RFP APPROVAL APPLICATION



USER MANUAL

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1. INTRODUCTION

The **RFP Approval Application** is a specialized platform designed to streamline, standardize, and govern the review and approval workflow for procurement solicitations—including **ITB (Invitation to Bid), RFQ (Request for Quotation), and RFP (Request for Proposal)** along with associated Terms of Reference (TOR)—across all categories:

- **Individual Contractors (IC)**
- **Goods**
- **Services**

Primary Objectives:

- **Compliance & Governance:** Ensure all solicitation documents (ITB / RFQ / RFP / TOR) undergo mandatory technical, financial, and management review prior to market release and commitment.
- **Traceability & Transparency:** Maintain complete audit trails, timestamped reviewer logs, and real-time status tracking for every request submitted.
- **Operational Efficiency:** Eliminate communication delays and approval bottlenecks through integrated multi-tier review workflows and automated email notifications.

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2. LOGIN & ACCESS

Users can log in using their organizational credentials via Single Sign-On (SSO):

- **Application URL:** https://apps.undp.org.in/RF_Approval/

Upon successful authentication, users are directed to the main navigation menu based on their assigned roles (Requestor, Approver, or Department Head).

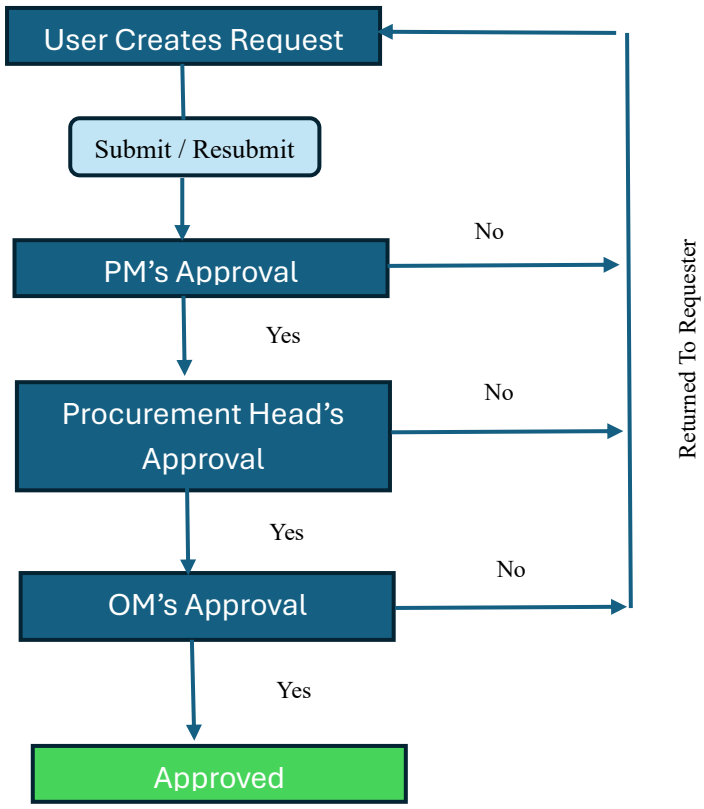
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3. APPROVAL FLOW

Every TOR submission follows a sequential review workflow based on the chosen category, region, and project hierarchy:

Key Rules of the Workflow:

1. **Sequential Review:** A request automatically routes to the next approver in line once the preceding approver grants approval.
2. **Return for Modification:** Any approver in the chain can return the TOR with comments. The request moves back to the requestor for revision and resubmission.
3. **No Threshold Splitting:** All TOR requests undergo the full required review chain to maintain institutional compliance.



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4. REQUESTOR MODULE

4.1 Add Request

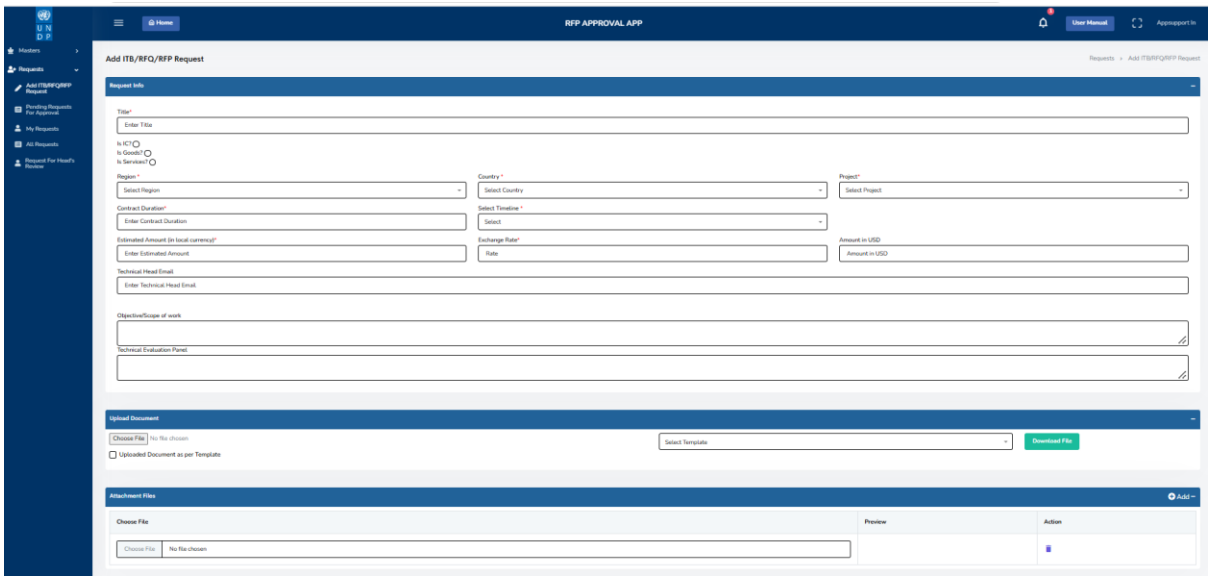
The **Add Request** page is where users initiate a new Terms of Reference for approval.

Steps to Submit a Request:

1. **Request Information:**
    - **Title:** Enter a descriptive, self-explanatory title for the assignment or procurement need.
    - **Category:** Select the applicable category:
        - IC (Individual Contractor)
        - Goods
        - Services
    - **Region & Country:** Select the respective Region and Country from the cascading dropdowns.
    - **Project:** Choose the corresponding project under which the activity is funded.

- **Contract Duration & Timeline:** Enter the proposed engagement duration and select the applicable timeline.

2. **Financial Information:**
    - **Estimated Amount (Local Currency):** Enter the estimated budget in local currency.
    - **Exchange Rate:** Enter the prevailing operational rate of exchange.
    - **Amount in USD:** The system automatically calculates and displays the USD equivalent.
3. **Department Head Notification (Optional):**
    - **Head Email:** You may optionally specify the Email ID of the Department/Unit Head to grant them visibility under their *TOR For Head* dashboard.
4. **Objective / Scope of Work (Mandatory):** Provide a concise summary of the primary objective, deliverables, background context, or detailed scope of work being solicited under this request.*(Note: This open-text field supports all standard punctuation, quotes, symbols, and formatting).*
5. **Technical Evaluation Panel (Mandatory):** Enter the proposed names, titles, and designations of the members selected to constitute the technical evaluation panel for reviewing submissions. *(Note: This is an open-text field allowing multiple member names, units, and roles).*
6. **Document Upload:**
    - **Download Template:** Click to download the standardized document template for the selected category.
    - **Upload Completed TOR:** Attach the finalized file (.pdf, .docx).
    - **Confirmation Checkbox:** Ensure the checkbox **"Uploaded Document as per Template"** is checked.
7. **Additional Attachments (Optional):**
    - Attach any supporting documentation (cost estimates, prior approvals, technical specifications).
8. **Submission:**
    - Click **Submit Details**. The request will be assigned a unique **Request Number** (e.g., 2026/UNDP/SERVICES/01) and routed to the first designated approver.



4.2 My Requests

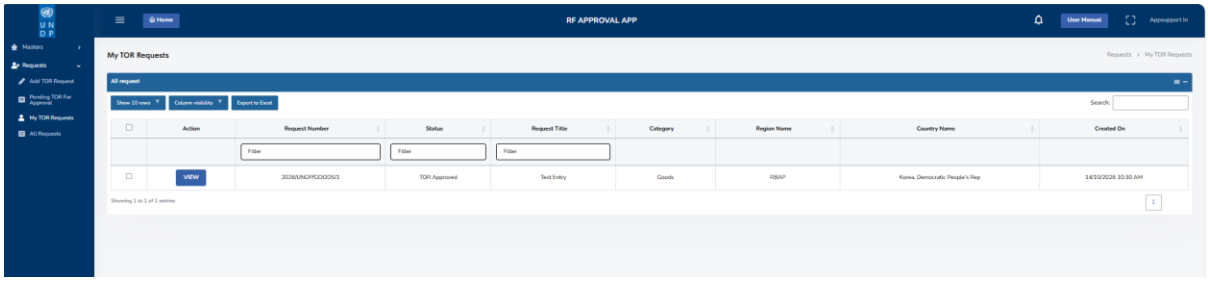
The **My Requests** page serves as the personal tracking dashboard for the logged-in user.

Features & Capabilities:

- **Real-time Status Tracking:** Monitor whether your submission is:
    - Under Review with [Approver Name / Email]
    - Pending with Requestor for Modification
    - TOR Approved
    - Rejected
- **Review Remarks & Audit History:** View chronological approver feedback and review notes.
- **Edit & Resubmit:** If a request is returned by an approver:

1. Click **Action → Edit**.
2. Review the approver's comments.
3. Update fields or re-upload the revised TOR document.
4. Resubmit the request back into the approval chain.

- **Export & Search:** Filter requests by status, title, or date, and export records to Excel.



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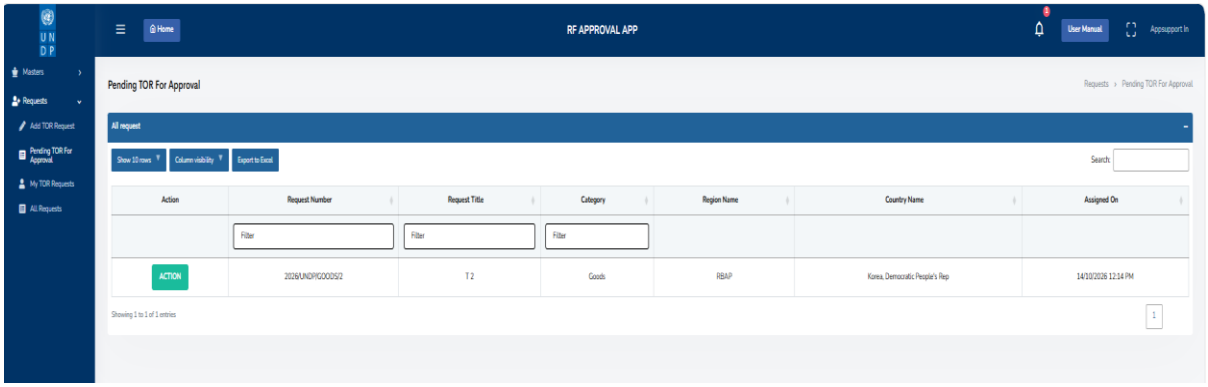
5. APPROVER MODULE

5.1 Pending For My Approval

Designed specifically for designated reviewers and approving authorities. This queue displays only the requests currently pending your explicit action.

Approver Actions:

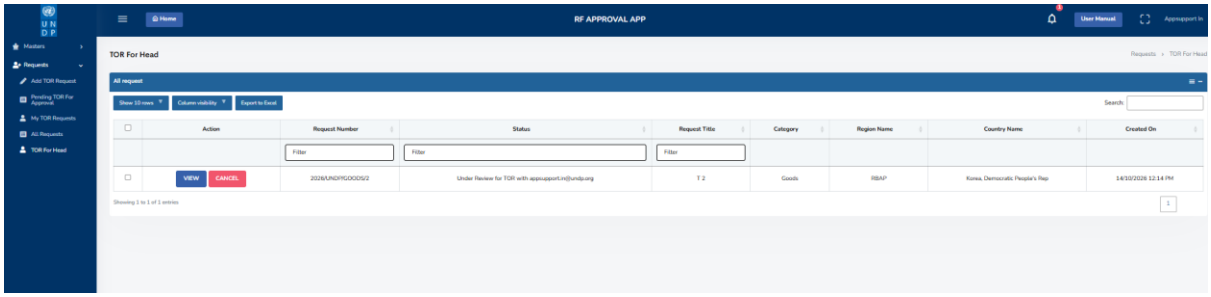
1. Click **Action** / **View** next to any pending request to open the approval modal.
2. Review the complete submission:
    - Project details, estimated financial figures, and duration.
    - Preview or download the uploaded **document** and supporting attachments.
    - Check previous approver comments and timestamp history.
3. Make a decision:
    - **Approve:** Moves the request to the subsequent approval level (or marks it as **TOR Approved** if you are the final approver).
    - **Return for Modification / Reject:** Sends the request back to the requestor. Approvers **must enter constructive remarks** specifying what needs correction before returning.



5.2 Request For Head's Review

This tab provides high-level visibility for Focal Points, Unit Heads, Section Chiefs, and Senior Managers:

- Lists all requests where the logged-in user's email address was entered in the FP **Head Email** field during submission.
- Enables management oversight of all ongoing initiatives, project commitments, and pipeline activities within their unit without requiring direct action in the approval queue.



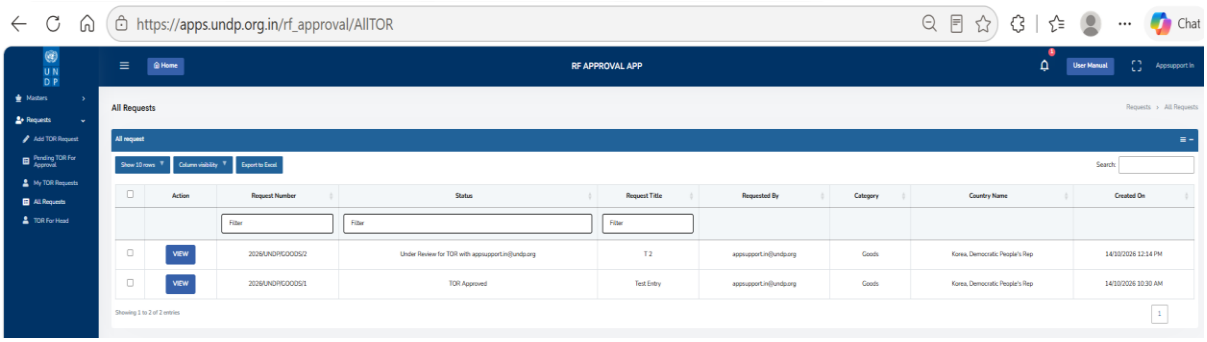
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6. ADMINISTRATION & OVERSIGHT

6.1 All Requests

The **All Requests** dashboard is available for administrative oversight, project coordinators, and auditors:

- **Global Visibility:** View all TOR submissions across all regions, categories, and users.
- **Advanced Filtering:** Filter by Request Number, Status, Requestor, Category, Country, and Creation Date.
- **Full Transparency:** Access the complete approval trail, approver timestamps, and signed-off documentation for any request.
- **Excel Export:** Download consolidated data reports for tracking and reporting purposes.



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7. AUTOMATED EMAIL NOTIFICATIONS

The system automatically triggers email notifications to relevant parties at every stage of the lifecycle:

Event	Recipient	Email Content
Request Submitted	First-Level Approver	Alert of a new request awaiting their review with direct link to action.
Stage Approved	Next-Level Approver	Notification that the previous stage approved the document and their action is now required.
Returned for Modification	Requestor	Notification that changes are required, including the approver's specific remarks.
Resubmitted by Requestor	Active Approver	Alert that the requestor has updated and resubmitted the request.
Final Request Approved	Requestor & Stakeholders	Official confirmation that the request has completed all review stages and is fully approved.

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8. SUPPORT & HELPDESK

For technical assistance, permission requests, or workflow queries, please contact the application support team:

- **Email:** appsupport.in@undp.org
- **Support Hours:** Monday – Friday, 9:00 AM – 5:30 PM IST