Team University of B **ictoria**

University Management Software (UMS)

Request for Proposal

Version 1.0

Document History

Version	When	Who	What
1.0	2023-01-19	All	Initial Drafting

Table Contents

1.0 Project Overview

The University of Victoria is seeking proposals for the implementation of a new finance and accounting management system to replace our current system. The new system will be used to manage the financial operations of the university, including budgeting, accounting, procurement, and reporting.

2.0 Project Objectives

The UMS application should satisfy the university's mission statement by fulfilling the following objectives:

- Ability to log in and out into a personal account
- Ability to view account term by term, see how much I have paid/ what is owed

- Being notified when payment deadline is approaching
- Reporting and Analytics (term by term, or year by year)
- Automatically generated reports containing useful information (such as analytics)
- Feature that allows user to budget
- Permissions that regulate access to certain parts of the application

3.0 Current System(s)

The current finance and account management system at the university of victoria that is used to satisfy some of the above requirements includes the ability to create an account and login to view financial data that pertains to that particular user. This data involves viewing the amount of tuition that is owed or has been paid per term, being notified when a payment deadline is approaching, and being able to sort the above information by month or year.

4.0 Intended users of the system

Intended users for this system consist of the following:

- Students
- Academic Staff
- IT Department

Individual students will be the main users of this application, with Academic Staff and the IT Department being secondary users.

5.0 Known interaction with external systems

The system will be integrated with external payment processors such as Visa and relevant Canadian banks, as well as where to send cheques.
The financial system is associated with the course registration system. The account balance will be generated after a student has completed the course registration and left the registration page.

6.0 Known constraints to development

Must follow strict privacy laws
Any servers must be located within Canada and any stored data must abide by federal and provincial privacy laws.

Must follow industry standard security protocols
Data storage and data transfer must follow industry standard security protocols to keep data secure.

Budget
This project is to be completed within a $400,000 budget.

7.0 Project Schedule

This is a tentative project schedule and can be subject to change.

ID	Task Name	Start Date	End Date	Duration	Assigned TO	% Complete
1	Create RFP	Jan 19, 2023	Jan 26, 2023	7 Days	University of Bictoria	90%
2	RD 1.0	Jan 27, 2023	Feb 1, 2023	5 Days	Developer	0%
3	RD 1.1	Feb 2, 2023	Feb 4, 2023	2 Days	University of Bictoria	0%
4	RSD 2.0	Feb 4, 2023	Feb 11, 2023	7 Days	Developer	0%
5	Prototype Demo	Feb 13th, 2023	Feb 13th, 2023	1 Days	Developer	0%
6	RSD 3.0	Feb 28th, 2023	March 10, 2023	13 Days	Developer	0%
7	RSD 3.1	Mar 11th, 2023	March 19, 2023	8 Days	University of Bictoria	0%
8	RSD Final	Mar 20th, 2023	April 3, 2023	13 Days	Developer	0%
9	Final Demo	April 4th, 2023	April 5, 2023	1 Days	Developer	0%

8.0 Project team

The University of Victorias team consists of 5 individuals, which can be contacted with the following information:

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9.0 Glossary of terms

Term	Definition
UMS	University Management Software
RFP	Request for Proposal
RD	Requirements Document
RSD	Requirements and Specification Document