ABACUS

YOUR TRANSFORMATION PARTNER

PUBLIC PROCUREMENT REGULATORY AUTHORITY (PPRA)

e-Pak Acquisition and Disposal System

(e-PADS)

Training Manual (For Master Trainers)

Public Procurement Regulatory Authority

Version 2.4

September 7, 2022

TABLE OF CONTENTS

Term	Description
2FA	Two Factor Authentication
ADP	Annual Development Programmed
AES	Advanced Encryption Standard
AGPR	Accountant General Pakistan Revenues
AJ&K PPRA	Azad Jammu & Kashmir Public Procurement Regulatory Authority
API	Application Programming Interface
BPPRA	Baluchistan Public Procurement Regulatory Authority
CI/CD	Continuous Integration / Continuous Delivery
CSRF	Cross-Site Request Forgery
DD	Deputy Director
DDOS	Distributed Denial of Service
DFD	Data Flow Diagram
DevOps	Development And Operations
DRAP	Drug Regulatory Authority of Pakistan
EPADS	E-Pak Acquisition & Disposal System
FATA	Federally Administered Tribal Areas
FBR	Federal Board of Revenue
FPPRA	Federal Public Procurement Regulatory Authority
GIF	Graphics Interchange Format
GUI	Graphical User Interface
HEC	Higher Education Commission
HTTPS	Hypertext Transfer Protocol Secure
KP	Khyber Pakhtunkhwa
KPPRA	Khyber Pakhtunkhwa Public Procurement Regulatory Authority
JPG	Joint Photographic Experts Group
MIS	Management Information System
MOM	Minutes Of Meetings
MQ	Messaging Queue
NTP	Network Time Protocol
NTN	National Tax Number
NADRA	National Database And Registration Authority
OCR	Optical Character Recognition
OTP	One-Time Password
PDF	Portable Document Format
PHE	Public Health Engineering
P&DD	Planning And Development Department
PPT	PowerPoint presentation
PPRA	Public Procurement Regulatory Authority
QA	Quality Assurance
Rs.	Rupees
SBP	State Bank of Pakistan
SECP	Securities And Exchange Commission of Pakistan
SIEM	Security Information And Event Management

Term	Description
SPPRA	Sindh Public Procurement Regulatory Authority
SRS	Software Requirement Specification
STN	Switched Telephone Network
SSL	Secure Sockets Layer
SQL	Structured Query Language
TLS	Transport Layer Security
VM	Virtual Machine
WSO2	Web Services Oxygenated
WAF	Web Application Firewall
PA	Procurement Agency
SME	Escalation to subject Matter
IVR	Interactive Voice Response
ETS	Electronic Tendering Services
XSS	Cross-Site Scripting
OU	Organization unit is one component of organization hierarchy. Like FPPRA, MoIT, MoNHSR&C, PIMS are all Organization units.

AMENDMENT HISTORY

Version	Date	Updated by	Remarks
1.0	July 7, 2022	Anib Aslam	Template Creation
2.0	July 26, 2022	Anib Aslam	Updated Manual
2.1	August 24, 2022	Omer Naeem	Updated User Management Section
2.2	August 26, 2022	Anib Aslam	Updated Content
2.3	August 29, 2022	Qasim Syed	Technical Review
2.4	September 6, 2022	Anib Aslam	Updated Content

DISTRIBUTION

Name	Position
PPRA Team	
Mr. Maqbool Ahmad Gondal	Managing Director
Engr. Muhammad Zubair	Executive Director
Mr. M.Tariq Javed Khan	Project Manager
Mr. Rizwan Mehmood	Director MIS
Ms. Ayesha	Assistant PPRA
Ms. Warda Rizwan	Principle Business Analyst
Abacus Team	
Mr. Naveed Hussain	Project Director
Mr. Ijaz Haider Malik	Project Manager
Mr. Asif Ghouri	Solution Architect
Mr. Abdul Mannan Nasir	Senior Technical Lead
Mr. Qasim Syed	Senior Business Analyst

ASSOCIATED DOCUMENTS

Sr. No.	Document Name
1.	

Assumptions

This training manual assumes that you already have e-Pak Acquisition and Disposal System User account as per your Geographical / Ministerial / Departmental / Organizational level and role. This manual also assumes that you are familiar with basic web-application account login procedures.

Trainer's Qualification Requirements

1. Public Procurement Domain Expertise.
2. Must Be BS-19 or Equivalent Official.
3. Good Communication Skills.
4. Good Computer and Software operations skill.

Pre-Requisites for Training

1. Multimedia Projector.
2. Availability of Whiteboard / Flipcharts for Trainers.
3. Stationary for Trainees (Notepad, Pencils/Pens, Highlighters etc.)
4. Attendance Sheet for Participants for proof of participation.
5. Availability of Desktops / Laptops for hands on training.
6. Stable Internet Connectivity for Trainees. Internet should be fast enough to accommodate all Trainees.
7. Training Hall should be clear and visible from all sides and plenty of space to move around.
8. Training Hall should have round tables to group participants for group activities.

Pre-Requisites for Pre-Test

1. The Trainer shall give an introduction to the participants regarding the training.
2. The Trainer will take manual attendance of all participants before beginning the session.
3. The Trainer will take a pre-test to evaluate existing knowledge of the participants.

Pre-Requisites for Post-Test

1. After the trainer has delivered his/her training session he/she will conduct a post-test to evaluate participants' overall knowledge.
2. The trainer will provide training feedback forms to the participants for trainer's own evaluation.
3. The trainer will submit attendance sheets to the participant's procuring agency.
4. The trainer will develop a training evaluation result based on pre and post tests conducted.

System Requirements

The e-Pak Acquisition and Disposal System is accessible from any Desktop PC, Mac, or Linux computer with Internet access and a supported Web-browser.

Browser Support

The following browsers and later versions fully support e-PADS standard view:

1. Mozilla Firefox (Windows, Mac, Linux)
2. Google Chrome (Windows, Mac, Linux)
3. Netscape (Windows, Mac, Linux)
4. Safari (Mac)
5. Internet Explorer 9 and above (Windows)

e-PADS Overview

1

On e-Pak Acquisition and Disposal System

This *Trainer's Manual* provides step-by-step instructions for getting started with the e-Pak Acquisition and Disposal System (e-PADS). It provides guidelines on application features and how to use the user management module. This user manual is organized according to the logical flow of e-PADS features and describes tasks in the same order users can perform while using the system.

Before You Begin…
It is recommended to have a working internet connection for web-access to the e-PADS web portal in order to use it side-by-side when reading this manual.

Introduction to e-PADS

Governmental agencies all around the world have been using information technology (IT) and the internet to access and deliver government services electronically for several years. These activities are referred to as "e-government efforts." Delivering electronic procurement to increase transparency, provide an open market for procurement needs, and promote the adoption of procurement reforms to better manage and monitor public procurement activities is one of many governments' more effective and practical approaches. With the advent of computerized procurement systems, a variety of new alternatives and techniques for assisting the procurement procedures of governments for embracing the potential savings and efficiencies. The term "electronic government procurement (e-GP)" is frequently used to describe these electronic systems.

The Government along with World Bank envisaged and conceived revolutionary digitization of the public procurement processes. For this purpose, PPRA initiated "Designing, Development, Installation and Commissioning of e-Procurement System (e-Pak Acquisition and Disposal System)". Through the development of such an effective system, PPRA intends to fully automate the public procurement processes in Pakistan, by reducing human intervention to the maximum extent possible. The system will encompass a complete procurement cycle, from procurement planning to the close of the contract. The key features of the e-Procurement (e-Pak Acquisition and Disposal) System encompass e-Procurement Planning, e-Purchasing, Encrypted Tender Submission System, e-Evaluation Matrix System, Grievance Redressal System, e-Contract Award System, e-Catalogue Management, Supplier Relationship Management, and effective Contract Management System. One of the essential outcomes of the System will be effective Regulatory Monitoring & Evaluation, resulting in effective regulatory compliance and helping to combat corrupt practices in public procurement. Abacus Consulting will implement and deploy the project in line with best practices and international standards and as per contractual obligations.
Following are the key objectives of this assignment:

1. To implement state-of-the-art customized solution as a key enabler to automate complete procurement cycle

2. To deploy a robust, advance, and futuristic e-Procurement System
3. To improve governance and institutional capacity of PPRA's and procuring agencies
4. To serve as ICT backbone and a driving force for e-governance initiatives in Pakistan
5. To automate and integrate procurement processes as well as to enhance transparent spending and cost-effectiveness along with efficiency in public procurement
6. To eliminate paperwork and repetitious administrative procedures through computerization
7. To adequately change organizational culture by encouraging technological vanguard
8. To strengthen, monitor and oversee capacity of procurement regulatory authorities
9. To set-up procurement data management and information system
10. To ensure robustness of internal and external procurement controls
11. To facilitate capacity building of procurement staff
12. To increase effectiveness of grievance redressal for thorough automation
13. To harmonize, improve and update laws, rules and procedures and make use of technology facilitating transparency, efficiency, impartiality, and competition
14. To reduce costs by preventing duplicate spending through computerized standardized buying
15. To increase transaction speed by electronic handling of tasks that support and simplify the purchasing processes
16. To reduce errors and redundancy through electronically streamlined correspondence

All public procurement and disposal activities shall be processed through standard entries in e-PADS ensuring compliance with the principles of public procurement and implementing PPRA regulatory framework.

BENEFITS

Governments and public sector agencies that have implemented e-GP systems have reported several key benefits, including

i. enhanced transparency achieved from online publication of tender notices, contract award notices, and online bid submission.
ii. increased bidder participation due to better awareness and access to opportunities.
iii. savings on procurement spend from lower bid prices due to better and open competition (savings of 10% are typically reported).
iv. enhanced reporting and procurement analytics to better monitor procurement activities.
v. faster processing of procurement activities resulting from online workflow.
vi. enhanced tools to address fraud and corruption; and
vii. reduction in printing, distribution, and storage of paper documents.

LIST OF KEY MODULES E-PADS WAVE-I

The key modules of the e-PADS Wave-I encompass.

1. Web Portal
2. User Management
3. Supplier Registration
4. Procurement Planning and Activities
5. Committee Management
6. e-Tendering / Bidding
7. e-Evaluation
8. Contract Award

9. Workflow
10. Task Management
11. Configuration Management (CMS)
12. Reports & Dashboards
13. Alerts and Notifications

Purpose of Training

The purpose of this training is to provide participants with a clear understanding of effective public procurement and the procurement process following the use of the User Management, Supplier Registration and the Procurement Plan in line with e-PADS.

Learning Outcomes

By the end of this training session users will be able to:

1. Describe the Principles of effective Public Procurement.
2. Create and Maintain Organization Entities like PPRA, Ministries, Departments, Sub Departments, etc.
3. Create and Maintain User Roles and Groups
4. Create and Maintain Users (Password Change, Password Reset, Approve User, etc)
5. Merge and Split Ministries / Departments
6. Manage Supplier and Joint Venture Registration Requests.
7. Manage Backlisting of Suppliers.
8. Supplier's Registration Process.
9. Create Procurement Plans.

Overview of Training Modules for this Session

- Module One: Understanding the Procurement Environment
- Module Two: User Management
- Module Three: Supplier
- Module Four: Procurement Plan

INTRODUCTION TO TRAINING

2

On e-Pak Acquisition and Disposal System

PROCUREMENT BACKGROUND

Procurement is a vital support function of public service. Effective and proficient delivery of public goods and services by the core departments of public procurement agencies depends to a large extent on the effectiveness and efficiencies of the procurement function. Therefore, strengthening public procurement systems within Procuring Agencies is expected to contribute to improved governance and service delivery.

The preparation of procurement guidelines for Public Procurement Agencies has come in response to an assessment of the existing procurement practices and systems already in place within the public sector. The assessment identified weak legal and institutional frameworks, absence of clear guidelines for staff, unclear internal organizational structures for procurement, lack of job descriptions for procurement staff and, low transparency and accountability in the procurement process as being among the issues affecting the procurement function within the Public Procurement Sector.

In addition, the existence of inadequately trained staff members has led to a failure in employing good practices in procurement, creating inefficiencies and loss of monetary value. A general lack of understanding of the procedures or non-compliance has further created opportunities for corruption and inefficient use of public funds. The uneconomical use of funds can arise due to problems across the entire procurement process – from poor procurement planning to a lack of transparency and competition in the announcement process, bidding, evaluating, and awarding contracts, to poor contract supervision. Effective procurement guidelines and step-by-step procedures are required to assist the Public Procurement Sector staff involved in the procurement process to enable them to perform their duties effectively and efficiently.

TRAINING MANUAL DESIGN

This manual has been prepared based on best practices in public procurement alongside current developments to assist Procuring Agencies and to help them improve their procurement systems. Following the preparation of procurement guidelines, a set of training manuals have been developed for use in the training of Procuring Agencies and other private entities dealing with procurement on a day-to-day basis. The training manuals consist of two parts: the users' manual and the trainers' manual. The trainers' manual is designed to guide those who will facilitate training to conduct the training sessions.

PURPOSE AND USE OF TRAINER MANUAL

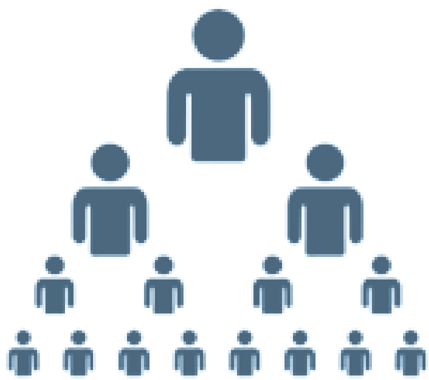
This manual has been specifically developed for the use of trainers who will be providing capacity building support in procurement to the system users of the Public Procurement Regulatory Authority of Government of Pakistan.

The various activities to be performed by the trainer and the participants are spelt out together with their respective timings. The course is participatory and as such, trainers will be required to allocate ample time for discussions, exercises, etc.
A separate manual containing brief notes has been produced under the same title but, with the label, "Users'/Trainees' manual". The trainer will refer to the Users'/Trainees' manual for specific content.
This manual contains group and individual exercises, case studies and illustrations. It is intended that the trainers will use these materials in a manner that optimally delivers the course objectives.

TRAINING STRATEGY

Effective training of staff plays a major role in reaching and sustaining procurement goals. This Trainers' Manual has been strategically designed to ensure the most efficient and effective way of providing initial and continuous training to users of procurement systems.
Trainers will be incorporating the Cascade Training Strategy, a strategy employed in conducting training aimed at change, implemented widely in many types of organizations and used extensively in the public sector domain.
Cascade training, also referred to as 'pyramid training', 'training the trainers' or 'training for trainers', is a form of central training provided by a master trainer to trainees. These trainees then act as trainers and pass the content of the training course onto others, usually in another training session. This knowledge transfer model may be carried on for several cascade layers; the fundamental idea is to train a large number of people, in a relatively short time in a cost-effective manner, as trainees become trainers in their own regions.
Due to its myriad benefits, a Cascade Training Strategy is attractive to planners of change on a large scale. For example:

a) The use of small groups enables fully participative competency training;
b) It requires few logistical and central organizational resources;
c) It does not require staff to take long periods out of service and uses organization's existing staff as co-trainers;
d) It can train a large number of people in a relatively short period;
e) It is empowering and capacity-building in delivering transportable training skills to a large group of people at each level.



TRAINING METHODS

Given the proposed structure of the course, it is of paramount importance that the trainer(s) who design and deliver this course are assisted by a group of trained facilitators who would help save time and aid in the learning process.

THE ROLE OF THE TRAINERS

- To create a pleasant and positive learning environment in which the trainees feel that they are the protagonists.
- To actively involve trainees as much as possible, including engaging with shy participants.
- To devise individualized teaching and learning strategies which allow tailor-made training for each and every attendee.
- To use a wide variety of interactive, practice-oriented, and experiential methods and techniques.
- To foster and enhance teamwork.
- To enable trainees to cope effectively with real-life situations.
- To awaken the full potential of each and every trainee.
- To give well-focused and constructive feedback, allowing for an immediate reaction.
- To boost trainees' motivation by way of internal stimuli (for example, desire for increased job satisfaction, self-esteem).

This manual is modeled around these aspirational tasks. In addition, this manual distinguishes between the role of the trainer and the role of the facilitator. The trainer should be an expert in the subject of public procurement, and possess the relevant experience, skills, and knowledge to allow for learning and knowledge transfer. **It is usually the trainer who designs the training, sets objectives, and plans activities and individual sessions**. Please refer to the forthcoming section for more information about the role of facilitators.

THE ROLE OF THE FACILITATORS

Paramount to the success of the course to be delivered to trainee users will be the availability of well-briefed and appropriately trained facilitators. As something in the order of 80 per cent of the course will be delivered in small breakout groups, the role of the facilitator in forming, leading and nurturing small group activities will be crucial. The amount of time required to train and prepare the facilitators for each course will depend upon their existing level of skill and/or experience. A half day working with the lead trainer in advance of the course should be ample preparation, so long as the lead trainer provides the facilitators with all the case studies and exercises, together with model answers prior to this briefing session.

For small group work to be effective, there should be sufficient numbers in the group to generate lively dialogue, but not so many that participation becomes restrictive. In this manual it is recommended that the optimum number for an effective small group be six (plus the facilitator).
When drawing up the groups, care should be taken by the lead trainer, in consultation with the identified facilitators, to ensure a good mix of age, gender, experience and where appropriate, ethnicity. Although different groups can be set up for each day of the course, our experience suggests that training works best when the group remains the same as this facilitates group bonding, and the development of mutual trust, friendship and camaraderie.
The following checklist offers tips and suggestions for facilitators:

- Create a safe environment where people feel comfortable to share their views and treat everyone respectfully.
- Clarify learning outcomes, check if all participants have read the case studies (in order to have some point of departure).
- Communicate a sense of enthusiasm and interest in the subject matter.
- Ask open questions (as opposed to leading or suggestive questions) and relevant follow-up questions.
- Be an excellent listener and be curious.
- Be aware of your body language (maintain eye contact, be friendly, etc.).
- Be flexible, vary style and methods, adapt to the group's mood and learning styles.
- Take notes on the main ideas.

It may be useful for the lead trainer to organize debriefing sessions with facilitators. Such sessions would help identify challenges in small groups and how to address them and allow for self-reflection for facilitators on what worked well and what could be improved.

Learning Styles and Group Dynamics

The aforementioned sections have offered some practical guidance for the trainers and facilitators on how to conduct this course. It would be useful to draw attention to some important theoretical observations concerning the nature of group work, which will further inform course planning and delivery.

Empirical evidence suggests that there is a range of learning styles, and that different people have different learning style preferences. Therefore, the first piece of advice to trainers is to ensure that the face-to-face training event contains a range of learning styles and thereby incorporating into the event as many learning preferences as possible: ensuring there is something for everybody!

One of the most recognized theories regarding differences in individuals' learning is that of Honey and Mumford, which identifies four basic types of learners:

Activists are "hands-on" learners who prefer to get involved and learn through trial and error. They have an open-minded approach to learning, wanting to involve themselves fully in any new experience

Reflectors prefer to learn more quietly by observing and thinking about what happened. They prefer to stand back and view experiences from a number of different perspectives, taking time to arrive at a conclusion.

Theorists like to understand the theory behind the actions. They need models, concepts and facts in order to engage in the learning process. Theorists prefer to analyze and synthesize, drawing new information into a systematic and logical "theory".

Pragmatists need to be able to see how to put their learning into practice in the real world. They like to try our new ideas, theories and techniques to see if they work, and find that theories alone alienate them from the learning process.

Lectures

A lecture is a talk given by the facilitator to transmit facts and information to the participants. It involves the facilitator talking without interruption for about, thirty minutes. The facilitator may combine the talk with visual, graphic or other training aids to complement.

This course is intended to be an interactive session and facilitators are encouraged to allow the participants to ask questions. This may be during the lecture itself or after. Participants are then allowed to ask questions at the end of the lecture. Lectures are particularly useful for large groups of participants.

Organizing a Training Activity

The facilitator should carefully consider the key things needed for a successful training activity well in advance of the training in order to be able to achieve the set objectives. The first thing would be to plan the number of participants. To enhance effective learning and participation, a range of 15 to 24 participants is recommended for each course. Secondly, you need to plan the physical setting. You are responsible for creating a good atmosphere for the participants to be able to learn. Look for a pleasant place – sufficient light, clean, tidy and business like. Arrange the tables and chairs in a suitable way (you may come very early that day or the previous day to make your preparations).

Running a Training Activity

It is always important for the facilitator and the participants to arrive on time, with the former arriving earlier to welcome the latter. In addition, the facilitator needs to organize and arrange all the required training materials well in advance.

Each training activity should always start with personal introductions to ensure that everybody (the facilitator and participants) knows each other. Where other resource persons are involved, these will also have to be introduced.

The next activity will be for the participants to identify their expectations from the course or module. They will then agree on a set of norms (dos and don'ts). All users will be provided a schedule.
For each course, module and session, objectives have to be identified. It is the duty of the facilitator to explain these objectives to the participants before proceeding to the actual training.

Facilitators are encouraged to follow the programme and to use the materials provided to avoid any delays in the curriculum. It would be advisable to inform the users/trainees of the time allowed for each activity.

Assessing a Training Activity

Assessing a training activity involves checking on the progress of the training and examining performance in order to be able to answer the following questions:

- Have the participants learnt?
- Was the training effective?
- How was the course organization and management?

This is part of an evaluation exercise aimed at ensuring that the training objectives are being achieved. The feedback information is then used to correct any problems that may arise, or to make any improvements for future use where necessary.

Training evaluations can be formal, informal, or may take the form of exercises and multiple- choice questions.

Formal Assessments

Assessments can be carried out in the form of procedures such as tests, exercises, examinations, etc. The objective is to discover what the participants have learnt. They indicate to the facilitator whether or not alterations are needed in order to achieve course objectives.

This course has been designed with a number of exercises and questions. These should be continuously used by the trainer to assess the learning progress of all users.

Informal Evaluation

This evaluation is made by the facilitator and the outcomes rely on his/her judgment. Actions such as deducing whether the users are actively involved in the learning process, the frequency with which they leave the lecture room, the levels of their participation and interest in discussions, and the type of questions asked are good indicators. In addition, the facilitator may ask questions like:

- What did you learn in this session?
- What do you think of this course?

Other Assessments

This includes the following:

- True or false exercises;
- Multiple-choice questions;
- Recall questions.

An end-of-course evaluation shall be carried out at the end of the course or module. This could be done formally by administering a questionnaire, or informally by the use of any other techniques listed in this training manual. A specimen copy of the Evaluation Form has been attached for ease of use. The information generated is used to strengthen the curriculum and training methods employed. All completed questionnaires should be studied by the facilitator and summarized.

Overall Course Objectives

To build capacity by imparting knowledge and best practices in procurement within procuring agencies.

Specific Objectives

By the end of the course the participants should be able to:

- Understand the procurement environment in local government;
- Identify procurement needs;
- Draw procurement plans;
- Understand procurement activities and methods;
- Understand how to prepare technical specification and Terms of Reference;
- Carry out pre-qualification and short listing;
- Carry out contract negotiation;
- Identify the roles of various parties in procurement;
- Understand the tendering process;
- Evaluate bids, award contracts and prepare contract agreements;
- Carry out contract supervision, evaluation, monitoring and follow up;
- Understand and explain the ethical code of conduct.

Tentative Course Planner

NOTE: This training timetable is indicative only and may have to be adjusted each day, depending on the time available and the circumstances of the training. This training will be more likely to run to schedule if participants can ensure they are on time each morning and when returning from break.

- This course planner is broken down into two segments. The first table is an OVERVIEW of the entire training schedule:
- Following the overarching schedule, you will find the schedule for each module and the sub-parts within that module i.e., FPPRA Admin and Dept. Admin.

1. Overall Schedule (Tentative)

OVERALL SCHEDULE (INDICATIVE)		
UNIT	**SESSION**	**COMPONENTS**
Overview/Introduction to e-PADs: 30 Minutes	Introduction to e-PADs	• Introductions, aims and objectives of the training • Interactive session to introduce trainees to one another
Module 1: Understanding the Procurement Environment 1 Hour	Principles of Public Procurement	• Session objectives • Introduction • Objectives of Procurement • Categories of Procurement • Principles of Public Procurement

End of Module Assessment: 30 Minutes **Total Time Module 1:** 1 Hr 30 Min		• Good Practices • Discussion on PPRA Rules • Discussion on role PPRA plays • Roles and Responsibilities of key stakeholders
Module 2: User Management **FPPRA Admin:** 2 Hour 40 Minutes **Break:** 30 Minutes **Dept. Admin:** 2 Hours **End of Module Assessment:** 30 Min **Total Time Module 2**: 5 Hours 40 Minutes	Detailed instructions on how System Users can use the e-PADS portal	• Step-by-step breakdown of how FPPRA Administrators and Department Administrators can use the e-PADS portal
Training for Supplier Profile Management		
Module 3.1: Supplier Profile Management (For Suppliers) 3 Hours 40 Minutes	Detailed instructions on how to register as a supplier and how to manage/edit supplier profile on the e-PADS portal	• User will be taught how to edit/manage Supplier Business Profile • Edit/Manage bank details • Registration Bodies • Shareholder & Board Member information etc.
Module 3.2: Supplier Profile Management (For PPRA Admins) 1 Hour 30 Minutes **End of Module Assessment:** 30 Min **Total Time:** 5 Hr 40 Min	Detailed instructions on how to manage supplier registration and joint venture requests, manage backlisting.	• Supplier Registration Request • Joint Venture Request • Blacklisting
Training for Procurement Plan		
Module:4 Procurement Plan 1 Hour 40 Minutes **End of Module**	Detailed instructions on how to create a procurement plan and how to add activities in a procurement plan.	• User Login • Create Procurement Plan • Add Procurement within a Procurement Plan.

Assessment: 30 Min **Total Time**: 2 Hrs 10 Min		
Post-Training Evaluation 15 Minutes	A post-training evaluation is conducted to understand what trainees have learnt from this session	

NOTE: Post-Training Evaluation forms are to be found at the end of the training manual.

2. Module Wise Training Schedule

Schedule for each Module and their respective Sub-Parts.

Introductory Session - 30 Minutes

DESIGN AND DURATION OF INTRODUCTORY SESSION		
No.	**Activity**	**Time Allocation**
1.	**Introduction and Session Objectives** ▪ Welcome, introduction to PPRA ▪ Aims and Objectives of training ▪ Brief overview of e-PADs ▪ Trainer should introduce themselves and the facilitator and ask participants to briefly introduce themselves for example what is the name of each user and which department each user is from. ▪ Conduct quick interactive game as mentioned in training manual to set the flow for the training.	30 Minutes
	Total time:	**30 Minutes**

TRAINING MODULE 1: Introduction to Public Procurement – 1 Hour

DESIGN AND DURATION OF MODULE ONE		
No.	**Activity**	**Time Allocation**
1.	**Introduction and Session Objectives** ▪ The facilitator presents the session objectives ▪ Outline key issues for the session	**05 Minutes**
2.	**Methods** ▪ Group discussion on what is procurement, procurement objectives, principles of public procurement, key playersand their roles ▪ The trainer then gives answers to these questions based on the discussion points in the training manual ▪ Group discussion on PPRA Principles of Procurement followed by an explanation of what is written on their website ▪ Group discussion on what key roles PPRA serves	**10 Minutes** **10 Minutes** **20 Minutes** **10 Minutes**
4.	**Lessons Learnt, Application and Summary** ▪ Summarize the key discussion points in the session. ▪ Ask participants to share something that they have learned in this session and how they could apply this newknowledge to their work situation.	**05 Minutes**

	In-Training Assessment ▪ Trainer is to conduct an In-Training Assessment to evaluate the participant's understanding of the module. **End of Module Assessment** ▪ Trainer / facilitator will pass the end of module questionnaire to participants. ▪ This assessment is conducted to evaluate participant's understanding of the module.	**30 Minutes**
	Total time:	**1 Hr 30 Minutes**

TRAINING MODULE 2: User Management – 4 Hours 55 Minutes

NOTE: This module is further sub-divided into 2 sections with training times allocated to the FPPRA Administrator and the Department Administrator

Training for FPPRA and Department Admin

DESIGN AND DURATION OF MODULE TWO		
No.	**Activity**	**Time Allocation**
1.	**Introduction and Session Objectives** ▪ The facilitator presents the session objectives which are to **train System Users on how to use the e-PADS portal**	**05 Minutes**
3.	**FPPRA Admin** ▪ Add Ministries ▪ Add Internal Users ▪ Add Roles ▪ Edit Roles ▪ Add Groups ▪ Edit Groups ▪ Merge Ministry ▪ Split Ministry **Total time:**	**30 Minutes** **45 Minutes** **15 Minutes** **15 Minutes** **15 Minutes** **15 Minutes** **20 Minutes** **2 Hrs 40 Min**
	Break 30 Minutes	
4.	**Department Admin** ▪ Add Department ▪ Add Internal Users ▪ Add Roles ▪ Edit Roles ▪ Add Groups ▪ Edit Groups **Total Time:**	**30 Minutes** **45 Minutes** **10 Minutes** **10 Minutes** **10 Minutes** **10 Minutes** **1 Hr 55 Min**

5.	**End of Module Assessment** ▪ Trainer / facilitator will pass the end of module questionnaire to participants. ▪ This assessment is conducted to evaluate participant's understanding of the module.	**30 Min**
	Total time:	**5 Hrs 40 Min**

TRAINING MODULE 3 – Supplier Profile Management (For Suppliers)– 3 Hours 40 Minutes

DESIGN AND DURATION OF MODULE THREE		
No.	**Activity**	**Time Allocation**
1.	**Introduction and Session Objectives** ▪ The facilitator presents the session objectives which are how to train users on registering as a supplier and how to manage/edit supplier profile on the e-PADs portal	**10 Minutes**
2.	**Create Account**	**05 Minutes**
3.	**Supplier Business Profile Management**	**45 Minutes**
4.	**Address Overview**	**10 Minutes**
5.	**Bank Details**	**20 Minutes**
6.	**Registration Bodies**	**20 Minutes**
	BREAK 30 Minutes	
7.	**Add Fee**	**20 Minutes**
8.	**Add HR Profiles**	**15 Minutes**
9.	**Add Board Member Information**	**10 Minutes**
10.	**Add New Board Member**	**10 Minutes**
11.	**Add Shareholder Information**	**10 Minutes**
12.	**Add New Shareholder**	**10 Minutes**
13.	**Supporting Documents**	**05 Minutes**
14.	**OTP**	**05 Minutes**
	Total Time:	**3 Hrs 40 Min**

TRAINING MODULE 3.1 – Supplier Profile Management (For PPRA Admins)– 1 Hours 30 Minutes

DESIGN AND DURATION OF MODULE THREE.TWO		
No.	**Activity**	**Time Allocation**
1.	**Introduction and Session Objectives** ▪ The facilitator presents the session objectives which are how to train PPRA Admins to manage supplier registration request, joint venture request and blacklisting on e-PADs portal	**10 Minutes**
2.	**Manage Supplier Registration Request**	**20 Minutes**
3.	**Manage Joint Venture Request**	**20 Minutes**
BREAK 15 Minutes		
4.	**Blacklisting**	**20 Minutes**
5.	**Addressing participants questions regarding the session.**	**15 Minutes**
	End of Module Assessment ▪ Trainer / facilitator will pass the end of module questionnaire to participants. ▪ This assessment is conducted to evaluate participant's understanding of the module.	**30 Minutes**
	Total Time:	**2 Hours**

TRAINING MODULE 4 – Procurement Plan - 1 Hours 40 Minutes

DESIGN AND DURATION OF MODULE FOUR		
No.	**Activity**	**Time Allocation**
1.	**Introduction and Session Objectives** ▪ The facilitator presents the session objectives which are how to train users to create procurement plan and add activities within a plan.	**05 Minutes**
2.	**User Login**	**10 Minutes**
3.	**Create Procurement Plan**	**10 Minutes**
4.	**Add Procurement Activities**	**30 Minutes**
BREAK 15 Minutes		
5.	**Add Procurement Method / Procedure**	**30 Minutes**
6.	**End of Module Assessment** ▪ Trainer / facilitator will pass the end of module questionnaire to participants. ▪ This assessment is conducted to evaluate participant's understanding of the module.	**30 Mintutes**

	Total Time:	2 Hr 10 Min

Introductory Session

DESIGN AND DURATION OF INTRODUCTORY SESSION		
No.	**Activity**	**Time Allocation**
1.	**Introduction and Session Objectives** ▪ Welcome and introduction to PPRA ▪ Aims and Objectives of training ▪ Trainer should introduce themselves and ask participants to briefly introduce themselves.	30 Minutes
	Total time:	**30 Minutes**

Here are some suggestions of what to cover in this session: You will need to adjust what you include depending on the time available.

1. Welcome

This can include things like:

- Welcoming the trainees
- Trainer and facilitator should introduce themselves
- Background to the training if needed, for example, information about the Public Procurement Regulatory Authority (PPRA)
- Any other information that may be needed, for example, accommodation, bathroom locations etc.

2. Introductions

Introductions are useful when the participants do not know each other very well. They also help create a friendly atmosphere for the training that follows. There are a number of ways that you can conduct introduction activities.

Note: An issue with introduction activities is they can take up a lot of time, reducing time available for other activities within the training. The aim is to keep the introductions as brief as possible, but at the same time allow participants to feel they are familiar with the other people in the group.

A simple method for introductions is given below:

1. Ask each participant to introduce the person next to them to the rest of the group, using the following brief questions as a guide:
   - What is your name?
   - What is your role in your Procurement Agency?
2. After the participants have introduced themselves, make sure you introduce the members of the training team and any other resource persons present at the training.

Alternatively, Participants are asked to introduce themselves by stating their names, their organizations and the reason(s) why they signed up for the training. The facilitator then asks one participant to lead a discussion about the participants' expectations from the course. The expectations should be noted on a flip chart and hanged on a board or wall.

3. Aims and Objectives of Training

These refer to the overall aims and objectives of the Procurement and Implementation Module training, that is, what we expect the participants will have achieved by the time they complete the training.

Note that there are also specific objectives relevant to each particular session and these should be referred to at the beginning of each session.

1. Prepare the aims and objectives given below on flip chart paper before the session begins and display somewhere visible for the duration of the training, for example, on a wall in the training venue.

Aim: To assist procurement agencies in gaining the knowledge and skills required to conduct proper procurement processes, in order to successfully implement priority projects.

Objectives:

- To understand the processes involved in Public Procurement.
- To understand some principles and procedures for procurement.
- To allow users to understand how to use the e-PADS portal.

2. Point out the aims and objectives of the training to participants as written on the flip chart.
3. Ask participants if they have any feedback on these aims and objectives or if there is anything that is unclear.

4. Training Overview and Documents

1. Explain to participants that this training manual is one part in a larger training programme for employment of e-PADS by PPRA.
2. Prepare and distribute a copy of the timetable for the training to each participant. Ask participants to look at the timetable. Explain that the training timetable is indicative only and may have to be adjusted each day, depending on the time available and the circumstances of the training.
3. Highlight that the training will be more likely to run to schedule if participants can ensure they are on time each morning and when returning from the morning break.

5. "Car Park" Questions

This is a useful method when it is likely that there will be questions of a technical nature during the training that are beyond your scope of knowledge. In these cases it is better to explain that you don't know the answer, but you can find out, rather than give an incorrect answer.

The 'Car Park' is a tool you can use to 'park' any questions that you do not have an answer for at the time.

1. Put a piece of flip chart paper on the wall of the training venue labeled 'Car Park'.
2. Explain to participants that this is where you will write any questions that you are unable to answer during the training.
3. After the training, you need to follow up these questions to find answers.
4. When you have found answers to the car park questions, make sure you feed back this information to the participants.

TRAINING MODULES

- Module 1: Understanding the Procurement Environment
- Module 2: User Management
- Module 3.1: Supplier Profile Management (For Suppliers)
- Module 3.2: Supplier Profile Management (For Suppliers)
- Module 4: Procurement Plan

Login Instructions

3

e-Pak Acquisition and Disposal System

Logging Into e-PADS

The e-PADS has a separate landing page for User Management and Supplier Registration in the system.

Enter the URL https://eprocure.gov.pk to load the application homepage. Users can also log into e-PADS from the PPRA website homepage.

On the top-right corner of the homepage, Users will find the Login icon. Users will need to click the login icon and a dropdown menu will appear. User will then choose the appropriate category that applies to them i.e., either Admin Login, Supplier Login, or Super Admin Login. User must then enter a valid Username and Password to log into the application. Users cannot log into e-PADS without valid credentials.

Changing your account password

Users can change their e-PADS account password in the application by clicking their Username in the top-right corner of the application and selecting Change Password from the dropdown menu. A pop-up screen will appear which will direct Users to provide their Old Password, New Password and to confirm their New Password. Once Users have confirmed their New Password, Users can click on Change Password to set their New Password. Users can view their entered password by clicking on the eye icon located to the right of the password field.

Password Requirements:

Password must be at least 8 characters long and must contain a combination of alphabets, numbers and special characters. The first character must be an alphabet, at least one character must be in lower case and at least one numeric and one special character must be used.

If Users run into any issue, they can send an email to support@eprocure.gov.pk for support.

Actions to perform if you forget your password

In case a User has forgotten their password, User can click on Forgot Password on the login screen under the field space for Username and Password.

- System will prompt the User to enter their valid Username.
- User will then click on Confirm Username to proceed.

- A pop-up screen will appear, prompting User to enter their System Registered Email Address.
- User will enter their registered email address and click on Send Reset Link.
- System will then send a link to the User's e-PADS registered email address.
- User is to click on the link received in their email which will generate OTP (One-Time-Password) codes for both their registered email address and their mobile number.
- On the e-PADS application, User will enter both email and SMS OTPs, enter a New Password and Confirm Password.
- User will then click on Create New Password.
- A green pop-up notification will appear on the e-PADS login screen indicating that the password has been changed successfully.
- If Users run into any issue, they can send an email to support@eprocure.gov.pk for support.

LOGGING OUT OF E-PADS

To Log out of the e-PADS, Users can click on the red icon located at the top-right corner of the application.

TRAINING MODULE ONE

4

e-Pak Acquisition and Disposal System

UNDERSTANDING THE PROCUREMENT ENVIRONMENT

1. Design and Duration of Module One

DESIGN AND DURATION OF MODULE ONE		
No.	**Activity**	**Time Allocation**
1.	**Introduction and Session Objectives** ▪ The facilitator presents the session objectives ▪ Outline key issues for the session	**05 Minutes**
2.	**Methods** ▪ Group discussion on what is procurement, procurement objectives, principles of public procurement, key playersand their roles ▪ The trainer then gives answers to these questions based on the discussion points in the training manual ▪ Group discussion on PPRA Principles of Procurement followed by an explanation of what is written on their website ▪ Group discussion on what key roles PPRA serves	**10 Minutes** **10 Minutes** **20 Minutes** **10 Minutes**
3.	**Lessons Learnt, Application and Summary** ▪ Summarize the key discussion points in the session. ▪ Ask participants to share something that they have learned in this session and how they could apply this newknowledge to their work situation. . **At the end of this module, a break of 30 minutes will take place.**	**05 Minutes**
4.	**In-Training Assessment** ▪ Trainer is to conduct an In-Training Assessment to evaluate the participant's understanding of the module. **End of Module Assessment** ▪ Trainer / facilitator will pass the end of module questionnaire to participants. ▪ This assessment is conducted to evaluate participant's understanding of the module.	**30 Minutes**

	Total time:	**1 Hr 30 Min**

2. Focus Area: Principles of Public Sector Procurement

Session Objectives

The objective of this session is to enhance participants' understanding of the procurement environment keeping in mind public procurement guidelines.
By the end of this session the users should be able to:

- Define Procurement
- Explain the objectives of procurement for Public Procurement.
- Identify various forms and categories of procurement.
- Identify recommended principles of procurement in Public Sector.
- Understand the roles and responsibilities of the various parties in procurement in Public Procurement.

3. Key Topics

The main topics to be discussed and explained are:

- The meaning of procurement;
- Categories of procurement;
- Types of procurements;
- Objectives of procurement;
- Organizational aspects of procurement;
- Principles of public procurement;
- Some good practices.

4. Introduction to procurement

What is Procurement?

"*Procurement is the acquisition of goods and services to cater the identified needs of an organization".*
Procurement is the process of buying goods, works and services to satisfy the identified needs. Procurement is as important a function within a Procurement Agency as it is to the Federal Government, as it enables these entities to acquire goods, services and construction works needed to fulfill their objectives. For Procurement Agencies to be able to improve service delivery, they have to acquire goods, services and works of the right quality, at the right time, in the right quantity, from the right source and at the right price.

This session deals with the environment in which a public procurement agency operates. Session one deals with the principles of public procurement and roles and responsibilities of key players, session two is about the steps in procurement and the production of the procurement plan while session three concentrates on the various methods which can be used by a Procurement Agency to procure goods, services and works.

5. Methods

Questions for Discussion 1:
Start with a brainstorming activity by asking the following questions:

1. What do you understand by the term 'procurement'?
2. Is procurement in the public sector different from procurement in the private sector? If yes, why?

Key ideas to draw out:
Question 1: Ideally participants should have some prior understanding of the term 'procurement'. The information/examples below can be used to illustrate what procurement can mean in different situations.

Procurement is the process of acquiring goods, works or services from suppliers. It is similar in meaning to *purchasing*, but it can also include *hiring* the services of something orsomeone. Here are some examples:

- Contracting a builder to construct a school classroom (works)
- Hiring a technical expert to assist with the design of a project (services)
- Purchasing some furniture from a supplier (goods)

Question 2: The main idea here is that public procurement is a process that uses public funds for municipal projects. Therefore, there are certain principles to be upheld and procedures to be followed to ensure that proper use is made of public funds and get the best value for money. By contrast, procurement in the private sector does not always have the same constraints. For example, a business owner may decide to choose a particular supplier for their business supplies based on personal preference only, without comparing a number of different quotes to get the best price. This kind of flexibility is not normally allowed in the public sector because it can be open to misuse of public funds.
The information in the shaded box may be helpful to further explain the above points

Note that when we talk about procurement for municipality projects, we are talking about the use of public funds, that is, funds which come from the tax payers of the district. Therefore, the procurement process is referred to as 'public procurement'.
There are certain principles which must guide the public procurement process. These principles cover a set of values or desired behaviour and flow through every aspect of the procurement process.This is to ensure that districts get the best value for money in their use of public funds and that the whole community benefits from the process, not just 1 or 2 individuals.

The facilitator then gives a lecture by filling in the gaps to the responses in the brainstorming activity and explaining the key issues in the session.

6. Lessons Learnt, Application and Summary

Note: The amount of time you can spend here will depend on how much time you have left in the session. If time is short you might only be able to present a very brief summary of the key points and move on to the next session.

To help the participants reflect on what they have learnt in the session, the trainer should then ask the participants the following questions.

- What have you learnt from this session?
- Differentiate between centralized and decentralized organization of the procurement function.
- Identify two special problems in public procurement.

To help the participants think about how they are going to apply the knowledge they have gained, the trainer should ask the participants to reflect on the following questions:

- How can you apply the information that you have acquired?
- What will you do differently when you return to your job?

Finish the session by summarizing the main issues covered.

7. Teaching Materials / Aids / References

- Flip Charts/Boards, Markers/Chalk, Masking tape
- The User Manual

8. Procurement in Public Sector

The overall responsibility for the execution of the procurement process in the Public Sector solely relies on the Procuring Agency. The Procuring Agency is required to establish a Procurement Committee that will handle all matters concerning the procurement of goods, services and works. The Procurement Committee has powers to award contracts for procurement of goods, services and works.

9. Objectives of Procurement

The objectives of procurement are;

- To provide Procuring Agencies with a constant flow of goods, services and works to cater its needs.
- To reduce cost through more efficient and effective purchasing by buying appropriately to obtain "Value of Money" without compromising the quality of goods, services and works.

10. Categories of Procurement

Procurement can be categorized into the following;

- **Works:** Construction, design, rehabilitation, maintenance and repair of buildings, bridges, roads, plant, etc.
- **Goods:** This should include goods such as materials, drugs, foodstuffs, stationeries and office supplies, etc.
- **Non-Consultancy Services:** Such as cleaning services, revenue collection, security services and repair services.
- **Consultancy Services:** Studies for designs and provision of technical assistance, training, engineering design and supervision.

11. Principles of Public Procurement

The overall objective of the public procurement system is to provide value for money to Procuring Agency by ensuring that public funds are spent in a transparent, efficient, and fair manner. The procurement guidelines and procedures for Procuring Agency are designed to promote competition, fairness/equity, transparency, accountability and ethics, and value for money.

The basic principles for the procurement of goods, services and works, within the public sector are:

- **Transparency:** Procurement process should be conducted in such a way that there is openness and clarity on procurement policy and all interested parties know and understand the actual procedures and processes by which contracts are awarded and managed. A transparent procurement system is the one that has clear regulations and procedures, standardized tender documents, standardized tender contracts and a fair process.

- **Accountability:** The public officials who are dealing with procurement activities have responsibilities and obligations for performance and stewardship. A good procurement system should have clear lines of responsibility in decision making and public officials responsible for procurement should be made accountable for their decisions.
- **Equal Treatment / Fairness:** An efficient public procurement system should give all participants an equal chance to compete and by avoiding discrimination among potential bidders. Potential suppliers should be treated equally and with utmost fairness throughout the contract award process.
- **Value for Money:** Procurement process should aim at acquiring the right items at the right time, and at the right price to support government actions.
- **Appeal Rights:** Potential suppliers should be provided with a mechanism for review of grievances and correct failures of the system.
- **Integrity:** The public officials responsible for procurement activities should not involve themselves in corruption or collusion with suppliers or others.
- **Competition:** Procurement should be carried out by competition unless there are convincing reasons to the contrary. Public procurement system should be able to attract high quality national and international suppliers and contractors capable of meeting government needs through competition.

12. Good Practice Standards

- Public authorities involved in the procurement process should be held accountable and the process should be transparent.
- Avoid favoritism and corrupt practices in the procurement process; the process should be equitable, fair, and honest.
- The procurement procedure should ensure a high enough level of competition.
- The authorized procurement committee will ultimately decide on all procurement activities.

13. Roles and Responsibilities

Who are the key players in procurement and what are the roles and responsibilities of each Stakeholders?

The roles and responsibilities of various parties are summarized below:

Stakeholders	Responsibilities
Public Procurement Regulatory Authority (PPRA): 1. Federal PPRA 2. Punjab PPRA 3. KPPRA 4. GB PPRA 5. AJ & K PPRA 6. Sindh PPRA 7. Balochistan PPRA	• Disseminate information related to the Public Procurement Act; • Monitor and enforce compliance with the Public Procurement Act; • Formulate, promote, support, and implement capacity building programs; • Formulate policy and standards for procurement, disposal, and concession;

	• Develop and issue procurement and disposal standard documents; • Review and assess the operations of public procurement and disposal and make improvements as and when necessary; • Prepare an annual report on the overall functioning of the public procurement and disposal system, including a profile of procurement activities, to be presented to the Minister of Finance to be tabled before Parliament; • Conduct, at least annually, a public procurement forum bringing together public sector, private sector, members of public, and development partners to address issues related to public procurement; • Publish a quarterly bulletin on public procurement and disposal which shall include as applicable, procurement notices, list of debarred firms, notices of invitation to bid, and information on contract awards; and a list of complaints and appeals received and their outcomes; • Advise Government on issues related to public procurement and disposal; • Investigate and debar from participating in public procurement any bidders who have committed fraud and corruption or who have seriously neglected their obligations under a public procurement contract or done anything in contravention of the procurement legislation; • Maintain a list of suppliers, contractors, consultants, and prospective bidders who have been debarred from public procurement disposal and concession and communicate the list to procurement entities on a regular basis; • Conduct independent inspections and reviews of complaints and appeals related to the procurement process and make decisions thereon; • Provide interpretations of the public procurement legislation and other instruments governing the procurement processes under the Public Procurement Act; • Provide administrative and secretarial services to the Independent Procurement Review Panel; and • Perform such other functions as are incidental to the attainment of the objectives of the Public Procurement Act.
Procuring Agency (PA) and PA's Procurement Committee	**Procuring Agency:** • Overall coordination, direction and development of procurement practices and procedures in Local Government; • Professional development and training of staff and officials engaged in procurement in local government;

	Procurement Committee:
	• Ensuring that best practices in relation to procurement are strictly adhered by the municipality
	• Coordinate the development and approval of the Annual Procurement Plan Approve entries and removals from the Register of Suppliers and Consultants;
	• Approve entries and removals from the Register of Suppliers and Consultants;
	• Review and approve prior to any announcement of a procurement process:
	    ✓ the method of procurement;
	    ✓ the bidding documents;
	    ✓ the specifications, classifications, bills of quantities, plans, drawings and terms of reference as appropriate; and
	    ✓ advertisements, letters of invitation and shortlists;
	• Approving tendering and contract documents.
	• Approve the issue of tender invitation documents and use of the appropriate methods of selecting suppliers.
	• Consideration and approval of recommendations for award of tenders issued under competitive tendering proceedings.
	• Review of all applications for variations, addenda, or amendments to on-going contracts.
	• Maintain detailed minutes of meetings and records of all decisions and recommendations.

Supplier	▪ Supplier must be complaint with PPRA rules. ▪ Supplier should avoid any misrepresentation of facts. ▪ Supplier should not engage in any corrupt or unfair practices with the procuring agency. ▪ Supplier's performance should be aligned with contract. ▪ Supplier must ensure superior quality of goods, services or works. ▪ Supplier must be competitive in terms of pricing and shall provide value for money. ▪ Supplier should be capable to meet its obligations as defined in the contract. ▪ Supplier must be able to deliver goods or services without any disruptions.

END OF MODULE ASSESSMENT (15 MINUTES)

NOTE: This training assessment will be repeated intermittently throughout the training. Trainer is encouraged to remember how to conduct this assessment as in the following modules it will referred to as 'In-Training Assessment' only. Accept answers based on concepts.

Trainer is to conduct some quick in-between module assessments. These can be done by interactive means. An example is given below.

For the purpose of conducting this training, trainer would be required to have any kind of ball on site (tennis ball /cricket ball etc.).

The trainer is to explain the rules of this activity.

- The trainer is going to randomly give the ball to a participant
- For the next thirty seconds participants are to pass the ball randomly to each other
- At the end of thirty seconds, whoever has the ball in their hands will have to answer the question asked by the trainer
- Trainer has to keep track of time elapsed

This is a nice way to get the participants to interact as well as to assess the participant's understanding of the training material.

Questions:

1. What is procurement?

Procurement is the process of buying goods, works and services to satisfy the identified needs.

2. What are the different categories of procurement?

Works, Goods, Services

3. Give an example of a procurement?

Construction, maintenance and repair of buildings, Printers, Stationaries and Office Supplies, Cleaning Services, Internet Services, Security Services. Trainer can accept any answer which comes under goods, works and services.

4. Name any two public procurement principles?

Transparency, Accountability, Equal treatment / fairness, Value for money, Appeal rights, Integrity and competition.

5. What is transparency in procurement?

Clear regulations and procedures, openness, and clarity on procurement policy.

6. Who are the key players in the procurement process?

PPRA, the Procuring Agency and the PA's Procurement Committee, and the Suppliers.

7. What is the role of PPRA?

Make regulations and lay down codes of ethics and procedures for public procurement. Monitor overall performance of Procuring Agencies. Provide and coordinate assistance to procuring agencies for developing and improving their institutional framework

8. What does an RFP stand for?

Request for Proposal.

9. When is an RFP required?

For procurement of complex nature, using consultancy services.

10. What does EOI Stands for?

Expression of Interest.

TRAINING MODULE TWO

5

e-Pak Acquisition and Disposal System

USER MANAGEMENT

The User Management module in the e-PADS is robust, comprehensive, and based on functionality that is contained within the commercially available, off the shelf enterprise technology. That will allow its administrators / users to manage roles/groups, registration of new users, manage profile/accounts information, assign logins, and generate passwords from super admin.

1. Design and Duration of Module Two

DESIGN AND DURATION OF MODULE TWO		
No.	**Activity**	**Time Allocation**
1.	**Introduction and Session Objectives** ▪ The facilitator presents the session objectives which are to **train System Users on how to use the e-PADS portal**	**05 Minutes**
3.	**FPPRA Admin** ▪ Add Ministries ▪ Add Internal Users ▪ Add Roles ▪ Edit Roles ▪ Add Groups ▪ Edit Groups ▪ Merge Ministry ▪ Split Ministry **Total time:**	**30 Minutes** **45 Minutes** **15 Minutes** **15 Minutes** **15 Minutes** **15 Minutes** **20 Minutes** **2 Hrs 40 Min**
	Break 30 Minutes	
4.	**Department Admin** ▪ Add Department ▪ Add Internal Users ▪ Add Roles ▪ Edit Roles ▪ Add Groups ▪ Edit Groups **Total Time:**	**30 Minutes** **45 Minutes** **10 Minutes** **10 Minutes** **10 Minutes** **10 Minutes** **1 Hr 55 Min**

5.	**End of Module Assessment** ▪ Trainer / facilitator will pass the end of module questionnaire to participants. ▪ This assessment is conducted to evaluate participant's understanding of the module.	**30 Minutes**
	Total time:	**5 Hrs 40 Min**

Session Objectives

e-PADS will allow its administrators / users to manage roles/groups, merge /split ministries, registration of new users, manage profile/accounts information, assign logins, OTP verification and generate passwords etc. The intended trainees of this module are all types of system administrators such as:

1. PPRA Admin
2. Department Admin

1. PPRA Admin

By the end of this session the user should be able to:

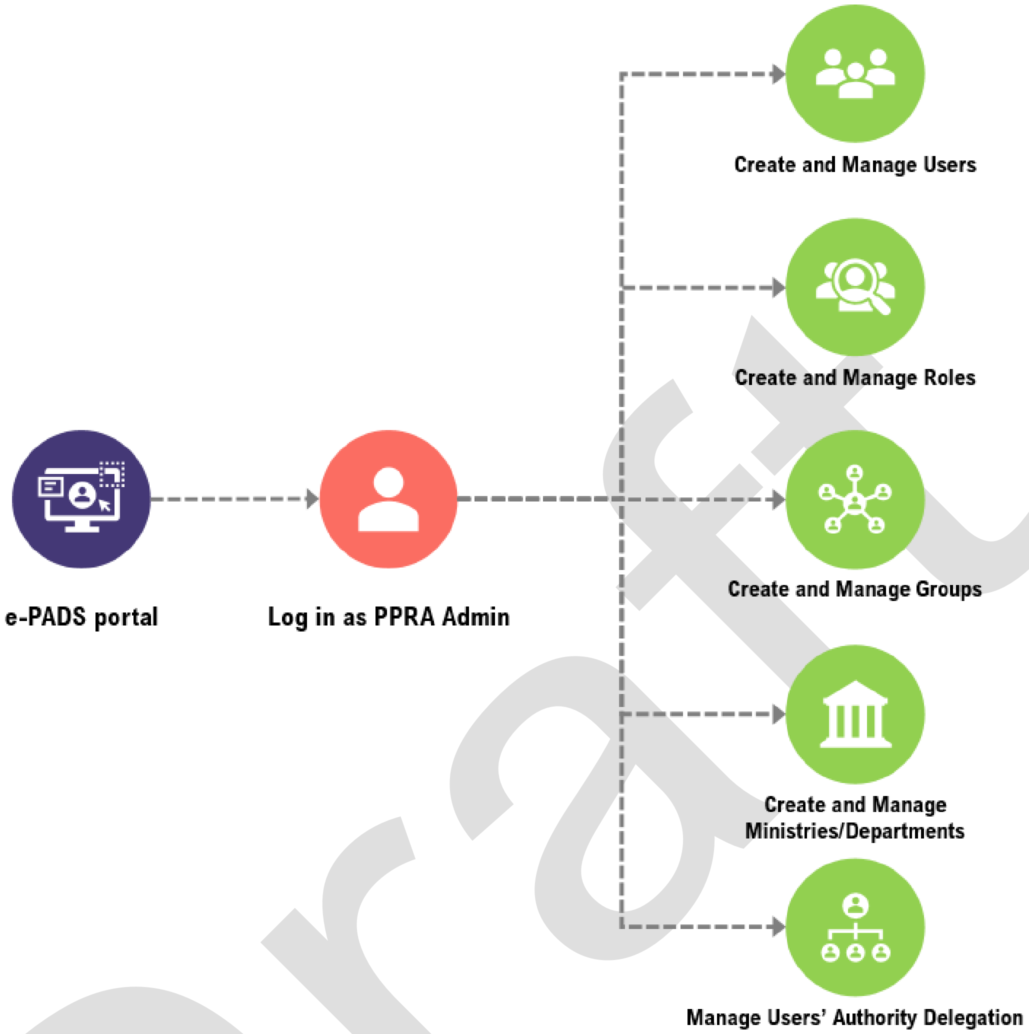
- Create a Procuring Agency (Ministries, Departments and Sub Departments) in the system.
- Create and approve logins for Procuring Agency (Ministries, Departments and Sub-Departments) Admins.
- Manage their account profile information.
- Assign roles and groups to users of their own organization and ministries and departments created by the specific PPRA Admin.

2. Department Admin

By the end of this session the user should be able to:

- Create sub-departments of their respective organization in the system.
- Create and approve logins for Department users including admins of their respective sub-department users.
- Manage their account profile information.
- Assign roles and groups to their respective organization and sub-department admins.

Actions PPRA Admins can Perform



1. Users

The e-PADS provides functionality to PPRA Admins to create internal users for PPRA. Internal users are the member of the respective PPRA. e-PADS allow PPRA Admins to create its users so every member of the PPRA can have access to the system and can perform their tasks. e-PADS also allows PPRA Admins to change their account profile information and passwords if necessary. The PPRA Admins must provide the following information in order to create its users:

1. Name
2. Email
3. Designation
4. Grade
5. Employee ID
6. Gender
7. User Role / Group Role
8. User Group
9. Date of Birth
10. CNIC
11. Mobile Number

2. Roles

The e-PADS provides functionality to PPRA Admins to assign roles to the registered internal users. PPRA Admins can assign various roles to the users based on ministerial or departmental needs. After assigning roles to the users, Admins must grant permission to users to carry out their task. They can be related to for e.g.:

1. Administrator
2. Bidding Document Creator
3. Approver
4. Viewer

3. Groups

e-PADS provides functionality to PPRA Admins to create User Groups. Groups are created among user who share the same parameters such as, users from the same organization / department can be added to a group to ease mode of communication and assignment of roles.

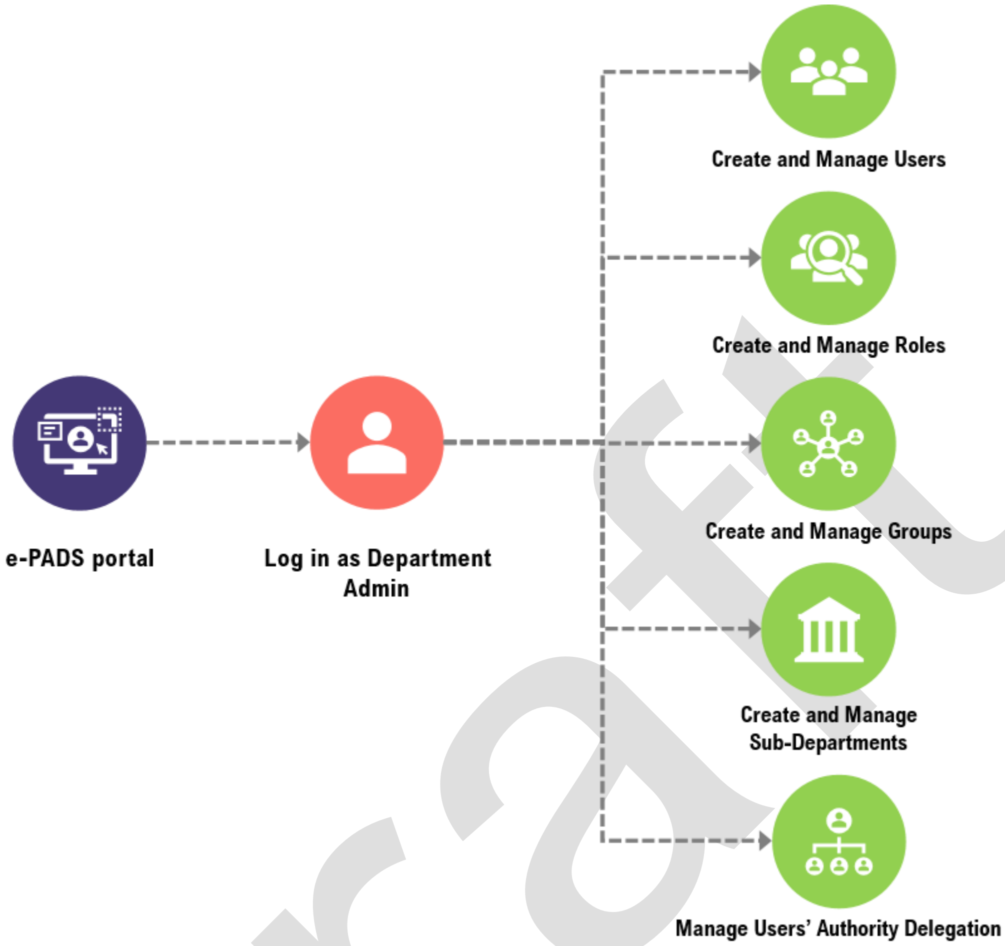
4. Create and Manage Ministries / Departments

The e-PADS provides functionality to PPRA Admins to create ministries / departments. Whereas PPRA Admins can update information, delete or de-activate the created ministry / department. PPRA Admins also have the authority to merge or split ministries.

5. Authority Delegation

PPRA Admins can delegate their authority to other personnel in the same organization / department. If for some reason the person is not available to come to the office for a certain time, the delegated personnel will take charge of the person's duties in his/her absence. PPRA Admin or user can Accept, Reject and Revoke authority delegation request they receive or the user who has received the request will have the right to accept or reject. Requests that are not being responded at the moment will be given a Pending status. Users can delete request that have been completed/ canceled/ reject/ revoked. Users cannot further delegate the authority to another user. However, he/she can delegate his/her authority to another user.

ACTIONS DEPARTMENT ADMIN CAN PERFORM



1. Users

The e-PADS provides functionality to Department Admins to create internal users of their department. Internal users are the member of the respective departments. e-PADS allow Department Admins to create its users so every member of the Department can have access to the system and can perform their tasks on the system. e-PADS also allows department Admins to change their account profile information and passwords if necessary. The Department Admins must provide the following information in order to create its users:

1. Name
2. Email
3. Designation
4. Grade
5. Employee ID
6. Gender
7. User Role / Group Role
8. User Group
9. Date of Birth
10. CNIC
11. Mobile Number

2. Roles

The e-PADS provides functionality to Department Admins to assign roles to the registered internal users. Department Admins can assign various roles to the users based on departmental needs. After assigning roles to the users, Admins must grant permission to users to carry out their task. They can be related to for e.g.:

1. Administrator
2. Bidding Document Creator
3. Approver
4. Viewer

3. Groups

e-PADS provides functionality to Department Admins to create User Groups. Groups are created among user who share the same parameters such as, users from the same organization / department can be added to a group to ease mode of communication and assignment of roles.

4. Create and Manage Departments/Sub-Departments

The e-PADS provides functionality to Department Admins to create departments/sub-departments. Whereas Department Admins can update information, delete or de-activate the created department/sub-department.

5. Authority Delegation

Department Admins can delegate their authority to other personnel in the same organization / department. If for some reason the person is not available to come to the office for a certain time, the delegated personnel will take charge of the person's duties in his/her absence. Department Admin or user can Accept, Reject and Revoke authority delegation request they receive or the user who has received the request will have the right to accept or reject. Requests that are not being responded at the moment will be given a Pending status. Users can delete request that have been completed/ canceled/ reject/ revoked. Users cannot further delegate the authority to another user. However, he/she can delegate his/her authority to another user.

END OF MODULE ASSESSMENT (30 MINUTES)

1. E-Pads Stands for e-Pak Acquisition and Disposal System.

True

2. On the e-PADS portal, it is NOT possible for users to choose a language of their own choice?

False

3. Is it possible for users of the e-PADS portal to reset their own password?

Yes

4. A user of e-PADS can receive an OTP through:

SMS and E-mail

5. Can the user of e-PADS change their contact details?

Yes

6. **How many different types of administrators exist on e-PADS?**

   PPRA Admin and Dept./Ministry Admin

7. **Can a user have multiple roles in e-PADS?**

   True

8. **Who can create ministries/department in e-PADS?**

   PPRA Admin and Department Admin

9. **What is the purpose of Groups in e-PADS?**

   To ease communication with users of similar role.

10. **Who has the authority to merge/split ministries?**

    PPRA Admin

TRAINING MODULE THREE

6

e-Pak Acquisition and Disposal System

SUPPLIER PROFILE MANAGEMENT (FOR SUPPLIER) 3.0

This Module will enable suppliers for the very first time to register on a e-government procurement website. Where they will be notified of all the published tenders to participate, and suppliers can submit their bids and proposals directly on the system. This module will help suppliers to register on e-PADS by providing all the relevant information to the system. Suppliers will be able to manage their accounts and edit profile information.

1. Design and Duration of Module 3.0

DESIGN AND DURATION OF MODULE THREE		
No.	**Activity**	**Time Allocation**
1.	**Introduction and Session Objectives** ▪ The facilitator presents the session objectives which are how to train users on registering as a supplier and how to manage/edit supplier profile on the e-PADs portal	**10 Minutes**
2.	**Create Account**	**05 Minutes**
3.	**Supplier Business Profile Management**	**45 Minutes**
4.	**Address Overview**	**10 Minutes**
5.	**Bank Details**	**20 Minutes**
6.	**Registration Bodies**	**20 Minutes**
BREAK 30 Minutes		
7.	**Add Fee**	**20 Minutes**
8.	**Add HR Profiles**	**15 Minutes**
9.	**Add Board Member Information**	**10 Minutes**
10.	**Add New Board Member**	**10 Minutes**
11.	**Add Shareholder Information**	**10 Minutes**
12.	**Add New Shareholder**	**10 Minutes**
13.	**Supporting Documents**	**05 Minutes**

14.	**OTP**	**05 Minutes**
	Total Time:	**3 Hrs 40 Min**

SESSION OBJECTIVES

By the end of this session suppliers will be able to:

1. Self-register on e-PADS as a supplier.

- Set passwords of their accounts.

2. Manage their profile information such as;

- Business profile information
- OTP verification (email and SMS)
- Addresses
- Bank details.
- Registration bodies.
- PPRA Registration.
- Beneficial owners / HR.
- Board members.
- Shareholders.
- Supporting documents.

2. Basic Supplier Registration

To make the registration process simple, suppliers can enter the system using basic information such as their Username, Business Name, Mobile Number, Email Address and Password. Basic supplier registration would allow suppliers to view procurement opportunities and receive notifications. However, suppliers are only able to view procurement opportunities and receive notifications, they cannot participate in the bidding process.

3. Supplier Profile Management

Under Basic Supplier Registration, Suppliers can view and receive notifications, but they cannot participate in the bidding process. To participate in the bidding process, Suppliers need to fill out the Supplier Profile Management section which includes giving more detailed information about the Supplier and their business.

The Business Information required to be filled by the user consists of : Business Profile, OTP Verification, Beneficial Owner(s), Human Resource(s), Registration Bodies, Bank Details, Supporting Documents, PPRA Registration, Board Member(s), Shareholder(s), Address(es), Joint Venture.

Business information can be filled out on the following entities: Individual / Consultants, Sole Proprietorship, Limited Private, Limited (Public – By Company), Holding Company, Partnership, Limited (Public – By Guarantee), Government Entity, Government Owned Entity (Private Limited), Government Owned Entity (Public Limited), NGO / NPO. Suppliers are required to provided supporting documents such as their SECP Registration Certificate, GSTN Certificate, DRAP Registration Certificate, FBR NTN Certificate.

SUPPLIER PROFILE MANAGEMENT (FOR PPRA ADMINS) 3.1

This Module will enable PPRA Admins to Manage Supplier Registration Request, Joint Venture Request and Blacklisting of suppliers.

1. Design and Duration of Course

DESIGN AND DURATION OF MODULE THREE.TWO		
No.	**Activity**	**Time Allocation**
6.	**Introduction and Session Objectives** ▪ The facilitator presents the session objectives which are how to train PPRA Admins to manage supplier registration request, joint venture request and blacklisting on e-PADs portal	**10 Minutes**
7.	**Manage Supplier Registration Request**	**20 Minutes**
8.	**Manage Joint Venture Request**	**20 Minutes**
	BREAK 15 Minutes	
9.	**Blacklisting**	**20 Minutes**
10.	**Addressing participants questions regarding the session.**	**15 Minutes**
	End of Module Assessment ▪ Trainer / facilitator will pass the end of module questionnaire to participants. ▪ This assessment is conducted to evaluate participant's understanding of the module.	**30 Minutes**
	Total Time:	**2 Hours**

SESSION OBJECTIVES

By the end of this session PPRA Admins will be able to:

- Manage Supplier Registration Request
- Manage Joint Venture Registration Request
- Backlist Suppliers

2. Manage Supplier Registration Request

e-PADS provides functionality for PPRA Admins to Accept / Reject Supplier Registration Request. The system allows PPRA Admins to view lists of accepted and rejected list of suppliers.

3. Manage Joint Venture Request

e-PADS provides functionality for PPRA Admins to Accept / Reject Joint Venture Request. PPRA Admins can view approved / rejected lists of joint ventures.

4. Supplier Blacklisting

e-PADS provides functionality for PPRA Admins to Blacklist suppliers based on their performance.

END OF MODULE ASSESSMENT (30 MINUTES)

1. **Suppliers cannot add branch officers in their profiles**

   False

2. **In the procurement process, the Supplier:**

   - Must be compliant with PPRA rules
   - Should avoid any misrepresentation of facts
   - Should be capable of meeting its obligations as defined in the contract

3. **The purpose of the Supplier Registration Module was to show:**

   How Suppliers can register, manage and edit their profile on e-PADS.

4. **Does a private limited company need to specify its shareholding?**

   Yes

5. **Name one supporting document needed to send by the supplier**

   SECP Registration Certificate, GSTN Certificate, DRAP Registration Certificate and FBR NTN Certificate.

6. **How many Business Entities are there in the Business Profile?**

   11

7. **Can Supplier update their profile?**

   Yes

8. **How many Joint Ventures can a supplier create in a system?**

   Unlimited

9. **What is the minimum duration of a JV to register in the system?**

   6 Months

10. **Who approves Supplier Registration?**

    PPRA Admins

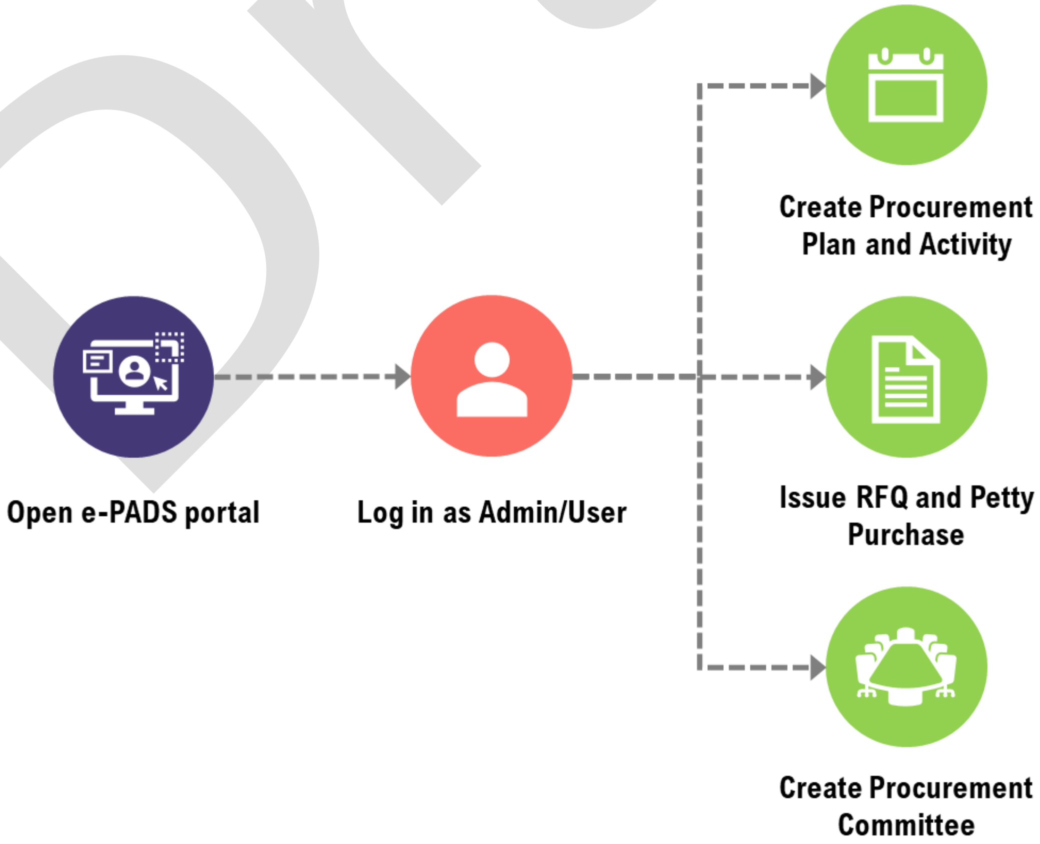
Training Module Four

7

for e-Pak Acquisition and Disposal System

Procurement Plan

In this section, users will be able to create procurement plan, supporting a periodic process of procurement planning with an objective to create and publish annual procurement plans. The system will allow authority's administrators to create, configure, and manage a variety of templates of digital requisition forms, Description of Services that will assist Procurement Planning & Management Units (PPMUs) of Procuring Agencies during planning and strategy development phase. The system will enable authorized authority's administrators to configure and manage procurement laws and parameters to ensure compliance with corporate, national, and international obligations.



1. Design and Duration of Module Four

DESIGN AND DURATION OF MODULE FOUR		
No.	**Activity**	**Time Allocation**
1.	**Introduction and Session Objectives** ▪ The facilitator presents the session objectives which are how to train users to create procurement plan and add activities within a plan.	**05 Minutes**
2.	**User Login**	**10 Minutes**
3.	**Create Procurement Plan**	**10 Minutes**
4.	**Add Procurement Activities**	**30 Minutes**
BREAK 15 Minutes		
5.	**Add Procurement Method / Procedure**	**30 Minutes**
6.	**End of Module Assessment** ▪ Trainer / facilitator will pass the end of module questionnaire to participants. ▪ This assessment is conducted to evaluate participant's understanding of the module.	**30 Minutes**
	Total Time:	**2 Hr 10 Min**

Session Objectives

The Procurement Plan module in the e-PADS will allow its administrators / users to create procurement plan, activity and initiate procurement. The intended Users of this module are

1. PPRA Admins/Users
2. Department Admins/Users.

By the end of this session the user should be able to:

- Create Procurement Plan
- Create Procurement Activity
- Issue RFQ and Petty Purchase
- Issue Purchase Order
- Create Committee

2. Create a Procurement Plan

The e-PADS provides functionality to its users to create a procurement plan. The procurement plans are created on the basis of fiscal year. Only one procurement plan can be created in a fiscal year. The procurement plan consists of various procurement activities for the whole year.

3. Add Activities to the Procurement Plan

After the users have created the procurement plan, users are then required to add activities to the procurement plan. The procurement plan consists of planned procurement activity and procurement (method / procedure).

The Planned Procurement Activity requires the following information:

1. Name of the Procurement
2. Procurement Need
3. Statement of Requirement
4. Market Analysis
5. Estimated Cost
6. Make or Buy analysis
7. Concept Note / PC-1
8. Budget (Pink Book)
9. Funding Type
10. Funding Source
11. Procurement as a whole or package / lots

The Procurement Methods/Procedure requires the following information:

1. Service (Non-Consultancy and Consultancy)
2. Mode of Procurement (National or International)
3. Category of Procurement
4. Procurement Method
5. Procedure
6. Tentative Notice Date
7. Tentative Date of Contract
8. Tentative Date of Completion
9. Windo Period (Days)
10. Remarks (If any)

END OF MODULE ASSESSMENT (30 MINUTES)

1. **How many alternative methods of procurement are there?**

   Six

2. **How many procedures of open competitive bidding are there?**

   Four

3. **What is the financial limit for RFQ?**

   PKR 100,000 to PKR 500,000.

4. **What is the financial limit for Petty Procurement?**

   PKR 1 to PKR 100,000

5. **What is the principal method of procurement?**

   Open completive bidding

6. **What is the minimum time for submission of bids under International Competitive Bidding?**

   30 Days

7. **How many methods for selection of consultants are there?**

   - Quality Bases
   - Quality and Cost Based
   - Least Cost based
   - Single Source or Direct Select
   - Fixed Budget

8. **What is the minimum number of quotations required for Petty Purchase?**

   One

9. **What is the minimum number of quotations required for RFQ?**

   Three

10. **Is it compulsory for firms to have registered GST for participating in RFQ?**

    Yes

E-Pak Acquisition and Disposal System (EPADS)