21* 34	12	90000*	1080000

30. Click 'Save'
31. Click 'Print PO'. This will print the PO.
32. PO can be uploaded in the 'Documents' tab.
33. Click 'Print Contract'. This will print the Contract.
34. Contract can be uploaded in the 'Documents' tab.
35. Click on 'Move to Next Stage'. This will take the procurement to '**GRN & Payments**' stage. Whenever Goods are received the details can be captured in this stage.
36. On the '**GRN**' sub-tab;

- a. Click on 'Add', a pop up will be seen as shown below;

- b. Enter data in the following fields;
 - o Date of Supply
 - o In the Items section click 'Add' and enter the following fields;

Received Note NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3)

Before generating Asset Register please make sure all the received items are entered. Asset Register once generated can not be generated again and No changes to this GRN will be allowed.

Supplier Name: SNS Corp Ltd Date Of Supply: [Date]

GRN Details (1)

Buttons: Add, Delete, Select All, Clear All, Help

Item Code	Item Name	Comments	Received Quantity	Stock Register Name	Page No.	Serial No.	Item Distribution	Delete

Total Records : 1

- Item Code – This code will be used when generating asset numbers
- Item Name
- Comments
- Received Quantity
- Stock Resistor Name
- Page No.
- Serial No.

c. To add another Item click add and enter the data as above.

d. Click 'Save'

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

Received Note NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3)

Before generating Asset Register please make sure all the received items are entered. Asset Register once generated can not be generated again and No changes to this GRN will be allowed.

Supplier Name: SNS Corp Ltd Date Of Supply: 27/10/2010

GRN Document: [Browse...]
Asset Document: [Browse...]

GRN Details (1)

Buttons: Add, Delete, Select All, Clear All, Help

Item Code	Item Name	Comments	Received Quantity	Stock Register Name	Page No.	Serial No.	Item Distribution	Delete
	ASDSA Suction Appi		20	23M23	23	354664	Item Distribution	

Total Records : 1

f. Click on the link to get a pop up. In this pop up, enter the Quantity supplied to each department.

g. To Generate the GRN Report click on 'Print GRN'

Print GRN | Print Asset Register | Save | Close | Help

(* Mandatory)

Received Note NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3)

Before generating Asset Register please make sure all the received items are entered.
Asset Register once generated can not be generated again and No changes to this GRN will be allowed.

Supplier Name SNS Corp Ltd * Date Of Supply 27/10/2010 112 *

GRN Document Browse... *
Asset Document Browse...

GRN Details (1)

Add | Delete | Select All | Clear All | Help

Item Code	Item Name	Comments	Received Quantity	Stock Register Name	Page No.	Serial No.	Item Distribution	Delete
*	ASDSA Suction Appi	*	20	23M23	23	354664	Item Distribution	*

- h. The GRN Report can be uploaded using the Browse function. Once uploaded, Link will appear as shown below.

Print GRN | Print Asset Register | Save | Close | Help

(* Mandatory)

Received Note NIT Rourkela | Package : Suction Apparatus (TEQIP-II/2010/NITRO/Shopping/3)

Before generating Asset Register please make sure all the received items are entered.
Asset Register once generated can not be generated again and No changes to this GRN will be allowed.

Supplier Name SNS Corp Ltd * Date Of Supply 27/10/2010 112 *

GRN Document Browse... Paks.txt *
Asset Document Browse...

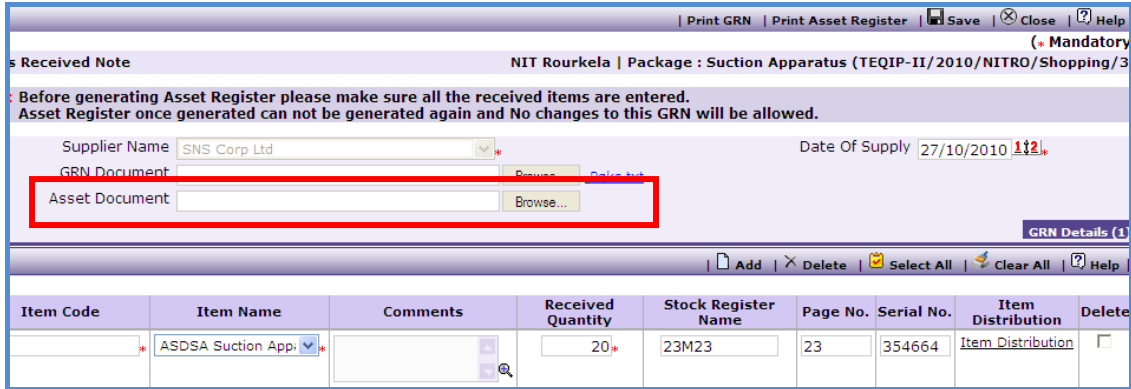
GRN Details (1)

Add | Delete | Select All | Clear All | Help

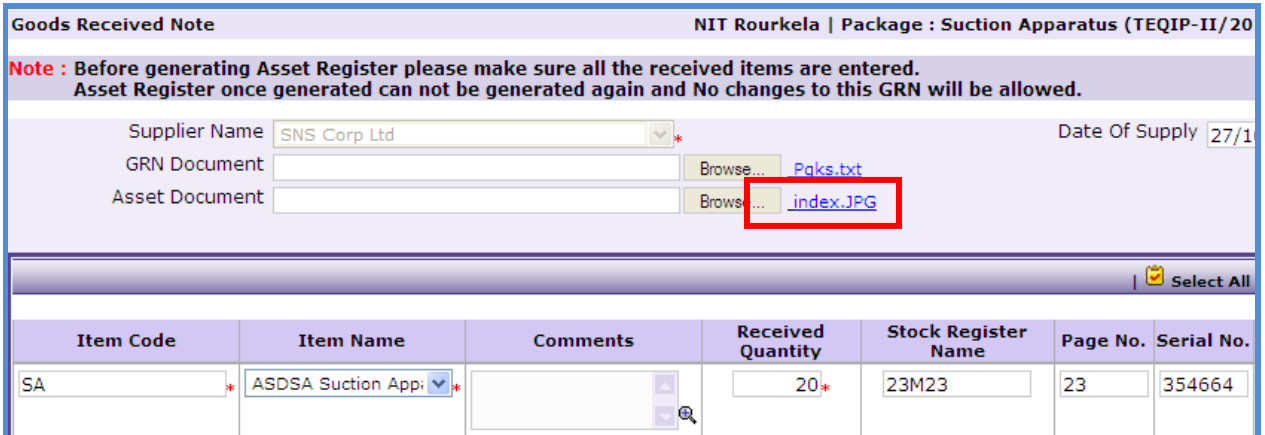
Item Code	Item Name	Comments	Received Quantity	Stock Register Name	Page No.	Serial No.	Item Distribution	Delete
*	ASDSA Suction Appi	*	20	23M23	23	354664	Item Distribution	*

- i. Report can be downloaded by clicking on the link.
- j. To Generate Asset Register click on 'Print Asset Register'.

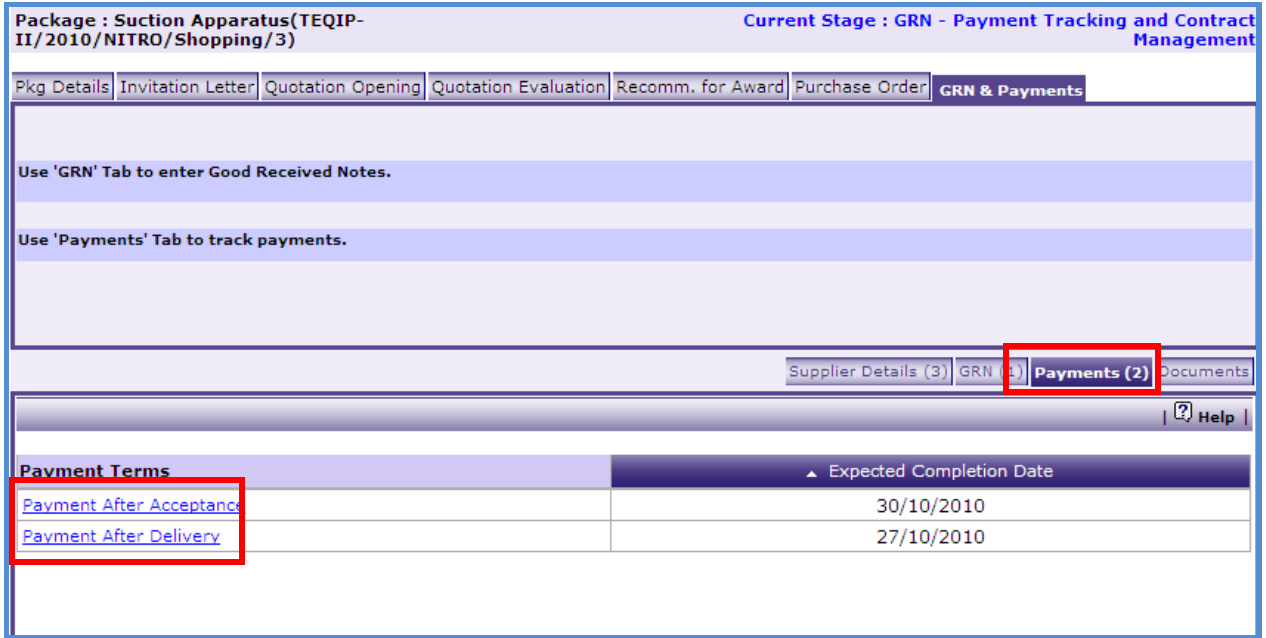
Note: Asset Register can be generated only once. System will give a warning message to confirm that all the items have been added etc. Once Asset Register is generated no changes can be made to that GRN record.



- k. Asset Register excel will have three columns;
 - o Unique Number – Will be Auto generated
 - o Model Number – To be entered by the user
 - o Serial Number - To be entered by the user
- l. Once the Asset Register is filled up it can be uploaded using the Browse function
- m. Once uploaded, Link will appear as shown below.



- n. Asset Register can be downloaded by clicking on the link.
 - o. To add another record for GRN repeat steps from a. to o.
37. Payment details can be captured on the '**Payments**' sub-tab;



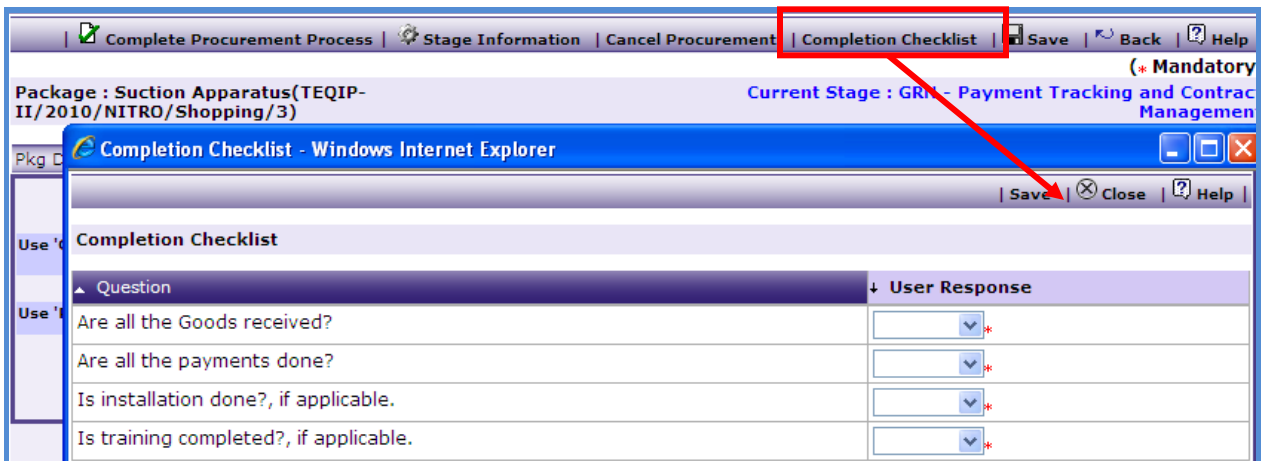
a. Click on the Payment Term and enter data in the following fields;

- o Actual Completion Date
- o Payment Date
- o Cheque/Draft Number
- o Amount
- o Liquidated Damages Amount
- o Comments

b. Click 'Save'

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

38. 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 as shown below;



39. Fill in the completion checklist then click on 'Complete Procurement Process' this will complete the procurement for that Package.

The screenshot displays the PMSS v1.0 interface. At the top, a navigation bar contains several buttons: 'Complete Procurement Process' (highlighted with a red box), 'Stage Information', 'Cancel Procurement', 'Completion Checklist', 'Save', 'Back', and 'Help'. Below the navigation bar, the package details are shown: 'Package : Suction Apparatus(TEQIP-II/2010/NITRO/Shopping/3)' and 'Current Stage : GRN - Payment Tracking and Contract Management'. A series of tabs are visible: 'Pkg Details', 'Invitation Letter', 'Quotation Opening', 'Quotation Evaluation', 'Recomm. for Award', 'Purchase Order', and 'GRN & Payments'. The 'GRN & Payments' tab is currently selected. Below the tabs, there are two instructional messages: 'Use 'GRN' Tab to enter Good Received Notes.' and 'Use 'Payments' Tab to track payments.'

END – NCB Shopping

NCB Works

To do procurement using NCB Works, **Go to Procurement-> Process-> In Progress Procurements.**

Category	Package Name	Current Stage	Procurement Number	Sub Category	Procurement Method	Estimated Cost	Workflow Info
Civil Works	1st Floor POP	Bid Evaluation	TEQIP-II/2010/CFI-Gwalior/NCB/5	Extension of Buildings	NCB	7,000,000.00	Workflow Infor
Goods	Swap 00023	Generation of Bid Document	TEQIP-II/ 2010/CFI-Gwalior/NCB/3	Equipment	NCB	5,290,000.00	Workflow Infor
	swap package 1	Letter of Invitation	TEQIP-II/ 2010/CFI-Gwalior/Shopping/2	Equipment	Shopping	2,500.00	Workflow Infor
	Swap002	Letter of Invitation	TEQIP-II/2010/CFI-Gwalior/Shopping/4	Furniture	Shopping	23,222.00	Workflow Infor
	Swap004	Advertisement and Issue of Bid	TEQIP-II/ 2010/CFI-Gwalior/NCB/1	Equipment	NCB	3,722,773.00	Workflow Infor

1. Click on the package name that has NCB as the procurement method and Category as Works.
2. First stage of NCB is '**Generation of Bid**'.

Package : **1st Floor POP(TEQIP-II/2010/CFI-Gwalior/NCB/5)** Current Stage : **Generation of Bid Document**

Pkg Details: **Gen. of Bid** | Adv. & Issue of Bid | Bid Opening | Bid Evaluation | Recomm. & Accept. Letter | Contract Award & WO | WCC & Payment

Date of Commencement of Sale of Bidding Document: 12/09/2010 11:12 AM Last Date for Sale of Bidding Document: 29/09/2010 11:12 AM Validity of Bid: 90 days

Last Date and Time of Submission: 12/10/2010 12:30 AM (hh:mm) Planned Bid Opening Date and Time: 12/10/2010 12:45 AM (hh:mm)

Bid Security Validity: 45 days Cost of Bid Document: 50000 Period of Completion: 90 days (In days)

Place of Bid Opening: Sammar Communication Address: ADXS, SSS

Buttons: Enter 'Instruction To Bidder' & 'SCC' Information | Generate SBD

Purchase Committee (3) | Evaluation Questions (35) | Item Details (1) | Contractor Details (3) | Documents | Payments (1)

Buttons: Add | Delete | Select All | Clear All | Help

Purchase Committee Member Name	Designation	Role In Purchase Committee	Delete
swwq	sad		<input type="checkbox"/>
rwwq	ew		<input type="checkbox"/>
hqq	hggggg		<input type="checkbox"/>

3. On the 'Gen. of Bid' tab enter data in the following fields;
 - o Date of Commencement of Sale of Bidding Document
 - o Last Date for Sale of Bidding Document
 - o Validity of Bid
 - o Last Date and Time of Submission
 - o Planned Bid Opening Date and Time
 - o Bid Security Validity

- o Cost of Bid Document
 - o Period of Completion
 - o Place of Bid Opening
 - o Communication Address
4. Click 'Save'
 5. Click on the "Enter 'Instruction To Bidder' & 'SCC' Information" link, a pop up will be seen as shown below;

'Instruction To Bidder' & 'SCC' Information (* Mandatory) **IIITM Gwalior**

Package Code TEQIP-II/2010/CFI-Gwalior/NCB/5 **Package Name** 1st Floor POP

Invitation of Bids details

Cheque in favour of * Payable At *

Bidding Document Sell Start Time *(hh:mm) 24 hr format Bidding Document Sell End Time (hh:mm) 24 hr format

Postal charges, Inland * Postal charges, Overseas *

Bid Security * Officer Inviting Bids

Prebid Date Bidding Time (hh:mm) 24 hr format

Special conditions for contract

Warranty *(In days or NA)

Arbitration proceedings shall be held at * Address of the Purchaser for Notice *

6. Fill in the required information and click 'Save'.
7. On the 'Items' sub-tab;

Period of Sale of Bidding Document: From * To *

Place of Bid Opening * Communication Address *

Last Date and Time for receipt of Bids *(hh:mm)

Time and Date of opening of Bids *(hh:mm)

Validity of Bid * Bid Security Validity * Cost of Bid Document * Period of Completion *(In days)

[Enter 'Instruction To Bidder' & 'SCC' Information](#) | [Generate SBD](#)

Purchase Committee (3) Questions (2) **Item Details (1)** Documents Payments (0)

Procuring Department Item Name Estimated Cost

- a. Click 'Item Name', a pop up will be seen as shown below;

The screenshot shows the 'Item Information' form with the following data:

Item Name	Wall fixing works *	Description	1st floor wall fixing
Quantity	1	Estimated Cost	1600500
Procuring Department	Institution Level		
Specifications	[Empty field with search icon]		

- b. Enter 'Specifications' – Click on search specification to get specifications from other items.
 - c. Click 'Save'
 - d. If there are more than one item then, repeat steps from a. to c.
8. On the 'Payments' sub-tab;
- a. Click 'Add', a pop up will be seen as shown below;

The screenshot shows the 'Payments' form with the following data:

Payment Terms	[Empty field] *	Expected Completion Period	[Empty field] * (In days)
Liquidated Damages	[Empty field] *	Expected Completion Date	[Empty field] 1/12 *
Percentage	[Empty field]		
Expected Payment Date	[Empty field] 1/12		

- b. Enter data in the following fields;
 - o Payment Term
 - o Expected Completion Period
 - o Expected Completion Date
 - o Liquidated Damages
 - o Payment Percentage
 - o Expected Payment Date
 - c. Click 'Save'.
 - d. To add another payment term repeat steps from a. to c.
9. On the 'Define Question' sub-tab;
- a. Click 'Add', a pop up will be seen as shown below;

b. Enter data in the following fields;

- Question Category – Select whether the question will be used during Evaluation or during Post Qualification.
- Question – Enter the Question
- Is Decision Making Question? – If the bidder is going to be marked as responsive/ non- responsive based on this question then 'Check' this box
- Non Responsive Value – Select the value (Yes/ No) based on which the bidder will become non- responsive. E.g. if the question is 'Does the Contractor have a local service center?' then the non- responsive value will be 'No'.

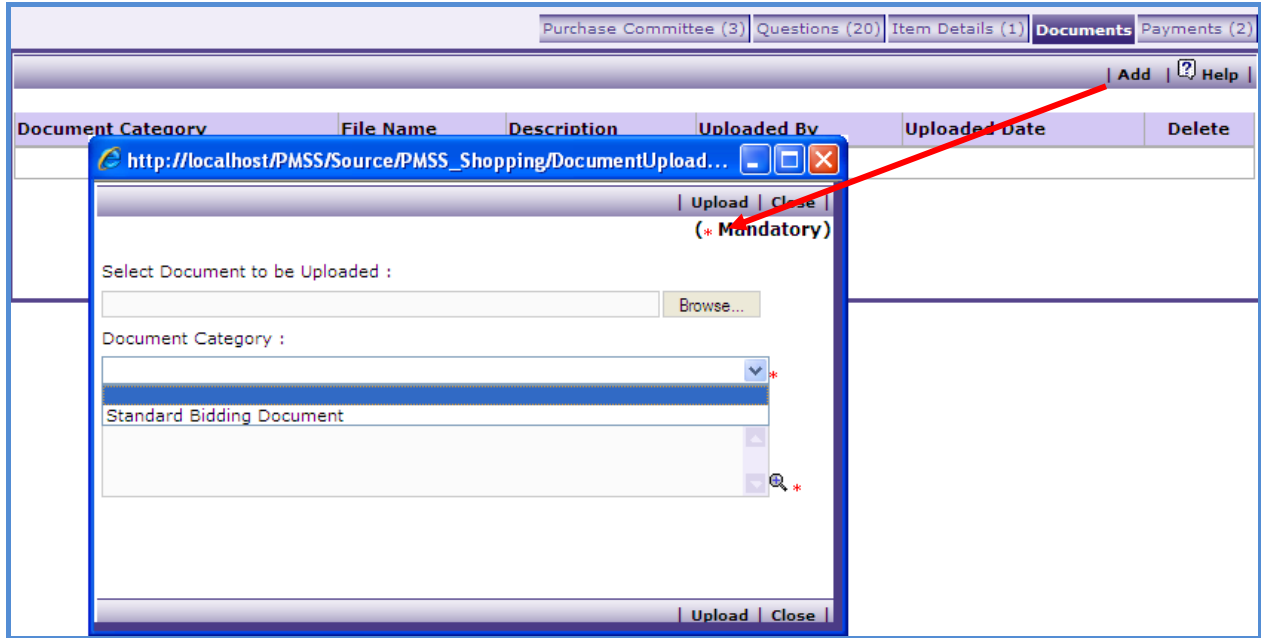
Note: Question should be formed in such a way that the answer is in Yes/ No/ NA form. The newly added questions will appear during the Bid Evaluation/ Post Qualification stage.

c. Click 'Save'.

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

40. Click on the Generate SBD. This will generate the SBD. Edit the SBD to fill-in the other required sections.

41. On the 'Documents' sub-tab, click 'Add';



- c. Select 'Standard Bidding Document' Category
- d. Browse and upload the document

10. Once the required details are captured click on 'Move to Next Stage'. This will move the procurement to '**Advertisement & Issue of Bids**' stage.

11. On the 'Adv. & Issue of Bids' tab click on 'Generate Advertisement'. This will show a popup as shown below

- a. Enter data in the following fields;
 - o Select Package – All the packages which are in Adv. Stage will be displayed. Press control button on the keyboard to select more than one package.
 - o Local Paper Name(s)
 - o Date of Advertisement(Local)
 - o National Paper Name (s)
 - o Date of Advertisement(National)

- b. Click 'Save'
- c. 'Print Advertisement' link will seen, click on this link to generated the advertisement.

- d. This Advertisement can be unloaded in the 'Documents' sub-tab.
- e. Enter the 'Actual Publication Date (Local)' and Actual Publication Date (National) when advertisement is actually published in the papers.

12. As and when Bids are issued, bidder details can be captured in the 'Bidder Details' sub-tab;

- a. Click 'Add', a pop up will be seen as shown below;

b. Enter data in the following fields;

- Contractor Name
- Address
- City
- State
- Email ID
- Pin Code
- Name Of Representative
- Phone Number
- Fax Number
- PAN Number
- TAN Number
- Tax Number

c. Click 'Save'

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

13. Prebid Meeting Information can be entered using the 'Enter Prebid Meeting Information' link. Click on this link will show a popup as shown below;

c. Enter data in the following fields;

- Actual Date of Prebid meeting
- Clarification Issued Date
- Was there any Corrigendum and Addendum?
- Is Clarification issued to all Bidders

- o Prebid MOM
 - d. Larger MOMs can also be uploaded in the 'Documents' sub-tab
- 14. Click on 'Move to Next Stage'. This will move the procurement to '**Bid Opening**'
- 15. Click on 'Print Bid Opening Form'. During the bid opening processes this form can be used to capture data.
- 16. Bid Opening data needs to be put in the system. Enter the following fields;
 - a. Bid Opening Date
 - b. Bid Opening Time
 - c. Bid MoM
 - d. Click 'Save'
 - e. Click on the 'Enter Bid Opening Data' link. This will show a pop up to enter the Responsiveness Criteria.

Package : FZL Filters(TEQIP-II/2010/NITRO/NCB/4) Cur

[Pkg Details](#) | [Gen. of Bid](#) | [Adv. & Issue of Bid](#) | **[Bid Opening](#)** | [Bid Evaluation](#) | [Recomm. & Accept. Letter](#) | [Contract Award &](#)

Ensure all Bidders are added in 'Bidder Details' Tab before entering Bid Opening Data.
 Upload signed copy of the Bid Opening form in Documents Tab before you proceed to next step.

[Print Bid Opening Form](#) | [Enter Bid Opening Data](#)

Bid Opening Date *(hh:mm)

Bid Opening MoM

Bid Opening - Windows Internet Explorer

Save | Close | Show History

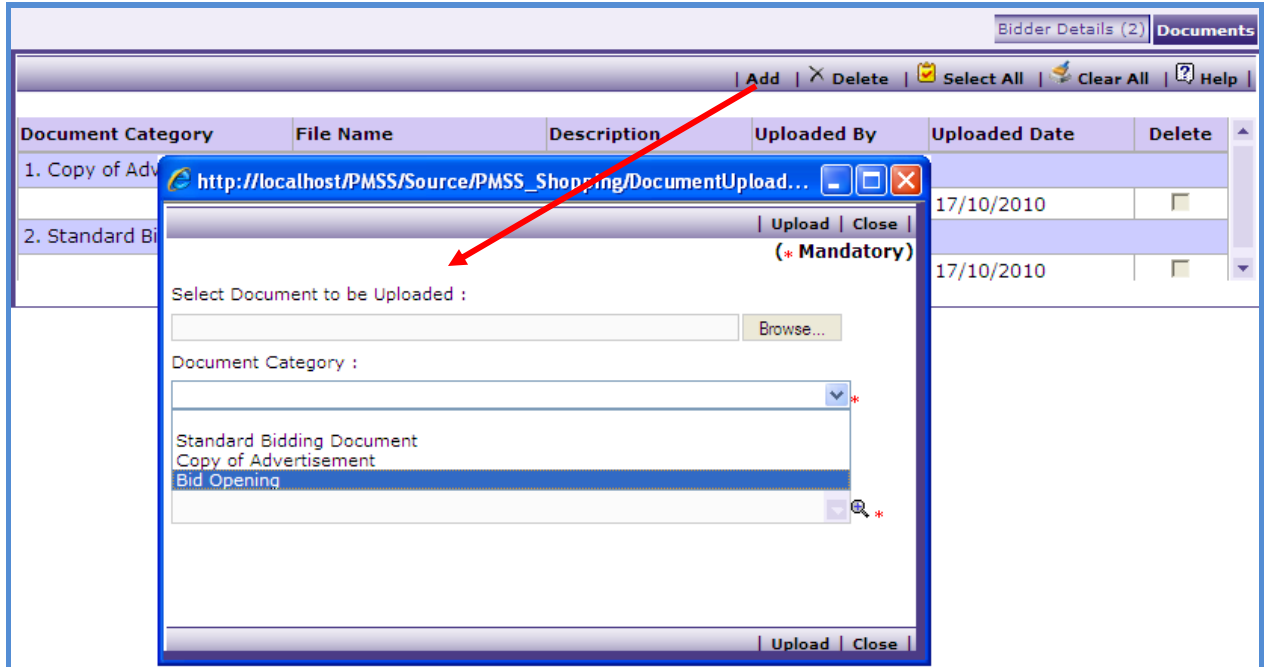
Bidder Name

NIT Rourkela | Package : FZL Filters (TEQIP-II/2010/NITRO/NCB/4) Current Stage : Bid Ope

Red indicates Non responsive.

Name	Question	User Response
Kali Crops		
	Is Bid Received?	<input type="text"/> *
	Bid received Date	<input type="text" value="1:45"/> *
	Is Bid Duly Signed?	<input type="text"/> *
	Bid Number	<input type="text"/> *
	Validity of Bid	<input type="text"/> *
	Readout Price	<input type="text"/> *
	Validity of Bid Security	<input type="text"/> *

- f. Enter the details and Click 'Save'.
- 17. On the 'Documents' sub-tab, Click 'Add';



- a. Select 'Bid Opening' Category
- b. Browse and upload the document

18. Click on 'Move to Next Stage'. This will move the procurement to '**Bid Evaluation**' stage.

19. On the 'Bid Evaluation' tab click on 'Print Bid Evaluation Form'. This form can be used during Bid Evaluation.

20. After Bid Evaluation is done, the data is required to be feed in the system.

- a. Click on the 'Enter Bid Evaluation Data' link. This will show a pop up to enter the Comparative Statement.

Package : FZL Filters(TEQIP-II/2010/NITRO/NCB/4) Current Stage : Bid Evaluation

Pkg Details | Gen. of Bid | Adv. & Issue of Bid | Bid Opening | **Bid Evaluation** | Recomm. & Accept. Letter | Contract Award

L1 Bidder will be automatically selected and displayed by the system once the 'Bid Evaluation' data is filled. Post Qualification link will appear against the L1 Bidder. Click on this link to perform the Post Qualification.

| [Print Bid Evaluation Form](#) | [Enter Bid Evaluation Data](#) |

Lowest Responsive after evaluation

Bid Evaluation - Windows Internet Explorer

Save | Close | Show History

Bidder Name

NIT Rourkela | Package : FZL Filters (TEQIP-II/2010/NITRO/NCB/4) Current Stage : Bid Evaluation

Red indicates Non responsive.

Document Category	Name	Question	User Response
1. Copy of Advertisement	Kali Crops	Quotation Details	
		Is unconditional discount offered?	<input type="text"/> *
2. Bid Opening		Is Cross Discount applicable?	<input type="text"/> *
		Any Arithmetic error	<input type="text"/> *
		Is Price Loading applicable?	<input type="text"/> *
		Price Adjustment due to loading	<input type="text"/> *
		Is Technically Responsive?	<input type="text"/> *

21. Once Comparative Statement data is save the system will show the lowest evaluated responsive supplier (L1).

22. 'Post Qualification' link will be seen against L1;

Package : FZL Filters(TEQIP-II/2010/NITRO/NCB/4) Current Stage : Bid Evaluation

Pkg Details | Gen. of Bid | Adv. & Issue of Bid | Bid Opening | **Bid Evaluation** | Recomm. & Accept. Letter | Contract Award & WO | WCC & Payment

L1 Bidder will be automatically selected and displayed by the system once the 'Bid Evaluation' data is filled. Post Qualification link will appear against the L1 Bidder. Click on this link to perform the Post Qualification.

| [Print Bid Evaluation Form](#) | [Enter Bid Evaluation Data](#) |

Lowest Responsive after evaluation Kali Crop: Post Qualification Criteria

a. Click on the link to get a popup as shown below;

NIT Rourkela Package : Lab Development (TEQIP-II/2010/NITRO/NCB/1)		Current Stage : Work Completion Certificate and Payment
Red indicates Non responsive.		
Name	Question	User Response
SNS Corp Ltd	Quotation Details	
	Minimum Financial Turnover on at least 2 of the last five financial years	Yes <input type="button" value="v"/> *
	Satisfactorily completion of at least 1 similar work of value not less than 80% of estimated contract value in less than 3 years	Yes <input type="button" value="v"/> *
	Executed in one year the minimum quantities of work as specified in the bid document	Yes <input type="button" value="v"/> *
	Is the Electrical work being done by the bidder?	Yes <input type="button" value="v"/> *
	If Yes, then does the bidder have valid Electrical License?	Yes <input type="button" value="v"/> *
	If Bidder has valid electrical license, has the bidder performed similar electrical work in the past 1 year amounting to value, as specified in the bid document?	Yes <input type="button" value="v"/> *
	If electrical work is being done by sub-contractor, then does the sub-contractor have valid Electrical License?	Yes <input type="button" value="v"/> *
	IF sub-contractor has valid electrical license, has the bidder performed similar electrical work in the past 1 year amounting to value, as specified in the bid document?	Yes <input type="button" value="v"/> *
	Is the Sanitary work being done by the bidder?	Yes <input type="button" value="v"/> *
	If Yes. then does the bidder have valid Sanitary Work License?	Yes <input type="button" value="v"/> *

- b. Fill in the response for the selected Bidder
- c. If the Bidder becomes non-responsive in this step then automatically next lowest evaluated Bidder will be seen.
- d. Repeat the Post Qualification process for this Bidder.

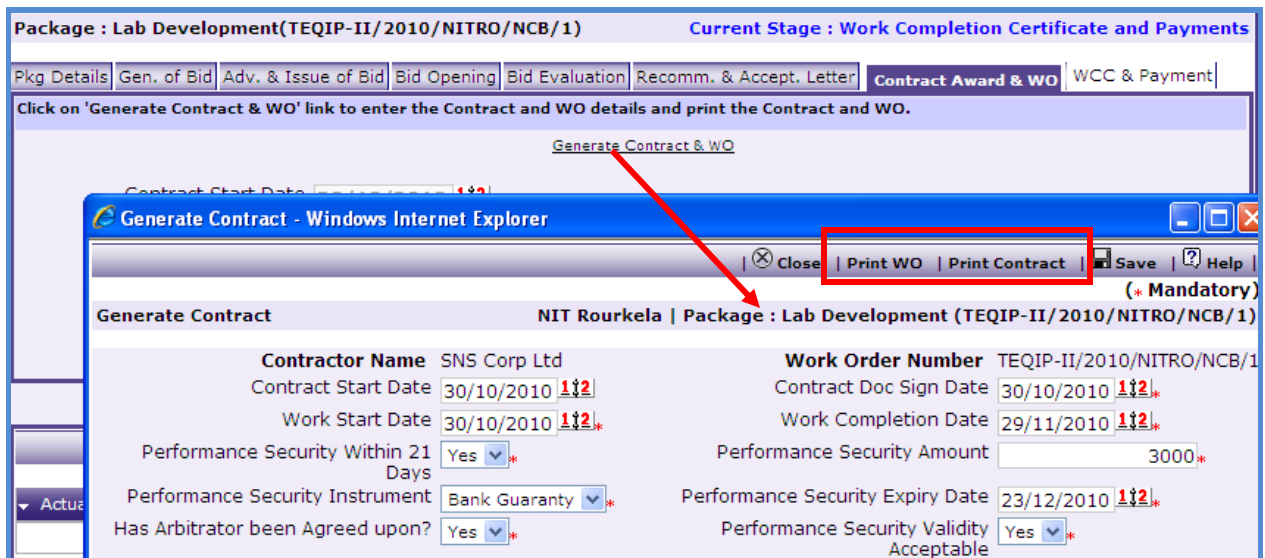
23. On the 'Documents' sub-tab;

- e. Click 'Add', select the 'Bid Evaluation' Category
- f. Browse and upload the document

24. Click on 'Move to Next Stage'. This will take the procurement to 'Recommend. & Accept. Letter' stage.

Package : FZL Filters(TEQIP-II/2010/NITRO/NCB/4)		Current Stage : Recommendation for Award and Acceptance Letter
<p>Pkg Details Gen. of Bid Adv. & Issue of Bid Bid Opening Bid Evaluation Recommend. & Accept. Letter Contract Award & WO WCC & Payment</p>		
L1 Supplier	<input type="text" value="Kali Crops"/>	*
Recommendation Comments	<input type="text"/>	*
Performance Security Amount	<input type="text"/>	*
Performance Security Period	<input type="text" value=""/>	(In Days)
<p>Click on 'Generate Acceptance Letter' link to generate the acceptance letter.</p> <p style="text-align: center;">Generate Acceptance Letter</p>		

25. If the lowest evaluated responsive supplier (L1) is not acceptable by the committee then another supplier can be selected in this stage. If another supplier is selected then enter the comments in the 'Comments' field and click 'Save'. On the 'Documents' sub-tab the evaluation report can be uploaded under the Evaluation Report category.
26. Click on 'Generate Acceptance Letter' to generate the Acceptance Letter. Signed Copy of the letter can be uploaded in the documents tab, for records.
27. Click on 'Move to Next Stage'. This will take the procurement to '**Contract Award and WO**' stage.
28. Click on 'Generate Contract & WO'. In the Pop up enter the following fields;
 - a. Contract Start Date
 - b. Contract Document signed – date
 - c. Work Start Date
 - d. Work Completion Date
 - e. Performance Security Within 21 Days?
 - f. Performance Security Amount
 - g. Arbitrator Agreed?
 - h. Performance Security Instrument
 - i. Performance Security Expiry Date
 - j. Has Arbitrator been Agreed upon?
 - k. Performance Security Validity Acceptable.



29. Click 'Save'
30. Click 'Print WO'. This will print the PO.
31. PO can be uploaded in the 'Documents' tab.
32. Click 'Print Contract'. This will print the Contract.

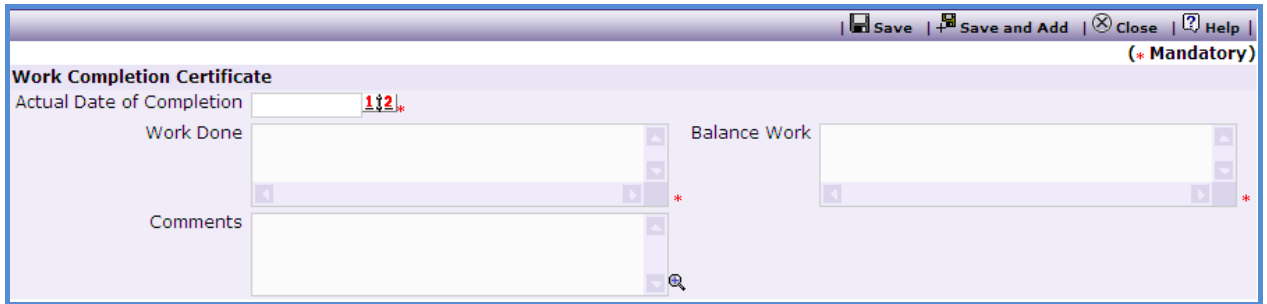
33. Contract can be uploaded in the 'Documents' tab.

34. Click on 'Move to Next Stage'. This will take the procurement to '**WCC & Payments**' stage.

35. On the '**Work Completion**' sub-tab;



a. Click on 'Add', a pop up will be seen as shown below;

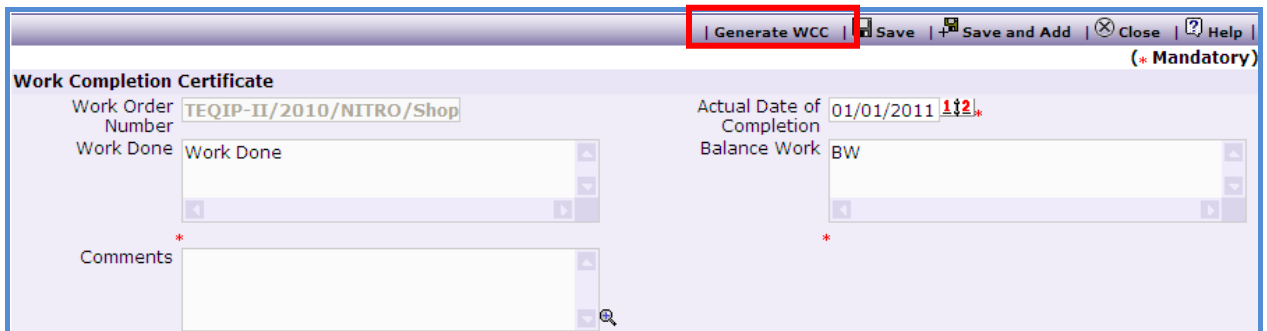


b. Enter data in the following fields;

- o Actual Date of Completion
- o Work Done
- o Balance Work

c. Click 'Save'

d. To Generate the WCC Report click on 'Generate WCC'



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

36. Environmental Checklist can be downloaded, checked and uploaded in the documents tab.

37. Payment details can be captured on the '**Payments**' sub-tab;



Package : MI Tanks(TEQIP-II/2010/NITRO/Shopping/2) Current Stage : Work Completion Certificate & Payments

Pkg Details Invitation Letter Quotation Opening Quotation Evaluation Recomm. for Award Letter of Acceptance Gen. of WO **WCC & Payment**

Use Work Completion Tab to enter work completion details and to generate Work Completion Certificate.

Use 'Payments' Tab to track payments.

Contractor Details (3) **Payments (2)** Work Completion (1) Documents

Help

Payment Term	Expected Completion Date	Expected Completion Period	Payment Percentage	Delete
Payment After delivery	01/01/2011	30	40.00	<input type="checkbox"/>
Payment after final check	28/02/2011	60	60.00	<input type="checkbox"/>

a. Click on the Payment Term and enter data in the following fields;

- Work Completed?
- Liquidated Damages Waived?
- WCC Generated?
- Actual Completion Period
- Comments (if Actual Completion Period is not as per planned)
- Actual Payment Date
- Comments (if Actual Payment Date is not as per planned)
- Actual Payment Amount
- Comments (if Actual Payment Amount is not as per planned)

b. Click 'Save'

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

38. 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 as shown below;

Question	User Response
Are all the payments done?	<input type="text"/> *
Is all the work completed?	<input type="text"/> *
Is the environmental checklist updated and uploaded?	<input type="text"/> *

39. Fill in the completion checklist then click on 'Complete Procurement Process' this will complete the procurement for that Package.

Use Work Completion Tab to enter work completion details and to generate Work Completion Certificate.

Use Payments Tab to track payments.

END – NCB Works

ICB

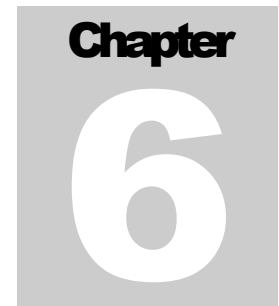
All steps for ICB are same as NCB except;

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

LIB

All steps for LIB are same as ICB except;

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



SERVICES METHOD

User Guide – Procurement Using Services Method

Services

QCBS

To initiate procurement of a package, refer “Initiate Procurements” in this document.

This section explains the procurement using QCBS method.

1. First stage is ‘Generation of TOR’.

Package : QCBS(TEQIP-II/2010/WB-kol/QCBS/4) (* Mandatory)
 Current Stage : Generation of TOR

Pkg Details | **TOR** | Adv. and EOI | Shortlisting | RFP | Issue of RFP | Tech. Eval | Financial Opening | Contract Gen. | Contract Award and Payments

Click 'TOR Details' link to enter TOR information. Enter Last date of EOI submission and generate TOR document using link 'Generate TOR'. Upload verified TOR document in Documents Tab under 'TOR' category before you proceed to next step.

Last Date & Time of EOI Submission *(hh:mm)

| TOR Details | Generate TOR |

Purchase Committee (3) Documents

Purchase Committee Member Name	Designation	Role In Purchase Committe	Delete
TRILOK M.	VP		<input type="checkbox"/>
PRAKASH MAHAJAN	AVP		<input type="checkbox"/>
ANIRUDHA DESHPANDE	MKT MANAGER		<input type="checkbox"/>

2. On the 'TOR' tab enter data in the following fields;
 - Last Date & Time of EOI Submission
3. Click 'Save'
4. Click on the "TOR Details" link, a pop up will be seen as shown below;

Save | Close | Help | (* Mandatory)

TOR Details University of Calcutta | Package : QCBS (TEQIP-II/2010/WB-kol/QCBS/4)

Background

Precise Statement of Objectives

Scope of Services

Schedule of Completion of Tasks

Data/Services/facilities to be Provided by Client

Final Output Required

Composition of Review Committee

Procedure for Review

List of required Key Professional's positions

5. Fill in the information and click 'Save'.
6. Click on 'Generate TOR' link to generate TOR document.
 - Make changes to the document if required; this will be the final TOR document.
34. On the 'Documents' sub-tab;
 - a. Click 'Add', a popup will be shown as below

- b. Browse the document, select Document Category 'TOR', enter description regarding the document and upload the document.

7. On the 'Purchase Committee' sub-tab;

Purchase Committee Member Name	Designation	Role In Purchase Committee	Delete
TRILOK M.	VP		<input type="checkbox"/>
PRAKASH MAHAJAN	AVP		<input type="checkbox"/>
ANIRUDHA DESHPANDE	MKT MANAGER		<input type="checkbox"/>

- a) By default, members of Purchase Committee defined for your institution will be displayed.
- b) You can add, edit or delete members from the list. Please remember that the changes will be applicable only for the current procurement.
- c) Click 'Add' link to add new members to the procurement committee of the current procurement. A pop up will be seen as shown below;

The screenshot shows a web browser window with the title "Purchase Committee - Windows Internet Explorer". The browser's menu bar includes "Save", "Save and Add", "Close", and "Help". The main content area contains a form with the following fields:

- Purchase Committee Member Name**: A text input field with a red asterisk and the label "(* Mandatory)" to its right.
- Designation**: A text input field.
- Role In Purchase Committee**: A text input field.

- o Enter Member Name, Designation and his role in Purchase Committee.
 - o Click 'Save' or 'Save and Add' if you want to add more members.
- d) To edit an existing Purchase Committee member,
- o Click on link at name of the committee member. A pop up will be seen as shown above for adding new member.
 - o Make necessary changes to the information
 - o Click on 'Save' link.
- e) To delete an existing Purchase Committee member, mark 'Delete' checkbox for the member and click on 'Delete' link.
8. 'Move to Next Stage' link will move the procurement to the next stage.
9. This will send the procurement for approval to NPIU. The process cannot proceed further unless NPIU Procurement Coordinator approves the TOR.
10. Approval of TOR (**Only For NPIU Procurement Coordinator**)
- Access Prior Review page by **Procurement-> Process Tree Node->Prior Reviews**.
 - NPIU Procurement Coordinator enters following details regarding World Bank Approval on TOR.
 - o Is TOR approved by World Bank
 - o TOR Approval Date
11. In Document Tab, TOR document has been uploaded. Go to Documents Tab, click on name of the document and download the document for review.
12. Click on "Approve" link to approve the TOR. Enter comments. This will move the process to next stage i.e. "Advertisement and Issue of EOI"
13. Click on "Reject" link if you wish to suggest changes. You can enter suggestions in Comments dialog box.
14. Next stage is '**Advertisement and Issue of EOI**'.

Package : QCBS(TEQIP-II/2010/WB-kol/QCBS/5) (* Mandatory)
 Current Stage : Adv & Issue of EOI

Plg Details | TOR | **Adv. and EOI** | Shortlisting | RFP | Issue of RFP | Tech. Eval | Financial Opening | Contract Gen. | Contract Award and Payments

As and when EOI is issued, enter Consultant details using Consultant Details tab.

Generate Advertisement

Local Paper Name (s) * Date of Advertisement(Local) 1/2/ *
 National Paper Name (s) * Date of Advertisement(National) 1/2/ *
 Actual Publication Date (Local) 1/2/ Actual Publication Date (National) 1/2/

Consultant Details (0) **Documents**

Document Category	File Name	Description	Uploaded By	Uploaded Date	Delete
1. TOR					
	TOR.doc	gfhg	mihir	15/10/2010	<input type="checkbox"/>

15. Click 'Generate Advertisement' link to generate advertisement for the current procurement. Advertisement will be generated in form of MS Word Document.
16. You can make changes to the Advertisement and upload the final advertisement in the system in Documents tab under 'Advertisement' Category.
17. Enter following details regarding publishing of the advertisement and save.
 - Local Paper Name(s)
 - Date of Advertisement(Local)
 - National Paper Name (s)
 - Date of Advertisement(National)
18. Enter following details about actual advertisement dates.
 - Actual Publication Date in local paper
 - Actual Publication Date in National paper
19. Whenever you issue EOI Document to consultants, enter details about consultants on 'Consultant Details' sub-tab;
 - a) Click 'Add', a pop up will be seen as shown below;

Save | Save and Add | Close | Help | (* Mandatory)

Consultant Details University of Calcutta | Package : QCBS (TEQIP-II/2010/WB-kol/QCBS/5)

Consultant Name * Select Address

Consultant

City * State *

Pin Code * Phone Number *

Name Of Representative * Email ID *

FAX Number

TAN Number PAN Number

Tax Number

b) Enter data in the following fields;

- Consultant Name
- Address
- City
- State
- Contractor Source
- Email ID
- Pin Code
- Name Of Representative
- Phone Number
- Fax Number
- PAN Number
- TAN Number
- Tax Number

c) Click 'Save'

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

20. Click on "Move to next stage" to proceed to next stage "**EOI Opening & Short listing of Consultants**".

Stage Information | Cancel Procurement | Save | Back | Help |

(* Mandatory)

Package : QCBS(TEQIP-II/2010/WB-kol/QCBS/5) Current Stage : EOI Opening & Shortlisting of Consultants

Pkg Details | TOR | Adv. and EOI | **Shortlisting** | RFP | Issue of RFP | Tech. Eval | Financial Opening | Contract Gen. | Contract Award and Payments

Step 1: Make sure all Consultants are added in 'Consultant Details' Tab who have submitted EOI. Enter EOI Opening Data using link 'Enter EOI Opening Data'. Print and upload signed copy of the EOI Opening form in Documents Tab.

EOI Opening Date : (hh:mm) | [Enter EOI Opening Data](#) | [Print EOI Opening Form](#) |

Step 2: Shortlist consultants by clicking link 'Shortlisting Consultants'.

| Shortlisting of Consultants |

Consultant Details (3) Documents

Add | Delete | Select All | Help |

Document Category	File Name	Description	Uploaded By	Uploaded Date	Delete
1. TOR					
	TOR.doc	gfhg	mihir	15/10/2010	<input type="checkbox"/>
2. Advertisement					
	Ad.doc	Advertisement	mihir	15/10/2010	<input type="checkbox"/>

21. Enter EOI Opening Date and Time and Click Save.
22. Make sure the "Consultant Details" sub-tab lists all consultants who have submitted their EOI. You can add consultant details by clicking on "Add" link.
23. Click on 'Print EOI Opening Form' link to download EOI Opening Form. During the EOI opening process, this form can be used to capture data.
24. You need to enter this data in the system. Click "Enter EOI Opening Data" link to enter the data;

Consultant Name

University of Calcutta | Package : QCBS (TEQIP-II/2010/WB-kol/QCBS/5) Current Stage : EOI Opening & Shortlisting of Consultants

Red indicates Non responsive.

Name	Question	User Response
Compulink Systems Ltd		
	Is EOI Received?	Yes *
MPphasis		
	Is EOI Received?	Yes *
Yashodhan Systems		
	Is EOI Received?	Yes *

Total Records :3

- The page lists name of all consultants listed on “Consultant Details” sub-tab.
- Fill responses for all consultants.

25. Upload EOI documents of all consultants who have submitted their EOI.

- In “Consultant Details” sub-tab, click on consultant name. This will popup Supplier details page as follows

(* Mandatory)

Consultant Details University of Calcutta | Package : QCBS (TEQIP-II/2010/WB-kol/QCBS/5)

Consultant Name	<input type="text" value="Yashodhan Systems"/> * Select Consultant	Address	<input type="text" value="Pune"/>
City	<input type="text" value="Pune"/> *	State	<input type="text" value="MH"/> *
Pin Code	<input type="text" value="411038"/> *	Phone Number	<input type="text" value="25386586"/> *
Name Of Representative	<input type="text" value="Yashodhan"/> *	Email ID	<input type="text" value="yash@hotmail.com"/> *
FAX Number	<input type="text"/>	PAN Number	<input type="text"/>
TAN Number	<input type="text"/>	Tax Number	<input type="text"/>
EOI Document	<input type="text"/> <input type="button" value="Browse..."/>		

- Browse EOI document of the consultant.
 - Click 'Save' link to upload the document in the system.
26. Now you need to shortlist among consultants who have submitted their EOIs. Enter Date of Short listing and Click 'Save'.
27. Click on link 'Shortlisting of Consultants' to do shortlisting among consultants. A popup will be shown as below;

Save | Close | Show History | Help

Consultant Name

University of Calcutta | Package : QCBS (TEQIP-II/2010/WB-kol/QCBS/5) | Current Stage : EOI Opening & Shortlisting of Consultants

Red indicates Non responsive.

Name	Question	User Response
Compulink Systems Ltd		
	Is Shortlisted?	Yes <input type="button" value="v"/> *
MPphasis		
	Is Shortlisted?	Yes <input type="button" value="v"/> *
Yashodhan Systems		
	Is Shortlisted?	Yes <input type="button" value="v"/> *

Total Records :3

- This page will list consultants who have submitted their EOI.
 - Fill responses for all consultants and click 'Save'.
28. Upload signed EOI Opening Form in Documents sub-tab under category "EOI Opening Form".
29. 'Move to Next Stage' link will move the procurement to the next stage.
30. This will send the EOI shortlisting results for approval to NPIU. The process cannot proceed further unless NPIU Procurement Coordinator approves the EOI Short listing.
31. Approval of Shortlisting of EOI (**Only For NPIU Procurement Coordinator**)
- Access Prior Review page by **Procurement-> Process Tree Node->Prior Reviews.**

- In Document Tab, EOI Opening Form document has been uploaded. Go to Documents Tab, click on name of the document and download the document for review.
 - Enter following details regarding World Bank Approval on short listing of EOI.
 - Is EOI approved by World Bank
 - EOI Approval Date
32. Click on “Approve” link to approve the EOI Short-listing and enter comments. This will move the process to next stage **“RFP Preparation”**
33. Click on “Reject” link if you wish to suggest changes. You can enter suggestions in Comments dialog box.
34. Next stage is **‘RFP Preparation’**.

Package : QCBS(TEQIP-II/2010/WB-kol/QCBS/5) Current Stage : RFP Preparation

Pkg Details | TOR | Adv. and EOI | Shortlisting | **RFP** | Issue of RFP | Tech. Eval | Financial Opening | Contract Gen. | Contract Award and Payments

Enter details about RFP. Click 'Instruction to Consultant' link to enter information to be populated in the DataSheet. Define Criteria for technical evaluation using 'Technical Criteria' tab. Define all Payment Terms using 'Milestones' tab. Generate RFP document using link 'Generate RFP'. Upload verified RFP document in Documents Tab under 'RFP' category before you proceed to next step.

Type of Contract: Lumpsum*
 Pre proposal Venue: NPIU*
 Proposal Submission Date: 24/10/2010 11:00 *(hh:mm)
 Pre-proposal Meeting Date: 20/10/2010 11:00 *(hh:mm)

[Instruction to Consultants](#) | [Generate RFP](#)

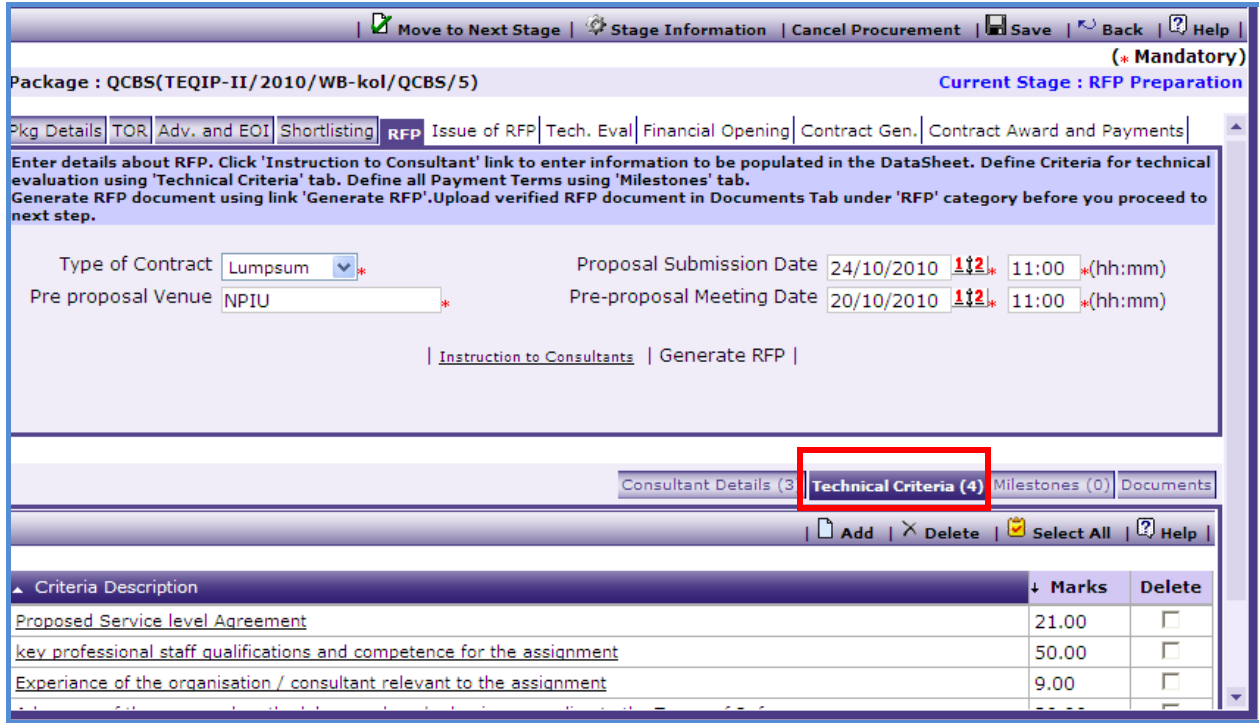
Consultant Details (3) | **Technical Criteria (4)** | Milestones (0) | Documents

Criteria Description	Marks	Delete
Proposed Service level Agreement	21.00	<input type="checkbox"/>
key professional staff qualifications and competence for the assignment	50.00	<input type="checkbox"/>
Experience of the organisation / consultant relevant to the assignment	9.00	<input type="checkbox"/>

35. Enter following information regarding the RFP
- Type of Contract – Time Based or Lumpsum
 - Proposal Submission Date
 - Pre-proposal Meeting Date and Time
 - Pre-proposal Venue
36. Next, click on link ‘Instruction to Consultants’ to enter information that will appear in datasheet inside RFP document. A popup will be shown as below.

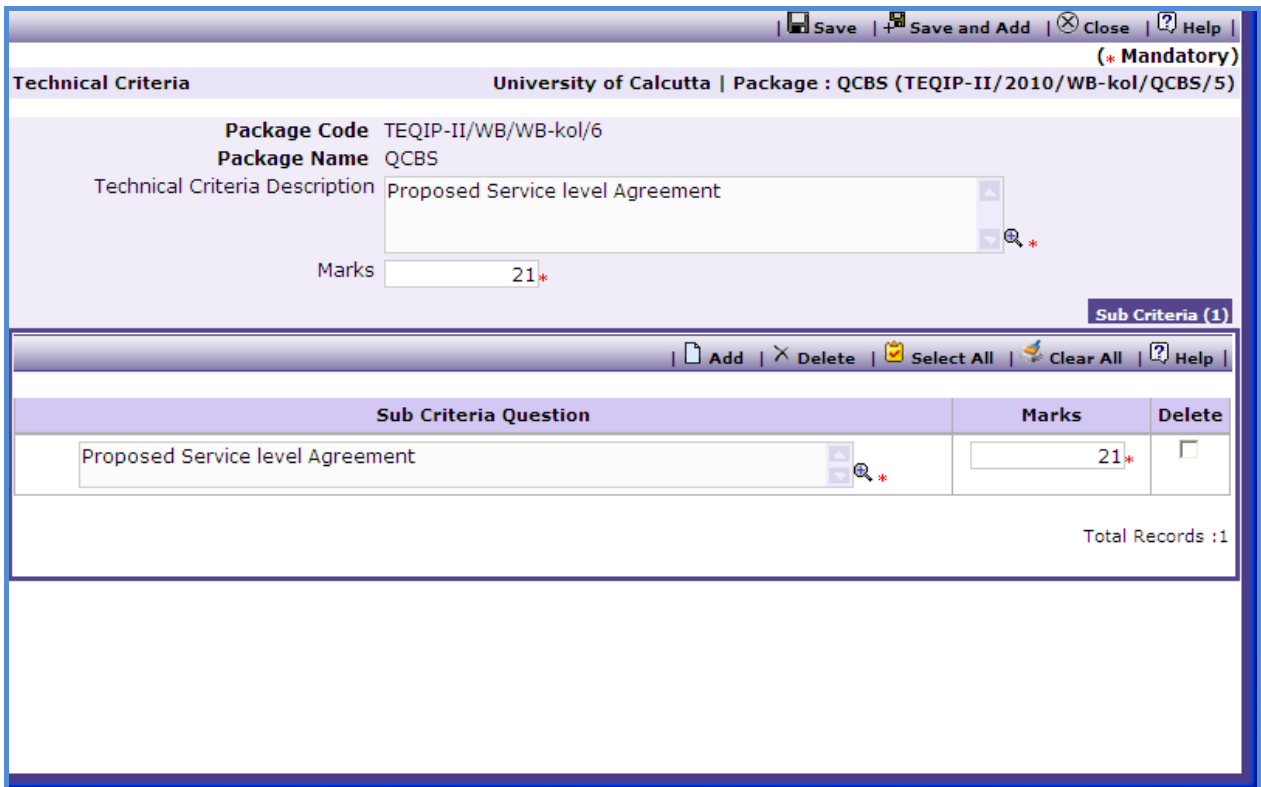
Package Level Data	
Reference No : TEQIP-II/2010/WB-kol/QCBS/5	
Package Name : QCBS	
Technical Criteria	
Minimum Passing Score : <input type="text"/> *	
Weightage For Technical Proposal : <input type="text"/> *	
Weightage For Financial Proposal : <input type="text"/> *	
Instruction To Consultants -Data Sheet	
Paragraph Reference	
1.1	Name of the Client: University of Calcutta Method of selection: Quality and Cost Based Selection [QCBS]:
1.2	Financial Proposal to be submitted together with Technical Proposal : <input type="checkbox"/> Name of the assignment is: QCBS
1.3	A pre-proposal conference will be held:Yes. The Client's representative is: <input type="text"/>
1.4	The Client will provide the following inputs and facilities: <input type="text"/>
1.12	Proposals must remain valid <input type="text"/> *days after the submission date, i.e. until: <input type="text"/> * <input type="text"/> *
2.1	Clarifications may be requested not later than <input type="text"/> * The address for requesting clarifications is: <input type="text"/>
3.3(a)	Shortlisted Consultants may associate with other shortlisted Consultants: <input type="text"/> * [Enter value in one of the following two sentences]

37. The popup displays related Paragraph section in datasheet for each field. Fill in data in required fields and click 'Save'.
38. Shortlisted Consultants tab displays list of consultants shortlisted for sending the RFP document. (Selected in EOI short-listing stage)
39. Define criteria for evaluation of technical proposals. On the 'Technical Criteria' sub-tab, By default, this tab shows default technical criteria defined in the system.



40. You can add new criteria, edit or delete existing criteria in the list.

a) Click 'Add', a pop up will be seen as shown below;



b) Enter data in the following fields;

- o Technical Criteria Description
 - o Marks
- c) On Sub-criteria sub-tab, define sub-criteria questions which together will constitute the Technical Criteria. You can add new sub-criteria, edit or delete existing sub-criteria from the list.
- d) Click 'Add' link to add new sub-criteria Enter data in following fields of Sub-criteria
- o Sub Criteria Question
 - o Marks
- e) Repeat (d) to add more sub-criteria.
- f) Make sure total of marks for all sub-criteria matches with Marks entered for the Technical criteria.
- g) Click 'Save' or 'Save and Add' (if you want to create more technical criteria)
- h) To add another Technical Criteria, repeat steps from (d) to (g).
41. Make sure that total of all technical criteria is 100. The total should not be less or more than 100.
42. You can define Delivery and Payment Milestones in sub-tab "Milestones"

The screenshot shows a web browser window titled "Milestones - Windows Internet Explorer". The browser's address bar and menu bar (Save, Close, Help) are visible. The main content area displays a form titled "Payments" with a "(+ Mandatory)" label. The form contains the following fields:

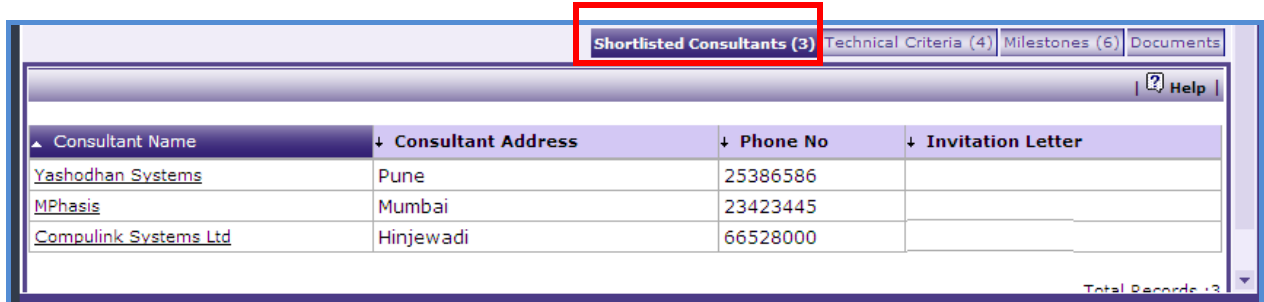
- Milestone Type: A dropdown menu with a blue arrow and a red asterisk.
- Milestone Name: A text input field with a red asterisk.
- Milestone Description: A text area with a search icon.
- Expected Payment Date: A date input field with a red asterisk.
- Milestone Amount: A text input field with a red asterisk and the label "(for Payment milestones)".
- Expected Completion Date: A date input field with a red asterisk.
- Expected Completion Period: A text input field with a red asterisk and the label "(for Delivery milestones)".

43. Enter following information regarding milestone
- Milestone Type – Delivery or Payment
 - Milestone Name
 - Milestone Description
 - Expected Payment Date
 - Milestone Amount (For Payment Milestone)
 - Expected Completion Date

- Expected Completion Period (For Delivery Milestone)
44. You can define one or more delivery/payment milestones.
 45. Click link "Generate RFP" to generate the RFP document.
 46. Upload verified RFP document in Documents tab under category "RFP"
 47. Click on Move to next stage to send the RFP for approval to NPIU.
 48. Approval of RFP (**Only For NPIU Procurement Coordinator**)
 - Access Prior Review page by **Procurement-> Process Tree Node->Prior Reviews.**
 - In Document Tab, RFP document has been uploaded. Go to Documents Tab, click on name of the document and download the document for review.
 - Enter following details regarding World Bank Approval on RFP
 - Is RFP approved by World Bank
 - RFP Approval Date
 49. Click on "Approve" link to approve the EOI Short-listing and enter comments. This will move the process to next stage **"Issue of RFP"**
 50. Click on "Reject" link if you wish to suggest changes. You can enter suggestions in Comments dialog box.
 51. Next stage is **'Issue of RFP'**.

52. As first step, generate invitation letters for all shortlisted consultants by clicking on link "Generate Invitation Letters"

53. Invitation letters will be generated by a separate process running in background. When invitation letters are generated, in “Shortlisted Consultants” tab, a link will appear for each consultant to download his invitation letter.



Consultant Name	Consultant Address	Phone No	Invitation Letter
Yashodhan Systems	Pune	25386586	
MPhasis	Mumbai	23423445	
Compulink Systems Ltd	Hinjewadi	66528000	

54. You can download the invitation letter for a consultant along with RFP document (in documents tab). You can issue these documents either by combining in one document or as two separate documents to the consultant.

55. Whenever Pre-proposal meeting is conducted, enter following details about pre-proposal meeting.

- Actual Pre-proposal Meeting Date
- Pre-proposal Meeting MOM
- Are clarifications issued to all the consultants : This can be Yes/No or NA
- Date of clarification issued
- Clarification Details

56. Click link “Move to next stage” to move to stage “**Technical Evaluation**” stage.

Technical Proposal Opening - Windows Internet Explorer

Save | Close | Show History | Help

Consultant Name

University of Calcutta | Package : QCBS (TEQIP-II/2010/WB-kol/QCBS/5) | Current Stage : Technical Evaluation

Red indicates Non responsive.

Name	Question	User Response
Compulink Systems Ltd		
	Is Technical Proposal Received?	<input type="text"/> *
	Is Technical Proposal Valid?	<input type="text"/> *
	Is Duly Signed	<input type="text"/> *
	Is Joint Venture proposed?	<input type="text"/> *
MPphasis		
	Is Technical Proposal Received?	<input type="text"/> *
	Is Technical Proposal Valid?	<input type="text"/> *
	Is Duly Signed	<input type="text"/> *
	Is Joint Venture proposed?	<input type="text"/> *
Yashodhan Systems		
	Is Technical Proposal Received?	<input type="text"/> *

Total Records : 12

60. Fill responses for all consultants and save.

61. System will evaluate responsive consultants based on your responses to given questions. For responsive consultants link "Technical Evaluation" will appear in front of Consultant Name.

62. Click "Technical Evaluation" link; a popup will be shown as below

Consultant Name : Compulink Systems Ltd			Total Marks : 86
Technical Score	University of Calcutta Package : QCBS (TEQIP-II/2010/WB-kol/QCBS/5)(TEQIP-II/2010/WB-kol/QCBS/5)		
▼ 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	10	<input type="text" value="9"/> *
	Work plan in responding to the Terms of Reference	10	<input type="text" value="9"/> *
Experience of the organisation / consultant relevant to the assignment			
	Experience of the organisation / consultant relevant to the assignment	9	<input type="text" value="8"/> *
key professional staff qualifications and competence for the assignment			
	key professional staff qualifications and competence for the assignment	50	<input type="text" value="45"/> *
Proposed Service Level Agreement			
	Proposed Service level Agreement	21	<input type="text" value="15"/> *
			Total Records :5

63. Enter marks for each consultant against all technical criteria and sub-criteria.
64. System will calculate and show total marks of the consultant (highlighted in above screenshot)
65. System will calculate and show technical score of all consultants in "Consultant Score" sub-tab who have exceeded the minimum score mentioned in the RFP document.
66. Click 'Print Tech Evaluation Report' link to print technical evaluation report.
67. Upload signed technical Proposal Meeting Form in Documents tab under category "MoM of Technical Proposal Opening".
68. Upload signed technical evaluation report in Documents tab under category "Signed Technical Evaluation Format".
69. Click "Move to next stage" to send technical evaluation for approval to NPIU.
70. Approval of Technical Evaluation (**Only For NPIU Procurement Coordinator**)

- Access Prior Review page by **Procurement-> Process Tree Node->Prior Reviews.**
 - In Document Tab, Technical Evaluation Report and Technical Proposal Opening Meeting MOM have been uploaded. Go to Documents Tab, click on name of the document and download the document for review.
 - Enter following details regarding World Bank Approval on Technical Evaluation
 - Is Tech Evaluation approved by World Bank
 - Approval Date
71. Click on “Approve” link to approve the technical evaluation and enter comments. This will move the process to next stage **“Financial Evaluation”**
72. Click on “Reject” link if you wish to suggest changes. You can enter suggestions in Comments dialog box.
73. Next stage is **‘Financial Evaluation’.**

The screenshot shows the 'Financial Opening' stage of a procurement process. The interface includes a navigation bar with options like 'Move to Next Stage', 'Stage Information', 'Cancel Procurement', 'Save', 'Back', and 'Help'. The package details are 'QCBS(TEQIP-II/2010/WB-kol/QCBS/5)' and the current stage is 'Financial Evaluation & Recomm Of Award'. The 'Financial Opening' tab is active, showing a form to enter the financial proposal opening date and time. Below this, there is a table of shortlisted consultants.

↓ Consultant Name	↓ Technical Score	↓ Financial Score	↓ Combined Score	▲ Combined Rank
Yashodhan Systems	83.00			
MPhasis	78.00			
Compulink Systems Ltd	86.00			

74. Enter Financial Proposal Opening Date and Click Save.
75. Click on ‘Print Fin Proposal Opening Form’ link to download Financial Proposal Opening Form. During the Financial Proposal opening process, this form can be used to capture data.
76. You need to enter this data in the system. Click “Enter Financial Proposal Opening Data” link to enter the data;

Save Close Show History Help		
Consultant Name <input type="text"/>		
University of Calcutta Package : QCBS (TEQIP-II/2010/WB-kol/QCBS/5)		Current Stage : Financial Evaluation & Recomm Of Award
Red indicates Non responsive.		
Name	Question	User Response
Compulink Systems Ltd		
	Price in INR	1200000.00*
MPhasis		
	Price in INR	1000000.00*
Yashodhan Systems		
	Price in INR	1600000.00*
Total Records : 3		

77. Enter price in INR for all consultants listed on the page and save.

78. System will automatically calculate Financial Score and Combined Score for all listed consultants on "Consultant Score" sub-tab.

79. Consultant having highest combined score is selected as L1 Consultant by the system.

Package : QCBS(TEQIP-II/2010/WB-kol/QCBS/5) Current Stage : Financial Evaluation & Recomm Of Award (* Mandatory)

Enter Financial Proposal Opening Data. Upload signed copy of the Financial Proposal Opening form in Documents Tab.

Fin Proposal Opening Date 01/11/2010 11:00 *(hh:mm) | Enter Financial Proposal Opening Data | Print Financial Opening Form

L1 Consultant Compulink Systems Ltd
 Recommended Consultant Compulink Systems Ltd

Contract Value 1200000
 Recomm. Comments

Shortlisted Consultants (3) Consultant Score (3) Milestones (5) Documents

↓ Consultant Name	↓ Technical Score	↓ Financial Score	↓ Combined Score	↓ Combined Rank
Compulink Systems Ltd	86.00	83.33	85.47	1
MPhasis	78.00	100.00	82.4	2
Yashodhan Systems	83.00	62.50	78.9	3

80. Consultant having highest combined score is selected as L1 Consultant by the system.

81. You can recommend same or different consultants (technical responsive) as L1 consultant with your recommendation comments.

82. Click link "Move to next stage" to send Financial Evaluation for approval to NPIU.

83. Approval of Financial Evaluation (**Only For NPIU Procurement Coordinator**)

- Access Prior Review page by **Procurement-> Process Tree Node->Prior Reviews.**
- Enter following details regarding World Bank Approval on Financial Evaluation
 - Is Fin Evaluation approved by World Bank
 - Approval Date

84. Click on "Approve" link to approve the financial evaluation and enter comments. This will move the process to next stage "**Contract Generation**"

85. Click on "Reject" link if you wish to suggest changes. You can enter suggestions in Comments dialog box.

Package : QCBS(TEQIP-II/2010/WB-kol/QCBS/5) Current Stage : Contract Generation

Enter negotiation meeting details. Upload negotiation meeting related documents in Documents tab.
 Enter Contract Details using link 'Enter Contract Details'.
 Define Payment and Delivery milestones.
 Generate the contract and upload draft contract in Documents Tab.

Date Of Negotiation Negotiation Comments

[Enter Contract Details](#) | [Generate Contract](#)

Document Category	File Name	Description	Uploaded By	Uploaded Date	Delete
1. TOR	TOR.doc	gfhg	mihir	15/10/2010	<input type="checkbox"/>
2. Advertisement					

86. Enter following details regarding Negotiation meeting.

- Date of Negotiation
- Negotiation Comments

87. Click on Save.

88. Click link 'Contract Details'; a popup will be displayed as follows :-

Contract Generation University of Calcutta | Package : QCBS (TEQIP-II/2010/WB-kol/QCBS/5)

Contract Details :

Member In Charge * Authorised Representative of Client *

Date of commencement of services * Delivery period (In months) *

Arbitration Proceeding to held at * Interest Rate (%) *

Award Generation Checklist :

Is Advanced Payment Required ? * Bank Guantee Submitted ? *

Payment Milestone Defined ? * Arbitrator Agreed ? *

89. Fill in information on the page and Click 'Save'.

90. Upload negotiation meeting related documents in “Documents” sub-tab under category “Negotiation Meeting MOM”.
91. Generate Control using link ‘Generate Contract’.
92. Upload draft copy of contract in “Documents” sub-tab under category “Draft Contract”.
93. Click link “Move to next stage” to send the contract for approval to NPIU.
94. Approval of Contract (**Only For NPIU Procurement Coordinator**)
 - Access Prior Review page by **Procurement-> Process Tree Node->Prior Reviews.**
 - Enter following details regarding World Bank Approval on Financial Evaluation
 - Is Contract approved by World Bank
 - Approval Date
95. Click on “Approve” link to approve the contract and enter comments. This will move the process to next stage **“Contract Award”**
96. Click on “Reject” link if you wish to suggest changes. You can enter suggestions in Comments dialog box.
97. Next stage is **“Contract Award”**.

Package : QCBS(TEQIP-II/2010/WB-kol/QCBS/5) Current Stage : Award of Contract & Payments (* Mandatory)

Pkg Details | TOR | Adv. and EOI | Shortlisting | RFP | Issue of RFP | Tech. Eval | Financial Opening | Contract Gen. | **Contract Award and Payments**

Upload signed copy of the contract in Document Tab
Track Payment and Delivery Milestones using Milestones Tab.

Contract sign date

Shortlisted Consultants (3) | Consultant Score (3) | **Milestones (6)** | Documents

↓ Milestone Name	▲ Expected Completion Date	Expected Completion Period	Milestone Amount	Delete
10% SRS Signoff			120,000.00	<input type="checkbox"/>
15% SystemTesting			180,000.00	<input type="checkbox"/>
Warranty Starts			360,000.00	<input type="checkbox"/>
6 Months of Warranty			120,000.00	<input type="checkbox"/>

98. Enter Date of signing of contract and save.
99. Upload signed copy of contract in Documents sub-tab under category “Signed Copy of Contract”.
100. You can track defined payment milestones using “Milestones” sub-tab.

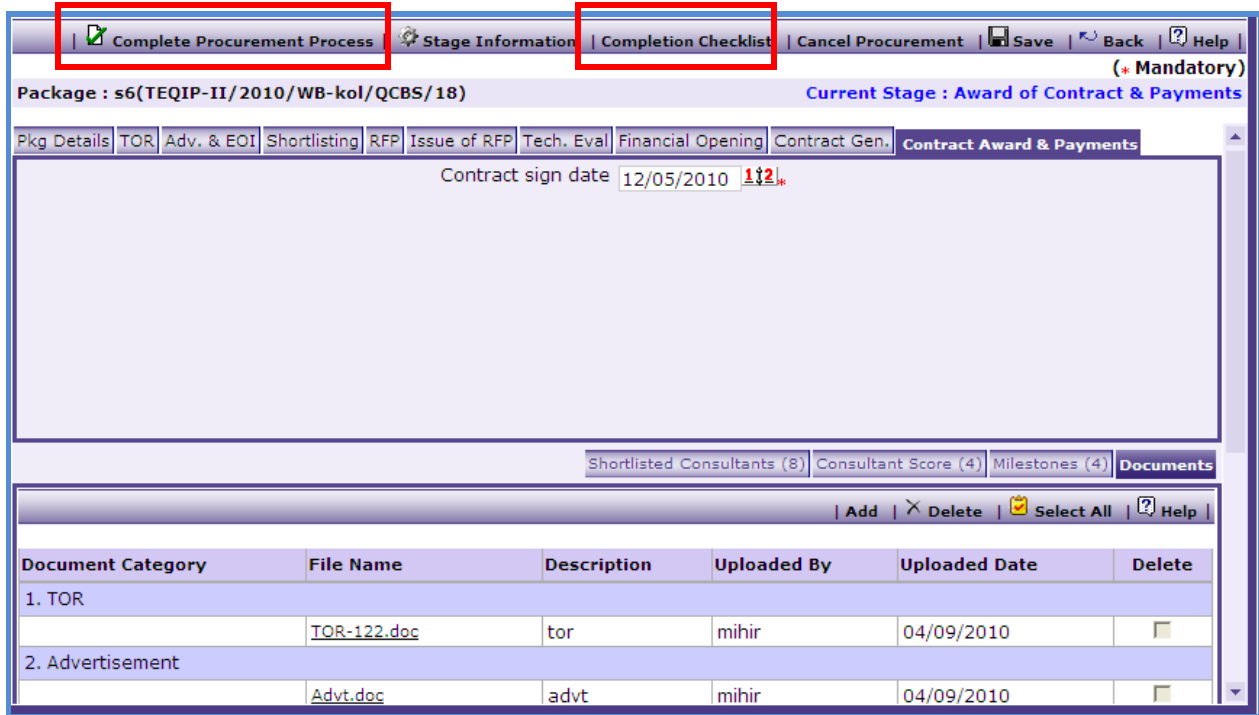
a) Click on link at milestone name. You will get popup as shown below

b) Enter data in the following fields;

- i) Cheque/Draft Number
- ii) Actual Payment Date
- iii) Payment Date Comments (if Expected Payment Date is different than Actual Payment Date)
- iv) Actual Payment Amount
- v) Payment Amount Comments (if Milestone Amount is different than actual payment amount)
- vi) Actual Completion Period (if Expected Completion Period is different than Actual Completion Period)
- vii) Actual Completion Date

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

101. Once all the details for all the payments are recorded this Procurement can be marked as complete. Click on 'Complete Procurement Process' this will complete the procurement for that Package/ Service.
102. System doesn't allow completing the process unless you enter details about actual payment against all payment milestones.



- 103. Click link 'Completion Checklist' to enter checklist for completion of the process.
- 104. Click link 'Complete Procurement Process' to mark the procurement as Complete.

FBS/SSS/LCS/ CQS

Procurement of services using FBS/SSS/LCS/CQS are same as QCBS but differ from QCBS in the following manner

Stages Involved

The table below shows the applicable stages for each of the methods:

Stage Method	TOR	EOI	Shortlist of firms	RFP	Technical Evaluation	Combined Evaluation	Negotiation Allowed
SSS	Yes	No	No	Yes	Yes	Yes	Yes
CQS	Yes	Yes	No	Yes	Yes	Yes	Yes
LCS	Yes	Yes	Yes	Yes	Yes	No	No
FBS	Yes	Yes	Yes	Yes	Yes	No	No

Fixed Based Selection (FBS)

- 105. The RFP shall indicate the available budget and request the consultants to provide their best technical and financial proposals within the budget.

106. Technical Proposal Evaluation of all proposals shall be carried out first as in the QCBS method.
107. The financial proposal Evaluation will be carried only for proposals which have quoted price within indicated budget. Proposal which exceed the indicated budget shall be rejected.
108. The Consultant who has submitted the highest ranked technical proposal among the rest shall be selected as L1 Consultant.
109. Rest of the process is same as QCBS.

Least Cost Selection (LCS)

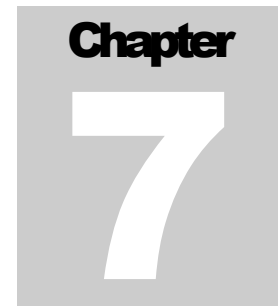
110. Technical proposals will be evaluated shall be carried out first as in the QCBS method.
111. Those securing less than the minimum qualifying mark are rejected, and the financial proposals of the rest will be done.
112. The firm with the lowest price shall then be selected as L1 consultant.
113. Rest of the process is same as QCBS.

Single Source Selection (SSS)

114. Only consultant will be added in Consultants tab. He will be invited for sending Technical and Financial Proposal.
115. Rest of the process is same as QCBS.

Consultant Qualification Selection (CQS)

116. TOR is prepared; expressions of interest will be evaluated. A shortlist is prepared after EOI evaluation, and the firm with the most appropriate qualifications and references is asked to submit a combined technical and financial proposal and then be invited to negotiate the contract.

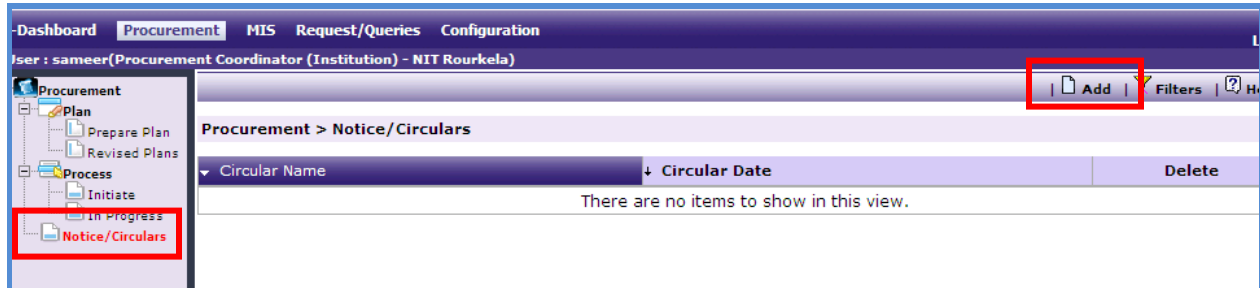


NOTICE/ CIRCULARS

User Guide – Notice/ Circulars

Notice/ Circulars

Notice/ Circulars can be generated and printed using this node. **Go to Procurement-> Notice/ Circulars**



1. Click on the 'Add'

2. Enter data in the following fields;

- Circular Name
- Circular Date
- Circular Description

3. Click 'Save'

4. Once saved a sub-tab listing the purchase committee member names will be shown;

Committee Member Name	Designation	Role in Procurement Committee	Delete
Prof. Pradip Rath	Professor	PC	<input type="checkbox"/>
Prof. Bidvadar Subudhi	Professor	CCI	<input type="checkbox"/>
Dr. Sharmili Das	Assistant Professor	AP	<input type="checkbox"/>

5. User can Add/ Modify the list of committee members.

6. Click on 'Print Circular' link to print the Circular.



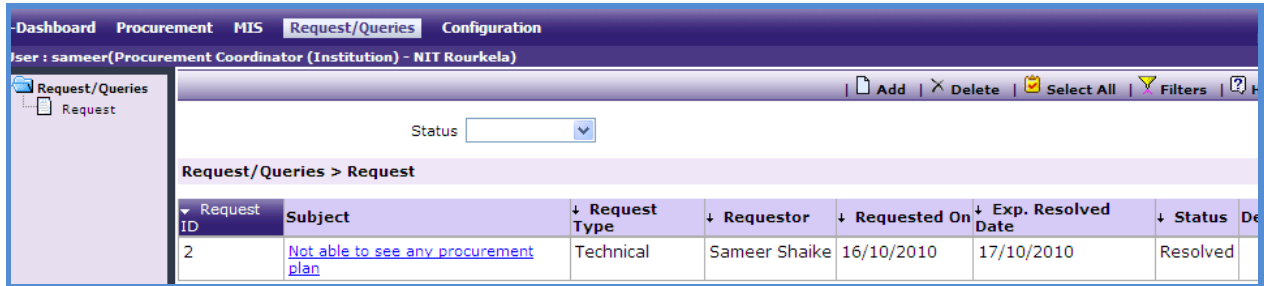
REQUEST/ QUERIES

User Guide – Request/ queries

Request/ Queries

Request/ Queries Module is an interface used for answering the queries/ requests raised by the users.

To submit a query/ request user can **go to Request/ Queries module**



The screenshot shows the 'Request/Queries' module interface. At the top, there are navigation tabs: Dashboard, Procurement, MIS, Request/Queries (selected), and Configuration. Below the tabs, the user is identified as 'User : sameer(Procurement Coordinator (Institution) - NIT Rourkela)'. The interface includes a 'Status' dropdown menu and a table of requests.

Request ID	Subject	Request Type	Requestor	Requested On	Exp. Resolved Date	Status	De
2	Not able to see any procurement plan	Technical	Sameer Shaik	16/10/2010	17/10/2010	Resolved	

1. Click on the 'Add'



The screenshot shows the 'Add' form in the 'Request/Queries > Request' section. The form includes the following fields:

- Request Type: A dropdown menu with a red asterisk indicating it is mandatory.
- Subject: A text input field with a red asterisk indicating it is mandatory.
- Description: A large text area with a red asterisk indicating it is mandatory.
- Priority: A dropdown menu.
- Severity: A dropdown menu.
- Exp. Resolved Date: A date input field with a red asterisk indicating it is mandatory.

At the top right of the form, there are buttons for 'Save', 'Save and Add', 'Back', and 'Help'. A red asterisk and the text '(* Mandatory)' are also present.

2. Enter data in the following fields;

- Request Type – User can select whether the request is 'Technical' or 'Process Related'.
- Subject
- Description
- Priority
- Severity
- Expected resolution date

3. Click 'Save'

4. Once saved, User will be able to add attachment using the 'Add Attachment' link, if required.

5. Email will be sent to all the users of NPIU.

6. All the users of NPIU will be able to see the request in the Request/ Queries module. As shown below;

Request ID	Subject	Request Type	Requestor	Requested On	Exp. Resolved Date	Status	Delete
2	Not able to see any procurement plan	Technical	Sameer Shaik	16/10/2010	17/10/2010	Resolved	<input type="checkbox"/>

7. NPIU user can click on the request to see the details of the request.

Discussion Thread

Request/Queries > Request

Request Type: Technical

Subject: Not able to see any procurement plan

Description: Not able to see any procurement plan under procurement.

Priority: High

Severity: Critical

Exp. Resolved Date: 17/10/2010

Status: Resolved

Attachments

Sr.No.	File Name	File Size (KB)	Attached By	Attached Date	Description	Delete
There are no items to show in this view.						

8. User can provide his/ her comments (resolution) using the discussion thread.

9. Change the Status.

10. Click 'Save'

11. Email will be sent to the requestor.

The requestor can click on the request and see the comments (resolution) in discussion thread.

If the user is ok 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. All the discussion threads will be recorded with the timestamp.



REPORTS GENERATION

User Guide – Reports Generation

Reports Generation

The reports are placed under the MIS module. **Go to MIS module**

1. **Institution user** – Institution user as has an option to provide 'From Date' and 'To Date'. Thus, user can mention the period for which they want to generate the report e.g. if the user wants to see the report for a month then he/ she can give the start date of the month in the 'From Date' and end date of the month in the 'To Date' field.

Report can be generated in any of the three formats PFD, HTML and Excel. Click on the format in which the report is required to be generated.

2. **SPFU user** – In addition to 'From Date' and 'To Date' the SPFU user will have an option to provide institution name as well. Thus SPFU user can generate the report for any institution under it.

If SPFU wants to see its own report then the institution field should be left blank.

3. **NPIU user** – NPIU user will be able to generate the reports for any SFPU, CFI or Institution.
 - To generate the report for a SPFU select the SPFU's name in the SPFU field

- To generate the report for a CFI leave the SPFU field blank and select the CFI name in the institution field.
- To generate the report for an institution select the SPFU name and then the institution name.
- To generate its own report (NPIU report) just provide the 'From Date' and 'To Date' leave the other fields blank.