



वैज्ञानिक तथा औद्योगिक अनुसंधान परिषद्
Council of Scientific & Industrial Research
अनुसंधान भवन 2 रफी मार्ग नई दिल्ली 110001
Anusandhan Bhawan, 2 Rafi Marg, New Delhi-110001



STANDARD OPERATING PROCEDURE
FOR
APPLICATION FOR COMPREHENSIVE CSIR ENTERPRISE
FOR STORES AND SUPPLIES (ACCESS)
SOFTWARE

S. No	Prepared by	Date	Version Number
1.	ACCESS Software S&P Committee	30-04-2024	Version 1.0



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DESIGN BASIS OF SOFTWARE

1. Login ID as per AMS (account manager software), six digit numeric ID.
2. Centralised Server as of now hosted at NAL. Disaster recovery is planned at 4 PI in initial phase. Subsequently another DR site is planned at Delhi or suitable location in a different city than Bangalore.
3. No Item categorisation at indent stage. Item categorisation will be done by PDA at the time of order creation for all types of indents other than without quotation. For without quotation indents (**Cash purchase indent**) by SDA at the time of DRR.
4. No vendor master at indent stage. All users can type the vendor names in free text. Vendor master will be added / edited by PDA during order creation or SDA during stock entry.
5. No budget checking / validation at indent stage. The budget commitment will be maintained during order creation for all types of indents other than without quotation and at the time of approval by SPO for without quotation indents.
6. Indenting work flow will be as per project selected. All indents of team member (s) will flow to respective project leader after whose approval Indent will flow to PME. PME can route the indent to FAO (for project balances) or directly send to SPO. Once SPO approves, it will appear in Create PO (by PDA) or DRR / GRIN creation by SDA.
7. Role based Pending / inbox. Many persons can be given the same role. All persons with same role can see the same list of pending indents. Audit trail will capture credentials of the person who has processed the indent to the next role.
8. All vouchers of Stores like issue voucher etc., when initiated by team member will flow to project leader and then to stores.
9. For entering legacy purchase orders i.e. orders created outside the ACCESS portal earlier, Manual entry DRR is to be used.

IMPREST / ROTATION ADVANCE / CASH PURCHASE DRAWN BY
SERVICE DIVISIONS

1. Noting in e-office seeking approval of Director for Imprest advance out of GDA.
2. Draw Bill in AMS cash code P99107, Classification code P90809, Project is INFRA, Nature Code 06, Staff name & amount for initial advance.
3. Raise without quotation indents in ACCESS Portal (for specific procurements)
4. Make cash purchase
5. Stock enter the cash bills.
6. Reimburse the bills with 4C to employee
7. Following Step 3 to 6 repeatedly. This will top-up the rotation advance / IMPREST.
8. By 20th March financial year end return the advance amount (or) balance amount to bank account of lab.
9. Generate valuable receipt in AMS with the same cash code, Project number etc., against the OB
10. Adjust the advance in AMS.



DESIGN BASIS

1. Indent Consumables (Including Spares)

S. No.	Field Name	Field type	Comments
1.	Procurement Mode	Drop down GEM / WQT / LPC / OTE / GTE / STE / LTE	Select the Procurement mode
2.	Project Nos	List of projects	Click the project number listed
3.	Project Name	Display	Project Name will get displayed based on the project number selected
4.	Indent type	Capital / Consumable	Choose the indent type as consumable
5.	Select Budget head	List of all consumable / capital heads	Select the consumables budget head from the list
6.	Additional Project Details If Any:	Text field	Enter additional project details if needed. This is required only if the total cost of indent cannot be met from one single project / budget head.
7.	Add Item: Detailed spec	Text field	Enter item name with Specification
8.	Quantity	Numeric field	Except Numbers, Set, Boxes, Pair & Roll remaining values can be in 2 decimal points
9.	Unit of Measure	Drop down	Select the units from the dropdown
10.	Cost(INR)	Numeric field	Enter the unit cost of the item. This is to include all taxes, delivery charges etc.
11.	Total Amount	Calculated display	The total amount will be auto calculated and will display
12.	Delivery Date	DD-MM-YYYY	Select the delivery date, the date should be greater than the server date and be a realistic time period.
13.	Justification for Procurement and Proposed End Use	Text field	Enter the end use of the item
14.	Action	Add Button	After entering all the fields, add button is clicked to add the item to the indent. Without entering all the fields this add button does not work
15.	Total Purchase Indent Estimated Cost	Calculated display	This is also calculated field, will display the total indent value after adding the items to the indent.
16.	Scope of supply and indent services	Text field	Enter the scope of supply, whether it includes installation, commissioning, training and other allied services.
17.	Items to be inspected within	Drop down	Select the days in which item will be inspected by the Indentor.
18.	Acceptance test	Text field	Enter any acceptance test needed in detail
19.	Previous purchase details last 3 years (Mandatory for STE-Spl R&D)	Text field	Mention the previous purchase details if any. This is mandatory for Specialised R & D item.

20.	The availability of the item on GeM	Yes / No - Radio button	<ul style="list-style-type: none"> • In case of GEM indent – It is by default yes only and option cannot be toggled to No. • Remaining indent types select No and GEM PART ID, Date and Reason need to be filled • GEM PART Date should be within 30 days from the server date. • GEM PART ID and report is to be generated from the GEM portal separately. • There is no validation at this point of time with the GEM portal. (But validation will be done in future).
21.	PAC	Yes/No/Single - Radio button	<p>Select YES / NO / Single</p> <ul style="list-style-type: none"> • If YES / Single is clicked then it is mandatory to enter one vendor detail
22.	Is Emergency Procurement Director's approval (Certificate 2A)	Yes / No - Radio button	Select YES / NO (Separate upload feature will be provided later).
23.	Delivery Location	Text field	<p>Enter the delivery location where the item need to be dispatched. e.g. For CMERI, it can be Durgapur or Ludhiana For CLRI, it can be Chennai or unit name Jalandhar For SERC, it can be Taramani campus or TTRS Campus For CSMCRI, it can be Bhavnagar or Mandapam. And in similar manner, for other labs</p>
24.	Vendor Details	Text field	<p>Enter the Vendor Name. Following points need to be borne in mind</p> <ul style="list-style-type: none"> • For LPC, Limited Tender Enquiry at least one vendor • For PAC, Global and PAC combination, STE - one vendor
25.	Upload the Specification Document	Upload	<p>Specification file can be upload using the upload button. Only PDF will be accepted. If indent has more than one item, all item specifications to be combined into one single file.</p>
26.	Save	Button	<p>Clicking this save button, the indent will be saved and submitted. After the indent has been submitted it moves to the next role i.e PL / PME based on the project selected.</p>
27.	Reset	Button	If entered fields need to be reset, this button can be used to reset the values.



2. INDENT CAPITAL

S. No.	Field Name	Field type	Comments
1	Procurement Mode	Drop down GEM / WQT / LPC / OTE / GTE / STE / LTE	Select the Procurement mode
2	Project Nos	List of projects	Click the project number listed
3	Project Name	Display	Project Name will get displayed based on the project number selected
4	Indent type	Capital / Consumable	Choose the indent type as capital
5	Select Budget head	List of all consumable / capital heads	Select the capital budget head from the list
6	Select Asset type	List of asset heads	Select the asset type
7	Additional Project Details If Any:	Text field	Enter additional project details if needed. This is required only if the total cost of indent cannot be met from one single project / budget head
8	Add Item: Detailed spec	Text field	Enter item name with Specification
9	Quantity	Numeric field	Except Numbers, Set, Boxes, Pair & Roll remaining values can be in 2 decimal points
10	Unit	Drop down	Select the units from the dropdown
11	Cost(INR)	Numeric field	Enter the unit cost of the item. This is to include all taxes, delivery charges etc.
12	Total Amount	Calculated display	The total amount will be auto calculated and will display
13	Delivery Date	DD-MM-YYYY	Select the delivery date, the date should be greater than the server date and be a realistic time period.
14	Justification for Procurement and Proposed End Use	Text field	Enter the end use of the item
15	Action	Add Button	After entering all the fields, add button is clicked to add the item to the indent. Without entering all the fields this add button does not work
16	Total Purchase Indent Estimated Cost	Calculated display	This also the calculated field, will display the total indent value after adding the items to the indent.
17	The Installation or Commissioning of the item shall be done by	Dropdown: Indentor /Supplier /Manufacturer/ Indian Rep/ Authorized agent /Dealer/ Not required	Choose the appropriate option from the list

18	Whether the purchase is to be made on the buy-back basis	Yes / No - Radio button	Buy back will appear where if YES is checked then fill the required details.
19	The installation requirements like area, power, civil works etc. are ready	Yes / No - Radio button	Select YES / NO. if site is not ready, then the time limit by which it will be ready has to be mentioned.
20	Warranty Period (in Months)	Numeric field	Enter the warranty period in months. The value should be whole number.
21	Whether CAMC/AMC	Yes / No - Radio button	Select YES / NO If YES is mentioned enter the AMC period in months. The value should be whole number.
22	Training Details	Text field	Enter the training details for eg., How many persons, content of training etc.,
23	Items to be inspected within	Drop down	Select the days in which item will be inspected .
24	Acceptance test	Text field	Enter any acceptance test needed in detail.
25	Previous purchase details last 3 years	Text field	Mention the previous purchase details if any.
26	The availability of the item on GeM	Yes / No - Radio button	<ul style="list-style-type: none"> • In case of GEM indent – It is by default yes only and option cannot be toggled to No. • Remaining indent types select No and GEM PART ID, Date and Reason need to be filled • GEM PART Date should be within 30 days from the server date. • GEM PART ID and report is to be generated from the GEM portal separately. • There is no validation at this point of time with the GEM portal. (But validation will be done in future).
27	PAC	Yes/No/Single - Radio button	Select YES / NO / Single If YES / Single is clicked then it is mandatory to enter one vendor detail
28	Is Emergency Procurement Director's approval (Certificate 2A)	Yes / No - Radio button	Select YES / NO (Separate upload feature will be provided later).
29	Delivery Location	Text field	Enter the delivery location where the item need to be dispatched. e.g. For CMERI, it can be Durgapur or Ludhiana For CLRI, it can be Chennai or unit name Jalandhar. For SERC, it can be Taramani campus or TTRS Campus For CSMCRI, it can be Bhavnagar or Mandapam. And in similar manner, for other labs
30	Vendor Details	Text field	Enter the Vendor Name. Following points need to be bear in mind <ul style="list-style-type: none"> • For LPC, Limited Tender Enquiry at least one vendor • For PAC, Global and PAC combination, STE - one vendor
31	Upload the Specification Document	Upload	Specification file can be upload using the upload button. Only PDF will be accepted. If indent has

			more than one item, all item specifications to be combined into one single file.
32	Save	Button	Clicking this save button, the indent will be saved and submitted. After the indent has been submitted it moves to the next role i.e PL / PME based on the project selected.
33	Reset	Button	If entered fields need to be reset, this button can be used to reset the values.

3. INDENT RC

S. No.	Field Name	Field type	Comments
1.	Procurement Mode	RC	The procurement mode is selected default as RC
2.	Project No	List of projects	Click the project number listed
3.	Project Name	Display	Project Name will get displayed based on the project number selected
4.	Indent Type	Consumable	The indent type field is Frozen as Consumables
5.	Select Budget Head	List of all consumable heads	Select the consumable budget head from the list
6.	Vendor Search	List of all vendor	Select the vendor's name from the list available
7.	Search by Item/Vendor	List of all items	Select the items needed from the list available based on the vendor selection (RC items should have been uploaded by the respective lab).
8.	Cat. No	Fetched from Database uploaded during RC upload.	
9.	Details of the items		
10.	Pack Size		
11.	Unit Size		
12.	Unit Rate		
13.	Quantity	Numeric field	Except Numbers, Set, Boxes, Pair & Roll remaining values can be in 2 decimal points
14.	Discount	Fetched from Database uploaded during RC upload.	
15.	Taxes		
16.	Amount		
17.	Action	Add Button	After entering all the fields, add button is clicked to add the item to the indent. Without entering all the fields this add button does not work
18.	Total Amount	Calculated display	The total amount will be auto calculated and will display
19.	The availability of the item on GeM	Yes / No - Radio button	<ul style="list-style-type: none"> • Default No - Enter GEM Part ID, date & Reason. • GEM PART Date should be within 30 days from the server date. • GEM PART ID and report is to be generated from the GEM portal separately. • There is no validation at this point of time with the GEM portal. (But validation will be done in future).
20.	Reset	Button	While giving the reset option, All the fields are clearing expect the Added items.
21.	Submit	Button	Clicking this submit button, the indent will be saved and submitted. After the indent has been submitted it moves to the next role i.e PL / PME based on the project selected.



4. INDENT AMC

S. No	Field Name	Values	Suggestion
1	Procurement Mode	GEM/WQT/LPC/STE/LTE/OT/GT	Select the Procurement mode
2	Indent Type	Consumable	The indent type field is Frozen as Consumables
3	Project Nos	List of projects	Click the project number listed
4	Select Budget head	List of all consumable heads	Select the consumable budget head from the list
5	Present Condition of the goods	Radio button - Working / Not Working	Select the option which states the condition of the item. If Not working is selected means enter the reason and condition of the item
6	Whether AMC is required	Radio button - Comprehensive / Non-Comprehensive	Select the type of AMC required
7	Whether User Log Book is maintained	Radio button - Yes / Not Applicable	Select the option YES / Not Applicable
8	Whether AMC is to be entered with	Radio button - OEM/Indian Agent/Authorized Dealer/ Service Provider/Third Party Supplier	Choose the option from the list. If Service provider or Third-Party Supplier, the reason for selecting them need to be given.
9	Whether AMC is being done for	Radio button - First Time / Renewal	Select the option, based on it fill the details required / asked
10	Post Warranty is party continuing service	Text box	Mention the details if the party is continuing the services post warranty period
11	If renewal service provided by the AMC holder	Radio button -Satisfactory / Unsatisfactory	Select any of the radio button. If unsatisfactory is selected means mention the reason for unsatisfactory
12	Date at which previous contract ended	Text box	Enter the date in which the previous contract ended (This is applicable only for renewal of AMC)
13	The availability of the item on GeM	Yes / No - Radio button	<ul style="list-style-type: none"> • Select YES / NO option. If No is selected means enter the GEM PART ID, Date & Reason. • GEM PART Date should be within 30 days from the server date. • GEM PART ID and report is to be generated from the GEM portal separately. • There is no validation at this point of time with the GEM portal. (But validation will be done in future).
14	No. Preventive maintenances visits	Text box	Mention the number of preventive maintenances visit. The number should be whole value
15	No. Breakdown visits	Text box	Mention the number of breakdown visit.

			The number should be whole value
16	Name of the Firm/Full Address of Service Provider	Text box	Enter the name of the vendor / service provider
17	Delivery Location	Text box	Enter the delivery location where the item need to be dispatched. e.g. For CMERI, it can be Durgapur or Ludhiana For CLRI, it can be Chennai or unit name Jalandhar For SERC, it can be Taramani campus or TTRS Campus For CSMCRI, it can be Bhavnagar or Mandapam. And in similar manner, for other labs
18	Add Item: Detailed spec	Text field	Enter item name with Specification
19	Quantity	Numeric field	Except Numbers, Set, Boxes, Pair & Roll remaining values can be in 2 decimal points
20	Unit	Drop Down	Select the units from the dropdown
21	Unit Cost	Numeric field	Enter the unit cost of the item. This is to include all taxes, delivery charges etc.
22	Total Amount	Calculated field	The total amount will be auto calculated and will display
23	Delivery Date	DD-MM-YYYY	Select the delivery date, the date should be greater than the server date and be a realistic time period.
24	Justification for Procurement and Proposed End Use	Text field	Enter the end use of the item
25	Action	Add Button	After entering all the fields, add button is clicked to add the item to the indent. Without entering all the fields this add button does not work
26	Total Purchase Indent Estimated Cost:	Calculated field	This is also calculated field, will display the total indent value after adding the items to the indent.
27	Save	Button	Clicking this save button, the indent will be saved and submitted. After the indent has been submitted it moves to the next role i.e PL / PME based on the project selected