STEP

SYSTEMATIC TRACKING OF EXCHANGES IN PROCUREMENT

User Guide

July 2016

STEP SYSTEMATIC TRACKING OF EXCHANGES IN PROCUREMENT

DESIGN & DRAFTED
FOR
IMPLEMENTING AGENCIES

User Guide

Fraud & Corruption Hotline:
1-202-458-7677

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Abbreviation

AML	Anti-Money Laundering
API	Application Programming Interfaces
APM	Accredited Practice Manager
APS	Accredited Procurement Specialist
CFT	Combating the Financing of Terrorism
CRPD	Company Risk Profile Database
ENO	Electronic No Objection System
IA	Implementing Agency
ICB	International Competitive Bidding
NCB	National Competitive Bidding
PIU	Project Implementation Unit
OPCS	Operations Policy and Country Service
OPRC	Operations Procurement Review Committee
PROCYS	Procurement Cycle Tracking System—Africa Region
SEPA	Sistema de Ejecución de Planes de Adquisiciones - Procurement Plan Management System (LAC & SAR Region)
STEP	Systematic Tracking of Exchanges in Procurement
TTL	Task Team Leader
UNDB	United Nations Development Business
UNSPSC	United Nations Standard Products and Services Code

Legends

Key Features

This icon will represent an important piece if information about STEP functionality that the user should be aware of in using STEP

Functionality

Specific issues about how STEP was designed will be addressed

1

Introduction

T his document provides an overview of the capabilities and functionality of the Bank's new Procurement Planning and Tracking System,

STEP - Systematic Tracking of Exchanges in Procurement. It is an introduction to the system and its value proposition, providing a high-level view of the system framework, core features, and functionality.

More information on STEP implementation timelines, support teams, and other learning resources is available on the Bank's STEP website.

Value Proposition

During the last 5 years, the Bank has moved towards the integration of existing institutional and regional procurement systems to enable the systematic planning and tracking of procurement activities throughout the project cycle, including online collaboration with Clients and recording service level standards through workflow.

The resulting system (STEP) is standardized across the Bank and brings all of these functions together in an integrated workspace. It provides access to tools the Bank and Clients can use to streamline procurement processes. Figure 1 captures the 5 key dimensions and functions of the STEP framework.

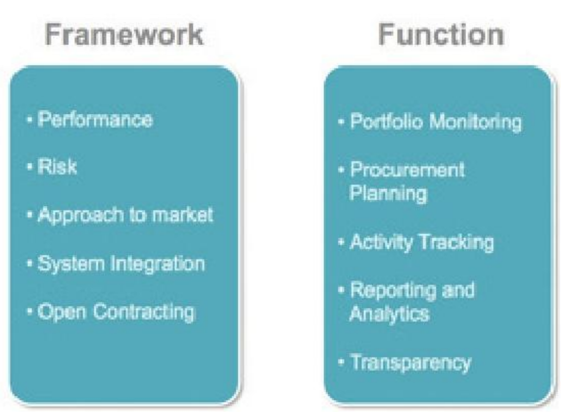


FIGURE 1: STEP Framework and Function

Bank and Clients will use STEP initially to create and later to revise Procurement Plans under Investment Project Financing (IPF), and to monitor performance, manage and store related documentation for all steps in a procurement activity. This will include both activities that are prior reviewed by the Bank and contracts subject to post review. Task Teams will also be able to view activities at several levels of aggregation, including activity, project, and portfolio levels. The term "portfolio" refers to all of the projects a specific staff member accessing the dashboard is assigned. For example, if a Procurement Specialist is mapped to 6 projects, the portfolio view will show aggregate information on those 6 projects.

STEP also enables the selection of the most appropriate approach to market as well as the procurement method, which includes the additional methods available under the new procurement policy. A mapping tool is provided in STEP to help staff and Clients map previously used methods such as International Competitive Bidding (ICB) and National Competitive Bidding (NCB) to a new nomenclature under the new procurement policy. For more information please visit the OPCS website on Procurement.

Regional systems such as The Procurement Plan Management System [Sistema de Ejecución de Planes de Adquisiciones - SEPA] and the Procurement Cycle Tracking System—Africa Region - PROCYS, will be migrated to STEP through a customized migration strategy defined by each region. As Figure 2 illustrates, an IT staging area has been set up in Operations Policy and Country Services (OPCS) to address the needs of other systems that may require data migration or linkages to STEP. In addition, the system provides a downloadable data transfer tool in Excel to help move existing procurement planning information from Client systems to STEP. Key procurement data collected by STEP will be provided through application programming interfaces (APIs) to facilitate open contracting and provide data users within and outside the Bank access to open data on IPF operations using STEP

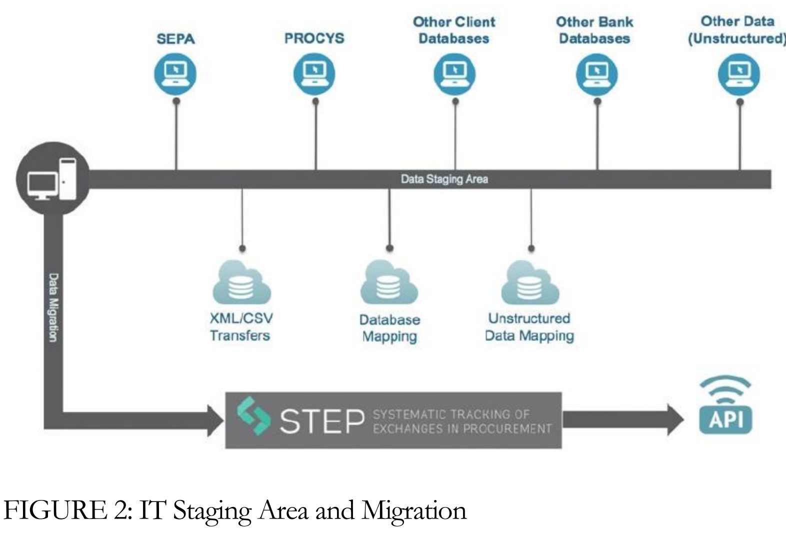


FIGURE 2: IT Staging Area and Migration

Online dashboards and reporting tools will help organize and manage procurement information at activity, project, and portfolio levels.

Various reporting tools will facilitate data analytics. STEP reports will be available through dashboards and the Business Intelligence Portal, which can all be downloaded to Excel. In FY16, OPCS plans to connect the Procurement App to STEP and provide mobile access to all procurement data for Apple and Android devices as well as the web.

Core Features and Functionality

Procurement Notices

Clients will use STEP to create and publish all procurement notices under the project, including the General and Specific Procurement Notices, Requests for Expression of Interest and for Pre-qualification, and Contract Award Notices. All data entered in STEP will be transferred to the appropriate Notice, which will enable streamlined publication by the Client through STEP. All Notices are published in the World Bank's external website and the United Nations Development Business (UNDB).

Procurement Planning

STEP's procurement planning features allows Clients to create and modify procurement plans. They can create new procurement activities throughout the project and select specific approaches to market and procurement methods for each activity. Features in the procurement planning module include: geo-tagging, classification of procurement spend based on the United Nations Standard Products and Services Code (UNSPSC) system, and identification of prior and post review levels. These new data points are captured to generate detailed market data, risk identification, and procurement performance reports.

Tracking

STEP allows Bank and Clients to monitor and track all procurement activities. Clients will determine and record the original time estimates for each step/stage in a specific procurement plan. STEP will capture all revisions to estimates and ultimately record the actual completion dates of all required procurement steps. This information is critical to help the Bank and Client assess the efficiency of the Client's procurement and the adequacy of the method selected, and make necessary adjustments in future procurement approaches.

Correspondence Systems

The Bank's Electronic No Objection System (ENO) has been simplified and integrated with STEP. The function now applies to all no objection steps in a prior review process to provide Bank and Client an interface for exchanging no objection requests, interim responses, and no objection letters. STEP tracks all correspondence exchanges and reports response times by Bank and Clients.

Once the Client submits a request for no objection in STEP to the Bank, the Task Team Leader (TTL) can request review by the Accredited Procurement Specialist (APS), a Technical Specialist, the Accredited Practice Manager (APM), or the Operations Procurement Review Committee (OPRC) and approve any number of steps within a procurement activity. STEP keeps track of the review time for each of these levels, which can later be extracted through STEP performance reports.

Supplier Eligibility

Verification of supplier eligibility is central to the Bank's fiduciary assurance process. STEP incorporates supplier verification at the time the Client selects a supplier and repeats this when the Client requests a no objection to a contract award.

The name and nationality of the selected supplier is verified against the Bank's sanction lists and internal anti-money laundering (AML) systems. This includes the United Nations, United Kingdom, United States, and European Union sanction lists under AML/ Combating the Financing of Terrorism (CFT), the list of debarred, cross-debarred, and suspended firms, and the list of companies in the Company Risk Profile Database (CRPD). STEP only shows Clients' verification results from the Bank's list of sanctioned firms, but shares the results with the Bank in the event of a match against the AML/CFT or CRPD systems, and Bank staff must carry out the required due diligence prior to clearing any contract awards.

STEP as a Compulsory System

STEP will ultimately be mandatory for all active IPF Operations. Clients will be given appropriate time to transfer the management of IPF operations to STEP as per the system rollout schedule defined by each region. Information on rollout schedules, and knowledge and learning support can be found on the STEP SPARK page. SPARK is the World Bank Group collaboration platform that replaced IFC's Collaborate and the World Bank's Scoop, which served their respective sponsors in the past.

The STEP SPARK page can be found at
https://spark.worldbank.org/groups/procurement-planning-and-tracking-tool

2

Step Instruction - How To Create a Procurement Plan and send for Approval

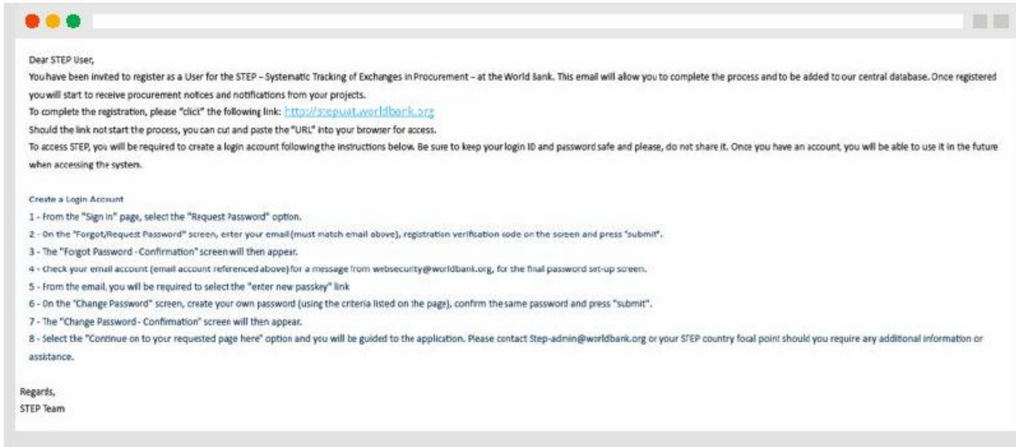
This section provides overview and instruction for Client users on the steps and processes required to create a Procurement Plan and send it for Bank's approval in STEP.

This module will guide the user in the following activities:

- Initial Registration
- Creating a Procurement Plan
- Identifying prior/post review contracts
- Creating procurement activities
- Reviewing a Procurement Plan before sending it for approval
- Procurement Classification (UN Classification system)
- Uploading Activities from Excel Template
- Creating General Procurement Notice (GPN)

2.1 Creating a Procurement Plan - Initial Registration

After the project has been setup in STEP via the Implementing Agency (IA) process by Bank, the Client user will receive an initial email with welcome information. The email contains a link to access STEP login and complete the registration process. (Figure 3).


Dear STEP User,

You have been invited to register as a User for the STEP – Systematic Tracking of Exchanges in Procurement – at the World Bank. This email will allow you to complete the process and to be added to our central database. Once registered you will start to receive procurement notices and notifications from your projects.

To complete the registration, please "click" the following link: http://stepuat.worldbank.org

Should the link not start the process, you can cut and paste the "URL" into your browser for access.

To access STEP, you will be required to create a login account following the instructions below. Be sure to keep your login ID and password safe and please, do not share it. Once you have an account, you will be able to use it in the future when accessing the system.

Create a Login Account

1 - From the "Sign In" page, select the "Request Password" option.

2 - On the "Forgot/Request Password" screen, enter your email (must match email above), registration verification code on the screen and press "submit".

3 - The "Forgot Password - Confirmation" screen will then appear.

4 - Check your email account (email account referenced above) for a message from websecurity@worldbank.org, for the final password set-up screen.

5 - From the email, you will be required to select the "enter new passkey" link

6 - On the "Change Password" screen, create your own password (using the criteria listed on the page), confirm the same password and press "submit".

7 - The "Change Password - Confirmation" screen will then appear.

8 - Select the "Continue on to your requested page here" option and you will be guided to the application. Please contact Step-admin@worldbank.org or your STEP country focal point should you require any additional information or assistance.

Regards,

STEP Team

FIGURE 3: Initial email from the STEP system

Functionality

The next steps detail how to complete the registration process.

Upon clicking the link, the user is then taken to the Bank Security page (Figure 4).

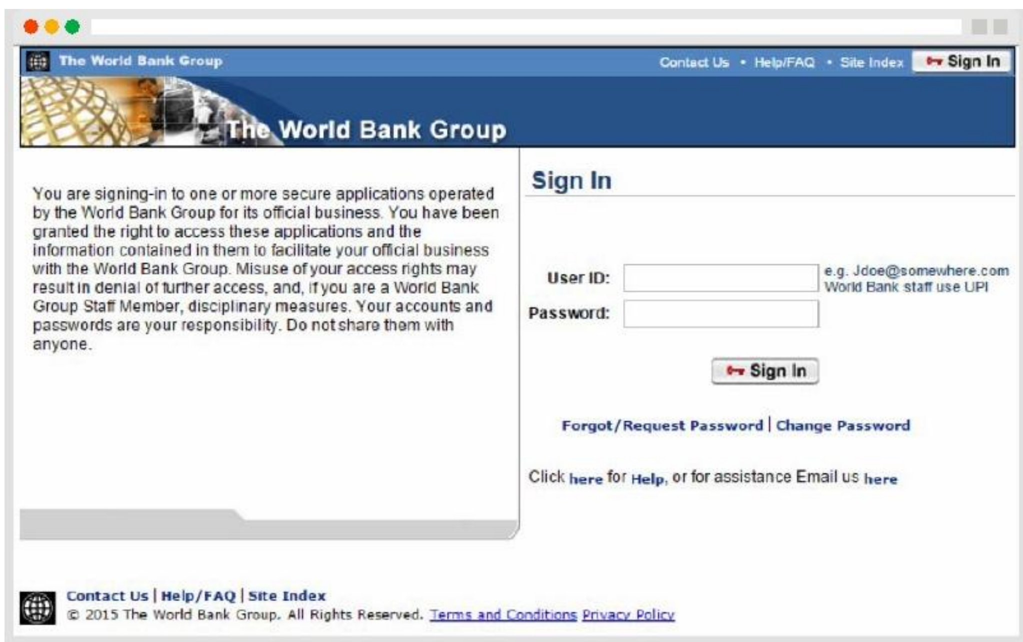


FIGURE 4: Bank's security page for initial registration

The user will need first to click the Forgot/Request Password link, which will then take the user to the ***Forgot/Request Password*** screen (Figure 5).

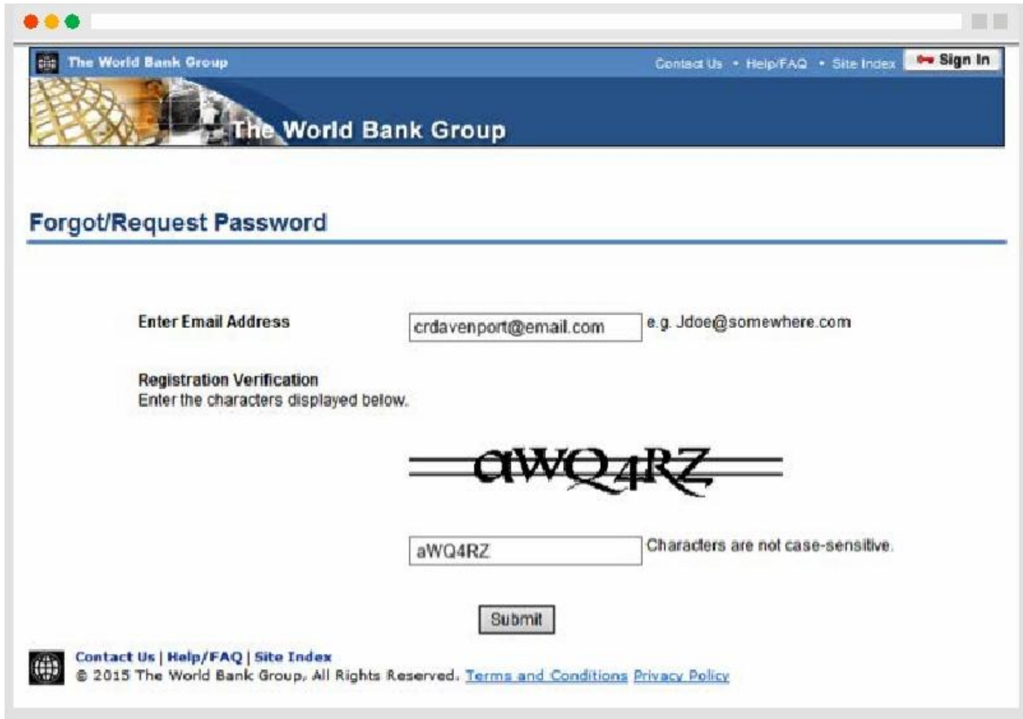
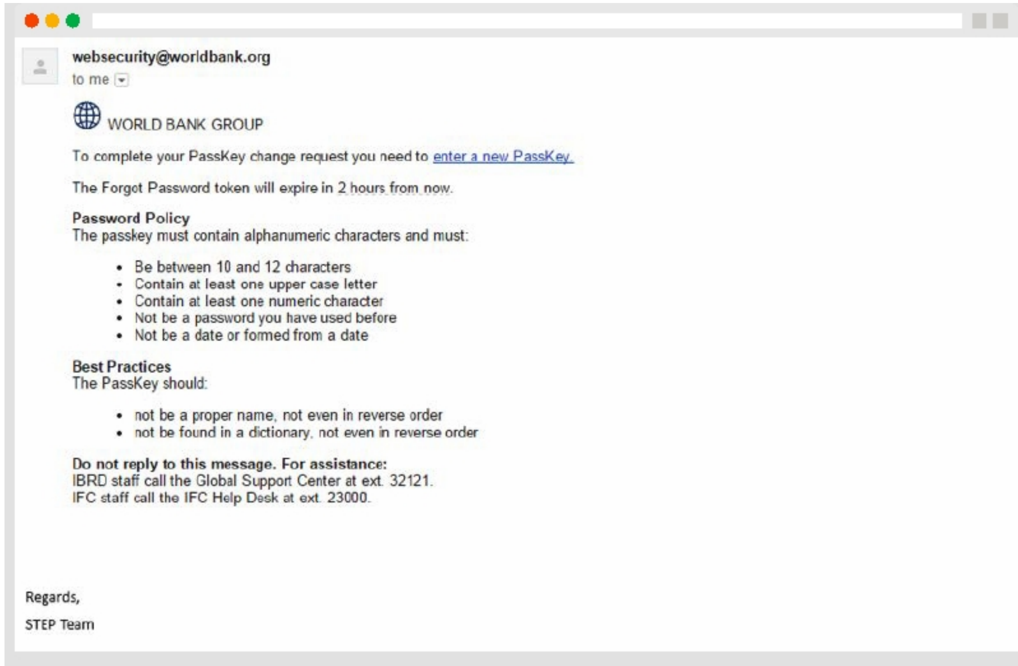


FIGURE 5: Forgot/Request Password screen

The user will enter their email in the email field, and enter the security code listed. After completing the information, click the ***Submit*** button.

The system then sends an email to the user from WB Security. Click the link ***enter a new PassKey*** in the email. (Figure 6).



websecurity@worldbank.org
to me

WORLD BANK GROUP

To complete your PassKey change request you need to enter a new PassKey.

The Forgot Password token will expire in 2 hours from now.

Password Policy
The passkey must contain alphanumeric characters and must:

- Be between 10 and 12 characters
- Contain at least one upper case letter
- Contain at least one numeric character
- Not be a password you have used before
- Not be a date or formed from a date

Best Practices
The PassKey should:

- not be a proper name, not even in reverse order
- not be found in a dictionary, not even in reverse order

Do not reply to this message. For assistance:
IBRD staff call the Global Support Center at ext. 32121.
IFC staff call the IFC Help Desk at ext. 23000.

Regards,
STEP Team

FIGURE 6: System generated email for creating a PassKey

Key Features

Be sure to follow the instructions in the email for creating the PassKey.

The Password Policy is to create alphanumeric characters, and must:

- Contain between 10 and 12 characters
- Contain one upper case letter
- Contain at least one numeric character
- Not be a password you used before
- Not be a date or formed from a date

Users must follow these conventions to create a valid password.

After clicking the link to create the new PassKey, the user returns to the Bank landing page to enter the new password.

This will be your new password to access STEP.

Enter the password in the ***New Password*** field, and then re-enter the password in the ***Confirm New Password*** field (Figure 7).

After entering the password, click the ***Submit*** button.

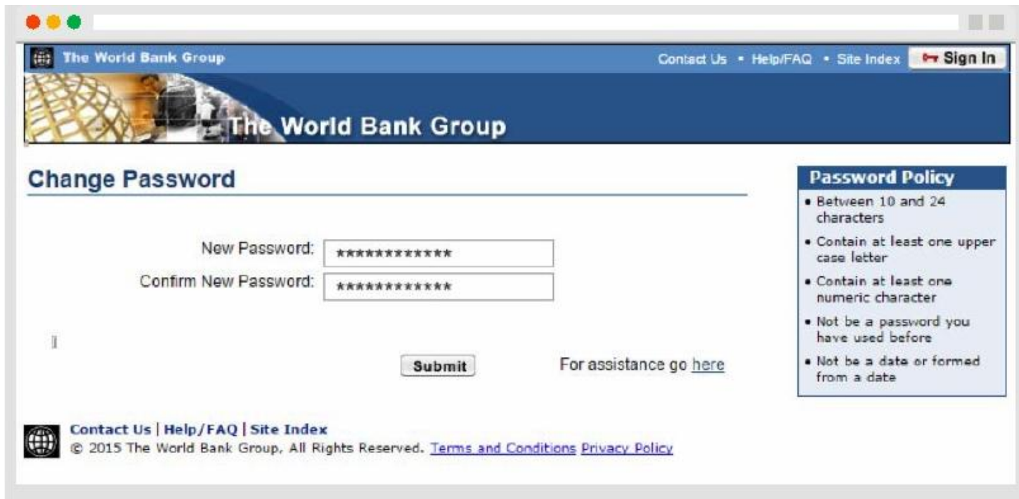


FIGURE 7: Creating the new password to access STEP

Enter your email and newly created password credentials, and click the Submit button to log into STEP (Figure 8).

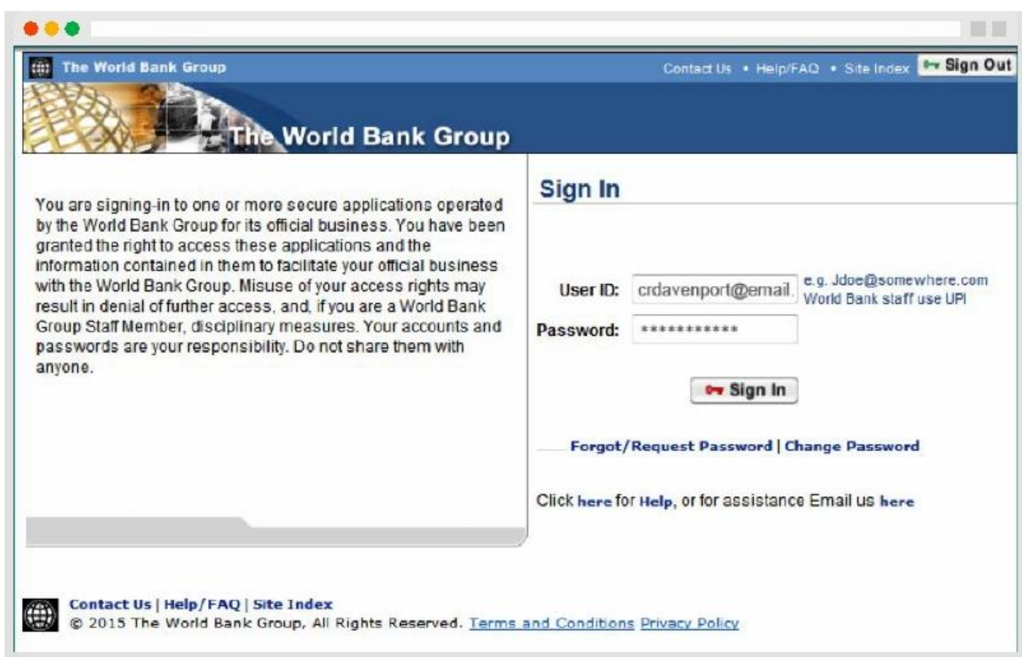


FIGURE 8: Signing into STEP

The initial registration process is now complete. The user can now sign into STEP, and begin creating the Procurement Plan.

Users can log in at anytime by accessing ***www.step.worldbank.org*** and press the "login" button, and be taken to the STEP login page (Figure 9).

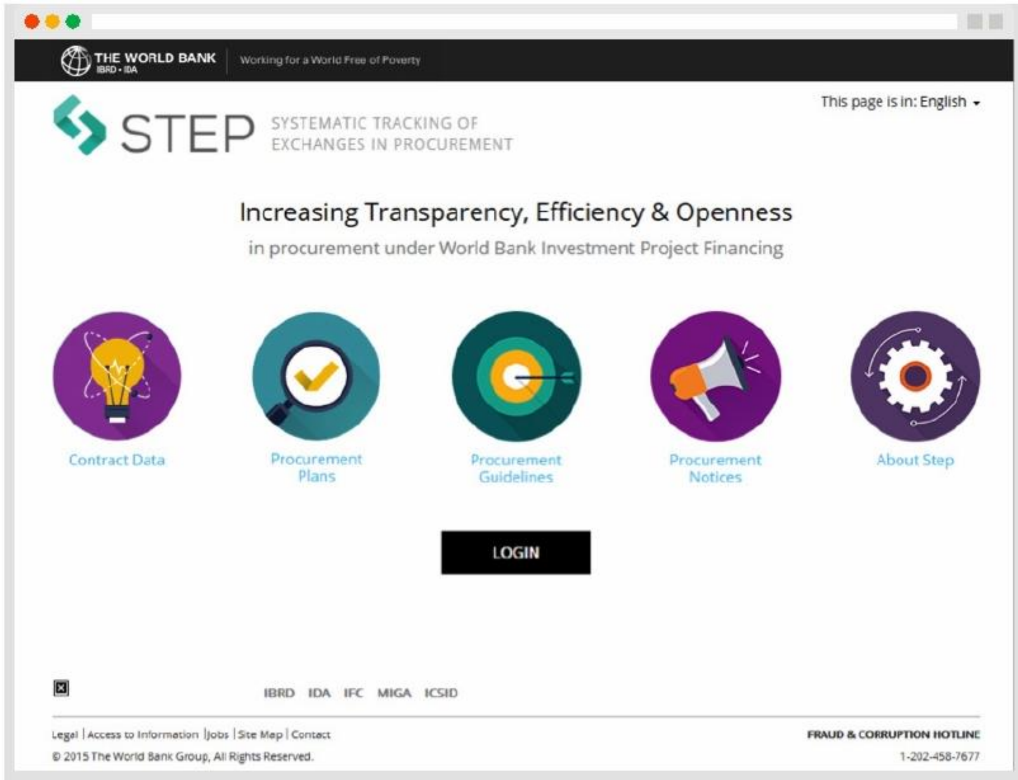


FIGURE 9: STEP login page

Key Features

Please do not share your user name and password. Each STEP user must have their own account.

2.2 Creating a Procurement Plan - Adding Activities

After log into STEP under "My Projects" on the left- hand navigation menu, click on ***Procurement Plan***. This takes the user to the Procurement Plan screen. On the Procurement Plan screen, there are currently no activities as this project is new (Figure 10).

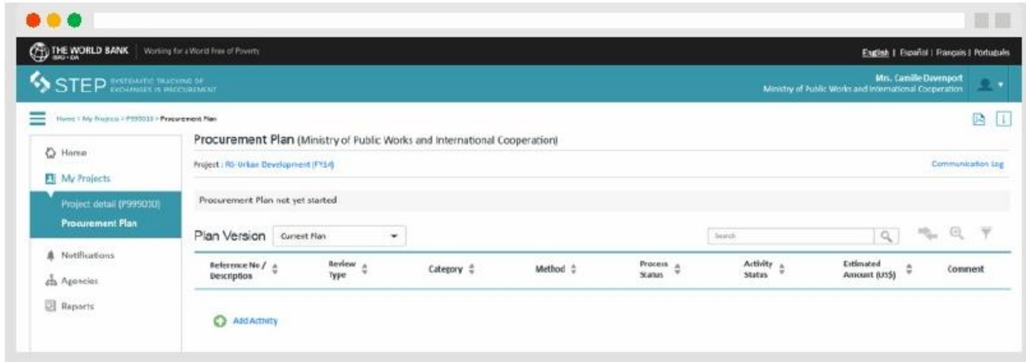


FIGURE 10: Project Plan screen

Click on ***Add Activity*** to create a new activity for this Procurement Plan.

On the ***Activity Creation*** screen, the user will begin to create the details for the new activity within the new Procurement Framework. The ***Activity Detail*** screen (Figure11) is made up of the following input areas:

- Key Details
- Related Details
- Components
- Loan/Credit Number
- Procurement Classification (UNSPSC)

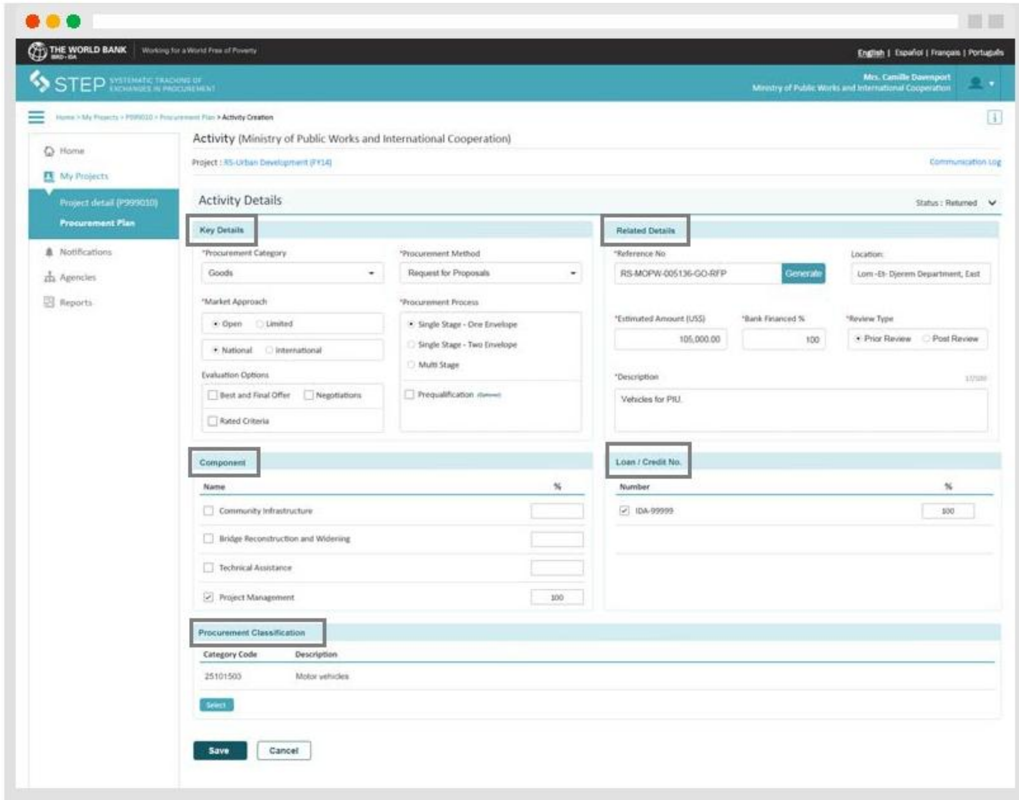


FIGURE 11: Activity Details screen

2.2.1 Creating a Procurement Plan - Activity Details screen - Key Details

The Key Details area is composed of the following elements:

- Procurement Category - The following categories are available to be selected from the drop down menu:
  - Goods
  - Civil Works
  - Consultant Services
  - Non-Consulting Services
- Procurement Method - The following methods are available to be selected from the drop down menu, depending on the category chosen:
  - Goods

  - Request for Proposals
  - Request for Bids
  - Request for Quotations
  - Direct Selection
  - Competitive Dialog
  - UN Agencies (Direct)
  - E-Auctions
  - Imports
  - Commodities
  - Community Driven Development
  - Alternative Procurement Arrangement
  - Commercial Practices
- Civil Works
  - Request for Proposals
  - Request for Bids
  - Request for Quotations
  - Direct Selection
  - Competitive Dialog
  - UN Agencies (Direct)
  - Community Driven Development
  - Force Account
  - Alternative Procurement Arrangement
  - Public Private Partnerships
  - Commercial Practices

- Consultant Services
  - Quality and Cost-Based Selection
  - Fixed Budget Selection
  - Least Cost Selection
  - Quality Based Selection
  - Consultant Qualification Selection
  - Direct Selection
  - Individual Consultant Selection
  - UN Agencies (Direct)
  - Non-Profit Organizations
  - Banks
  - Procurement Agents
  - Alternative Procurement Arrangement
  - Commercial Practices
- Non-Consulting Services
  - Request for Proposals
  - Request for Bids
  - Request for Quotations
  - Direct Selection
  - Competitive Dialog
  - UN Agencies (Direct)
  - E-Auctions
  - Community Driven Development
  - Force Account

- Alternative Procurement Arrangement
- Public Private Partnerships
- Commercial Practices

NOTE: For further information on the new procurement framework policy, please visit: http://web.worldbank.org/WBSITE/EXTERNAL/PROJECTS/PROCUREMENT/0,,pagePK:84271~theSitePK:84266,00.html

To complete the Activity Details information as shown in Figure 12, Click on the ***Procurement Category*** selection dropdown to select a procurement category. In this example, ***Goods*** is selected.

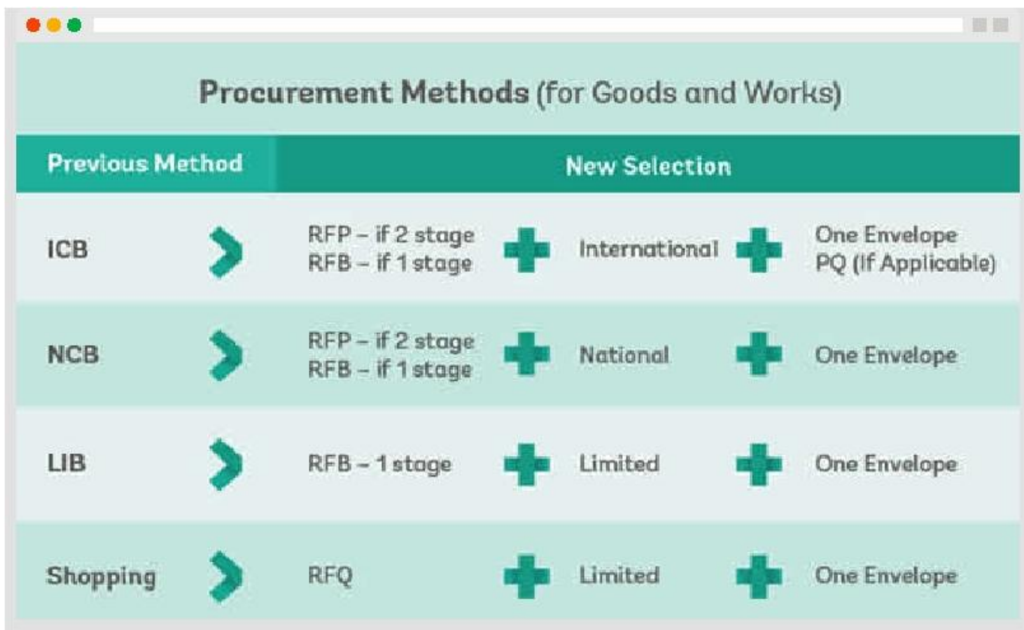


FIGURE 12: Procurement Method Mapping - Current Procurement Methods to New Procurement Framework

Click on the ***Procurement Method*** first level selection dropdown to select a procurement method. In this example, ***Request for Proposals*** is selected.

Select the ***Market Approach***. In this example, ***Open*** and ***National*** are selected.

Select the ***Procurement Process***. In this example, ***Single Stage - One Envelope*** is selected. In this example, the ***Evaluation Options*** are not used.

Key Features

Please find the currently used methods mapped into the new procurement framework
Also Refer 2.2.1 Creating a Procurement Plan - Activitty Details Screen - key Details

2.2.2 Creating a Procurement Plan - Activity Details screen - Related Details

After all the ***Key Details*** information is completed, click on ***Generate*** to automatically generate a Reference Number for this Activity under ***Related Details***.

Enter the location in the ***Location*** text field. The location is based on the nearest address

Enter the Estimated Amount value in the ***Estimated Amount (US$)*** text field.

Enter the percentage financed by the Bank in the ***Bank Financed %*** text field.

Select the ***Review Type***. In this example, ***Prior Review*** is selected. Prior and Post Review activities must be created into the Procurement Plan.

Click on the ***Description*** text field to enter the Activity description. This is the short description of the task (maximum 200 characters).

2.2.3 Creating a Procurement Plan - Activity Details screen - Component

Select the ***Component***, and the percentage per component. In this example, ***Project Management*** is selected, at 100%.

Select the percentage of financing for this Activity. In this example, the loan ***IDA-99999*** is the only loan for this Activity, and thus selected at 100% automatically. If multiple sources of financing are available, user can allocate different percentages (to make up 100%) or 100% just to one.

2.2.4 Creating a Procurement Plan - Activity Details screen – Procurement Classification

Under the ***Procurement Classification*** section, click the ***Select*** button to begin selecting the United Nations Standard Products and Services Code (UNSPSC) category codes (Figure 13).

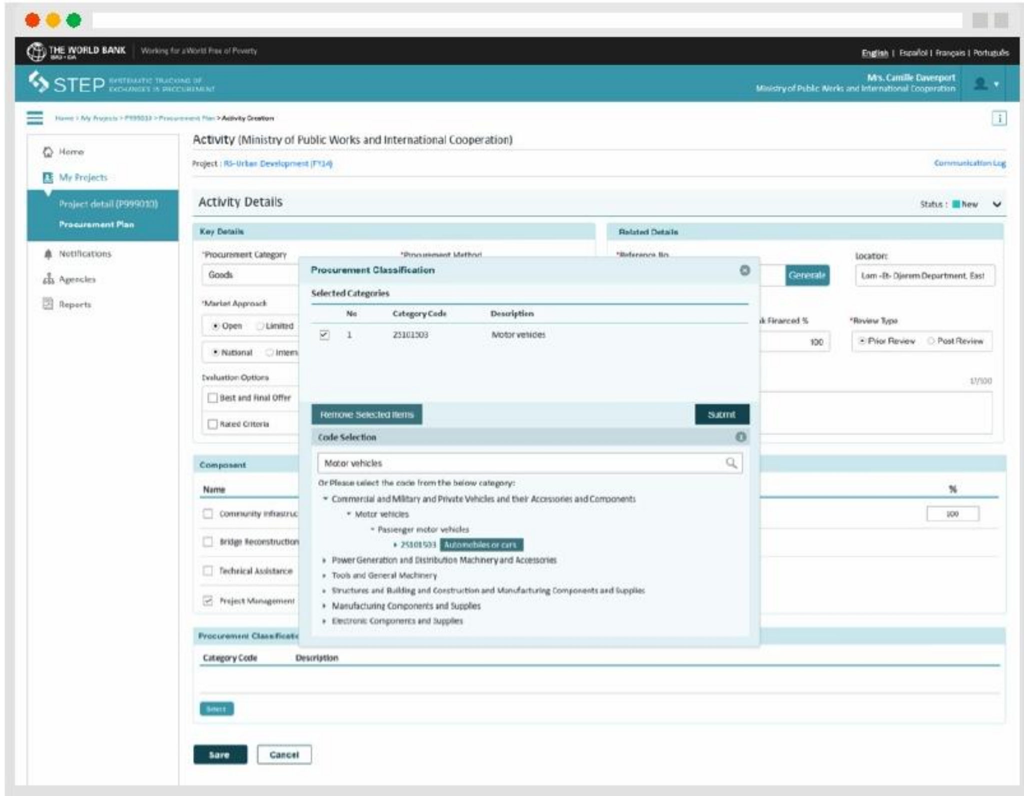


Figure 13: Selecting the UNSPSC details screen

After clicking the ***Select*** button, the ***Procurement Classification*** selection screen appears. Click on the ***Search on keyword/code*** text field to enter the search code. Search can be either text or numerical.

In this example, "Motor Vehicles" was entered into the ***Search on keyword/code*** text field. A further classification was "Passenger motor vehicles". On the ***Procurement Classification*** selection screen, click on the Category Code ***"25101503"*** to add the item to selected categories.

On the ***Procurement Classification*** selection screen, click on ***Submit*** to finish and validate the selection.

On the Activity creation screen, click on ***Save*** to validate and display the activity roadmap.

2.2.5 Creating a Procurement Plan - Activity Details screen – Procurement Roadmap

Functionality

The Roadmap section will be calculated and populated based on the first date that the user enters. Dates and days can be modify at anytime. The user needs to press *Save* at the end of the process.

At this point the Upper section is again display only (with Edit Button) and the roadmap section is editable to change the dates. When Upper section is editable, Roadmap section is hidden. When Roadmap section is editable, Upper section is display only and collapsed.

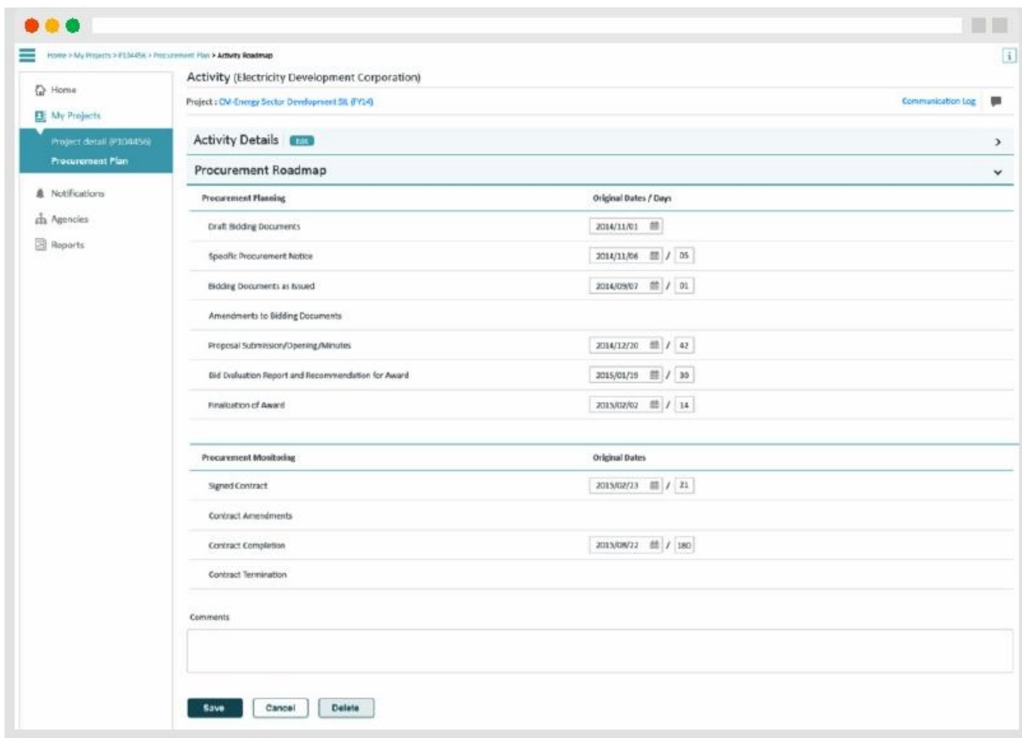


FIGURE 14: Procurement Roadmap

For previously cleared activities the original plan is frozen, and the user can edit the Revised Plan Dates/Days.

Once a user performs actions on a step, the Process Status is changed to ***Under Implementation*** and the ***Revised Plan Dates*** are frozen.

If the Review Type is ***Prior Review***, then only those steps without review will show the Actual date field open for entry. For Post review All Steps (except Amendment Steps, Termination Steps) will show Actual date field open for entry.

Click on the first ***Original Date*** field to enter the date for the ***Draft Bidding Document*** step, the first activity under ***Procurement Planning.*** All the other dates will be automatically calculated. Any of the dates or date intervals can be modified, and the remaining dates will be automatically updated.

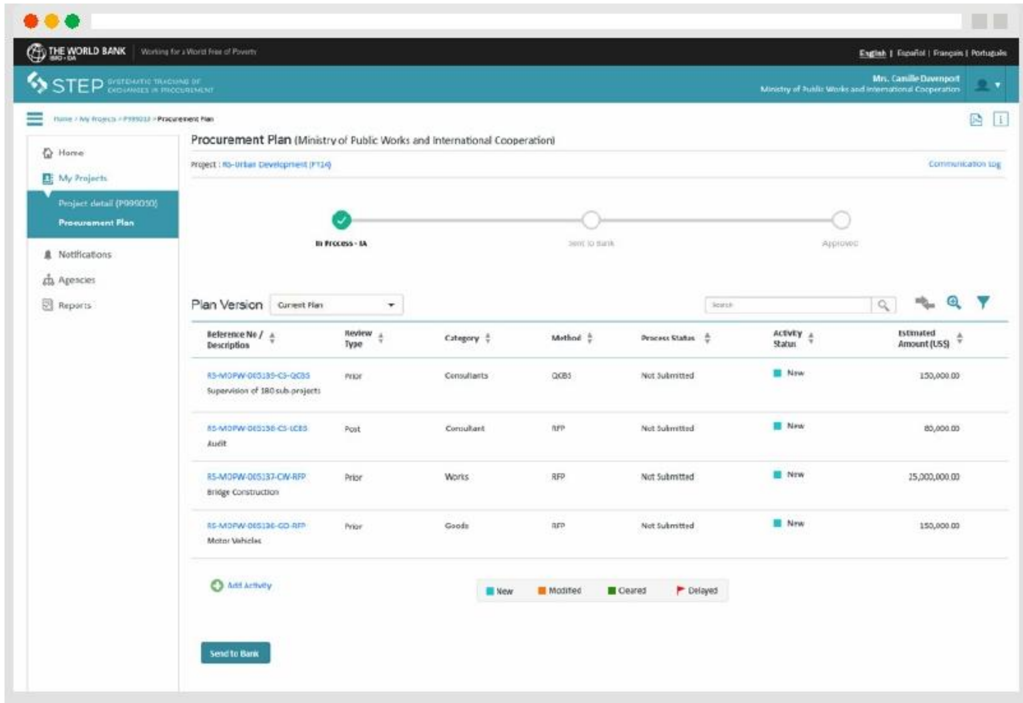


FIGURE 15: Completing Procurement Plan and Submitting to the Bank for No Objection

Click on ***Save*** to save the changes made to the Activity. On the ***Procurement Plan*** screen, click on ***Add Activity*** to create a new Activity for this procurement plan, and follow the same procedures for this new Activity.

Note: That prior and post review activities must be included into the Procurement Plan.

In this example, we added four activities to this Procurement Plan, as illustrated in Figure 15. Once all the Activities are added to the Procurement Plan, on the ***Procurement Plan*** screen, click on ***Send to Bank*** to request a review of the Procurement Plan by the Bank.

The ***Submit Procurement Plan to Bank*** screen now appears. Click on the ***Email Message*** field to enter the email body.

On the ***Submit Procurement Plan to Bank screen***, click on ***Send*** to submit the Procurement Plan to the Bank or ***Save as Draft*** to send it later .

After submitting the Procurement Plan, the confirmation appears. Click ***OK*** (Figure16).

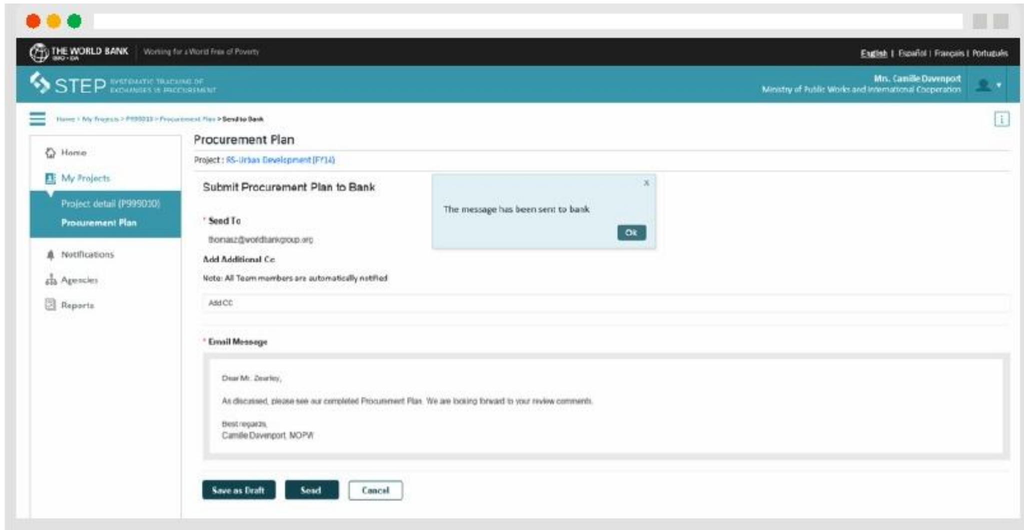


FIGURE 16: Sending Procurement Plan to the Bank For No Objection

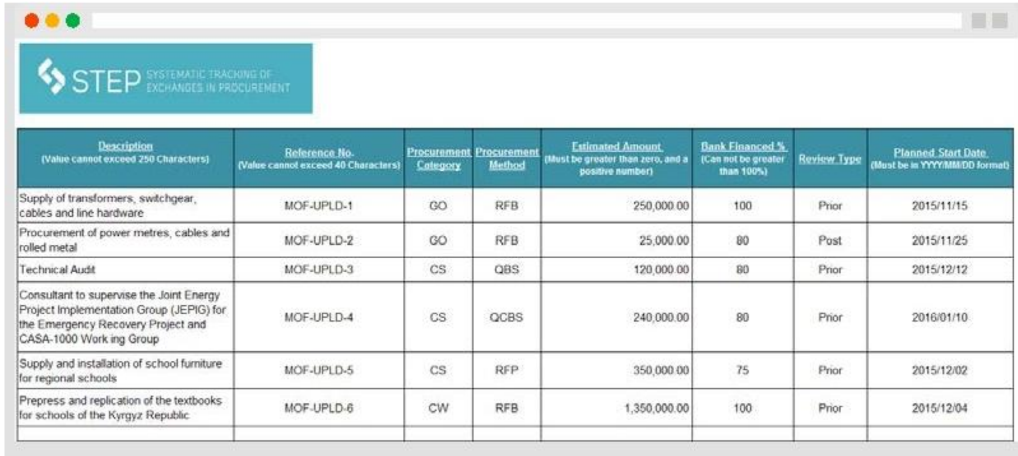
This completes the initial activities associated with submitting the Procurement Plan to the Bank for No Objection.

Procurement Plan activities can also be uploaded to STEP by uploading an Excel spreadsheet. These activities are described below.

2.2.6 Creating a Procurement Plan – Excel Upload

Client users have the option to upload a basic Procurement Plan, based on an Excel template with specific Activity. In order to do so, the Client user should request from the respective country STEP Focal Point, or the Procurement Specialist assigned to the project, the Excel template for upload.

The Excel template allows the Client to pre-load basic information on all prior and post review Activities (Figure 17).



Description (Value cannot exceed 250 Characters)	Reference No. (Value cannot exceed 40 Characters)	Procurement Category	Procurement Method	Estimated Amount (Must be greater than zero, and a positive number)	Bank Financed % (Can not be greater than 100%)	Review Type	Planned Start Date (Must be in YYYY/MM/DD format)
Supply of transformers, switchgear, cables and line hardware	MOF-UPLD-1	GO	RFB	250,000.00	100	Prior	2015/11/15
Procurement of power metres, cables and rolled metal	MOF-UPLD-2	GO	RFB	25,000.00	80	Post	2015/11/25
Technical Audit	MOF-UPLD-3	CS	QBS	120,000.00	80	Prior	2015/12/12
Consultant to supervise the Joint Energy Project Implementation Group (JEPIG) for the Emergency Recovery Project and CASA-1000 Work ing Group	MOF-UPLD-4	CS	QCBS	240,000.00	80	Prior	2016/01/10
Supply and installation of school furniture for regional schools	MOF-UPLD-5	CS	RFP	350,000.00	75	Prior	2015/12/02
Prepress and replication of the textbooks for schools of the Kyrgyz Republic	MOF-UPLD-6	CW	RFB	1,350,000.00	100	Prior	2015/12/04

FIGURE 17: STEP Excel Template

Key Features

Once the information has been loaded, the Client will have to complete other fields in STEP.

2.2.6.1 Uploading Activities from the Excel Template

Once the Client has entered the information into the Excel template, the Client will need to enter into STEP and access the projects. Under the ***Project Detail*** section, click on ***Procurement Plan***, and then click ***Upload New Activities from Excel File*** at the bottom of the screen (Figure 18).

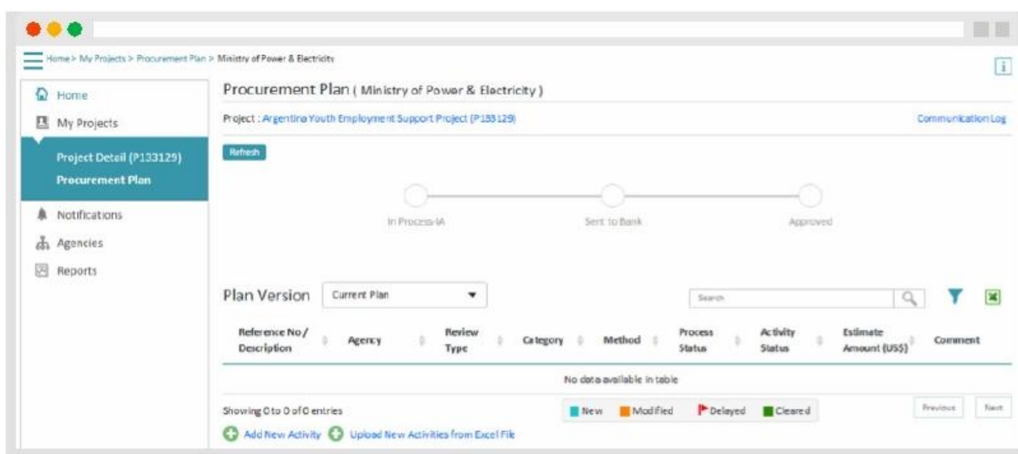


FIGURE 18: Uploading Procurement Plan Activities via Excel

The user will then be directed to the upload functionality of STEP. Press the ***Browse*** button in order to load the information from the user's system, and then press ***Upload*** (Figure 19).

FIGURE 19: Upload Procurement Plan Excel template from user's system

Key Features

The Excel template must be saved in either a .XLS or .XLSX file format. Do not make any changes to the Excel template, as the uploaded file format must be **EXACTLY** the same as the template. Any changes to the template will result in errors, and the inability of STEP to upload the file properly.

As the file is being loaded, STEP will show a message "Excel Upload in Progress" below the upload status bar. After uploading, press the ***Refresh*** button.
Once the Excel file has been uploaded, the message appears "***Excel Upload has been successful. CLICK HERE to validate the uploaded data***". Click on the ***CLICK HERE*** in the message to access the uploaded data.

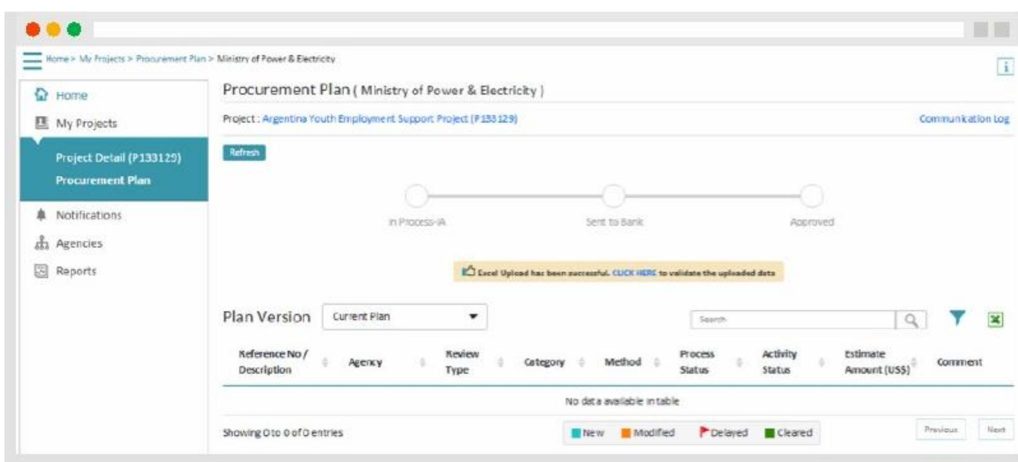


FIGURE 20: Successful upload of Excel template into STEP

2.2.6.2 Validation of activities to be loaded into STEP

After uploading the Excel file, STEP will indicate under the ***Upload Status*** column Activities as ***Validated***, or as an ***Error***. If the Activities were not properly uploaded, the user can attempt to correct the information in Excel, and attempting to once again upload the file into STEP as previously described.

Once the system shows all Activities as ***Validated***, the user can add the information into STEP by clicking the ***Add Verified Records to Plan*** button (Figure 21).

FIGURE 21: Procurement Plan screen to validate upload

Clients will have access in STEP to the Activities that have been uploaded by using the Excel Template. These Activities will have a ***Process Status*** of ***Incomplete***. Therefore, Clients must access each Activity in STEP complete all missing fields (Figure 22).

Once all Activities have been completed, the ***Process Status*** will be changed automatically to ***Not Submitted***, and the ***Activity Status*** will be appear as ***New***.

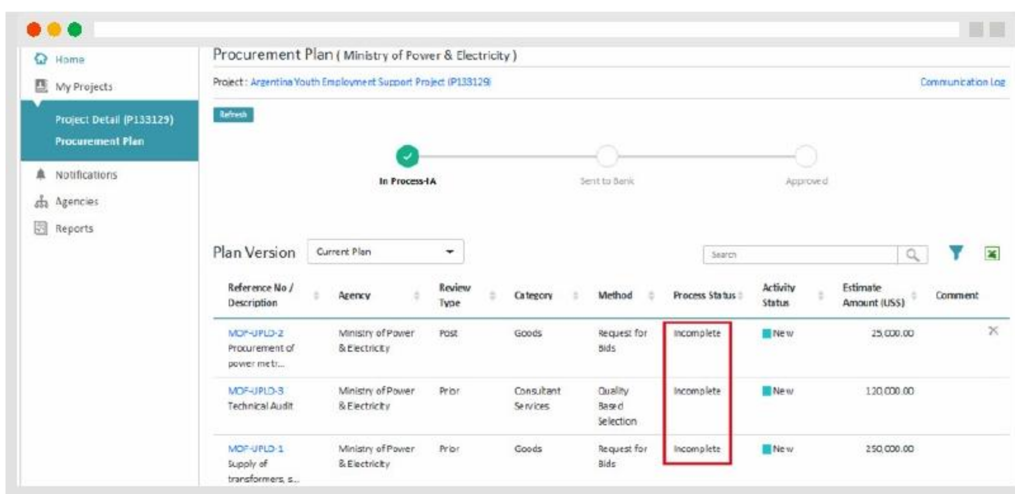


FIGURE 22: Procurement Plan screen showing uploaded activity status

2.3 Creating a Procurement Plan - Client Responds to Bank No Objection

On the *Project Details* screen, click on *Procurement Plan Response Issued with Comments* notification to display the message sent by the TTL; the message will indicate which activities need revision (Figure 23).

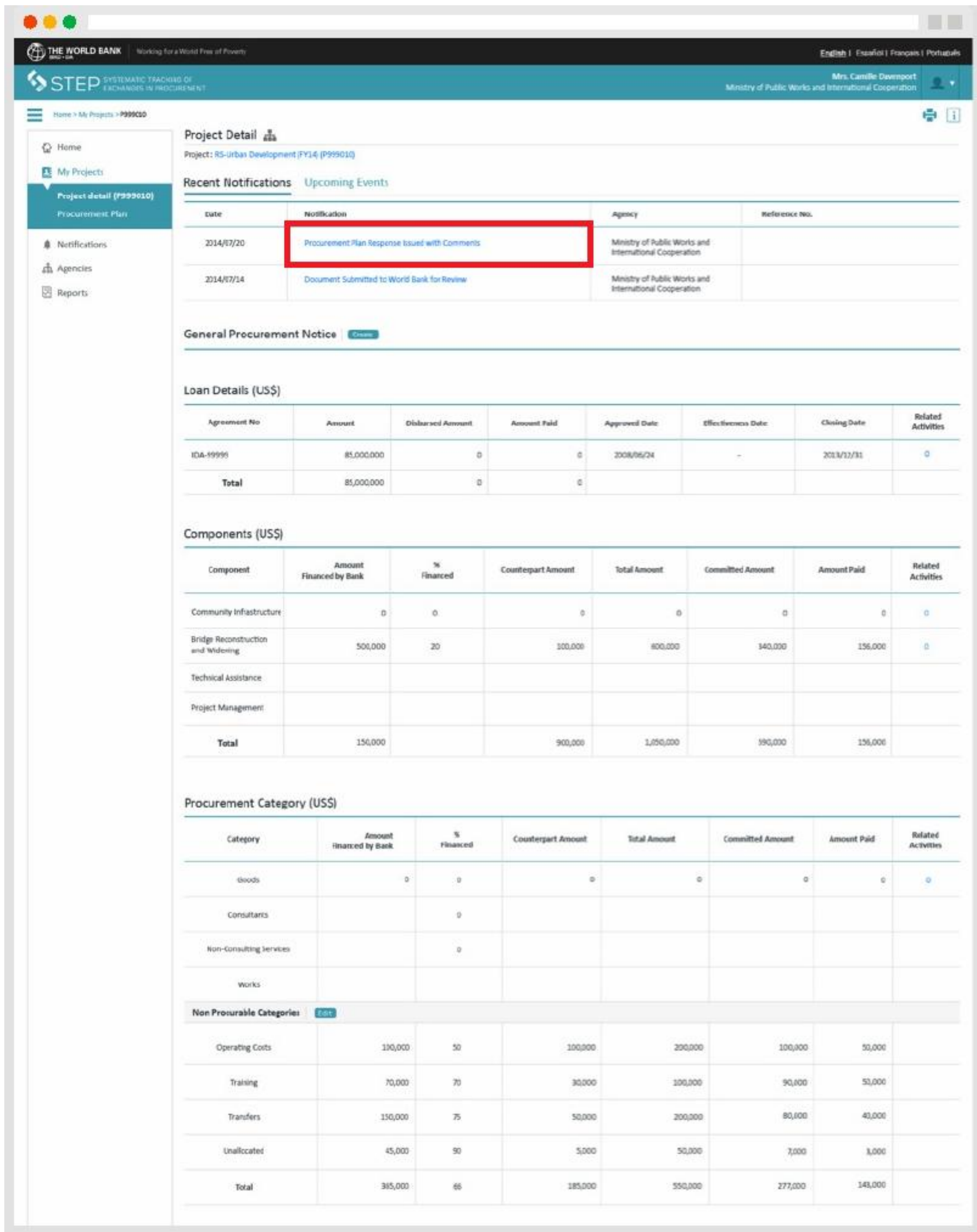


FIGURE 23: Procurement Plan - Client responds to Bank's No Objection

The ***Communications Log*** now appears with the TTL's message. Click ***Procurement Plan*** after reading the specific comments by the TTL's No Objection response, and to display the Activities included in this Procurement Plan.

In this example, the TTL's No Objection response cleared 3 of the 4 activities in this Procurement Plan. Click on the ***Comments*** icon for the Activity ***RS-MOPW-005136-GO-RFP*** to see the comments entered by the TTL for the Activity.

The comments entered by the TTL for the specific Activity ***(RS- MOPW-005136-GO-RFP)*** are now displayed, and provide the necessary information to make edits to the Activity so it can be Cleared. Click on the Reference No. ***RS-MOPW-005136- GO-RFP***, to display the Activity screen and all the related details, and to also make the edits to the Activity (Figure 24).

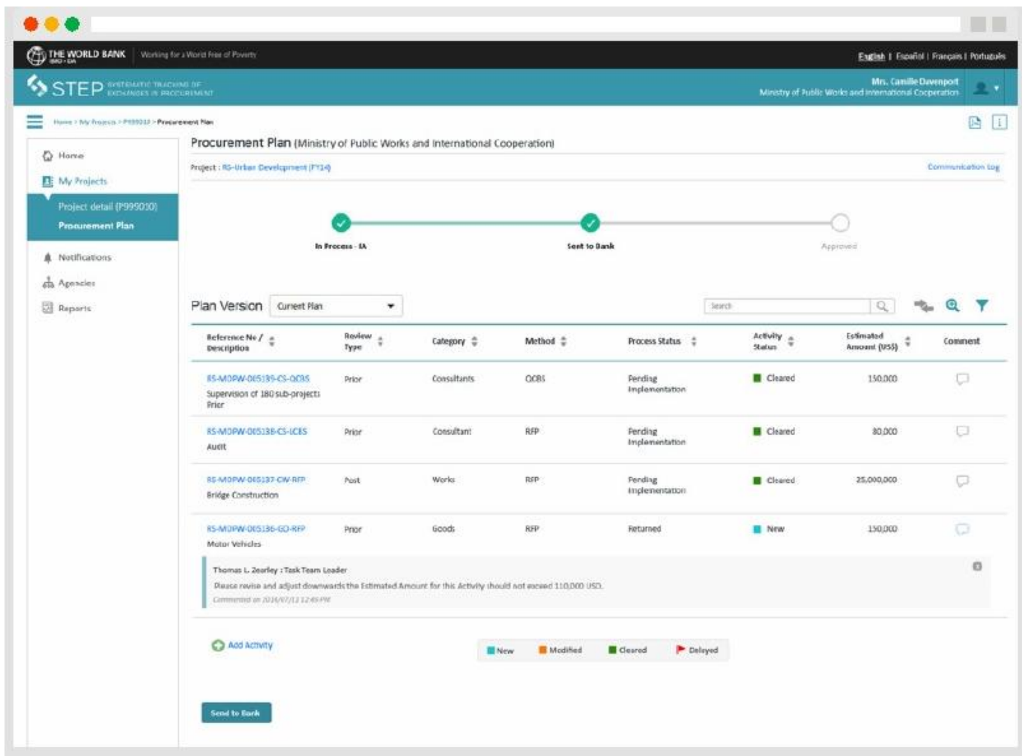


FIGURE 24: Procurement Plan - Editing Activity in response to Bank's No Objection

On the Activity Details screen, click on ***Edit*** to modify the Activity Details.

On the Activity Details screen, click on the ***Estimated Amount (US$)*** field to edit the entered number, based on the TTL's comments for the Activity.

Click on the ***Save*** button to validate the changes entered to the Activity Details.

Key Features

Remember that every time you open an Activity, you need to save both the Activity Details and the Procurement Roadmap.

Click on ***Save*** to validate the ***Procurement Roadmap***, or make changes once edited. Click ***Save*** after making any edits. (Figure 25)

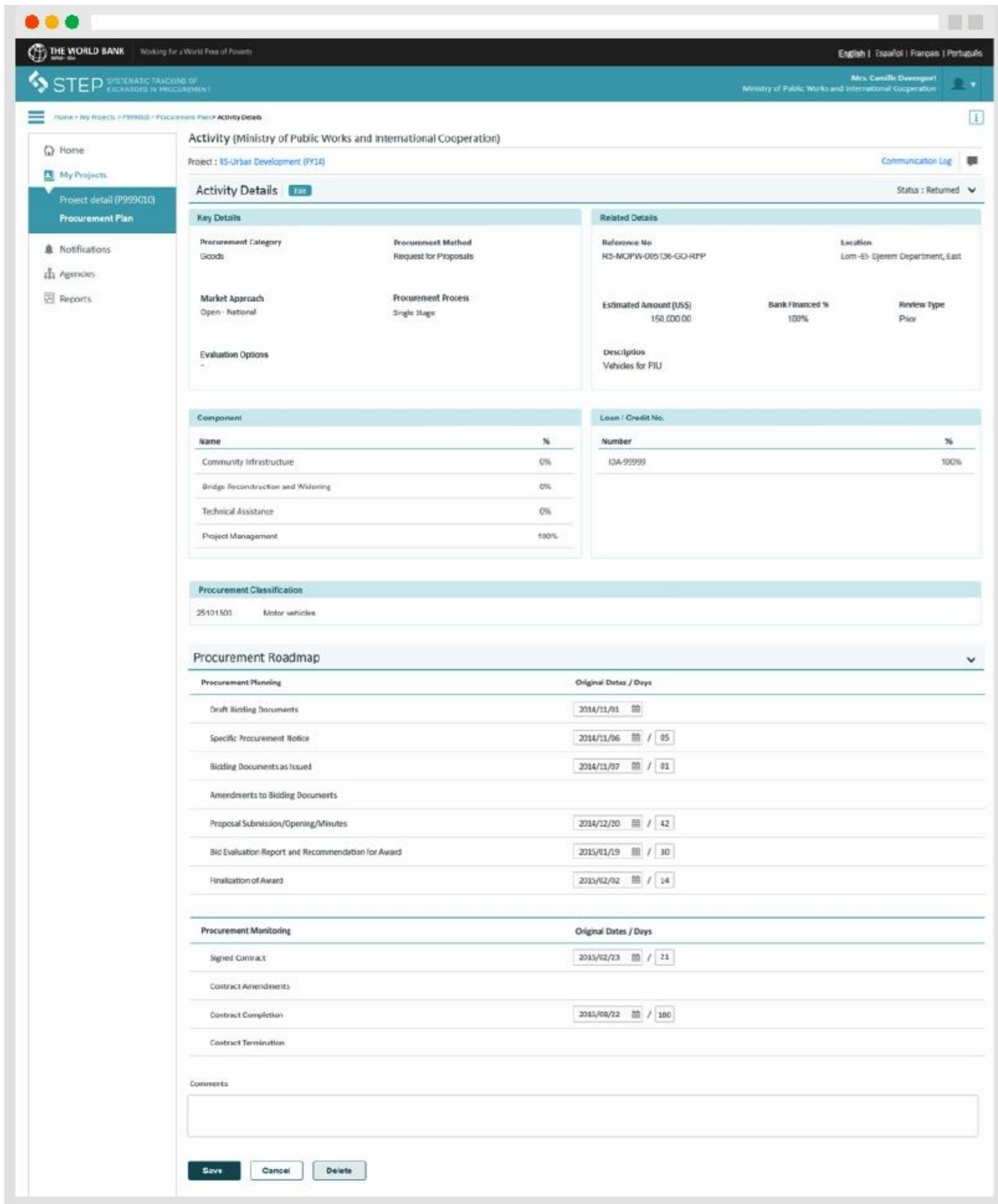


FIGURE 25: Procurement Plan - Client edits Activity in response to Bank's No Objection

Now that the Activity has been edited, it will appear as ***Modified*** on the ***Procurement Plan*** screen. Click on ***Send to Bank*** to request another review of the Procurement Plan by the Bank (Figure 26).

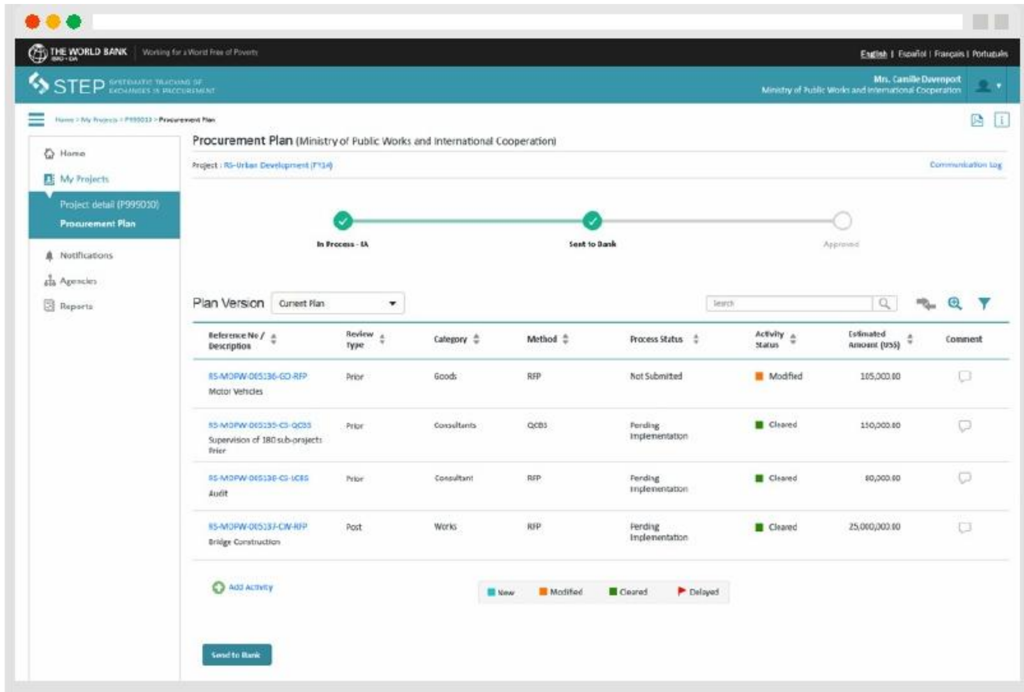


FIGURE 26: Procurement Plan - Editing Activity in response to Bank's No Objection

Enter the email body on the Email Message field. Click on ***Send*** to send the Procurement Plan to the Bank.

On the ***Submit Procurement Plan to Bank*** screen, click ***OK*** to confirm (Figure 27).

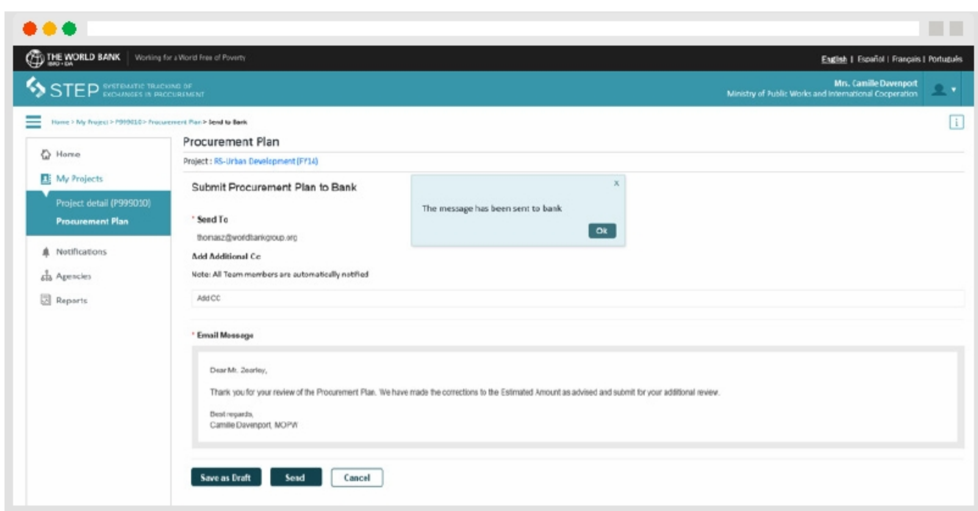


FIGURE 27: Procurement Plan - Client sends modified Activity to Bank for No Objection

2.4 Procurement Plan - Bank Clears Activities - Sends No Objection to Client

The final No Objection and Clearance is illustrated to close the No Objection review process for the Bank, and allow the Client to move forward in the procurement process (Figure 28)

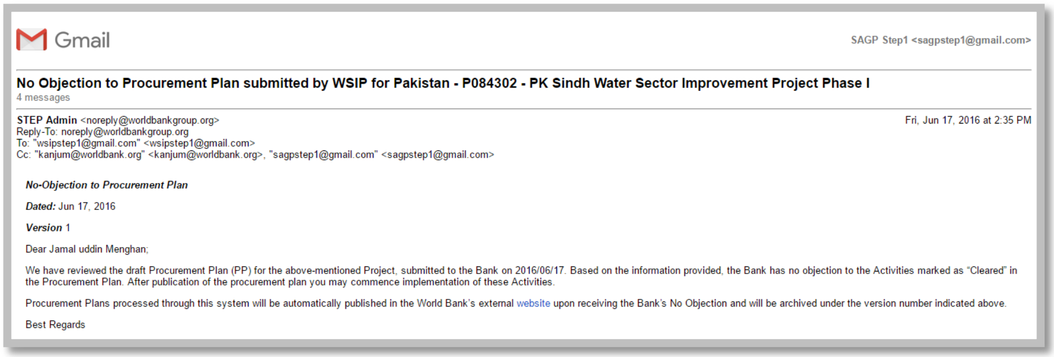


Figure 28 Bank's NO Objection on Procurement Plan Activities

2.5 Create a General Procurement Notice - Create the General Procurement Notice and Send to the Bank for No Objection

After receiving a No Objection, the Client will notice that Activities in the Procurement Plan have been approved. On the Project Details screen, click on ***Create*** in the ***General Procurement Notice*** section to add a GPN to this project.

On the ***GPN creation*** screen, click on the ***Select Language*** dropdown to select a language.

Click on the ***Notice Text*** field to fill in the full official text of the Notice.

Click on ***Save as Draft & Send to Bank*** to send the GPN for No Objection (Figure 29).

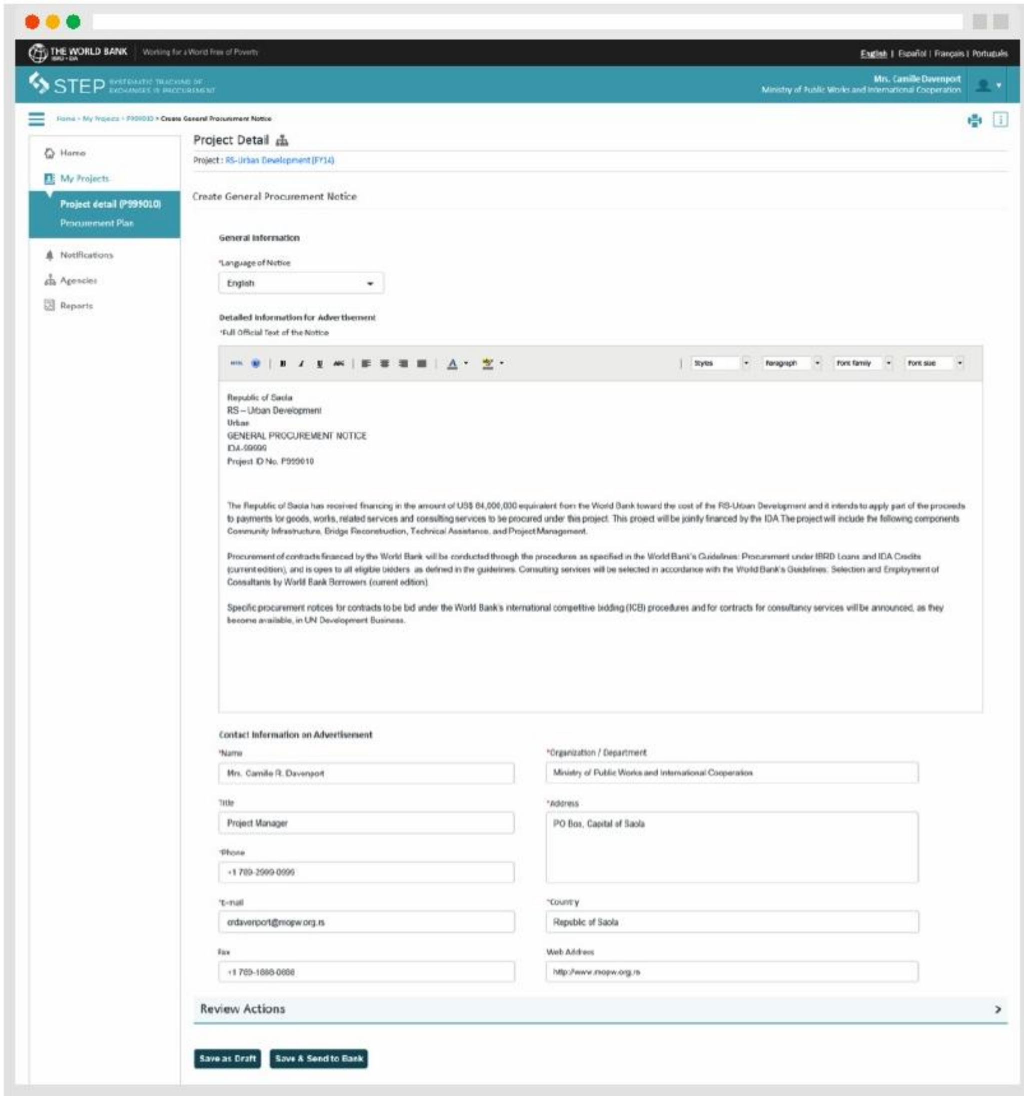


FIGURE 29: Client sends GPN to bank for No Objection

2.5.1 Create a General Procurement Notice - Final Client Activities

In this example, the Bank has approved the GPN with No Objection. On the ***Procurement Plan*** screen, the ***Procurement Roadmap*** shows that the GPN has been approved, after review by the Bank. The Procurement Plan is now ready for Procurement Tracking (Figure 30).

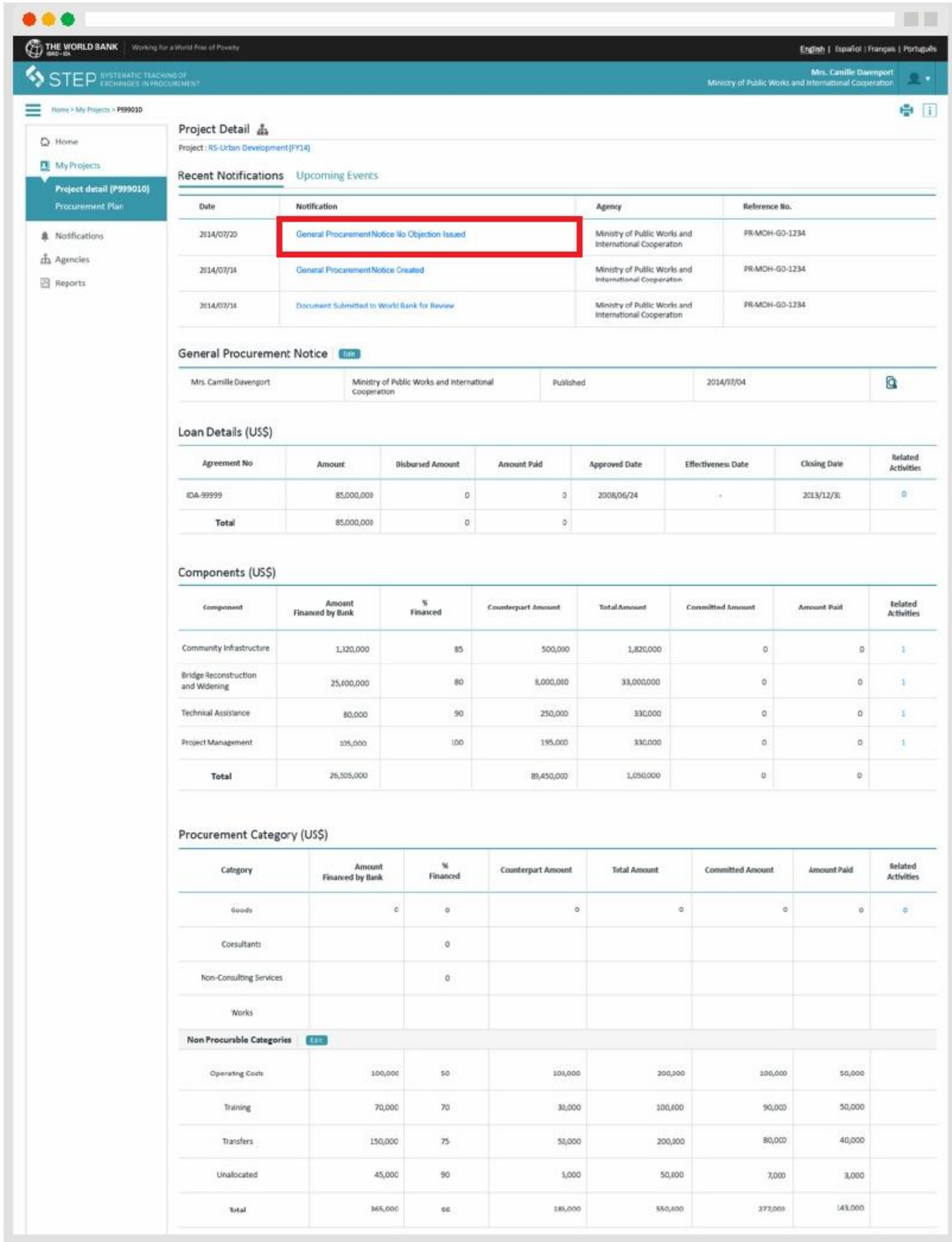


FIGURE 30: Client receives No Objection response from Bank

Key Features

Just like with the Procurement Plan activities, the Client would need to make the recommended changes to the GPN in the event the GPN was not approved, and resend to the Bank for No Objection.

3

Step Functionality - Procurement Plan

3.1 Project Dashboard

Upon logging into STEP, the Client is taken to the ***Project Dashboard*** page.

The ***Project Dashboard*** is the Client's central point of reference and information for the project portfolio related to the user.

The ***Project Dashboard*** screen will be the client entry point to the system after login. The dashboard includes summary information related to the project(s) and procurement activities associated with the agency of the user. The user will be able to view all project details for the Implementing Agency to which his account is linked. Figure 31 shows the ***Project Dashboard*** screen.

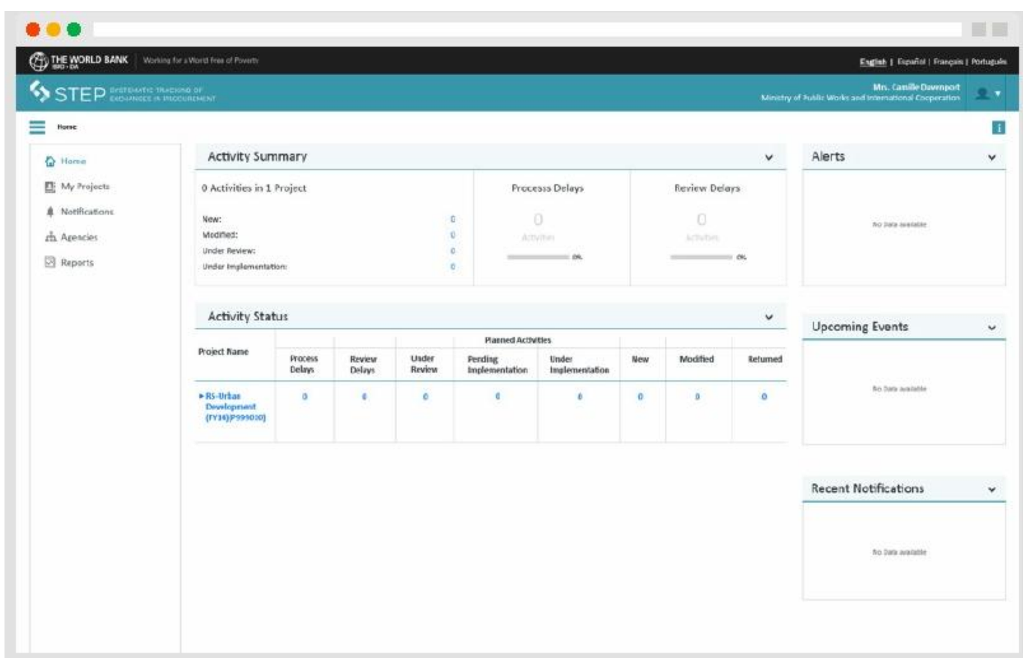


FIGURE 31: Project Dashboard

The screen is divided into sections (Activities Summary, Activities Status, Alerts, Upcoming Events and Recent Notifications) for easy access to important information. In addition, it has a navigation section and breadcrumb section for navigating through the system. Each section of the screen will be described in the details of Section 3.1.

Navigation Menu

Since this is the home page for the application, the navigation menu in the top left corner appears with just ***Home***. Clicking on this attribute takes the user back to the ***Home*** page (Project Dashboard).

Left Navigation

The left navigation is shown below in Figure 32.

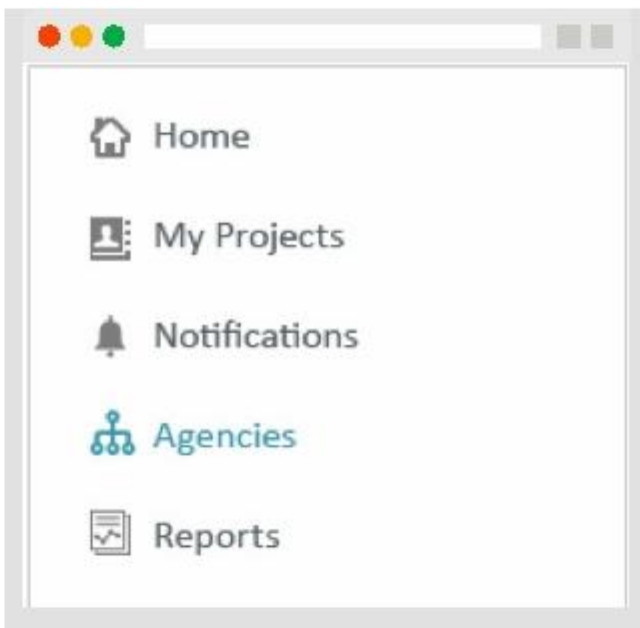


FIGURE 32: Project Dashboard - Left navigation

Functionality

This section of the screen allows users to navigate to different sections of the application.

The ***Home*** selection takes the user back to the ***Dashboard*** page from any screen in the application.

My Projects displays a complete listing of all projects appearing in the Activities Status table. These will only be the projects that are related to the user.

Notifications displays a page of all notifications received within the last 2 weeks.

Agencies will show the Agency structure setup for the project.

Reports will identify Client specific reports when defined in the system.

3.2 Creating a Procurement Plan - Activities Summary Section

The Activities Summary section is shown below in Figure 33

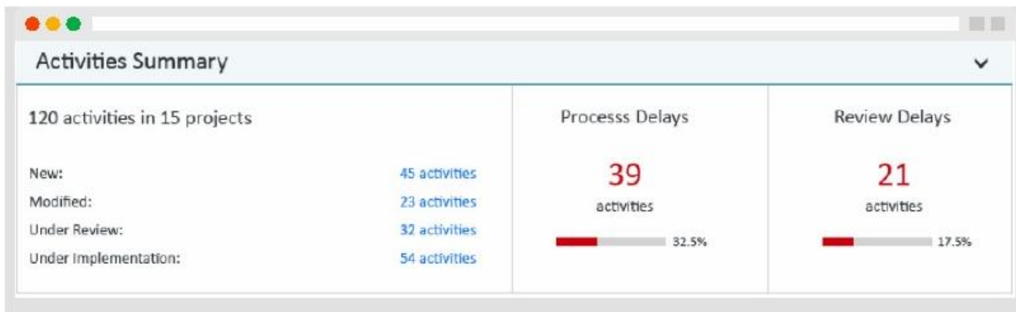


FIGURE 33: Project Dashboard - Activities Summary

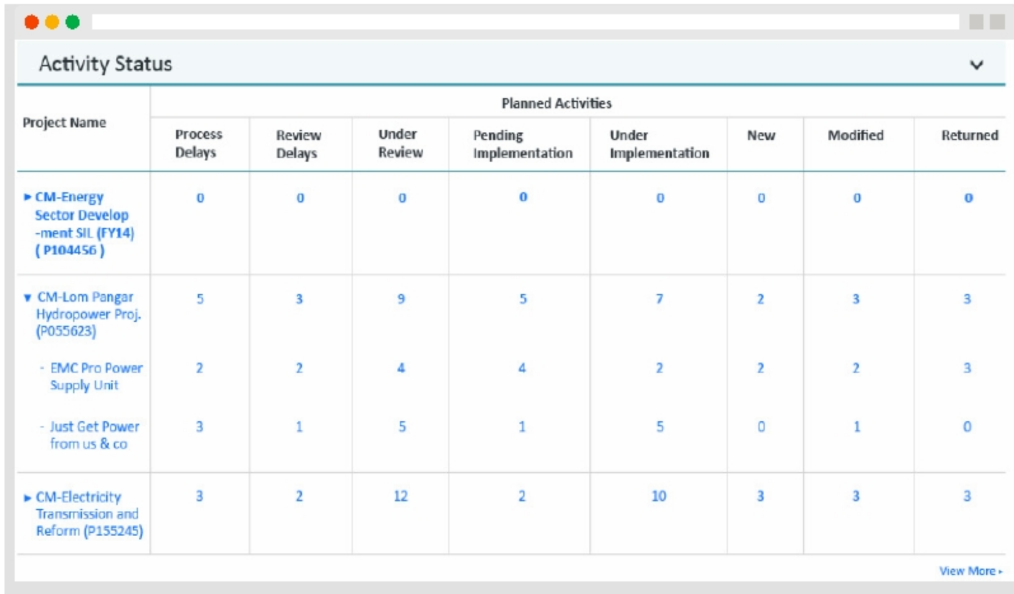
This section contains cross cutting data across all the projects listed for the Agency of the user. The following rules define the criteria for each displayed attribute.

Attribute	Role
# of activities in # projects	The count of activities will show the number of activities for the projects listed where the agency has access. This is defined by the role the agency plays within each project. If the Agency is a PIU to a project, then the count of activities from that project will be from all activities on the project regardless of which agency they relate to. If the agency is an IA for the project, then the count of activities for that project will only be for those activities, which are linked to the displayed agency. The count of activities for the display will be the sum of all project activity counts. The count of projects will count each project with which the agency is associated, regardless if it is a PIU or an IA association.
New	This will use the same count approach as the count of activities above, but will only count those activities where the Activity Status is "New".
Modified	This will use the same count approach as the count of activities above, but will only count those activities where the Activity

	Status is "Modified".
Under Review	This will use the same count approach as the count of activities above, but will only count those activities where the Activity Process Status is "Under Review".
Under Implementation	This will use the same count approach as the count of activities above, but will only count those activities where the Activity Process Status is "Under Implementation".
Process Delays	This will use the same count approach as the count of activities above, but will only count those activities where the Activity Process Status is "Under Implementation" or "Pending Implementation" by the Client which are delayed with respect to the expected procurement plan dates For Pending Implementation activities a process delay occurs if the Revised Plan Date for the first step has already past. For "Under Implementation" for the Next Process Step of an activity, the next step after the last completed step (a completed step is either marked as completed/approved/no objected or has an Actual Date for the step) has a Revised Plan Date that is in the past, the activity is counted as Delayed. The percentage for this attribute is calculated against the count of activities Pending Implementation, Under Review, and Under Implementation from the list of projects in the Activity Status table.
Review Delays	This will use the same count approach as the count of activities above, but will only count those activities where the Activity Process Status is "Under Review" by the Bank has gone beyond the "service standard" If the current Document Submission is under review for a Step in an activity, then for the step that is under review will need to be calculated whether or not there is a review delay. The review delay calculation is based on the Review Level for the activity, and based on the time period between when the Document Submission was made to the Bank from the Client and The Bank's Interim Response or No Objection. If there is a submission from the Client without a review response from the Bank and the number of days are beyond the standard, then the activity (and step) are counted as delayed. The business standards for each review level is: APS Review - 7 days APM Review - 17 days OPRC Review - 17 days The percentage for this attribute is counted against the count of activities Under Review form the list of projects in the Activity Status table.

3.3 Creating a Procurement Plan - Project Dashboard - Activities Status Section

The Activities Summary section is shown below in Figure 34.


Activity Status

Project Name	Planned Activities							
	Process Delays	Review Delays	Under Review	Pending Implementation	Under Implementation	New	Modified	Returned
▸ CM-Energy Sector Develop -ment SIL (FY14) (P104456)	0	0	0	0	0	0	0	0
▾ CM-Lom Pangar Hydropower Proj. (P055623)	5	3	9	5	7	2	3	3
- EMC Pro Power Supply Unit	2	2	4	4	2	2	2	3
- Just Get Power from us & co	3	1	5	1	5	0	1	0
▸ CM-Electricity Transmission and Reform (P155245)	3	2	12	2	10	3	3	3

View More ▸

FIGURE 34: Project Dashboard - Activities Status

The Activity Status section shows a table of Planned Activity columns across Projects and other Sub Projects tied to the Agencies (if applicable). This data gives a status of projects and activities. The following section defines the data to be used in the display.

Functionality

The first 5 projects will appear in the display. To see more projects and column data click the ***View More*** link which will take you to the ***My Projects*** page described in Section A.

Sort Order

The list of projects is sorted by the projects having the most recent activity (created/modified activities, updated agencies, attached documents, etc.).

Functionality

Projects with the most recent change, whether made by Bank or Client appears at the top of the list of projects. Inactive projects would fall to the bottom of the list.

Project Name Column

The Project Name column contains two different sets of information against which the activity count columns are calculated. The top-level data is the Project information. This column will show the <Project Name> (<Project ID>) values for each project listed. If the Agency is a PIU of any of the projects, then the Agency will have access to view data from each agency associated to the project.

In these instances the project information appears with a twisty, and the Name of Each IA appears below it. If the Agency name can be displayed in Roman characters, then the name appears in that language. Otherwise, the name appears in English.

If the agency is not PIU of the project, then there will not be a twisty next to the Project. The Agency Procurement Plan data used for the display is the Agency of the user only.

Project Planned Activities Columns

The counts appearing under the Planned Activities header are counts related to specific attributes of the activities (as indicated in the sub-headers). The count at the Project level will be a sum of the Agency counts. The count at the Agency level will be the total for the Agency for the specific project.

If the Agency is a PIU to a project, then the count of activities from that project will be from all activities on the project regardless of which agency they relate to.

If the agency is an IA for the project, then the count of activities for that project will be for the activities that are linked to the displayed Agency.

Column	Rule
Process Delays	This will use the same count approach, but will only count those activities where the Activity Process Status is "Under Implementation" or "Pending Implementation" by the Client. For Pending Implementation activities a process delay is if the Revised Plan Date for the first step has already past. For "Under Implementation" for the Next Process Step of an activity, the next step after the last completed step (a completed step is either marked as completed/approved/no objected or has an Actual Date for the step) has a Revised Plan Date that is in the past, the activity is counted as Delayed. The percentage for this attribute is calculated against the count of activities Pending Implementation, Under Review, and Under Implementation from the list of projects in the Activity Status table.
Review Delays	This will use the same count approach, but will only count those activities where the Activity Process Status is "Under Review". If the current Document Submission is under review for a Step in an activity, then for the step that is under review will need to be calculated whether or not there is a review delay by the Bank.

	The review delay calculation is based on the Review Level for the activity, and based on the time period between when the Document Submission was made to the Bank from the Client and The Bank's Interim Response or No Objection. If there is a submission from the Client without a review response from the Bank and the number of days are beyond the standard, then the activity (and step) are counted as delayed. The business standards for each review level is: APS Review - 7 days APM Review - 17 days OPRC Review - 17 days The percentage for this attribute is counted against the count of activities Under Review form the list of projects in the Activity Status table.

The table below defines the rules for calculating the count value that appears in each column. All counts are based on the current Procurement Plan data.

This table of columns is a subset of the columns appearing in the My Projects display. Due to space on the screen only the most vital columns are displayed.

Column	Rule
Under Review	This will use the same count approach, but will only count those activities where the Activity Process Status is "Under Review". Project level display will sum agency level display values. Agency Level will be for each agency the user's agency has access to the procurement plan.
Pending Implementation	This will use the same count approach, but will only count those activities where the Activity Process Status is "Pending Implementation". Project level display will sum agency level display values. Agency Level will be for each agency the user's agency has access to the procurement plan.
Under Implementation	This will use the same count approach, but will only count those activities where the Activity Process Status is "Under Implementation". Project level display will sum agency level display values. Agency Level will be for each agency the user's agency has access to the procurement plan.
New	This will use the same count approach, but will only count those activities where the Activity Status is "New".

	Project level display will sum agency level display values. Agency Level will be for each agency the user's agency has access to the procurement plan.
Modified	This will use the same count approach, but will only count those activities where the Activity Status is "Modified". Project level display will sum agency level display values. Agency Level will be for each agency the user's agency has access to the procurement plan.
Returned	This will use the same count approach, but will only count those activities where the Activity Status is "Returned". Project level display will sum agency level display values. Agency Level will be for each agency the user's agency has access to the procurement plan.

Link Functionality

Most of the data appearing in the Activities Status table are links. The following table describes what will occur when the link is clicked.

Link	Rule
Project Name (ID)	When clicked, this link calls the Project Details Page for the selected Project ID.
Implementing Agency Name	When clicked, this link calls the Procurement Plan page for the Agency clicked. The Left Navigation under "My Projects" displays appropriately based on the plan displayed.
Process Delays	When clicked, this link calls the Procurement Plan page and displays all activities in the plan where there is a process delay (see above for Process Delay rule). If the Agency for the User is the PIU for the Project, then the plan that is displayed is the All Plan view. If the Agency for the User is an IA, then the plan displayed will be the individual IA plan for the user's agency.
Review Delays	When clicked, this link calls the Procurement Plan page and displays all activities in the plan where there is a review delay (see above for Review Delay rule). If the Agency for the User is the PIU for the Project, then the plan displayed will be the All Plan view. If the Agency for the User is an IA, then the plan displayed will be the individual IA plan for the user's agency.
Under Review	When clicked, these links calls the Procurement Plan page and display all activities in the plan where the Process Status is "Under Review". If the Agency for the User is the PIU for the Project, then the plan that is displayed will be the All Plan view. If the Agency for the User is an IA, then the plan displayed will be the individual IA plan for the user's agency.

Pending Implementation	When clicked, this link will call the Procurement Plan page and display all activities in the plan where the Process Status is "Pending Implementation". If the Agency for the User is the PIU for the Project, then the plan that is displayed will be the All Plan view. If the Agency for the User is an IA, then the plan displayed will be the individual IA plan for the user's agency.
Under Implementation	When clicked, this link calls the Procurement Plan page and displays all activities in the plan where the Process Status is "Under Implementation". If the Agency for the User is the PIU for the Project then the plan that is displayed is the All Plan view. If the Agency for the User is a IA then the plan that is displayed is the individual IA plan for the user's agency.
New	When clicked this link calls the Procurement Plan page and display all activities in the plan where the Activity Status is "New". If the Agency for the User is the PIU for the Project then the plan that is displayed is the All Plan view. If the Agency for the User is a IA then the plan that is displayed is the individual IA plan for the user's agency.
Modified	When clicked this link calls the Procurement Plan page and display all activities in the plan where the Activity Status is "Modified". If the Agency for the User is the PIU for the Project then the plan that is displayed is the All Plan view. If the Agency for the User is a IA then the plan that is displayed is the individual IA plan for the user's agency.
Returned	When clicked this link calls the Procurement Plan page and display all activities in the plan where the Activity Status is "Returned". If the Agency for the User is the PIU for the Project then the plan that is displayed is the All Plan view. If the Agency for the User is a IA then the plan that is displayed is the individual IA plan for the user's agency.
View More	The View More link will open the My Projects Page display where the user can view all projects associated to the Agency. This is described in section A below.

3.4 Creating a Procurement Plan - Project Dashboard - Alerts Section

The alerts section will display alert information related to the Agency of the user. Alerts will identify upcoming events or overdue actions required by the agency. Alerts will be generated for the following:

- Starting 2 days before activity step is due;
- Starting the day after activity step is past due;
- Each day until the review is cancelled or responded; and
- Procurement Plan submission alert.

Clicking on the Activity Reference Number link will take the user directly to the activity where the alert was generated. If the user is from the Agency that is the PIU of the project, then the Alerts section will show all alerts for all agencies for the projects where the agency is the PIU. For Projects where the agency is not the PIU, only alerts related to that agency will be generated (Figure 35)

FIGURE 35: Project Dashboard – Alerts

If Due in "X" Days:

<Reference No/Plan> due in <X> days (<due Date>)

If Due Today:

<Reference No/Plan> due Today

Past Due Events:

<Reference No/Plan> overdue <X> days (<Due Date>)

The Reference Number appears as a link to the ***Activity Details Page***. The text and date appear in color based on the following:

- Due in X number of days, the alert is green;
- Due today, the alert is yellow;
- Past due, alert is red.

Calculating Activity Level Alerts

Activity alerts are calculated on Approved (Cleared) activities that have a process status of "Pending Implementation" or "Under Implementation". The alert will be calculated based on the Revised Plan dates for the steps in the activity.

For "Pending Implementation" the calculation will be based on the first activity step.

Once the date is within 2 days of the current date (based on based on Eastern Time Zone UTC-05:00) then the alert for the activity appears.

The alert continues to appear in the alerts list until the action for the step is "Under Review", "Approved" or "No Objection".

Key Features

When the Client starts an action on the step, it will change to be Under Implementation, so this will clear it from having the alert.

For "Under Implementation" for the next process step of an activity, the next step after the last completed step (a completed step is either marked as completed/approved/no objected or has an Actual Date for the step) has a Revised Plan Date that is within 2 days of the current date (based on Eastern Time Zone UTC-05:00) then the alert for the activity appears.

If the status for the step is "Under Review", or "Returned" and subsequently "Approved" or "No Objection", then the alert would not occur for the activity anymore.

Clicking on the ***View More*** expands the list of alerts displayed to show up to 20 alerts. There is also ***View Less*** link or Icon available to close the expansion of the section.

3.5 Creating a Procurement Plan - Project Dashboard – Upcoming Events

The Upcoming Events Section is shown below in Figure 36.

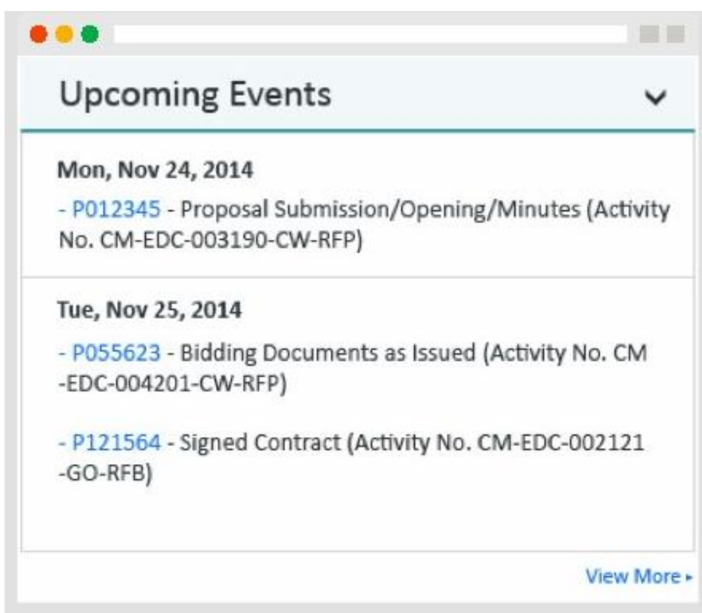


FIGURE 36: Project Dashboard - Upcoming Events

The ***Upcoming Events*** section lists upcoming activities that are due within the next 2 weeks. The Project ID is displayed as a link, and when clicked, it will open the ***Activity Detail*** Screen for the selected activity.

3.6 Creating a Procurement Plan - Project Dashboard – Recent Notifications Section

The ***Recent Notifications*** section is shown below in Figure 37.

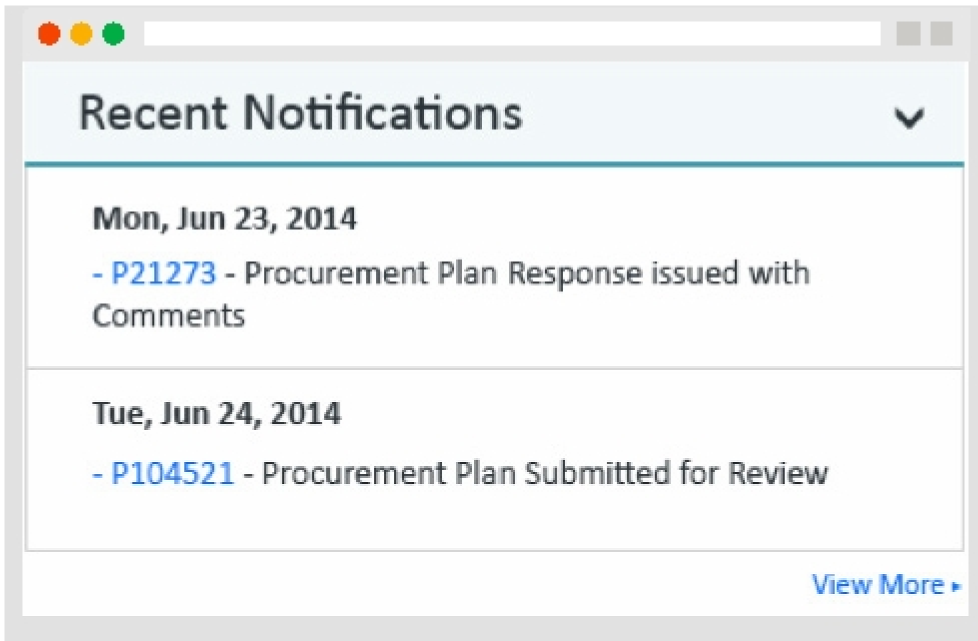


FIGURE 37: Project Dashboard – Recent Notifications

The ***Recent Notifications*** section lists communications that have been sent between the Bank/Client or System/Client. The notifications are for Plan submissions and reviews, Document submissions and reviews, Notice submissions and reviews, and for system notifications to the Agency users.

The notifications also refer to email notifications documents. In the display, the notification itself appears as a link rather than the Project ID. The link will open the notification in the communication log screen, or if related to an activity step, it will open the step screen and notification communication in the ***Review Actions*** section.

3.7 Creating a Procurement Plan - Project Dashboard – My Projects Screen Functionality

The My Projects screen shown below in Figure 38 is called by clicking on the "My Projects" Navigation link or by clicking on the "View More" option from the Activity

Status/My Projects section of the dashboard page. The page shows the same details as displayed in the Activity Status/My Projects section with the ability to scroll through all the projects associated to the Agency.

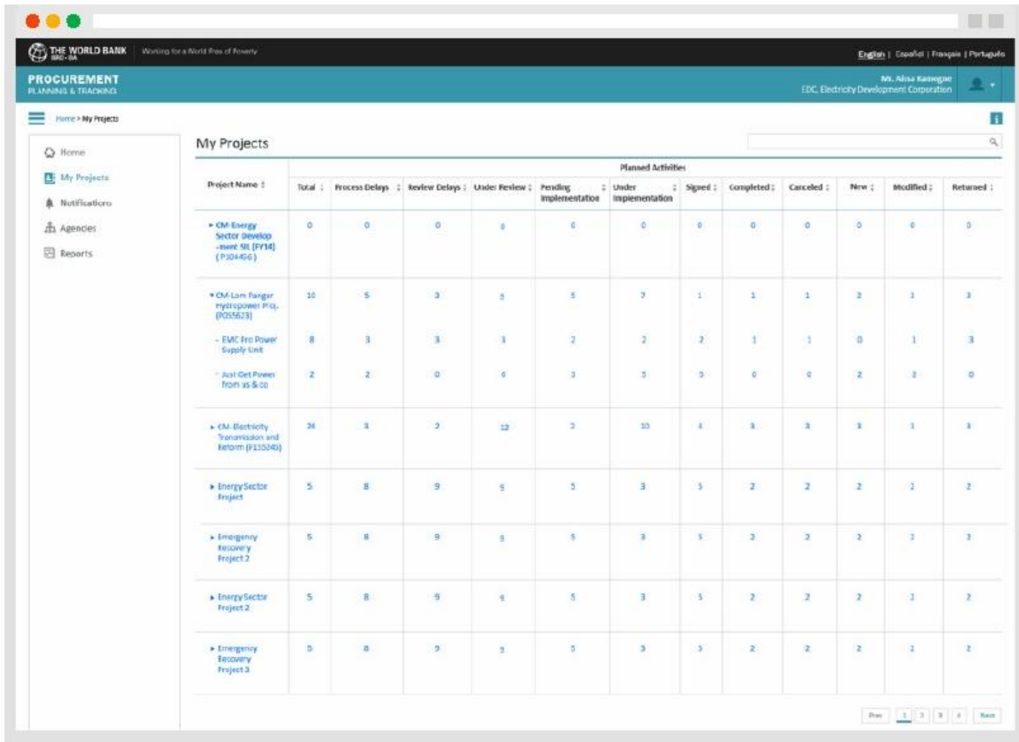


FIGURE 38: Project Dashboard – My Projects Screen

The display details and links in the table are the same as described above in Section 3.3, Activity Status section, with the additional columns described in the table below. Additional features for searching and Pagination are added for the display. The sort order follows the same protocol also described in Section 3.3. Searching will be against Project Names, and more than just exact matching.

Key Features

If the user types a search term, the system will search for the term within the project names. So if the user searches for "Transport" it filters the project display for all project names with the term "Transport" in it.

The user will also have the ability to sort on any of the columns (highest to lowest or lowest to highest). Twenty records will show per page.

Planned Activities Count Columns data

The counts appearing under the Planned Activities header are counts related to specific attributes of the activities. The count at the Project level will be a summation of the

Agency counts. The count at the Agency level will be the total for the Agency for the specific project. If the Agency is a PIU to a project, then the count of activities from that project will be from all activities on the project regardless of which agency they are related to. If the agency is an IA for the project, then the count of activities for that project will be for those activities, which are linked to the displayed agency. The table below defines the rules for calculating the count value for the additional columns that appear in the table.

Column	Rule
Total	The count of activities will count all activities for each agency of the project listed in which the agency can access. This is defined by the role the agency plays with each project. If the Agency is a PIU to a project, then the count of activities from that project will be from all activities on the project regardless of which agency they are related to. If the agency is an IA for the project then the count of activities for that project will be for those activities, which are linked to the displayed agency. Project level display will sum agency level display values. Agency Level will be for each agency the user's agency has access to the procurement plan.
Signed	This will use the same count approach as the Total count of activities above but will only count those activities where the Activity Process Status is "Signed" Project level display will sum agency level display values. Agency Level will be for each agency the user's agency has access to the procurement plan.
Completed	This will use the same count approach as the Total count of activities above but will only count those activities where the Activity Process Status is "Completed". Project level display will sum agency level display values. Agency Level will be for each agency the user's agency has access to the procurement plan.
Canceled	This will use the same count approach as the Total count of activities above but will only count those activities where the Activity Process Status is "Canceled". Project level display will sum agency level display values. Agency Level will be for each agency the user's agency has access to the procurement plan

Link Functionality

Link	Rule
Total	When clicked this link calls the Procurement Plan page and display all activities in the plan. If the Agency for the User is the PIU for the Project, then the plan that is displayed is the All Plan view. If the Agency for the User is an IA then the plan that is displayed is

	the individual IA plan for the user's agency.
Signed	If the Agency for the User is the PIU for the Project, then the plan that is displayed is the All Plan view. If the Agency for the User is an IA then the plan that is displayed is the individual IA plan for the user's agency.
Completed	When clicked this link calls the Procurement Plan page and display all activities in the plan where the Process Status is "Completed". If the Agency for the User is the PIU for the Project, then the plan that is displayed is the All Plan view. If the Agency for the User is an IA then the plan that is displayed is the individual IA plan for the user's agency.
Canceled	When clicked this link calls the Procurement Plan page and display all activities in the plan where the Process Status is "Canceled". If the Agency for the User is the PIU for the Project, then the plan that is displayed is the All Plan view. If the Agency for the User is an IA then the plan that is displayed is the individual IA plan for the user's agency.

3.8 Creating a Procurement Plan - Project Dashboard – Notifications Screen Functionality

The ***View More Upcoming Events*** will open the ***Upcoming Events*** (shown as Upcoming Activities) tab of the ***Notifications/Events*** screen shown below in Figure 39.

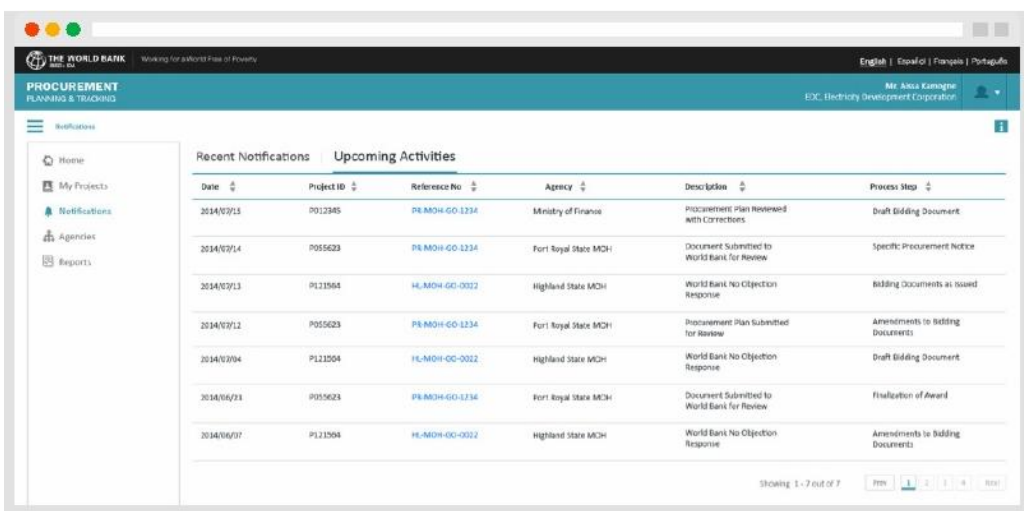


FIGURE 39: Project Dashboard – Notifications Screen

This display will list Activity data related to the query for Upcoming Events. Since the Dashboard display is across projects, the ***Upcoming Events*** display will need to be processed properly for each project linked to the agency. If the user is for the Agency that is the PIU of the project, then the Upcoming Events section will show all events for all agencies for the projects where the agency is the PIU.

For Projects where the agency is not the PIU only events related to that agency will be generated. The data will be generated based on the Revised Plan date values for Activities. Those within 2 weeks (future dates) of the current date will be displayed in the list. This will be for all activities with a "Pending Implementation", "Under Implementation", "Under Review", or "Signed" status. The calculation will be based on the Estimated or Revised Dates for the Procurement Step.

If Any Estimated or Revised date for uncompleted steps is within 2 weeks of the current date then the activity details will appear in the list. Steps that are "Under Review", "Completed", "Approved", or "Cleared" are not considered. If date of step is past the current date (Eastern Time Zone UTC-05:00) then it no longer appears in the Upcoming Events.

The details displayed in order as follows:

Link	Rule
Date	The Revised Plan Date for the Step of the activity appearing in the table based on the selection above.
Project ID	The Project ID for the Activity data selected based on the selection above.
Reference No	The Reference Number of the Activity selected based on the selection above. This column will appear as a link and when clicked opens the Activity Details screen for the activity.
Agency	The Agency Name related to the Project and Activity selected based on the selection above.
Description	The Description of the activity selected based on the selection above.
Process Step	The Activity Step Description for the step related to the activity for the selection above.

3.8.1 Creating a Procurement Plan - Project Dashboard - Notifications Screen Functionality - Viewing More Recent Notifications

The ***View More*** display of ***Recent Notifications*** will display as shown below in Figure 40.

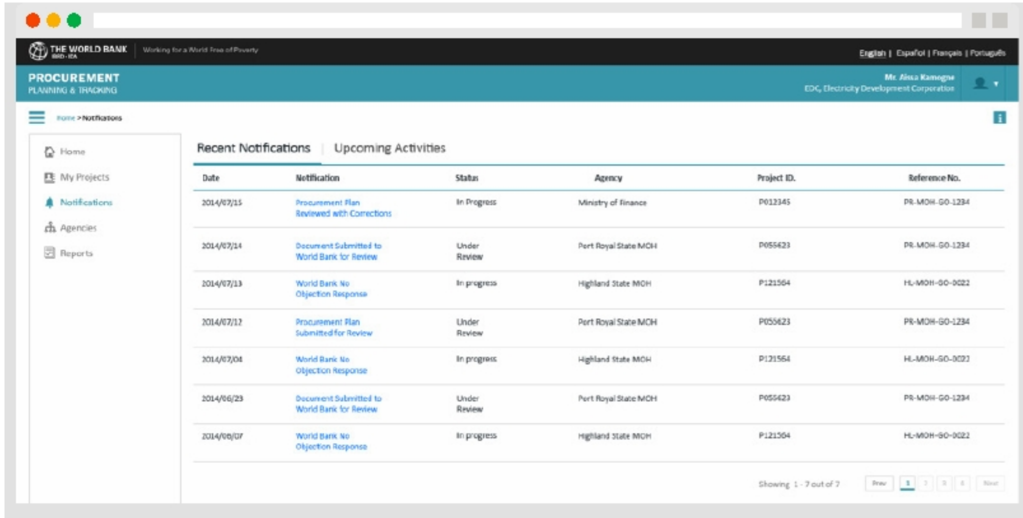


FIGURE 40: Project Dashboard –View More Display of Notifications Screen

The screen will be used for both Recent Notifications and Upcoming Activities. When called from the View More link of the Recent Notifications, it will default to the appropriate tab display. The Attributes from the Notifications will be displayed as listed above for the table columns. The Notification description appears as a link.

When clicked, it will open the notification in the appropriate page (Communication Log of Project) or (Activity Step Screen in Project Activity). The screen will be called, and the selected notification will open. The user can then take action from the notification by clicking the link in the Notification column.

This will take the user to the Communication Log for the Agency if it is a Plan notification, or will take the user to the Activity Step action record in the Review Actions section for the step if the notification is for a procurement step action.

The display will list notifications from the current date to two weeks prior (14 days).

3.8.2 Creating a Procurement Plan - Project Dashboard - Notifications Screen Functionality – Under Implementation Tab

The Under Implementation Tab will have the above column display. The data is queried based on the following criteria:

- The selection of the activity data will occur the same way as defined for the count data in Section 3.3 above.
- The selection needs to be made by project.

- If the Agency is a PIU to a project, then the selected activities from that project will be from all activities on the project regardless of which agency they are related to.

- If the agency is an IA for the project then the selection of activities for that project will be for those activities that are linked to the displayed agency.

For the ***Under Implementation*** tab - This will filter for only those activities where the Activity Process Status is ***"Under Implementation".***

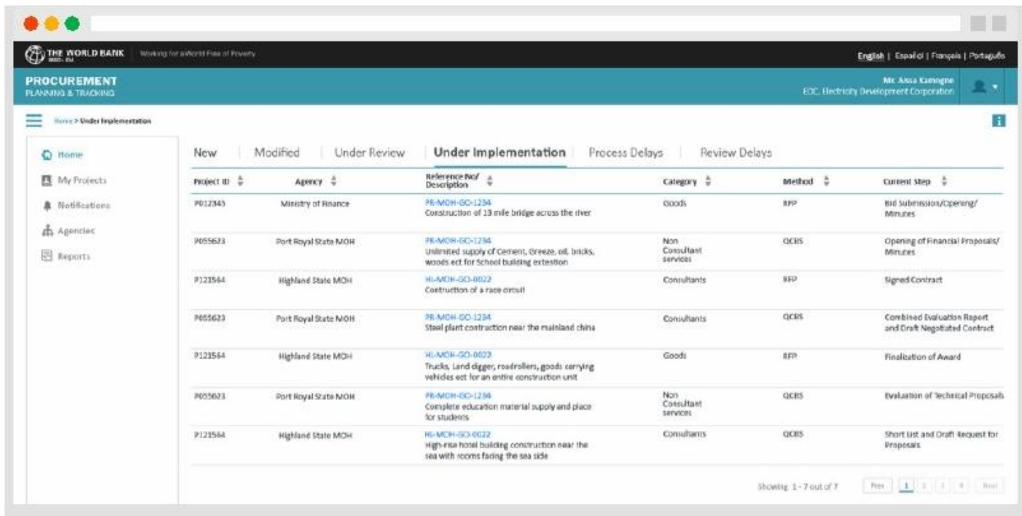


FIGURE 41: Project Dashboard –View More Display of Notifications Screen – Under Implementation

The below table identifies the data for the columns. The returned data is sort able for each column and there is pagination. Twenty records are displayed per page.

Column	Description
Project ID	The Project ID for the Activity data.
Agency	The Agency Name related to the Project and Activity selected based on the selection above.
Reference No/Description	The Reference Number and Description of the Activity selected based on the selection above. The Reference Number will appear on the first line in the column and the Description value will appear starting on the next line as in the display above. The Reference Number will appear as a link and when clicked, will open the Activity Details screen for the activity. Mouse over will show full description.
Review Type	The Review Type for the Activity data selected based on the selection above.
Category	The Procurement Category for the Activity data selected based on the selection

	above.
Method	This shows the Combination of the Method Code " - " Method Type values.
Current Step	This is the current active Step for the Activity. This step can be identified by selecting the next STEP CODE from the last completed/Approved/No Objected step in the process for each activity. Note that Amendment Steps and Termination Steps will not be included as part of the calculation, as they do not have planned dates. Even if users are adding documents/reviews for those steps they are not a normal sequenced step in the execution of the activity.

3.8.3 Creating a Procurement Plan - Project Dashboard - Notifications Screen Functionality – Process Delays / Review Delays Tab

The ***Process Delays/Review Delays*** Tab will have the above column display. The data will be queried based on the following criteria:

The selection of the activity data will occur the same way as defined for the count data in Section 3.3 above. The selection needs to be made by project. If the Agency is a PIU to a project, then the selected activities from that project will be from all activities on the project regardless of which agency they are related. If the agency is a IA for the project, then the selection of activities for that project will be for those activities that are linked to the displayed agency.

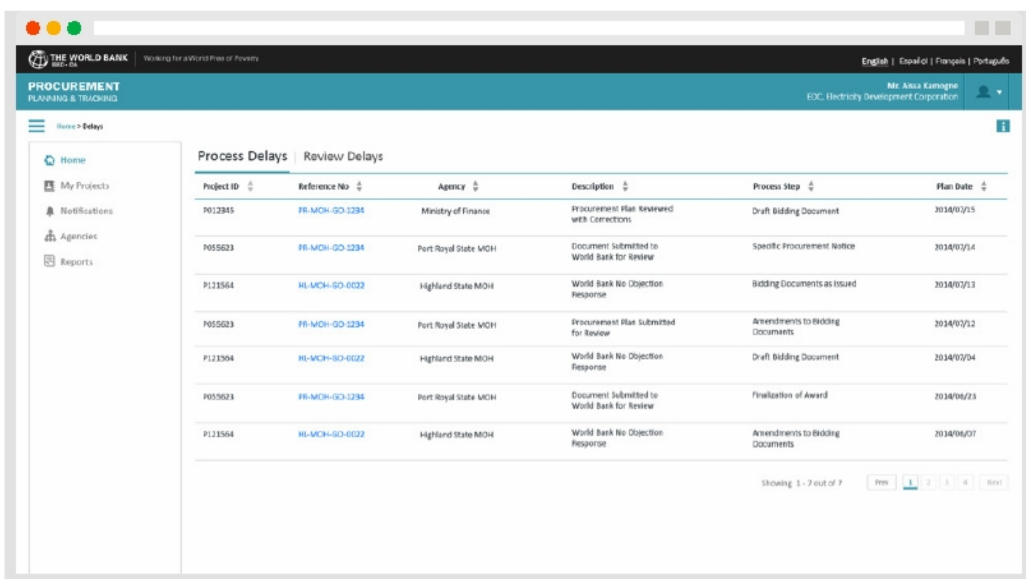


FIGURE 42: Project Dashboard –View More Display of Notifications Screen – Process Delays/Review Delays

The Process Delays tab - Will filter those activities where the Activity Process Status is "Under Implementation" or "Pending Implementation". For "Pending Implementation" activities, a Process Delay Status occurs if the Revised Plan Date for the first step has already passed. For "Under Implementation" for the Next Process Step of an activity, which is the next step after the last completed step (a completed step is either marked as completed/approved/cleared or has an Actual Date for the step) has a Revised Plan Date that is in the past. Note that Amendment Steps and Termination Steps are not included in the calculation, as these do not have planning dates.

The Review Delays tab - Will filter those activities where the Activity Process Status is "Under Review". If the current Document Submission is under review for a step in an activity, then for the step that is under review will need to calculate whether or not there is a review delay. The review delay calculation is based on the Review Level for the activity and based on the time period between when the Document Submission was made to the Bank from the Client and The Bank's Interim Response or No Objection. If there is a submission from the Client without a review response from the Bank and the numbers of days are beyond the business standard, then the activity is included in the review delay activities. The business standard for each review level is:

- APS Review - 7 days
- APM Review - 17 days
- OPRC Review - 17 days

The table below identifies the data for the columns. The returned data will be sortable for each column, and there will be twenty (20) records displayed per page.

Column	Description
Project ID	The Project ID for the Activity data.
Reference No	The Reference Number of the Activity is selected based on the selection above. The Reference Number will appear as a link and when clicked opens the Activity Details screen for the activity
Agency	The Agency Name related to the Project and Activity selected based on the selection above.
Reference No Description	The Description of the Activity is selected based on the selection above. The Description value will show 2 lines of the description.. A mouse over will show the full description.
Process Step	This is the step for the Activity for which the Process or Review delay is occurring. The name of the step is displayed.
Plan Date	This is the Revised Plan Date value for the Step of the Activity for which the Process or Review delay is occurring.

3.8.4 Creating a Procurement Plan - Project Dashboard – Project Details Page – Activities Summary

This section contains cross cutting data across all the projects listed by the user. The following rules define the criteria for pulling the data for each displayed attribute.

Column	Description
# of activities in # projects	The count of activities will count all activities for all the projects listed for the user. The count of projects will count all the projects listed for the user.
New	This will use the same count approach as the count of activities above but will only count those activities where the Activity Status is "New".
Modified	This will use the same count approach as the count of activities above but will only count those activities where the Activity Status is "Modified".
Under Review	This will use the same count approach as the count of activities above but will only count those activities where the Activity Process Status is "Under Review".
Under Implementation	This will use the same count approach as the count of activities above but will only count those activities where the Activity Process Status is "Under Implementation".

3.9 Create a General Procurement Notice - Project Details Screen

This section outlines the actions the Client user is required to take in creating the General Procurement Notice (GPN) after receiving a "No Objection" response from the Bank to the Client Procurement Plan.

However, the Client Project Details screen (Figure 43), and its different sections, will be described here first.

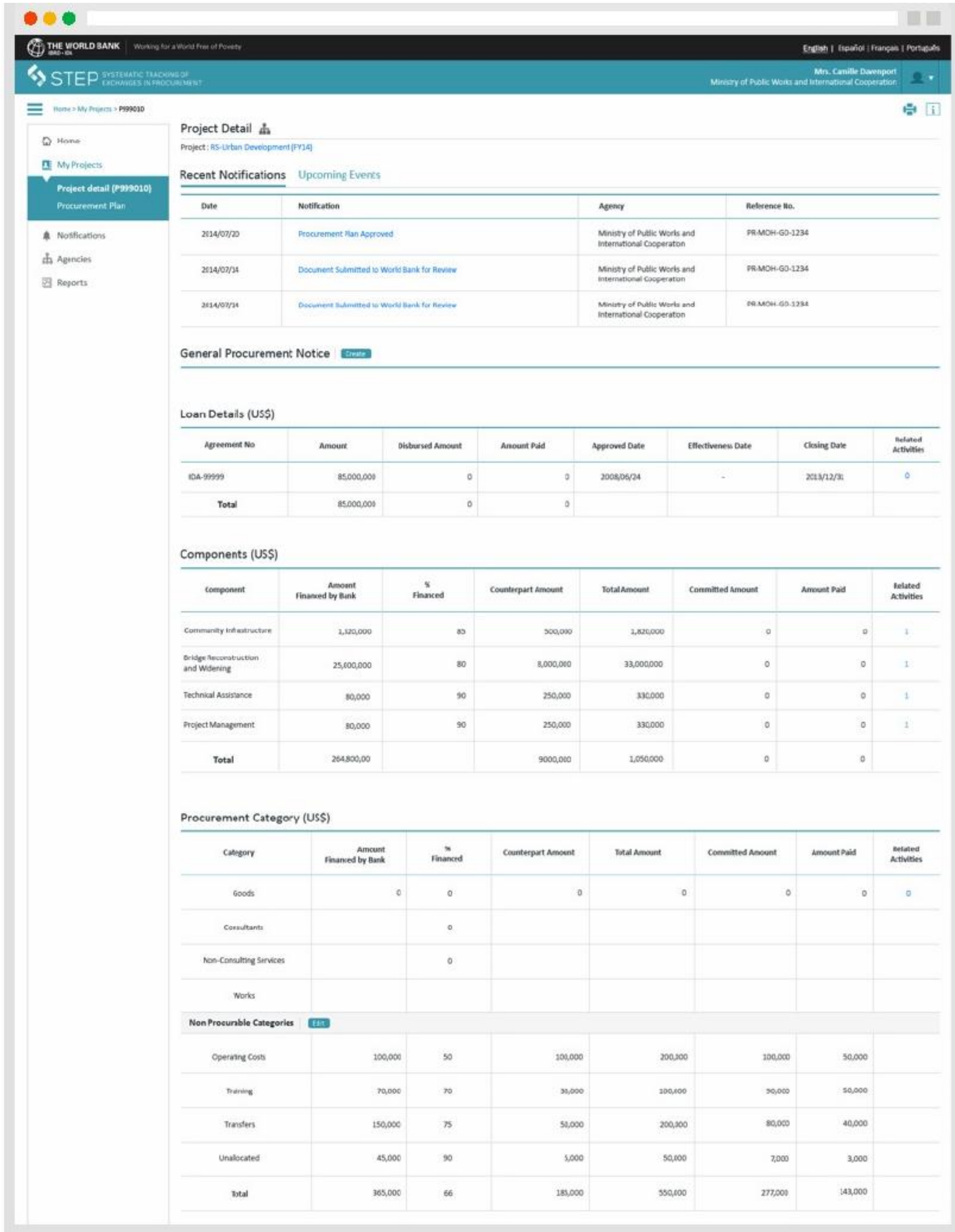


FIGURE 43: Client Project Details screen

3.9.1 Create a General Procurement Notice - Project Details Screen - Recent Notifications

The Recent Notifications Section is shown below in Figure 44.

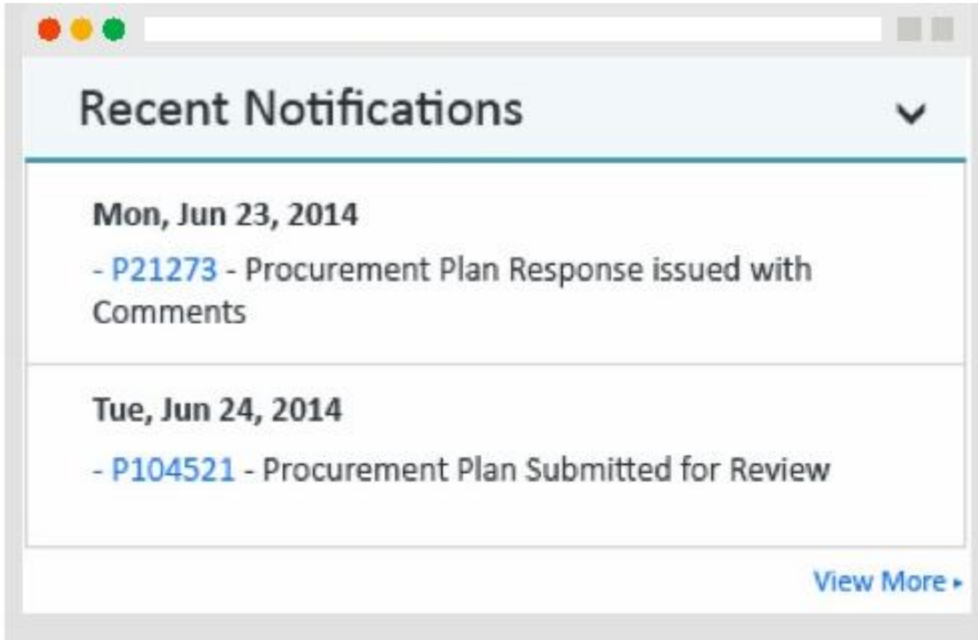


FIGURE 44: Project Details screen - Recent Notifications Project Details

The ***Recent Notifications*** section list notification communications that have been sent between the Bank/Client or STEP/Client. The notifications are for Plan submissions and reviews, Document submissions and reviews, Notice submissions and reviews, and for system notifications to the Agency users.

In the display, the notification itself will appear as a link rather than the Project ID as displayed. The link will open the notification in the communication log screen, or if related to an activity step, open up the step screen and notification communication in the Review Actions section.

If the user is for the Agency that is the PIU of the project, then the Notifications section will show all notifications for all agencies for the projects where the agency is the PIU. For Projects where the agency is not the PIU only notifications related to that agency will be generated.

The display will show the most recent 5 notifications.

Clicking on the View More opens up the Notifications Screen for viewing all notifications.

3.9.2 Create a General Procurement Notice - Project Details Screen – General Procurement Notice

This section will have data once the GPN is sent to the Bank for No Objection. When the GPN is sent for No Objection, then the GPN can only be accessed from the ***View Notice*** functionality shown below in Figure 45.

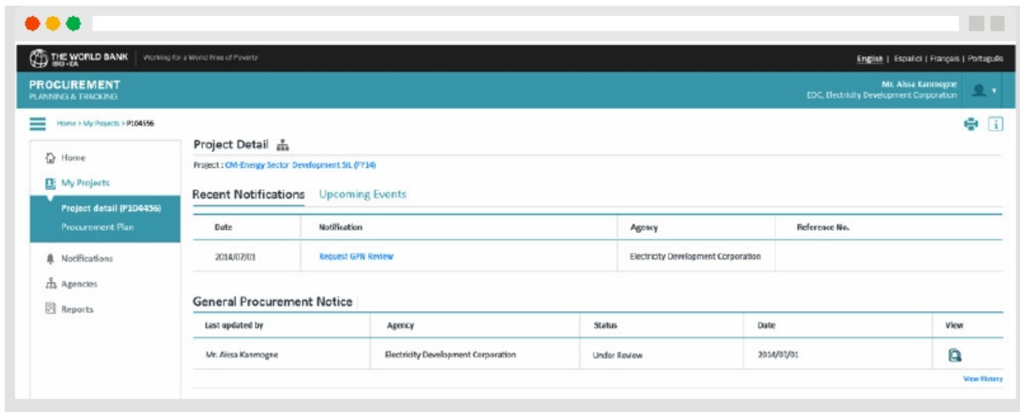


FIGURE 45: Client Project Details screen - General Procurement Notice

Key Features

In the GPN section of the Project Details screen, the Edit button will no longer be available for Client users to edit the GPN

3.10 GPN Procurement Notice Review Functionality - Client View

The Review Actions section is displayed on the screen after sending to the Bank. All review requests and responses will be displayed in the review actions sections for each send and response for the history of the GPN Notice. The displayed details will be for the current notice being reviewed or edited. Below the Review Actions the Recall Review button is displayed (Figure 46).

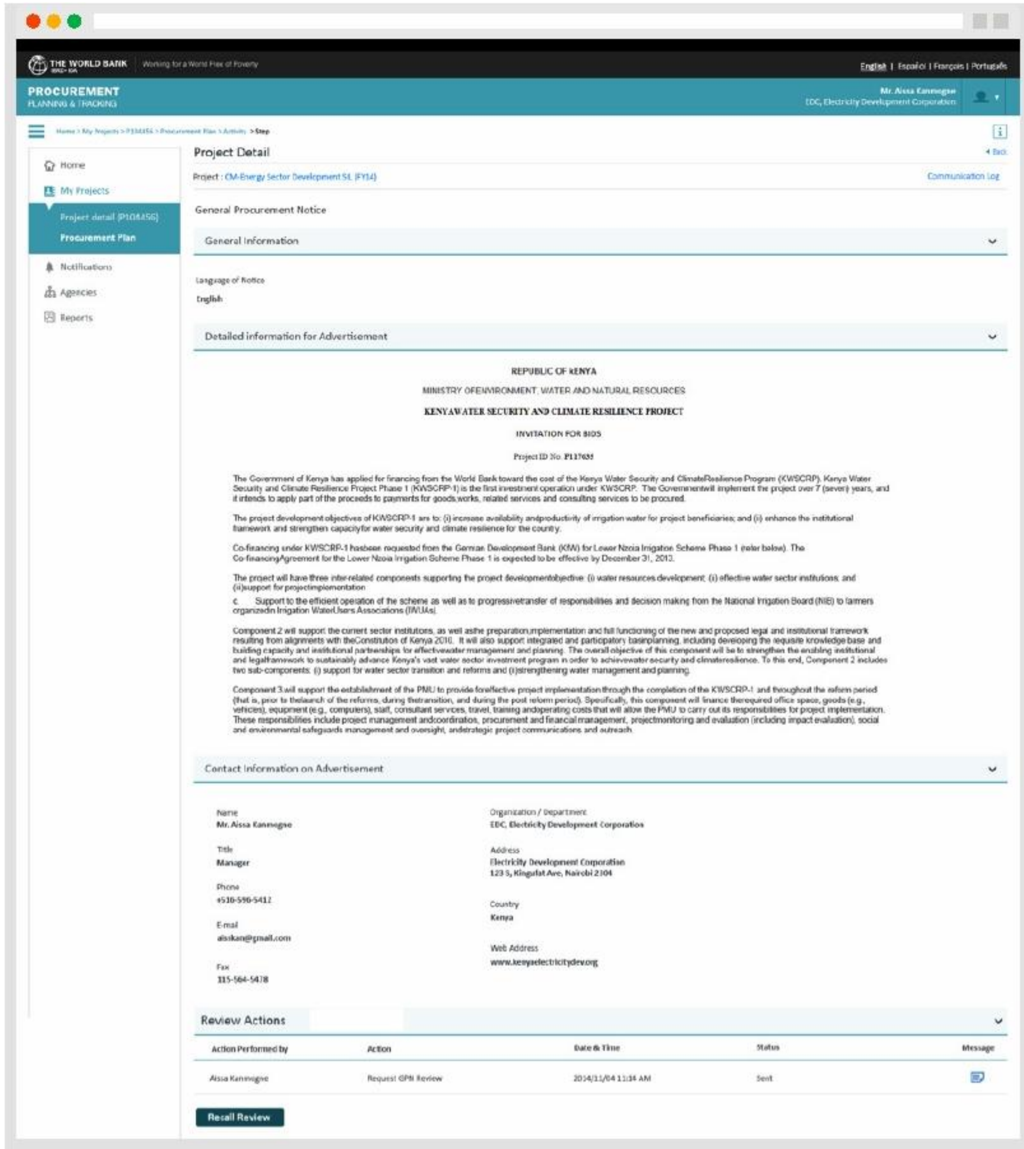


FIGURE 46: Recall Review of GPN

This button is only available after sending the Procurement Plan for review by the Bank and if no review has yet been performed by the Bank. If Bank Staff have initiated/submitted review correspondences then the Recall Review button will no longer be available to the Client. The Client would need to request the Bank to Cancel the review if the Bank has begun the review process. The Action/ Notification for the Recall Review is "General Procurement Notice Submission Recalled". Also see table of actions/responses email section below.

The Client cannot edit the notice while being reviewed by the Bank. When in view mode the full text of the notice appears in the Full Official Text of the Notice. Notifications appear in the Notification's Section for the Project/Dashboard, Communications Log, and in the Review Actions section of the GPN in both Client and Bank Screens.

Table of Actions / Responses Section

The below table documents the Actions/Responses for General Procurement Notices.

Scenario	Statuses	Email Setup
GPN Submitted to Bank by PIU/IA **Button:** 'Submit to Bank'	Email	To: TTL Cc: Submitting Agency Users, PIU Users (if applicable/necessary), Bank Team Members Subject: GPN: <Agency Name> has submitted the General Procurement Notice for <Project ID> - <Project Name> for Review Email Body: <Submitting User Name> - <Agency Name> has submitted the GPN for <Project ID>-<Project Name> for review. <Links to GPN Notice View Screen (Client/Bank)> <Text to be typed by the submitting user>
	Recent Notifications	Request General Procurement Notice Review
	Communication Log - Action	Request General Procurement Notice Review
	Communication Log - Status	PIU Users - Sent, IA Users - Sent, Bank Users – Received