



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



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

ONLINE TRAINING – STORES DEPARTMENT

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TEAM S&P CSIR

AGENDA

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S. NO.	TOPICS
1	ADD VENDOR
2	ADD LEVEL 3
3	ADD CATEGORY LEVEL-4
4	SDA DASHBOARD & OTHER RESPONSIBILITIES
5	GRIN / DIRECT GRIN ENTRY WORKFLOW
6	GRIN ENTRY
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8	SO(S) DASHBOARD
9	GRIN APPROVAL BY IO & PL
10	CLEARANCE
11	STOCK ENTRY
12	REPORTS AND REGISTERS FOR STORES

ADD VENDOR

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INDIAN VENDOR

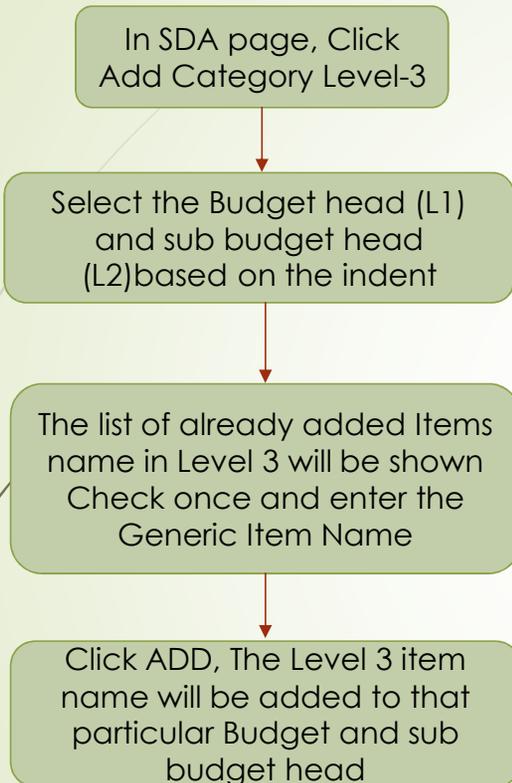
1. Click ADD VENDOR for adding a new vendor or viewing the vendor DB
2. Type the vendor Name and press tab, if the vendor is already there, It will show the details. Using this we can also edit the vendor master.
3. If Vendor name is not exist, then type the details asked in the form.
 - Vendor Name,
 - Address,
 - Country (INDIA),
 - Vendor GST No,
 - Email Id
 - Bank details (Account No, Branch name etc.,)
4. Then by clicking SAVE Button, the vendor details will be added

FOREIGN VENDOR

1. Click ADD VENDOR for adding a new vendor or viewing the vendor DB
2. Type the vendor Name and press tab, if the vendor is already there, It will show the details. Using this we can also edit the vendor master.
3. If Vendor name is not exist, then type the details asked in the form.
 - Vendor Name,
 - Address,
 - Country (OTHER THAN INDIA),
 - Email Id
 - Bank details (SWIFT Code, Routing Number, Foreign Bank Name & Address etc.,)
4. Then by clicking SAVE Button, the vendor details will be added

Since Draft mode is currently under process. So, kindly make sure all the information are available before starting the GRIN / DIRECT GRIN work

ADD LEVEL 3



Example for a Capital item Indent

Air purification system 150m3 & 300m3 with accessories

1. Budget head (Level 1)

Capital Expenditure

2. Select Level-2

Apparatus & Equipment

3. Add Third Level

Air purification system

Example for a Consumable Indent

ALF-B21316-22 - 100g - 1,4-Diaminobutane, 98+%

1. Budget head (Level 1)

Chemicals / Consumables

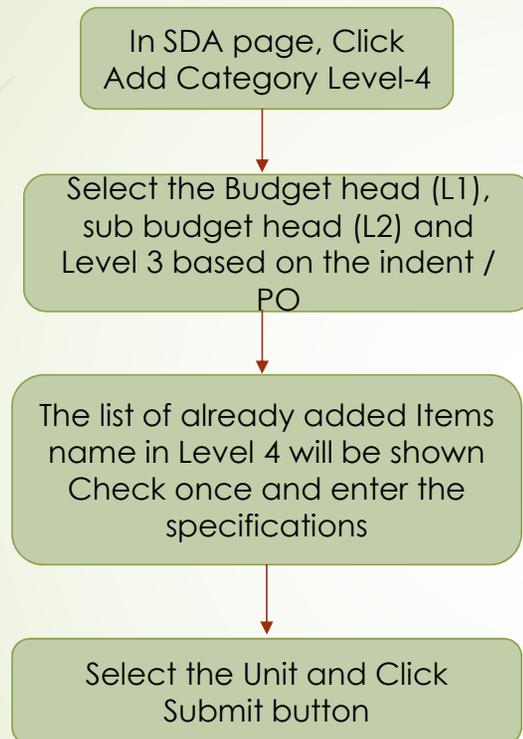
2. Select Level-2

Chemicals

3. Add Third Level

1,4-Diaminobutane

ADD CATEGORY LEVEL-4



Example for a Consumable Indent

1. Budget head (Level 1)

Contingencies

2. Level - 2

Printing, Stationery & Binding

3. Level - 3

Photo Copier Paper

4. Level - 4

A3 80 GSM white REAM

A4 80 GSM white REAM

Level 4 categorization is required for replenishment items during Stock entry

SDA DASHBOARD & OTHER RESPONSIBILITIES

SDA DASHBOARD

1. GRIN Entry
2. Direct GRIN Entry
3. Clearance Voucher
4. Stores Stock Entry
5. Stores Stock Entry Report
6. Add Vendor
7. Add Category Level 3
8. Add Category Level 4
9. Upload Signed GRIN
10. List of GRIN
11. Registers and Reports
12. Indent Search
 - ❑ Where the indent can be searched by entering the UTN number

OTHER SDA RESPONSIBILITIES

- Add Vendor & Level 3 before starting the GRIN Entry
- After SO(S) approval, Take GRIN report printout and send it to IO & PL for Signature (OFFLINE).
- They need to clear both ONLINE & OFFLINE APPROVAL
- Then upload the signed GRIN report as a single pdf document
- After uploading, it flows to Stock entry

GRIN / DIRECT GRIN ENTRY WORKFLOW



As of now GRIN Rejection / Send back option NOT AVAILABLE

GRIN ENTRY

WITHOUT PO - YES

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- Select the Indent No based on this, category, budget head, indenter and project details etc., will be fetched
- Select Consigner name
- Select Direct issues, Transport mode
- Enter the Invoice and Delivery note details
- Since it is a direct purchase, currency will be frozen as INR
- Enter other charges (if any)
- Upload the Delivery challan / Invoice as a single pdf document
- Click YES / NO for - If any further GRIN to be created?
 - Yes NO is clicked, the UTN No. will disappear from the Dropdown
- Select the Level 3, Enter the received Qty, rate, GST, free item, etc.,
- Then click submit. It moves to SO(\$) page
- If there are any previous GRIN available then it will be shown below

NOTE:

1. **Add vendor & Level 3 before starting the GRIN Entry**
2. **Scan the Delivery challan / Invoice as a single pdf document**

WITHOUT PO - NO

- Select the Indent No & Order number, based on this category, budget head, indenter and project details, Consigner name, Currency etc., will be fetched
- Select Direct issues, Transport mode
- Enter the Invoice and Delivery note details
- Enter other charges (if any)
- Upload the Delivery challan / Invoice (as a single pdf document)
- Click YES / NO for - If any further GRIN to be created?
 - Yes NO is clicked, the Order No. will disappear from the Dropdown
- Check whether Level 3 & Item description are correctly entered.
- Enter the received Qty and we can delete the items which was not in the invoice / DC
- Then click submit. It moves to SO(\$) page
- If there are any previous GRIN available then it will be shown below

NOTE:

1. **Check Level 3 added by PDA before starting the GRIN Entry**
2. **Scan the Delivery challan / Invoice as a single pdf document**

DIRECT GRIN ENTRY

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- Enter the Indent No, Order No (If any), Project No, Indent Type, category, budget head, etc.,
- Select Consigner name (Check whether vendor details are added) & Indentor Name
- Select Direct issues, Transport model, Currency
- Enter the Invoice and Delivery note details
- Since it is a direct purchase, currency will be frozen as INR
- Enter other charges (if any) & Size and dimension of package
- Select the Level 3, Enter the Description, Qty ordered, received, rate, GST, Discount, HSN Code, free item, etc.,
- Then click submit. It moves to SO(S) page

NOTE:

1. Add vendor & Level 3 before starting the GRIN Entry
2. Scan the Delivery challan / Invoice as a single pdf document (NOT AVAILABLE AS OF NOW)

SO (S) DASHBOARD

► Under SO (S) Dashboard

✓ **IN-TRAY**

1. Approve GRIN
2. Approve STOCK
3. Approve CLEARANCE

- The list of GRINs, Stock Entry & Clearance which requires approval will be listed out
- SO (S) can view the GRINs / Stock Entry / Clearance by clicking the hyperlink
- Then by clicking Approve button, enter the remarks

✓ **Dashboard**

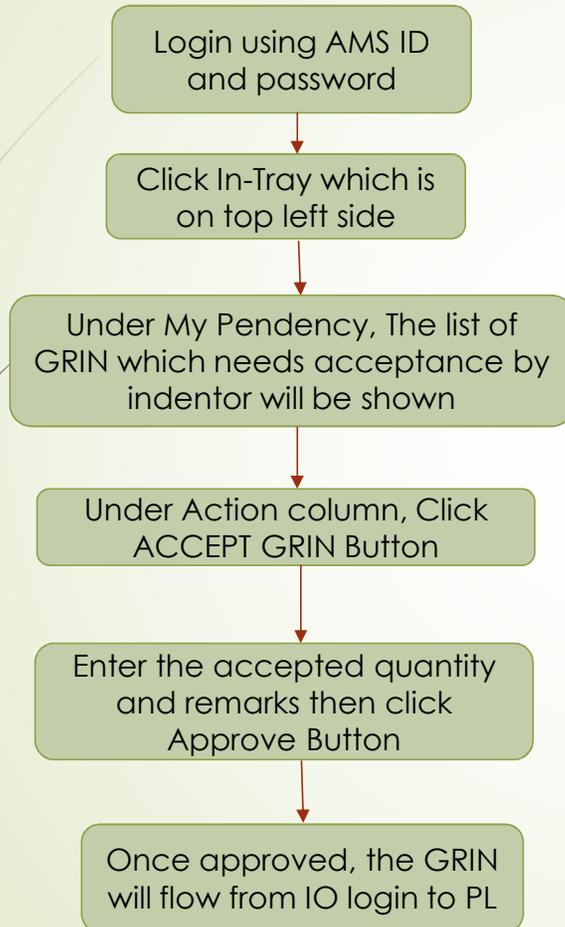
- By selecting the FROM and TO date, SO(P) can view the status of Indent, PO, GRIN and Stock Entry created for their labs

✓ **Indent search**

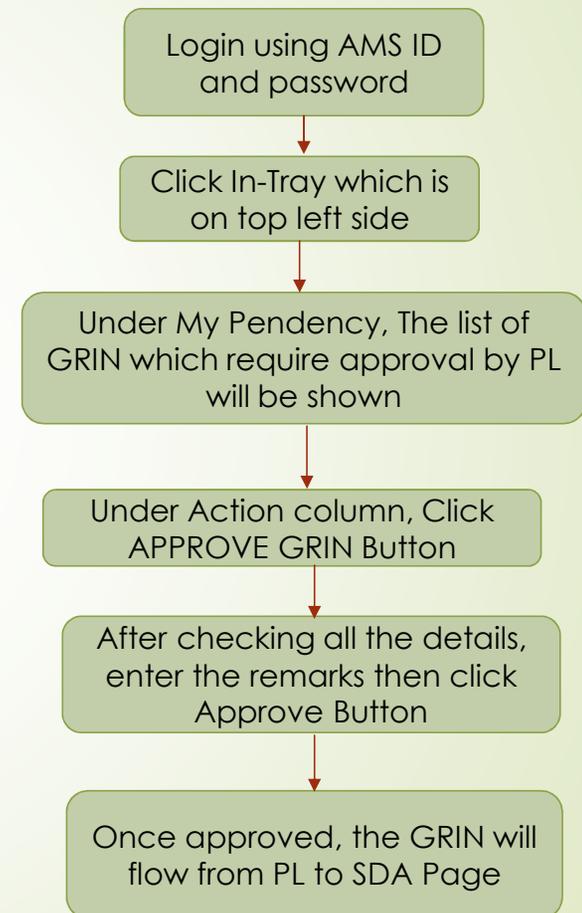
UNDER EMPLOYEE ROLE FOR GRIN APPROVAL

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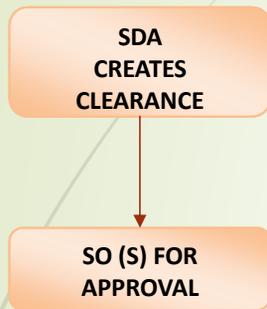
GRIN APPROVAL BY IO



GRIN APPROVAL BY PL



CLEARANCE



Pre Requisites:

- GRIN entry is must

- Select the UTN No, PO No & GRIN No based on this No of Packages, Weight & Dimension will be fetched from DB
- Select the Mode of Arrival of Items, Service Provider Name & Charge type
- Enter all the details as per the invoice
- Upload the Clearance document as a single pdf
- Enter the Bill No, Date, Charge Description, HSN Code, Amount, GST and then click add
- After adding all the charges as per the invoice, Click Submit button
- This flows to SO (S) for approval
- Indent, PO, GRIN & Signed GRIN can be seen using the Hyperlink given
- All petty expenses like local coolie charges, Crane charge, Custom Clearance, Carrier, etc., can be entered here.

STOCK ENTRY

SDA
CREATES STOCK
ENTRY

SO (S) FOR
APPROVAL

Pre Requisites:

- Upload signed GRIN entry is must

- ❖ Check whether **Level 4 is added for replenishment items**
- ❖ By **Selecting the GRIN No.** all the data entered in GRIN will be fetched
- ❖ Check all the details and If **any changes it can also be edited**
- ❖ Any Number of clearance voucher entered for the GRIN will flow to stock entry as Clearance charges
- ❖ Click **YES / NO for Any further STOCK To be created?**
 - Yes NO is clicked, the GRIN number will disappear from the Dropdown
- ❖ In case of replenishment items, then Level 4 needs to be selected, for remaining items it will **be frozen as “Direct Purchase”**
- ❖ System will calculate the unit cost for each quantity of line items.
- ❖ In case of consumables
 - **Batch No**
 - **Manufacturer Date**
 - **Expiry date**
- ❖ In case of capital
 - **Date of Installation**
 - **Date of Acceptance**
 - **Warranty Period**
 - **Add specs**
 - **Make Model & Serial No**
- ❖ Then **Grand Total & Total In Forex (Item Cost + Other Charges)** will be displayed
- ❖ If any **Fund Appropriation** is there, it can also be entered
- ❖ Then click Submit, it flows to SO (S)

REPORTS AND REGISTERS FOR STORES

1. GRIN Register
2. GRIN Report
3. Clearance Report
4. GRIN Abridged Report
5. Stock Register Report
6. Clearance Register Report
7. Budget Head Register Report
8. Discrepancy Register Report

