ONLINE PFC/PC (Purchase Finalization Committee/Purchase Committee) Creation (paperless process)

Note: Currently the system is available for purchase from Institute Funds only. IRD purchases will follow in coming months.

Purchase Finalization Committee is constituted for procurement of Goods/Services in the Institute.

A purchase finalization committee consist of Faculty/Non-Faculty members (Group A) with different capacities such as Buyer, Member, Expert, Chairperson, and Competent Authority etc. It includes details of Item/Service to be procured, nature of goods, import/indigenous, GeM/Non-GeM, Budget and Amount under which purchase is to be made within the buyer’s department.

Buyer is the main member in a PFC Committee who has the overall responsibility for its execution. Before submitting the PFC/PC, the buyer has to take consent from the committee members in person to become a member.

PFC/PC creation can be initiated by the roles:

1. Department Stores (on behalf of Buyer)
2. Faculty/Group A (Buyer)

Detailed process of PFC to be created by “Department Stores” (on behalf of Buyer)

Step -1 - Department Store need to login to ERP Eadmin portal (https://eadmin.iitd.ac.in/IITD-0/login) using kerberos credentials and select their role as “Department Store” and navigate to following link on left side menu: -

Store & Purchase ->Operational links ->PFC/PC Creation-Storekeeper.

Step-2 – After clicking on PFC/PC Creation-Storekeeper link a list page appear on the screen with department dropdown on the top.

All departments/centres/schools/sections/units assigned to the concerned employee shall be visible and needs to select the department of buyer for which purchase is to be made and then click on “ADD” button.

A PFC form will appear on screen. Department Store needs to fill all the following details in the form and submit it to the Buyer:

1. Name of Dept./Centre/School/Program/Section/Unit etc. (where the funds belong to):
2. Nature of Purchase (Consumable/Non Consumable):
3. Channel of the Purchase (GeM/Non-GeM):
4. Items to be Imported (Yes/No):
5. Is the purchase to be pre-audited?
6. Item Group:
7. Details of the item to be Procured:
8. Source of Funding:
9. Estimated Cost:
10. Details of the Committee:

Step-3 – Submitted PFC form will get lined up on the buyer’s login, Buyer (i.e., Faculty or Group A employee) need to login to ERP Eadmin portal using kerberos credentials and select their role as “Faculty or Group-A employee” and navigate to following link on left hand menu.

Store & Purchase >Operational link >PFC/PC Creation.
Step-4 – After clicking on **PFC/PC Creation** a list page appears on the screen with department dropdown on the top.

A faculty /Group A employee may be associated with multiple departments, so he needs to select the department for which Department Store-In charge has drafted the PFC (in case of more than one department affiliation).

The drafted PFC will get lined up on the list page, **Buyer needs to select the drafted PFC and click on “EDIT” button**, drafted PFC form will get open in editable form, all the details which is filled by the department Stores-In charge in the PFC is shown as pre-filled and buyer can change it as per his/her requirement and before final submission he/she also need to click on mandatory certified checkbox.

**Depending on the PFC amount, Submitted PFC by the buyer will get lined-up with following roles for the approval. Indigenous PFC creation is not mandatory in case of purchases upto Rs. 25,000/-**.

<table>
<thead>
<tr>
<th>Roles</th>
<th>PFC amount</th>
<th>Officer-Incharge (Purchase) (If exists in any Dept./Centre)</th>
<th>Department Head/Purchase Head</th>
<th>DD(O)</th>
<th>Director</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Rs.1 to 10 Lakhs</td>
<td>Forward</td>
<td>Approved</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rs.10 Lakhs to 25 lakhs</td>
<td>Forward</td>
<td>Forward</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rs. 25 Lakhs or above</td>
<td>Forward</td>
<td>Forward</td>
<td>Forward</td>
<td>Approved</td>
</tr>
</tbody>
</table>

Each approver role also has revert functionality, if approver reverts back the PFC for any queries to the buyer then the reverted PFC will get opened in the editable form on the buyer login. Now Buyer can make the changes as per the approver remarks and submit again, resubmitted PFC will follow the full approval flow again. Printable report is also available after full approval.

**Detailed process of PFC to be created by “Buyer” (Faculty/Group A)**

In ERP, Faculty/Group A officers can initiate the PFC creation themselves also. For this Buyer need to follow the Step-3 and 4 and but this time he/she needs to click on “ADD” button instead of “EDIT” As all the details in PFC now to be filled by buyer.

Submitted PFC by buyer will get lined up on the Department Stores login just for the final submission and intimation, details filled by the buyer cannot be changed by Department Stores.

From there on system will follow the same approval flow as mentioned above depending on up the PFC Amount.

**File Uploads**

File upload option is provided to upload **Non-GeM availability report**, any special approval or any other relevant document. This option shall be available even after the approval of the PFC. Old approval obtained manually in case of PFCs created before 01.04.2022 and need extension may be uploaded and a reference be also mentioned in remarks with justification.

**Mails Triggered**

Emails will be triggered after buyer submission to approving authorities. In case any PFC is reverted, mail will also get triggered to the buyer for necessary action. On approval, mail will be triggered to all committee members.
**Approvals**

A new role of “Officer Incharge (Purchase)” has been created for those academic entities where the PFCs are required to be vetted by them before forwarding to the Head. The HoDs of all academic dept./centres/schools etc. will have to choose the role ‘Head’ for approving PFC. Another new role of “Purchase Head” has been introduced for the role of Head for PFC approvals in non-academic sections/units/offices where formal HoD does not exist. Deputy Director (Operations) will use DDO role to accord approvals.

The Chairperson will be nominated by the Director in case the PFC amount exceeds 25 Lakh. Buyer or HoD or DD(O) may suggest a chairperson (Name and employee code, Department) in the remarks field for the consideration of the Director.

**Cancellations and Deletions/Post Approval Updations**

The PFCs can be deleted if not lined up for any approver. The PFCs can be cancelled only by buyer once the PFC is finally approved (because of certain constraints) and also can be cancelled once it is reverted back to buyer during the approval process. The Department Stores or Buyer can cancel the approved PFC by clicking “View” button and then clicking “Cancel PC/PFC” button provided at the bottom. The PFC cancelled after final approval can be used while creating new PFCs for continuity purpose.

The Department Stores or Buyer can modify certain fields even after approval. These are:

1. **Channel of the Purchase (GeM/Non-GeM)**
   It is suggested to select GeM initially if the buyer is not sure about the channel of purchase and change to Non-GeM while finalising the purchase after PFC approval, if required. In Non-GeM cases, non-availability report of GeM will be required to be uploaded.

2. **Items to be imported (Yes/No)**
   This field is editable even after approval of PFC in case there is a change in Import/Indigenous type of procurement.

3. **Is the purchase to be pre-audited?**
   In case item is unavailable in GeM and amount of PFC is above 5 Lakh or it is an import case then you may change this value even after approval of PFC.

4. **Whether To Upload On NIC (E-procurement) Or Not?**
   Only informative field. Can be edited even after approval of PFC.

5. **GST Concession Certificate?**
   In case GST concession is applicable in the purchase, then this field can be edited even after PFC approval. The consent of vendor in the form of an email or any other relevant document like quotation can be uploaded as a supporting document. The GST concession form can then be obtained through online process (when implemented).

The Department Stores or Buyer can modify the above fields by clicking “View” button, modifying the fields and clicking “Update” button provided at the bottom.

**Funds Commitment/Availability**

Funds are committed immediately on the submission by buyer. In case a PFC is cancelled, the funds get uncommitted and are again made available for use in department budget. The budget-head wise funds availability report has been provided in Stores & Purchase heading under Reports.