

Document Tracking

System

PROJECT PROPOSAL

**UPWARD S OL UT I ONS**

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**Legazpi Heights Subd. Rawis, Legazpi City 4500**

**DOCUMENT TRACKING SYSTEM**

**For LGU – Municipality of Jose Panganiban**

**Project:**

This Proposal is put forward on July , 2024 between:

UPWARD SOLUTIONS located at LEGAZPI CITY and MUNICIPALITY OF JOSE PANGANIBAN located at JOSE PANGANIBAN, CAMARINES NORTE

**Products/Services**

1. **Provision and implementation of a comprehensive Document Tracking System** tailored to the specific needs of Local Government Units in the Philippines.
2. **Comprehensive training for local IT staff and administrative personnel** on the use and maintenance of the system.
3. Ongoing technical support and service maintenance.
4. Information regarding the scope of work can be found in number 11 and Schedule 1 at the end of this Proposal.
5. We recognize the following challenges:

a. Limited existing infrastructure for efficient document tracking and management.

b. High initial setup costs for comprehensive tracking systems.

c. Potential resistance to new technology from LGU employees.

1. The following are ways we can address these challenges:

a. Utilizing a robust, cloud-based Document Tracking System to enhance document tracking, storage, and retrieval processes.

b. Offering flexible financing options to spread the initial setup costs over time.

c. Conducting training programs to demonstrate the benefits of improved document management and streamline the transition process.

**Executive Outline**

1. The Proposing Company, Upward Solutions, is one of the best supplier of the said product/service and in a strong position for growth of the agencies and success. We have extensive experience in implementing large-scale IT projects, a knowledgeable team with expertise in document management technology, and a track record of successful partnerships with various LGUs.
2. The Proposing Company is requesting funding from HON. ARIEL M. NON. Upward Solutions is seeking a mutually beneficial relationship to support both the growth of the agency and success with funding and support from HON. ARIEL M. NON.
3. All information regarding the project is included within this proposal.

**Goals and objectives**

1. **UPWARD Solutions Inc.** is committed to delivering state-of-the-art IT solutions tailored to the specific needs of Local Government Units. Our goal is to enhance document management, streamline operations, and support digital transformation. Objectives are as follows;

* **Streamlined Administration:** To automate routine document tracking tasks, reducing manual workloads and minimizing errors.
* **Enhanced Document Security:** To provide a secure system for managing and tracking documents, ensuring data integrity and confidentiality.
* Improved Accessibility: To enable quick and easy access to documents for authorized personnel, improving efficiency and productivity.
* **Audit and Compliance:** To ensure accurate record-keeping and compliance with regulatory requirements through detailed tracking and reporting.
* **Operational Efficiency:** To facilitate efficient communication and coordination within the LGU by providing real-time document status updates.

1. Scope of Work

a. System Design and Planning

* Assessment: Conduct a comprehensive assessment of current document management processes and future requirements.
* Design: Develop a detailed system design tailored to the specific needs of the LGU.
* Planning: Create a step-by-step implementation plan, including timelines and milestones.

b. Hardware and Software Provisioning

* Hardware: Supply high-quality servers, computers, and other necessary hardware.
* Software: Provide the Document Tracking System, including modules for document storage, tracking, and retrieval.

c. Implementation

* Installation: Perform on-site installation of all hardware and software components.
* Configuration: Configure system settings to optimize performance and ensure compatibility.
* Testing: Conduct thorough testing to ensure the infrastructure meets all performance and security standards.

d. Training and Support

* Training: Offer comprehensive training programs for IT staff and end-users.
* Support: Provide ongoing technical support and maintenance services.

1. Key Features

* **Document Storage and Retrieval:** Centralized storage system for easy document access and retrieval.
* **Tracking and Monitoring:** Real-time tracking of document status, location, and movement within the organization.
* **Automated Alerts and Notifications:** Automated alerts for pending actions, deadlines, and document status updates.
* **Security:** Robust security features to protect sensitive documents and ensure data integrity.
* **Integration:** Seamless integration with existing systems such as HRMS, financial systems, and other administrative tools.
* **Audit Trails:** Comprehensive audit trails to track document history and ensure compliance with regulatory standards.

1. Benefits

* **Efficiency:** Streamlined document tracking processes reduce paperwork and manual tasks.
* **Transparency:** Improved tracking and reporting increase transparency and accountability.
* **Data Security:** Enhanced security measures protect sensitive documents and ensure data integrity.
* Accessibility: Improved access to documents for authorized personnel enhances productivity.
* Cost Savings: Reduced operational costs through efficient document management.

**Marketing**

1. The products and/or services will be marketed as follows:

* Direct engagement with LGU officials to highlight the benefits of improved document tracking and management.
* Demonstration programs to showcase the positive impact of reliable document management on administrative efficiency.

**Financial Proposal**

1. See below a comprehensive framework of the proposed pricing, schedule of payment, and our offered payment terms.
2. **Pricing**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Qty | Unit | Item Description | Amount | Total Amount |
| 1 | set | Document Tracking System |  |  |
| Total | | |  |  |

1. **Schedule of Payment**
   * Initial Payment:
     1. 70% of the Project Cost upon signing the contract.
   * Final Payment:
     1. 30% of the Project Cost upon completion of installation and initial testing and final acceptance of the project.
2. **Payment Terms**

* Payment Methods: We accept payments via bank transfer, credit card, or cheque.
* Invoices: Invoices will be issued 15 days prior to the due date.
* Late Payments: Late payments will incur a fee of 1.5% per month.

**Terms and Conditions**

1. This Project Proposal defines the terms and conditions of the Agreement between Upward Solutions and LGU - Municipality of Jose Panganiban.
2. Both parties agree to be bound by the terms highlighted in the Business Proposal.

**Schedule 1- Scope of work**

|  |  |  |
| --- | --- | --- |
| **Description of Services/product** | **Deliverable(s)** | **Timeline of project** |
| Provision of Document Tracking System | Document Tracking System | 1 week |
| Training for local IT staff | Training sessions and manuals | 1-3 days |
| Ongoing technical support | Regular maintenance and support services | all year round |

**IN WITNESS WHEREOF**, the Parties have executed this Agreement as of the date stated above.

**SIGNATURES**

|  |  |
| --- | --- |
| **Upward Solutions** | **LGU - Municipality of Jose Panganiban** |
| **KENNETH L. CANTELA** |  |
| **Printed name over signature** | **Printed name over signature** |
| **designation** | **designation** |



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