

Introduction to MobileERP AI Copilot System

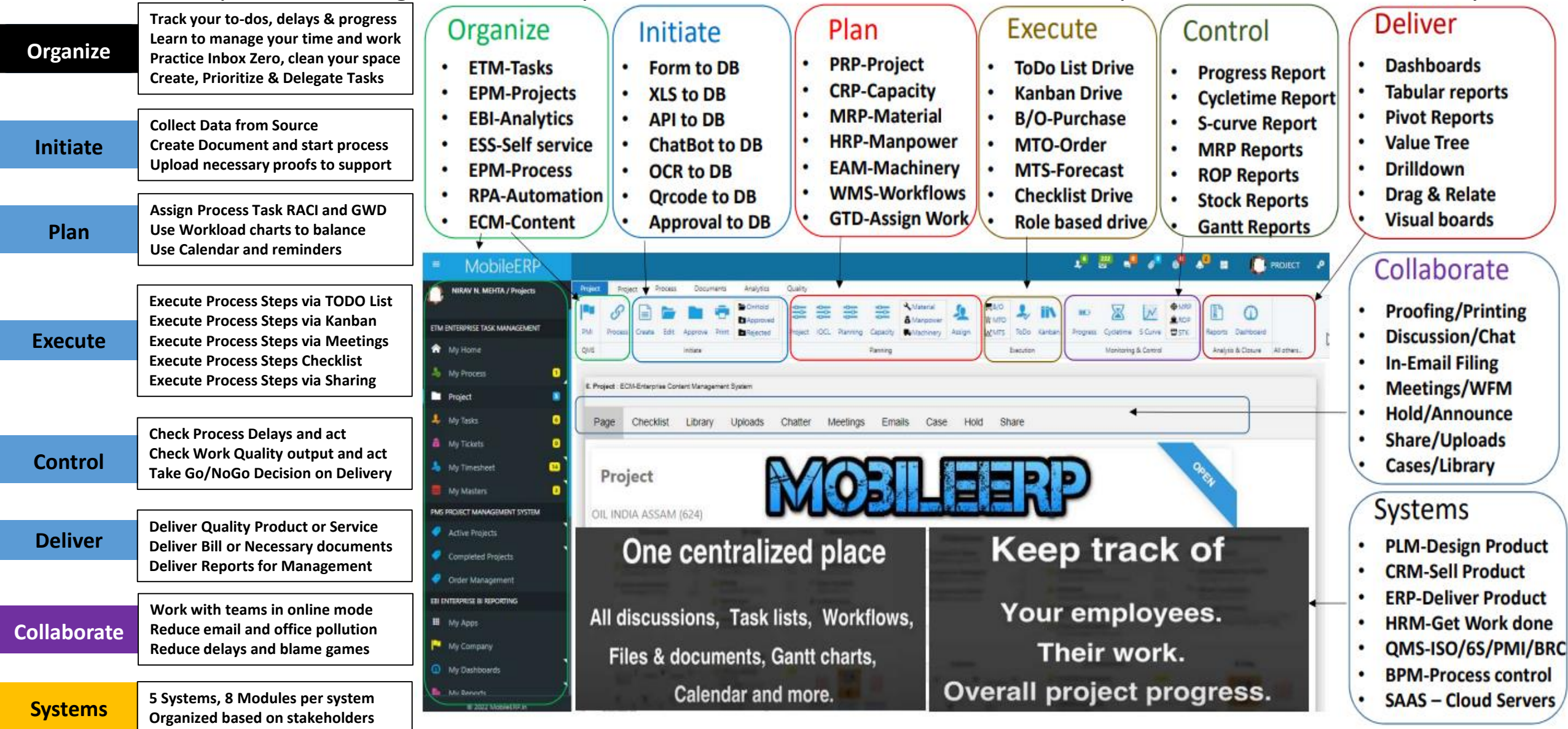
ERP stands for Enterprise Resource Planning. MobileERP is a type of software that organizations use to manage day-to-day business activities such as accounting, procurement, project management, risk management and compliance, human resource, payroll, construction, manufacturing, services and supply chain operations. It includes enterprise performance management, software that helps plan, budget, predict, and report on an organization's financial results. MobileERP tie together a multitude of business processes and enable the flow of data between them. By collecting an organization's shared transactional data from multiple sources, MobileERP systems eliminate data duplication and provide data integrity with a single source of truth. Today, ERP systems are critical for managing thousands of businesses of all sizes and in all industries. Without EXPERIENCE of working on ERP Systems an employee is considered uneducated and cannot work in company for long or cannot progress.

AI stands for Artificial Intelligence. It is a branch of computer science that deals with the creation of intelligent machines that can perform tasks that typically require human intelligence, such as visual perception, speech recognition, decision-making, and language translation. MobileERP is AI based system which makes management decisions to automatically defining and allocating the work to specific employees into their TODO List. MobileERP AI also monitors and followup work which are not done or delayed and gets it done in time and budget. MobileERP AI works like Manager to get work done.

Copilot is an AI-powered feature that helps you do more than you ever thought possible, built right into your ERP. It is a product of MobileERP that leverages the power of AI to boost productivity, unlock creativity, and helps you understand work better with a simple TODO List or Chat experience. With the help of Copilot employee or user can drive software from their simple TODO List by avoiding navigation between complicated menus. Copilot created virtual menuless ERP Software for your organization where employees just focus on their work and do not waste time in finding forms and reports in complicated menus. Copilots also helps your employees operate ERP Software without or with little training. Thus Copilot helps you employees to complete their work on hand faster and in time and budget. **Put your business on autopilot mode with copilot.**

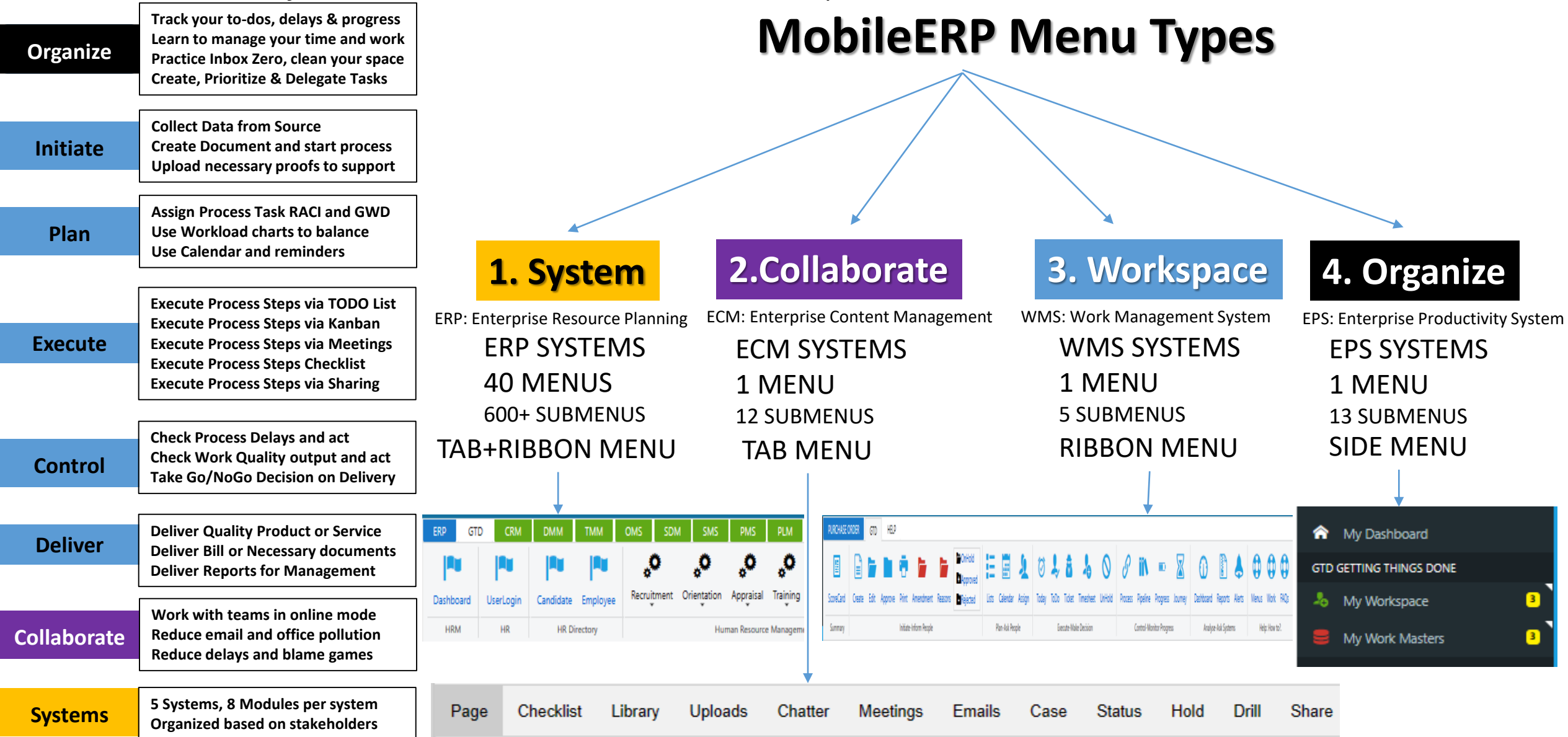
MobileERP AI Copilot System for Employees -10X Work output with ERP System

Mobile ERP (Enterprise Resource Planning) is a software application that enables users to access and share business information directly from their computer or mobile device . It simplifies and streamlines day-to-day business processes by reducing the time and resources required to manage and run complex business. This is web based, menu less, process based AI based ERP System.



MobileERP AI Copilot System for Employees – There are 4 Types of Menus

MobileERP Menu System is a list of options presented to the user in a graphical user interface (GUI). Menus are used to allow the user to access program modules, features and commands. MobileERP uses Ribbon Style menu for each process documents. MobileERP also uses Left Side Module wise list menu which will compress based on device used like Mobile. There are 4 menu types



Process Flow types:

GTD GETTING THINGS DONE

My Workspace

Mr

lom

Pr

Dci

Project

5

248

0

2193

196

183

Business Process Design Master:SCM Procurement/Internal Value Stream Mapping



Checklist

Steps to Follow

Start

1. Upload and Enter Approved Vendor List Itemwise Done on 30/01/2024 13:27:35

2. Upload MR in PDF/Excel Format Done on 30/01/2024 13:27:40

3. Upload and Enter Price Format / BOQ in Excel Done on 30/01/2024 13:27:48

End SENT TO MR

Timelines

MR 490. Print

RFQ 706. Print

RFQ 707. Print

RFQ 706. QUOTE. Show

RFQ 707. QUOTE. Show

PR NOT CREATED

Tickets

Ticket Assign To Do Doing Done

Add New Case/Ticket

My Work Tickets

Draft

ToDo

InProgress

Completed

My Case/Tickets

ID	Raised By	Work For	Date	Subject	Upload	Assign	Approve	Reject
160	Greeshma Mishra	Shaktipratap Rajeshpratap Yadav	30/01/2024 17:14:19	Technical Query-1 for Bharat Mineral - VOC Carbon Media	Activity	Assign	Approve	Cancel

Step# Step Assigned To Target Done

Name

New SANDIP CHAKRABORTY[SandipC] dd-mm-yyyy Add

Hold

OnHold Documents

My Hold

Active Hold

Hold History

OnHold Document

Person Responsible for this Hold .. [PURCHASE]KEYUR J. BHATT

Reason for Hold:

Type why you want to hold this document?.

OnHold

[illegible]

1. Systems Menu: MobileERP is made up of 5 Systems and 8 modules in each system.

EMPLOYEES – 10X Work	CUSTOMER– 10X Sales	SUPPLIER -10X Savings	MANPOWER-10X Usage	MONEY-10X Profit/ROI
GTD: Getting Things Done ETM: Enterprise Task Management DRS: Daily Reporting System ECM: Enterprise Content Mgmt DSS: Department Self Service TSS: Travel & Claim Self Service ESS: Employee Self Service ACM: Access Control Management	CRM: Customer Relation Mgmt DMM: Digital Marketing Mgmt TMM: Tender Marketing Mgmt OMS: Offer Management System SDM: Sales & Distribution Mgmt SMS: Service Management System PMS: Project Management System PLM:Product Lifecycle Management	SCM: Supply Chain Management PPP: Plan, Procure & Purchase MFG: Manufacturing Management EPC: Construction Management IMS: Inventory Management LMS: Logistics Management MMS: Maintenance Mgmt System QCM: Quality Control Management	HCM: Human Capital Management TLM: Travel & Leave Management TOM: Time Office Management PAY: Payroll Management WAG: Wage Management LMS: Learning Management System PGM: Performance & Goals Mgmt P&A: Personal & Administration	ACC: Accounts Management FRM: Finance Resource Mgmt. CSM: Costing & Spend Mgmt. GST: Goods & Service Tax GRC: Governance,Risk&Compliance CGM: Corporate Governance Mgmt. EAM: Enterprise Asset Mgmt. EXIM: Export/Import Management

BLACK

GREEN

PINK

RED

ORANGE

ERP

GTD

CRM

DMM

TMM

OMS

SDM

SMS

PMS

SCM

PPP

MFG

EPC

WMS

LMS

QCM

PLM

HCM

TLM

TOM

PAY

WAG

ESS

PA

ACC

FRM

CSM

GST

GRC

EAM

MMS

ScoreCard

Create

Edit

Approve

Print

OnHold

Approved

Rejected

Lists

Calendar

Assign

Project

Gantt

Planning

Capacity

Material

Manpower

Machinery

B/O

MTO

MRP

ROP

MTS

STK

Today

ToDo

Kanban

Ticket

UnHold

Timesheet

Progress

Journey

SCurve

Dashboard

Reports

Alerts

Pipeline

Process

Summary

Initiate-Inform People

Plan-Ask People

Execute-Make Decision

Control-Monitor Progress

Analyse-Ask Systems

Others

ORGANIZE

INITIATE

PLAN

EXECUTE

CONTROL

DELIVER

Work Done: Actual Performance

38

UnApproved

More info →

0

OnHold

More info →

0

Approved

More info →

0

Rejected

More info →

TILL DATE

38

documents

THIS MONTH

0

documents

TODAY

0

documents

LAST CREATED ON

20/07/2022

this documents

TODO

1

process activities

IN PROGRESS

15

process activities

DONE

275

process activities

TOTAL

291

process activities

Team: Roles and Responsibility

COLLABORATE

DRIVER

ERP OPERATOR

APPROVER

RESPONSIBLE MANAGER

CONTRIBUTOR

PROBLEM SOLVER

INFORMED

TOP MANAGEMENT

2. Collaborate Menu: There are 12 types of collaboration and document cum content management systems

ECM: Enterprise Collaboration refers to the process of multiple individuals or groups working together to achieve a common goal. In the context of computer software, collaboration refers to the ability of multiple users to work together on the same document or project over local and remote networks at the same time. Collaboration software eliminates the need to send files back and forth via email or a copy service such as Dropbox in order that multiple users can participate. Collaboration software can be used to facilitate communication, project management, and collective creation, enhancing productivity. It can support remote work, streamline workflows, and foster creativity and innovation within teams.

1. Page: will show your document data

2. Checklist will show what steps to follow to do work

3. Library will give things you can refer to complete this work

4. Uploads will give you space to upload your work in pdf, xls, ppt etc.

5. Chatter will help you do chat with your team

6. Meetings will help you organize meeting for this work

7. Emails will help you send or file emails for this work

MobileERP

1102.Greeshma Mishra
Process Department
Paramount Limited
FY: 2324 - 04/01/2024
For Help Contact: Ashish

My Dashboard

ETM ENTERPRISE TASK MANAGEMENT

- My Workspace (5)
- My TaskList (4589)
- My TodayList (4589)
- My Tickets (0)
- My OnHoldList (4589)
- My Timesheet (27)
- My Calendar
- My Dailyreport
- My Documents (1)

TSS TRAVEL SELF SERVICE

- Outdoor Visit Request
- Travel Request
- Booking Request

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Created with SoftRobot biz

Kanban : All

Sprint 2023: 1 2 3 4 5 6 7 8 9 10 11 12

Sprint 2024: 1 2 3 4 5 6 7 8 9 10 11 12

Backlog > ToDO > InProgress > Hold Status

143. DCI : ECM-Enterprise Content Management System - Schedule Activity ...

1 2 3 4 5 6 7 8 9 10 11 12 Under Approval / Approved / Rejected

Page Checklist Library Uploads Chatter Meetings Emails Case Status Hold Drill Share

DCI

Entered By :NIRAV N. MEHTA

DCID	143	UID	49
DCIDATE	25/04/2022 13:52:26	SITEID	0
DCINO	1	TASK	Thickened Bio Sump Agitator
PROJECT	IOCL LUPECH	PROJECTMASTERID	91
CALENDERID	17		

APPROVED

OPEN

8. Case will help you create New Tickets or Work for other users to complete this work

9. Status will show status of your work as per Process Workflow

11. Drill will help you drillup and down to related documents to this work

10. Hold will help you create alert for user because of whom your work cannot proceed. He has to unhold.

12. Share will help you share this Ticket and all docs to others

3. Workspace Menu: There is 5 steps to work as per process flow administrator in MobileERP System

WMS: Work Management System menu is a list of options presented to the user in a graphical user interface (GUI). Menus are used to allow the user to access program modules, features and commands. MobileERP uses Ribbon Style menu for each process documents as follows. WMS is made-up of workspace. Workspace is the area where someone works. This could be a physical space like an office or desk, or a digital space like the area on a computer screen where you work. For example, in the context of MobileERP, a workspace is a screen space on your computer or mobile where you enter, approve, print or store your data and other resources that are required to run your application, process or business.

Initiate

Collect Data from Source
Create Document and start process
Upload necessary proofs to support

Plan

Assign Process Task RACI and GWD
Use Workload charts to balance
Use Calendar and reminders

Execute

Execute Process Steps via TODO List
Execute Process Steps via Kanban
Execute Process Steps via Meetings
Execute Process Steps Checklist
Execute Process Steps via Sharing

Control

Check Process Delays and act
Check Work Quality output and act
Take Go/NoGo Decision on Delivery

Deliver

Deliver Quality Product or Service
Deliver Bill or Necessary documents
Deliver Reports for Management

20/01/2024 16:12:02

PURCHASE ORDER

GTD

HELP

ScoreCard

Create

Edit

Approve

Print

Amendment

Reasons

OnHold

Approved

Rejected

Lists

Calendar

Assign

Today

ToDo

Ticket

Timesheet

UnHold

Process

Pipeline

Progress

Journey

Dashboard

Reports

Alerts

Menus

Work

FAQs

Summary

Initiate-Inform People

Plan-Ask People

Execute-Make Decision

Control-Monitor Progress

Analyse-Ask Systems

Help: How to?

MobileERP Workspace: Help on How to work with MobileERP Wo

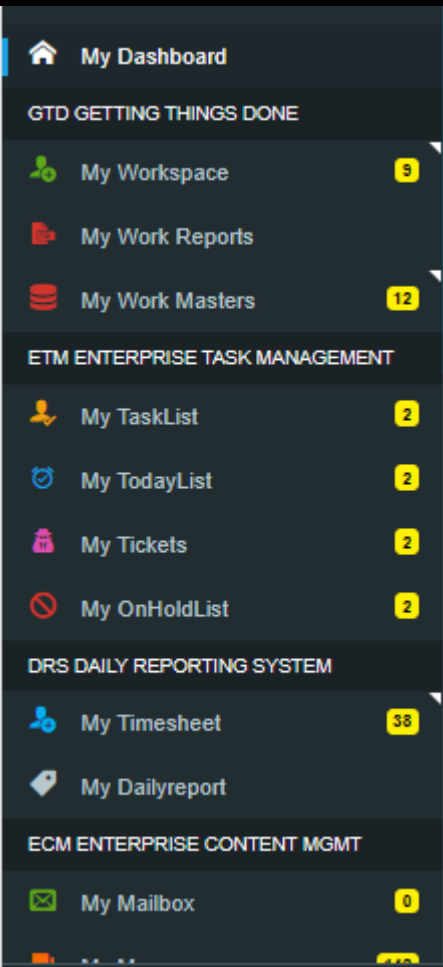
A MOBILEERP WORKFLOW		MR TO PR	INITIATE-GENERATE WORK			PLAN-ASK PEOPLE TO DO WORK	EXECUTE-DO THE WORK/MAKE DECISIONS						
#	TODO LIST OF	RESPONSIBLE	CREATE	APPROVE	PRINT	ASSIGN WORK	PROCESS STEP 1	PROCESS STEP 2	PROCESS STEP 3	PROCESS STEP 4	PROCESS STEP 5	PROCESS STEP 6	SCORE
1	DRIVER												
	ERP OPERATOR	KOMAL	ENTER MR		PRINT MR								
2	APPROVER												
	MANAGER	PANCHAL		APPROVE MR		GIVE PROCESS RIGHTS							CONTROL
3	CONTRIBUTOR												
	PROCESS DRIVER	SHAKTI					ENTER RFQ VENDOR LIST	SEND RFQ	ENTER QUOTE			FINALIZE PR	
4	MANAGEMENT												
	DECISION MAKER	KEYURBHAI								COMPARE QUOTE	APPROVE QUOTE		
5	AUTOMATION												
	SYSTEM AUTO CREATES	SYSTEM	AUTO FROM PROJECT	AUTO	NOT REQ	AUTO BY SYSTEM	AUTO BY SYSTEM	AUTO EMAIL/SMS	VIA SUPPLIER PORTAL	AUTO BY AI SYSTEM	AUTO	AUTO VIA AI	
X	TIMELINE	DAY	1	2	3	4	5	6	14	15	16	17	DAILY
B MOBILEERP WORKFLOW		PR TO PO	INITIATE-GENERATE WORK			PLAN-ASK PEOPLE TO DO WORK	EXECUTE-DO THE WORK/MAKE DECISIONS						
#	TODO LIST OF	RESPONSIBLE	CREATE	APPROVE	PRINT	ASSIGN WORK	PROCESS STEP 1	PROCESS STEP 2	PROCESS STEP 3	PROCESS STEP 4	PROCESS STEP 5	PROCESS STEP 6	SCORE
1	DRIVER												
	ERP OPERATOR	KOMAL	ENTER DRAFT PR		PRINT PR								
2	APPROVER												
	MANAGER	PANCHAL		APPROVE PR		GIVE PROCESS RIGHTS							CONTROL
3	CONTRIBUTOR												
	PROCESS DRIVER	MAMTA					SETUP ITEM MASTER	CHECK STOCK	IDENTIFY SHORTAGES	ENTER SUPPLIER/RATE	ENTER TERMS	FINALIZE DRAFT PO	
4	MANAGEMENT												
	DECISION MAKER	SHAKTI					FINALIZE VENDOR/ITEM	TRANSFER STOCK	ORDER ITEM FINALIZED	NEGOTIATES RATES	NEGOTIATES TERMS	CHECKS DRAFT PO	
5	AUTOMATION												
	SYSTEM AUTO CREATES	SYSTEM	ITEM AUTO ENTRY	DRAFT PO	NOT REQ	AUTO BY SYSTEM	AUTO BY SYSTEM	AUTO VIA MRP	AUTO VIA MRP	AUTO BY AI SYSTEM	AUTO BY AI SYSTEM		
X	TIMELINE	DAY	1	2	3	4	5	6	7	8	9	10	DAILY
C MOBILEERP WORKFLOW		PO TO MIR	INITIATE-GENERATE WORK			PLAN-ASK PEOPLE TO DO WORK	EXECUTE-DO THE WORK/MAKE DECISIONS						

4. Organize Menu: Organize Work is made up of 8+ Productivity related modules.

EPS: Enterprise productivity systems are sets of practices, guidelines, methodologies, and tools that help people get things done efficiently and effectively in a business environment. They can be used to manage projects, tasks, and workflows, and to improve communication and collaboration among team members. There are many productivity systems available that can help you work smarter, not harder. MobileERP has most popular 8+ productivity systems self service as follows:

- 1. GTD: Getting Things Done :** *A productivity system created by David Allen that helps with organizing tasks and priorities*
 - a. The Pomodoro Technique.** A time management method that uses a timer to break down work into intervals, traditionally 25 minutes in length, separated by short breaks. Each Task becomes ticket and system reminds if not done with delays.
 - b. Zen to Done (ZTD):** A productivity system that combines the principles of GTD with other productivity techniques
 - c. Kanban:** A visual project management system that helps teams manage their workflow
 - d. Don't Break the Chain:** A productivity system that involves tracking your progress on a calendar to build momentum and motivation
 - e. Eat the Frog:** A productivity system that involves tackling your most challenging task first thing in the morning
- 2. ETM: Enterprise Task Management:** *Main purpose of Task Management System is to get Things Done in Time and Budget*
- 3. DRS: Daily Reporting System:** *Daily reports keep your company updated on what has been completed in the past 24 hours.*
- 4. ECM: Enterprise Content Management:** *It store & process business assets throughout their life cycle, from creation to destruction.*
- 5. DSS: Department Self Service:** *It is department level electronic work requests which reduces reliance on traditional paper-based or emails*
- 6. TSS: Travel & Claim Self Service :** *It is HOD level travel requests which reduces reliance on traditional paper-based or emails*
- 7. ESS: Employee Self Service:** *It is HR level leave etc. requests which reduces reliance on traditional paper-based or emails*
- 8. ACM: Access Control Management:** *It is self service to manage own profile, user rights and passwords to manage work.*
- 9. PMS: Project Management System (Only for Project Managers):** *This is self service to initiate and create + assign project tasks*
- 10. PCS: Project Control Systems (Only for Project Managers):** *This is self service to monitor and act on pending project tasks.*
- 11. EBI: Enterprise Business Intelligent Reporting Systems (Only for Managers):** *This is Pivots, Dashboards, ValueTree, Drill etc.*
- 12. EAI: Enterprise Artificial Intelligence Reporting Systems (Only for Managers):** *This is Chatbots, ChatGPT, NLP, Timebots etc.*
- 13. OMS: Organization Management Systems (Only for System Administrators):** *This is where you can configure your system.*

Organize Menu 1: Understanding your Menu – GTD System



GTD: Getting Things Done System

Getting Things Done (GTD) is a personal productivity system developed by David Allen. It is a time management system that helps you complete tasks and meet commitments in a stress-free and efficient manner using a comprehensive system of lists and calendars. The fundamental idea of the GTD method is to put down all your tasks in writing to ensure that you won't forget anything. The GTD method is made up of five simple practices to systematize the clutter in your brain and get things done:

Capture Everything: Capture anything that crosses your mind. Nothing is too big or small! These items go directly into your inboxes.

Clarify: Process what you've captured into clear and concrete action steps. Decide if an item is a project, next action, or reference.

Organize: Put everything into the right place. Add dates to your calendar, delegate projects to other people, file away reference material, and sort your tasks.

Review: Frequently look over, update, and revise your lists.

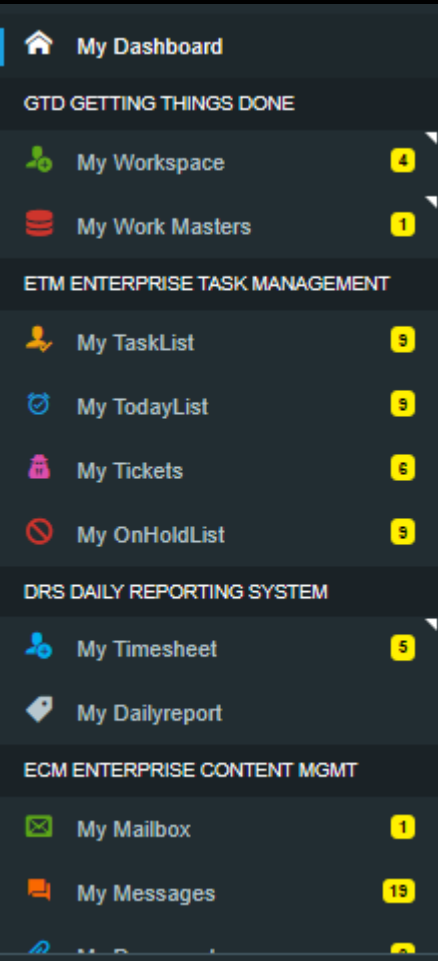
Engage: Get to work on the important stuff.

When your GTD workflow is set up right, you'll be able to confidently answer "what should I be working on?" at any given moment without worrying that you might forget something important you need to do later .

GTD System is made of 3 things:

- 1. Workspace:** Workspaces are made of content like **Initiate:** Document Creation, **Plan:** Assign Process Rights and Generate TODO List for people which will reflect in next ETM Enterprise Task Management System. **Execute:** Make decision to execute or follow-up with people to get it done. **Control:** Monitor Progress and Performance to avoid delays. **Analyse:** Ask system reports etc.
- 2. WorkReports:** Will show all reports to get the work done in time and budget.
- 3. WorkMasters:** Will help you add or modify any dependency master data to make system operational.

Organize Menu 2: Understanding your Menu – ETM System



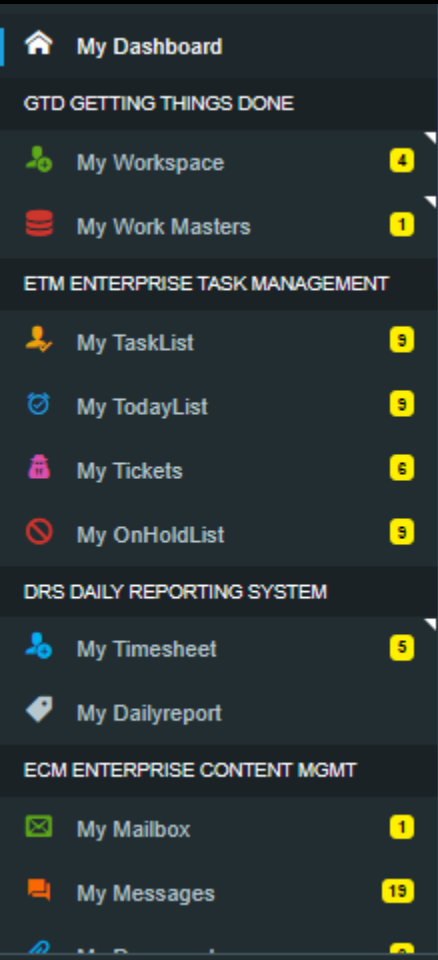
ETM: Enterprise Task Management System

ETM Enterprise Task Management System is a task management system based on the **SoftRobot platform**. It is a simple and agile solution that is easy to implement and embed, for overall task management in an organization. Main purpose of Task Management System is to get Things Done in Time and Budget.

ETM System is made of 6 things:

- 1. Tasklist:** Tasklist Kanban is a project management methodology that involves creating visual cards that list details about a task and organizing them into lists on a board that represent different stages of a production process. It is a visualization tool that enables you to optimize the flow of your work and manage work across your team or organization, which means increased productivity and task visibility. The Kanban board is a simple and effective way to manage tasks and projects. It can be used for personal productivity, team collaboration, and enterprise task management. The Kanban board is made up of columns that represent different stages of a project, such as “To Do,” “In Progress,” and “Done.” Each task is represented by a card that contains information about the task, such as its priority, due date, and assignee. Tasklist Kanban is a great way to visualize your work and stay organized. It can help you prioritize your tasks, track your progress, and ensure that nothing falls through the cracks.
- 2. Todaylist:** This Kanban List shows Tasks Scheduled for Today and Tomorrow along with Backlog Tasks. This helps you in scheduling your tasks for faster work output.
- 3. Tickets:** A ticketing system is a computer program designed to track inquiries, tasks, and services. It offers an organized way to manage specific service requests and technical support issues through problem tracking and issue resolution. This type of application has features like ticket categorization, automated routing, real-time updates, notification settings, and detailed reporting metrics. All tickets will land up in above Tasklists.
- 4. OnHoldlist:** This place shows other peoples work hold due to you.

Organize Menu 3: Understanding your Menu – DRS System



DRS: Daily Reporting System

What Is a Daily Reporting System?

A daily report is a document that lists the activities that happened during a specific day. It's typically used by managers to keep track of their employees' activities and to analyze their productivity.

You can create it at any time during the project. Still, it's helpful when multiple stakeholders are involved and everyone needs to stay informed about what's happening in their respective areas.

While it doesn't have to be complex and detailed, it should include several different types of info. The more info you add, the better it will be for your team.

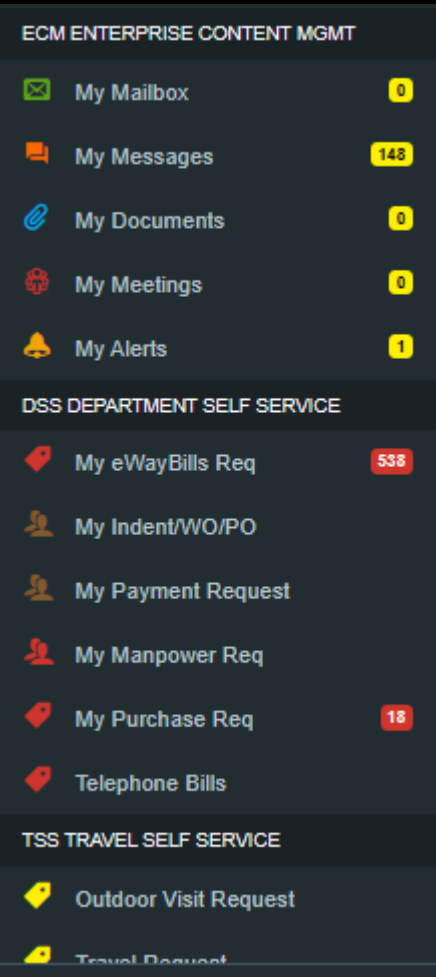
Daily reports keep your company updated on what has been completed in the past 24 hours. Using a daily report template ensures you don't spend your entire day typing up updates from scratch. A daily report template is a tool that offers daily status updates at 24-hour intervals. It delivers a high-level overview of work completed yesterday, work that needs to be prioritized today, and work that is forecast to be important for tomorrow. DRS has:

1. **Timesheet:** This is where you are supposed to fill work done by you hour wise during the day.
2. **Dailyreport:** This is where you are supposed to do daily reporting on your workspace documents

Benefits of a Daily Report System

1. In a sentence: A daily report template ensures your team gets. Stuff. Done.
2. Offers a clear overview of the day's priorities
3. Keeps individuals and entire departments updated on projects
4. Ensures that major deadlines don't "sneak up" on team members
5. Helps individuals plan their days more efficiently, as they receive a preview of the day's priorities 24 hours in advance
6. Saves companies time by eliminating the need for check-ins and meetings

Organize Menu 4: Understanding your Menu – ECM Systems



ECM: Enterprise Content Management System

Enterprise Content Management (ECM) is a process of managing and applying a company's information to support its processes and business goals. It involves the collection, management, and provision of access to documents and files across an organization. ECM systems store and process business assets throughout their complete life cycle, from creation to destruction. This consists of:

Mailbox: Incoming email filing system is a process of organizing incoming emails in a structured manner. It helps users to manage their emails efficiently and saves time. There are several ways to organize incoming emails, such as using labels, folders, or rules. MobileERP helps you connect your emails with working document records.

Messages: A chat messaging system in an enterprise is a platform that enables employees to communicate with each other in real-time. It is a tool that allows employees to collaborate, share information, and work together on projects. Chat messaging systems can be used for one-on-one conversations, group chats, and team discussions.

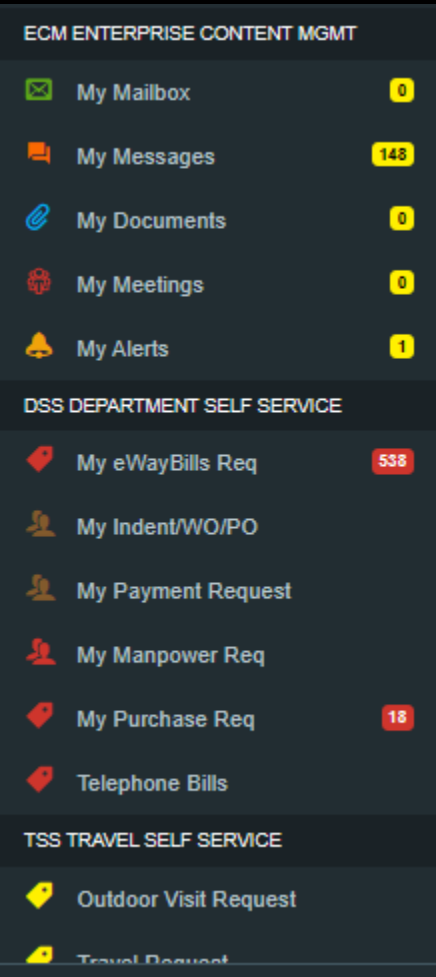
A Document Management System (DMS) is a subset of ECM that is used to manage documents only. It streamlines document workflows and simplifies regulatory compliance. DMS systems eliminate paper documents and the related filing systems. They digitize printed content and store it in a secure repository, enhancing collaboration and sharing.

A Meeting Management System is a digital tool that helps organizations plan, organize, conduct, and record meetings. It can help automate pre-meeting activities, manage schedules, send invites, draft agendas, take meeting minutes, and more.

Enterprise Alert and Notification systems are software that enable rapid, two-way communications with stakeholders using a variety of channels for either emergency alerts or routine messages.

ECM systems help organizations automate processes, increase productivity, and encourage teams to work better together. They also ensure that information is easily accessible and as useful as possible at any point throughout the content lifecycle.

Organize Menu 5: Understanding your Menu – DSS Systems



DSS: Department Self Service

Department self-service (DSS) is a web-based technology within company that empowers employees to manage various purchase and payments tasks independently, enhancing efficiency and reducing reliance on traditional paper-based or manual processes.

eWayBill is system for purchase department to validate bills received against PO and send them to accounts department for faster GST Credit and Payments.

Indent/WO/PO: This is PO/WO for non stock items made by every department while making a purchase of Products, Raw Material, Assets or Services against a defined budget.

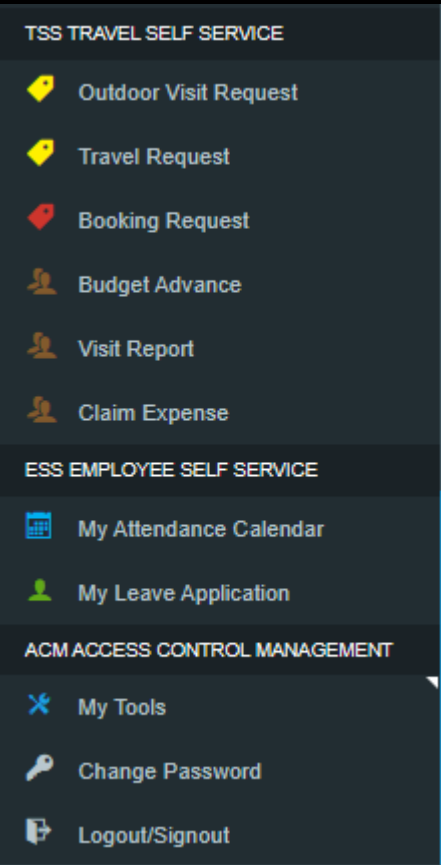
Payment Request: Using this documents every department has to make payment request to accounts department by uploading necessary proofs and explanation. It can be payment against Bills or Advance Payments for Tour or Travel etc.

Manpower Request: All departments can make manpower request to HR Department if they need manpower for department, project or manufacturing plant etc.

Purchase Request: For all stock related purchases outside project requirement a purchase request if made to Purchase Department. All items purchased via this method will goto stores and stock.

Telephone Bills: All employees and departments are supposed to submit their telephone bills to check usage against the allotted budget and for sanction of payments.

Organize Menu 6: Understanding your Menu – TSS Systems



TSS: Travel Self Service part of Employee self service

TSS: Travel Self Service is part of Employee Self Service. Travel, Budget, Expense and Claim self-service for employees is a system that allows employees to manage their travel expenses and claims. It is a convenient way for employees to submit their travel expenses and get reimbursed for them. The system typically includes the following features:

Travel policy: A set of guidelines that define the rules and regulations for employee travel. It clarifies the organization's position on travel within and across countries, and covers expense reimbursement in all these scenarios.

Travel Request: Any employee going on travelling has to enter travel request and get it approved from their HOD and HR to get its effect in Payroll at end of month.

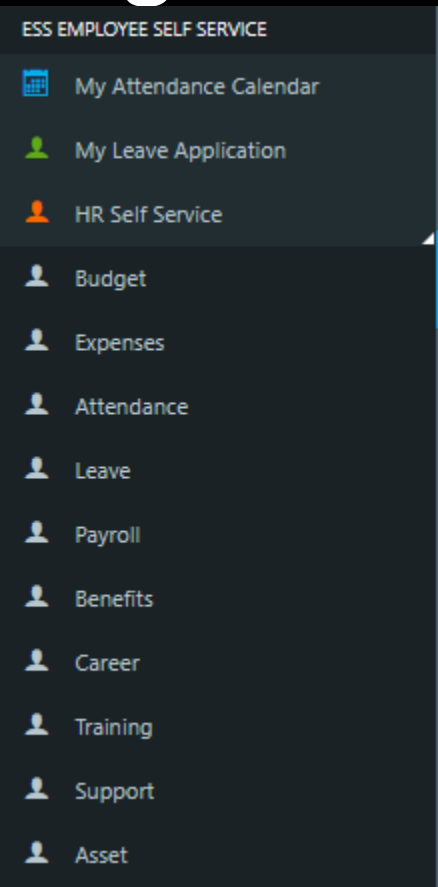
Booking Request: All employees can request to book Rail or Air Tickets or Hotel to Travel HelpDesk after Travel Request is approved.

Budget Advance: A feature that allows employees to set budgets for their travel expenses. This helps them keep track of their expenses and ensures that they do not exceed their budget.

Claim Expense: A feature that allows employees to submit their travel expenses and get reimbursed for them. Employees can submit their expenses online and track the status of their claims.

Claim management: A feature that allows employees to manage their travel claims. Employees can view their claims history, track the status of their claims, and receive notifications when their claims are processed.

Organize Menu 7: Understanding your Menu – ESS Systems



ESS: Employee Self Service

Employee self-service (ESS) is a web-based technology within company HR systems that empowers employees to manage personal information, access resources, and perform administrative tasks independently, enhancing efficiency and reducing reliance on traditional paper-based or manual processes. ESS is designed to alleviate much of the burden of HR departments, digitizing and automating important tasks. At the same time, ESS gives employees more-direct control over their own data.

Attendance Calendar is employee attendance data for its own analysis. If any error found he can contact TIMEOFFICE Department and correct those errors.

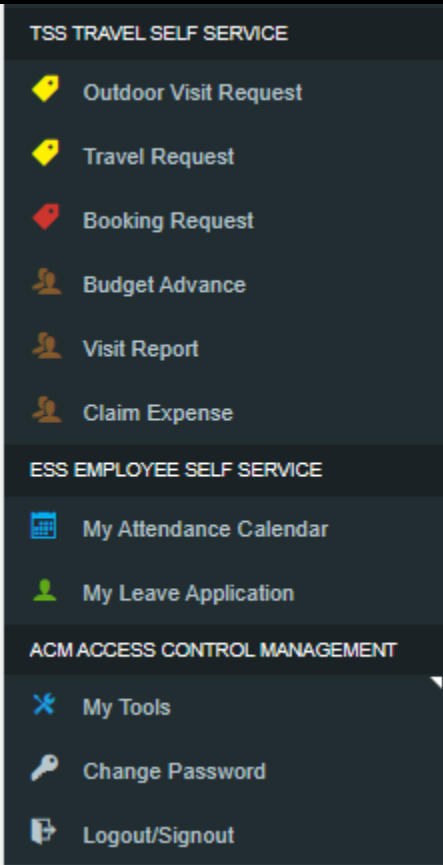
Leave Application: This is where employees can check their leave balance and submit leave application.

HR Self Service: This is different set of self service for employees. This enhance Employee confidence in company and helps employee do better work.

Various self-service related to HR are grouped under this service:

- A. Budget and Expense claim of employees are managed here and submitted to Finance Dept.
- B. Attendance, Leave and Payroll gives direct access to employees on personal data.
- C. Benefits, Career and Training gives Employee Talent & Career Development requests to HR.
- D. Support is to request specific service and Asset is to manage allotted asset and request new.

Organize Menu 8: Understanding your Menu – ACM Systems



ACM: Access Control Management

Access Control Management refers to the process of managing access to resources, data, and systems within an organization. It is a core element of security that determines who is allowed to access certain data, apps, and resources and under what conditions.

Access management controls can typically be categorized into two main types – logical access and physical access controls. Logical access controls are the virtual type of access controls, such as system authentication configurations or applying role-based access control (RBAC) to restrict access to certain data within an organization's IT environment. Physical access controls relate to the restriction of access to the physical environment or tangible assets, such as an office building or data center facilities being restricted through the use of registered badges or keycards.

If employee is present and has done attendance machine punching then only he/she will be allowed to login in the system. Site Employees or Managers can login from their mobiles via internet also.

My Tools is the place where you can see your own profile, access rights and can request for more access rights or Assets.

Change Password: You can change your password to access ERP System anytime using this tool.

Logout: This refers to logout of system after you complete your work or while going home.

Organize Project Menu: Understanding your Menu – PMS Systems

PMS PROJECT MANAGEMENT SYSTEM

- 632/HRRL
- 0. Equipment Index
- 1. Costing Index
- 2. Planning Index
- 3. Delivery Index
- 4. Billing Index
- 5. Project Index
- 6. Material Index
- 640/LUPEC
- 637/ONGC
- 638/CPCL
- 624/OIL
- 643/GAIL
- 639/BAG

PMS: Project Management System menu

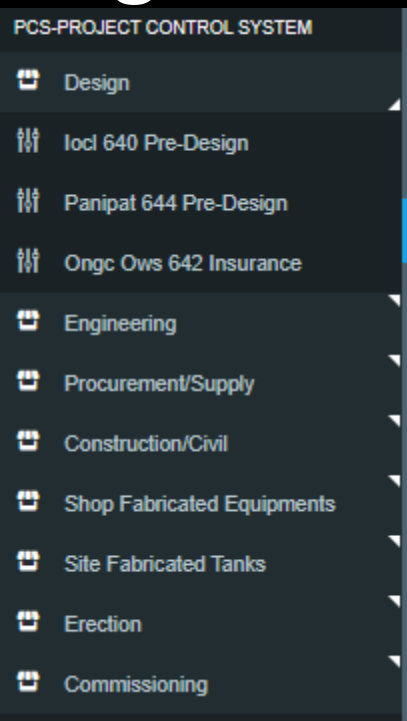
In the context of business, a project is a temporary endeavour undertaken to create a unique product, service, or result. Project management is the application of knowledge, skills, tools, and techniques to project activities to meet project requirements. Project management involves planning, executing, monitoring, and controlling project activities to achieve project goals and objectives. There are many project management methodologies and frameworks available, such as Agile, Scrum, Waterfall, PMI and PRINCE2. These methodologies provide a structured approach to project management and help teams deliver projects on time, within budget, and to the satisfaction of stakeholders. MobileERP Uses 6 Index Methodology for Project Management System as follows *(This menu is only available to Project Dept User):*

- Step 0. Equipment Index:** This step is executed at start of project. List of equipment's which will be delivered is first decided to initiate plan.
- Step 1: Costing Index:** Costing Index shows costs associated with project items, their rate analysis BOM, Profitability and Risks.
- Step 2: Planning Index:** Planning Index shows plan of project as per PERT/CPM, Kanban, Scrum, Waterfall, PMI Methodology.
- Step 3: Delivery Index:** Delivery Index shows items delivered to client. It also helps you create revision and task for items to be delivered.
- Step 4: Billing Index:** Billing Index shows bills prepared and pending bills etc. It also helps you create new RA Bills and Performa's.
- Step 5: Project Index:** Project Index shows entire projects data drill down from department to discipline to item and its process of delivery.
- Step 6: Material Index:** Inventory records of materials used for project is mentioned ProjectWise in this material index.

Apart from above Index based breakup of PMS. Here's how the six subsystems of your project management system look like:

- Facilitative organizational subsystem:** *Here Project delivery items breakdown as per BBU, Departments and Disciplines.*
- Project planning subsystem:** *Here managers meticulously craft a detailed plan and timeline. Dependencies are established.*
- Project control subsystem:** *It monitors the progress of the project with budgets & milestones and takes corrective actions.*
- Project MIS:** *This involves meetings. Exchanging updates, discussing roadblocks, and making decisions based on the shared info*
- Techniques and methodology:** *These are various tools and methods (like PERT, CPM, etc.) used to evaluate and make decisions.*
- Cultural ambiance subsystem:** *This is about how people within the organization feel and behave regarding project.*

Organize Project Menu: Understanding your Menu – PCS Systems



PCS: Project Control System menu *(This menu is only available to Project Dept User):*

Project Control Systems are measurement systems that assist in communication about the objectives, priorities, and outcomes in a project. They help define success, measure performance outcomes, and establish measures of success. Project controls are the actions you take as a project manager and the documentation you use to keep your projects on track. They are a set of tools that help you produce project deliverables successfully. Project controls are a set of tools, techniques, and processes that are used together to help project managers measure and control the six project constraints: time, cost, scope, quality, risk, and resources. They help project managers keep a project on schedule and within budget while meeting quality standards. Project controls can take many forms and are set up throughout the project life cycle. *A project control system aims to minimize the gap between project planning and project execution to achieve project aims, i.e., cost, time, and content.* MobileERP Uses Project Execution Departmental Methodology for Project Control System. Each Department will have its own start-up document and unique process based on project requirements. Under Each department you will see projects. A project user will be able to operate system from departmental point of view using this menu system. There are 11 Sub menus you can use to further control your project:

1. **Project Brief Summary:** This covers the who, what, when, why, how, and other essentials of project so you can build a solid foundation for execution.
2. **Project budget/cost estimate:** To determine whether your project is on or below budget, you need an original cost estimate to use as a baseline.
3. **Timeline, project plan, schedule, and/or Gantt chart:** A project plan, including a project schedule, is your most basic tool for controlling your projects.
4. **Statement of work:** Your statement of work contains a lot of information to help you set up controls for the rest of your project.
5. **RACI chart:** RACI is an acronym for responsible, accountable, consult, inform. Use RACI chart to assign roles and responsibilities for tasks and decision making.
6. **Communication plan:** A communication plan is a document that lists project stakeholders and defines communication channels by preference & priority level.
7. **Work breakdown structure:** It decomposes project scope into the discrete tasks required to fulfil project objectives and complete assigned deliverables.
8. **QA checklist:** A quality assurance (QA) checklist contains important items relating to project processes, testing methodology, or products.
9. **RAID log/risk register:** Stands for Risks, Actions, Issues and Dependencies. Use it to update it in regular meetings with the client's input
10. **Status report:** A status report ensures involved parties have a clear understanding of where the project is at.
11. **Change request:** A change request outlines and defines a change in scope that occurred in the project relative to the initial statement of work or cost estimate.