



*i-Trust Informatics Pvt. Ltd*

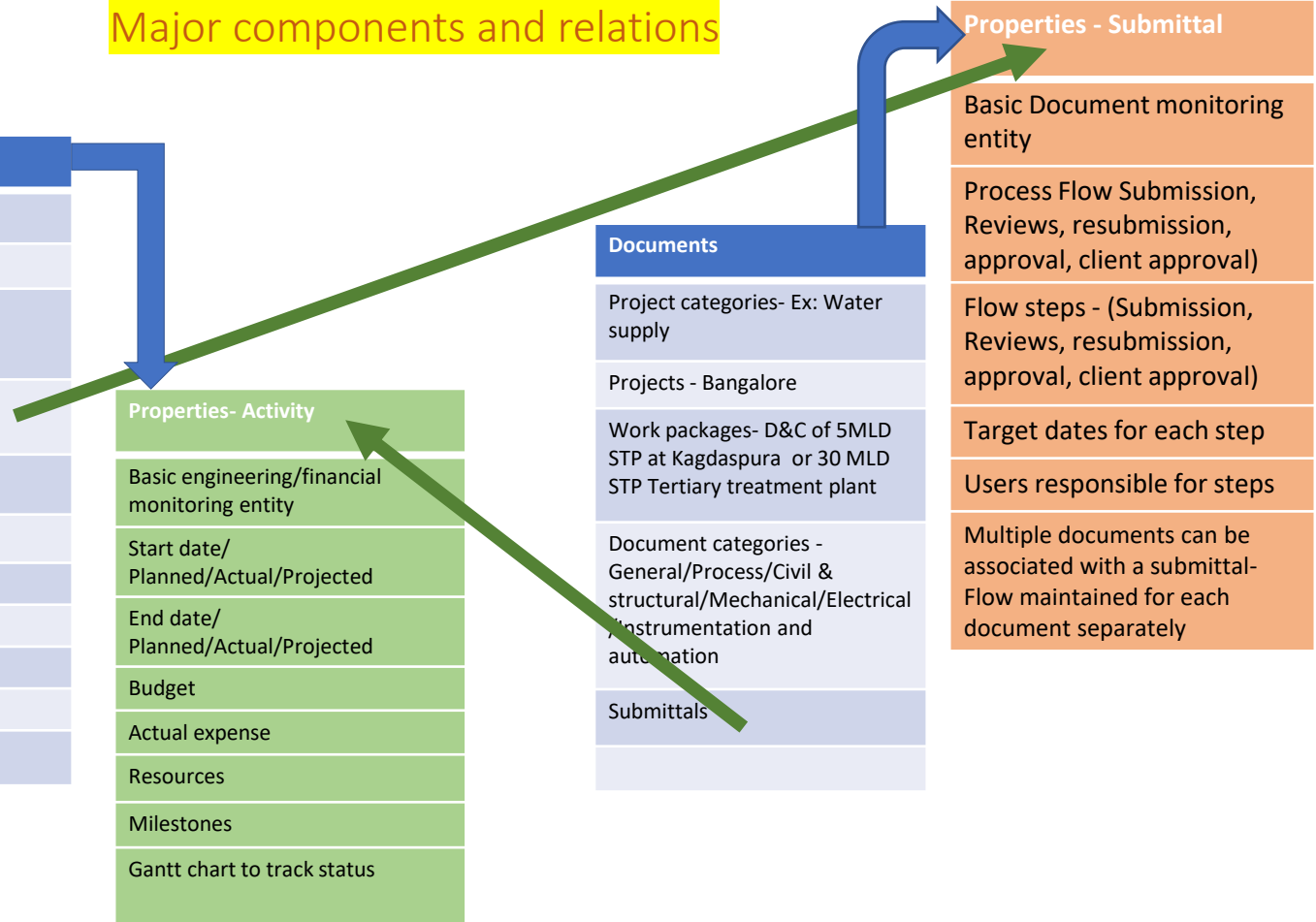
## Major components and relations

Activities
Region ---bangalore/Jharkhand
Project category---water supply/STP
Project name
Work packages (optional)
Option --a /option
Sub activity –
Sub activity – Level-2
Sub activity – Level-2
.....
.....

Properties- Activity
Basic engineering/financial monitoring entity
Start date/ Planned/Actual/Projected
End date/ Planned/Actual/Projected
Budget
Actual expense
Resources
Milestones
Gantt chart to track status

Documents
Project categories- Ex: Water supply
Projects - Bangalore
Work packages- D&C of 5MLD STP at Kagdaspura or 30 MLD STP Tertiary treatment plant
Document categories - General/Process/Civil & structural/Mechanical/Electrical /Instrumentation and automation
Submittals

Properties - Submittal
Basic Document monitoring entity
Process Flow Submission, Reviews, resubmission, approval, client approval)
Flow steps - (Submission, Reviews, resubmission, approval, client approval)
Target dates for each step
Users responsible for steps
Multiple documents can be associated with a submittal- Flow maintained for each document separately



Engineering
Region
Project category
Project name
Work package Name
Activity
Sub-Activity
Sub-Activity- Level 2
Sub-Activity- Level 3
.....

Properties (Activity/sub-activity)
1. Basic engineering/Financial monitoring entity
2. Start Date/ Actual Start date/ Projected start date
3. End Date/ Actual end date/ Projected end date
4. Budget
5. Actual Expense
6. Resources
7 Milestones

# Work package - Details



1. Contractor : Name of the contractor --From a master list of contractors.
2. Work Package name: Name assigned to the contract )
3. Location , client : From master.
4. Budget: Budget (this drop down allows you to choose currency (INR/USD/YEN)
5. Actual expenditure: Actual expenditure incurred so far
6. Start date, Actual start date, Projected start date
7. End date, Actual end date, Projected end date

More relevant, if work is in progress and there is a change in completion date foreseen.  
Otherwise enter the same value as Planned end date,

1. Assign user: This option is to assign an administrative user to a work package who has all rights to configure work package. There can be multiple users assigned to same work package. Only after the admin enters the details, if a user signs in, he will see work package.
2. Status: Current status of work package (not started, in progress, complete)

# Tasks - Details



Tasks are different project activities which need to be monitored. Following information is stored about tasks

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**Task name:** Name assigned to the task

**Discipline:** Choose from available list.

**Actual Start date:**

**Planned end date:** As per submitted plan.

**Projected start date:** (relevant if project has not started on planned date)

**Owner:** Choose from drop down list the user who has ownership rights on activity.

**Description:** Brief description of activity

**Currency:** Choose currency (INR/USD/YEN) for budget.

**Budget:** Budget (in chosen currency- INR/USD/YEN)

**GST :** in Percentage.

**Actual expenditure:** Actual expenditure incurred so far



# Engineering – Resources and Milestones



Resources for different tasks which need to be monitored can be associated with a task. Following information is stored about resources for a task.

- a. The resource name is selection from master resource list.(The master can be updated by site administrator which is explained separately).
- b. Cost type (choose appropriate cost type).
- c. Total cost: Enter total cost of resource of this type that is allocated to the task.
- d. Allocated units: enter number of units of resource allocated to the task.

Milestones are some important events that can be identified and monitored Ex: Clearance from statutory bodies. There is a thin line between milestones and tasks. Milestone has no resources associated with it. Milestones for different tasks which needs to be monitored can be associated with a task. Following information is stored about resources for a task.

- a. Name of the milestone,
- b. Status (Completed/Pending)
- c. Planned date
- d. Projected date (initial planned date is same as projected date)

Authorized users can update status of the tasks/sub-tasks/resources and milestones.

- a. Tasks/sub-tasks----Percentage of task completed or completed if task is completed.
- a. Measurement ----Can upload progress like volume of excavation/sq. feet of slab etc..
- b. Resource usage---Can update the usage any regular intervals

Authorized users can view status of all activities through tree view and selection of activities.

- a. Status
- b. Resource usage
- c. Milestone completion status
- d. Measurement book



## Summary of functionality.

1. The documents are classified as various “Submittals” The submittals can be associated with any task/subtask or can be under the “work package”.
  2. Each submittal belongs to a category (of submittals). The different categories are General, Process, Civil/Structural drawings, Technical data sheets, general drawings-planning drawings, electrical drawings, instrument drawings etc....
  3. Each submittal can follow a flow (submit/ review/approve etc..). The flow defines steps , sequencing of steps and target sates for completion of these steps.
  4. There will be target dates assigned to each step of the flow and for each step users are assigned who are responsible for that step in the flow.
  5. The documents in “submittal” are submitted with covering letter and they are assigned a reference number. Typically each “submittal” will be a folder and documents under it.
- Any revised submittal will have the same folder structure and all documents in the same.

# *Document Management - Submittal*



## Basic Document monitoring entity

Process Flow ---- Submission, Reviews, resubmission, approval, client approval

Target dates for each step

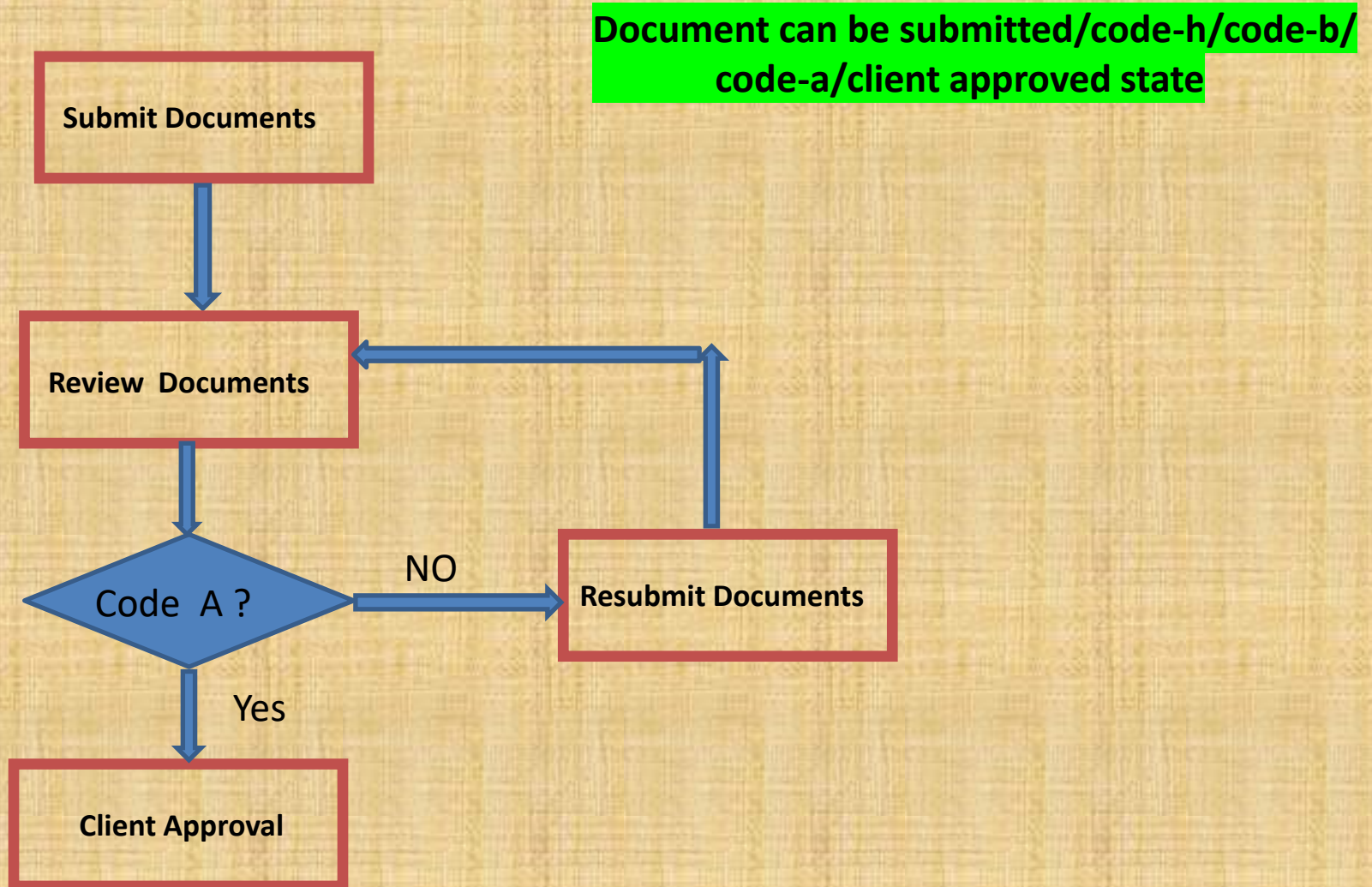
Users responsible for steps

Files and Folders

Multiple documents can be associated with a submittal- Flow maintained for each document separately

Submittals, Documents under the submittal are represented as a tree.

# Document management – Flow steps



# *Document management – Upload files-1*



The Document management allows smooth transition from manual system to online. The documents are submitted with a covering letter. Provision has been made to add details of the covering letter and upload the scanned copy of the covering letter.

- a. Subject/Description: Any description for the submittal that would help describe it.
- b. Reference number: This is system generated reference number to identify the submission for NJSE documents. For Contractor and BWSSB options, this field is entered based on the letter received.
- c. Document media: Select the media on which the document was submitted.
- d. File reference number: This is the reference number used in current system where the correspondence is filed.
- e. Remarks: Any additional noting while uploading.
- f. Document type: Choose if the document is a cover letter or a general document.  
If “cover letter” option is chosen, following fields are to be filled up.



# *Document management – Upload files-2*



- a. Originator: Source of the document (Contractor/BWSSB/NJSE)
- b. Originator reference number: The reference number in the cover letter received.
- c. Incoming receive date: date on which the cover letter and documents were received.
- d. Cover letter date: date the cover letter is dated.
- e. Choose file (cover letter): file that has scanned copy of cover letter.
- f. File or folder: There can be a single document or multiple documents in a folder.
- g. User can Browse the local system and select the file or folder to be uploaded.
- h. Click “Submit” to submit the document.

If “General Documents” option is chosen, following fields are to be filled up.

- i. Choose File or Folder.

# *Document management – Upload Status*



Authorized users can upload document status based on the flow process.

- a. The “status” shows a drop down of possible states you can move the documents (based on the flow process) and user.
- b. Choose a status.
- c. Add a reference number .
- d. Enter date of cover letter.
- e. Choose actual date (this can be Submit/ Code-h/ Code-b/ Code-a/Client approved)  
Code-A/Client approved document can not be submitted again.
- a. Browse and select scanned copy of cover letter.
- b. Browse and select “review file” (the file that contains review feedback, if any).
- c. Enter additional comments.

Allows project issues /hindrance to be reported/monitored. Alarms can be raised to users based on issues.

- a. Can be associated with an activity
- b. Will have description,
- c. Assigned user : A user is assigned to handle the issue.
- d. Assigned date: date on which issue was assigned to a user.
- e. Reporting user : User reported the issue.
- f. Reporting date: Date of reporting.
- g. Approving user : User who is authorized to close the issue.
- h. Approving date: Date of reporting.
- i. Proposed date of closure.
- j. Current status (when entered this should be "Open").
- k. Remarks (if any) .

Allows integration of reviews/minutes with project management.

- a. A User can be assigned as a coordinator of the meeting.
- b. Review type (one time or periodic can be fixed)
- c. Choose user names who will be attendees.
- d. Add any desired description.
- e. The co-Ordinator can update the minutes of the meeting and upload files if desired.



# *Masters – Exercises 1*



For a work package with option c.

1. Add a milestone
2. Add a resource to a task
3. Update a progress activity progress.
4. Update resource usage.

## Exercises - 2



1. Add a submittal to any activity with flow2
2. Add document (folder).
3. Update status of document (code-b review). Add review document.
4. Resubmit the document (alter the original document as per review document).
5. Update status to code-a.
6. Approve the document.
7. View status.
8. View document history.
9. View dashboard to see if this has been reflected.
10. Delete a submittal

## Exercises - 3



1. Add an issue.
2. Update status of the issue.
3. Check in “issues” menu for work package if that is reflected.
4. Add a review meeting.
5. Update review meeting proceedings.
6. View and check updated proceedings.

Accessible from dashboard of authorized users.

- a. Field camera with a static IP address can be configured to get image onto dash board..
- b. Camera can be assigned to a work package.
- c. Access can be granted to users.



## **1. Create Project category---Super admin (installation).**

- a. Project Category ,
- b. Description

## **2. Create Projects (Add projects)**

Select Project category,

- a. Add project name,
- b. Add Project code,
- c. Add Funding Agency,
- d. Add start date,
- e. Select Currency (INR/USD/YEN)
- f. Add Budget
- g. Add Actual expenditure (if project has already started)
- h. Add Planned end date,
- i. Add Projected end date.

## 1. Add Contractor

- a. Name
- b. Type of contract----Rate contract etc..
- c. Contractor representative,
- d. Contract value,
- e. Contract duration,
- f. NJSE Project Number, (Critical and unique) -----Got from corporate office
- g. Project Specific Reference Number (Critical and unique) ----Got from corporate office
- h. Agreement date,
- i. Start date,
- j. Letter of acceptance date,
- k. Proposed Completion date.

# *Masters – Work package*



## **1. Add Work Package \_ This is basic entity that is monitored.**

1. Choose the project of interest.
2. Enter work package name,
3. Enter Work package code.

## **2. Add Client names**

- a. Choose the project,
- b. Enter client,
- c. Enter client code

## **3. Add Locations**

- a. Choose the project,
- b. Enter location,
- c. Enter location code

**Resources:** These are material and human resources to be used in the work package.

**The resource information is added here and allocated to various activities.**

1. Resource name : Name,
2. Unit of Measurement: Units used to allocate resource like Tonne for steel, Hors for consultants' time, Days for unskilled man power etc...
3. Cost Type: Cost/unit of measurement or hundreds etc...
4. Basic cost: Cost for the resource per unit of cost type.
5. GST: GST rate applicable (if any)
6. Total budget: Computed value will be filled in this.
7. Description: Any free text description of the resource.



Accessible from project administrators.

- a. Following data about user is captured.
  - a. Name, Address, Mobile number, email id, login name, password, profile picture.
- a. User type is assigned at the time of creation (admin user, project admin, submitter, reviewer, client)
- b. Project is assigned to a user by project administrator.

# *Masters – Exercises 4*



1. Create a project.
2. Create a contractor.
3. Create a location.
4. Add resource ----skilled man power
5. Create a work package with option-c
5. Add user “site engineer”.
6. Assign the created project.
7. View work packages->engineering

# Questions-



For questions involving writing steps to view the document, start from landing page and show options to be clicked.

Ex: Write steps to view a submittal.

Choose Document ->activity->submittal name

- a. Explain the terms project category, project, work package and activity, sub-activity.
- b. What is milestone? Give one example.
- c. Write steps to update a resource usage in a task/sub-task.
- d. Write steps to update status of a task?
- e. Can we connect field camera to the software? How we choose a camera?
- f. What is the term contractor, location, client mean in the current application.
- g. What is a work flow for a submittal. Name four steps in sample work flow.
- h. Can two documents in a submittal have different workflows?
- i. When is a new version of a document created?
- j. What is difference between download and view of a document?

# Questions-



- k. Write steps to create a submittal and upload documents?
- l. What is a cover letter? Can multiple documents have same cover letter?
- m. What is a review document? Write steps to view it.
- n. Write steps to view current state of a document.
- o. Write steps to update a review meeting proceedings..
- p. Can we view pending issues?
- q. Write steps to update an already created issue...
- r. Where do find help files?