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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
2.	ACCESS Software S&P Committee	16-08-2024	Version 1.1

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1. DESIGN BASIS OF SOFTWARE

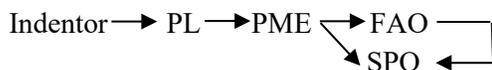
1. Login ID as per AMS (account manager software), six digit numeric ID.
2. Centralised Server as of now hosted at NAL. Disaster recovery is planned at 4 PI in initial phase. Subsequently another DR site is planned at Delhi or suitable location in a different city than Bangalore.
3. No Item categorisation is done at indent stage. Item categorisation will be done by PDA at the time of order creation for all types of indents other than direct purchase. For direct purchase indents **(Cash purchase indent)** by SDA at the time of GRIN Entry.
4. No vendor master is provided at indent stage. All users can type the vendor names as free text. Vendor master will be added / edited by PDA during order creation or
5. SDA during GRIN entry.
6. No budget checking / validation at indent stage. The budget commitment will be maintained during order creation for all types of indents other than direct purchase and at the time of approval by SPO.
7. Indenting work flow to PL 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. In case of Indentor being the Project Leader, the Indent will be self-approved and flow to PME. PME can route the indent to FAO (for project balances) or directly send to SPO. Once SPO approves, it will appear to Create PO (by PDA) or to SDA to create DRR/GRIN.
8. 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 / GRIN etc., Audit trail will capture the details of the person who has processed the indent / GRIN to the next role.
9. All vouchers of Stores like issue voucher etc., when initiated by team member will flow to project leader and then to stores.
10. For entering legacy purchase orders i.e. orders created outside the ACCESS portal earlier, Manual entry DRR is to be used.

2. 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 direct purchase 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.

3. INDENTS

Workflow for all types of Indents:



- After IO submits the indent, it flows to PL where in PL’s page under Indent for approval, the list of indents raised will be shown, by clicking the link, PL can see the indent and feed in the remarks and click approved / reject. If approved means it will moves to PME and if rejected means the flow will get stopped. In case of Indentor being the Project Leader, the Indent will be self-approved and flow to PME
- Same as PL, PME can approve / reject the indent by feeding the remarks in PME’s Role. If approved, PME can select whether it flows to FAO or SPO. Indent moving to FAO’s role will depend on the lab’s division of responsibilities in CSIR Projects / ECF Projects / csir Lab grants under heads like contingency / staff quarters maintenance / Lab maintenance etc.
- Under FAO’s page, under indent for approval, FAO can approve / reject the indent. If approved it will automatically move to SPO
- Then in SPO page, SPO can check the indent and if all correct, SPO need to enter the remarks and approve the indent
- Once SPO approves the indent, it automatically flows to PDA login page for Order Creation for all indents other than Direct Purchase. For direct purchase indents, it will be listed in GRIN creation page.

Note:

- There are several budget heads like centrally operated heads, Award/Fellowship/Emeritus, GDA which are to be operated in the lab as per the lab’s policy and allocation by CSIR.

3. a) INDENT CONSUMABLES (INCLUDING SPARES)

Pre-Requisites

- Create GeM Part ID for all types of indents other than GeM
- Scanned copy (.pdf) of Specifications / Quotation / Drawings / Annexures etc.,

S. No.	Field Name	Field type	Comments
1.	Procurement Mode	Drop down GeM / Direct Purchase / LPC / Other than GeM, Direct Purchase & LPC	Select the Procurement mode. Indents other than GeM, Direct purchase and LPC will include Limited tender, Global tender, open tender, special limited tender, PAC and Specialised R&D.
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 heads	Select the consumables budget head from the list
6.	Select Sub Budget Head	List of all consumable Sub Budget Heads	Select the consumables sub budget head from the list as per available project allocation.
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.	Unit of Measure	Drop down	Select the units from the dropdown
10.	Quantity	Numeric field	Except Numbers, Set, Boxes, Pair & Roll remaining values can be in 2 decimal points
11.	Unit 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 is also calculated field, will display the total indent value after adding the items to the indent.
17.	Scope of supply and indent services	Text field	Enter the scope of supply, whether it includes installation, commissioning, training and other allied services.
18.	Items to be inspected within	Drop down	Select the days in which item will be inspected by the indenter.
19.	Acceptance test	Text field	Enter any acceptance test needed in detail
20.	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.
21.	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. For all Indent types other than GeM, Default Selection is No. Indenter has to fill in GeMARPTS ID, Date. If Indenter wants to select Item available on GeM as Yes, then in that case Reason need to be filled in addition to GeMARPTS ID and Date. GeMARPTS Date should be within 30 days from the server date.

			<ul style="list-style-type: none"> GeMARPTS 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).
22.	PAC	Yes/No/Single - Radio button	Select YES / NO / Single <ul style="list-style-type: none"> If YES / Single is clicked then it is mandatory to enter one vendor detail
23.	Is Emergency Procurement Director's approval (Certificate 2A)	Yes / No - Radio button	Select YES / NO (Separate upload feature will be provided later).
24.	Delivery Location	Text field	Enter the delivery location where the item need to be dispatched. For eg. CLRI - Chennai or unit name Jalandhar Eg. SERC Taramani campus or TTRS Campus for SERC.
25.	Vendor Details	Text field	Enter the Vendor Name. Following points need to be borne 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
26.	Upload the Specification Document (VIZ Specification Drawing, Annexures etc..)	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.
27.	Self-Certification	Check box	Select the self-certification by clicking the checkboxes
28.	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.
29.	Reset	Button	If entered fields need to be reset, this button can be used to reset the values.

3. b) INDENT CAPITAL

Pre-Requisites

- Create GeM Part ID for all types of indents other than GeM
- Scanned copy (.pdf) of Specifications / Quotation / Drawings / Annexures etc.,

S. No.	Field Name	Field type	Comments
1	Procurement Mode	Drop down GeM / Direct Purchase / LPC / Other than GeM, Direct Purchase & LPC	Select the Procurement mode. Indents other than GeM, Direct purchase and LPC will include Limited tender, Global tender, open tender, special limited tender, PAC and Specialised R&D.
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 capital heads	Select the capital budget head from the list
6	Select Sub Budget Head	List of all capital Sub Budget Heads	Select the capital sub budget head from the list as per available project allocation.
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	Unit of Measure	Drop down	Select the units from the dropdown
10	Quantity	Numeric field	Except Numbers, Set, Boxes, Pair & Roll remaining values can be in 2 decimal points
11	Unit Cost(INR)	Numeric field	Enter the unit cost of the item. This is to include all taxes, delivery charges etc.
12	Total Purchase Indent Estimated Cost	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. For all Indent types other than GeM, Default Selection is No. Indentor has to fill in GeMARPTS ID, Date. If Indentor wants to select Item available on GeM as Yes, then in that case Reason need to be filled in addition to GeMARPTS ID and Date. GeMARPTS Date should be within 30 days from the server date. GeMARPTS 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 For eg. For CLRI - Chennai or unit name Jalandhar. Eg. SERC Taramani campus or TTRS Campus for SERC.
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 (VIZ Specification Drawing, Annexures etc..)	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	Self-Certification	Check box	Select the self-certification by clicking the checkboxes
33	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.
34	Reset	Button	If entered fields need to be reset, this button can be used to reset the values.

3. c) INDENT RC

Pre-Requisites

- View RC items by selecting budget code, sub budget code & OEM vendor name
- Create GeM Part ID

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.	Select Sub Budget Head	List of all consumable Sub Budget Heads	Select the consumables sub budget head from the list as per available project allocation.
7.	Vendor Search	List of all vendor	Select the vendor's name from the list available
8.	Search Item	List of all items (Search item name by typing min 3 characters in small letters no capital letters)	Select the items needed from the list available based on the vendor selection (RC items should have been uploaded by the respective lab).
9.	Cat. No	Fetched from Database uploaded during RC upload.	
10.	Details of the items		
11.	Unit/Pack Size		
12.	Unit of Measure		
13.	Unit Rate		
14.	Quantity	Numeric field	Except Numbers, Set, Boxes, Pair & Roll remaining values can be in 2 decimal points
15.	HSN Code	Fetched from Database uploaded during RC upload.	
16.	Discount	Fetched from Database uploaded during RC upload.	
17.	Taxes		
18.	Amount		
19.	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
20.	Total Purchase Indent Estimated Cost	Calculated display	The total amount will be auto calculated and will display
21.	GeMARPTS ID (<i>GeM Availability Report & Past Transaction summary</i>)	Text box	<ul style="list-style-type: none"> • Default Selection is No. Indentor has to fill in GeMARPTS ID, Date. If Indentor wants to select Item available on GeM as Yes, then in that case Reason need to be filled in addition to GeMARPTS ID and Date. • GeMARPTS Date should be within 30 days from the server date. • GeMARPTS ID and report is to be generated from the GEM portal separately.

			<ul style="list-style-type: none"> There is no validation at this point of time with the GEM portal. (But validation will be done in future).
22.	GeM Date	DD-MM-YYYY	GeMARPTS Date should be within 30 days from the server date.
23.	Reason for the items available on GeM being not processed for purchase	Text box	Enter the reason
24.	Delivery Location	Text box	Enter the delivery location where the item need to be dispatched. For eg. For CLRI -Chennai or unit name Jalandhar Eg. SERC Taramani campus or TTRS Campus for SERC.
25.	Delivery Date	DD-MM-YYYY	Select the delivery date, the date should be greater than the server date and be a realistic time period
26.	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.
27.	Reset	Button	While giving the reset option, All the fields are clearing expect the Added items.

3. d) INDENT AMC

Pre-Requisites

- Create GeM Part ID

S. No	Field Name	Values	Suggestion
1	Procurement Mode	Drop down GeM / Direct Purchase / LPC / Other than GeM, Direct Purchase & LPC	Select the Procurement mode. Indents other than GeM, Direct purchase and LPC will include Limited tender, Global tender, open tender, special limited tender, PAC and Specialised R&D.
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	Select Sub Budget Head	List of all consumable Sub Budget Heads	Select the consumables sub budget head from the list as per the available project allocation.
6	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
7	Type of AMC required	Radio button - Comprehensive / Non-Comprehensive	Select the type of AMC required
8	No. Preventive maintenances visits	Text box	Mention the number of preventive maintenances visit. The number should be whole value

9	No. Breakdown visits	Text box	Mention the number of breakdown visit. The number should be whole value
10	Duration of AMC (In Months)	Text box	Mention the duration of AMC. The number should be whole value
11	Whether User Log Book is maintained	Radio button - Yes / Not Applicable	Select the option YES / Not Applicable
12	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 / justification for selecting them need to be given.
13	Whether AMC is being done for	Radio button - First Time / Renewal	Select the option, based on it fill the details required / asked
14	Post Warranty is party continuing service	Text box	Mention the details if the party is continuing the services post warranty period
15	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
16	When the contract period ended	Text box	Enter the date in which the previous contract ended (This is applicable only for renewal of AMC)
17	Amount for the AMC	Text box	Enter the Amount for the AMC
18	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. • For all Indent types other than GeM, Default Selection is No. Indentor has to fill in GeMARPTS ID, Date. If Indentor wants to select Item available on GeM as Yes, then in that case Reason need to be filled in addition to GeMARPTS ID and Date. • GeMARPTS Date should be within 30 days from the server date. • GeMARPTS 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).
19	Name of the Firm/Full Address of Service Provider	Text box	Enter the name of the vendor / service provider
20	Delivery Location	Text box	Enter the delivery location where the item need to be dispatched. For eg. For CLRI -Chennai or unit name Jalandhar Eg. SERC Taramani campus or TTRS Campus for SERC
21	Add Item: Detailed spec	Text field	Enter item name with Specification
22	Unit of Measure	Drop Down	Select the units from the dropdown
23	Quantity	Numeric field	Except Numbers, Set, Boxes, Pair & Roll remaining values can be in 2 decimal points
24	Unit Cost	Drop Down	Select the units from the dropdown
25	Unit Cost	Numeric field	Enter the unit cost of the item. This is to include all taxes, delivery charges etc.

26	Total Cost	Calculated field	The total amount will be auto calculated and will display
27	Delivery Date	DD-MM-YYYY	Select the delivery date, the date should be greater than the server date and be a realistic time period.
28	Justification for Procurement and Proposed End Use	Text field	Enter the end use of the item
29	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
30	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.
31	Self-Certification	Check box	Select the self-certification by clicking the checkboxes
32	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
33	Reset	Button	While giving the reset option, All the fields are clearing expect the Added items.

4. Vendor Master Creation

Vendor master is necessary in the case of PO creation & GRIN entry. Hence, in PDA login “Add Vendor” link is given to search and update the vendor

S.No	Field Name	Values	Suggestion
1	Search Vendor Name	Text Box	In order to avoid duplicate entry of vendor details, Check whether the vendor is already added or not, by Searching the vendor name. Search can be done by entering vendors full name not partial (or) use Ctrl+F in browser for partial search
2	Vendor Name*	Text Box	Enter Vendor Name without using any prefix like M/s.
3	Vendor Address*	Text Box	Enter Vendor Address including state
4	Country*	Drop Down	Select the country from the drop down list
5	Vendor GST No*	Text Box	Enter the GST Number (GST number mandatory)
6	Phone Number	Text Box	Enter the Phone Number
7	Email Id	Text Box	Enter the Email ID
8	PAN Number	Text Box	Enter the PAN number
9	IBAN Number	Text Box	If country is other than India enter the IBAN number
10	Contact Person Name	Text Box	Enter the name of the contact person
11	Contact Person Mobile Number	Text Box	Enter the phone number

12	Bank Name [#]	Text Box	If country is India, then enter the bank name
13	Bank Account Number [#]	Text Box	If country is India, then enter the account number.
14	Branch Name [#]	Text Box	If country is India, then enter the branch name.
15	IFSC Code [#]	Text Box	If country is India, then enter the IFSC Code
16	Routing Number ^{&}	Text Box	If country is other than India then enter the Routing number
17	Foreign Bank Name ^{&}	Text Box	If country is other than India then enter the Foreign bank name
18	Foreign Bank Address ^{&}	Text Box	If country is other than India then add Foreign bank address.
19	SWIFT Code ^{&}	Text Box	If country is other than India then add SWIFT code.
20	Beneficiary name ^{&}	Text Box	If country is other than India then enter the beneficiary name
21	Beneficiary Address ^{&}	Text Box	If country is other than India then enter the beneficiary address
22	Save	Button	By clicking save, the vendor details will be added to the database

Note:

- * are mandatory field
- # are filtered based on the selection of country as INDIA
- & are filtered based on the selection of country for OTHER THAN INDIA
- Finally Click "Add" and vendor details will be added successfully. (Use Tab/Mouse to move from one option to another, don't press enter at any tab it will get submitted with incomplete details)

The screenshot shows a web application interface for adding vendor details. The top navigation bar includes 'ACCESS' and user icons for EMPLOYEE, FAO, PDA, PME, SDA, SO-PURCHASE, SO-STORES, SPO, and a profile icon for GANAPATHY K.P.S. The main content area is titled 'vendor Details' and contains a search bar and a form with fields for Vendor Name, Vendor Address, Country, Vendor GST NO, Phone Number, Email Id, Pan Number, IBAN Number, Contact Person Name, Contact Person Mobile Number, Bank Name, Bank Account Number, Branch Name, IFSC Code, Routing Number, Beneficiary name, and Beneficiary Address. A 'Save' button is at the bottom.

- Already added vendor details will be shown below in the same page. So before adding new vendor details check it and then add

Save

Vendor Name	Vendor Address	Contact Number	Vendor GST
FERINA SHOPPING MALIGAI	17, SEKKALAI ROAD, PERIYAR STATUE, KARAIKUDI - 630001	9443564411	33ATMPS6342J1Z9
SANATHANA RETAILS LLP	BUILDING 2 (WH 2), PLOT NO. 12/P2 (IT SECTOR), HITECH, DEFENCE AND AEROSPACE PARK, DEVANAHALLI, BENGALURU - 562149	9962100026	29AARFN7490C1ZQ
Karunambigai Info System & Services	12, Madurai Road Madurai Mukku Sivangagai - 630561	9865152540	33AIPP2826A1ZJ
INFRES METHODEX PRIVATE LIMITED	BLOCK NO. B-1 PLOT NO. D-7 MOHAN CO-OPERATIVE INDL. ESTATE, NEW DELHI - 110044	9818422002	07AABCI1964R1Z1
OM CORPORATIONS	OLD NO. 2, NEW NO. 20, F2-FIRST FLOOR, CITY LIMIT ROAD, SECRETARIAT COLONY, ADAMBAKKAM, CHENNAI - 600088	7338747244	33ACDPK0834H1Z1

- We can also edit the vendor details by simply searching the vendor's name in full not partial and update the information

5. Level 3 Categorization

- ✚ Level 3 categorization means the generic item name. For eg. Photocopy paper, Laptop, etc.,
- ✚ It is required during PO creation and in GRIN entry for without PO cases. Hence, before entering into PO creation and GRIN Entry, check whether the item is already categorized or not.
- ✚ This adding category Level 3 is available in both PDA & SDA login page under the heading “Add Category Level-3”. It is to be done with care. As of now, item added cannot be edited / deleted.
- ✚ The already added item in level 3 can be filtered out by selecting the budget head and sub budget head.

S.No	Field Name	Values	Suggestion
1	Select Budget Head	Drop Down	Select the budget head based on PO / Indent (direct purchase – without PO)
2	Select Level-2	Drop Down	Select the sub budget head based on PO / Indent (direct purchase – without PO)
3	Add Third Level	Text Box	Enter the generic item name
4	Submit	Button	By clicking the submit button, the item will be added to the budget head selected

GRIN Entry

Direct Grin Entry

Clearance

GRIN Report

Stock Inward

Stores Stock Entry

Stores Stock Entry Report

Store Issues Slip

Stock Report

Add Category Level-3

Add Category Level-4

Upload Signed GRIN

List of GRIN

Add Category Level-3

Select Budget Head:

Select Level-2: Add Third Level

Third Level Item List

Sub Budget Head	Third Level Item Name
COMPUTER EQUIPMENT/MAJOR SOFTWARE	All in One PC
COMPUTER EQUIPMENT/MAJOR SOFTWARE	Computer
COMPUTER EQUIPMENT/MAJOR SOFTWARE	Computer Workstation

6. Level 4 Categorization

- ✚ Level 4 categorization is only for items to be added in stores inventory. The finer specifications after generic name should be entered as Level 4. For eg. When Photocopy paper is level 3, then A4 paper white 75gsm will be level 4. A3 paper white 80gsm will be another level 4 item
- ✚ Level 4 categorization is required for replenishment items during Stock entry. Hence, before entering into Stock Entry page, check whether the item is categorized or not
- ✚ This adding category Level 4 is available in SDA login page under the heading “**Add Category Level-4**”. It is to be done with care. As of now, item added cannot be edited / deleted
- ✚ The already added item in level 4 can be filtered out by selecting the budget head, Level 2 & Level 3.

S.No	Field Name	Values	Suggestion
1	Select Budget Head	Drop Down	Select the budget head based on PO / Indent (direct purchase – without PO)
2	Select Level-2	Drop Down	Select the sub budget head based on PO / Indent (direct purchase – without PO)
3	Select Level-3	Drop Down	Select the Level 3 item name
4	Add Fourth Level	Text box	Enter the item further specifications
5	Select Unit	Drop down	Select the unit for the item added in level 3
6	Submit	Button	By clicking the submit button, the item will be added to the budget head selected

- GRIN Entry
- Direct Grin Entry
- Clearance
- GRIN Report
- Stock Inward
- Stores Stock Entry
- Stores Stock Entry Report
- Store Issues Slip
- Stock Report
- Add Category Level-3
- Add Category Level-4
- Upload Signed GRIN
- List of GRIN

Add Category Level-4

Select Budget Head:

Select Level-3:

Select Unit:

Select Level-2:

Add Fourth Level:

Fourth Level Item List

Third Level Item	Fourth Level Item Name
ADHESIVE TAPE	BROWN CELLO TAPE 2 inches number
ADHESIVE TAPE	BROWN CELLO TAPE 3 inches number

7. RATE CONTRACT

a) RATE CONTRACT EXCEL SHEET

- **Step 1:** See the RC Upload Format from RC upload page in PDA login. Create excel sheet headings as per the format

- **Step 2:** Concatenate catalogue number with pack size and paste the same as values in **catalogNo** column. Formula used for concatenating is shown below
=Concatenate(B2, "-",D2)
- **Step 3:** Concatenate with values of cat number, pack size with item description. Paste the same as values in **itemDesc** column. Formula used for concatenating is shown below
=Concatenate(B2, "-",D2, "-",C2)

SINo	catalogNo	itemDesc	unit/packSize	HSN_CODE	unitRate	discount	taxes
1	Cat 001	ARGON GAS GRADE I HIGH PURITY 99.999% - INOX AIR PRODUCTS	Cubic Meter	28042100	950.00	0	0
2	Cat 002	ARGON +HYDROGEN MIXTURE GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28042990	1560.00	0	0
3	Cat 003	ARGON +HYDROGEN MIXTURE GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28042990	1560.00	0	0
4	Cat 004	ARGON +NITROGEN MIXTURE GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28042990	1320.00	0	0
5	Cat 005	ARGON +NITROGEN MIXTURE GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28042990	1320.00	0	0

- **Step 4:** Copy the Concatenated value and paste using paste special option -> Values

A	B	C	D	E	F
2	1 Cat 001	ARGON GAS GRADE I HIGH PURITY 99.999% - INOX AIR PRODUCTS	Cubic Meter	28042100	950
3	2 Cat 002	ARGON +HYDROGEN MIXTURE GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28042990	1560
4	3 Cat 003	ARGON +HYDROGEN MIXTURE GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28042990	1560
5	4 Cat 004	ARGON +NITROGEN MIXTURE GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28042990	1320
6	5 Cat 005	ARGON +NITROGEN MIXTURE GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28042990	1320
7	6 Cat 006	HYDROGEN GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28041000	1650
8	7 Cat 007	NITROGEN GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28043000	840
9	8 Cat 008	ZERO AIR	Cubic Meter	28042990	990
10	9 Cat 009	NITROGEN GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28112930	1850
11	10 Cat 010	OXYGEN GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28044010	1720
12	11 Cat 011	OXYGEN GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28044010	770
13	12 Cat 012	SYNTHETIC AIR	Cubic Meter	28043000	2800
14	13 Cat 013	NITROGEN GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28046900	11095
15	14 Cat 014	CARBON DIOXIDE GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28112940	13180
16	15 Cat 015	CHLORINE GAS GRADE I HIGH PURITY 99.999% (9	Cubic Meter	28011000	7380
17	16 Cat 016	SULPHUR-DI-OXIDE GAS GRADE I HIGH PURITY 99.999% (9	KG	28046900	11090
18	17 Cat 017	METHANE GAS GRADE I HIGH PURITY 99.999% (9	KG	27112100	1720
19	18 Cat 018	ETHYLENE GAS GRADE I HIGH PURITY 99.999% (9	KG	27111400	6860
20	19 Cat 019	SULPHUR HEXA FLUORIDE GAS GRADE I HIGH PURITY 99.999% (9	KG	28139090	2240

- Unit of measure is default and only number.
- Unit/Pack size character limit is limited to 25 characters.
- Rate will be so many number(s) of the pack size. Quantity entered in the indent is for that many numbers of the pack size and item description.
- Tax should be entered as percentage value (Eg. 0, 12, 18 etc).

b) CREATING VENDOR MASTER – OEM & SUPPLIER

- Create the vendor master for OEM & supplier by following the SOP for adding vendor (Pg. No: 12)

c) CREATING RATE CONTRACT

- Then after adding the Supplier and OEM details go to Create Rate Contract Page and enter the details as shown below

S. No	Field Name	Values	Suggestion
1.	From Date	DD-MM-YYYY	Choose the from date from the calendar
2.	To Date	DD-MM-YYYY	Choose the to date from the calendar
3.	Name of Manufacturer / OEM	Dropdown	Select the manufacturer/OEM name
4.	Address of Manufacturer / OEM	Text field	Address will be fetched from DB and it is a frozen field
5.	Email id of Manufacturer / OEM	Text field	It will be fetched from DB and it is an editable field
6.	Mobile / Phone number Manufacturer	Text field	
7.	Vendor GST	Text field	
8.	Name of Supplier	Drop down	Select the Supplier name
9.	Address of Supplier	Text field	Address will be fetched from DB and it is a frozen field
10.	Email id of Supplier	Text field	It will be fetched from DB and it is an editable field
11.	Mobile / Phone number Supplier	Text field	
12.	Supplier GST	Text field	
13.	CSIR Tender reference number	Text field	Enter the tender reference number
14.	CSIR Tender date	DD-MM-YYYY	Enter the tender reference date
15.	Supplier Ref/Quotation No	Text field	Enter the supplier quotation number
16.	Quotation date	DD-MM-YYYY	Enter the quotation date
17.	Submit	Button	Clicking this submit button, The RC will be created

ACCESS

EMPLOYEE
 FAO
 PDA
 PME
 SBA
 SO-PURCHASE
 SO-STORES
 SPO

GANAPATHY K.P.S
 STORES AND PURCHASE OFFICER,
 CECRI

Create PO

Print Purchase Order

Amend PO

Order Cancellation

General Conditions

Special Conditions

Create Rate Contract

Upload RC

View RC Items

Print Indent

Upload Signed PO

Add Vendor

Add Category Level-3

Create Rate Contract

From Date *	<input type="text" value="2024-07-05"/>	To Date *	<input type="text" value="2025-06-30"/>
Name of Manufacturer / OEM	<input type="text" value="SUCCESS TRADERS"/>	Name of Supplier	<input type="text" value="SUCCESS TRADERS"/>
Address of Manufacturer / OEM	<input type="text" value="NO 27 B VOC ROAD KARAIKUDI 6300K"/>	Address of Supplier	<input type="text" value="NO 27 B VOC ROAD KARAIKUDI 6300K"/>
Email id of Manufacturer / OEM *	<input type="text" value="successplygases1995@gmail.com"/>	Email id of Supplier *	<input type="text" value="successplygases1995@gmail.com"/>
Mobile / Phone number Manufacturer	<input type="text" value="9345735928"/>	Mobile / Phone number Supplier	<input type="text" value="9345735928"/>
Vendor GST *	<input type="text" value="33AEYPM3310D1ZP"/>	Supplier GST *	<input type="text" value="33AEYPM3310D1ZP"/>
CSIR Tender reference number *	<input type="text" value="2023_CSIR_154713_1"/>	Supplier Ref/Quotation No *	<input type="text" value="562661"/>
CSIR Tender date *	<input type="text" value="2023-05-19"/>	Quotation date *	<input type="text" value="2023-06-10"/>

d) UPLOAD RC

- After creating the RC next is to Upload the RC by filling the details as given below

S. No	Field Name	Values	Suggestion
1.	Vendor Name	DD-MM-YYYY	Choose the from date from calendar
2.	From Date	DD-MM-YYYY	Fetched from DB based on the vendor selection
3.	To Date	DD-MM-YYYY	
4.	Tender date	DD-MM-YYYY	
5.	Bid number	Text field	
6.	Name of Supplier	Text field	
7.	Select Budget Head	List of all consumable heads	Select the consumable budget head from the list
8.	Select Level-2	List of all consumable Sub Budget Heads / Level 2	Select the consumables sub budget head / Level 2 from the list
9.	Upload Excel files	Upload button	Upload the RC excel sheet Before uploading, ensure that there is no duplicate Catalogue Number as it will not upload and it will show error

ACCESS

EMPLOYEE
 FAO
 PDA
 PME
 SDA
 SO-PURCHASE
 SO-STORES
 SPO

GANAPATHY K.P.S
 STORES AND PURCHASE OFFICER,
 CECRI

Create PO
 Print Purchase Order
 Amend PO
 Order Cancellation
 General Conditions
 Special Conditions
 Create Rate Contract
 Upload RC
 View RC Items
 Print Indent
 Upload Signed PO
 Add Vendor
 Add Category Level-3

Upload RC

VendorName

From Date To Date

Tender date Bid number

Name of Supplier Select Budget Head:

Select Level-2 Upload Excel files

Upload only excel files

e) VIEW RC ITEMS

- After uploading the RC we can check the same in View RC items page
- This view RC item is available in employee page and also in PDA page

S. No	Field Name	Values	Suggestion
1.	Budget Code	Drop down	Choose the budget code
2.	Sub Budget Head	Drop down	Choose the sub budget head
3.	Search RC OEM Vendor	Drop down	Based on the budget code & sub budget head selected, the RC OEM vendor name will be filtered out and select the OEM vendor name from the drop down list
4.	Search based on Catalog No or Item description	Text box	Search the item by enter first 3 characters of the item or full item name



Create PO

Print Purchase Order

Amend PO

Order Cancellation

General Conditions

Special Conditions

Create Rate Contract

Upload RC

View RC Items

Print Indent

Upload Signed PO

Add Vendor

Add Category Level-3

View RC Items

Budget Code: CONTINGENCIES Sub Budget Head: PROCUREMENT OF MADI Search RC OEM Vendor: MSD PHARMACEUTICALS

Search Based On Catalog
No Or Item Description: pne

Sl.No	Cat.No	Details Of the Items	Unit of Measure	Pack Size	Unit Rate	HSN Code	Discount	Taxes
6	CECRI-Cat006	PNEUMOVAX23 PFS	Nos	PFS	1134	30024119	0	5

Sl.No	Cat.No	Details Of the Items	Unit of Measure	Pack Size	Unit Rate	HSN Code	Discount	Taxes
1	CECRI-Cat001	JANUMET 50/1000 MG Strip of 2X15 Tabs	Nos	Strip of 2X15 Tabs	394.44	30049099	0	12
2	CECRI-Cat002	JANUMET 50/500 MG Strip of 2X15 Tabs	Nos	Strip of 2X15 Tabs	394.41	30049099	0	12
3	CECRI-Cat003	JANUVIA 100MG Strip of 7 Tabs	Nos	Strip of 7 Tabs	183.65	30049099	0	12
4	CECRI-Cat004	JANUVIA 50MG Strip of 7 Tabs	Nos	Strip of 7 Tabs	177.52	30049099	0	12

8. CREATE PURCHASE ORDER FOR INR

Pre-Requisites

- ✓ Check whether vendor name is added to the database. If not added, follow the SOP for **vendor master creation (Page No.: 12)**
- ✓ Check whether the item generic name is added to the budget head and sub budget head. If not, add the same by following the SOP for **Level 3 Categorization (Page No.: 14)**

Workflow: PDA → SO (P) → SPO

Step 1: PDA creates the PO**Step 2:** SO(P) approval

- Once the PO is generated from PDA login it flows to SO(P), where SO(P) can see the list of PO under Purchase order approval page, by clicking the PO number link, the complete PO will be shown and after that by clicking action button, SO(P) can enter in the remarks and approve. If approved, then the PO will flows to SPO page. If rejected the flow ends there.

Step 3: SPO Approval

- Under Purchase order approval, same as SO(P), SPO can view the PO by clicking on the PO number. Then by clicking the action button, SPO can enter in the remarks and approve. If approved, then the PO will flows again to PDA page. If rejected the flow ends there.

Step 4: PDA

- Once SPO approves, the Purchase order, PDA can print the PO by clicking the Office copy / Print PO under Print Purchase order tab and get signed from SPO or senior most S&P officer. The signed PO should be scanned as .pdf format and uploaded under Upload Signed PO page.
- This completes the order workflow and then moves to GRIN.

S. No	Field Name	Values	Suggestion
1	Select UTN No	Drop Down	Select UTN No. for which order to be created.
2	Project Number	Fetched from indent database	
3	Indentor Name		

4	Supplier Ref/Quotation No	Text Box	Enter the ref/quotation number according to the quotation.
5	Quotation date	DD-MM-YYYY	Select the quotation date using calendar.
6	Indent Type	Fetched from indent database	
7	Category	Drop Down	Select the category based on the indent
8	Sub Category		Select the sub category based on the indent
9	Procurement Mode		Select the procurement mode according to the indent. (If necessary, this can be changed at the time of order creation depending on the mode of tendering approved by PC / TPC)
10	Purchase Order Type	Radio Button	Indigenous - For Indian Order.
11	Currency	Frozen field	For Indian Order, the currency is frozen as INR
12	Exchange Rate	Frozen field	For Indian Order, the exchange rate is frozen as "1"
13	Other Ref/Clarifications	Text Box	Enter any mail clarification if any
14	Tender ID GEM/CPPP/Manual	Text Box	Enter relevant Tender ID (Nil for other than tender)
15	Tender date	DD-MM-YYYY	Enter relevant tender date. (Not mandatory for other than tender)
16	MSE/ Non MSE, Women, SC/ST	Drop Down	Select the option after verifying the status of the vendor
17	Indent Amount	Frozen field	Fetched from indent database
18	Price Base (Price Basis)	Drop Down	Select according to the ordering terms
19	Level 3 Category	Drop Down	Select according to the item name
20	Description	Text Box	The description will be fetched from indent, detailed specification should be added. (Max Character limit is 250)
21	Unit/Pack	Drop Down	Select the unit from the drop down
22	Qty	Text Box	Enter the quantity
23	HSN Code	Text Box	Enter the HSN Code
24	Rate	Text Box	Enter the unit rate (in 2 decimal point)
25	GST rate (%)	Drop Down	Select the full GST percentage from the dropdown. (For eg., if GST 18% then it should be selected the system will take it as full IGST or 9% CGST & 9% SGST based on the lab GST No. and suppliers GST number. The first 2 digits of GST number indicates the State / UT. This can be seen in View PO & Print PO)
26	Discount (%)	Text Box	Enter the discount in percentage. (If the vendor has given lumpsum / absolute discount, then calculate the percentage)
27	Amount	Calculated display	The amount will be auto calculated and will be displayed
28	Free Item	Check Box	Check the box in the item, if the item is free of cost or leave it unchecked
29	Action	Button	Delete any line items if needed. This will be required for splitting one indent into multiple PO's
30	Overall Tax	Calculated display	The overall tax amount will be auto calculated and displayed

31	Overall Discount	Calculated display	The overall discount will be auto calculated and displayed
32	Other charges Description	Text Box	Enter other charges description(delivery, installation, transportation charges etc.,) if any
33	Other charges	Text Box	Enter the other charges total amount including GST. All types of charges can be entered as one lumpsum amount. The split up can be shown in “More Terms & Condition”
34	Delivery Date	DD-MM-YYYY	Select the delivery date from the calendar.
35	Location	Drop Down	Enter the delivery location where the item need to be dispatched
36	Amount	Calculated display	The overall total amount will be auto calculated and displayed (As of now, other charges entered in Sl. No. 33 are added here and is the sanction amount for the project. In Print PO the other charges description and values will be shown separately)

Source of Funding:

S. No	Field Name	Values	Suggestion
37	Project No	Frozen field	Fetches from Database based on indent
38	Amount	Text box	Enter the total amount. This amount should match with the amount displayed in Sl. No. 36

Additional Source of Funding, If Any:

- This comes to play when additional funds are required from one or more projects.

S. No	Field Name	Values	Suggestion
39	Project No	Drop Down	Select the appropriate additional project from drop down.
40	Amount	Text Box	Enter the additional amount needed from the selected project
41	Action	Button	Click add to enter the selected project no. and amount.

- The overall amount from one or more projects should match with Sl. No. 36. If not, the system will not allow for further steps

Vendor Details:

S. No	Field Name	Values	Suggestion
42	Vendor Name	Drop Down	Select from the vendor from the dropdown list.
43	Vendor GST	Frozen field	Fetches from the vendor database.
44	Vendor Address	Frozen field	Fetches from the vendor database.

Terms and Condition:

S. No	Field Name	Values	Suggestion
45	Terms	Display field	All terms heading are displayed and it is non-editable field
46	Conditions	Display field	All detailed conditions of the terms are displayed and it is non-editable field
47	Actions	Checkbox	Uncheck the box for removing the terms and condition in PO if not required. Based on this action the checked terms and condition will be displayed below

Special Terms and Condition:

S. No	Field Name	Values	Suggestion
48	Terms	Display field	All terms heading are displayed and it is a editable field
49	Conditions	Display field	All detailed conditions of the terms are displayed and it is a editable field
50	Actions	Checkbox	Click the checkbox after editing it. Based on this action the special terms and condition selected will be added and displayed below Note: <ul style="list-style-type: none"> As of now, once the terms are edited and the check box is clicked, you can't undo the action

More Terms and Conditions:

S. No	Field Name	Values	Suggestion
51	More Terms and Conditions	Button	If any other terms and conditions are not found in the above, then by clicking more terms and conditions button to add the terms & condition. This is applicable for this purchase order
52	Term Name	Text Box	Enter the term name (For eg. Payment, Delivery etc)
53	Term Details	Text Box	Enter the term details as per the term name given above. (For eg. Payment: 100% after delivery & installation – For Payment term)

Any further PO's to be created?

S. No	Field Name	Values	Suggestion
54	Any further PO's to be created?	Radio Button	Click "Yes" if any PO needs to be created further. Click "No" if PO is not needed further.
55	Submit	Button	By clicking the submit button, PO will get created. PO number will be in the format <i>Lab_name/FY/Procurement_mode/Indent_type/Auto generated number</i>

9. GRIN - Goods Receipt and Inspection Note



Step 1: SDA creates the GRIN

- After generating the GRIN, printout of the GRIN report has to be taken.

Step 2: SO Approval

- After GRIN is generated by SDA, it will be moved to SO(S) page under Approve GRIN, where SO(S) can see the GRIN by clicking the GRIN number after that by clicking action button, SO(S) can enter in the remarks and click approve / reject button. Once the GRIN is approved then it flows to IO, but if it gets rejected, then the status will be shown as rejected
- GRIN printout should be sent for signature to IO & PL in offline mode in addition to the approval through ACCESS Software.

Step 3: IO Approval

- In IO's employee column, under GRIN Acceptance by Indentor, list of GRIN will be shown, where IO can select the GRIN and enter the accepted quantity against the received quantity for each items and remarks, then click approve button. Once the IO approves, then it flows to PL but if it gets rejected, then the status will be shown as rejected

Step 4: PL approval

- In PL's employee column, under GRIN Acceptance by PL, list of GRIN will be shown, where PL can select the GRIN and view the received & accepted quantity and then enter the remarks, click approve button. Once the PL approves, then it flows to SDA, but if it gets rejected, then the status will be shown as rejected

Step 5: SDA upload signed GRIN

- The final signed GRIN should be scanned as .pdf file and upload the same in "Upload Signed GRIN" page under SDA login. After uploading the document, enter the remarks and click the approve button.

This completes the GRIN workflow and it moves to stock entry workflow

Pre-Requisites

- Scanned copy (.pdf) of invoices / delivery challan
- Level 3 Checking:
 - Check whether the item is added in Level 3, if not add the item in concerned budget heads by **following the SOP (Pg. No. 14)**
- Vendor Name Checking:
 - Check whether vendor name is added in the database by clicking on "Add Vendor" page. If the vendor name is not there then add the same by **following the SOP (Pg. No. 12)**

a) GRIN Entry for Without PO - YES

S. No	Field Name	Values	Suggestion
1.	Without PO	Radio button (YES / NO)	Select Yes for Direct Purchase indents
2.	Indent No	Dropdown	Select the indent number
3.	Order No	Dropdown	Since it is direct purchase, Order number is an empty frozen field
4.	Category	Frozen field	Fetched from Database
5.	Budget head as per Purchase order		
6.	Cash Code		
7.	Indentor		
8.	Project No		
9.	Booking Code		
10.	Consigner	Dropdown	Select the consigner's name

11.	Direct Issue	Dropdown (Yes / No)	Select Yes / No. If NO is selected, it will be added to inventory / general stock on acceptances of GRIN. Care should be taken in selection of YES/NO.
12.	Transport Mode	Dropdown (Road / Rail / Air / Sea / Courier / In person / Others)	Select the transport mode
13.	Invoice No	Text box – Alphanumeric field	Enter the invoice number
14.	Invoice date	DD-MM-YYYY	Enter the invoice date
15.	Invoice Amount	Calculated display	The invoice amount will be auto-calculated from the item rate, discount and tax and will be displayed
16.	Delivery Note No	Text box – Alphanumeric field	Enter the delivery note number
17.	Delivery Note date	DD-MM-YYYY	Enter the delivery note date
18.	Delivery At	Dropdown	Select the lab name / lab sub unit name
19.	Currency	Frozen field	INR as default currency
20.	Indent Type		Fetches from indent database
21.	Other Charges	Text box	Enter other charges if any
22.	Upload	Upload button	Upload the invoices in .pdf format
23.	UTN No	Pop-Up link	By clicking the UTN No link, the pop-up of indent screen will be shown
24.	Level 3 Category	Dropdown	Select the level 3 category for the item
25.	Description	Text box	Item name is auto fetched from the indent page, and it can also be edited.
26.	Qty Ord	Frozen field	Auto fetched from indent database
27.	Qty Rec	Text box	Enter the quantity received against the indent
28.	HSN Code	Text box	Enter the HSN code (Min 4 digits)
29.	Unit	Frozen field	Auto fetched from indent database
30.	Rate	Text box	Enter the unit rate
31.	CGST In %	Text box	Enter the CGST percentage (eg. 0, 5, 12, 18 etc)
32.	SGST In %	Text box	Enter the SGST percentage (eg. 0, 5, 12, 18 etc)
33.	IGST In %	Text box	Enter the IGST percentage (eg. 0, 5, 12, 18 etc)
34.	Discount	Text box	Enter the discount value. It should be an absolute value not as percentage
35.	Free Item	Check box	If the item is a free item, then click the checkbox, if not leave it unchecked
36.	Noble Metals	Check box	If the item is a noble metals, then click the checkbox, if not leave it unchecked
37.	Amount	Calculated field	The Amount is an auto calculated frozen field
38.	Action	Button	If any line items are not needed, then that line items can be deleted using this delete

			button. This will be required for part delivery
39.	Submit	Button	Clicking this submit button, GRIN will be generated The GRIN number will be in the format as given below <i>Lab_Name/GRIN/FY/Date/Auto number</i>

b) GRIN Entry for Without PO – NO

S. No	Field Name	Values	Suggestion
1.	Without PO	Radio button (YES / NO)	Select NO for all other procurement mode other than direct purchase indents
2.	Indent No	Dropdown	Select the indent number
3.	Order No	Dropdown	Select the order number from the list. For one indent multiple POs can be created and hence while selecting the drop down care must be taken
4.	Category	Frozen field	Fetched from Database
5.	Budget head as per Purchase order		
6.	Cash Code		
7.	Indenter		
8.	Project No		
9.	Booking Code		
10.	Consigner	Dropdown	Select the consigner's name
11.	Direct Issue	Dropdown (Yes / No)	Select Yes / No. If NO is selected, it will be added to inventory / general stock on acceptances of GRIN. Care should be taken in selection of YES/NO.
12.	Transport Mode	Dropdown (Road / Rail / Air / Sea / Courier / In person / Others)	Select the transport mode
13.	Invoice No	Text box – Alphanumeric field	Enter the invoice number
14.	Invoice date	DD-MM-YYYY	Enter the invoice date
15.	Invoice Amount	Calculated display	The invoice amount will be auto-calculated from the item rate, discount and tax and will be displayed
16.	Delivery Note No	Text box – Alphanumeric field	Enter the delivery note number
17.	Delivery Note date	DD-MM-YYYY	Enter the delivery note date
18.	Delivery At	Dropdown	Select the lab name / lab sub unit name
19.	Currency	Frozen field	Currency is fetched from PO
20.	Indent Type		Fetched from indent database
21.	Other Charges	Text box	Enter other charges if any
22.	Upload	Upload button	Upload the invoices certified by IO in .pdf format

23.	UTN No	Pop-Up link	By clicking the UTN No link, the pop-up of indent screen will be shown
24.	PO No	Pop-Up link	By clicking the PO No link, the pop-up of Purchase order screen will be shown
25.	Level 3 Category	Dropdown	Select the level 3 category for the item
26.	Description	Text box	Item name is auto fetched from the indent page, and it can also be edited
27.	Qty Ord	Frozen field	Auto fetched from purchase order database
28.	Qty Rec	Text box	Enter the quantity received against the purchase order. In case any item is not received at all, that item need to be deleted instead of putting qty as zero (0).
29.	HSN Code	Frozen field	Fetched from Purchase order
30.	Unit		
31.	Rate		
32.	CGST In %		
33.	SGST In %		
34.	IGST In %		
35.	Discount		
36.	Free Item	Check box	If the item is a free item, then click the checkbox, if not leave it unchecked
37.	Noble Metals	Check box	If the item is a noble metals, then click the checkbox, if not leave it unchecked
38.	Amount	Calculated field	The Amount is an auto calculated frozen field
39.	Action	Button	If any line items are not needed, then that line items can be deleted using this delete button. This will be required for part delivery
40.	Submit	Button	Clicking this submit button, GRIN will be generated The GRIN number will be in the format as given below Lab Name/GRIN/FY/Date/Auto number

Note:

If GRIN is already entered for the selected Indent No. / Order No., then it is shown below submit button.



GRIN Data For Selected Purchase Order

SI No	GRIN Number	GRIN Prepared By	Prepared Date
1	CECRI/GRIN/2024-2025/25072024/41	10500 [REDACTED]	25-07-2024

By clicking the GRIN Number, Pop-up of previous entered GRIN will be shown