IFAD OPEN – Project Procurement End-to-End System

CONSULTING SERVICES - IMPLEMENTATION

USER TYPE: PMU
WHAT DOES THIS QUICK CARD COVER?

Activity implementation:
• Start of the implementation;
• Datasheet view;
• Upload a Document;
• Adding a comment;

Project Management Unit Guide
• Proposal process;
• Evaluation;
• Contract Award and Signature.
ACTIVITY IMPLEMENTATION

1. In the procurement plan, click on the activity code of the activity you want to start implementing

2. In the page of the activity, go to the “Dates” tab
3. Click on the button “Start implementation” and click “Ok” in the pop-up window that will open to confirm your choice. The activity status will now change to Implementing and the message “Implementation workflow started” will appear.
This sheet shows all the steps that need to be performed for the activity to be completed. The steps are marked in green when they are completed, in orange when they are in process and in grey when they are still not 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 completed.

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 of 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.
At the first step of a consulting services activity for example “Submission of RFP”, the “Draft Request for Proposal Document” is the required document to be uploaded to complete this step. Click on the “+ Upload” button to start uploading this document.
This is the symbol of an optional document. PMU can upload this document if available and proceed. If not available the system will allow you to proceed as this document is not mandatory.

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.
When you upload a document, you will have the possibility to:

1. Preview the document in the displayer;
2. Edit the properties and add a note under document name;
3. Add a new version of the same document;
4. Delete the document.
Adding a Comment

Once you start the implementation process, you have the option to add comments to the activity. You can also add comments to each document you upload.

To add a general comment that refers to the overall activity, click on the comment bubble on the top left of the screen. This will open a comment box on the right hand of the screen where you can input your comment.

You may also add a comment specific to each activity step document. 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.
PMU User: Activity Implementation

The following slides are designed to guide the PMU in the implementation of the activity.
This step includes the first part of the process and is divided in:

1. Submission of RFP;
2. RFP Launch;
3. Proposal Submission Deadline & Opening;

In the following pages, we are going to show how each different step works.
To proceed with the Submission of RFP, you need to upload the Draft request for proposal document (see page 7).

Once you have uploaded your document you may click the button “Request NO” and request No Objection from IFAD to proceed with this step for prior review activities. For post review activities, a “Complete” button is available to complete the activity step.

In the pop-up window insert a message that IFAD will view with the request for No Objection.
It will be now displayed that the NO has been requested successfully.
In case you have already requested a NO but you wish to apply further modification, you may recall the No Objection Request you already submitted to IFAD.

Click on the button Recall NO and in the pop-up window write your message for IFAD on the reason why you are recalling the NO, then click on continue to proceed.
Once the “Recall NO” button is clicked by the PMU, the system will display a message that “NO recalled successfully”. The activity step status will change from “No Objection Requested” to “PMU recalled the NO”.

At this stage, the PMU will not be able to proceed until IFAD has acknowledged the request to recall the No Objection.
AMEND AN ACTIVITY STEP

In the instances you need to make an amendment to a specific activity step that has already received IFAD No Objection, you may request to amend the step by clicking on “Amend”.

It is required to write a message providing IFAD with the reasons why and what you want to amend. Click on “Continue” to proceed.
Once you click on “Amend” button, the activity step status will change from “No Objection Issued” to “In Process” and you will now be able to upload a new file or modify the previous one and then send it back again to IFAD, by requesting NO again for prior review activities.
Once you click on “Request Restart” button, you will be able to request the restart of the overall implementation process of the activity from IFAD. This can be done at any activity step during the implementation process.

You will need to include the reason for the restart by typing a message in the pop up window and clicking on “Continue” to send the request to IFAD.

The activity status will change from “In Process” to “Restart Requested”
Once the restart request is approved by IFAD, the activity implementation process will restart taking you back to the first activity step. Also, the No Objection document for restart will be available to download.

At this stage, you can either choose to restart implementation from the first step and continue the implementation or go back to your procurement plan to cancel the activity in case you don’t want to proceed with it.
If you wish to complete the activity step after receiving a No Objection from IFAD in case of prior review activities, you might click on Complete; for post review activities, you can click on this button directly once you’ve uploaded the required documents and information.

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 have the option to choose the completion date manually.
The Submission of RFP activity step will be now marked in green color meaning that it is completed.

The following step, the RFP Launch, is now highlighted in orange, meaning that it is the one in process.
RFP LAUNCH

In this step the PMU is required to:

- Add/ Remove Bids (Optional);
- Upload the documents (Mandatory)
  - Issued request for proposal document;
  - Advertisement for Request for Proposals.
- Mark the activity as completed to proceed.

This is the symbol of the bidders list. This means that an action is required by the PMU at the level of the bidders list.
ADD/ REMOVE BIDS

1. Click on «Go to Bids» to go to the bidders table. The system will redirect you to the «Bids» tab under which bid information is included.

2. Click on Add Bid to add a new bidder in the bidders table.
Once you click on «Add Bid» button, a pop up window will be displayed on the screen where you will have the option to either add a vendor from the existing vendors database or adding a new vendor to the database by clicking on the «New Vendor» tab in the pop up window.

By default, the existing vendor database tab will be the one displayed in the pop up window.

1. Before adding any vendor, you must search for this vendor in the existing database using the filters displayed on the left side of the window.

2. If you wish to add the vendor, click on the «Add» button on the right side of the window.
ADD/ REMOVE BIDS

You can also create a new vendor by clicking on New Vendor tab.

In the pop-up window fill all the vendor information fields and click on Save.

Click on «Add» button to add the vendor to the bidders table.
The bidders table view will look like this and at the right side of the screen there is the possibility to add a document 📖, delete the vendor 🗑️, or add a comment 📣 for each specific bidder.

The comments will be displayed at the right side of the screen. Click on the «Save» button to save your comments.
RFP LAUNCH

Go back to the datasheet view and upload the mandatory documents (following the same procedure explained in slide n.7), then click on Complete.

In the pop-up window insert the Actual date of implementation (mandatory), add a comment (optional) and then click on continue to proceed.
PROPOSAL SUBMISSION DEADLINE & OPENING;

• Click on «Go to Bids» button;

• In the Bids view that will be opened, you will need to fill in whether each bidder have submitted or no their proposals by selecting Yes or No from the drop down menu in the “Submitted” column.

---

MAR-2000001403-AAA-0007-CS-QCBS
Plan (POMA (AAA) (2020)1403) Status: implementing

<table>
<thead>
<tr>
<th>Status</th>
<th>Submitted</th>
<th>Tech score</th>
<th>Tech eval.</th>
<th>Real out price</th>
<th>Eval. price</th>
<th>Financial score</th>
<th>Combined score</th>
<th>Comb. eval.</th>
<th>Rec. award</th>
<th>Awarded</th>
<th>Contract price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test ltd. - Budapest - Angola</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pending</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MBH - Mumbai - India</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pending</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
UPLOADING DOCUMENTS AT BIDDERS TABLE

- By clicking on the icon, you can upload documents related to each bidder in the bidders table.

- In the pop-up window click on upload and then follow the normal procedure for the upload (refer to slide no. 7);

- When the upload is completed, you can click on more and you will have the possibility to edit properties, add a new version or delete it.
• Once you have finished, click on save and return to the datasheet view.

• Upload the mandatory document (Minutes of Opening) and the other optional documents if available.

• Then click on «Complete», insert the actual date of completion and click on save to mark this step as completed.
This step refers to the second part of the activity implementation and is divided in:

1. Submission of Technical Evaluation Report;

In the following pages, we are going to show how each different step works.
SUBMISSION OF TECH. EVAL. REPORT

• Click on «Go to bids» to go to the bidders table;

• In the new page, under the column Tech. Eval., click on the dropdown menu and select Yes or No - whether the bidder has passed or not the Technical evaluation;

• If you enter Yes, under the column Tech. Score enter the relative technical score;

• Click on save to save the information inserted.
For each bidder, click on the document icon to upload the Technical Proposal Document if available.
SUBMISSION OF TECH. EVAL. REPORT

• Upload the Technical Evaluation Report (Mandatory) and submit the No Objection request as shown previously.

• Upon the issuance of IFAD No Objection for this step, click on Complete, and then click on continue to finish this step.
The next step is the Submission of Combined Evaluation Report.
Click on «Go to Bids» to start the step.
1. Fill the read out price column by selecting the currency in the dropdown menu and by inserting the price;
2. Fill the Eval. Price column with the evaluated price
3. Insert the financial score according to the evaluated price;
4. Fill the combined score (sum of Tech. Score and Financial Score)
5. Fill in Yes/No to identify whether the bidder has passed combined evaluation or not;

6. According to the best-combined score, fill in Yes/No the column Recommendation for Award (Recc. Award) to identify which bidder is recommended for award.
7. Click on save to save your information and proceed.
After having updated the bidders table and having uploaded the mandatory documents - Combined Evaluation Report and Minutes of Opening (Financial) – Click on «Request NO» button to request the No Objection from IFAD.

Once IFAD provides the No Objection, click on the «Complete» button to complete this step.
This is the last phase of the implementation of the activity and includes the following steps:

- Notice of Intent to Award & Standstill Period;
- Contract Award;
- Negotiations completed
- Submission of draft contract and MoN;
- Contract Signature.

In the following slide the process will be explained.
NOTICE OF INTENT TO AWARD & STANDSTILL PERIOD

Click on «Goto bids» to Upload the mandatory document – Notice of Intent to Award – in the bids table for each bidder and, if available, also the documents in the datasheet tab (i.e. De-brief document and complaint document);

Click on complete to mark this step as completed.
CONTRACT AWARD

The next step is to proceed with the award of the contract to the bidder recommended for award.

To proceed, click on «Go to bids» to go to the bidders table and identify the awarded bidder.
CONTRACT AWARD

For the recommended one you have to fill:

1. Awarded: select yes or no from the dropdown menu to identify whether the bidder was awarded the contract or not.

If not awarded, you have to go back to the previous step, select another bidder to pass the combined evaluation and then award the contract to the next ranked bidder.

Click on Save and go back to the datasheet tab.

The bidder recommended for the award will be now highlighted in blue, while the not recommended ones will be in highlighted pink as Rejected.
In the datasheet tab, upload the mandatory document – Notification of Award- and then click on Complete;

Insert the completion date and then click on Continue to proceed with the next step.
Once the negotiation has been completed, click on Complete and, as shown before, insert the actual date, then click on Continue to proceed with the last step.
Click on “Goto bids” to set the contract price and flag that this price is negotiated in the bids table.

Go back to the datasheet view and upload the Draft contract along with the Minute of Negotiations.

After you have uploaded both documents, you can proceed with the request for No Objection from IFAD for this step.

When IFAD provides the No Objection, proceed with the completion of this step by clicking on “Complete”.
The last step involves the upload of the Signed Contract which is a mandatory document.

Click then on Complete to complete the implementation process for your activity.
The status of the activity will be now changed from «Implementing» to «Completed» and all the activity steps will be marked in green.