



Indian Ports Association (IPA) Implementation of Port EBS Project

Enterprise Business System

Business Process Manual for Calibration/Statutory/Survey Maintenance

Submitted by:



Plot No. 58 A & B, Noida Special Economic Zone, Uttar Pradesh-201305

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This document is a desk reference tailored to the Maintenance Specialists. It is intended to provide information that will be helpful to support the Maintenance processes.

Document History:

Authors & Participants	
Role	Name

Revision History				
Date	Document Version	Document Revision Description	Author	
20.07.2020	1.0	Initial Draft	Sabariayyappan Balasubramaniyan, Mona Pal	





Reviewed and Approved By			
Name	Title	Date	Approved

Introduction:

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The purpose of the document is to give awareness of the complete cycle of how the Calibration/Statutory/Survey Maintenance Process Handled in S4H (SAP) to the respective users.

Summary:

In this chapter, we are going to learn about how Calibration/Statutory/Survey Maintenance transactions will be handled in SAP system. Equipment/Asset Planned maintenance is covered in this business process manual document.

Its starts right from Maintenance Order, material PR, Service PR up to maintenance order closure.

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Creation of Maintenance Plan:

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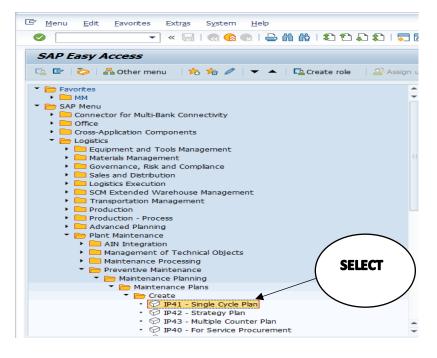
The below transaction code which we can use for creation of Maintenance Plan for Calibration/Statutory/Survey Maintenance Activity, this will be one time activity for coming years for functional location/equipment/Asset for planned Maintenance.

Step 1: Enter Transaction code IP41 in command bar (or) Follow the below navigation path Double click on "IP41" the system will open the below screen

In the next screen, enter the required details as below

Under Initial Screen:

Maintenance Plan Category (PM Maintenance Order) press enter key to proceed



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		•	« 🛛	🗟 🚫	👷 l 🗁 🕅	1 ()	n D
(Create Main	tenance	e Plan:	Initia	/		
Ма	intenance plan						
Ma	int. plan cat.	Maintenan	ice Order		-		
		-			-		

Enter Description of Maintenance plan, Cycle Unit, Functional Location & Object list for proceed further. Shown below.

Create Maintenance Plan: Single cycle plan				
Maintenance plan	Cal/Stat/Survey Maint			
🛅 Maint. plan hea				
Maintenance plan cycle M	aintenance plan scheduling parameters	Maintenance plan additional data		
Cycle/Unit Cycle text Offset/Unit Counter				

Enter the Item Details ie Equipment/ Functional Location Details and Maintenance Text and Press Enter

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Maintenance pla	n cycle 🛛 Mainter	nance plan scheduling paramet	ers Maintenance plan additional data
ycle/Unit		l yr	
ycle text			
)ffset/Unit			
Counter		Mi	
Item Object	: list item / Item	location	
laintenance Item		Cal/Stat/Survey Maint	
Reference object			
Functional loc.	1000-COTN-0002	2	
Equipment	10000340		

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Item Object	ist item V Item location							
Aaintenance Item	Cal/Stat/Survey Maint							
laintenance Item								
Reference object								
Functional loc.								
Equipment 10000340 5 HP Pumping Set No. 1								
Assembly								
Planning Data								
Planning Plant	1000 Mumbai Port Trust Maint. Planner Group 107 MEED							
Order Type								
Main WorkCtr	PM_CME / 1000 PM CME Departme Business Area							
Priority	🔻 Settlement Rule 🗋 🚱 🖉							
Sales Document								
Item Obj	ect list item / Item location							
Maintenance Iten	n 161 Cal/Stat/Survey Maint							
Maintenance Iten	n 161 Cal/Stat/Survey Maint							
Location data	1000 Mumbai Port Trust							
MaintPlant Location	1000 Mumbai Port Trust							
Room								
Plant Section								
Work Center								
ABC Indicator Sort Field	B Medium							
Sort Field								
Account assignm	ent							
Company Code	1000 Mumbai Port Trust Mumbai							
Asset								
Business Area								
Cost Center WBS Element	10050401 Material Mgt Div-Gen CO Area 1000							
vibo ciement								

The other details from the equipment copied over the Planning Data and Location Details

go to next tab at header level to fill the details of Call Horizon, Scheduling Period and Start date of Maintenace Plan.

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Create Maintenance Plan: Single cycle plan						
Maintenance plan	Cal/Stat/	Survey Maint]		
🔁 Maint. plan hea						
Maintenance plan cycle	aintenance pla	n scheduling parameters	Maintenanc	e plan additional data		
Date determination		Call control parameter		Schedu ing indicator		
Shift Factor Late Compl.	8	Call horizon	80 %	⊙ Tim		
Tolerance (+)	8	Scheduling period	10 YR	◯ Timi - key date		
Shift Factor Early Compl.	8	Completion Requirmnt		○ Time - factory caldr		
Tolerance (-)	8					
Cycle modification factor	1,00	Start scheduling				
Factory calendar		Start of cycle	01.01.2020			
			L			

After that click on save button, on the bottom you will get the msg after save with Maintenance Plan

Number. Maintenance plan 11 changed

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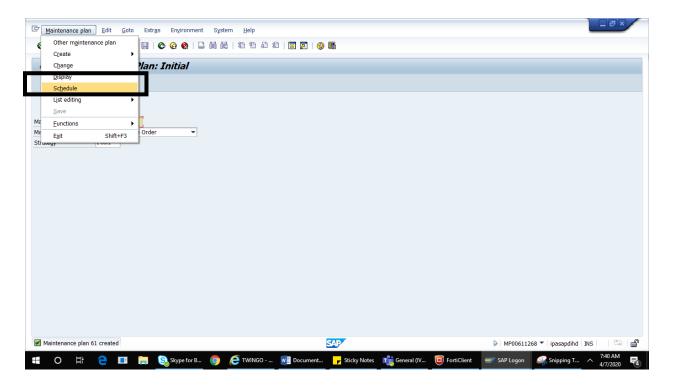




Scheduling of Maintenance Plan

After this Step it will behave the same as Preventive maintenace plan Scheduling and Execution.

To plan/schedule the Maintenace Plan click the Menu on the same screen or enter transaction Code IP10









This will show the screen below and press "Start" button.

				8 😧 🗁 🖞 🥼 🎝 🎝 🞝				
Þ	Schedu	ıle Mainte	enance Pl	lan: Single cycle plan (0000000	0001	1	
tar	t Start in cyc	le New Star	t Manual	call 🛛 🗐 🔹 Schedule overview	list			
nte	nance plan	11	Cal/Stat/S	urvey Maint				
/ 5	Scheduled calls	Manual cal	Mainten	ance plan scheduling parameters	Maintena	nce plan a	additional dat	а
Sc	heduling List							
С	PlanDate	Call date	Completio	Scheduling Type / Status	Act	Unit		
1	31.12.2020		03.07.2020	New start Complete	181-	Da		*
2	31.12.2021			Scheduled Called				-
3	31.12.2022	19.10.2022		Scheduled Hold				
4	31.12.2023	19.10.2023		Scheduled Hold				
5	30.12.2024	18.10.2024		Scheduled Hold				
6	30.12.2025	18.10.2025		Scheduled Hold				
7	30.12.2026	18.10.2026		Scheduled Hold				
8	30.12.2027	18.10.2027		Scheduled Hold				
9	29.12.2028	17.10.2028		Scheduled Hold				
1(29.12.2029	17.10.2029		Scheduled Hold				
1:	29.12.2030	17.10.2030		Scheduled Hold				Ŧ
1	Image: A state of the state							()×

Press **"Enter"** it will show the calls can be generated based on start date and task list packages. Save the same and see the list of generated orders.

You can do scheduling with IP30 also where you can schedule more than one Maintenance Plan

You need to provide Maintenance Plan Numbers, Maint. Plan Category, Strategy & Duration & Execute.

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៤ <u>P</u> rogram <u>E</u> dit <u>G</u> oto S <u>v</u> stem	<u>H</u> elp		
📀 🔍 👻 🖌	🕅 🖨 I 😞 🚷	🏀 S S A S I 💭 🗖] 🕜 🖳
Deadline Monitoring for M	laintenance Dla	ns (Ratch Innut ID1	(0)
		ns (Batch Input 171	0)
Deadline monitoring for maintenance plan	5		
Maintenance Plan	1	to 4	
Maint. plan cat.	PM	to	
MaintPlan sort field		to	
Maintenance Strategy		to	
Interval for Call Objects	365 DAY		
Rescheduling incl.	JOS DAI		
✓ Immediate start for all			
Log Control			
Application Log			
OLog (Batch Input)			
Mode: Call transaction / BDC session			
Call transaction			
Call mode	N		
OBDC session			
Group name	IP1020200720		
User ID	SB00621355		
Save incorrect transactions			
Save errors			
○ PC file/frontend			

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SAP User Manual for Calibration/Statutory/Survey Maintenance

It will generate the schedule as below and then press Back $^{igodoldsymbol{arepsilon}}$

Button

♥ [_ _] < ■ | ♥ ♥ ♥ | ■ ■ ₪ ₪ | Ҽ Ѣ Ѡ | № № | № ₪</p>

	- //	Nu	External ID	Objectiont	Cubabiant Taut	Transacti	Due energy	Mode	Log number
Date/Time	.04.2020 08:03:36 MP00611268		IP1020200407	Object text	Subobject Text	TP30	Program RISTRA20		000000000000000573719
	Problem class Other	32	IP1020200407	Application Log fo		1P30	RISTRAZU	Dialog proce	000000000000000000000000000000000000000
	Problem class Other	32							
r I E	i the title is the second s		6. 1						
	sage Text						LTxt		
	art in the cycle was executed for mai	intenan	ce plan 61				2		
	ts were determined: See cost overvie						9 9		
Orde	er %00000000001 will be released a	fter upd	late				_		
Cost	Costs were determined: See cost overview						2		
Orde	Order %0000000002 will be released after update								
Cost	Costs were determined: See cost overview						8		
Orde	Order %0000000003 will be released after update								
Cost	ts were determined: See cost overvie	ew					8		
	er %00000000004 will be released a		late						
_	ts were determined: See cost overvie						8		
_	er %00000000005 will be released a		late						
_	ts were determined: See cost overvie						2		
_	er %00000000006 will be released a		late						
-	ts were determined: See cost overvie						8		
_	Order %0000000007 will be released after update								
-	Costs were determined: See cost overview					8			
_	er %00000000008 will be released a		ate						
Cost	ts were determined: See cost overvie	ew					8		

Click on "Back " button again for exit.

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To see the list of all generated Orders you need to run the Transaction IP24, with Functional Location/Equipment/Maintenance Plant/Maintenance Plan Numbers and "Execute"

<u>P</u> rogram <u>E</u> dit <u>G</u> oto S <u>y</u>	stem <u>H</u> elp			
	× 님 👧 🚫 😡 🖴 [ងសុរសភាព	1 🗖 🗖 🖉 💻	
Scheduling overview	list form: Selectio	n Criteria		
🚯 🚹				
· _				
Maintenance item selection				
Maint, plan cat.	PM	to		
MaintPlan sort field		to		
Maintenance Plan	11 0	to		
Maintenance Item		to		
Maintenance Strategy		to		
Maint. item text		to		
Functional Location		to		
Equipment		to		
Assembly		to		
Material		to		
Serial Number		to		
Settlement rule	with or w/o	⊖w/	○w/o	
with object list				
Maintenance dates				
Order		to		
Notification		to		
Entry Sheet		to		
Scheduled start date		to		
Completion date		to		
Scheduling status		to		
	0 11 1	0 1	0.1	

This will show the list of all generated and yet to generate the Maintenance Order.

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Scheduling over	rview list fo	rm: Maintenance Scheduling Overvie	w List		
1 🖸 🖪 🖪 🚢 Ŧ	7 🖪 🗐 🗞	Maintenance item Maintenance plans 嶞			
S. Maintenance Item	MntPlan	Strat. Maintenance item description	Call Number	Start date	Order
161	11	Cal/Stat/Survey Maint	1	31.12.2020	1000081
161	11	Cal/Stat/Survey Maint	2	31.12.2021	1000101
161	11	Cal/Stat/Survey Maint	3	31.12.2022	
161	11	Cal/Stat/Survey Maint	4	31.12.2023	
161	11	Cal/Stat/Survey Maint	5	30.12.2024	
161	11	Cal/Stat/Survey Maint	6	30.12.2025	
161	11	Cal/Stat/Survey Maint	7	30.12.2026	
161	11	Cal/Stat/Survey Maint	8	30.12.2027	
161	11	Cal/Stat/Survey Maint	9	29.12.2028	
161	11	Cal/Stat/Survey Maint	10	29.12.2029	
161	11	Cal/Stat/Survey Maint	11	29.12.2030	

Schedule generated for one year from the date of trigger example 01.01.2020+365 days

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Open Order in IW32 and start execution of operation on given dates, as per operation you can go for tendering activity, internal execution.

🔋 . Cl	nange Calibration/Statutory/Survey Maintenance 1000101: Ce	em
9 🛛 🖓	🐬 闷 💺 🕞 🗾 🌌 📋 Complete (business)	
Order	ZM03 1000101 Cal/Stat/Survey Maint 🛛 👔	
Sys.Status	REL NMAT PRC	
HeaderD	ata Operations Components Costs Objects Additional Data Location	Yr
Person resp	onsible	
PlannerGrp	107 / 1000 MEED Notifctn	
Mn.wk.ctr	PM_CME / 1000 PM CME Departm Costs 0,00 INR	
	PMActType	
	SystCond.	
Dates		
Bsc start	31.12.2021 Priority T	
Basic fin.	31.12.2021 Revision	
Reference of		
Func. Loc.	1000-COTN-0002 Kala Chowkey	
Equipment	10000340 5 HP Pumping Set No. 1	
Assembly	I I I I I I I I I I I I I I I I I I I	
First operati	on	
Operation	Cal/Stat/Survey Maint Calc. key Calculate duration 🔻	
WkCtr/Plnt	PM_CME / 1000 Ctrl key PM01 Acty Type PRT	
Work durtn	H Number Oprtn dur. H Comp.	

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External Service Creation in Maintenance Order

PL Change Calibration/St	tatutory/Survey Maintenance 1000101: Operation Ove						
🖺 🖩 🌮 🍂 🛼 🖹 🖉 🖆 Complete (business) 🗟 🗟							
Order ZM03 1000101 Cal/S Sys.Status REL GMPS JBFI MANC NMAT	itat/Survey Maint						
HeaderData Operations Components Costs Objects Additional Data Location Planning Control							
General Internal External	Dates Act. Data Enhancement 🐺 📘 🛼 Ex. Factor 📑 Catalog						
OpAc SOp Work Ctr	Plant Co StTextK S Operation short text L Actual						
0010 PM_CME	1000 PM01 Cal/Stat/Survey Maint						
0030 PM_CME	1000 PM01 Cal/Stat/Survey Maint 1000 PM03 Cal/Stat/Survey Maint by External Vendor						

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For Cal/stat/survey Maint by External Vendor, change the control key from PM01 to PM03 because of Tendering activity.

🖲 Chan	ge Calibration/Sta	tutory/Survey	/ Maintenance	1000101	: Operation
9 🖬 🖬 🌮	10 🚯 🔂 🗐 🖉 😫	Complete (business)			
Sys.Status REL	NMAT PRC	t/Survey Maint			
🔄 Change Calibrati	on/Statutory/Survey Mainten	ance 1000101: Exter	nal Proc		
Opr. short text	Cal/Stat/Survey Maint by Ex	ternal Vendor			n Planning
Operation qty	1 AU	Sort Term			Factor Ca
Price	0,00 INR	per	1		Factor G
Material Group		Cost Element			
Purch. Group	302 / 1000	Vendor			/endor
Agreement		Info record			vendor Vendor
Recipient		Unloading Point			/endor
Requisitioner		Tracking Number			Vendor
Pl. Deliv. Time	Subcontr.	FW Order	1		
Er Er	rror		X		
	External operation> pleas	e enter material grou	ר ב ק)
0100					
0120					
0130					
	1 CME 1	000 PM01	_		
< >					

And Press, "Enter"

Enter details of Material Group, Purchasing Group & Plant, press Enter, and fill the same details for next operation.

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📃 Chai	nge Calibration/Sta	tutory/Survey	/ Mainter	nance 1000)101: (
9 🖬 🖬 🍄 💎	Po 🗞 🕞 📰 🖉 🗎	Complete (business)			
Order ZM0	3 1000101 Cal/Sta	at/Survey Maint			1
Sys.Status REL	MANC NMAT NTUP PRC	i			
🔄 Change Calibrat	ion/Statutory/Survey Mainten	ance 1000101: Exter	nal Proc		×
Opr. short text	Cal/Stat/Survey Maint by Ex	ternal Vendor			n
Operation qty	1 AU	Sort Term]	
Price	0,00 INR	per	1	4	
Material Group	72000000	Cost Element]	
Purch. Group	101 🔍 1000	Vendor]	
Agreement	/	Info record]	
Recipient		Unloading Point			\Box ;
Requisitioner		Tracking Number]	,
Pl. Deliv. Time	Subcontr.	FW Order		1	- 1
	_				
0090 P	M_CME 1	L000 PM01			_
0100 P	M_CME :	L000 PM01			
0110 P	M_CME	L000 PM01			
	-	L000 PM01			
	-	L000 PM01			
	-	L000 PM01			
A b					

System will generate the below Message

Purchase requisition for service activity / element cannot be generated **Confidential Document** Copyright © 2018 Tech Mahindra. All rights reserved.

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You need to maintain Service Operations.

Select the operation, click on External, and maintain the data, same need to be done for the further activities, which are planned for tendering.

Plance Calibration/Statutory/Survey Maintenance 1000101: External Proc									
H 4 > H	100 Header da	ta Opera	ions Components	💱 🖆					
Order	Order 1000101 Activity 0030 / Ctrl key PM03								
StdTextKey/ShrtT	Text 🗌	Cal/Stat/S	urvey Maint by External	Vendor					
General	Internal Externa	I Dates	Act. Data Dry	Dock					
Operation qty	1	AU	Sort Term						
Price	60.000,00	INR	per 1						
Material Group	72000000		Cost Element						
Purch. Group	101 / 1000		Vendor						
Agreement	1		Info record						
Recipient			Unloading Point						
Requisitioner	MP00611268		Tracking Number						
Pl. Deliv. Time	Subcor	ıtr.	FW Order	/					
Services	Components R	elationships							
■ Line	D., Service No.	Short Tex		Quantity	lle	Gross Price	Crcy	Overf. Tol.	U Cost Elem
10	830000085		- Oil Bound Distemper	3		20.000,00	INR	oven. rol.	41300012
20		WU COats	- or sound bacemper	-	192	20.000,00	INR		
30							INR		
40							INR		
	4 1								—

Click on Header Data & Save it.

Order saved with number 1000101

Open the order again & go to Operation Tab and Select the Operation and Actual Data.

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Change C	Order: Ini	tial Scree	n	
Header data	Operations	Components	Costs	Addit
Order	[10	00101 <u></u> C	P	

PR is generated, now this need to be saved with tendering or Non Tendering.

Image: Composition of the second state of the second st	👼 Change Calibration/Statut	tory/Survey Maintenance 100	0101: General Op	era
StdTextKey/ShrtText Cal/Stat/Survey Maint by External Vendor General Internal External Dates Act. Data Dry Dock Completion confirmation Confirmation Confirmation Confirmation Confirmation No Remain. Work Forecast work O H Purchasing Requisition 2001000962 IO GR Qty 0.000	Header data Operations	Components 🛛 🔂 💼		
Confirmation 622 Actual work 0 H No Remain. Work Forecast work 0 Purchasing GR Qty 0.000	StdTextKey/ShrtText [Cal/Stat/Surve	y Maint by External Vendor		
Requisition 2001000962 10 B GR Qty 0.000	Confirmation 622			
Res./Purc. req. 3 Immediately PO Exists		GR Qty 0.000 PO Exists ✔ 📄		
Services Components Relationships	Services Components Relationships			
Image: Dr. Service No. Short Text Quantity Un Gross Price Crcy Overf. Tol. U Cost Element 10 8300000085 Two Coats - Oil Bound Distemper 3 M2 20,000.00 INR 0.0 41300012				

Purchase Requisition Creation MM Script

Go to Transaction Code ME52N and click on button to open the PR, which is generated from maintenance order.

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P	Change Pur	chase Req. 2001000962					
Do	cument Overview On 🛛 🗋	🎾 🖻 🔓 🚺 🖗 Personal Setting					
	ZZNB Standard PR	Select Document Purchase Requisition 200100096	2				
•		○Pur. Order			🚰 🚺 🚰 Def		
-	Stat. Item A I I IO F D	Purch. Requisition SRM Contract	Jantity		2 Delivery Date 0 31.12.2021	60,000.00 1 0	Material Group Construction S
		Other I	Document 🞇			0 0 0	
	< >			1 1			
F I	Item 1 [10] Cal/Stat/Survey Maint by External Vendor Valuation Account Assignment Source of Supply Versions Status Contact Person Texts Delivery Address Customer I						
	Select Custom Field List						
	 Data Fields 	O Email List	Terms & Condition	ons			
	Mode of Purchase	T Tender 💌	Purchase types				-

Enter the PR Number and press "Enter" for update for Tendering activity.

Plange Pur	chase Req. 20	01000962								
Document Overview On	🎾 🖻 🗗 🚳	Personal Setting								
Teader	Select Document Purchase Requisition	2001000962	×							
Stat Item A I 10 F D	 Pur. Order Purch. Requisition 		۲ در	antity	Unit C	2 Deliver	y Date	Fault Values Valn Price 60,000.00	Per	Material Group Construction S
	SRM Contract			1	/.0 0	51.12.0		00,000.00	0	construction 5
		Other D	ocument 🔀						0	
	Cal/Stat/Survey Maint by									
Valuation Accour	nt Assignment 🍸 Source	of Supply Ver	sions Status	r Ci	ontact P	erson	Texts	Delivery A	ddre	ss Customer I
Data Fields Mode of Purchase	OEmail L		Terms & Con Purchase types	nditior	15					•
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Go to customer data Tab, and fill the detail for Tender or Non Tender and Save the Purchase Req using Save Icon.

System will change Purchase requisition document & displays "Purchase Requisition 2001000962 Changed" message.

Purchase Requisition Approval (Workflow)

Login as Approver 1 (Assistant Engineer) in SAP System.

ট <u>U</u> ser S <u>y</u> stem	<u>H</u> elp
 Image: A start of the start of	🔻 🗧 I 😞 🚫 🕞 I 🖨 11
SAP	
New password	
Client	500
User	AE001
Password	*****
Logon Language	EN

Click on " SAP Business Workspace Button.

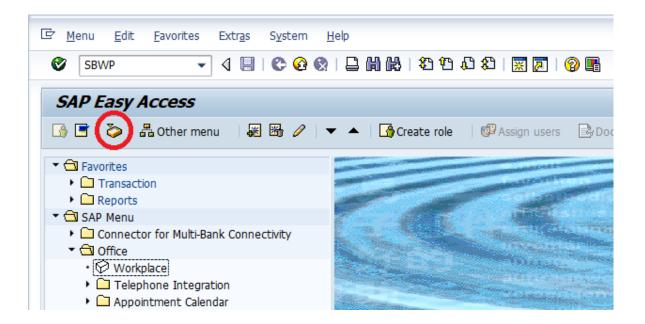
Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access \rightarrow SAP Menu \rightarrow Office \rightarrow Workplace

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Expand "Inbox" button, under workflow "Approve Purchase requisition 2002000962" message will appear.

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e	Title	Status	Work Item ID Creation Dat	e Creation Ti	P At	tta_ Co	or
>	Please approve the Purchase Requisition 2001000962	Ø	415071 23.07.2020	19:27:18	5		
· · ·	Please approve the Purchase Order 4000010071	Ø	415659 23.07.2020	13:04:49	5		
	Please approve the Purchase Order 4000010064	\Diamond	414818 22.07.2020	11:52:04	5		
>	Please approve the Purchase Requisition 2001000963	P	415320 20.07.2020	02:34:58	5		
	Please approve the Purchase Requisition 2001000963	\Diamond	414579 20.07.2020	02:33:46	5		
	Please approve the Purchase Requisition 2001000962	P	414487 19.07.2020	15:13:42	5		
	Please approve the Purchase Requisition 2001000962	Ø	414486 19.07.2020	15:13:02	5		
	Please approve the Purchase Requisition 2001000961	Ø	415262 19.07.2020	15:10:39	5		
>	Please approve the Purchase Requisition 2001000961	P	415261 19.07.2020	15:10:16	5		
6	Please approve the Purchase Requisition 2001000959	\Diamond	415260 19.07.2020	15:10:03	5		
>	Please approve the Purchase Requisition 2001000959	\Diamond	414485 19.07.2020	15:07:07	5		
6	Please approve the Purchase Requisition 2001000959	\bigotimes	414484 19.07.2020	15:06:38	5		
	H H					4	Ĺ
Please approve the Purchase Requisition 2001000962							
Description Objects and attachments							

Double Click on the "**Please Approve Purchase requisition 2002000962**" message. It will open the Purchase requisition document in Display mode.

Click on " 🧟 " **Back** Button. System will open Decision step in workflow screen.

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Decision Step in Workflow	
醫 Workflow [] Create 👔 Import	
Please approve the Purchase Requisition 2001000962	
Choose one of the following alternatives	
Approve Purchase Requisition	
Reject Purchase Requisition	
Display Purchase Requisition	
Approval or Rejection History	
Hold	
Description	Objects and attachments
Select one of the available decision options. This completes the processing of this step.	No attachments or objects exist
Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.	
If you choose Cancel, the user decision remains in your inbox for processing.	

Click on "Approve Purchase Requisition" Button to approve the Purchase Requisition.

Purchase Requisition will be approved with level 1.

Purchase Requisition Approval Request notification is forwarded to Approver 2

Login as Approver 2 (Executive Engineer) in SAP System.

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New password Client 500 User EE001 Password ********	Ø	
Client 500 User EE001 Password ********	SAP	
User EE001 Password ********	New password	
Password	Client	500
Password		
Logon Language EN	Password	*****
	Logon Language	EN

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Click on "SAP Business Workspace Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP					
Menu Path	Easy Access \rightarrow SAP Menu \rightarrow Office \rightarrow Workplace					
C Menu Edit Favorites Extras System Help						
SBWP	- 〈 三 ◇ ② ◎ 二 前時 む む む 黒 戸 ⑨ 🖫					
SAP Easy Ac	cess					
	Other menu 🛛 👪 🥒 🛛 🔻 🔺 🛛 😭 Create role 📄 🚳 Assign users 🛛 🗟 Doc					
▼ ☐ Favorites						
🕨 🎦 Transaction						
Reports						
🔻 🖾 SAP Menu						
	for Multi-Bank Connectivity					
 Office 						
• 🛇 Workplac						
	ne Integration					
Appointr	ment Calendar					

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3	$\textcircled{\label{eq:linear} \below \$					
Wo	rkflow 28					
Exe	Title	Status	Work Item ID Creation	Date Creation Ti	P Atta	
٠	Please approve the Purchase Order 4000010071	Ø	415659 23.07.2	020 13:04:49	5	
٠	Please approve the Purchase Order 4000010064	Ø	414818 22.07.2	020 11:52:04	5	
۹	Please approve the Purchase Requisition 2001000963	6	415320 20.07.2	020 02:34:58	5	
۹	Please approve the Purchase Requisition 2001000963	Ø	414579 20.07.2	020 02:33:46	5	
۹	Please approve the Purchase Requisition 2001000962	P	414487 19.07.2	020 15:13:42	5	
۲	Please approve the Purchase Requisition 2001000962	Ø	414486 19.07.2	020 15:13:02	5	
٠	Please approve the Purchase Requisition 2001000961	Ø	415262 19.07.2	020 15:10:39	5	
٠	Please approve the Purchase Requisition 2001000961	6	415261 19.07.2	020 15:10:16	5	
۹	Please approve the Purchase Requisition 2001000959	Ø	415260 19.07.2	020 15:10:03	5	
۹	Please approve the Purchase Requisition 2001000959	Ø	414485 19.07.2	020 15:07:07	5	
٠	Please approve the Purchase Requisition 2001000959	Ø	414484 19.07.2	020 15:06:38	5	
<u>ک</u>	Please approve the Purchase Requisition 2001000959	R	415258 19.07.2	020 15:05:51	5	

Please approve the Purchase Requisition 2001000962

```
Description
Select one of the available decision options. This
completes the processing of this step.
Before you make a decision, you can display the
attachments and objects which have been attached to
the user decision. You can also add your own
attachments
```

Double Click on the "**Please Approve Purchase requisition 2002000962**" message. System will open the Purchase requisition document in Display mode.

Click on " 🧟 " Back Button. System will open Decision step in workflow screen.

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Decision Step in Workflow	
🖼 Workflow 🖞 Create 😰 Import	
Please approve the Purchase Requisition 2001000962	
Choose one of the following alternatives	
Approve Purchase Requisition	
Reject Purchase Requisition	
Display Purchase Requisition	
Approval or Rejection History	
Hold	
Description	Objects and attachments
Select one of the available decision options. This completes the processing of this step.	No attachments or objects exist
Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.	
If you choose Cancel , the user decision remains in your inbox for processing.	

Click on "Approve Purchase Requisition" Button to approve the Purchase Requisition.

Purchase Requisition will be approved with level 2.

Purchase Requisition Approval Request notification is forwarded to Approver 3.

Login as **Approver 3** (Dy CME) in SAP System.

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⊡ <u>U</u> ser S <u>y</u> stem	Help
Ø	💌 🔍 🔄 完 😪 🔛 🛗 👘 👘 🏝 🎝 💭 💭 🔜 🔛
SAP	
New password	
Client	500
User Password	DYCME001
Logon Language	EN

Click on " SAP Business Workspace Button.

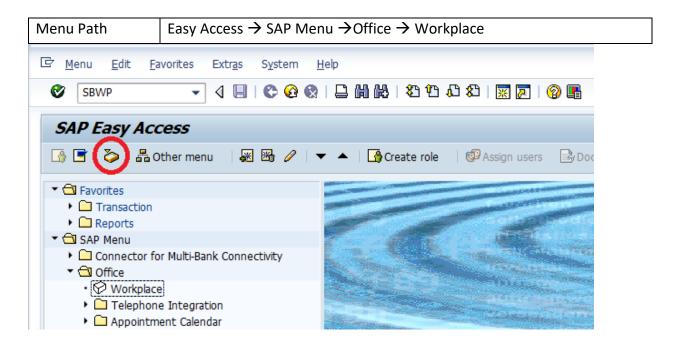
Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code SBWP

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Expand "Inbox" button, under workflow "Approve Purchase requisition 2002000962" message will appear.

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	◙♥≪®◎ ◙ॾॾ: !					
Exe	Title	Status	Work Item ID	Creation Date	Creation Ti	P At
•	Please approve the Purchase Requisition 2001000962	Ø	415074	23.07.2020	19:32:41	5
۲	Please approve the Purchase Order 4000010071	Ø	415659	23.07.2020	13:04:49	5
٠	Please approve the Purchase Order 4000010064	Ø	414818	22.07.2020	11:52:04	5
۹	Please approve the Purchase Requisition 2001000963	P	415320	20.07.2020	02:34:58	5
۰	Please approve the Purchase Requisition 2001000963	Ø	414579	20.07.2020	02:33:46	5
۹	Please approve the Purchase Requisition 2001000962	Ø	414486	19.07.2020	15:13:02	5
۰	Please approve the Purchase Requisition 2001000961	\heartsuit	415262	19.07.2020	15:10:39	5
۹	Please approve the Purchase Requisition 2001000961	P	415261	19.07.2020	15:10:16	5
۲	Please approve the Purchase Requisition 2001000959	\Diamond	415260	19.07.2020	15:10:03	5
۰	Please approve the Purchase Requisition 2001000959	Ø	414485	19.07.2020	15:07:07	5
٠	Please approve the Purchase Requisition 2001000959	Ø	414484	19.07.2020	15:06:38	5
۲	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51	5
	★ ▶ <u></u>					
🏸 Tips & tricks: Deadline M						
Ple	ease approve the Purchase Requisition	on 2001	000962			
Des	scription		Objects and atta	chments		
	lect one of the available decision options mpletes the processing of this step.	. This	No attachments o	or objects e	exist	
Ba	fore you make a decision you can display	the				

Before you make a decision, you can display the

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Double Click on the "**Please Approve Purchase requisition 2002000962**" message. System will open the Purchase requisition document in Display mode.

Click on " 🧟 " Back Button. System will open Decision step in workflow screen.

Please approve the Purchase Requisition 2001000962				
Choose one of the following alternatives				
Approve Purchase Requisition				
Reject Furchase Requisition				
Display Purchase Requisition				
Approval or Rejection History				
Hold				
Description	Objects and attachments			
Select one of the available decision options. This completes the processing of this step.	No attachments or objects exist			
Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.				
If you choose Cancel, the user decision remains in your inbox for processing.				

Click on "Approve Purchase Requisition" Button to approve the Purchase Requisition.

Purchase Requisition will be approved with level 3.

Purchase Requisition Approval Request notification is forwarded to Approver 4.

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CME001
EN

Login as Approver 4 (CME) in SAP System.

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Click on " SAP Business Workspace Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP						
Menu Path	Menu Path Easy Access \rightarrow SAP Menu \rightarrow Office \rightarrow Workplace						
C Menu Edit Eavorites Extras System Help							
SAP Fasy Acce	- < < < < < < < < < < < < < < < < < < <						
5 🖪 🕑 🖁 Oth							
 Favorites Transaction Reports 							
▼ 🔂 SAP Menu	Iulti-Bank Connectivity						
Workplace Workplace Telephone In Appointment							

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Expand "Inbox" button, under workflow "Approve Purchase requisition 2002000962" message will appear.

xe	Title	Status	Work Item ID	Creation Date	Creation Ti	P At
\$	Please approve the Purchase Requisition 2001000962	Ø	415080	23.07.2020	19:36:19	5
\$	Please approve the Purchase Requisition 2001000962	Ø	415077	23.07.2020	19:34:17	5
۵	Please approve the Purchase Order 4000010071	\heartsuit	415659	23.07.2020	13:04:49	5
۵	Please approve the Purchase Order 4000010064	\heartsuit	414818	22.07.2020	11:52:04	5
٧	Please approve the Purchase Requisition 2001000963	P	415320	20.07.2020	02:34:58	5
٧	Please approve the Purchase Requisition 2001000963	\heartsuit	414579	20.07.2020	02:33:46	5
٥	Please approve the Purchase Requisition 2001000961	\heartsuit	415262	19.07.2020	15:10:39	5
۵	Please approve the Purchase Requisition 2001000961	P	415261	19.07.2020	15:10:16	5
٥	Please approve the Purchase Requisition 2001000959	\heartsuit	415260	19.07.2020	15:10:03	5
<u>چ</u>	Please approve the Purchase Requisition 2001000959	Ø	414485	19.07.2020	15:07:07	5
٩	Please approve the Purchase Requisition 2001000959	\Diamond	414484	19.07.2020	15:06:38	5
۵,	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51	5

Please approve the Purchase Requisition 2001000962

Description	Objects and attachments
Select one of the available decision options. T completes the processing of this step.	his No attachments or objects exist
Before you make a decision, you can display the	

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Double Click on the "**Please Approve Purchase requisition 2002000962**" message. System will open the Purchase requisition document in Display mode.

Click on " 🧟 " **Back** Button. System will open Decision step in workflow screen.

Please approve the Purchase Requisition 2001000962	
Choose one of the following alternatives	
Approve Purchase Requisition	
Reject Purchase Requisition	
Display Purchase Requisition	
Approval or Rejection History	
Hold	
Description	Objects and attachments
Select one of the available decision options. This completes the processing of this step.	No attachments or objects exist
Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.	
If you choose Cancel , the user decision remains in your inbox for processing.	

Click on "Approve Purchase Requisition" Button to approve the Purchase Requisition.

Purchase Requisition will be approved with level 4. Once the Purchase requisition is approved by all 4 level approvers, a notification is triggered to Purchase Requisition Initiator and all preceding approvers.

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This will go for tendering work will be awarded and need to do Service Consumption

For Service Consumption need to execute MM Script of Service Consumption.

Portal Logon EBS Portal & SSO to SRM Portal

Access the URL URL https://10.9.7.22:8001/ebs-portal/ in IE browser. Below screen will be displayed.



Under "Port Users" tab provide your user-id and password.

Input the captcha as mentioned and then check the "Terms and Conditions" statement.

Click on "Submit" button.

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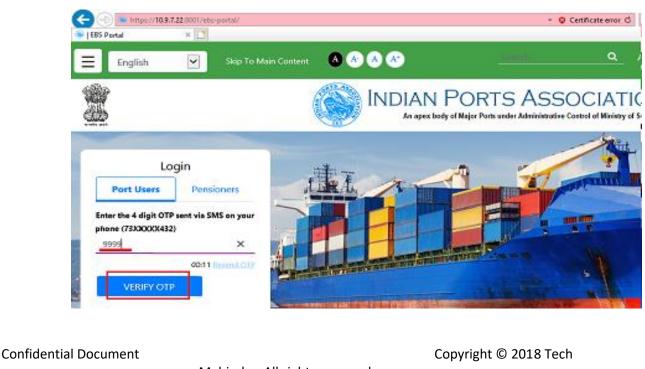






A new window will be displayed and it will prompt to enter the OTP. OTP will be sent to your registered mobile.

Input the OTP and click on "Verify OTP" button. Please see screenshot below.



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Once system verifies the OTP a new window will be displayed. Select "Other EBS Application" tab and click on "SRM Portal" link. Please see screenshot below.

🛞 Employe	ee Landing Page E	× 📑							
≣	English	•	Skip To Main Content	A A	A A*		٩	Home About Us Cont	tact Us 🛔 ADITI (Mumbai Port Trust)
entropy of the street					INDIAN POR An apex body of Major Po	TS ASSOC			SAGARMALA
EMPLOYEE PORTAL									
			SA	P Apps	General	Other Ebs Ap	plicat	ions	
			(¢		*		A	
				oyee Self ervice	DMS	Eoffice	-	SRM Portal	

A new window will be opened wherein you will be redirected to the SRM portal through SSO. The screen will be displayed as shown below.







			- A C	C 1	<u> </u>
	eq.portebs.com:50001/irj/porta		•	Search	₽- ☆ ☆ 🤃
Employee Landing Page E	× 27 Inbox - IPA SRM Portal	×			
		E - Procure	EMENT PORTAI	Ĺ	Log Off Welcome 10100020 (10100020) Login Time:19/07/2020 19:03.22 IST
Home Strategic Purchasing					
Overview					
Work Overview	The list of items shown I	nere could be outdated. Waiting for update			
Reports	Alerts Tasks	Notifications			
▼ Services	Show: New and In Progr	ess Tasks 💌 All 💌			¢ 7 (* E
Advanced Search	E Subject	Sent Date	⇒ Due Date	≟ Status	
					T

The screen contains the information of User id / Name and logon time at the right corner. The "Home" tab will be displayed on the left corner of the screen.

		E - Procur	REMENT PORTAL		Le Welcome 10100020 (1010 Time:19/07/2020 19:03.
tome Strategic Purchasing	9				
ork Overview ports Services	The list of items shown here could Alerts Tasks Notific Show: New and In Progress Tasks	ations			\$ F & D
Ivanced Search	E Subject	Sent Date	v ∣ Due Date	.≟ Slatus	

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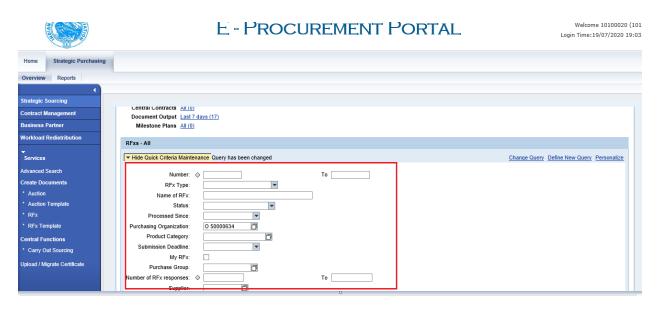


Strategic Purchasing

Select "Strategic Purchasing" tab then click on "Strategic Sourcing" link. At the right side panel, user will be able to see the list of RFx's with various status.

This is basically a dashboard where the user can view and act upon the tender's created using their userid's.

There are different search criteria's provided by system to search the Tender's created.



Home Strategic Purchas	sing
verview Reports	
•	
rategic Sourcing	
ontract Management	Strategic Sourcing
usiness Partner	
orkload Redistribution	▼ POWL E,
	Active Queries
Services	
vanced Search	RFxs AII(54) Saved (1) Availing Approval (34) Published (45) Completed (0) Release Rejected (0) Deleted (0)
eate Documents	Auctions All(3) Saved:0) Published:(1) Active:(0) Paused:(0) Ended:(0) Compated:(0) Sourcing Templates AllFax:(0) FFP(0) RFC(0) All Auctions(0) English Auction(0) Company Best Bid (0)
Auction	Central Contracts All (0)
Auction Template	Document Output Last7 days (17)
RFx	Milestone Plans <u>All (0)</u>
RFx Template	RExs - All
entral Functions	
	Show Quick Criteria Maintenance Query has been changed Change Query Define New Query Personalize
Carry Out Sourcing	View: [Standard View] 💌 Create RFx Copy Display Edit Delete Publish Responses and Awards Print Preview Refresh Export _ 2 /
load / Migrate Certificate	E RFx Number RFx Name Type Status RFx Category Purchasing Organization Submission Deadline Responses
	5100000162 Budgetary Offer ZEOI Awaiting Approval Mumbai Port Trust Purchase Organisation 17.07.2020 0
	510000161 Copy of 510000160 BSE Test ZLT2 Published Mumbai Port Trust Purchase Organisation 16.07.2020 0
	5100000160 Copy of 5100000144 - BSE Test ZLT2 Published Mumbai Port Trust Purchase Organisation 14.07.2020 0
	Stobbolistic Copy of Stobboli 44 - BSE Test ZE12 Published Multibal Port Hust Purchase Organisation 14.07.2020

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Carry Out Sourcing

To see the list of purchase requisition's replicated from the backend HANA system & create tender's against them, user need to go to Carry Out sourcing option. Follow below steps.

Select "Strategic Purchasing" tab then click on "Strategic Sourcing" link. Under "Central Function" click on "Carry Out Sourcing" link.

Steps would be as Strategic Purchasing \rightarrow Strategic Sourcing \rightarrow Central Functions \rightarrow Carry Out Sourcing.

Please see the screenshot below.

	E - PROCUREMENT PORTAL	weicome 10100020 (10100 Login Time:19/07/2020 19:03.22
Home Strategic Purchasing]	
Overview Reports		
•		
Strategic Sourcing		
Contract Management	Strategic Sourcing	Ξ,
Business Partner	▼ POWL	- 1
Workload Redistribution	* POWL	Ξ,
-	Active Queries	
Services Advanced Search Create Documents • Auction • Auction Template	RFxs All (54) Saved (1) Awaiting Approval (34) Published (48) Completed (0) Release Rejected (0) Deleted (0) Auctions All (3) Saved (0) Published (1) Active (0) Paused (0) Ended (0) Completed (0) Sourcing Templates All FX:s(0) RFP (0) RFQ (0) All Auctions (0) Endelsh Auction (0) Company Best Bid (0) Central Contracts All (0) Document Output Last 7 days (17) Document Contracts All (0)	
• RFx	Milestone Plans <u>All (0)</u>	
RFx Template	RFxs - All	
Central Functions Carry Out Sourcing Upload / Migrate Certificate		Change Query Define New Query Personalize
	Name of RFx:	

A new window will get displayed as shown below. This is the first step of searching the Purchase requisitions. There are various search criteria's provided through which you can search the purchase requisitions.

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Assign Sources of Supply: Step 1 (Select Req	uisition)				
Previous Next Close System Info Create Memory Snaps	hot				<u> </u>
Select Requisition Assign Sources of Supply (No Items)	3 4 Review Drafts (No Items) Summary Screen (N	No Documents)			
▼ Search Criteria: Requisitions					
Number of Requisition:	Name of Requisition:		Settings		
Item Description:	Product Category:				
Product:	Supplier:	đ			
Requester:	External Requirement:				
Purchasing Organization:	Account Assignment Category:	•			
Purchasing Group:	Account Assignment Number:	đ			
Priority:	Intended for Grouping:				
Delivery Date Range:	Include Locked Items:				
Delivery Date: To:					
Search					
Select All Expand Collapse Hide Subordinate Outlines	Reject Items				Filter Settings
B Requisition / Item Number Description Category	Priority Quantity Unit Requester	Delivery Date Supplier Number	Supplier Name Contract	Info Record Exte	ternal Item Number Logical System 🔄

If you know the PR number, then enter SAP Purchase Requisition in "**External Requisition**" field and click on "**Search**" button. Purchase Requisition Line items shows below

													opiono
Assign Sources of Su	pply: Step 1 (Sele	ect Requisition)											
	System Info Create Men	· · ·											0
l∳1	2	3		4		-	(
Select Requisition	Assign Sources of Supply (N	lo Items) Review Drafts (No Items)	Summary S	Screen (N	o Documen	its)							
 Search Criteria: Requisitions 	3												
Number of Requisition:			Requisition:				_		Settings				
Item Description:		Produ	ct Category:			Ó	1						
Product:	đ		Supplier:			ī	1						
Requester:	D		equirement:	20010009	962								
Purchasing Organization:	đ	Account Assignme	nt Category:			•	·						
Purchasing Group:	đ	Account Assignme	ent Number:			Ō	1						
Priority:	•	Intended for	or Grouping: [
Delivery Date Range:	•		cked Items: [
Delivery Date:	To:	6 7											
Search													
Select All Expand Collap	se Hide Subordinate Ou	tlines All Categories	Reject Items	5									
Requisition / Item Number	Configurable Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	External Item Number
▼ ☐ 200000163/1	0001	Cal/Stat/Survey Maint by External Vendo	r 7200000		1	AU	PI_USER	From 31.12.2021					2001000962/00010
• 🎲 <u>2000000163/2</u>	0001.AA	Two Coats - Oil Bound Distemper	72000000		3	M2	PI_USER	From 31.12.2021					2001000962/00010

Click on "Select All" button and click on "Next" button.

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Assign Sources of Supply: Step 1 (Select Requisition)						
Previous Next Close System Info Create Memory Snapshot						2
Select Requisition Assign Sources of Supply (No Items) Review Drafts (No Items)	4 Summary Screen (No Docu					
▼ Search Criteria: Requisitions						
Number of Requisition: Name o	Requisition:		Settings			
Item Description: Produ	ict Category:	Ð				
Product:	Supplier:	ð				
	Requirement: 2001000962					
Purchasing Organization: Account Assignment	nt Category:	¥				
Purchasing Group: Account Assignm	ent Number:	D.				
Priority: Intended	ior Grouping: 📃					
	ocked Items:					
Delivery Date: To:						
Search						
Select All Expand Collapse Hide Subordinate Outlines All Categories	Reject Items					
Requisition / Item Number Configurable Item Number Description	Category Priority Quan	ntity Unit Requester D	elivery Date Supplier Number	Supplier Name Contract	Info Record External Item Nu	umber
Cal/Stat/Survey Maint by External Vend	or 72000000	1 AU PI_USER FI	rom 31.12.2021		2001000962/00	010

Once you click on "**Next**" button, system will direct to next step#2 of selecting the Draft document to be created.

Once again click on "Select All" button to ensure all the PR's and line items are properly selected.

Then click on the "Create Draft" button and select "RFx" from the drop down list as shown in below screenshot.

-		ssign Sources of S	Supply (1 Items)))									_
Previous Next 🕨 Save	System into	Create memory Shapshot											
1	2		3	4									
				4									
Select Requisition	Assign Sources of Sup	oly (1 Items) Review Dr	rafts (No Items) Summ	ary Screen (No E	Documents))							
Select All Expand All C	nllanse All Channe Re	fresh Propose Sources	of Supply Create Draft	Replace Item	n with Catal	log Item / Undo Rep	lacement	Submi	to Groun	ing Remov	e I Assian to My	Purchasing Grou	ID
		fresh Propose Sources	DEv	Replace Iten		log Item 🖌 Undo Rep				oing Remov		Purchasing Grou	
Requisition / Item Numbe	r External Item Number	Configurable Item Number	Descripti Auction		Variant	Category Description		Quantity	Unit D	elivery Date	e Assign to My Supplier Number		
			RFx		Variant			Quantity	Unit D				
Requisition / Item Numbe	r External Item Number	Configurable Item Number	Descripti Auction		Variant	Category Description		Quantity	Unit D	elivery Date			
Requisition / Item Numbe	r External Item Number	Configurable Item Number	Descripti Auction		Variant	Category Description		Quantity	Unit D	elivery Date			
Requisition / Item Numbe	r External Item Number	Configurable Item Number	Descripti Auction		Variant	Category Description		Quantity	Unit D	elivery Date			
Requisition / Item Numbe	r External Item Number	Configurable Item Number	Descripti Auction		Variant	Category Description		Quantity	Unit D	elivery Date			
Requisition / Item Numbe	r External Item Number	Configurable Item Number	Descripti Auction		Variant	Category Description		Quantity	Unit D	elivery Date			
Requisition / Item Numbe	r External Item Number	Configurable Item Number	Descripti Auction		Variant	Category Description		Quantity	Unit D	elivery Date			
Requisition / Item Numbe	r External Item Number	Configurable Item Number	Descripti Auction		Variant	Category Description		Quantity	Unit D	elivery Date			

Once you click on "Next" button, system will direct to next step#3 of selecting the Transaction Type for the tender to be created.

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From the drop down list select "ZAT1 – Adv/Open Tender 1 Env" option.

Previous Next 🕨 Process A	II Drafts Close Process Selec	ed Drafts Edit Selected Drafts Sys	tem Info Create	Memory Snaps	not							
1	2	3	4		H i							
Select Requisition Assig	n Sources of Supply (No Items)	Review Drafts (1 Items) Sur	nmary Screen (No	Documents)								
Created Drafts												
Change Selected Draft To 🖌 Re	move											
Draft Name		Draft Type	Supplier Numbe	er		Su	pplier	Transactio	on Type			
10100020 22.07.2020 15:31:01		Bid Invitation						I				
									/Opn Tender /Opn Tender			
									/Budgetary of			
									ited Tender 1			
									ited Tender 2	Env		
Details of Selected Drafts 1	0100020 22.07.2020 15:31:01							ZSTI : Sing	le l'ender			
Remove Expand All Collapse	All											
Requisition / Item Number	Configurable Item Number	Description		Category	Quantity	Unit	Info Record	Net Price			Gross Price	Curre
	0001	Cal/Stat/Survey Maint by Externa	al Vendor	72000000	1	AU					0.00	INR
▼ <u>2000000163 / 1</u>						M2			000.00 per	1 M2	20,000.00	

Once the tender type is selected, click on the "Edit Selected Drafts" button as shown below.

revious Next Next Process Al	I Drafts Close Process Select	ed Drafts Edit Selected Drafts Sys	stem Info Create N	lemory Snapsh	ot							
Select Requisition Assig	2 n Sources of Supply (No Items)	Review Drafts (1 Items) Sur	4 mmary Screen (No I	Documents)	4							
Created Drafts												
Change Selected Draft To 🖌 Re	move											
Draft Name		Draft Type	Supplier Number	r		Su	pplier	Tra	nsaction Type			
10100020 22.07.2020 15:31:01		Bid Invitation						ŻAT	1 : Adv/Opn Tender	1 Env		
Details of Selected Drafts 10	100020 22.07.2020 15:31:01											
Remove Expand All Collapse	All											
Requisition / Item Number	Configurable Item Number	Description		Category	Quantity	Unit	Info Record	Net Price			Gross Price	Curre
	0001	Cal/Stat/Survey Maint by Extern	nal Vendor	72000000	1	AU					0.00	INR
• 🙀 200000163/2	0001.AA	Two Coats - Oil Bound Distemp	er	72000000	3	M2			20,000.00 per	1 M2	20,000.00	INR

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A new window will get opened with all the details required for RFx creation.

Details are explained in next section#4 – **RFx Creation**. Simultaneously system will automatically move to next step#4. Click on the "Close" button to close this screen.

mmary Screen: Step	<u>4 (Summary Screen</u>	1 Documents)					
	Close System Info Create M						
1	2	34					
Select Requisition As	sign Sources of Supply (No Items)	Review Drafts (No Items) Summary Screen 1 De	cuments				
		······					
Created Objects							
Created Objects							
	Document Type	Description	Status	Supplier Number	Supplier Name	Total Value	Currency
	Document Type RFx	Description 10100020 22 07 2020 15 31:01	Status Saved	Supplier Number	Supplier Name		Currency
Document Number				Supplier Number	Supplier Name		
Document Number				Supplier Number	Supplier Name		
Created Objects Document Number 5100000185				Supplier Number	Supplier Name		

RFX Creation - Edit RFx RFx Parameters

The RFx screen will be in Edited mode. The RFx number will get generated automatically and it is an incremental unique number generated by system. The panel at the top displays the RFx number, RFx Name (40 characters), type of RFx and created by & creation date and time information. Please see the screenshot below.

	Options
Edit RFx :	Open side panel
Read Only Close Technical RFx Permissions Publish Save Check Export Print Preview Delete Maintain Rfx Parameter Import System Information Create Memory Snapshot Related Links 🖌	0
RFx Number Status Save Created On 22.07.2020 Status Status Save Created On Status Save Save	
RFX Information Bidders Items Notes and Attachments Weights and Scores Approval Tracking	

The RFx name is defaulted by system in the format of "User Id, Date, Time". The RFx Name can be modified if required by the Tender Creator with some meaningful short description of the tender.

Please see the screen shot below.

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			Opti
Edit RFx :			Open side p
	Permissions Publish Save Check Export	Print Preview Delete Maintain Rfx Parameter Import System Informati	
		dv/Opn Tender 1 Env Status Saved Created On 22.07.2020 15:38 rssion Type Active Version External Version Number	46 Created By ADITI SHENDYE Time Zone INDIA
RFX Information Bidders	Items Notes and Attachments Weigh	ts and Scores Approval Tracking	
RFx Parameters Questions N	otes and Attachments		
Identification		Event Parameters	
RFx Name:	10100020 22.07.2020 15:31:01	Currency:	INR 🖸
Port Tender No:		Target Value:	60,000.00 INR
		Detailed Price Information:	Simple Price
Tender Description:		Follow-On Document:	Purchase Order or Contract
DE: Trees	Adv/Opn Tender 1 Env	Bidder Can Change RFx Responses:	✓ AMC
Publication Type:	· · · · · · · · · · · · · · · · · · ·	Allow Multiple RFx Responses for Each Company:	V
Publication Type:	Public RFX V	Display Weighting to Bidders:	Percentag
Organization			
Purchasing Organization:	Mumbai Port Trust Purchase Organisation	Tender Fee	Security Deposit
Purchasing Group:	Material Mgmt Purchase Group Sh	ow Members	* Security Deposit Required:
			* Security Deposit Percentage:
Dates		Required:	
RFx Start Date:	00:00:00		
* RFx Submission Date:	00:00:00	Earnest Money Deposit	
Price Rfx Opening Date:	00:00:00		
Technical RFx Response Opening Date:	[] 00:00:00	Required:	
End of Binding Period:		Press (s EUD Evelories	
		* Reason for EMD Exclusion:	
Valid From / To:	6 - 6	Scenario Award/Contract	
		Pre-hid Meeting	

There are various fields provided on the RFx screen as below. Details description of the fields available for maintaining the data is given in table below.

Identificatio	n	
Field	Description	Field Status
Port Tender No	Enter the internal port tender number followed by the respective Port.	Editable
Tender Description	This is 256 character in length. Used for entering the long description of the Tender	Editable
RFx Type	Type of Tender	Non-Editable
Publication Type	System Defaulted – Restricted RFx	Editable
Organization		
Purchasing Organization	System defaulted	Non-Editable

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Purchasing Group	System Defaulted	Non-Editable
Dates		
RFx Start Date	Date from which the Tender process will start after it is approved and published	Editable
RFx Submission Date	Date by which the Bidder should submit the response	Editable
Price Rfx Opening Date	RFx Price Opening Date	Editable
Technical RFx Response Opening Date	RFx Technical Opening Date	Editable
Valid From / To	Binding period of the tender	Editable
Event Param	leters	
Currency	System Defaulted as INR. Not to be changed	Editable
Target Value	System defaulted based on the estimates in the Purchase requisition. Not to be modified.	Editable
Detailed Price Information	System defaulted. Not to be changed	Editable
Follow-on Document	Defaulted by system. The document to be created i.e. either a Purchase Order or Contract against the L1 bidder response. Not to be changed.	Editable
Bidder can change RFx Response	Will be checked by default. This allows the bidder to change the submitted responses until the RFx submission deadline date is not reached. If unchecked, response once submitted cannot be modified by the Bidder. Not to be changed.	Editable
Allow multiple RFx Response for each company	Will be checked by default. This allows the bidder to change the submitted responses multiple times, until the submission deadline date is not reached. If unchecked, Bidder cannot modify & re-submit the responses. Not to be changed.	Editable
AMC Indicator	Is applicable for the AMC tenders. If checked TCR with ALR/AVR will be generated	Editable

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QSBC	Currently not available	Editable
Tender Fee	Check this field if tender fee needs to be collected from the	Editable
Required	Bidder	
Tender Fee	Enter the percentage of amount to be collected from the	Editable
Percentage	Bidder. System automatically calculates the tender fee and	
	displays in the Tender Fee field	
Tender Fee	Buyer can input the amount here instead of entering the %	Editable
Submission	Tender Fee is required to be submitted before this Date and	Editable
Deadline	Time by the Bidder without which the Bidder will not be able	
	to create & submit the responses	
Earnest Mon	ney Deposit	
Required	Check this field if EMD fee needs to be collected from the Bidder	Editable
EMD Percentage	Enter the percentage of amount to be collected from the Bidder. System automatically calculates the EMD fee and	Editable
rereentuge	displays in the EMD Fee field	
Amount	Buyer can input the amount here instead of entering the EMD %	Editable
Submission	EMD Fee is required to be submitted before this Date and	Editable
Deadline	Time by the Bidder without which the Bidder will not be able to create & submit the responses	
Pre-Bid Mee		
Pre-Bide	Check this box if pre-bid meeting needs to be conducted with	Editable
Meeting	the Bidders.	
Required		
Pre-Bid Start	Provide the start date & time for the pre-bid meeting to be	Editable
Date & Time	started	
Pre-Bid End	Provide the end date & time for the pre-bid meeting	Editable
Date & Time	discussion	
Pre-Bid	Location of the meeting that was held.	Editable
Location		
Pre-Bid	Mention the concluded points in the column. This is 256	Editable
Remarks	characters in length.	

We are creating this tender for AMC. So check the "AMC Indicator" field as shown below.

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	ame 10100020 22.07.2020 15:31:01 umber of Items 1 Version Number	Type Adi/Opn Tender I Env Status Saved Created On 22.07.2020 15:38:46 Created By ADITI SHENDYE Time Zone INDIA Version Type Adi/ve Version External Version Number	
RFX Information Bidders	Items Notes and Attachments	Weights and Scores Approval Tracking	
Parameters Questions I	Notes and Attachments		
cation		Event Parameters	
RFx Name:	10100020 22.07.2020 15:31:01	Currency: INR	
Port Tender No:	MBPT/2020/07/2201	Target Value: 60,000.00 INR	
Tender Description:	THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.	Detailed Price Information: Simple Price IV Follow-On Document: Purchase Order or Contract IV Bidder Can Change RFX Reasonss: V	AMC Indicator: 🔽
DEv Turner	Adv/Opp Topdar 1 Epv	bidder Gan Ghange Krx Responses: 🗹	and indicator.

Enter all the applicable details required for the tender to be published.

			Optio
Edit RFx :			Open side p
	Permissions Publish Save Check Exp	oort Print Preview Delete Maintain Rfx Parameter Import System Information Create Memo	
			,, ,, , ,, , ,, , , , , , , , , , , , , , , , , , , ,
	me 10100020 22.07.2020 15:31:01 Typ nber of Items 1 Version Number	e Adv/Opn Tender 1 Env Status Saved Created On 22.07.2020 15:38:46 Created Version Type Active Version External Version Number	By ADITI SHENDYE Time Zone INDIA
RFX Information Bidders	Items Notes and Attachments W	eights and Scores Approval Tracking	
RFx Parameters Questions N	otes and Attachments		
Identification	(0100000 00 07 0000 15 01 01	Event Parameters	
RFx Name:	10100020 22.07.2020 15:31:01	Currency: INR	
Port Tender No:		Target Value: 60,	000.00 INR
		Detailed Price Information: Simple Price	v
Tender Description:		Follow-On Document: Purchase Order o	Contract
RFx Type:	Adv/Opn Tender 1 Env	Bidder Can Change RFx Responses:	AMC
Publication Type:		Allow Multiple RFx Responses for Each Company:	
Tubication Type.		Display Weighting to Bidders:	Percentage
Organization			
Purchasing Organization:	Mumbai Port Trust Purchase Organisation	Tender Fee	Security Deposit
Purchasing Group:	Material Mgmt Purchase Group	Show Members	* Security Deposit Required:
			* Security Deposit Percentage:
Dates		Required:	
RFx Start Date:	00:00:00		
* RFx Submission Date:	00:00:00	Earnest Money Deposit	
Price Rfx Opening Date:	00:00:00	Required:	
Technical RFx Response Opening Date:	00:00:00		
End of Binding Period:	5	* Reason for EMD Exclusion:	
Valid From / To:	.	Scenario Award/Contract	
		Pre-bid Meetina	

Click on the "Check" button. Any errors will be displayed in red color as highlighted below.

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											Options
Edit RFx :											Open side par
Read Only Close Technical RFx	Permissions Pul	blish Save Check	Export Print Preview	Delete Maintain R	Rfx Parameter	Import System Inform	ation Cr	reate Memory Snapsho	Related Links	4	
Enter the submission deadline											
Please Provide Reason for EMD Exclusi	ion										
Please maintain Rfx Parameter !!!											
\Lambda No permissions maintained for price ope	ner										
A No nermissions maintained for technical	onener										
	me 1010002022. nber of Items 1	07.2020 15:31:01 Version Number	Type Adv/Opn Tender 1 Version Type Act		Saved Creaternal Version M	ated On 22.07.2020 15 lumber	:38:46	Created By ADITI	SHENDYE	îime Zone INDIA	
RFX Information Bidders	Items Note	es and Attachments	Weights and Scores	Approval Tr	acking						
RFx Parameters Questions No	otes and Attachmer	nts									
Identification				Event P	arameters						
RFx Name:	10100020 22.07.2	2020 15:31:01				Currenc	y: INR	ī			
Port Tender No:						Target Valu	e:	60,000.00 IN	R		
					[etailed Price Informatio	n: Simple	e Price 💌	•		
Tender Description:						Follow-On Documer	it: Purcha	ase Order or Contract	•		
DC- T	Adv/Opn Tender	1 Eau			Bidder Can	Change RFx Response	s: 🖌				AMC Inc
RFx Type: Publication Type:				Allow Mu	ultiple RFx Resp	onses for Each Compan	y: 🔽				
Publication Type.		•			Disp	olay Weighting to Bidder	s: 🗌				Percentage E
Organization											
Purchasing Organization:	Mumbai Port Trus	st Purchase Organisation	n	Tender	Fee					Security I	
Purchasing Group:	Material Mgmt Pu	rchase Group	Show Members								rity Deposit Required
										* Security	Deposit Percentage:

Bidders Tab

For Advertisement / Open tender's, Buyer will not be required to add the Suppliers. It is not mandatory requirement. However, there is a provision to add the Bidder's for such type oftender's as well and Buyer needs to take appropriate decision with regards to this.

Under the "Bidders" tab, Buyer would be able to add the bidder id. Buyer can either provide the Bidder id directly and then click on "Add" button.

uyer also can click on "Search for Bidder" button to search the Bidders to be invited for the tendering activity.

	RFX Information Bidders	Items Notes a	nd Attachments	Veights and Scores App	Tracking					
		items Notes a	nd Attachments	veights and Scores App	Tracking					
	Bidder Overview Add Bidder by Company ID 4000442	Add	Search for Bidders	L Send Notifications O	utput Medium Delete		Settings			
	Company Name	Contact	Country	Company ID	Bidder Contact Person	Phone Number	Output Medium			
	to company runio	Contact	oounny	company to	Didder Contact + Croon	Those Hermon				
			_							
	 Bidder Currencies 									
	* Currency: INR Currency Conversion Date: 10 Following is a list of currencist kina can be used by the bidder. You can add more currencies or set the main currency from the list.									
	Following is a list of currencies that can b	e used by the bidders.	You can add more curr	encies, delete currencies or s	et the main currency from the list.					
	Add Currency Set Main Currency	Delete								
	Currency		Description							
	INR		Indian Rupe	e						
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		Mak	indra A	ll rights ros	anuad					
		IVIdi	inura. A	ll rights res	erved.					
Accepting	g No Limits		Iternati	ive Thinki	no	Driving Positive Cha	ange			
	0									
						Pa	age 55 of 210			





New confirmation window will be displayed and system will prompt for confirmation. Click on "Ok" button.

Edit RFx :										
Read Only Close Technical RFx	Permissions Publish	Save Ch	eck Export Print Prev	ew Delete M	laintain R	fx Parameter Import	System Inform	mation Crea	te Memory Snapshot R	telated Links 🖌
	me 10100020 19.07.202 Number Version		Type Single Tende ve Version External	r Status S Version Numbe		Created On 19.07.2	020 19:56:18	Created I	By ADITI SHENDYE	Time Zone INDIA Nu
RFX Information Bidders	Items Notes an	d Attachme	ents Weights and Sco	res Approv	al T	acking				
▼ Bidder Overview										
Add Bidder by Company ID: 40000442	Add	Search fo	r Bidders 🖌 📔 Send Not	fications Output	ut Medium	Delete				
B Company Name	Contact	Country	Company	D	Bid	der Contact Person			Phone Number	Output Medium
			Add Bidders						×	
			B Organization Name	Company ID	DUNS	Business Partner ID	Last Name	First Name		
			FELIX ENGG. CO.	40000442		200	ENGG. CO.	FELIX		
									-	
								OK Cancel		
▼ Bidder Currencies										
* Currency: INR	Currency Conversion E)ate:	E2							
Following is a list of currencies that can	be used by the bidders. Yo	ou can add	more currencies, delete c	irrencies or set th	he main c	urrency from the list.				
Add Currency Set Main Currency	Delete									

Bidder id will get added as shown in screen shot below.

RFX Information Bidde	ers Items Notes and Attachment	s Weights and Sco	res Approval Trac	sking							
Bidder Overview							Ē				
Add Bidder by Company ID: Add Search for Bidders A Send Notifications Output Medium Delete Settings											
Company Name	Contact	Country	Company ID	Bidder Contact Person	Phone Number	Output Medium	4				
FELIX ENGG. CO.	FELIX ENGG. CO.	IN	<u>40000442</u>	200	123456789	Mail					

Maintain RFx Parameters

It's mandatory to maintain RFx parameters for any of the tender type.

Click on the button "Maintain RFx Paramter" as shown below.







										Optio
Edit RFx :										Open side pa
Read Only Close Technical RF:	x Permissions Publish Save Check	Export Print Preview Delete	Maintain Rfx Parameter	Import System	Information	Create Memory	Snapshot	Related Links ,	4	
	Name 10100020 22.07.2020 15:31:01 T lumber of Items 1 Version Number	Type Adv/Opn Tender 1 Env Version Type Active Version		ated On 22.07.20 Number)20 15:38:46	Created By	y aditi she	ENDYE TI	me Zone INDIA	l
RFX Information Bidders	Items Notes and Attachments	Weights and Scores Approv	al Tracking							
RFx Parameters Questions	Notes and Attachments									
entification RFx Name: Port Tender No:]	vent Parameters		ency: INR	0				
Tender Description:	THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.			Target V stailed Price Informa Follow-On Docur	ation: Simpl ment: Purch	e Price	.00 INR	•		
RFx Type: Publication Type:		ļ	Allow Multiple RFx Respo	Change RFx Respo nses for Each Comp ay Weighting to Bid	pany: 🗹				ſ	AMC Indicator: ✓ QSBC: □ Percentage Bidding: □
ganization Purchasing Organization: Purchasing Group:	Mumbai Port Trust Purchase Organisation Material Mgmt Purchase Group	Show Members	ender Fee					* S	ri ty Deposit iecurity Deposit F curity Deposit Per	
ıtes RFx Start Date:	22.07.2020			Requ Tender Fee Percen	uired: 🗹 itage: 2					

A new screen will be displayed. User can either add his own questionnaires or it can be selected from the available repository. Click on "Import" button to select questions from available repository. A new window will get displayed. Select multiple questions and then click on "Transfer" button.

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SAP User Manual for Calibration/Statutory/Survey Maintenance

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	_		n to mai	ntain Qu	× 📑						
۲ł	Bid N		0000185				<		المعالم المعالم المعالم المعالم	_ ش	□ × ☆ ∰ 🤩
jani		d Row	save	Quest Delete	Close	Import] -		lication to maintain Qu × 🖸		
	Ē	S.No	Group			Que	stic	Back	Please select data to be imported Transfer		
tes		2					_		Question	Group	Attachme
		3					h		IO YOU HAVE PREVIOUS WORK EXPERIENCE. UPLOAD DOCUMENTS. JOU YOU HAVE PAN NO	Eligibility Criteria Eligibility Criteria	No No
hni		5							YOU YOU HAVE TAN NO. N LAST 7 YEARS, EXPERIENCE OF 3 COMPLETED PURCHASE ORDERS OF MINIMUM 4 LAKHS ATTACHED?	Eligibility Criteria Eligibility Criteria	
		7							VHETHER ANNUAL AVERAGE TURN OVER FOR LAST 3 YEARS IS ABOVE RS.10/15/50* LAKIS	Eligibility Criteria	
		8 9					h		VHETHER BIS LICENSE HOLDER VHETHER DOCUMENTS FOR START UP ATTACHED?	Eligibility Criteria Eligibility Criteria	
		10					Ľ	٧	VHETHER DOWN LOADING CHARGES OF RS.105/- PAID	Eligibility Criteria	

Click on "Save" and then click on "Close" button to close the window. Please see screenshot below.

2	NP I		Application to maintain Question	
I N	o: 510	0000185		
		aintain Question		
Ad	d Row	Save Delete Close	Import	
	S.No	Group	Question	Attachment Required
	1	Eligibility Criteria	WHETHER DOCUMENTS FOR START UP ATTACHED?	Yes 🗸
	2	Eligibility Criteria	DOU YOU HAVE PAN NO	No \checkmark

Data once saved, below system message will be displayed.

All	✓ 1
~	Data Store successfully

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Maintain Tender Committee

In this section we will see how the tender committee is maintained and will be responsible for performing the technical and commercial scrutiny and evaluation activities.

We have different roles defined in system that decides the activity to be performed by the individual user's.

Click on "Permission" button and add user-ids under the Tech Scrutiny, Price Opener, Tech Evaluator, Price Scrutiny and Price Evaluator roles

Since this is as open tender single envelope bid, we do not require to maintain the technical opener. The "Technical Opener" column is in display mode. System by default will consider the tender creator as an technical opener.

	lame 101000203 umber of Items			//Opn Tender 1 E ion Type Active		Saved Created External Version Num	IOn 22.07.2020 Iber) 15:38:46 C	reated By ADITI SH	ENDY	E Time Zone INDIA
RFX Information Bidders	Items	Permissions								×	
x Parameters Questions	Notes and Attack	Permis	ssions								
	10100020 22.07 MBPT/2020/07/		0100020 22.07.202	0 15:31:01 RFx I	No. 510000018	5					
Tender Description:	THIS PLACE H TO CAPTURE DESCRIPTION FIELD LENGTH	Add Delete	_	Tesh Oserfau	Dia Orașe	Technical Fachadas	Drive Overfilm	Die Freister	Did Fires Admin		
	Adv/Opn Tende	User 10100020		Tech Scrutiny	Price Opener	Technical Evaluator	Price Scrutiny	Price Evaluator	Bid Floor Admin.		
Publication Type:	Public RFx										Per
nization											
Purchasing Organization:											Security Deposit * Security Deposit Req
Purchasing Group:	Material Mgmt F	User Details									* Security Deposit Percer
RFx Start Date:		User Name Building			Organization Room		_	npany			
* RFx Submission Date: Price Rfx Opening Date:											
nical RFx Response Opening Date: End of Binding Period:		2 10:00:00 2			Earnest	Money Deposit					

Once you click on "Add" button, Buyer needs to provide the user id and the then click on the "Search" button. System will display the user details. Select the row and then click on "Transfer" button. Please see screenshot below.

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	sions							
Fx Name 10	100020 22.07.2020) 15:31:01 RFx M	No. 510000018	5				
	Window							
	n Assignment							
dd Delete	Taskalad Osaasa	Tech Condinu	Drive Orecord	Technical	-	Drive Courtinu	Drive Durchuster	Did Flags & date
	Technical Opener							
10100020								۲
er Details								
User Name [Organization [] . Com	npany	
Building			Room				pany	
ld User								
	00011	_						
a Name 100	00011	_						
er Name: 101 st Name:								
st Name: st Name:								
st Name: st Name: sarch								
st Name: st Name: sarch ser Details								
st Name: st Name: sarch			User ID	Person ID	Employe	e ID E-Mail	Department	Position Name
st Name: st Name: sarch ser Details	Last		User ID 10100011	Person ID 00000000	Employe	e ID E-Mail	Department 0000000	Position Name
st Name: st Name: arch ser Details					Employe	e ID E-Mail		Position Name

User will be visible in the Permission tab as shown below.

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Permis	ssions						
Fx Name 1	0100020 22.07.2020) 15:31:01 RFx N	lo. 510000018	5			
Save Clos	e Window						
ser Permiss	ion Assignment						
dd Delete							
User	Technical Opener	Tech Scrutiny	Price Opener	Technical Evaluator	Price Scrutiny	Price Evaluator	Bid Floor Admin.
10100020							۲
10100020							0
10100020		v					
		V					~

Similarly, Buyer can add multiple users in the Permission tab and assign appropriate roles for performing the activities in SRM. After adding the user's & assigning respective roles the permission tab details will look like below.Please refer below table for the roles and its functionality.

Permission T	ab (Tender Committee)	
Role Name	Role Description	Field Status
Bid Floor Admin	This role is assigned by default to the user creating the Tender i.e. the Buyer. Its recommended not to change	Editable
Technical	User assigned under this role is responsible for opening the	Non-Editable
Opener	technical responses received. In Single Tender process, system will default this role to the Buyer creating the tender.	
Tech	User's responsible for performing the technical scrutiny	Editable
Scrutiny		
Technical	User's responsible for performing the evaluation or reviews	Editable
Evaluator	on the details submitted by the scrutiny team	
Price	User's responsible for performing the Price opening of the	Editable
Opener	tender's once it is initiated by the Bid Floor Admin	
Price	User's responsible for performing the price scrutiny	Editable
Scrutiny		
Price	User's responsible for performing the evaluation or reviews	Editable
Evaluator	on the details submitted by the scrutiny team	

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x Name 1010002	0 22.07.2020 15:31:01 RFx	No. 5100000185					
Close Wind	ow						
ermissions update	d successfully						
r Permission Ass	ignment						
d Delete							
User	Technical Opener	Tech Scrutiny	Price Opener	Technical Evaluator	Price Scrutiny	Price Evaluator	Bid Floor Admin.
10100020							۲
10100011		v					0
10100012		v					0
10100013				v			0
10100024			v	v		\checkmark	0
10100016			v				0
10100019					v		0
10100017						v	0

Item Tab

Click on he "Items" tab of the RFx document. This tab contains all the BOQ items mentioned in the purchase requisition. All the items will be replicated from the purchase requisition automatically

To see the details of the item's click on the "Details" button. System will display all the details pertaining to the material / services as shown in the screenshot below.

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Display RFx:													(
Edit Close 1	Fechnical RFx Copy Che	ck Export Print Preview M	aintain Rfx Para	meter System Information	Create	e Memory Snapshot	Related Li	inks 🖌					
RFx Number 5100000185 Number of Suppliers	RFx Name 10100020 0 Number of Items		Adv/Opn Tende /ersion Type			reated On 22.07.20 n Number	20 15:38:46	i Ci	reated By	ADITI SHENDYE	Tir	ne Zone INDI.	Ą
RFX Information	Bidders Items	Notes and Attachments We	ights and Score	es Approval Track	ing								
▼ Item Overview													
RFx Response Required	for All Items 📃 Bidder C	an Add New Items 🛛 🗌 Allow	RFx Response	Modification 🗌 Bidder (Can Chan	ge Quantities							
Details Add Line Add	dd Subline 🖌 🔐 🤇 Cut 🛛	Copy Paste 🖌 Delete								E	Expand A	II Collapse All F	Filter Settings I
₿ Line Number Item Ty	pe Product ID Descript	ion	Lot Allow I	RFx Response Modification	Variant	Product Category	Quantity	Unit	Currency	Delivery Date	Notes	Attachments	Internal Item
▼ Cilline Outline	Cal/Stat	Survey Maint by External Vendo	N			72000000		1 AU	INR	31.12.2021	<u>0</u>	<u>0</u>	1
• 🏟 🗊 Service	830000085 Two Co	ats - Oil Bound Distemper			\$	72000000	. :	3 M2	INR	31.12.2021	<u>0</u>	<u>0</u>	2
	Item : Two Coats - Oil Bo	und Distemper											
	Item Data Questions	Notes and Attachments											
Ider	tification			Curroney	Valuae	and Pricing							
1001		: Service functional		currency	valuesa	Currency: INR							
		: Service			Qu	iantity/Unit:		3 M2	2				
	Product II												
	Description	: Two Coats - Oil Bound Dister	nper	Service a	nd Delive	ery							
	Product Categor	r 7200000 Co	nstruction Servi	ce	Del	livery Date: From	31.1	12.2021					
		t 🗌											
Allor	u DEv Deenonen Madification												

Approval Tab

Under this tab, Buyer will be able to see the Approver's determined by the system. Dependingon the value and type of the Tender the levels of approvals may vary.

Please see screenshot below.

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Disp	lay RFx:								
E	dit 🖍 Close	Technical RFx Copy Check Ex	port Print Preview	w Maintain Rfx Parameter Sys	tem Information Create Memory	Snapshot Relate	ed Links 🖌		
RFx I	Number 510000018 Number of Supplier		020 15:31:01 /ersion Number	Type Adv/Opn Tender 1 Env Version Type Active Versio		22.07.2020 15:3	8:46 Created B	y ADITI SHENDYE	Time Zone INDIA
	RFX Information	Bidders Items Notes and	Attachments	Weights and Scores	Tracking				
	Current Status:	Initial		Header Approval Not	9				
Cu	rrent Process Step:								
Curre	ently Processed By:								
App	oval Process Data:	Download as XML							
		Work Item to Requester at Process I	End						
_	Header Item								
	leader Approval Sta	tue							
	Add Approver A	emove Approver							
	Sequence	Process Step	Status		Processor		Received On	Processed On	Forwarded By
	• 001	SRM RFx Completion	Open (No E	Decision Made)	MANDAR PARKAR				
	• 002	SRM RFx Completion	Open (No E	Decision Made)	RAMESH SUBRAMANIAN				
	• 003	SRM RFx Completion	Open (No E	Decision Made)	MUKESH NAWANI				
						1			

C-Folder Attachment

Before publishing the tender's there are many supporting documents to be uploaded. Such as NIT document, Technical Specifications, Drawings etc. These documents are useful for the Bidder to understand the requirements and submit the technical and commercial responses accordingly. Please refer below table detailing about the standard folder's available for uploading the documents and their purpose.

Folder	Folder Description	Used By
External Area	Contains documents that are to be shared with the RFx	Buyer/Tender
	respondents.	Creator
	NIT document has to be uploaded in the this area.	
Collaboration	Used by RFx respondents and evaluators to exchange	Buyer / Bidder
	information, for example, the RFx respondents can ask	
	questions that are answered by the evaluators.	
Internal Area	Contains documents that are only to be viewed by users	Port Users
	from the purchasing organization.	
Evaluation	Contains evaluator comments	Evaluators
Technical Bid	When the RFx respondent creates an RFx response, a folder	Bidder
	is created under Technical_Bids in which the RFx respondent	
	can store technical RFx response documents.	

To upload the documents in C-folder and digitally sign the uploaded documents, click on the "Notes and Attachment" tab located under "RFx Parameter" option. Scroll down and click on "Add Attachment" button

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Please see the screenshot below.

Edit RFx :	
	Export Print Preview Delete Maintain Rfx Parameter Import System Information Create Memory Snapshot Related Links /
	Type Adv/Opn Tender 1 Env Status Saved Created On 22.07.2020 15:38:46 Created By ADITI SHENDYE Time Zone INDIA
Number of Suppliers 0 Number of Items 1 Version Number	Version Type Active Version External Version Number
RFX Information Bidders Items Notes and Attachments	Weights and Scores Approval Tracking
RFx Parameters Questions Notes and Attachments	
Here you can add documents, edit internal and supplier notes, and create a collabo	ration room for the RFx
▼ Notes	
Clear	
Category	Description
	-Empty-
	-Empty-
Tendering text	-Empty-
	-Empty-
Attachments	
Collaboration	
Add Attachment Delete Verify Signature	Filter Settings

A new window will be displayed and system prompts to select the folder in which the document has to be uploaded. Select "External Area" and then click on "Browse" button as shown in the screenshot below.

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	-Empty-		
	-Empty-	Add Attachment	
	-Empty-		
	-Empty-	Here, you can upload a file a	nd attach it to the header
		File:	Browse
_		Description:	
		Folder Name EXTERNAL	AREA 👻
ate Profile			
isible Interna	ally only Checked C		
			OK Cancel

Select the document from the respective folder on your PC/Laptop and then click on the "Open" button.

RFx Number 5100000185 RFx Name 101000 Number of Suppliers 0 Number of Item	22 22.07.2020 15:31:01 Type Adv/Opn Tender 1 Env is 1 Version Number Version Type Active Ver			By ADITI SHENDYE Time 2	Zone INDIA
RFX Information Bidders Items	Notes and Attachments Weights and Scores App	oroval Tracking			
RFx Parameters Questions Notes and Att	achments	🥖 Choose File to Uploa	ad		х
Here you can add documents, edit internal and suppli	ier notes, and create a collaboration room for the RFx	$\leftrightarrow \rightarrow \times \uparrow$	< IPA Proj > Documents to Upload	✓ ^ひ	ents to Upload
▼ Notes	Add Attachment				
Clear	Here, you can upload a file and attach it to the header	Organize 🔻 New	folder	8==	• 🔳 🔞
Category	File: D:VPA Project/VPA Project Browse	💻 This PC	^ Name	Date modified	Туре
	Description:	3D Objects	NIT Document.docx	7/23/2020 8:04 AM	Microsoft Word
	Folder Name: EXTERNAL AR 💌	Desktop	Document for Internal Area.docx	7/23/2020 8:04 AM	Microsoft Word
Tendering text		Documents	Document for External Area.docx	7/23/2020 8:04 AM	Microsoft Word
		Downloads			
		👌 Music			
Attachments	OK Cancel	Pictures			- 1
		🛛 Videos			
Collaboration		🏪 Windows (C:)			
• Conaboration		👝 Data Disk (D:)			
✓ cFolder Attachments		🔒 CD Drive (E:) WI	C		
Add Attachment Delete Verify Signature		CD Drive (Ei) M/D	v <		>
cFolder Name Category Description File N	Name Version Processor Checked Out Type Size (KE	3 F	ile name: NIT Document.docx	✓ All Files (*.*)	~
i The table does not contain any data			L	Open	Cancel

Once the file is uploaded the screen will be displayed as below. Click on "Ok" button to proceed further.

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	Add Attachment	
	Here, you can up	load a file and attach it to the header
	File: D	:\IPA Project\IPA Projec Browse
	Description:	
	Folder Name: E	XTERNAL AR 👻
JL		
Р		а
		OK Cancel

System prompts for digitally signing the uploaded document. A window will be prompted and then click on "Ok" button as shown in screenshot below.

Launchpad Start URL - IPA SRM Portal - Internet Explorer Thttps://ipasdbqiee. portebs.com :50001/iij/portal?NavigationTarget=ROLE5%3A%2P%2Pport	al_content%2Fcom.ipa.IPA_Content%2Fcom.ipa.Portal_Roles%2Fcom.ipa.ro_strategicpurchaser%2Ffl_navi%2F	com.sa
		_
(Message from webpage	
	Session Management will not work! Please check the DSM log file for details.	
	You can turn off this alert inside 'Support Desk' -> 'SAP Application'	
	OK	
L		

Another window will be prompted, where the buyer needs to select the correct digital signature and then click on "Sign" button.

 The signed document cannot Unable to determine the auth The document's signature can 		
	C=US, S=CA, O=SAP Labs, L=Palo Alto, OU=Cloud Integration	s Sign.
	< Digital Signature	Sign Cancel
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Enter the password in the window prompted and then click on "Ok" button.

Digital Signature

Use the document's digital signature with your personal key to ensure the following properties.

- The signed document cannot be changed later (integrity).
- Unable to determine the author of the signature (authenticity).
 The document's signature cannot be disputed later (binding).

Enter User PIN	:	×
User PIN:	*****	
Note: Length sh	ould be between 6–32 characters	
ОК	Cancel SoftKeyboard	

Once the password is successfully verified, system will display a confirmation window. Click on "Ok" button as shown below.

Message	e from webpage	×
	Document signed: signer details (CN= SN=204958cfac7f8ade81ec2bf3cfa371247d5e0at 647b0156734f7, telephoneNumber=f19db29af81bdf79920dcd04 e7ce0803c7048f9ff211db60f1ae, SP=Maharashtr postalCode=400607, O=Personal, C=IN)	d20c898dadba
		ОК

Similarly, Buyer can add multiple documents following the same steps. The size of the individual file should not exceed 5 mb. Buyer can upload multiple documents in the External Area folder and Collaboration folder as shown below.

All the uploaded documents need to be digitally signed by the Buyer.

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RFX Information	Bidders Item	s Notes and Attachments	Weights and Scores Approv	al	acking						
		Attachments	weights and Scores Approv	ai ii	acking						
	ents, edit internal and su	upplier notes, and create a colla	boration room for the RFx								
Votes											
lear											
Category			Description								
			-Empty-								
			-Empty-								
Tendering text			-Empty-								
			-Empty-								
#											
ttachments											
ttachments											
ollaboration											
ollaboration											
ollaboration Folder Attachments	ete Verify Signature								Filter Settings		
ollaboration Folder Attachments Id Attachment Del	ete <mark>Verify Signature)</mark> Category	Description	File Name	Version	Processor Checker	Out Type	Size (KB)			1	
ollaboration Folder Attachments Id Attachment Del cFolder Name			File Name NIT Document docx sig	Version 1	Processor Checkec	Out Type	Size (KB) 14]	
cFolder Name EXTERNAL AREA	Category Standard Attachment			1				Changed by	Changed on]	

Tracking Tab

Under this tab, Buyer can check all the history related to this RFx i.e. the Backend purchase requisition, Shopping Cart that got created against this backend document and the RFx that has been created.

Any changes to the RFx can be seen here in this tab under the "Version Overview" option.

All the updates can be checked under this tab. Please see screenshot below.

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						Options
Display RFx:						Open side pan
Edit 🖉 Close Technical RFx	Copy Check Export Print Preview	Maintain Rfx Parameter System	Information Create Memory Snapshot Related Lin	ks "		C
	e 10100020 22.07.2020 15:31:01 Typ er of Items 1 Version Number	be Adv/Opn Tender 1 Env Sta Version Type Active Version	atus Saved Created On 22.07.2020 15:38:46 External Version Number	Created By ADITI SHENDYE	Time Zone INDIA	
RFX Information Bidders I	tems Notes and Attachments We	ights and Scores Approval	Tracking			
▼ History						6
View: Indian Rupee						Filter Settings
Document	Name	Document Number	Back-End Document Number	Status	Date	
External Requirement	PI_USER 19.07.2020 15:13	200000163	2001000962	Approved	19.07.2020	
RFx	10100020 22.07.2020 15:31:01	<u>5100000185</u>		Saved	22.07.2020	
▼ Status						-
System Status Held > Created > Complete						
▼ Version Overview						=
Detail Compare						
Version	Document/Version Type	Created On	Changed On	Document Name	External Version Number	
	Active Document	22.07.2020 15:38:46	23.07.2020 08:13:32	10100020 22:07:2020 15:31:01		
▼ Change Documents						-
Changed Since	C Changed From/To		Search	Expand All Collapse /	All <u>Hide Query</u> <u>Filter</u>	<u>Settings</u>

Publish RFx with Digital Signature

Once all the details are entered in the RFx click on the "Check" button. If there is any mandatory information left out to be filled, system will display an error message in red color. Else system will display message as below in green color.

"RFx is complete and contains no errors"

Please ensure that you have inserted the digital signature token in your PC/Laptop USB.

Click on "Publish" button as shown in screenshot below.

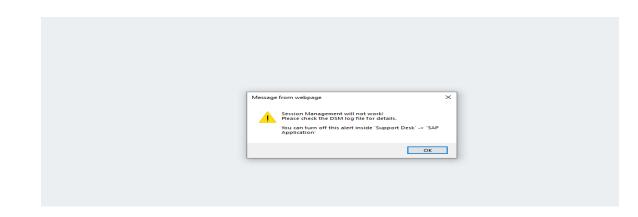
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Edit RFx :			Open side panel
Read Only Close Technical RFx	Permissions Publish Save Check E	xport Print Preview Delete Maintain Rfx Parameter Import System Information Create Memory Snapshot Related Li	inks 🖌 👔
M Enter at least one partner of type Bidder	Or Portal Provider		
	me 10100020 22.07.2020 15:31:01 Ty nber of Items 1 Version Number	rpe Adv/Opn Tender 1 Env Status Saved Created On 22.07.2020 15:38:46 Created By ADITI SHENDYE Version Type Active Version External Version Number	Time Zone INDIA
RFX Information Bidders	Items Notes and Attachments	Weights and Scores Approval Tracking	
RFx Parameters Questions N	otes and Attachments		
Tender Description:	TO CAPTURE THE LONG	Detailed Price Information: Simple Price	
Tender Description.	DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.	Follow-On Document: Purchase Order or Contract	_ '
RFx Type:	Adv/Opn Tender 1 Env	Bidder Can Change RFx Responses: 🗸	AMC Indicator: 🔽
Publication Type:	Public RFx 💌	Allow Multiple RFx Responses for Each Company:	QSBC:
		Display Weighting to Bidders:	Percentage Bidding:
Organization	Mumbai Port Trust Purchase Organisation	Tender Fee	Security Deposit
Purchasing Organization.		Show Members	* Security Deposit Required:
Purchasing Group.	material wynit Purchase Group	Show members	* Security Deposit Percentage: 8
Dates		Required: 🔽	
RFx Start Date:	23.07.2020 🛐 09:30:00	Tender Fee Percentage: 2	
* RFx Submission Date:	23.07.2020 🛐 11:00:00	* Tender Fee: 1,200.00 INR	
Price Rfx Opening Date:	23.07.2020 🛐 11:00:00	Submission Deadline: 23.07.2020 🕅 10.20:00	
Technical RFx Response Opening Date:	23.07.2020 🔯 11:00:00		
End of Binding Period:	6	Earnest Money Deposit	
Valid From / To:	23.07.2020 🛐 - 19.01.2021 🛐	Required: 🔽	
		EMD Dercentaria: 5	

Once you click on this button as pop-up window will be displayed as below. Click on "Ok" button.



A new window will be displayed prompting the select the digital signature. Select the signature and click on "Sign" button as shown in screenshot below.

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Digital Signature					×	
Check the document displayed	i below.		Print	Save		
	MUM	BAI PORT TRUST RFX			Î	
		RFx Number : 51000001 Version : Port Tender Number : MBPT/20				
RFx currency Time zone Bidding procedure Submission period Technical Opening date Price Opening date Valid From	: INR : INDIA : Public Tender : 23.07.2020 11:00:00 : 23.07.2020 05:30:00 : 23.07.2020 - 19.01.2021				~	
I I I Fo sign the document, select one of the certificates and choose Sign. C=IN, O=Personal, PostalCode=400607, S=Maharashtra, Phone=f19db29at81bdf79920dcd04d20c898dadbae7ce0803c7048f9ff211db60f1ae, S C=US, S=CA, O=SAP Labs, L=Palo Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo, Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo, Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo, Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo, Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo, Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo, Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo, Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo, Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo, Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo, Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo, Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo, Alto, OU=Cloud Integration, CN=*,wdf.sap.corp (C=US, S=CA, O=SAP Labs, L=Palo, Alto, OU=Cloud (D=US, S=CA, O=SAP Labs, L=Palo, Alto, O=Cloud (D=US, S=CA, O=SAP La						
SAP Digital S	Signature		Sign	Cancel		

System further prompts to enter the password. Input the password and click on "Ok" button as highlighted in below screenshot.

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Enter User PIN		>
User PIN:	*****	
Note: Length	should be between 6-32 character	5
OK	Cancel SoftKeyboard	

Again system will prompt a new pop-up window with the message that the RFx has been digitally signed by the user. See the screenshot below.

https://ipasapqimq.portebs.com:4302/sap(bD1lbiZjPTUwMCZwPTM0MjE0JnY9Ny	41MCZpPTE=)/bc/bsp/sapsrm/call_sig_ctrl/signature.htm?onInpu	tProcessing=SIGNATURE&sap-params=c3NmX3NIc3Nf
	Message from webpage	×
	Document signed: signer details (CN=Abhay Subh SN=204958cfac7f8ade81ec2bf3cfa371247d5e0abe	ash Gade,
	647b0156734f7,	
	telephoneNumber=f19db29af81bdf79920dcd04d2 e7ce0803c7048f9ff211db60f1ae, SP=Maharashtra,	UCOSODADDA
	postalCode=400607, O=Personal, C=IN)	
		ОК

System displays message as "RFx xxxxx xxxx has been published".

Please note that by clicking on Publish button, this RFx will not be available for the Bidder to create response.

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Based on the approvers maintained, system will follow the approval process. Once the RFx is approved at all the levels then only it will be available to Bidder to submit his responses.

As seen in the screenshot below the status of RFx is "Awaiting Approval"

				Uptions 🔻
Display RFx :				Open side panel
	x Show my Tasks Copy Check 🕞 Dis	scharge RFx Export Print Preview Maintain Rfx Parameter System Information	on Create Memory Snapshot Rel	lated Links 🖌
RFx 10100020 22.07 2020 15:31:01- 51	00000185 has been published			
	me 10100020 22.07.2020 15:31:01 Typ nber of Items 1 Version Number	e AdvlOpn Tender 1 Env Status Awailing Approval Created On 22.07 Version Type Active Version External Version Number	7.2020 15:38:46 Created By A	NDITI SHENDYE Time Zone INDIA
RFX Information Bidders	Items Notes and Attachments W	/eights and Scores Approval Tracking		
RFx Parameters Questions No	otes and Attachments			
	TO CAPTURE THE LONG	Detailed Price Information:	Simple Price	
Tender Description:	DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.	Follow-On Document:	Purchase Order or Contract	· ·
RFx Type:	Adv/Opn Tender 1 Env	Bidder Can Change RFx Responses:	V	AMC Indicator: 🗹
Publication Type:		Allow Multiple RFx Responses for Each Company:	V	QSBC:
,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		Display Weighting to Bidders:		Percentage Bidding:
Organization		1		
	Mumbai Port Trust Purchase Organisation	Tender Fee		Security Deposit * Security Deposit Required:
Purchasing Group:	Material Mgmt Purchase Group	Show Members		* Security Deposit Percentage: 8
Dates		Required:	V	
RFx Start Date:	23.07.2020 09:30:00	Tender Fee Percentage:	2	
* RFx Submission Date:	23.07.2020 11:00:00	* Tender Fee:	1,200.00 INR	
Price Rfx Opening Date:	23.07.2020 11:00:00	Submission Deadline:	23.07.2020 10:20:00	
Technical RFx Response Opening Date:	23.07.2020 11:00:00	Earnest Money Deposit		
End of Binding Period:		Lannest money Deposit		
Valid From / To:	23.07.2020 - 19.01.2021	Required:	V	

System will trigger email to the approvers as shown in screenshot below.

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Kindly Approve RFx 5100000
Created E ATRENUTIONSAD
Hi RamanaMoorthy
Kindly Approve RFx 5100000
RFx details are mentioned below:
RFx Number : 5100000 🕽
RFx Date/Time : 20200708 193000
RFx Description : 🔤
Regards, Workflow System
*** This is a system triggered e-mail from Indian Port Authority ***

Approving the RFx

Please follow the step mentioned under Section 1.1 EBS Portal for logging to EBS portal. Once the approver is redirected to the SRM portal through SSO, below SR screen will be displayed.

Select "Home" tab and the click on "Work Overview" link. Go to the "Tasks" tab. Here all the documents which are pending for approval will be visible.

Select the appropriate document and click on the link as shown in screenshot below.

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	E - PROCUREMEN	NT PORTAL	 Welcome MANDAR PARKAR (10 Login Time:23/07/2020 09:2
Home Strategic Purchasin Dverview			
Vork Overview leports Services	Alerts Tasks (10 / 10) Notifications Show: New and In Progress Tasks (10 / 10) All		\$ F (C)
dvanced Search	Approve RFx Number 5100000185	Sont Date - Due Date Today	≟ Status New
	Approve RFx Number 5100000131 Approve RFx Number 5100000123	Jul 2, 2020 Jun 26, 2020	New
	Approve RFx Number 510000098	Jun 21, 2020	New
	Approve RFx Number 5100000097	Jun 21, 2020	New
	Approve RFx Number 5100000108	Jun 21, 2020	New
	Approve RFx Number 5100000107	Jun 21, 2020	New
	Approve RFx Number 5100000104	Jun 21, 2020	New
	Approve RFx Number 5100000100	Jun 21, 2020	New

A new window will be opened. The RFx details will be visible in display mode. Approver will not be able to modify or change the tender created by the Buyer.

Click on "**Approve**" button to approve the RFx. In this case the RFx will be approved and will move to the next stage of approver.

Click on "**Reject**" button to reject the RFx. If the RFx is rejected, approver needs to input the reason for rejection. This document will go back to the tender creator i.e the Buyer.

Buyer needs to take appropriate action and re-trigger the workflow again.

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			Option
Approve RFx :			Open side pan
Approve Reject Close Inquire	Save Export Print Preview Delete Sy	stem Information Create Memory Snapshot Related Links 🖌	
	me 10100020 22.07.2020 15:31:01 Ty nber of Items 1 Version Number	pe Adv/Opn Tender 1 Env Status Awailing Approval Created On 22.0 Version Type Active Version External Version Number	7 2020 15:38:46 Created By ADITI SHENDYE Time Zone INDIA
RFX Information Bidders	Items Notes and Attachments V	Veights and Scores Approval Tracking	
RFx Parameters Questions N	otes and Attachments		
Identification		Event Parameters	
RFx Name:	10100020 22.07.2020 15:31:01	Currency:	INR
Port Tender No:	MBPT/2020/07/2201	Target Value:	60,000.00 INR
Tender Description:	THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.		Purchase Order or Contract
RFx Type:	Adv/Opn Tender 1 Env	Bidder Can Change RFx Responses:	
Publication Type:	Public RFx	Allow Multiple RFx Responses for Each Company:	
		Display Weighting to Bidders:	Percentage Bidding:
	Mumbai Port Trust Purchase Organisation	Tender Fee	Security Deposit
Purchasing Group:	Material Mgmt Purchase Group	Show Members	* Security Deposit Required:
Dates			
RFx Start Date:	23.07.2020 09:30:00	Required:	
* RFx Submission Date:		Tender Fee Percentage:	
		* Tender Fee:	1,200.00 INR
Price Rfx Opening Date:	23.07.2020 11:00:00	Submission Deadline:	23.07.2020 10:20:00

Once the RFx is approved message "Publication of RFx (Number 51xxxxxxx) was approved, as shown in the screenshot below.

Display RFx:	Taska Cany Chask D. Disabarra DEv	Export Print Preview Maintain Rfx Parameter System Information Create	Open side pa
Publication of RFx (Number 510000018	5) was approved		
	me 10100020 22.07.2020 15:31:01 Ty nber of Items 1 Version Number	pe Adv/Opn Tender 1 Env Status Awaiting Approval Created On 22.0 Version Type Active Version External Version Number	7.2020 15:38:46 Created By ADITI SHENDYE Time Zone INDIA
RFX Information Bidders	Items Notes and Attachments V	Veights and Scores Approval Tracking	
RFx Parameters Questions N	otes and Attachments		
Identification		Event Parameters	
RFx Name:	10100020 22.07.2020 15:31:01	Currency:	INR
Port Tender No:	MBPT/2020/07/2201	Target Value:	60,000.00 INR
	THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG	Detailed Price Information:	Simple Price
Tender Description:	DESCRIPTION OF THE TENDER. THE	Follow-On Document:	Purchase Order or Contract
DE: Toras	FIELD LENGTH IS 256 CHARACTERS. Adv/Opn Tender 1 Env	Bidder Can Change RFx Responses:	AMC Indicator: [
Publication Type:		Allow Multiple RFx Responses for Each Company:	QSBC: [
Tublication Type.		Display Weighting to Bidders:	Percentage Bidding:
Organization		_	
Purchasing Organization:	Mumbai Port Trust Purchase Organisation	Tender Fee	Security Deposit * Security Deposit Required:
Purchasing Group:	Material Mgmt Purchase Group	Show Members	* Security Deposit Percentage: 8
Dates		Required:	
RFx Start Date:	23.07.2020 09:30:00	Tender Fee Percentage:	
* RFx Submission Date:	23.07.2020 11:00:00	* Tender Fee:	1.200.00 INR
Price Rfx Opening Date:	23.07.2020 11:00:00	Submission Deadline:	23.07.2020 10:20:00
Technical RFx Response Opening Date:	23.07.2020 11:00:00		
End of Binding Period:		Earnest Money Deposit	
Valid From / To:	23.07.2020 - 19.01.2021	Required:	

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Documents approved will disappear from the "Tasks" tab.

Similarly, the remaining approvers can follow the above mentioned steps and approve the RFx. RFx once approved at all the stages, the status will change to "Published" from "Awaiting Approval" A mail will be triggered to the Supplier about the publication of the RFx. See the screenshot below.

RFx is available for RFx Response submission
Created E R.SUGANTHESWARI PRIYATHARISINI
Hi FELIX ENGG. CO. ,
RFx has been published and available for RFx Response submission.
RFx details are mentioned below:
RFx Number :
RFx Date/Time : 0000000 000000
RFx Description :
Regards, Workflow System
*** This is a system triggered e-mail from Indian Port Authority ***

Data Masking Bidder Data Masking

Until the RFx submission deadline date and time is arrived, the Bidder data will be masked. Buyer will not be able to know who the Bidders have participated in the advertisement / open tenders.

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	RFx Number 5100000185 RFx Name 10100020 22 07 2020 15:31:01 Type Adv/Opn Tender 1 Env Status Published Created On 22 07.2020 15:38:46 Created By ADITI SHENDYE Time Zone INDIA Number of Suppliers 3 Number of Items 1 Version Number 1 Version Type Active Version External Version Number 1								
RFX Inf	ormation Bidders	Items Notes and Attachments	Weights and Scores Approval	Tracking					
RFx Paramete	ers Questions N	otes and Attachments							
Identification			E	vent Parameters					
	RFx Name:	10100020 22.07.2020 15:31:01			Currency: INR				
	Port Tender No:	MBPT/2020/07/2201		Та	arget Value:	60,000.00 INR			
	Tender Description:	THIS PLACE HOLDER CAN BE USE TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. TI FIELD LENGTH IS 256 CHARACTER	HE	Follow-On	Information: Simple F Document: Purchas				
	RFx Type:	Adv/Opn Tender 1 Env		Bidder Can Change RFx	Responses: 🗸			AMC Indicator:	
	Publication Type:		A	llow Multiple RFx Responses for Eacl				QSBC:	
				Display Weighting	to Bidders:			Percentage Bidding:	
Organization									
	Purchasing Organization:	Mumbai Port Trust Purchase Orga							
	Purchasing Group:	Material Mgmt Purchase Group	RFX Information Bidders	Items Notes and Attachment	ts Weights and S	cores Approval Trac	king		
Dates	RFx Start Date:	23.07.2020 09:30:00	Bidder Overview Add Bidder by Company ID:	Add Search for E	Bidders 🖌 Send No	otifications Output Medium	Delete		
	* RFx Submission Date:	23.07.2020 11:00:00	E Company Name	Contact	Country	Company ID	Bidder Contact P	Person	
	Price Rfx Opening Date:	23.07.2020 11:00:00	XXXXXXXXXX	XXXXXXXXXX	XX	XXXX	XXXX		
Technical RFx	Response Opening Date:	23.07.2020 11:00:00	XXXXXXXXXXX	XXXXXXXXXXX	XX	XXXX	XXXX		
	End of Binding Period:		XXXXXXXXXXX	XXXXXXXXXXX	XX	XXXX	XXXX		
	Valid From / To:	23.07.2020 - 19.01.2021			Required: 🗹				

Tender Fee / EMD Fee Data Masking

Similarly, then Tender and EMD fee payment data will also be in masked status until the RFx submission deadline date and time is arrived.

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<i> </i> RFx - IPA SRM Portal - Internet Explore	r		– D
https://ipasdbqieq.portebs.com:50001	/irj/portal?NavigationTarget=ROLES%3A%2	F%2Fportal_content%2Fcom.ipa.IPA_Content%2Fcom.ipa.Portal_Roles%2Fcom	.ipa.ro_strategicpurchaser%2Ffl_navi%2Fcom.sap.pct.srm.core.iv_display_rfq&PrevNa
			Opti
Display RFx :			Open side (
Edit Close Technical RF	apshot Related Links	arge RFx Responses and Awards Create Follow-on RFx Export Print Previ	w Verify Signature Questions and Answers (0) Maintain Rfx Parameter
RFx Number 5100000185 RFx Na Number of Suppliers 3 Num	Supplier Evaluation me 10 Tender Fee Payment Details Tender of EMD Payment Details Create Bidder	pe Adv/Opn Tender 1 Env Status Published Created On 22.07.2020 1 Version Type Active Version External Version Number 1	15:38:46 Created By ADITI SHENDYE Time Zone INDIA
RFX Information Bidders		Veights and Scores Approval Tracking	
RFx Parameters Questions N	otes and Attachments		
Identification		Event Parameters	
	10100020 22.07.2020 15:31:01	Currency	INR
Port Tender No:	MBPT/2020/07/2201 THIS PLACE HOLDER CAN BE USED	Target Value	60,000.00 INR
Tender Description:	TO CAPTURE THE LONG	Detailed Price Information	
Tonicol Docompilation.	DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.	Follow-On Document	
RFx Type:	Adv/Opn Tender 1 Env	Bidder Can Change RFx Responses	_
Publication Type:	Public RFx	Allow Multiple RFx Responses for Each Company	
		Display Weighting to Bidders	Percentage Bidding:
Organization		~	
	Mumbai Port Trust Purchase Organisation	Tender Fee	Security Deposit * Security Deposit Required: 🔽
Purchasing Group:	Material Mgmt Purchase Group	Show Members	* Security Deposit Required. V
			* Security Deposit Percentage. 8

Tender Fee Payment Details in masked status

ender Fee	Paymen	nt Details								
RFx Name 10	20 15:31:01	Rf	x No. 5100000	185 Submi	sion Deadline 23.07.2020	10:20:00	Time Zone INDIA			
ave Close Window										
der Fee Payment De	tails									
lit Details										
Company Name	Contact	Payment Method	Amount	Currency	Instrument Number	Payment / Waived Dat	e	Payment / Waived Time	Payment Status	
XXXXX	XXXXX	XXXXX	1,200.00	XXX	XXXXX	XX.XX.XXXX		XX:XX:XX	Waived	
XXXXX	XXXXX	XXXXX	1,200.00	XXX	XXXXX	XX.XX.XXX		XX:XX:XX	Paid	
XXXXX	XXXXX	XXXXX	1,200.00	XXX	XXXXX	XX.XX.XXXX		XX:XX:XX	Paid	

EMD Payment Details in masked status







EMD Payment Details										
RFx Name 10100020 22.07.2020 15:31:01 RFx No. 5100000185						Submission Deadline 23.07	.2020 10:20:00 Time	Zone INDIA		
ave Close Windo	w									
ID Payment Details										
ID Payment Details dit Details										
	Contact	Payment Method	Amount	Currency	Instrument Number	Payment / Waived Date	EMD Reversal	Reversal Date	Status	
dit Details		Payment Method	Amount 3,000.00		Instrument Number	Payment / Waived Date	EMD Reversal	Reversal Date	Status Waived	
tit Details Company Name	Contact			XXX						

Technical RFx Response Activity Initiate Technical RFx Response Opening

Buyer needs to login first to the EBS portal. Please refer to section number 1.1 for login to EBS portal & SSO to SRM portal & follow the steps.

Click on "Strategic Purchasing" tab and then click on "Strategic Sourcing" link. At the right side panel in the Search criteria screen provide the RFx number and then click on "Apply" button.

This particular RFx will be displayed, select the RFx and click on "Display" button. Simultaneously you can also click on the RFx number to open the RFx.

Please see the screenshot below.

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Home Strategic Purchasing										
Overview Reports										
Strategic Sourcing										
Contract Management	Strategic Sourcing	F								
Business Partner										
Workload Redistribution	* POWL	5								
Active Queries										
Advanced Search	RFas Material Saved. 251 Anvilles. Approx. 1240 Published. 1541 Consoleted. (3) Release. Reinsted. (3) Deteted. (3)									
Create Documents	Auctions ALCO Saved (0) Exhibited (1) Active (0) Example (0) Ended (0) Exhibited (0) E									
* Auction	Sources implants all parts of the last devices for last all restored to the sources of the sourc									
* Auction Template	Bocument Output Lant 7 days (17)									
* RFx	Milestore Plans ALIS									
* RFx Template	RFm-All	ı l								
Central Functions	Hole Quick Criteria Maintenance Query has been changed Change Query Define New Query Define New Query Personalize									
* Carry Out Sourcing										
Upload / Migrate Certificate	Namber of 510000176 To									
	Name of Rfz									
	Status *									
Contract Management	Submission Deadline:	ÍŤ								
Business Partner	My RFx.									
Workload Redistribution	Purchase Group:									
	Number of RF's responses: Ta									
Services	Suppler: D	11								
Advanced Search		11								
Create Documents	Aggly Chear									
* Auction	Veer, Standard Vervi 💌 Create RFx Copy Daplay Edit Delete Publish Responses and Awards Print Preview Refresh Export _ 2									
* Auction Template	E RFx Number RFx Name Type Status RFx Category Purchasing Organization Submission Deadline Responses									
* RPx	5100002125 10100020 18 67 2020 18 54 38 ZSTI Published Mumbai Port Trust Purchase Organisation 26 67 2020 1									
* RFx Template										

RFx will be visible in another window and it will be in display mode. Click on the "Initiate Technical RFx Response Opening" button. This button will be active once the Technical RFx Response Opening Date & time is reached.

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			opuon
Display RFx :			Open side par
		oonse Opening Open Technical RFx Response Copy Check L ¹ iij Discharge f ormation Create Memory Snapshot Related Links _	IFX Responses and Awards Create Follow-on RFX Export Print Preview
	me 10100020 22.07.2020 15:31:01 Typ nber of Items 1 Version Number	e Adv/Opn Tender 1 Env Status Published Created On 22.07.2020 1 1 Version Type Active Version External Version Number 1	5:38:46 Created By ADITI SHENDYE Time Zone INDIA
RFX Information Bidders	Items Notes and Attachments W	/eights and Scores Approval Tracking	
RFx Parameters Questions N	otes and Attachments		
Identification RFx Name:	10100020 22:07:2020 15:31:01	Event Parameters	
	MBPT/2020/07/2201	Currency:	
Poir Tender No.	THIS PLACE HOLDER CAN BE USED	Target Value:	60,000.00 INR
Tender Description:	TO CAPTURE THE LONG	Detailed Price Information:	
	DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.		Purchase Order or Contract
RFx Type:	Adv/Opn Tender 1 Env	Bidder Can Change RFx Responses:	
Publication Type:	Public RFx	Allow Multiple RFx Responses for Each Company:	
		Display Weighting to Bidders:	Percentage Bidding:
Organization			
	Mumbai Port Trust Purchase Organisation	Tender Fee	Security Deposit Security Deposit Required:
Purchasing Group:	Material Mgmt Purchase Group	Show Members	* Security Deposit Percentage: 8
Dates		Required:	
RFx Start Date:	23.07.2020 09:30:00	Tender Fee Percentage:	
* RFx Submission Date:	23.07.2020 11:00:00	* Tender Fee:	1.200.00 INR
Price Rfx Opening Date:			
		Submission Deadline:	23.07.2020 10:20:00
Technical RFx Response Opening Date:	23.07.2020 11:00:00	Earnest Money Deposit	
End of Binding Period:			
Valid From / To:	23.07.2020 - 19.01.2021	Required:	

A new window will get opened. Here the Buyer needs to provide the password to proceed further. Click on "Acknowledge" button. System will start the technical opening process.

a	Simultaneous Logon	×
	User ID: 10100020 * Password: •••••• Acknowledge Cancel	: []
	Process Details	: S : P
	Process Start-End Time: 00:00:00 - 00:00:00	
	🔓 Help	
	Enter your system password for secondary verification. The password is checked against the system.	
<u>v N</u>	Close	
		: 🗹
	* Tender	

Below screen will be displayed. Click on "Close" button to close this window.

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Simultaneous Logon												
1000												
User approval succe	ssful											
Process Details												
Process Start-End Time: 15:45:06 - 15:50:06												
Process Time Remaining												
00:05:00												
Extend Process Time:	00:00:00	Extend]									
Active Approvals												
User Status												
User	Approved	Approval Time										
10100020		00:00:00										
🚮 Help												
Enter your system pass password is checked ag		ry verification. The										
Close												

Since this is an Open tender single envelope tender, system will automatically perform the opening of the technical rfx response. Buyer needs to proceed to perform the TCR report related activities as explained in next section.

Technical Comparative Statement

Now we need to perform the TCR activity as this is a common process to be performed for all tender types.

There is always as possibility that the tender committee members may be required to change due to nonavailability or transfer etc. In such scenarios, Buyer can always modify the user's in the Permission Tab. New users can be added or for the existing user's the roles can be modified.

To access the TCR report, click on "Response and Awards" button as mentioned in the below screenshot.

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Display RFx :		Open side panel
		rmissions Copy Check Lig Discharge RFx Responses and Awards Create Follow-on RFx Export Print Preview Verify Signature System Information Create Memory Snapshot Related Links _
	ame 10100020 22.07.2020 15:31:01 Typ mber of Items 1 Version Number	e Adv/Opn Tender 1 Env Status Published Created On 22.07.2020 15:38:46 Created By ADITI SHENDYE Time Zone INDIA 1 Version Type Active Version External Version Number 1
RFX Information Bidders	Items Notes and Attachments W	/eights and Scores Approval Tracking
RFx Parameters Questions N	otes and Attachments	
Identification		Event Parameters
RFx Name:	10100020 22.07.2020 15:31:01	Currency: INR
Port Tender No:	MBPT/2020/07/2201	Target Value: 60,000.00 INR
Tender Description:	THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG	Detailed Price Information: Simple Price
	DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.	Follow-On Document: Purchase Order or Contract
RFx Type:	Adv/Opn Tender 1 Env	Bidder Can Change RFx Responses: 🗹 AMC Indicator: 🗹
Publication Type:	Public RFx	Allow Multiple RFx Responses for Each Company: 🗹 QSBC:
		Display Weighting to Bidders:
Organization		
Purchasing Organization:	Mumbai Port Trust Purchase Organisation	Tender Fee Security Deposit
Purchasing Group:	Material Mgmt Purchase Group	Show Members * Security Deposit Required: 🔽
		* Security Deposit Percentage: 8
Dates		Required: 🗹
RFx Start Date:	23.07.2020 09:30:00	Tender Fee Percentage: 2
* RFx Submission Date:	23.07.2020 11:00:00	* Tender Fee: 1,200.00 INR
Price Rfx Opening Date:	23.07.2020 11:00:00	Submission Deadline: 23.07.2020 10:20:00

A new window will get opened. Select the "Technical Response Activity" tab and click on the "TCR Report" button.

ponses and Awai		System Information Create Memory Snapshot				Open sid
aining Time 0 Days 00:00):00 RFx Name 10100020 22.	.07.2020 15:31:01 Type Adv/Opn Tender 1	Env Status Published	Number of Suppliers 3 RFx N	umber <u>5100000185</u>	
Response Activity	Surrogate Bidding	sponse Activity				
						_
TCR Report Accept						
						Se
RFx Response	RFx Response Status	Company Name	Bidder Name	RFx Response Versio	n Last Changed	Se
		Company Name FELIX ENGG. CO.	Bidder Name FELIX ENGG. CO.	RFx Response Versio	n Last Changed 23.07.2020	Se
RFx Response	RFx Response Status			RFx Response Versio	-	Se
RFx Response 6100000185	RFx Response Status Bid submitted	FELIX ENGG. CO.	FELIX ENGG. CO.	RFx Response Versio	23.07.2020	Se
RFx Response 6100000185 6100000187	RFx Response Status Bid submitted Bid submitted	FELIX ENGG. CO. M/S. A. A. TRADERS,	FELIX ENGG. CO. A. A. TRADERS,	RFx Response Versio	23.07.2020 23.07.2020	Se

A new window will be displayed. Here in this screen, the details provided by the Bidder's against the question maintained by the Buyer will be displayed. Buyer needs to provide his findings under the "Buyer comments for 61xxxxxxx" for all the line items.

Supporting documents uploaded by the Bidders will be visible under the "List of Attachments" section. Confidential Document Copyright © 2018 Tech

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Fx No:	al Comparative S 5100000185 Mumbai Port Trust	Purchase	Organisation										
	ntain Comments ag Comparative												
S.No.	Group	Questio	Question		40000442 & / 6100000185	Buyer Comments for 61	00000185	40000444 & / 6100000187		Buyer Comments for 6100000187		40000899 & / 6100000188	Buyer Comments for 6100000188
1	Eligibility Criteria	DOU YOU HAVE PAN NO		YES	OKaccepted		YES	C	Ok.PAN verified		YES PAN NO IS AVAIABLE	ok	
2	Eligibility Criteria	igibility Criteria WHETHER DOCUMENTS FOR START UP		IS FOR START UP	YES	The document uploaded	l is ok	YES ATTAC	HED 1	The document uploaded is ok		YESS	The document uploaded is ok
t Of Att	tachments					mail Logs for Sho	ortfall Docs						
RFx No		inse No	Vendor Name	Attachment		RFx Response No		Comments	Sender	r Sent Date	Sent Time		
510000				STARTUP DOCUMEN									
510000	0185 610000018	57		STARTUP DOCUMEN	T.DOCX								
510000	0185 610000018	8		STARTUP DOCUMEN	T.DOCX								
	omments												

For any shortfall documents, Buyer needs to intimate the Bidder to submit the same. To perform this step, click on "Short Fall Docs" button as shown in screenshot below.

		_	
Save	Short Fall Docs	Maintain Workflow Sequence	Forward PDF Clos

A new window will get displayed as shown below.

In this step, Buyer need to select the relevant RFx response number, write appropriate content under the "Email Content" option. Once done Buyer will click on "Send Mail" button. Mail will get triggered to the respective Bidder.

Bidder will send the required documents offline. Buyer can later on verify the documents and upload the same in C-folder of that particular RFx.

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Technical Com	parative Stat.	× 📑	
SAP			
No: 510000	185		
ease Select	Vendor to	send Mail	
end Mail Bac	k		
Quotation No	Vendor Id	Vendor Name	Email Id
6100000185	40000442	FELIX ENGG. CO.	ag00615222@techmahindra.com
610000187	40000444	M/S. A. A. TRADERS,	ag00615222@techmahindra.com
6100000188	40000899	CONA INDUSTRIES	ag00615222@techmahindra.com
ease mainta	in email co	ontent here	
Email Conten	t		
PAN number	scan copy is n	ot properly visible. Please	mail it on abc@test.com

The email log details will also be available for all the short fall documents related communication as shown below.

	c No: 51	00000185													
		umbai Port Trust F													
**Plea	ase Mainta	ain Comments aga	ainst eacl	h RFx Response											
Fech	nnical C	omparative	Staten	nent											
	S.No. (Group	40000442 & Question / 6100000185		В	Buyer Comments for 6100000185		40000444 & / 5100000187	Buyer Comments for 6100000187		40000899	& / 6100000188	Buyer Comments for 6100000		
	1 6	Eligibility Criteria DOU YOU HAVE PAN NO YES		YES	0	OKaccepted		YES	OkPAN verified		YES PAN NO IS AVAIABLE		ok		
	2 E	Eligibility Criteria WHETHER DOCUMENTS FOR START UP		TS FOR START UP	YES	The document uploaded is ok		1 is ok	YES ATTACHED	The document uploaded is ok		YESS		The document uploaded is ok	
.ist (Of Atta	chments					Em	ail Logs for Sho	ortfall Docs						
	RFx No	RFx Respo	nse No	Vendor Name	Attachment		Ð	RFx Response No	Vendor Name	Comments		Sender	Sent Date	Sent Time	
	51000001	185 610000018	5		STARTUP DOCUMENT.DOCX			6100000185	FELIX ENGG. CO		scan copy is not properly	10100020	23.07.2020	11:17:04	
	51000001	185 610000018	7		STARTUP DOCUMEN	T.DOCX				visidié. Pléase	e mail it on abc@test.com				
		05 04000040			STARTUP DOCUMENT.DOCX										

Mail will get triggered and system will display the success message as shown in screenshot below.

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All 🗹 1	
✓ Mail send Successfully to Selected Vendors	
SAP	To Send mail to vendor for Short fall Docs

Once Buyer has performed his preliminary scrutiny and received all the shortfall documents, it is mandatory to maintain the overall comments & Save it by clicking on the "Save" button. Please see screenshot below.

er's Overall C utiny's Te	omments: Felix Engl	s also recei 1. Co.	and shortfall ved and verified v and review	from		
User ID	Full Name		Status	Comment's Date	Comment's Time	Comments
10100011	SIDDHASA	NJAY APH	ALE		00:00:00	
10100012	PERAMPA	TTANALIL (GOPI		00:00:00	
servation/	Recommendatio	on comn Status			ime Comments	
10100013	ARVIND APANDKA		Commone	00:00:00		
10100024	MRINALINI KELKAR	2		00:00:00		

Buyer needs to forward the tender to the scrutiny and review committee team further. To do so Buyer first needs to click on "Maintain Workflow Sequence" button as shown below.

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	Full Name		Status	Comment's Date	Comment's Time	Comments
100011	SIDDHASAI	IJAY APHA	LE		00:00:00	
100012	PERAMPAT	TANALIL G	iopi		00:00:00	
vation/	Recommendatio	n comm	ittee's Co	mments		
vation/ ser ID	Recommendatio	n comm Status	ittee's Co Comment's		Time Comments	
		Status			Time Comments	
ser ID	Full Name	Status		Date Comment's	Time Comments	

It has to be noted that, the user's having the Tech Scrutiny role (assigned in Permission tab) assigned will be displayed under the "Scrutiny's Team Comment" section.

Likewise, user's having the Technical Evaluator role (assigned in the Permission tab) will be displayed under the "Observation/Recommendation committee' section.

If a new user/s are added or any modifications done in the role assignment the same details will get replicated in the TCR screen.

The list of user's displayed here are not in proper sequence since system picks the user's from the permission tab. For this reason, Buyer needs to maintain the sequence for how the workflow should get triggered. Here Buyer can decide the sequence in which the TCR report should flow.

A new window will be opened consisting the list of user's based on their role assignment will be displayed as shown in screenshot below.

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	aintain Sequence for Scrutiny Workflow members							
	User Name	Full Name		User T	уре	Sequen	се	
	10100011	SIDDHASANJAY APHA	LE	А				
	10100012	PERAMPATTANALIL G	OPI	А			ź	
Jair	ntain Sequ	ence for Committe	e W	lorkfle		emhe	rs	
viali	num ocqu	chee for commu		OINIC	W II			
viali	User Name	Full Name		r Type		uence		
viali	-	Full Name					1	
viali	User Name	Full Name	Use			uence]	
viali	User Name 10100013	Full Name ARVIND APANDKAR	Use C			uence 1]	
viaii	User Name 10100013	Full Name ARVIND APANDKAR	Use C			uence 1]	

Provide the sequences and then click on "**Save Sequence**" button. Then click on "**Back to Main Screen**" button. The window will get closed and user will be re-directed to the main TCR report screen.

Now Buyer needs to click on "Forward" button as shown below.



System will display message as shown in below screenshot.

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All 🔽	1	
Vor	rkflow Started Successfully	****
SAP		Technical Comparative Statement
	5100000176	
Purch Org:	Mumbai Port Trust Purchase Organisation	

Once the Buyer has clicked on the "Forward" button the workflow will get triggered as shown in screenshot above. All the buttons below will get deactivated. Only PDF & Close buttons will be active.

Save Short Fall Docs	Maintain Workflow Sequence	Forward PDF	Close
1			

Email notification will be triggered to the respective users to approve the TCR report.

Approving TCR

Follow the process of logging to EBS portal as detailed in section 1.1

Once the user is redirected to the SRM portal through SSO, below screen will be displayed. Here the TCR report approver needs to navigate to "Home" tab and then click on "Tasks" tab. Under "Tasks" system will display

Click on the work item displayed in the tasks list as shown below.

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💇 Inbox - IPA SRM Portal	x 🚺		
	E - PROCUREMENT F	ORTAL	Log O Welcome SIDDHASANJAY APHALE (1010001 Login Time:23/07/2020 11:30.41 IS
Home Strategic Purchasin	9		
Overview			
4 Work Overview Reports Services	Alerts Tasks (4/4) Notifications Show: New and In Progress Tasks (4/4) V All V		\$ \$ ¢
Advanced Search	B Subject		⊤ Due Date
	Please Evaluate TECHNICAL COMPARATIVE REPORT for RFx 510000185 Please Evaluate TECHNICAL COMPARATIVE REPORT for RFx 510000125	Today Jun 26, 2020	New
	Please Evaluate TECHNICAL COMPARATIVE REPORT for RFx 510000125	Jun 26, 2020	New
	Please Evaluate TECHNICAL COMPARATIVE REPORT for RFx 5100000115	Jun 24, 2020	New

A new window will get displayed as shown below.

Scrutiny member can input his comments and either click on "**Submit**" button to provide his acceptance.

If there are some clarifications required from Buyer, then the scrutiny member needs to click on "**Return**" button. The workflow will be re-triggered back to Buyer and Buyer is required to provide satisfactory justification and then again trigger the workflow.

Scrutiny team also can view the comments provided by the previous members by clicking on the **"TCR pdf**" button. System will display the report in pdf format.

Click on the "Close" button to close this screen.

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🥔 Task - IPA SRM Portal - Internet Explorer - [InPrivate]
InPrivate w https://ipasdbqieq.portebs.com:50001/irj/portal?NavigationTarget=F
Please evaluate the below RFx RFx No: 5100000185
Comments from 10100011 scrutiny team member This is a free text box
Submit Return TCR PDF Close

Once the comments are submitted or the work-item is returned message "Data updated successfully" will be displayed. Please see the screenshot below.

Z Data Updated Successfully
Please evaluate the below RFx
RFx No: 5100000185
Comments from 10100011 scrutiny team member This is a free text box
Submit Return TCR PDF Close

Based on the number of user's selected for performing scrutiny activities the workflow will get triggered to the subsequent user's.

Similar steps need to be repeated by the scrutiny members to login to EBS portal and submit their recommendation's.

Once all the scrutiny members have completed their activities, the workflow will get triggered to the Review Committee members based on the sequence maintained by the Buyer.

Review committee members need to follow the steps as mentioned above from point#6.3.1 to point#6.3.5

Once all the activities are performed and all the details captured, below screenshot will be displayed.

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	Comments: Comments	to scrutiny and r	d verified from				
crutiny's T	eam Comment						
User ID	Full Name		Status	Comment's Date	Comment's Time	Comments	
10100012	PERAMPAT	TANALIL GOPI	APPROVED	23.07.2020	11:39:07	Please proceed ahead. Recommended by scrutiny team member 10100012	
10100011	SIDDHASAN	JAY APHALE	APPROVED	23.07.2020	11:36:52	Comments from 10100011 scrutiny team member This is a free text box	
bservation	/Recommendation	n committee	e's Commer	nts			
User ID	Full Name	Status	Comment's D	ate Comment's Ti	me Comments		
	MRINALINI KELKAR	APPROVED	23.07.2020	11:41:59	Reviewed by	auditor and acknowledge	
10100024						ed by review committee team member 10100013	

"Accept/Reject" buttons will get activated once the technical comparative statement/report activities are completed.

Click on "Accept" button as shown below to accept the technically qualify the bids.

Preview 🗘 Close	Export Questions and Answers (0)	System Information Create Me	mory Snapshot			
ning Time 0 Days 00:00	:00 RFx Name 10100020 22	2.07.2020 15:31:01 Type	Adv/Opn Tender 1 Env	Status Published	Number of Suppliers	3 RFx Nu
Response Activity	Surrogate Bidding	ponse Activity				
Response Activity	Surrogate bioding	Joinse Activity				
echnical RFx Responses	and Awards					
echnical RFx Responses						
echnical RFx Responses	and Awards	Company Name		Bidder Name	RF	x Response Ver
echnical RFx Responses	and Awards eject Refresh			Bidder Name FELIX ENGG. CO.	RF	x Response Ver 1
echnical RFx Responses ICR Report Accept R RFx Response	and Awards eject Refresh RFx Response Status	Company Name			RF	x Response Ver 1 1

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Initial status of RFx response will always be "Bid Submitted". Once the decision is performed. The RFx response status will get changed. The same is explained in the subsequent steps below.

Click on "**Reject**" button to technically disqualify the Bidder response.

Preview Close	Export Questions and Answers (0)	System Information Create Memory Snapshot			
ining Time 0 Days 00:00:0	00 RFx Name 10100020 22	.07.2020 15:31:01 Type Adv/Opn Tender 1 Env	Status Published	Number of Suppliers 3	RFx Nu
-					
Response Activity	Surrogate Bidding Technical Resp	Donse Activity			
		Sonse Activity			
Response Activity echnical RFx Responses TCR Report Accept Re	and Awards				
echnical RFx Responses	and Awards	Company Name	Bidder Name	RFx Re	esponse Ver
echnical RFx Responses	and Awards ject Refresh		Bidder Name FELIX ENGG. CO.	RFx Re	sponse Ver
echnical RFx Responses TCR Report Accept Re RFx Response	and Awards ject Refresh RFx Response Status	Company Name		RFx Re 1	sponse Ver

New window will be displayed wherein Buyer needs to input the reason for technically rejecting the response. Input the relevant comments. Click on **"Save Comments"** button and the click on **"Close"** button.

hnical RFx Responses				
R Report Accept R			Bidder Name	
RFx Response	RFx Response Status	Company Name	Please enter Rejection Comments	
6100000188	Bid submitted	CONAINDOSTR		
6100000185	Tech Bid Accepted	FELIX ENGG. CO	Please Enter Comments	
6100000187	Tech Bid Accepted	M/S. A. A. TRAD	Does not satisfy the technical criteria's	
			required for this activity	
			Save Comments	

Once the response is technically accepted or technically rejected, status will get changed from Bid Submitted to Tech Bid Accepted or Tech Bid Rejected. Please see the screenshot below.

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onses and Awar					Oper
review 🗘 Close	Export Questions and Answers (0) Sys	tem Information Create Memory Snapshot			
ning Time 0 Days 00:00	:00 RFx Name 10100020 22.0	7.2020 15:31:01 Type Adv/Opn Tender 1 Env	Status Published Number of	of Suppliers 3 RFx Number 5100000185	
Response Activity	Surrogate Bidding Technical Respo	nse Activity			
chnical RFx Responses	and Awards				
CR Report Accept R	eject Refresh				
RFx Response	RFx Response Status	Company Name	Bidder Name	RFx Response Version	Last Changed
		Company Name FELIX ENGG. CO.	Bidder Name FELIX ENGG. CO.	RFx Response Version	Last Changed 23.07.2020
RFx Response	RFx Response Status			RFx Response Version 1 1	
RFx Response 6100000185	RFx Response Status Tech Bid Accepted	FELIX ENGG. CO.	FELIX ENGG. CO.	RFx Response Version	23.07.2020
RFx Response 6100000185 6100000187	RFx Response Status Tech Bid Accepted Tech Bid Accepted	FELIX ENGG. CO. M/S. A. A. TRADERS,	FELIX ENGG. CO. A. A. TRADERS,	RFx Response Version 1 1 1 1 1	23.07.2020 23.07.2020
RFx Response 6100000185 6100000187	RFx Response Status Tech Bid Accepted Tech Bid Accepted	FELIX ENGG. CO. M/S. A. A. TRADERS,	FELIX ENGG. CO. A. A. TRADERS,	RFx Response Version 1 1 1 1	23.07.2020 23.07.2020

Once all the above technical activities are completed, system will automatically enable a button for initiating the price opening activity. The same is explained in the subsequent section.

Price RFx Response Activity

Initiate Price RFx Response Opening

Buyer needs to login first to the EBS portal. Please refer to section number 1.1 for login to EBS portal & SSO to SRM portal & follow the steps.

Click on "**Strategic Purchasing**" tab and then click on "**Strategic Sourcing**" link. At the right side panel in the Search criteria screen provide the RFx number and then click on "**Apply**" button.

This particular RFx will be displayed, select the RFx and click on "Display" button. Simultaneously you can also click on the RFx number to open the RFx.

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Strategic Sourcing - IPA SR			
۲	E - PROCUREMENT PORTAL	 Welcome 10100020 (10 Login Time:23/07/2020 11:4	
Home Strategic Purchasia	a		
Overview Reports			
Strategic Sourcing Contract Management	Strategic Sourcing	E	3
Business Partner Workload Redistribution	* POWL	Е,	
	Active Queries		
Services Advanced Search Create Documents * Auction * Auction Template * Rfx	RFss MI(1) Saved.(25) Anothes.Accentral.(24) Published.(32) Consistent.(33) Release Resolution) Detected.(30) Accisons MI(2) Saved.(30) Published.(11) Active.(30) Example (12) Consistent (13) Sources of the State (14) MI(14) (14) (14) (14) (14) (14) (14) (14)		
* RFx Template	RF23 - All		
Central Functions Carry Out Sourcing Upload / Migrate Certificate	Hide Guidk Citeria Maintenance Ouery has been changed Number: W (\$10000185 To	Change Guery Define New Query Personalize	
	Processed Since: Purchasing Organization: O 50000514		
Contract Management	Product Category:	1	
Business Partner	Submission Dreadline:		
Workload Redistribution	Purchase Group:		
Services	Number of RFx responses: O To		
Advanced Search	Suppler.		
Create Documents	Apply kar		
 Auction Auction Template 	View Standard Vew Create RFx Copy Display Edit Delete Publish Responses and Awards Print Preview Refresh Export	. B	
	RFx Number RFx Name Type Status RFx Category Purchasing Organization	Submission Deadline Responses	
* RPx Template	5100000185 10100020 22.07.2020 15.31.91 ZAT1 Published Mumbal Port Trust Purchase Organization	23.07.2020 3	
Central Functions			
* Carry Out Sourcing Upload / Migrate Certificate			

RFx will be visible in another window and it will be in display mode. Click on the "Initiate Price RFx Response Opening" button. This button will be active, once the Price RFx Response Opening Date & time is reached and the technical response activities are completed.

A new window will get popped-up. Provide the password and click on "Acknowledge" button.

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Display RFx :			
Edit 🖓 Initiate Price RFx Resp	ponse Opening Close Technical RFx Permiss	ons Copy Check 🕞 Discharge RFx Responses and Awards Create	Follow-on RFx Export Print P
Questions and Answers (0) Maintain R	fx Parameter 🖓 Change Price Open Date Sys	em Information Create Memory Snapshot Related Links	
	me 10100020 22.07.2020 15:31:01 Type Ad her of Items 1 Version Number 1	//Opn Tender 1 Env Status Published Created On 22.07.2020 15 Version Type Active Version External Version Number 1	5:38:46 Created By ADITI 5
RFX Information Bidders	Items Notes and Attachments Weights	a Simultaneous Logon	
RFx Parameters Questions Not	otes and Attachments		
Port Tender No: Tender Description: RFx Type:	10100020 22.07.2020 15:31:01 MBPT/2020/07/2201 THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS. Adv/Opn Tender 1 Env	* Password:	INR 60,000.00 INR Simple Price Purchase Order or Contract
Publication Type:	Public RFx	Help :	
Purchasing Group:	Mumbai Port Trust Purchase Organisation Material Mgmt Purchase Group Sho	Enter your system password for secondary verification. The password is checked against the system.	
Dates	22.07.2020		
RFx Start Date:			2
* RFx Submission Date:	23.07.2020 11:00:00	* Tender Fee:	1,200.00 INR

Below screen will get displayed and it will display the list of user's responsible for Opening the price RFx response. Click on "**Close**" button to close this window.

Display RFx :							Ope
🖉 Edit 🖏 Initiate Price RFx Res	sponse Opening Close Technical RFx Permission	Simultaneous Logon		[🗆 🗙 te Follow-o	n RFx Export Print Preview	Verify Signature
Questions and Answers (0) Maintain	Rfx Parameter 🚱 Change Price Open Date System						
	ame 10100020 22.07.2020 15:31:01 Type Adv/0 mber of Items 1 Version Number 1 V	User approval suc	cessful		15:38:46	Created By ADITI SHENDY	E Time Zone INDIA
		Process Details					
RFX Information Bidders	Items Notes and Attachments Weights a	Process Start-End T	ime: 15:45:43	- 15:50:43			
RFx Parameters Questions N	otes and Attachments	Troboso Stan-End T	10.10.10	10.00.10			
		Process Time Rema	aining				
Identification		00:04:59					
RFx Name:		Extend Process Tim	00.00.00	Extend	: INR		
Port Tender No:	MBPT/2020/07/2201 THIS PLACE HOLDER CAN BE USED	Extend Process Tim	le. 00.00.00	Extend	<	60,000.00 INR	
Tender Description:	TO CAPTURE THE LONG	Active Approvals			: Simple I	Price	
Tender Description.	DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.					se Order or Contract	
RFx Type:	Adv/Opn Tender 1 Env	User Status			: 🗹		AMC Indi
Publication Type:		User	Approved	Approval Time	: 🗹		c
		10100024		00:00:00	: 🗖		Percentage Bi
Organization		10100016		00:00:00			
	Mumbai Port Trust Purchase Organisation						Security Deposit * Security Deposit Required:
Purchasing Group:	Material Mgmt Purchase Group Show I						* Security Deposit Percentage: 8
Dates					: 🗸		· · · · -
RFx Start Date:	23.07.2020 09:30:00	🚮 Help			2		
* RFx Submission Date:	23.07.2020 11:00:00	- ·				1.200.00 INR	
Price Rfx Opening Date:	23.07.2020 11:00:00	Enter your system pa password is checked			23.07.2	020 10:20:00	
Technical RFx Response Opening Date:					20.01.2	10.20.00	
End of Binding Period:	11.0.00	Close					
End of Binding Period: Valid From / To:					.::: 🗹		
Valid From / To:	23.07.2020 - 19.01.2021						

Email notification will be triggered to the user's for performing the price RFx response activity.Confidential DocumentCopyright © 2018 Tech

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User need to follow the steps mentioned in Section#1.1 to login to EBS portal & SSO to SRM portal.

Click on "Strategic Purchasing" tab and then click on "Strategic Sourcing" link. At the right side panel in the Search criteria screen provide the RFx number and then click on "Apply" button.

This particular RFx will be displayed, select the RFx and click on "Display" button. Simultaneously you can also click on the RFx number to open the RFx.

screenshot below.

Home Strategic Purchasing		
Overview Reports	•	
Strategic Sourcing		
Contract Management	Strategic Sourcing	E
Dusiness Partner		-
Workload Redistribution	* PORL	в,
* Services	Active Queries	
Advanced Search	RFss AERE Saved.251 Awattes.Approx129 Eveloped.251 Conselect.01 Enloses.Bainstet.00 Deteted.01	
Create Documents	Auctions AL(2) Several (0) Exclusion (1) Educed (0) Ended (0) Completed (0) Sourcing Templates ALREAS (0) REP.	
* Auction	Central Contracts ALCO	
* Auction Template	Document Output (<u>Last 7 dawn (17)</u>	
• RFx	Milestone Plans AL20	
* RFx Template	RPss - All	
Central Functions	The Back Orders Mantenance Overy has been charged Charge Overy Pensor	salize
 Carry Out Sourcing 	Number 510000176	
Upload / Migrate Certificate	Number: of \$10000176 To	
	Name of RFx.	
	Status M	
Contract Management	Submission Deadline :	TŤ
Business Partner	My RFx:	
Workload Redistribution	Purchase Group:	
-	Number of vir a supporter.	
Services	Mem Poduct D	
Advanced Search	Apply Chear	
Create Documents		_
* Auction		8.
* Auction Template	RFx Number RFx Name Type Status RFx Category Purchasing Organization Submission Deadline Responses	
* RFx	5100000128 10100020 19 07 2020 19 54 38 ZSTI Published Mumbai Port Trust Purchase Organisation 20 07 2020 1	
* RFx Template		

RFx will be visible in another window and it will be in display mode.

Click on the "**Open Price RFx Response Opening**" button. This button will be active, once Buyer has initiated the price opening process.

A new window will get popped-up. Provide the password and click on "Acknowledge" button.

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Maintain Rfx Parameter System Information Create Memory Snapshot Related Links	Goscharge RFX (Responses and Awards) Create Follow-on RFX (
RFX Information Bidders Items Notes and Attachments Weights a		
RFx Parameters Questions Notes and Attachments		
Identification RFx Name: 10100020 22.07.2020 15:31:01 Port Tender No: MBPT/2020/07/2201 This PLACE HOLDER CAN BE USED To CAPTURE THE LONG Tender Description: CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS SE CHARACTERS. RFx Type: Adw/Opn Tender 1 Env Publication Type: Public RFx	User ID: 10100024 Password: Process Details Process Start.End Time: 15:45:43 - 15:50:43 Process Time Remaining 00:02:49	INR 60,000.00 INR Simple Price Purchase Order or Contract V
Organization Purchasing Organization: Mumbai Port Trust Purchase Organisation Purchasing Group: Material Mgmt Purchase Group Show T Dates RFx Start Date: 23.07.2020 09.30:00	Help Enter your system password for secondary verification. The password is checked against the system. Close	Security Deposit * Security Deposit Security Deposit 2
* RFx Submission Date: 23.07.2020 11:00:00		: 1,200.00 INR

Provide the password and click on "Acknowledge" button. Below message will be displayed and then click on "Close" button to close this window.

Simultaneous Logon	
User approval successful	
Process Details	
Process Start-End Time: 23:03:23 - 23:08:23	
Process Time Remaining	
00:03:07	
🔂 Help	
Enter your system password for secondary verification. The password is checked against the system.	
Close	
	:

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Similarly, other users can perform their activity of acknowledging the price RFx response opening. The above process is through Simultaneous logon i.e. multiple users can login and perform the activity simultaneously.

There is a possibility of extending the time for opening RFX price response. In such cases, Buyer can click again on the "**Initiate Price RFx Response Opening**" button and extend the time as shown in screenshot below.

A new window will get opened. Provide the time either in hours / minutes or seconds to extend the process.

Click on "Extend" button. System will extend the timings accordingly.

Display RFx <mark>:</mark>					
Close Techr	nical RFx Permission	Simultaneous Logon	U		
Questions and Answers (0) Maintain Rfx Parameter	e Open Date Systen				
RFx Number 5100000185 RFx Name 10100020 22.07.2020 15.3 Number of Suppliers 3 Number of Items 1 Version I		Process Details			
RFX Information Bidders Items Notes and Attach	ments Weights a	Process Start-End T	ime: 15:45:43	- 15:50:43	
RFx Parameters Questions Notes and Attachments		Process Time Rema	aining		
Identification RFx Name: 10100020 22.07.2020 15:31:01 Port Tender No: MBPT/2020/07/2201	1	00:01:21 Extend Process Tim	e: 00:01 00	Exten	d
THIS PLACE HOLDER CAN B Tender Description: TO CAPTURE THE LONG		Active Approvals			
FIELD LENGTH IS 256 CHAR		User Status			
RFx Type: Adv/Opn Tender 1 Env	1	User	Approved	Approval Time	
Publication Type: Public RFx		10100016		00:00:00	
Organization					
Purchasing Organization: Mumbai Port Trust Purchase O	rganisation				
Purchasing Group: Material Mgmt Purchase Group	p Show N				
Dates					
RFx Start Date: 23.07.2020 09:30:00		🔂 Help			
* RFx Submission Date: 23.07.2020 11:00:00		Enter your system pa			
Price Rfx Opening Date: 23.07.2020 11:00:00		password is checked	against the system	n.	
Technical REx Response Opening Date: 23.07.2020 11:00:00		Close			

In the given example the time is extended by 1 minutes. System has calculated the revised time as shown in screenshot below.

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Process Details							
Process Start-End Til	me: 15:45:43	- 15:50:43					
Process Time Rema	ining						
00:01:21				Pro	cess Time Rema	ining	
Extend Process Time Active Approvals	00:01 00	Exter	IN Sii	Ext	01:46 end Process Time ive Approvals	e: 00:01:00	Exter
User Status			Pu	ACI	ive Approvais		
User	Approved	Approval Time		Us	er Status		
10100016		00:00:00			User	Approved	Approval Time
					10100016		00:00:00

The button "Initiate Price Rfx Response Opening" will get disappeared automatically once all the members has acknowledged for opening the price in system as seen in screenshot below.

Display RFx :						Open
	echnical RFx Permissions Copy Check		Awards Create Follow-on	RFx Export Print Preview	Verify Signature Questions and Answe	rs (0) Maintain Rfx Parameter
RFx Number 5100000185	RFx Name 10100020 22:07:2020 15:31:01	lype Adv/Opn Lender 1 Env	Status Published	Created On 22.07.2020 15:3	38:46 Created By ADITI SHENDYE	lime Zone INDIA

Price Comparative Statement

Now we need to perform the PCR activity as this is a common process to be performed for all tender types.

There is always as possibility that the tender committee members may be required to change due to nonavailability or transfer etc. In such scenarios, Buyer can always modify the user's in the Permission Tab. New users can be added or for the existing user's the roles can be modified.

To access the PCR report, click on "Response and Awards" button as mentioned in the below screenshot.

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Display RFx :			Open s
	x Permissions Copy Check 🔓 Dischart nformation Create Memory Snapshot Relat	rge RFx Responses and Awards Create Follow-on RFx Export Print Previee	w Verify Signature Questions and Answers (0) Maintain Rfx Parameter
	nme 10100020 22.07.2020 15:31:01 Typ nber of Items 1 Version Number	e Adv/Opn Tender 1 Env Status Published Created On 22.07.2020 1 Version Type Active Version External Version Number 1	5:38:46 Created By ADITI SHENDYE Time Zone INDIA
RFX Information Bidders	Items Notes and Attachments W	eights and Scores Approval Tracking	
RFx Parameters Questions N	otes and Attachments		
Identification		Event Parameters	
RFx Name:	10100020 22.07.2020 15:31:01	Currency:	INR
Port Tender No:	MBPT/2020/07/2201	Target Value;	60.000.00 INR
Tender Description:	THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.	Detailed Price Information: Follow-On Document:	Simple Price Purchase Order or Contract
RFx Type:	Adv/Opn Tender 1 Env	Bidder Can Change RFx Responses:	
Publication Type:		Allow Multiple RFx Responses for Each Company:	QSB
i annother i jpe.		Display Weighting to Bidders:	Percentage Biddin
Organization			
Purchasing Organization:	Mumbai Port Trust Purchase Organisation	Tender Fee	Security Deposit
Purchasing Group:	Material Mgmt Purchase Group	Show Members	* Security Deposit Required: 🗸
			* Security Deposit Percentage: 8
Dates		Required:	V
RFx Start Date:	23.07.2020 09:30:00	Tender Fee Percentage:	
* RFx Submission Date:	23.07.2020 11:00:00		1.200.00 INR
N X Submission Bute.	23.01.2020 11.00.00	* Tender Fee:	1,200.00 INK

A new window will get opened. Select the "**Response Comparison**" tab and click on the "**PCR Report**" button. Please see screenshot below. The list will consists of only technically qualified bidder responses.

Esponses and Awards rint Preview ☆ Close Export Questions and Answers (0) System Information Create Memory Snapshot										
uppliers 3 RFx Number 5100000185	Env Status Published Number of Suppl	0020 22.07.2020 15:31:01 Type Adv/Opn Tend	0 Days 00:00:00 RFx Nam							
		vanced Comparison	se Activity Response Comparison							
Bidder Name	Company Name	Response Version	se Number							
FELIX ENGG. CO.	FELIX ENGG. CO.	1	0185							
A. A. TRADERS,	M/S. A. A. TRADERS,	1	<u>0187</u>							
	M/S. A. A. TRADERS,	1	0187							

A new window will be displayed as shown below. Buyer needs to maintain his comments in the "**Overall Comments**" column and then click on "**Save**" button.





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		ive Statement											
S.N	io. Descrip	ption of the work		Unit	aty	Trust Estimate Rate/Unit	Trust Estimate Amount in Rs	ALR (Abnormally Low Rate above -25%)	AHR (Abnormally High Rate above +25%)	FELIX ENGG. CO. Rate/Unit	FELIX ENGO. CO. Amount in Rs	M/S. A. A. TRADERS, Rate/Unit	M/S. A. A. TRADERS, Amount in Rs
1	Cal/Sta	@Survey Maint by E	demai Ven	for AU	1.00	0.00	0.00			0.00	0.00	0.00	0.00
2	Two Co	oats - Oil Bound Dist	temper	M2	3.00	20000.00	60000.00			19000.00	57000.00	19500.00	58500.00
	Differ to	rom Estimate Cost(in	n %)								5.00-		2.50-
	BASIC	COST											
	TOTAL										57000.00		58500.00
	ORDER	R OF MERIT									Rank 1		Rank 2
uyer's	s Comme	ents											
		Forwarding	to Price Sc	rutiny and F	Review								
uyer's C	Overall Comm	nents:	members										
L	Jser ID	m Commen Full Name LATA DATE				Comment's Time	Comments						
L	Jser ID	Full Name					Comments						
L	Jser ID	Full Name					Comments						
L	Jser ID	Full Name					Comments						
1	Jser ID 10100019	Full Name	Status	Comme			Comments						
i omr	Jser ID 10100019	Full Name	Status	Comme		00.00.00	Comments Ts Time Comm	nents					
i omr	User ID 10100019 mittee C	Full Name LATA DATE	Status	Comme		00.00.00		nents					
L 1 Comr L	mittee C	Full Name LATA DATE	Status Remari	Comme		00.00:00 Date Comment		nents					
L 1 Comr L	mittee C Jser ID 10100019	Full Name LATA DATE	Status Remari	Comme		00.00:00 Date Comment 00:00:00		nents					
L 1 Comr L	mittee C Jser ID 10100019	Full Name LATA DATE	Status Remari	Comme		00.00:00 Date Comment 00:00:00		nents					

The price comparative report also contains the list of user's responsible for performing the Scrutiny and review committee activities.

These users are determined based on those maintained in Permission tab.

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		Status	0011111	ent's Date	Comme	ent's Time C	Comm	ento		
10100019	LATA DATE				00:00:0	00				
mittee C User ID	Comments / Full Name	Remai	'ks Status	Comment	's Date	Comment's 1	Time	Comments		
10100024	MRINALINI K	ELKAR				00:00:00				
10100017	MUKESH NA	WANI				00:00:00				

Once the overall comments are saved, Buyer needs to click on "Maintain Workflow Sequence" button.

User ID	Full Name	Status	Comme	ent's Date	Comme	ent's Time	Commer	ts			
10100019	LATA DATE				00:00:0	00					
nmittee (comments /	Remar	ks								
User ID	Full Name		Status	Comment	's Date	Comment's	Time	Comments			
User ID 10100024	Full Name MRINALINI K	ELKAR	Status	Comment	's Date	Comment's	Time	Comments			
			Status	Comment	's Date		Time	Comments			

A new window will get opened. Provide the sequences and then click on "Save Sequence" button. Then click on "Back to Main Screen" button. The window will get closed and user will be re-directed to the main PCR report screen.

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SAP						 Maintain Sequence for Scrutiny and committee Member's
laintain	Seque	ence for Scru	utiny	Workfl	ow Memb	
User N		Full Name		er Type	Sequence	
10100	019	LATA DATE	А		1	
					-	
User N		Full Name		User Typ		
10100	024	MRINALINI KELI	KAR	С		
10100	017	MUKESH NAWA	NI	С		

Now Buyer needs to click on "Forward" button as shown below to trigger the workflow.

Save	Maintain Workflow Sequence	Forward	PDF	Close

System will display message as shown in below screenshot.

Z PCR for ALR and AHR	× 📑
All 🗹 1	
✓ Workflow Started Suc	cessfully
SAP	Price Comparative Statement
Rfx No: 5100000185	

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Approving PCR

Follow the process of logging to EBS portal as detailed in section 1.1

Once the user is redirected to the SRM portal through SSO, below screen will be displayed. Here the PCR report approver needs to navigate to "Home" tab and then click on "Tasks" tab. Under "Tasks" system will display

Click on the work item displayed in the tasks list as shown below.

	E - Procurement	t Portal	Log (Welcome LATA DATE (101000) Login Time:22/07/2020 09:32.19 I
Home Strategic Purchasi	ng		
4 Work Overview Reports	Alerts Tasks (3 / 3) Notifications Show: New and in Progress Tasks (3 / 3) V All V		\$ F (C)
Services Advanced Search	문 Subject	Sent Date v Due	
	Please Evaluate PRICE COMPARATIVE REPORT for FX 5100000176 Please Evaluate PRICE COMPARATIVE REPORT for rX 5100000115 Please Evaluate PRICE COMPARATIVE REPORT for rX 510000015	Jul 20, 2020 Jun 24, 2020 Jun 24, 2020	New New New

A new window will get displayed as shown below.

Scrutiny member can input his comments and either click on "Submit" button to provide his acceptance.

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E	Log (2 - PROCLIRFMFNIT PORTAL @ Task - IPA SRM Portal - Internet Explorer − □ × 191
Home Strategic Purchasing	207 https://ipasdbgieg.portebs.com/50001/iij/portal?NavigationTarget=ROLES%3A%2F%2Fportal_content%2Fevery_user%2Fgeneral%2Fuwl%2Fcom.sap.netw
Overview Work Overview Reports Services Advanced Search Please Evaluate PRICE COMPARATIVE REP Please Evaluate PRICE	Please evaluate the below RFx RFx No: [S10000178] Reviewed by 1010019 review committee and recommended to proceed further] Submit Return PCR PDF Close

If there are some clarifications required from Buyer, then the scrutiny member needs to click on "Return" button. The workflow will be re-triggered back to Buyer and Buyer is required to provide satisfactory justification and then again trigger the workflow.

Scrutiny team also can view the comments provided by the previous members by clicking on the "PCR pdf" button. System will display the report in pdf format.

Click on the "Close" button to close this screen.

E	PROCLIREMENT PORTAL Welcome LATA DATE (10) Welcome LATA DATE (10) Task - IPA SRM Portal - Internet Explorer - - ×
Home Strategic Purchasing Overview Work Overview Reports Services Advanced Search Please Evaluate PRICE COMPARATIVE REP Please Evaluate PRICE COMP	Reviewed by 10100019 review committee and recommended to proceed further. Submit Return PCR PDF Close







Once the comments are submitted or the work-item is returned message "Data updated successfully" will be displayed. Please see the screenshot below.

🥔 Task - IPA SRM Portal - Internet Explorer	- [ב
https://ipasdbqieq.portebs.com:50001/irj/portal?NavigationTarget=F	OLES%3A%2F%2Fportal_content%2Fevery_user%2Fgeneral%2Fuwl%2Fcom.	sap
		O
Data Updated Successfully		
Please evaluate the below RFx		
RFx No: 5100000176		
Reviewed by 10100019 review committee and recommended to proceed further.		
Submit Return PCR PDF Close		

Based on the number of user's selected for performing review committee activities the workflow will get triggered to the subsequent user's.

Similar steps need to be repeated by the other review committee members to login to EBS portal and submit their recommendation's.

Once all the review committee members have completed their activities, the PCR process will be completed.

Based on the comments received from the review committee, Buyer i.e. the tender creator has to perform the further activities of initiating the awarding for the L1 bidder.

Initiation for awarding is explained in the next section.

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	/					P	Price Comparative	e stakement		
		5100000176								
		Mumbal Port Tr	ust Purchase Or	ganisation						
ce	Comp	parative State	ement							
	S.No. (Description of the	work	Unit	Qty		Trust Estimate Rate/Unit	Trust Estimate Amount in Rs	FELIX ENGG. CO. Rate/Unit	FELIX ENGG. CO. Amount in Rs
R	1 F	Preventive Maint I	y External Ven	tor AU		1.000	0.00	0.00	0.00	0.00
1	2 1	Two Coats - Oil B	ound Distemper	M2	3	10.000	16000.00	160000.00	1000.00	10000.00
	F	Ranking For Item								Rank 1
		Differ from Estima	te Cost(in %)							93.75-
		BASIC COST								
		TOTAL								10000.00
		ORDER OF MER								Rank 1
		omments	invarding to Pri mmittee, asdfa	ie scrutiny idf	and review					
		Compose	mmittee asdfa	idf	and review					
rut		Fr	mmittee asdfa	ks	and review		ent's Time Comm	ents		
rul	tiny Te	am Commer	ennittee acdta	ks	nt's Date		21 Review	rents wed by 10100019 ren id furtber.	view committee and	I recommended to
rul	tiny Te	am Commer	mmillee acdfa nts / Remar Status	ks Comme	nt's Date	Comme	21 Review	ved by 10100019 ret	New committee and	I recommended to
rut	tiny Te User ID 10100015	am Commer	nts / Remar Status APPROVED	ks Comme	nt's Date	Comme	21 Review	ved by 10100019 ret	New committee and	I recommended to
rut	tiny Te User ID 10100015	eam Commer Full Name 9 LATA DATE	nts / Remar Status APPROVED	ks Commen 22.07.20	nt's Date	Commo 09:38:2	21 Review	ved by 10100019 ret	New committee and	I recommended to
rut	tiny Te User ID 10100015	Comments / Full Name	nts / Remar Status APPROVED Remarks Statu	ks Commer 22.07.20	nt's Date	Commo 09:38:2 s Date	21 Review proces	ved by 10100019 ren of further.	New committee and	

Award Response

Buyer i.e. tender creator once receives review comments and recommendations from the committed the next step is to initiate for awarding the L1 bidder.

To do this activity, Buyer needs to login to the EBS portal by following the steps mentioned in section 1.1

Under the POWL screen, user can search for the particular RFx or select the particular RFx from the dashboard and click on "Display" button. The other way, is to click on the RFx number link to display the RFx.

RFx will be displayed in another screen. Click on the "Response and Awards" button as shown below.

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RFx	Number 5100000185 RFx Na Number of Suppliers 3 Num RFX Information Bidders	formation Create Memory Snapshot Relat me 10100020 22.07.2020 15:31:01 Typ nber of Items 1 Version Number 1		Open s ind Answers (0) Maintain Rfx Parameter HENDYE Time Zone INDIA
	RFx Name: Port Tender No: Tender Description: RFx Type: Publication Type:		Currency: INR Target Value: 60,000.00 INR Detailed Price Information: Simple Price Follow-On Document: Purchase Order or Contract Bidder Can Change RFx Responses: Allow Multiple RFx Responses for Each Company: Display Weighting to Bidders:	AMC Indical QSE Percentage Biddii
Org Date	Purchasing Group:	Material Mgmt Purchase Group 23.07.2020 09:30:00	Tender Fee Show Members Required: Tender Fee Percentage: 2 * Tender Fee: 1,200.00 INR	Security Deposit * Security Deposit Required: 🔽 * Security Deposit Percentage: 8

A new screen will be displayed as shown below. Go to the "Response Comparison tab and click on "Compare All Responses" button.

Alternative Thinking

-							
Respo	onses and Awards						
Print Pr	review 🗘 Close Export Questions and Answers	(0) System Information Create Memory Snapshot					
Remain	ning Time 0 Days 00:00:00 RFx Name 1010	0020 22.07.2020 15:31:01 Type Adv/Opn Tender 1 En	V Status Published Number of Suppliers 3 RFx Num	ber 5100000185			
	Response Activity Response Comparison Su	rrogate Bidding Technical Response Activity					
C	Compare Selected Responses Compare All Responses	dvanced Comparison					
R	Response Number	Response Version	Company Name	Bidder Name			
	•						
	<u>6100000185</u>	1	FELIX ENGG. CO.	FELIX ENGG. CO.			
	<u>6100000187</u>	1	M/S. A. A. TRADERS,	A. A. TRADERS,			
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inuentiai	2000		copyright @ 2018 rech				
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A new screen will be displayed as shown below. Click on "Edit" button to proceed further to award the RFx response.

dit Print Preview			eate Memory Snapshot	
aining Time 0 Days	00:00:00 RFx Nam	ne 10100020 22.07.2020 15:31:01 Type Adv/	Opn Tender 1 Env Status Published Numbe	r of Suppliers 3 RFx Number 510000
Response Activity	Response Comparison	Surrogate Bidding Technical Response	Activity	
Dieplay Biddere Com	parison Date: 23.07.2020	Back to Decourse Comparison Main View	Generate PDF Download Response Comparison	
Display Didders	pundon Duro. 20.07.2020			
			Expand All Collapse All	
Header/Item No.	Item/Attributes	FELIX ENGG. CO. : FELIX ENGG. CO. : Submitted	A. A. TRADERS, : M/S. A. A. TRADERS, : Submitted	
 Header 	Description	10100020 22.07.2020 15:31:01	10100020 22.07.2020 15:31:01	
	RFX Response Number	610000185	6100000187	
	Overall Bidder Rank	1	2	
	Bidder Name	FELIX ENGG. CO.	A. A. TRADERS,	
	Bidder Number	40000442	40000444	
	Submission date and time	23.07.2020 11:45:58	23.07.2020 11:46:01	
	Currency	INR	INR	
	Total Value	57,000.00	58,500.00	
	Deviation From RFx Response	0.000 %	2.632 %	
	Accept			
Item:	Short Text	Cal/Stat/Survey Maint by External Vendor	Cal/Stat/Survey Maint by External Vendor	
🕨 🕈 Item:	Short Text	Two Coats - Oil Bound Distemper	Two Coats - Oil Bound Distemper	
Total Accepted Items V	alue:	0.00		

After user Edit's, Accept field check box will be enabled. Check the box and then click on "Award" button as shown below.

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int Preview Clo	se Display Award	Export Question	ons and Answers (0)	System Information	Create Memory Snap	pshot	
emaining Time 0 D	ays 00:00:00	RFx Name 1	0100020 22.07.2020	15:31:01 Type	Adv/Opn Tender 1 Env	Status Published	Number
Response Act	ivity Response	Comparison	Surrogate Bidding	Technical Res	oonse Activity		
Display Bidders	Comparison Date: 23	07.2020	Back to Respon	se Comparison Main	View Generate PDF	Download Response Com	nparison
						Expand All C	Collapse All
Header/Item N	lo. Item/Attributes	FE	LIX ENGG. CO. : FEL	IX ENGG. CO. : Subr	mitted A. A. TRADERS	S, : M/S. A. A. TRADERS, :	: Submitted
Header	Description	10	100020 22.07.2020 15	5:31:01	10100020 22.07	7.2020 15:31:01	
Titem:	Short Text	Ca	//Stat/Survey Maint by	/ External Vendor	Cal/Stat/Survey	Maint by External Vendor	
	Delivery date	31.	12.21		31.12.21		
	Item-Level Rank			1		2	
	Unit	LE			LE		
	Net value	57,	000.00		58,500.00		
	Quantity			1		1	
	Lot-Level Rank			1		2	
	Product Cat.	72	00000		7200000		
	Currency	INF	ર		INR		
	Deviation From R	Fx Response 0.0	00 %		2.632 %		
	Accept	v					
👻 🚔 Item:	Short Text	Tw	o Coats - Oil Bound D	Distemper	Two Coats - Oil	Bound Distemper	
	Delivery date	31	12.21		31.12.21		

The response will be accepted in the system and it will follow an approval process. Below message will be displayed once the RFx response is awarded in system.

Re	esponses and A	wards							
6	Edit Print Preview	v 🗘 Clos	e Export Quest	ons and Answers (0) S	ystem Informati	on Create I	Aemory Snaps	hot	
 Image: A set of the set of the	RFx response 61000001	85 (10100020 22	.07.2020 15:31:01)	accepted					
R	Remaining Time 0 Days	00:00:00	RFx Name	10100020 22.07.2020 15:3	31:01 Тур е	e Adv/Opn T	ender 1 Env	Status Published	Number of Supplier
	Response Activity	Respons	e Comparison	Surrogate Bidding	Technical Re	esponse Activ	ity		
	Display Bidders Com	nparison Date: 2	3.07.2020	Back to Response C	Comparison Mai	n View Ge	nerate PDF	ownload Response Compa	arison
								Expand All Collapse Al	
	Header/Item No.	Item/Attributes	FELIX ENGG. CO	FELIX ENGG. CO. : Awa	aiting Approval	A. A. TRAD	ERS, : M/S. A.	A. TRADERS, : Submitted	
	Header	Description	10100020 22.07.2	020 15:31:01		10100020 2	2.07.2020 15:	31:01	
	Item:	Short Text	Cal/Stat/Survey M	aint by External Vendor		Cal/Stat/Su	rvey Maint by I	External Vendor	
	🕨 🚔 Item:	Short Text	Two Coats - Oil B	ound Distemper		Two Coats	- Oil Bound Dis	stemper	
	Total Accepted Items V Best Bid Value:	alue:	57,00 57,00						
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				All rights reserv					
ccept	ing No Limits	1	Alterna	tive Thinking		Drivi	ng Posi	tive Change	





Buyer can check the approvers under the "Approval" tab as shown in screenshot below.

<i>∪і</i> ѕріау к⊦х і	kesponse:							
Show My Tasks	Print Preview Close	Technical RFx Response Export LO.	A System Information Cr	eate Memory Snapshot				2
RFx Response Nu	mber 6100000185 RFx Name	10100020 22.07.2020 15:31:01	Status Awaiting Approval	Supplier Name FELIX ENGG. CO. T	otal Value	57,000.00 INR RI	Fx Number <u>510000018</u>	<u>15</u>
Rfx Informat	ion Items Notes and Attac	hments Approval Tracking						
	tatus: Active		Header Approval Note					
	Step: SRM RFx Response/Bid App	proval						
Currently Processe	ed By: MANDAR PARKAR							
Approval Process	Data: Download as XML							
Follo	w Up: 📃 Work Item to Requester at	Process End						
Header	Item							
Header Appro	oval Status							
Add Approve								
Sequence	Process Step	Level Status	Status	Processor Determination		Processor	Received On	Processed On F
• 001	SRM RFx Response/Bid Approval	Active (Assigned Process is Running)	Open (No Decision Made)	Get Manager of P. Group (Header) for Appr. f	or RFx Response	MANDAR PARKAR	23.07.2020 13:06:59	
					L			

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RFx Response Approval

Approver needs to login to EBS portal and follow steps mentioned in section 1.1

RFx Response Approver need to navigate to "Home" tab and then select the "Tasks" tab. The work item will be visible as shown below.

CONTRACTOR AND			Log C Welcome MANDAR PARKAR (1010001
	E - Procurement F	ORIAL	Login Time:23/07/2020 13:11.19 I
Home Strategic Purchasi	ng		
Overview			
Work Overview	Alerts Tasks (10 / 10) Notifications		
Reports Services	Show: New and In Progress Tasks (10 / 10)		\$ 7 C
Advanced Search	E Subject	Sent Date ₹ Du	e Date 🚊 Status 🦾
	Approve RFx Response 10100020 22:07:2020 15:31:01 Number 6100000185	Today	New
	Approve RFx Number 5100000131	Jul 2, 2020	New
	Approve RFx Number 5100000123	Jun 26, 2020	New
	Approve RFx Number 5100000098	Jun 21, 2020	New
	Approve RFx Number 5100000097	Jun 21, 2020	New
	Approve RFx Number 5100000108	Jun 21, 2020	New
	Approve RFx Number 5100000107	Jun 21, 2020	New
	Approve RFx Number 5100000104	Jun 21, 2020	New
	Approve RFx Number 5100000100	Jun 21, 2020	New 🔍
	Approve RFx Response 10100021 16.06.2020 22:55:11 Number 6100000064	Jun 17, 2020	

Click on the **"Approve RFX Response 61xxxxxx**" link. A new screen will get displayed. Click on **"Approve**" button. Once approved, Buyer i.e. tender creator will be able to create Purchase Order or Contract against this L1 response.

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Approve RFx Response:	
Approve Reject Print Preview Close Save LOA System Information Crea	te Memory Snapshot
RFx Response Numbe 6100000185 4ame 10100020 19.07.2020 19:54:38	Status Awaiting Approval Supplier Name FELIX ENGG. CO. Total Value 10,000.00 INR RFx Number 5100000176
Rtx Information Items Notes and Attachments Approval Trackin	27
General Data Notes and Attachments Questions Messages	
United that and Automatics Automatics interages	
▼ Basic Data	
Bidder Contact Information	RFx Response Information
Supplier Name: FELIX ENGG. CO.	Last Changed On: 20.07.2020 19:57:42 INDIA
Contact Person Name: FELIX ENGG. CO.	Last Changed By: ADITI SHENDYE
E-Mail: ag00615222@techmahindra.com	Creation Date: 20.07.2020 13:44:49 INDIA
Fax	Created By: Mr. FELIX ENGG. CO.
Phone: 123456789	
Event Parameters	Service and Delivery
Process Type: QUOT	Incoterm:
Currency: Indian Rupee	
Detailed Price Information: Simple Price	Status and Statistics
Follow-On Document: Purchase Order or Contract	Created On: 20.07.2020 13:44:49 INDIA
Target Value of RFx in Original Currency: 160,000.00 INR	Created By: Mr. FELIX ENGG. CO.
Target Value of RFx in Selected Currency: 160,000.00 INR	Last Processed On: 20.07.2020 19:57:42 INDIA
Net Value of Header Items: 10,000.00 INR	Last Processed By: ADITI SHENDYE
Terms of Payment:	Port Tender No: MEPT/2020/07/230
	LONG TENDER DESCRIPTION. THIS
Organization	TURNE TORCE OF A TURNE
Display RFx Response:	
Show My Tasks Print Preview 🕼 Close Technical RFx Response	Export LOA System Information Create Memory Snapshot
Action performed successfully	
RFx Response Number 6100000185 RFx Name 10100020 22.07.2020	15:31:01 Status Awaiting Approval Supplier Name FELIX ENGG. CO. Total Value 57,000.00 INR
Rfx Information Items Notes and Attachments Approva	l Tracking
General Data Notes and Attachments Questions Messages	
▼ Basic Data	
Bidder Contact Information	RFx Response Information
Supplier Name: FELIX ENGG. CO.	Last Changed On: 23.07.2020 13:06:57 INDIA
Contact Person Name: FELIX ENGG. CO.	Last Changed By: ADITI SHENDYE
E-Mail: ag00615222@techmahindra.com	Creation Date: 23.07.2020 09:51:53 INDIA
Fax:	Created By: Mr. FELIX ENGG. CO.
Phone: 123456789	

Create Purchase Order

This is a final step wherein Buyer will be converting the response for the L1 bidder to either

Purchase order / Service Order or Contract. To perform this activity, Buyer needs to login to the EBS portal by following the steps mentioned in section 1.1

Under the POWL screen, user can search for the particular RFx or select the particular RFx

from the dashboard and click on "Display" button. The other way, is to click on the RFx number link to display the RFx.

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SAP User Manual for Calibration/Statutory/Survey Maintenance

Home Strategic Purchasing		
Overview Reports	n	
Strategic Sourcing		
Contract Management	Strategic Sourcing	E
Business Partner		
Workload Redistribution	* POWL	а,
* Services	Active Queries	
Advanced Search	RFxx Ad (M) Saved (25) Availing Approval (26) Published (26) Completed (2) Release Rejected (2) Deleted (2)	
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* RFx	Milestone Plans AL (20)	
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 Carry Out Sourcing 	Number: 9 S100008176 To	
Upload / Migrate Certificate	FFx Type	
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	Wear Standard Verv Cosule RFx Object Display Cdt Debte Publish Responses and Awards Prot Proview Refersh Export _ J IP: RFx Number RFx Name Type Status RFx Category Purchasing Organization Submission Deadline Responses \$200000125 \$10002019 87:2020 19:54:38 ZSTI Published Mumbar Port Trust Purchase Organization 28:07:2020 19:07:2020	2

RFx will be displayed. Click on the "Response and Awards" button.

Display RFx :					
Initiate Price RFx Resp	ponse Opening Close Technical RFx Per	rmissions Copy Check 🔓 Discharge P	Fx Responses and Awards C	reate Follow-on RFx Export Print Pr	review Verify Signature
	Rfx Parameter SA Change Price Open Date			//	
		_,,			
RFx Number 5100000176 RFx Nar	me 10100020 19.07.2020 19:54:38 Type	e Single Tender Status Published	Created On 19.07.2020 19:56	:18 Created By ADITI SHENDYE	Time Zone INDIA
Number of Items 1 Version		-			
			_		
RFX Information Bidders	Items Notes and Attachments We	leights and Scores Approval Tracki	ng		
RFx Parameters Questions No	otes and Attachments				
Identification		Event Paran	neters		
	10100020 19.07.2020 19:54:38	Event i ala		ncy: INR	
	MBPT/2020/07/230	1			
For Fonder No.	LONG TENDER DESCRIPTION. THIS		Target Va	alue: 160,000.00 INR	
Tandas Danaintinas	TENDER TYPE IS USED FOR		Detailed Price Information	tion: Simple Price	
Tender Description:	PROPRIETARY / OEM VENDORS. THIS		Follow-On Docum	ent: Purchase Order or Contract	
	FIELD IS OF 256 CHARACTERS.		Bidder Can Change RFx Respon	ses: 🗸	
	Single Tender	Allow Multipl	e RFx Responses for Each Comp	any: 🗹	
Publication Type:	Restricted RFx		Display Weighting to Bidd	lers:	
Organization	Murchail Bard Truck Durahana Organization				
Purchasing Organization:	Mumbai Port Trust Purchase Organisation	Tender Fee			Security Depo
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A new screen will be displayed as shown below. Go to the "**Response Comparison**" tab and then click on "**RFx Response number**" link.

nt Preview 🕼 Close Create Follow-on RFx Export Questions and Answers (0) System Information Create Memory Snapshot							
emaining Time 0 Days 00:00:00 RFx Name 10100020 22:07:2020 15:31:01 Type Adv/Opn Tender 1 Env Status Published Number of Suppliers 3 RFx Number 5100000185							
Response Activity Response Comparison Surrogate Bidding Technical Response Activity							
Response Activity	Response Companson	Surrogate bloding	Response Activity				
Details Response On Beh		tract Mass Update	Response Activity				
			Bidder Name	Intent	Response Version	Last Changed on	Res
Details Response On Beh	nalf 🛛 Return Response Con	tract Mass Update		Intent	Response Version	Last Changed on 23.07.2020	Res
Details Response On Beh Response Number	nalf) Return Response Con Response Status	tract Mass Update Company Name	Bidder Name		Response Version	-	Res

RFx response will get displayed in another screen as shown below.

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				Options 🔻
Display RFx Response:				
Print Preview 🗘 Close Technical	RFx Response Export Create Purchase Order Simulate and Create	Purchase Order Create Contract Publish To Catalog	Undo Accept LOA System Information C	Create Memory Snapshot 🛛 👔 🖌
RFx Response Number 6100000185	RFx Name 10100020 22.07.2020 15:31:01 Status Accepted	Supplier Name FELIX ENGG. CO. Total Value	57,000.00 INR RFx Number 510000	<u>)0185</u>
Rfx Information Items N	otes and Attachments Approval Tracking			
General Data Notes and Attachments	Questions Messages			
▼ Basic Data				
Bidder Contact Information		RFx Response Information		
Supplier Name: FELIX ENGG. CO		Last Changed On: 23.07.2020 13:13:		
Contact Person Name: FELIX ENGG. CO		Last Changed By: MANDAR PARKA Creation Date: 23.07.2020 09:51:		
E-Mail: ag00615222@tecl Fax:	Imanindra.com	Created By: Mr. FELIX ENGG.		
		Greated by. MIL FELIX ENGO.	00.	
Phone: 123456789				
Event Parameters		Service and Delivery		
Process Type:	QUOT	Incoterm:		
Currency:	Indian Rupee			
Detailed Price Information:	Simple Price	Status and Statistics	i	
Follow-On Document:	Purchase Order or Contract	Created On:	23.07.2020 09:51:53 INDIA	
Target Value of RFx in Original Currency:	60,000.00 INR	Created By:	Mr. FELIX ENGG. CO.	
Target Value of RFx in Selected Currency:	60,000.00 INR	Last Processed On:	23.07.2020 13:13:03 INDIA	
Net Value of Header Items:	57,000.00 INR	Last Processed By:	MANDAR PARKAR	
Terms of Payment:		Ded Tender No.	MBPT/2020/07/2201	
		Poit Tender No.	THIS PLACE HOLDER CAN BE USED	
Organization	O 50000634 Mumbai Port Trust Purchase Organisation		TO CAPTURE THE LONG	
····,·····		Tender Description:	DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.	
Responsible Purchasing Group:	O 50000767 Material Mgmt Purchase Group		TIEED EENOTTI O 200 OTRICKOTEKO.	
Pre-Bid Location:	MUMBAI PORT - CME DEPARTMENT	Pre-Bid End Date	22.07.2020	~
		Dra Rid End Time	16:00:00	

Click on "Create Purchase Order" button.

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						0
Display RFx Response:						
	RFx Response Export Create Purchase Orde	r Simulate and Create Purchase Order Cre	eate Contract Publish To Catalog	Undo Accept LOA S	ystem Information Create Memory Snaps	hot
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Supplier Name: FELIX ENGG. CO.			st Changed On: 23.07.2020 13:13:0			
Contact Person Name: FELIX ENGG. CO.		La	ast Changed By: MANDAR PARKAR			
E-Mail: ag00615222@tech	hmahindra.com		Creation Date: 23.07.2020 09:51:5			
Fax:			Created By: Mr. FELIX ENGG.	CO.		
Phone: 123456789						
Event Parameters			Service and Delivery			
Process Type:	QUOT		Incoterm:			
Currency:	Indian Rupee					
Detailed Price Information:	Simple Price		Status and Statistics			
Follow-On Document:	Purchase Order or Contract		Created On:	23.07.2020 09:51:53 IN	DIA	
Target Value of RFx in Original Currency:	60,000.00 INR		Created By:	Mr. FELIX ENGG. CO.		
Target Value of RFx in Selected Currency:	60,000.00 INR		Last Processed On:	23.07.2020 13:13:03 IN	DIA	
Net Value of Header Items:	57,000.00 INR		Last Processed By:	MANDAR PARKAR		
Terms of Payment:						
			Port Tender No:	MBPT/2020/07/2201		

A new window will get popped-up, select the transaction type and then click on "Create Purchas Order" button.

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Display RFx Response:						
Print Preview 🕼 Close Technical	RFx Response Export Create Purchase Order	Simul	ate and Create Purch	ase Order Create Co	ntract	Publish To Catalog LOA System Information Create Memory Snapshot
RFx Response Number 6100000185	RFx Name 10100020 22.07.2020 15:31:01 S	tatus	Accepted Sup	plier Name FELIX ENG	G. CO.	D. Total Value 57,000.00 INR RFx Number 5100000185
Rfx Information Items No	otes and Attachments Approval Tracking					
General Data Notes and Attachments	Questions Messages					
		Cn	eate Purchase Orde			×
▼ Basic Data						
Bidder Contact Information		Se	ect from the following	transaction types:	_	ormation
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Contact Person Name: FELIX ENGG. CO.			ZZNB	STD Purchase Order		ADITI SHENDYE
E-Mail: ag00615222@tech	hmahindra.com					23.07.2020 09:51:53 INDIA
Fax:						Mr. FELIX ENGG. CO.
Phone: 123456789						
Event Parameters						rvice and Delivery
Process Type:	QUOT	C	reate Purchase Orde	Cancel		Incoterm:
Currency:	Indian Rupee	L-		-		
Detailed Price Information:	Simple Price					atus and Statistics
Follow-On Document:	Purchase Order or Contract					Created On: 23.07.2020 09:51:53 INDIA
Target Value of RFx in Original Currency:	60,000.00 INR					Created By: Mr. FELIX ENGG. CO.
Target Value of RFx in Selected Currency:	60,000.00 INR					ast Processed On: 23.07.2020 13:36:36 INDIA
Net Value of Header Items:	57,000.00 INR				.:	Last Processed By: ADITI SHENDYE
Terms of Payment:						
						Port Tender No: MBPT/2020/07/2201

PO will be created and replicated to backend system.

System will display message as "PO 4xxxxxxx" is in the process of transfer to back-end system" as shown in screenshot below

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isplay RFx Response:				
int Preview 🗘 Close Technical	RFx Response Export Create Purchase C	order Simulate and Create Purchase Order	Create Contract Publish To (Catalog LOA System Information Create Memory Snapshot
PO 4000010071 is in the process of transf	er to back-end system			
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Fx Response Number 6100000185	RFx Name 10100020 22.07.2020 15:31:01	Status Accepted Supplier Name	FELIX ENGG. CO. Total	Value 57,000.00 INR RFx Number 5100000185
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		:king		
eneral Data Notes and Attachments	Questions Messages			
Bidder Contact Information			RFx Response Information	20 40-00-00 INDIA
Supplier Name: FELIX ENGG. CO			Last Changed On: 23.07.202	
Contact Person Name: FELIX ENGG. CO			Last Changed By: ADITI SH	
E-Mail: ag00615222@tec	hmahindra.com		Creation Date: 23.07.202	
Fax:			Created By: Mr. FELIX	KENGG. CO.
Phone: 123456789				
vent Parameters			Service and	Delivery
Process Type:	QUOT		Ir	ncoterm:
Currency:	Indian Rupee			
Detailed Price Information:	Simple Price		Status and S	Statistics
Follow-On Document:	Purchase Order or Contract]	Crea	ated On: 23.07.2020 09:51:53 INDIA
arget Value of RFx in Original Currency:	60,000.00 INR		Cre	ated By: Mr. FELIX ENGG. CO.
arget Value of RFx in Selected Currency:	60,000.00 INR		Last Proces	ssed On: 23.07.2020 13:36:36 INDIA
Net Value of Header Items:	57,000.00 INR		Last Proces	ssed By: ADITI SHENDYE
Terms of Payment:				
			Port Ter	nder No: MBPT/2020/07/2201

Please see the screenshot below of the PO that has got replicated to backend Hana system. This PO will be available for further processing.

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Create/ Change Purchase Order Select other Purchase order and enter the PO Number "4000010071"

면 Purchase Order Edit Goto Environment System Help	
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Select Invoice tab and select Tax Code "V1" and in header Level Choose appropriate in Customer Data LD Clause and Save the Purchase Order for Approval Process.

<u>P</u> urchase Order <u>E</u>	Edit <u>G</u> oto En <u>v</u> iron	ment S <u>v</u> stem	<u>H</u> elp										
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Click On customer Data and Select LD Clause

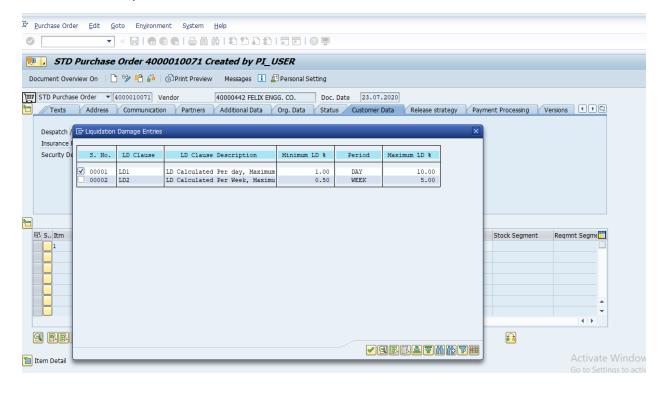
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Insurance Policy No. GeM Purchase Order No. Security Deposit RFX No.	
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Choose from the option for LD Clause and Press "Enter"



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Press "Enter"

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♥	
TI Purchase Order 4000010071 Created by PI_USER	
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Yes No X Cancel	
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Release of Purchase Order

Login as Approver 1 (Assistant Engineer) in SAP System.

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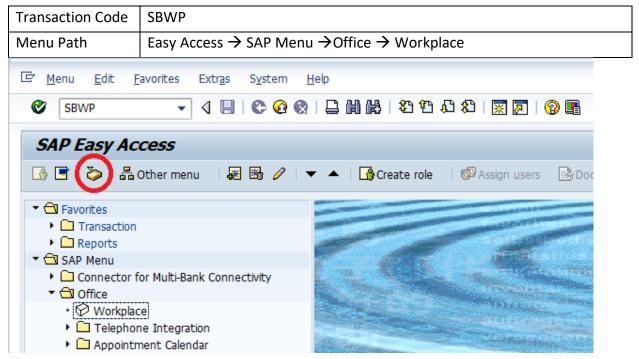
Page 129 of 210





Click on " SAP Business Workspace Button.

Enter Transaction Code SBWP in command bar (or) Follow the below navigation path.



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Expand "Inbox" button, under workflow "Approve Purchase Order 4000010071" message will appear.

🛃 Workplace: MP00611268	00400 0110 6.4.	1.1.1					
So Inbox Gurrents 6	Workflow 28						
 Documents 26 	Ex. TEM	Status	Work Item ID Oreation Da.	Creation P At Co W Dyna	mic colum		
 Workflow 28 	Please approve the Purchase Order 4000010071	6	415625 23.07.2020	12:59:47 5			
 Grouped according to content 	Please approve the Purchase Order 4000010064	0	414818 22.07.2020	11:52:04 5			
 Grouped according to content type 	Please approve the Purchase Regulation 2001000963	0	415320 20.07.2020	02:34:58 5			
 Grouped according to sort key 	Please approve the Purchase Requestion 2001000963	0	414579 20.07.2020	02:33:46 5			
Grouped according to task Overdue entries 0	Q Please approve the Purchase Regulation 2001000962	0	414487 19.07.2020	15:13:42 5			
Deadine Messages 0	Q Please approve the Purchase Regustion 2001000962	0	414486 19.07.2020	15:13:02 5			
Entries with Errors 0	Q Please approve the Purchase Regulation 2001000961	0	415262 19.07.2020	15:10:39 5			
Outbox	Please approve the Purchase Requisition 2001000961	C	415261 19.07.2020	15:10:16 5			
Restmand	Please approve the Purchase Regulation 2001000959	Ø	415260 19.07.2020	15:10:03 5			
+ CF Private folders	Please approve the Purchase Regustion 2001000959	0	414485 19.07.2020	15:07:07 5			
• Shared folders	Q Please approve the Purchase Regulation 2001000959	0	414484 19.07.2020	15:06:38 5			
Subscribed Folders	Q Please approve the Purchase Regulation 2001008959	Ø	415258 19.07.2020	15:05:51 5			
• 📅 Trash	Please approve the Purchase Regulation 2001000959	Ø	415259 19.07.2020	15:05:51 5			
• 📅 Shared trash	4.3						
	2 -	lips & to	ricks: Group work its	ms according to content	type		
	Please approve the Purchase Order 4000010071						
	Description		Objects and attachments				
	Select one of the available decision options. completes the processing of this step.	This	No attachments or obj	ects exist			
	Sefore you make a decision, you can display th	-					

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Alternative Thinking





Double Click on the "**Please Approve Purchase Order 4000010071**" message. It will open the Purchase requisition document in Display mode.

Click on " 🧟 " **Back** Button. System will open Decision step in workflow screen.

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Please approve the Purchase Order 4000010071	
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Select one of the available decision options. This completes the processing of this step.	No attachments or objects exist
Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.	
If you choose Cancel, the user decision remains in your inbox for processing.	

Click on "Approve" Button to approve the Purchase Order.

Purchase Order will be approved with level 1.

Purchase Order Approval Request notification is forwarded to Approver 2

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User	EE001
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Logon Language	EN

Login as Approver 2 (Executive Engineer) in SAP System.

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Click on " SAP Business Workspace Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP		
Menu Path	Easy Access → SAP Menu	$J \rightarrow Office \rightarrow Workplace$	
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Expand "Inbox" button, under workflow "Approve Purchase Order 4000010071" message will appear.

Double Click on the "**Please Approve Purchase Order 4000010071**" message. System will open the Purchase Order document in Display mode.

Workplace: MP00611268				
Documents 6	Workflow 28			
 Documents 26 Workflow 28 	Ex TER	Status	Work Item ID Oreation Da	Creation P At Co W Dynamics
	Q Please approve the Purchase Order 4000010071	0	415625 23.07.2020	12:59:47 5
 Grouped according to content 	Please approve the Purchase Order 4000010064	Q.	414818 22.07.2020	11:52:04 5
 Grouped according to content type 	Please approve the Purchase Regulation 2001000963	0	415320 20.07.2020	02:34:58 5
 Grouped according to sort key 	Q Please approve the Purchase Regulation 2001000963	0	414579 20.07.2020	02:33:46 5
Grouped according to task Overdue entries 0	Q Please approve the Purchase Regulation 2001000962	9	414487 19.07.2020	15:13:42 5
Deadline Messages 0	Q Please approve the Purchase Regustion 2001000962	0	414486 19.07.2020	15:13:02 5
Description Messages 0 Description Messages 0	Q Please approve the Purchase Regulation 2001000961	0	415262 19.07.2020	15:10:39 5
Outbox	Please approve the Purchase Requestion 2001000961	C	415261 19.07.2020	15:10:16 5
Readmant	Please approve the Purchase Regulation 2001000959	Ø.	415260 19.07.2020	15:10:03 5
Private folders	Please approve the Purchase Regulation 2001000959	0	414485 19.07.2020	15:07:07 5
Shared folders	Q Please approve the Purchase Regustion 2001000959	0	414484 19.07.2020	15:06:38 5
Subscribed Folders	Q Please approve the Purchase Requisition 2001000959	e	415258 19.07.2020	15:05:51 5
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	2	Tips & to	ricks: Group work its	ms according to content type
	Please approve the Purchase Order 400	0010071		
	Description	1	Objects and attachmen	te
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	Sefore you make a decision, you can display	****		

Click on " 🧟 " **Back** Button. System will open Decision step in workflow screen.

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Click on "Approve" Button to approve the Purchase Order

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Before you make a decision, you can display the attachments and objects which	
have been attached to the user decision. You can also add your own attachments.	
have been attached to the user decision. You can also add your own attachments.	
have been attached to the user decision. You can also add your own attachments.	

Purchase Order will be approved with level 2.

Purchase Order Approval Request notification is forwarded to Approver 3.

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Login as Approver 3 (Dy CME) in SAP System.

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SAP	
New password	
Client	500
User Password	DYCME001
Logon Language	EN

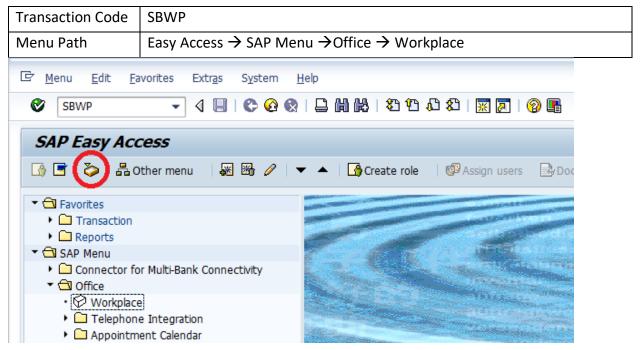
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Click on " SAP Business Workspace Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.



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Expand "Inbox" button, under workflow "Approve Purchase Order 4000010071" message will appear.

Double Click on the "Please Approve Purchase Order 4000010071" message. System will open the Purchase Order document in Display mode.

🛃 Workplace: MP00611268	00411 TAS 6.4.4	-			
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 Documents 26 	Ex. TEM	Status	Work Item ID Oreation Da.	Owation P At Co W	Dynamic colu
 Workflow 26 	Please approve the Purchase Order 4000010071	3	415625 23.07.2020	12:59:47 5	
 Grouped according to content 	Please approve the Purchase Order 4000010064	0	414818 22.07.2020	11:52:04 5	
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 Grouped according to sort key 	Q Please approve the Purchase Requestion 2001000963	0	414579 20.07.2020	02:33:46 5	
Grouped according to task Deventue entries 0	Please approve the Purchase Regulation 2001000962	0	414487 19.07.2020	15:13:42 5	
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Deadline Messages 0 Entries with Enors 0	Q Please approve the Purchase Regulation 2001000961	0	415262 19.07.2020	15:10:39 5	
Outbox	Please approve the Purchase Regulation 2001000961	C	415261 19.07.2020	15:10:16 5	
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Private folders	Please approve the Purchase Regustion 2001000959	0	414485 19.07.2020	15:07:07 5	
Shared folders	Q Please approve the Purchase Regustion 2001000959	Ø	414484 19.07.2020	15:06:38 5	
Subscribed Folders	Please approve the Purchase Regulation 2001000959	ê	415258 19.07.2020	15:05:51 5	
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	Please approve the Purchase Order 400	00010071			
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	Select one of the available decision options completes the processing of this step.	s. This	No attachments or obj	ects exist	
	Sefore you make a decision, you can display	*he			

Click on " 🧖 " Back Button. System will open Decision step in workflow screen.

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Select one of the available decision options. This completes the processing of this step. Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.	-

Click on "**Approve**" Button to approve the Purchase Order.

Purchase Order will be approved with level 3.

Purchase Order Approval Request notification is forwarded to Approver 4.

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Login as Approver 4 (CME) in SAP System.

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SAP	
New password	
Client	500
User	CME001
Password	****
Logon Language	EN

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Click on " SAP Business Workspace Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access \rightarrow SAP Menu \rightarrow Office \rightarrow Workplace
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Expand "Inbox" button, under workflow "Approve Purchase Order 4000010071" message will appear.

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 Grouped according to content type 	Please approve the Purchase Regulation 2001000963	0	415320 20.07.2020	02:34:58 5		
 Grouped according to sort key 	Please approve the Purchase Regulation 2001000963	0	414579 20.07.2020	02:33:46 5	6	
Grouped according to task Doverdue entries 0	Please approve the Purchase Regulation 2001000962	0	414487 19.07.2020	15:13:42 5	0	
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Outbox	Please approve the Purchase Requisition 2001000961	C	415261 19.07.2020	15:10:16 5	6	
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+ 👌 Private folders	Please approve the Purchase Regustion 2001000999	0	414485 19.07.2020	15:07:07 5		
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 Subscribed Folders 	Please approve the Purchase Regulation 2001000959	e	415258 19.07.2020	15:05:51 5	0	
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	Before you make a decision, you can display t	he				

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Double Click on the "**Please Approve Purchase Order 4000010071**" message. System will open the Purchase Order document in Display mode.

Click on " 🧟 " **Back** Button. System will open Decision step in workflow screen.

Click on "**Approve**" Button to approve the Purchase Order.

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Please approve the Purchase Order 4000010071	
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Description	Objects and attachments
Select one of the available decision options. This completes the processing of this step.	No attachments or objects exist
Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.	
If you choose Cancel, the user decision remains in your inbox for processing.	

Purchase Order will be approved with level 4.

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Once the Purchase Order is approved by all 4 level approvers, a notification is triggered to Purchase Order Initiator and all preceding approvers.

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 Workflow 27 	Purchase Order 400001007		23.07.2020	1
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 Grouped according to sort key 	Purchase Order 400001007	71 is SAP_WFRT	23.07.2020	1
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Outbox	Purchase Order 400001006		22.07.2020	1
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	Purchase Order 4000010071	is approved.		
	Hello Sir/Madam,			
	Purchase Order 4000010071 is ap	proved.		
	Approved by: MP00611268 MP00	611268		
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				Go to Settings to activate

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Display of Purchase Order

Enter T code ME23N and Enter the other Purchase order No 4000010071 and select Release Strategy System shows that purchase order released all four levels.

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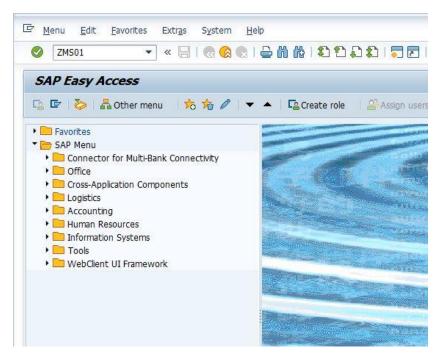
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Create/ Change Measurement Sheet

Enter Transaction code ZMS01 in command Bar



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In Create Measurement Sheet Screen, provide below details;

Service Order: 4000010071

Company Code: 1000

System will display Service line item details from service purchase order.

reate Measurement Sh	leet								
Clear Screen ▶									
	mpany Code 1000			Plant Purcha	ise Group		Doc. Date		
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	Quantity	U	Ser	vices for Item	Description	Text		BOQ Qty	BOQ Amour
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Service Order - Line Items Material/Service	Quantity	-		1	Description		Input Measurements Input Measurements Input Measurements Input Measurements Input Measurements Input Measurements Input Measurements	BOQ Qty	BOQ Amoun

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Click on "	Input Measurements	" Input measurement Button. System will open Backup sheet
screen		

Creat	e Measurement Sheet								
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Service	Order 4000010071 Company Cod	de 1000	Mumbai Por	t Trust	Plant	1000 Mumbai Port Trust	Doc. Date	23.07.2020	
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By Clicking input Measurement the below input screen will appear

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UoM Square meter	BREATH	LENGTH		Description	Date	B		ame	File na
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Enter the measurement details

Mumbai Port Trust FELIX ENGG. CO. OBJECT II UoM Square meter Remarks Finshed	Plant Purchase Group D GUI ID	1000 Mumbal Port In p 101 Material Mont	DATE	Doc. Date 23.]
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In Back up screen, record the service activity details.

Click on " Save & Exit " Button.

System will Update the data recorded against the service line item. Current JMS Quantity will be updated in Measurement sheet.

Click on " 📙 " icon

System will Create Measurement sheet & displays " JMS: 1100000012 Successfully created. :" Message.

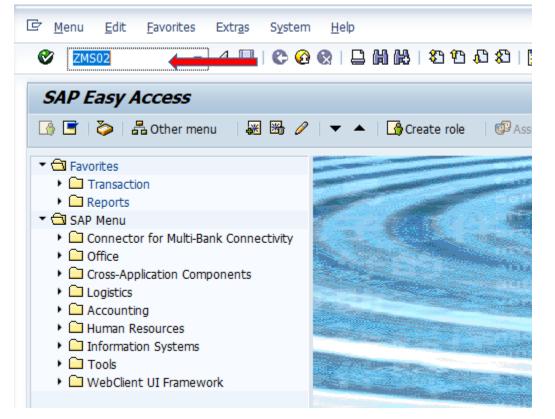






Change Measurement Sheet:

Enter Transaction Code ZMS02 in the Command Bar.



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Enter following data. Company Code: 1000 JMS No:1100000012.

And Press "Enter"

Click on " 🎤 " Workflow will be initiated

Change Me	asurement Sheet														
🎸 Clear Screen	D 🦻 🍋														
Service Order JMS No. Attachments	4000010071 Company Coo 1100000012 Vendor	de 1000 40000442	Mumbai Po FELIX ENG			Plan Puro	it chase Grou		Mumbai F Material N	ort Trust Igmt			Doc. [Date 23.	07.20
Doc. Type File name					DBJECT ID	GUI ID					DATE	-	ТҮРЕ	* * *	
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	service at/Survey Maint by Exte		A. 🔷	10		000085		wo Coats	- Oil B	ound Dist			Input Meas		_
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Workflow Relea	sed for Approval						SA	2						Þ	мроое

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Approve JMS Sheet

Login as Approver 1 (Assistant Engineer) in SAP System.

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SAP	
New password	
Client	500
User	AE001
Password	*****
Logon Language	EN

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Click on " SAP Business Workspace Button.

Enter Transaction Code SBWP in command bar (or) Follow the below navigation path.

Transaction Code	SBWP							
Menu PathEasy Access \rightarrow SAP Menu \rightarrow Office \rightarrow Workplace								
🔄 Menu Edit Fa	vorites Extras System	Help						
SBWP								
SAP Easy Acc	cess							
	ther menu 🛛 🕷 🔀 🧷 🛛	🔻 🔺 🕞 Create role 🞯 Assign users 🛛 🗟 Doc						
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Workplace Telephone								







Expand "Inbox" button, under workflow "Please Approve JMS 1100000012 "message will appear

Workplace: MP00611268	20420 0112 6.4.4.6	MALIA .				
Dos Orread Documents 9	Workflow 29					
 Documents 31 	Ex Title	Status	Work Item ID Creation Da	Creation	P At Co W	Dynamic o
 Workflow 29 	Please approve the JMS 1100009012	0				
 D Overdue entries 0 	Please approve the Purchase Order 4000010071	Ø.	415659 23.07.2020	13:04:49	5	
Deadline Messages 0	Qu Please approve the Purchase Order 4000010064	Ø	414518 22.07.2020	11:52:04	5	
Entries with Errors 0	Q Please approve the Purchase Requisition 2001000963	0	415320 20.07.2020	02:34:58	5	
Outbox	Please approve the Purchase Requisition 2001000963	0	414579 20.07,2020	02:33:46	5	
Resubmission Arrow Foldern	Q Please approve the Purchase Requisition 2001000952	0	414487 19.07.2020	15:13:42	5	
Shaved folders	Q. Please approve the Purchase Regulation 2001000962	Ø	414486 19.07.2020	15:13:02	5	
Subscribed Folders	Please approve the Purchase Requisition 2001000961	Ø	415262 19.07.2020	15:10:39	5	
G Subscribed Folders Trash Tash Tash	Q Please approve the Purchase Regulation 2001000961	Ø.	415261 19.07.2020	15:10:16	5	
	Please approve the Purchase Requisition 2001000939	Ø	415260 19.07.2020	15:10:03	5	
	Please approve the Purchase Requisition 2001000959	Ø	414485 19.07.2020	15:07:07	5	
	Please approve the Purchase Requisition 2001000959	0	414484 19.07.2020	15:06:38	5	
	Please approve the Purchase Regulation 2001000959	0	415258 19.07.2020	15:05:51	5	
	4.9					
			P Tips 6	tricks:	Resubmit	Work Ite
	Please approve the JMS 1100000012					
	Description		bjects and attachmen	ta c		
	Select one of the svailable decision option completes the processing of this step.	s. This	No attachments or obj	ects exi	25	
	Before you make a decision, you can display	-				

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System will open the JMS document for line item wise approval.

Select the line item & Click on " Post " button.

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₽.		t line	Leve	1 Lev	vel2 L	.evel3	Level4	JMS Nur 110000			ny Code	Service 400001		Item No 1		Vendor name FELIX ENGG.	Doc.Date 23.07.2020	Service/Mate Cal/Stat/Sur

Click on " \checkmark " icon to confirm the selected line items.









Click on "Approve" Button to approve the Measurement Sheet.

년 Decision Edit Goto System Help									
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Please approve the JMS 1100000012									
Choose one of the following alternatives									
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Reject									
Display									
Approval or Rejection History									
Hold									
Description	Objects and attachments								
Select one of the available decision options. This completes the processing of this step.	No attachments or objects exist								
Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.									
If you choose Cancel, the user decision remains in your inbox for processing.									

Measurement Sheet will be approved with level 1.

Measurement Sheet Approval Request notification is forwarded to Approver 2.

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Login as Approver 2 (Executive Engineer) in SAP System.

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SAP	
New password	
Client	500
User	EE001
Password	****
Logon Language	EN

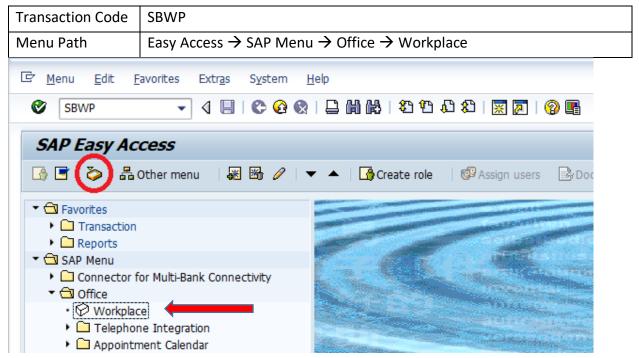
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Click on " SAP Business Workspace Button.

Enter Transaction Code SBWP in command bar (or) Follow the below navigation path.



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Expand "Inbox" button, under workflow "Please Approve JMS 1100000012 "message will appear

Workplace: MP00611268	· · · · · · · · · · · · · · · · · · ·	Malia I				
Dos Ocumenta 9	Workflow 29					
 E Documents 31 	Ex Title	Status	Work Item ID Creation Da	Creation P	At Co W	Dynamic
 Workflow 29 	Please approve the JMS 1100009012	0	414966 23.07.2020	13:08:31 5	-	
 Dverdue entries 0 	Q Please approve the Purchase Order 4000010071	Ø.	415659 23.07.2020	13:04:49 5		
Deadline Messages 0	Please approve the Purchase Order 4000010064	Ø	414618 22.07.2020	11:52:04 5		
Entries with Errors 0	Please approve the Purchase Requisition 2001000963	0	415320 20.07.2020	02:34:58 5		
• Outbox	Please approve the Purchase Requisition 2001000963	0	414579 20.07.2020	02:33:46 5		
 GResubmesion GResubmesion 	Q Please approve the Purchase Requisition 2001000962	0	414487 19.07.2020	15:13:42 5		
GP Private robers GP Shared folders	Q Please approve the Purchase Regulation 2001000962	Ø	414486 19.07.2020	15:13:02 5		
G Subscribed Folders	Please approve the Purchase Requisition 2001000961	Ø	415262 19.07.2020	15:10:39 5		
• Trah	Q Please approve the Purchase Requisition 2001000961	Ø.	415261 19.07.2020	15:10:16 5		
Shared trash	Please approve the Purchase Requisition 2001000939	0	415260 19.07.2020	15:10:03 5		
	Please approve the Purchase Requisition 2001000959	Ø	414485 19.07.2020	15:07:07 5		
	Please approve the Purchase Requisition 2001000959	0	414484 19.07,2020	15:06:38 5		
	Please approve the Purchase Requisition 2001000959	Ø	415258 19.07.2020	15:05:51 5		
	4. P					
			P Tips 6	tricks: 9	iesubmit W	ork Ite
	Please approve the JMS 1100000012					
	Description		bjects and attachmen	ta		
	Select one of the svailable decision option completes the processing of this step.	s. This	No attachments or obj	ects exist		
	Before you make a decision, you can display					

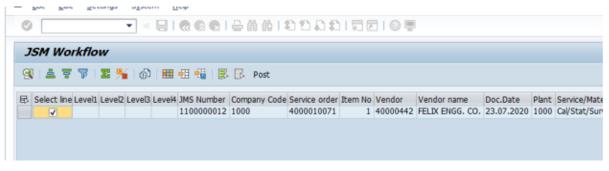
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System will open the JMS document for line item wise approval.

Select the line item & Click on " Post " button.



Click on " 🗹" icon to confirm the selected line items.







Click on "Approve" Button to approve the Measurement Sheet.

년 Decision Edit Goto System Help	
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Decision Step in Workflow	
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Please approve the JMS 1100000012	
Choose one of the following alternatives	
Approve	
Reject	
Display	
Approval or Rejection History	
Hold	
Description	Objects and attachments
Select one of the available decision options. This completes the processing of this step.	No attachments or objects exist
Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.	
If you choose Cancel, the user decision remains in your inbox for processing.	

Measurement Sheet will be approved with level 2.

Measurement Sheet Approval Request notification is forwarded to Approver 3.

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Login as Approver 3 (Dy CME) in SAP System.

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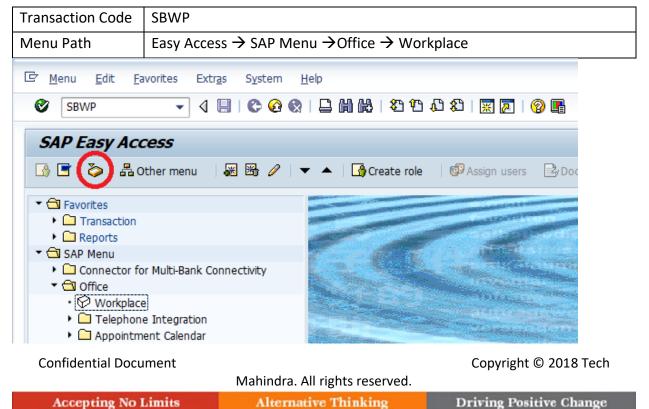






Click on " SAP Business Workspace Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.







Expand "Inbox" button, under workflow "Please Approve JMS 1100000012 "message will appear

🕺 Workplace: MP00611268	00480 8110.4.4.6				
Dos Documents 9	Workflow 29				
 E Documents 31 	Ex TIDe	Status	Work Item ID Creation Da	Creation P At Co	W Dynamic
 Workflow 29 	Please approve the JMS 1100009012	0	414966 23.07.2020	13:08:31 5	
 Dverdue entries 0 	Please approve the Purchase Order 4000010071	Ø.	415659 23.07.2020	13:04:49 5	
 Deadline Messages 0 	Please approve the Purchase Order 4000010064	Ø	414818 22.07.2020	11:52:04 5	
Entries with Errors 0	Please approve the Purchase Requisition 2001000963	0	415320 20.07.2020	02:34:58 5	
Cutbox GResubmeston	Please approve the Purchase Requisition 2001000963	0	414579 20.07,2020	02:33:46 5	
GP Resubmission	Please approve the Purchase Requisition 2001000962	0	414487 19.07.2020	15:13:42 5	
Generation robers Generation robers	Q Please approve the Purchase Requisition 2001000962	Ø	414486 19.07.2020	15:13:02 5	
Gi Subscribed Folders	Please approve the Purchase Requisition 2001000961	Ø	415262 19.07.2020	15:10:39 5	
• Trah	Q Please approve the Purchase Requisition 2001000961	Ø.	415261 19.07.2020	15:10:16 5	
Shared trash	Please approve the Purchase Requisition 2001000939	Ø	415260 19.07.2020	15:10:03 5	
	Please approve the Purchase Regulation 2001000959	Ø	414485 19.07.2020	15:07:07 5	
	Please approve the Purchase Requisition 2001000959	0	414484 19.07,2020	15:06:38 5	
	Please approve the Purchase Requisition 2001000959	Ø	415258 19.07.2020	15:05:51 5	
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			P Tips 6	tricks: Resubmit	Work Ite
	Please approve the JMS 1100000012				
	Description	0	bjects and attachmen	ta	
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	Before you make a decision, you can display	the			

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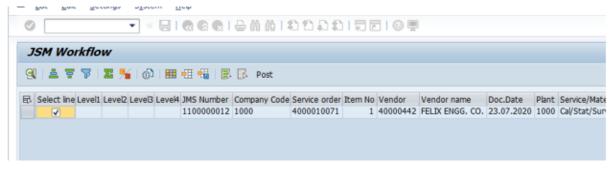
Page 167 of 210





System will open the JMS document for line item wise approval.

Select the line item & Click on " Post " button.



Click on " \checkmark " icon to confirm the selected line items.

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Click on "Approve" Button to approve the Measurement Sheet.

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Decision Step in Workflow	
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Please approve the JMS 1100000012	
Choose one of the following alternatives	
Approve	
Reject	
Display	
Approval or Rejection History	
Hold	
Description	Objects and attachments
Select one of the available decision options. This completes the processing of this step.	No attachments or objects exist
Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.	
If you choose Cancel, the user decision remains in your inbox for processing.	

Measurement Sheet will be approved with level 3.

Measurement Sheet Approval Request notification is forwarded to Approver 4.

Login as Approver 4 (CME) in SAP System.

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New password	
Client	500
User	CME001
Password	****
Logon Language	EN

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Click on " SAP Business Workspace Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access \rightarrow SAP Menu \rightarrow Office \rightarrow Workplace
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SBWP	- 〈 📙 ② ③ 😫 🎁 🎼 塾 哲 む 第 🛒 🖉 🖷
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Expand "Inbox" button, under workflow "Please Approve JMS 1100000012 "message will appear

Workplace: MP00611268	00400 TIL 00.4.4.					
Dos Orread Documents 9	Workflow 29					
 	Ex Title	Status	Work Item ID Creation Da	Creation	P At Co W	Dynamic c
 Workflow 29 	Please approve the JMS 1100000012	0	414966 23.07.2020	13:08:31	5	
 Dverdue entries 0 	Q Please approve the Purchase Order 4000010071	Ø	415659 23.07.2020	13:04:49	5	
Deadline Messages 0	Q Please approve the Purchase Order 4000010064	Ø	414618 22.07.2020	11:52:04	5	
Entries with Errors 0	Q Please approve the Purchase Regulation 2001000963	0	415320 20.07.2020	02:34:58	5	
• 😓 Outbox	Q Please approve the Purchase Regulation 2001000963	0	414579 20.07.2020	02:33:46	5	
GP Resubmission	Please approve the Purchase Repuiston 2001000962	0	414487 19.07.2020	15:13:42	5	
G Private folders Shared folders	Q. Please approve the Purchase Reputtion 2001000962	Ø	414486 19.07.2020	15:13:02	5	
GS Snared Toders GS Subscribed Folders	Q. Please approve the Purchase Requisition 2001000961	Ø	415262 19.07.2020	15:10:39	5	
Subscreep Folders Traih	Q Please approve the Purchase Regulation 2001000961	Ø.	415261 19.07.2020	15:10:16	5	
Shared trash	Please approve the Purchase Regulation 2001000959	Ø	415260 19.07.2020	15:10:03	5	
	Please approve the Purchase Regulation 2001000959	Ø	414485 19.07.2020	15:07:07	5	
	Q Please approve the Purchase Regulation 2001000959	0	414484 19.07.2020	15:06:38	5	
	Please approve the Purchase Requisition 2001000959	63	415258 19.07.2020	15:05:51	5	
	4.1	1.5				
			👂 Tips i	tricks	Resubmit a	Work Item
	Please approve the JMS 1100000012					
	Description		bjects and attachmen	ta		
	Select one of the available decision options completes the processing of this step.	. This	No attachments or obj	ects exi		
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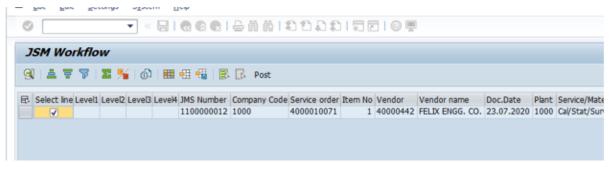
Alternative Thinking





System will open the JMS document for line item wise approval.

Select the line item & Click on " Post " button.



Click on " \checkmark " icon to confirm the selected line items.

🔄 In	formation	×
i	Selected entries will be considered for approval process	
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Click on "Approve" Button to approve the Measurement Sheet.

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Decision Step in Workflow	
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Please approve the JMS 1100000012	
Choose one of the following alternatives	
Approve	
Reject	
Display	
Approval or Rejection History	
Hold	
Description	Objects and attachments
Select one of the available decision options. This completes the processing of this step.	No attachments or objects exist
Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.	
If you choose Cancel, the user decision remains in your inbox for processing.	

JMS will be approved with level 4.

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Once the JMS is approved by all 4 level approvers, a notification is triggered to initiator stating "JMS 110000012 is approved"

Workplace Edit Goto Folder Environment Settings Syste				
✓ <				
Business Workplace of MP00611268				
🌄 New message 🛛 🛗 Find folder 🛛 🛗 Find document 🕫 Appointment	t calendar 🛛 🔯 Distribution lists			
 <i>R</i> Workplace: MP00611268 	ð 🗅 . 🐨 . 🗉 🔝 . 🗃 .	«// <u>#</u> 0		
• 🧽 Inbox	Unread Documents 14			
Unread Documents 14 Documents 36		Les Le se		
Vorkflow 28	Me Ty Title	At Author SAP_WFRT	Date recei. Co Re 23.07.2020	Recip
Grouped according to content	MS 1100000012 is approved.		23.07.2020	1
Grouped according to content type	MS 1100000012 is approved.		23.07.2020	1
 Grouped according to sort key 	MS 1100000012 is approved.		23.07.2020	1
Grouped according to task	MS 1100000012 is approved.		23.07.2020	1
Overdue entries 0	Purchase Order 4000010071 i		23.07.2020	- 1
Deadline Messages 0 Dentries with Errors 0	Purchase Order 4000010071 i		23.07.2020	1
Control Contro Control Control Control Control Control Control Control Control Co	Purchase Order 4000010071 i		23.07.2020	1
Colloba C	Purchase Order 4000010071 i		23.07.2020	1
Contraction	IMS 110000010 is approved.		22.07.2020	1
Shared folders	🛛 🔀 Purchase Order 4000010064 i	s SAP_WFRT	22.07.2020	1
Ø Subscribed Folders	🖂 🗟 Purchase Order 4000010064 i	s SAP_WFRT	22.07.2020	1
• 📅 Trash	🖂 🔀 Purchase Order 4000010064 i		22.07.2020	1
 The state of the s	🖂 🗟 Purchase Order 4000010064 i	s SAP_WFRT	22.07.2020	1
	JMS 1100000012 is approved.			
	Hello Sir/Madam,			

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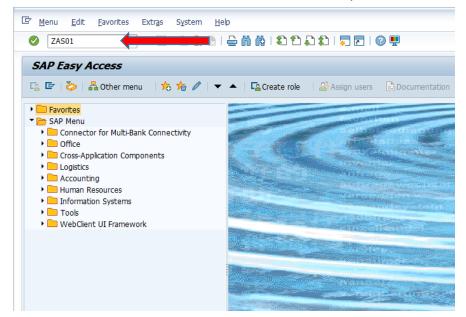
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Create/ Change Abstract:

Enter Transaction code ZAS01 in Command bar and press Enter



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In Create Abstract Screen, provide below details, Company Code: 1000 Service PO: 4000010071

			12272	U T		
eate Abstract						
lear Screen						
Service Order		mpany Code 1000			Doc. Date	
	Pla				Purchase Group	
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of Approved and ope	an IMS					
Select JMS No	Created On	Created By	Changed On	Changed By	Approved 🛄	
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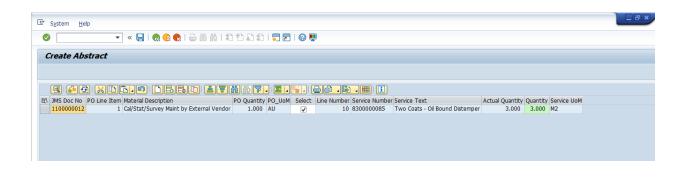


System <u>H</u> elp			
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reate Abstract			
Clear Screen			
Service Order [4000010071] Company Code 1000 Mumbal Po Plant 1000 Vendor 40000442 FELIX ENG		Doc. Date 23.07.2020 Purchase Group 101	
st of Approved and open JMS			
Select JMS No Created On Created By 1100000012 23.07.2020 MP00611268	Changed On Changed By	Approved 1	
		•	
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Press Enter.

System will fetch the details of JMS recorded against Service order and display in Create Abstract screen.

select the JMS Line Item and Click on " ቤ	Process Selection	" Process Selection Button.
---	-------------------	-----------------------------



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System will Generate the Abstract Document.

Create Abstr	ract				
11	6.• DBBC 170	(* ? .) 2 .	<u>%</u> ₽@		
JMS Doc No PO Line Iter 1100000012	m Material Description PO 1 Cal/Stat/Survey Maint by External Vendor	Quantity PO_UoM 1.000 AU	Select Line	Number Service Number 10 830000085	Service Two C
(E Details of Abstract created				

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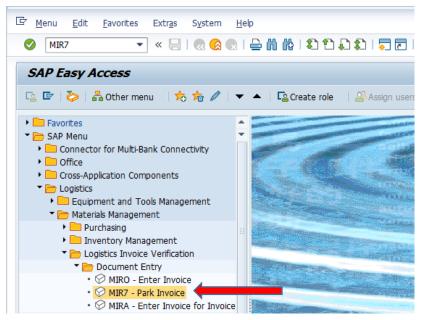
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Invoice Verification:

Enter Transaction code MIR7 in command Bar

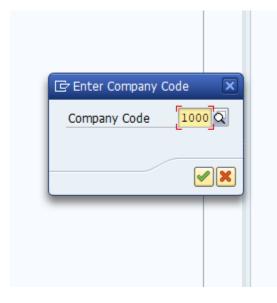


Enter Company Code: 1000 and click " 🗹 " Continue icon.

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In Park Incoming Invoice Screen, provide below details;

Invoice Date: 23.07.2020

Purchase order: 4000010071 & Press Enter.

	☐ Invoice Document Edit	<u>G</u> oto System <u>H</u> elp	
Show PO structure Hide worklist Transaction Transactio	 • 	« 🗐 🗞 🗞 🖬 🚔 🖞 👘 📫 🎝 🖨 🗊 🗖 🚱 💻	
Worklast Transaction Invoice Parked documents Parked documents Basic Data Payment Detais Tax Withholding tax Invoice date 23.07.2020 Reference Posting Date 23.07.2020 Reference Solution Posting Date Company Code 1000 Mumbal Port Trust Mumbai Fosting Date Goods/service items Bosto Date Bosto Date Posting Date Solution Date Bosto Date Solution Date Bosto Date Bosto Date	Park Incoming Invo	pice: Company Code 1000	
Held documents Parked documents Basic Data Payment Details Tax Withholding tax Posting Date 23.07.2020 Reference Posting Date 23.07.2020 Amount Calculate Tax Tax Amount Bus.Place/Sectin // Text Company Code 1000 Mumbal Port Trust Mumbai PO Reference G/L Account Material Purchase Order/Scheduling Agreement 4000010012 Goods/service items	Show PO structure 🔮 Hid	e worklist 📫 Hold 🗱 Simulate 🗧 Save as Completed Messages 🚺 Help 🕬 NF	
Purchase Order/Scheduling Agreement [4000010071]Q Coods/service items	Held documents Parked documents	Basic Data Payment Detais Tax Withholding tax (()) Invoice date 23072020 Reference Posting Date 23.07.2020 Amount Calculate Tax Tax Amount Calculate Tax Tax Amount Text Calculate Tax Tax Amount Text Calculate Tax Tax Amount Text Calculate Tax Tax Amount Calculate Tax Tax Amount Text Calculate Tax Tax Amount Tax Amount Text Calculate Tax Tax Amount Text Calculate Tax Tax Amount Tax Amount Text Calculate Tax Tax Amount Tex Tax Tax Amount Tex Tax Tax Amount Tex Tax Tax Amount Tex	
Item Amount Quantity O Purchase Item PO Text Central C Item Entern Po Text O / 0 Item Entern Po Text Central C Item Entern Po Text Central C Item Entern Po Text Item Po Text Item Entern Po Text Central C Item Entern Po Text Item Po Text Item Entern Po Text Item Po Text Item Po Text		Purchase Order/Scheduling Agreement [4000010071] [2]	







System will copy details with reference to PO & Display. Select the Tax Code V1 & Select Calculate Tax Checkbox. Provide Base line date: 23.07.2020 in Payment Tab

ark Incomina Inv	pice: Company Code 1000		
	ie worklist 💼 Hold 🎬 Simulate 🔚 Save as Completed 💓 Messages 🚺 Help 🐠 NF		
rklist	Transaction Invoice		
Held documents			
Parked documents Docs complete for pos	Basic Data Payment Details Tax Withholding tax () () C Vendor 0040000442		
Docs complete for pos	FELIX ENGG. CO.		
	Invoice date 23.07.2020 Reference 3 MOTISHAH CROSS LANE		
	Posting Date 23.07.2020 COZY COTTAGE, 4TH FLOOR, BYCULLA		
	Amount INR 400027 MUMBAI-MUMBAI		
	🗸 Calculate Tax		
	Tax Amount 2,850.00 V1 (CGST+SGST 5% In 🔻		
	Bus.Place/Sectn / Bank Key SBIN0000290		
	Text Bank acct 7234896734		
	Paymt terms Due immediately STATE BANK OF INDIA, WORLI NORTH	III OI	
	PO Reference G/L Account Material		
	Purchase Order/Scheduling Agreement 4000010071 Goods/service items	-	
	Layout All information	-	
		Central Co	
	1 Cal/Stat/Survey Maint by External Vendor		
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		Items	A stimula N
			Activate \

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Click on **"Calculate Tax Check Box"**, Tax Amount will be calculated as per selected Tax Code and displayed.

Provide Amount including Tax Amount. Amount: 500.

Click on " Simulate Withon.

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로 Invoice Document Edit Goto System Help	
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Park Incoming Invoice: Company Code 1000	
Show PO structure 🕑 Messages 🗓 H	lelp 🕐 NF
Worklist Transaction Invoice Held documents	COB Balance 0.00 INR
Parked documents Basic Data Payment Details Tax Withholding tax () ()	
Invoice date 23.07.2020 Reference Posting Date 23.07.2020 Amount 59,850.00 INR ✓ Calculate Tax Tax Amount 2,850.00 Bus.Place/Sectn / Text Paymt terms Due immediately ▼	
Purchase Order/Scheduling Agreement 4000010071	Goods/service items
타 Item Amount Quantity O 🔜 Purchase Item F	
[1] 57,000.00 [1] 4000010071 1 C	Cal/Stat/Survey Maint by External Vendor
	4 >
ERD ET Item Earch Term	1 / 1 Items
	Go to

System will display FI Documents posting details.

Click on " Save as Completed " Save as Complete Button.

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			Hold 🗱 Simulate 🖡	Save	as Complete	d]	Mes	sages 🚺 Help	00 NF					
🖻 Simulate	Document in I	NR (Document currency)		_						_	×	0.00 INR		
Position	A G/L	Act/Mat/Ast/Vndr	Amount		Purchasing	Item		Jurisd. Code	Tax date	Bu	Co			
	J	FELIX ENGG. CO. / 40					**				-	R	3	
	25 18160008	GR/IR Clearing			4000010071		٧1						2	
	3 S 23500000	CGST- Input Credit	1,425.00				V1							
		SGST- Input Credit	1,425.00	INR			٧1					YCULLA		
120000000	OS 18150019	TDS Payable - Sec 19	855.00-	INR										
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	850.00	Credit 59,850.	00 Bal.	0.00										ACTIVALE VVIIIUOVVS

System will park the invoice and displays " Invoice document 6010000020 has been saved as complete " message

FI Process 1 - Vendor Outgoing Payment: Transaction Code F-53

Step 1. In the below selection screen enter the following fields to process the payment for the Vendor

Enter Document Date: 27-07-2020
 Bank Account Details (Rev Outgoing A/c): 23110002
 Vendor Account Number.: 40000442
 Document Date or Entry Date

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Process Open Items							
Document Date	27.07.2020	Туре	KZ	Company Code	1000		
Posting Date	27.07.2020	Period	4	Currency/Rate	INR		
Document Number				Translation dte		Outroing Doub	A
Reference				Cross-CC Number		Outgoing Bank	
Doc.Header Text	Calibration Maint			Trading part.BA		details	
Clearing Text	Calibration Maint						
Bank data							
Account	23110002			Business Area			
Amount	1				(-
Amt.in loc.cur.						Vendor Accour	nt Numbe
Bank Charges				LC Bank Charges			
Value date	27.07.2020			Profit Center			
Text	Calibration Maint			angnment			
					-		
Open item selection				Additional selections			
Account	40000442			ONone			
Account Type	K	Other Accou	unts	Amount			
Special G/L Ind		Standard O	Is	Ocument Number	r	Г ,	
Payt Advice No.				Posting Date		L	
Distribute by Age				ODunning Area			
				_			

Step 2. Enter the Document Number and Click on Process Open Items to process the payment

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Other selection Other	er account Pro	cess Open Items			
Parameters entered					
Company Code	1000				
Account	40000	442			
Account Type	K				
Special G/L Ind.			Standard C	Is	
Document Number					
From		то		String	Initial Valu
260000034					

Step 3. Enter the Payment Amount to Post the Payment for the Invoice document

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SAP User Manual for Calibration/Statutory/Survey Maintenance

🔉 📝 Distribu	te D	ifference Cha	rge	Off Diff	erence	Sediting Options Sector C	ash Disc. Due			
Standard	P	artial Pmt	Res.	Items	W	H Tax				
Account items	s 40	000442 FELIX E	NGG	6. CO.						
		Document D	-	Busi		INR Gross		CashDiscount	:	CDPer.
60000034	RE	23.07.2020	31		4		58,995.00-	L		
	R	1 7 M	K	Amou	int 🔠	🖥 Gross<>Net 👪 Curre	ncy 🧪 Items	🧪 Items	Disc. 🗪 Disc.	
Processing Sta	tus									
Number of Ite	ems	1					Amount Entered			1.00-
Display from I	tem	1					Assigned			58,995.00-
Reason Code							Difference Posting	s		

Step 4. Click on Document overview Enter the Payment Amount to Post the Payment for the Invoice document

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		Environment System	Help	Payment Amount entere
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Post Outgo	ing Payments Correc	t G/L account i	tem	
<u>&</u> 🚡 🗟 🛅 Ch	oose open items Process Open	Items 🏾 🔗 More data	A Model	
G/L Account	23110002 SBI Revenu	ie Account - 100 -085430	- Outgoing	
Company Code	1000 Mumbai Port Trust			
Item 1 / Credit ent	ry / 50			
Amount	58,995.00	INR		
		Calculate Tax		
Business place				
Profit Ctrs				
				😤 More
Value date	27.07.2020			
Assignment				

Step 5. Click on Document Tab→ Simulate: To Simulate the entered details for validation and Click on Post to post the document

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St Cutgor	n g Payments Disp ncy i Taxes s Reset	olay Overview	/	
Document Date		KZ	Commony Code	1000
Posting Date	27.07.2020 Type 27.07.2020 Perio		Company Code Currency	INR
Document Number		Year 2020	Translation dte	27.07.2020
Reference			Cross-CC Number	
Doc.Header Text	Calibration Maint		Trading part.BA	
Items in document of	currency			
	0023110002 SBI - Re 0040000442 FELIX EN	-	58,995.00- 58,995.00	

Step 6. Click on save The Vendor Payment document- 2300000023 is Posted successfully

Document 2300000026 was posted in company code 1000

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Step 7. Go to Transaction FB03 or Document Tab - Display → To Display the Payment document Posted

	y Document: Da	ata Entry View	1					
		🦻 📬 🥰 🚢 Display Currency 🗧 General Ledger View						
- 🎝 🗖 🗟 👄 💷 Dist	ay currency Rener	a Ledger View						
Data Entry View								
Document Number	2300000026	Company Code	1000	Fiscal Year	2020			
Document Date	27.07.2020	Posting Date	27.07.2020	Period	4			
Reference		Cross-Comp.No.						
Currency	INR	Texts Exist		Ledger Group				
				Ledger Group				
Currency	F. E. K. E.				x Cost Cente			

Step 8. Go to Document Tab – Select Print Preview for Document Overview

P		Docum	ent Overvie	w - Displa	iy i					
	. ₩	< → H	1 7 8 7 5	嶞 📴 Choose	5 Save	👿 🕒 📑	١T	Fax data	I 👌	
Doc	.ту	pe : KZ	(Vendor Paym	ent) Norma	al documen	nt				
Doc	. N	lumber	2300000026	Compar	ny Code	1000		Fiscal	Year	2020
Doc	. D)ate	27.07.2020	Postin	ng Date	27.07.20	20	Period		04
Cal	cul	ate Tax								
Doc	. c	Currency	INR							
		-	Calibration	Maint						
							<u>т</u> т			1
Ttm	PK	Account	Account Sh	ort Text	Assignmer	nt	Тx		Amount	
T OIII					-					
1 CIII										1
		23110002	SBI - Rev	- Outgoing	20200727			58	3,995.00-	

Step 9: Transaction FBZ5 → Go to Transaction FBZ5 for Printing the Check

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Ø	💌 🖉 🔄 🕄 🖓 👘 👘 👘 👘 🕄 💭 💭 🔚 💌
Print Form for	Payment Document
Document Number	230000026
Company Code	1000 Mumbai Port Trust
Fiscal Year	2020
Payment method and for	m specifications
Payment Method	C
Check Lot Number	1
Alternative Form	
Padding Character	
Output control	
Printer for Forms	ZLP01 Print Immediately
Payt Advice Printer	Recipient's Language
	Currency in ISO code
	✓ Test Printout
	Do Not Void Any Checks

Step 10. Click on check and print preview

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🖙 Print:					×
Output Device	ZLP01			D	
Page selection	L				
Spool Request					
Name	SMART		MZ00596723		
Title					
Authorization					
Spool Control				Number of Copies	
Print Now				Number	1
Delete After Output				Group (1-1-1,2-2-2,3-	-3-3,)
✓New Spool Request					
Close Spool Request				Cover Page Settings	
Spool Retention	8	Day(s)		SAP cover page	Do not print 🔹
Storage Mode	1	Print onl	у 🔻	Recipient	
				Department	
					📴 Print preview 🖨 Print 🗶

Print Preview of ZLP01 Page 00001 of 00001						
Archive 🔌 Print and Archive 🔍 🤤						
A/C Payee	27072020					
FELIX ENGG. CO.						
Fifty eight thousand nine hundred ninety five only						
	58,995.00					

Step 11. Transaction ZFI04 → Go to Transaction **ZFI04** – Enter **Company code**, **Current Date** and **Print** to create the Bank file for Vendor payment

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Text file to bank - Vendor Payment							
æ							
Company code	1000						
Current Date	27.07.2020	to					
• Print layout							

🖙 Print:							×	
Output Device	ZLP01							
Page selection								
Spool Request								
Name	SMART		MZ00596723					
Title								
Authorization								
Spool Control					Number of Copies			
Print Now					Number 1			
Delete After Output					Group (1-1-1,2-2-2,3-3-3,)			
New Spool Request								
Close Spool Request					Cover Page Settings			
Spool Retention	8	Day(s)			SAP cover page	Do not print	•	
Storage Mode	1	Print on	y ,	•	Recipient			
					Department			
						Print prev	view 🖨 Print 🗶	

Bank file created successfully:

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rint Preview of ZLP01 Page 00001 of 00001						
Archive	Print and Archive	0				
	١	MUMBAI POR				
Mumbai Port Trust Port House,S.V.Marg,Ballard Estate 400001 MUMBAI INDIA To,						
	ranch Manager, Bank Limited,					
Sir,						
You are	e requested to make payment	through A/c No: 1099	6685430 for the invoi	ces listed below.		
Row#	Party	Account No	IFSC	Amount	Remarks	
1	ALEX CHEMICAL & INDUSTRIES	307651100000204	IBKL0000307	2,587.00	230000024	
2	MAHARASHTRA BAMBOO BHANDAR			25,200.00	230000025	
3	FELIX ENGG. CO.	7234896734	SBIN0000290	58,995.00	230000026	
	Tota	Amount:		86,782.00		

Invoice will be parked for approval and same will be updated in the Purchase Order History. Enter Transaction Code ME22N in command bar (or) Follow the below navigation path.

Transaction Code	ME22N
Menu Path	Easy Access \rightarrow SAP Menu \rightarrow Office \rightarrow Workplace

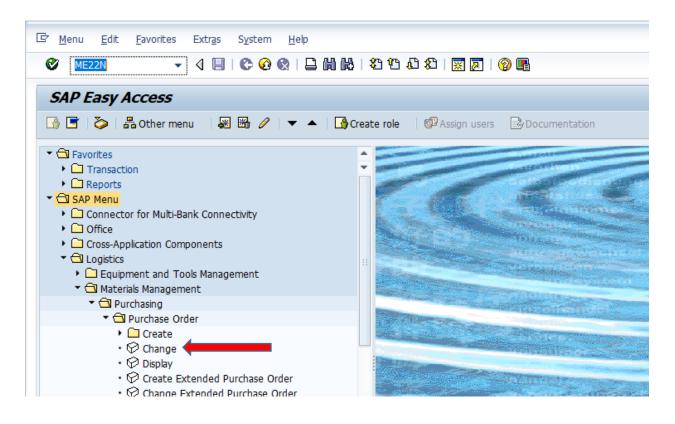
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Click on Other document and Enter Purchase Order: 4202000040.

Click on Other Document Button.

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STD Purchase Order 40	000010071 Created by	y PI_USER								
Document Overview On 🗏 🗋 🍄 📫	Print Preview Messages	s 🚺 🚈 Personal Sett	ting							
STD Purchase Order • 4000010071	Vendor 40000442 F	FELIX ENGG. CO.	Doc. Date 2	3.07.2020						
Header										
🗈 S Itm 🛛 A I Material	Short Text PC	O Quantity O	C Deliv. Date	Net Price	Curr F	er O	. Matl Group	Plnt	Stor.	L
	Cal/Stat/Survey Maint by	1 AU	D 31.12.2021	57,000.00	INR 1	AU	Constructio	Mumbai Port Trust		
					INR					Ψ.
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	TFFFFFFFFFFFFF	Default Values		Addl Pl	anning		a			
						_	_	·		
Item [1] Cal/Stat/Survey Mai	int by External Vendor 💌 🔼									
	ts Delivery Schedule Deli	livery Invoice Co	onditions Ind	lia Account As	sianment	Purch	ase Order Histo	orv Texts		
Material Data Ouantities/Weight					-	_				
Material Data Quantities/Weight										
		A								
Q 17 1 20			mt in Lon Cun L		DelCesto		Orden Drine II	at a second of		•
Sh. Text [*] MvT Material Document Item I	Posting Date 2 Quantity Delivery				DelCostQ	ty (OPUn)	Order Price U			•
Image: Shift			57,000.00 IN	IR	DelCostQ	ty (OPUn)	Order Price U	57,000.00 II	N	•
Sh. Text [®] MVT Material Document Item WE 101 <u>510100054</u> 1 1 Tr./Ev. Goods receipt	Posting Date 2 Quantity Delivery			IR IR	DelCostQ	ty (OPUn)	Order Price U			•
Sh. Text [®] MVT Material Document Item WE 101 <u>510100054</u> 1 1 Tr./Ev. Goods receipt	Posting Date ©Quantity Deliven 23.07.2020		57,000.00 IN 57,000.00 IN	IR IR	DelCostQ	ty (OPUn)	Order Price U	57,000.00 II • 57,000.00 I		•
Image: Second	Posting Date ©Quantity Deliven 23.07.2020		57,000.00 IN 57,000.00 IN 57,000.00 IN	IR III IIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	DelCostQ	ty (OPUn)	Order Price U	57,000.00 II • 57,000.00 I 57,000.00 I		•

Parked Invoice Approval:

Login as Approver in SAP System.

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Click on " 🎑

" SAP Business Workspace Button.

Enter Transaction Code SBWP in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access \rightarrow SAP Menu \rightarrow Office \rightarrow Workplace
☐ <u>M</u> enu <u>E</u> dit <u>F</u> avorites	Extr <u>a</u> s S <u>y</u> stem <u>H</u> elp
SBWP .	- 4 🔲 😋 🚱 🖵 🛍 🕌 谷 岱 岱 🎝 🖾 🗑 🔚
SAP Easy Access	
🖪 🖻 📀 🖁 Other m	enu 🛛 👪 🖉 🛛 🔻 🔺 🕞 Create role 🔤 🚳 Assign users 📑 Doc
Favorites	
Transaction	and the second se
 Reports 	
SAP Menu	
Connector for Multi-	Bank Connectivity
▼ ¹ Office	
• 🕑 Workplace 🗲	
Telephone Integ	
 Appointment Cal 	endar

Expand "Inbox" button, under workflow "Complete parked invoice 6010000020 2020" message will appear.

Double Click on the "Complete parked invoice 6010000020 2020 "message.

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* 🛫 Workplace: MP00611268	@@@@@@ `````` `````````````````````````							
 Drbox Unread Documents 13 	Workflow 29	Workflow 29						
 Documents 36 	Ex. Title	Status	Work Item ID Creation Da	Creation	P At Co	W Dynamic colu		
Workflow 29	Please approve the Parked Invoice 6010000020, Year 2020	Ø	415677 23.07.2020	13:19:49	5			
 D Overdue entries 0 	Please approve the Purchase Order 4000010071	0	415659 23.07.2020	13:04:49	5			
Deadine Messages 0	Please approve the Purchase Order 4000010064	Ø	414818 22.07.2020	11:52:04	5			
Entries with Errors 0	Please approve the Purchase Requisition 2001000963	0	415320 20.07.2020	02:34:58	5			
Outbox GResubmason	Please approve the Purchase Regulation 2001000963	0	414579 20.07.2020	02:33:46	5			
	Please approve the Purchase Requisition 2001000962	Ø	414487 19.07.2020	15:13:42	5			
Of Shared folders	Please approve the Purchase Regulation 2001000962	Ø	414486 19.07.2020	15:13:02	5			
Gr Subscribed Folders	Please approve the Purchase Requisition 2001000961	Ø	415262 19.07.2020	15:10:39	5			
• Trash	Please approve the Purchase Requisition 2001000961	0	415261 19.07.2020	15:10:16	5			
 Shared trash 	Please approve the Purchase Requisition 2001000959	0	415260 19.07.2020	15:10:03	5			
	Please approve the Purchase Requisition 2001000959	Ø	414485 19.07.2020	15:07:07	5			
	Please approve the Purchase Requisition 2001000959	Ð	414484 19.07.2020	15:06:38	5			
	Please approve the Purchase Regulation 2001000959	Ø	415258 19.07.2020	15:05:51	5			
	1.1							

It will open the Decision Step in Workflow Screen.

Click on Approve Button.

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년 Decision Edit Goto System Help							
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Decision Step in Workflow							
🖉 Workflow 🖞 Create 😢 Import							
Please approve the Parked Invoice 6010000020, Year 2020							
Choose one of the following alternatives							
Approve							
Reject							
Display							
Approval or Rejection History							
Hold							
Description	Objects and attachments						
Select one of the available decision options. This completes the processing of this step.	No attachments or objects exist						

Invoice Document will be approved and Posted for Vendor Payment.

Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments. If you choose **Cancel**, the user decision remains in your inbox for processing.

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w message 🋗 Find folder 🛛 🛗 Find document 🕫 App	ointment calendar 🛛 📓 Distribution lists			
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Grouped according to task Overdue entries 0	🖂 🚡 JMS 1100000012 is approved.	SAP_WFRT	23.07.2020 1	
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	Purchase Order 4000010071 is appro	oved. SAP_WFRT	23.07.2020 1	
Outbox Resubmission	Purchase Order 4000010071 is appro	oved. SAP_WFRT	23.07.2020 1	
Private folders	🖂 🕞 Purchase Order 4000010071 is appro	oved. SAP_WFRT	23.07.2020 1	
Shared folders	Purchase Order 4000010071 is appro		23.07.2020 1	
Subscribed Folders	M IMS 1100000010 is approved.	SAP_WFRT	22.07.2020 1	
Trash	Purchase Order 4000010064 is approximately approximatel	oved. SAP WFRT	22.07.2020 1	
	Purchase Order 4000010064 is appro		22.07.2020 1	

Technical Completion of Order

Go to Transaction Code IW32 and enter the preventive Maintenance order No

Change (Order: Ini	tial Screen				
Header data	Operations	Components	Costs	Additional data	Planning	Control
	T					
Order	100	00101 5				
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Select the Date and Time of Technically Closure of Order

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Order Saved as Technically Completed and updated in status TECO

Image: Change Calibration/Statutory/Survey Maintenance 1000101: Central Heade Image: Change Calibration/Statutory/Survey Maintenance 1000101: Central Heade Image: Complete (business) Order ZM03 Image: Complete (business) Order ZM03 Image: Complete (business)
Image: Sys.Status IECO GMPS JBFI NMAT PRC SETC
Order ZM03 DepT01 Cal/Stat/Survey Maint Sys.Status TECO GMPS JBFI NMAT PRC SETC 1
Sys.Status TECO GMPS JBFI NMAT PRC SETC
HeaderData Operations Components Costs Objects Additional Data Location Planning Control
Person responsible PlannerGrp 107 / 1000 MEED Notifctn Mn.wk.ctr EM_CME / 1000 PM CME Departm Costs 0.00 INR PMActType SystCond.
Dates
Bsc start 31.12.2021 Priority T Basic fin. 31.12.2021 Revision
Reference object
Func. Loc. 1000-COTN-0002 Kala Chowkey Image: Comparison of the
First operation
Operation Cal/Stat/Survey Maint Calc. key Calculate duration 💌
WkCtr/Pint PMC PMC PRT Work durtn 0 H Number Oprtn dur. 0 H Comp. H Comp.

Settlement of Order

Enter T code KO88 for Settlement to Cost Center

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Enter the Controlling Area 1000

Actual Settleme	nt: Order		
Settlement Rule			
- · · ·			
Controlling Area	1000		
Order	1000101		
Parameters			
Settlement Period	4	Posting period	
Fiscal Year	2020	Asset Value Date	
Processing Type	1 Automatic 👻		
Processing Options			
Test Run			
Check Trans. Data			

Enter Settlement Period 04 and Fiscal Year 2020 and remove test run Tick box

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Actual Settlement: Order Basic list					
H - 0					
Selection					
Selection Parameters	Value	Name			
Order	1000101	Cal/Stat/S	Survey Maint		
Period	004				
Posting Period	004				
Fiscal Year	2020				
Processing Type	1	Automatic	C		
Posting Date	31.07.2020				
Controlling Area	1000	MBPT Cor	ntrolling Area		
Currency					
Processing Op Selection Parameters	otions		Value		
Execution Type			Settlement Executed		
Processing Mode			Undate run		
Processing completed	I with no errors				
Statistics					
Processing Category			Σ Number		
Settlement Executed			1		
No Change					
Not Relevant					
Inappropriate Status					
Error					

Click on highlighted option called Detail List.

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Actual Settlement: Order Detail list					
Basic list 📓 🛛 🕄 🕄 Sender	🕄 Receiver	Accounting doo	cuments		
Detail list - Settled values					
Senders Short text: Sender	Receiver	Σ ValCOArCur	Inform.		
ORD 1000101 Cal/Stat/Survey Maint	CTR 10050401	57,000.00			
= 57,000.00					

Order Settled to the Cost Center

Closure of Order

Enter Transaction IW32

Change Order: Initial Screen						
Header data	Operations	Components	Costs	Additional data	Planning	Control 🛛 😽
Order		1000101	þ			

Press Enter, click on Complete Business or (ctrl+shift+12)

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👎 🛛 Ch	ange Calibration	n/Statutory/Su	rvey Maintenance 1	000101:	Central Heade
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Func. Loc. Equipment Assembly	1000-COTN-0002 10000340	Kala Chowkey 5 HP Pumping Set N	0. 1		





💌 🖌 Change Calil	bration/Statutory/Surve	y Maintenance 1000101: Centra
🐬 🇞 🔂 🖹 🖉 🗎 Co	mplete (business)	
Order ZM03 1000101 Sys.Status TECO GMPS JBF	Cal/Stat/Survey Maint	
HeaderData Operations	Components Costs Objects	Additional Data Location Planning Control
Person responsible	🕞 Complete order	×
PlannerGrp 107 / 1000 Mn.wk.ctr PM CME /	Completion possible with warning	Complete
	,p p	Log
Dates		X Cancel
Bsc start 31.12.2021		
Basic fin. 31.12.2021	Revision	

Click on complete, Status will be updated CLSD after execute it.

🦻 . C	hange Calibration/Statutory/Survey Maintenance	e 1000101:
7 😽 🖥	3 🗄 🖉 🗎	
Order	ZM03 00101 Cal/Stat/Survey Maint	2
Sys.Status	CLSD GMPS JBFI NMAT PRC SETC	

Order Closed for further posting.