MICROPUCHASING APPLICATION

USER MANUAL

TABLE OF CONTENETS

INTODUCTION: The Micropurchasing Application was developed and restructured to eliminate the recurring issue of Terms of Reference (TORs) being signed out or lost from the system before a corresponding procurement request could be initiated. The primary objective of the application is to **streamline and enforce a structured approval workflow** for procurement activities related to **goods**, **services**, and **individual consultancies**, thereby improving efficiency, traceability, and compliance.

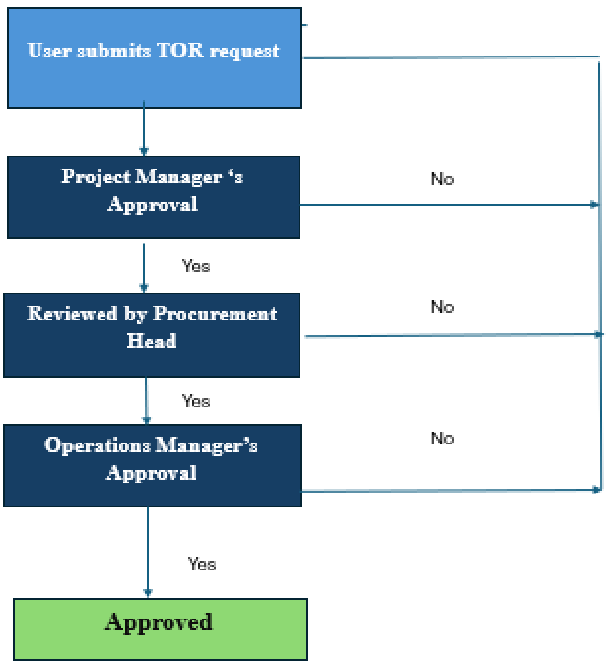
This application was built using **ASP.NET for the front-end and business logic layer**, with **SQL Server** serving as the back-end database. It ensures secure handling of procurement-related data and provides an organized framework for end-to-end processing of procurement requests, starting from TOR submission to the assignment of a case officer for final action.

LOGIN: User can login using their UNDP credentials through below url https://apps.undp.org.in/microPurchasingIC

APPROVAL FLOW:

MICRO PURCHASING | - APPROVAL FLOW

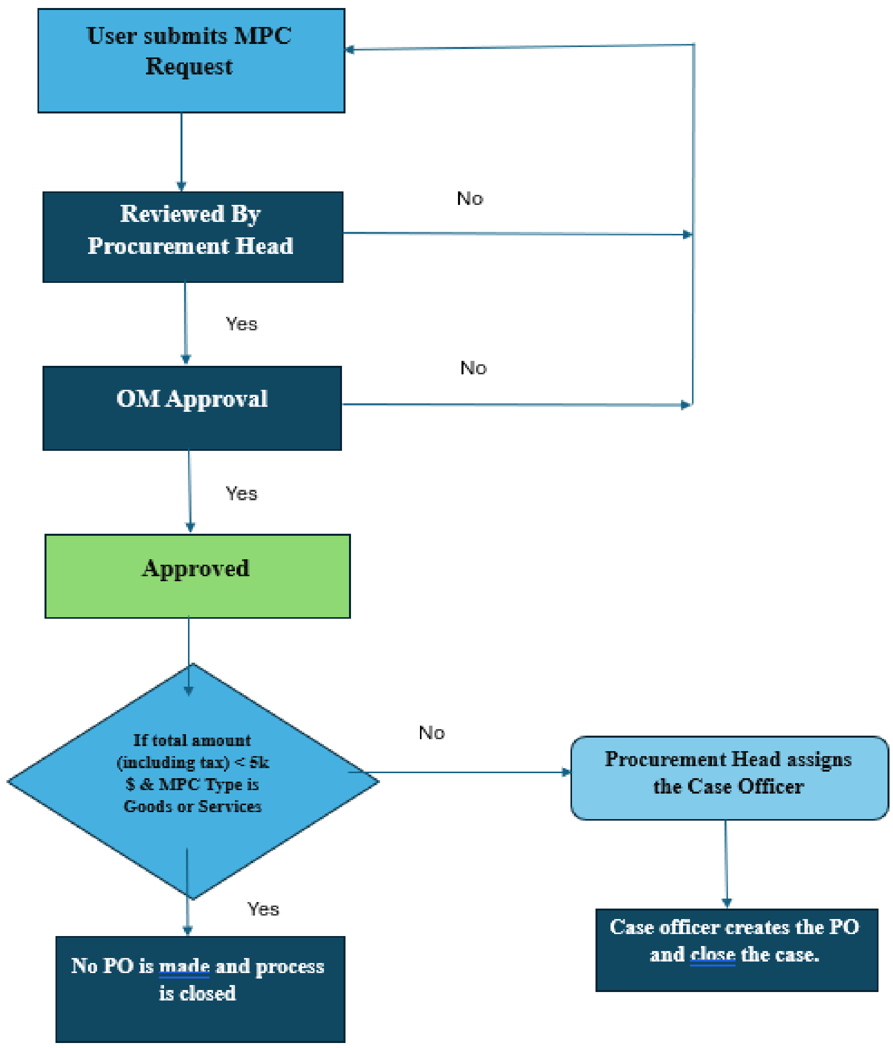
Part 1- TOR Approval



POINTS TO REMEMBER

- Once the TOR is approved the user / requestor can seek quotes and proceed to fill the Micro Purchasing request.
- A TOR request with **value greater than 10k $** will be closed at TOR approval level it's **procurement will not be added in the app**. User has to work with procurement outside the app for value > $10K

Part 2 - Micro Purchasing Approval



ADD TOR REQUEST: The **Add TOR** page is the main interface in the **MPC application** where users can initiate a **Terms of Reference (TOR)** request. This form is designed to capture all essential information required to configure the correct approval workflow and facilitate a smooth submission process.

Steps to Complete the Add TOR Form:

1. **TOR Title:** Begin by entering a clear and descriptive **title** for the TOR request.
2. **Select TOR Category:** Choose one or more applicable **categories** by checking the relevant boxes—**IC (Individual Contractor)**, **Goods**, or **Services**. Your selection determines the approval workflow that will be triggered after submission.
3. **Region and Country:** Select the appropriate **Region** and corresponding **Country** from the dropdown menus.
4. **Project Selection:** Choose the **related Project** to which this TOR request is linked.

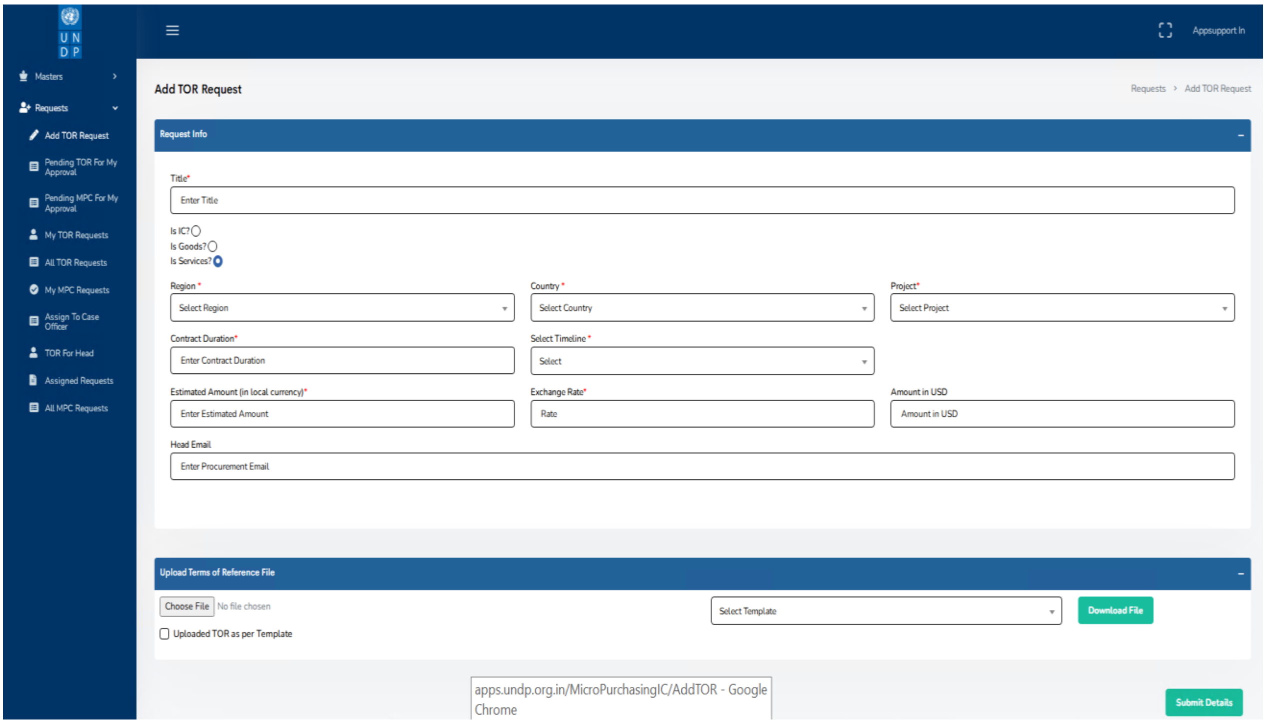
5. **Set Engagement Timeline:** Define the **timeline or duration** of the assignment to give clarity on the engagement period.

6. **Financial Details:** Provide the **Amount Paid in Local Currency** (if applicable), the **Exchange Rate**, and the resulting **Amount in USD**. The system may automatically calculate the USD amount based on the inputs.

7. **Head Email (Optional):** You may optionally enter a **Head Email ID** to notify a relevant stakeholder about this TOR submission.

8. **Download and Upload TOR Document:**
   - Click to **download the standard TOR template**, edit it with specific requirements, and then
   - **Upload** the revised TOR document back into the form, **don't forget to check the 'Uploaded TOR as per Template' checkbox** before clicking submit button.

9. **Submit the Request:** After completing all required fields, click the **Submit** button to initiate the approval workflow. The flow will be routed based on the selected **Category**, **Region**, and **Country**.



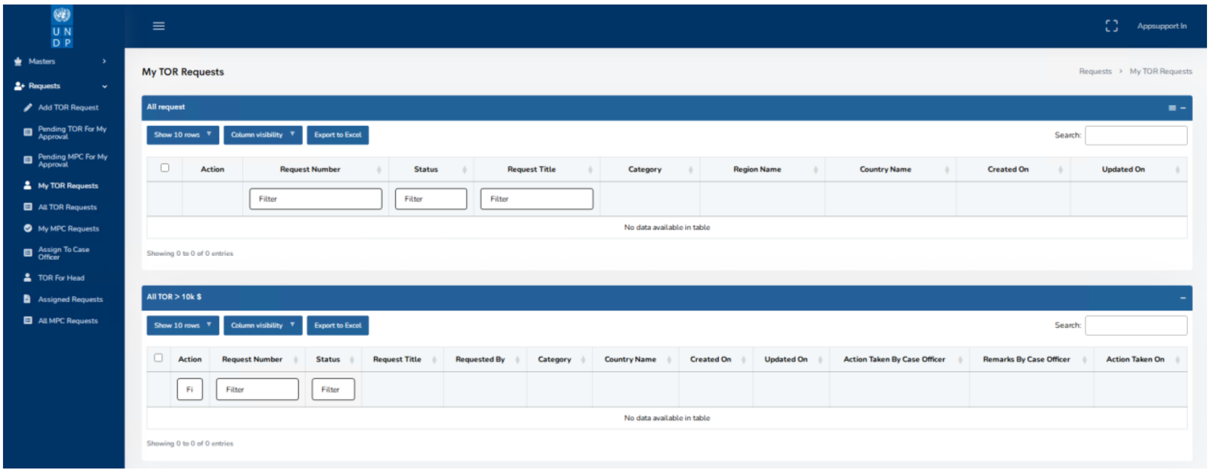
MY TOR TAB: The **MyTOR** page provides a personalized view for each user, listing all **Terms of Reference (TOR)** requests submitted by the currently logged-in user. It serves as a central dashboard to **track, manage, and take action** on submitted TORs.

Key Features of the MyTOR Page:

- Displays both categories of TORs:

- TORs with a total value **less than or equal to USD 10,000**
- TORs with a value **greater than USD 10,000**.

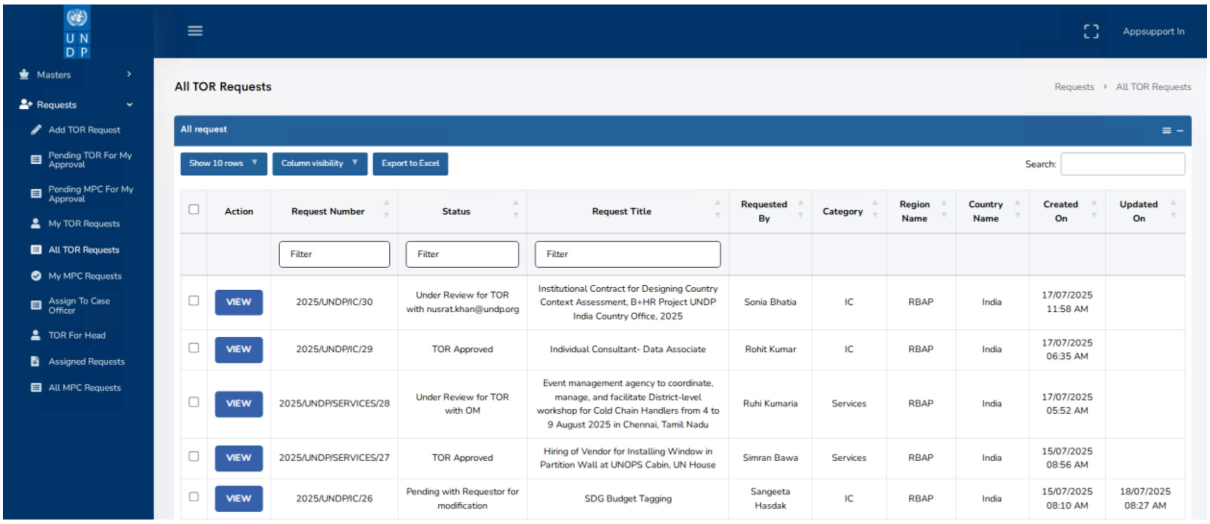
- View the real-time **status** of each TOR request (e.g., Pending, Approved, Returned).
- If a TOR is **returned by the approver**, the user is given the option to either **edit** the request and resubmit it or **delete** it entirely if no longer needed.
- Ensures transparency, traceability, and easy management of TOR submissions, allowing users to stay updated and act promptly when needed.



ALL TOR REQUESTS: The **All TOR Requests** page provides a comprehensive view of all Terms of Reference (TOR) submissions within the system, regardless of the user who created them. This tab is primarily designed for administrators or approvers to:

- **View the status** of all TOR requests across different users and categories
- **Track submissions** based on title, category, region, requester name, and dates
- **Monitor workflow progress** and identify pending actions

This centralized view ensures transparency, simplifies oversight, and helps in efficient decision-making throughout the approval process.



MY MPC REQUESTS TAB: The **My MPC Requests tab**—gives users a clear and organized view of all their procurement-related activities. It is divided into **three main sections**, each representing a different stage in the procurement process:

REQUESTS READY FOR PROCUREMENT SUBMISSION: This section lists all **TORs (Terms of Reference)** that have been fully approved and are now ready to move into the procurement phase.

What you can do:

- View important details such as the **Title, Category, Country, Region**, and **Approval Date**.
- Click action buttons to:
  - Start procurement entry
  - Upload vendor quotations
  - Fill in required procurement details

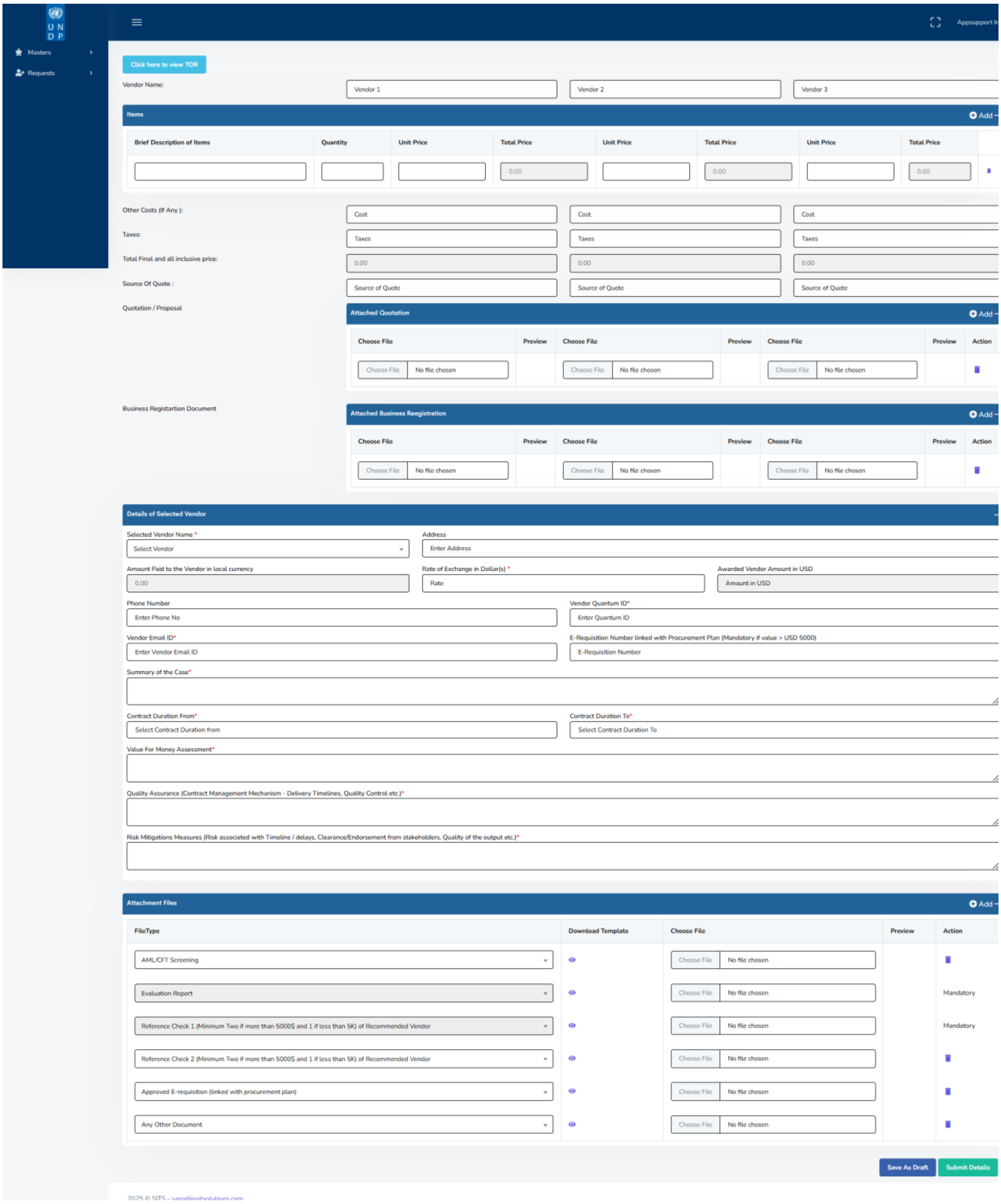
This helps ensure a smooth transition from approval to procurement, in line with the defined workflow.

ADD PROCUREMENT

When you click the **"Add"** button under the **My MPC Requests** tab, you will be redirected to a detailed **Procurement Entry Form**. This form is designed to capture all necessary information required to initiate a procurement request.

- **Vendor Details:** You will be required to provide information for each vendor, including:
  - Vendor Name, Item Description, Units and Quantity, Other Costs and Applicable Taxes, Source of Quotation
  - Upload relevant documents such as:
    - Quotation Documents, Business Registration Certificate (for Goods and Services)
    - CV (if applicable), Letter of Interest or Confirmation (for ICs)
- **Selected Vendor Information:** Once a vendor is selected, the following additional details must be filled in:
  - Vendor Contact Number and Email, Contract Duration, Total Amount to be Paid, Vendor ID, E-Requisition Number, Value for Money Justification, Summary of Procurement Need, Quality Assurance Measures, Risk Mitigation Strategies
- **Mandatory Attachments:** Based on the selected procurement category, the system will display a list of **mandatory documents** that need to be uploaded before submission.
- **Final Actions:** Once all required fields are completed and supporting documents are uploaded, you have two options:
  - **Submit** the request for approval
  - **Save as Draft** to complete and submit at a later time

This form is essential to ensure a transparent, standardized, and well-documented procurement process. It captures detailed vendor and item information, supports compliance, ensures accountability, and helps approvers make informed decisions. By streamlining data collection and reducing back-and-forth, it promotes efficiency, fairness, and traceability in procurement activities.



DRAFT PROCUREMENT REQUESTS: This table displays all procurement entries that you have started and saves as draft but not yet submitted. Used to :

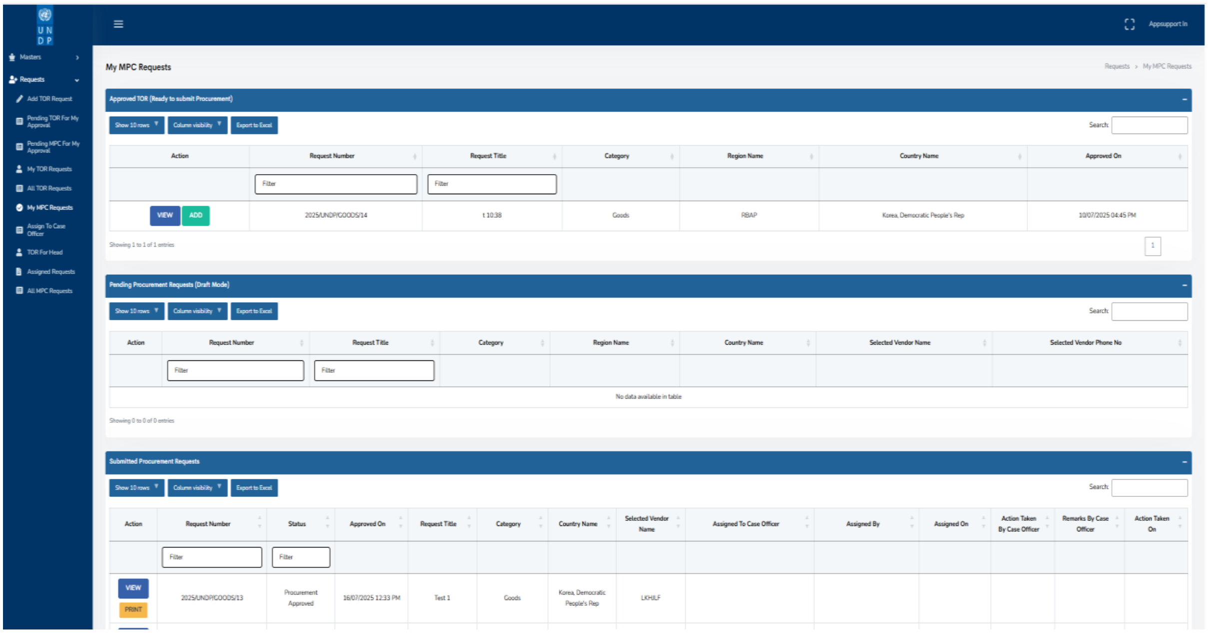
- Resume and continue editing draft requests
- Add or update vendor details, pricing, and required documents
- Submit the request once everything is complete

This feature ensures you can work at your own pace and come back later to complete any pending entries.

SUBMITTED PROCUREMENT REQUESTS: This section shows all procurement requests that have been **formally submitted**. Used to**:**

Track the progress and status of each request and view summary information such as: vendors involved, amounts, assigned approvers etc.

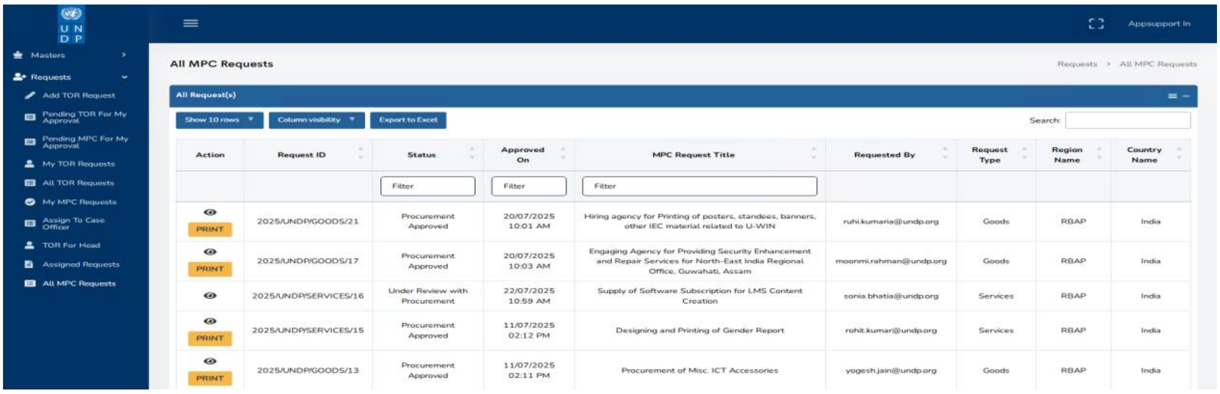
This section ensures transparency and helps users follow up on the progress of their submissions until final processing. Once approved requestor can download report as well.



ALL MPC REQUESTS : The **AllMPCRequests** page provides a consolidated view of all requests for which the **procurement section has been filled or submitted**. Key capabilities include:

- Monitoring procurement progress across requests
- Accessing information like selected vendors, quotations, financial details, and procurement documents
- Filtering and reviewing submitted procurement data for compliance and reporting

This page is essential for **procurement oversight**, enabling teams to track all MPC-related submissions and ensure they align with internal guidelines. Once approved user can download report.



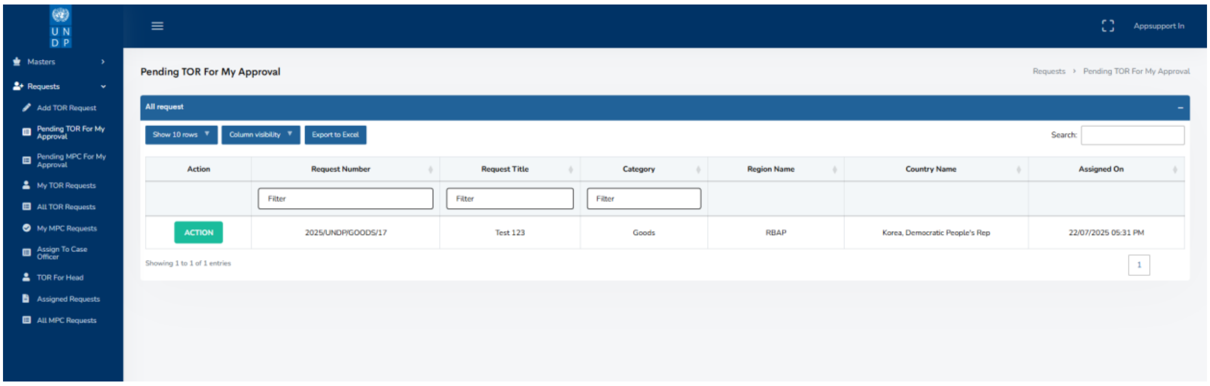
FOR APPROVERS

PENDING TORs FOR MY APPROVAL: The **Pending TORs for My Approval tab** is designed specifically for users serving in an approver role. It displays a list of **Terms of Reference (TOR)** requests that are currently **awaiting your review and action**.

Key features of this page include:

- A filtered view of **only those TOR requests assigned to you** as part of the configured approval workflow
- Display of essential request details such as:
  - **Request Title**
  - **Category**
  - **Region and Country**
  - **Submitted By**
  - **Submission Date**
- Action buttons that allow you to:
  - **View** the full TOR request and its attachments
  - **Approve/Reject** the request with optional comments

This page is intended to support **efficient task management** by providing you with direct access to pending TOR approvals, thereby facilitating **timely processing and continuity in the workflow**.



PENDING MPC FOR MY APPROVAL: The **Pending MOC for My Approval tab** functions similarly to the Pending TORs For My Approval Page,but is specifically focused on **procurement-related approvals**. It provides approvers with a streamlined view of procurement requests that are currently **awaiting their review and decision**.

Key features of this page include:

- A listing of **procurement requests assigned to you** as part of the approval workflow
- Display of critical information such as:
  - **Procurement Type**

- **Vendor Name**
- **Total Amount**
- **Requested By**
- **Region**

- Available actions to:
  - **Review** all submitted procurement documentation and supporting materials
  - **Approve** or **Reject** the request, with the option to provide comments or feedback
  - **Finalize your decision** to enable the procurement process to move forward

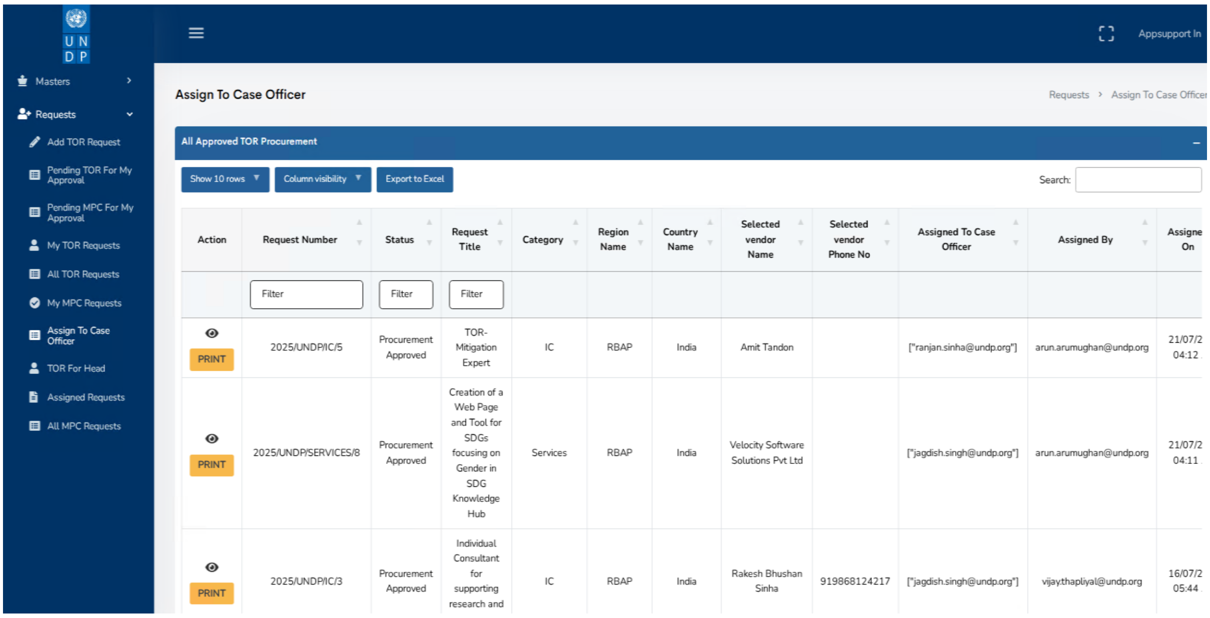
This page is designed to help you **manage your procurement tasks efficiently**, ensuring timely approvals and maintaining the **continuity and effectiveness** of the procurement workflow.

TOR FOR HEAD TAB: This page displays all TOR (Terms of Reference) requests in which the email address of the currently logged-in user was entered in the **Head Email** field at the time of submission. It allows Heads of Units or Departments to view and monitor requests where their review or oversight may be required, ensuring visibility and accountability in the TOR workflow.

ASSIGN TO CASE OFFICER TAB: All approved MPC (Micro-Purchasing Committee) requests are routed to the Procurement Head through the **Assign to Case Officer** tab. Here, the Procurement Head can:

- View the complete list of approved requests
- Print detailed reports for reference
- Review each request record
- Assign the request to a designated Procurement Focal Point for further processing

This step ensures proper delegation and tracking of procurement responsibilities within the team.

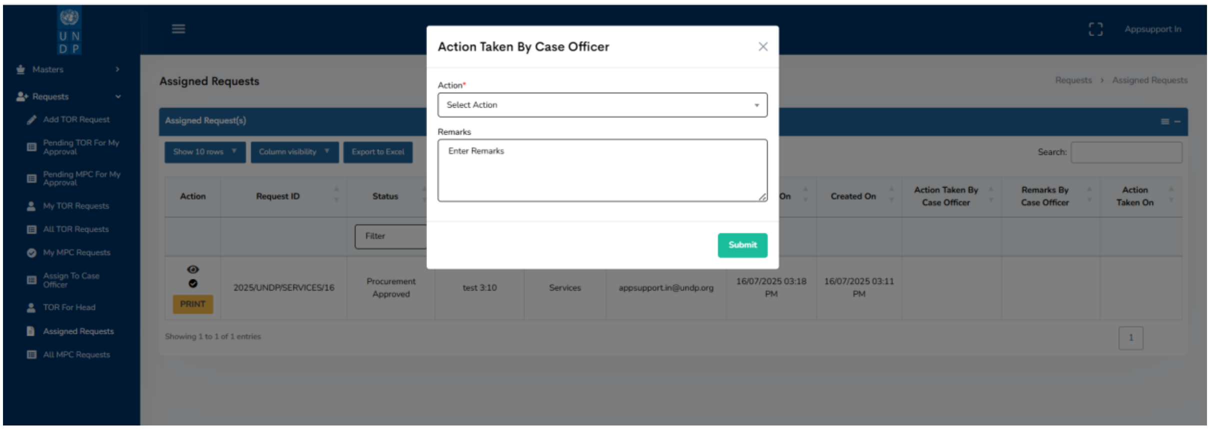


ASSIGNED REQUESTS TAB: Once the Procurement Head assigns a request to a specific Procurement Focal Point (Case Officer), it becomes visible to them under the **Assigned Requests** tab.

In this tab, the Case Officer can:

- View the details of the requests assigned to them
- Print the request information or related documents
- Record the action taken along with relevant remarks

This helps streamline task ownership and ensures accountability throughout the procurement process.



EMAIL NOTIFICATIONS

The app ensures transparency and timely communication through automated email notifications at each critical step of the process. Notifications are triggered when:

- A request is submitted – the relevant approvers are notified
- A request is approved or returned – the requestor receives an update
- A Case Officer is assigned or takes action – the requestor is informed
- A request moves from one approver to the next – the next approver receives an alert

This notification system helps keep all stakeholders informed and ensures smooth workflow progression.

NOTE: For any query write us at appsupport.in@undpo.org.