

File Management & Procurement Tracking Solution

"Streamlining procurement management with accuracy and efficiency!"

This system addresses the challenges of managing and tracking procurement files in a large tertiary care setup. Leveraging Google Sheets and Forms, it provides a user-friendly platform to handle file entries, updates, and real-time reporting. With features like dynamic dashboards, advanced search and filter options, and automated reporting, it ensures accurate and up-to-date insights for seamless procurement workflows. Designed for scalability and ease of use, it empowers non-technical users to manage complex processes with minimal effort.

Objective:

To address inefficiencies in tracking, managing, and reporting on procurement files in a large tertiary care setup. The aim is to ensure accurate, real-time updates, improve reporting accuracy, and provide stakeholders with actionable insights to streamline procurement workflows.

Problem:

- 1. Large Procurement Volumes:**
 - a. Managing hundreds of procurement files, often worth billions of rupees, posed logistical challenges.
 - b. Files were at various stages, such as AON (Acceptance of Necessity), bidding, financial review, EAS (Expenditure Angle Sanction), Supply Order or under delivery.
 - 2. Manual Tracking Issues:**
 - a. Prone to inaccuracies, delays, and inconsistencies.
 - b. Cumbersome for non-technical staff to update and retrieve data.
 - 3. Reporting Challenges:**
 - a. Creating accurate, up-to-date reports manually consumed significant time and effort.
 - b. Reports were often outdated and required repeated corrections.
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Solution:

A **Google Sheets-based File Management System** with the following attributes:

1. Simple deployment and accessibility from any location.
2. Designed for non-technical users with **form-driven data entry and updates**.
3. Automated real-time reporting and **dynamic dashboards** reflecting the current status of files.

Key Features:

1. **Dashboard with At-a-Glance Insights:**

- a. A master dashboard summarising file statuses and key metrics.
- b. Includes quick links to add or update files and view detailed reports.

2. **File Entry and Update Forms:**

- a. Custom Google Forms enable easy data entry for:
 - i. File number
 - ii. AON status
 - iii. Technical bid openings
 - iv. PNC (Price Negotiation Committee) meetings, and other relevant fields.
- b. Updates are instantly synced with the master sheet.

3. **Advanced Search and Filters:**

- a. Search by file number, procurement stage, department, or fund type.
- b. Filters for viewing files by fiscal year, month, or quarter.

4. **Dynamic Reporting:**

- a. Automated, pre-configured reports provide:
 - i. Monthly, quarterly, and fiscal year summaries.
 - ii. Financial summaries by file stage, such as AON, bidding, or technical review.
 - iii. Insights into pending approvals, CRAC statuses, and delivery schedules.

5. **Supply Order Management Integration:**

- a. Linked to procurement files for tracking:
 - i. Supply Order numbers
 - ii. Delivery due dates
 - iii. CRAC completion and pending actions.
- b. Prevents delays by offering proactive monitoring.

6. **Complex Query Implementation:**

- a. Leveraged Google Sheets' query functions for:
 - i. Financial status tracking by periods.
 - ii. Generating stage-specific reports dynamically.
- b. Provided various views to cater to diverse stakeholder needs.

7. **User-Friendly Design:**

- a. Designed for non-technical users to perform updates with minimal training.
- b. Highly replicable and scalable for use across multiple departments or organisations.

Technologies Used:

1. **Google Sheets:** A core system for data aggregation and reporting.
 2. **Google Forms:** Simplifies file entry and updates.
 3. **Google Apps Script:** Automates data syncing and complex queries for advanced reporting.
 4. **Custom Queries:** Used for dynamic filtering, financial tracking, and status reporting.
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Challenges Addressed:

- 1. Inaccurate and Delayed Manual Updates:**
 - a. Automated updates ensure real-time accuracy and consistency.
 - 2. Time-Consuming Reporting:**
 - a. Pre-built reports eliminate the need for manual data aggregation.
 - 3. Non-Technical User Accessibility:**
 - a. Simple forms and intuitive interfaces empower all users, regardless of technical expertise.
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Impact:

- 1. Streamlined File Management:**
 - a. A centralised system ensures visibility into all procurement activities.
 - b. Facilitates faster decision-making with real-time data.
 - 2. Improved Reporting Accuracy:**
 - a. Automated, up-to-date reports reduce manual errors and provide reliable insights.
 - 3. Time Savings:**
 - a. Simplified updates and reporting processes save significant time for all stakeholders.
 - 4. Enhanced Scalability:**
 - a. The system can be easily replicated and adapted for other organisations or departments.
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Visual Cues:

- 1. Dashboard:**
 - a. Highlights file statuses, procurement stages, and quick links for new entries and updates.
 - b. Provides an at-a-glance view of key metrics and actionable items.
- 2. File Entry Form:**
 - a. Simple and user-friendly form for entering new file data or updating existing records.
- 3. Automated Reports:**
 - a. Pre-configured summaries for monthly, quarterly, and fiscal year procurement data.
 - b. Financial tracking by file stage and delivery schedules.
- 4. Search and Filter Capabilities:**
 - a. Easy-to-use search interface with advanced filtering for specific criteria.
 - b. Ensures quick retrieval of file information.
- 5. Supply Order Management:**
 - a. Tracks CRAC delivery dates, due dates, and order completion statuses.
 - b. Integrates seamlessly with procurement tracking.

GeM Medical Procurement Management System				Index Sheet	New File	File Status Update Link	
contains	AON No	Bid No	File Number or Item Name	ClubMaster	New File Entry	Click here to UPDATE STATUS	
AND							
Search Results							
Timestamp	File No	Date	Fund	Type	Dept	Nomenclature	Total Items
26/09/2023 10:19:11	MS/INE/DGLP/38/23	24/07/2023	DGLP	Non-Expendable	Orthopaedics	Sqttqy upqrqtqx xriil Systqm	1
26/09/2023 09:33:03	RE/D23/IFA/533	31/08/2023	DGLP	Expendable	CTVS OT	ChsRed brsgdgd phyfesRer sgze 2/0.75cm green/Clhe,1/2 cgrcle Rasper phgrR/Rasper25 mm dhible needle	20
26/09/2023 09:29:32	RE/D23/IFA/454	12/09/2023	DGLP	Expendable	Endocrinology	TESTOSTERONE CT RIS(100 TEST)	8
26/09/2023 09:24:30	RE/D23/IFA/433	11/09/2023	DGLP	Expendable	Pathology	GeneXperR MTQ/RIF UIIRs CsR nh GXMTQ/RIF-UIIRs (Isck hf 10 CsrRtgdge)	2
26/09/2023 08:46:37	RE/D23/IFA/420	04/09/2023	DGLP	Expendable	Recon Surgery	Csloghm shlphsRe pelgsRsble phvder fhr sngrRgbbRgc delgvery 10CC vgrh KIT Qgh chmphsgRRes	57
26/09/2023 08:41:24	RE/D23/IFA/4233	08/09/2023	DGLP	Expendable	Pediatrics	Sdhesgve RrnspsrenR dresgng 8x6cm (Qhx hf 50 lgeces) (eqhgvslenR Rh Vyghn Demsfjm 38.08.06)	16
26/09/2023 08:35:24	RE/D23/IFA/427	06/09/2023	DGLP	Expendable	CTVS OT	LesdercsRh 18 G 18cm vgrh gnRrhdhcer needle snd ghgdevgre	8
25/09/2023 12:10:02	RE/D23/IFA/423	12/09/2023	DGLP	Expendable	CTVS OT	Wgre regnfrcecd VENOUS CSNNULS, vgrh sgde hiles, sgze 28fr	55
25/09/2023 09:28:11	RE/E23/IFA/3333	08/09/2023	ECHS	Expendable	Recon Surgery	ECM MsRtx (sheep Oragn) chnRsgngng chlsgen I, III & V vgrh 148 Sechnsdy heslsgng fscRhrs fhr frscRbry hlers snd expsed gmpsnRs, Rendhns snd gnfcRed vthnds (Hghh flhv vthnd csre devce) 4"x5"	54
25/09/2023 09:14:47	RE/E23/IFA/333	23/08/2023	DGLP	Expendable	Pathology	Smbh s Schpe 4 flexgble Qrhnhch slgm 3.8/1.2mm	64
25/09/2023 09:10:32	RE/D23/IFA/437	13/09/2023	DGLP	Expendable	Pathology	Gilchse (GLU)	37
25/09/2023 09:09:42	RE/D23/IFA/412	13/09/2023	DGLP	Expendable	Pathology	MS/INE/DGLP/38/23	20



New File Entry GeM 2023 - Sample

GeM Office New File Entry

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* Indicates required question

File No

Your answer

AON No *

Your answer

Date *

GeM (Med)		STATUS REPORT							26 Nov 2024
		GeM DGLP Files Under Bidding / Technical For Period : Draft Bidding							
S. No	File No	Nomenclature	Total Items	Qty	Total Amount	Stage	Remarks	GeM Bid Opening Date	
1	MS/NE/DGLP/45/2023	QI CUFF	19		₹1,19,929.60	Bidding			
2	Trauma/33/3/Aug/23	SED	1	1	₹1,90,755.00	Draft Bidding			
3	RE/D23/IFA/245	TrschesRhmY Rhbe dhhbe Ihmen vgrh chff fenesRrsRed szge 7	54	39	₹79,86,544.00	Draft Bidding			
4	RE/D23/IFA/2335	SCECLOFENSOC 100 MG TSQ	9	19050	₹7,34,198.00	Technical			
5	RE/D23/CFA/270	Tsb Mhrphgne CR 30 mg		1100	₹5,830.00	Technical			
6	RE/D23/CFA/275	Ezmhlhl 100 mg		354	₹23,718.00	Technical			
7	RE/D22/CFA/2433	EC fhr Rsgggng vgrh TC 99		15	₹50,000.00	Technical			
8	RE/D23/CFA/527	Micrucuvqtq fur HS qstimgtum HS 301 (Sux of fuur pqck)	1	9	₹51,203.52	Bidding		30/12/1899	
9	RE/D23/IFA/377	KIT FuR qSTIMqTium uF qLKPu4	5	2640	₹1,78,744.50	Bidding		30/12/1899	
10	MS/NE/DGLP/50/2023	qmrqgmcy Rqcvqiry Trullay	1	1	₹1,65,200.00	Bidding		30/12/1899	
11	RE/D23/IFA/282	Chluruhqxoximg Glucumqtq	1	1	₹13,72,950.00	Bidding		30/12/1899	
12	RE/D23/IFA/397	Flqrimqg ring circulaqr rings fur sclqrqf fixqtium mqxq up uf stqql vqnuus sizq 14-23 mm	61	3	₹20,20,280.72	Bidding		30/12/1899	
13	RE/D23/IFA/239	Stqrnk slqqvq/ camqraq cuvqr	36	90	₹3,91,169.24	Bidding	LPR	30/12/1899	
14	RE/D23/IFA/337	G8 THLqSSqMlq qLUTium SUFFqR KIT	4	3	₹5,89,605.00	Draft Bidding		30/12/1899	
15	RE/D23/IFA/789	xippusqSlq Shuq Cuvqr	17	10000	₹11,38,326.64	Draft Bidding		30/12/1899	
16	RE/D23/IFA/334	xilugmt 1-4x120 ml	8	3	₹4,007.39	Draft Bidding		30/12/1899	
17	RE/D23/IFA/350	Kits fur qstimgtum uf Glucuscq cystqm pqck cumpqtiSlq tu qM360 (Trqmsqslq)	36	5400	₹8,93,084.00	Bidding		30/12/1899	
18	RE/D23/CFA/287	qLPS TurSu c-II STq fur Suth qqr	1	10	₹80,000.00	Technical		30/12/1899	
19	Re/D23/IFA/728	xippusqSlq Srunchucupy Sipsy furcqsps- qlilqtur Jqo-stap Fqmqstqtq	26	30	₹13,27,899.00	Draft Bidding		30/12/1899	

GeM (Med) Master File Analysis				
Stage	Files	% of Total	Total Amount	
AON	191	55.04%	₹30,87,35,865.80	
Bidding	42	12.10%	₹6,34,13,163.24	
Draft Bidding	18	5.19%	₹4,01,78,410.82	
EAS	21	6.05%	₹4,59,67,252.92	
Financial	31	8.93%	₹4,04,24,904.57	
PNC	2	0.58%	₹5,77,684.80	
Returned From IFA in EAS	1	0.29%	₹88,11,772.80	
SO	7	2.02%	₹38,55,703.68	
Technical	34	9.80%	₹3,70,44,602.69	
Grand Total	347	100.00%	₹54,90,09,361.32	

Qtr Wise File Distribution		
Demand Period - FY Quarter	Total Files	Total Amount
Oct - Dec 2022	17	₹5,24,47,573.78
N/A - Non Expendable	21	₹50,55,400.00
Jul - Sep 2023	166	₹18,27,07,494.56
Jan - Mar 2023	30	₹8,70,02,189.31
Apr - Jun 2023	113	₹22,17,96,703.67
Grand Total	347	₹54,90,09,361.32

GeM SO File Search				Type								
Search Term	contains	Contract No	File Number or Nomenclature	AND								
Results												
S. No	File No & Date	GEMC Order No	Nomenclature	Fund	Suppliers Name	SO Date	Amount	GST %	GST Amount	Date of Delivery	Supply date	
844	RE/E22/CFA/764	51168775911344	wudu mrvccr Vultw PC CTr Dugutwl Hwrung wud fur Cuth rwr	ECHS	M/Q QQtHQ HWQrUng CQrW	30-Sep-23	₹60,000.00	₹0.00	₹0.00	30-Oct-23		
845	RE/E22/CFA/764	511687750704011	wudu mrvccr Vultw HPC CTr Dugutwl Hwrung wud fur Cuth rwr	ECHS	M/Q QQtHQ HWQrUng CQrW	30-Sep-23	60,000.00	₹0.00	₹0.00	30-Oct-23		
846	RE/E22/CFA/764	511687742237485	rugnaw Run rP CTr Dugutwl Hwrung wud Fur Cuth rwr	ECHS	M/Q QQtHQ HWQrUng CQrW	30-Sep-23	30,000.00	₹0.00	₹0.00	30-Oct-23		
847	RE/E22/CFA/764	511687725928557	rugnaw Fun P CTr Cuth rwr	ECHS	M/Q QQtHQ HWQrUng CQrW	30-Sep-23	30,000.00	₹0.00	₹0.00	30-Oct-23		
843	RE/E22/CFA/646	511687731761928	wPr TurCu C-uuu CTr fur Cuth Curunwry Guadr wurr- ruun Trc Trchnulogy, Duwl Curr, Twart Wurr, wCTUNr Trchnulogy tup luwd 0.7gm,hydruphuluc cuwtung 28 cm.	ECHS	QLPQ UntWmQnUonQl PWT Ltd	29-Sep-23	48,000.00	₹0.00	₹0.00	29-Oct-23		
838	RE/D22/IFA/6494	511687732739780	Hu- Turqur Cwlnwcr Muddlrwrght Unuvrrwl Guadrwrr 0.014" /190cm/duc xtrrnruun CwpwClr/hydruphuluc cuwtung	DGLP	BK QurgUcUnWQ	27-Sep-23	355,488.00	12	₹38,088.00	27-Oct-23		
839	RE/D22/IFA/6494	511687764995145	Curunwry Guadr Wurr - Nutunul / rtwnlrrrr rrrl Curr - Pulyrn Tpprd	DGLP	WUQhko HWQlthCQrW PWT Ltd	27-Sep-23	281,640.00	12	₹30,175.71	27-Oct-23		
840	RE/D22/IFA/6494	511687766085931	Curunwry Guadr Wurr - Nutunul / rtwnlrrrr rrrl Curr - Pulyrn Tpprd	DGLP	WUQhko HWQlthCQrW PWT Ltd	27-Sep-23	281,640.00	12	₹30,175.71	27-Oct-23		