IFAD OPEN – Project Procurement End-to-End System

GOODS ACTIVITY IMPLEMENTATION

USER TYPE: PMU
WHAT DOES THIS QUICK CARD COVER?

Goods Activity implementation:

• Start activity implementation
• Datasheet View
• Uploading Documents
• Date Information
• Adding Comments
• Activity Step Status
• Request IFAD No Objection
• Recall IFAD No Objection
• Amending an Activity Step
• Going Back One Step
• Restarting an Activity
• Completing Activity Step
• Bidders Table
• Bids tab
• Replanning Dates of Activity Steps
• Completing Activity Implementation
• Implementation of Activities with Multiple Lots
To start the implementation of an activity, you need to click on the code of the approved activity → then click on the “Dates” tab.
1. Click on the “Start implementation” button to start the implementation workflow;

2. In the pop-up window, click OK to confirm your choice and proceed.

3. The system will create a tab called “implementation” and generate a message to confirm that the workflow has started.
### DATASHEET VIEW - DATES

<table>
<thead>
<tr>
<th>Reference</th>
<th>Original</th>
<th>Days</th>
<th>Planned</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>25/04/2023</td>
<td>1</td>
<td>25/04/2023</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>08/05/2023</td>
<td>2</td>
<td>08/05/2023</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>22/05/2023</td>
<td>14</td>
<td>22/05/2023</td>
<td>-</td>
</tr>
</tbody>
</table>

1. The First Column “Original” shows the original planned dates inserted by the PMU to which IFAD has provided a No Objection as part of the procurement plan process.

2. The second column “Days” shows the number of days that each activity step takes to complete.

3. The third column “Planned” shows the revised planned dates for each activity step. These are calculated based on the last actual date of the previous completed step. These will also update the dates of the activity subsequent steps not yet started are re-planned.

4. The fourth column “Actual” are the actual dates of completion of each step.
To start with the implementation select the Datasheet sub-tab to access the activity steps.

Click on Upload to start uploading the documents required under each activity step.

Click on browse files to browse the document you want to upload under the activity step in process.

Once you select the requested file, click on Upload file. Repeat the same process for all the documents required at the activity step you are implementing.

This is the symbol of a mandatory document. PMU must upload this document in order to proceed. The system will not allow you to proceed without uploading this document.
In case of multiple versions, the version numbering will increment automatically by the system (e.g. V1, V2, etc.).

To access the previous versions of the document, click on the drop-down menu of the version number and select the version you want to view.
Some of the activity step will require to insert date information. This is indicated through a calendar sign. To fill the dates required, click on the “Edit” button, select the date and click on “Save” to save your information.

This symbol indicates that the filling of date information is mandatory.

This symbol indicates that the filling of date information is optional.
To put a comment on any specific document, click on the dialog box button next to the drop-down menu.

Insert your comment in the text box.

Each comment has an audience who will be able to view this comment. If you select “Everyone” both IFAD and PMU teams will be able to view the comments. If “PMU” is selected, only PMU users will be able to see these comments.

Click on ‘Save” to save your comment and proceed.
“**In Process**” is the status of the activity step being under implementation. The black and white check mark 🔄 next to the activity step status indicates that this step requires a No Objection from IFAD.
REQUEST FOR IFAD NO OBJECTION

1. Once you have uploaded all the documents required for the activity step, you can request IFAD’s No Objection for this step by clicking on the “Request NO” button;

2. In the pop-up window insert a message for IFAD related to the No Objection request you are submitting. Click “Continue” to proceed.

3. The status of the activity will change from “In Process” to “NO Requested” and a message “Requested NO Successfully” will appear to the PMU user.
1. The PMU have the option to recall a No Objection Request already submitted to IFAD for an activity step. To do so, click on the “Recall NO” button;

2. In the pop-up window, you need to write in the comment box the reason why you recalled the No Objection Request (mandatory comment) and then click on “Continue” to proceed;

3. The system will display the confirmation and the status of the step will change to “PMU recalled the NO”.

THE RECALL FOR NO OBJECTION REQUEST NEEDS TO BE ACKNOWLEDGED BY IFAD IN ORDER FOR THE PMU TO PROCEED WITH THE STEP
Once the Recall NO has been acknowledged by IFAD, the PMU can now add a new version of the documents previously submitted to IFAD or can delete the old documents and replace them with new ones and resubmit the activity step to IFAD for No Objection based on the new documents.
AMENDING AN ACTIVITY STEP

Once IFAD issues the No Objection for the activity step, the PMU have the option to amend this step and revise the documents/information in the step to get a new No Objection from IFAD based on the revised documents/information.

1. This can be done by clicking on the “Amend” button.

2. In the pop-up window, you need to write in the comment box the reason why you are amending this activity step (mandatory comment) and then click on “Continue” to proceed;

3. The step status will change from “No Objection Issued” to “In Process” and a confirmation message “Prepared for amendment successfully” will be generated by the system.
GO BACK ONE STEP

1. The PMU have the option to go back to the previous activity step. This can be done by clicking on the “Go Back” button available in the current activity step.

2. In the pop-up window, you need to write in the comment box the reason why you want to go back to the previous step (mandatory comment) and then click on “Continue” to proceed;

3. The system will display the confirmation that the implementation was moved to previous step successfully and the previous step status will change from completed to “In Process”.

Moved to previous step successfully
RESTARTING THE IMPLEMENTATION

1. The PMU have the option to request the restart of the implementation. This can be done by clicking on the "Request Restart" button available in the current activity step.

2. In the pop-up window, you need to write in the comment box the reason why you want to restart the implementation process (mandatory comment) and then click on “Continue” to proceed;

3. The system will display the confirmation “Restart requested successfully” and the step status will change from “In Process” to “Restart Requested”. A request is now sent to IFAD to provide an approval for the restart request. Once IFAD approves the restart request, the activity implementation process will restart from the beginning at the first step which will now be the step in Process. In this case, the PMU will have the option to either restart the implementation from the beginning or make a cancel request for the entire procurement activity.
RESTARTING THE IMPLEMENTATION

There might be cases where for some activity steps that require No Objection from IFAD and where the PMU submitted this step to IFAD for No Objection, that IFAD rejects the No Objection request. In this case, the activity step status will be “NO rejected” and the only option the PMU will have is to either restart the implementation process from the beginning or request a cancellation of the entire procurement activity.
COMPLETING THE STEP

Once IFAD issues the No Objection for the activity step, the PMU will receive a notification to perform a new task:

1. Select the activity from the Tasks list;
2. The system will display the No Objection document received by IFAD in pdf format. You can access this document by clicking on it.
3. To complete an activity step, click on “Complete” button to proceed to the next one.
4. In the pop-up window, the system will automatically set the actual completion date for this step to be the same date on which the no-objection letter was issued for prior review activities. For post review ones, you will need to select the completion date from the calendar being the date on which you have completed the step. Also you have the option to add a comment once you complete the step.
In some of the activity steps it is required to upload documents and/or fill information in the bidders table. This can be noticed from the following icon: 

To go to the bidders table, you need to click on the “Goto Bids” button under the activity step in the datasheet tab. This will take you to the “Bids” tab in which you will be able to upload documents and fill information related to the bidders.

Once under the “Bids” tab, you will see an empty table under which you need to add bidders. To do so, click on “Add Bid” button.
The PMU can add bids to the bidders table by performing one of the following two options:

**Option 1:** Adding a bidder from an existing vendor list already created by the PMU. This can be done in the “Existing Vendor” tab that appears by default once the “Add bid” button is clicked by the PMU.

To add an existing vendor click on the “Add” button next to the vendor you want to add to the bidders list. Repeat the same process to add more bidders.
BIDDERS TABLE – ADDING VENDORS

**Option 2:** Creating a new bidder by clicking on the “New Vendor” tab and filling in the vendor information. Click on the “Save” button to save the newly created vendor in the existing vendor list. Then click on the “Add” button to add the vendor to the bidders table.

Once you have completed adding bidders to the bidders table, you can click on the datasheet tab to go back to the main implementation page to continue uploading the remaining documents of the activity step.
Once at the “Bids” tab during the implementation process, the PMU can perform the three following actions concerned with each of the added bidders in the bidders table:

- **Uploading documents** specific to each bidder in the bidders table by clicking on this button.
- **Adding comments** specific to each bidder in the bidders table by clicking on this button.
- **Deleting bidders** from the bidders table by clicking on this button.
Some of the activity steps requires that documents are uploaded for each specific bidder at the bidders table (i.e. Proof of RFP Invite document). To upload a document at the bidders table you need to click on the document symbol in the “bids” tab. This will open a pop up window in which the required document name will be displayed with the “Upload” button allowing you to upload the required document(s) in this window. You can also add a new version of the document uploaded or delete the document from the drop down menu. Also you can click on “Edit Properties” to add a note under the document title.
You can add comments specific to each bidders in the bidders table under the "Bids" tab by clicking on the comment dialog box symbol. Write your comment then click on the "Save" button to save it.
You can delete one or more specific bidders from the bidders table under the “Bids” tab by clicking on the delete symbol 🗑. Once you click on the delete symbol, the system will ask you to confirm your choice; click on “OK” to remove the selected bidder from the table.
As might be required at each activity step, the PMU needs to fill fields in the bidders table under the “Bids” tab. The fields can be either drop down menus with “Yes/No” information or prices to be filled with currencies as shown in the below screenshot:
In case a bid did not pass a specific activity step, the system will automatically detect that the bid is rejected and will highlight this bid in pink colour as per below screenshot, while other bids that still in process will have the status “pending” until these are either awarded or rejected.
Once a bid is awarded to a specific bidder, the status of this bidder will automatically be set by the system as “Awarded” and the other bidders will be “Rejected”.

<table>
<thead>
<tr>
<th>Status</th>
<th>EOI Submitted</th>
<th>Pre qual.</th>
<th>Invited</th>
<th>Submitted</th>
<th>Read out price</th>
<th>Eval. price</th>
<th>Rec. award</th>
<th>Awarded</th>
<th>Contract price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Ltd. - Budapest - Angola</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>60,000.00 USD</td>
<td>60,000.00 USD</td>
<td>Yes</td>
<td>Yes</td>
<td>(2)</td>
</tr>
<tr>
<td>Rikolto - Brussels - Belgium</td>
<td>Rejected</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(0)</td>
</tr>
<tr>
<td>Olser - Jaira - Angola</td>
<td>Rejected</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>65,000.00 USD</td>
<td>67,000.00 USD</td>
<td>No</td>
<td></td>
<td>(1)</td>
</tr>
<tr>
<td>Kookaburra Inc. - Adelaide - Australia</td>
<td>Rejected</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>75,000.00 USD</td>
<td>75,000.00 USD</td>
<td>No</td>
<td></td>
<td>(1)</td>
</tr>
</tbody>
</table>

Save
During the implementation process, you can at any moment re-plan the dates of the activity current and subsequent step(s) that are not yet implemented. This can be done by clicking on the “Replan” tab which includes the roadmap of the entire activity. You will notice in this tab that the activity steps already completed have their dates fields locked because these are completed.

As for the current and subsequent activity step dates, the fields can be modified according to the PMU implementation schedule. You can increment the number of days or change the dates of any current or subsequent step as needed and the system will automatically re-plan the subsequent steps dates according to the changes made.
Once you have completed the implementation of all the activity steps and that you have reached the last activity step and clicked on “Complete” button, the activity step status will change from “Implementing” to “Completed” and the system will generate a message “Completed successfully” and the colour of the activity will change from blue to black.
In case you are implementing an activity with multiple lots, when you start the implementation of this activity you will see a menu in the implementation tab allowing you to select which lot you want to implement. This menu appears in both the Datasheet sub-tab and the Bids sub-tab.
In the datasheet sub-tab, by default, the lots are merged and have one implementation workflow without the need to switch between the multiple lots in this tab until reaching the evaluation stage. At the evaluation stage, you have the option to separate the lots implementation workflow to proceed separately for each lot by clicking on the “Complete and Fork” button. Once you click on this button you cannot go back to merge the lots again. The lots will stay separated until the completion of the activity implementation.
IMPLEMENTATION OF AN ACTIVITY WITH MULTIPLE LOTS

In the “Bids” tab at the bidders table, the lots are always separated and you will need to switch between the lots from the menu to add bidders, fill the required information and attach the required documents specific to each bidder for each lot separately until the completion of the activity implementation.