Instituto Superior Técnico

DM4iRetail – 1ª Entrega – 2 de Outubro de 2015

Turno: 5ª 17h30 – Prof. Alberto Silva

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Description of the project

What?

From the developer's side, our corporation, this project is to develop a new information system for the company iRetail, available to every worker in it, made of the following modules:

- Document management and workflow;
- Invoices approval;
- Purchasing management

The project will also include the preparation of the current resource plan and workers, and testing the system:

- Integration with the existing resource planning;
- Training of K-users and IT engineers;
- A pilot test of the system.

Why?

For the client company, iRetail, the purpose is to overcome the limitations of paper documents and their flow and thus:

- Improve the quality of the information;
- Increase the satisfaction of the employees;
- Optimize the purchasing processes;
- Increase the level of the clients' satisfaction;
- Reduce the paper flows;
- Reduce the administrative costs.

Success Factors

- Goals shall be clearly defined to avoid wrong or unneeded operations;
- All the needed requirements should be clearly defined;
- Workers should be willing to use a much different system, from paper to a computer system;
- The documentation and manuals must be accurate and complete to be useful;
- The training should be sufficient to make users and technicians able to work;
- Roles and responsibilities must be clearly defined;
- There should be a common language between the team;
- The pilot test should cover most or all the operations the system offers.
- The acceptance tests should be enough to find errors;
- The system should be designed to allow for all the required functionality.

Success Criteria

- Time
  - o The project plan shall be approved until November 20th;
  - o The Pilot must not last more than one month;
  - o The system should be operational five months after the approval of the project plan, with less than two weeks tolerance;
  - o The external supplier shall offer a minimum warranty period of three months;
- Cost
  - o Do not exceed the € 400 000 budget for the whole project (excluding network structures and hardware) ;
  - o The accepted budget variance shall be less than 6%;
- Quality
  - o The number of non-conformities during acceptance tests should not be greater than 10%;
  - o The time for correction of conformities should be less than 48 hours;
  - o The evaluation of the training sessions shouldn't score lower than 3.75, from 0 to 5.

Expected Benefits

After one year:

- Reduction by 50% of employees' complaints, considering the expected overall employees satisfaction, ensuring the reimbursement of expenses no later than 5 working days after submission;
- Ensure supplier's invoices get approved less than 10 working days after reception;
- Based on the previous benefit, allow iRetail to negotiate better discounts from suppliers;
- Allow classification and search of documents, based on content attributes;
- Reduce paper costs and physical space for archiving paper by 50%;
- Reduce administrative and post costs by 20%.

Work Breakdown Structure
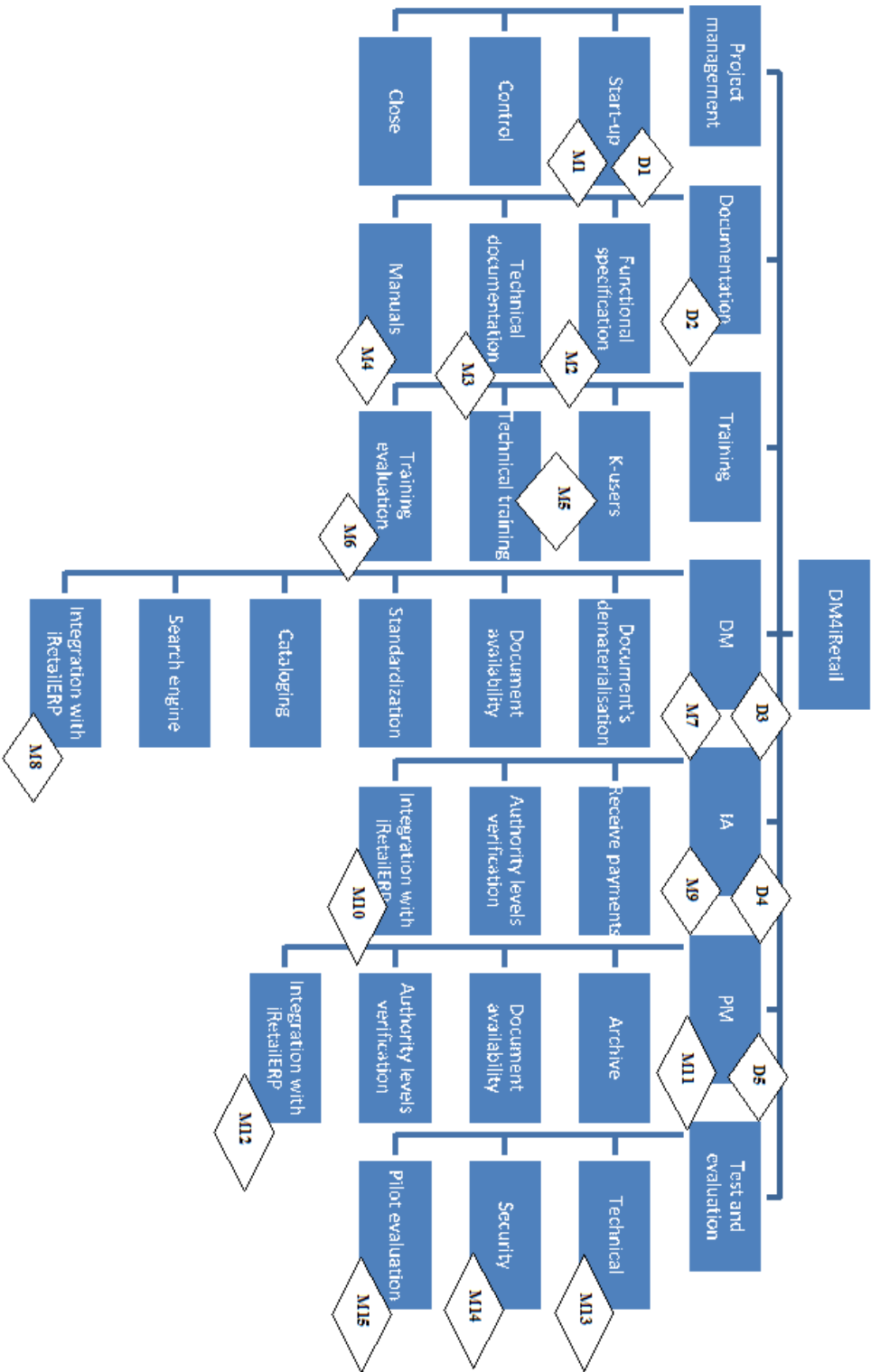
Work Package Description

Main Package	ID	Subpackage	Description	ID	Milestones	ID	Deliverable
Project Management	1.1.	Start-up	The requirements document The plan of the project development Appointing the project manager and team	M1	Approve the team and the plan by 20th November	D1	Plan
	1.2.	Control	Make sure milestones and deliverables are successful	___	_____	___	
	1.3.	Close	The warranty offered by the supplier	___	_____	___	
Documentation	2.1.	Functional Specification	The document with the functionalities developed	M2	Complete the specification of all the functionalities	D2	Documentation
	2.2.	Technical Documentation	The documentation of all the modules	M3	Document the whole system		
	2.3.	Manuals	The manuals for using the system	M4	Complete the manuals		
Training	3.1.	K-Users	Training K-users in Lisbon and Oporto	M5	Finish the training	___	_____
	3.2.	Technical Training	Training technical engineers in Lisbon			___	
	3.3.	Training Evaluation	Evaluation of the training sessions	M6	Finish the evaluation	___	

Document Management	4.1.	Document's Dematerialisation	Transform paper into electronic documents	M7	Complete the functionality	D3	Document Management
	4.2.	Document Availability	Make documents available, classified according to criteria				
	4.3.	Standardization	Standardising documents based on classifications and standards				
	4.4.	Cataloging	Catalog and index documents based on classifications				
	4.5.	Search Engine	Make a search engine				
	4.6.	Integration with iRetail	Integrate with iRetail	M8	Complete the integration		
Invoices Approval Module	5.1.	Receive Payments	Receive payment information	M9	Complete the functionality	D4	Invoices Approval Module
	5.1.	Authority Levels Verification	Verifying copies of invoices for approval				
	5.2.	Integration with iRetail	Integrate with iRetail	M10	Complete the integration		
Purchase Module	6.1.	Archive	Archiving purchase documents	M11	Complete the functionality	D5	Purchase Module
	6.2.	Document Availability	Making documents available based on iRetail rules				
	6.3.	Authority Levels Verification	Verify authority levels to approve an order				
	6.4.	Integration with iRetail	Integrate with iRetail	M12	Complete the integration		

Test and Evaluation	7.1.	Technical	Acceptance tests	M13	All the tests are accepted	___	
	7.1.	Security	Security features implemented to follow regulations	M14	The required security is verified	___	_____
	7.2.	Pilot Evaluation	Pilot test to evaluate the system operability	M15	The behavior of the system is accepted	___	