The Art Of Living Trust

Samruddhi

Central Repository Portal

—

Version Control : 1.0

18 MAY 2022

Objective

This document establishes process mapping and developing the portal to maintain entire asset controls and registry in shape, state and form on records under one central accessing & HQ controlled portal.

User Roles & Accessibilities

Sr	User	Role	Accessibility
1	Center Admin	Incharge of the designated center	Only records of his/her own centre. Add/Edit/View/Consolidate/Report/Create Transfers/Purchase Request
2	Apex Login	Incharge of assigned state	Only records of his/her assigned State. Add/Edit/View/Consolidate/Report/Approvals/Transfers
3	HQ Admin	Incharge of ALL state functions	All Data Access
4	Auditor	Incharge of Assigned Areas of Audit by HQ	Access to assigned State with Additional module of his/her record verification & comments for CTA with Deadline.

This document outlines the overall requirements for a proposed solution. In this project, we require a design and develop an online and centralized asset management system from which all the records of the assets like- Land & Buildings, Vehicle, IT equipment, Furniture, Office Equipment, Plants, Electric

Equipments, Software's & Patents (Intangible) or Others shape, state, for etc. can be accessed and managed at one place.

There will be four types of users who will be using this application-

1. Center Admin- He is in incharge of the designated center. He can manage and maintain the records of his own center. He can add, edit, view, consolidate, report, create transfers and generate purchase requests of all the assets from his designated center .
2. Apex Login- He is in incharge of the assigned state. He can manage and maintain the records of his/her assigned State. He can add, Edit, View, Consolidate, Report, Approvals, and Transfers of all the assets from his assigned state.
3. HQ Admin- He is Incharge of ALL state functions and has access to all the data.
4. Auditor- He is incharge of Assigned Areas of Audit by HQ. Access to assigned State with Additional module of his/her record verification & comments for CTA with Deadline.

Goals

1. Vendor IT Company will design and set the UI of the entire Samruddhi Inventory portal.

2. Vendor IT Company will code the apps from scratch.

3. Perform UX (User Experience) QA Testing.

4. Perform further testing with the client.

5. Launch the applications.

Scope & Features

Dashboard functionality

To access the dashboard, users need to login in the application. After successful login, users will be redirected to the Dashboard page. Now depending on the type of user out of 4 (i.e. Center admin, Apex Login, HQ admin, Auditor)- users have different functionalities on the dashboard.

HQ Admin

- On the dashboard the HQ admin can add and view states and different centers.
- Assets can be added by defining its category, upload video, picture or any related doc and assign Incharge.
- He can also enter the inventory information of each state and generate MIS reports.

- For adding the inventory information, he can add, edit and delete various categories of inventory.
- If the inventory is added by another type of user- Apex or Center admin then those inventories will also be available for viewing, editing and deleting with HQ admin.
- HQ admin can add and define multiple logins.
- He can track the entire activity of the inventory on his panel- who added the item , when it was added and all the relevant details.
- HQ admin can also add the auditors which are discussed below.

Apex Login

- Apex login type of user can only add and view the inventory details of the state assigned to him.
- They can just view the MIS reports but cannot download them.

Center Admin

- The user can add, edit and view assets of his center only.
- Center admin can transfer its ownership and can also give his acceptance to the ownership.
- From here center admin can also view the items category wise and can edit, view delete or disable them.
- He can also generate the reports of all the assets present in the center assigned to him.

Auditor

- Auditor is added by HQ admin and he can be assigned for multiple states and multiple centers.
- He will be provided with a list of items from the assigned states or centers.
- The list can be filtered as complete or pending.
- The items under the complete list are already audited.
- The items under the pending list need to be audited.
- He opens the details and can provide his score out of 10 against each field of that detail form.
- After completing the scoring of each field, the overall score card of the item will be generated. The color code of the scorecard can be like if the scoring is below five then can be reflected with Red color. If the scoring is above 5 then it can be shown with Green color.
- As per this scorecard, the states and center scorecard will be calculated too and defined in the same kind of color scheme - below 5 - Red and above 5 - Green.

Android Application for Vehicle Drivers

For the vehicle drivers, an Android application will be developed where they will be provided with following functionality

- First they will login into the app.
- After successfully login, their time stamp will be captured in the background and will be provided with 3 options-
  - Confirm Assigned Vehicle- Here driver needs to enter the meter reading as well as take a picture of the vehicle meter and upload. Once his duty is done then he needs to again enter the meter reading and take the photo of the vehicle meter and upload.
  - Fuel Bar- Here captures the meter reading, enter the liters and total amount and upload the receipt.
  - Maintenance Hub -If there was any maintenance also done then the driver needs to enter the amount paid for the maintenance and upload the bill picture here.

Data Capturing Field for Land & Building type of asset

If Land and Building is Free Hold type then its purchase and tax related documents will be uploaded here.

If the Land Building is of Lease type then its Land Certificate doc, Legal Agreement and Tax related document will be uploaded. For tax related docs, a renewal date will also be submitted and 20 days before the expiry the notification will be sent.

Data Capturing Field for IT Equipment type of asset

If the asset is IT equipment, then its serial number needs to be provided, purchase docs need to be uploaded, insurance certificate with start and end date and lastly the serial number video or image needs to be uploaded too.

Data Capturing Field for Vehicle type of asset

For vehicle following information will be captured on the dashboard-

- Vehicle registration number along with the front view image
- Upload insurance related docs with the start and end date. System will also notify the user in email and screen prompt about the end date of insurance.
- Upload the last servicing done related documents including the date of the next service so that the system can notify the user via email and screen prompt about the next service date.
- Upload the 360 degree vehicle video
- Upload emission certificate and provide the end date of the certificate so that system can notify the user
- Assignee the vehicle- State, Apex with fields name, contact number and state and this person will be notified
- And also capture all the other relevant information like vehicle wise, driver wise, GPs wise monthly km, monthly maintenance cost and fuel cost.

Now here, in the notifications, a notification panel will be maintained from where email reminders will be sent 10 Days in advance. It keeps sending reminders until snoozed or update with relevant documents is completed with new expiry dates & details.

After every 3 months, vehicle owner/assignee should get disclaimer of acceptance of asset declaration.

Data Capturing Field for Furniture type of asset

If the asset is furniture type, then its purchase docs need to be uploaded, warranty / guarantee details, video or image needs to be uploaded too. (Need more information on its fields.)

Data Capturing Field for Office Equipment type of asset

If the asset office type, then its serial number needs to be provided, purchase docs need to be uploaded; video or image needs to be uploaded too.

Data Capturing Field for Plants type of asset

If the asset is plant type, then its information like indoor plant or outdoor and other fields (which need to be discussed with the client) and video or image needs to be uploaded too.

Data Capturing Field for Electric Equipment type of asset

If the asset is electric equipment, then its serial number needs to be provided, purchase docs need to be uploaded, insurance certificate with start and end date and lastly the serial number video or image needs to be uploaded too.

Data Capturing Field for Software/ Patents Equipment type of asset

If the asset is software/patent equipment, then its purchase date to be provided and purchase docs need to be uploaded.

Data Capturing Field for Other type of asset

If the asset is IT equipment, then its information like what type of asset it is, its images / videos needs to be uploaded along with the purchase docs.

Suggested Technology Stack
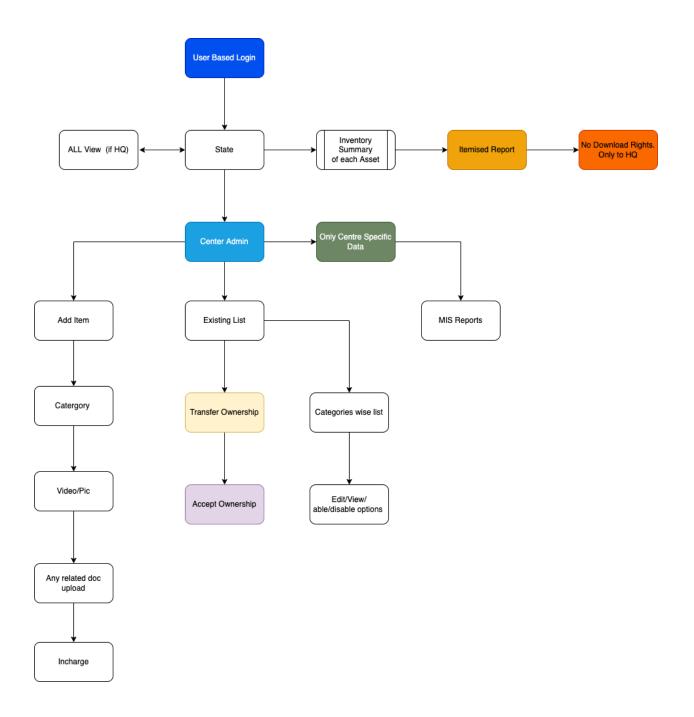
Vendor IT company to mention the technical platform used with all necessary coding language along with time frame and estimated cost.

UI/UX

Quicksand Font to be used

Corporate theme based colour palette can be used.

Dashboard View: (Based on user accessibility controls)

Categories of Assets

1. Land & Buildings
2. Vehicle
3. IT equipments
4. Furniture
5. Office Equipment
6. Plants
7. Electric Equipments
8. Softwares & Patents (Intangible)
9. Others

Data Capture Fields of Each Assets

1. Land & Building

Notes:

1. Only HQ will have rights to Add/Edit/View/Report/Delete
2. All Delete rules apply. (Log of delete remains in archives)

2. Vehicle

Back Office

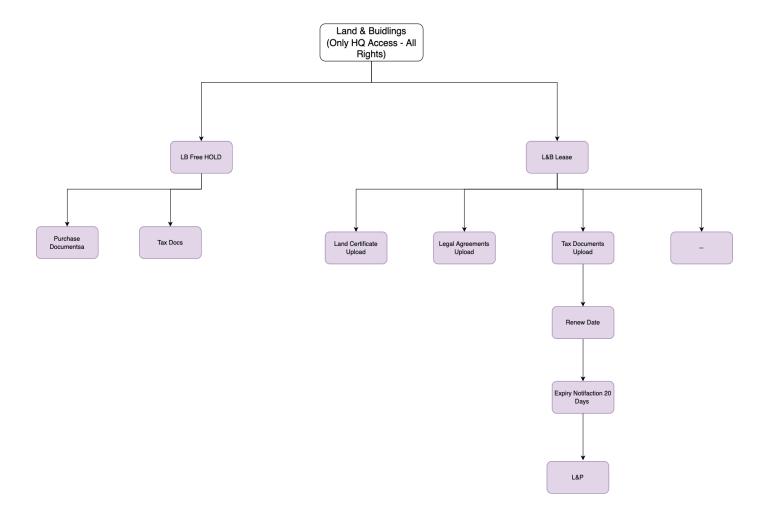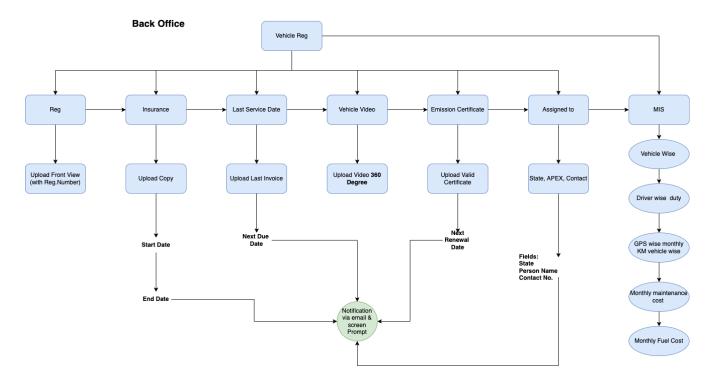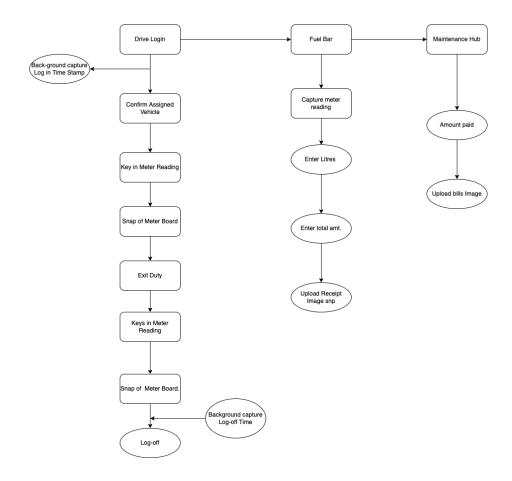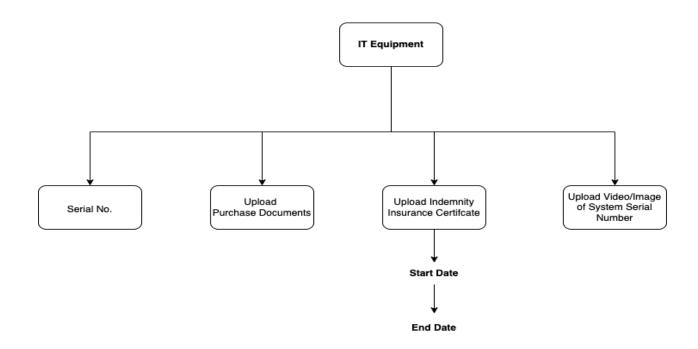```
                                          ┌──────────────┐
                                          │ Vehicle Reg │
                                          └──────────────┘
   ┌────────┐   ┌────────────┐   ┌──────────────────┐   ┌──────────────┐   ┌──────────────────────┐   ┌─────────────┐   ┌──────┐
   │ Reg   │→ │ Insurance │   │ Last Service Date│   │ Vehicle Video│   │ Emission Certificate │   │ Assigned to │   │ MIS │
   └────────┘   └────────────┘   └──────────────────┘   └──────────────┘   └──────────────────────┘   └─────────────┘   └──────┘
```

Reg → Upload Front View (with Reg.Number)

Insurance → Upload Copy → Start Date → End Date

Last Service Date → Upload Last Invoice → Next Due Date

Vehicle Video → Upload Video **360 Degree**

Emission Certificate → Upload Valid Certificate → **Next Renewal Date**

Assigned to → State, APEX, Contact

Fields:
State
Person Name
Contact No.

MIS → Vehicle Wise → Driver wise duty → GPS wise monthly KM vehicle wise → Monthly maintenance cost → Monthly Fuel Cost

Notification via email & screen Prompt

## Front Office

```
   ┌─────────────┐        ┌──────────┐        ┌──────────────────┐
   │ Drive Login │   →    │ Fuel Bar │   →    │ Maintenance Hub  │
   └─────────────┘        └──────────┘        └──────────────────┘
```

Drive Login → Back-ground capture Log in Time Stamp

Drive Login → Confirm Assigned Vehicle → Key in Meter Reading → Snap of Meter Board → Exit Duty → Keys in Meter Reading → Snap of Meter Board. → Log-off

Background capture Log-off Time → Log-off

Fuel Bar → Capture meter reading → Enter Litres → Enter total amt. → Upload Receipt Image snp

Maintenance Hub → Amount paid → Upload bills Image

13

Notes :

1) Date of renewable items can be added manually.
2) It has to have an auto-notification feature on a notification panel as well as email reminder 10 Days in advance. It keeps sending reminders until snoozed or updated with documents is completed with new expiry dates & details.
3) After every 3 months, Vehicle owner/assigned to should get disclaimer of acceptance of asset declaration.

3. IT Equipment

4. Rest of the Assets:

Flow Fields from above point remains as is.

5. Report Templates have been attached.

https://docs.google.com/spreadsheets/d/1HswHDOjU3dVfT4-xfjvq9iL9p3HdMTkgM58wN
PUV3a4/edit?usp=sharing