USER MANUAL

for

Procurement Management System

Version 1.0 approved

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Contents

Revision History

Name	Date	Reason For Changes	Version

1 Introduction

1.1 Purpose

The purpose of this document is to present a detailed description of each functionality provided, so the users can easily use the system without any trouble.

2 System Features

2.1 User Login

2.1.1 Description and Priority

Each user of this system will be required to provide correct login credentials to be able to use this system. This feature of high priority as only authorised users must be able to view and edit data handled by this system.

2.1.2 Stimulus/Response Sequences

The user must click on the Login tab located at the top right corner of the home page. This causes a drop down box to appear where the user can enter his/her user ID and password, following which the Sign in button has to be clicked. If the credentials entered exist in the database and are valid, the user will be taken to either the page meant for indentors or dealing officer or the procurement head based on their authorisation level retrieved from the database.

2.1.3 Functional Requirements

This system feature provides different types of functionality based on the authority of the user who has logged in. The different user types are

- Procurement Head
- Dealing Officer
- Indentor

2.2 View Purchase Requisition

2.2.1 Description and Priority

When an authorised indentor logs in to the system, he/she will be able to view all the purchase requisitions put forward by him/her. This feature is of medium priority as the indentor must be aware of the progress of his/her purchase requisitions.

2.2.2 Stimulus/Response Sequences

When an indentor logs in to the system, he/she will be directed to the page with a list of buttons on the left side. On clicking the 'View PRs' button, he/she will be able to view all the purchase requisitions put forward by him/her on a card on the right side of the page. Below the list of purchase requisitions, will be a drop down menu of purchase requisitions that have been assigned to a dealing officer. On selecting a purchase requition number from the drop down menu, the user will be able to view the current status of that purchase requisition.

2.2.3 Functional Requirements

As and when a purchase requisition is placed, each user must be able to view it along with other pending purchase requisitions put forward by him/her.This feature is of medium priority as the indentor must be aware of the progress of his/her purchase requisition.

2.3 Add Purchase Requisition

2.3.1 Description and Priority

When an authorised indentor logs in to the system, he/she will be able to add new purchase requisitions. This feature is of high priority as it the first step to the entire procurement process.

2.3.2 Stimulus/Response Sequences

When an indentor logs in to the system, he/she will be directed to the page with a list of buttons on the left side. On clicking the 'Add PR' button, he/she will be able to view text boxes to enter relevant details of the new purchase requisition on a card on the right side of the page. The user will be required to enter the name of the item in the first text box, quantity required in the second and a short description about specifications of the item required in the third text box and then click on the submit button. The system will then store these details, along with the date of addition and the department that made the purchase requisition.

2.3.3 Functional Requirements

The main function of an indentor is to put forward the needs of the department in the form of a purchase requisition so that the requirements can be met via the procurement process. This system feature allows the indentor to add new purchase requisitions.

2.4 Update Tender Evaluation Report

2.4.1 Description and Priority

When an authorised indentor logs in to the system, he/she will be able to update the status of a tender for a given purchase requisition. Once the tenders are evaluated by the respective departments, the indentor must indicate this by updating the status for each tender that was evaluated. This feature is of high priority as purchase orders can be placed only if tenders for a given purchase requisition are evaluated by the respective department.

2.4.2 Stimulus/Response Sequences

When an indentor logs in to the system, he/she will be directed to the page with a list of buttons on the left side. On clicking the 'Update Tender Evaluation Report' button, he/she will be able to select the purchase requisition number whose tenders have been evaluated from a drop down menu on a card on the right side of the page. On doing so, the user can then select the tender whose status has to be updated from a drop down menu present below the previous one. The user must then click on an 'Update status' button, following which the system will update the status of that tender to indicate that it was evaluated.

2.4.3 Functional Requirements

When a department completes evaluation of the various tenders received for a purchase requisition, the status must be updated so that the dealing officer can proceed with the remainder of the procurement process. This is the functionality provided by this system feature to an indentor.

2.5 View Pending Purchase Requisitions

2.5.1 Description and Priority

When an authorised dealing officer logs in, he/she will be able to view all the purchase requisitions that have not yet been completed. This feature is of medium priority as the dealing officer will need to know what the current status of each incomplete purchase requisitions is, from which he/she can decide what actions are to be taken in order to complete them.

2.5.2 Stimulus/Response Sequences

When a dealing officer logs in to the system, he/she will be directed to the page with a list of buttons on the left side. On clicking the 'Pending PRs' button, he/she will be able to view a list of his/her incomplete purchase requisitions and its details like date of creation, item, quantity of item required, description of the item required and current status of the purchase requisition on a card on the right side of the page.

2.5.3 Functional Requirements

A dealing officer must be aware of the purchase requisitions that have still not been converted to a purchase order, so that he/she can complete the procurement process for each purchase requisition. This system features provides this functionality to the dealing officer.

2.6 View Completed Purchase Requisitions

2.6.1 Description and Priority

When an authorised dealing officer logs in, he/she will be able to view all the purchase requisitions that have been successfully completed by him/her. It include only those purchase requisitions for which a purchase order has been placed. This feature if of low priority.

2.6.2 Stimulus/Response Sequences

When a dealing officer logs in to the system, he/she will be directed to the page with a list of buttons on the left side. On clicking the 'Completed PRs' button, he/she will be able to view a list of purchase requisitions that have been successfully completed by him/her and its details like date of creation, item, quantity of item required and description of the item required on a card on the right side of the page.

2.6.3 Functional Requirements

The functionality provided by this system feature is to display all the purchase requisitions that have been completed by the dealing officer so far.

2.7 Float Tenders

2.7.1 Description and Priority

When an authorised dealing officer logs in, he/she will be able to float tenders for any purchase requisition that has been assigned to him/her by the procurement head. This feature is of high priority as, floating tenders lets suppliers know that there is a demand for the item mentioned in the tender so that suppliers can send in samples of the item they can provide.

2.7.2 Stimulus/Response Sequences

When a dealing officer logs in to the system, he/she will be directed to the page with a list of buttons on the left side. On clicking the 'Float Tender' button, he/she will be able to select a purchase requisition for which a tender has to be floated in a drop down menu present on a card on the right side of the page. The dealing officer may then enter the bid opening date in a text box present next to the drop down menu. The dealing officer then has to click on the submit button which causes the system to store details of the newly floated tender like the date on which tender was floated and the bid opening date in the database.

2.7.3 Functional Requirements

Inorder to inform suppliers that there is a demand for the required items, tenders need to be floated. This functionality is to provided to the dealing officer by this system feature.

2.8 Add Extension Date

2.8.1 Description and Priority

When an authorised dealing officer logs in, he/she will be able to extend the last date by when suppliers have to send in their samples. Normally, a dealing officer can provide only two such extensions. This feature is of medium priority.

2.8.2 Stimulus/Response Sequences

When a dealing officer logs in to the system, he/she will be directed to the page with a list of buttons on the left side. On clicking the 'Add Extension Date' button, he/she will be able view a card on the right side of the page which would be divided into two sub parts, one for adding the first extension date and the other for adding the second extension date. In each of these sub parts, the dealing officer can select the purchase requisition from a drop down menu and then select the tender whose bid opening date has to be extended from the second drop down menu. He/she will then have to enter the extended date in a text box present next to the drop down menu which displayed tenders and then click on the submit button to ensure that the system, records this extension of date in the database.

2.8.3 Functional Requirements

Normally, the last date to submit tenders is extended. The dealing officer must be able to update this date as and when an extension is to be provided. He/she can do so with the help this system feature.

2.9 Change Tender Status

2.9.1 Description and Priority

When an authorised dealing officer logs in, he/she will be able to update the status of a tender as and when sub processes of the procurement process are completed. This feature is of high priority as maintaining status of the tenders helps the dealing officer deecide what action is to be performed next for each tender.

2.9.2 Stimulus/Response Sequences

When a dealing officer logs in to the system, he/she will be directed to the page with a list of buttons on the left side. On clicking the 'Float Tender' button, he/she will be able to select a purchase requisition whose tender's status has to be updated in a drop down menu present on a card on the right side of the page. The dealing officer may then select the particular tender whose status has to be updated from a drop down menu and then click on submit which causes the system to update the status of the tender in the database.

2.9.3 Functional Requirements

After the completion of each step in the procurement process the status of the purchase requisition must be updated so the indentor and dealing officer are aware of how much progress has been made in the process. This functionality is provided to the dealing officer by this system feature.

2.10 Select Final Tender

2.10.1 Description and Priority

When an authorised dealing officer logs in, he/she will be able to select the tender to be finalised for a given purchase requisition assigned to him/her. This feature is of high priority as finalizing a tender will will ultimately lead to the creation of a purchase order.

2.10.2 Stimulus/Response Sequences

When a dealing officer logs in to the system, he/she will be directed to the page with a list of buttons on the left side. On clicking the 'Select Final Tender' button, he/she will be able to select a purchase requisition for which a tender has to be finalized in a drop down menu, present on a card on the right side of the page. The dealing officer may then select the tender which has been evaluated,,k,kk from the drop down menu. The dealing officer then has to click on the submit button which causes the system to remove the other tenders for that purchase requisition and update the status of the selected tender.

2.10.3 Functional Requirements

When a purchase requisition receives many samples from different suppliers, the department that put forward the purchase requisition must be allowed to evaluate them and then finalise on one that is most suited to their requirements and they must indicate that this step has been completed by updating the status for that tender. The indentor can do so with the help of this system feature.

2.11 View Unassigned Requests

2.11.1 Description and Priority

On logging in, the procurement head will be able to view all the requests from every department that have not been assigned to a dealing officer yet. This feature is of high priority as it helps the procurement head to ensure that no request goes unassigned.

2.11.2 Stimulus/Response Sequences

When the procurement head logs in to the system, he/she will be directed to a page with a list of buttons on the left side. On clicking the 'View Unassigned Requests' button, a card on the right side of the page will display all the requests that have not yet been assigned to any dealing officer. Details like item, quantity required, description of item features and date of creation of the request will be displayed

2.11.3 Functional Requirements

When new requests come into the system from various departments, they must be assigned to a dealing officer who will handle the request. This functionality is provided to the procurement head by this system feature.

2.12 View Assigned Purchase Requisitions

2.12.1 Description and Priority

On logging in, the procurement head will be able to view all the purchase requisitions that have been assigned to a dealing officer. This feature is of low priority.

2.12.2 Stimulus/Response Sequences

When the procurement head logs in to the system, he/she will be directed to a page with a list of buttons on the left side. On clicking the 'View Assigned Requests' button, a card on the right side of the page will display all the requests that have been assigned to a dealing officer. Details like item, quantity required, description of item features and date of creation of the request will be displayed.

2.12.3 Functional Requirements

Once a request has been assigned to a dealing officer it becomes a purchase requisition and the procurement head must be able to view the list of purchase requisitions currently being handled by the dealing officers. This system feature provides the mentioned functionality to the procurement head.

2.13 Assign Requests to Dealing Officer

2.13.1 Description and Priority

On logging in, the procurement head will be able to assign the unassigned requests to dealing officers based on the number of requests already being handled by them. This feature is of high priority as it helps the procurement to evenly distribute the work load among the dealing officers.

2.13.2 Stimulus/Response Sequences

When the procurement head logs in to the system, he/she will be directed to a page with a list of buttons on the left side. On clicking the 'Assign Task' button, a card on the right side of the page will display two sub parts. The first sub part will display a list of dealing officers and the number of requests currently being handled by them. The second sub part will allow the procurement to select the unassigned request and a dealing officer to whom it must be assigned from drop down menus. On clicking the submit button, the system will update the database accordingly.

2.13.3 Functional Requirements

The main function of the procurement head is to assign requests to dealing officers who will handle the procurement process for it. This functionality is provided to the procurement head by this system feature.