OPEN – Procurement End-to-End System

CREATING, EDITING AND DELETING ACTIVITIES ON THE PROCUREMENT PLAN, LINKING ACTIVITIES AND PLANNING TIMELINES

USER TYPE: Procurement officer/assistant
(Other user profiles will only have viewing rights)
WHAT DOES THIS QUICK CARD COVER?

- **Adding** an activity to the procurement plan
- **Editing** an activity on the procurement plan
- **Deleting** an activity from the procurement plan
- **Planning timelines** of activities
- **Linking** procurement activities
- **Unlinking** procurement activities
1. Click the title of the procurement plan. For example “Rural Adelante (EASTERN) – (1100001736)”

2. Click "New Activity"
1) Click this dropdown menu to select the procurement category. In this example, we will select “Works”.

2) Click the “Title” field and type the title of your procurement activity. For example “Construction of Irrigation Canals”.

3) Click this dropdown menu to select the currency. In this example we will choose USD.

4) Click the “Estimated Amount” field and type the amount of your procurement activity. For example “1,000,000”.

5) Click the “Description” field and type the description of your procurement activity. For example “Construction of Irrigation Canals in the Eastern province”.

6) Click this dropdown menu to select the procurement method. In this case we will choose ICB.

7) Click this dropdown to select the Contractual Arrangement. For example “Contractor”.

8) Click the “Non-consulting” field to indicate activities that are Non consulting services. It complements the procurement category chosen. Otherwise leave this field unticked.

9) Type here your AWPB Ref. Number

10) Click the “Domestic preference” field to indicate activities where Domestic Preference applies. Otherwise, leave this field unticked.

11) Click the “Pre-Qualification” or “Post-Qualification” field depending on which of these options the activity foresees.

12) Click the radio buttons to indicate whether the procurement activity follows a single-envelope or dual-envelope approach.

13) Under Source of Financing enter the percentage of the estimated amount financed by each source of financing. In this example, we will put 50% IFAD loan and 50% National government.

14) Under the "Tags" field you can insert specific tags, for example, linked to a specific implementing partner. Such tags can later be used as filters when searching for activities in the Procurement Plan.

15) Click the “Project Area” field and insert the relevant information. For this example, we will insert the area in which the works will take place, i.e. the “Eastern province”.

16) Under the “Location” field, you can add further information about the activity location, including the longitude and latitude.

17) Click the “Add Lot” button to add lots in case the activity has more than one lot.

Once you have filled in all the necessary information, click on the “Save draft” button at the bottom of the page.

Please note that the list of Procurement Methods available will be automatically generated by the system based on the Procurement Category previously selected and the Estimated Contract Amount inserted.
1. When Clicking on “Add Lot” button to add lots to an activity having multiple lots, the Main Activity Title, Main Activity Description, Activity Estimated Amount, AWPB Reference Number and Sources of Financing will be copied automatically by the system to the first lot corresponding fields.

2. Modify the description of the first lot to correspond to your needs and click on “Add Lot” to add a second lot. You can also click on “Remove Lot” to delete the lot from the activity.

3. In case you need to include a lot number, this shall be reflected and included in the Lot Title.

4. The same concept of adding lots applies to both Works and Goods activities.
1) Click this dropdown menu to select the procurement category. In this example, we will select “Goods”.

2) Click the “Title” field and type the title of your procurement activity. For example “Buying agricultural machinery”.

3) Click this dropdown menu to select the currency. In this example we will choose USD.

4) Click the “Estimated Amount” field and type the amount of your procurement activity. For example “300,000”.

5) Click the “Description” field and type the description of your procurement activity. For example “Buying agricultural machinery for the project”.

6) Click this dropdown menu to select the procurement method. In this case we will choose NCB.

7) Click this dropdown to select the Contractual Arrangement. For example “Supplier Contract”.

8) Click the “Non-consulting” field to indicate activities that are Non consulting services. It complements the procurement category chosen. Otherwise leave this field unticked.

9) Type here your AWPB Ref. Number

10) This field is used to provide a sufficiently detailed justification for NCB and whenever you are selecting a procurement method that does not fit the applicable thresholds. For additional information, kindly refer to Modules F1 and F2 of the IFAD Procurement Handbook.

11) Click the “Pre-Qualification” or “Post-Qualification” field depending on which of these options the activity foresees.

12) Click the radio buttons to indicate whether the procurement activity follows a single-envelope or dual-envelope approach.

13) Under Source of Financing enter the percentage of the estimated amount financed by each source of financing. In this example, we will put 50% IFAD loan and 50% National government.

14) Under the “Tags” field you can insert specific tags, for example, linked to a specific implementing partner. Such tags can later be used as filters when searching for activities in the Procurement Plan.

15) Click the “Project Area” field and insert the area in which the goods will be delivered, for example “Eastern province”.

16) Click the “Add Lot” button to add lots in case the activity has more than one lot.

Once you have filled in all the necessary information, click on the “Save draft” button at the bottom of the page.
ADDING A CONSULTING SERVICES ACTIVITY TO THE PROCUREMENT PLAN

1) Click this dropdown menu to select the **procurement category**. In this example, we will select “Consulting services”.

2) Click the **Title** field and type the title of your procurement activity. For example “Baseline and Impact Assessment study”.

3) Click this dropdown menu to select the **currency**. In this example we will choose USD.

4) Click the **Estimated Amount** field and type the amount of your procurement activity. For example “80,000”.

5) Click the **Description** field and type the description of your procurement activity. For example “Baseline and Impact Assessment study of the new Irrigation System”.

6) Click this dropdown menu to select the **procurement method**. In this case we will choose QCBS.

7) Click this dropdown to select the **Contractual Arrangement**. For example “Consulting firm”.

8) Click the **Non-consulting** field to indicate activities that are Non consulting services. It complements the procurement category chosen. Otherwise leave this field unticked.

9) Type here your **AWPB Ref. Number**

10) Click the **No shortlist** or **Shortlist** field depending on which of these options the activity foresees.

11) Under **Source of Financing** enter the percentage of the estimated amount financed by each source of financing. In this example, we will put 100% IFAD loan.

12) Under the **Tags** field you can insert specific tags, for example, linked to a specific implementing partner. Such tags can later be used as filters when searching for activities in the Procurement Plan.

13) Click the **Project Area** field and insert the relevant information. For this example, we will insert the area, in which the project component is being implemented, for example “Eastern province”.

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Please note that the list of Procurement Methods available will be automatically generated by the system based on the Procurement Category previously selected and the Estimated Contract Amount inserted.

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Once you have filled in all the necessary information, click on the "Save draft" button at the bottom of the page.
1) Click this dropdown menu to select the procurement category. In this example, we will select "Consulting services".

2) Click the "Title" field and type the title of your procurement activity. For example "Technical Support M&E".

3) Click this dropdown menu to select the currency. In this example we will choose USD.

4) Click the "Estimated Amount" field and type the amount of your procurement activity. For example "30,000".

5) Click the "Description" field and type the description of your procurement activity. For example "Technical support for the monitoring and evaluation of the Program".

6) Click this dropdown menu to select the procurement method. In this case we will choose SSS/IC.

7) Click this dropdown to select the Contractual Arrangement. For example "Individual Consultant".

8) Click the "Non-consulting" field to indicate activities that are Non consulting services. It complements the procurement category chosen.* Otherwise leave this field unticked.

9) Type here your AWPB Ref. Number

10) Since we selected SSS/IC, the Period field is displayed; this is because the contract duration cannot exceed 12 weeks. Indicate here a contract duration lower than 12 weeks, for example 6.

11) This field is used to provide a sufficiently detailed justification for Direct Contracting (DC) and Single Source Selection (SSS) and whenever you are selecting a procurement method that does not fit the applicable thresholds. For additional information, kindly refer to Modules F1 and F2 of the IFAD Procurement Handbook.

12) Click the “No shortlist” or “Shortlist” field depending on which of these options the activity foresees. Here, since we selected the SSS/IC method, the Shortlist option is not available.

13) Under Source of Financing enter the percentage of the estimated amount financed by each source of financing. In this example, we will put 50% IFAD loan, 50% Beneficiaries.

14) Under the "Tags" field you can insert specific tags, for example, linked to a specific implementing partner. Such tags can later be used as filters when searching for activities in the Procurement Plan.

15) Click the "Project Area" field and insert the relevant information. For example, we will insert the area in which the project component is being implemented, for example "Eastern province".

Once you have filled in all the necessary information, click on the "Save draft" button at the bottom of the page.

Please note that the list of Procurement Methods available will be automatically generated by the system based on the Procurement Category previously selected and the Estimated Contract Amount inserted.
1) Click this dropdown menu to select the procurement category. In this example, we will select “Grants”.

2) Click the “Title” field and type the title of your procurement activity. For example “Farming Grant”.

3) Click this dropdown menu to select the currency. In this example we will choose USD.

4) Click the “Estimated Amount” field and type the amount of your procurement activity. For example “500,000”.

5) Click the “Description” field and type the description of your procurement activity. For example “Agricultural transformation towards achieving Zero hunger”.

6) Click this dropdown menu to select the procurement method. In this case we will choose Grant Award.

7) Click this dropdown to select the Contractual Arrangement. For example “Cash Grants”.

8) Type here your AWPB Ref. Number

9) Click the radio buttons to indicate which of these options the activity foresees. In this case, we will select Competitive.

10) Click the “No shortlist” or “Shortlist” field depending on which of these options the activity foresees. Here, since we will select Shortlist.

11) Under Source of Financing enter the percentage of the estimated amount financed by each source of financing. In this example, we will put 50% IFAD loan, 50% IFAD ASAP.

12) Under the “Tags” field you can insert specific tags, for example, linked to a specific implementing partner. Such tags can later be used as filters when searching for activities in the Procurement Plan.

13) Click the “Project Area” field and insert the relevant information. For this example, we will insert the area, in which the Grant is being implemented, for example “Eastern Province”.

Once you have filled in all the necessary information, click on the "Save draft” button at the bottom of the page.

Please note that the list of Procurement Methods available will be automatically generated by the system based on the Procurement Category previously selected and the Estimated Contract Amount inserted.
After you click "Save draft", you will be able to see the summary of the procurement activity details you have entered.
EDITING AN ACTIVITY ON THE PROCUREMENT PLAN

1. If you wish to edit some information you have entered, click on the "Edit" button.

2. You will be redirected to the editing page where you can modify the activity data and then click "Save draft" once again to save your changes.
Once you have entered all the necessary information and double-checked they are correct, you can start planning the timeline of your procurement activity by clicking on the "Dates" tab.
PLANNING TIMELINES OF ACTIVITIES

Until the dates tab is filled a warning sign (i) will be displayed under the issues tab. This is to indicate the need to create an activity roadmap i.e. setting the dates.
PLANNING TIMELINES OF ACTIVITIES
for standalone activities (for linked activities see slide 14)

1. Click on the "Plan Strategy" dropdown menu to select whether you want to start planning from the start date or end date. In this example, we will plan from the start date.

2. On the "Start date field" select the date in which your procurement activity is expected to start.

3. Under the "Plan from" field, select the stage from which you want the timeline to start. In this case, we will select "EOI Shortlist Procedure".

4. Click the "Continue" button to display the draft timeline.
PLANNING TIMELINES OF ACTIVITIES

After you click “Continue”, you will be able to preview the timeline of your procurement activity.

When clicking on “Show Estimated Timelines” you can view the estimated timeline references.

The timeline is automatically generated using working days, except for the steps in which you see the red dot, which indicates said step is based on calendar days.
You can modify the duration of any step by clicking on the "Edit" button at the bottom of the timeline page.
Then increase or decrease the number of days of the step you wish to modify and type the enter button on your keyboard.

For example, you can change the period of Submission of Bid Documents + No Objection from 8 to 10 days.

Once you have finished reviewing your timeline, click the "Save" button at the bottom of the page.

Once you change the duration of a single step, the dates of the following steps will automatically change accordingly!
Once a procurement activity has successfully been added and planned, when clicking on the Procurement plan you will be able to see it in the list.

When clicking on the name of the activity you will be able to view its information.

You will be able to edit or delete the activity as necessary.
You can filter activities by procurement category, method, etc. by ticking/selecting the desired category on the left side of the plan.

Procurement Plans can also be filtered by year. This is where you will be able to validate and submit it for clearance.
LINKING PROCUREMENT ACTIVITIES

If your activity is to be linked to another procurement activity, once you are under the "Dates" tab (see pages 8-9), click on other actions drop down menu and click on the "Link to other activity" option.

This way, the timeline of the activity we are creating will be tied to a step in the timeline of the other activity we are linking it to.
1. Click the dropdown menu of the list of activities already present in your procurement plan, then select the activity you want to link it to.

2. In case you are linking this activity to another one with lots, pick the lot no desired.

3. Select at which step you want it linked. In our example, we will link it to the contract signature date.

4. Click the "Buffer days" field, and indicate how many days after the contract completion date of the Construction of Irrigation Canals you want the other activity to start.

Click the Continue button to view your timeline which will be now linked to the timeline of the selected procurement activity.
LINKING PROCUREMENT ACTIVITIES

1. To unlink an activity to another, you can click on the other action drop down menu on the timeline page (dates tab)

2. Then click the "Unlink" button.

3. The system will ask you to confirm once again you wish to unlink the activities in a pop-up message.