ORIENTAL INTEGRATED

**Features.**

1. Login/ Signup:
   1. Login and Signup separate pages with option of forgot password.
   2. Login page will be universal for all users be it master, accountant etc.
   3. With forgot password users can create a new password.

TAT – 3-4 days

1. Add/ Edit / Delete Forms:
   1. Can create new billing forms with given fields and can submit form to save it in the database.
   2. Can Edit the form if required. Only users who have privileges to edit can edit the forms.
   3. Users can delete a form if required.

TAT – 1 WEEK

1. Invoice Generation.
   1. Can create invoices with desired Fields/ Data. Invoices can have number of data fields E.g., Invoice ID, Invoice Date, Billing ID, Transaction Amount etc.
   2. Invoice can be generated on required pages. E.g., Invoices can be created while submitting billing form or while adding billing details in the system etc.
   3. Invoice generation after every transaction related to payment.

TAT – 1 WEEK

1. PDF Generation.
   1. PDF generation on required pages. E.g.,After Filling a Bidding form we can generate a minify pdf and save it on system so that we can have a printout when needed.

TAT – 1WEEK

1. Email & Notification Alert.
   1. Alert to Master about newly added billing form filled by other users on the dashboard.
   2. Also, Email will be sent to user that a new billing form is been submitted.
   3. Same can be sent to Zone Wise Manager or Surveyor can get details in his dashboard etc.

TAT – 2 WEEKS

1. SMS Features.
   1. Remainder Notification Alert will be sent to user about form filling so that the user can fill physical form and submit to the site for bidding process.
   2. SMS alert can also be sent to Master regarding different stages of the bidding process.

TAT – 2 WEEKS

1. Reports Generation.
   1. Reports can be generated through master dashboard which will contain data like number of biddings filled, number of surveys by surveyor, total number of biddingssubmitted to gov site, total number of accepted biddings, total amount of successful biddings etc.
   2. Reports can be generated daily, weekly, monthly, yearly or with custom dates.
   3. PDF Reports can be generated in the dashboard and can be downloaded.

TAT – 1 WEEK

1. Creating / Deleting Users.
   1. Master will have the rights to create / Delete users.
   2. Master can set the hierarchy according to need.

TAT – 2-3 DAYS

1. User Restrictions/ Privileges.
   1. Masters while creating users can set the desired privileges to users. E.g., a user created by Master can fill the bidding details form but cannot edit it or a user can edit the bidding form but can’t see the transaction amount of the bidding form etc.
   2. Role based access ensures setting permissions and privileges to enable access to authorized users.

TAT – 1 WEEK

1. Data Archiving.
   1. Data archivingis the practice of identifying data that is no longer active and moving it out of production systems into long-term storage systems*.*
   2. Archiving Data helps to reduce inactive data which is not required. It helps removing it from front end and storing it such that after a given period, it automatically gets deleted.
   3. Archival of data can be done through master dashboard.

TAT – 1 WEEK

1. Dashboard.
   1. Dashboard is a user interface or web page that gives a current summary, usually in graphic, easy-to-read form, of key information relating to progress and performance, especially of a business or website.
   2. We have different dashboard for different user level.
   3. E.g., Master will have different functionalities through which he can have all the process information in his system. Master can see who and when filled the bidding form, can create/ edit/ delete users. Check total storage used. Number of active users who are currently working in the system etc.
   4. With different roles in the process dashboard functionalities will be set accordingly.
   5. When a user is logged in, he is redirected to dashboard, from where he can do his tasks

TAT – 6 WEEKS

1. Import Bid/ Tender.
   1. Function to import csv file which contains bidding details in the system.
   2. Csv files can contain large numbers of data which can be imported all at once.

TAT – 1 WEEK

1. Tender Segregation / Filtration.
   1. Adding a Function which will help to filter out all the bidding forms.
   2. We can apply filter and get the status of the bid/tender.

TAT – 3,4 DAYS

1. Tender Assignment.
   1. Assign tender to zone wise manager, category wise or to another manager (role given to a user).
   2. Assigning tender to user/ role and making a hierarchy which will help smooth the bidding process.

TAT – 1 WEEK

1. Site Visit proposal notification.
   1. When bidding form is verified by a user, a notification will be sent to surveyor with start date and end date of the task.
   2. Surveyor then can add details of the visit to his system.

TAT – 1 WEEK

1. Upload Data by Surveyor.
   1. After site visit Surveyor can upload images of site, Cost estimation etc in the system.
   2. These details will be sent to the system as notification.

TAT – 1 WEEK

1. Proposal preparation
   1. After final submission by surveyor. Proposal preparation starts.
   2. A form with auto populated fields with auto calculated values will be shown and after verifying the form a PDF will be generated with a Document unique ID.

TAT – 1 WEEK

1. Bidding Status Notification.
   1. A bidding notification with current status will be sent to user.
   2. If the bidding status is rejected, notification will be sent with the status Rejected.
   3. If the status is approved then the next step of bidding process will be automatically preceded.

TAT – 2,3 DAYS

1. Processing Tender.
   1. After approval of tender all the required forms and bank guarantee form will be filled.
   2. Documents like Aadhar-Card, Pan-Card, Photo, Bank cheque will be asked from People/ Labor and documents will be uploaded in the System which will generate a PDF Offer Letter with a unique ID which will be given to labors.

TAT – 4,5 DAYS

1. Stamping & Signature in the PDF.
   1. All the generated PDF will be digitally signed with Stamp.

TAT – 1,2 DAYS

1. High Priority Bid.
   1. Priority of the Bid/ Tender will depend on the Value of the Bid.
   2. Higher the Bidding Value higher will be the Priority.
   3. Bids will be processed by ascending order with the bidding amount.

TAT – 1,2 DAYS

1. Attaching Documents.
   1. With each steps in the Bidding Process the system collects and maintains documents with high priority and safety.
   2. Each Document will receive a unique ID which will help to determine the priority and role/level of user associated with it.

TAT – 2,3 DAYS

Logo, company name

Description automatically generated

**Request for Proposal forImplementation of Oriental Integrated**

# ProposedSystem

## ImplementationMethodology

The methodology to be used by the bidder to implement the ERP solution will have different workelements and activities. All these activities and work elements should coherently focus onachievingthefollowing key results.

1. Qualityofthesolutiondeployed
2. Usersatisfactionwhiledeployingandusage
3. Successful implementation in terms of completeness and timely accomplishmentofthe outcome

Whiletherearedifferenttechniquesandtoolsavailableasapartofthemethodology,followingsare expectedtobe partoftheimplementationmethodology tobeadoptedbythebidder.

* + - Workshops with different stakeholders for capturing detailed functional requirements,creating awareness of best practices, communicating the changes, building consensuson process (aka workflow) design, for signing off the deliverables, etc. These need to beorganized at different intervals and in different places throughout the duration of theprojectasdemanded bythe context.
    - Stakeholder consultations other than workshops, with those stakeholders who will beidentifiedbyIITH,forthepurposeofcriticalinputs,review,suggestions,processdescription,etc.
    - Review sessions with different stakeholders for signing off the deliverables, walkingthroughthedeliverablesforfacilitating quickunderstanding,etc.
    - Internal review mechanisms of bidder for ensuring the quality of the solution and thedeliverables.
    - AnintegratedbugtrackingmodulefortheenduserstosubmitanybugsfoundwhileusingtheERP system
    - Adoptionofthereviewcomments-effectivemechanismstoadoptthechangessuggestedandfixthebugsreported.
    - Documentation of proceedings – recording the developments, discussions, deliverables,usingstandardmethodology and nativetoolsavailablewith theERPsolution.
    - Workstandards/practicesfor documentation,configuration,testing,datamigration,etc.
    - TrainingdifferentstakeholdersonacontinuousbasisandprovidingHelpmanualsfortheend users

# Scope ofWork

Following are the key technical and functional requirements for the proposed system

## GeneralScope

Following are the general features required in the proposed web based end-to-end solution. Web-basedERPapplication shouldbehostedat cloud server

* + - Secureweb-basedaccess usinghttps
    - Capabilityforcontinuousimprovementandupgradation
    - Configurabilitythroughweb-interfaceandclientinterface
    - Provisionfordecisionsupportmechanism
    - Facilitatepaperlessworking
    - Scalable Design
    - Email Integration
    - SMS Integration
    - Notification Integration
    - PDF Generation
    - Invoice Generation & Related Calculations at Back end
    - Workflowbased processapprovalandarchivalmechanism
    - Comprehensivedataandapplicationsecurityfeatures
    - Adequate securityprovisions forpreventingtampering ofthesoftwareaswell asdata
    - Archivalofinformationand data
    - Audit logsofuser sessions
    - Provision todefineand viewrulesfor users
    - Provisionforrole-basedaccessrights
    - Provisionofinteractivevalidationsofdataentries
    - Provisionfordataitem-basedaccessrights
    - Provisionforreportsgenerationasperrequirements

## ProjectDeliverables

TheIAshallsubmitascheduleforthebelowmentionedmilestonesanddeliverables(butnotlimitedto)thatwouldbedeliveredduringtheprojectplan.TheIAshallbebound with the proposed and finalized (after discussion with IITH) project plan and timelines forsubmissionofdeliverables.

* + - The table gives a set of high-level activities and corresponding deliverables which willbein projectscope.
    - TheIAshouldusethislistonlyasaguidelineintermsofexpecteddeliverables.TheIAis required to furnish detailed information regarding each deliverable of every step ofactivitiesproposed duringand afterthe implementationoftheproject

Followingarethelistofkeyactivitiesanddeliverables(butnotlimitedto)fortheprojectphasesasapartofERP implementation atIITHbytheImplementingAgency.

|  |  |
| --- | --- |
| **Activities** | **Deliverables** |
| **1. ProjectPreparation** | * ProjectCharter * Project PlanandTeam |
| **2.DetailedDesign**/  **Blueprint** | * DetailedArchitectureofERP system * DetailedProjectPlanforBlueprint * As-Isreport * To-Bereport * GAPassessmentreport * Change management workshop for newprocesses * Detaileddesigndocumentof ERPsystem |
| **3.Configuration /Customization** /**Development of Core andOtherModulesasperRFP** | * Configuration documents for all processes andmodules * Customization-design,developmentandtechnicaldocuments * RolesandAuthorizationMatrix |
| **4. CRP Demos and TestingofERPmodules** | * Conference Room Pilot (CRP) Demos of Coreandothermodules * Testing Strategy document -Testing Plan, Testdataandresults * Loadtestingreport * Systemacceptancetestingreport * Baselinetestingreport * Developmenttestingreport * Integrationtestingreport * Beta testingattheinstitute levelanditsreport * IssueLogsforalltestingdone |
| **5. DataMigration&Integration with legacysystems** | * Datacollectiontemplates * Datamigrationstrategyreport * Datamigrationtoolsandconversions * Datamigrationandsanity check * Integration of legacy systems with the ERPsystem |
| **6.Training** | * TrainingPlanwithschedulesandcontent * User Plan * DeliveryofUser Trainingasperthematrix |
| **7. Go-live of Stable versionof ERP system** | * User acceptance test (UAT) at the end of betatesting and commissioning of stable version of-liveat the institutelevel |
| **8.PostGo-livewarranty**  **support** | * Go-livewarrantysupporttilltheendof 3rdyear |
| **9. Functional Requirements** | * ModularDesign * Authentication,AuthorizationandAccessControl * BackupandDisasterrecovery * Front endDesign * SystemAdministrationandMaintenance * CentralizedDatabasefortheSystem * Rolebasedauthentication * Datamigrationfromlegacysystems * Base Line Testing * Development Testing * Integration and System Testing * Load and Stress Testing * Initial Product Training * Core Functional User Training * End User Training * Technical Training |

# Diagram Description automatically generated~End of Document~