BAN'DEYRI PORTAL: PROCUREMENT PLAN MODULE

User Guideline for Procurement Officer & Finance Executive Role

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Ministry of Finance

Republic of Maldives

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Module Access

You must be assigned one of the following Role to have access to this module.

#	Role Name	Description
1	Procurement Officer	Permission to View and Create Procurement Plan
2	Finance Executive	Permission to View and Authorize Procurement Plan

How to Add Procurement Plans

Required Role: **Procurement Officer**

To add new items to plan, follow the below steps:

1- Click "Procurement Plan" on the left sidebar menu.
2- Click "Procurement Plan" under "Procurement Plan".
3- Click one of the following buttons:
    a. "Goods" button to add items to Goods Plan.
    b. "Works" button to add items to Works Plan.
    c. "Consultancy" button to add items to Consultancy Plan.
    d. "Non-Consultancy" button to add items to Non-Consultancy Plan.

4- Click "Add" tab.

5- Fill in the Form and click the "Save" button as shown below.

When adding items to the plans, use reference numbers as follows:
For Goods: Office No/2024/G-01
For Works: Office No/2024/W-01
For Consultancy: Office No/2024/C-01
For Non-Consultancy: Office No/2024/NC-01

6- Follow the above steps to add each item.

How to View Procurement Plans

Required Role: **Procurement Officer, Finance Executive**

To view the plan, follow the below steps:

1- Click "Procurement Plan" on the left sidebar menu.
2- Click "Procurement Plan" under "Procurement Plan".
3- Click one of the following buttons:
    a. "Goods" button to view Goods Plan.
    b. "Works" button to view Works Plan.
    c. "Consultancy" button to view Consultancy Plan.
    d. "Non-Consultancy" button to view Non-Consultancy Plan.

4- Click "List" tab if not already selected.

5- You may use the available filter options to narrow the displayed items in the plan and then click the "Filter" button. Click the "Reset Filter" button to clear your selections.

6- The table at the bottom shows the items in the procurement plan.

7- To view more information about the item, click the button in the "Action" column and then click "View". This will open the item in a new tab as shown in the second image below.

How to Delete Item from Plan

Required Role: **Procurement Officer**

Items that have not been authorized or rejected can be deleted. To delete an item, locate the item by following the instructions up to step 6 in How to View Procurement Plans. Then follow the below steps:

7- Click the button in the "Action" column.

8- Click the "Delete" button. This will open a prompt asking to enter the reason for deleting.

9- Enter the reason for deleting and click the "Delete" button.

How to Authorize/Reject Item from Plan

Required Role: **Finance Executive**

Items that are pending can be authorized. <u>Items that are authorized or pending can be rejected.</u>
To authorize or reject an item, locate the item by following the instructions up to step 6 in <u>How to View Procurement Plans.</u> Then follow the below steps:

7- Click the button in the "Action" column.

8- Click the "Authorize" button to authorize it. This will open a prompt asking to enter "Remarks". This is optional. Click the "Yes" button to authorize it.

9- Click the "Reject" button to reject it. This will open a prompt asking to enter the reason for rejection. Enter the reason and click "Save".

How to Download Procurement Plans

Required Role: **Procurement Officer, Finance Executive**

You can download procurement plans for internal (office) use and external (public) use. Download options include PDF, Excel and printable page within the browser.

The plan can be of an individual agency, or all the agencies combined (consolidated). If your role is Procurement Officer or Finance Executive, a consolidated plan will include the procurement plan of your agency and sub-agencies (agencies under your agency).

To download procurement plan, follow the below steps:

1- Click "Procurement Plan" on the left sidebar menu.
2- Click "Procurement Plan" under "Procurement Plan".
3- Click one of the following tabs:
    a. "Goods" tabs to download Goods Plan.
    b. "Works" tabs to download Works Plan.
    c. "Consultancy" tabs to download Consultancy Plan.
    d. "Non-Consultancy" tabs to download Non-Consultancy Plan.
4- Click the preferred format from the available options.