IFAD OPEN – Project Procurement End-to-End System

GRANTS ACTIVITY IMPLEMENTATION

USER TYPE: PMU
WHAT DOES THIS QUICK CARD COVER?

Grants 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
- Beneficiaries Table
- Beneficiaries Tab
- Replanning Dates of Activity Steps
- Completing Activity Implementation
To start the implementation of an activity, you need to click on the code of the approved activity → then click on the “Dates” tab
START ACTIVITY IMPLEMENTATION

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.
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.

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

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 of the dates of the activity subsequent steps not yet started are re-planned.

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.
DATE INFORMATION

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.
**ADDING COMMENTS**

**Pre-Qualification**

Submission of Pre-Qualification docs **In process**

1. To put a comment on any specific document, click on the dialog box button next to the drop-down menu.

2. Insert your comment in the text box.

3. 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.

4. 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.
RECALL NO OBJECTION

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.
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”.
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 beneficiaries table. This can be noticed from the following icon: 👥+

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

Once under the “Beneficiaries” tab, you will see an empty table under which you need to add beneficiaries. To do so, click on “Add Beneficiary” button.
The PMU can add beneficiaries to the beneficiaries table by clicking on “Add Beneficiary” button in the “Beneficiaries” tab. Once this button is clicked, a pop up window will appear on the screen requesting you to fill the required information of the beneficiary you want to add. Fill in the information and click on the “Save” button to complete the registration of the beneficiary in the system. Repeat this process to add more beneficiaries to the beneficiaries table. Once done, you can fill the information required in the table, click on save to save your data and then click back on the “Datasheet” tab to go back to the main activity steps implementation page.
Once at the “Beneficiaries” tab during the implementation process, the PMU can perform the three following actions concerned with each of the added beneficiaries in the beneficiaries table:

- **Uploading documents** specific to each beneficiary in the beneficiaries table by clicking on this button.
- **Adding comments** specific to each beneficiary in the beneficiaries table by clicking on this button.
- **Deleting beneficiaries** from the beneficiaries table by clicking on this button.
Some of the activity steps require that documents are uploaded for each specific beneficiary at the beneficiaries table (i.e. Proof of Invite document). To upload a document at the beneficiaries table you need to click on the document symbol in the “beneficiaries” 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 beneficiary in the beneficiaries table under the “Beneficiaries” tab by clicking on the comment dialog box symbol. Write your comment then click on the “Save” button to save it.
You can add delete one or more specific beneficiaries from the beneficiaries table under the “Beneficiaries” 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 beneficiary from the table.
As might be required at each activity step, the PMU needs to fill fields in the beneficiaries table under the “Beneficiaries” 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 beneficiary did not pass a specific activity step, the system will automatically detect that the beneficiary is rejected and will highlight this beneficiary in pink colour as per below screenshot, while other beneficiaries that still in process will have the status “pending” until these are either awarded or rejected.
Once a Grant is awarded to a specific beneficiary, the status of this beneficiary will automatically be set by the system as “Awarded” and the other beneficiaries will be “Rejected”.

<table>
<thead>
<tr>
<th>Status</th>
<th>EOI Submitted</th>
<th>Pre qual.</th>
<th>Invited</th>
<th>Submitted</th>
<th>Amount</th>
<th>Eval. amount</th>
<th>Recce. award</th>
<th>Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>BENEFICIARY ALFA - Rome - Italy</td>
<td>Awarded</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>130,000.00 USD</td>
<td>130,000.00 USD</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>BENEFICIARY DELTA - Lyon - France</td>
<td>Rejected</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>140,000.00 USD</td>
<td>142,000.00 USD</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>BENEFICIARY BETA - Vienna - Austria</td>
<td>Rejected</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>145,000.00 USD</td>
<td>145,000.00 USD</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>BENEFICIARY GAMMA - Manchester - United Kingdom</td>
<td>Rejected</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
REPLANNING DATES OF ACTIVITY STEPS DURING IMPLEMENTATION

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.