Instituto Superior Técnico

DM4iRetail – 1ª Entrega – 2 de Outubro de 2015

Turno: 5ª 17h30

Group:

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Description of the project

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.

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 suppliers' 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.
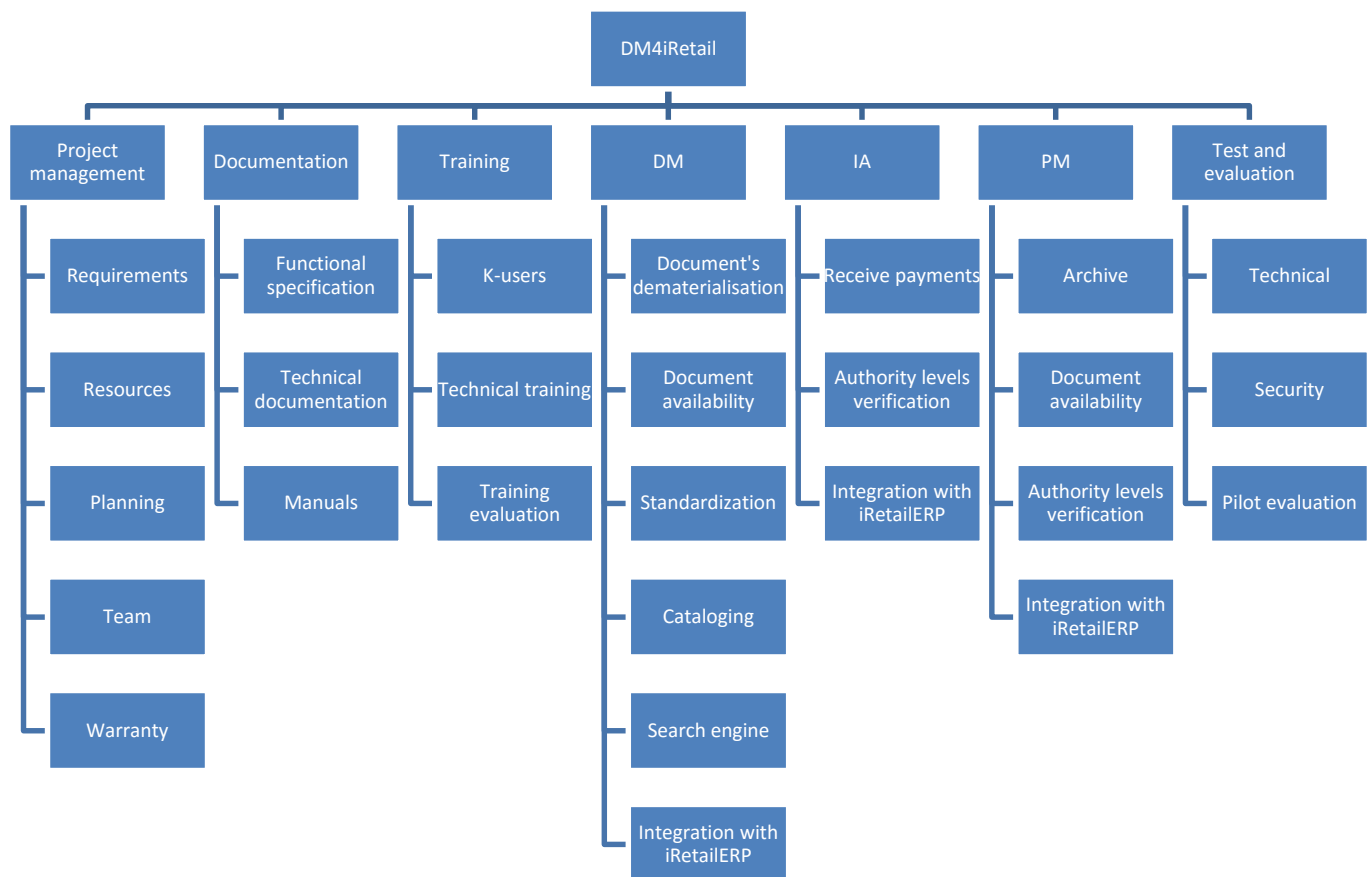
Success Criteria

- 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

- 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	Subpackage Name	Description	Milestones	Deliverable
Project Management	Requirements	The requirements document	Complete the document	_____
	Resources	The needed resources, such as the existent software	Acquire all the needed software	
	Planning	The plan of the project development	Approve the plan by 20th November	
	Team	Appointing the project manager and team	Appoint the full team	
	Warranty	The warranty offered by the supplier	_____	
Documentation	Functional Specification	The document with the functionalities developed	Complete the specification of all the functionalities	Documentation
	Technical Documentation	The documentation of all the modules	Document the whole system	
	Manuals	The manuals for using the system	Complete the manuals	
Training	K-Users	Training K-users in Lisbon and Oporto	Finish the training	_____
	Technical Training	Training technical engineers in Lisbon	Finish the training	
	Training Evaluation	Evaluation of the training sessions	Finish the evaluation	
Document Management	Document's Dematerialisation	Transform paper into electronic documents	Complete the functionality	Document Management
	Document Availability	Make documents available, classified according to criteria		
	Standardization	Standardising documents based on classifications and standards		
	Cataloging	Catalog and index documents based on classifications		
	Search Engine	Make a search engine		
	Integration with iRetail	Integrate with iRetail	Complete the integration	
Invoices Approval Module	Receive Payments	Receive payment information	Complete the functionality	Invoices Approval Module
	Authority Levels Verification	Verifying copies of invoices for approval		
	Integration with iRetail	Integrate with iRetail	Complete the integration	

Purchase Module	Archive	Archiving purchase documents	Complete the functionality	Purchase Module
	Document Availability	Making documents available based on iRetail rules		
	Authority Levels Verification	Verify authority levels to approve an order		
	Integration with iRetail	Integrate with iRetail	Complete the integration	
Test and Evaluation	Technical	Acceptance tests	All the tests are accepted	_____
	Security	Security features implemented to follow regulations	The required security is verified	
	Pilot Evaluation	Pilot test to evaluate the system operability	The behavior of the system is accepted	