Contractor Database Management System

(CDMS)

Officer User manual V 3.0   23-Oct-2024

Revision History

Version	Description	Author	Date
1.0	Document Creation	Pipilika Kumari	2-Jun-2020
1.0	Reviewed & Approved By	Nirakar Mallick	
2.0	Document Modification	Pipilika Kumari	4-May-2022
3.0	Updated	Pipilika Kumari	21-Oct-2024
3.0	Revised	Pipilika Kumari	07-Nov-2024

Contractor Database Management System

User Manual For Officer User

Table of Contents

1 INTRODUCTION

To obviate the problem of tender fixing and to eliminate the human interface in the bid submission process, Government has decided to make entire e-Procurement process electronic. There are two items which are being submitted manually by the Bidders in the designated offices in every tender. First, the Earnest Money Deposit (EMD) is being done physically in shape of Demand Draft or Bank Guarantee. Secondly, the Past Performance of the Bidders along with Documentary Evidence of same with respect of completed or ongoing projects is being submitted manually. If a bidder is submitting bids for ten projects in a year, then he/she has to submit his/her performance information ten times! This not only increases the paper work but also consumes lot of time in evaluating same by the designated authorities.

Introduction of Contractor Database Manage System has made it easier for the contractors to do the registration online and gets approval from license issuing authority without any wastage of time. The application smartens the procedure, wards of fraudulent activities, synchronizes every data and makes it transparent and user-friendly. CDMS application sees a vast modification in the future of contractor management system, bidding, performance evaluation and more.

1.1 PURPOSE

This document provides a detailed overview and description of **Contractor Database Management System** to the officer users of the department. The document will guide user to navigate easily through various menu and sub-menu tabs of the CDMS application.

2 GETTING STARTED

To start using the application, enter the website link in the browser to view the home page.
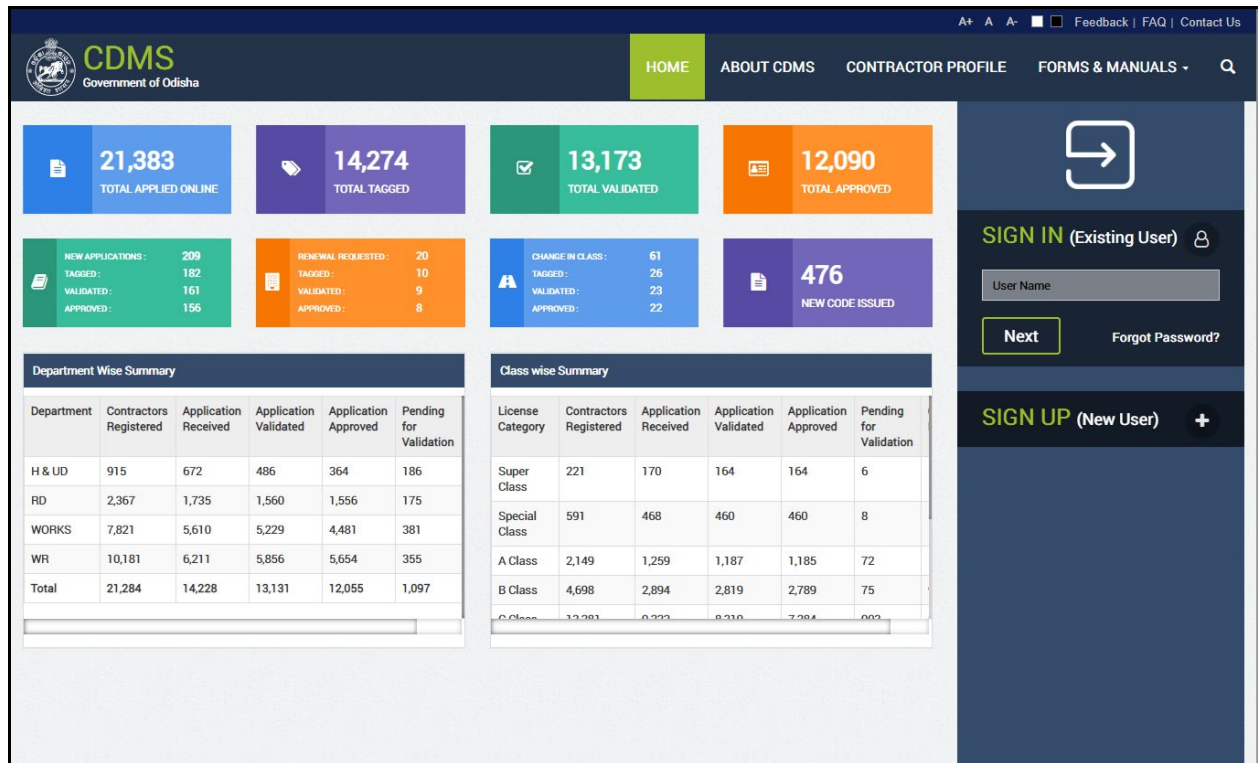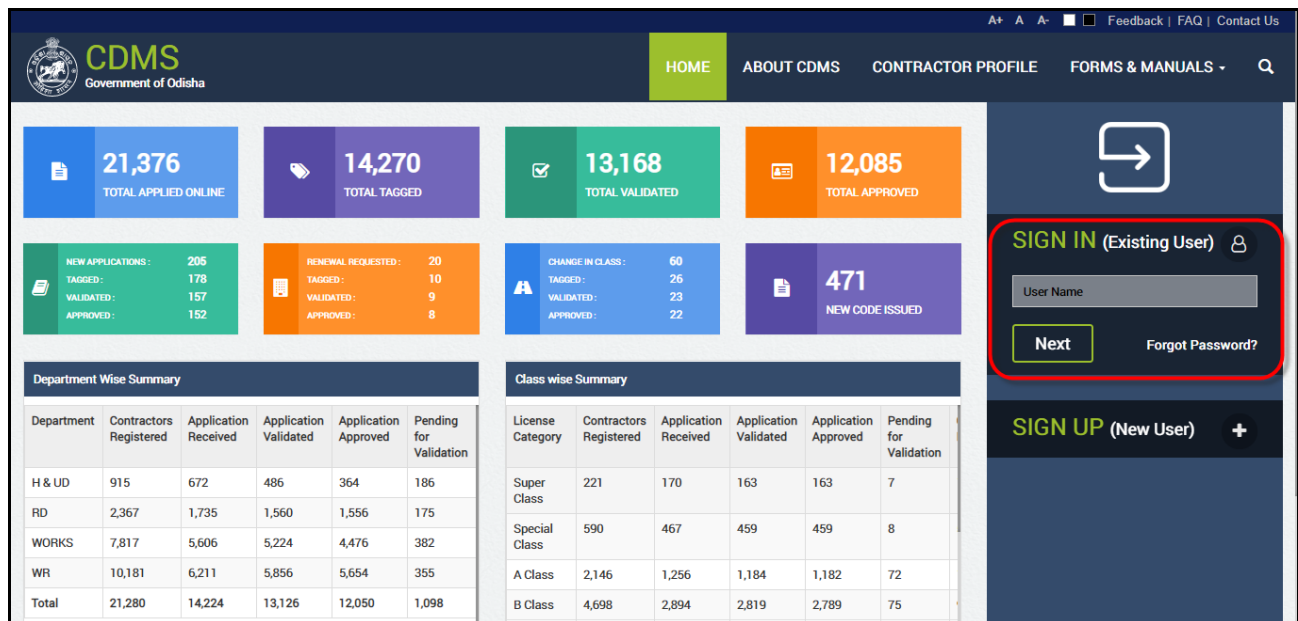
Figure 2-1 Landing Screen (1)

- In the landing screen, a pie-chart displaying the Fresh, Existing, Renewal, Upgradation, Degradation, Cancellation, and Conversion Request received from the Contractors to the department are displayed in a colour coded way. Click on Close button to close the pop-up.

- The latest announcements are displayed at the header section.

- The total number of CSF applied, tagged, validated and approved are displayed in separate portlet.

- The Total Number of New Application, Application for Renewal, Application for Change in Contractor Class and Total Code Issued are displayed in separate portlets with respective count of Tagged, Validated and Approved application.

- The Department wise CSF Summary i.e, the total number of Contractors Registered, Received, Validated, Approved, Pending for Validation and Application where Code is Issued is displayed in the table.

- The total number of Contractors Registered, Received, Validated, Approved, Pending for Validation and Application where Code is Issued with respect to various Contractor Class is displayed in a table.

2.1 SIGN IN (EXISTING USER)

To login into the portal use your respective user ID and password in the Sign in section of the home page. Refer to the screen shared below.

Figure 2-2 Landing Screen(2)

For Signing in, refer to the highlighted area in Fig. 2-2.

- Enter the user name in the textbox provided here.

- Click on the **Next** button.

Figure 2-3 Enter Password Screen

- Enter password and click on **Sign in** button.

If you have forgotten the password, then reset the password by clicking the **Forgot Password** button, shown in **Fig. 2-3**

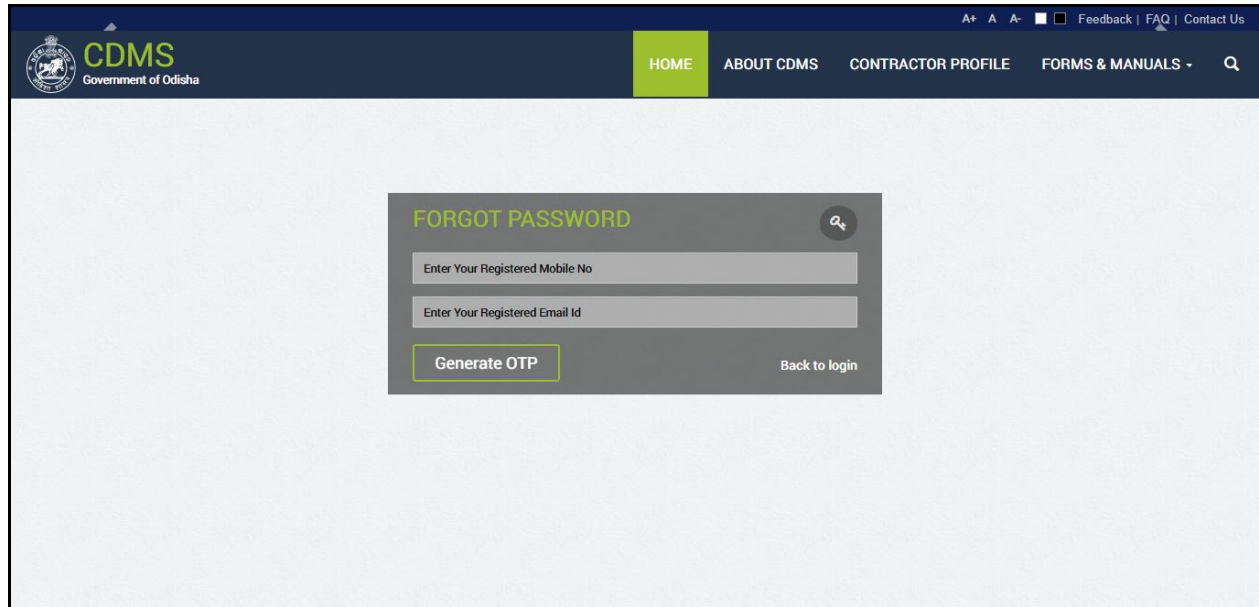Select Forgot Password button.

Figure 2-4 Forgot Password Screen

- Enter your registered mobile number.

- Enter your registered email ID.

- Click on **Generate OTP** button.

- An One-time password is sent to the registered email ID and mobile number.
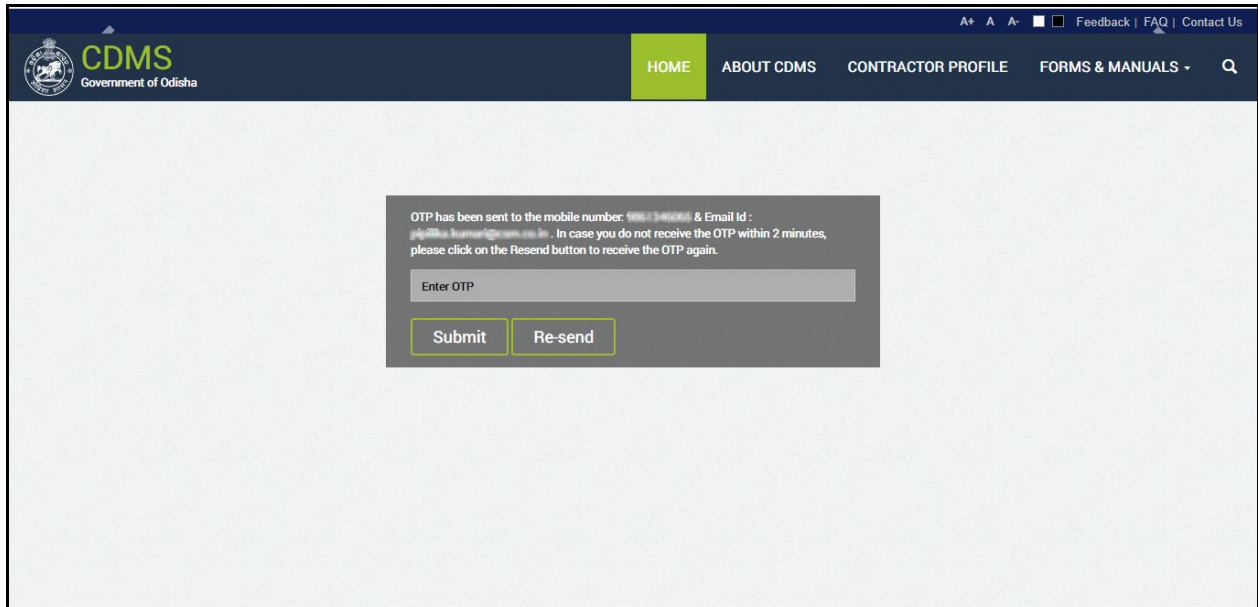
Figure 2-5 Enter OTP Screen

- Enter the OTP and click on **Submit** button.

   o Once the OTP is verified, the system will redirect you to the Create Your Password page wherein the User ID and mobile number remains default filled.

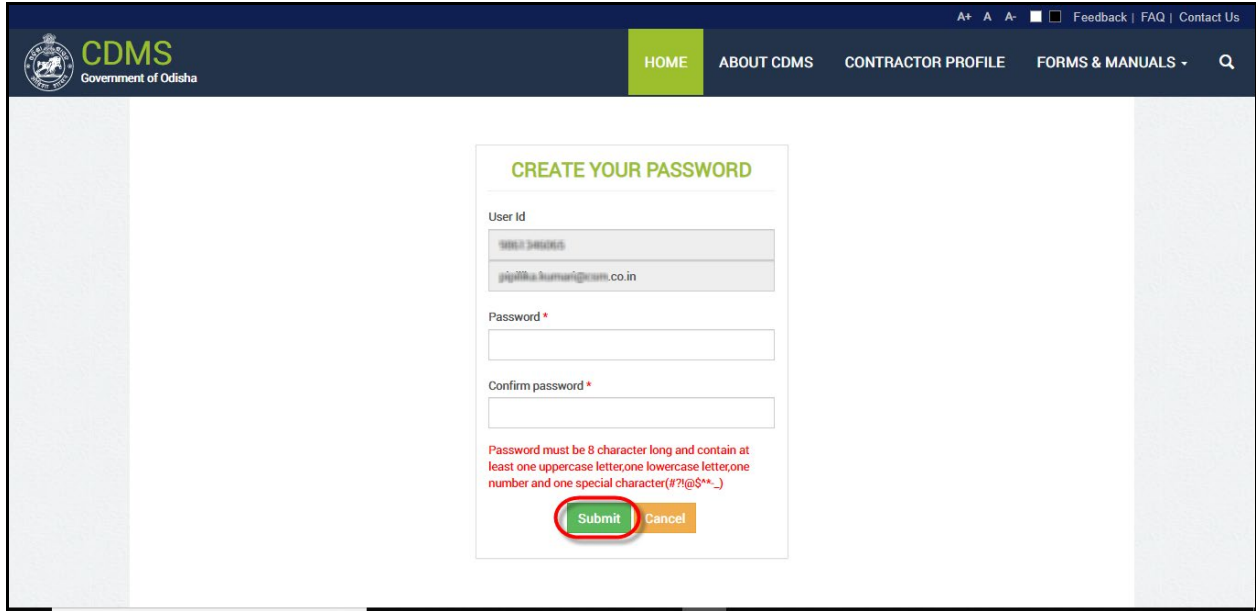- In case you did not receive the OTP in 2 minutes, click on the Re-Send button to receive the OTP again.

Figure 2-6 Create Your Password Screen

- Enter a valid password in the given space and re-enter the same to Confirm Password.

Please Note: The password should be 8 characters long with the given conditions as highlighted in red.

- Click the **Submit** button to save the password.

On submission, get redirected to the home screen dashboard for login process. Refer Fig. 2-6 above.

- Enter user name in the textbox and click on next.

- Enter password and click on **Sign In** button

3 DASHBOARD

With the successful login into the portal, system will redirect to the CDMS dashboard as shown in **Figure 3-1** below.

Figure 3-1 Dashboard Screen

This is an area where the LIA user generally gets all the information about -

- Total count of online applications, including number of applications received, validated and approved.

- Total number of new applications including number of applications that is tagged, validated and approved. Total number of renewal requests including number of applications that is tagged, validated and approved. Total number of applications received for changing class category including number of applications that is tagged, validated and approved and number of codes issued recently.

- The Department wise and class wise CSF Summary is displayed in the tabular format.

In the left-hand side, the CDMS dashboard contains necessary menu and sub-menu tabs as shown below –

Figure 3-2 Menu Link Screen

4   MANAGE APPLICATION

Manage new applications sent for license issue, renewal, or cancellation under the Manage Application tab. Here, you can do verification, approval, initiate security deposit of any new request. Do printing of registration certificate, manage contractor code and signed RC, update license data and verify profile details in this section. Add or manage pending applications with the use of various primary links.
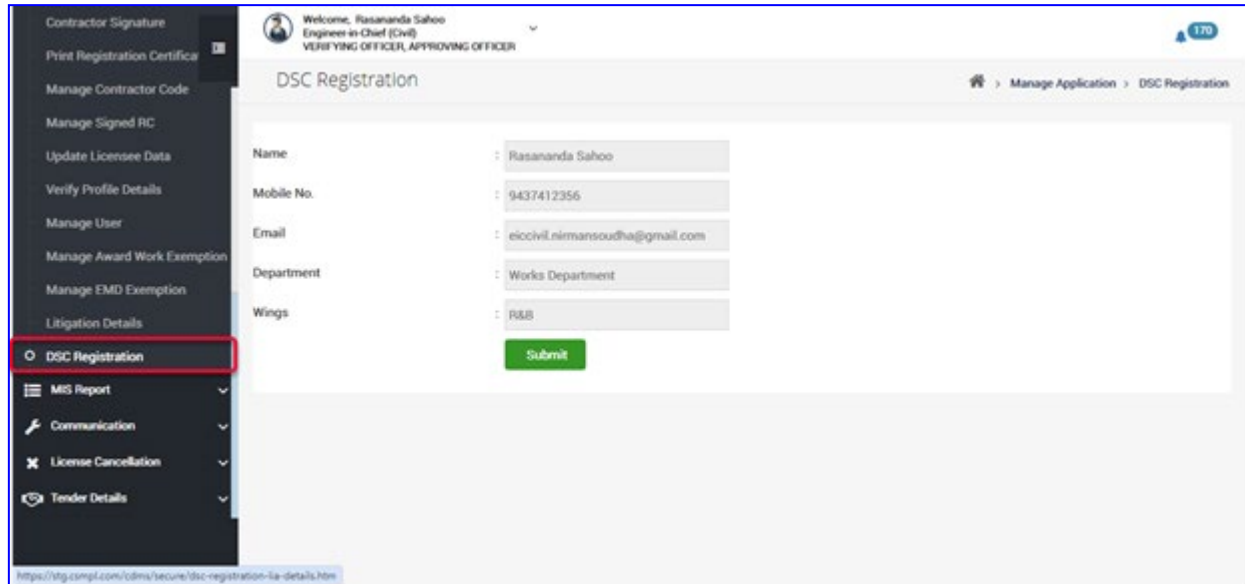
Figure 4-1 Manage Application Screen

4.1 DSC REGISTRATION

Digital signature of the documents uploaded by the authorized officer is an integral part. For that reason, to take action and upload any approval letter or certification or any kind of official letter or document in the application, the user (LIA User) needs to register the DSC details in the **DSC Register** link under the Manage Application menu link.
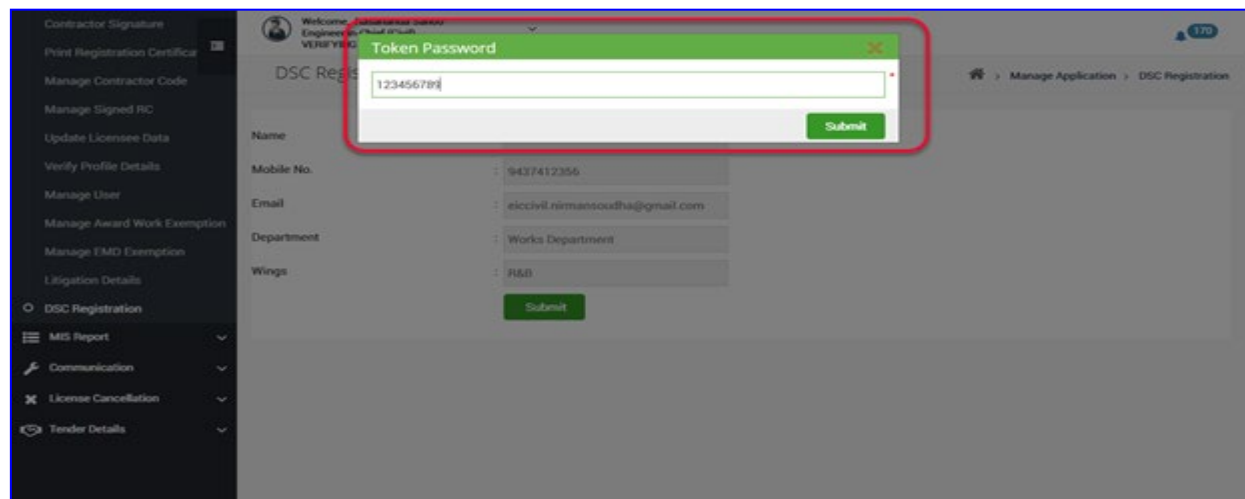
Figure 4-2 DSC Registration

The Name, Mobile Number, Email ID, Department and Wing details are already provided in the DSC registration section.

- Click on the **Submit** button.
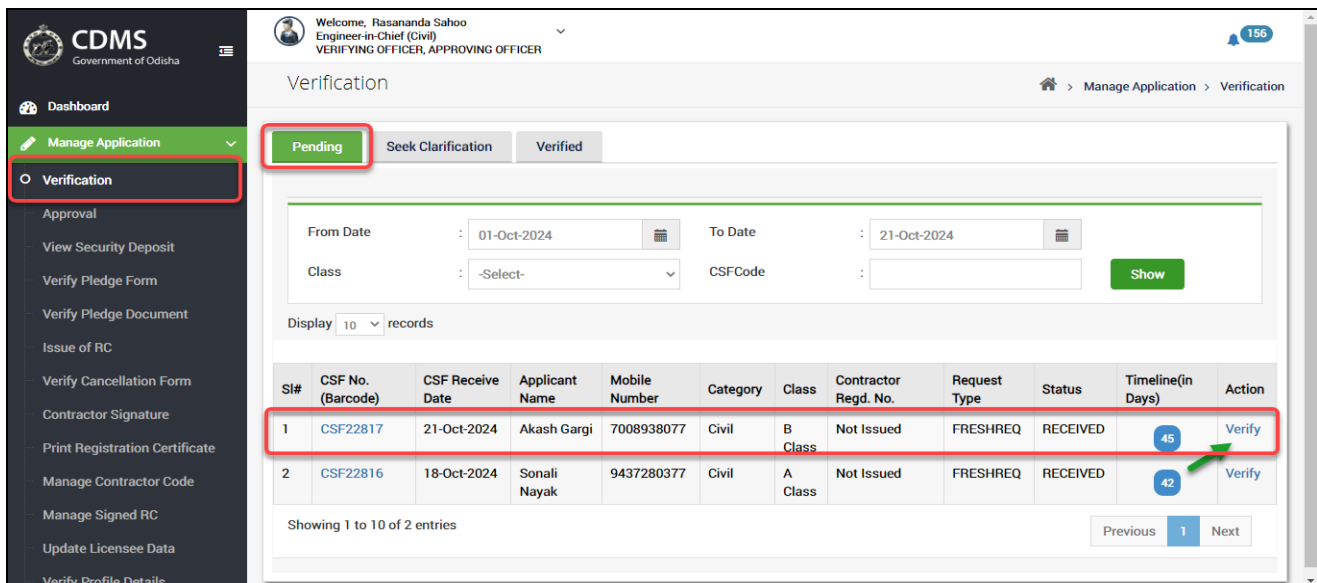
Figure 4-3 Token Password

- Enter the token password, and click on the **Submit** button.

- On successful submission, the DSC registration is completed successfully.

4.2 VERIFICATION

After the new contractor registration application is received, the next step is to verify the application details under the Verification tab, created under the manage application menu tab.

Figure 4-4 Verification Screen (1)

On clicking the Verification tab, the applications received on behalf of the new contractor for issuing the license are shown. View the CSF number, CSF receiving date, applicant name, contact details, class, category, etc.
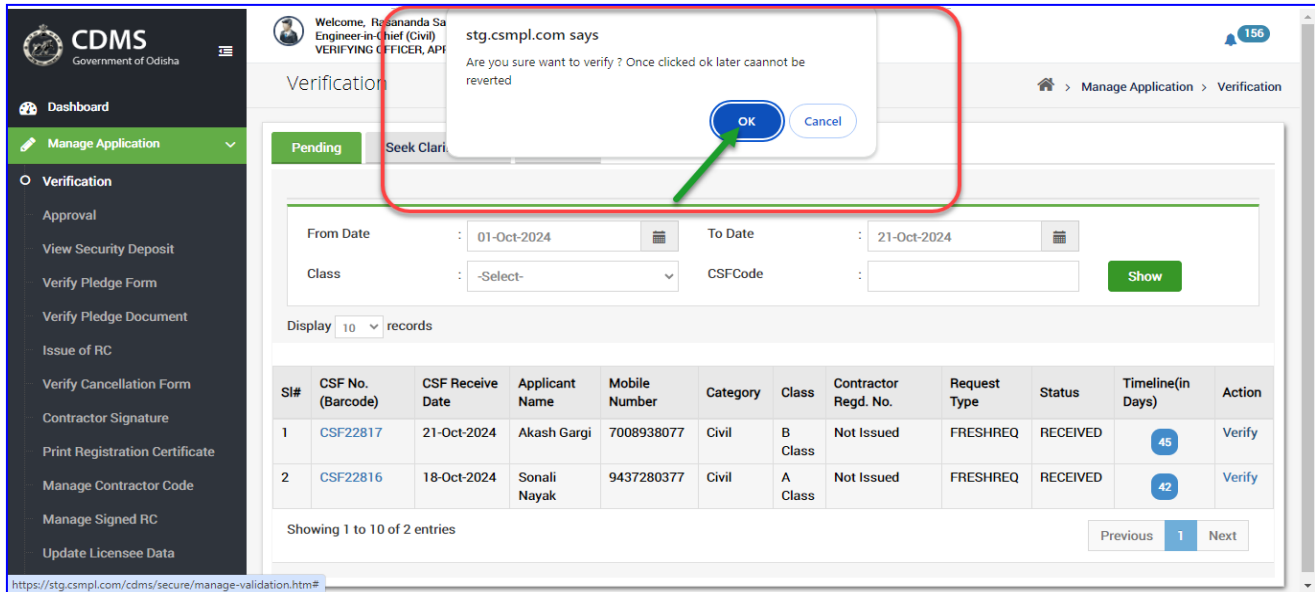
The system also has the provision to filter the tagged results. For doing so, enter the CSF receiving from date and to date, barcode and current status in the search and click on show button.

The application can be either kept on hold or verified. In case kept on hold, then action can be taken against the application later on.

To view the application details, click on the CSF Number provided here.

For verifying the application details click the **Verify** option,

Figure 4-5 Alert Screen

The system gives an alert message – Are you sure you want verify the details? If sure, then click OK.

Doing so, the verifier is redirected to the Basic information screen of the applicant as shown below-
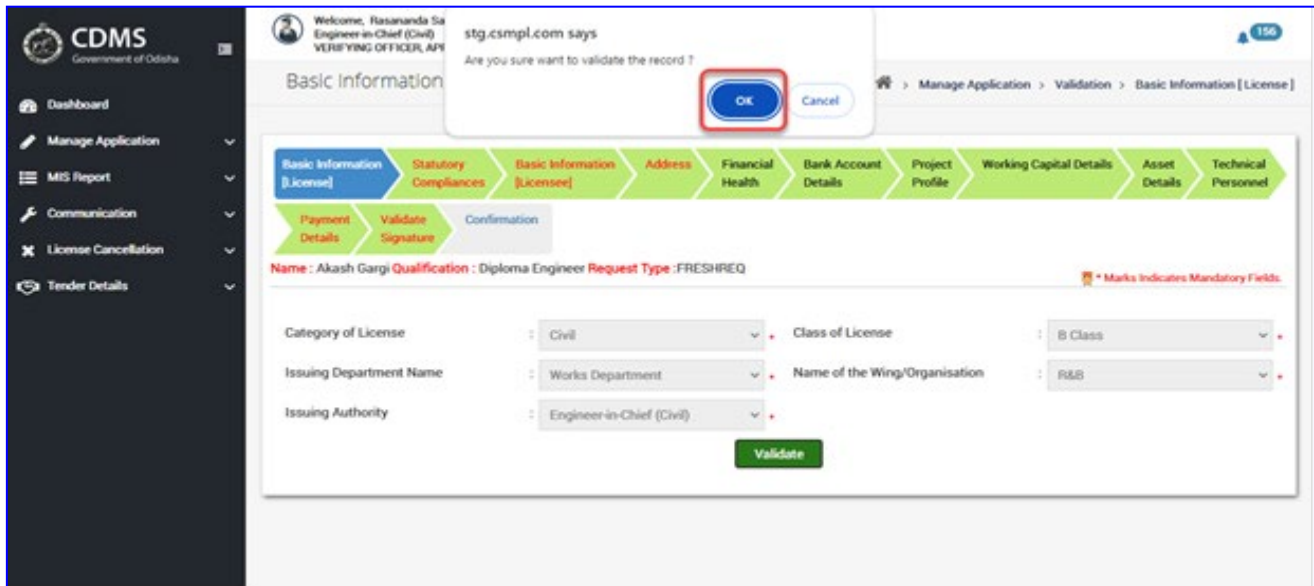
Figure 4-6 Basic Information of License Validation Screen

The basic information of the license can be either validated, if everything found to be correct.

It can be emailed, if any correction is needed to be done. In that case, sent an email then action can be taken against the application later on.

For validating the application details, click the **Validate** button.

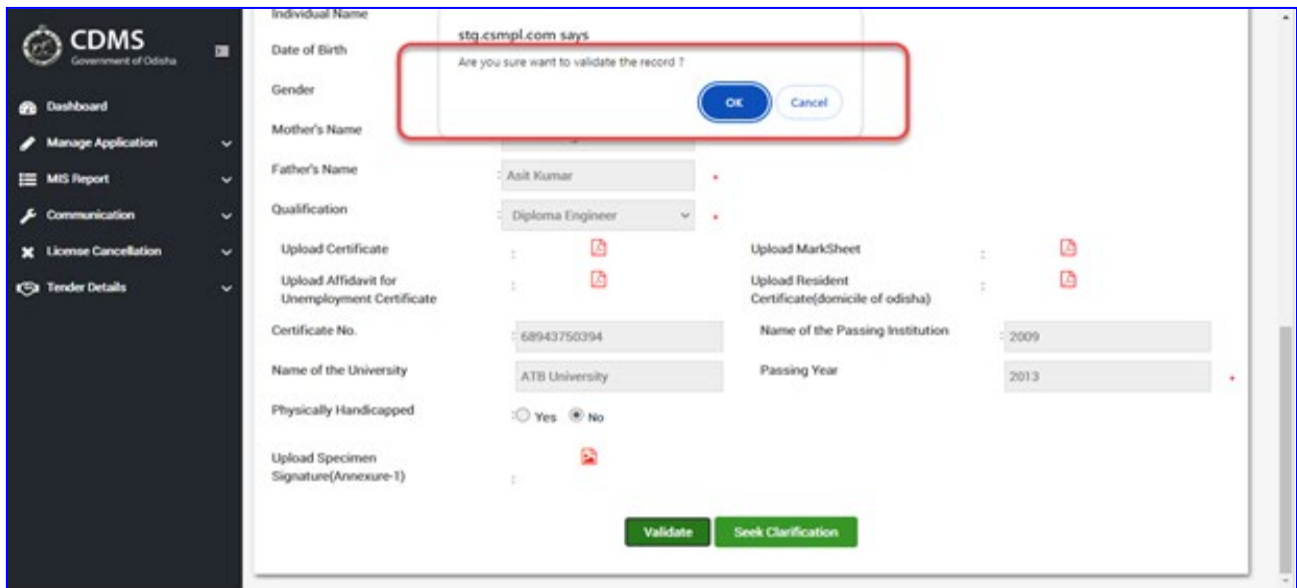**Figure 4-7** Confirmation Window

The system gives an alert message - Are you sure to validate the details?

If sure, then click OK. Otherwise, choose the Cancel button and return to previous screen.

Doing so, you need to validate the Statutory Compliance Details of the Licensee by clicking it.
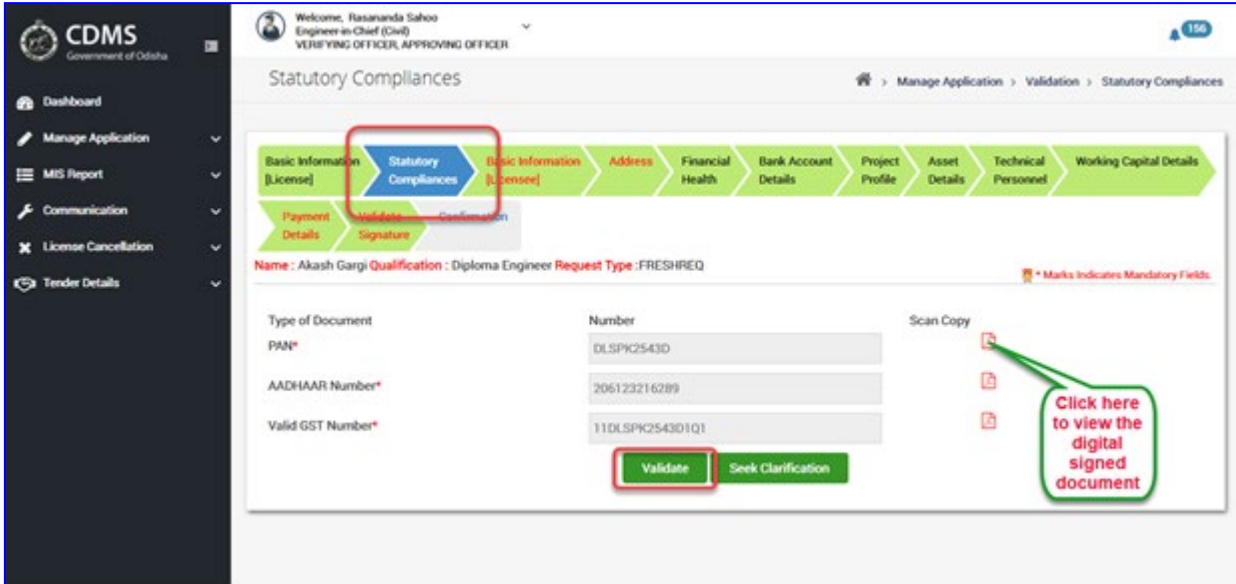
Figure 4-8 Statutory Compliances Validation Screen
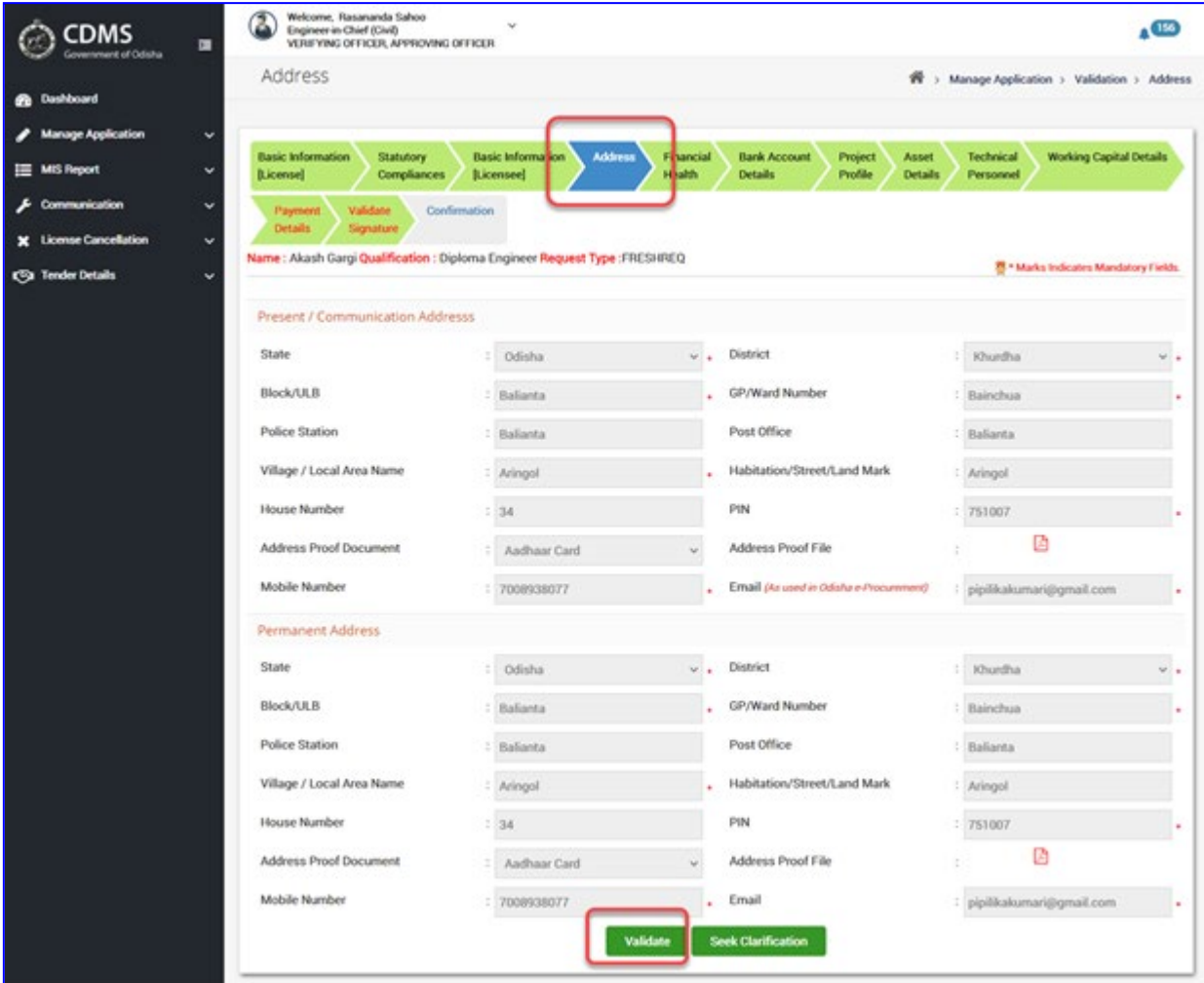
The statutory details of the licensee can be either validated or emailed for any correction. In case you send an email, then action can be taken against the application later on.

Click on the pdf icon provided next to the type of document, to download and view the whether the documents uploaded by the contractor is digitally signed or not.
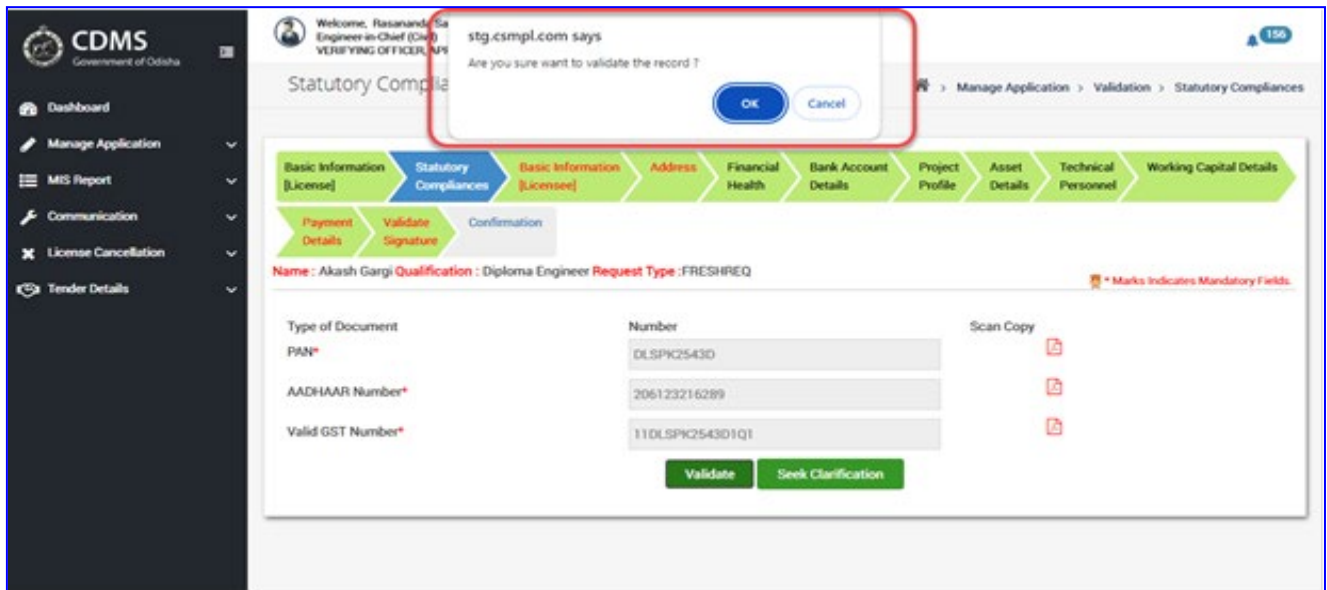
Figure 4-9 Digitally Signed Document Screen

For validating the application details click the **Validate** button.

The system gives an alert message, if you are sure to validate the details or not. If sure, then click OK.

Figure 4-10 Confirmation Alert Message Screen

On validating the statutory compliance status, the buttons for validation and seeking clarification are disabled automatically,

Move forward to validation of Basic Information of the Licensee.

Figure 4-11 Basic Information Licensee Validation Screen

The basic information of the licensee can be either validated or emailed for any correction. In case you send an email, then action can be taken against the application later on.

Click on the pdf icon provided next to the type of document, to download and view the whether the documents uploaded by the contractor is digitally signed or not.

For validating the application details click the **Validate** button.

Figure 4-12 Confirmation Window

The system gives an alert message – Are you sure you want to validate the details or not. If sure, then click OK.

Doing so, you need to validate the Address Details of the Licensee by clicking it.

Figure 4-13 Address Validation Screen

The address details of the licensee can be either validated or emailed for any correction. In case you send an email, then action can be taken against the application later on.

For validating the application details click the **Validate** button.
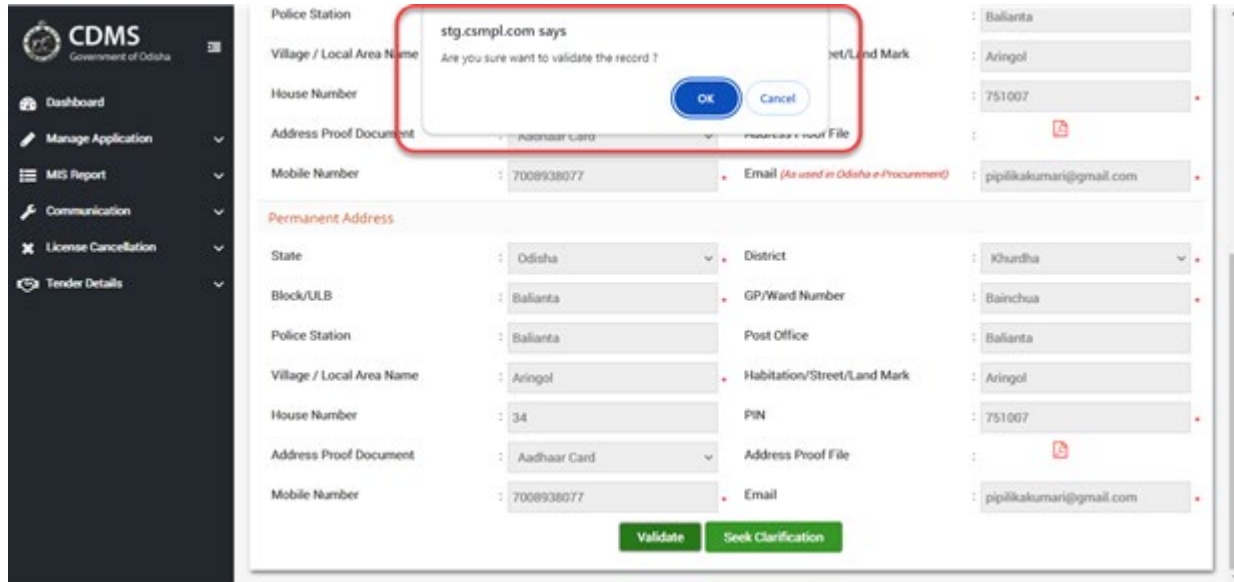
Figure 4-14 Confirmation Alert Message Screen

The system gives an alert message, whether you are sure to validate the details or not. If sure, then click OK.

Doing so, you need to validate the Financial Health of the Licensee by clicking it.
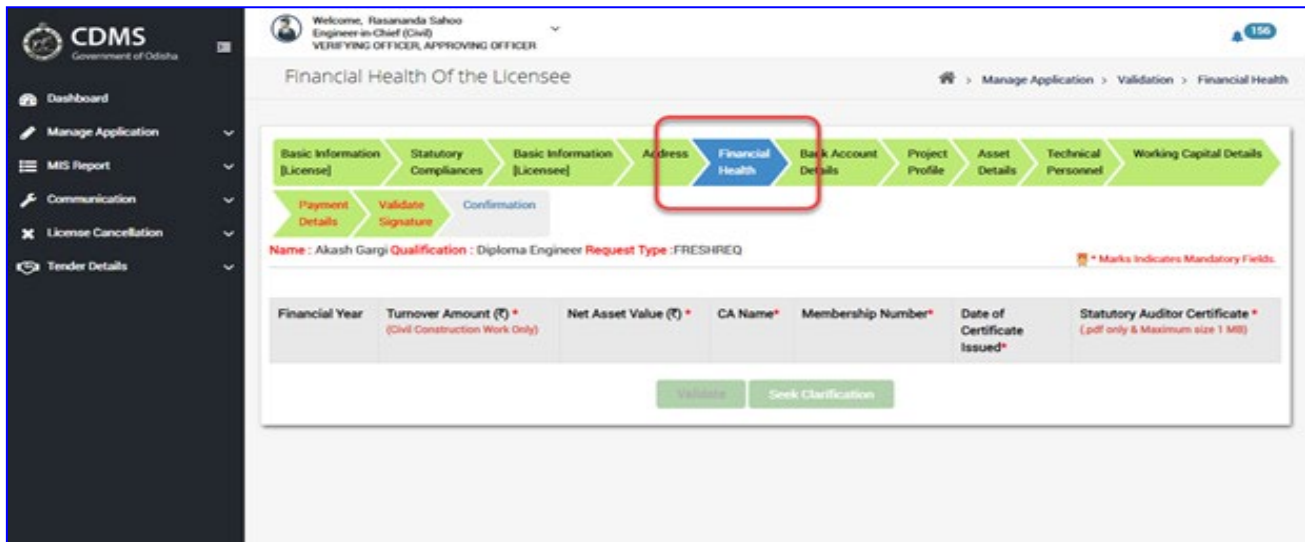
Figure 4-15 Financial Health of Licensee Validation Screen

The financial health of the licensee can be either validated or emailed for any correction. In case you send an email, then action can be taken against the application later on.

For validating the application details click the Validate button.

The system gives an alert message whether you are sure to validate the details or not. If sure, then click OK.

Doing so, you need to validate the Bank Account Details by clicking it.
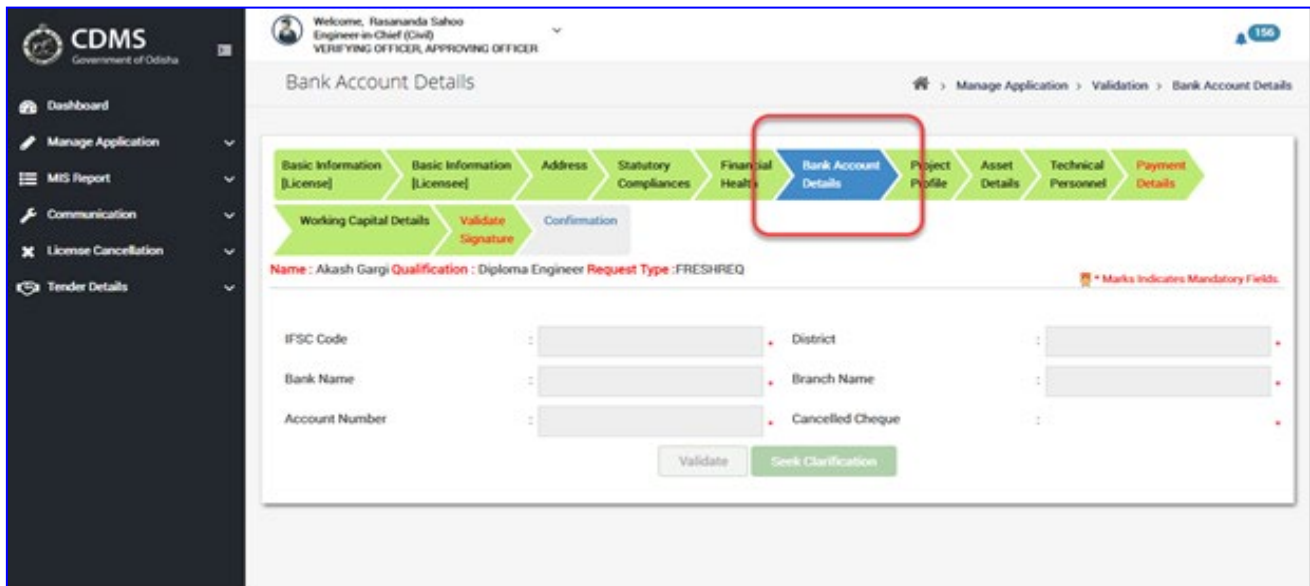
Figure 4-16 Bank Account Details Validation Screen

The bank account details can be either validated or emailed for any correction. In case you send an email, then action can be taken against the application later on.

For validating the application details click the Validate button.

The system gives an alert message whether you are sure to validate the details or not. If sure, then click OK.

Doing so, you need to validate the Project Profile Details by clicking it.
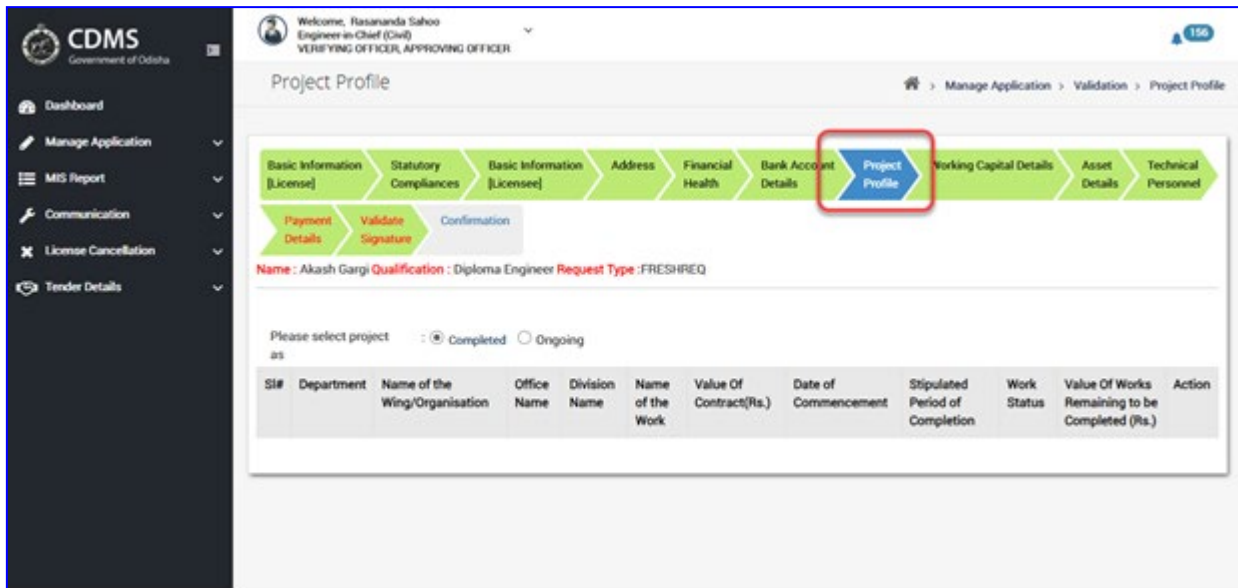
Figure 4-17 Project Profile Details Validation Screen

The project profile details can be either validated or emailed for any correction. In case you send an email, then action can be taken against the application later on.

For validating the application details click the Validate button.

The system gives an alert message whether you are sure to validate the details or not. If sure, then click OK.

Doing so, you need to validate the working capital details.
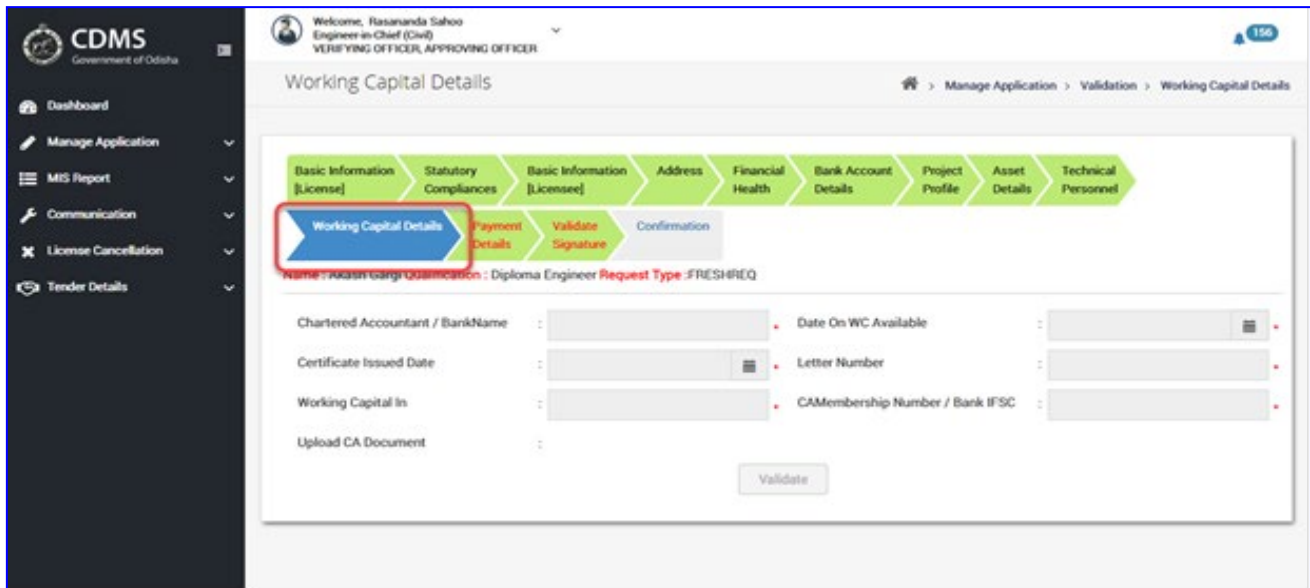
Figure 4-18 Working Capital Details Screen

The working Capital details can be either validated or emailed for any correction. In case you send an email, then action can be taken against the application later on.

For validating the application details click the **Validate** button.

The system gives an alert message whether you are sure to validate the details or not.

Doing so, you need to validate the payment details.

Figure 4-19 Payment Details Validation Screen

The payment details can be either validated or emailed for any correction. In case you send an email, then action can be taken against the application later on.

For validating the application details click the Validate button.

The system gives an alert message whether you are sure to validate the details or not.

Figure 4-20 Confirmation Alert Message Screen

If sure, then click **OK** button.

Doing so, you need to validate the signature of the contractor.

Figure 4-21 Validate Signature Screen

- Crop the full signature of the contractor.

- Click on **Select the Full Signature**.
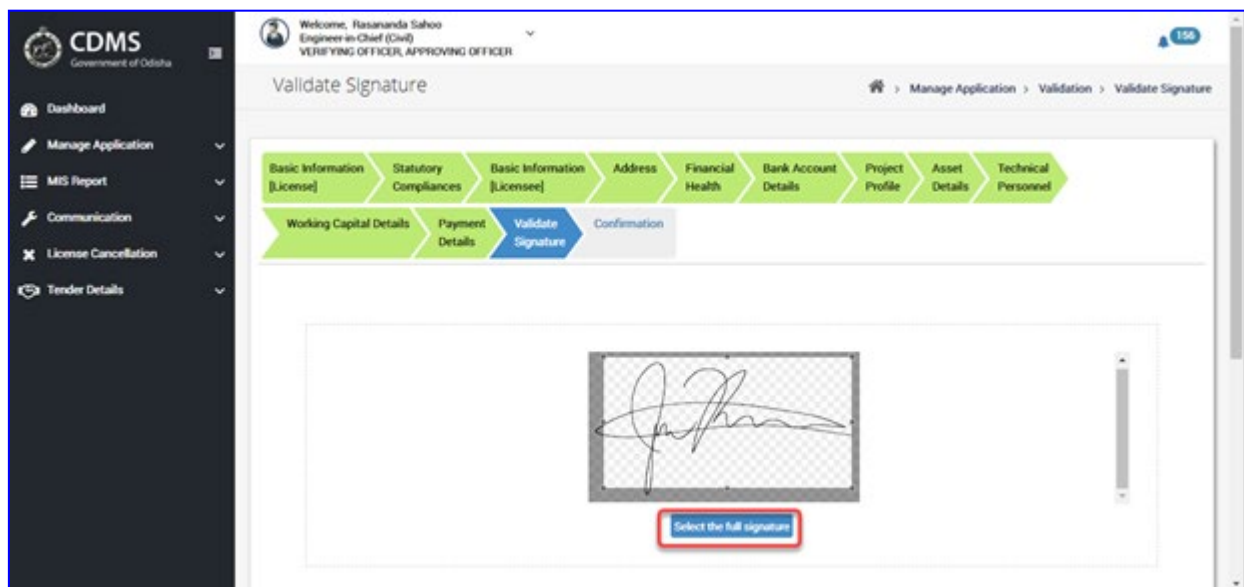
Figure 4-22 Validate Signature Screen

Figure 4-23 Validate Signature Screen

- Refer to the highlighted section.

- Click on **Select the Short Signature** button.

Doing so, you need to confirm and Validate the signature by clicking the **Validate** button.

With the validation of the licensee details, the user needs to do the final confirmation.

Figure 4-24 Validation Confirmation Screen

The details under the respective sections are displayed in the Confirmation section.

- To confirm all the verification data, click on the **Verify** button shown in the shared screen above.

  - o In case you want to reverify or ask for further clarification of the information, select the **Ask for Further Clarification** button. Add remarks for the action taken and then submit the same.

Figure 4-25 Add Remarks Screen

- In case all the details are correct, then click on **Verify** button to approve and complete the procedure.

- The system gives an alert message whether you are sure to validate the details or not. If sure, then click OK.

Figure 4-26 Alert Message Window

Verified application gets listed to the Verified sub-menu tab.

Figure 4-27 Verified Scree
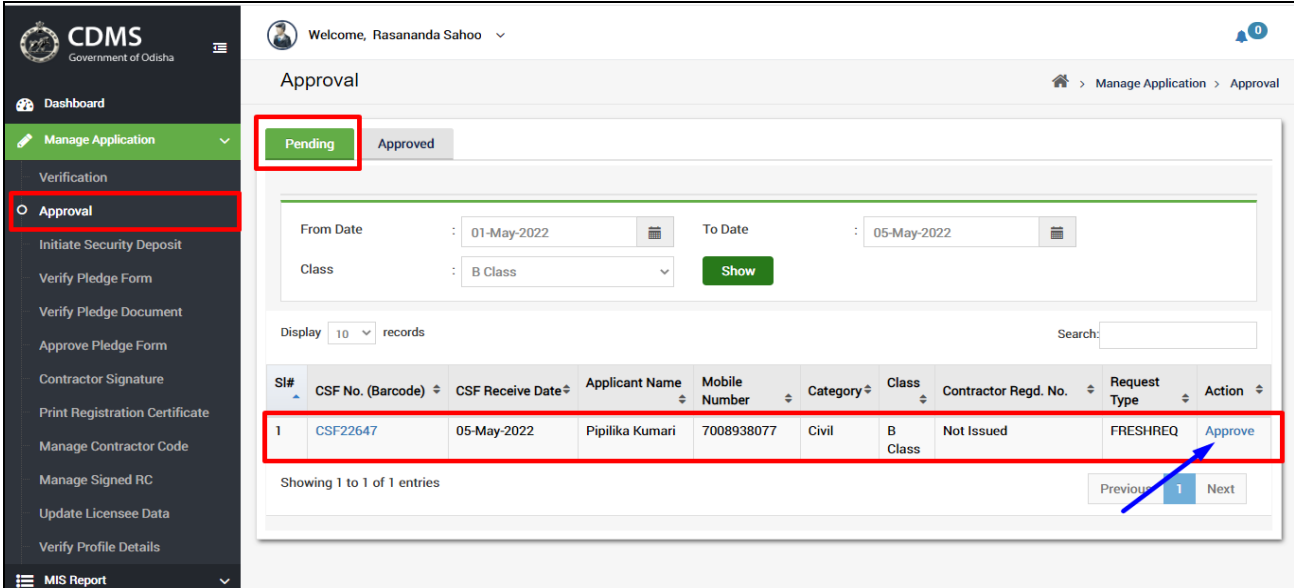
Herein, the CSF Number, CSF Receiving Date, Applicant Name, and other details are displayed in a table.

To check the status of the respective application, use the search panel wherein data can be selected from the respective fields to filter the list.

4.3   APPROVAL

The application after being verified needs to be approved by the respective authority further. Click the Approval primary link to take the requisite action against the application.

Figure 4-28 Approval Screen (1)

In the approval screen displayed, the list of applications approved or waiting for an approval are shown along with CSF number, CSF receiving date, applicant name, mobile number, category, class, contractor's registration number, request type and current status.

In the approval screen displayed, use the Search panel to filter the list and find the respective record.

Figure 4-29 Approval Screen (2)

The respective application's CSF number, CSF receiving date, applicant name and other details are displayed.

- Click the **Approve** button for application approval-

Figure 4-30 Confirmation Window

Choosing the approval option, the system gives an alert message whether you want to approve the application or not.

If you are sure, then click the **OK** button. Doing so, the system will redirect you to the Basic information screen of the applicant-

Figure 4-31 Approval of Basic Information Screen

The data in each section are already validated and approved. Scroll through each page, or click the final i.e. the Confirmation tab.

Welcome, Rasananda Sahoo

Validation Confirmation

🏠 > Manage Application > Validation > Validation Confirmation

Basic Information [License] | Basic Information [Licensee] | Address | Statutory Compliances | Financial Health | Project Profile | Payment Details | Validate Signature | **Confirmation**

Basic Information [License]

Category of License	: Civil	Class of License	: B Class
Issuing Department Name	: Works Department	Name of the Wing	: R&B
Name of Office	: XXXXXXXXX	Issuing Authority Name	: Engineer-in-Chief (Civil)
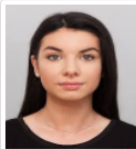
Basic Information [Licensee]

Other than Odisha PWD Contractor ? : No

Have you registered in Local MSE : No

Do you belongs to Start Up : No

Do you belong to Labour Union Cooperative Society ? : No

Category of License	: Civil		
Class of License	: B Class		
License / Ownership Type	: Individual		
Individual Name	: Pipilika Kumari		
Date of Birth	: 31-Dec-1987		
Gender	: Female		
Father's Name	: Asit Kumar		
Qualification	: Other		
Social Category of Licensee	: General	Physically Handicapped	: No
Contractor Code Of Super/Special/A Class Contractor	: 433UN468		

Present / Communication Address

State	: Odisha	District	: Khurdha
Block/ULB	: Balianta	GP/Ward Number	: Bainchua
Police Station	: Balianta	Post Office	: Balianta
Village / Local Area Name	: Aringol	Habitation/Street/Land Mark	: Aringol

42

House Number	: DL-54	PIN	: 751007
Address Proof Document	: Aadhaar Card	Address Proof File	: 📄
Mobile Number	: 7008938077	Email (As used in Odisha e-Proc)	: pipilika.kumari@gmail.com

Permanent Address

State	: Odisha	District	: Khurdha
Block/ULB	: Balianta	GP/Ward Number	: Bainchua
Police Station	: Balianta	Post Office	: Balianta
Village / Local Area Name	: Aringol	Habitation/Street/Land Mark	: Aringol
House Number	: DL-54	PIN	: 751007
Address Proof Document	: Aadhaar Card	Address Proof File	: 📄
Mobile Number	: 7008938077	Email	: pipilika.kumari@gmail.com

Statutory Compliances [Individual Licensee]

Type of Document	Number	Upload Scan Copy (.pdf)
PAN	AAATY4231D	📄
AADHAAR Number	444433332222	📄
GST Number	21AAATY4231D2RT	📄

Financial Health of the Licensee

Financial Year	Turnover(₹) (Civil Construction Work Only)	Net Asset Value(₹)	Statutory Auditor Certificate

Bank Details

Bank Name	Branch Name	Account Number	IFSC Code	Uploaded Cancelled Cheque

Project Profile *(Project Completed on or after 01-04-2011 OR Awarded on or after 01-04-2011 OR Approved prior to 01-04-2011 but still on-going)*

Sl#	Department (A)	Name of the Wing/ Organisation (B)	Other PSU Information (C)	Circle Name (D)	Division Name (E)	Contract Type (F)	Name of the Work (G)	Agreement Number (H)	Agreement Date (I)	Category of Work (J)	Odisha e-Pro Tender ID (K
1	Rural Development Department	RWSS		Balasore Circle	Bhadrak Division	Item Rate/Percentage Rate	Road Construction	AAB2345TY/23	2021-05-06	Roads , Tunnel , Spillway	WA234578T

Sl#	Date of Commencement (M)	Stipulated Date of Completion (N)	Work Status(As on 30-Sep-2016) (O)	Work Execution Certificate	Actual Date of Completion (P)	Executed Amount (Till 30-Sep-2016) (Q)	The work order has litigation (R)					
							Type of Litigation	Amount(₹)/Others	Forum	Case Number	Year of Filing	Present status of the case
1	2021-12-01	2022-12-31	Ongoing	Not Available	2022-12-31	500,000	on	400,000	Conciliation			

Figure 4-32 Approval Confirmation Screen

- On verifying details under the respective sections, you need to Approve all the details made by clicking the **Approve** button shown in the shared screen above.

- In case you want more clarification on the details, select the **Revalidate** button shown in the Approval Confirmation screen shared above.

Click the Approve button to complete the procedure.

Figure 4-33 Confirmation Alert Screen
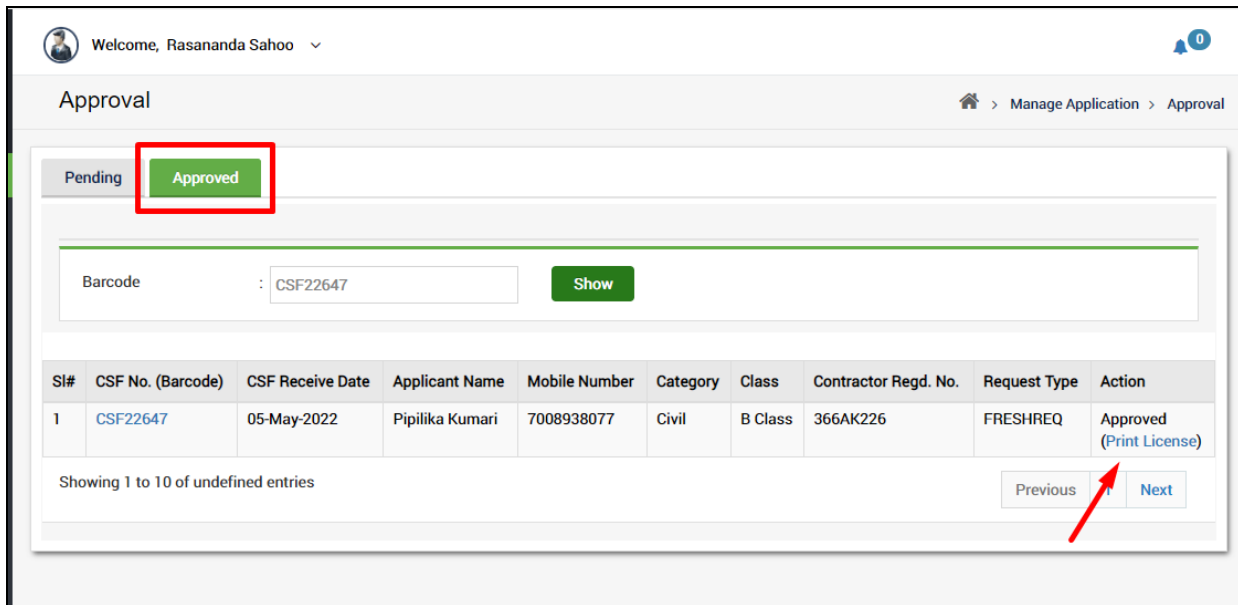
Choosing the **Approve** option, the system gives an alert message whether you want to approve the application or not.

If you are sure, then click the OK button.

Doing so, get redirected to the **Approved** section where the list of approved application is displayed with option for printing the license copy.

Enter the Barcode Number and click Search button to filter the results and view the approved request status. Refer Figure shown below –

Figure 4-34 Approved Application Screen

In **Fig. 4-34**, newly approved CSF number is shown with receiving date, mobile number and other details.

Click on **Print License** button for taking a print-out of the certificate of registration, once after the security deposit is initiated.
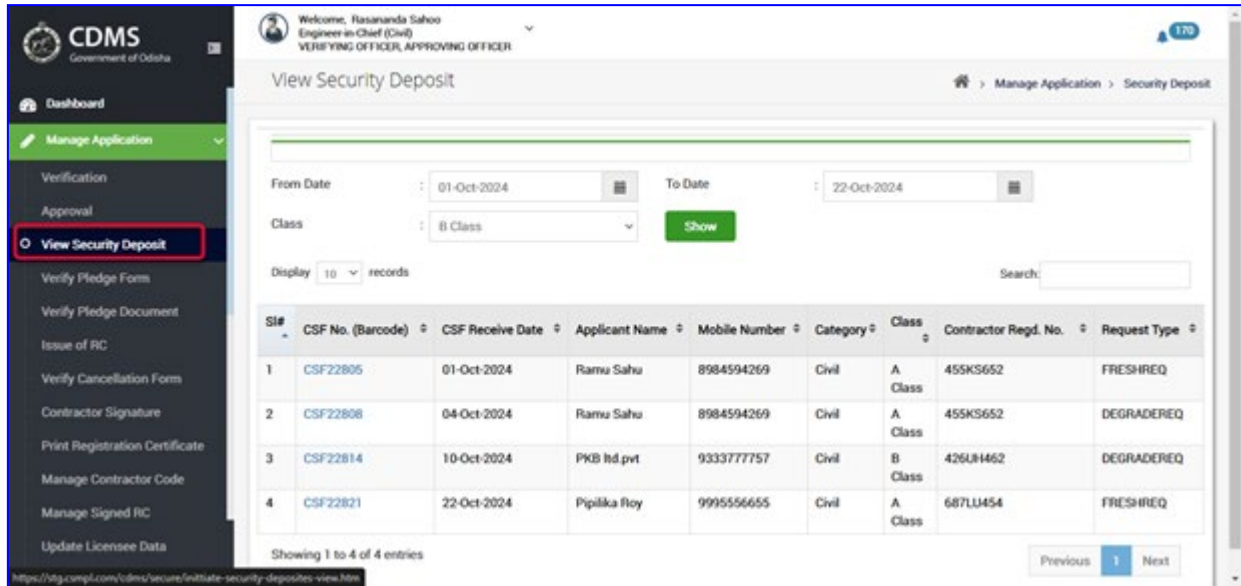
After the contractor application is approved, the respective contractor can login to his/her account with the credentials as already created.

The newly registered contractor can login as an existing contractor.

4.4   VIEW SECURITY DEPOSIT

After approval of the license for the new contractor, security deposit for the issue of license for the respective contractor is auto initiated.

Figure 4-35 Verify Security Deposit Screen

4.5   VIEW PLEDGE FORM

After the Contractor User submit the Pledge Form, the LIA user needs to verify and validate the security deposit submitted. The LIA user can view the Pledge Form pending for an action in this section.

Figure 4-36 View Verify Pledge Form Screen

- View the list of Pledge Form pending for validation in this section, with the Contractor Name, CSF Code, Contractor Code, Validation Status, Postal Validation Status, Sum (Amount) and Take Action button.

- To view and download the document uploaded, click on the pdf icon.

- To take action i.e. approve or reject the Pledge Form, click on the Take Action ( ) button.

On clicking system will navigate to the Verify Pledge Form section.

Figure 4-37 Verify Pledge Form Screen

View the pledge form details submitted by the contractor.

Check all the details and then take action.

- If the information provided are correct, then click on **Forward to Post Office** button and validate the Pledge Form.

- Or, to look out for more clarification and send the pledge form back to the contractor for correction click in **Seek Clarification** button.

After clicking the Verify button, a system generated confirmation alert will appear on the display screen.

Figure 4-38 Confirmation Alert Message Screen

- If you are sure you want to verify the details, then click on **OK** button and proceed.

- Or, click on Cancel button and reject the verification.

On confirmation of the first level verification of the Pledge Form is completed and same status can be viewed in the View Pledge Form.
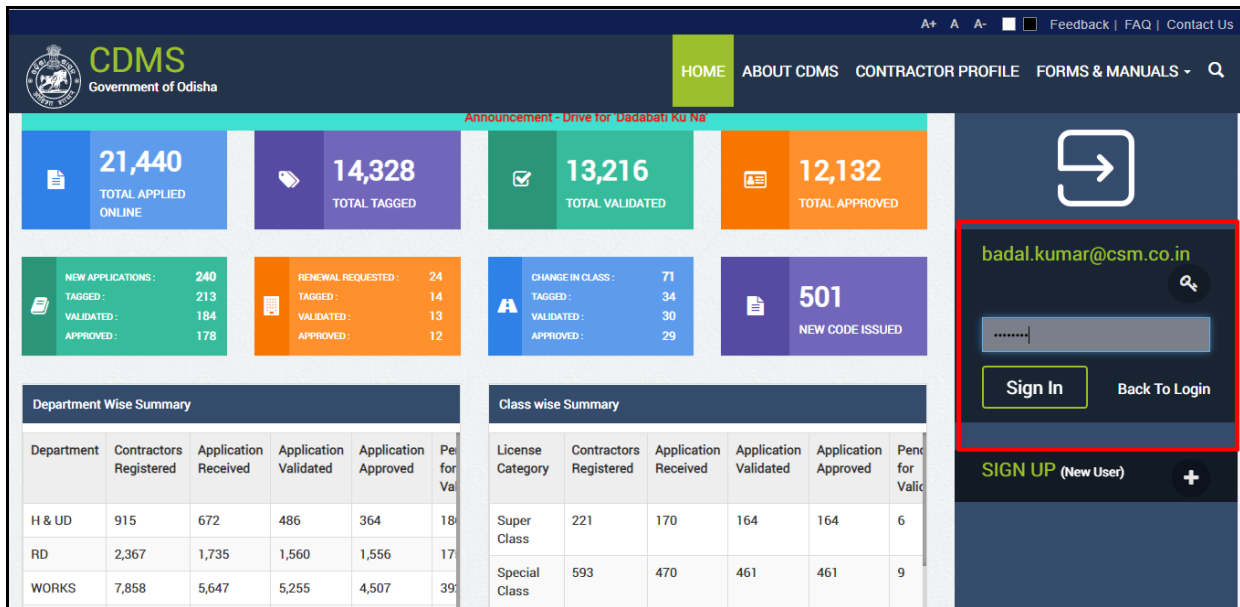
Figure 4-39 View Pledge Form Screen

- Once verified the request moves to the Postal Authority for Validation.

4.6   PLEDGE FORM VALIDATION BY POSTAL AUTHORITY

The Postal Authority is authorized to validate the Pledge Form, once the LIA user verifies and validates the application. To view the Pledge Form and take action, the Postal Authority needs to login into the application with respective User ID and Password.

Figure 4-40 Home Screen - Postal Authority User

On successful login, system will navigate to the dashboard section.

Figure 4-41 Postal Authority Login - Dashboard Screen
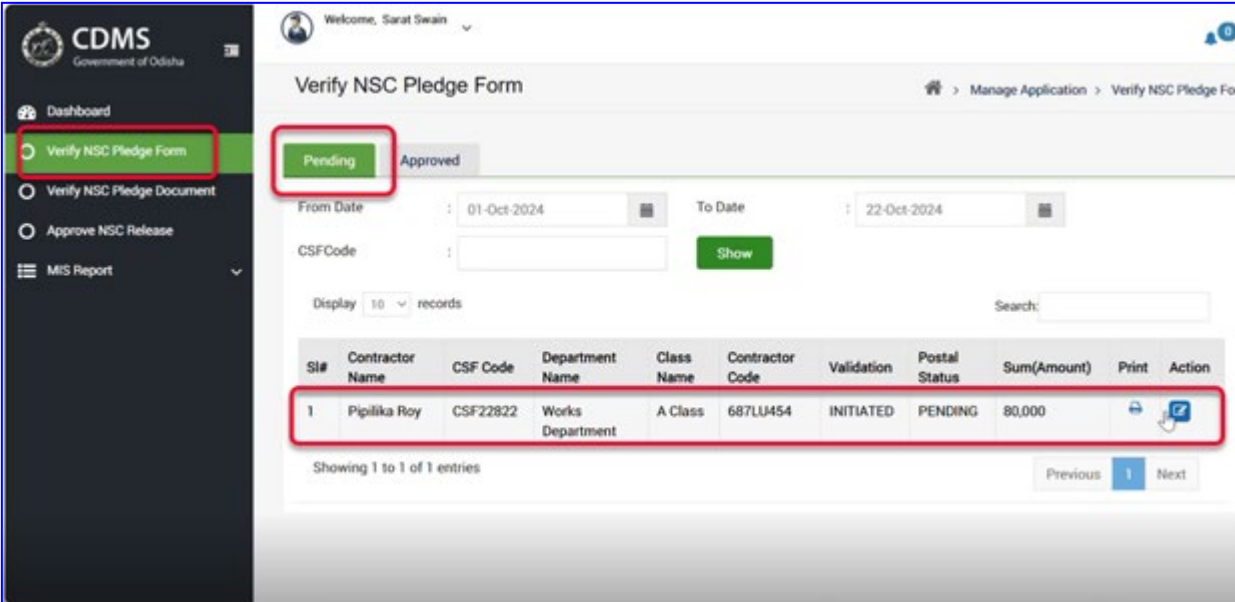
The dashboard shows the total count of Pledge Form Completed their First level of Verification and Number of Pledge Document to be Verified.

The Department and Class Wise Data are displayed in table.

Links to menu and sub-menu tabs are provided on the left hand side.

4.6.1 VERIFY NSC PLEDGE FORM

View the list of NSC Pledge Form pending for verification at the Postal Authority end by clicking the **Verify NSC Pledge Form** link.

Figure 4-42 Verify NSC Pledge Form Screen - Postal Authority User

Refer to the Figure 4-42 shown above, herein list of Pledge Forms pending for validation are given with Contractor Name, CSF Code, Department, Class and other details.

- To take action i.e. Verify or Reject the Pledge Form, click on the **Take Action** button for the respective Pledge Form details shown in the table.

On clicking system will redirect to the Validation section.

Figure 4-43 Validate Pledge Form – Postal Authority User Screen

View the pledge form details submitted by the contractor.

Check all the details and then take action.

Figure 4-44 Validate Pledge Form – Postal Authority User Screen

- If the information provided are correct, then click on **Validate** button and validate the Pledge Form.

- Or, to look out for more clarification and send the pledge form back to the contractor for correction click in **Seek Clarification** button.

After clicking the Validate button, a system generated confirmation alert will appear on the display screen.

Figure 4-45 Confirmation Alert Message Screen - Postal Authority User
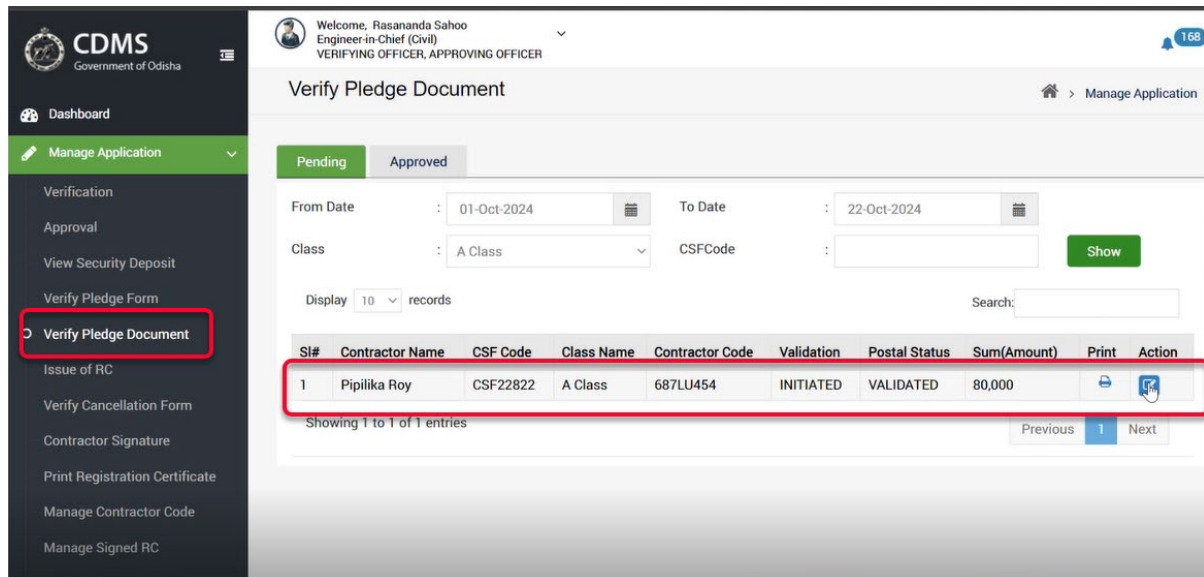
- If you are sure you want to verify the details, then click on **OK** button and proceed.

- Or, click on Cancel button and reject the verification.

On confirmation of the Pledge Form Validation at the Postal Authority end is completed and moved to the Contractor User to upload the Pledge Form Certificates.

4.7 VERFIY PLEDGE DOCUMENT

On uploading the Pledge Form Certificates by Contractor, the LIA user needs to verify the document submitted. For doing so, login into the application as LIA user using respective user credentials. On sucessful login, go to Verify Pledge Document link under Manage Application to view the pending list of Pledge Document.

Figure 4-46 Verify Pledge Document Screen - LIA User

- View the list of Pledge Document pending for validation at the LIA User end, with their Contractor Name, CSF Code, Class, Contractor Code, Validation Status, Postal Validation Status, Sum (Amount) and Take Action button.

- To take action i.e. verify or reject the Pledge Document, click on the Take Action (▣) button.

On clicking system will navigate to the Verify Pledge Document section.

Figure 4-47 Verify Pledge Document Screen - LIA User

Refer to the screen shared above.

- If the Pledge Document submitted by the Contractor is correct and valid, then click on **Forward to Postal** button and validate it.

- Or, click on the **Seek Clarification** button to revert the pledge document back to the contractor and ask for clarification on the same.

- On clicking the Verify button, a system generated confirmation alert message will populate on the display screen.

Figure 4-48 Confirmation Alert Message Screen - LIA User

- Click on **OK** button to approve the record and procceed.

- Or, click on **Cancel** button to cancel the action taken.

- On sucessful verification of the Pledge Document at the LIA user end, the Postal Authority has to cross verify and validate it.

4.8 VERFIY NSC PLEDGE DOCUMENT BY POSTAL AUTHORITY

The Postal Authority can view the list of NSC Pledge Document pending for Verification and Validation after confirmation from LIA User in the Verify NSC Pledge Document link under Manage Application after logging into the application with respectice User Credentials.
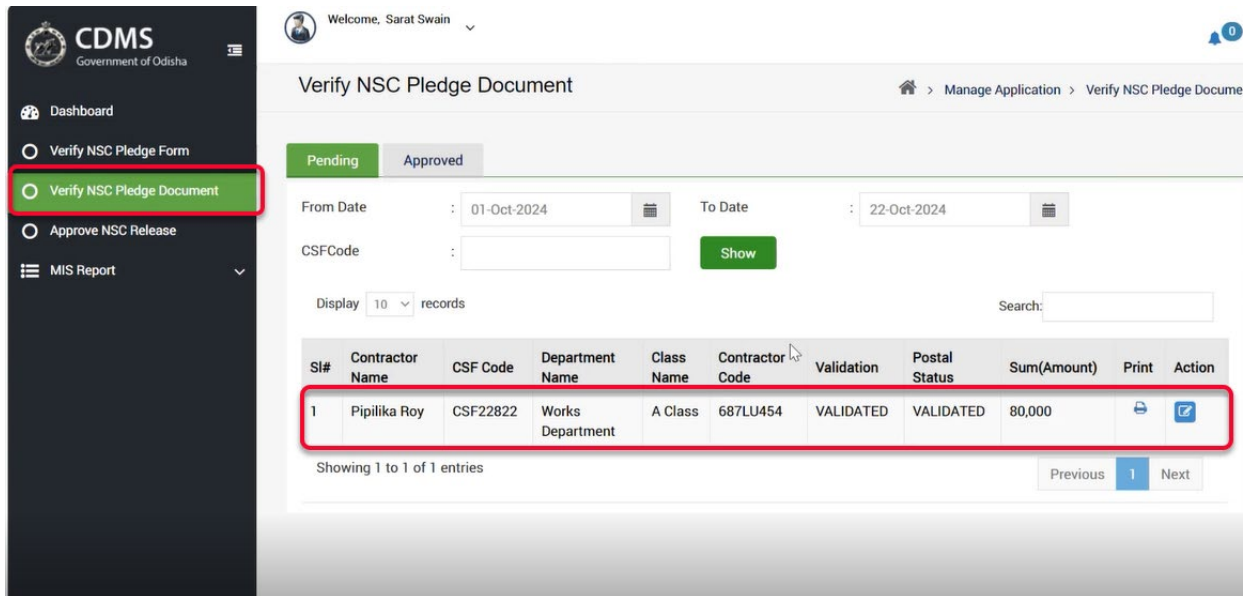
Figure 4-49 Verify NSC Pledge Document Screen - Postal Authority User

Refer to te figure shared above.

- The Verify NSC Pledge Document section displays the list of Pledge Document pending for validation at the Postal Authority end.

- The Name of the Contractor, CSF Code, Department, etc., are displayed in table with take action button.

- To take action i.e. validate or reject the Pledge Document, click on the Take Action (🖉) button.

On clicking system will navigate to the Verify Pledge Document section.

Figure 4-50 Validate NSC Pledge Document Screen - Postal Authority User

Refer to the figure shared above.

- All the details of the Pledge confirmed and approved by the Contractor as well as LIA user are given in this section.

- If the details are correct and valid, then click on **Validate** button.

- o Or, click on **Seek Clarification** button to resend the request to the contractor and ask from more clarification on it.

- On clicking, a system generated confirmation alert message will populate on the display screen.

Figure 4-51 Confirmation Alert Message Screen - Postal Authority User

- Click on **OK** button to approve the record and procceed.

- Or, click on **Cancel** button to cancel the action taken.

On successful validation of the Pledge Document at the Postal Authority end, the request moves to the LIA User for final approval.

4.9 APPROVE PLEDGE FORM

The LIA User is authorized to do the final approval of the Pledge Form, once the Postal Authority approves and validates the Pledge Documents submitted by Contractor.

Doing so, the LIA User needs to login into the application using respective user credentials and go to Approve Pledge Form section under Manage Application to view the list of Pledge Forms pending for approval at the user end. Refer to the screen shared below.

Figure 4-52 View Approve Pledge Form Screen - LIA User

Refer to te figure shared above.

- The section shown above displays the list of Pledge Forms pending for final approval at the LIA User end.

- The Name of the Contractor, CSF Code, Department, etc., are displayed in table with take action button.

- To take action i.e. approve the Pledge Form, click on the Take Action ( ) button.

On clicking system will navigate to the Approve Pledge Form section.

Figure 4-53 Approve Pledge Form Screen - LIA User

Refer to the figure shared above.

- All the details of the Pledge Form confirmed by the designated Postal Authority as well as Contractor are given in this section.

- If the details are correct and valid, then click on **Approve** button and approve the Pledge Form.

- On clicking, a system generated confirmation alert message will populate on the display screen.

Figure 4-54 Confirmation Alert Message Screen - LIA User

- Click on **OK** button to approve the record.

- Or, click on **Cancel** button to cancel the action taken.

Once approved, the LIA User can view the updated status in the View Pledge Form section.

Figure 4-55 View Pledge Form For Approval Screen - LIA User

4.10 ISSUE OF RC

After final approval of the request, the LIA User needs to issue the RC where security deposit is being done by the contractor.

Figure 4-56 Issue of RC Screen - LIA User

- Click on the **Take Action** button for the request pending at the user for RC Issuance.

Figure 4-57 Issue of RC Screen - LIA User

- Click on the **Approve for RC** Button.

- On confirmation only, the Contractor User can download the RC under the Registration Certification section. Do the digital signature of the document and re-upload the document.

4.11 CONTRACTOR SIGNATURE

Upload, edit, crop or manage contractor's signature specimen in the system by clicking the Contractor Signature tab shown in the figure below.

Figure 4-58 Manage Contractor Signature Screen - LIA User

Enter the unique CSF code of the contractor in the textbox shown in front of the barcode option.

- Enter the code and click on Search button.

The respective CSF number's applicant name, mobile number, class, category and other details are shown here. Refer Fig. 4-58.

Upload a specimen of the contractor's signature by clicking the Choose File option shown in Fig. 4-58.
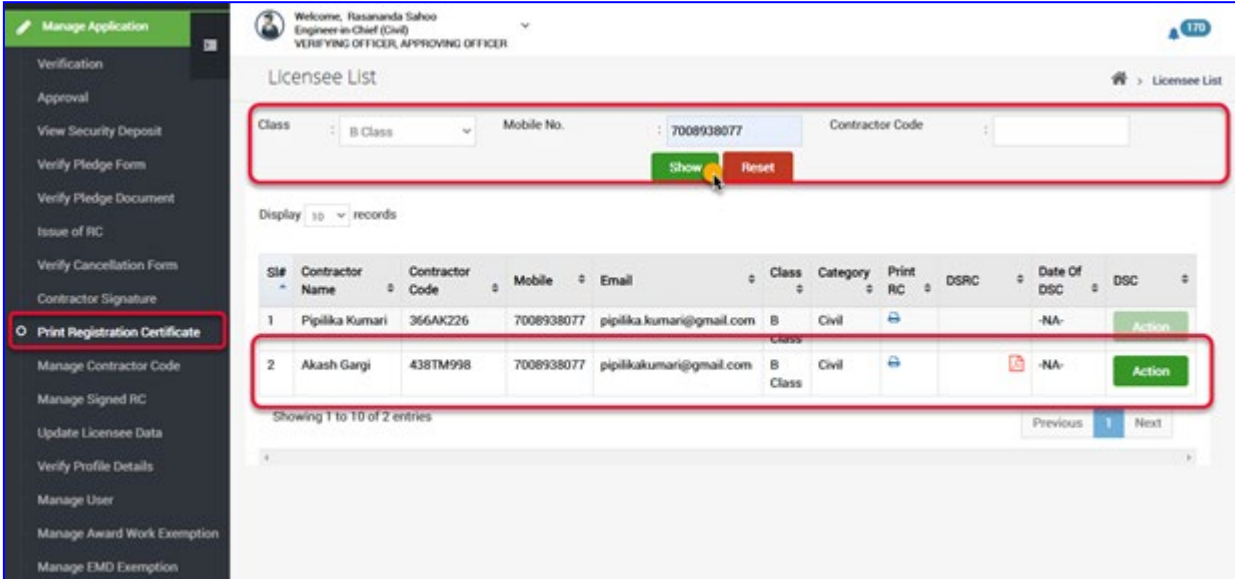
- Select and upload the signature in the system.

- Crop the full signature, if it's necessary by clicking the crop button. Drag the square box that appeared on the signature and adjust the right aspect ratio of the image.

- Crop the cropped full signature.

Once the cropping is done successfully, it gets uploaded to the system.

4.12 PRINT REGISTRATION CERTIFICATE

After approval of the security deposit amount, the contractor can Print the License. Select the Print Registration Certificate tab, as shown in Figure below –

Figure 4-59 Print Registration Certificate Licensee List Screen

The approved and DSC RC Licensee List are displayed in Print Registration Certificate along with contractor's name, code, mobile number, email ID, class, and category for which issued license can be printed.
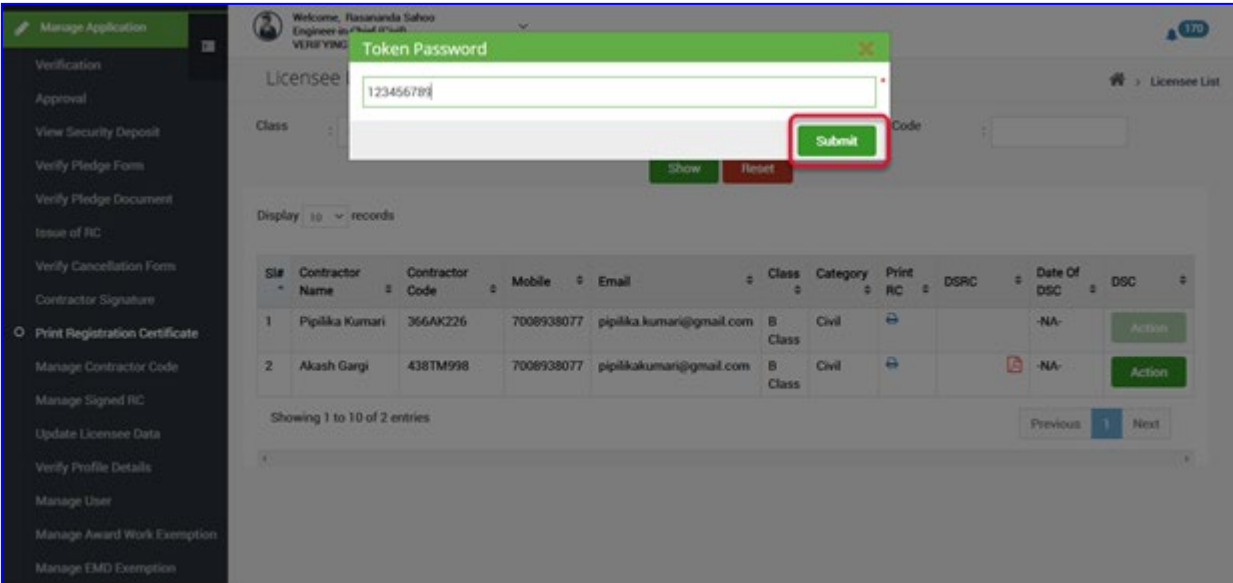
Filter the results by selecting the contractor's class from drop-down and clicking on show. Or, enter the contractor's name, code, or mobile number in the search option to get respective contractor's detail.

User needs to verify the document uploaded. To view the document uploaded, click on the **pdf** icon.

Click on the **Action** button to digitally sign and approve the RC uploaded by the Contractor User.

User needs to provide the token number.

Figure 4-60 Token Number Screen

- Enter the Token Password, and click on the **Submit** button.

Figure 4-61 Information Screen

- Click on the **OK** button to close the confirmation message appeared on the display screen.

Click the **Print RC** button for the selected contractor's name to display the Contractor's Registration Certificate -
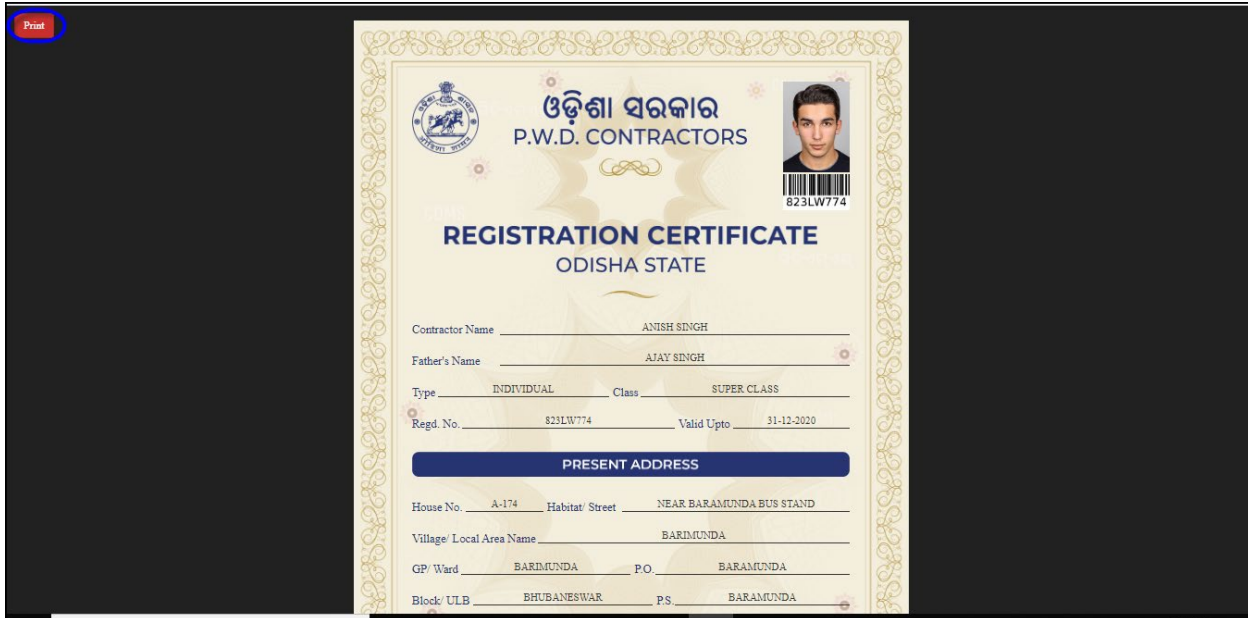
Figure 4-62 Contractor's Registration Certificate Screen

Contractor's Registration Certificate contains all the basic and official details of the contractor.
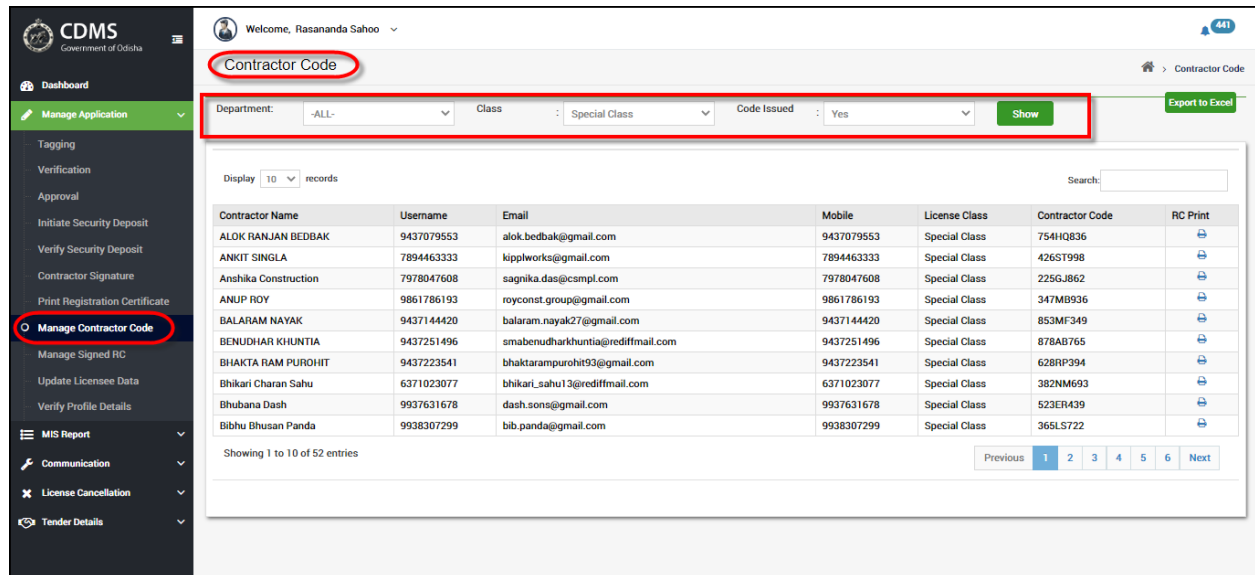
The Certificate displays all the details along with the contractor photo and signature.

Click the Print option to generate printout of the license issued.

4.13 MANAGE CONTRACTOR CODE

The system allows the administrative user to download the list of registered contractor's name, username, email, mobile, class and other details in an excel sheet after filtering them on the basis of department, class type, and code status or keeping the data in a whole by selecting the Manage Contractor Code tab.

Figure 4-63 Manage Contractor Code Screen

Referring to Fig. 4-63 above.
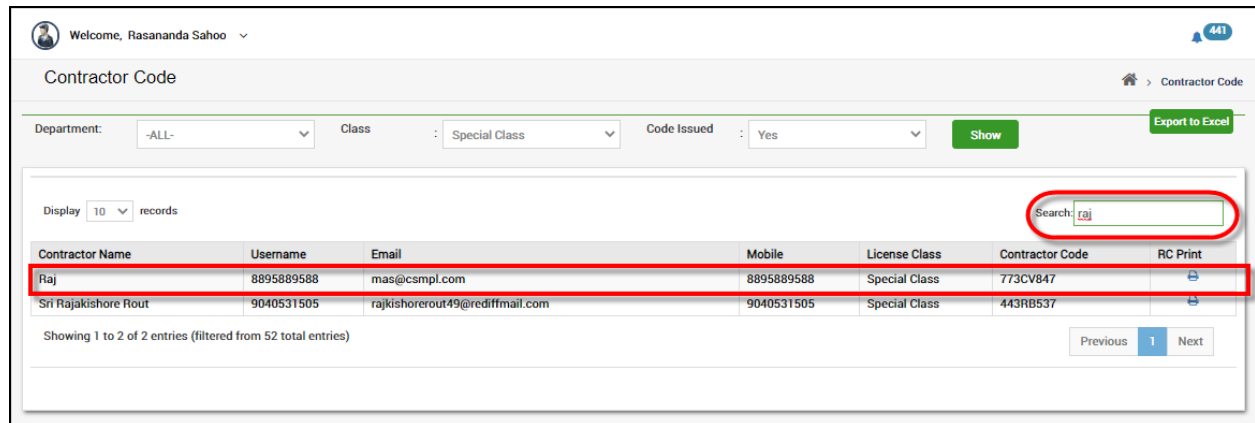
Filter the results by selecting department's name, contractor's class and code issued status. Click on Show button.

List of all the contractors with unique contractor's code and other details appears to the screen. Refer Fig. 4-63

To download the data in an excel sheet, click the Export to Excel button.

Filter an individual contractor's detail by entering contractor's name or code or user name in the search box.

The respective contractor's detail appears to the screen. As highlighted in the shared screen above.

Take a print-out of the RC or Registration Certificate by clicking the print 🖶 icon.

Figure 4-64 Contractor's Registration Certificate Screen
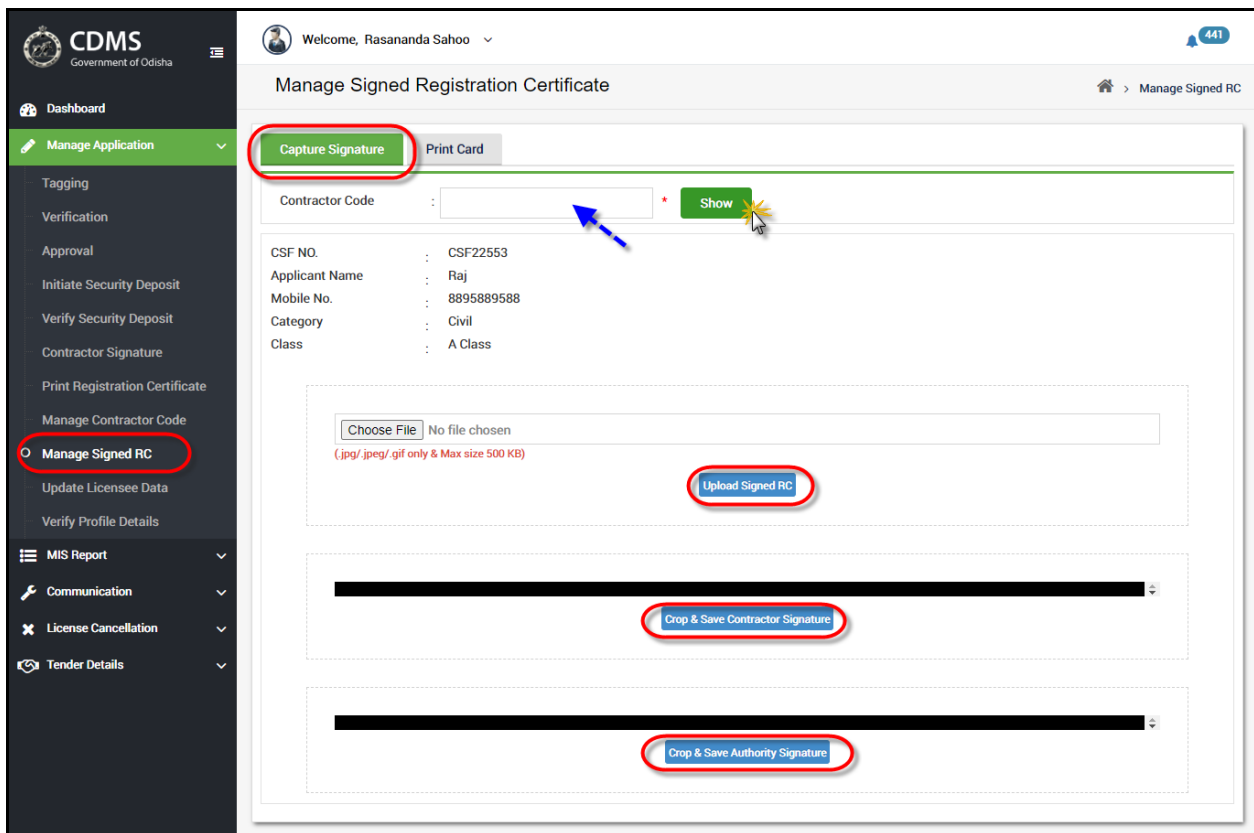
The Certificate displays all the details along with the contractor photo and signature.

Click the **Print** option to generate printout of the license issued.

4.14 MANAGE SIGNED RC

The system allows the administrative user to manage the signed registration certificate by uploading the signed copy of the registration certificate and capture as well as save the image of contractor's and issuing authorities signature in the system. Refer to the screen shared below.

Figure 4-65 Manage Signed Registration Certificate Screen

In Manage Signed Registration Certificate Screen, option for capturing and saving signature of contractor and issuing authority is given under Capture Signature section,

To find applicant details, you need to enter the contractor code and click on **Show** button

On doing so, the respective contractor's CSF number, name, mobile number, category and class displays on the screen.

Option for uploading the signed RC and signature of Contractor's and Authority is shown.

- Choose the signed RC file from your system and upload it.

- Click **Upload Signed RC** button.

The signed RC copy is uploaded successfully to the system. View the uploaded copy in the scrolling down to the Capture Signature screen.

Referring to the screen shared below

Figure 4-66 Registration Certificate Uploaded Successfully Screen
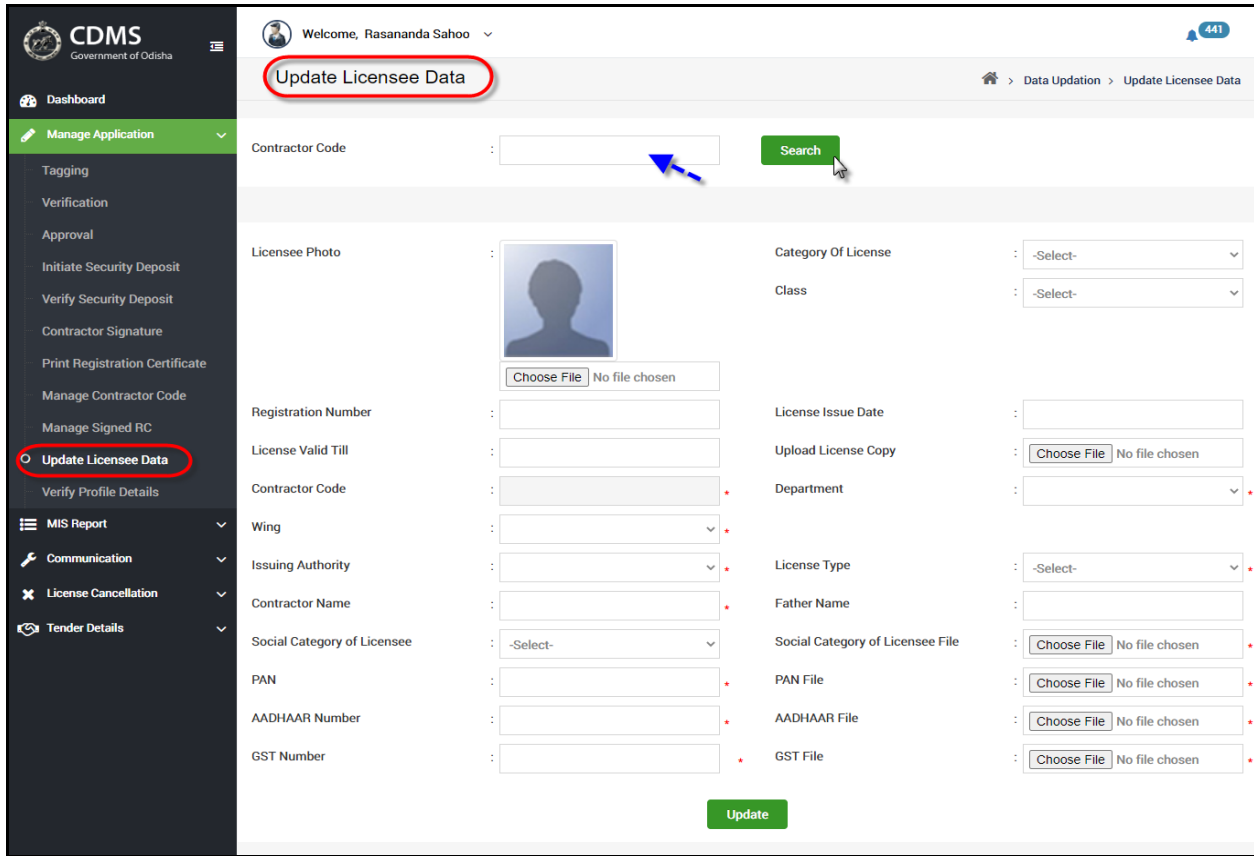
With respect to **Fig 4-66**, crop the contractor's signature and issuing authority signature from the uploaded Registration Certificate.

- Crop the full signature, by clicking the crop button. Drag the square box that appeared on the signature and adjust the right aspect ratio of the image.

- Click on **Crop and Save Contractor/ Authority Signature**.

Once the cropping is done successfully, it gets uploaded in the system.

4.15 UPDATE LICENSEE DATA

If the information provided by the licensee is not satisfactory, then the system provides the facility to modify or change and update the licensee data such as basis information, statutory and other details in the tab encircled in **Fig. 4-67** below.

Figure 4-67 Update Licensee Data Screen

To update licensee data, enter the contractor code in the search box and click on search button.

On clicking, the system will search the respective contractor's data for which an update has to be made.

Refer **Fig. 4-67**.

Enter the details that have be changed and click on update button.

The data changed gets updated to the contractor's profile.

4.16 VERIFY PROFILE DETAILS

To make sure the data filled by the contractor is correct, the administrative user has to verify them by clicking the Verify Profile Details Tab, shown in the figure below.
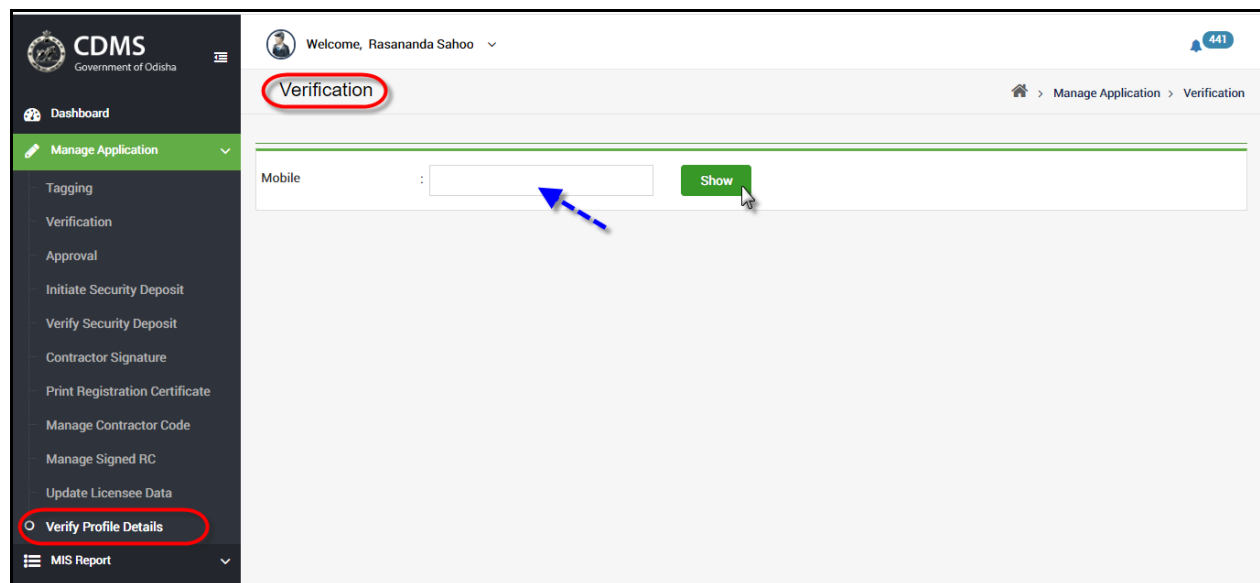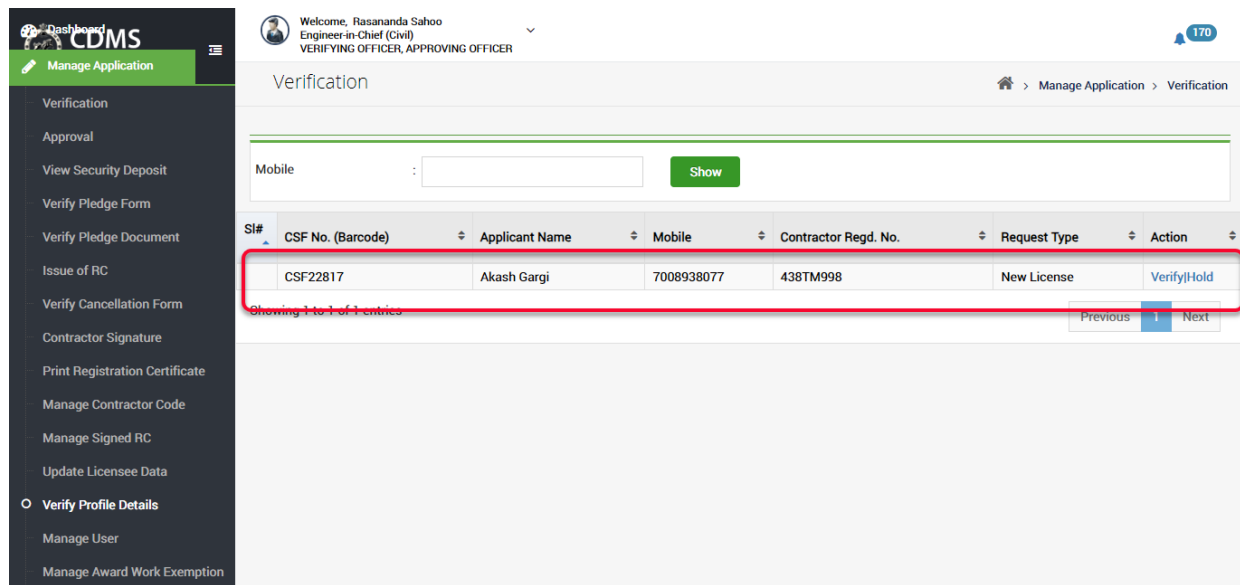
Figure 4-68 Verify Profile Details Screen

Manage all the new contractor's request pending for profile validation here. Referring Verification Screen shown above.

- Enter Contractor's Mobile Number registered with portal.

- Click on **Search** button

79

Doing so, the respective mobile number's profile details appears which you can validate and confirm in this section.
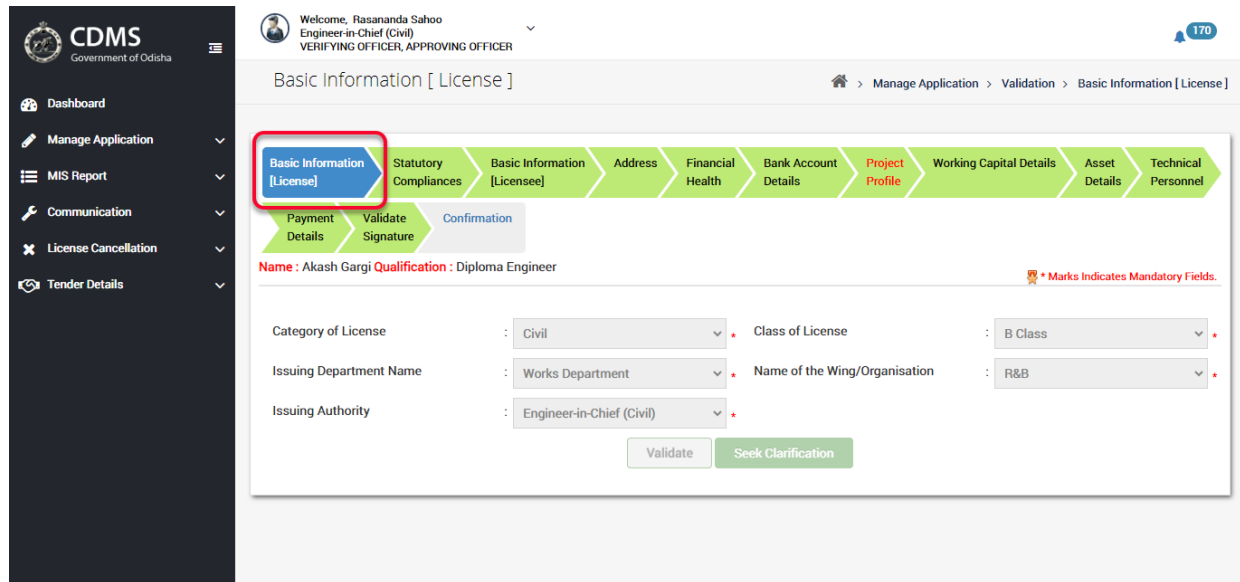
Figure 4-69 Verify Profile Details Screen

For the profile information provided in this section, user has the option to put the profile details on hold or verify.

- To verify the information updated, click on **Verify** button.

- Doing so, a confirmation alert message appears on the display screen. Confirm the action taken.

Figure 4-70 Verify Profile Details Screen

Verify the profile information provided, as already explained above in the document.

Go for validation of the new details updated in the profile.

Figure 4-71 Verify Profile Details Screen

Validate the digitally signed document.

Click on the pdf icon to view the document uploaded.

Check whether digitally signed or not. Then click on the **Validate** button.

Figure 4-72 Verify Profile Details Screen

Here the approval button is disabled, if the user did not completed the the DSC of the document first, or the details updated are not validated.

Go to DSC Registration section again and verify the project document updated.

If already verified, then click on the **Approve** button.

Confirm the action taken.

Figure 4-73 Verify Profile Details Screen

Click on the **OK** Button to close the pop-up message appeared

4.17 BLOCK CONTRACTOR DETAILS

The admin user is authorized to block any contractor details to a period of time under certain circumstances such as not following the Terms and Conditions of Registration, Failed to Submit the Activity Feedback on Time, Fail to Complete Work on Timeline, Complaints, etc.
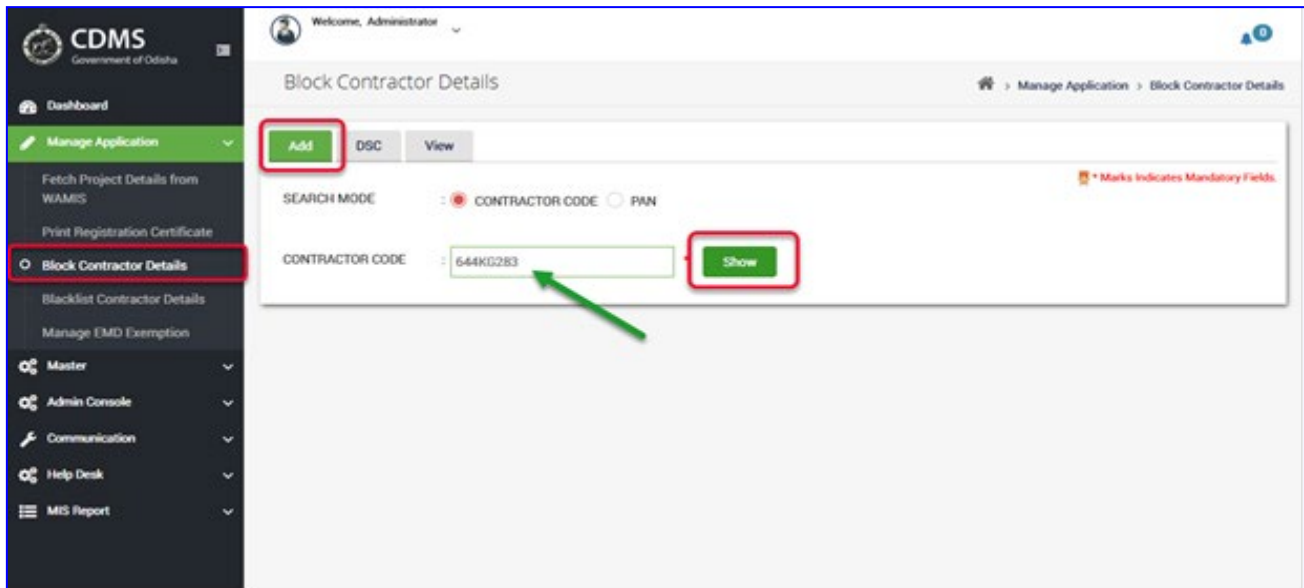
Figure 4-74 Add Block Contractor Details Screen

Refer to the screen shared above.

- In the Add section of Block Contractor Details, enter the Contractor's Code or PAN Number in the textbox to whom you want to block and then click on **Show** button.

- On clicking the Show, a confirmation alert message appears on the display screen.

- Confirm the action to be taken and proceed to detailed information about the Contractor will populate in the add section.
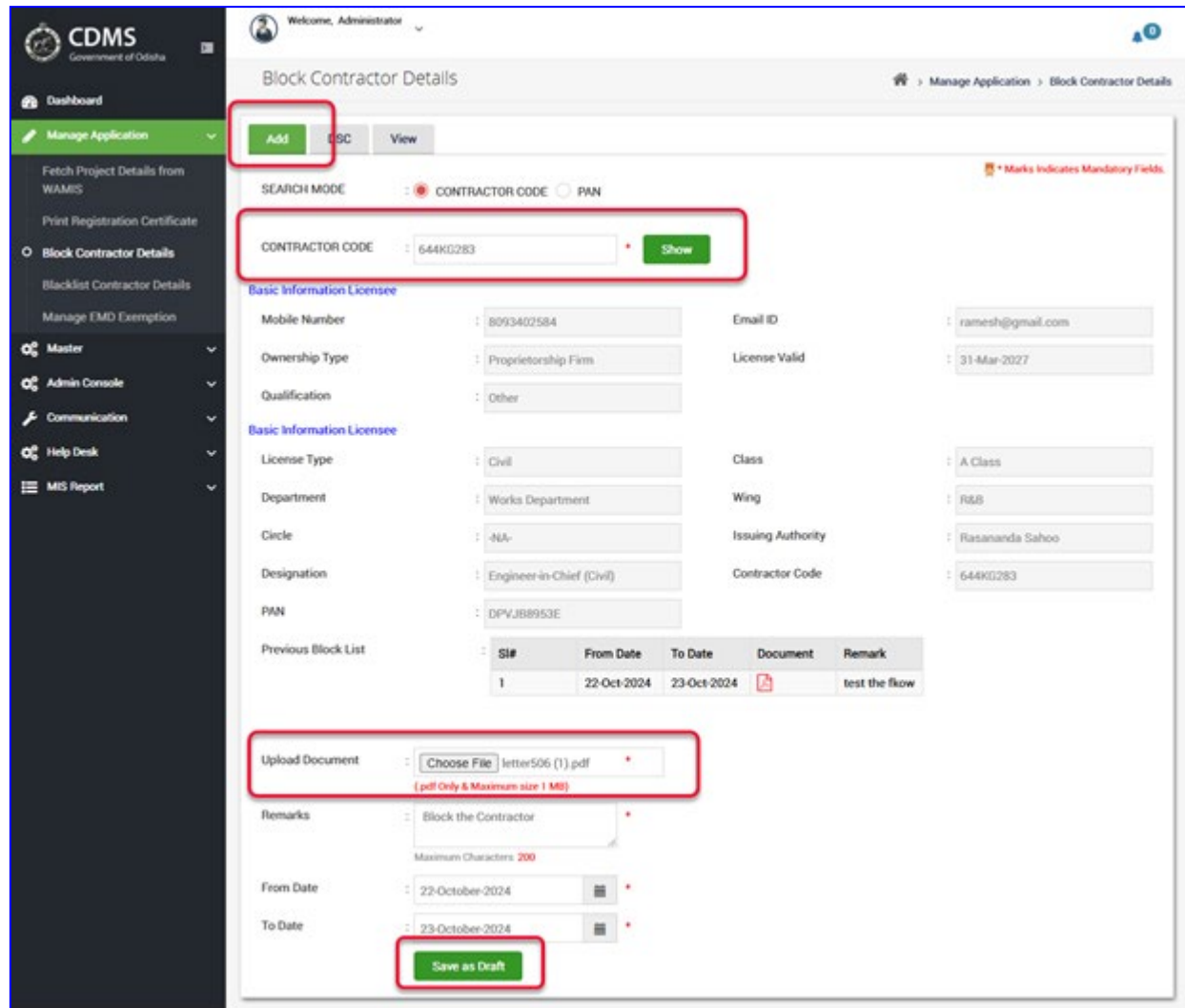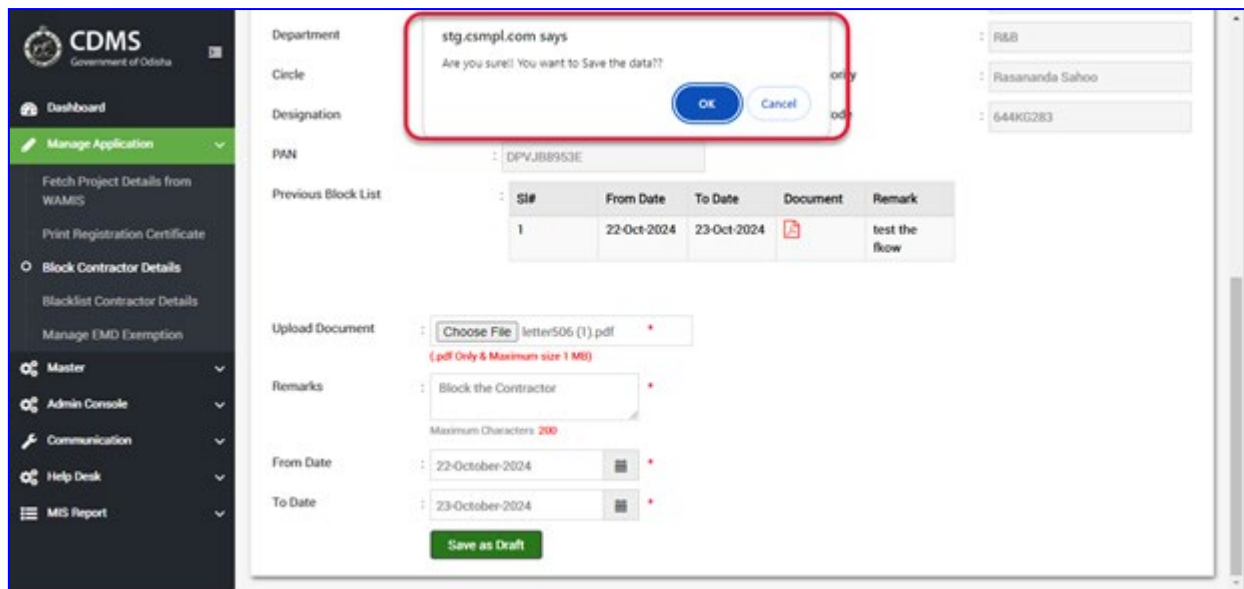
Figure 4-75 Add Block Contractor Details Screen

- Refer to the figure shown above, upload a document in support of the action to be taken.

- Add remarks for blocking the Contractor.

- Select the **From** and **To** Date from the calendar control.

- Click on **Save as Draft** button.

On clicking, a system generated confirmation alert message will populate on the display screen.

Figure 4-76 Confirmation Alert Message Screen

- Click on **OK** button, if you are sure you want to save the data.

  o Or, click on **Cancel** button to cancel the action taken.

On confirmation only, the Contractor Details is blocked and a message displaying the same will also populate on the display screen.
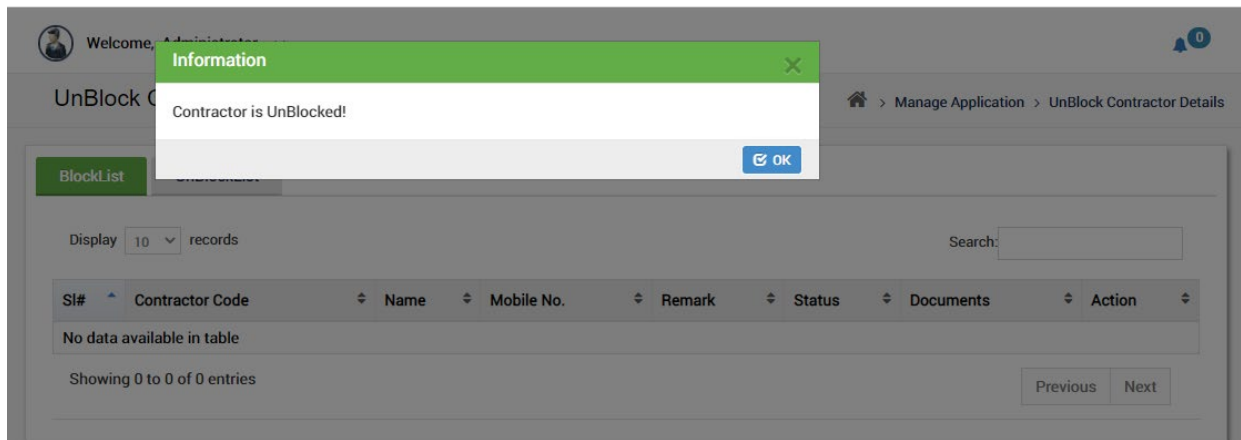
Figure 4-77 Confirmation Message Screen

- Click on the OK button to close the pop-up window appeared.

On successfully taking the action, the Blocked Contractor Code is pending for DSC Certification.
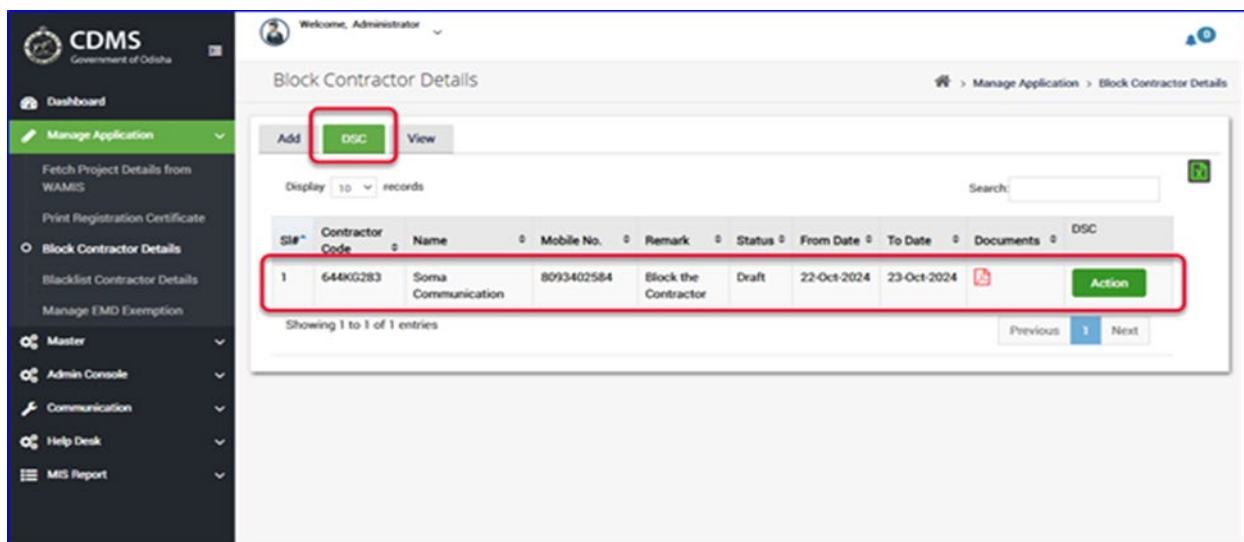
Figure 4-78 Block Contractor Details Screen

- To view the document uploaded, click on the pdf icon.

- To take action. i.e. digitally sign the approval letter for blocking of the contractor id, click on the **Action** (Action) button.
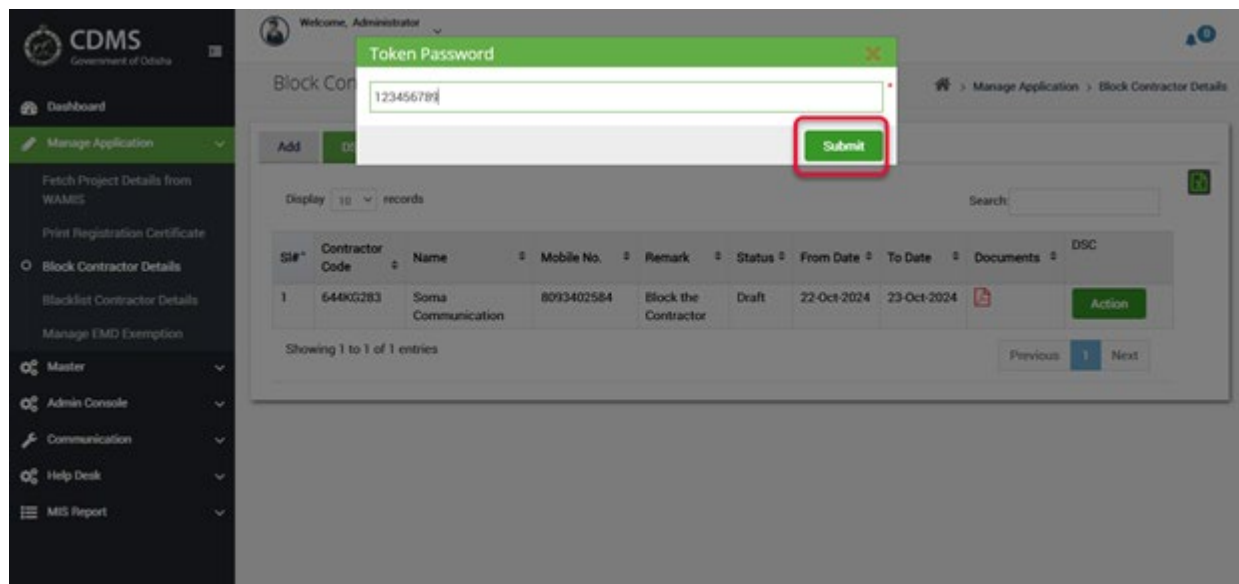
Figure 4-79 Token Password
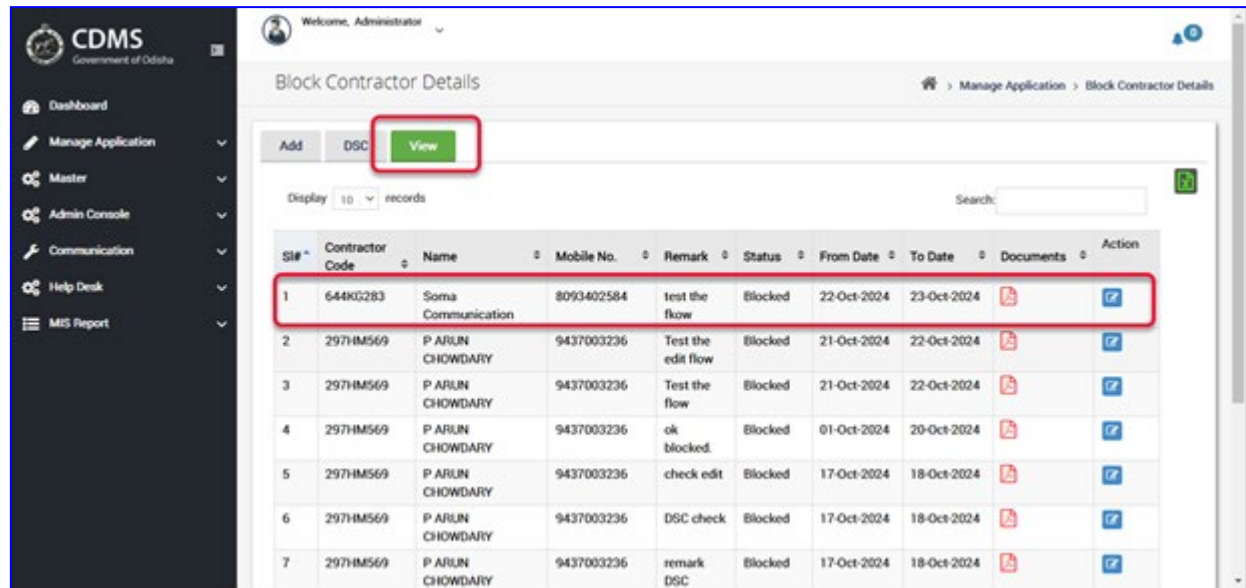
- Enter the token password, click on **Submit** button.

On clicking the DSC signature of the document is done successfully.

On successfully signature, the details of the Blocked Contractors can be viewed in the **View** tab.

Refer to the screen shared below.

Figure 4-80 View Blocked Contractor Details Screen

- The Contractor Code, Name of the Contractor, Mobile Number, Remarks, Status and Document Uploaded is displayed in a table.

- The user can download and view the document uploaded by clicking the pdf icon.

Figure 4-81 Document - Signed by the Authority
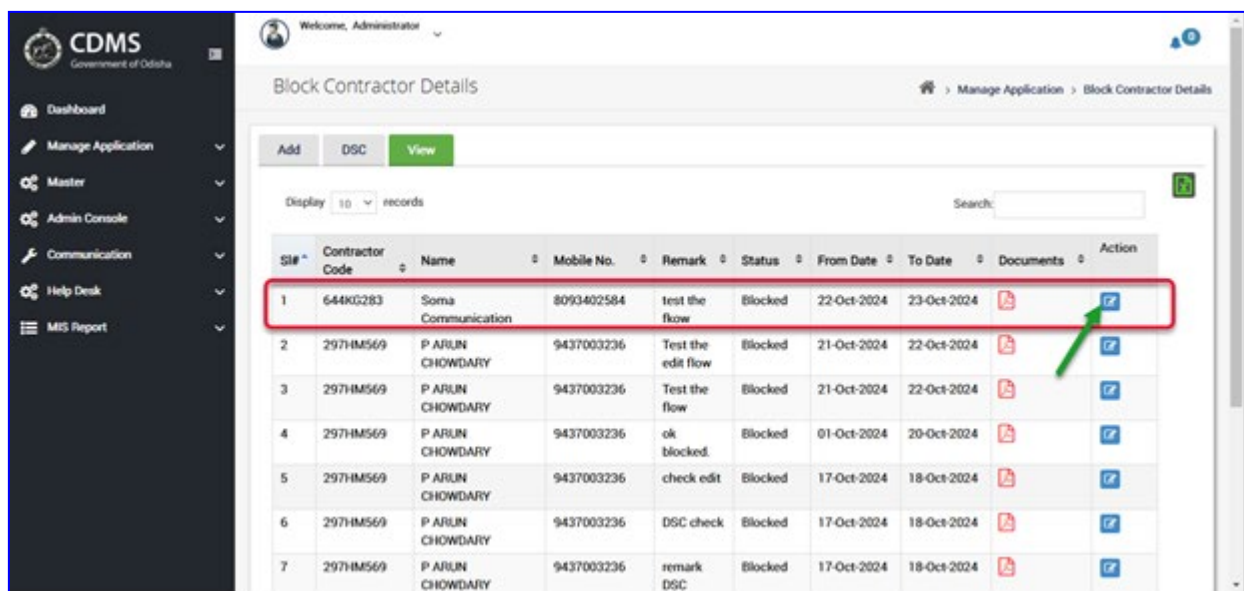
4.18 EXTENSION/REVOCATION OF UNBLOCKED CONTRACTOR DETAILS

The application allows the authorized admin user to unblock a blocked contractor details after a certain period of time, in case the Contractor has done the correction to the activities

which leads to blocking the Contractor Details previously, or do extension of the contractor license blocking period, if its blocked already.

Go to the View Blocked Contractor Details, where the list of Contractor Data currently in blocked status can be viewed.

Figure 4-82 View Blocklist Contractors Screen

Refer to the Figure shown above.

- The Name and other details of the blocked contractor are provided in a table with option to take an action.

- To take action i.e. unblock the Contractor or extend the blocking period, click on the Take Action ( ) button.

On clicking system will navigate to the Unblock Contractor Details section.

Figure 4-83 View Blocklist Contractors Screen

- For extension of the blocking period, click on the **Yes** option and add the blocking period details.
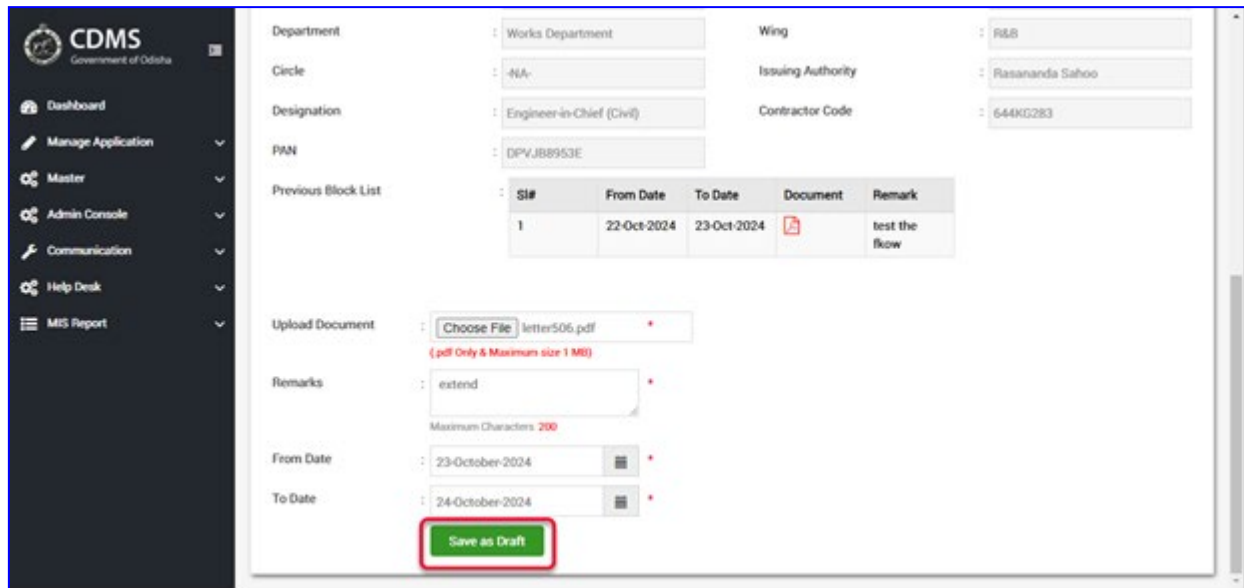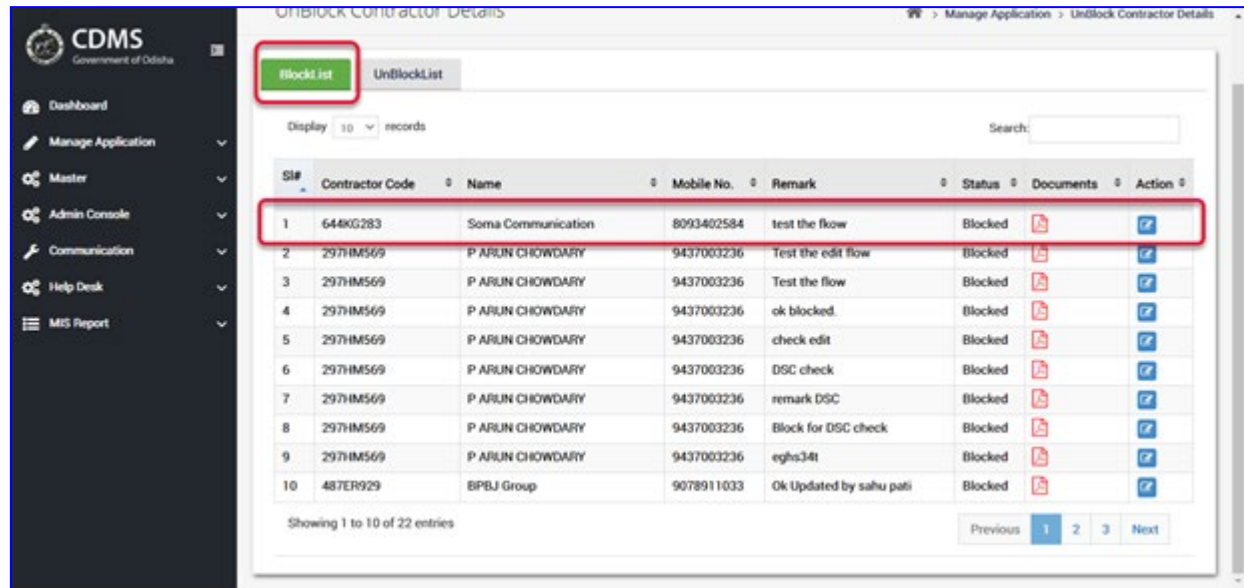
Figure 4-84 View Blocklist Contractors Screen

- Upload respective document.

- Add remarks in the textbox.

- Select the From and To Dateline, and click on **Save as Draft** button.

On submission the data is saved successfully in the system.

Similarly, for revocation of the blocking period, select the Yes option for revocation of blocking period option, and navigate to the Blocklist.

Figure 4-85 View Blocklist Contractors Screen

- To take action i.e. unblock the Contractor, click on the Take Action (🖉) button.
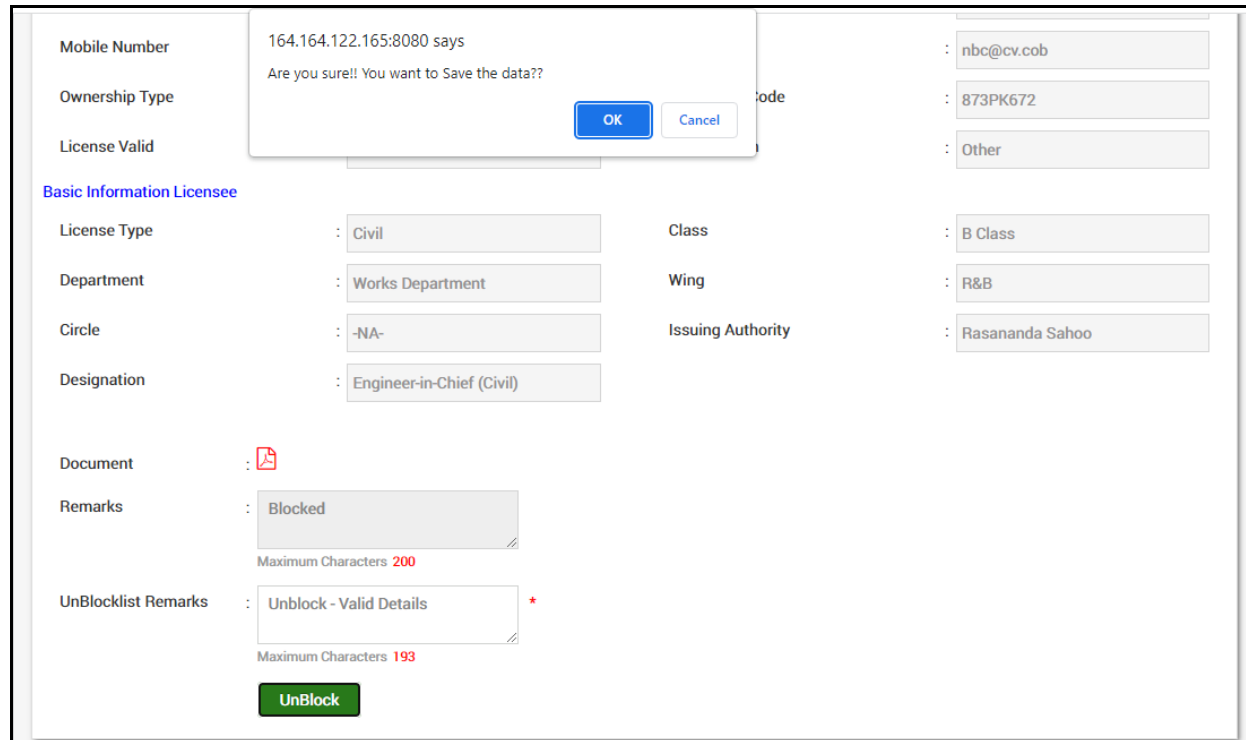
Figure 4-86 Unblock Contractor Details Screen

Refer to the Figure shown above.

- The complete detailed information of the Contractor is provided in this section.

- Add remarks for the action to be taken.

- Click on **Unblock** button.

On clicking, a system generated confirmation alert message will populate on the display screen.

Figure 4-87 Confirmation Alert Message Screen

- Click on **OK** button, if you are sure you want to save the data.

  o Or, click on **Cancel** button to cancel the action taken.

On confirmation only, the Contractor Details is unblocked and a message displaying the same will also populate on the display screen.

Figure 4-88 Unblocking Confirmation Message Screen

- Click on the OK button to close the pop-up window appeared.

On successfully taking the action, the details of the Unblocked Contractors can be viewed in the **Unblocklist** tab.

Refer to the screen shared below.
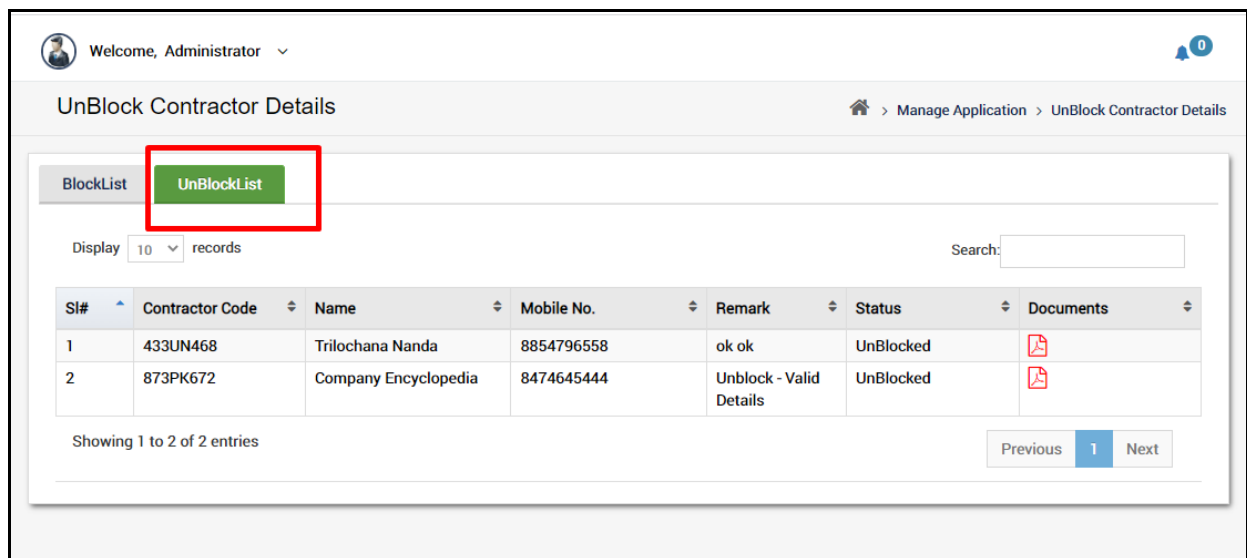
Figure 4-89 Unblocklist Screen

- The Name and other details of the unblocked contractor is displayed in the above screen.

- The user can download the attached document by clicking the pdf icon.

4.19 BLACKLIST CONTRACTOR DETAILS

If the Contractor is involved in illegal or criminal activities, or using the Contractor's license in improper way; then the EE User or TIA User can blacklist the Contractor details.
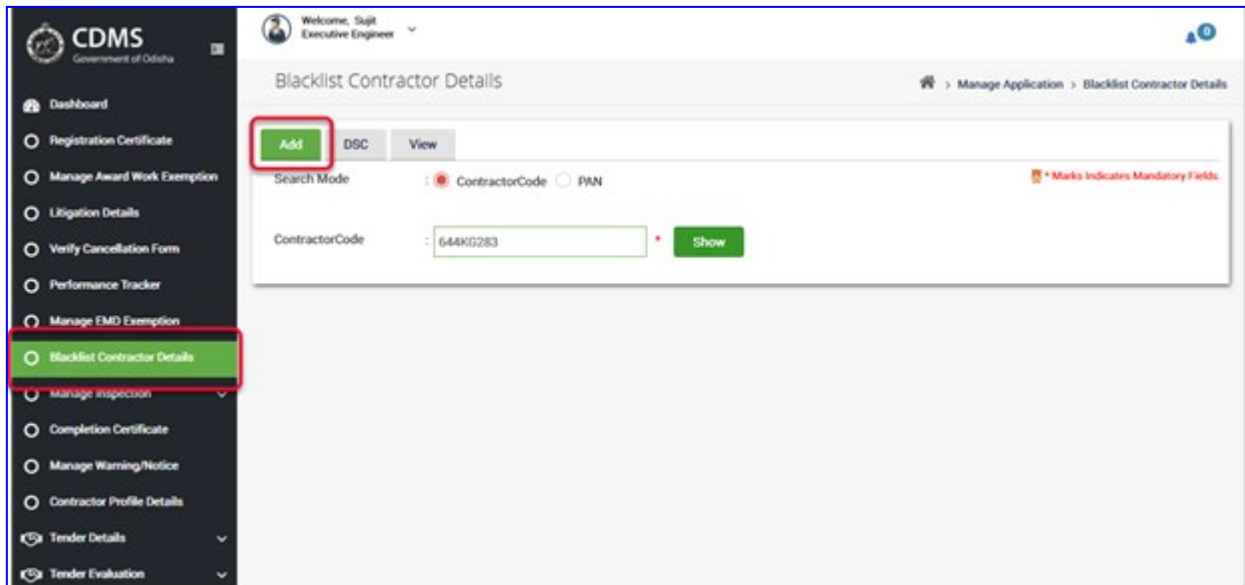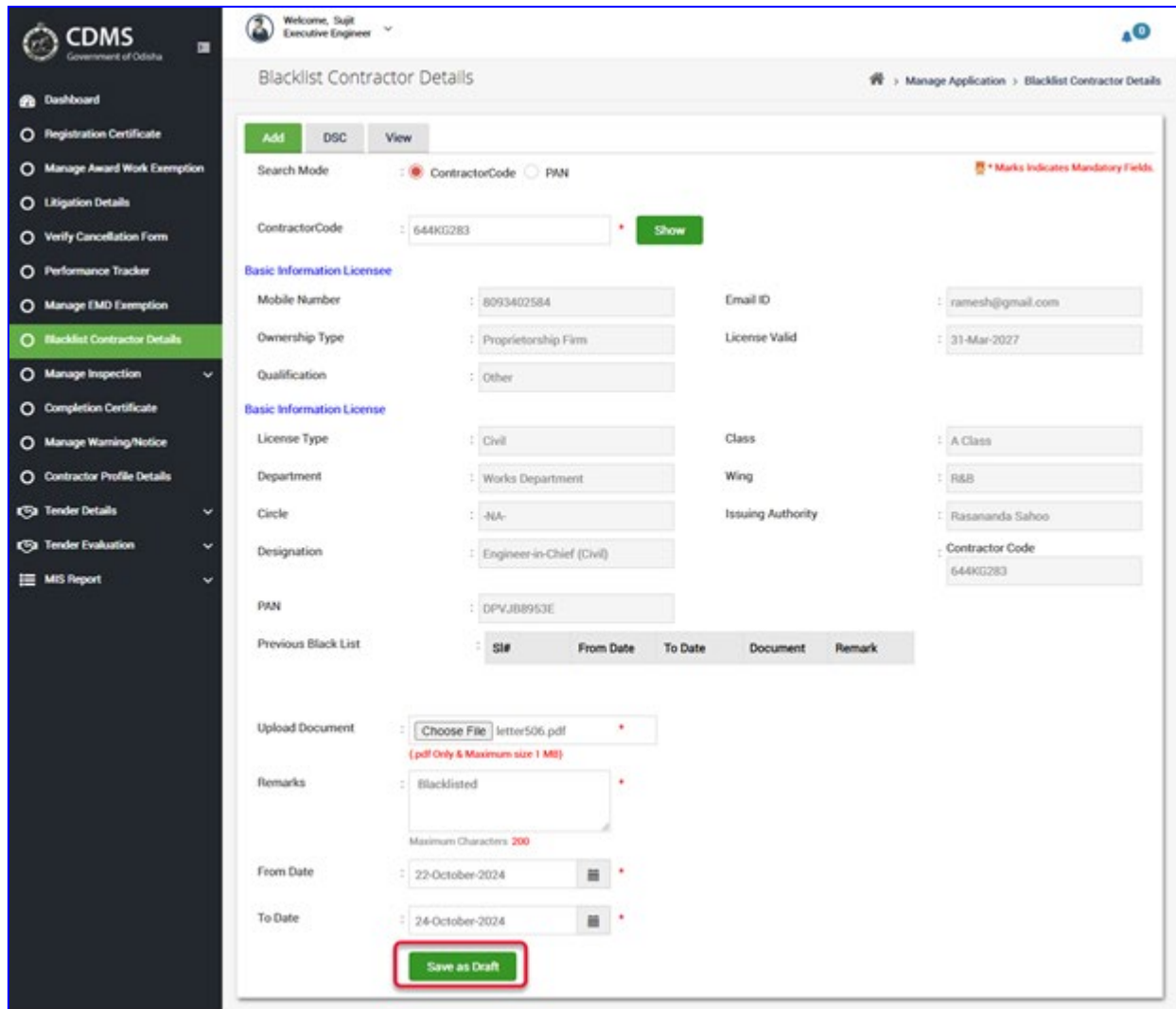
Figure 4-90 Add Blacklist Contractor Details Screen

Refer to the screen shared above.

- In the Add section of Blacklist Contractor Details, enter the Contractor's Code or PAN number in the textbox to whom you want to blacklist and then click on **Show** button.

- On clicking the Show, detailed information about the Contractor will populate in the add section.

Figure 4-91 Add Blacklist Contractor Details Screen

- Refer to the figure shown above, upload a document in support of the action to be taken.

- Add remarks for blacklisting the Contractor.

- Click on **Save as Draft** button.

On clicking, a system generated confirmation alert message will populate on the display screen.

Figure 4-92 Confirmation Alert Message Screen

- Click on **OK** button, if you are sure you want to save the data.

  o Or, click on **Cancel** button to cancel the action taken.

On confirmation only, the Contractor Details is blacklisted and pending for DSC and a message displaying the same will also populate on the display screen.

Figure 4-93 Data Blacklisted Successfully Message Screen

- Click on the OK button to close the pop-up window appeared.

On successfully taking the action, the user needs to do the digital signature of the blacklisting document uploaded.
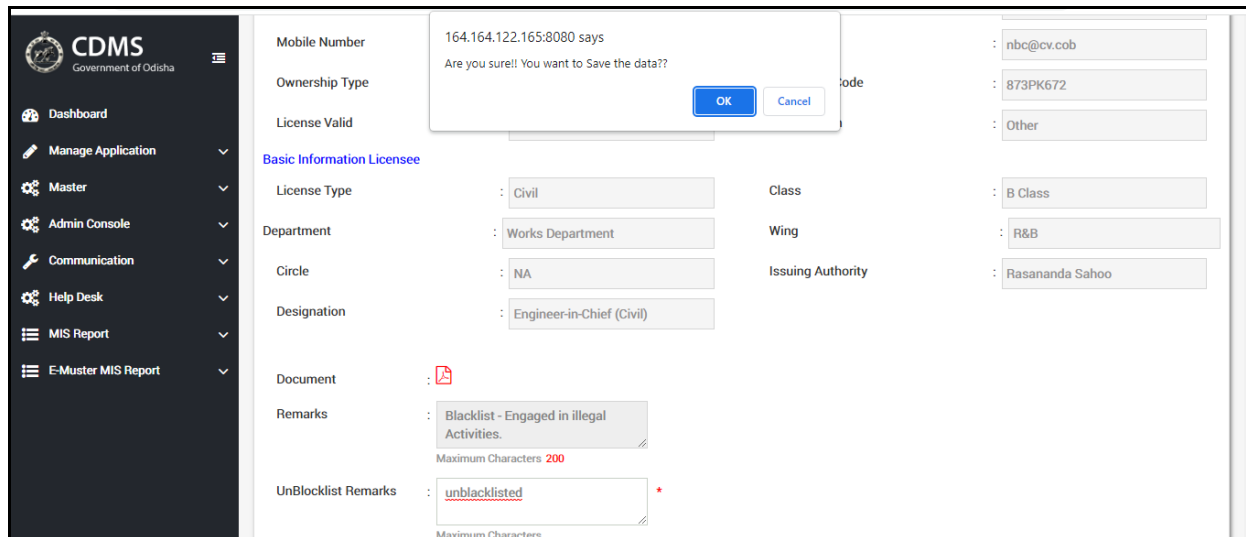
Navigate to DSC section.
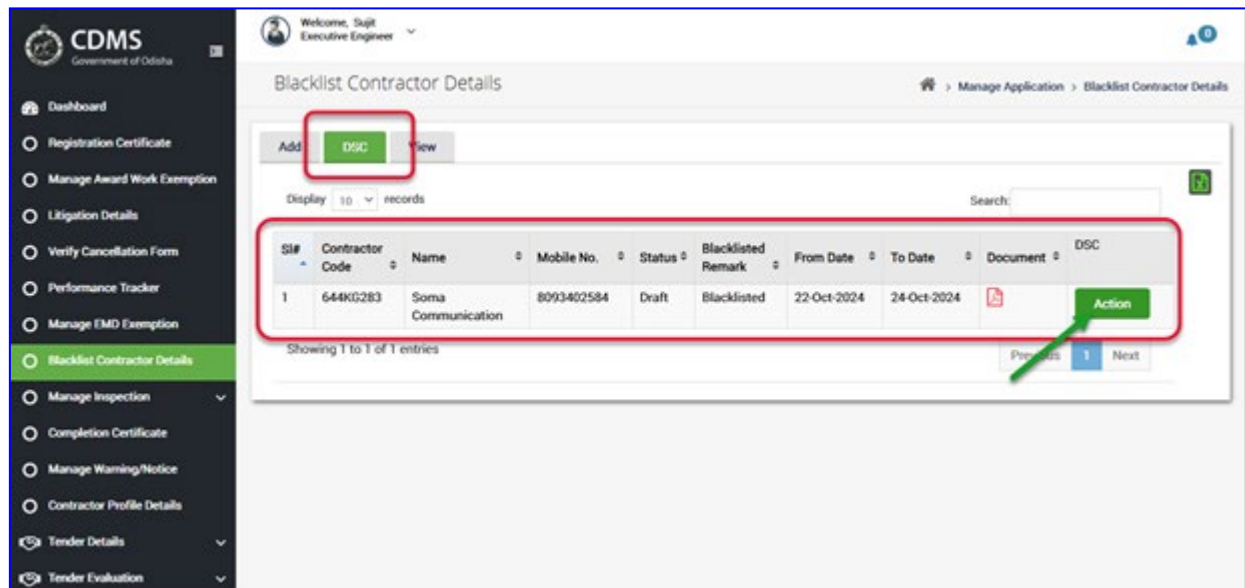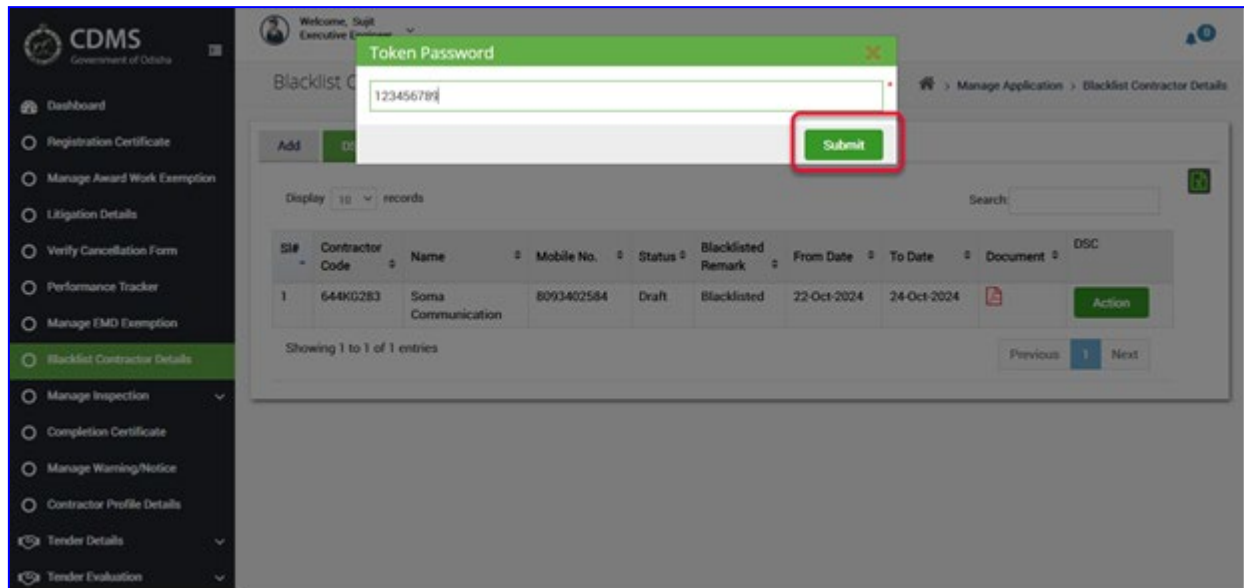
Figure 4-94 Blacklist Contractor Details - DSC

- To take action. i.e. digitally sign the approval letter for blacklisting the contractor id, click on the **Action** (Action) button.

Figure 4-95 Token Password

- Enter the token password, click on **Submit** button.

On clicking the DSC signature of the document is done successfully.

Figure 4-96 Confirmation Message

On successfully signature, the details of the Blacklisted Contractors can be viewed in the **View** tab.

Refer to the screen shared below.

Figure 4-97 Blacklisted Contractor Details Screen

- The Contractor Code, Name of the Contractor, Mobile Number, Remarks, Status and Document Uploaded is displayed in a table.

- The user can download and view the document uploaded by clicking the pdf icon.
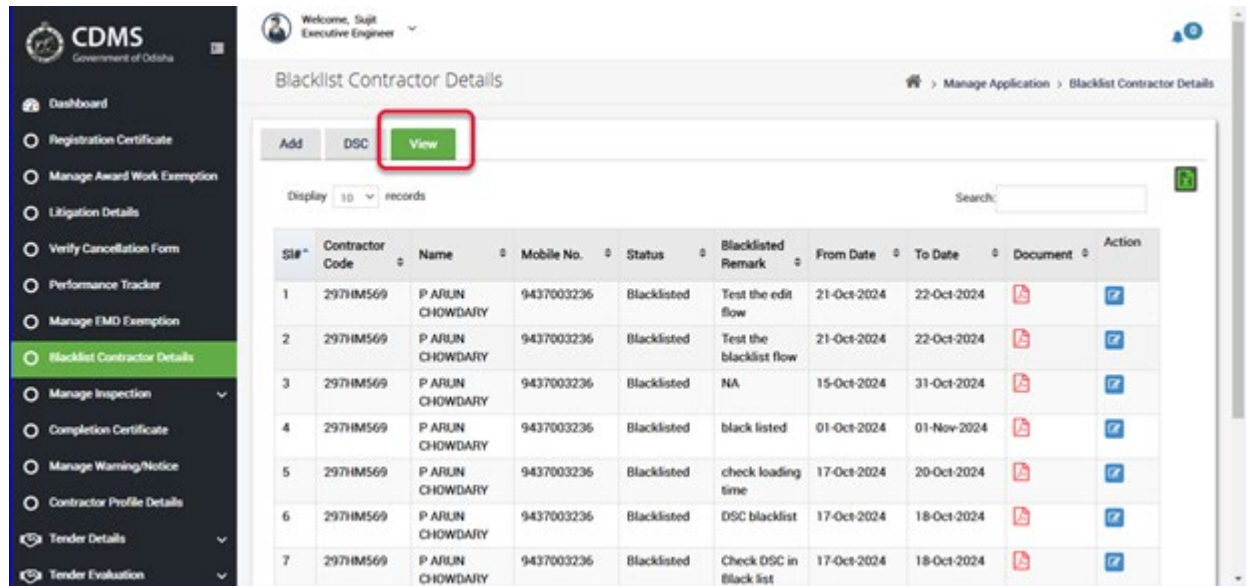
4.20 EXTENSION OF BLACKLIST PERION/UNBLACKLIST CONTRACTOR DETAILS

The application allows the authorized admin user to unblacklist a blacklisted contractor details, or can extend the blacklisting period of the Contractor License

Go to the View blacklisted Contractor Details, where the list of Contractor Data currently in blacklist status can be viewed.

Refer to the screen shared below.

Figure 4-98 Blacklisted Contractor Details Screen

- The Contractor Code, Name of the Contractor, Mobile Number, Remarks, Status and Document Uploaded is displayed in a table.

- To take action i.e. unblock the Contractor or extend the blacklisting period, click on the Take Action ( ) button.

On clicking system will navigate to the blacklisted Contractor Details section.

Figure 4-99 Blacklisted Contractor Details Screen

For extension of the blacklisting period, click on the **Yes** option and add the blacklisting period details.

Figure 4-100 Blacklisted Contractor Details Screen

- Upload respective document.

- Add remarks in the textbox.

- Select the From and To Dateline, and click on **Save as Draft** button.

On submission the data is saved successfully in the system.

Similarly, for revocation of the blacklisting period, select the Yes option for revocation of blacklisting period option, and navigate to the Blacklisted.

Figure 4-101 View Blacklisted Contractor Details Screen

Refer to the Figure shown above.

- The Name and other details of the blacklisted contractors are provided in a table with option to take an action.

- To take action i.e. unblacklist the Contractor, click on the Take Action ( ) button.

On clicking system will navigate to the Unblacklist Contractor Details section.

Figure 4-102 Unblacklist Contractor Details Screen

Refer to the Figure shown above.

- The complete detailed information of the Contractor is provided in this section.

- Add remarks for the action to be taken.

- Click on **Unblacklist** button.

On clicking, a system generated confirmation alert message will populate on the display screen.

Figure 4-103 Unblacklist Confirmation Alert Message Screen

- Click on **OK** button, if you are sure you want to save the data.

  o Or, click on **Cancel** button to cancel the action taken.

On confirmation only, the Contractor Details is unblacklisted and a message displaying the same will also populate on the display screen.
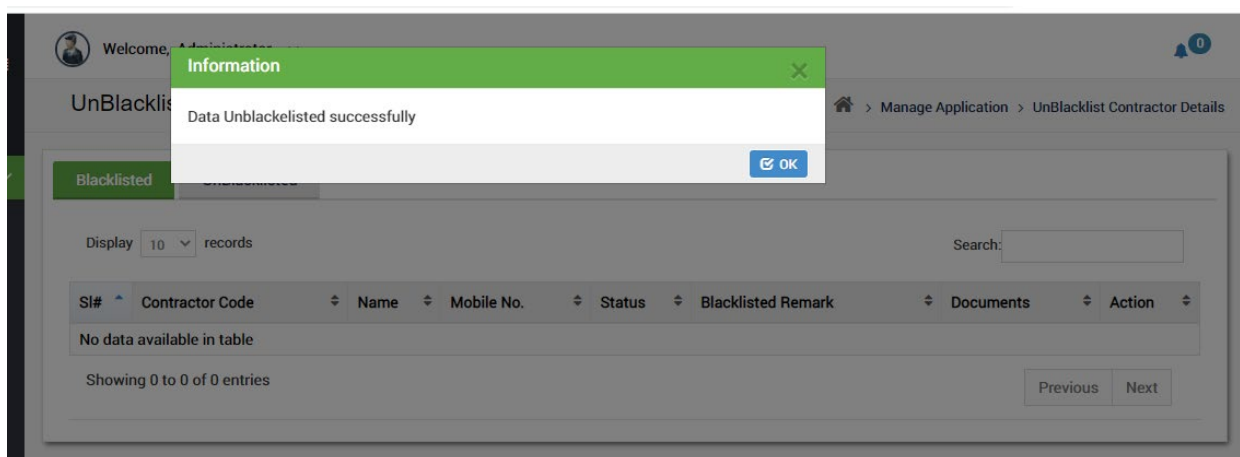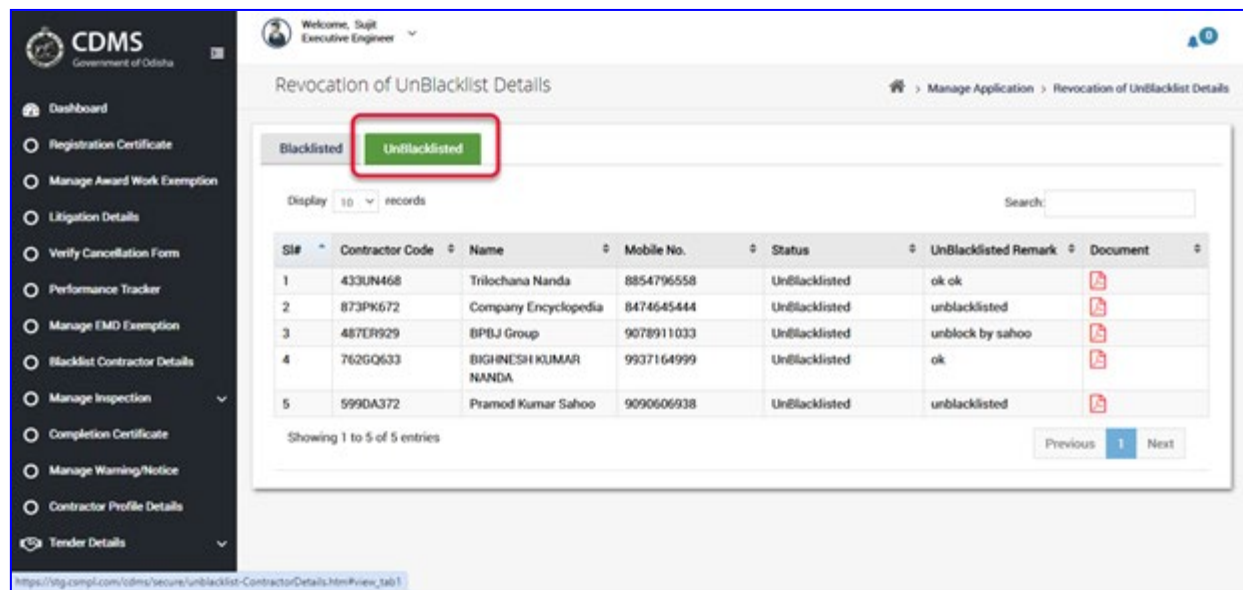
Figure 4-104 Unblacklist Confirmation Message Screen

- Click on the OK button to close the pop-up window appeared.

On successfully taking the action, the details of the Unblacklisted Contractors can be viewed in the **Unblacklisted** tab.

Refer to the screen shared below.

Figure 4-105 Unblacklisted Contractors Screen

- The Name and other details of the unblacklisted contractor is displayed in the above screen.

- The user can download the attached document by clicking the pdf icon.

4.21 MANAGE AWARD WORK EXEMPTION

Add and manage the details of the exemplary work of any licensee in this section.

Figure 4-106 Manage Award Work Exemption Screen

- Enter the Contractor Code, select the Calendar Year and click on Search button to view the Contractor work.

- On clicking the details of the contractor for the year appears.

- Enter the Name of the Work and click on **Add More** button.

- On clicking, the awarded work name, name of the submitee and date of submission appears in a table.

- Now, click on **Submit** button to save the awarded work information in the system.
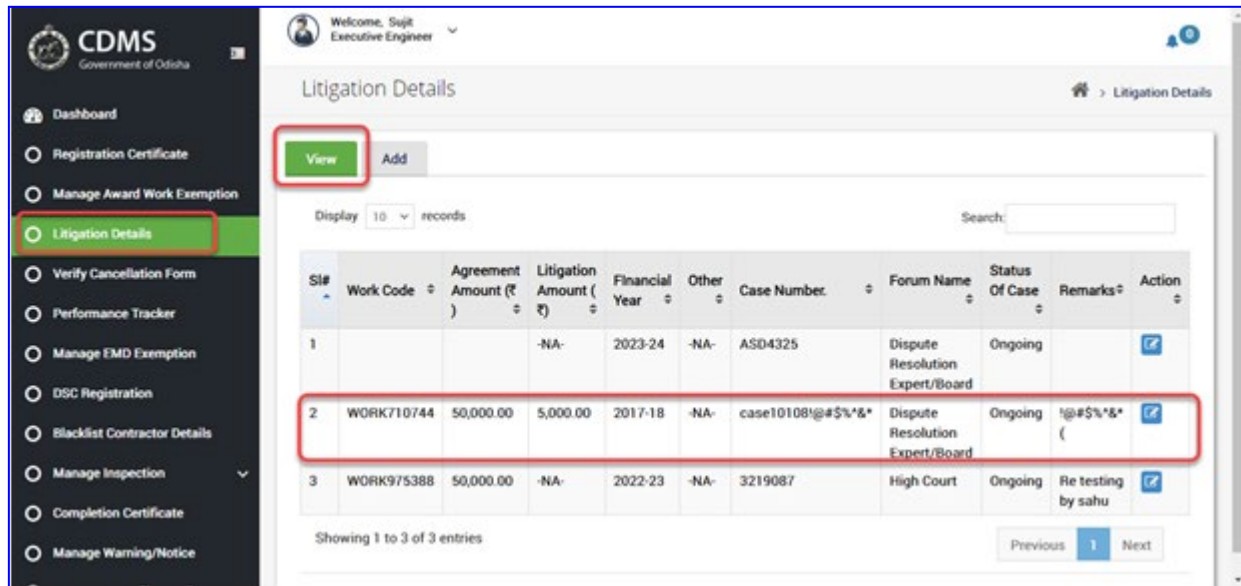
4.22 LITIGATION DETAILS

Add and manage the details of any legal case or litigation registered against the Contractor and project code in the **Litigation Details**.

4.22.1 VIEW

View the list of the litigation registered and resolved with agreement amount, litigation amount, financial year, case number and other information in the View link.

Figure 4-107 View **-** Litigation Details Screen

Take reference from the screen shared above.

- Now, in order to update any changes in the litigation details, click on the **Action** button, and navigate to the edit section.

Figure 4-108 Update **-** Litigation Details Screen

- Add changes in the litigation details and click on the **Update** button to save the changes done.

4.23 PERFORMANCE TRACKER

View Contractor Wise Project performance status in the Performance Tracker link. Take reference from the screen shared below.

Figure 4-109 View - Performance Tracker Screen

The name of the contractor, contractor code, e-Procurement Tender ID, Agreement Number, Performance Scale and Remarks are displayed in the View link.

To add new performance details, click on the **Add** tab.
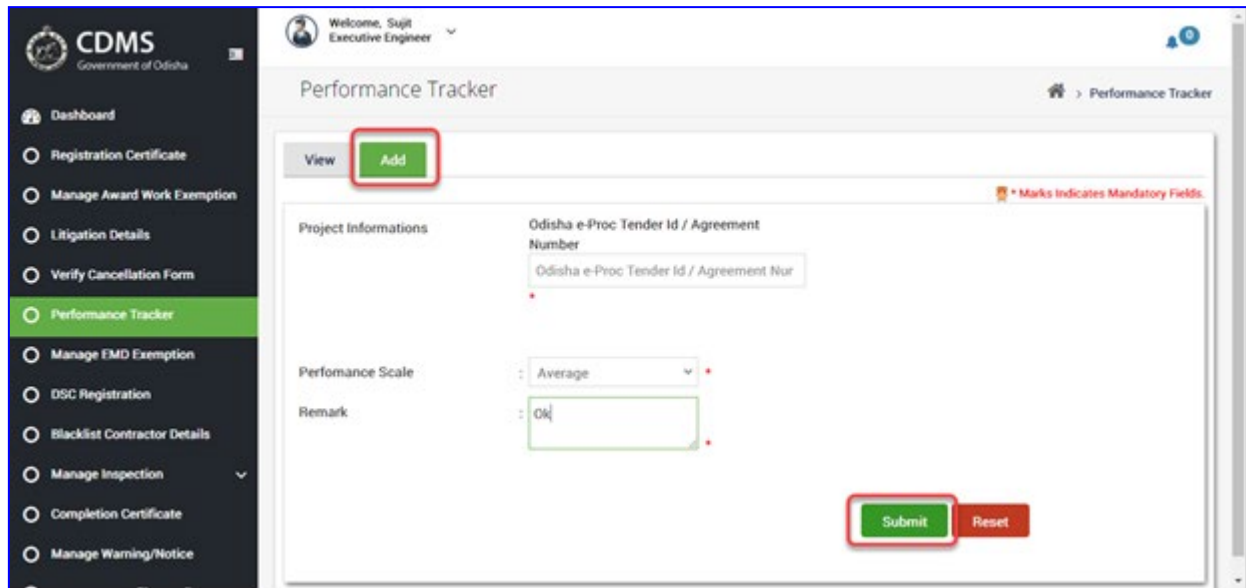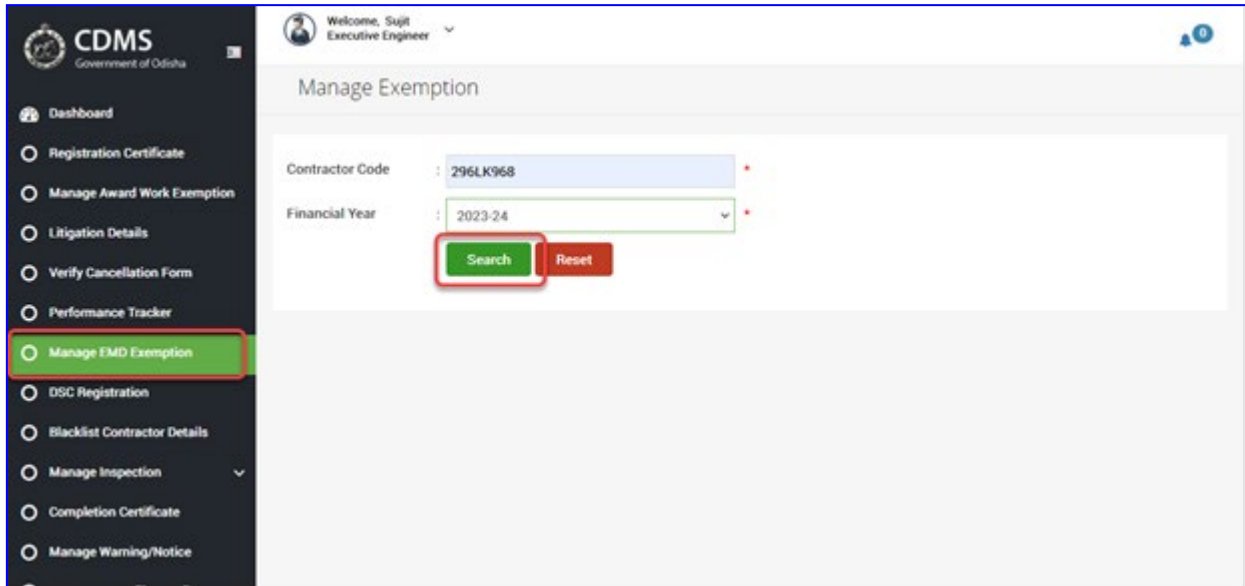
Figure 4-110 Add - Performance Tracker Screen

- Enter the Project Information. Enter the Odisha e-Procurement Tender ID or Agreement Number.

- Select the Performance Scale.

- Add remarks.

- Click on **Submit** button. On submission only, the project performance rating is updated in the system.

4.24 MANAGE EMD EXEMPTION

The system allows the authorized department user to tag and exempt a contractor code from EMD charges applicable. For doing so, the authorized user needs to permit the contractor from EMD exemption in this section.

Figure 4-111 Manage EMD Exemption Screen
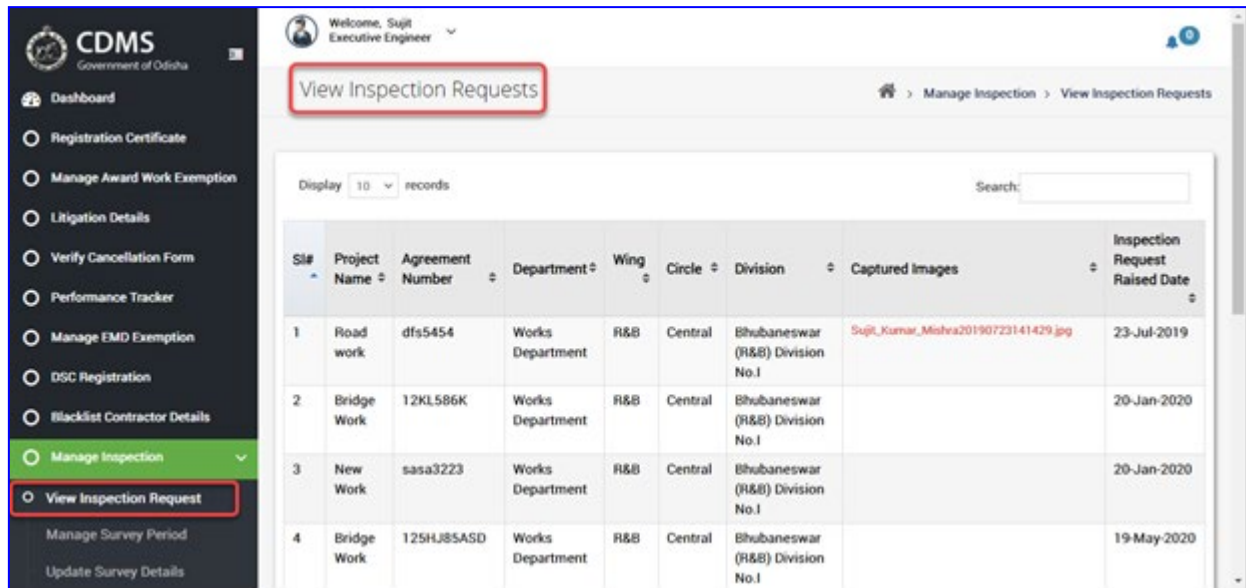
- Enter the Contractor Code.

- Select the Financial Year and click on **Search** button to view whether the contractor is eligible for exemption or not.

4.25 MANAGE INSPECTION

4.25.1 VIEW INSPECTION REQUEST

View the complete list of the project inspection request received at the authorized department user in this link.

Figure 4-112 View Inspection Request Screen

The name of the project, agreement number, department name, wing, circle, division, captured images and inspection request raised date is displayed in a table.
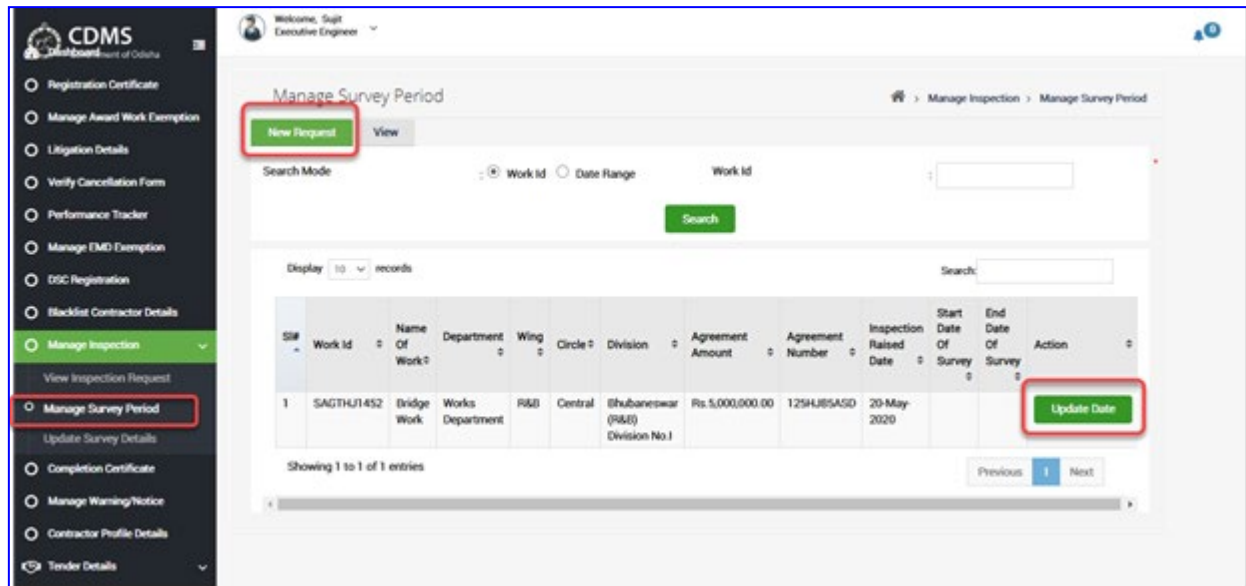
4.25.2 MANAGE SURVEY PERIOD

The department user is authorized to view and update the survey period.

4.25.2.1 PENDING REQUEST

View the list of the request pending for survey period update in the pending request.

Figure 4-113 Manage Survey Period - New Request Screen

- Update the new survey timeline clicking the Update Date button, as highlighted in the figure show above.

4.25.2.2 VIEW

To view the list of the survey where the survey period has been updated, go to the View tab under the Manage Survey Period link.

Figure 4-114 Manage Survey Period - View Screen
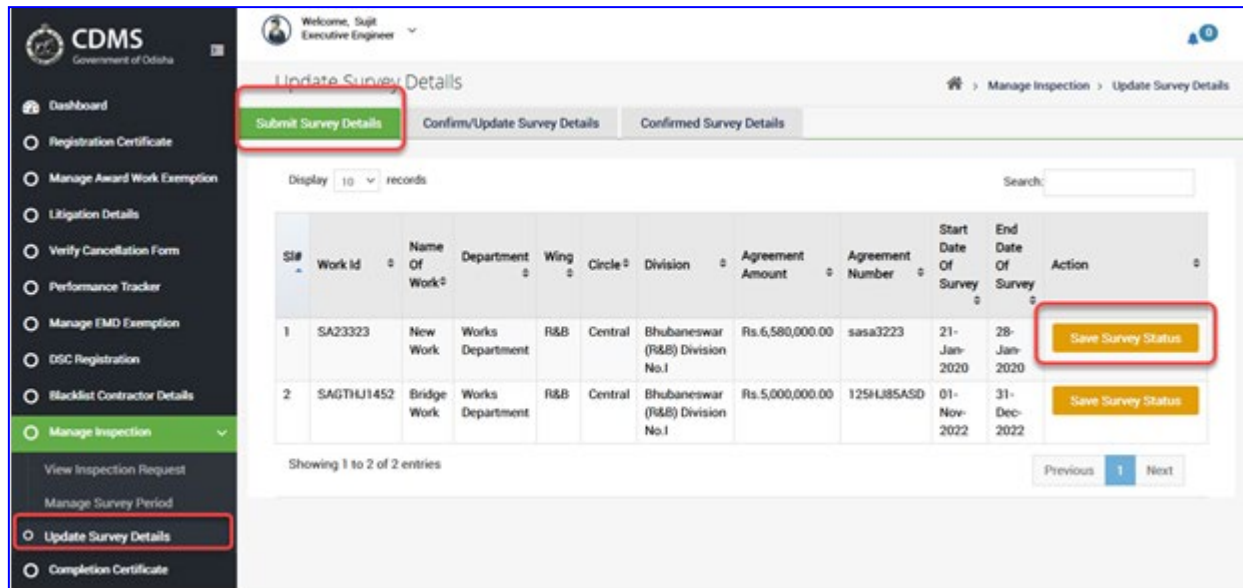
4.25.3 UPDATE SURVEY DETAILS

View and update the survey information in the **Update Survey Details** link.

4.25.3.1 SUBMIT SURVEY DETAILS

Save the survey responses with respect to a project in the **Submit Survey Details** link.

Figure 4-115 Submit Survey Details Screen

- Herein, the work ID, name of the work, department, wing, circle and other information of the survey are provided in a table.

- Click on **Save Survey Details** button.

Figure 4-116 Questionnaires - Submit Survey Details Screen

The list of the question and work category with answers to select are provided here.

- Answer in either Yes or No option for respective question.

- Click on **Save** button.

- On clicking the save button, the response for respective question is saved in the system.

4.25.3.2 CONFIRM/UPDATE SURVEY DETAILS

The authorized department user needs to confirm the survey details or update the status for final submission in this link.
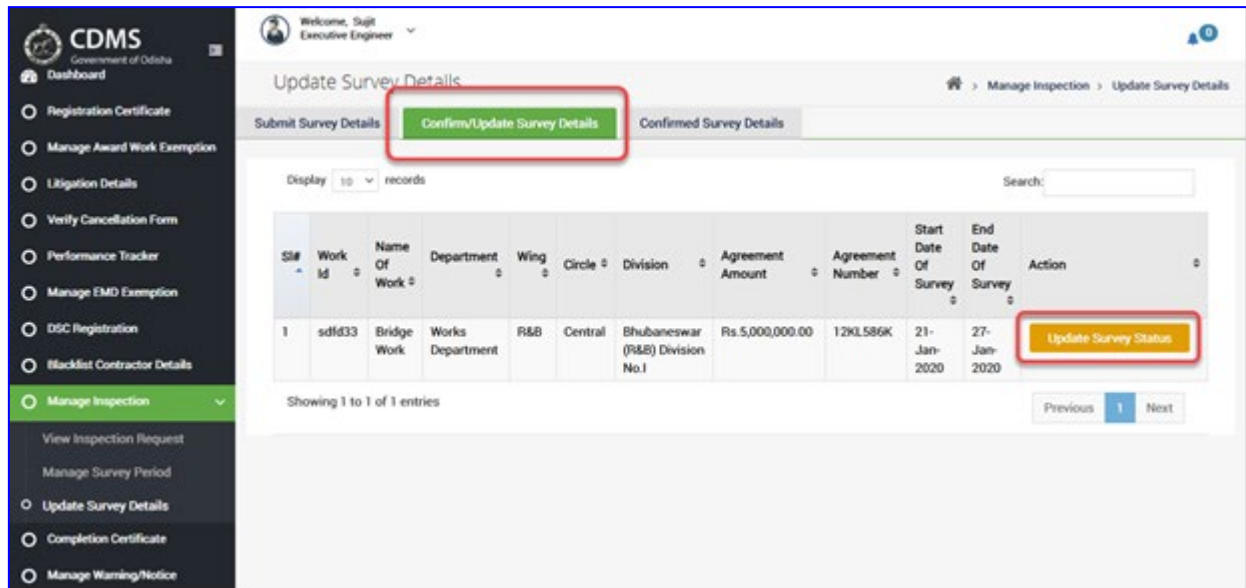
Figure 4-117 Confirm/Update Survey Details Screen

- Click on **Update Survey Status** button.
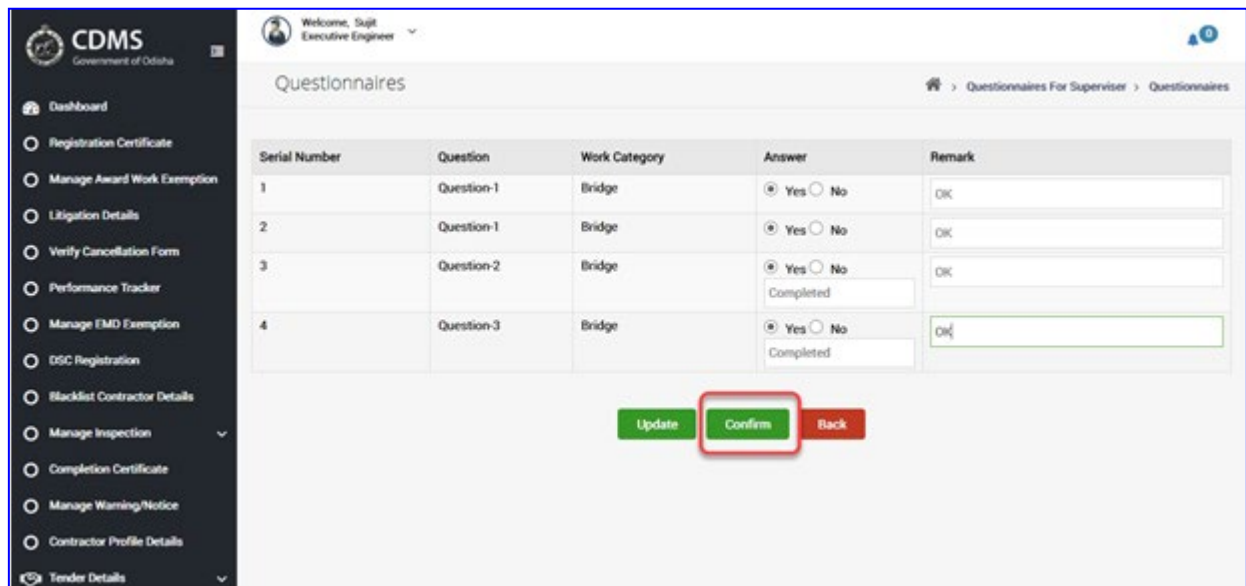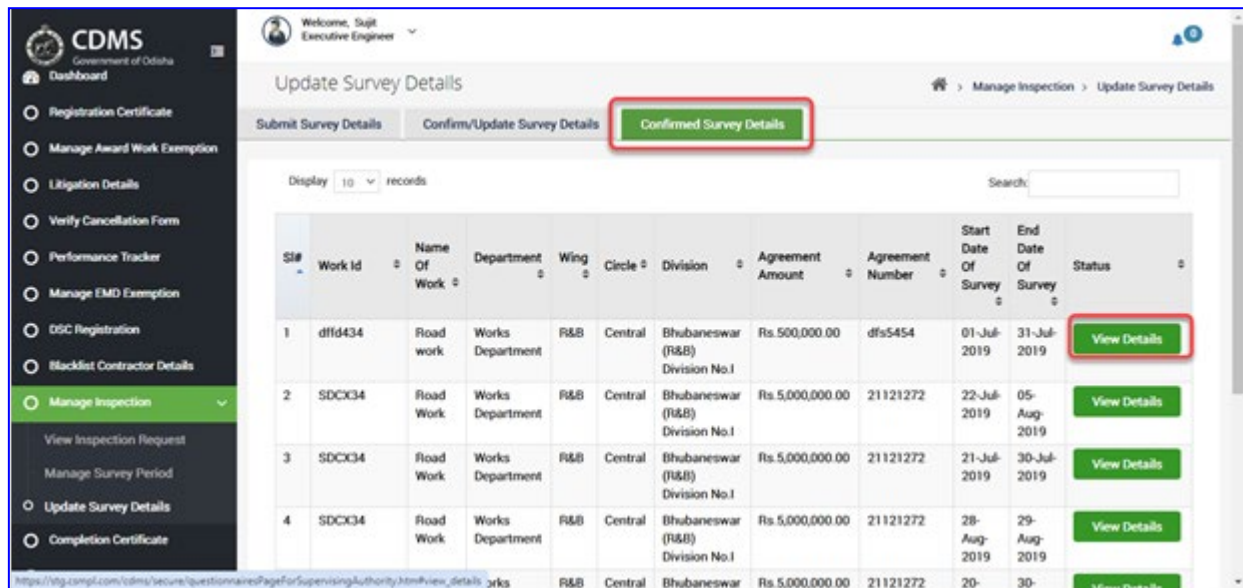
Figure 4-118 Confirm/Update Survey Details Screen

- Add remarks for each question and respective answer in the textbox.

- To update the responses, click on the Update button.

- To confirm and submit, click on **Confirm** button.

4.25.3.3 CONFIRMED SURVEY DETAILS

View the complete list of confirmed survey details in this link.

Figure 4-119 Confirmed Survey Details Screen

- To view the confirmed survey details, click on **View Details** button.

Figure 4-120 View Details - Confirmed Survey Details Screen

- The list of the questionnaires and respective answers and responses submitted are displayed in this section.

4.26 COMPLETION CERTIFICATE

View the list of the request pending for uploading the job completion certificate in this link.

Figure 4-121 Pending Request - Job Completion Certificate Upload Request Screen

- Click on **Upload** button to upload the job completion certificate for respective project name and agreement number.

- On successfully uploading the certificate, go to **Uploaded Requests** link to view the complete list of the request where job completion certificate is uploaded.
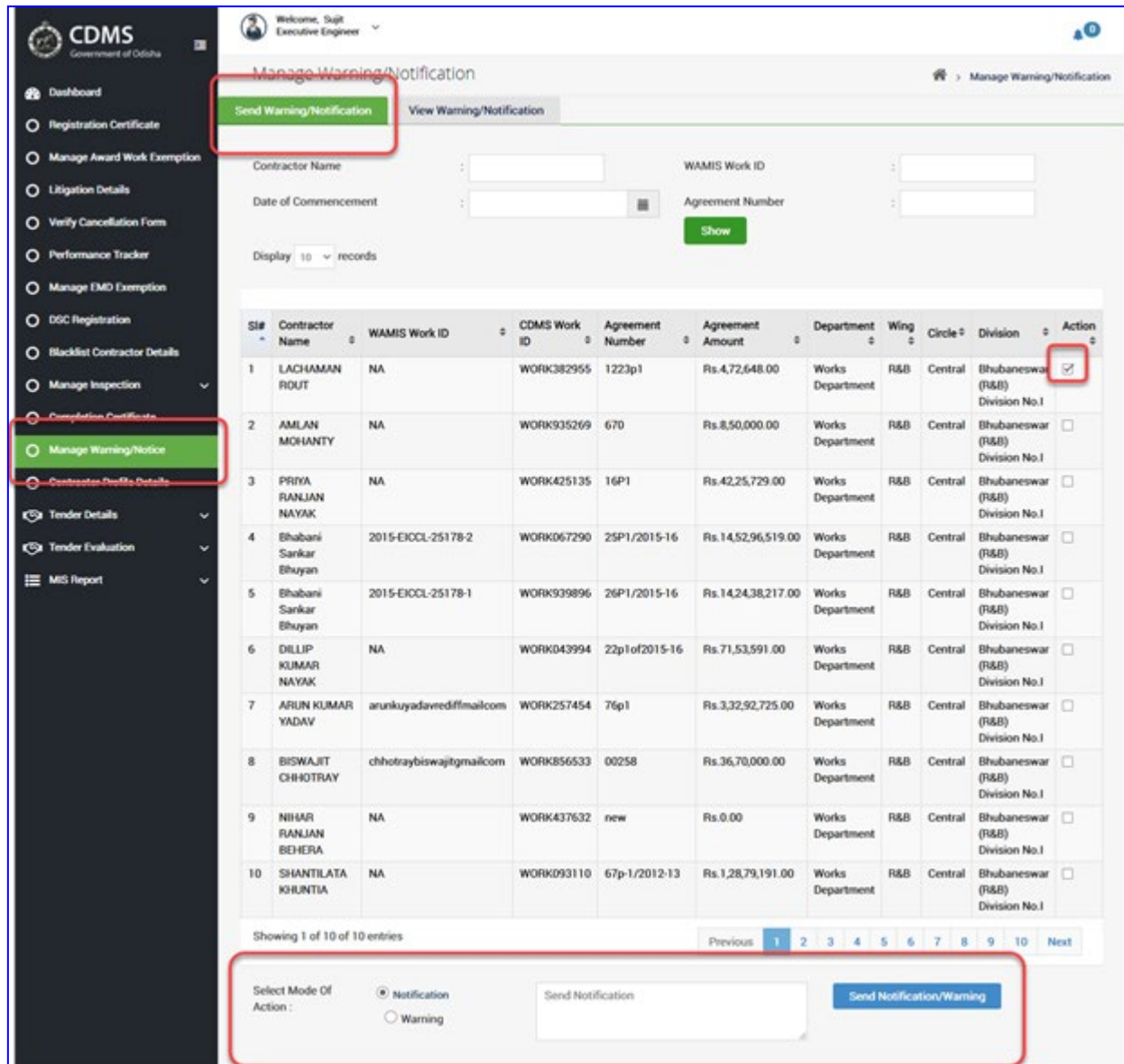
Figure 4-122 Uploaded Request - Job Completion Certificate Upload Request Screen

- Click on **View** button to view the details of the certificate.

4.27 MANAGE WARNING/NOTICE

To send any warning notice or notification to the contractor, click on the **Manage Warning/Notice** link.

Figure 4-123 Send Warning Notification Screen
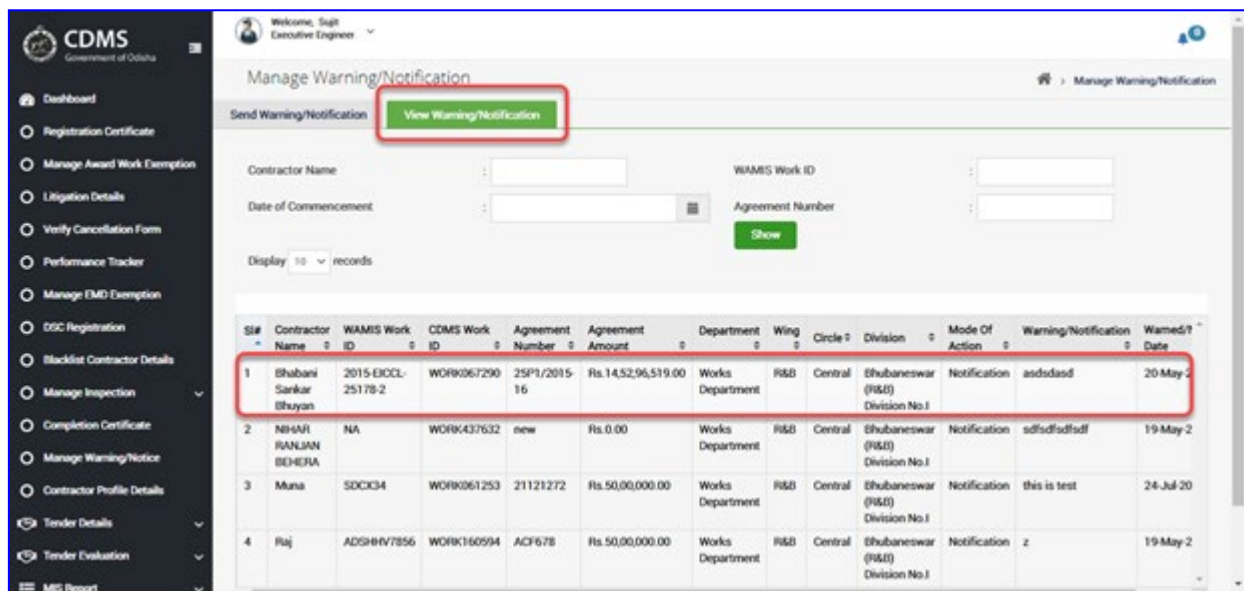
The list of the Contractor Name, Code and WAMIS Work ID and other details are displayed in the Send Warning Notification link.

- Tick the checkbox provided under the Action column to select the contractor.

- Select whether to send notification or warning.

- Add details of the warning or notification.

- Click on **Send Notification Warning** button.

View the list of Warning or Notification sent successfully to the contractor in the **View Warning or Notification** link.

Figure 4-124 View Warning Notification Screen

5   MIS REPORT

The system provides the administrative user the facility to get detailed analytical reports for easier monitoring and tracking of various activities in portal. There are MIS reports featuring Validation Summary, CSF Applied But Not Submitted, Department Wise License, and more. The MIS report gives a quick overview to the number of application submitted, their activities, approval list, license details, etc,. Referring to the encircled tab in figure below.

Figure 5-1 MIS Reports Screen

5.1 VALIDATION SUMMARY

Collect a complete, updated report on number of CSF applied, received, verified, approved or pending for verification with the designated officer in this section. The Validation Summary Report features MIS reports per LIA wise and Circle Wise in a tabular format which you can download in excel sheet.

5.1.1 LIA WISE VALIDATION SUMMARY

View a MIS Report on LIA Wise Validation Summary in this section. Refer to the screen shared below.

Figure 5-2 LIA Wise Validation Summary Screen

Here, the department name, class, name of the wing/organization, licensing authority, mobile number, etc., are shown.
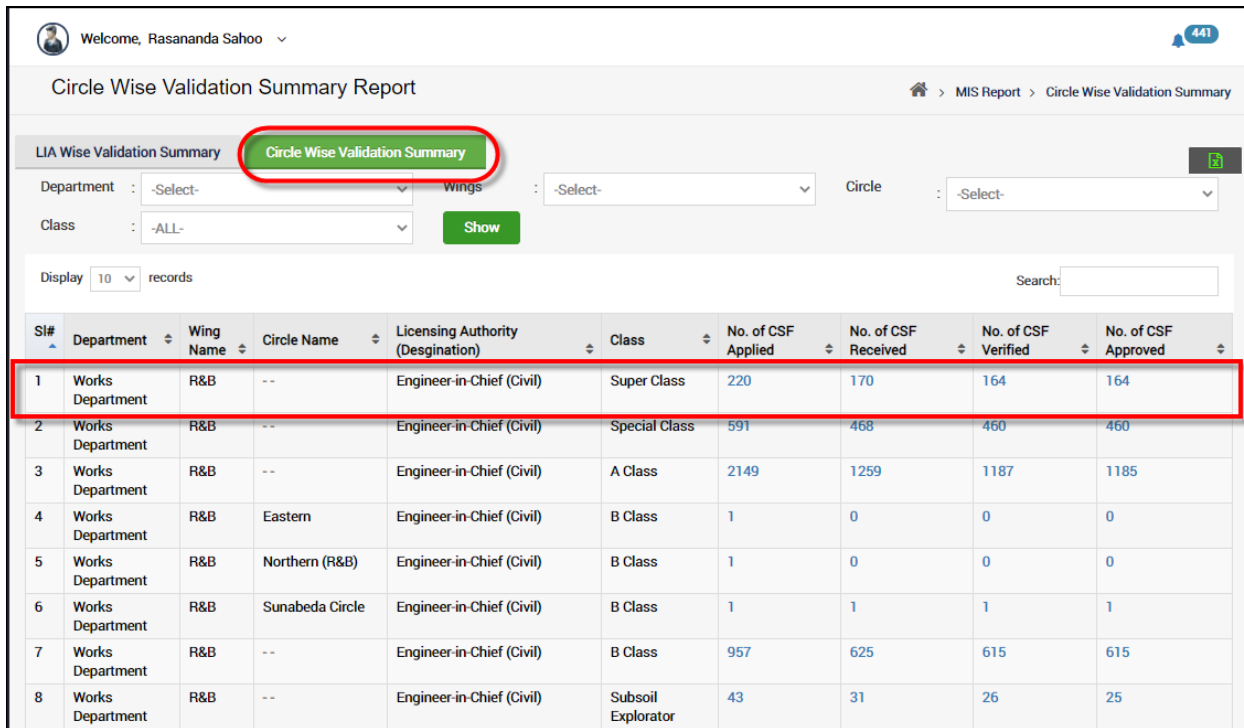
Refer to **Fig.5-2**, the number of CSF applied, received, verified, approved or pending for verification are given.

Filter the results by entering department, wing, or class in the search option.

For downloading the entire report in an excel sheet, click in the excel ▣ icon shown in the right-side of the screen.

5.1.2 CIRCLE WISE VALIDATION SUMMARY

View a MIS Report on Circle Wise Validation Summary in this section. Refer to the screen shared below.

Figure 5-3 Circle Wise Validation Summary Screen

Here, the department name, name of the wing, circle name, licensing authority, class, etc., are shown.

Refer to **Fig. 5-3**, the number of CSF applied, received, verified, approved or pending for verification are given.
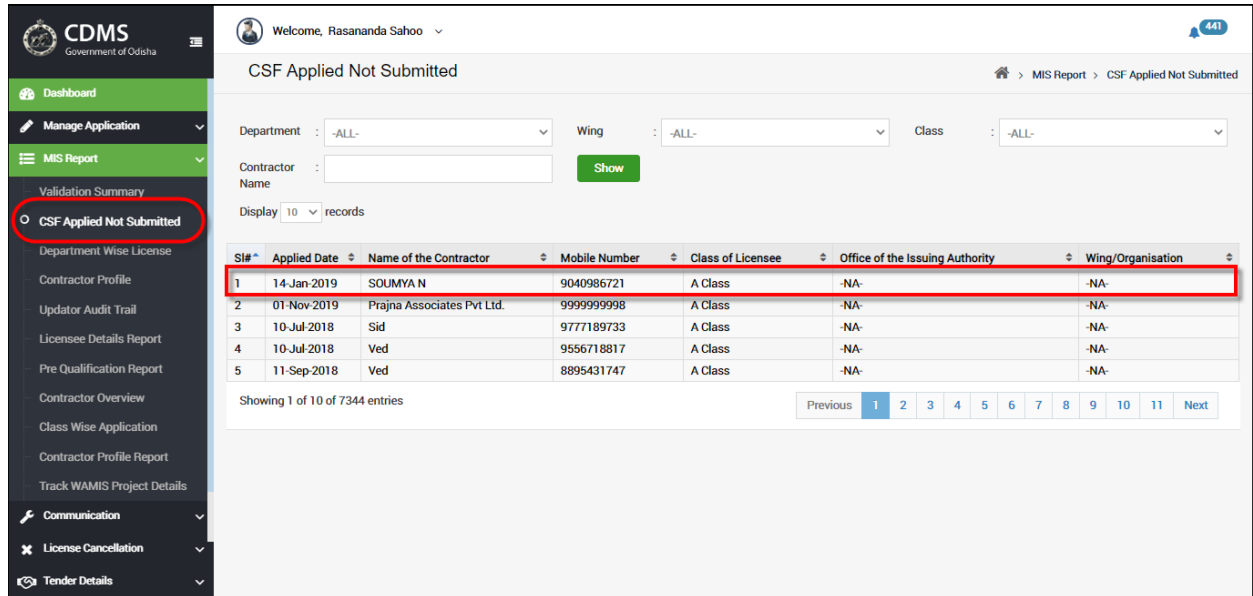
Filter the results by entering department, wing, circle and class in the search option.

For downloading the entire report in an excel sheet, click in the excel 🗎 icon shown in the right-side of the screen.

5.2 CSF APPLIED NOT SUBMITTED

View the complete list of contractors who has applied for CSF but did not submitted the application form to the portal.

Figure 5-4 CSF Applied Not Submitted Report Screen
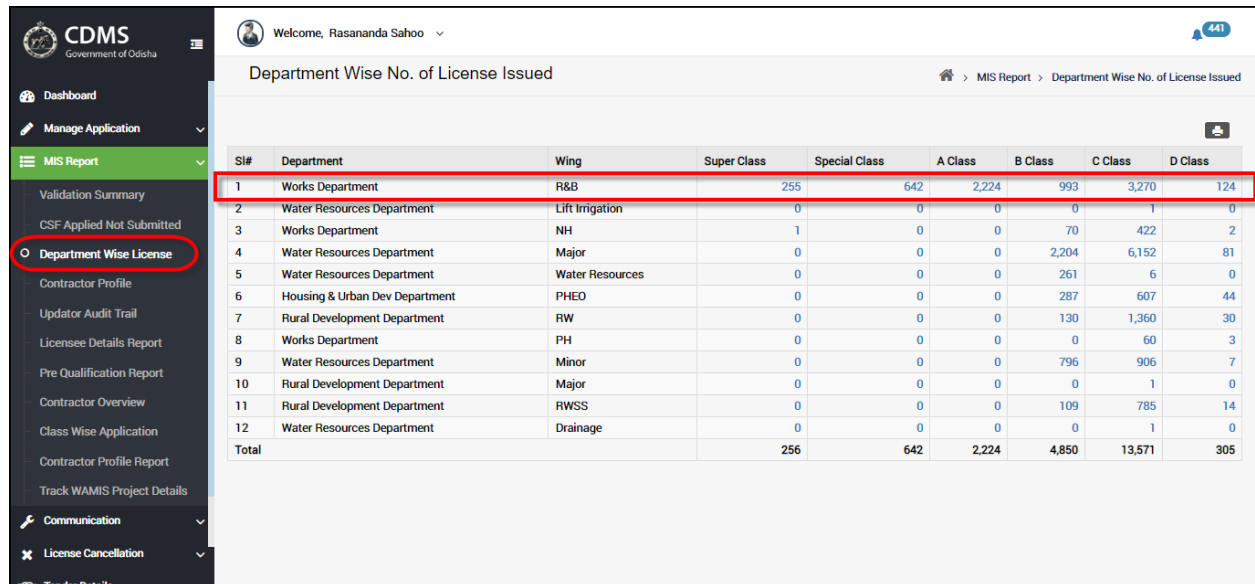
Get detailed analytical report with of CSF applied, such as date of application, contractor's name, mobile number, class of licensee, office of issuing authority and wing/organization name in the report. Refer to the highlighted section in **Fig. 5-4**.

Filter the results by entering department, wing, class and contractor's name in the search option.

5.3 DEPARTMENT WISE LICENSE

View MIS report on the total number of license issued for Super Class, Special Class, A Class, B Class, C Class and D Class under different departments. Refer **Fig. 5-5.** You can also take a print-out of the report.

Figure 5-5 Department Wise License Issued Screen

5.4 CONTRACTOR PROFILE

Get a listed view of all the registered contractors in the Contractor Profile report, along with their basic information, address, issuing authority details and date of submission, tagging, validation as well as approval. The MIS report details are highlighted with different colours to get information easily. You can filter the results and also take a print-out of the report.

Figure 5-6 Contractor Profile Screen

5.5   UPDATOR AUDIT TRIAL

View the MIS report on Updator Audit Report where contractor's name and code are given in a list. Refer **Fig. 5-7**. Filter the results using the search option provided here.
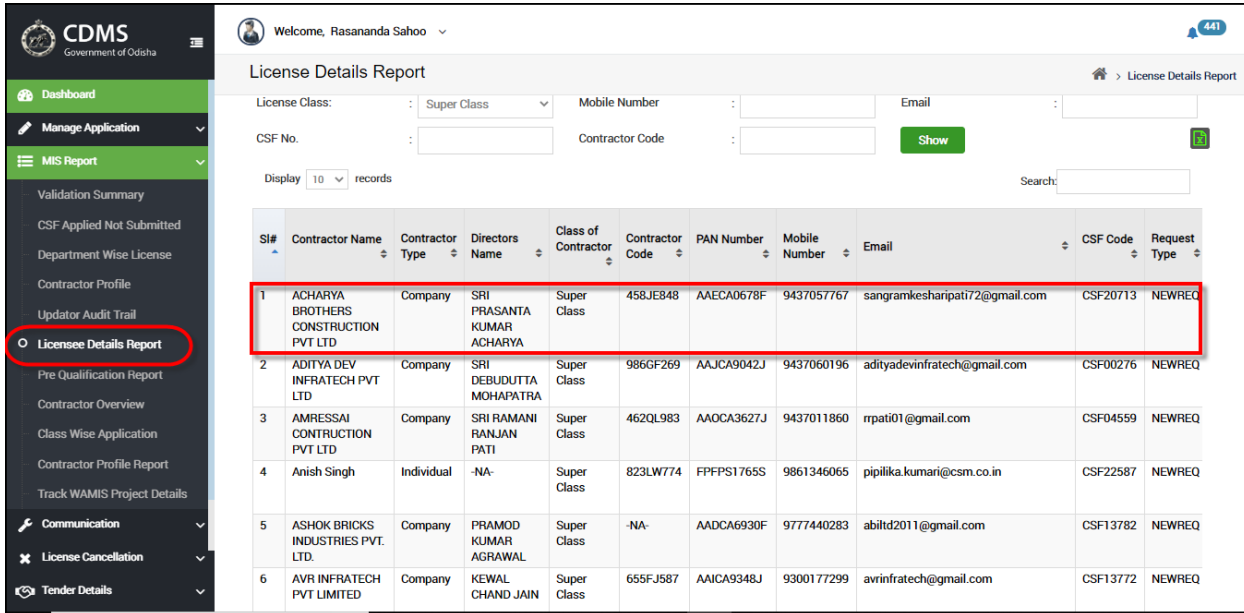
Figure 5-7 Updator Audit Report Screen

5.6   LICENSE DETAILS REPORT

View details of all the contractor's, who has been licensed by the department in the License Details Report. View contractor's name, contractor type, director's name, class of contractor, contractor code, PAN number, mobile number, email ID, CSF code and type of request send in a report format. Filter the results using the search option provided here. Download the licensee details in an excel sheet.

Figure 5-8 Licensee Details Report Screen
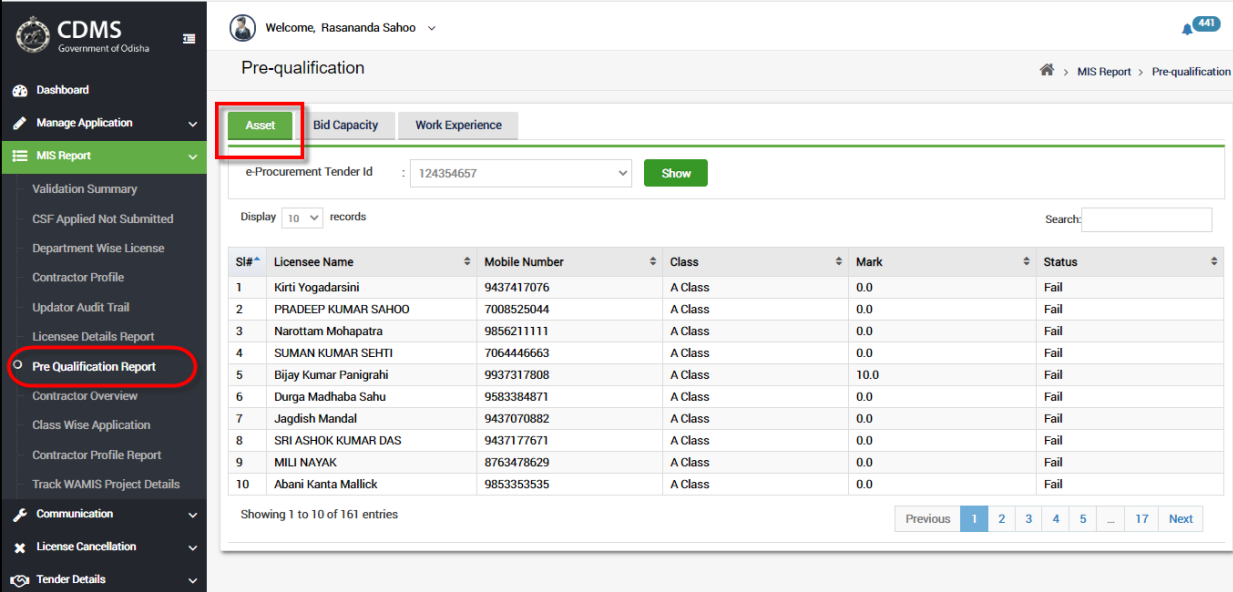
5.7 PRE QUALIFICATION REPORT

A Pre-Qualification Report is given under the MIS Reports to view the Asset, Bid Capacity and Work Experience of the licensee in a tabular format.

5.7.1 ASSET REPORT

View Report on the Assets for selected eProcurement Tender ID with their licensee name, mobile number, class, marks and status. See the details by entering a valid eProcurement ID. Filter the results using the search option provided here. Referring **Fig. 5-9**

Figure 5-9 Asset Report Screen

5.7.2 BID CAPACITY REPORT

View the Bid Capacity Report on selected eProcurement Tender ID along with licensee name, mobile number, class, and bid capacity (in lakhs) in a tabular format.

Figure 5-10 Bid Capacity Report Screen

5.7.3 WORK EXPERIENCE REPORT

View the Work Experience Report on selected eProcurement Tender ID along with licensee name, mobile number, class, and status in a tabular format.

Figure 5-11 Work Experience Report Screen

5.8 CONTRACTOR OVERVIEW

View an MIS report on different types of request send by contractors in a tabular format, take reference as upgrade, downgrade, renewal, conversion, duplicate, partial modification. Select the type of work, data required from and to date in the search option to view the respective licensee's name, mobile number, class, application date, and amount and request type. You can download the data in excel sheet here. Refer **Fig. 5-12.**
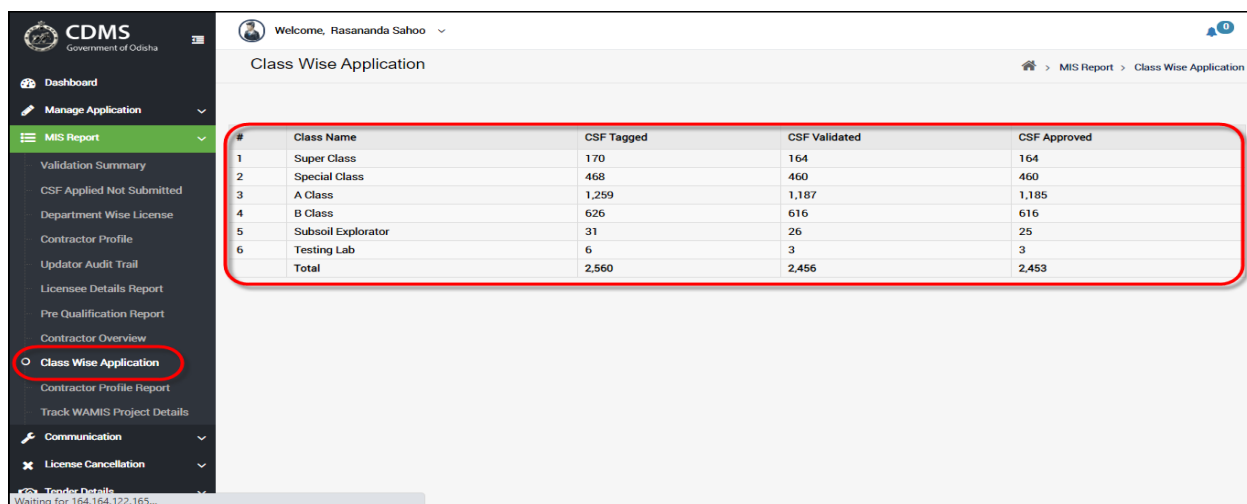
Figure 5-12 Contractor Overview Report Screen

5.9   CLASS WISE APPLICATION

View detailed report on number of application submitted per class. See the list of CSF code that is tagged, validated, approved per class in a tabular format.
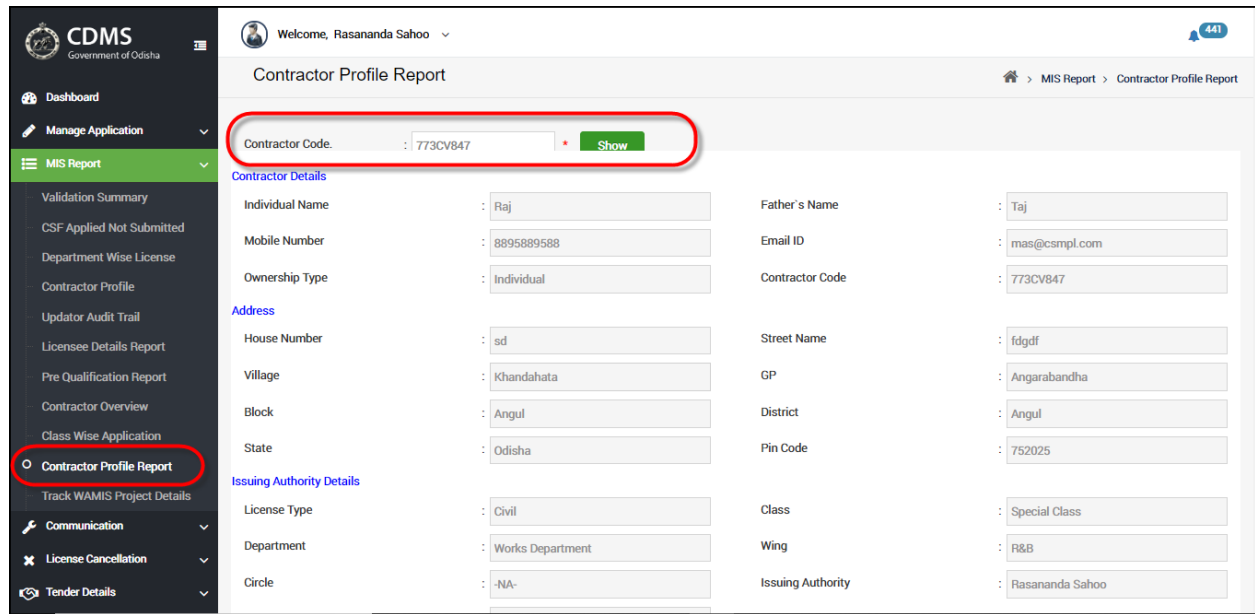
Figure 5-13 Class Wise Application Report Screen

5.10 CONTRACTOR PROFILE REPORT

View complete details about a contractor's profile by entering a valid contractor's code into the textbox. Click the Show button to see the entire profile information of the contractor such as basic details, address and issuing authority details. Refer **Fig. 5-14**
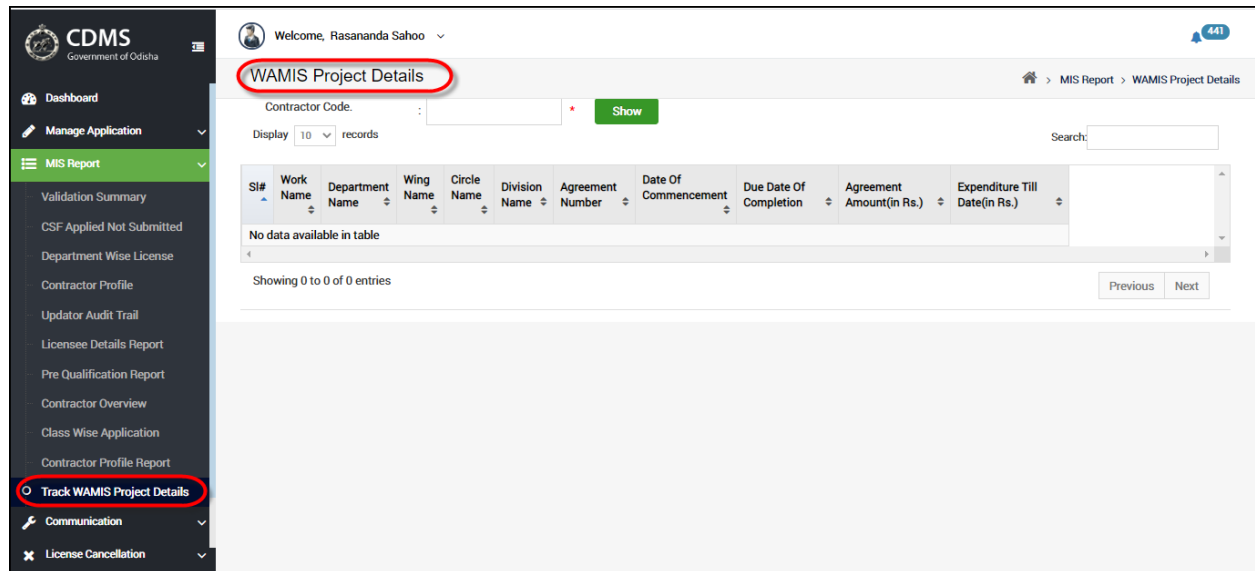
Figure 5-14 Contractor Profile Report Screen

5.11 TRACK WAMIS PROJECT DETAILS

Track complete details about the WAMIS project such as work name, department, wing, circle, division, date of commencement, due date of completion, agreement amount and expenditure done till date in a tabular format by entering the respective contractor's code in search option.
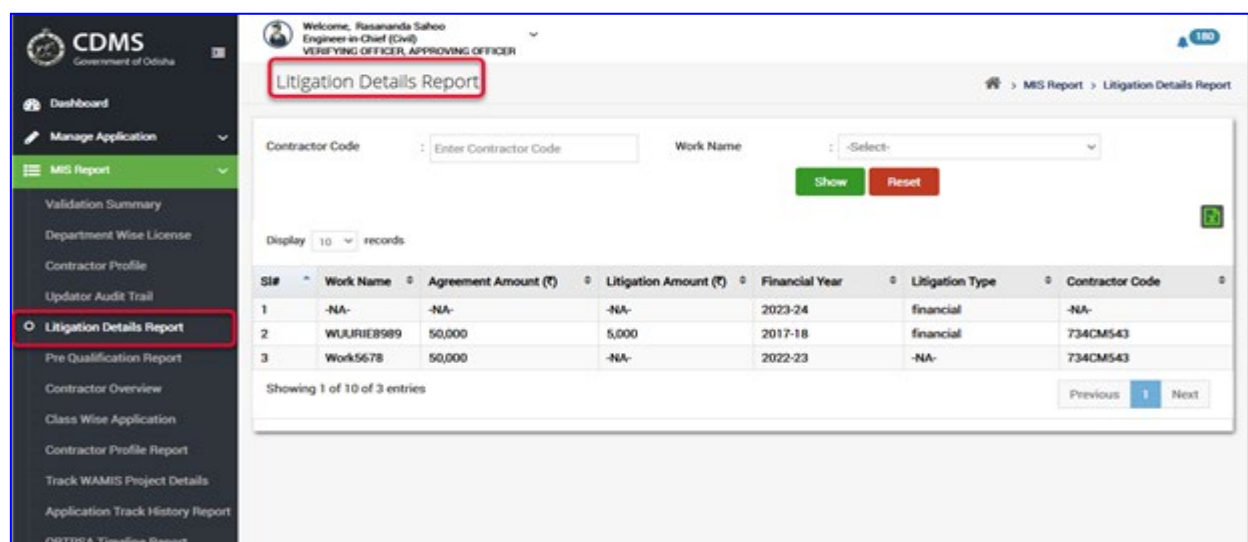
Figure 5-15 WAMIS Project Report Screen

5.12 LITIGATION DETAILS REPORT

View detailed report on list of the litigations filed, with agreement amount, litigation amount, financial year, litigation type and contractor code in the **Litigation Details Report** link.
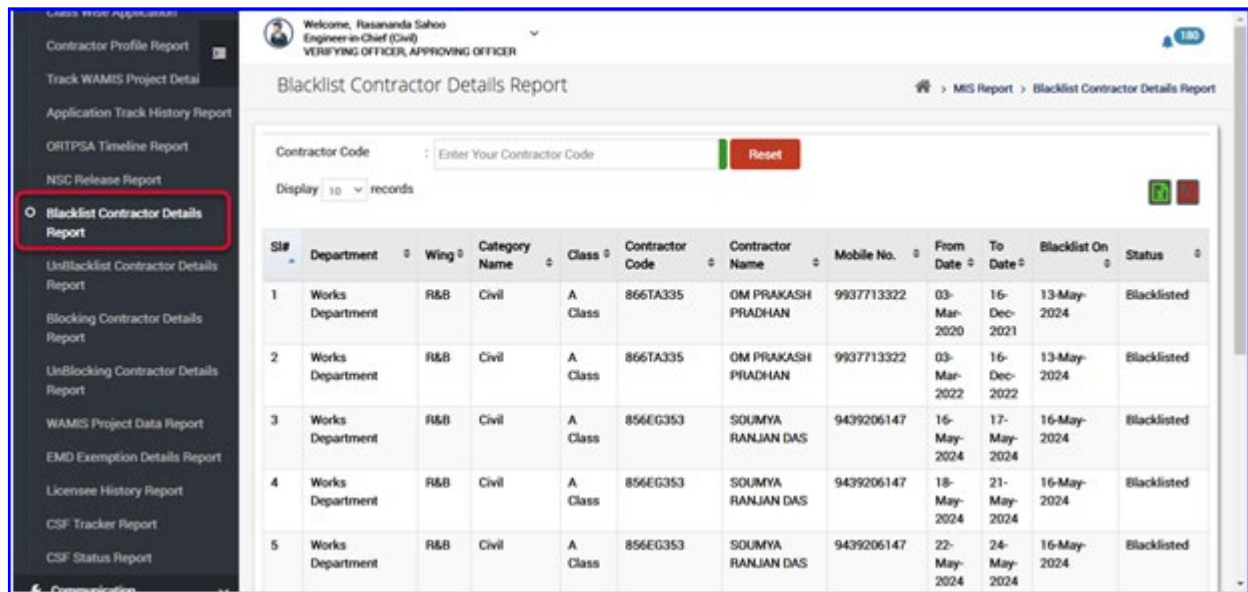
Figure 5-16 Litigation Details Report Screen

- Filter the report on the basis of Contractor Code and Work Name, and click on the **Search** button.

5.13 BLACKLIST CONTRACTOR DETAILS REPORT

View complete report on blacklisted contractor details, with department name, wing, category name, class, contractor code, mobile number and other details in a tabular format in the **Blacklist Contractor Details** Report.
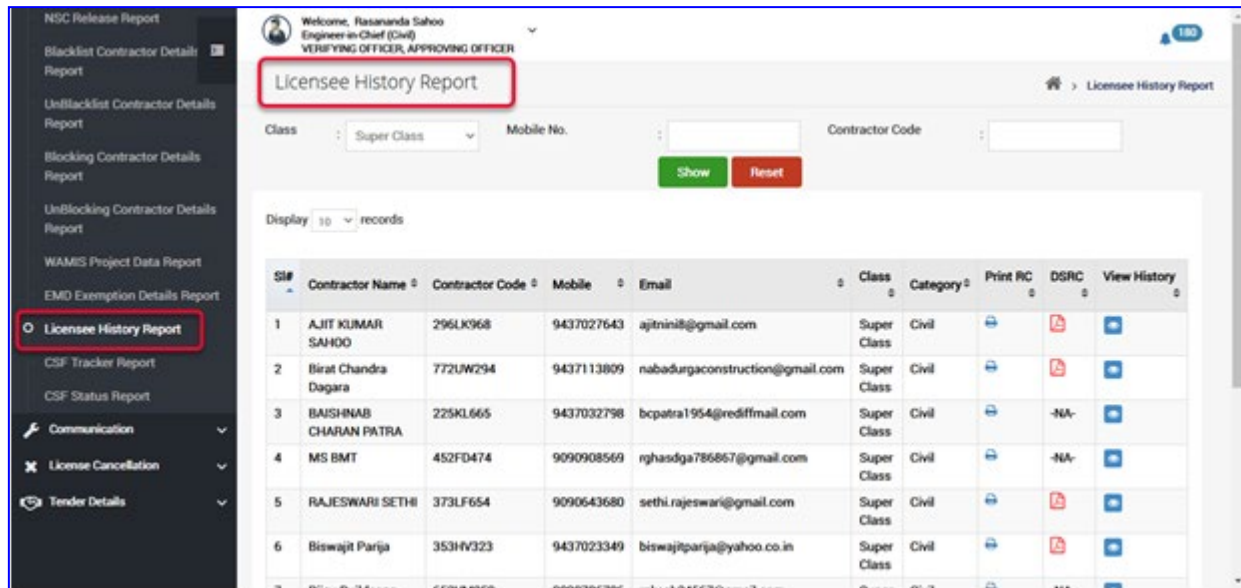

Figure 5-17 Blacklist Contractor Details Report Screen

- Filter the report entering the **Contractor Code** in the textbox provided.

- Download the file in excel sheet or pdf file format, clicking the respective excel and pdf icon provided.

5.14 UNBLACKLIST CONTRACTOR DETAILS REPORT

View complete report on unblacklisted contractor details, with department name, wing, category name, class, contractor code, mobile number and other details in a tabular format in the **Unblacklist Contractor Details** Report.

Figure 5-18 Unblacklist Contractor Details Report Screen

- Filter the report entering the **Contractor Code** in the textbox provided.

- Download the file in excel sheet or pdf file format, clicking the respective excel and pdf icon provided.

5.15 BLOCKING CONTRACTOR DETAILS REPORT

View complete report on blocked contractor details, with department name, wing, category name, class, contractor code, mobile number and other details in a tabular format in the **Blocking Contractor Details** Report.

Figure 5-19 Blocking Contractor Details Report Screen

- Filter the report entering the **Contractor Code** in the textbox provided.

- Download the file in excel sheet or pdf file format, clicking the respective excel and pdf icon provided.

5.16 UNBLOCKING CONTRACTOR DETAILS REPORT

View complete report on unblocked contractor details, with department name, wing, category name, class, contractor code, mobile number and other details in a tabular format in the **Unblocking Contractor Details** Report.

Figure 5-20 Unblocking Contractor Details Report Screen

- Filter the report entering the **Contractor Code** in the textbox provided.

- Download the file in excel sheet or pdf file format, clicking the respective excel and pdf icon provided.

5.17 LICENSEE HISTORY REPORT

View detailed report on list of the licensee and respective list of the documents issued such as RC, DSRC and other information in the **Licensee History Report** link.

Figure 5-21 Licensee History Report Screen

- Filter the report selecting the Contractor Class, Enter the Mobile Number and Contractor Code in the textbox provided, and click on **Show** button.

- To take a print out of the certificate issued, click on the **Print** Icon.

- To download the pdf file, click on the **pdf** icon.

- To view the list of actions taken with respect to the Contractor Name, click on the **View History** icon.

5.18 CSF STATUS REPORT

View the total number of CSF requests with current status such as Pending, Action Taken, Action Taken on Current Date and Approved in the **CSF Status Report** link.

Figure 5-22 CSF Status Report Screen

- Enter the From Date and To Date. Select the Class of the Contractor and click on Show button to filter the record data.

6   COMMUNICATION

To inform or communicate any update to different stakeholders, the system provided Communication tab. Here, administrative users can use it to communicate important information like any update, notice, or other details by sending a SMS or email to the officers or contractors.
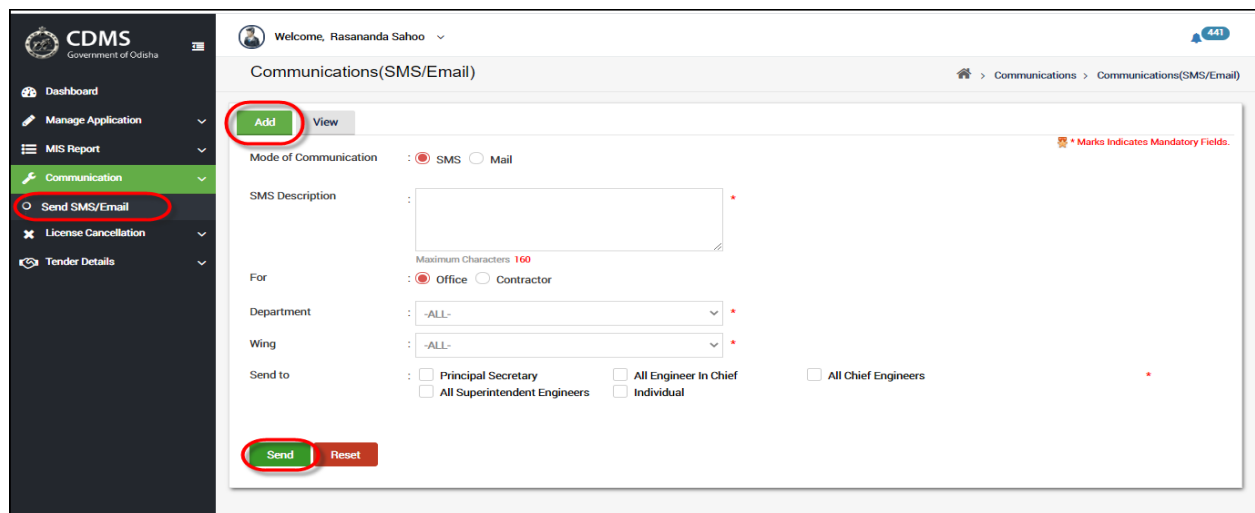
Figure 6-1 Communication Screen

6.1 SEND SMS/EMAIL

Send a SMS or email to the office or contractor by selecting different options and filling necessary details in the Communication (SMS/Email) form.

Figure 6-2 Send SMS/Email – Add- Screen

Add SMS/email information in the Add Tab. Configure it by following the mentioned steps

- Select either SMS or Email as your preferred mode of communication

a) If SMS is your mode of communication, then –

  - Enter a description for the SMS

  - Select the radio button for whom the SMS is to be sent.

  - If the SMS is sent for officers, then select the department or keep it for everyone, select the wing or keep it for everyone.

  - Choose whom to send from provided options and click on send button.

  - If the SMS is to be sent for contractors, referring to the screen shared below,
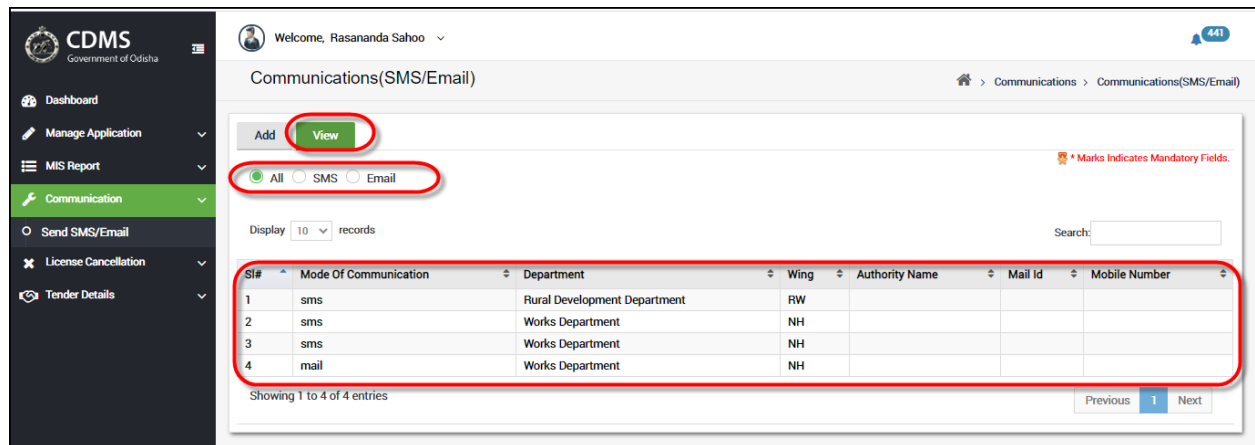
  - Select the class or keep the SMS for everyone

  - Choose either Approved or All from the options

  - Click on **Send** button.

b) If Email is your mode of communication, then –

  - Enter a subject for the email.

- Enter the text for the mail body

- Select the radio button for whom the SMS is to be sent.

- If the SMS is sent for officers, then select the department or keep it for everyone, select the wing or keep it for everyone.

- If the SMS is to be sent for contractors,

- Select the class or keep the SMS for everyone

- Choose either Approved or All from the options

- Click on **Send** button.

A Reset button is here for re-filling the SMS/Email details. Click the button to remove the details filled and re-enter them again.

View all the SMS or email that has been configured in the add tab and send to the respective stakeholders. Refer **Fig. 6-3**

Figure 6-3 Send SMS/Email – View- Screen

In the View tab, the mode of communication, department, wing, authority name, mail ID, mobile number is shown in a list.

Filter the results by selecting only SMS or email sent or choose All to the list together.

Use the search option to find details by mode of communication, or department, or wing.

7   LICENSE CANCELLATION

The license of the contractor can be cancelled under three circumstances-

- Surrender by the contractor

- Death of the contractor

- Blacklist

Then, you need to the do the verification procedure for any surrender/allegation or cancellation in case of death and approve the same under the License Cancellation tab.
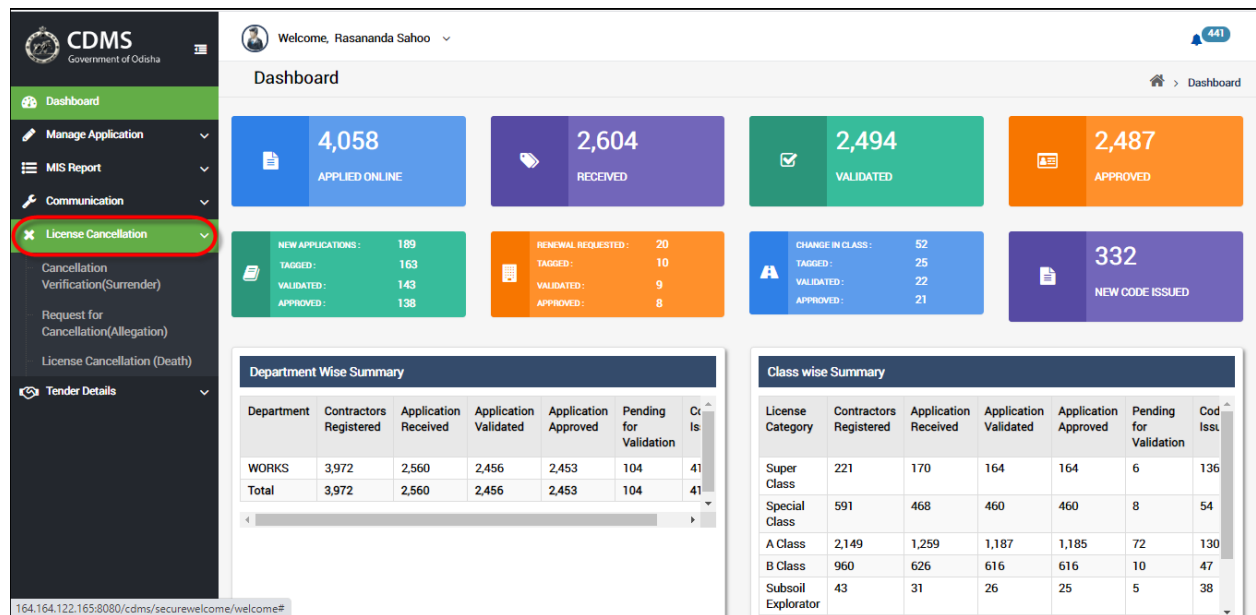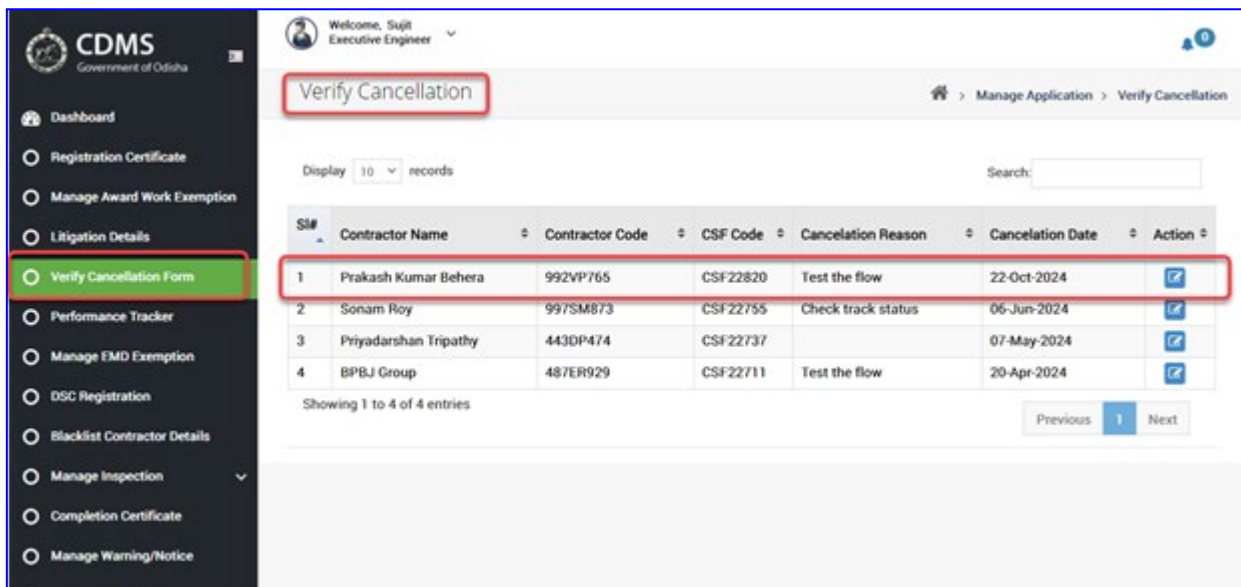
Figure 7-1 License Cancellation Screen

7.1 CANCELLATION VERIFICATION (SURRENDER)

The registered contractor can surrender its license issued the license issuing authority under different circumstances. Once the contractor has applied for license cancellation, the application is forwarded to the License issuing authority for further actions for its approval.

After tagging of the cancelled license, the license issuing authority needs to verify the details entered. For doing so, click the Cancellation Verification tab as highlighted in the screen below-

Figure 7-2 Cancellation Verification (Surrender) Screen

Here, the Cancellation Verification in case of license surrender is displayed. View the applicant name, mobile number, category, class, contractor registration number and action such as hold/verify in the screen shared above.

Filter the result entering the contractor's name, code or other details in the search option.

- Click on the **Take Action** button for respective Contractor Code.
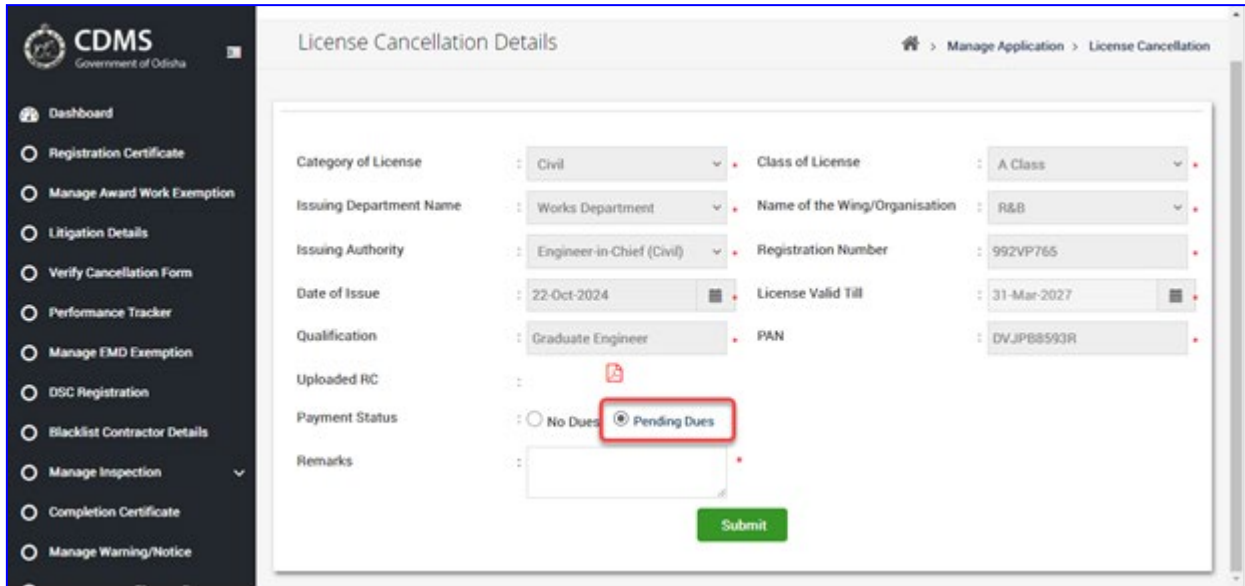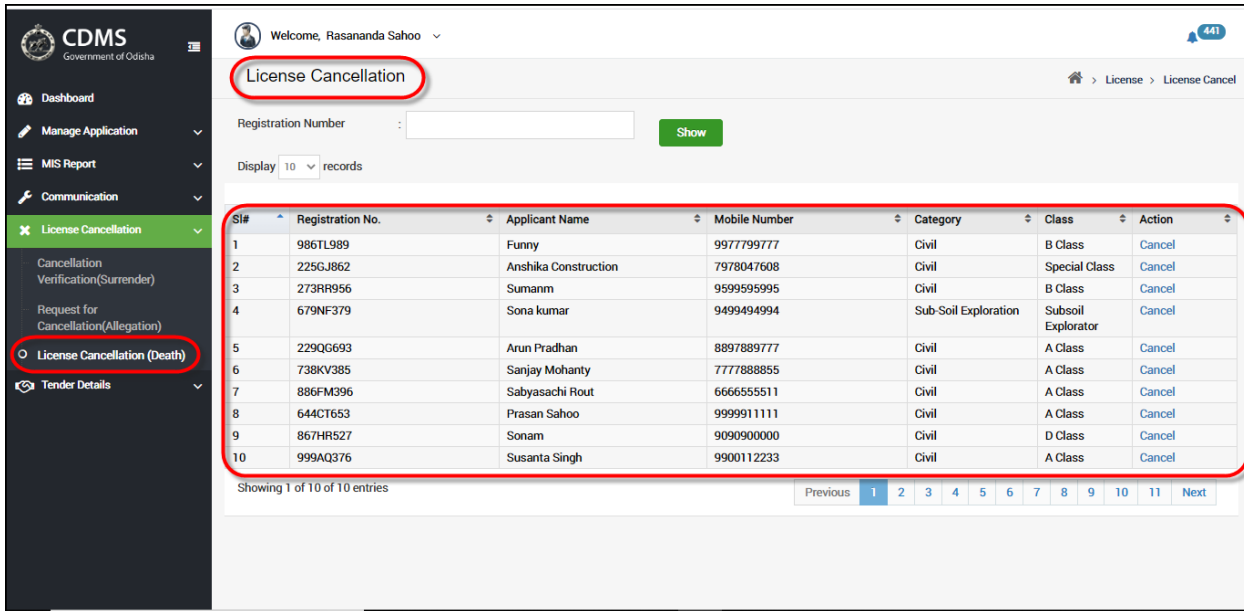
Figure 7-3 Cancellation Verification (Surrender) Screen

- The details of the license to be cancelled is already provided in the license cancellation details.

- Update the payment status.

- If dues are Pending, then select the respective option, add remarks and click on Submit button.

- If there are no dues, then select the respective option, upload NOC Certification and click on **Submit** button.

7.2 LICENSE CANCELLATION (DEATH)

The license of the contractor can be cancelled by the License Issuing Authority in case of contractor's death by providing the requisite documents and proof for the same.

Figure 7-4 License Cancellation (Death) Screen

For the list of license applications of the contractors displayed, the authority needs to click the Cancel link for the respective Regd. No. whose license needs to be cancelled-

Figure 7-5 License Cancel (Death) Screen

Doing so, you will be redirected to the License cancel screen -

- Registration number, class, validity and issuing authority is fetched directly from the database.

- Enter the name of the Legal Heir of the dead contractor.

- Select the Date of Death of the contractor from the calendar control.

- Enter the Relationship of the License in the given space.

- Click the Choose File button to upload the Legal Heir certificate and Death Certificate.

- Click the Save As Draft button to save the application in the draft mode.

Moving back to the license cancellation screen, click the Confirm button for the respective license.

Figure 7-6 License Cancellation Details (Death) Screen

Verify the license cancellation details in the screen displayed and click the Confirm button.

Doing so, a successful message is generated that the contractor is cancelled successfully as shown below-

Figure 7-7 License Cancellation Successful (Death) Screen

8   TENDER DETAILS

For adding and managing all the information about any tender submitted in the organization, the system has created the "**Tender Details**" tab. Here save the tender details such as basic info, fee, tender documents, and edit or delete the eProcurement Tender ID in the **Manage Tender Information** section.

Figure 8-1 Tender Details Screen
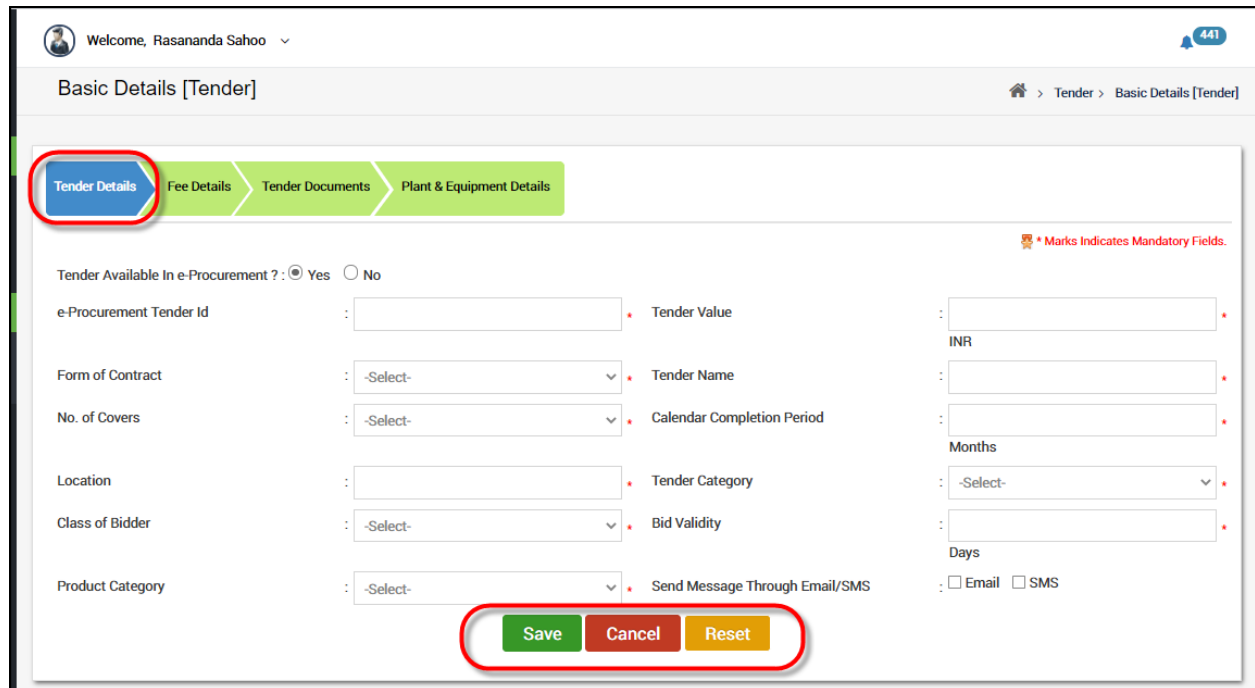
8.1 ADD TENDER INFORMATION

Add basic details, tender fee, tender document and plant and equipment details in the system by clicking the "Add Tender Information" tab.

A. Add Basic Details

Add basic details of the tender, as directed in the screen below –

Figure 8-2 Basic Tender Details Screen

- Select either Yes or No if the Tender is available in e-Procurement.

- Enter the eProcurement Tender ID followed by value of the tender

- Select the form of contract followed by tender name

- Select the number of covers followed by the number of the month, the tender needs to complete

- Enter the location followed by tender category.

- Select the class and bid validity date

- Select the product category.

- Select the mode of communication. Choose from either email or SMS from the provided options.

- Click on **Save** button.

Choose Cancel button to cancel the details updated for the tender.

A Reset button is also here to remove the entered tender details and re-enter the details again.

On clicking the Save button, confirm the data entered to proceed further.

B. Fee Details

Add fee details of the tender, as directed in the screen below –
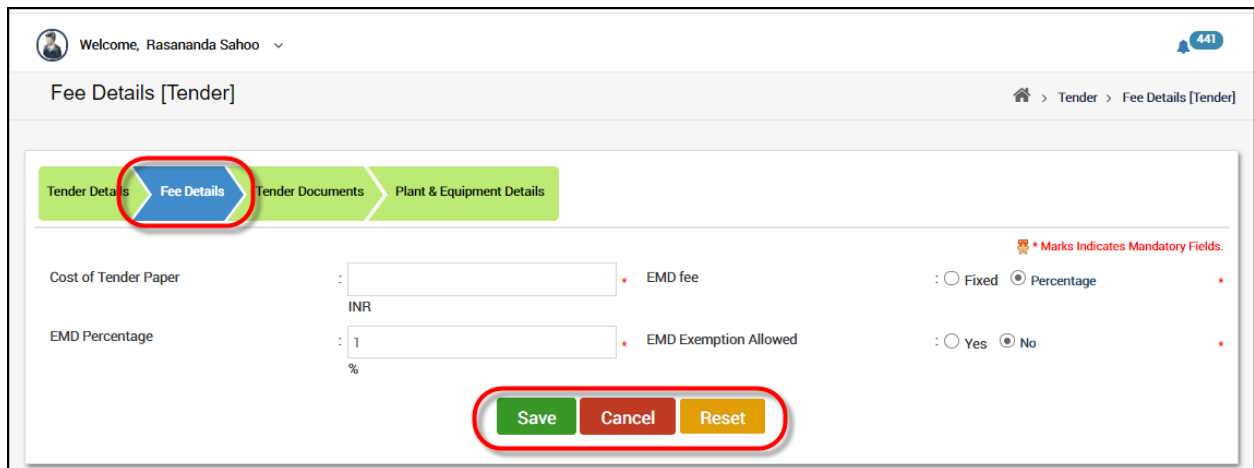
Figure 8-3 Tender Fee Details Screen

- Enter the cost of the Tender Paper

- Choose the EMD fee either from fixed or percentage type.

  - If fixed is selected, then enter the EMD amount.

  - If percentage is selected, then enter the EMD percentage.

- Select from either Yes of No, if EMD exemption is allowed.

- Click on **Save** Button

Choose Cancel button to cancel the details updated for the tender.

A Reset button is also here to remove the entered tender details and re-enter the details again.

On clicking the Save button, then you need to confirm the data entered to proceed further.

C. Tender Documents

Submit the tender documents in the system, as directed in the screen below –
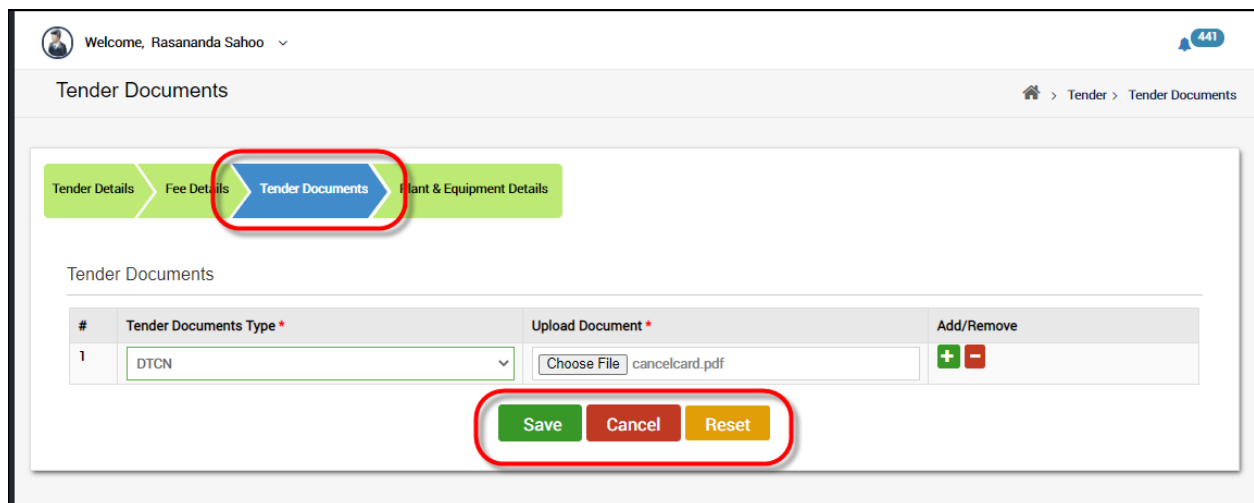
Figure 8-4 Tender Documents Screen

- Select the type of document to upload

- Choose the file from your system and upload. The Plus icon and Minus icon in the tender documents is there for, adding or subtracting documents from the list.

- Click on Save button

Choose Cancel button to cancel the details updated for the tender.

A Reset button is also here to remove the entered tender details and re-enter the details again.

On clicking the Save button, then you need to confirm the data entered to proceed further.

D. Plants & Equipment Details

Add Plants and Equipment details of the tender, as directed in the screen below –

Figure 8-5 Plants & Equipment Details Screen

- Select the list of plants and equipment from drop-down

- Enter the minimum requirement and full marks of the selected plant or equipment.

- The Plus icon and Minus icon in this section is there for, adding or subtracting plants and equipment details from the list.

- Click on **Save** button
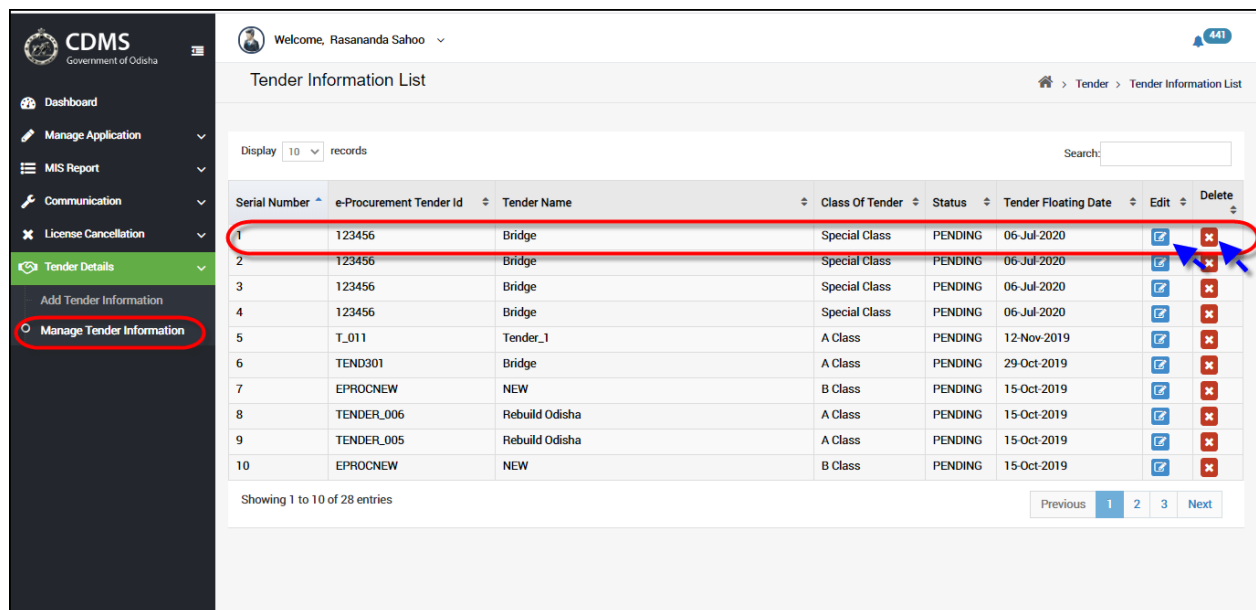
Choose Cancel button to cancel the details updated for the tender.

A Reset button is also here to remove the entered tender details and re-enter the details again.

On clicking the Save button, then you need to confirm the data entered and save it to the system.

8.2 MANAGE TENDER INFORMATION

In the "Manage Tender Information" tab, the administrative user has the provision to view the complete list of tender details added to the system, and edit or delete them as per the requirement. The system provides action buttons to update or remove the tender information here. Refer to the screen shared below.

Figure 8-6 Manage Tender Information Screen

Here, in Tender Information List, the eProcurement Tender ID, Tender Name, Class of Tender, status, Tender floating date, and action button for editing and deleting the details are given.

Search option is also provided to filter the results.

a) **Edit -** To make any changes or update, click the edit ☑ button to the selected eProcurement ID and get directed to the edit confirmation screen.

163

Figure 8-7 Edit Tender Information Confirmation Window

Click on OK to the pop-up window, the system will redirect back to the basic tender information screen.

Figure 8-8 Edit Basic Tender Information Screen

Update all the information such as basic, fee, tender doocuments submitted, and plant and document details.

Make the changes and click on update button.

The data updated will be saved successfully.

b) **Delete-** To remove added tender details, click the delete ❌ button to the selected eProcurement ID and get directed to the delete confirmation screen.

Figure 8-9 Delete Tender Information Screen

System will ask for your confirmation.

Are you sure to delete the record?

Select the OK button to remove it or choose Cancel to keep the data as it is.

8.3 MANAGE TENDER SECURITY DEPOSIT

In the "Manage Tender Security Deposit" tab, the administrative user has the provision to add the details of the security deposit to the system. The system provides action buttons to add the tender security deposit information here. Refer to the screen shared below.
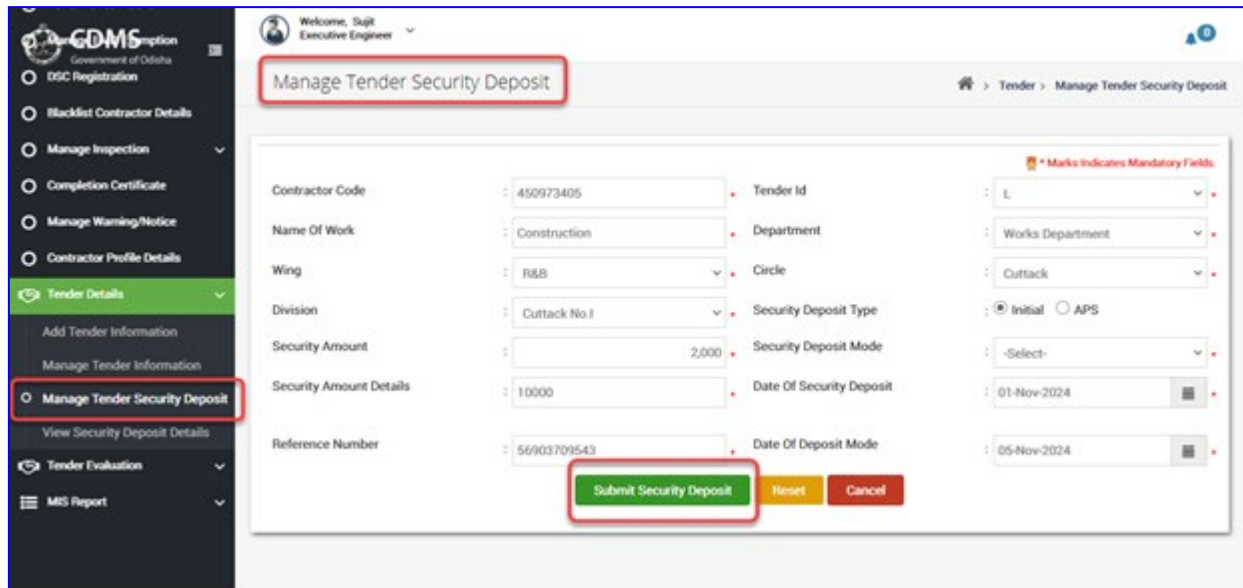
Figure 8-10 Manage Tender Security Deposit Screen
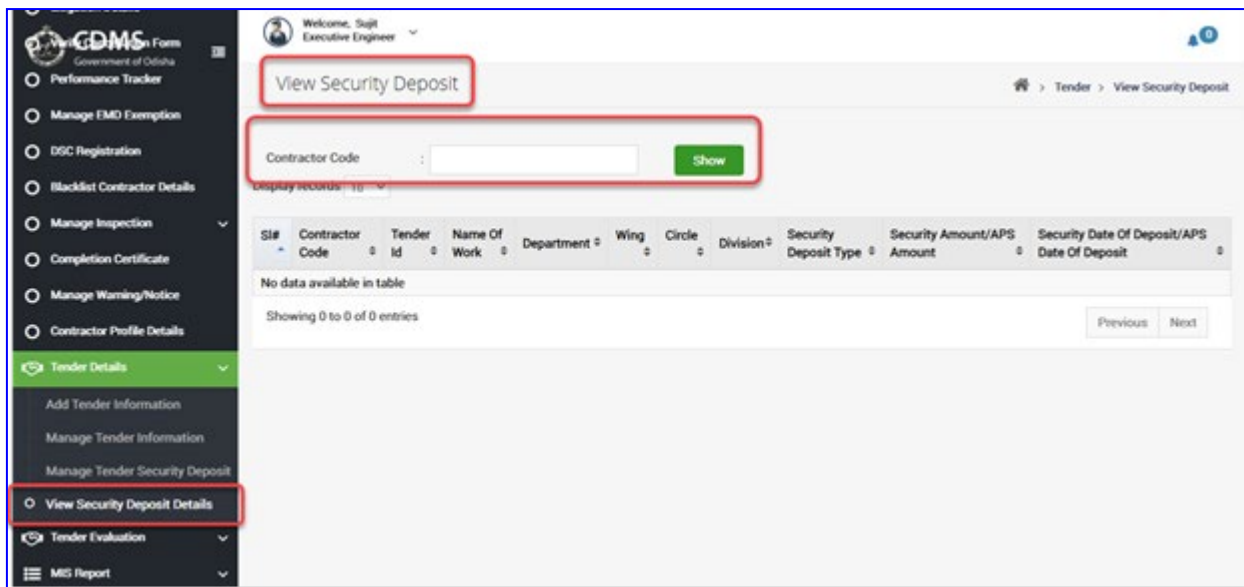
- Here, in Tender Security Deposit details, enter the Contractor Code.

- Select the Tender ID.

- Enter the Name of the Work.

- Select the Name of the Department.

- Select the Wing.

- Select the Type of Security Deposit either as - Initial or APS.

- Enter the Amount of the Security Deposit.

- Select the Mode of the Security Deposit.

- Enter the Security Amount Details.

- Select the Date of Security Deposit.

- Enter the Reference Number.

- Select the Date of Deposit Mode.

- Click on the **Submit Security Deposit** button.

8.4 VIEW SECURITY DEPOSIT DETAILS

In the "View Security Deposit" tab, the administrative user has the provision to view the details of the security deposit to the system. Refer to the screen shared below.

Figure 8-11 View Security Deposit Screen

The Contractor Code, Tender ID, Name of the Work, Department, Wing, Circle, Division, Security Deposit Type, Security Deposit Type, Security Amount/APS Type, and Security Date of Deposit/APS Date of Deposit are provided in this section.
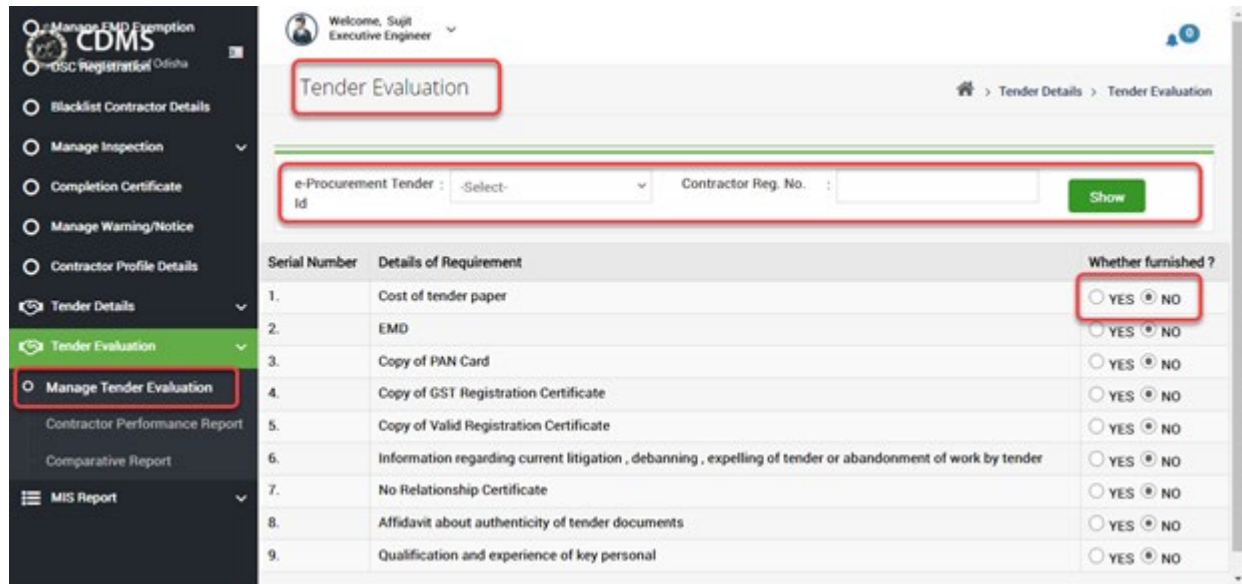
9 TENDER EVALUATION

This link enables the authorized user to manage the tender evaluation, view the contractor performance report and get a comparative record data on e-Procurement Tender ID.

9.1 MANAGE TENDER EVALUATION

View and manage the tender evaluation details, i.e. whether details of the requirement for the e-Procurement ID are furnished by the Contractor or not in the **Manage Tender Evaluation** link.

Figure 9-1 Manage Tender Evaluation Screen

- Filter the record data. Select the e-Procurement ID and enter the Contractor Registration Number, then click on the **Show** button.

- Now, select either from Yes or No option and confirm the details and respective requirement status in this section.

9.2   CONTRACTOR PERFORMANCE REPORT

View Contractor Code wise project performance report in this link. Refer to the screen shared below.
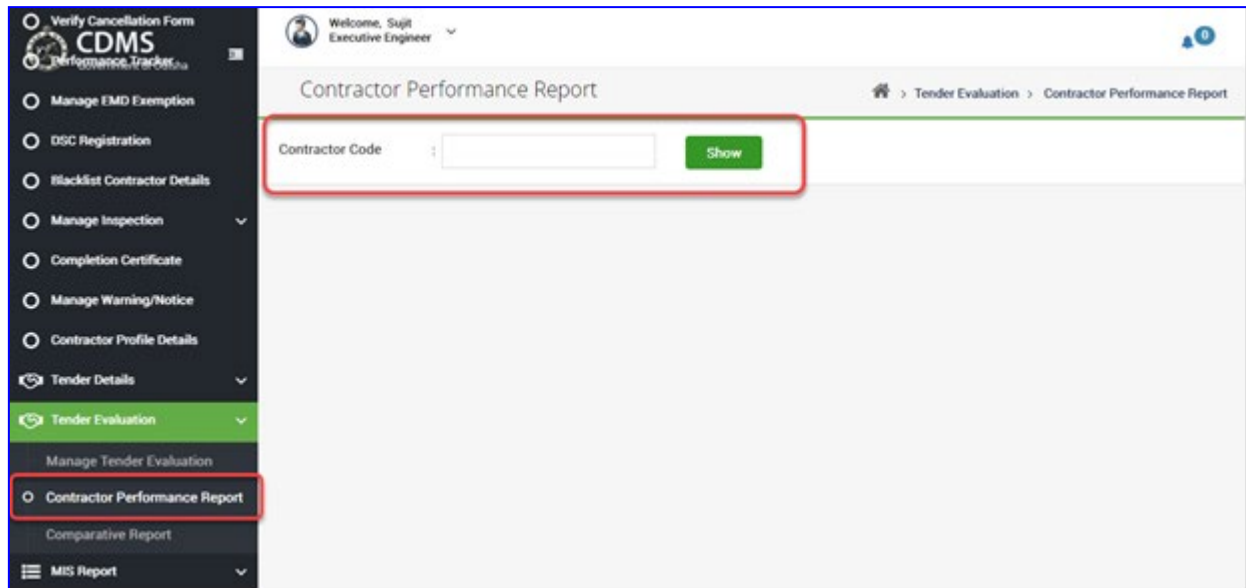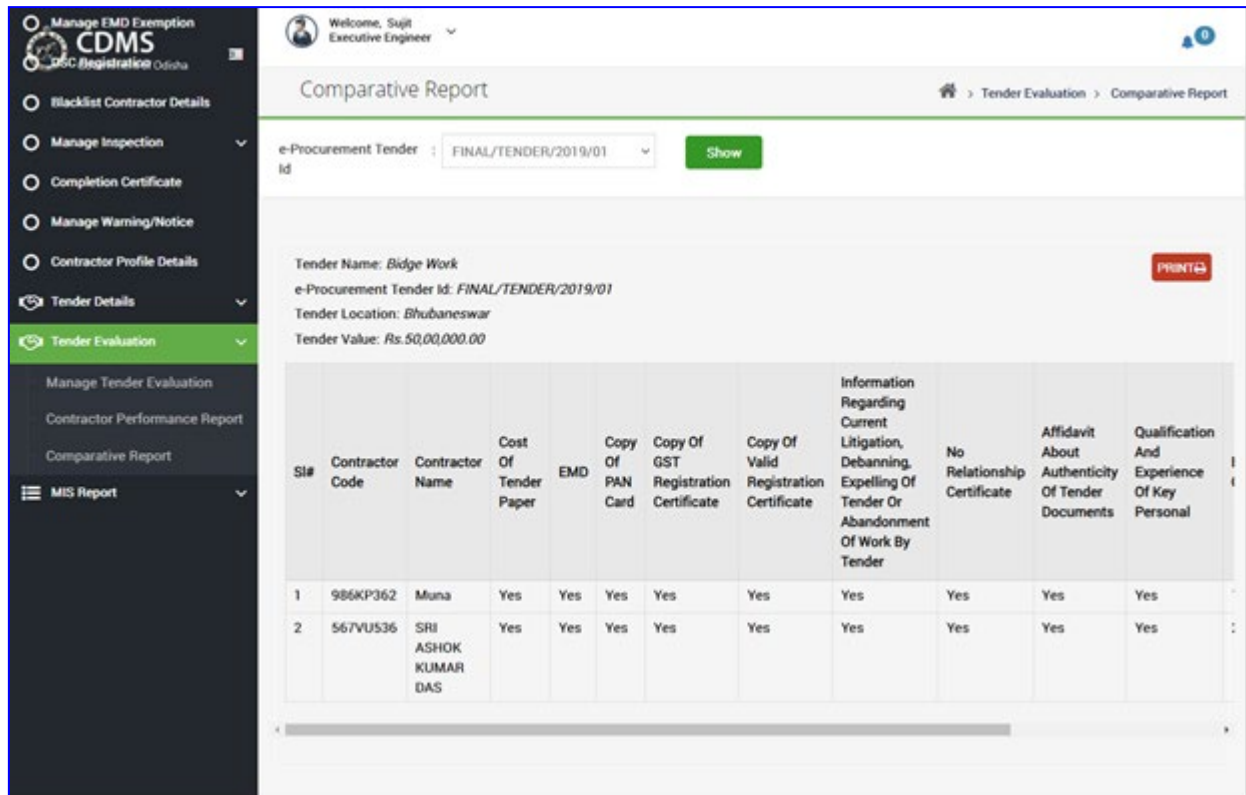
Figure 9-2 Contractor Performance Report Screen

- Enter the Contractor Code and click on **Show** button to view respective project performance report.

9.3 COMPARATIVE REPORT

View a comparative report on e-procurement tender ID, with respective contractor code, contractor name, EMD and PAN Card, GST Registration Certificate, Valid Registration Certificate status, and other details in the Comparative Report.
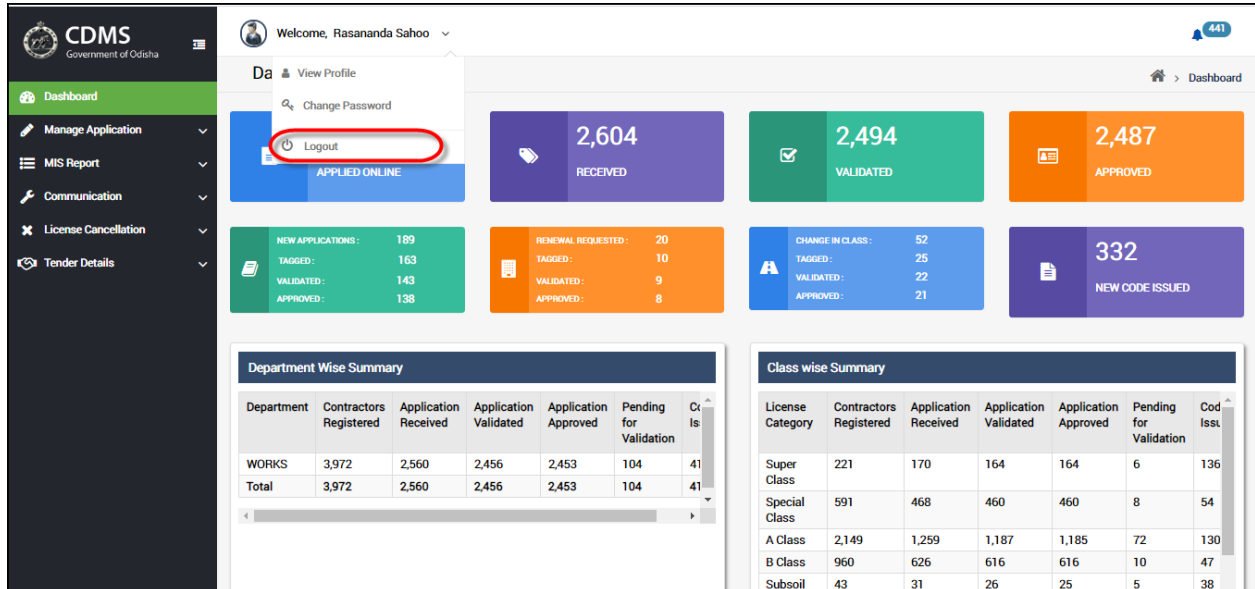
Figure 9-3 Comparative Report Screen

- Enter the e-Procurement Tender Number, and then click on **Show** button.

- On clicking the show button, the details of the Tender, e-Procurement Tender ID, Tender Location and other related information are displayed in a table.

- Take a print out of the e-Procurement Tender, clicking on the **Print** button.

10 LOGOUT

After the login session is over, Logout from the portal clicking the "logout" Take reference from the encircled button in **Fig. 9-1** below.

Figure 10-1- Logout Screen

Tap to the ⏻ symbol to come out of the application.

Table of Figures