IFAD OPEN – Project Procurement End-to-End System

MANAGING ACTIVITIES IN A PROCUREMENT PLAN AND PLANNING TIMELINES / SUBMISSION OF PLAN TO IFAD FOR NO OBJECTION

USER TYPE: Project Management Unit (PMU)

(Other user profiles will only have viewing rights)
WHAT DOES THIS QUICK CARD COVER?

- Adding an activity in a procurement plan
- Uploading documents to an activity
- Planning timelines for standalone activities
- Planning timelines for linked activities
- Re-planning timelines of activity
- Deleting set activity
- Submitting the procurement plan for IFAD no-objection
- Adding comments to a procurement plan
- Amending an Approved Activity
- Cancelling an Activity
- Cancelling a Lot within an Approved Activity
- Color Coding of Activities – Activities Statuses
1. After you have logged in IFAD OPEN as a procurement specialist, choose a plan and click on it.

2. Click on “New Activity”
ADDIN G AN ACTIVITY TO THE PROCUREMENT PLAN

1. Click this dropdown menu to select the procurement category. In this example, we will select “Goods”.

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

3. Click the “Estimated Amount” field and type the amount of your procurement activity. For example “350,000.00”.

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

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

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

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

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

Use of procurement methods are guided by the thresholds thus in certain cases some procurement methods are available by justification, like NCB would be in this example. In this case you have to click on the “Justification” field and type the reasons why you are using a less competitive procurement method.
1. Click the "Title" field and type the title of your procurement activity. For example "Procurement of pick up trucks".

2. Click the "Description" field and type the description of your procurement activity.

3. Type here your AWBP Ref. Number - a specific reference number the project has to insert to the budget of that specific financial year.

4. Click the "Non-consulting" field to indicate activities that are Non-consulting services. Otherwise leave this field unticked.

5. Under the "Tags" field you can insert specific tags that will later be used as filters when searching for activities in the Procurement Plan.

6. 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. "PMU offices".

7. 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.

8. Once you have filled in all the necessary information, click on the "Save" button.
To create an activity with multiple lots, you can follow the below steps:

1. Select the procurement category
2. Type in the activity main title and main description.
3. Type in the amount of the first lot in the Estimated Amount field and select your currency.
4. Select the contractual arrangement, qualification and envelope types
5. Type in the AWPB Ref. Number, tags, project area
6. Insert the sources of financing
7. Click on add lot to add a lot the activity and this will copy the estimated amount, activity title, activity description, AWPB Ref. No. and sources of financing the be the same information in the fields of the first lot.
ADDING AN ACTIVITY WITH LOTS

Fill in the specific Lot title, lot description, sources of financing, AWPB Ref. No specific to each lot. You can click on “Remove Lot” button to remove the lot created or click on “Add Lot” to add a new lot.

The initial estimated amount field will now be locked and calculated automatically by the system as the total sum of all lots amounts.
After you click "Save", you will be able to see the summary of the procurement activity details you have entered.
When you create an activity that requires a justification, you can upload supporting documents related to this justification. After including all the activity details, click on “Save” to save the activity. Then click on the “Upload” button in the “Details” tab at the justification section to upload the justification documents.

From the “More” menu next to each document, you can choose to preview, delete, add a new version, or edit properties of this document. Once done, click on “Save” to save the activity details and documents. The justification documents will be accessible in the activity “Details” tab at the justification section.
When you create an activity in a procurement plan, you have the option to upload documents specific to this activity. This can be done by clicking on the activity code, then clicking on the “Documents” tab. At the documents tab, click on the “Upload” button to upload the documents specific to the activity.

Browse your computer for the files you want to upload, then click on the “Upload files” button to upload the documents. Once the documents are uploaded you can click on the “More” menu to upload a new version or click on “Edit Properties” to add a note to the document, or click on “Delete” to delete the document uploaded.
PLANNING TIMELINES FOR **STANDALONE ACTIVITIES**

1. Click on “Issues”. The warning sign tells you that your activity has not been planned yet.

2. Click on “Create Roadmap” to create a roadmap for this activity.

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1. If you want an activity with its own planned timeline that does not depend from any other activity, select “Standalone activity”.

2. Select either “End date” or “Start date” depending on whether you want to plan your activity from contract completion date or from start date.

3. Choose your “End date” on the calendar.

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4. When you are done, click on “continue”
1. If you want to link your procurement activity to another activity select “Linked activity”

2. Choose an activity on “Activity to be Linked to”

3. Choose a “Lot” you wish to link your activity to

4. To choose at which step will your activity be able to start select one of the “At Step” options. If you select Contract Signature, for example, your activity will start only once the previous activity you are linking it to has reached contract signature stage.

5. On “Buffer days” choose how many days after the contract signature stage, for example, should your new activity start.

6. When you are done, click on “continue”
The activity has been successfully planned.

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<table>
<thead>
<tr>
<th>Activity Start Date</th>
<th>Days</th>
<th>Planned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bidding Process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submission of Bid Documents</td>
<td>10</td>
<td>06/12/2022</td>
</tr>
<tr>
<td>+ No-Objection</td>
<td>+7</td>
<td></td>
</tr>
<tr>
<td>Bid Invitation</td>
<td>2</td>
<td>16/12/2022</td>
</tr>
<tr>
<td>Bid Submission Deadline &amp; Opening</td>
<td>30</td>
<td>18/01/2023</td>
</tr>
<tr>
<td>Bid Evaluation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submission of Evaluation Report</td>
<td>10</td>
<td>01/02/2023</td>
</tr>
<tr>
<td>0 No-Objection</td>
<td>+7</td>
<td></td>
</tr>
<tr>
<td>Contract Award &amp; Signature</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notice of Intent to Award &amp; Standstill Period</td>
<td>3</td>
<td>15/02/2023</td>
</tr>
<tr>
<td>Contract Award</td>
<td>11</td>
<td>02/03/2023</td>
</tr>
<tr>
<td>Submission of Draft Contract &amp; Min. of Discussions</td>
<td>5</td>
<td>08/02/2023</td>
</tr>
<tr>
<td>0 No-Objection</td>
<td>+7</td>
<td></td>
</tr>
<tr>
<td>Contract Signature</td>
<td>4</td>
<td>24/03/2023</td>
</tr>
</tbody>
</table>
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Note that the **Days** you see are all **working days** except the ones in the steps with an icon 🕒 - this step uses calendar days instead.
1. Click on “Show Estimated Timelines” to view the minimum days standards average and the maximum number of days for each activity process. This estimated timeline was created by IFAD based on previous experience with other projects.

2. Click on “Edit” to make changes to the Planned timetable. Note that you cannot go below the minimum number of days but all changes above are allowed.

3. When you are done, click on “Save” and the activity will be successfully updated.
1. If you want to delete the activity from the procurement plan you can do so by going back to “Details”.
2. Click on “Other actions” and select “Delete”.
1. Click on the hyperlink.

2. Click on “Ongoing” and select the financial year that has an icon next to it. The icon tells you that there are actions that still need to be taken on a specific procurement plan.

3. Click on “Validate” to validate the plan before submission.

4. Once the plan is validated, click on “Submit for Clearance” to submit the plan to the Project Director.

The Procurement Plan has been validated and has been submitted for clearance to the Project Director.

On the Project Director account the new activity will now be visible. The PD will review the plan, possibly requesting for changes and/or more information. Once the Project Director is satisfied with the activity he will submit it for No-Objection to the Country Director.
When a procurement specialist submits the procurement plan to the project director, the activity status will change from “Draft” to “Submitted for Clearance” and the procurement plan status will change from “Pending” to “Waiting for PD Clearance”.

When a procurement project director submits the procurement plan to IFAD for No Objection the activity status will change from “Submitted for Clearance” to “Submitted for Approval” and the procurement plan status will change from “Waiting for PD Clearance” to “IFAD Reviewing”.

When IFAD approves the procurement plan, the activity status change from “Submitted for approval” to “Approved” and the status of the procurement plan changes from “IFAD reviewing” to “Approved”.

Once the procurement plan is given a No Objection by IFAD, the PMU will receive a notification in the notification tab informing it that the No Objection was issued.
ADDING COMMENTS TO A PROCUREMENT PLAN

During the submission of the procurement plan for No Objection from IFAD, the project users can add comments specific to their activities and exchange these comments between the different PMU users internally (i.e. between Project director and procurement specialist). The audience selection “PMU” is available to keep the comments visible to the project users while if “everyone” is selected, the comments will appear to both PMU and IFAD users. Also “Prepare Forward” option is available for the PMU users; when clicked this will open to the project users a dialog space internal to them without having this internal conversation appearing in the comments area. When the exchange occurs, each side can edit the comment of the other side internally until the comment is finalized.

By clicking on this arrow, you can open an internal conversation between the procurement specialist and project director.

Click on “Edit” to edit the comments in the internal conversation.
AMENDING AN APPROVED ACTIVITY

You have the option to amend your activities after these are given a No Objection by IFAD. To do so, click on the code of the approved activity you want to amend.

At the activity page you will be able to perform the following:
1. Change the currency and amount of the activity
2. Change the contractual arrangement
3. Change “Domestic Preference” application
4. Change activity description
6. Requesting the Cancellation of an activity
7. Change the tags
8. Change Project Area
9. Change the Sources of Financing

Click on the “Edit” button that will take you to the activity details editable page.

Once you are done, click on “Save” to save your activity changes.
CANCELLING AN APPROVED ACTIVITY

Click on the code of the approved activity you want to cancel.

Click on the “Edit” button that will take you to the activity details editable page.

Tick the “Request cancellation of the activity” box if you want to cancel the activity.

The activity status will then change from “Approved” to “Amended” and the message “This activity has a cancel request” will appear on the activity details page.

A message will be generated by the system asking you to confirm your choice for the cancellation of the activity at the bottom of the activity page. Check the box to confirm your choice and click on Save to Continue.
Once you request to cancel an activity, you will need to submit this activity to IFAD for NO Objection for the cancellation to take effect.

Click on the procurement plan in question from the procurement plan menu and then click “submit for clearance” button to submit the activity to the project director.

The project director will then submit the procurement plan to IFAD for No Objection and once IFAD provides a No Objection to the plan, the status of the activity will change from “Amended” to “Cancelled”. 
Click on the code of the approved activity you want to cancel the lot from.

Tick the “Request cancellation of the lot” box of the lot(s) you want to cancel

The activity status will then change from “Approved” to “Amended” and the message “This activity has a cancel request on 1 lot” will appear on the activity details page.

A message will be generated by the system asking you to confirm your choice for the cancellation of the lot(s) at the bottom of the activity page. Check the box to confirm your choice and click on Save to Continue.
CANCELLING A LOT WITHIN AN APPROVED ACTIVITY

Once you request to cancel an activity lot, you will need to submit this activity to IFAD for NO Objection for the cancellation to take effect.

Click on the procurement plan in question from the procurement plan menu and then click “submit for clearance” button to submit the activity to the project director.

The project director will then submit the procurement plan to IFAD for No Objection and once IFAD provides a No Objection to the plan, the lot will be cancelled and this can be seen by going to the activity in question and selecting the details tab where the cancelled lot will be highlighted in red color.
The following are the different activity statuses in IFAD OPEN system with their corresponding color coding:
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- **MAR-2000001403-B-0006-G-ICB**
  - Fourniture d'imprimantes et d'ordina
  - Start: 15/06/2021 - End: 03/11/2021
  - 23,300.00 EUR / 254,225.00 MAD
  - Amended, Goods, ICB, 1 lot, Pre-Qual

- **MAR-2000001403-B-0006-G-ICB**
  - Fourniture d'imprimantes et d'ordina
  - Start: 15/06/2021 - End: 03/11/2021
  - 23,300.00 EUR / 254,225.00 MAD
  - Resubmitted for clearance, Goods, ICB

- **MAR-2000001403-B-0004-G-ICB**
  - Supply of Seeds
  - Start: 01/06/2022 - End: 08/12/2022
  - 51,260.00 EUR / 559,295.00 MAD
  - Cancelled, Goods, ICB, 1 lot, Pre-Qual

- **MAR-2000001403-B-0001-G-ICB**
  - Supply of Laptops and Printers
  - Start: 07/03/2023 - End: 13/09/2023
  - 51,260.00 EUR / 559,295.00 MAD
  - Resubmitted for approval, Goods, ICB, 2 lots
The following are the different activity statuses in IFAD OPEN system:

1. **Draft**: The activity is created by the PMU and is still at the procurement specialist (Not yet submitted to project director). Also when an activity is returned from the project director to the procurement specialist it will have the same status.

2. **Submitted for Clearance**: The activity is submitted by the procurement specialist to the project director for clearance (Activity is at project director side, not yet submitted to IFAD). Also when an activity is returned by IFAD to the project director, it will have the same status.

3. **Submitted for Approval**: The activity is submitted by the project director to IFAD (Activity is at IFAD side).

4. **Approved**: The activity is approved by IFAD (Activity is ready for implementation but the implementation did not start yet).

5. **Implementing**: The activity is being implemented by the PMU and the implementation process is ongoing.

6. **Completed**: The activity implementation is completed.

7. **Amended**: When an approved activity is modified, the status of the activity will change from “Approved” to “Amended” and this activity will require a No Objection from IFAD.

8. **Resubmitted for Clearance**: An amended activity is resubmitted by the procurement specialist to the project director (Activity is at project director side, not yet resubmitted to IFAD).

9. **Resubmitted for Approval**: An amended activity is resubmitted the project director to IFAD (Activity is at IFAD side).

10. **Cancelled**: An activity is cancelled when the PMU requests the cancellation of this activity and when IFAD issues a no objection for this cancel request.