Proposal Management System

TATA CONSULTING ENGINEERS LIMITED

User Manual

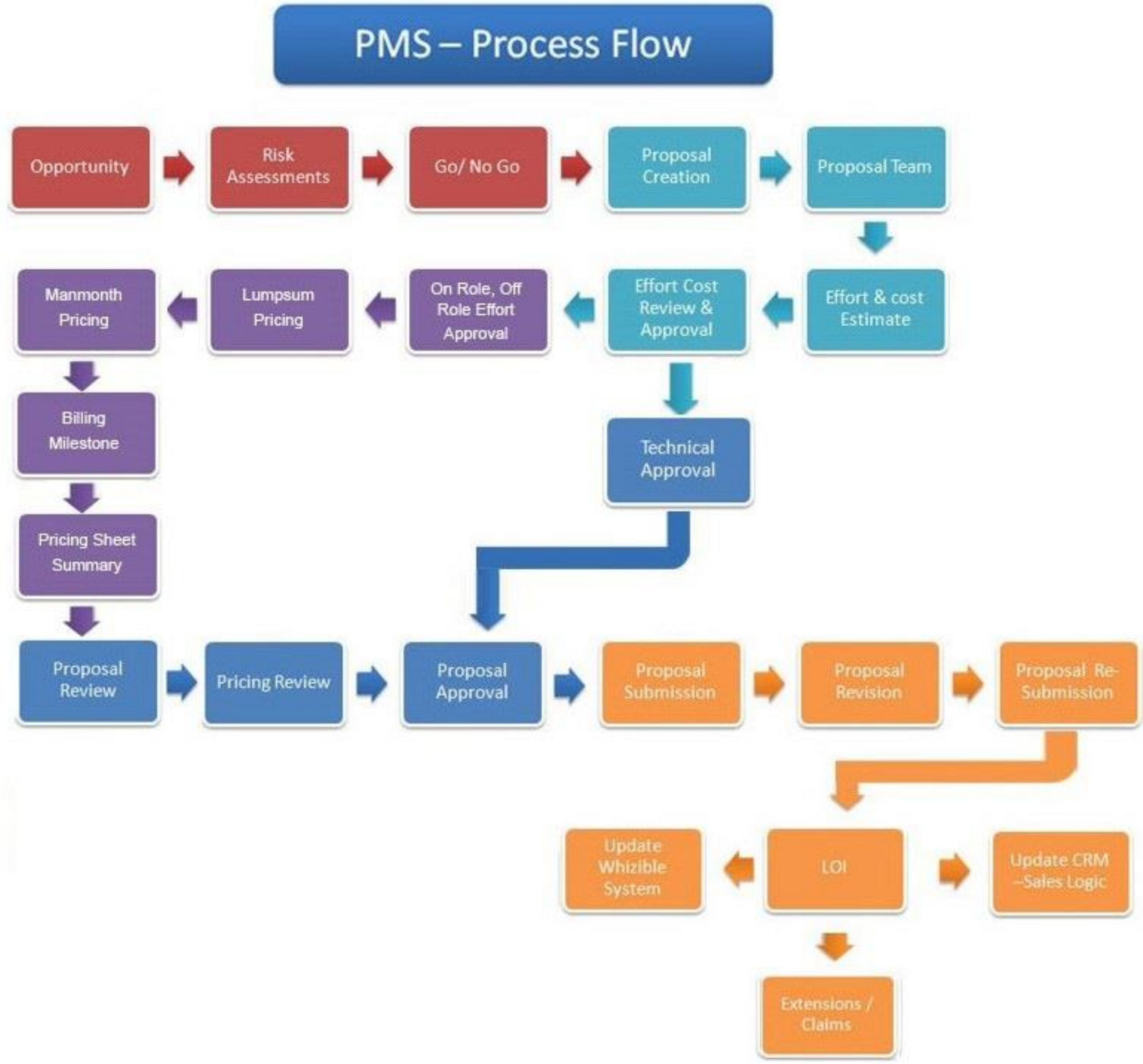
PMS Version 2.1

Table of Contents

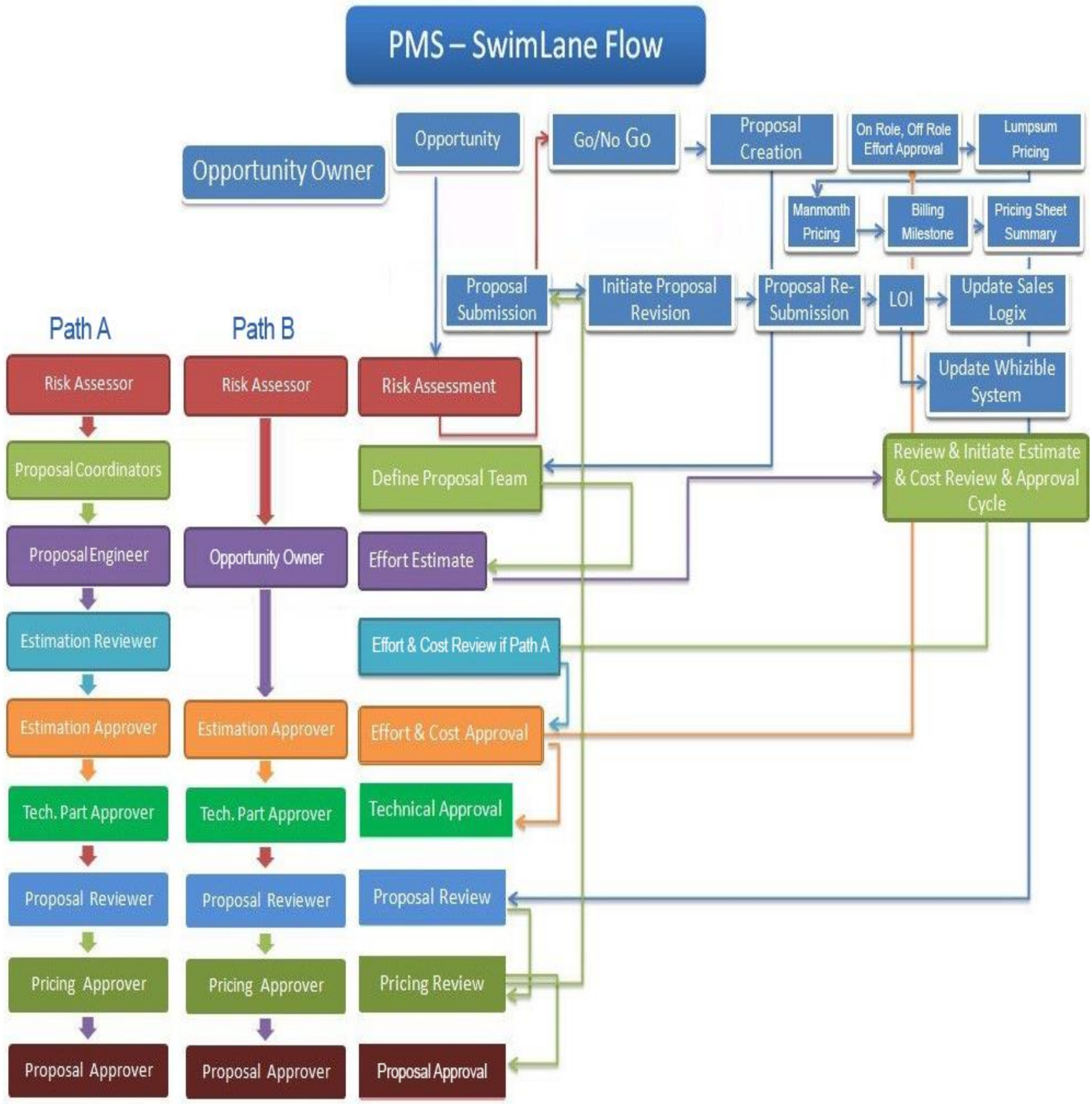
1. INTRODUCTION

Proposal Management Software is a project management tool for generating and managing business proposals. Using this software you can easily streamline your entire RFP responses and schedules. It allows you to create proposals in just a fraction of time. It also controls and manages your all RFPs and document in a centralized place. So, professionals can quickly create assignment, questions, date, and status and even upload the content with an ease.

1.1 PMS - Process Flow

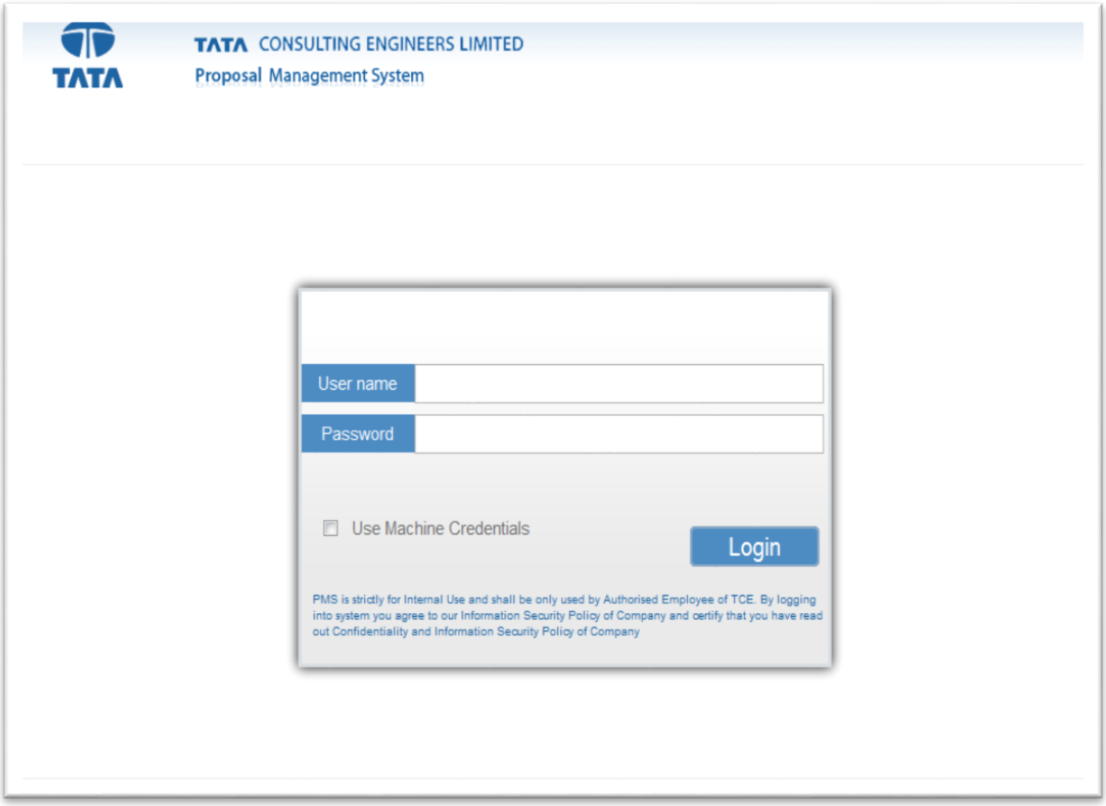


1.2 PMS – Swim Lane Flow



2 LOGIN INSTRUCTION

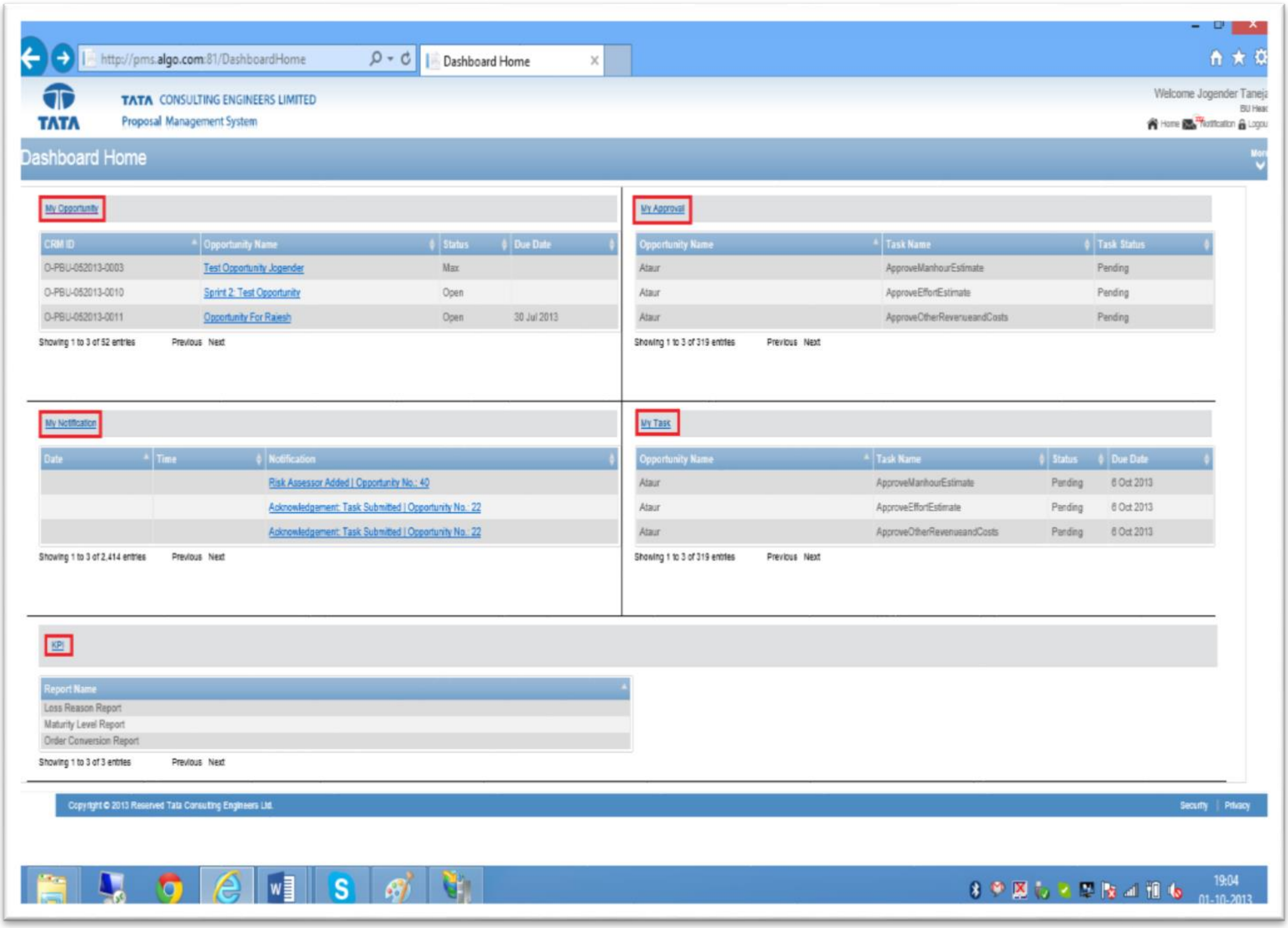
Open browser and switch to the assigned website URL given by administrator.



1. Enter your USER NAME and PASSWORD (given by administrator).
   TIPS: clicking on <u>Use Machine Credentials</u> checkbox, you can easily login with your system credential hitting just login button.
2. Click on <u>Login</u>.

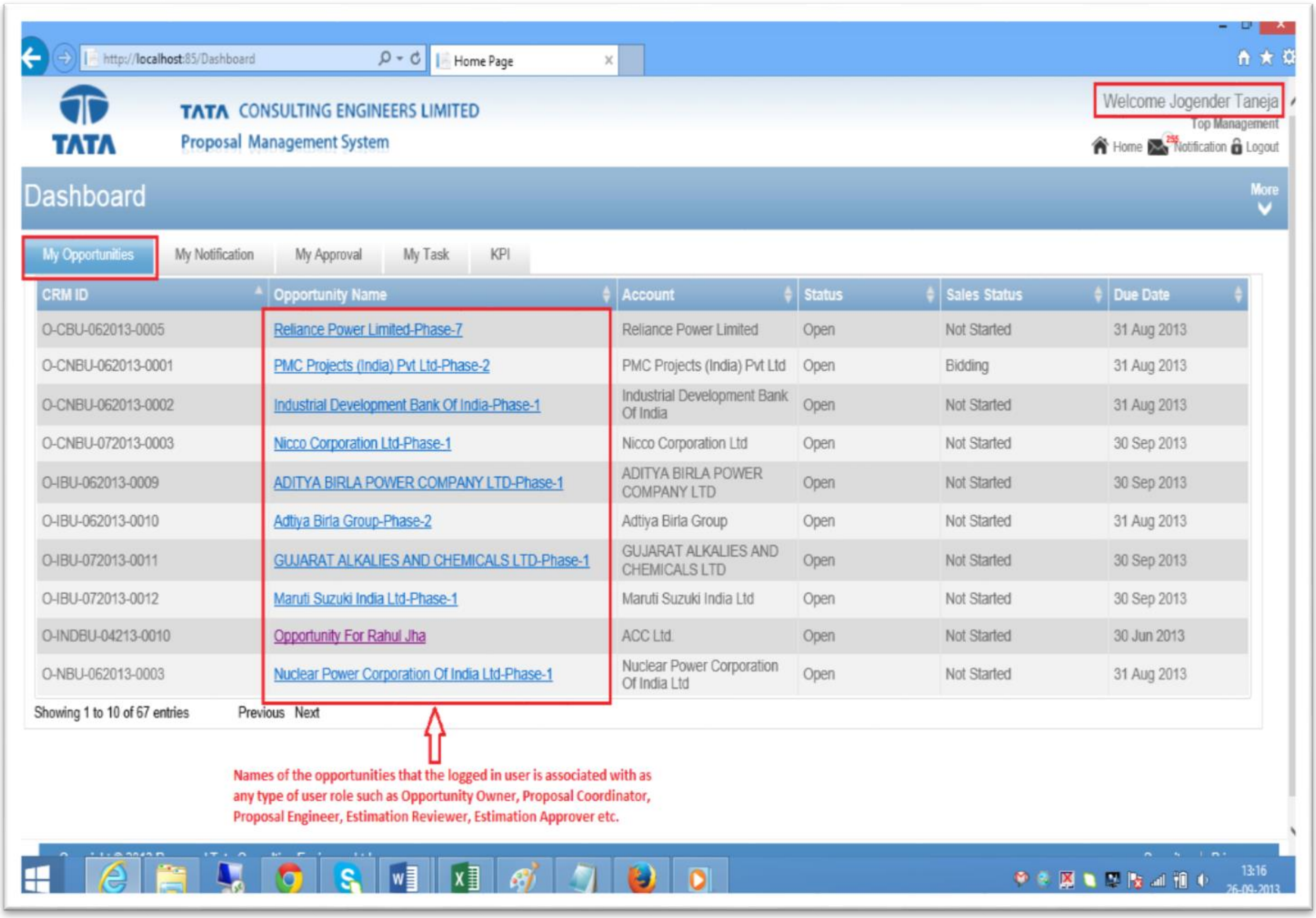
3 HOMEPAGE (DASHBOARD PAGE)

Clicking on Login button, you'll go to the dashboard page (Homepage). The Dashboard home page is divided into 5 sections namely "My Opportunity", "My Approval", "My Notification", "My task" and "KPI".



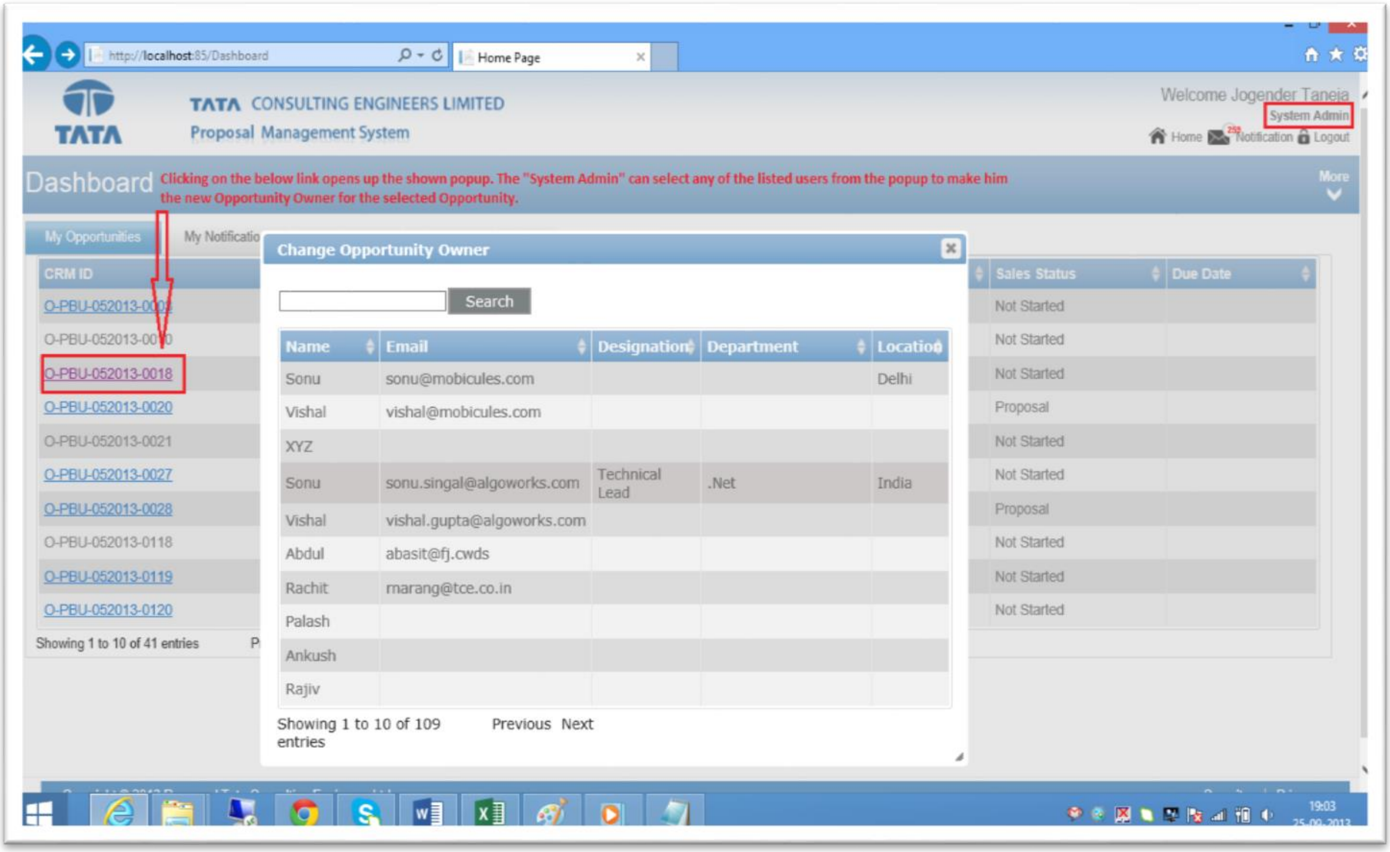
3.1 My Opportunity

On clicking the link "My Opportunity", the user is redirected on the page where he can find the list of all those pending opportunities that he is been associated with, as any type of User Role such as Opportunity Owner, Proposal Coordinator, Proposal Engineer, Estimation Reviewer, Estimation Approver etc.



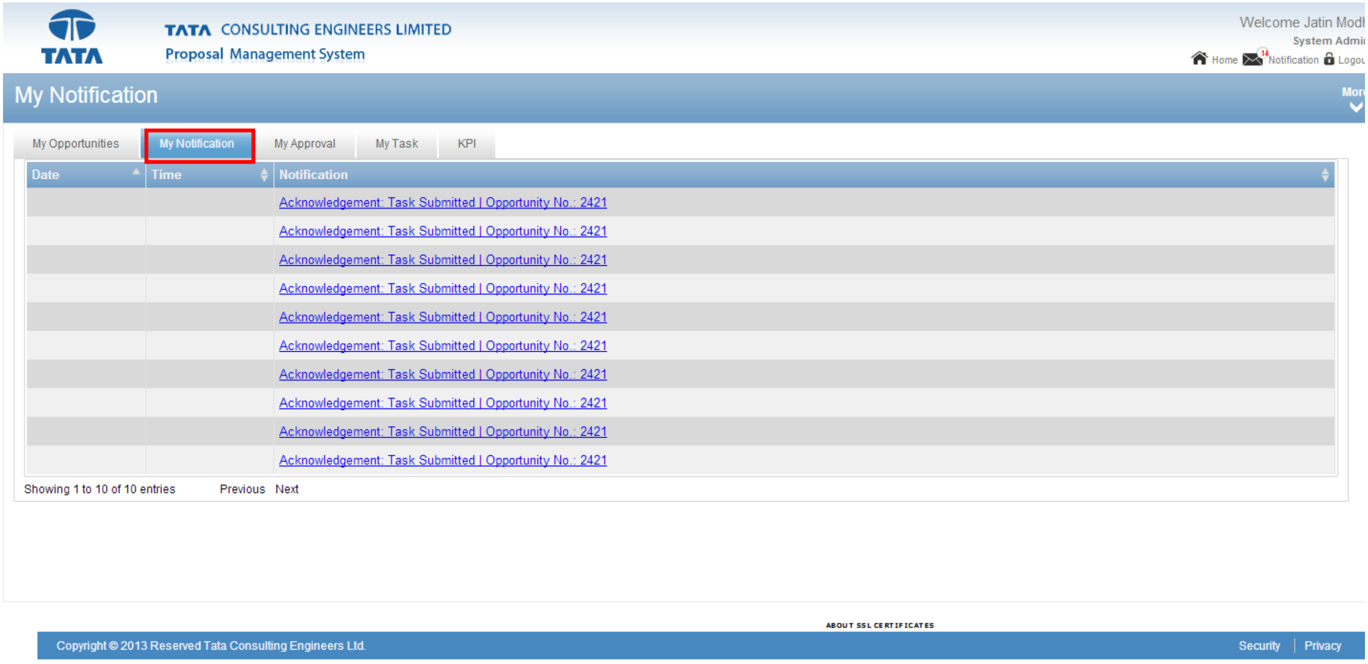
3.1.1 CRM ID

On clicking the CRM ID, the below popup screen appears. System Admin can use the links available under this column to change the Opportunity Owner for any Opportunity.



3.2 My Notification

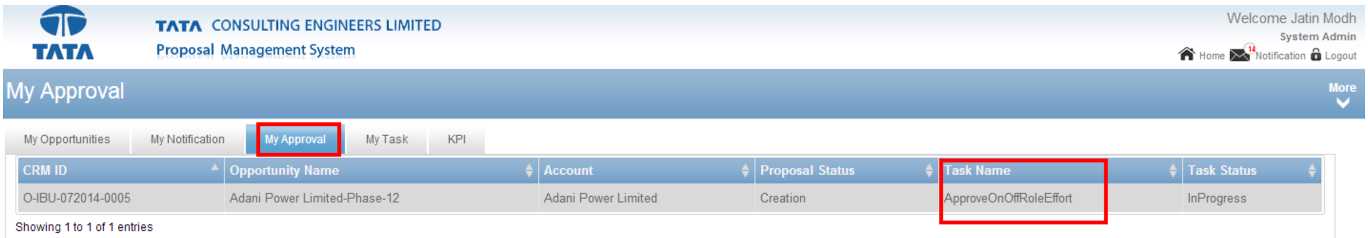
On clicking the "My Notification" link from the dashboard page, the user is redirected on a page where he can see recent 10 notifications related to the opportunities that he is associated with.



Clicking on any of the notification link, a popup appears describing the user about the notification in more details.

3.3 My Approval

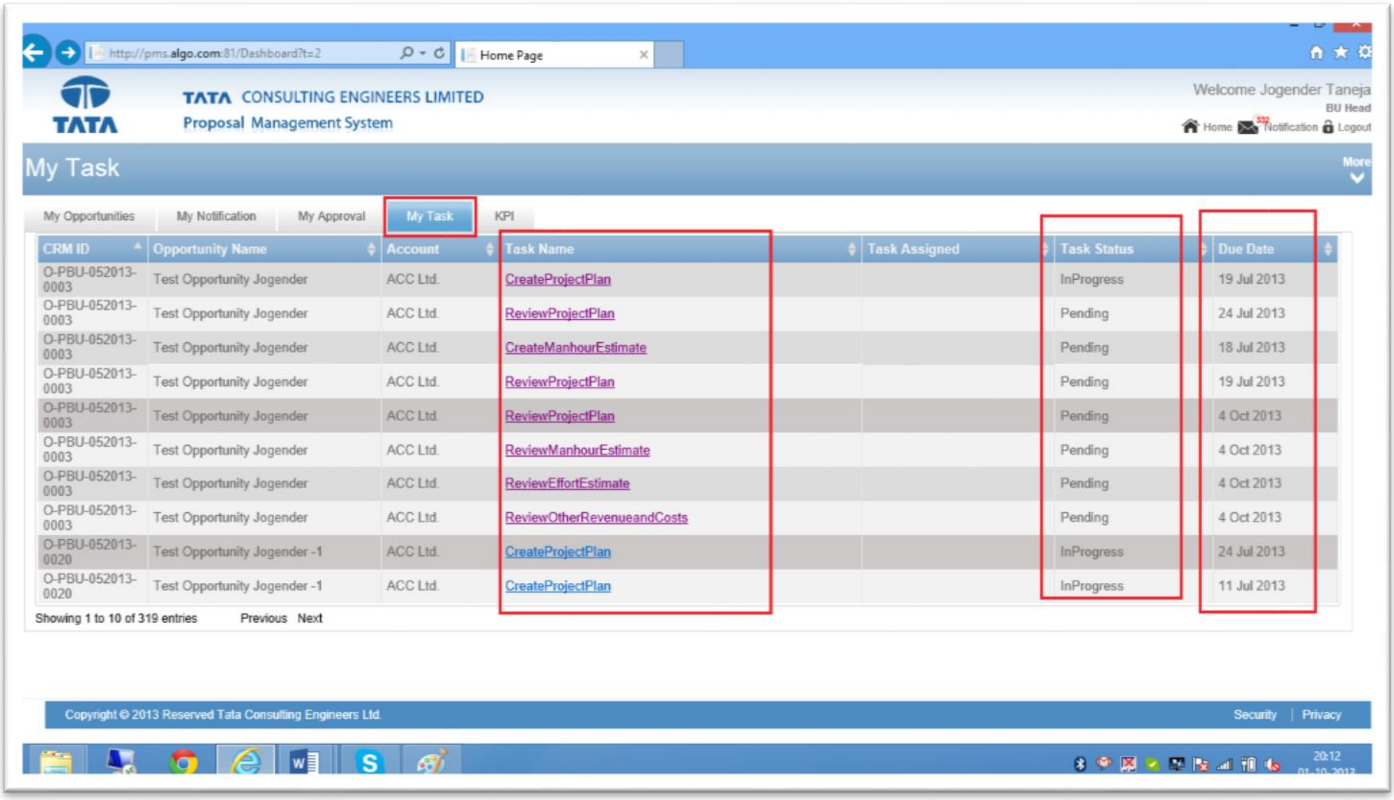
On clicking the "My Approval" link from the dashboard page, the user is redirected on a page where he can see all the inprogress approvals to be completed by him related to the opportunities that he is associated with.



Clicking on any of the approval link, the user is redirected on a page for the selected opportunity approval where he can see the approval done by him.

3.4 My Task

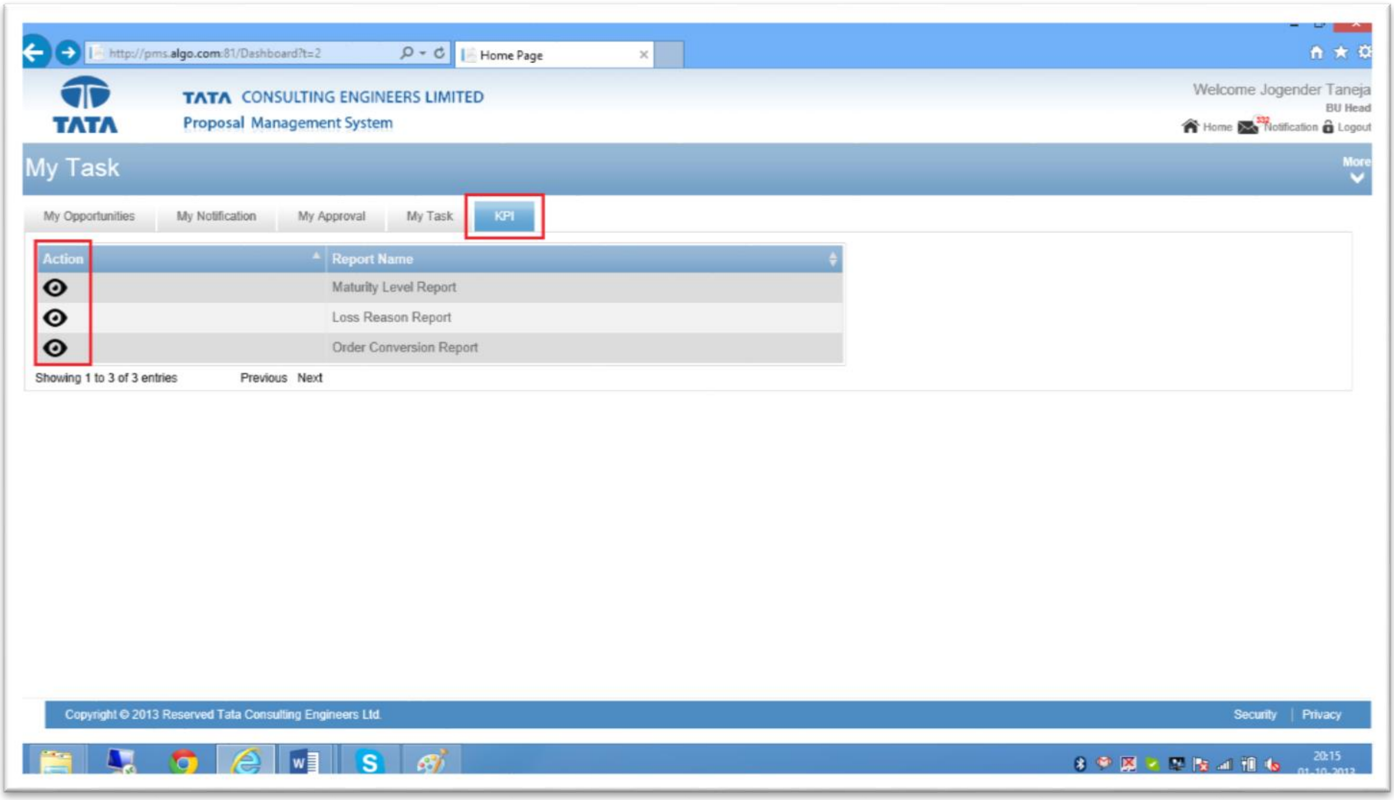
On clicking the "My Task" link from the dashboard page, the user is redirected on a page where he can see all the inprogress tasks to be completed by him along with the task status and the due date for the task related to the opportunities that he is associated with.



Clicking on any of the task link, the user is redirected on a page for the selected opportunity where he can see task to be completed by him.

3.5 KPI

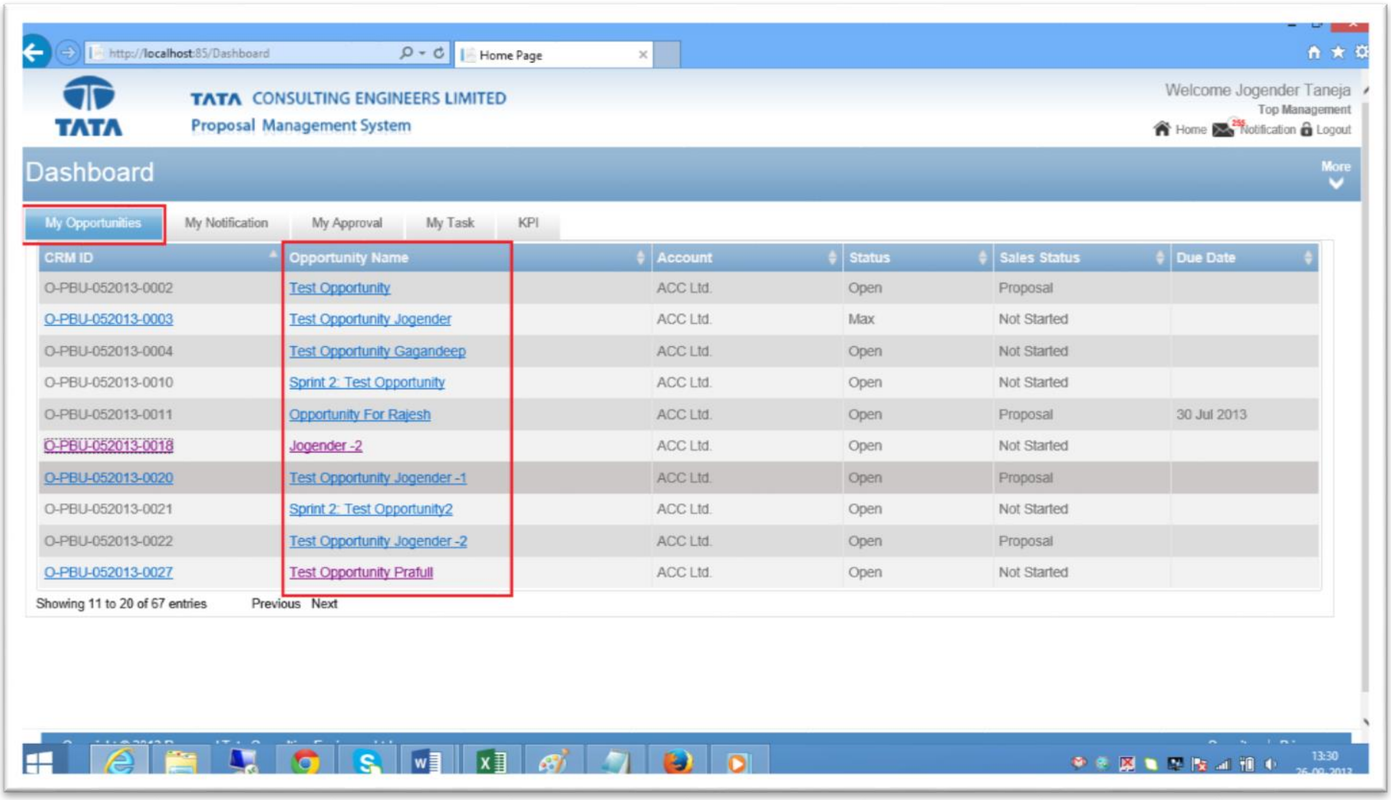
On clicking the "KPI" link from the dashboard page, the user is redirected on a page where he can see a list of all the reports related to the application like "Maturity Level Report", "Loss Reason Report", "Order Conversion Report" etc according to the permissions set for that particular role given to the user.



On clicking the view icon under the column "Action", the user can see the detailed report for the selected view.

4 APPLICATION ENTRY POINT

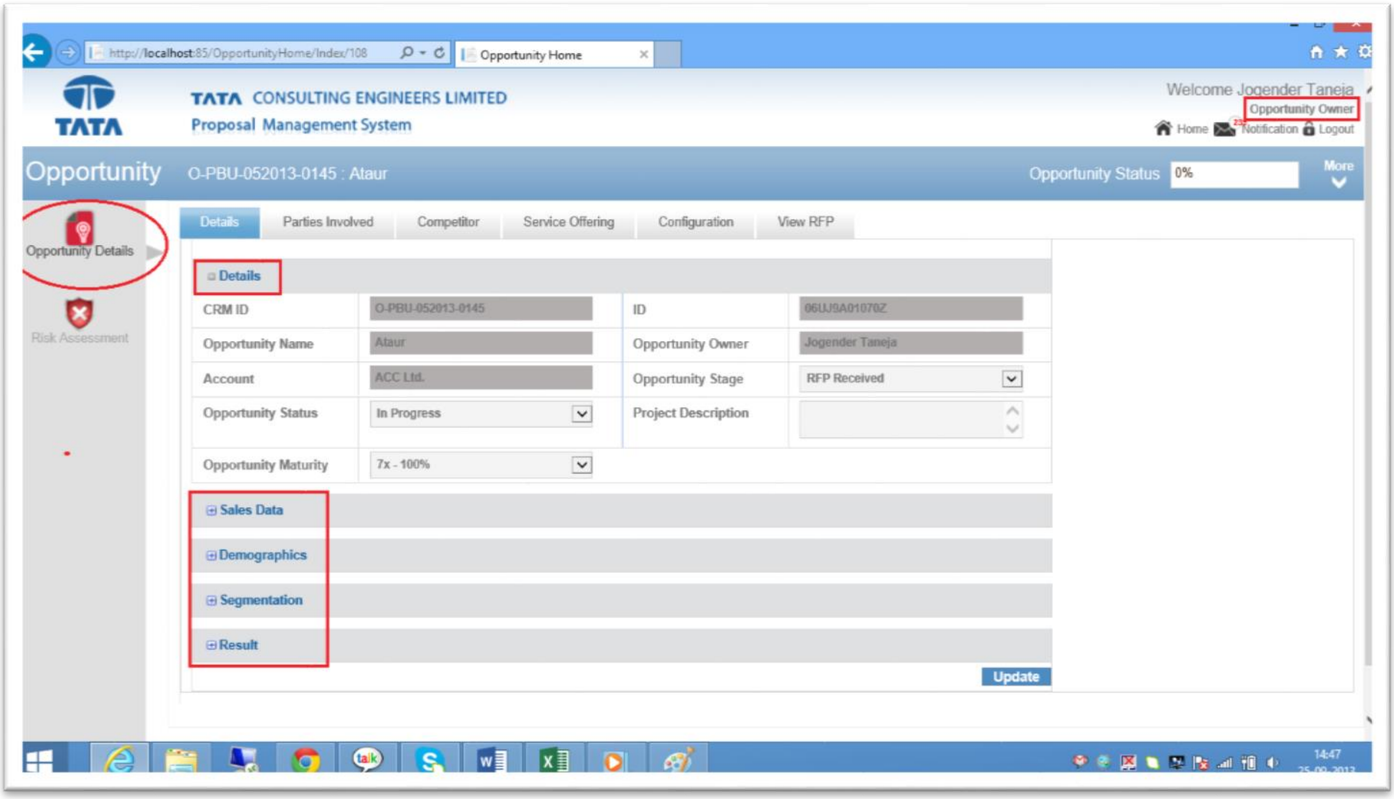
Clicking on the "Opportunity Name" for any Opportunity from the dashboard page takes the user on the screen associated with the user role for that opportunity. For example, if the user is the opportunity owner for the opportunity, he will be redirected on the opportunity details page and if he is associated with the opportunity as a "Risk Assessor", he will be redirected on the "Risk Assessment" screen and the other screens of the opportunity will work according to the permissions set for that particular role given to the user for that particular opportunity.



5 STAGE 1: OPPORTUNITY DETAILS

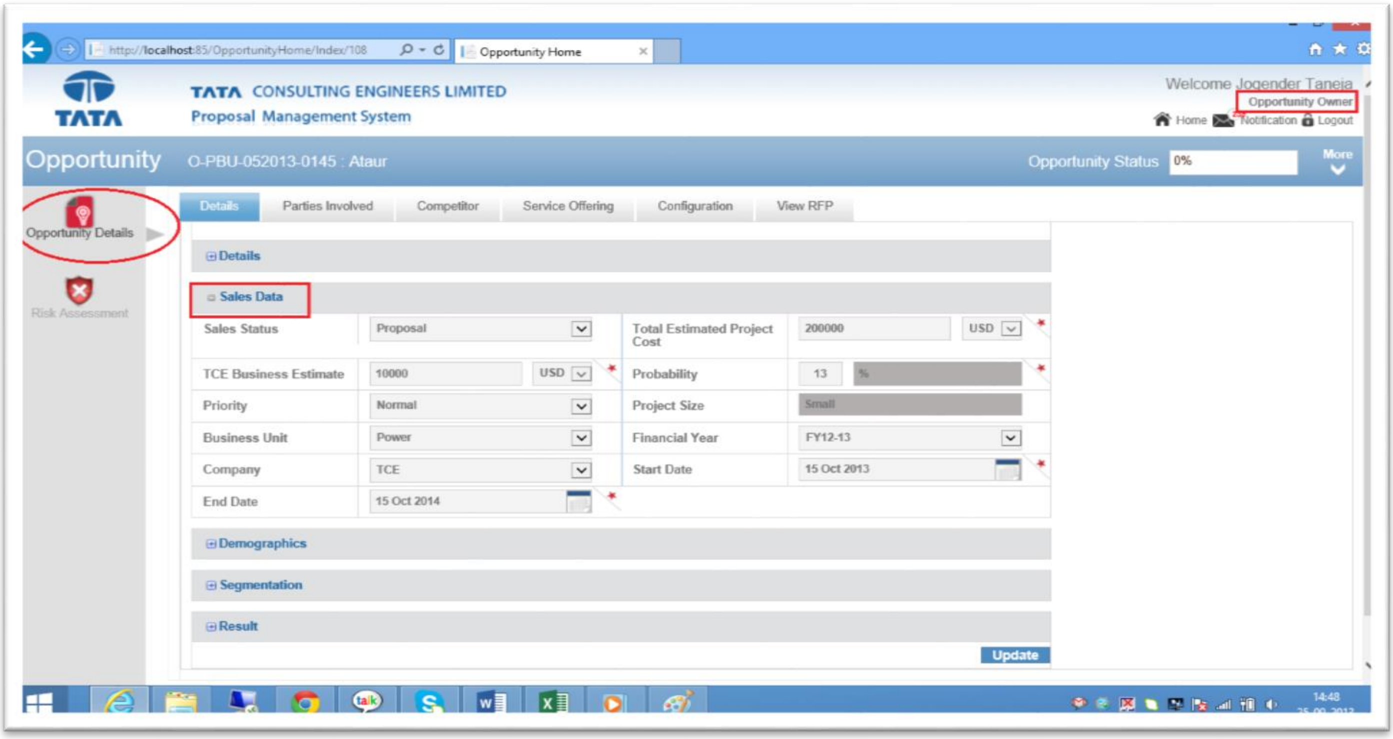
5.1 Details

Opportunity Owner can add/update the values for the Opportunity through this screen under the sections "Details", "Sales Data", "Demographics", "Segmentation" and "Result".



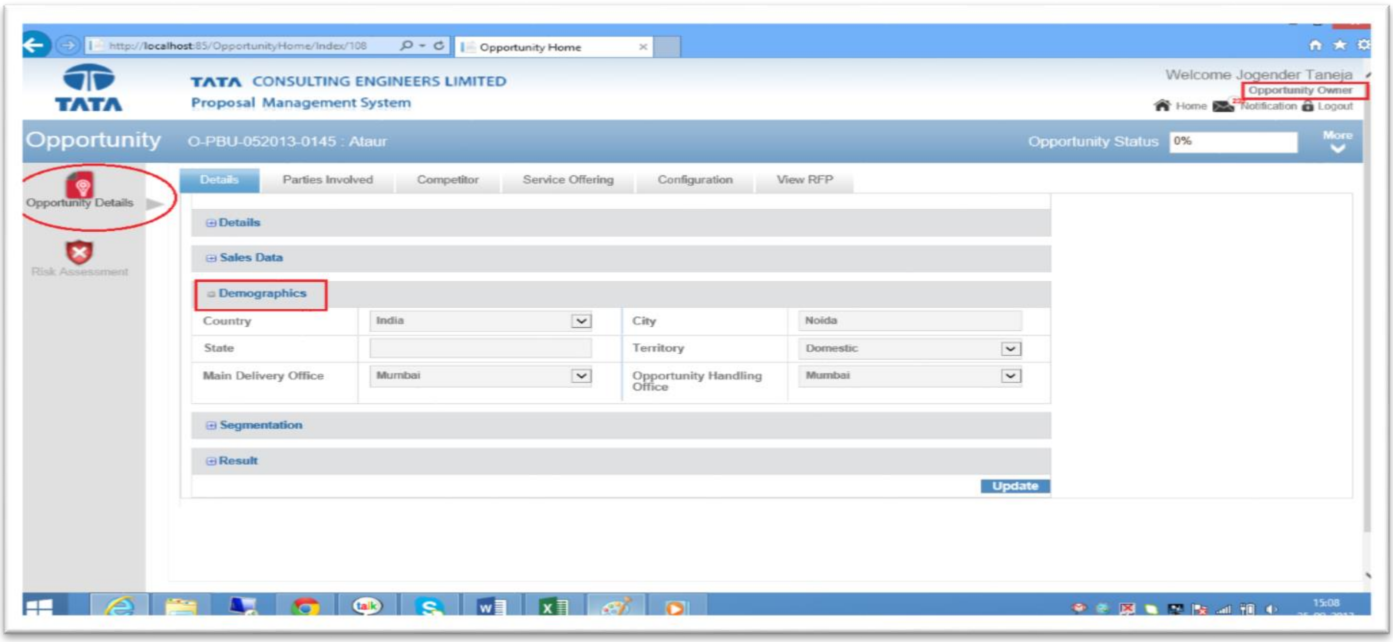
5.1.1 Sales Data

In the Sales Data option, opportunity owner can edit/update the fields like Sales Status, Total Project Cost, TCE Business Estimate, Probability, Priority, Project Size, Business Unit, Financial Year, Company Name, Start Date and End Date of the Opportunity.



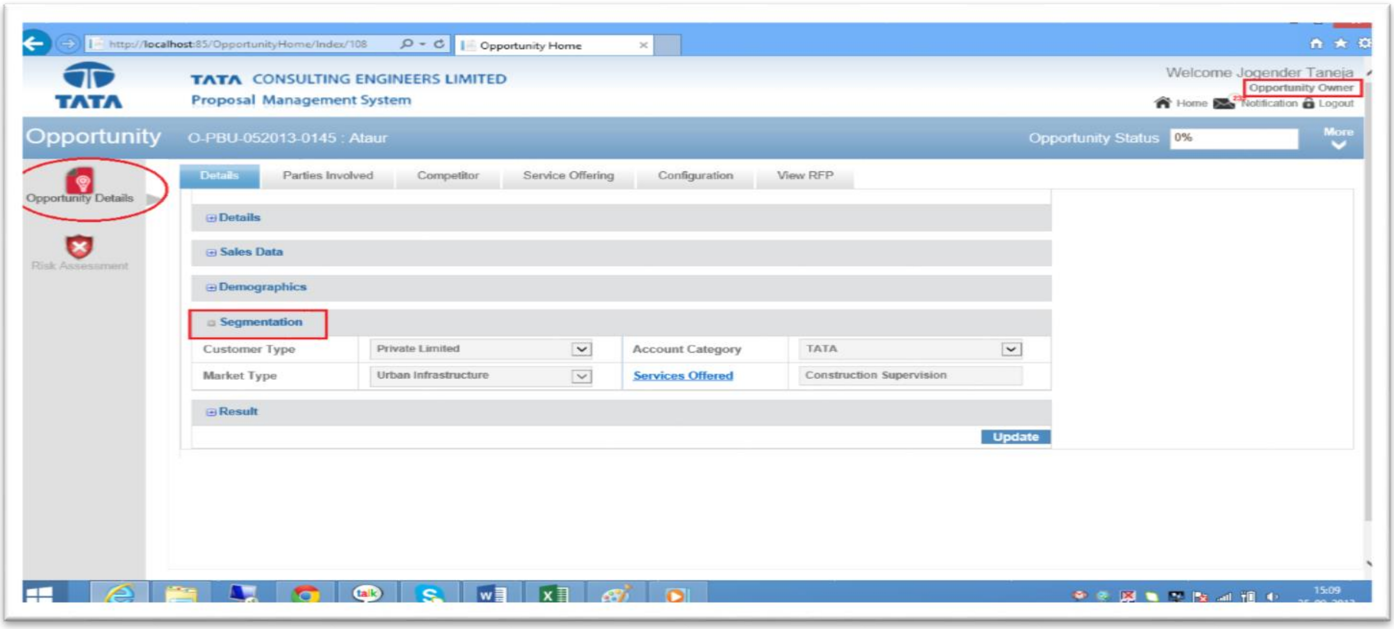
5.1.2 Demographics

Through the Demographics tab, opportunity owner can set the values for the fields like Country, City, State, Territory, Main Delivery Office and Opportunity Handling Office.



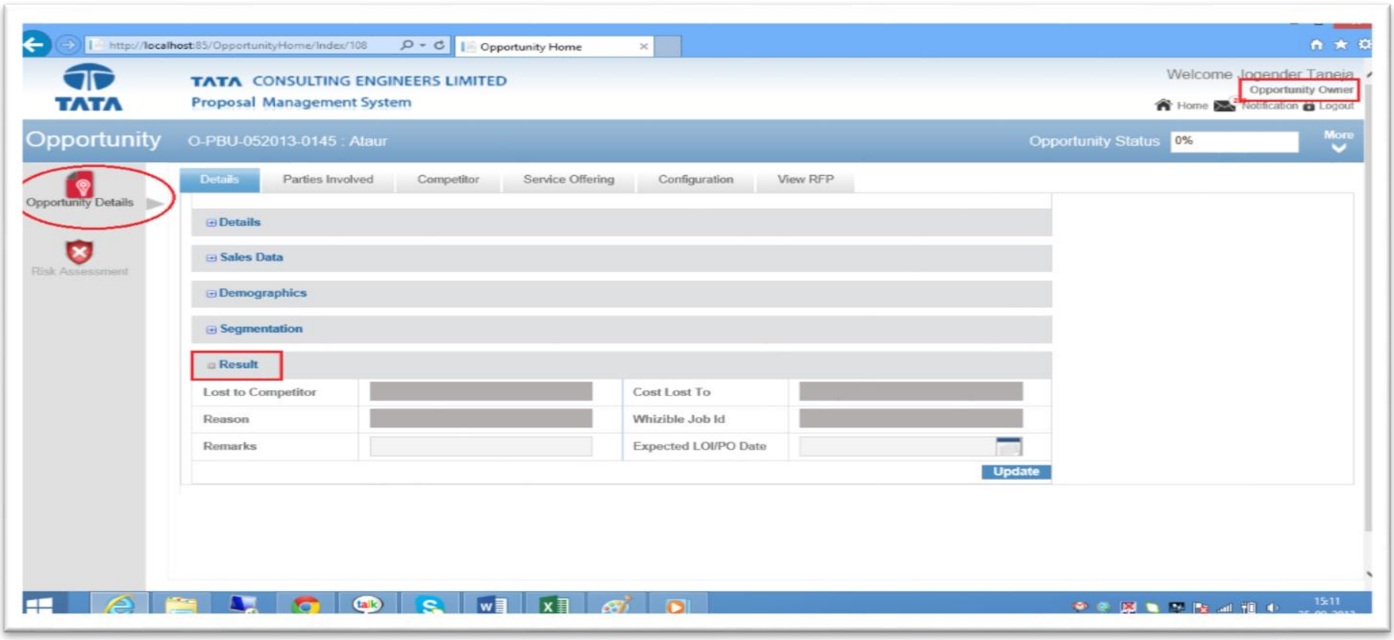
5.1.3 Segmentation

In the Segmentation tab, opportunity owner can set up the values for Customer Type, Market Type and Services Offered.

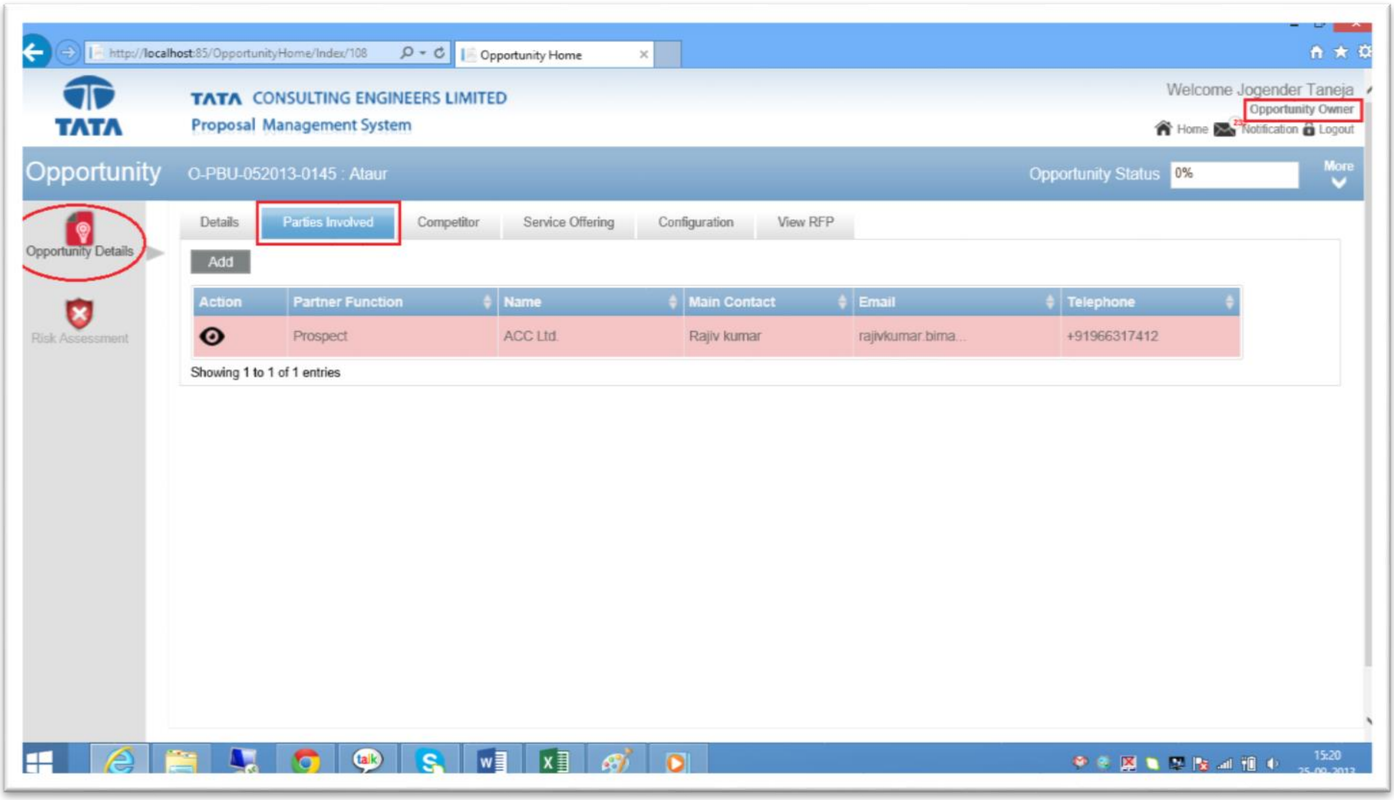


5.1.4 Result

Through this tab, the opportunity owner can view the opportunity results like Lost to Competitors, Cost Lost to, Reason, Whizible Job id and set the Remarks.



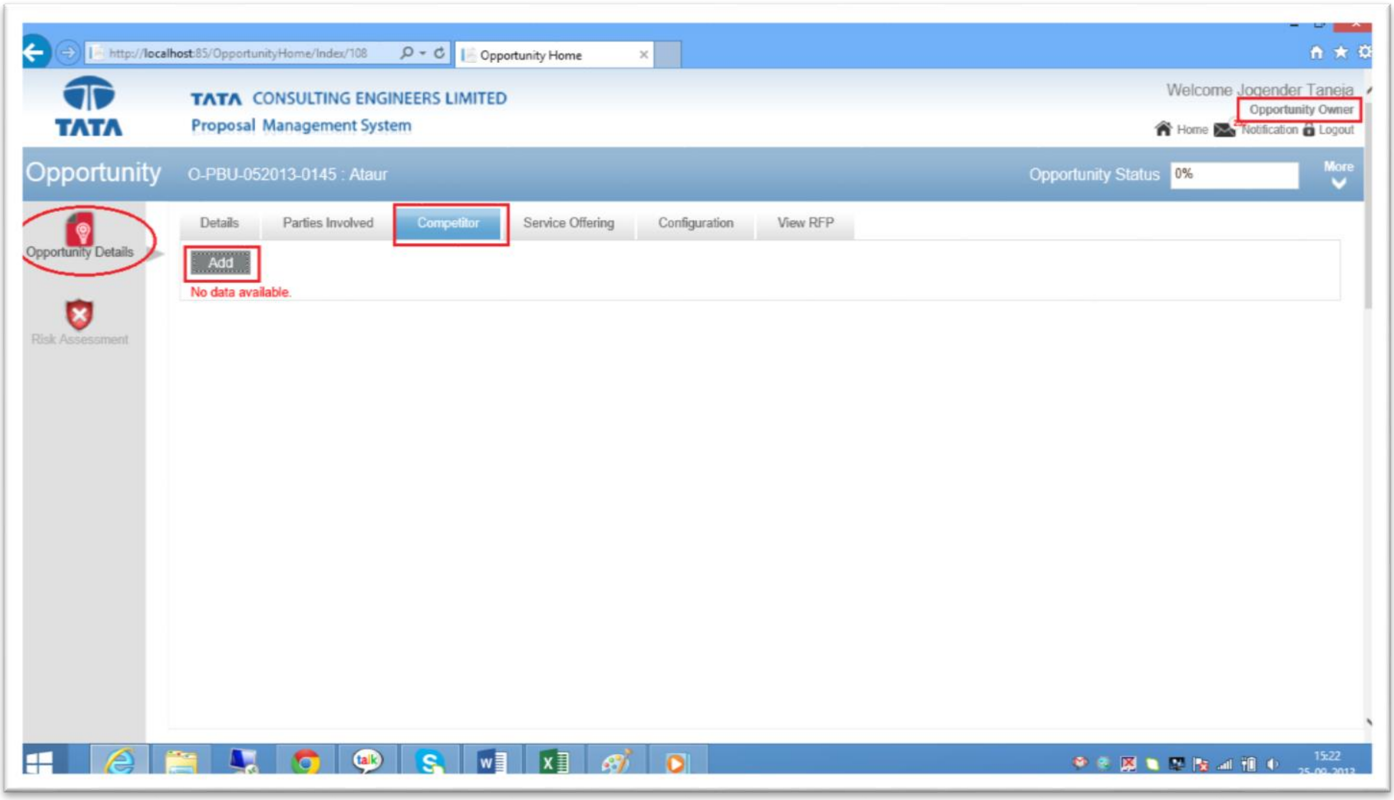
5.2 Parties Involved

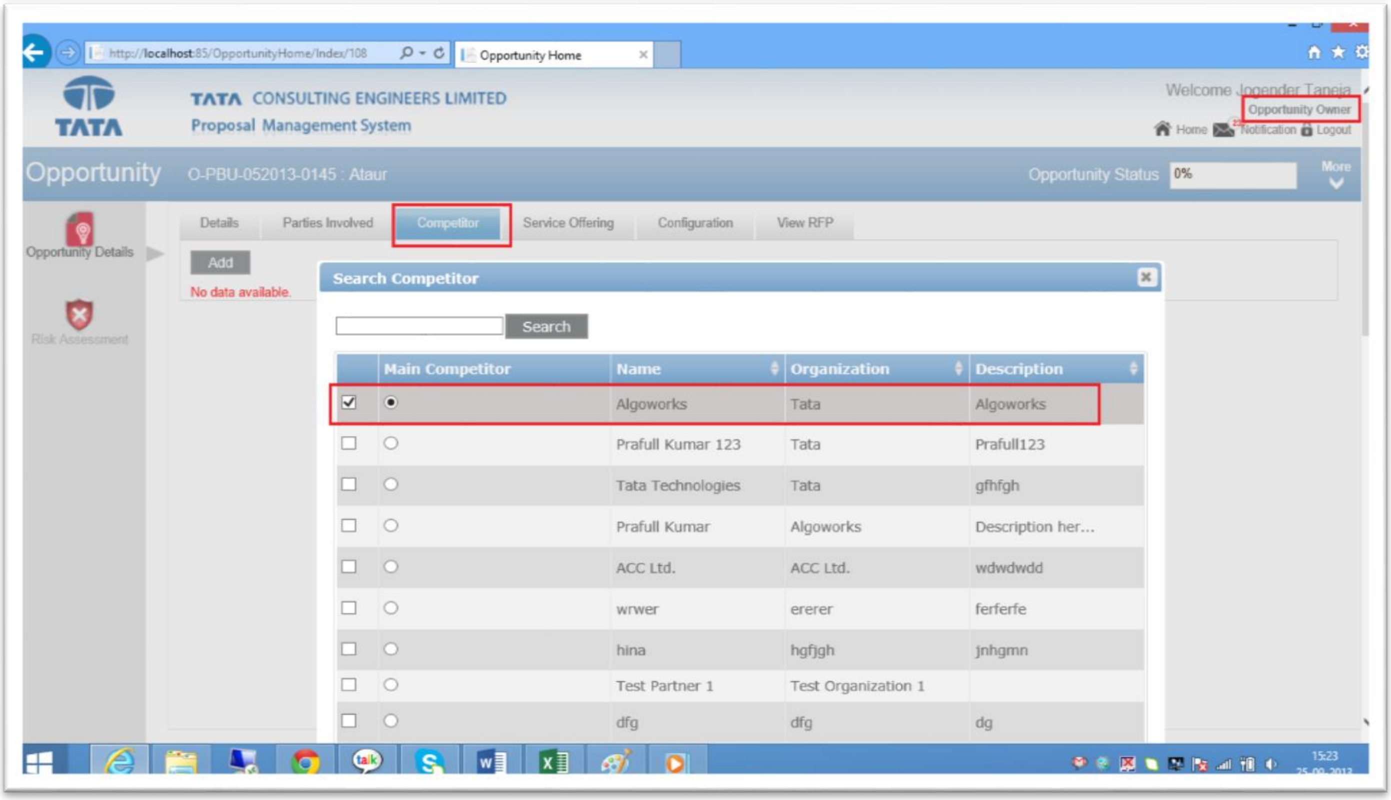


This is screen through which the opportunity owner can search for the opportunity "Partners" with different functions and can add them to the opportunity. The highlighted row in pink colour on this screen shows the details of the "Client" for the opportunity.

5.3 Competitor

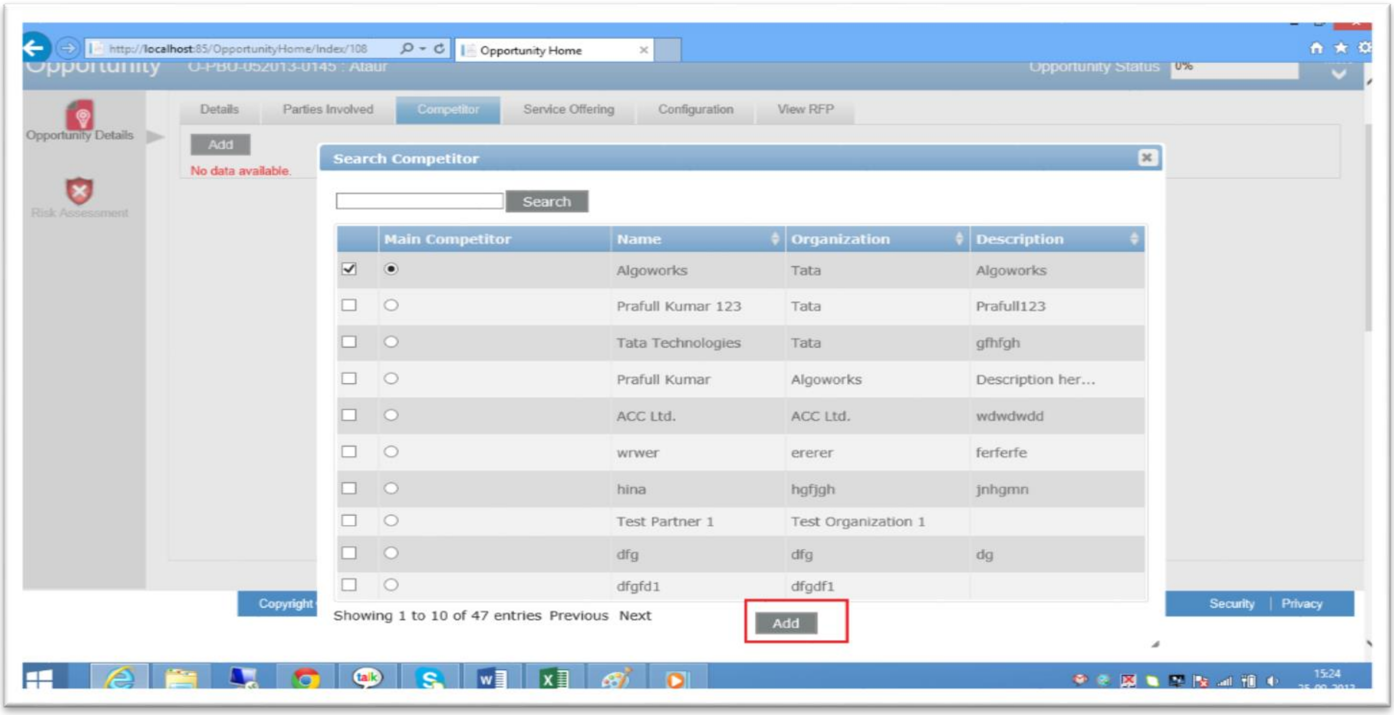
This is screen through which the opportunity owner can search for the opportunity "Competitor" and can add them to the opportunity.



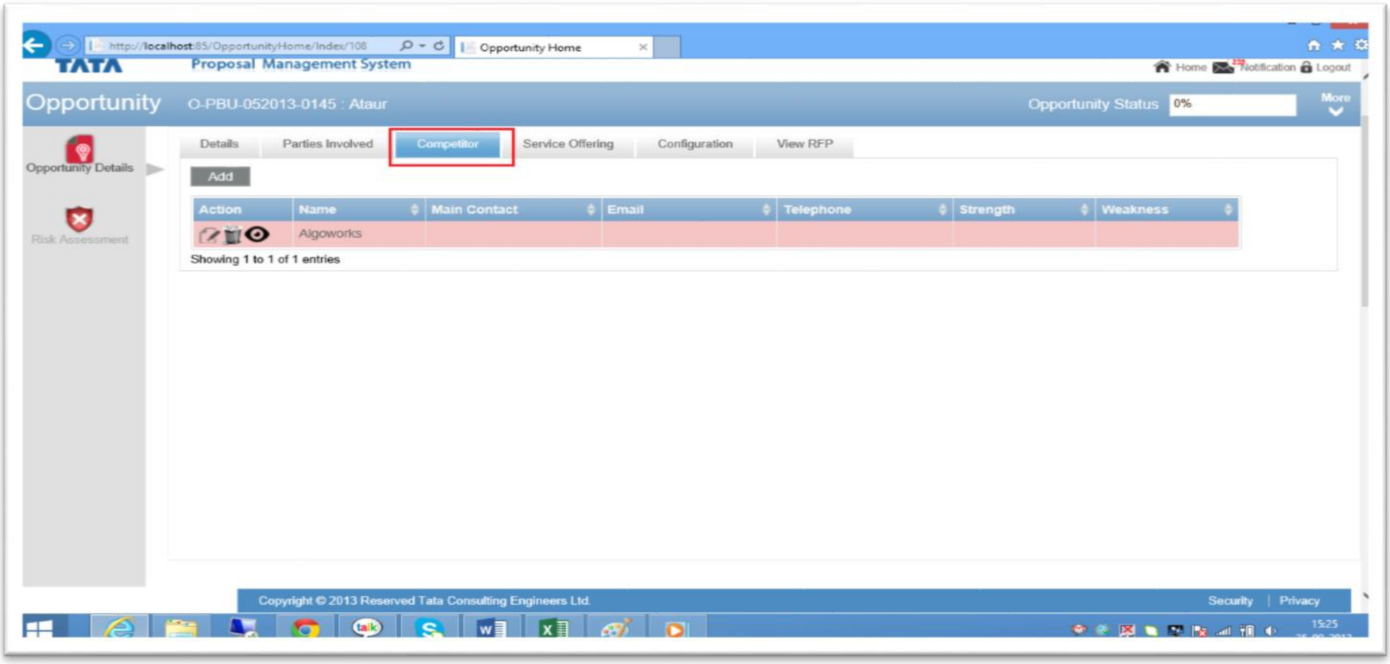


Identify Main Competitor

He can also make the "Main Competitor" by clicking on radio button corresponding to the particular Competitor name for the opportunity.



The highlighted row in pink colour on the below screen displays the record of the "Main Competitor" for the opportunity.

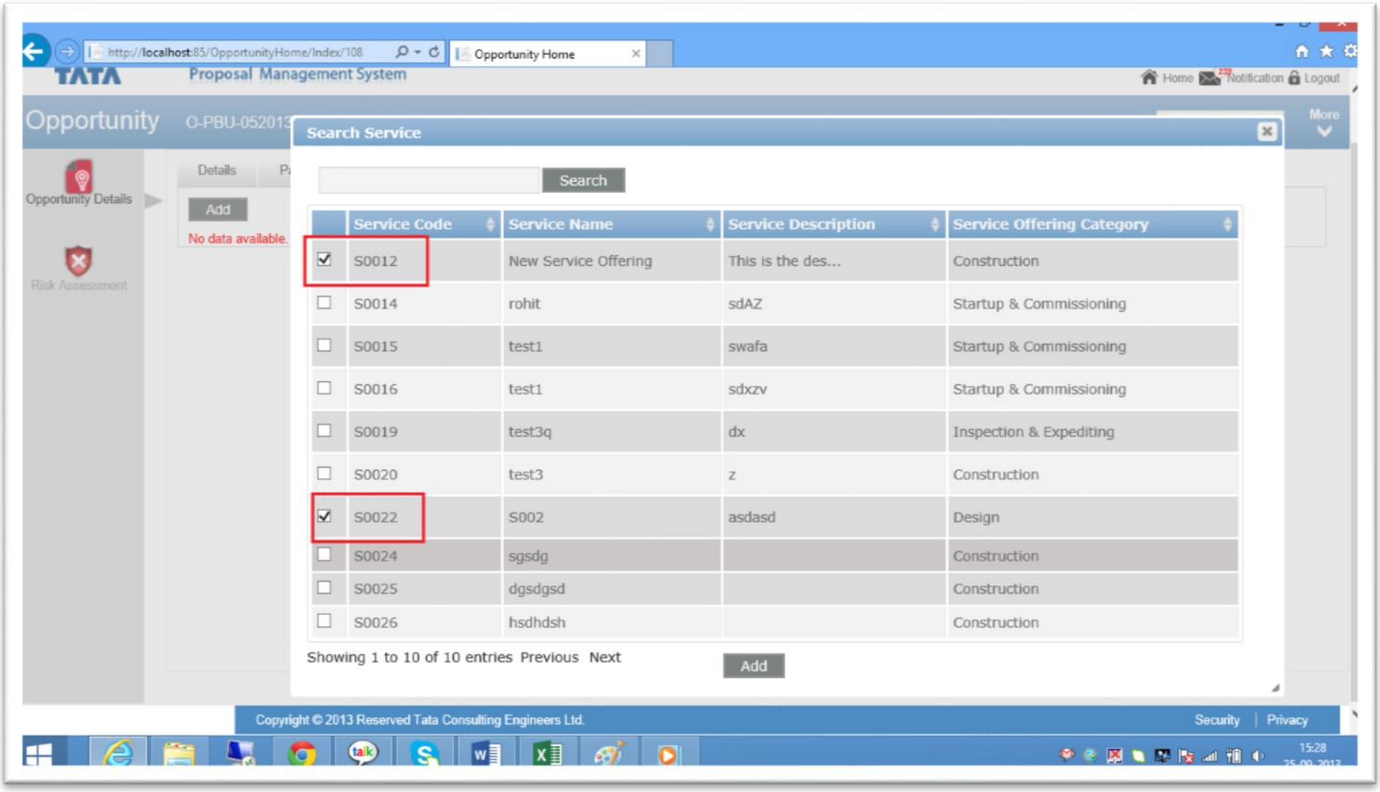


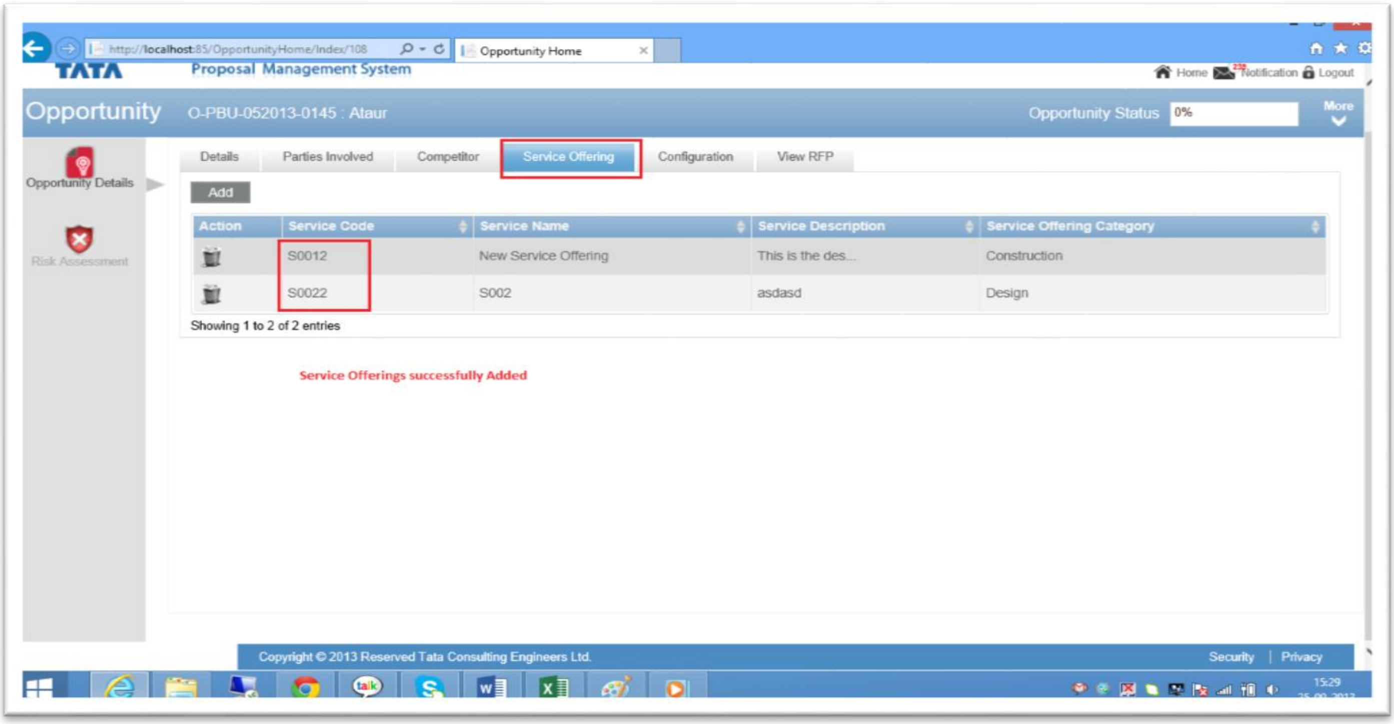
5.4 Service Offering

Through this screen, the opportunity owner can add the services offered with respect to the different service categories by the opportunity.

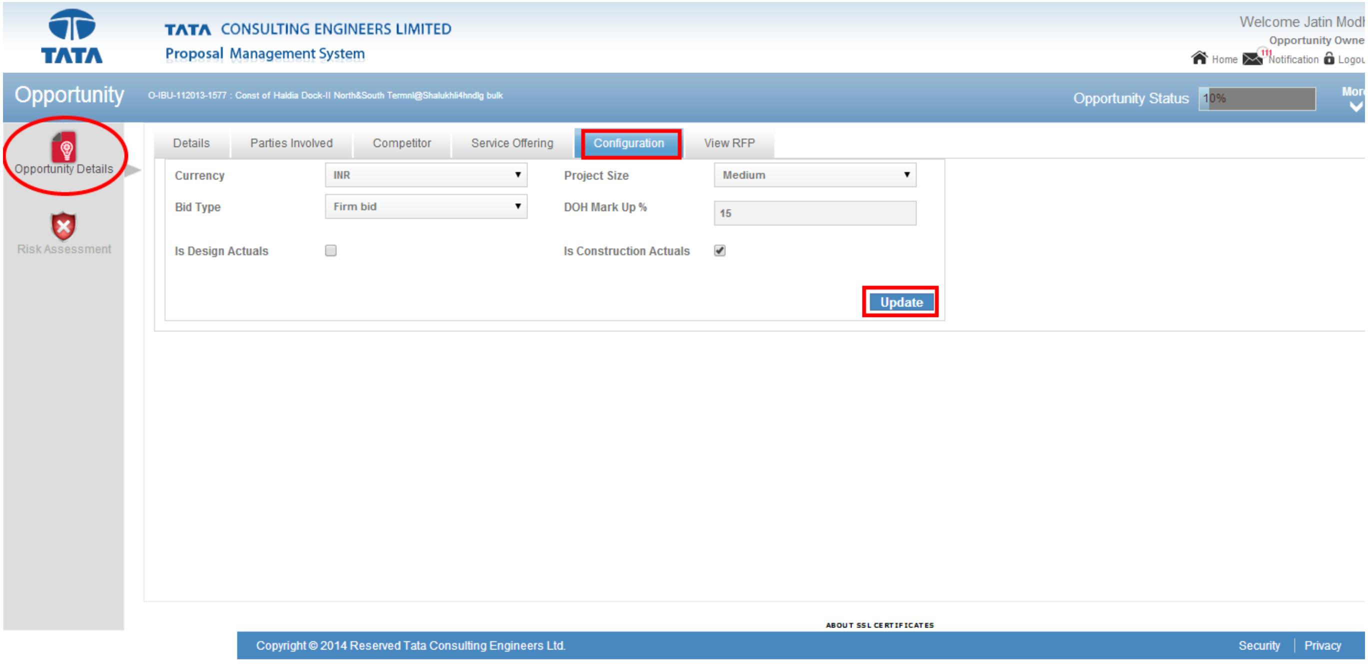
Add Service Offerings for the Opportunity:

Click on "Add" button under "Service Offering" tab, search service pop up opens, click on search button and select the services to be added in the Service Offering table and click on Add button in the opened pop up, new service will be successfully added to the opportunity.


Proposal Management System
Opportunity
Search Service
Search
Service Code
Service Name
Service Description
Service Offering Category
S0012 New Service Offering This is the des... Construction
S0014 rohit sdAZ Startup & Commissioning
S0015 test1 swafa Startup & Commissioning
S0016 test1 sdxzv Startup & Commissioning
S0019 test3q dx Inspection & Expediting
S0020 test3 z Construction
S0022 S002 asdasd Design
S0024 sgsdg Construction
S0025 dgsdgsd Construction
S0026 hsdhdsh Construction
Showing 1 to 10 of 10 entries Previous Next
Add
Copyright © 2013 Reserved Tata Consulting Engineers Ltd.
Security | Privacy


Proposal Management System
Opportunity
O-PBU-052013-0145 : Ataur
Opportunity Status
Details
Parties Involved
Competitor
Service Offering
Configuration
View RFP
Add
Action
Service Code
Service Name
Service Description
Service Offering Category
S0012 New Service Offering This is the des... Construction
S0022 S002 asdasd Design
Showing 1 to 2 of 2 entries
Service Offerings successfully Added
Copyright © 2013 Reserved Tata Consulting Engineers Ltd.
Security | Privacy

5.5 Configuration



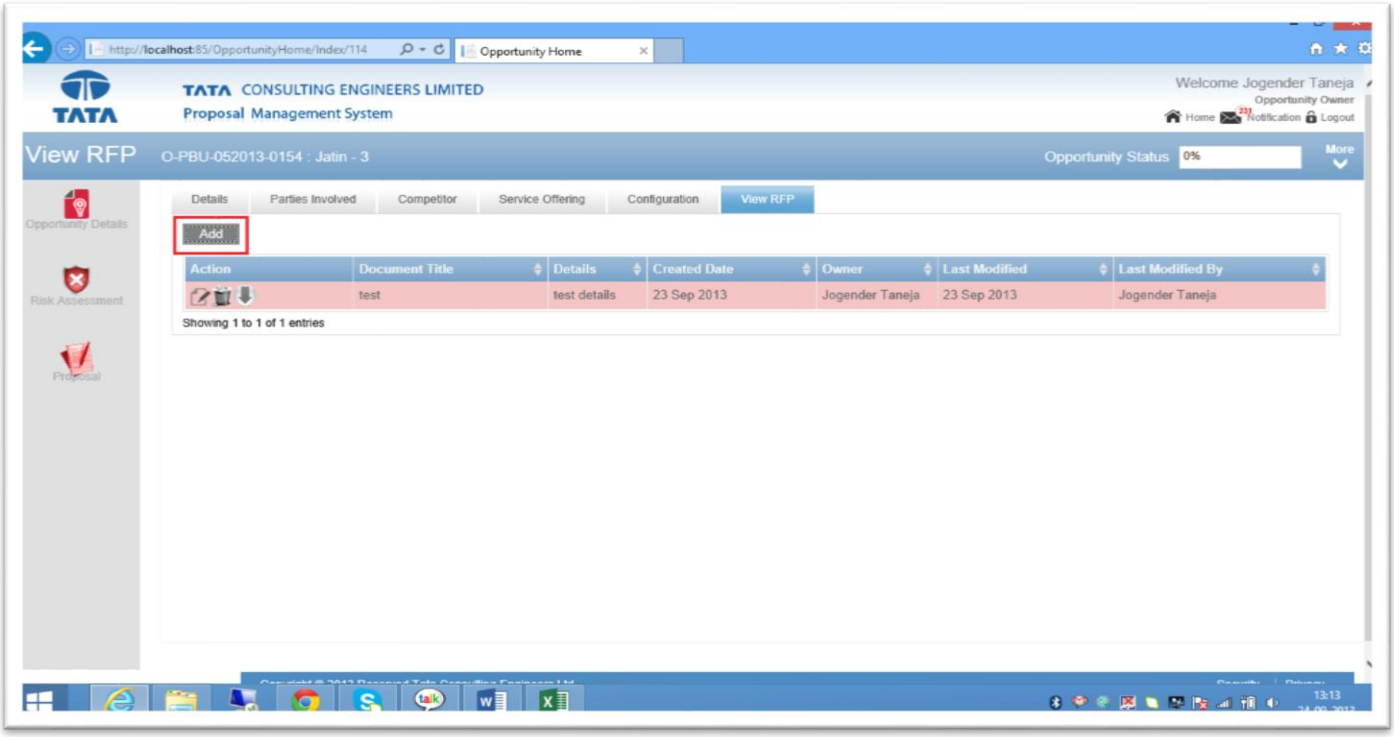
This screen is used to set up different configurations like "Currency", "Bid Type". "Project Size", "DOH Mark Up %" and "service Offered" for the opportunity.

5.6 View RFP

Opportunity Owner has the privilege to upload the RFP document related to any particular opportunity.

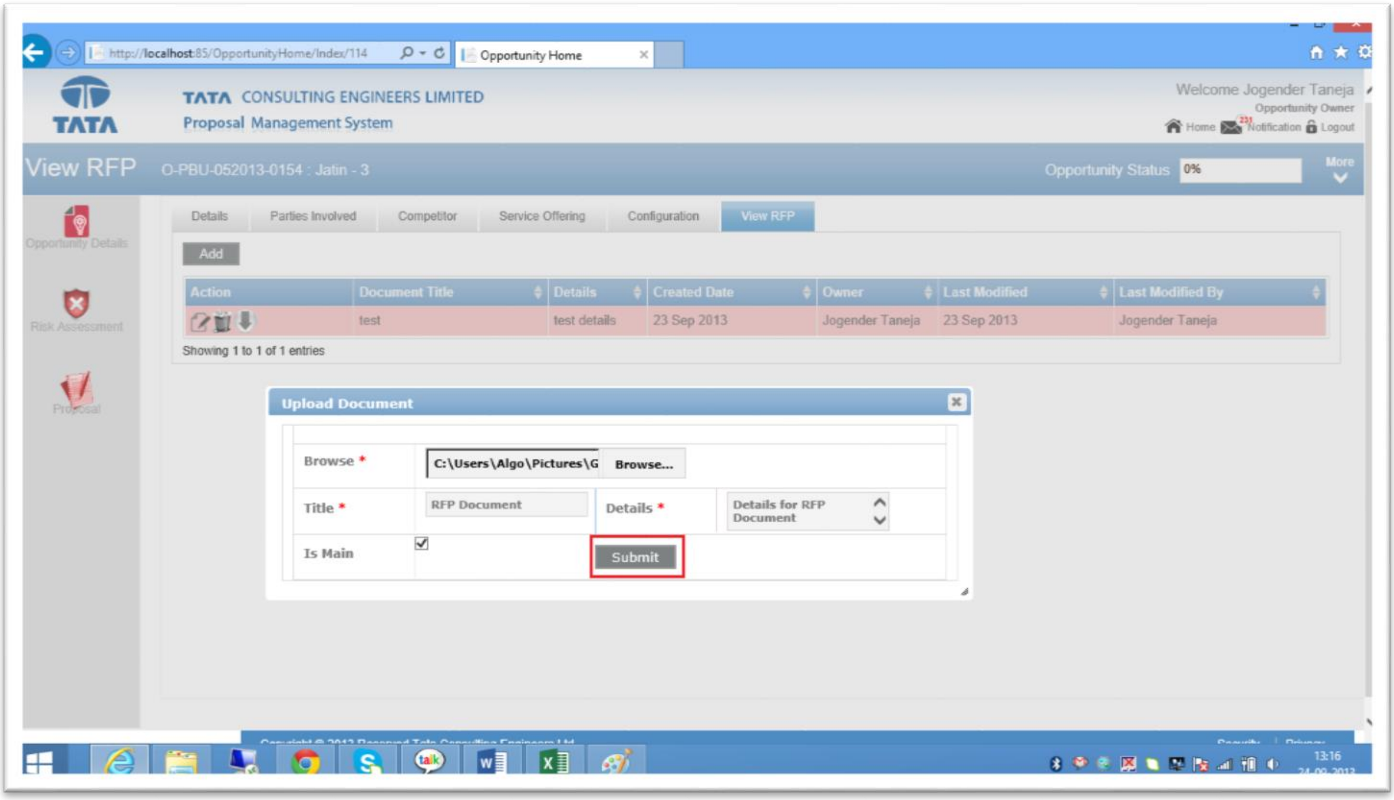
Steps to upload RFP Document:

Step 1: Login as Opportunity Owner and click on the "Add" button



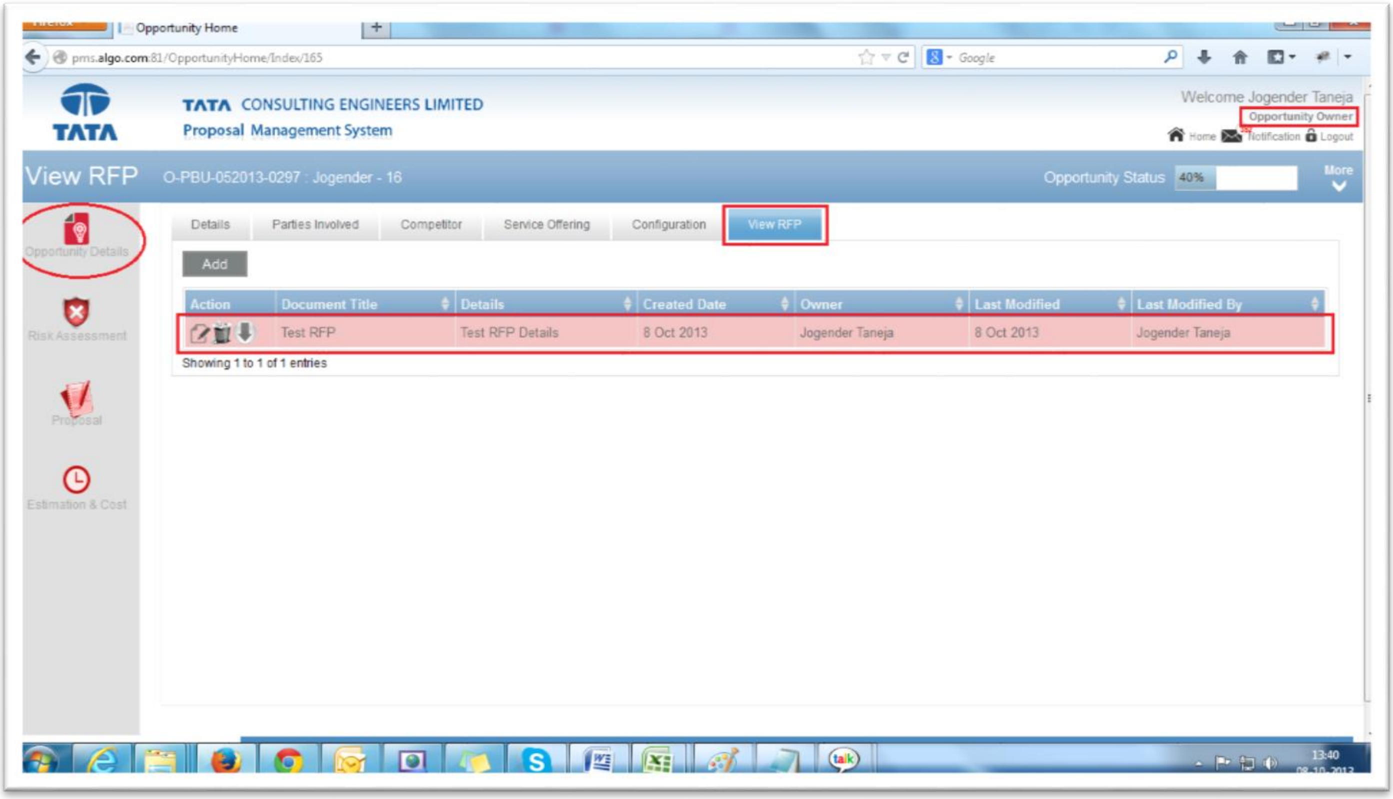
Step 2: Browse for the RFP document to be uploaded and fill in other appropriate details in the "Upload Document" popup screen.

Step 3: Check the "Is Main" checkbox if the document to be uploaded is the main RFP document for the opportunity and click Submit button.


http://localhost:85/OpportunityHome/Index/114
Opportunity Home
TATA CONSULTING ENGINEERS LIMITED
Proposal Management System
Welcome Jogender Taneja
Opportunity Owner
Home
Notification
Logout
View RFP
O-PBU-052013-0154 : Jatin - 3
Opportunity Status
0%
More
Opportunity Details
Risk Assessment
Proposal
Details
Parties Involved
Competitor
Service Offering
Configuration
View RFP
Add
Action
Document Title
Details
Created Date
Owner
Last Modified
Last Modified By
test
test details
23 Sep 2013
Jogender Taneja
23 Sep 2013
Jogender Taneja
Showing 1 to 1 of 1 entries
Upload Document
Browse *
C:\Users\Algo\Pictures\G
Browse...
Title *
RFP Document
Details *
Details for RFP Document
Is Main
Submit

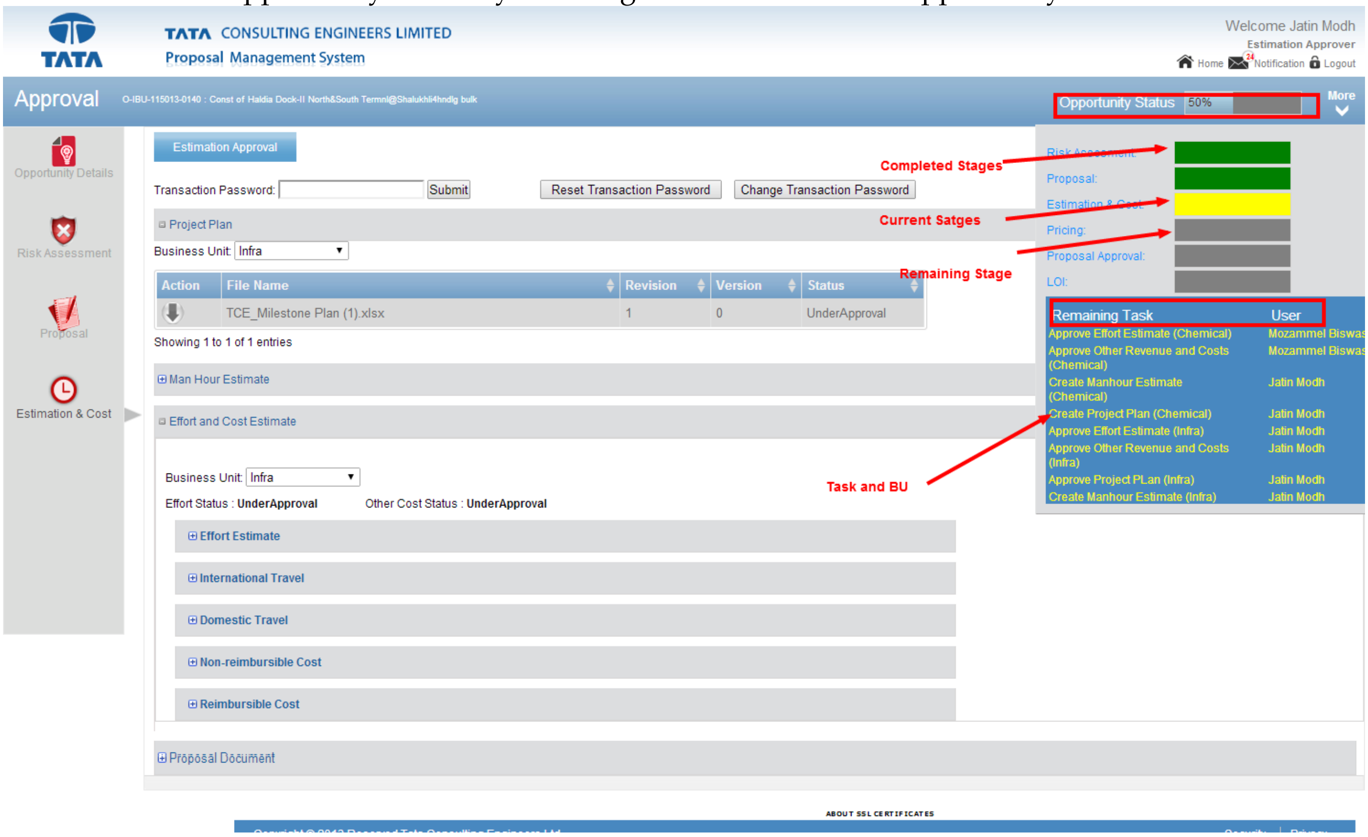
Identify Main RFP Document

Similar to the Competitor screen, the highlighted row in pink colour on this screen shows the main RFP document uploaded against the opportunity.



5.7 Opportunity Status

User can see the Opportunity Status by hovering mouse on the link “Opportunity Status”.



In the above image Current Stage is represented by Yellow Colour, Completed Stages are represented by Green Colour and all Remaining/Pending Stages are represented by Grey Colour.
Status Bar also displays all In-Progress task with Business Unit name and name of Task Assignee. In short, using this user can quickly view status of opportunity, current stage and users who need to take action currently.

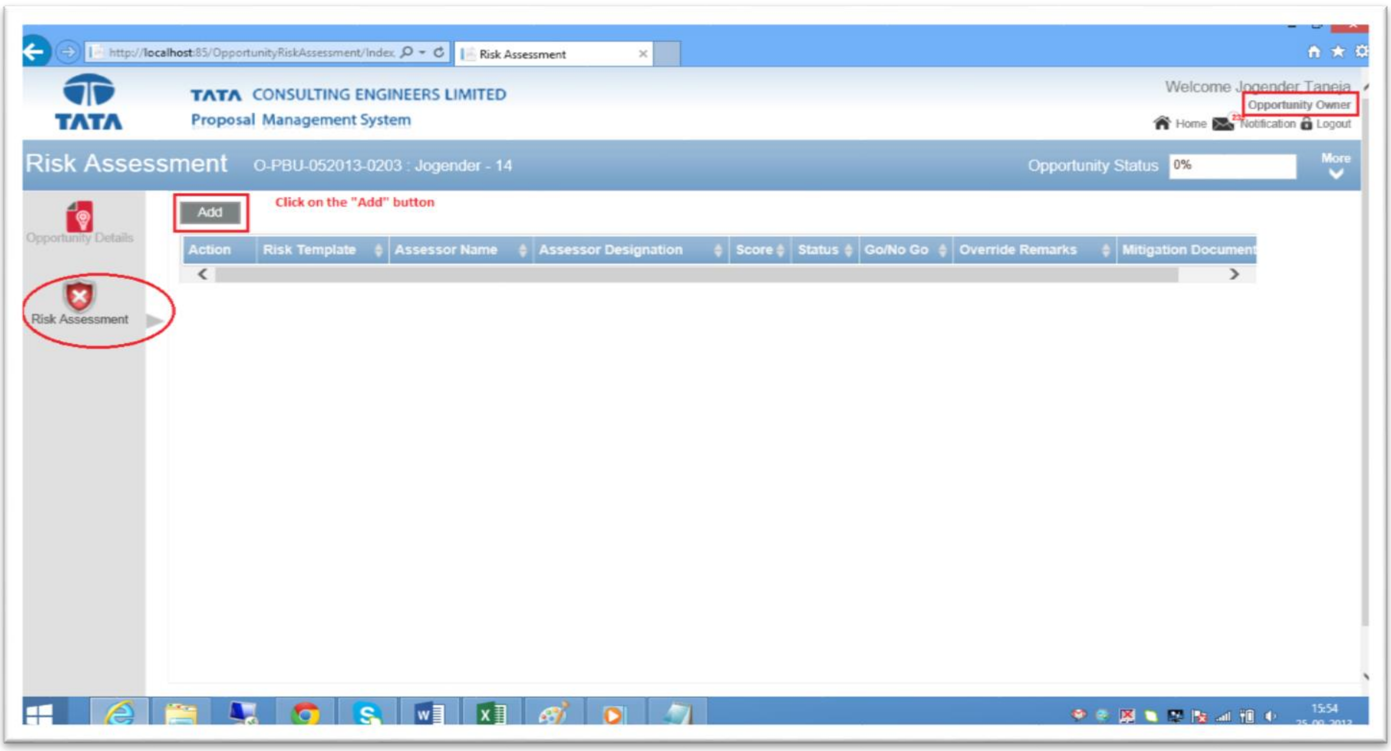
6 STAGE 2: RISK ASSESSMENT

Risk Assessment is the most important aspect related to the opportunity before the Proposal for the opportunity is created. End user can enter into the "Risk Assessment" module by clicking the link "Risk Assessment" from the left navigation tab. Opportunity Owner has to select the risk templates from the already added templates through Admin module and he then assigns these templates to different Risk Assessors for them to do the risk assessments.

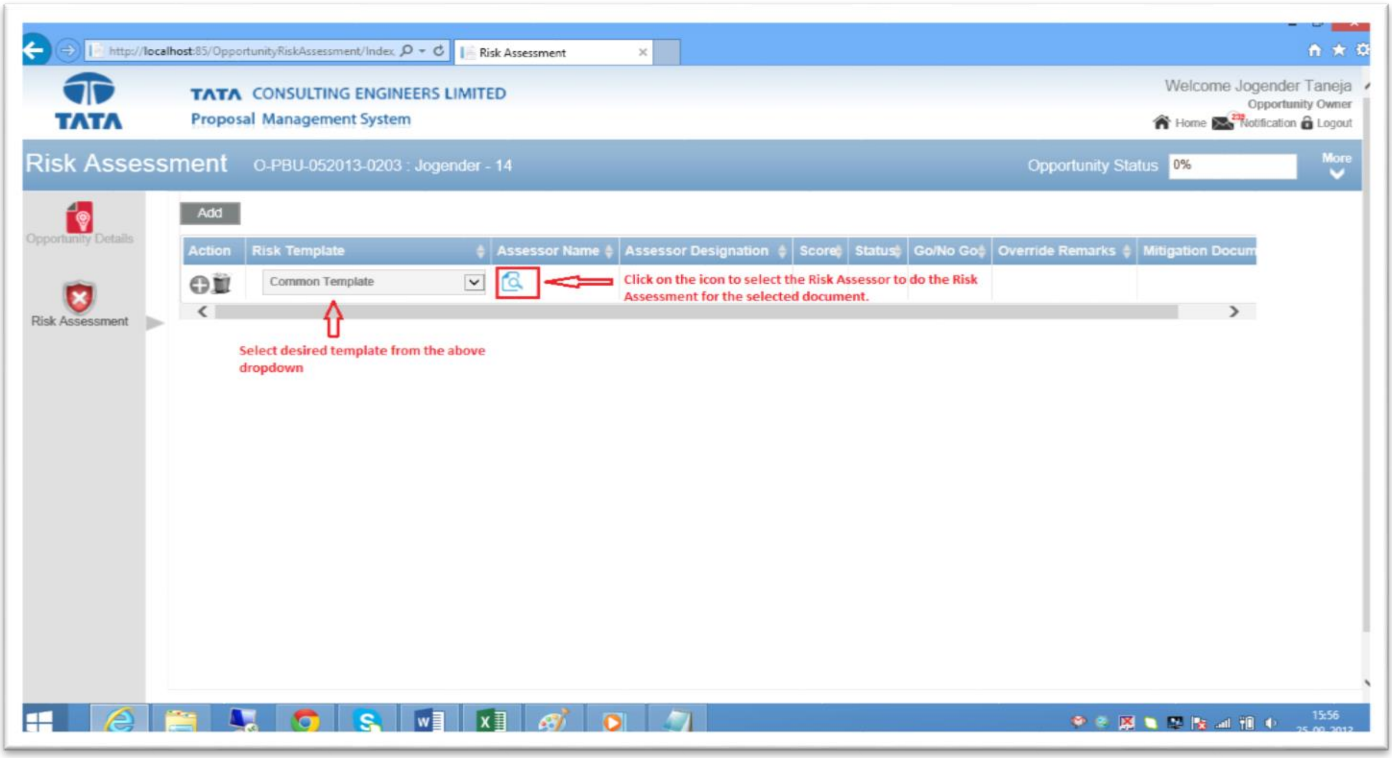
Below is workflow for risk assessment approval

6.1 Define Risk Templates to Risk Assessors

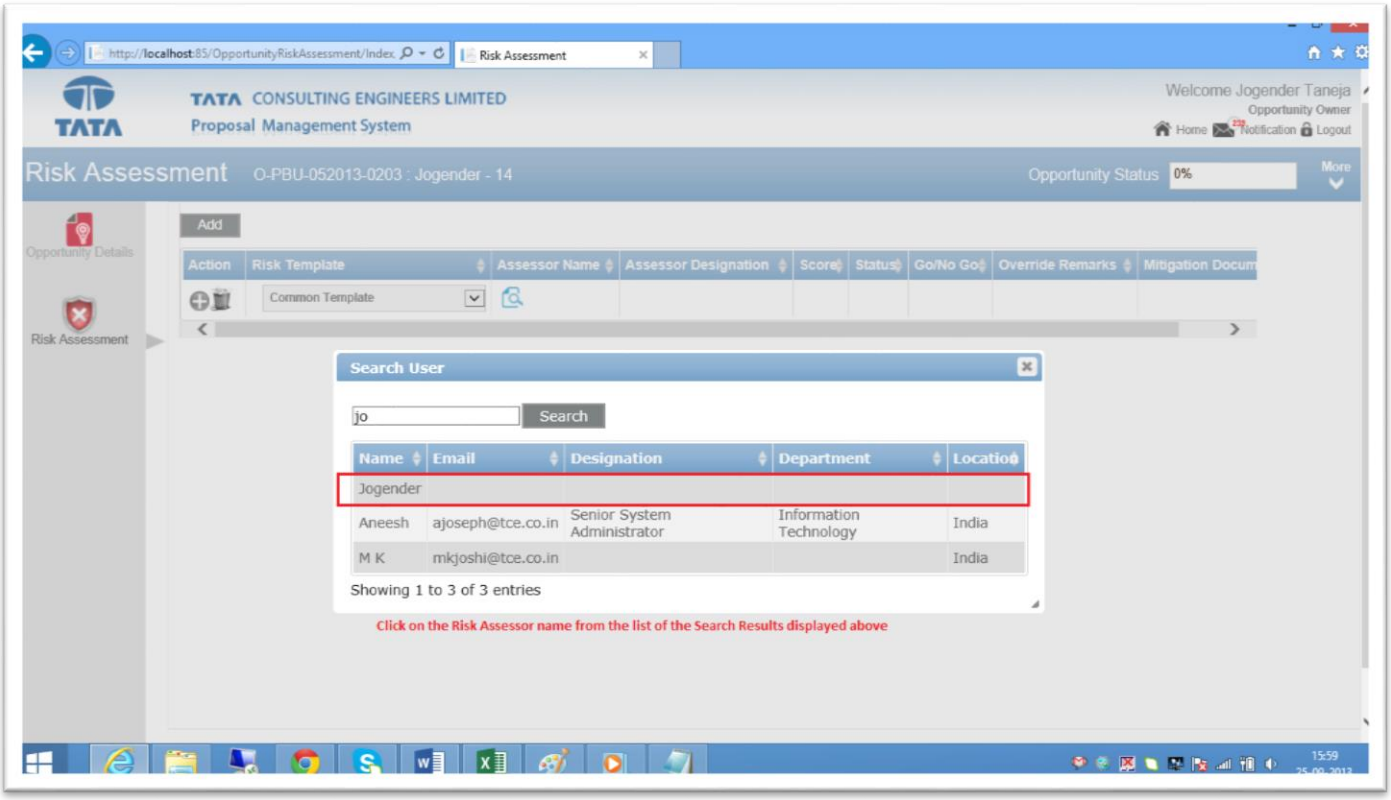
Step 1: Click on the “Add” button.



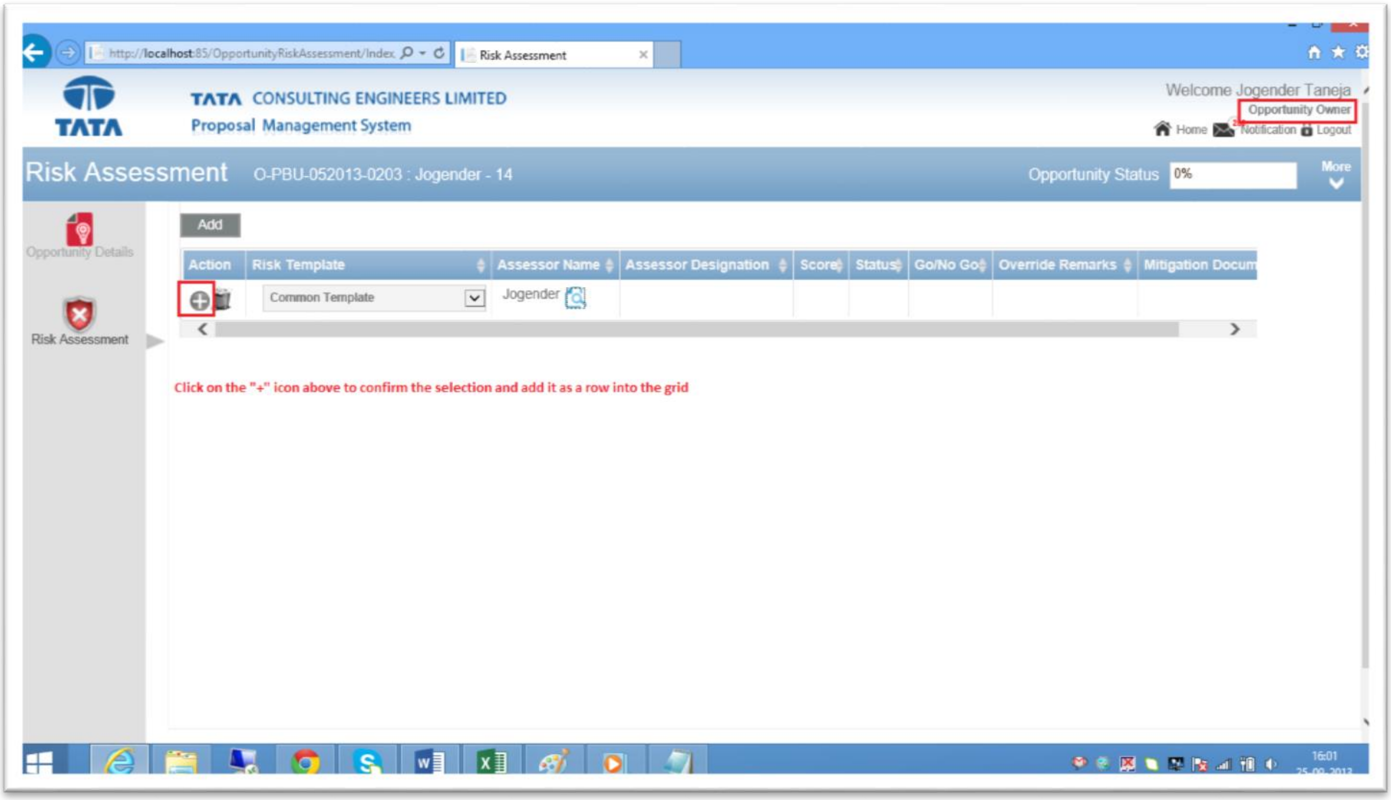
Step 2: Select the Risk Assessor who needs to do the assessments and also select the desired risk template from the Risk Template dropdown menu.

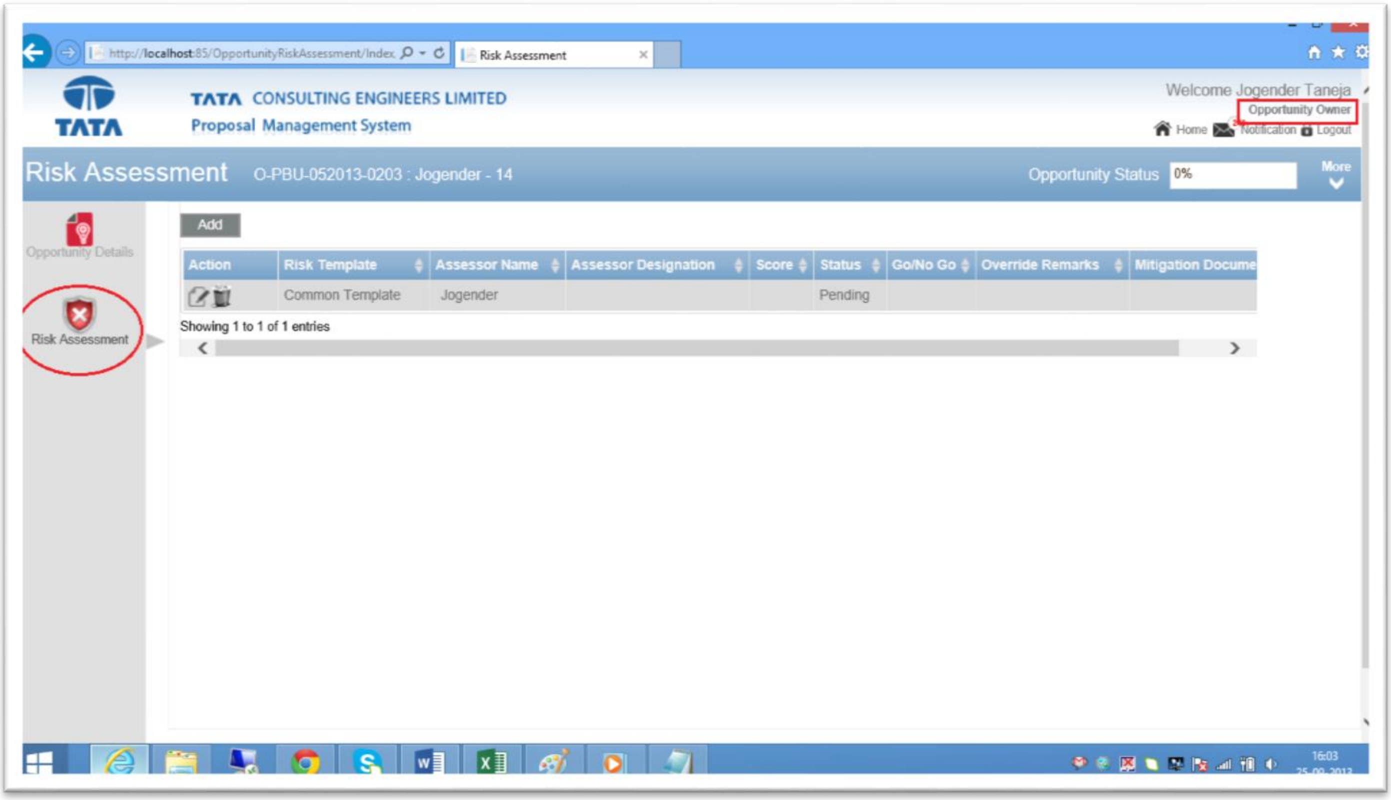


http://localhost:85/OpportunityRiskAssessment/Index
Risk Assessment
TATA CONSULTING ENGINEERS LIMITED
Proposal Management System
Welcome Jogender Taneja
Opportunity Owner
Home
Notification
Logout
Risk Assessment
O-PBU-052013-0203 : Jogender - 14
Opportunity Status
0%
More
Opportunity Details
Risk Assessment
Add
Action
Risk Template
Assessor Name
Assessor Designation
Score
Status
Go/No Go
Override Remarks
Mitigation Docum
Common Template
Click on the icon to select the Risk Assessor to do the Risk Assessment for the selected document.
Select desired template from the above dropdown



http://localhost:85/OpportunityRiskAssessment/Index
Risk Assessment
TATA CONSULTING ENGINEERS LIMITED
Proposal Management System
Welcome Jogender Taneja
Opportunity Owner
Home
Notification
Logout
Risk Assessment
O-PBU-052013-0203 : Jogender - 14
Opportunity Status
0%
More
Opportunity Details
Risk Assessment
Add
Action
Risk Template
Assessor Name
Assessor Designation
Score
Status
Go/No Go
Override Remarks
Mitigation Docum
Common Template
Search User
jo
Search
Name
Email
Designation
Department
Location
Jogender
Aneesh
ajoseph@tce.co.in
Senior System Administrator
Information Technology
India
M K
mkjoshi@tce.co.in
India
Showing 1 to 3 of 3 entries
Click on the Risk Assessor name from the list of the Search Results displayed above


TATA CONSULTING ENGINEERS LIMITED
Proposal Management System
Welcome Jogender Taneja
Opportunity Owner
Risk Assessment
O-PBU-052013-0203 : Jogender - 14
Opportunity Status
Add
Action
Risk Template
Assessor Name
Assessor Designation
Common Template
Jogender
Click on the "+" icon above to confirm the selection and add it as a row into the grid

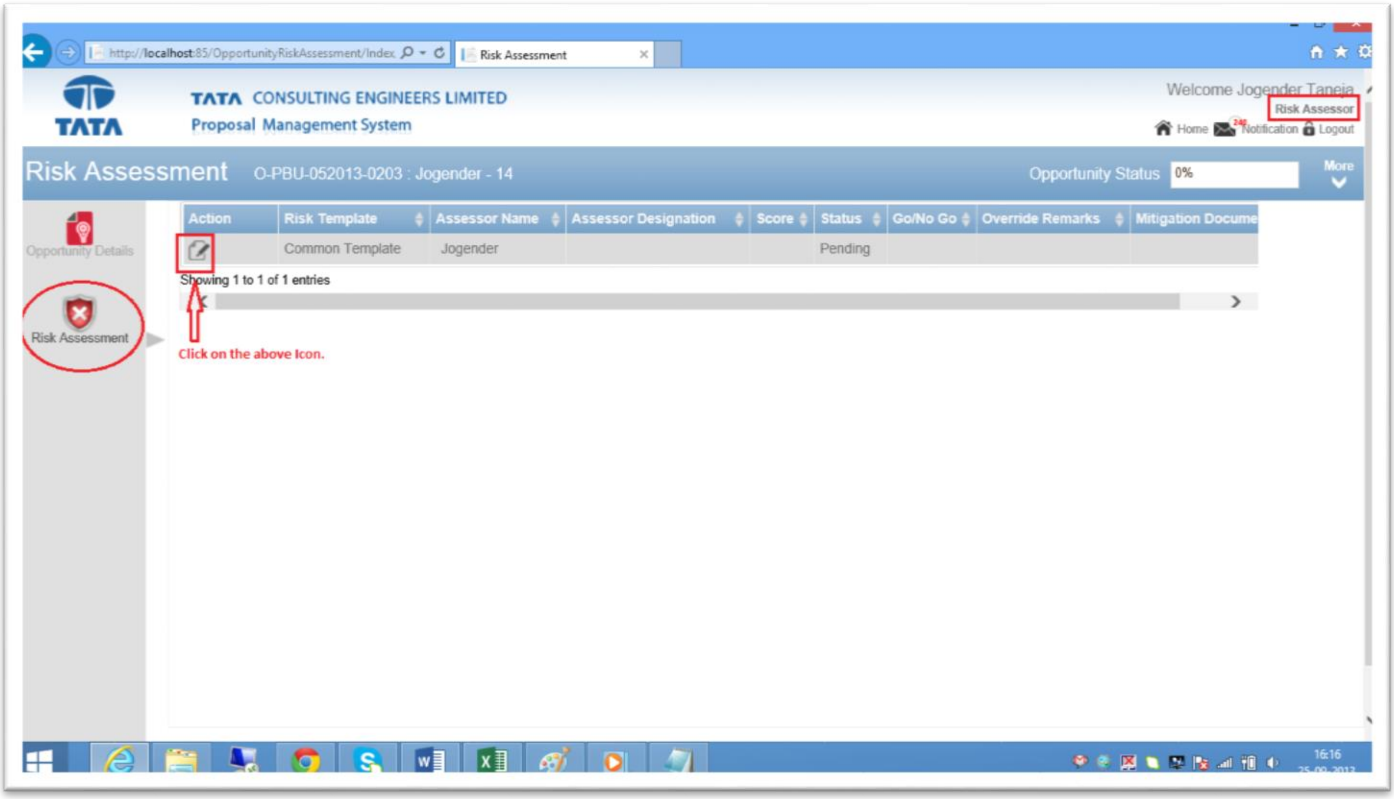

TATA CONSULTING ENGINEERS LIMITED
Proposal Management System
Welcome Jogender Taneja
Opportunity Owner
Risk Assessment
O-PBU-052013-0203 : Jogender - 14
Opportunity Status
Add
Action
Risk Template
Assessor Name
Assessor Designation
Common Template
Jogender
Pending
Showing 1 to 1 of 1 entries

6.2 Assess Risk for the pre-defined templates

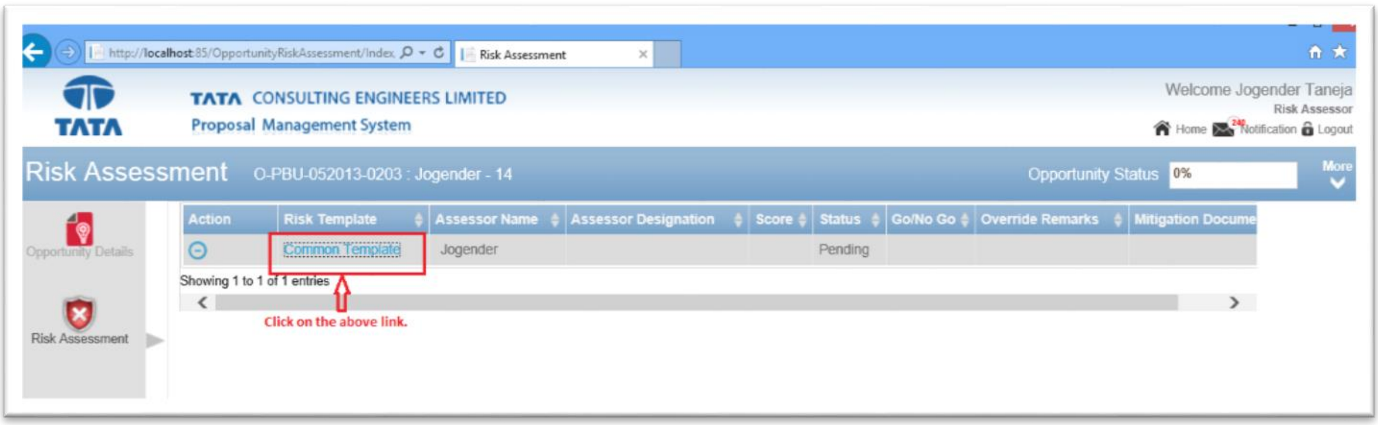
Now the selected Risk Assessor can login into his account and start doing the Risk Assessment for the template assigned to him.

Risk Assessor has to follow the below steps to do the risk assessment:

Step 1: Click on the Edit icon (shown in the below screen shot)

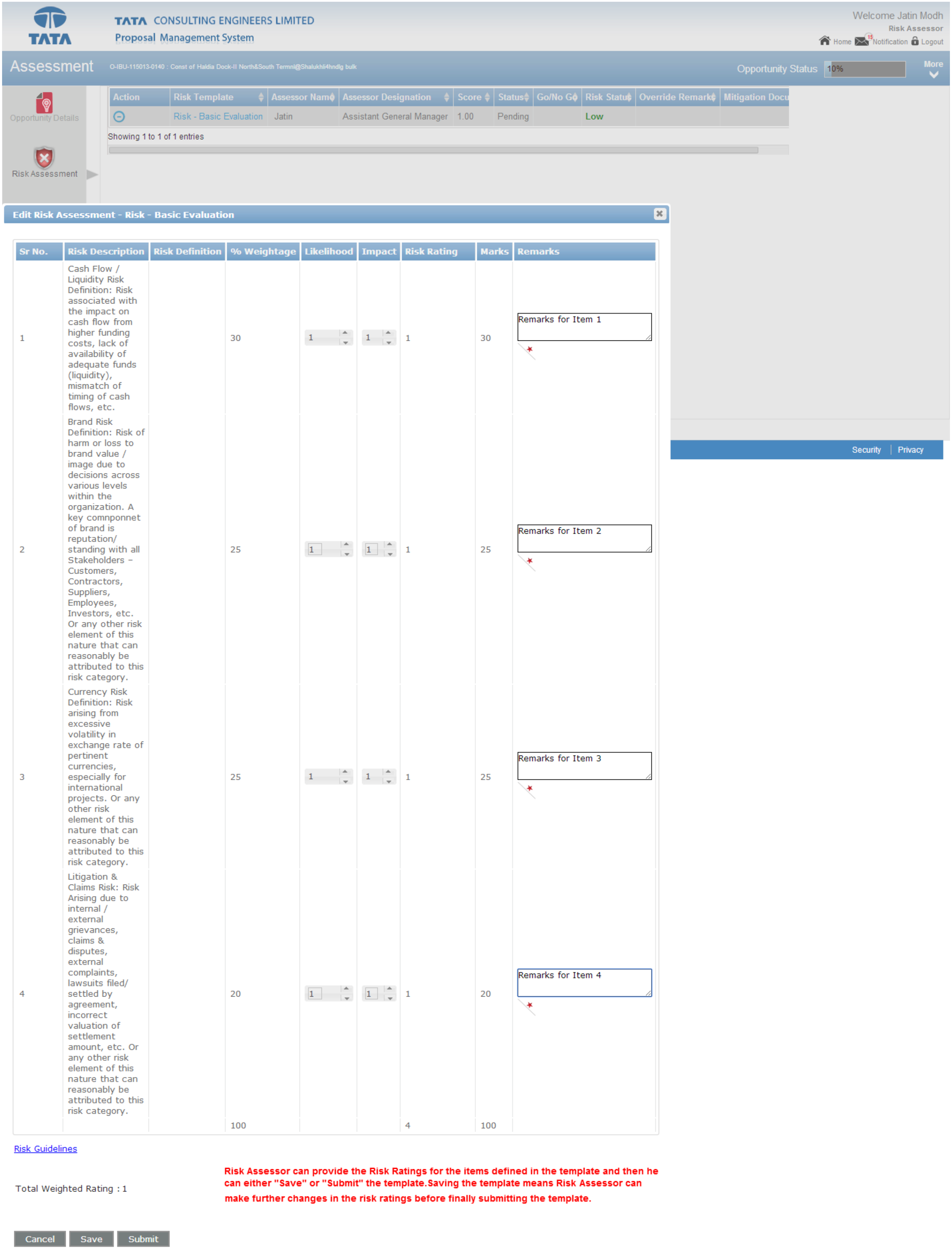


Step 2: Click on the "Risk Template" name link



Step 3:

Risk Assessor can provide the Risk Ratings for the items defined in the template and then he can either "Save" or "Submit" the template. Saving the template means Risk Assessor can make further changes in the risk ratings before finally submitting the template. Once the Risk Assessor has submitted the template, he cannot make any more changes.



TATA CONSULTING ENGINEERS LIMITED
Proposal Management System

Welcome Jatin Modh
Risk Assessor
Home Notification Logout

Assessment O-IBU-115013-0140 : Const of Haldia Dock-II North&South Termnl@Shalukhli4hndlg bulk

Opportunity Status 10% More

Opportunity Details

Risk Assessment

Action	Risk Template	Assessor Name	Assessor Designation	Score	Status	Go/No Go	Risk Status	Override Remarks	Mitigation Docu
	Risk - Basic Evaluation	Jatin	Assistant General Manager	1.00	Pending		Low		

Showing 1 to 1 of 1 entries

Edit Risk Assessment - Risk - Basic Evaluation

Sr No.	Risk Description	Risk Definition	% Weightage	Likelihood	Impact	Risk Rating	Marks	Remarks
1	Cash Flow / Liquidity Risk Definition: Risk associated with the impact on cash flow from higher funding costs, lack of availability of adequate funds (liquidity), mismatch of timing of cash flows, etc.		30	1	1	1	30	Remarks for Item 1 *
2	Brand Risk Definition: Risk of harm or loss to brand value / image due to decisions across various levels within the organization. A key comnponnet of brand is reputation/ standing with all Stakeholders – Customers, Contractors, Suppliers, Employees, Investors, etc. Or any other risk element of this nature that can reasonably be attributed to this risk category.		25	1	1	1	25	Remarks for Item 2 *
3	Currency Risk Definition: Risk arising from excessive volatility in exchange rate of pertinent currencies, especially for international projects. Or any other risk element of this nature that can reasonably be attributed to this risk category.		25	1	1	1	25	Remarks for Item 3 *
4	Litigation & Claims Risk: Risk Arising due to internal / external grievances, claims & disputes, external complaints, lawsuits filed/ settled by agreement, incorrect valuation of settlement amount, etc. Or any other risk element of this nature that can reasonably be attributed to this risk category.		20	1	1	1	20	Remarks for Item 4 *
			100			4	100	

Risk Guidelines

Total Weighted Rating : 1

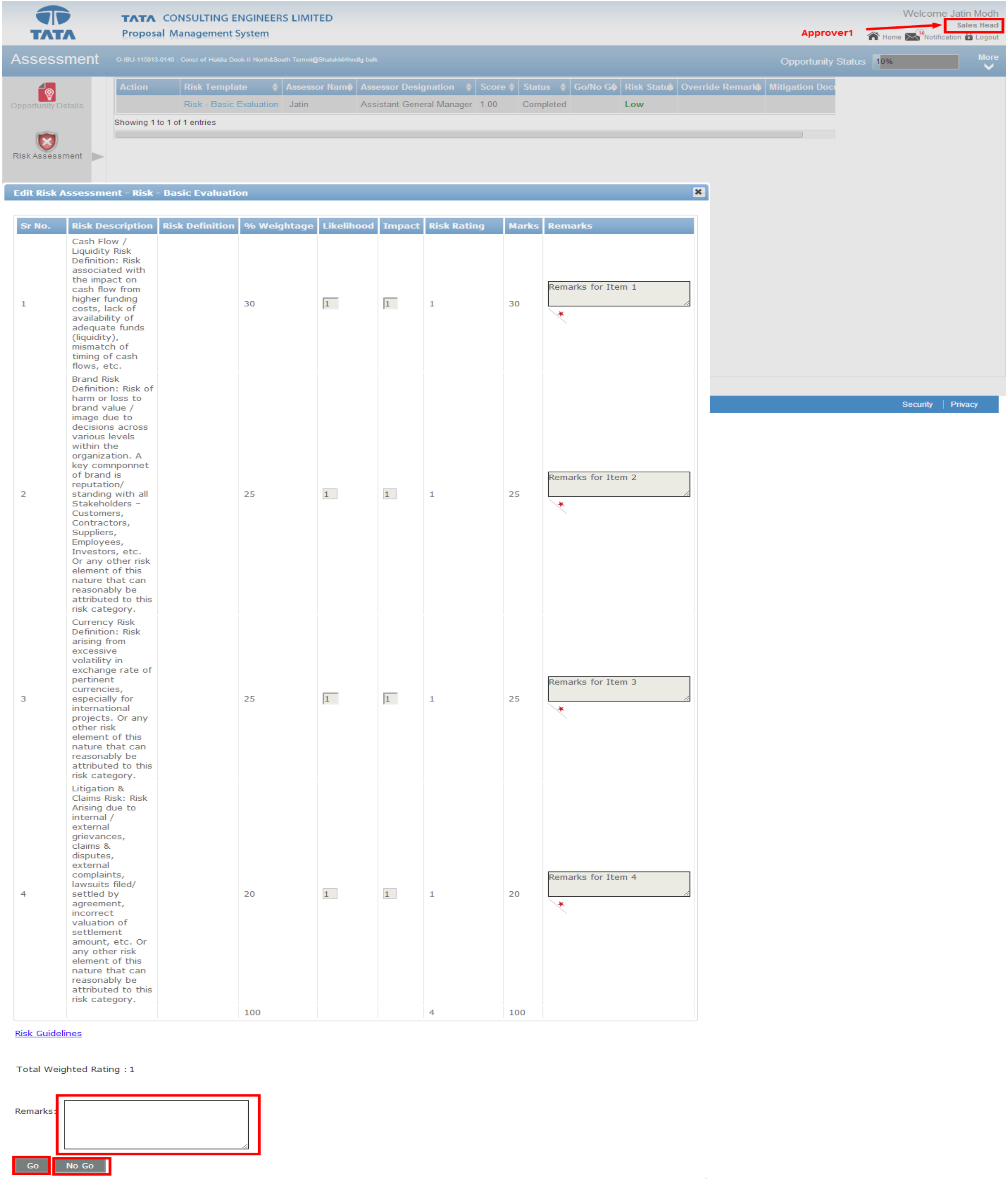
Risk Assessor can provide the Risk Ratings for the items defined in the template and then he can either "Save" or "Submit" the template.Saving the template means Risk Assessor can make further changes in the risk ratings before finally submitting the template.

Cancel Save Submit

Security | Privacy

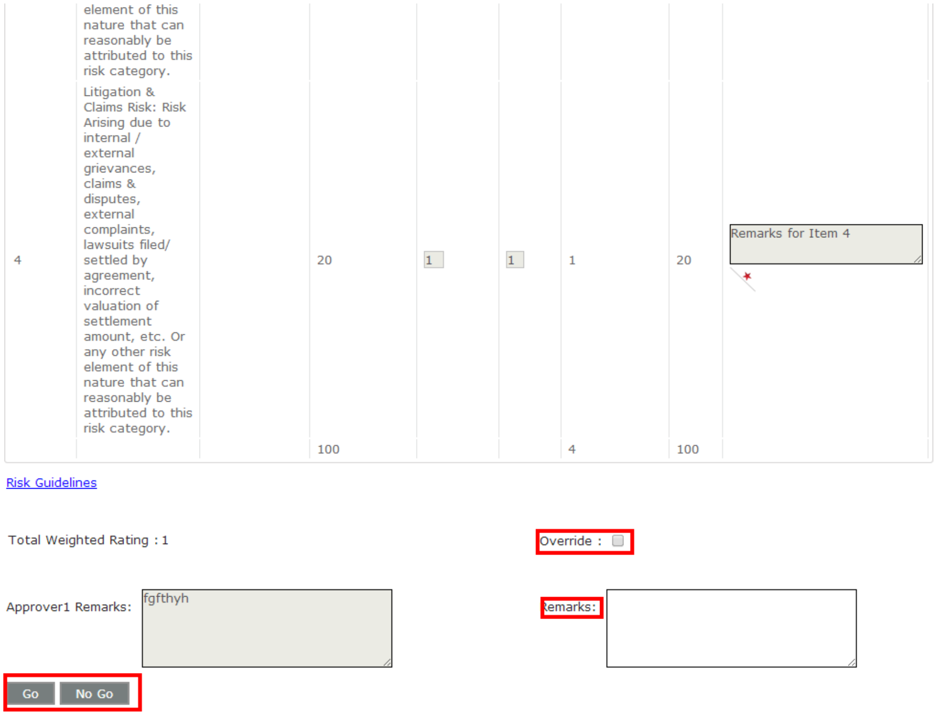
6.3 Assessment Review

After submitting the template by Assessor, corresponding Reviewer can take action on this assessment. He can set Go or No-Go status for this and give his comments.



6.4 Assessment Approval

Now the corresponding Approver 2 can login into his account and start doing the Risk Assessment for the template assigned to him.

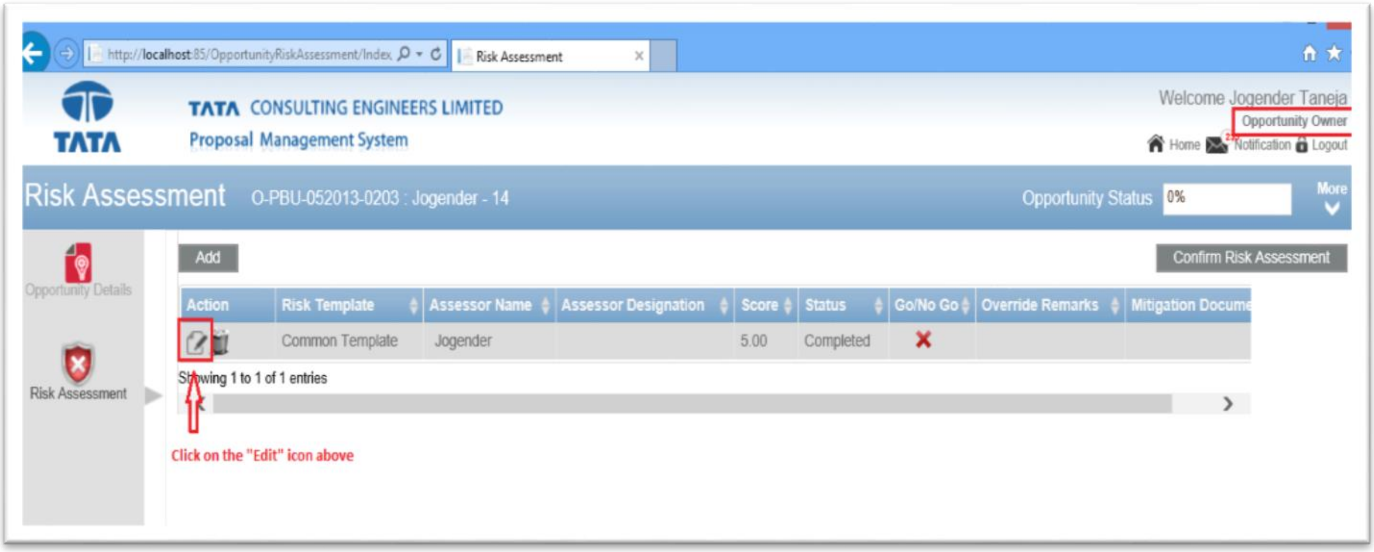


6.5 Override NOGO Risk Rating

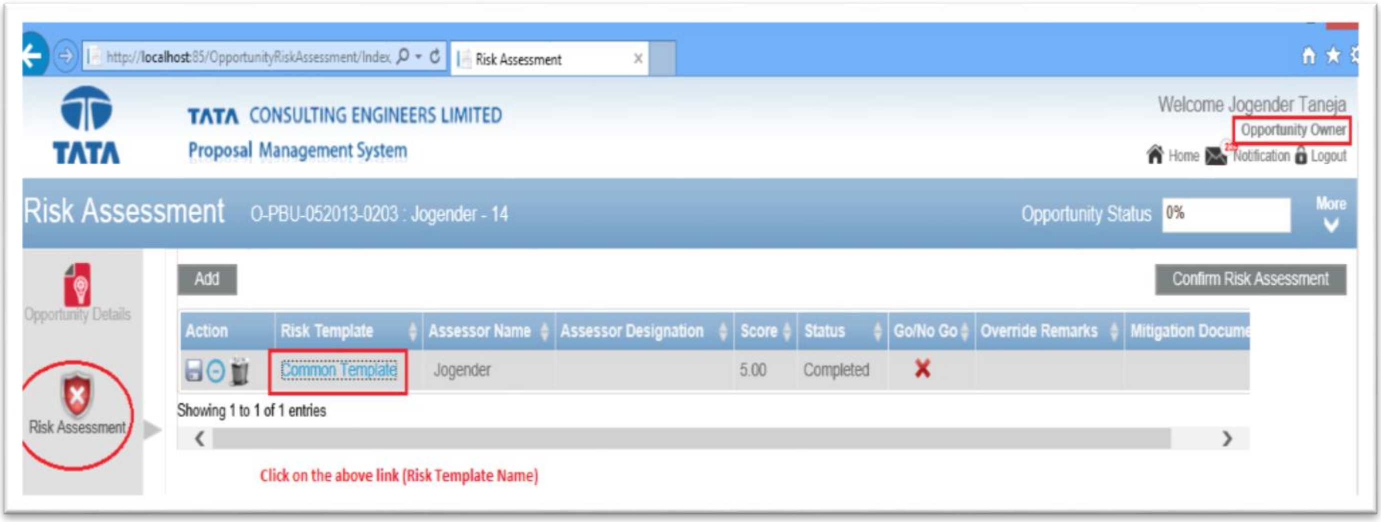
If the Template stage as provided by Risk Reviewer is a "NO GO" stage, then Approver has an option to override the assessment and convert the template into "GO" stage. Approver has to provide a mitigation document against this act and also provide the remarks for the same.
Steps for same are as followings:

Step 1: Login as "Approver 2".

Step 2: Click on the Edit icon (shown in the below screen shot)



Step 3: Click on the Risk Template name link.



Step 4: Check the override checkbox to override the risk rating and upload mitigation document and then click on the Save button.

	reasonably be attributed to this risk category.						
4	Litigation & Claims Risk: Risk Arising due to internal / external grievances, claims & disputes, external complaints, lawsuits filed/ settled by agreement, incorrect valuation of settlement amount, etc. Or any other risk element of this nature that can reasonably be attributed to this risk category.	20	1	1	1	20	Remarks for Item 4 *
		100			4	100	

Risk Guidelines

Total Weighted Rating : 1

Override

Override Remarks:

Browse Choose File No file chosen

Title

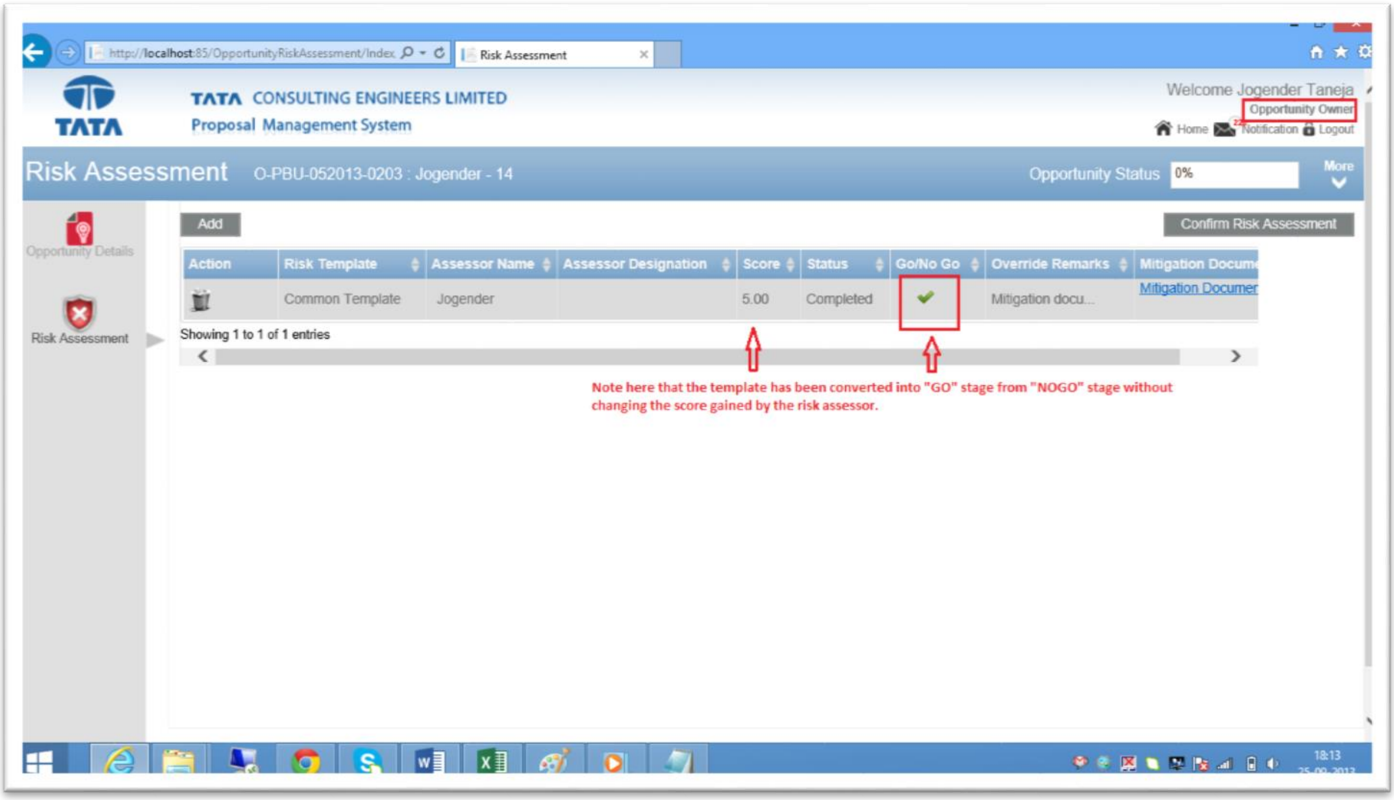
Approver1 Remarks:

fgfthyh

Remarks:

Check the above checkbox to override the risk rating and upload Mitigation Document and then click on GO or NOGO button.

Go No Go



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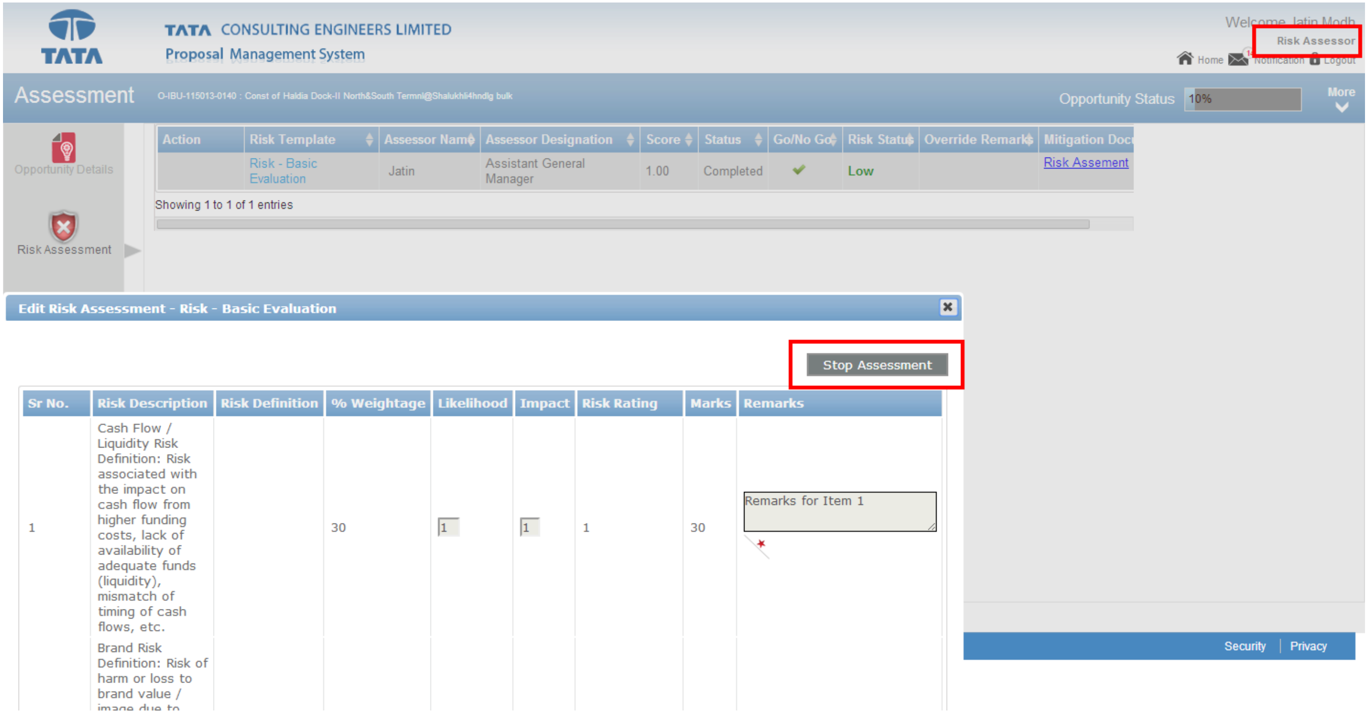
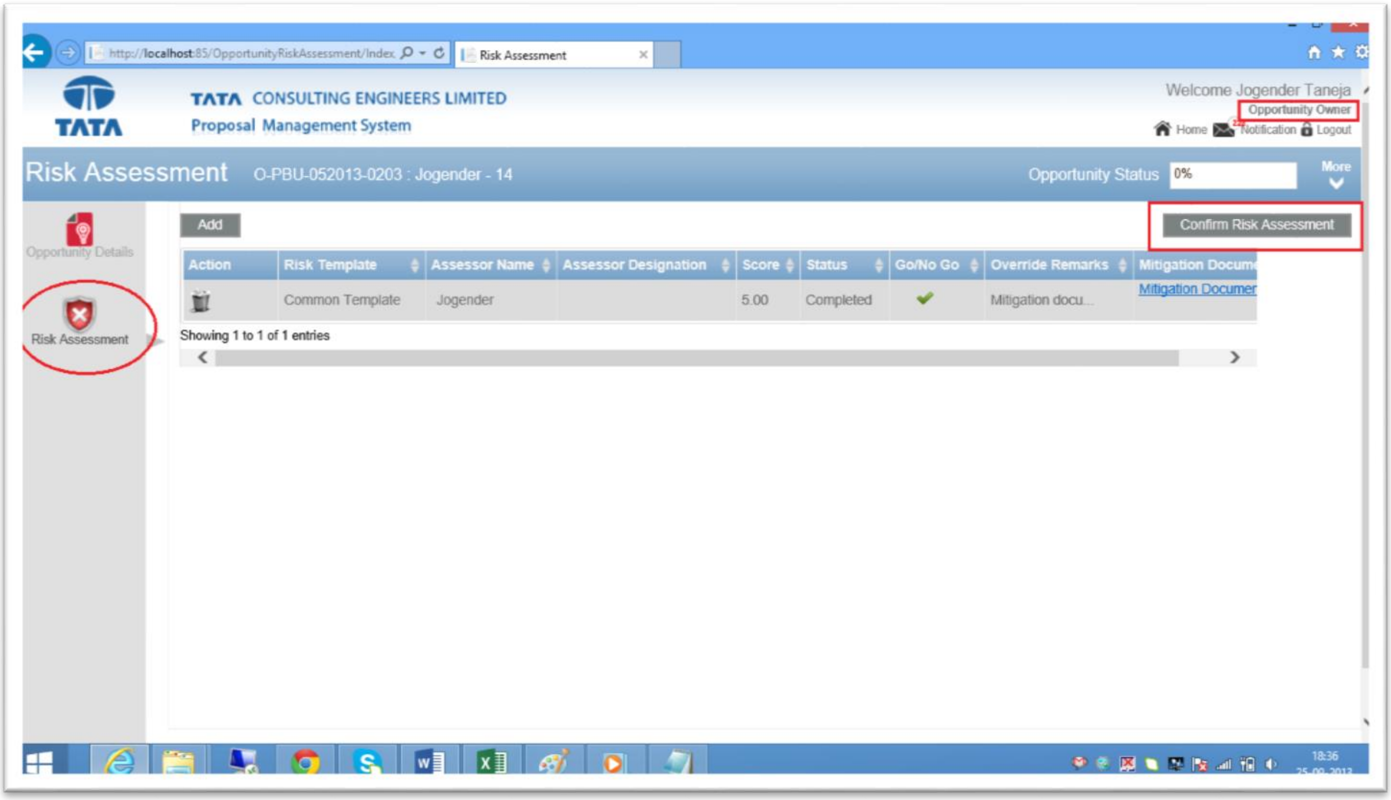
6.6 Stop Risk Assessment

If Risk Assessor needs to make further changes in the risk assessment after the template submitted by him, he can click on “Stop Assessment” button. This button is visible till risk assessment is not finally confirmed By Opportunity Owner. When Assessor clicks on “Stop Assessment” button, status of template get reset irrespective of action taken by Reviewer and Approver and Now Assessor can make changes in assessment done earlier by him.



6.7 Close Risk Assessment Stage

After all the templates assigned to Risk Assessors have their status as “Completed”, Opportunity Owner has an option to “Confirm Risk Assessment”. Clicking the button “Confirm Risk Assessment” by Opportunity Owner triggers the opening of the next stage “Proposal”.



In case even if a single Risk Assessment points to a "No Go" stage, the "Opportunity Owner" goes to the opportunity Detail screen and sets the opportunity status to Closed-(No Go).
However, closed opportunity is available for read only. "Go" stage of the opportunity triggers the opening of Stage 2. Risk assessment tabs in this case will be frozen and could not be changed, but the opportunity and RFP would be open to edit.

7 STAGE 3: PROPOSAL

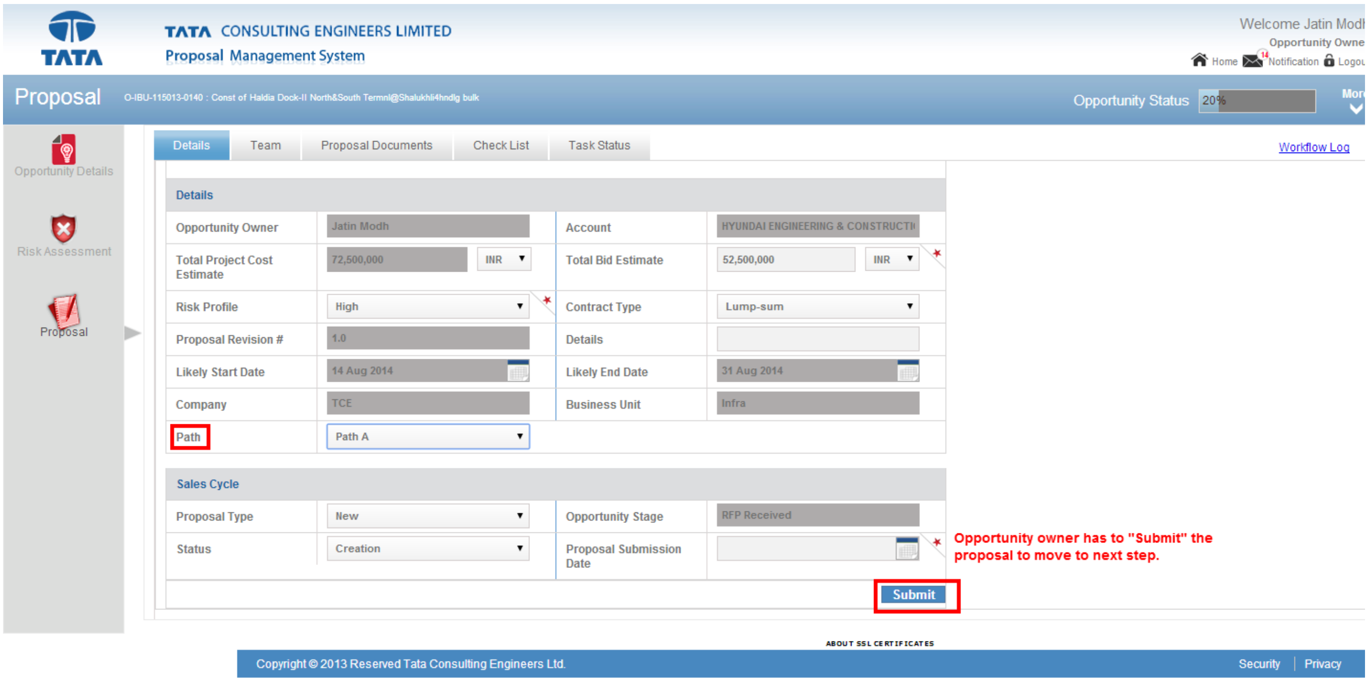
The Stage of PMS starts with Proposal submission by Opportunity Owner. The left navigation tab “Proposal” is activated on the opening of this stage.
As soon as the Proposal is submitted, the opportunity owner can then create the team for the opportunity.
The Proposal Team consists of “Proposal Coordinator”, “Proposal Engineer”, “Proposal Reviewer”, “Finance Reviewer” ,”Proposal Approver” and “Estimation Reviewer”. Every team member has a particular set of tasks that have to be completed by them within the defined time limits and doing so moves the opportunity to further stages.

Proposal

7.1.1 Details

<u>Add data into Proposal Details and Create Proposal:</u>

This screen shows all the “Proposal Details” and the “Sales Cycle” to the User. Opportunity Owner can set the values for “Risk Profile”, “Total Bid Estimate” and “Contract Type” in the Details section and “Proposal Type”, “Status” and “Proposal Submission Date” in the Sales Cycle section. Opportunity Owner can also set the path for the proposal. Opportunity Owner has to “Submit” the Proposal before he can add members to the team.



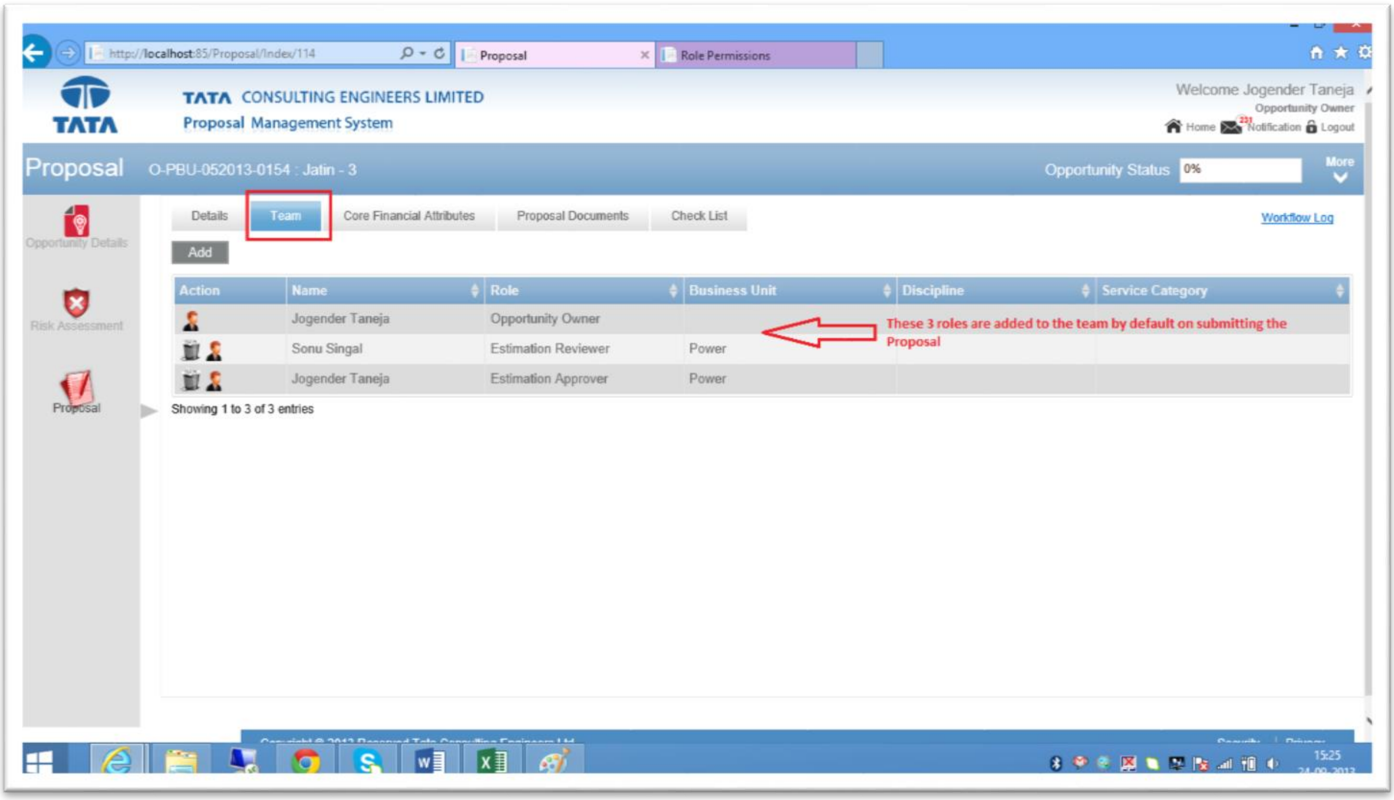
7.1.2 Team

7.1.2.1 Path A

Add member to Proposal Team and assign roles:

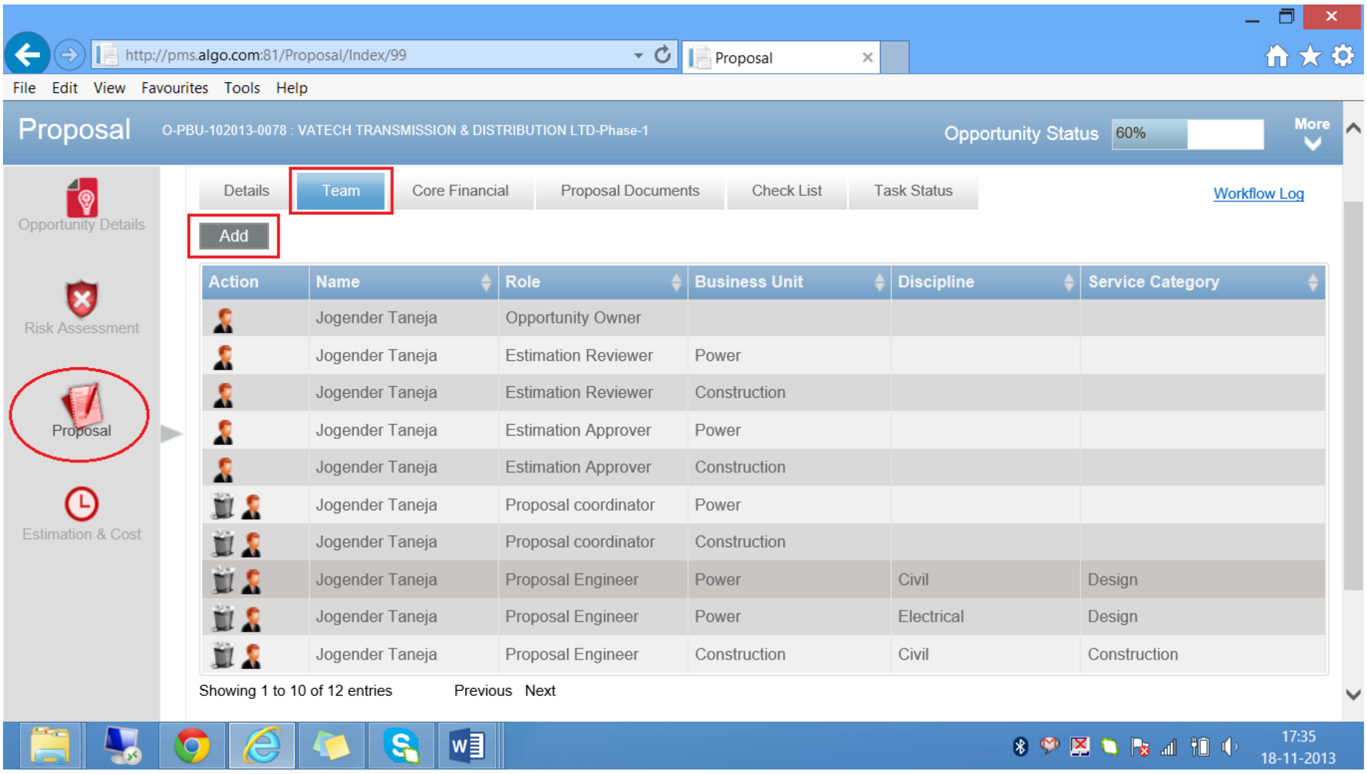
After the Proposal has been submitted, Opportunity Owner needs to define the team, working with the Proposal. This team includes "Proposal Coordinators", "Proposal Engineers", "Estimation Reviewer" and "Estimation Approver" etc. associated with the opportunity. Every user added to the team has a particular set of tasks that has to be completed and Submitted by them to take the opportunity into further stages.

"Opportunity Owner", "Estimation Reviewer" and "Estimation Approver" are the roles that are added to the team by default when the Proposal is submitted. Here the Opportunity Owner is derived from Sales Logix, Sector Head for the Lead BU and selected Market Type is given the role for "Estimation Reviewer" and HOD for the lead BU is given the role for the "Estimation Approver".

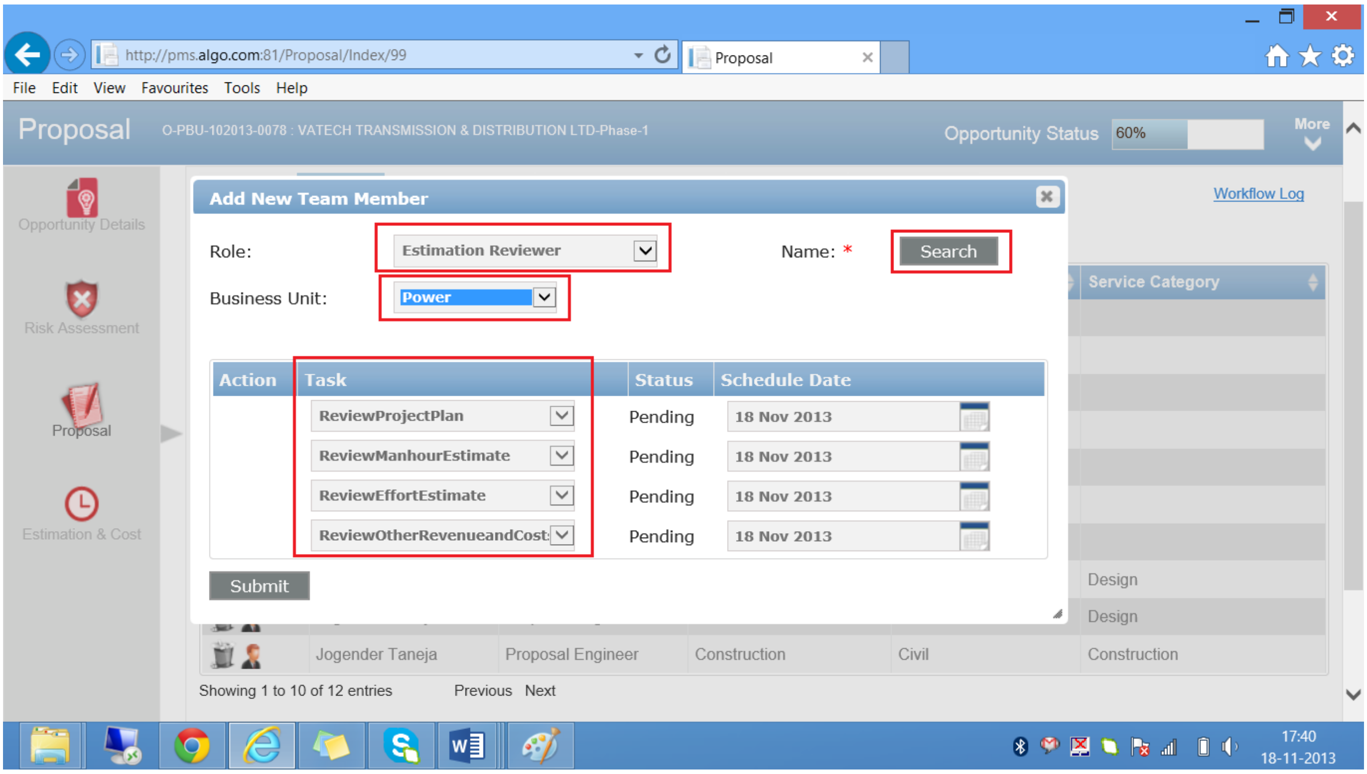


Steps to add the team members for path A:

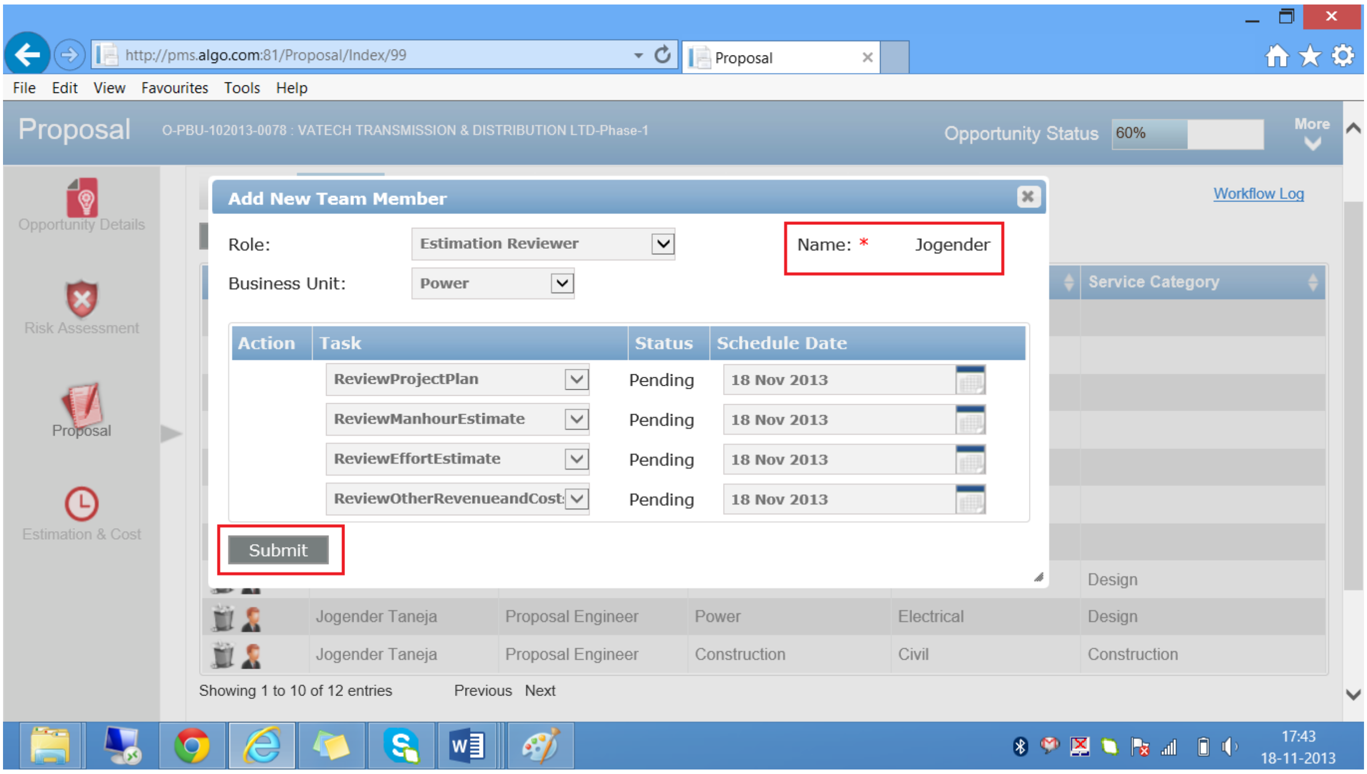
Step 1: Click on the "Add" button



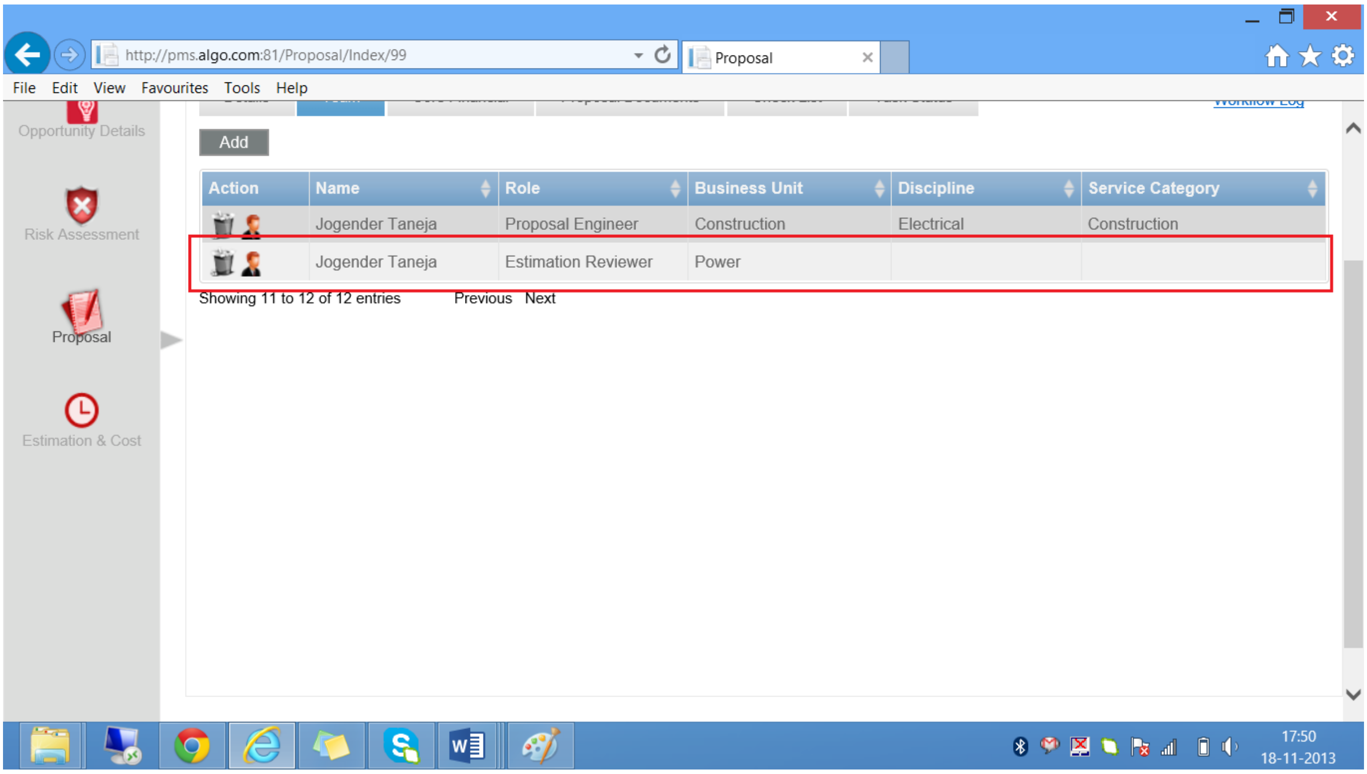
Step 2: Select the Role, Business Unit and the tasks to be added, and then Search the User needed to assign the selected role.



Step 3: Click the "Submit" button.



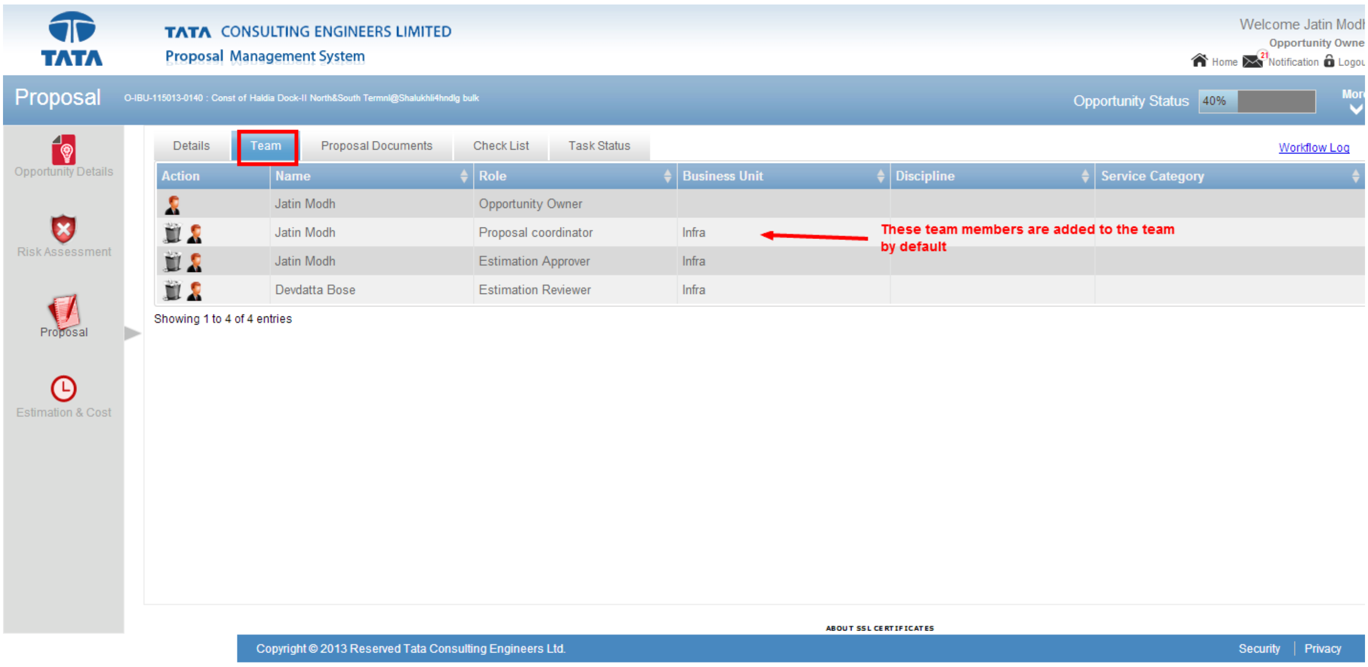
Step 4: The User is successfully added to the team.



7.1.2.2 Path B

<u>Add member to Proposal Team and assign roles:</u>

The "Add" button is disabled for path B and team members are added to the team automatically on uploading the effort or other cost.



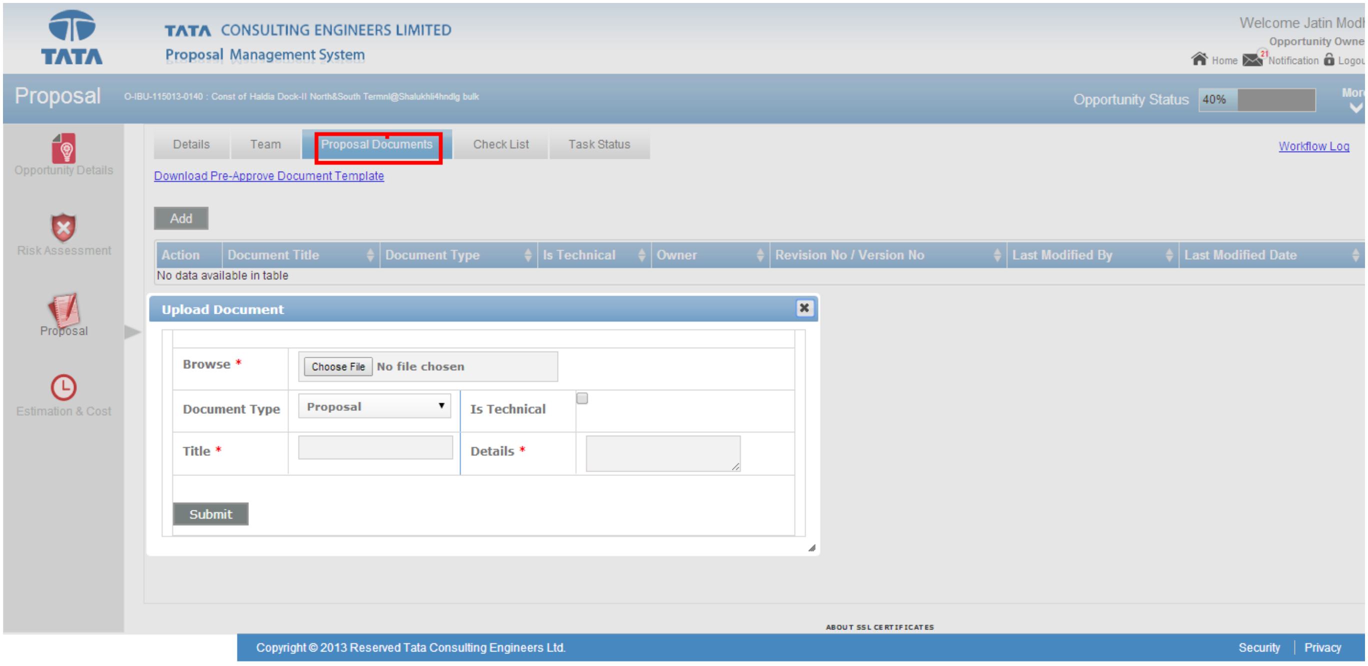
7.1.3 Proposal Documents

Add Proposal Documents

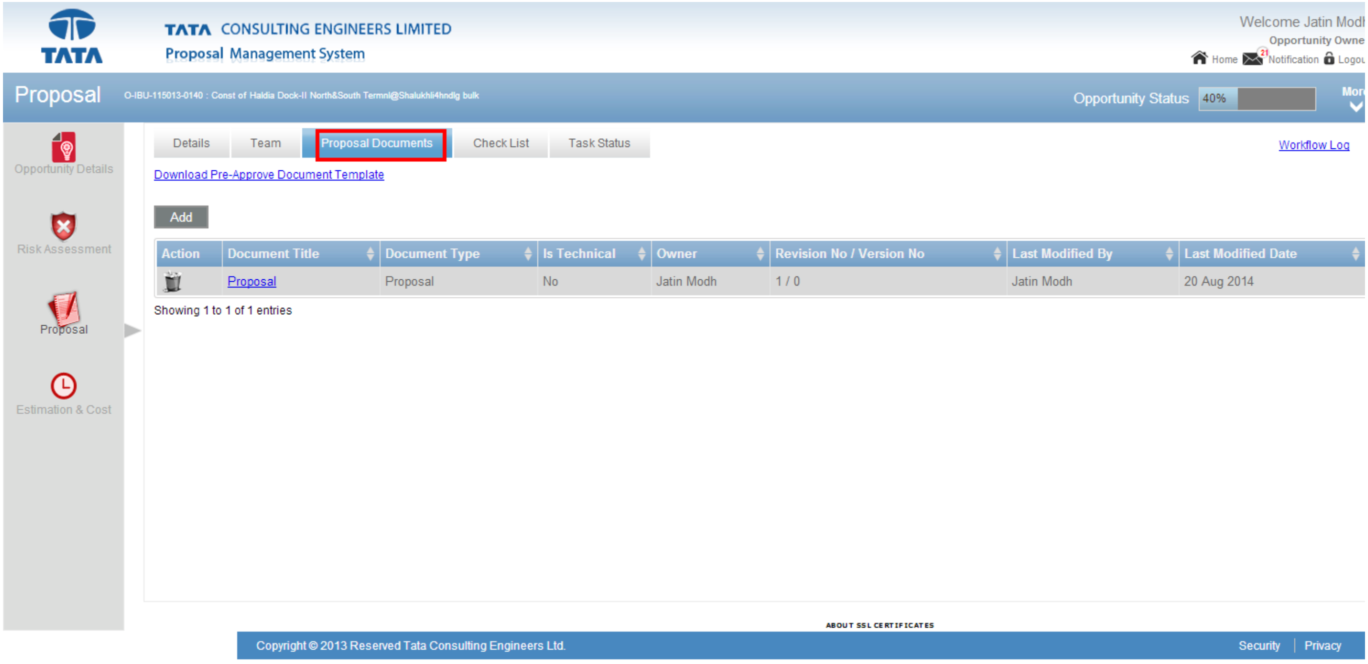
Opportunity Owner can add the Proposal Documents related to the opportunity through this screen. He can define the type of the Proposal Document and also define if the uploaded document is technical document or not.

Steps to add Proposal Document:

Step 1: Click on the "Add" button and fill in all the details in the "Upload Proposal Document" popup screen.

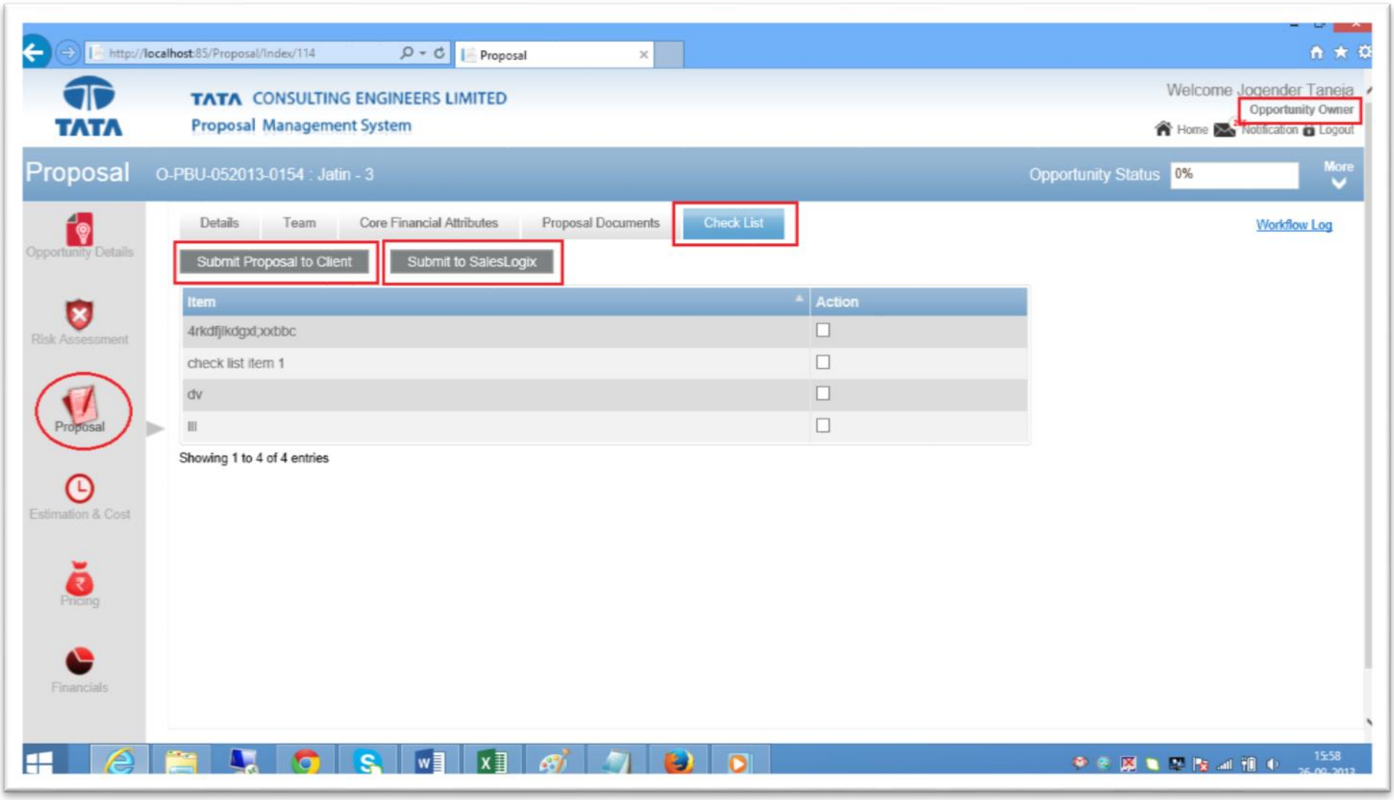


Step 2: After filling in all the details, click “Submit” button.



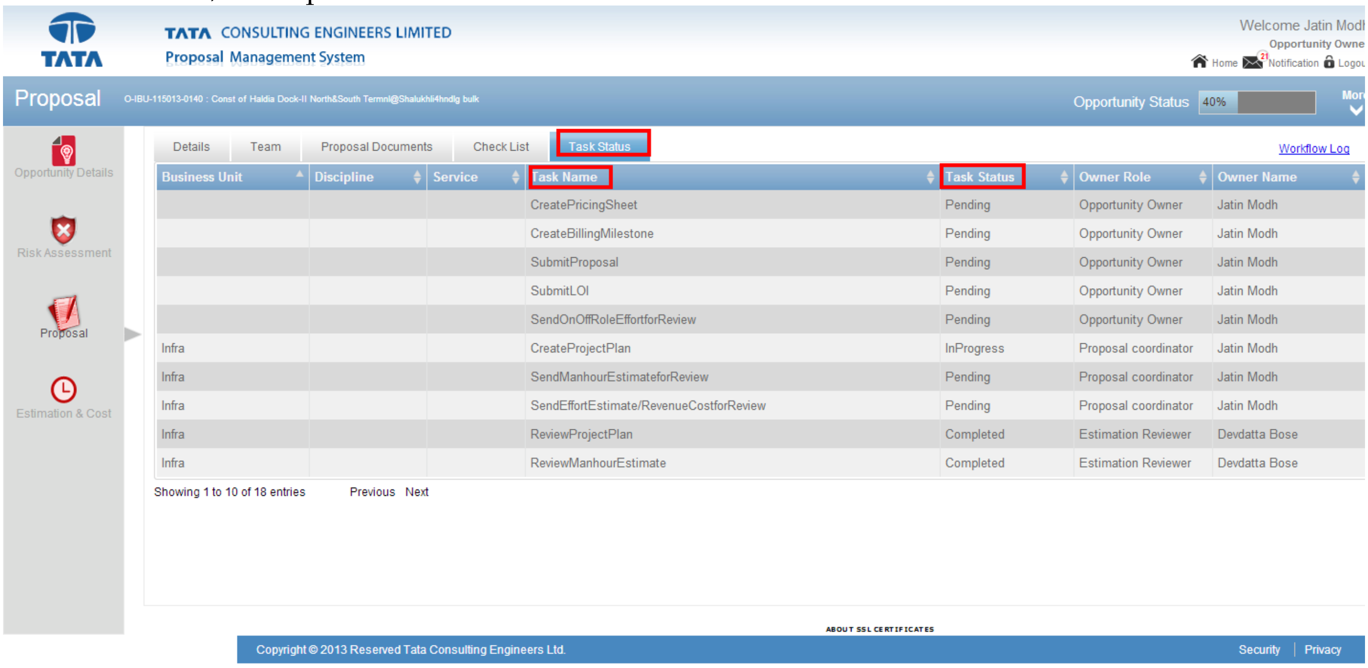
7.1.4 Check List

Opportunity Owner can use this screen to check list the items that needs to be worked upon and apart from that, he has option to submit the Proposal to Client or to the Sales Logix.


http://localhost:85/Proposal/Index/114
Proposal
TATA CONSULTING ENGINEERS LIMITED
Proposal Management System
Welcome Jogender Taneja
Opportunity Owner
Home
Notification
Logout
Proposal
O-PBU-052013-0154 : Jatin - 3
Opportunity Status
0%
More
Opportunity Details
Risk Assessment
Proposal
Estimation & Cost
Pricing
Financials
Details
Team
Core Financial Attributes
Proposal Documents
Check List
Workflow Log
Submit Proposal to Client
Submit to SalesLogix
Item
Action
4rkdfjlkdgxd;xxbbc
check list item 1
dv
lll
Showing 1 to 4 of 4 entries
15:58

7.1.5 Task Status

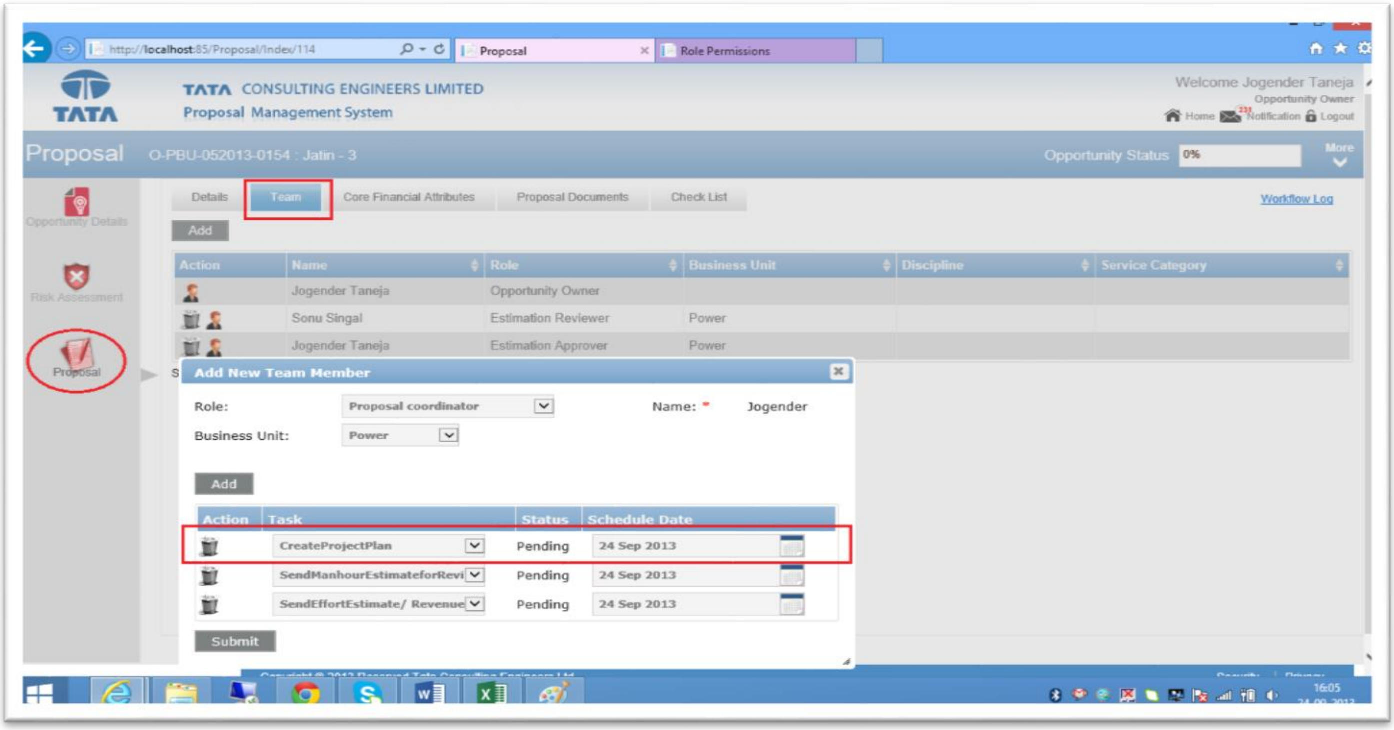
User Can see all the “Task Status” with “task Name”,”Owner Role” and “Owner Name” for All “Business Unit”, “Discipline” and “Services”.

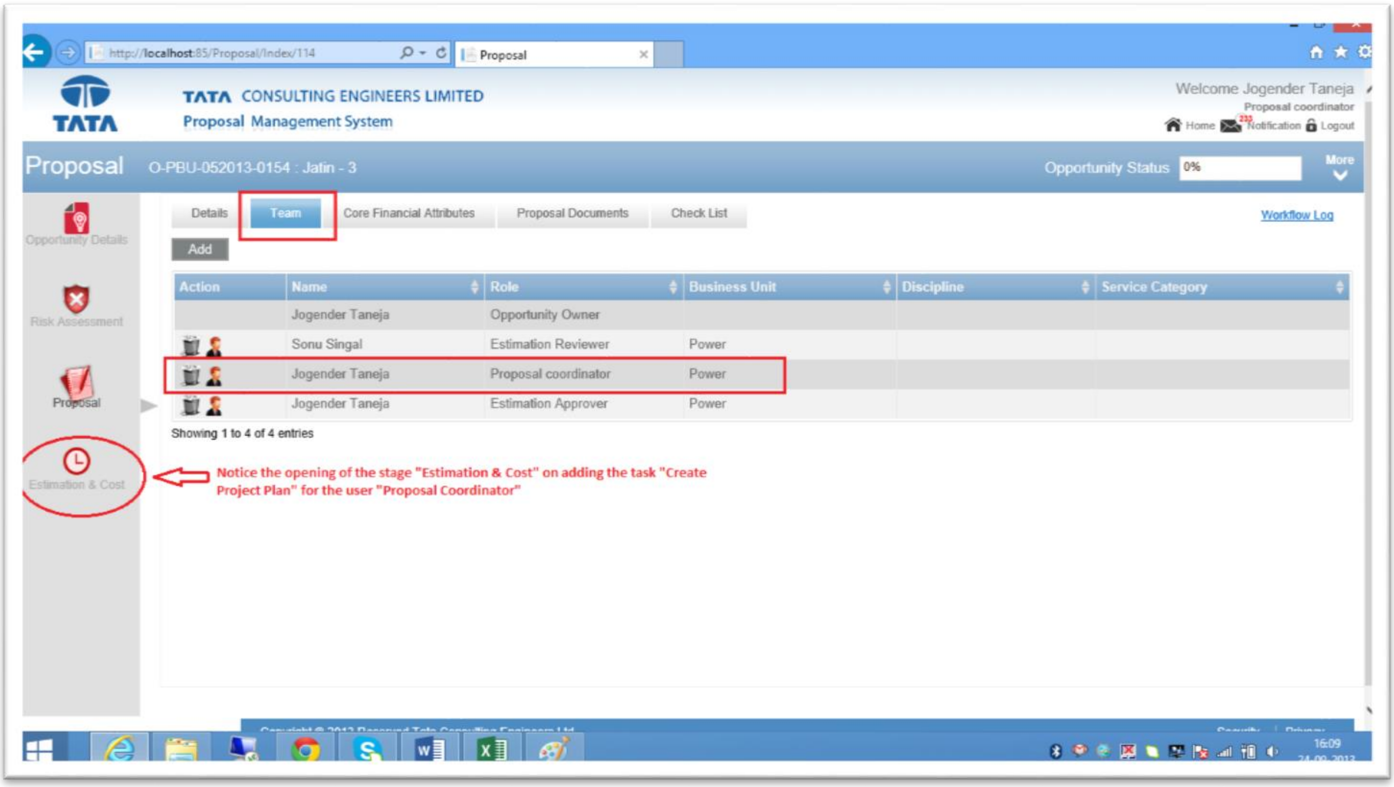


8 STAGE 4: ESTIMATION & COST

Creating the task named “Create Project Plan” in Proposal Team by Opportunity Owner triggers the opening of the stage “Estimation & Cost”.

The left navigation “Estimation & Cost” tab is activated on the opening of stage Estimation & Cost.


TATA CONSULTING ENGINEERS LIMITED
Proposal Management System
Welcome Jogender Taneja
Opportunity Owner
Home
Notification
Logout
Proposal
O-PBU-052013-0154 : Jatin - 3
Opportunity Status
0%
More
Details
Team
Core Financial Attributes
Proposal Documents
Check List
Workflow Log
Add
Action
Name
Role
Business Unit
Discipline
Service Category
Jogender Taneja
Opportunity Owner
Sonu Singal
Estimation Reviewer
Power
Jogender Taneja
Estimation Approver
Power
Opportunity Details
Risk Assessment
Proposal
Add New Team Member
Role:
Proposal coordinator
Name:
Jogender
Business Unit:
Power
Add
Action
Task
Status
Schedule Date
CreateProjectPlan
Pending
24 Sep 2013
SendManhourEstimateforRevi
Pending
24 Sep 2013
SendEffortEstimate/ Revenue
Pending
24 Sep 2013
Submit


TATA CONSULTING ENGINEERS LIMITED
Proposal Management System
Welcome Jogender Taneja
Proposal coordinator
Home
Notification
Logout
Proposal
O-PBU-052013-0154 : Jatin - 3
Opportunity Status
0%
More
Details
Team
Core Financial Attributes
Proposal Documents
Check List
Workflow Log
Add
Action
Name
Role
Business Unit
Discipline
Service Category
Jogender Taneja
Opportunity Owner
Sonu Singal
Estimation Reviewer
Power
Jogender Taneja
Proposal coordinator
Power
Jogender Taneja
Estimation Approver
Power
Showing 1 to 4 of 4 entries
Opportunity Details
Risk Assessment
Proposal
Estimation & Cost
Notice the opening of the stage "Estimation & Cost" on adding the task "Create Project Plan" for the user "Proposal Coordinator"

8.1 Project Plan

8.1.1 Path A

8.1.1.1 Add Project Plan

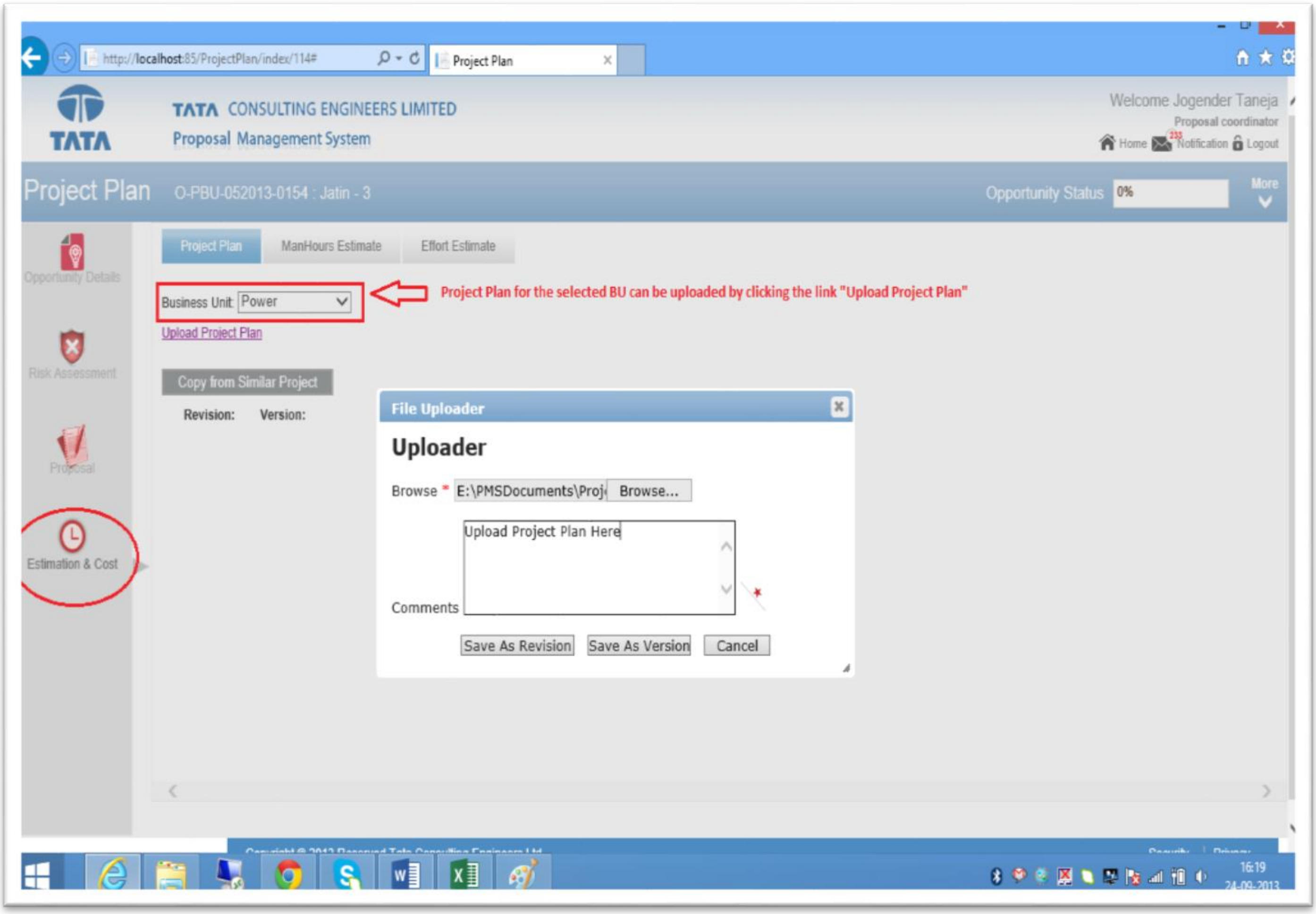
In this stage of opportunity, The Proposal Coordinator needs to upload the "Project Plan" according to different "Business Unit", "Discipline" and "Service Category". While uploading the Project Plan, he has an option to select whether he wants to save the uploaded Project Plan as a new "Version" or "Revision".

Steps to upload the new Project Plan:

Step 1: Select the "Business Unit" from the Business Unit dropdown menu

Step 2: Click the "Upload Project Plan" link for the selected Business Unit.

Step 3: Click the "Save As Revision" or "Save As Version" after selecting the Project Plan to be uploaded.



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8.1.1.2 Copy from Similar Projects

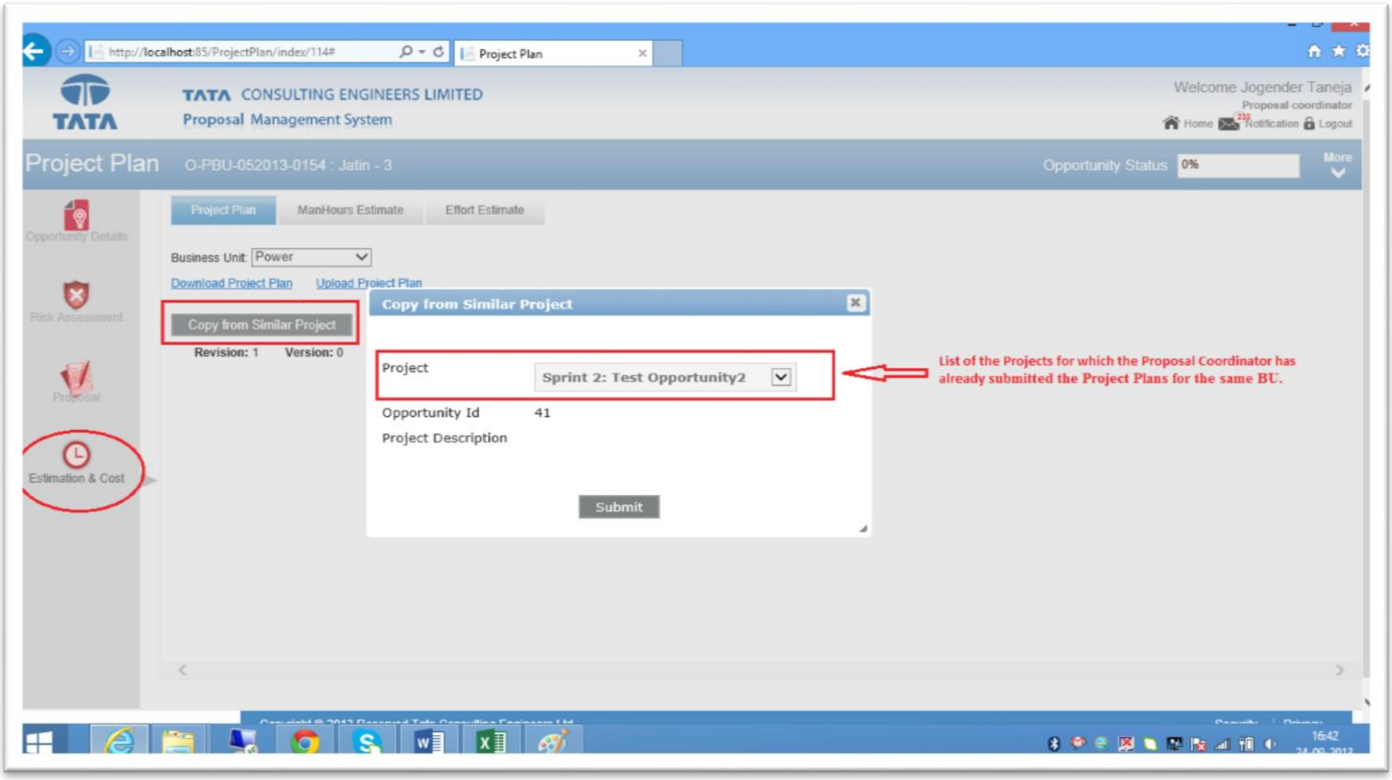
Also the Proposal Coordinator has an option to "Copy from Similar Project". On clicking the button "Copy from Similar Project", Proposal Coordinator sees the list of all the Projects for which he has already submitted the Project Plans for the same BU.

Steps to Copy from Similar Project:

Step 1: Click the "Copy from Similar Project" button from the Project Plan screen.

Step 2: Select the Project for which the Proposal Coordinator has previously uploaded the Project Plan and now wants to copy/upload the same Project Plan for the current opportunity and for the selected Business Unit.

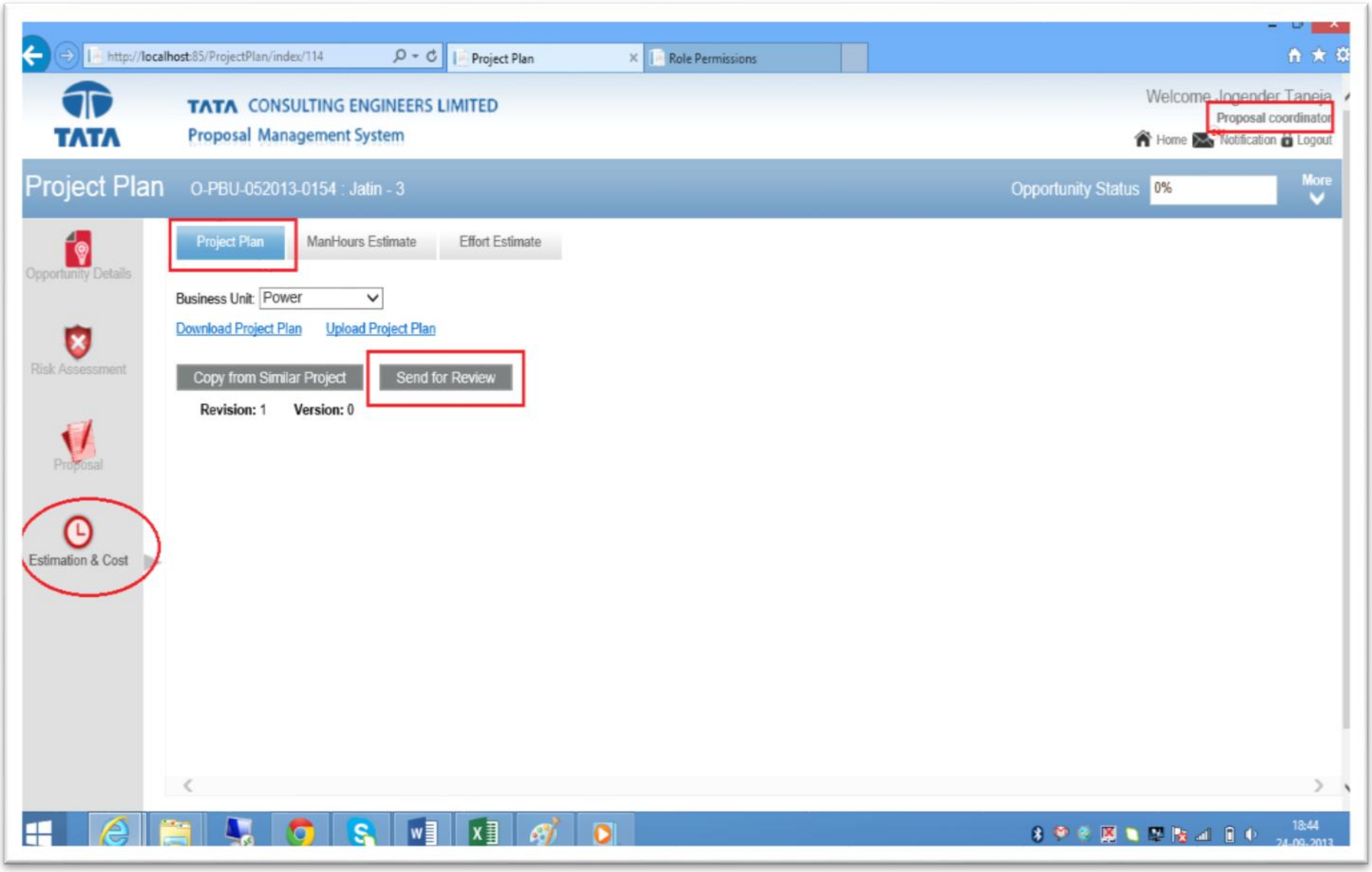
Step 3: Click the "Submit" button after selecting the Project from the Project dropdown list.



8.1.1.3 Send For Review Project Plan

After successfully uploading the Project Plan, Proposal Coordinator has an option to “Send for Review” the Project Plan to “Estimation Reviewer”.

This is a single step process. Clicking on the button “Send for Review” will send the Project Plan for review to the “Estimation Reviewer”.



8.1.2 Path B

Project Plan functionality are same for both Path A and Path B. Please refer to Path A. Only difference is that in case of Path B, Opportunity Owner himself (instead of Proposal Coordinators) can upload project plan and send it for review. Unlike Path A, Project Plan is sent directly to Estimation approver for approval directly in Path B.

8.2 Man Hours Estimate

8.2.1 Path A

8.2.1.1 Add Proposal Engineers to upload Man Hours Estimates

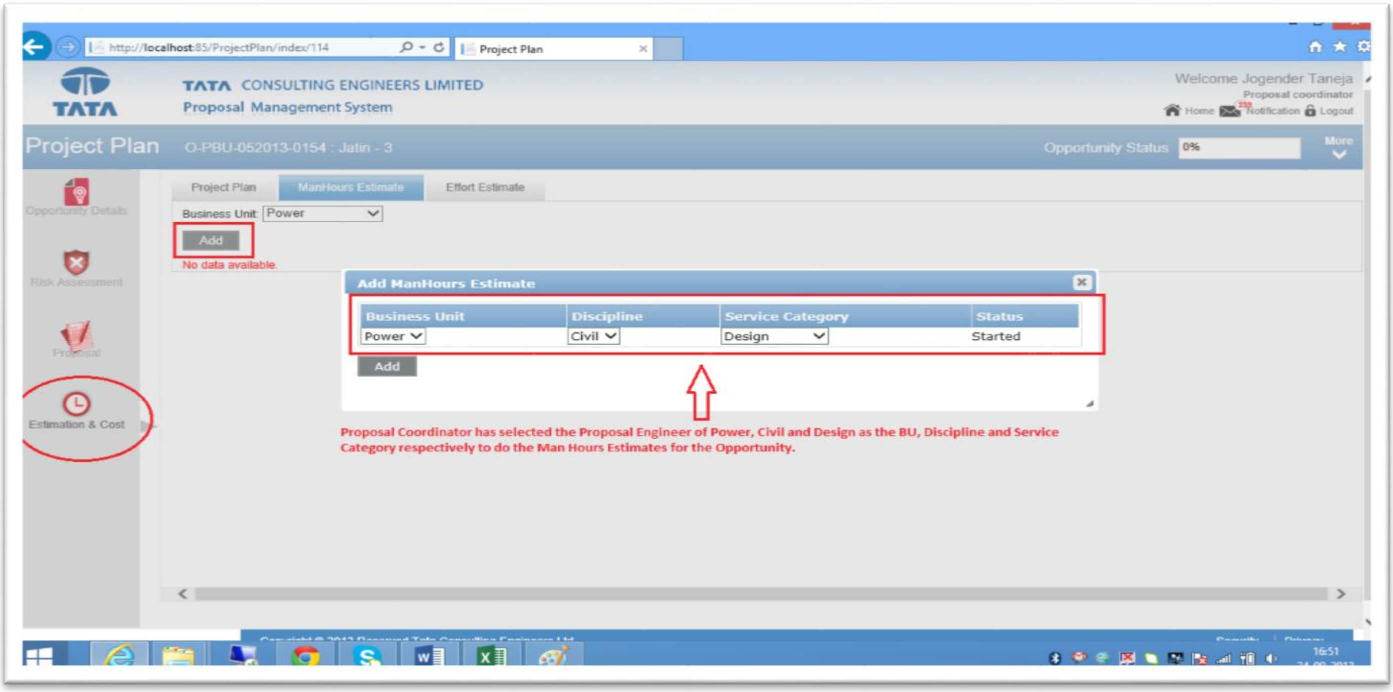
"Proposal Coordinator" can then assign the "Man Hours Estimation" items and "Effort & Other Cost" items for different "Business Unit", "Discipline" and "Service Category" to the "Proposal Engineers" of the same "Business Unit", "Discipline" and "Service Category".

Steps to Add Proposal Engineers to upload Man Hours Estimate:

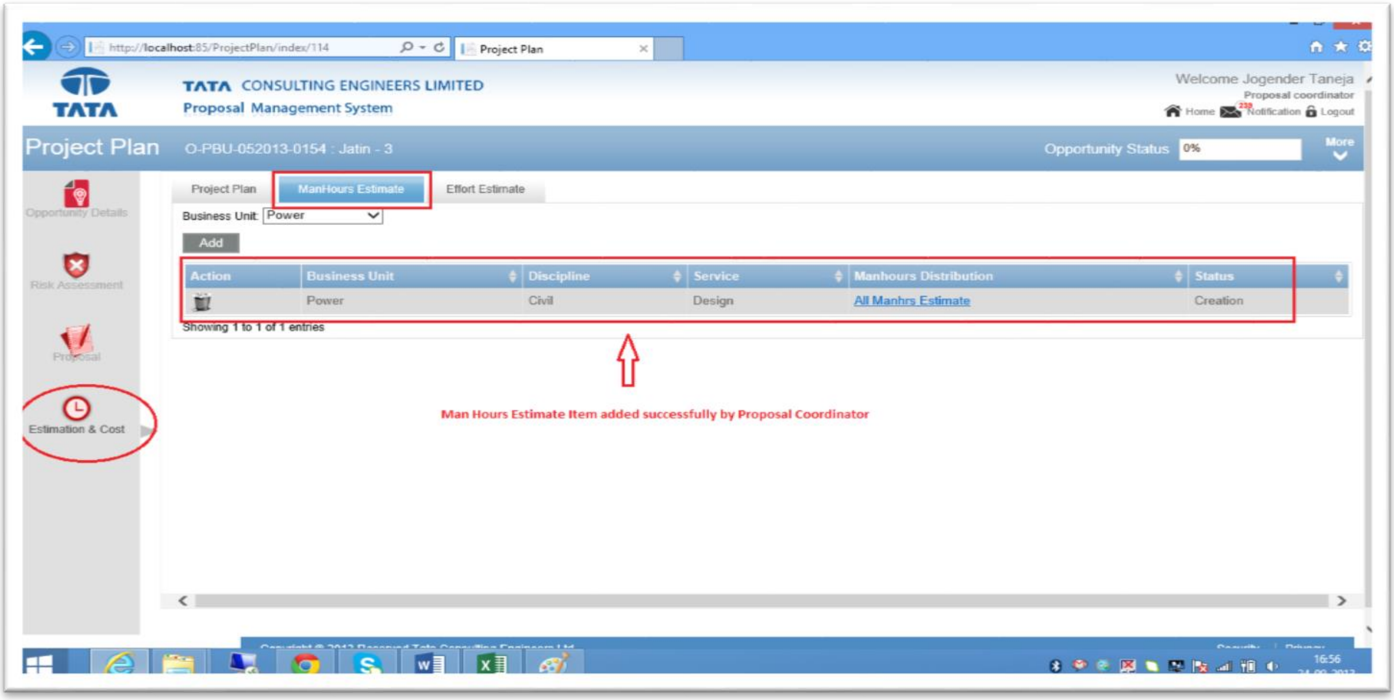
Step 1: Click on the "Add" button from the Man Hours Estimate screen.

Step 2: Select the "Business Unit", "Discipline" and "Service Category" for which the Man Hours estimates need to be done. It means that the Proposal Engineer for the selected BU, Discipline and Service Category added into the Proposal team will have to do the Man Hours Estimates for the opportunity.

Step 3: Click on the "Add" button from the "Add ManHours Estimate" popup.



Man Hours Estimate Item is added successfully by Proposal Coordinator.



8.2.1.2 Add/Upload Man Hours Estimate

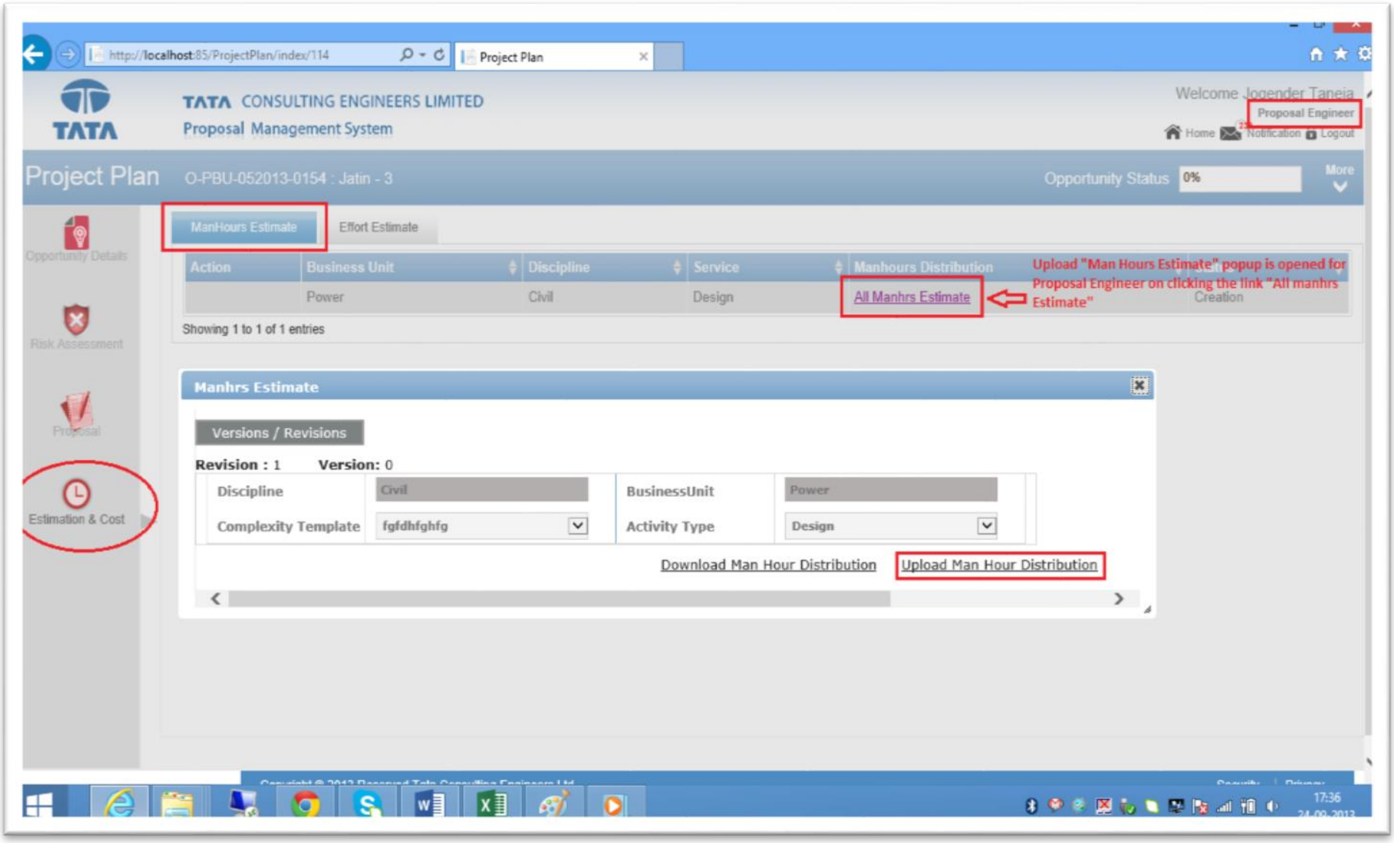
Different Proposal Engineers then need to upload the related estimations and send them for review to “Proposal Coordinators” who can then review and send them to “Estimation Reviewer” to “Approve” or “Reject”.

Steps to add Man Hours Estimate by Proposal Engineer:

Step 1: Click on the “All Manhrs Estimate” link on Man Hours Estimate screen.

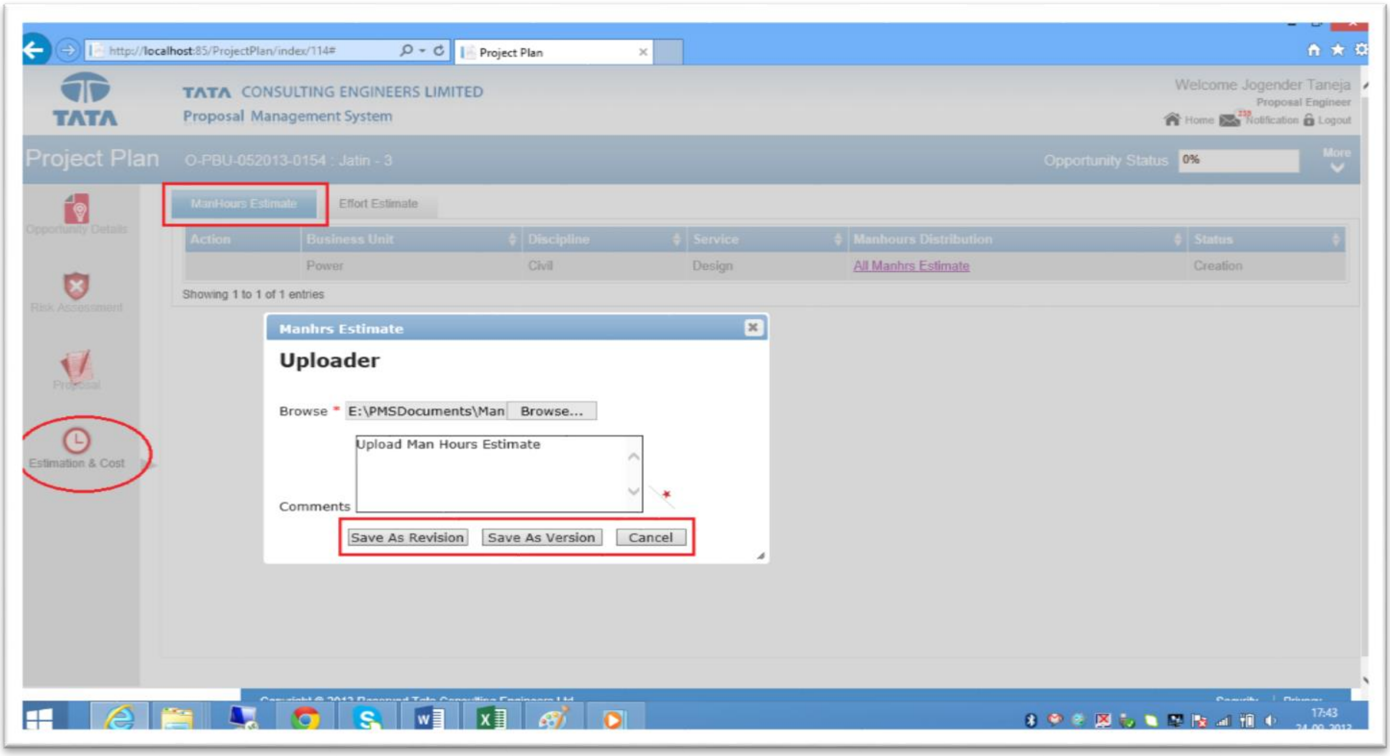
Step 2: Click on the “Man Hours Distribution” link in the opened popup.

Step 3: Click the “Save As Revision” or “Save As Version” after selecting the Man Hours Estimate document to be uploaded.

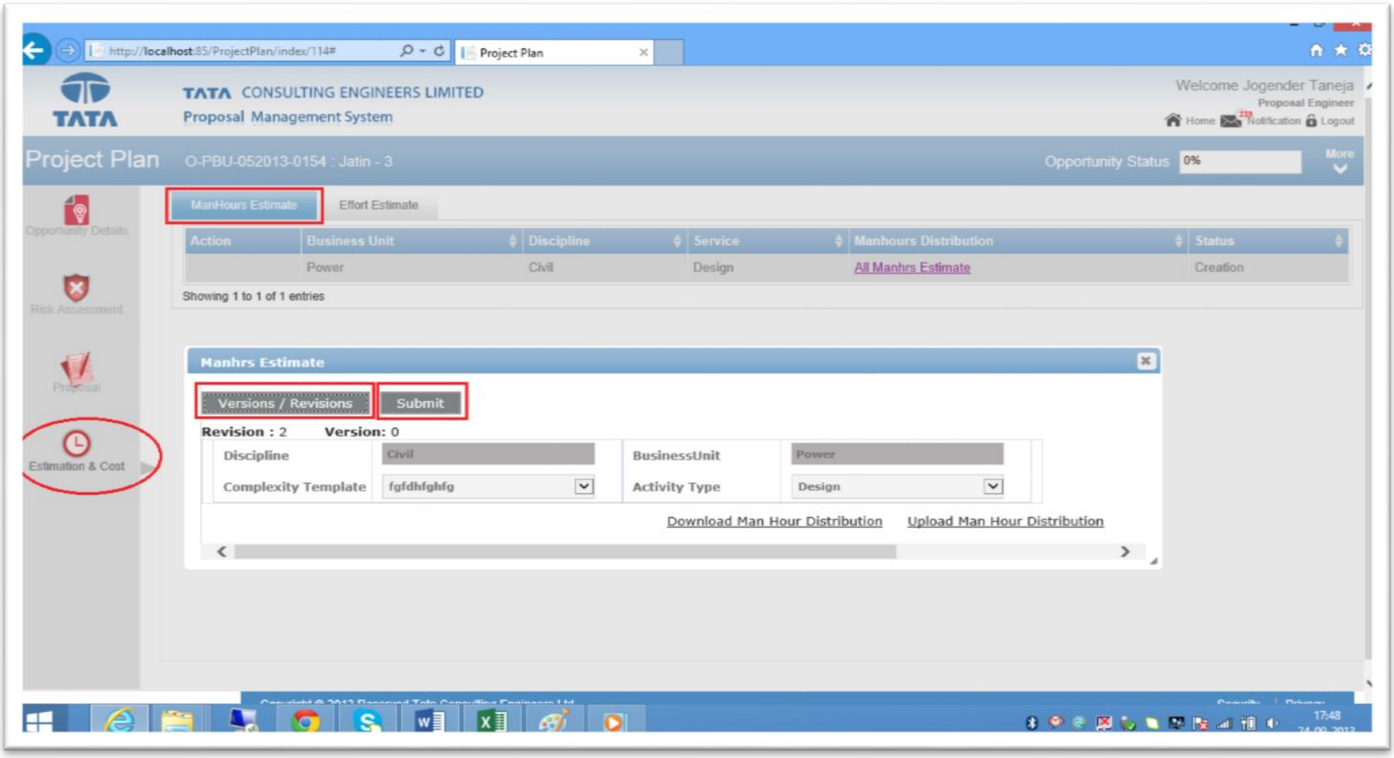

Project Plan
O-PBU-052013-0154 : Jatin - 3
Welcome Jogender Taneja
Proposal Engineer
Opportunity Status
ManHours Estimate
Effort Estimate
Action
Business Unit
Discipline
Service
Manhours Distribution
Power
Civil
Design
All Manhrs Estimate
Upload "Man Hours Estimate" popup is opened for Proposal Engineer on clicking the link "All manhrs Estimate"
Showing 1 to 1 of 1 entries
Manhrs Estimate
Versions / Revisions
Revision : 1 Version: 0
Discipline
Civil
BusinessUnit
Power
Complexity Template
fgfdhfghfg
Activity Type
Design
Download Man Hour Distribution
Upload Man Hour Distribution
Estimation & Cost

8.2.1.3 Check Version/Revision ManHours Estimate

Similar to Proposal Coordinator in Project Plan Upload, Proposal Engineer has an option to select whether he wants to save the uploaded Man Hours Estimate as a new "Version" or "Revision".



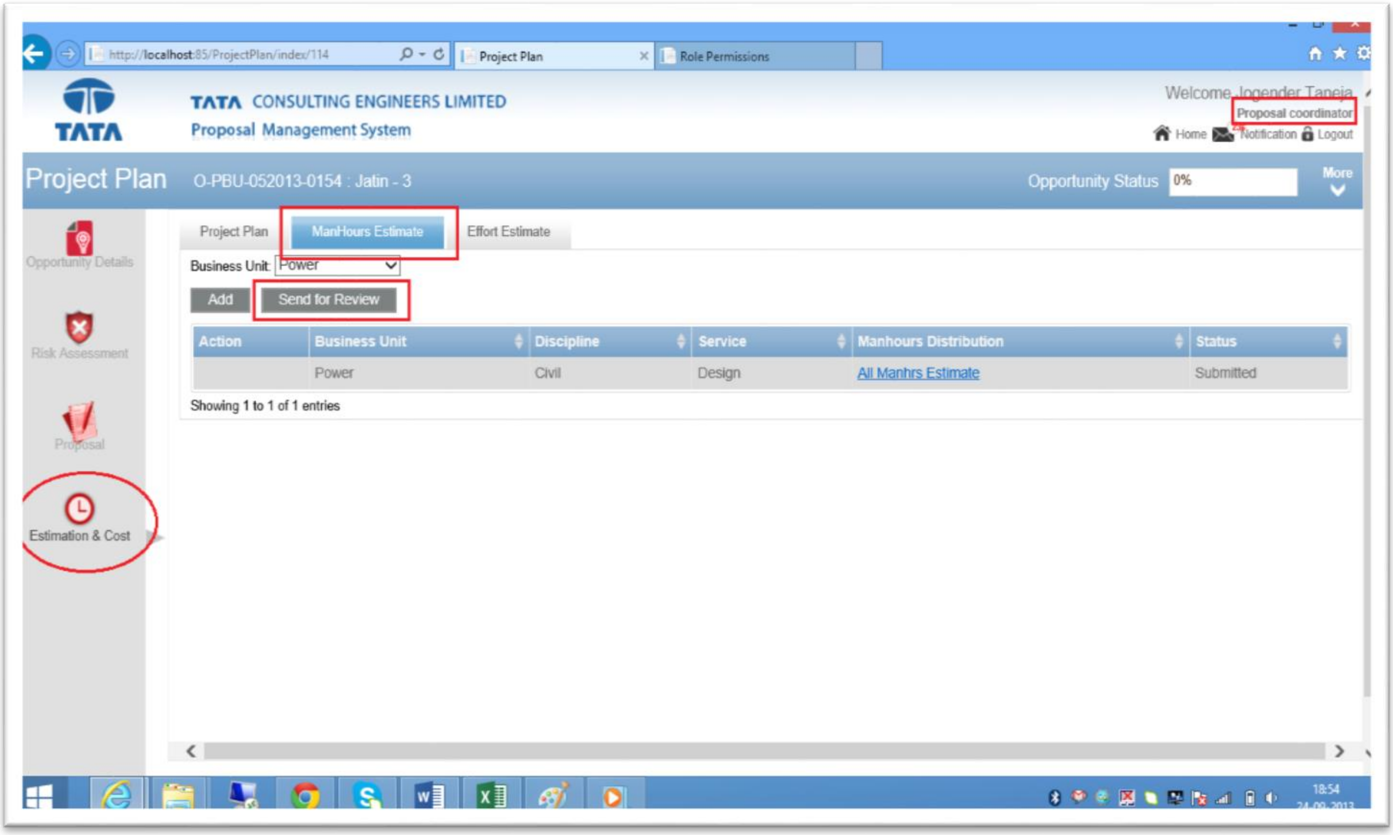
On clicking the "All ManHours Estimate" link again after uploading the same, the Proposal Engineer has an option to "Submit" the Man Hours Estimate and view the "Versions/Revisions" for the uploaded Man Hours Estimates.



8.2.1.4 Send for Review Man Hours Estimate

After the Proposal Engineer has sent the Man Hours Estimate for Review, Proposal Coordinator has the option to further "Send for Review" the Man Hours Estimate to Estimation Reviewer by following the below steps.

Step 1: Click on the "Man Hours Estimate" tab.
Step 2: Click on the "Send For Review" button. On clicking this button, the Man Hours Estimates will be sent to Estimation Reviewer for review.



8.2.2 Path B

For Path B "Opportunity Owner" can add "Man Hours Estimation" items and "Effort & Other Cost" items for different "Business Unit", "Discipline" and "Service Category". If Proposal Engineer not added then Opportunity Owner can upload or add Effort Estimate then Proposal Engineer for that effort is added automatically.

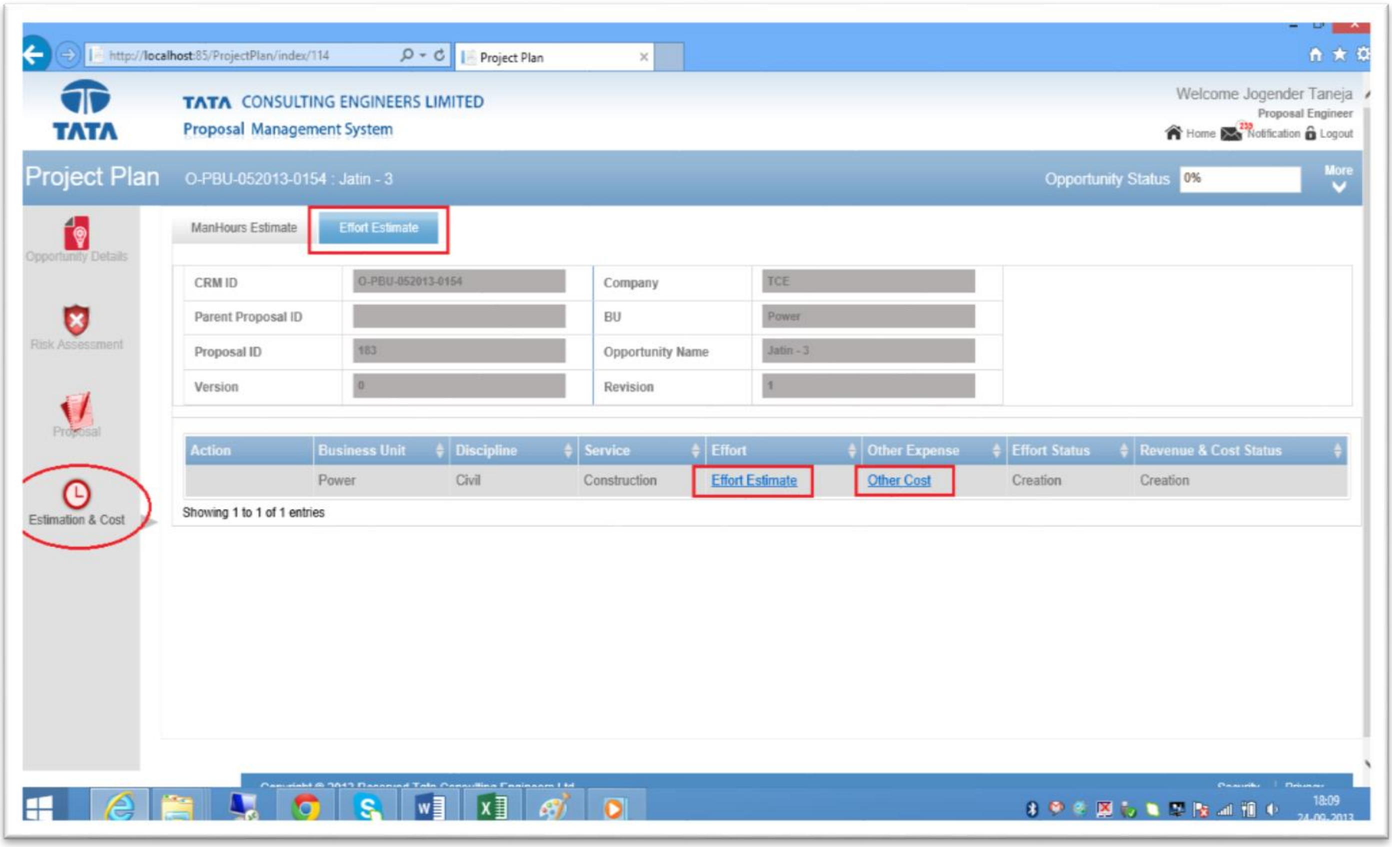
Man Hours Estimate functionality is same for both Path A and Path B. Please refer to Path A. Only differences are that in case of Path B, Opportunity Owner himself (instead of Proposal Engineers) can upload Man Hours distribution and submit it. Also Opportunity Owner himself (instead of Proposal Coordinators) can add Man Hours Estimate Items and send it for review. Unlike Path A, Man Hours Estimate is sent directly to Estimation approver for approval directly in Path B.

8.3 Effort Estimate and Other Cost

8.3.1 Path A

8.3.1.1 *Add/Upload Effort Estimate and Other Cost*

Proposal Engineer can upload the "Effort Estimate" and "Other Cost" documents by clicking the links "Effort Estimate" and "Other Cost" shown in below image. After successful upload, he will have an option to "Submit" the estimations as shown above for Man Hours Estimate.



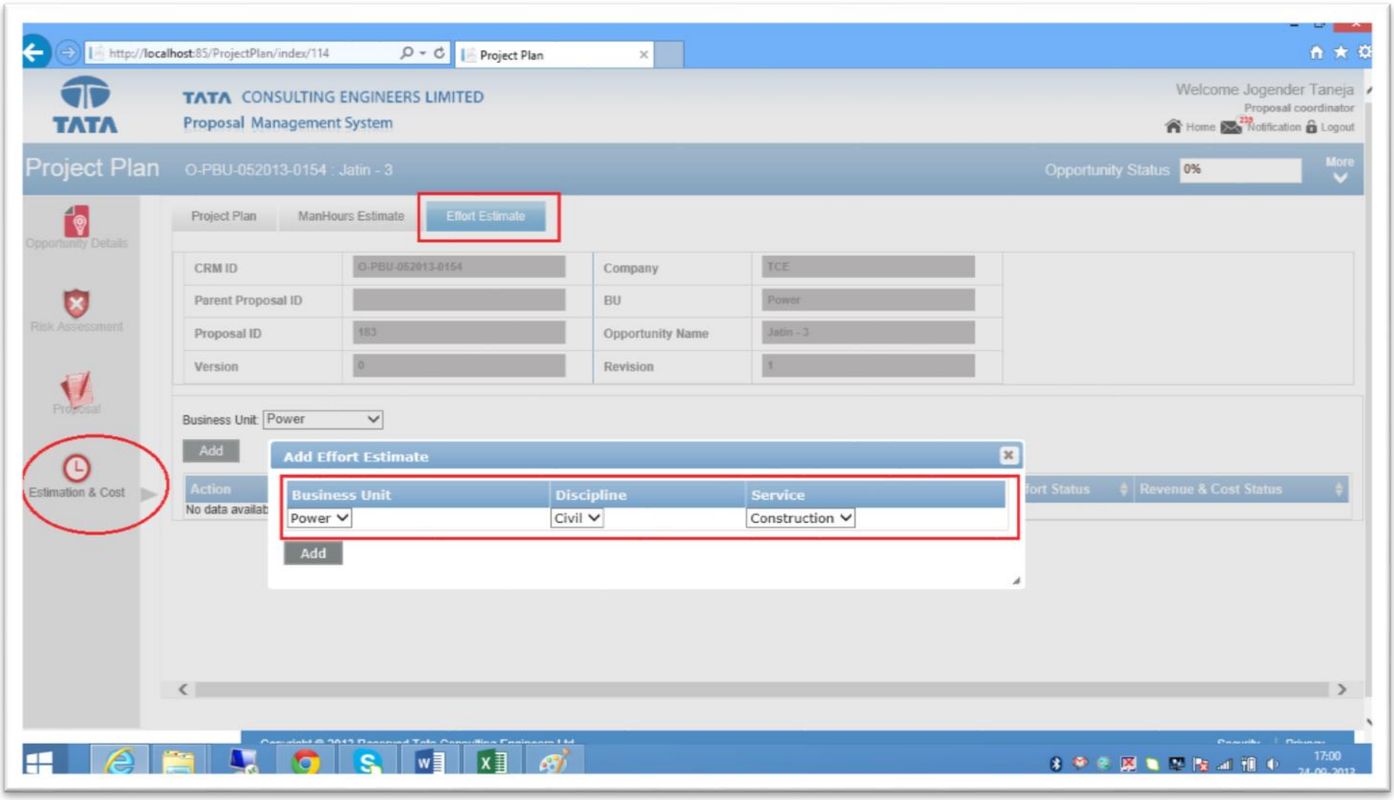
8.3.1.2 *Add Proposal Engineers to upload Effort Estimates and Other Cost*

Steps to Add Proposal Engineers to upload Effort Estimate:

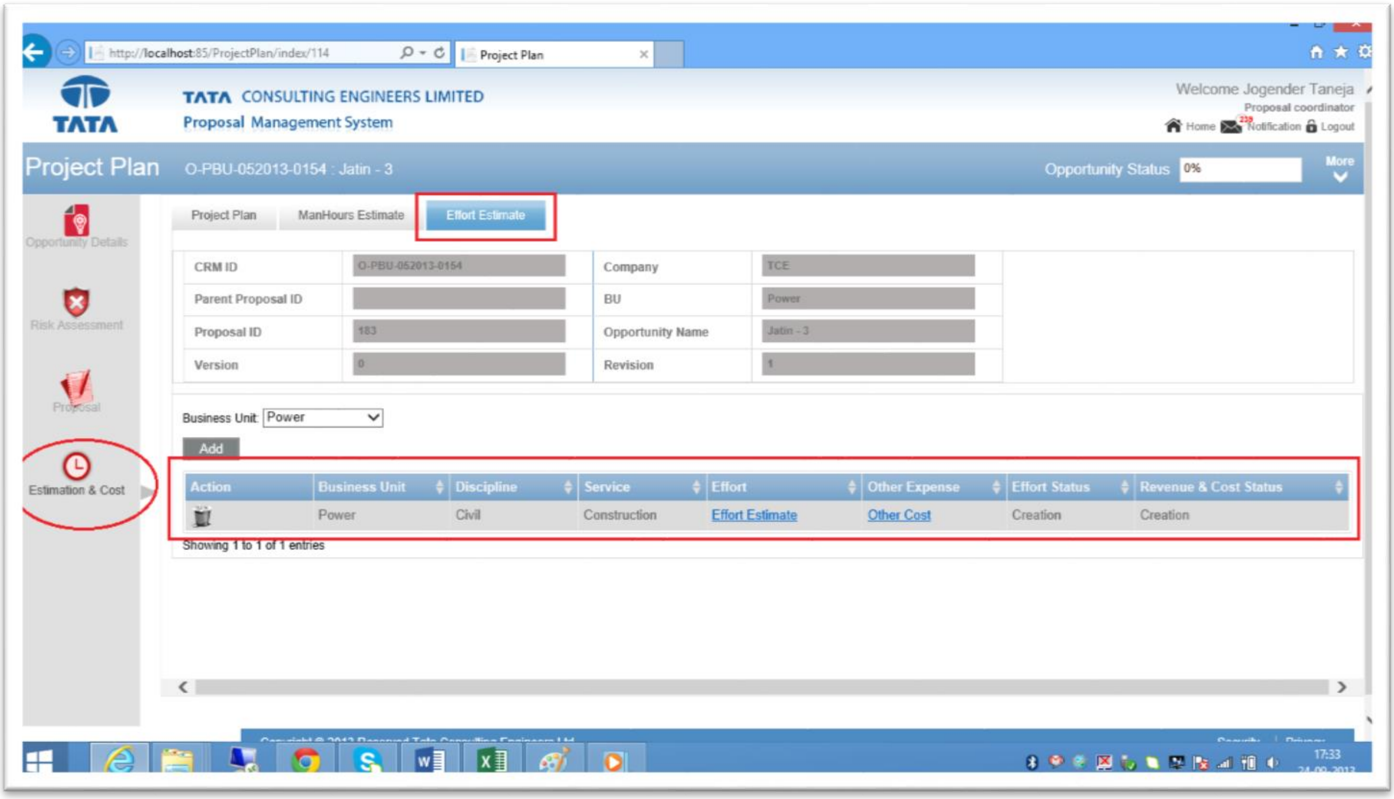
Step 1: Click on the “Add” button from the Effort Estimate screen.

Step 2: Select the “Business Unit”, “Discipline” and “Service Category” for which the Effort estimates need to be done. It means that the Proposal Engineer for the selected BU, Discipline and Service Category added into the Proposal team will have to do the Effort Estimates for the opportunity.

Step 3: Click on the “Add” button from the “Add Effort Estimate” popup.

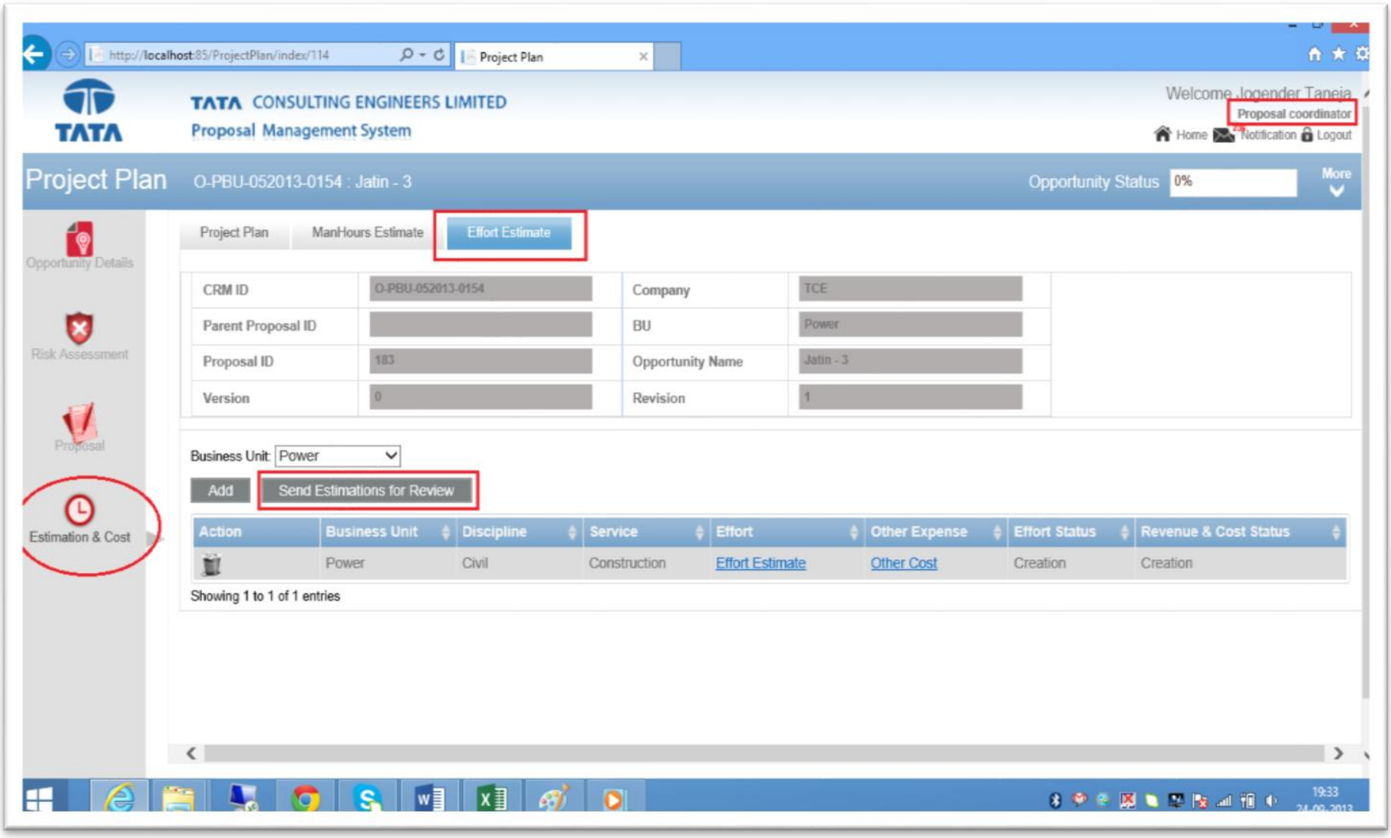


Effort Estimate Item is added successfully by Proposal Coordinator.



Send For Review Effort Estimate and Other Cost

After the Proposal Engineer has sent the Effort Estimate and Other Cost for Review like the Man Hours Estimate, Proposal Coordinator has the option to further "Send for Review" the Estimations to Estimation Reviewer.



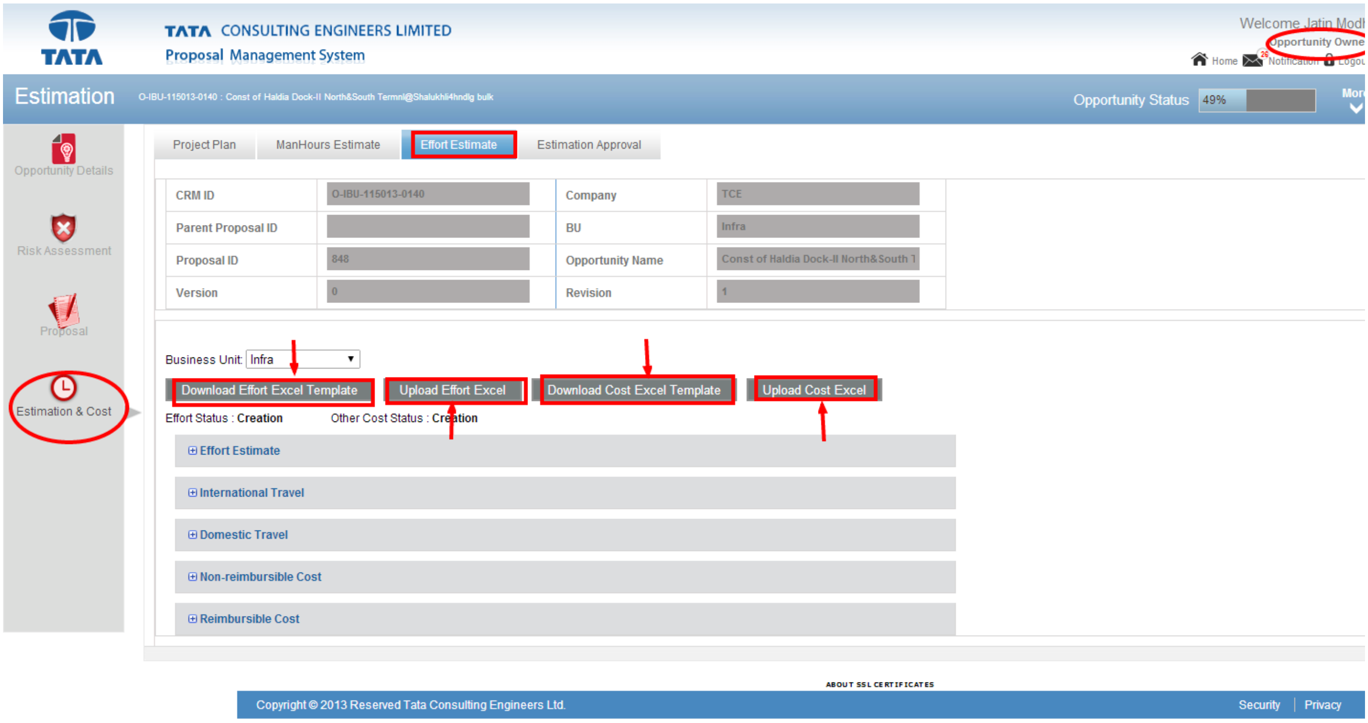
Now when Proposal Coordinator has reviewed the Estimations and sent them for further review to Estimation Reviewer, Estimation Reviewer has an option to "Approve" or "Reject" the "Man Hours Estimate", "Effort Estimate" and "Other Cost" documents.

8.3.2 Path B

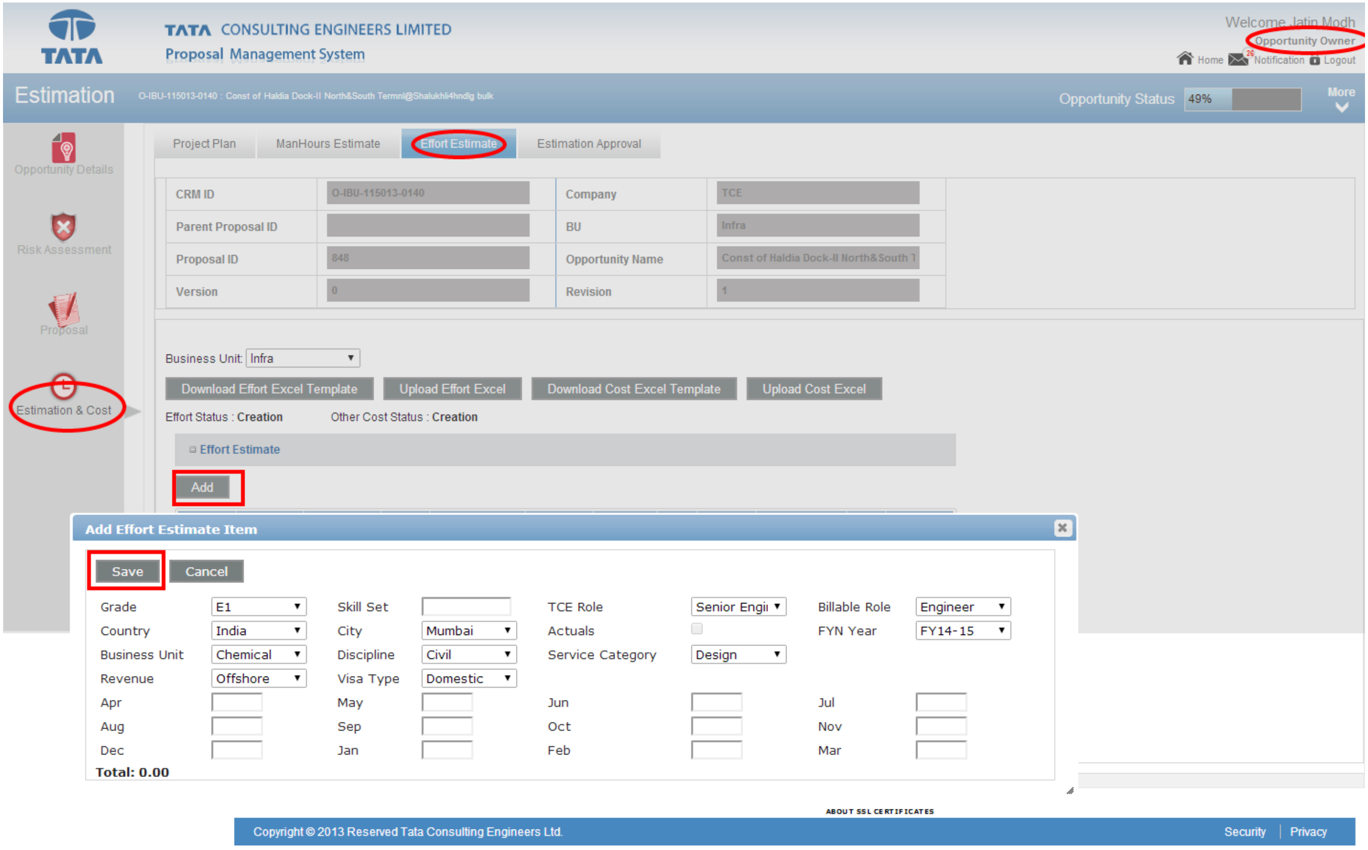
Steps to Add/Upload Effort Estimate and Other Cost

Step 1: Opportunity Owner can download the template of "Effort Estimate" and "Other Cost" by clicking the links "Download Effort Excel Template" and "Download Cost Excel Template" shown in below image.

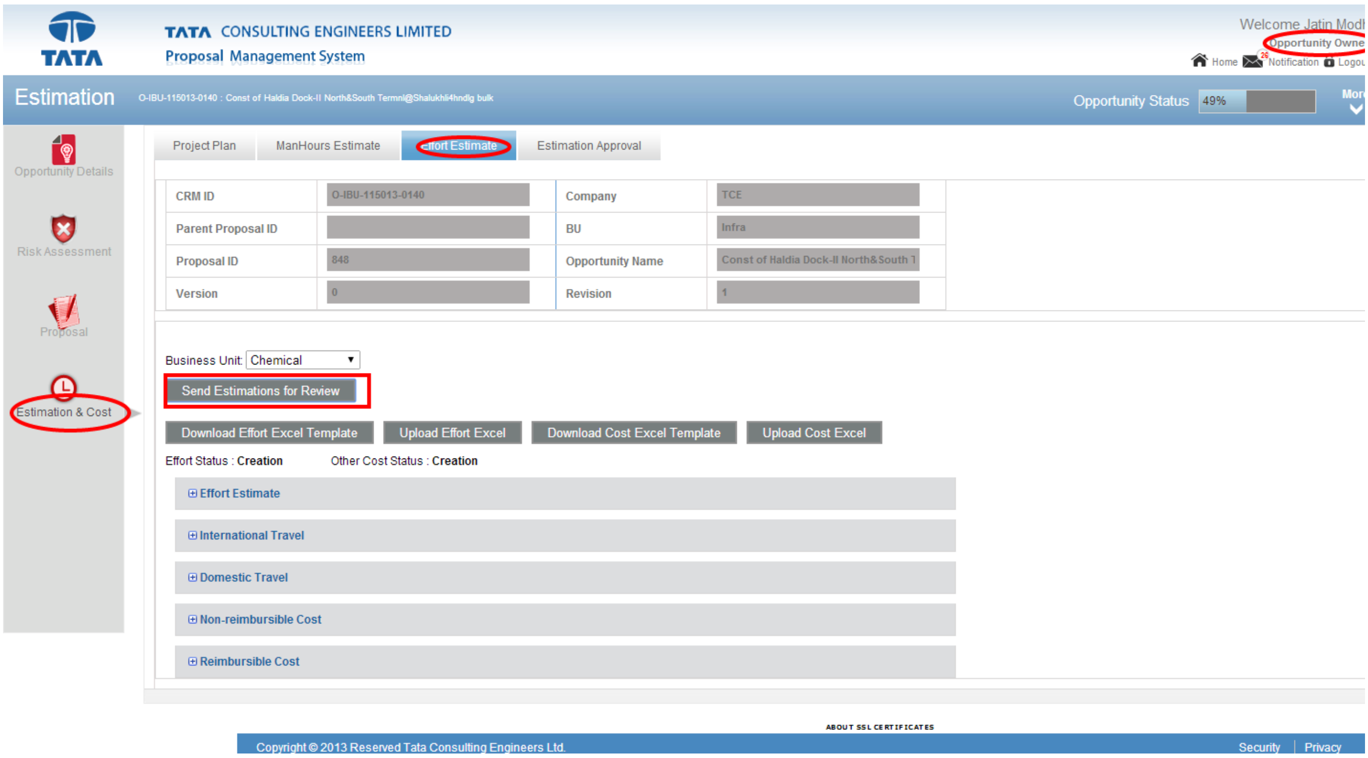
Step 2: Opportunity Owner can upload the "Effort Estimate" and "Other Cost" documents by clicking the links "Upload Effort Excel" and "Upload Cost Excel".



Step 3: Opportunity Owner can also add "Effort Estimate" and "Other Cost" by clicking the "Add" button.



Step 4: After successful upload, Opportunity Owner will have an option to "Send Estimations for Review" for selected business unit.



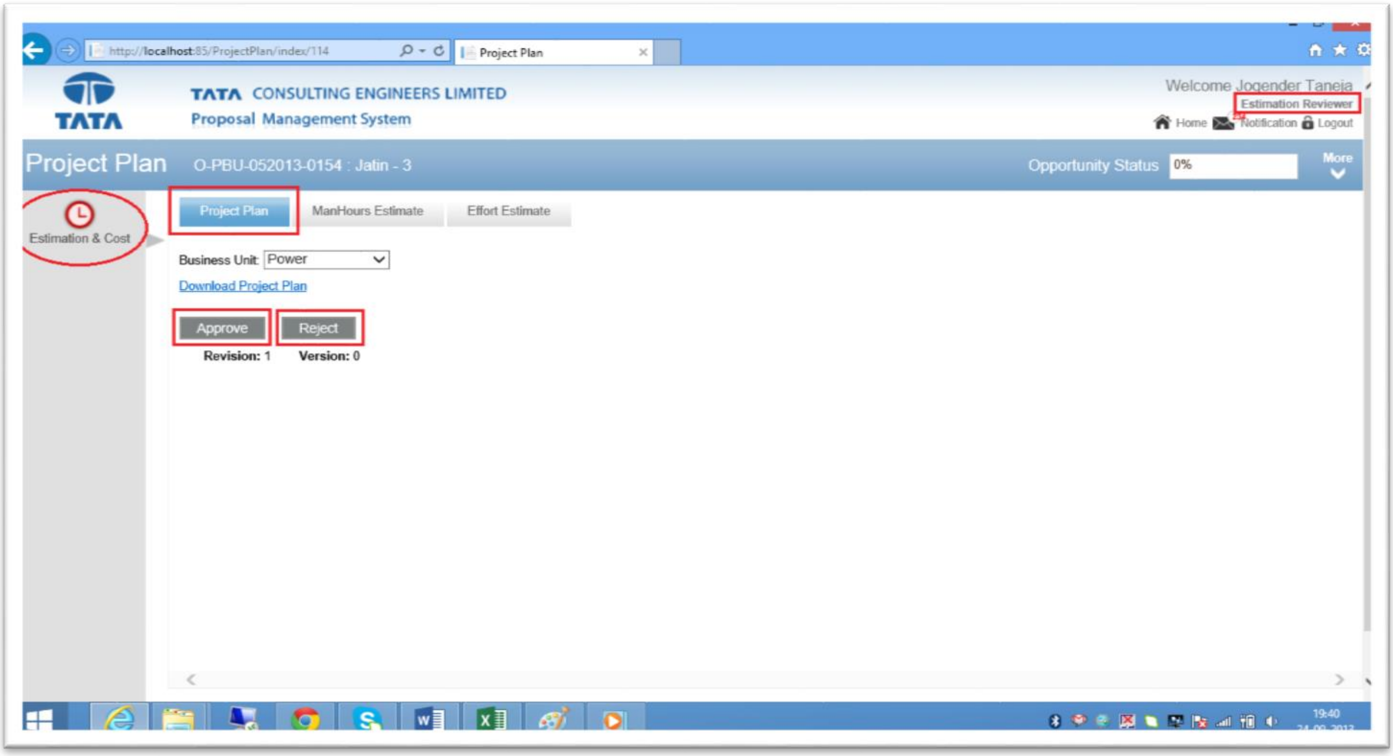
Step 5: Now when Opportunity Owner has sent Estimations for approval, It is sent directly to Estimation Approver instead of Reviewer and Approver has option to approve or Reject it.

8.4 Project Plan Approval by Estimation Reviewer

In Path A, Estimation Reviewer has the privilege to "Approve" or "Reject" the Project Plan that was sent to him for review by the Proposal Coordinator. **Steps to Approve or Reject the Project Plan by the Estimation Reviewer:**

Step 1: Click on the tab Project Plan.

Step 2: Click on the "Approve" or the "Reject" button to Approve or Reject the Project Plan.

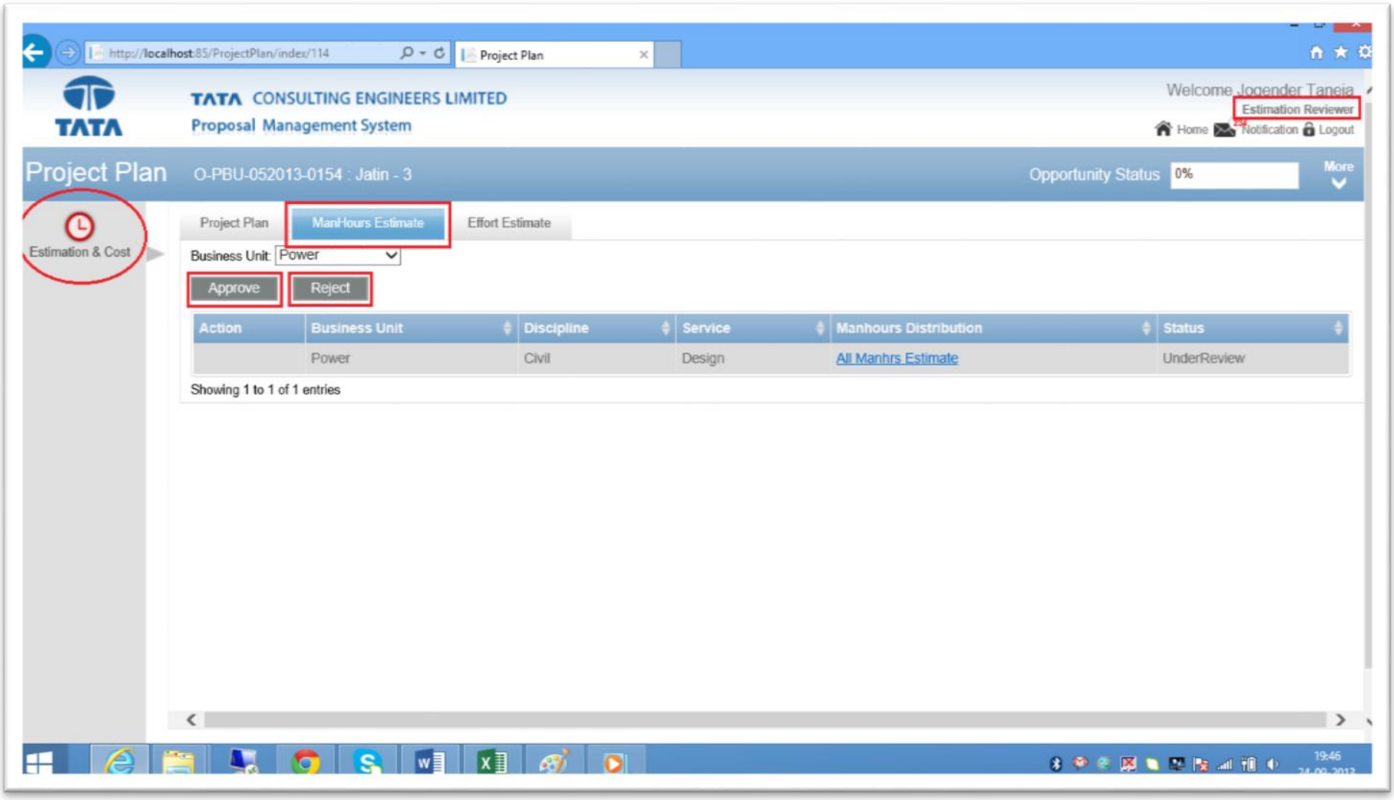


8.5 Man Hours Estimate Approval by Estimation Reviewer

In Path A, Estimation Reviewer can "Approve" or "Reject" the Man Hours Estimates that was sent to him for review by the Proposal Coordinator. **Steps to Approve or Reject the Man Hours Estimates by the Estimation Reviewer:**

Step 1: Click on the tab Man Hours Estimates.

Step 2: Click on the "Approve" or the "Reject" button to Approve or Reject the Man Hours Estimates uploaded by the Proposal Engineers.

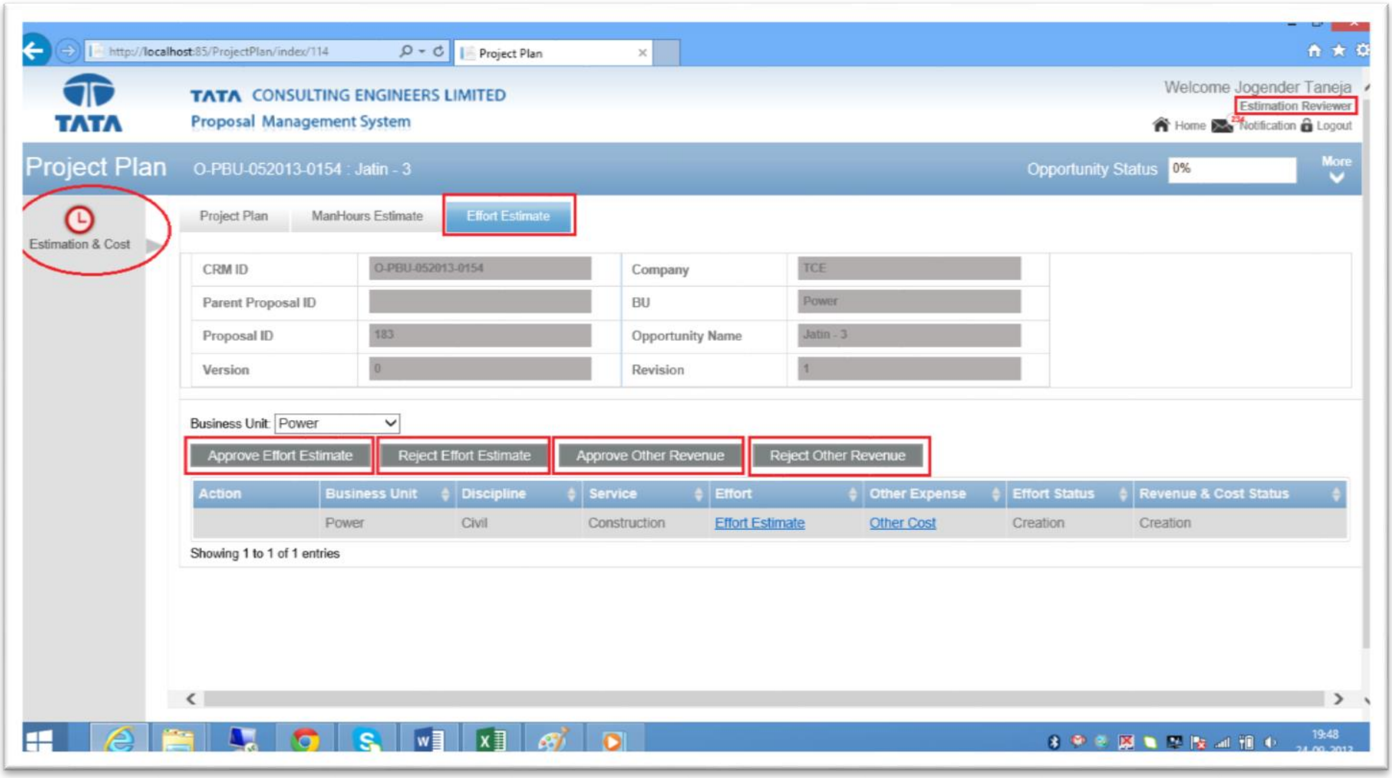


8.6 Effort Estimate and Other Cost Approval by Estimation Reviewer

Estimation Reviewer can "Approve" or "Reject" the Effort Estimate and Other Cost by following these steps:

Step 1: Click on the tab Effort Estimate.

Step 2: Click on the "Approve Effort Estimate" or the "Reject Effort Estimate" button to Approve or Reject the Effort Estimates uploaded by the Proposal Engineers.
Similarly, click on the "Approve Other Revenue" and "Reject Other Revenue" to Approve or Reject the Other costs and revenue document uploaded by the Proposal Engineers.



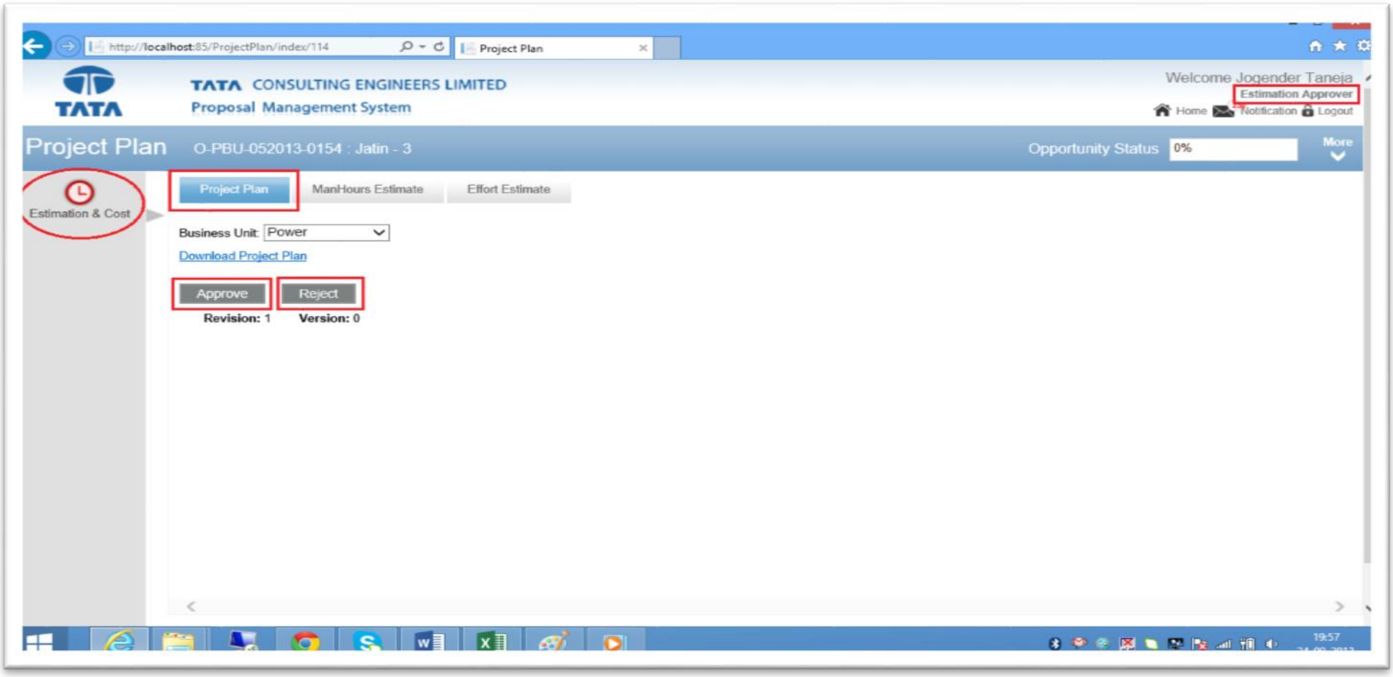
After the Estimation Reviewer has "Approved" all the documents, the Estimation Approver for the opportunity has an option to "Approve" or "Reject" the "Man Hours Estimate", "Effort Estimate" and "Other Cost" documents already reviewed by Estimation Reviewer.

8.7 Project Plan Approval by Estimation Approver

Similar to Estimation Reviewer, Estimation Approver also has the privilege to "Approve" or "Reject" the Project uploaded by the Proposal Coordinator. **Steps to Approve or Reject the Project Plan by the Estimation Approver:**

Step 1: Click on the tab Project Plan.

Step 2: Click on the "Approve" or the "Reject" button to Approve or Reject the Project Plan.

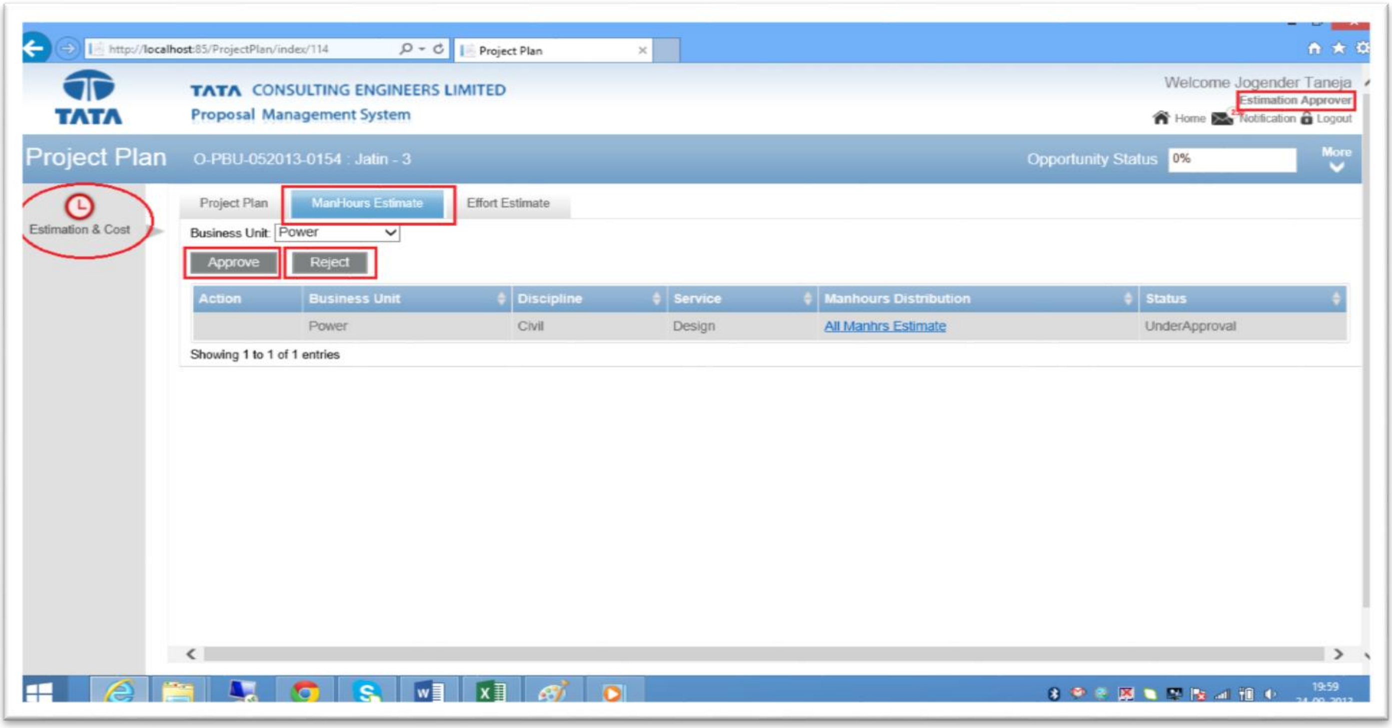


8.8 Man Hours Estimate Approval by Estimation Approver

Estimation Approver can "Approve" or "Reject" the Man Hours Estimates already reviewed by Estimation Reviewer. **Steps to Approve or Reject the Man Hours Estimates by the Estimation Approver:**

Step 1: Click on the tab Man Hours Estimates.

Step 2: Click on the "Approve" or the "Reject" button to Approve or Reject the Man Hours Estimates uploaded by the Proposal Engineers and already reviewed by the Estimation Reviewer.



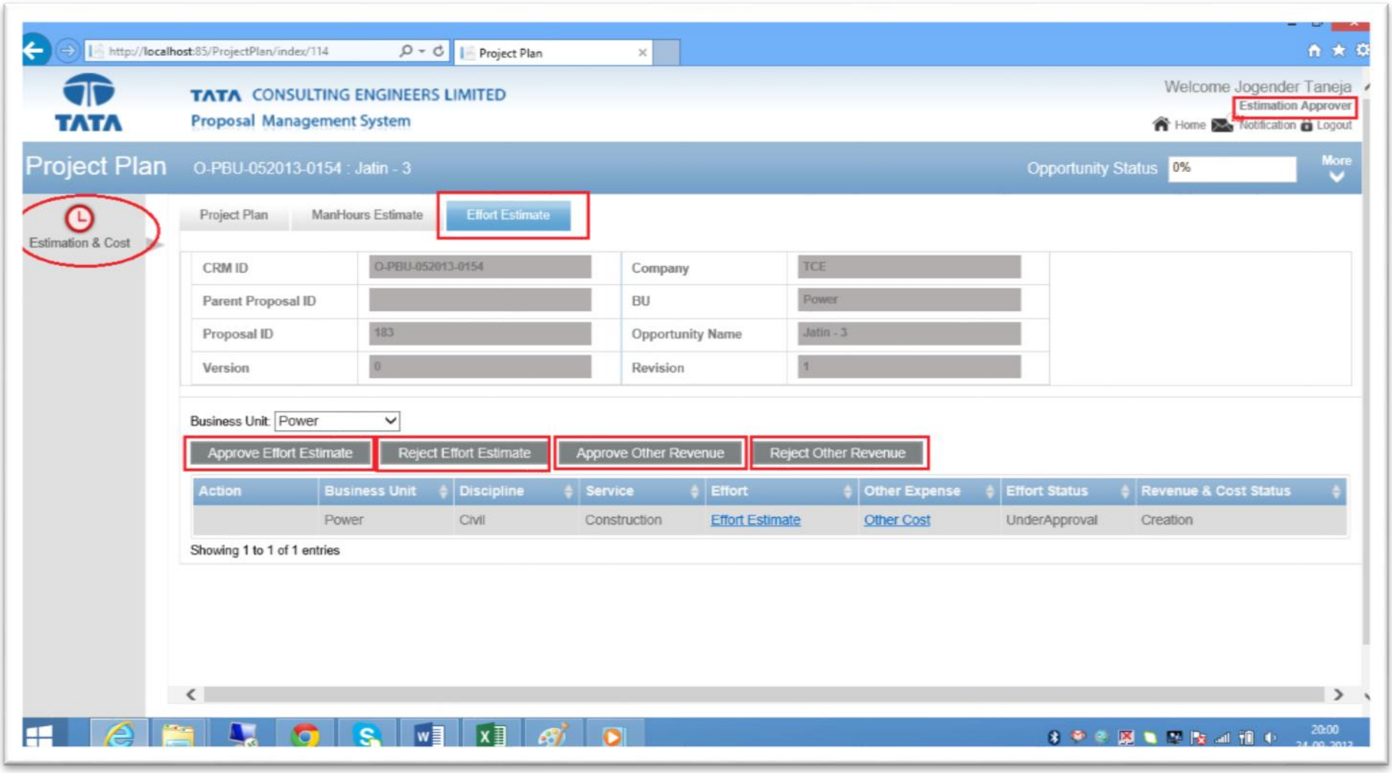
8.9 Effort Estimate and Other Cost Approval by Estimation Approver

Estimation Approver can “Approve” or “Reject” the Effort Estimate and Other Cost by following these steps:

Step 1: Click on the tab Effort Estimate.

Step 2: Click on the “Approve Effort Estimate” or the “Reject Effort Estimate” button to Approve or Reject the Effort Estimates uploaded by the Proposal Engineers and reviewed by Estimation Reviewer.

Similarly, click on the "Approve Other Revenue" and "Reject Other Revenue" to Approve or Reject the Other costs and revenue document uploaded by the Proposal Engineers.



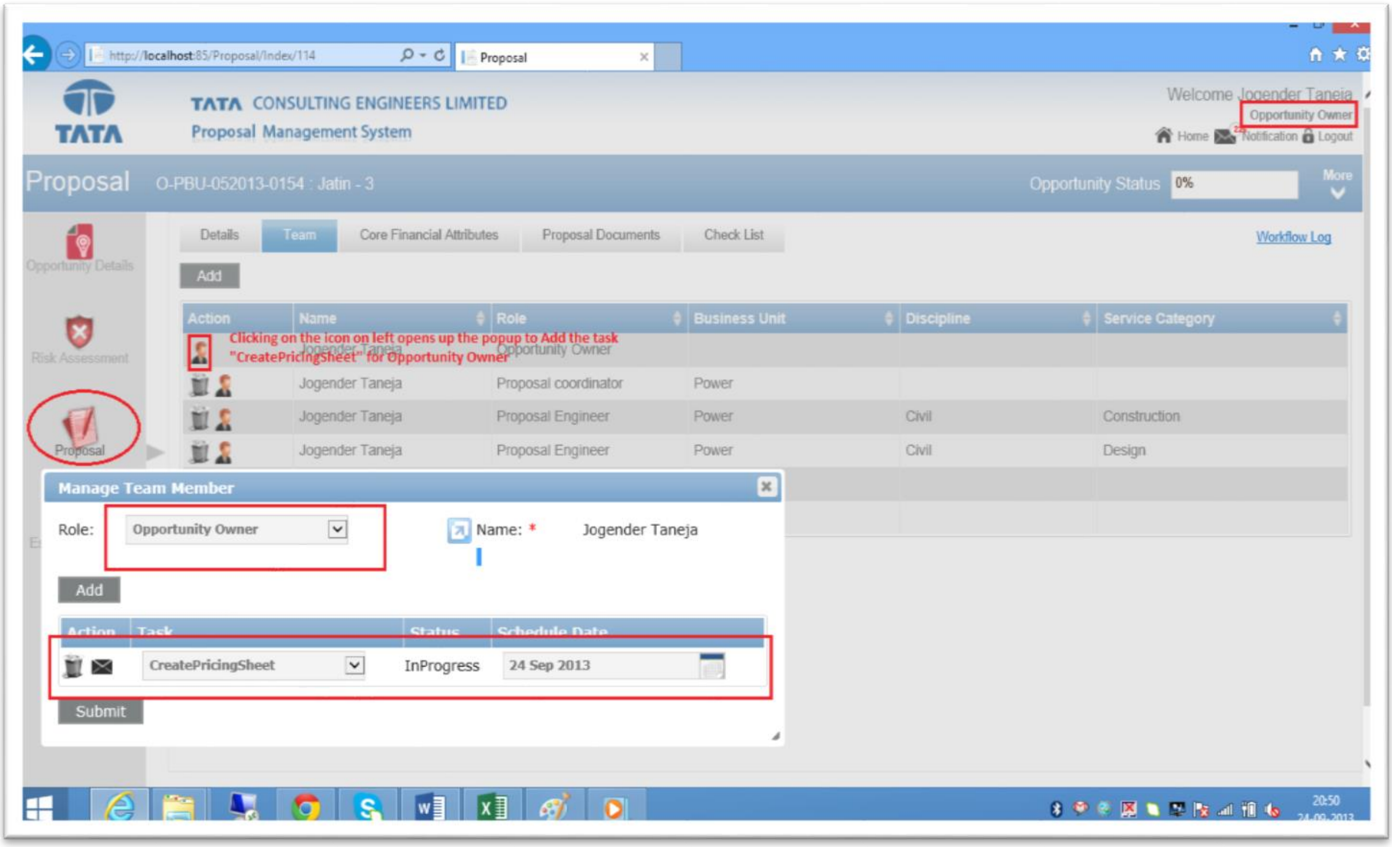
If the Estimation Reviewer or the Estimation Approver rejects the Estimations provided by different Proposal Engineers, the same cycle of doing the estimations has to be repeated unless the estimations are approved by Estimation Reviewer and the Estimation Approver.

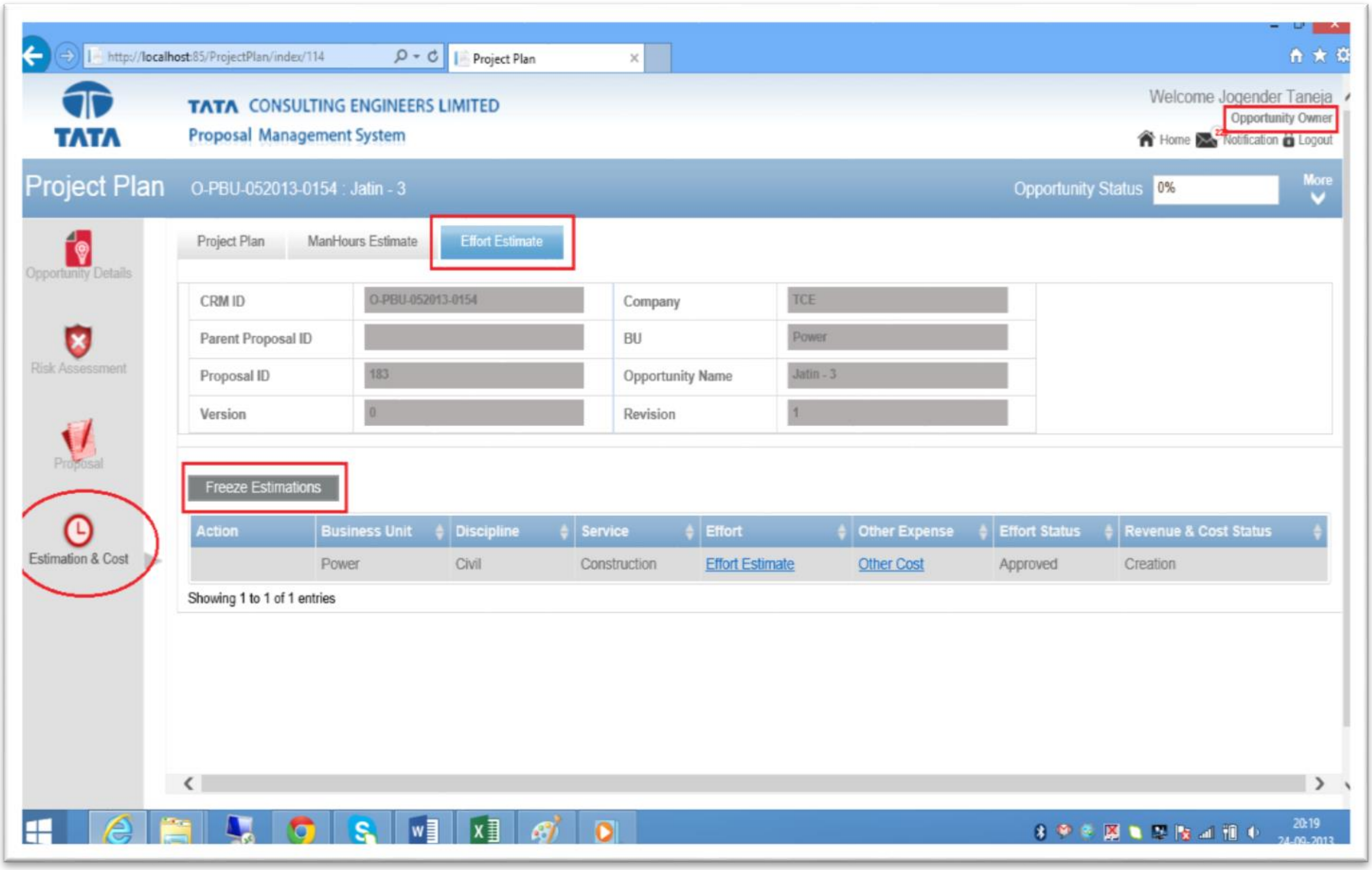
8.10 Freeze Estimations

After all the tasks assigned to different users in Proposal Team are completed and all the Estimations are Approved/Rejected by Estimation Reviewer and the Estimation Approver, Opportunity Owner has an option to "Freeze Estimations" and no further changes can be made to the Estimations after Opportunity Owner has freezed the estimations. Adding the task "Create Pricing Sheet" in Proposal Team tasks for Opportunity Owner and clicking "Freeze Estimations" button by Opportunity Owner triggers the starting of next stage "Pricing".

Steps to open the Pricing stage:

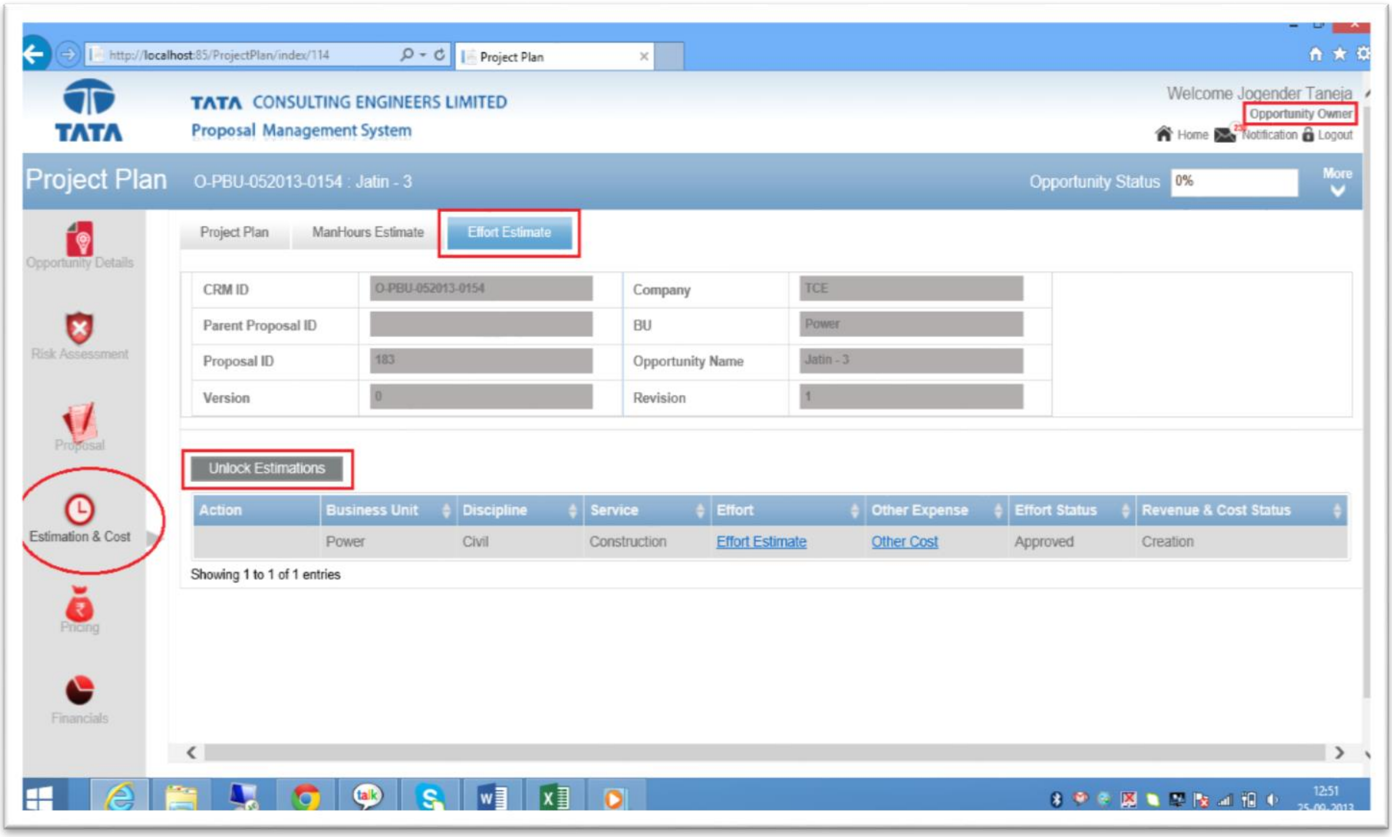
Step 1: Login as "Opportunity Owner" and click on the "Team" tab in Proposal.
Step 2: Add the task "Create Pricing Sheet" for Opportunity Owner from the Manage team member popup screen.
Step 3: Click on the "Effort Estimate" tab from the left navigation "Estimation & Cost" screen.
Step 4: Click on the "Freeze Estimations" button.


http://localhost:85/Proposal/Index/114
Proposal
TATA CONSULTING ENGINEERS LIMITED
Proposal Management System
Welcome Jogender Taneja
Opportunity Owner
Home Notification Logout
Proposal O-PBU-052013-0154 : Jatin - 3
Opportunity Status 0%
More
Opportunity Details
Risk Assessment
Proposal
Details Team Core Financial Attributes Proposal Documents Check List
Workflow Log
Add
Action Name Role Business Unit Discipline Service Category
Clicking on the icon on left opens up the popup to Add the task "CreatePricingSheet" for Opportunity Owner
Jogender Taneja Opportunity Owner
Jogender Taneja Proposal coordinator Power
Jogender Taneja Proposal Engineer Power Civil Construction
Jogender Taneja Proposal Engineer Power Civil Design
Manage Team Member
Role: Opportunity Owner
Name: * Jogender Taneja
Add
Action Task Status Schedule Date
CreatePricingSheet InProgress 24 Sep 2013
Submit


http://localhost:85/ProjectPlan/index/114
Project Plan
TATA CONSULTING ENGINEERS LIMITED
Proposal Management System
Welcome Jogender Taneja
Opportunity Owner
Home Notification Logout
Project Plan O-PBU-052013-0154 : Jatin - 3
Opportunity Status 0%
More
Opportunity Details
Risk Assessment
Proposal
Estimation & Cost
Project Plan ManHours Estimate Effort Estimate
CRM ID O-PBU-052013-0154
Company TCE
Parent Proposal ID
BU Power
Proposal ID 183
Opportunity Name Jatin - 3
Version 0
Revision 1
Freeze Estimations
Action Business Unit Discipline Service Effort Other Expense Effort Status Revenue & Cost Status
Power Civil Construction Effort Estimate Other Cost Approved Creation
Showing 1 to 1 of 1 entries

8.11 Unlock Estimations

After the Opportunity Owner has freezed the estimations, he has option to “Unlock Estimations" under the tab "Effort Estimate". He can use this button in case he needs to make some modifications in estimations during Pricing.



8.12 Technical Write up Documents

Proposal Coordinator for each BU need to upload the technical write-up documents related to the Project Plan and Estimations for approval to the HOD of the Lead BU, who then in turn can have the privilege to "Approve" or "Reject" the documents.

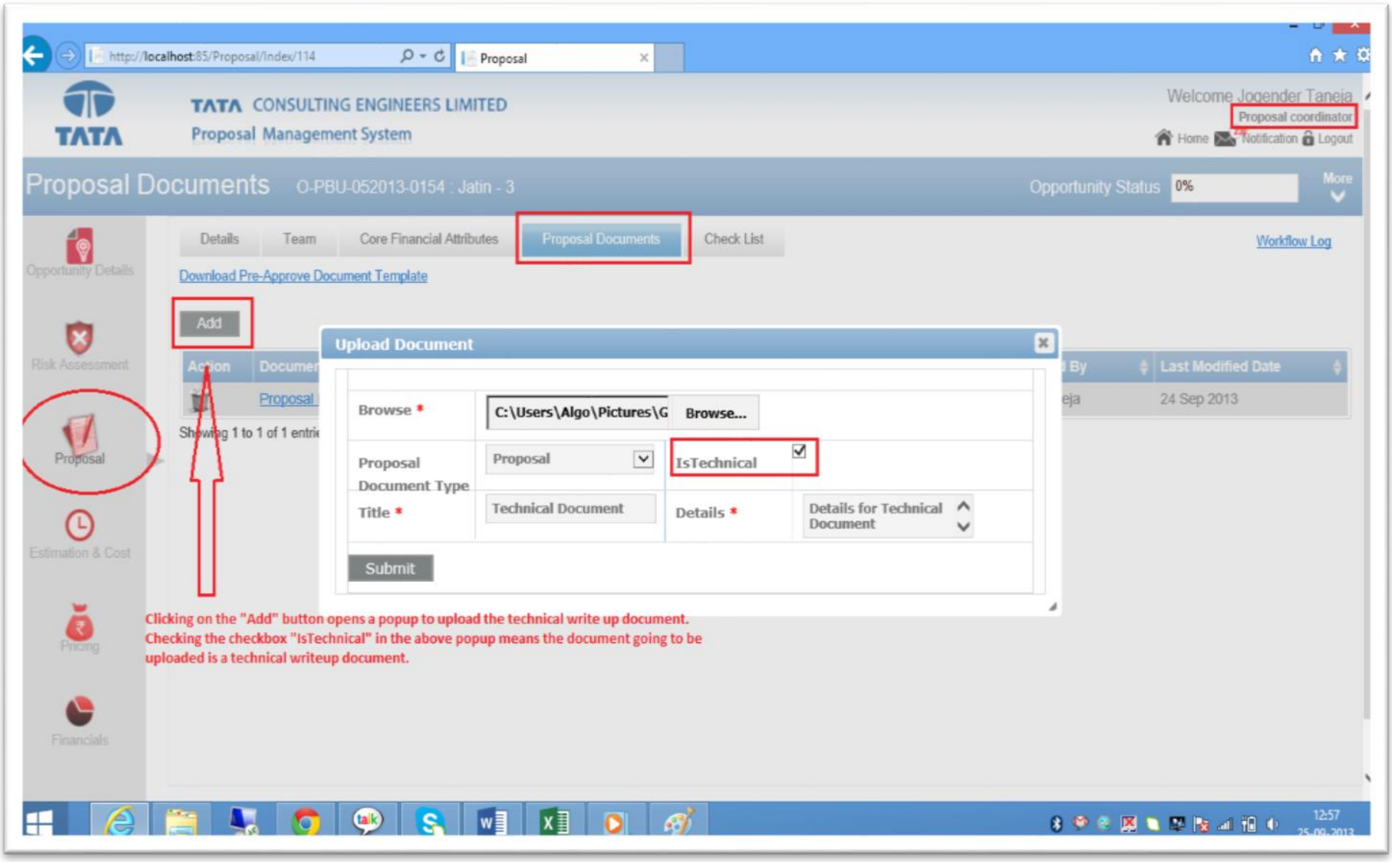
Steps to add "Technical Write up Documents"

Step 1: Click on the "Add" button from the "Proposal Documents" tab in left navigation link "Proposal".

Step 2: Browse for the document to be uploaded in the opened popup.

Step 3: Check the "Is Technical" checkbox if the document to be uploaded is a technical document.

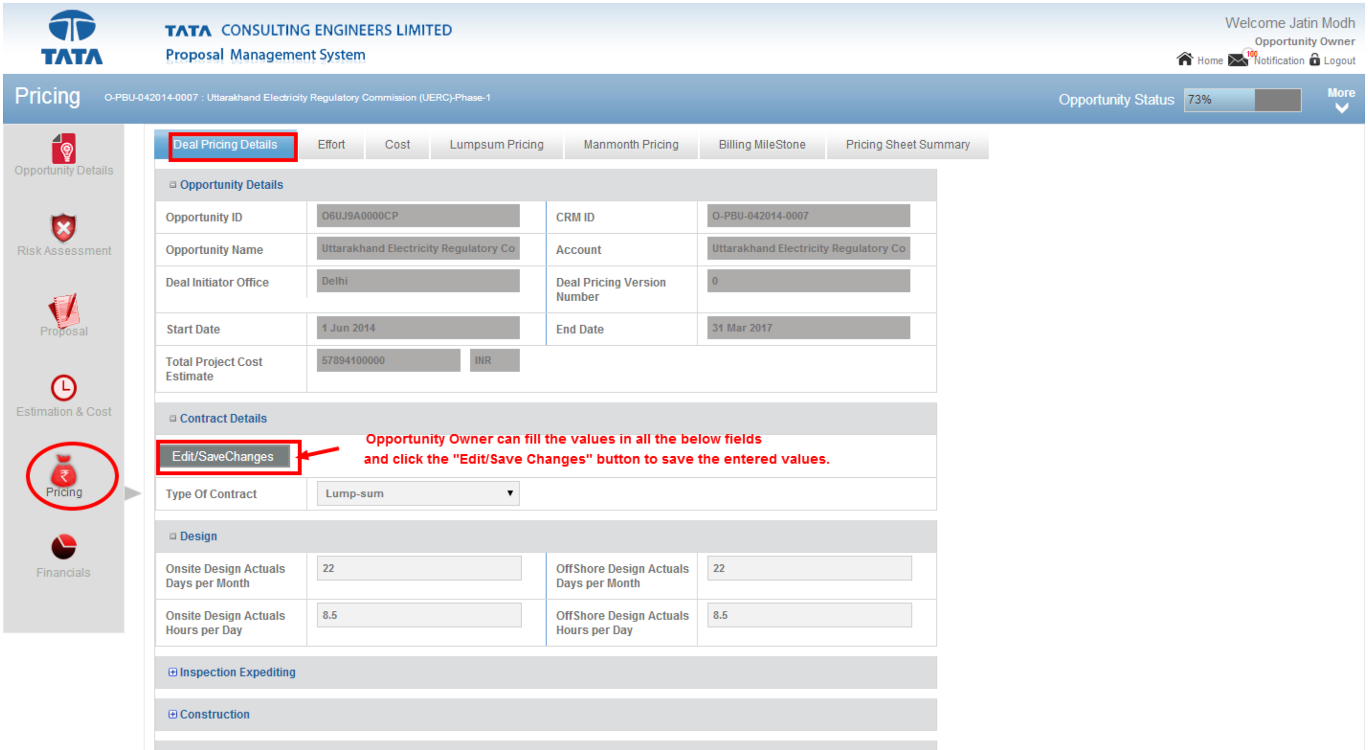
Step 4: Click on the "Submit" button.



9 STAGE 5: PRICING

9.1 Deal Pricing Details

On clicking the "Pricing" icon from the left navigation takes the user on the "Deal Pricing Details" screen. Opportunity Owner can add/update the values for "Onsite Design Billable Days per Month ", "Onsite Design Billable Hours per Day", "Offshore Design Billable Days per Month", "Offshore Design Billable Hours per Day" and the similar values for service type "Construction" and “Inspection Expenditing”. He can also set up the values for "Discount on Onsite Rate" and "Discount on Offshore Rate" under the “Other Pricing parameters”section. Also he can define whether the service types are "Taxable" or not ,use “Predefine Domestic Rate” or not and use “Predefine International Rate” or not .



Onsite Inspection Expediting Actuals Days per Month	22	OffShore Inspection Expediting Actuals Days per Month	22
Onsite Inspection Expediting Actuals Hours per Day	8.5	OffShore Inspection Expediting Actuals Hours per Day	8.5

Construction

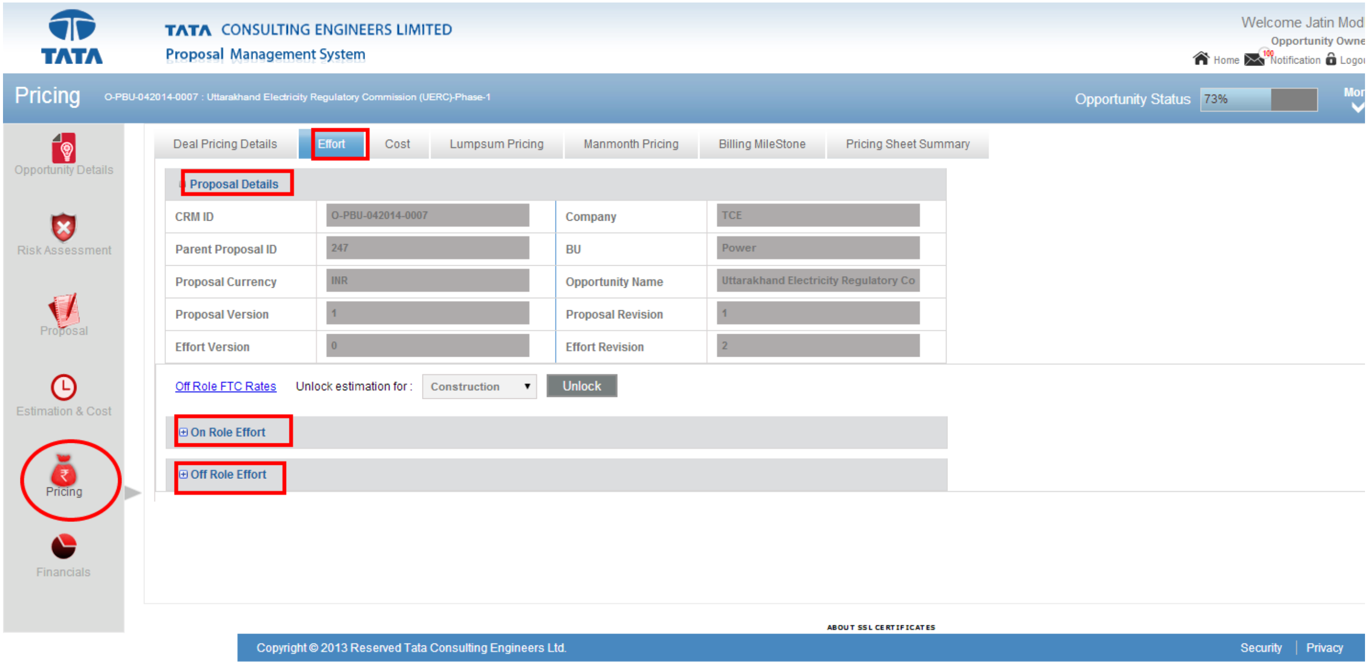
Onsite Construction Actuals Days per Month	26	OffShore Construction Actuals Days per Month	26
Onsite Construction Actuals Hours per Day	8.5	OffShore Construction Actuals Hours per Day	8.5

Other Pricing Parameters

Taxable	☐	Currency	INR
Discount On Onsite Rate		Discount On Offshore Rate	
Use Predefined Domestic Rate	☐	Use Predefined International Rate	☐

9.2 Effort

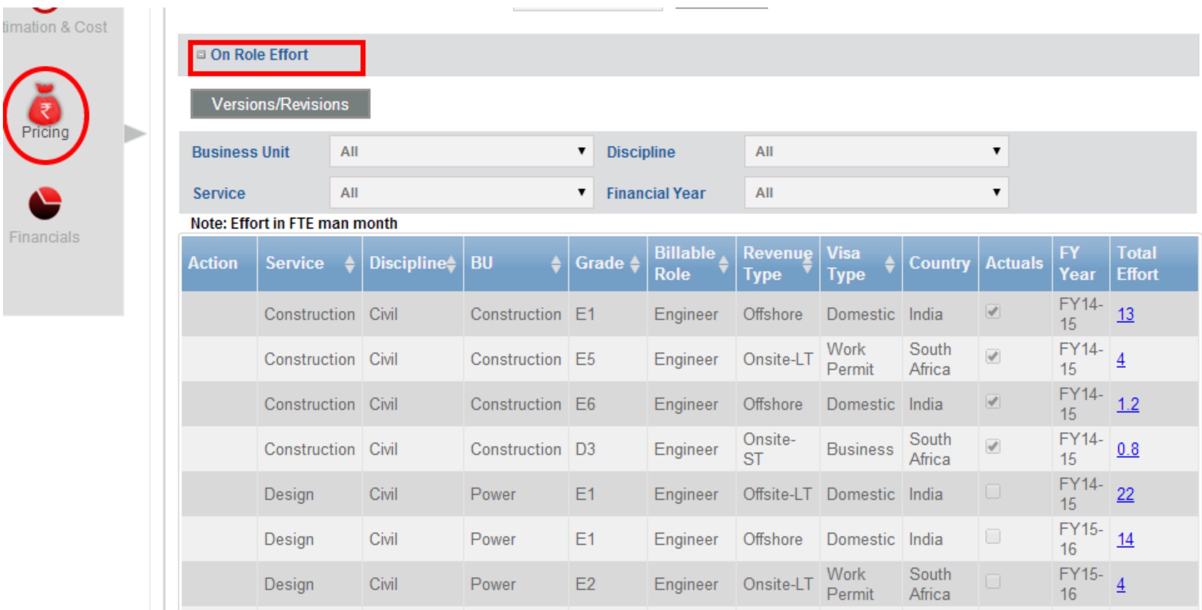
On clicking the "Effort" tab, Opportunity Owner comes to a screen where he can view the effort estimates uploaded by different Proposal Engineers at the time of Estimation upload. This screen is divided into the sections "Proposal Details", "On Role Effort" and "Off Role Effort".

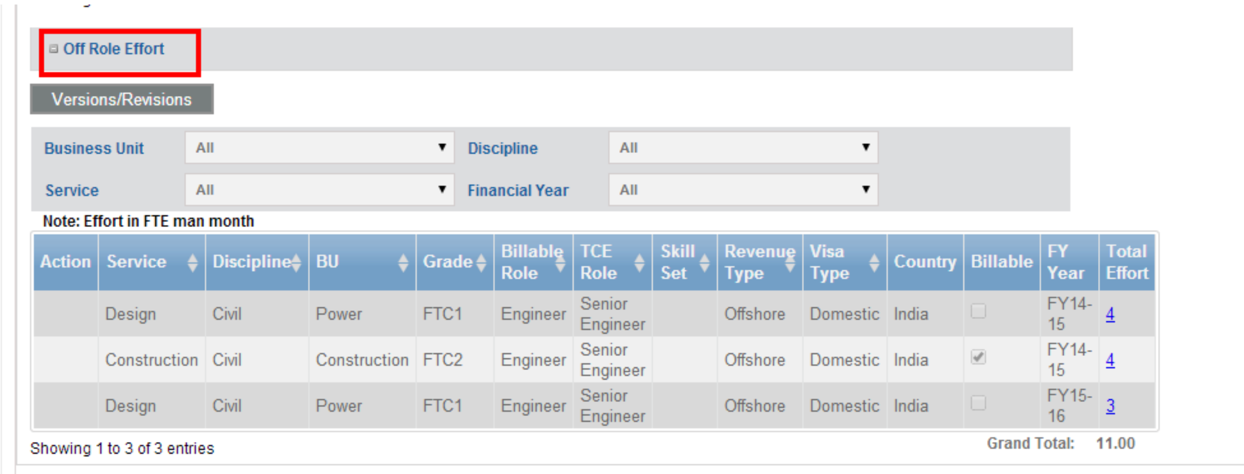


Under the section "On Role Effort", Opportunity Owner can view all On Role Effort uploaded by different Proposal Engineers at the time of Estimation upload and all efforts uploaded by him. Owner cannot delete efforts added by proposal engineer or proposal coordinator, he can edit only month-wise effort for such entries. For effort entry added by owner himself, there is full permission. Owner is allowed to delete and update any field of such entries.

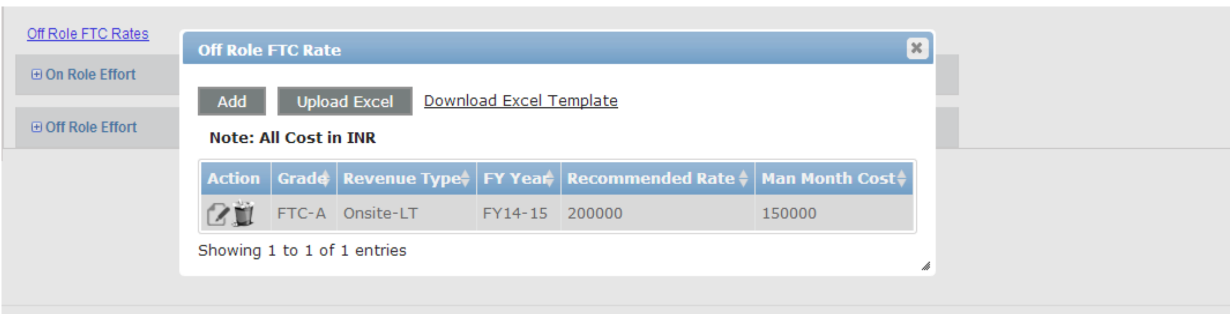
On clicking "Off Role Effort" owner can view all off role effort added by him. Opportunity Owner has full permission on Off Role effort entries to delete and update any field.

For making changes in On Role and Off Role effort, Owner need to unlock estimation for respective BU. After unlocking Add, Edit, Delete functionality become available.





There is a link Off Role FTC Rates above On Role Effort section. On clicking this, Owner can view Recommended Rate and Manmonth Cost for Off Role FTC employees. Here owner can define off role ftc grade (it should be different from On Role grades defined in admin) and its recommended rate and cost according to revenue type and FY year.

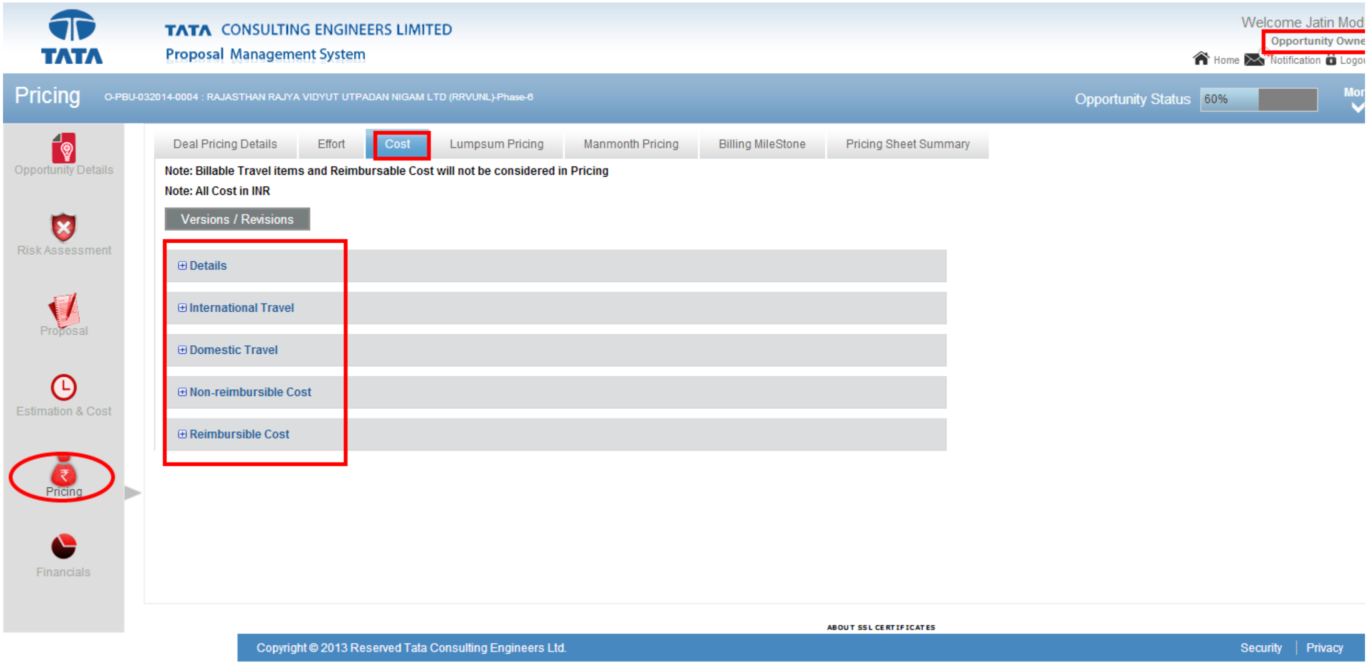


Owner can also download excel template, fill data and upload excel so as to add multiple FTC Rate entries. While adding Off Role Effort owner is allowed to enter effort for only those Off Role grades, Revenue type and FY year for which rate is defined.

After making changes in effort, owner can click on "Send For Review" button. Then Estimation approver of respective BU can approve or reject changes. If changes are approved then owner need to unlock estimation for respective BU to make any changes.

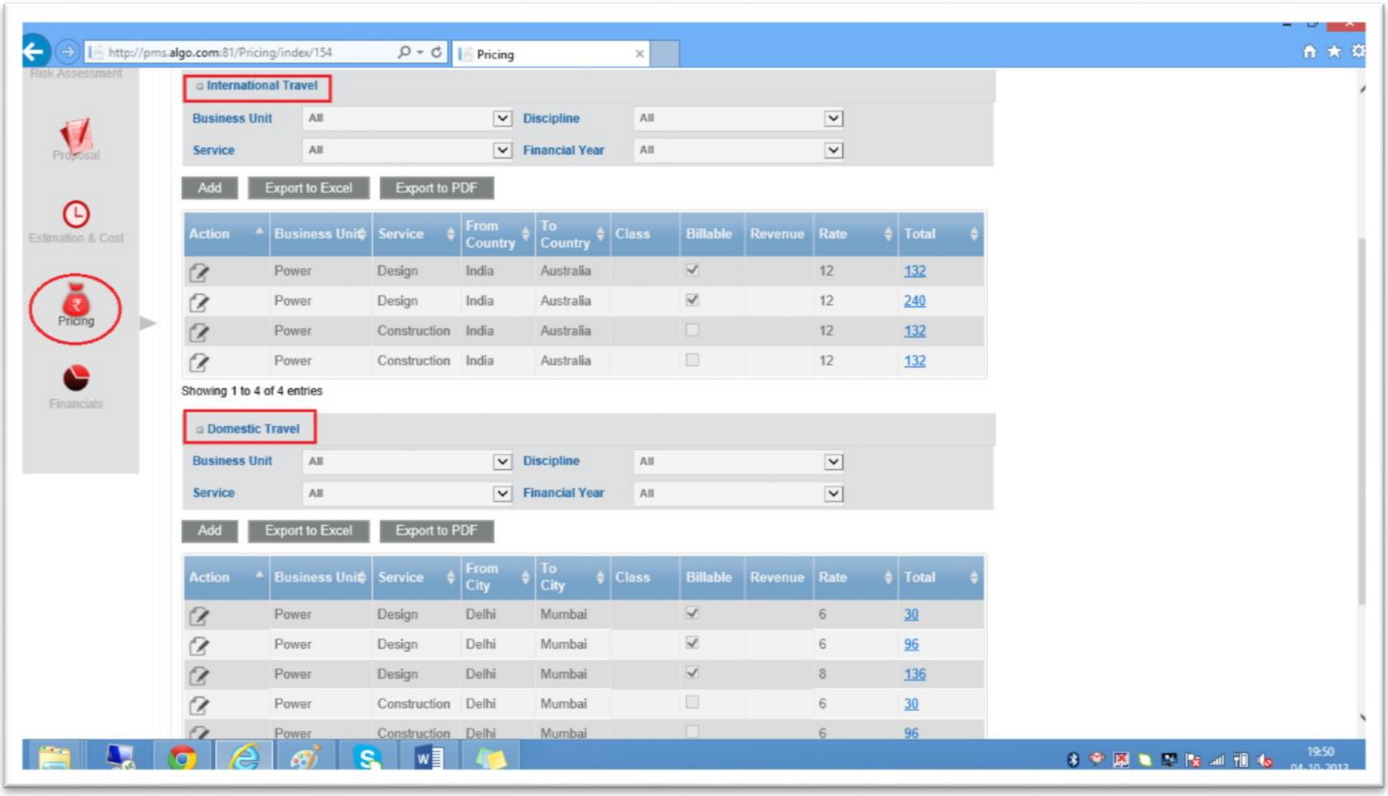
9.3 Cost

On clicking the "Cost" tab, Opportunity Owner comes to a screen where he can view the "other revenue and cost" uploaded by different Proposal Engineers at the time of Estimation upload. This screen also displays the sections "International Travel", "Domestic Travel", "Non-reimbursable Cost" and "Reimbursable Cost" uploaded by different Proposal Engineers.

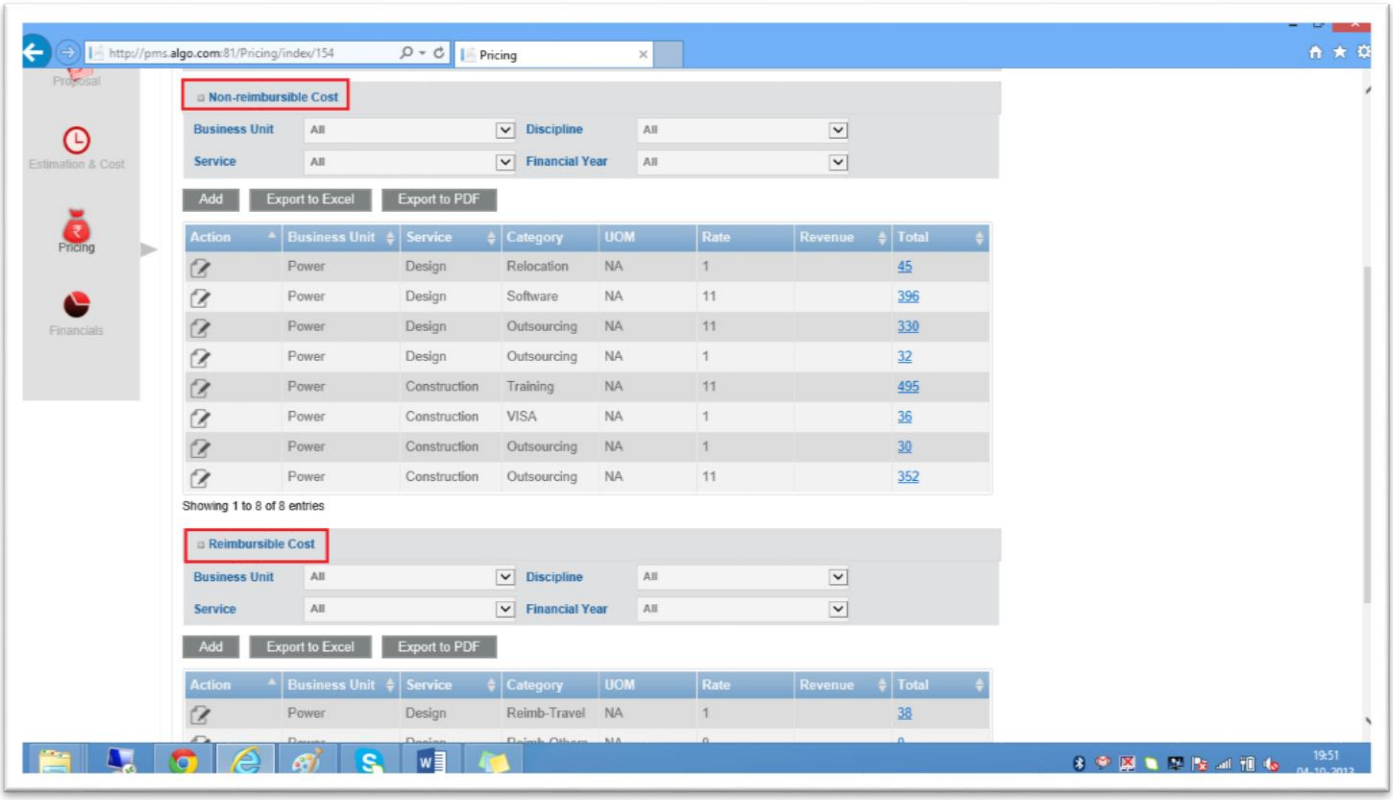


Clicking on these sections, Opportunity Owner can see the details of the data uploaded by "Proposal Engineers" for the same.

Clicking on International Travel and Domestic Travel sections, Opportunity Owner can see the details of the data uploaded by "Proposal Engineers" under these sections.

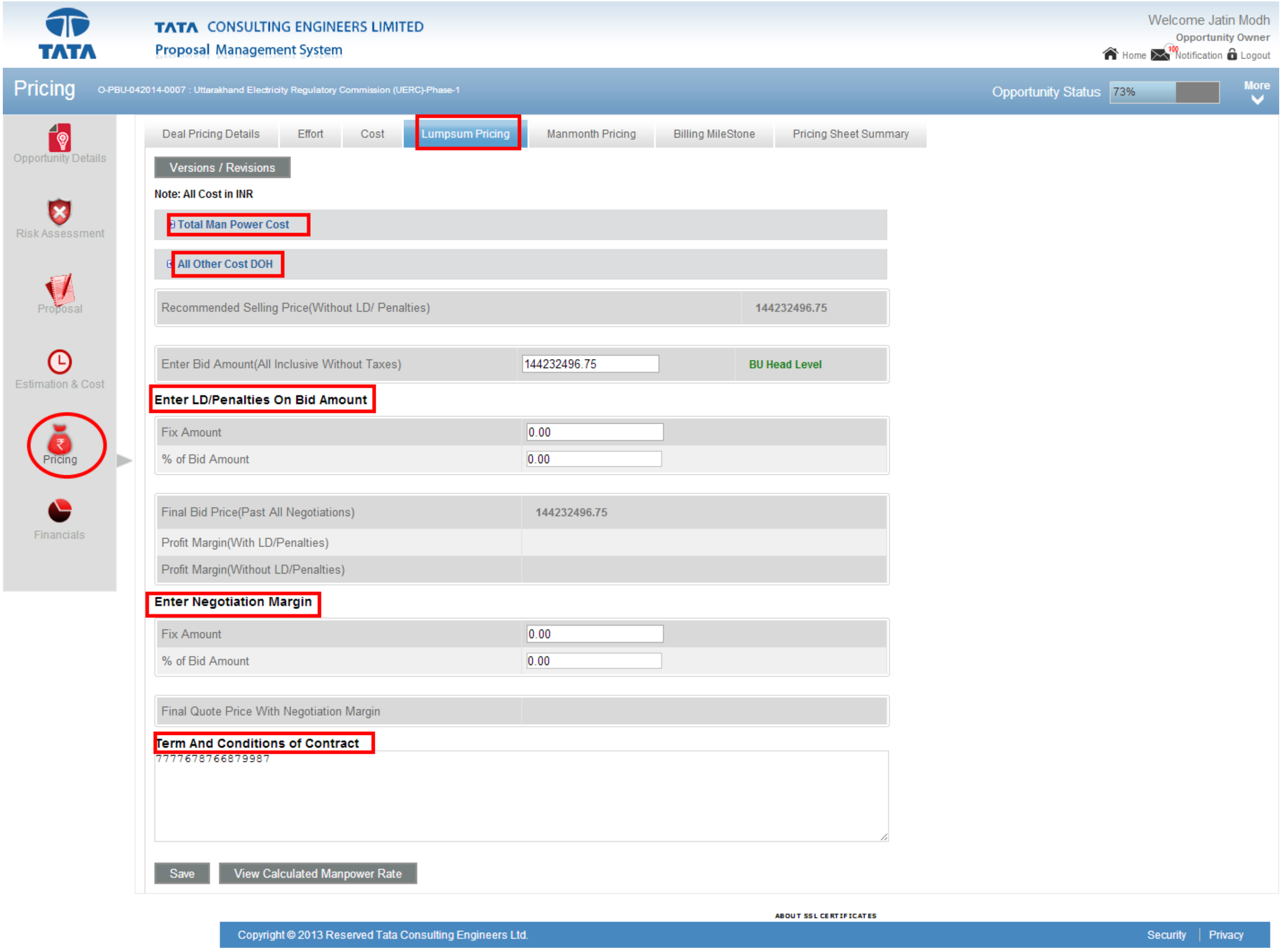


Clicking on Non-Reimbursable Cost and Reimbursable Cost sections, Opportunity Owner can see the details of the data uploaded by “Proposal Engineers” under these sections.

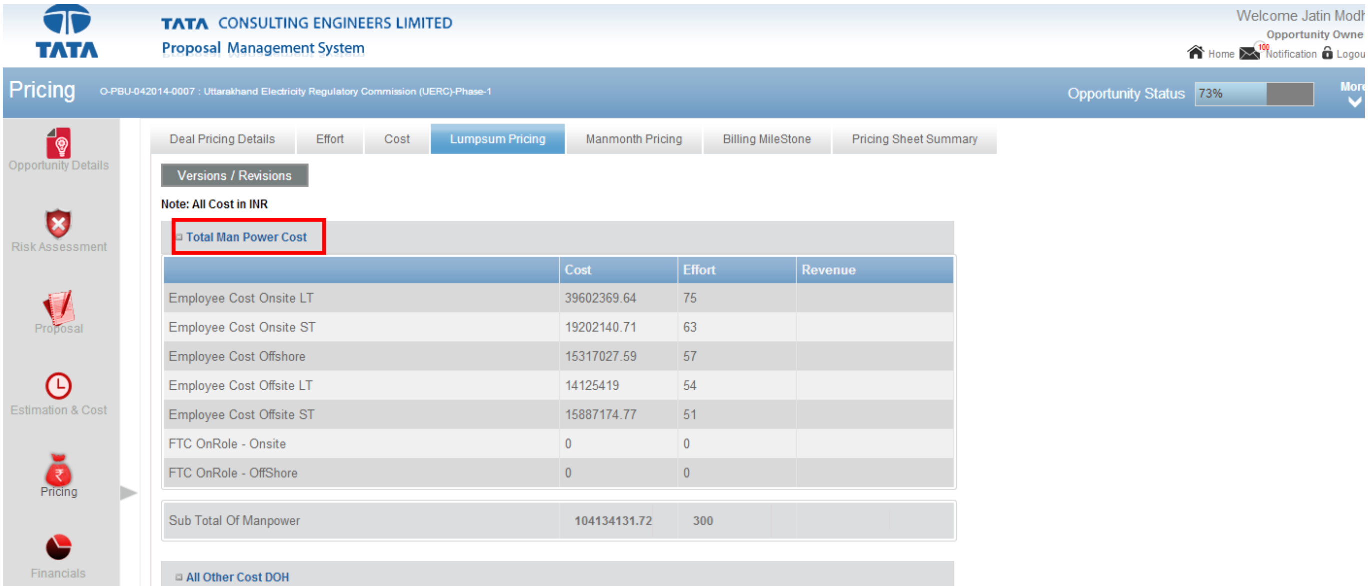


9.4 Lumpsum Pricing

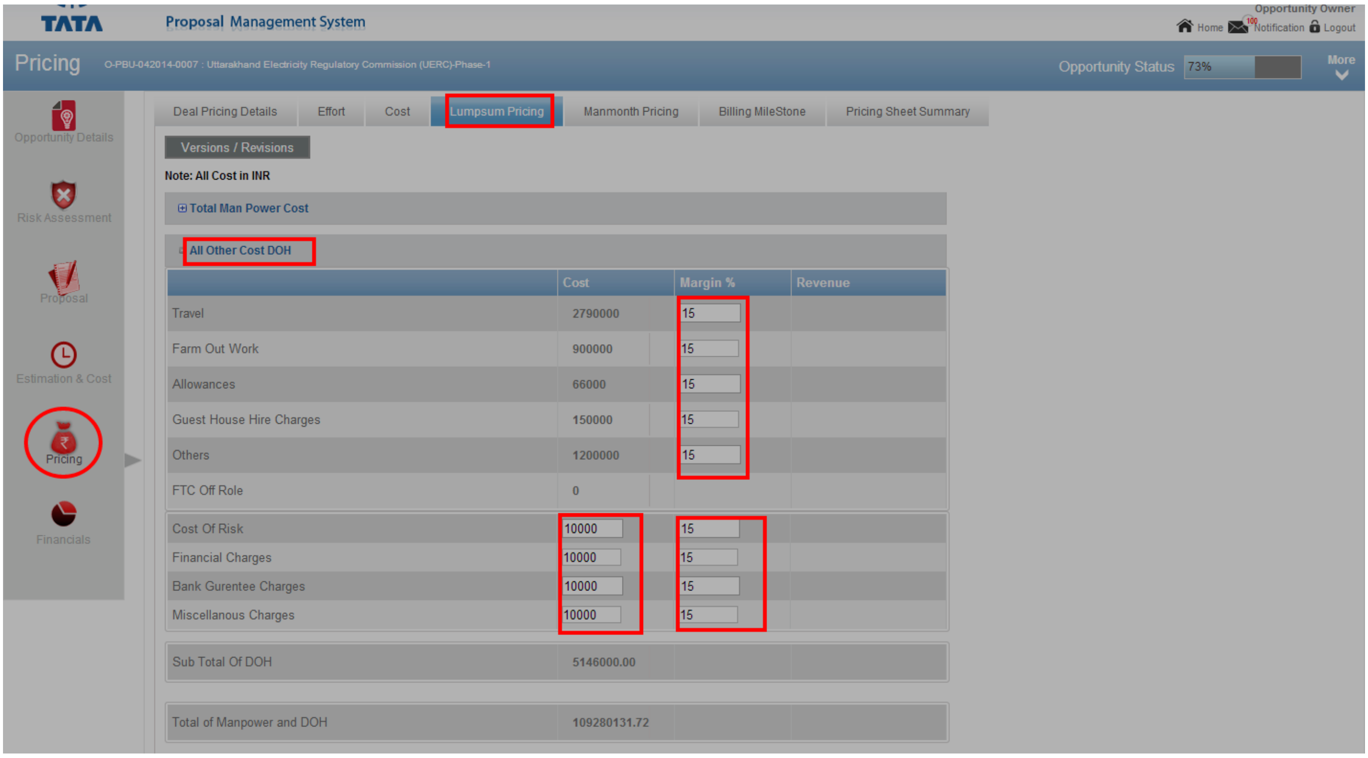
On clicking the "Lumpsum Pricing" tab, Opportunity Owner comes to this screen where he can view & edit the values for "Total man Power Cost ", "All Other Cost DOH", "LD/Penalties" and "Negotiation Margin" and he can also set up the "Term and Conditions of Contract" through this screen. Similarly Proposal Reviewer, Pricing Reviewer and Proposal Approver can view /edit these values during approval cycle.



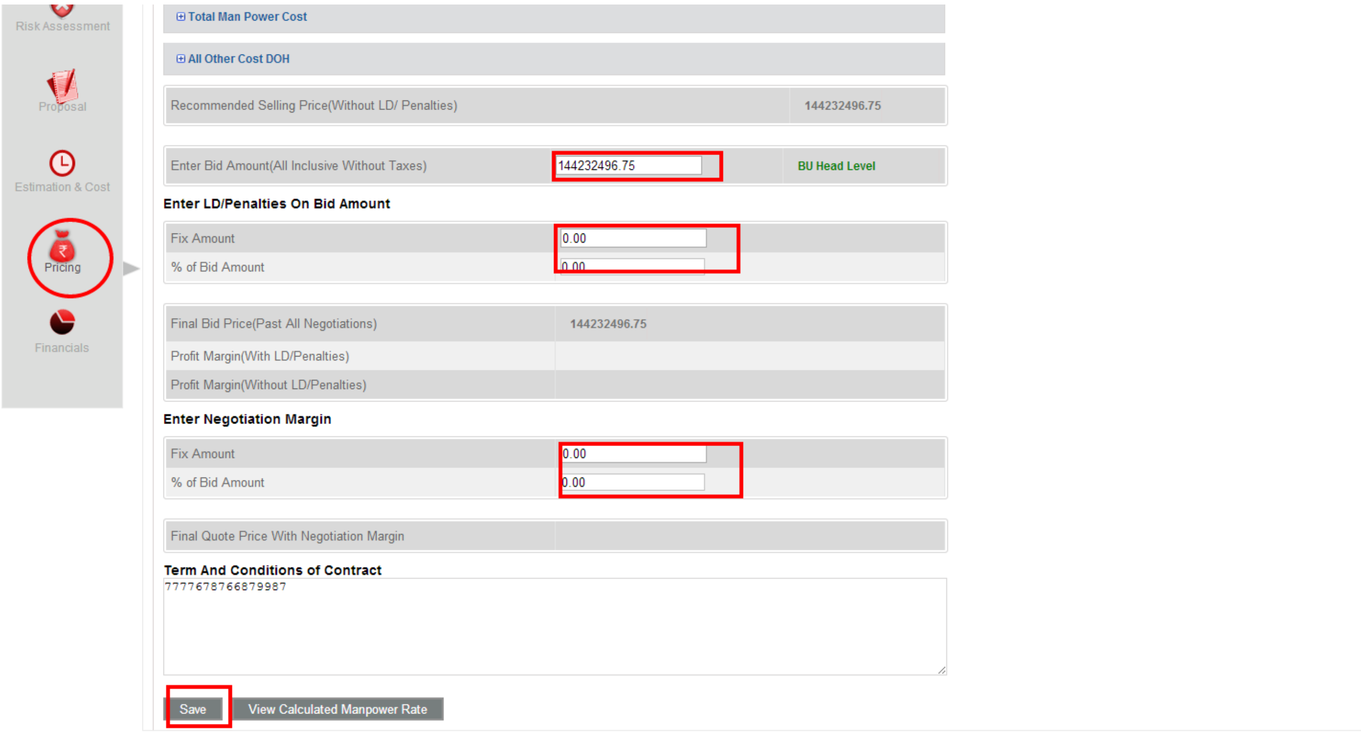
By clicking the "Total man Power Cost" section, user can see the Cost and effort details of Man Power for all revenue type.



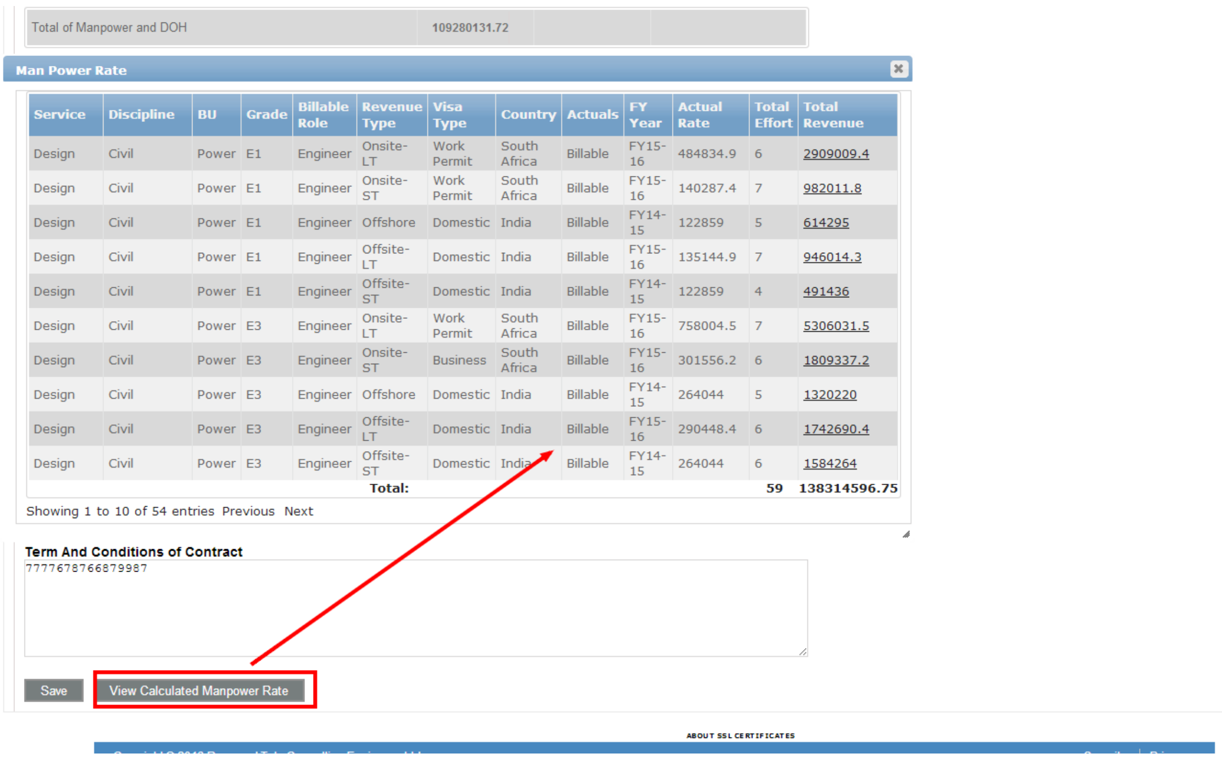
By clicking the “All Other Cost DOH”sections, user can update the Margin percentage and Cost for the other expenses.



User can also update all inclusive Bid Amount without taxes and LD/Penalties on Bid Amount and Negotiation margin.



By clicking on “View Calculated Manpower Rate” user can see Actual Rate and Total Revenue for each lumpsum effort entry for corresponding Financial Year and Revenue Type.



Total of Manpower and DOH 109280131.72

Man Power Rate

Service	Discipline	BU	Grade	Billable Role	Revenue Type	Visa Type	Country	Actuals	FY Year	Actual Rate	Total Effort	Total Revenue
Design	Civil	Power	E1	Engineer	Onsite-LT	Work Permit	South Africa	Billable	FY15-16	484834.9	6	2909009.4
Design	Civil	Power	E1	Engineer	Onsite-ST	Work Permit	South Africa	Billable	FY15-16	140287.4	7	982011.8
Design	Civil	Power	E1	Engineer	Offshore	Domestic	India	Billable	FY14-15	122859	5	614295
Design	Civil	Power	E1	Engineer	Offsite-LT	Domestic	India	Billable	FY15-16	135144.9	7	946014.3
Design	Civil	Power	E1	Engineer	Offsite-ST	Domestic	India	Billable	FY14-15	122859	4	491436
Design	Civil	Power	E3	Engineer	Onsite-LT	Work Permit	South Africa	Billable	FY15-16	758004.5	7	5306031.5
Design	Civil	Power	E3	Engineer	Onsite-ST	Business	South Africa	Billable	FY15-16	301556.2	6	1809337.2
Design	Civil	Power	E3	Engineer	Offshore	Domestic	India	Billable	FY14-15	264044	5	1320220
Design	Civil	Power	E3	Engineer	Offsite-LT	Domestic	India	Billable	FY15-16	290448.4	6	1742690.4
Design	Civil	Power	E3	Engineer	Offsite-ST	Domestic	India	Billable	FY14-15	264044	6	1584264
					Total:						59	138314596.75

Showing 1 to 10 of 54 entries Previous Next

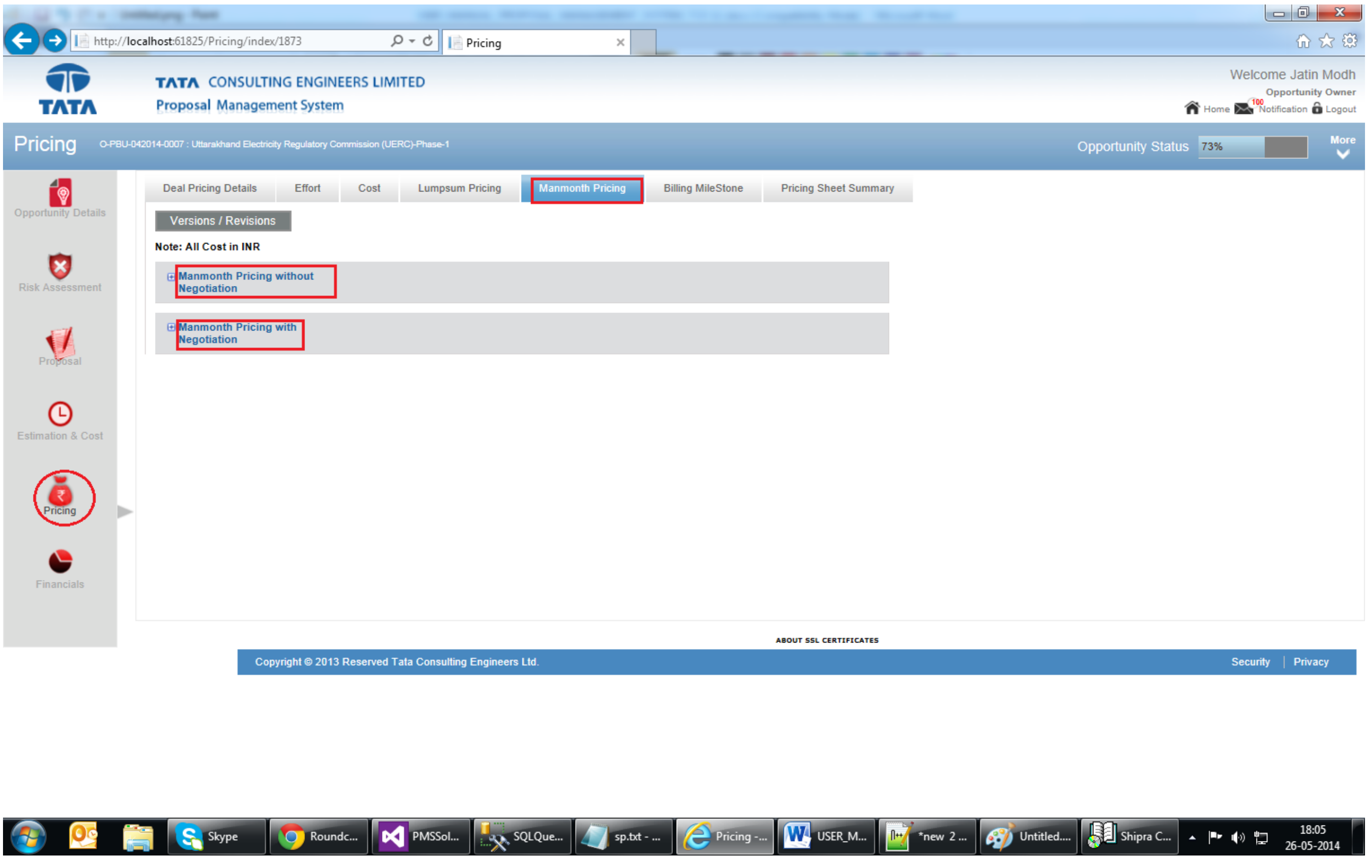
Term And Conditions of Contract
7777678766879987

Save
View Calculated Manpower Rate

Similarly Proposal Reviewer, Pricing Reviewer and Proposal approver can view and update data during proposal approval cycle when it’s their turn for approval.

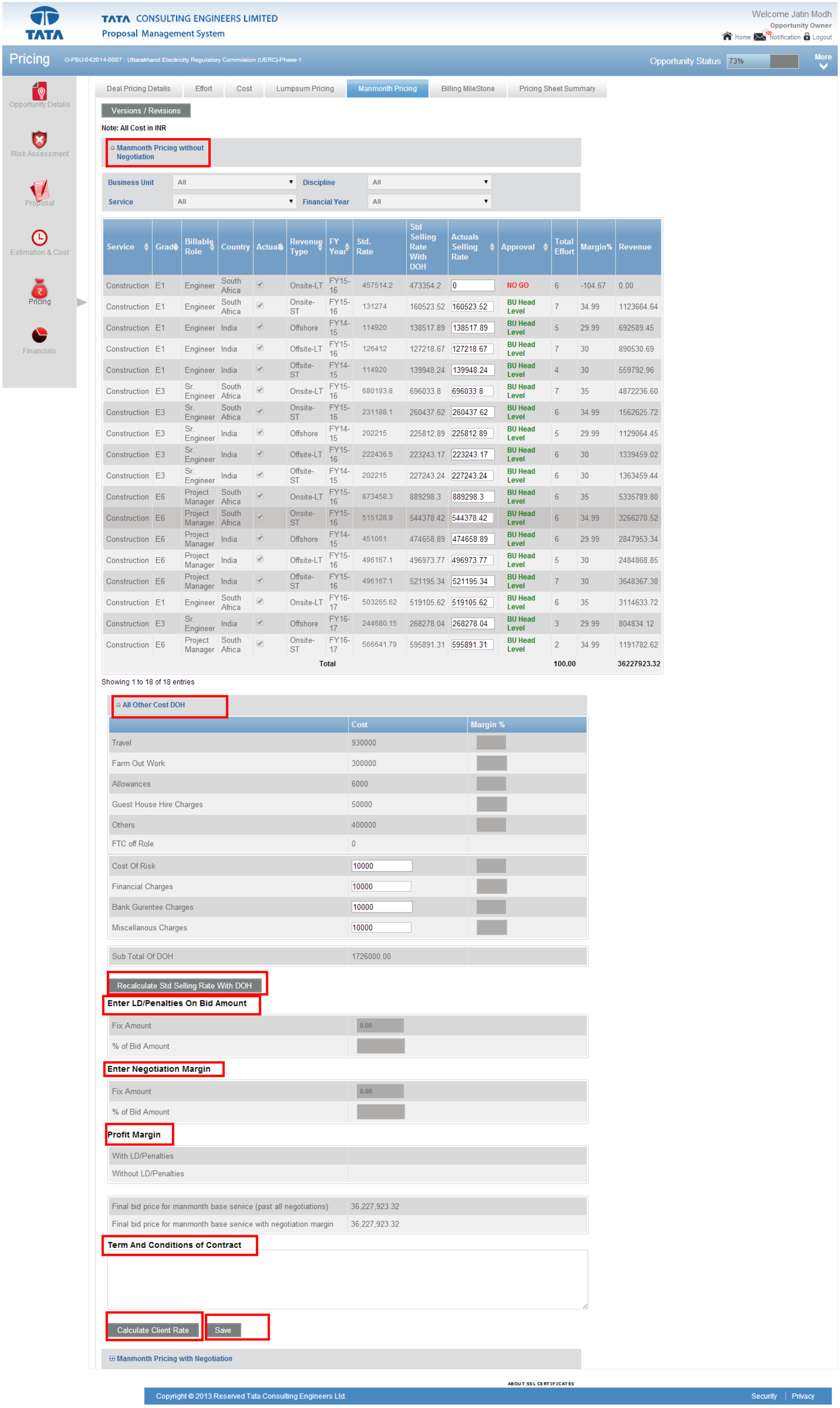
9.5 Manmonth Pricing

On clicking the "Manmonth Pricing" tab, there appear two tabs "Manmonth Pricing without Negotiation" and "Manmonth Pricing with Negotiation".



On clicking “Manmonth Pricing Without Negotiation” it display all Manmonth Pricing without negotiation summary .Owner can recalculated the selling rate with DOH by updating the “All Other Cost DOH ”and clicking on “Recalculated Std Selling Rate with DOH “.

Opportunity Owner can calculate Client Rate and update LD/Penalties on Bid Amount, Negotiation Margin and Profit Margin of Manmonth Pricing without negotiation.



TATA CONSULTING ENGINEERS LIMITED
Proposal Management System

Welcome Jatin Modh
Opportunity Owner
Home Notification Logout

Pricing O-PBU-042014-0007 : Uttarakhand Electricity Regulatory Commission (UERC)-Phase-1

Opportunity Status 73%

More

Opportunity Details
Risk Assessment
Proposal
Estimation & Cost
Pricing
Financials

Deal Pricing Details | Effort | Cost | Lumpsum Pricing | Manmonth Pricing | Billing MileStone | Pricing Sheet Summary

Versions / Revisions

Note: All Cost in INR

Manmonth Pricing without Negotiation

Business Unit: All
Discipline: All
Service: All
Financial Year: All

Service	Grade	Billable Role	Country	Actuals	Revenue Type	FY Year	Std. Rate	Std Selling Rate With DOH	Actuals Selling Rate	Approval	Total Effort	Margin%	Revenue
Construction	E1	Engineer	South Africa	✓	Onsite-LT	FY15-16	457514.2	473354.2	0	NO GO	6	-104.67	0.00
Construction	E1	Engineer	South Africa	✓	Onsite-ST	FY15-16	131274	160523.52	160523.52	BU Head Level	7	34.99	1123664.64
Construction	E1	Engineer	India	✓	Offshore	FY14-15	114920	138517.89	138517.89	BU Head Level	5	29.99	692589.45
Construction	E1	Engineer	India	✓	Offsite-LT	FY15-16	126412	127218.67	127218.67	BU Head Level	7	30	890530.69
Construction	E1	Engineer	India	✓	Offsite-ST	FY14-15	114920	139948.24	139948.24	BU Head Level	4	30	559792.96
Construction	E3	Sr. Engineer	South Africa	✓	Onsite-LT	FY15-16	680193.8	696033.8	696033.8	BU Head Level	7	35	4872236.60
Construction	E3	Sr. Engineer	South Africa	✓	Onsite-ST	FY15-16	231188.1	260437.62	260437.62	BU Head Level	6	34.99	1562625.72
Construction	E3	Sr. Engineer	India	✓	Offshore	FY14-15	202215	225812.89	225812.89	BU Head Level	5	29.99	1129064.45
Construction	E3	Sr. Engineer	India	✓	Offsite-LT	FY15-16	222436.5	223243.17	223243.17	BU Head Level	6	30	1339459.02
Construction	E3	Sr. Engineer	India	✓	Offsite-ST	FY14-15	202215	227243.24	227243.24	BU Head Level	6	30	1363459.44
Construction	E6	Project Manager	South Africa	✓	Onsite-LT	FY15-16	873458.3	889298.3	889298.3	BU Head Level	6	35	5335789.80
Construction	E6	Project Manager	South Africa	✓	Onsite-ST	FY15-16	515128.9	544378.42	544378.42	BU Head Level	6	34.99	3266270.52
Construction	E6	Project Manager	India	✓	Offshore	FY14-15	451061	474658.89	474658.89	BU Head Level	6	29.99	2847953.34
Construction	E6	Project Manager	India	✓	Offsite-LT	FY15-16	496167.1	496973.77	496973.77	BU Head Level	5	30	2484868.85
Construction	E6	Project Manager	India	✓	Offsite-ST	FY15-16	496167.1	521195.34	521195.34	BU Head Level	7	30	3648367.38
Construction	E1	Engineer	South Africa	✓	Onsite-LT	FY16-17	503265.62	519105.62	519105.62	BU Head Level	6	35	3114633.72
Construction	E3	Sr. Engineer	India	✓	Offshore	FY16-17	244680.15	268278.04	268278.04	BU Head Level	3	29.99	804834.12
Construction	E6	Project Manager	South Africa	✓	Onsite-ST	FY16-17	566641.79	595891.31	595891.31	BU Head Level	2	34.99	1191782.62
						Total					100.00		36227923.32

Showing 1 to 18 of 18 entries

All Other Cost DOH

	Cost	Margin %
Travel	930000	
Farm Out Work	300000	
Allowances	6000	
Guest House Hire Charges	50000	
Others	400000	
FTC off Role	0	
Cost Of Risk	10000	
Financial Charges	10000	
Bank Gurentee Charges	10000	
Miscellanous Charges	10000	
Sub Total Of DOH	1726000.00	

Recalculate Std Selling Rate With DOH

Enter LD/Penalties On Bid Amount

Fix Amount	0.00
% of Bid Amount	

Enter Negotiation Margin

Fix Amount	0.00
% of Bid Amount	

Profit Margin

With LD/Penalties	
Without LD/Penalties	

Final bid price for manmonth base service (past all negotiations)	36,227,923.32
Final bid price for manmonth base service with negotiation margin	36,227,923.32

Term And Conditions of Contract

Calculate Client Rate | Save

Manmonth Pricing with Negotiation

ABOUT SSL CERTIFICATES

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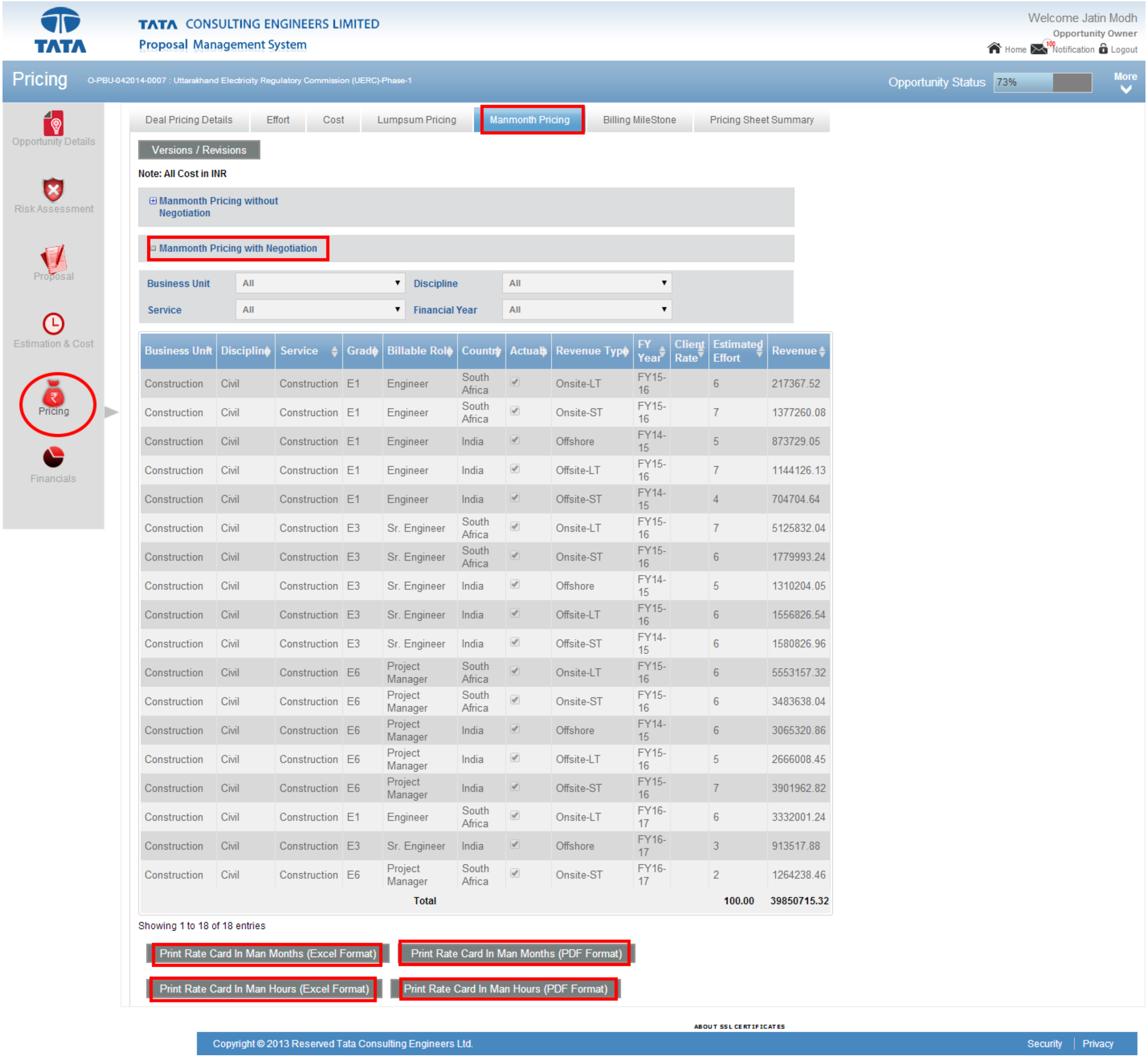
On clicking "Manmonth Pricing With Negotiation", this section display all manmonth pricing summary with negotiation and opportunity owner can print the Rate Card in "Man Months " and "Man Hours" in excel and pdf format.



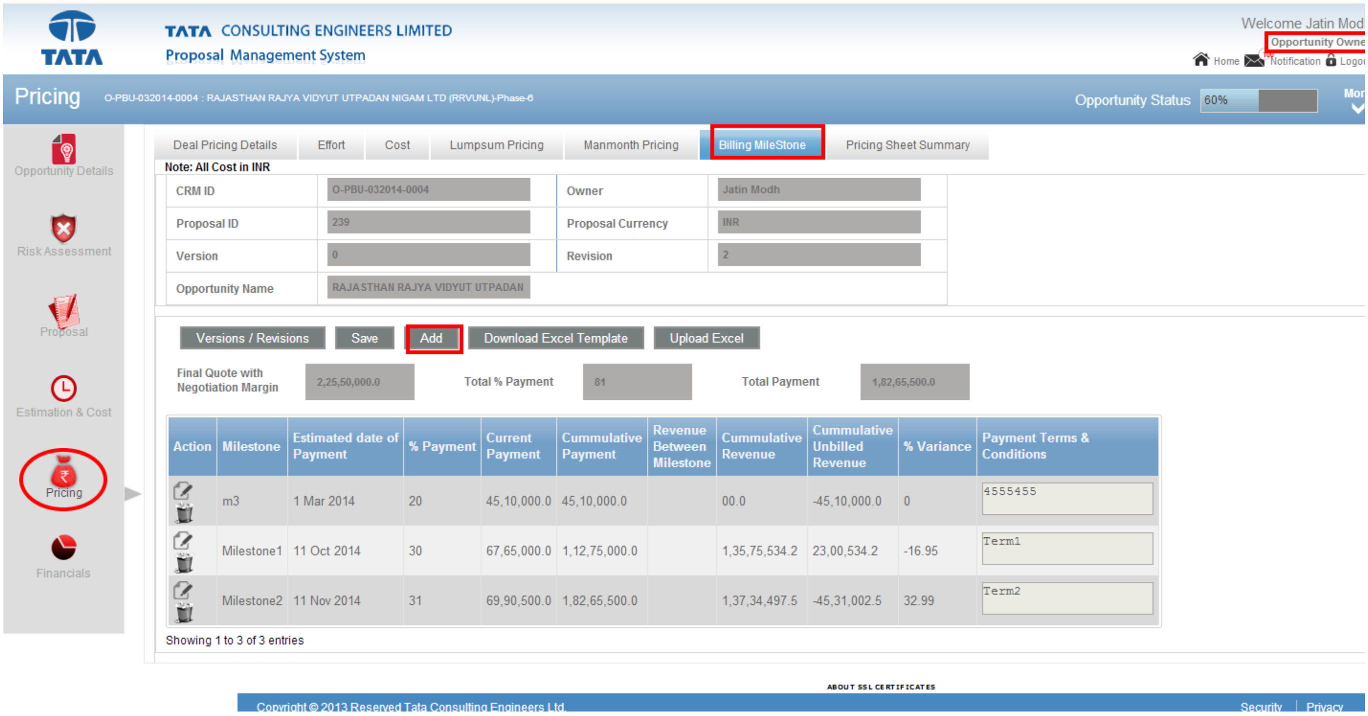
Similarly Proposal Reviewer, Pricing Reviewer and Proposal approver can view and update data during proposal approval cycle when it's their turn for approval.

9.6 Billing Milestone

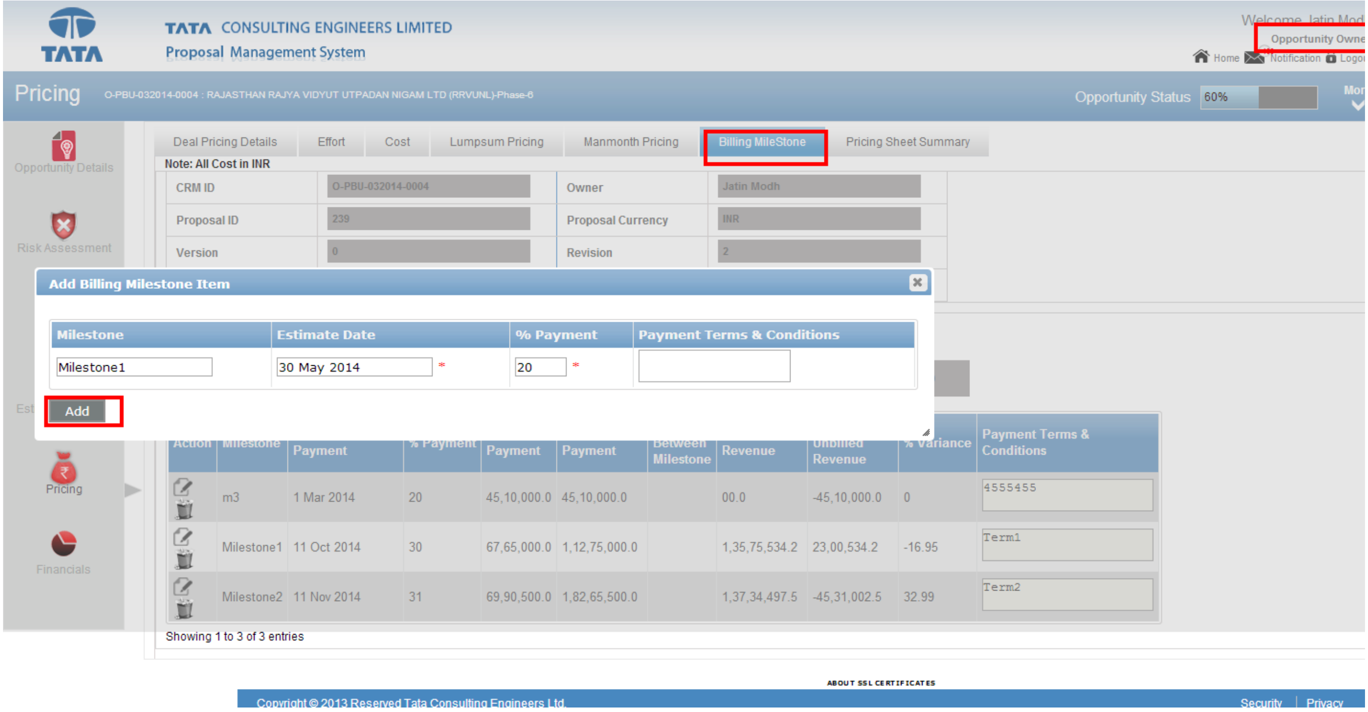
On clicking the "Billing Milestone" tab, Opportunity Owner comes to a screen where he can view Opportunity details and Milestone, Estimated date of payment, % payment, Cumulative Payment, Cumulative Revenue etc. in the Billing Milestone. Above table containing all milestone items, user can view final quote price, total payment % and total amount. Owner can add Milestone, Estimated date of payment, % payment and Terms Conditions. Similarly Proposal Reviewer, Pricing Reviewer and Proposal approver can add/upload milestone items during proposal approval cycle when it's their turn for approval.

To add the billing milestones, follow these steps:

Step 1: Click on the "Add" button from the Billing Milestone screen.



Step 2: Fill in the appropriate details and click the "Add" button from the "Add Billing Milestone Item" popup screen.



Alternatively Opportunity owner/Reviewer/Approver can choose to upload excel to add multiple milestone items at a time. User first need to download excel template and then fill milestone details like Milestone, Estimated date of payment, % payment and Terms Conditions. User then uploads excel file to add all milestone items.

9.7 Pricing Sheet Summary

On clicking the “Pricing Sheet Summary” tab, Opportunity Owner comes to a screen where he can view details like Lumpsum Pricing, Manmonth Pricing and Manmonth Pricing with Negotiation.

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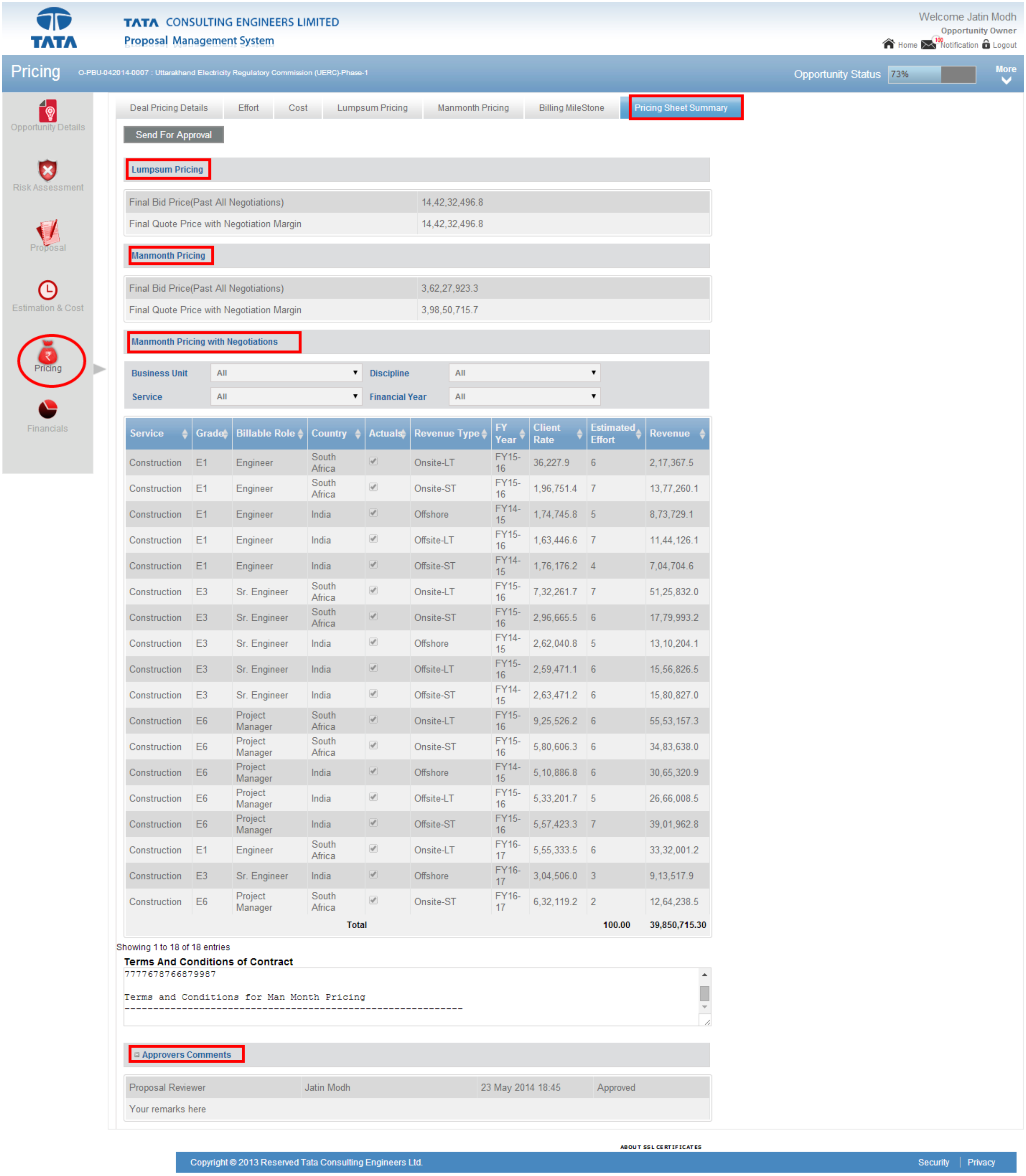
TATA CONSULTING ENGINEERS LIMITED
Proposal Management System

Welcome Jatin Modh
Opportunity Owner
Home Notification Logout

Pricing O-PBU-042014-0007 : Uttarakhand Electricity Regulatory Commission (UERC)-Phase-1

Opportunity Status 73%

More

Opportunity Details
Risk Assessment
Proposal
Estimation & Cost
Pricing
Financials

Deal Pricing Details | Effort | Cost | Lumpsum Pricing | Manmonth Pricing | Billing MileStone | Pricing Sheet Summary

Send For Approval

Lumpsum Pricing

Final Bid Price(Past All Negotiations)	14,42,32,496.8
Final Quote Price with Negotiation Margin	14,42,32,496.8

Manmonth Pricing

Final Bid Price(Past All Negotiations)	3,62,27,923.3
Final Quote Price with Negotiation Margin	3,98,50,715.7

Manmonth Pricing with Negotiations

Business Unit: All
Discipline: All
Service: All
Financial Year: All

Service	Grade	Billable Role	Country	Actuals	Revenue Type	FY Year	Client Rate	Estimated Effort	Revenue
Construction	E1	Engineer	South Africa	✓	Onsite-LT	FY15-16	36,227.9	6	2,17,367.5
Construction	E1	Engineer	South Africa	✓	Onsite-ST	FY15-16	1,96,751.4	7	13,77,260.1
Construction	E1	Engineer	India	✓	Offshore	FY14-15	1,74,745.8	5	8,73,729.1
Construction	E1	Engineer	India	✓	Offsite-LT	FY15-16	1,63,446.6	7	11,44,126.1
Construction	E1	Engineer	India	✓	Offsite-ST	FY14-15	1,76,176.2	4	7,04,704.6
Construction	E3	Sr. Engineer	South Africa	✓	Onsite-LT	FY15-16	7,32,261.7	7	51,25,832.0
Construction	E3	Sr. Engineer	South Africa	✓	Onsite-ST	FY15-16	2,96,665.5	6	17,79,993.2
Construction	E3	Sr. Engineer	India	✓	Offshore	FY14-15	2,62,040.8	5	13,10,204.1
Construction	E3	Sr. Engineer	India	✓	Offsite-LT	FY15-16	2,59,471.1	6	15,56,826.5
Construction	E3	Sr. Engineer	India	✓	Offsite-ST	FY14-15	2,63,471.2	6	15,80,827.0
Construction	E6	Project Manager	South Africa	✓	Onsite-LT	FY15-16	9,25,526.2	6	55,53,157.3
Construction	E6	Project Manager	South Africa	✓	Onsite-ST	FY15-16	5,80,606.3	6	34,83,638.0
Construction	E6	Project Manager	India	✓	Offshore	FY14-15	5,10,886.8	6	30,65,320.9
Construction	E6	Project Manager	India	✓	Offsite-LT	FY15-16	5,33,201.7	5	26,66,008.5
Construction	E6	Project Manager	India	✓	Offsite-ST	FY15-16	5,57,423.3	7	39,01,962.8
Construction	E1	Engineer	South Africa	✓	Onsite-LT	FY16-17	5,55,333.5	6	33,32,001.2
Construction	E3	Sr. Engineer	India	✓	Offshore	FY16-17	3,04,506.0	3	9,13,517.9
Construction	E6	Project Manager	South Africa	✓	Onsite-ST	FY16-17	6,32,119.2	2	12,64,238.5
			Total					**100.00**	**39,850,715.30**

Showing 1 to 18 of 18 entries

Terms And Conditions of Contract

7777678766879987

Terms and Conditions for Man Month Pricing

Approvers Comments

Proposal Reviewer	Jatin Modh	23 May 2014 18:45	Approved
Your remarks here			

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Starting Approval Cycle

Opportunity owner can click on "Send For Approval" button to send proposal for approval cycle. If all tasks of pricing stage are completed then proposal approvers are decided according to following parameters

- Profit Margin with LD Penalty in Lumpsum Pricing sheet
- Profit Margin with LD Penalty in Manmonth Pricing sheet
- Margin on Actual selling rate for all manmonth effort items
- Total Bid Amount of both Lumpsum and Manmonth including Negotiation margin.

Choosing Approval Cycle

According to these parameters, matching slab is picked from configured approval matrix in Admin for both Lumpsum and Manmonth. Out of these 2 cycles, longest cycle is selected. Longest cycle is one where there are more numbers of Proposal Approvers or level of approver is higher in case cycle length is same.

Approval Cycle Change

Once approval cycle get decided, entries of users corresponding to configured roles in that cycle is made into Proposal Team. As cycle deciding parameters can change during approval cycle, Cycle can change during approval cycle too. Approval cycle can get extended till Proposal approver turn but cycle can get shorten only till Proposal Reviewer turn. Also For roles whose approval is pending, user can change during approval cycle. If User for current role get changed then user is shown relevant alert.

No-Go Case

If Profit Margin with LD Penalty is less than 10% in Lumpsusm and Manmonth or Margin on Actual selling rate for any manmonth effort item is less than 10% then it is considered No-Go case. In such case it is mandatory for proposal approvers to mark this opportunity as Strategic and provide comments for it, before approving it.

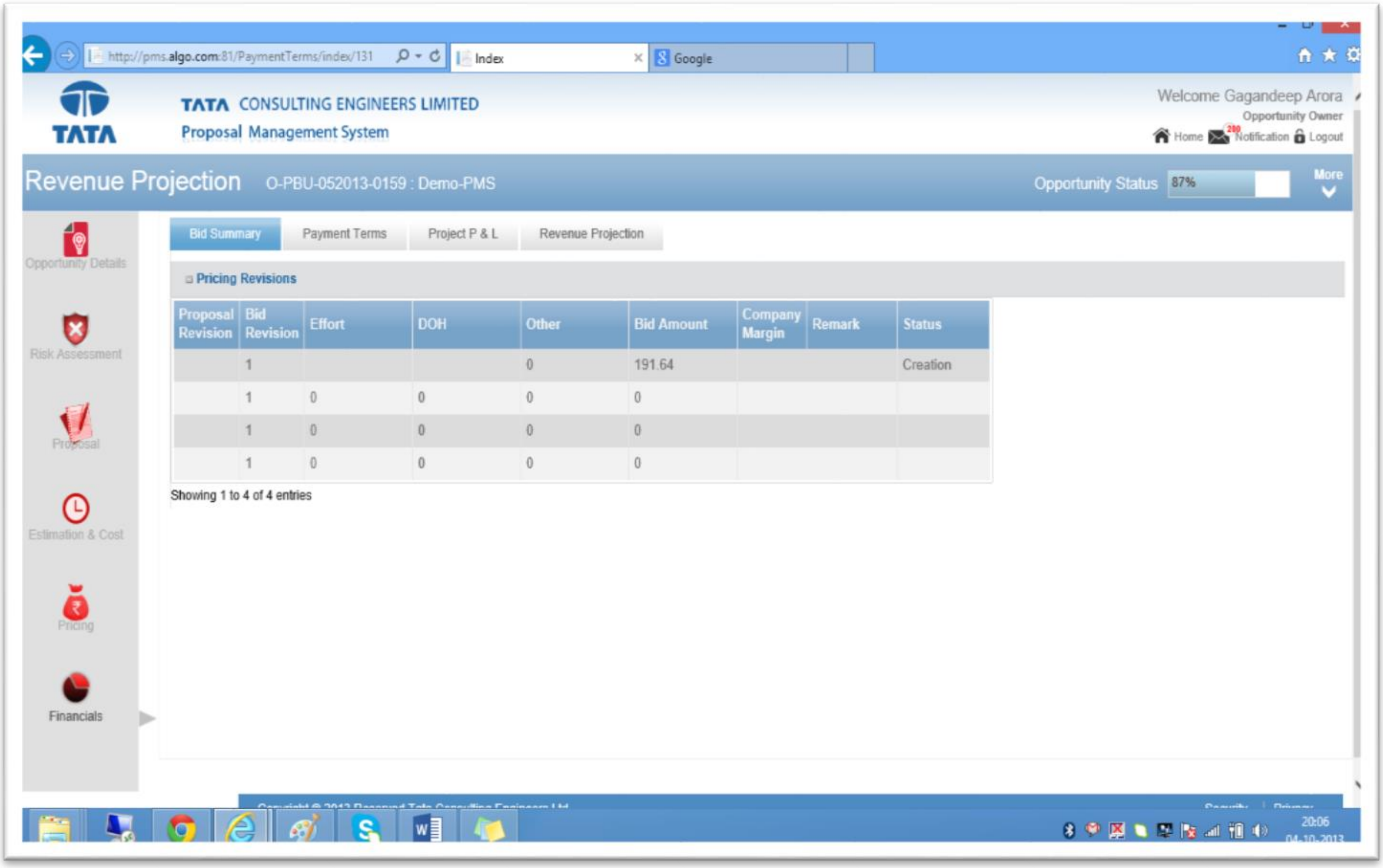
Stopping Approval Cycle

If approval cycle is in progress then opportunity owner can stop approval cycle. On clicking "Stop approval Cycle" button, corresponding reviewer/approver (with whom approval is pending) will be intimated. Pricing stage will get unlocked and owner need to save pricing sheet and billing milestone again.

10 STAGE 6: FINANCIALS

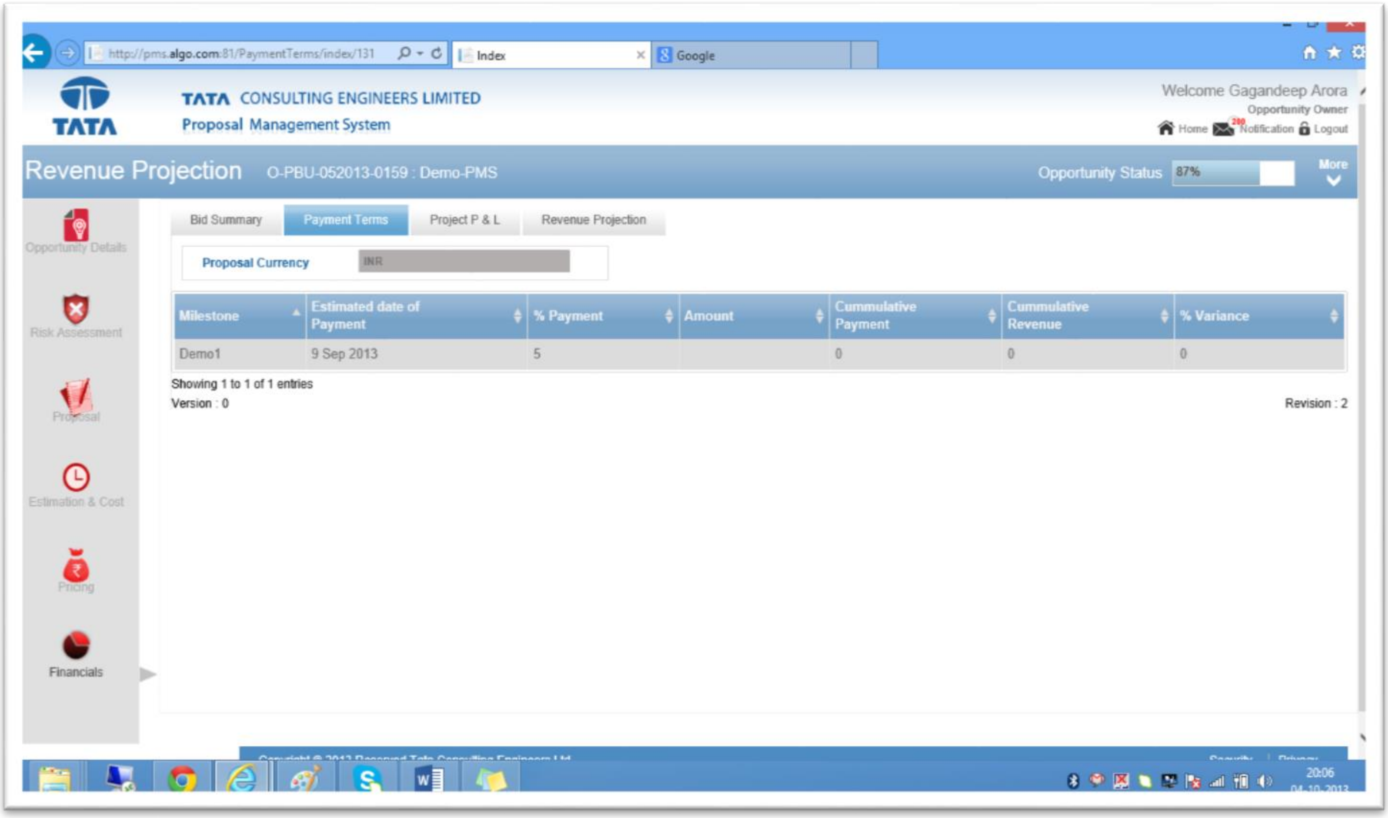
10.1 Bid Summary

On clicking the "Bid Summary" tab, Opportunity Owner comes to a screen where he can view the Pricing Revisions which comprises of Bid Revision, Effort, DOH, Bid Amount, Company Margin etc.



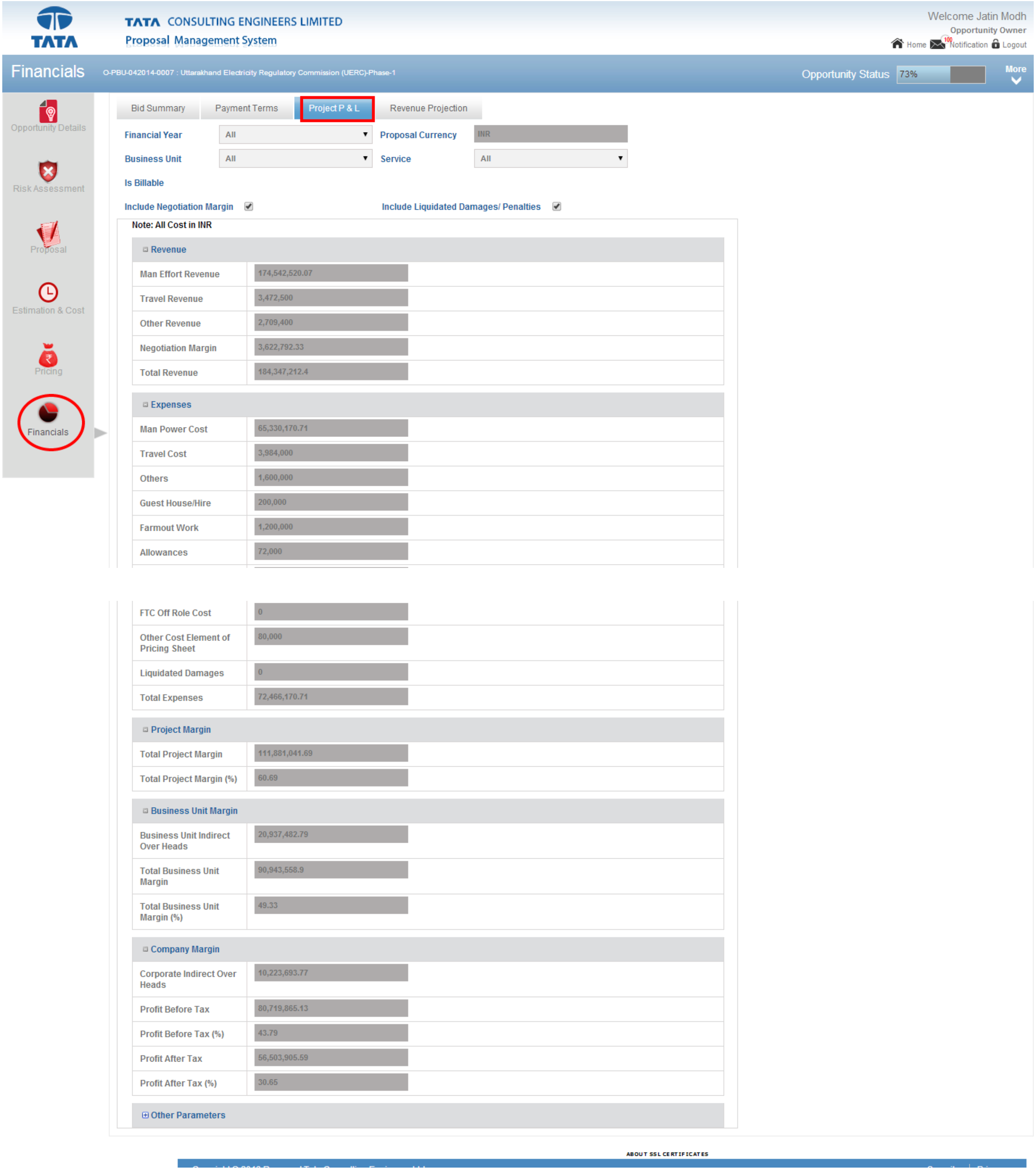
10.2 Payment Terms

On clicking the "Payment Terms" tab, Opportunity Owner comes to a screen where he can view Milestone details like Milestone, Estimated date of payment, % payment, Amount, Cumulative Payment, Cumulative Revenue and % Variance etc.



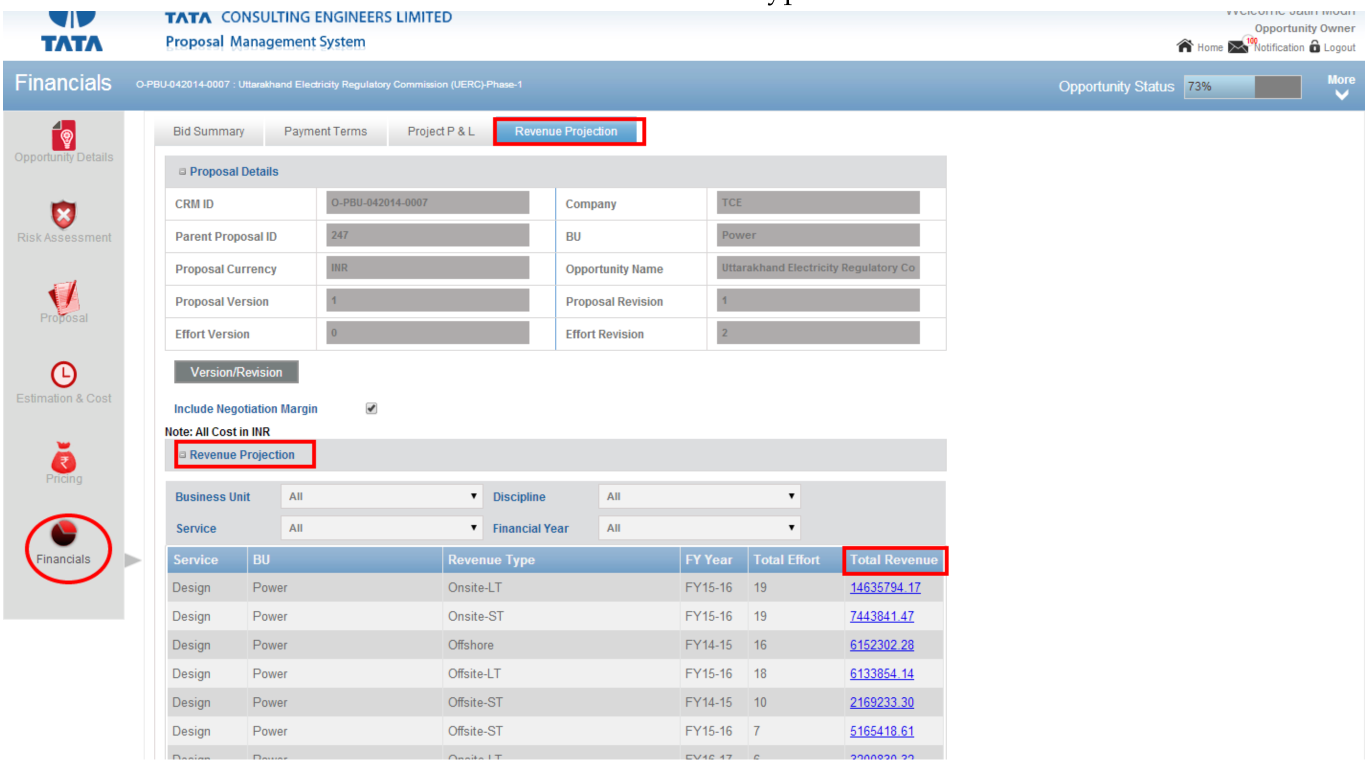
10.3 Project P&L

On clicking the "Project P&L" tab, Opportunity Owner comes to a screen where he can select financial year and view details in different sections "Revenue", "Expenses", "Project Margin", "Business Unit Margin", "Company Margin", and "Other Parameters" with respect to the selected Financial Year.



10.4 Revenue Projection

On clicking the "Revenue Projection" tab, Opportunity Owner comes to a screen where he can view the total effort and total revenue details in different Revenue Type and Financial Year .



Construction	Construction	Onsite-ST	FY15-16	19	6712891.36
Construction	Construction	Offshore	FY14-15	16	5249253.96
Construction	Construction	Offsite-LT	FY15-16	18	5366961.12
Construction	Construction	Offsite-ST	FY14-15	10	2285531.60
Construction	Construction	Offsite-ST	FY15-16	7	3901962.82
Construction	Construction	Onsite-LT	FY16-17	6	3332001.24
Construction	Construction	Offshore	FY16-17	3	913517.88
Construction	Construction	Onsite-ST	FY16-17	2	1264238.48
Design	Infra	Onsite-LT	FY15-16	19	14600619.47
Design	Infra	Onsite-ST	FY15-16	19	7397695.27
Design	Infra	Offshore	FY14-15	16	6125561.28
Design	Infra	Offsite-LT	FY15-16	18	6103616.24
Design	Infra	Offsite-ST	FY14-15	10	2156143.30
Design	Infra	Offsite-ST	FY15-16	7	5146699.91
Design	Infra	Onsite-LT	FY16-17	6	3200830.32
Design	Infra	Offshore	FY16-17	3	952830.42
Design	Infra	Onsite-ST	FY16-17	2	1854500.16
Inspection Expediting	Power	Onsite-LT	FY15-16	19	14635794.17
Inspection Expediting	Power	Onsite-ST	FY15-16	19	7431841.47
Inspection Expediting	Power	Offshore	FY14-15	16	6152302.28
Inspection Expediting	Power	Offsite-LT	FY15-16	18	6133854.14
Inspection Expediting	Power	Offsite-ST	FY14-15	10	2169233.30
Inspection Expediting	Power	Offsite-ST	FY15-16	7	5165418.61
Inspection Expediting	Power	Onsite-LT	FY16-17	6	3200830.32
Inspection Expediting	Power	Offshore	FY16-17	3	958939.74
Design	Infra	Offshore	FY16-17	3	952830.42
Design	Infra	Onsite-ST	FY16-17	2	1854500.16
Inspection Expediting	Power	Onsite-LT	FY15-16	19	14635794.17
Inspection Expediting	Power	Onsite-ST	FY15-16	19	7431841.47
Inspection Expediting	Power	Offshore	FY14-15	16	6152302.28
Inspection Expediting	Power	Offsite-LT	FY15-16	18	6133854.14
Inspection Expediting	Power	Offsite-ST	FY14-15	10	2169233.30
Inspection Expediting	Power	Offsite-ST	FY15-16	7	5165418.61
Inspection Expediting	Power	Onsite-LT	FY16-17	6	3200830.32
Inspection Expediting	Power	Offshore	FY16-17	3	958939.74
Inspection Expediting	Power	Onsite-ST	FY16-17	2	1860835.72
Design	Power	Onsite-ST	FY14-15		57500.00
Design	Power	Offsite-LT	FY14-15		6900.00
Design	Infra	Onsite-ST	FY14-15		57500.00
Design	Infra	Offsite-LT	FY14-15		34500.00
Inspection Expediting	Power	Onsite-ST	FY14-15		57500.00
Inspection Expediting	Power	Offsite-LT	FY14-15		34500.00
Design	Power	Onsite-LT	FY14-15		402500.00
Design	Infra	Onsite-LT	FY14-15		402500.00
Inspection Expediting	Power	Onsite-LT	FY14-15		402500.00
		Total		400.00	184347211.21

Showing 1 to 45 of 45 entries

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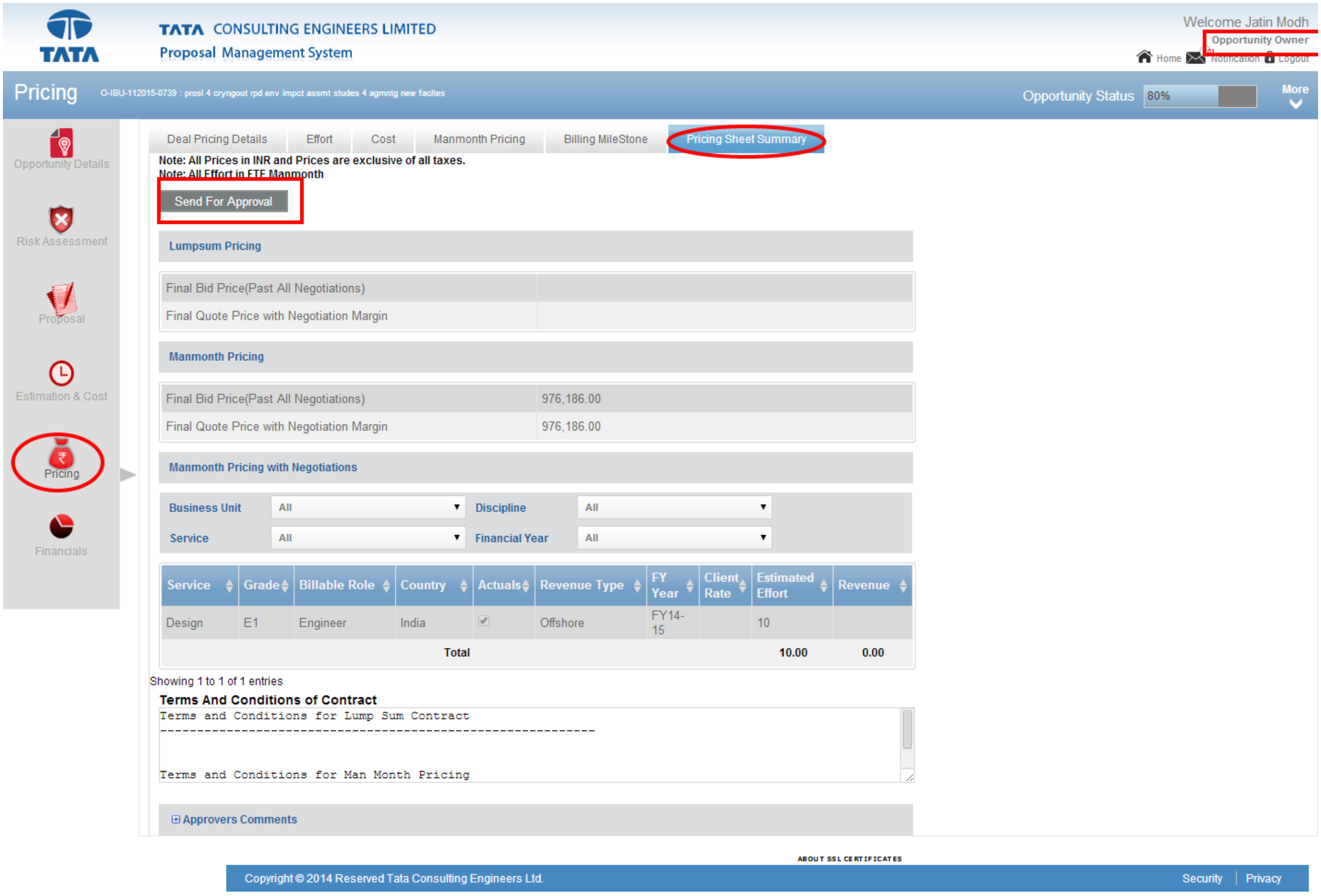
11 STAGE 7: Proposal Approval & Submission

11.1 Proposal Approval Cycle

11.1.1 Send Proposal For Approval

When the pricing stage tasks are done then Opportunity Owner sends proposal for approval by clicking on "Send For Approval" in "Pricing Sheet Summary" tab. Once this done, Proposal Reviewer, Pricing Reviewer, Proposal Approver are added in Team. There might be 2 Proposal Approvers in team.

These Approval authority members are decided based on Approval Matrix configuration set in Admin section. Please refer to section 9.7 (Pricing Sheet Summary) to know about logic used to decide approval authority members.



11.1.2 Review Proposal

Now "Proposal Reviewer" has the privilege to "Approve" or "Reject" the Proposal submitted by opportunity owner.

Steps to Approve or Reject the Proposal by the Proposal Reviewer:

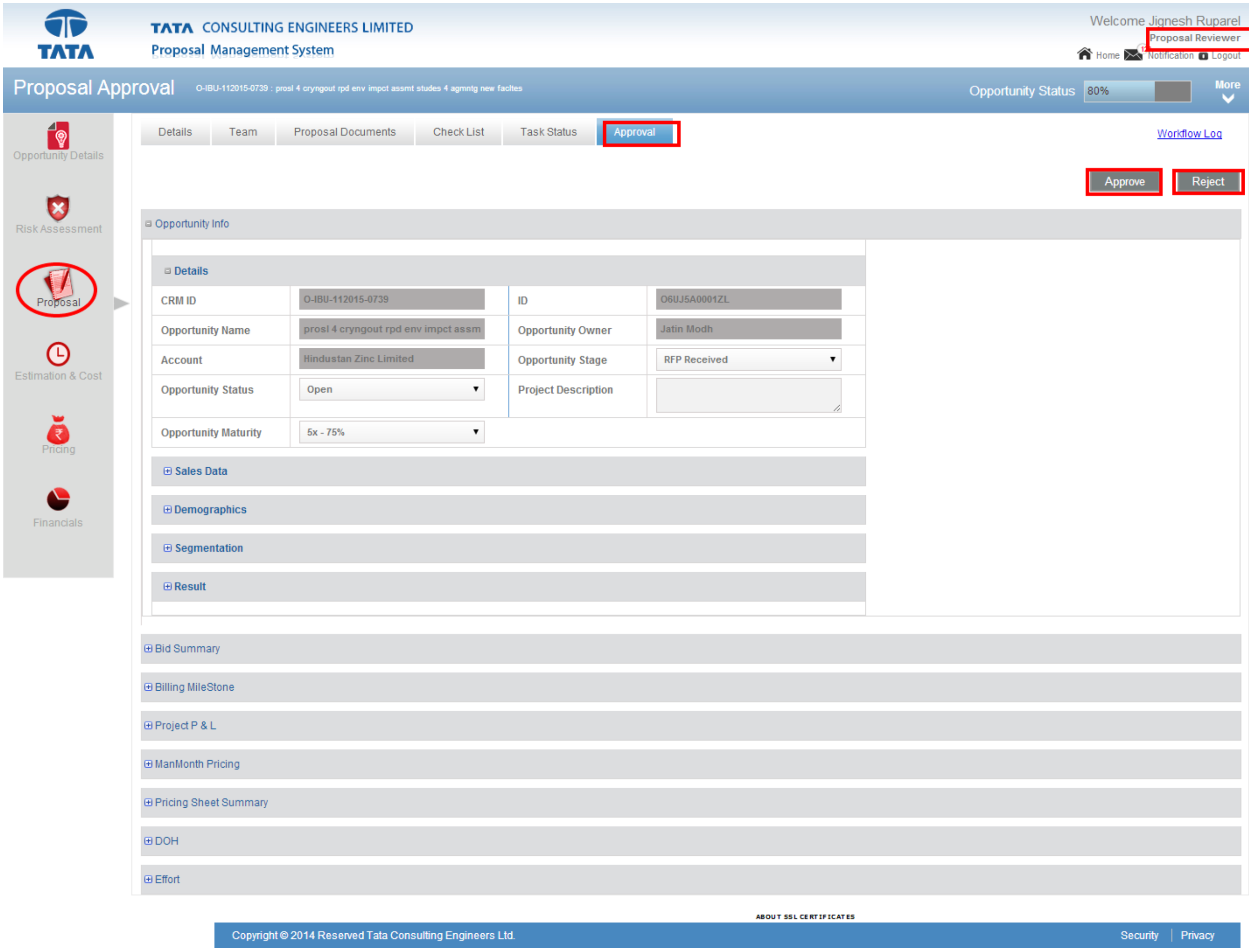
Step 1: Click on the Left Navigation Link Proposal.

Step 2: Click on the tab Approval.

Step 3: Reviewer can view all pricing and financial data for that Proposal.

Step 4: Reviewer can update Pricing sheet or Billing milestone data. This again re-determine higher approval authority members i.e. it may result in change in Pricing Reviewer, Proposal Approvers. But approval cycle is not shortened, it can only get extended i.e. Approver2 can only get added in team but it will not be removed even though according to updated parameters Approver2 is not required.

Step 5: Click on the "Approve" or the "Reject" button to Approve or Reject the Proposal.



11.1.3 Review Proposal Financial

Similarly "Pricing Reviewer" has the privilege to "Approve" or "Reject", once the Proposal approved by Proposal Reviewer.

Steps to Approve or Reject the Proposal by the Proposal Reviewer:

Step 1: Click on the Left Navigation Link Proposal.

Step 2: Click on the tab Approval.

Step 3: Pricing Reviewer can view all pricing and financial data for that Proposal.

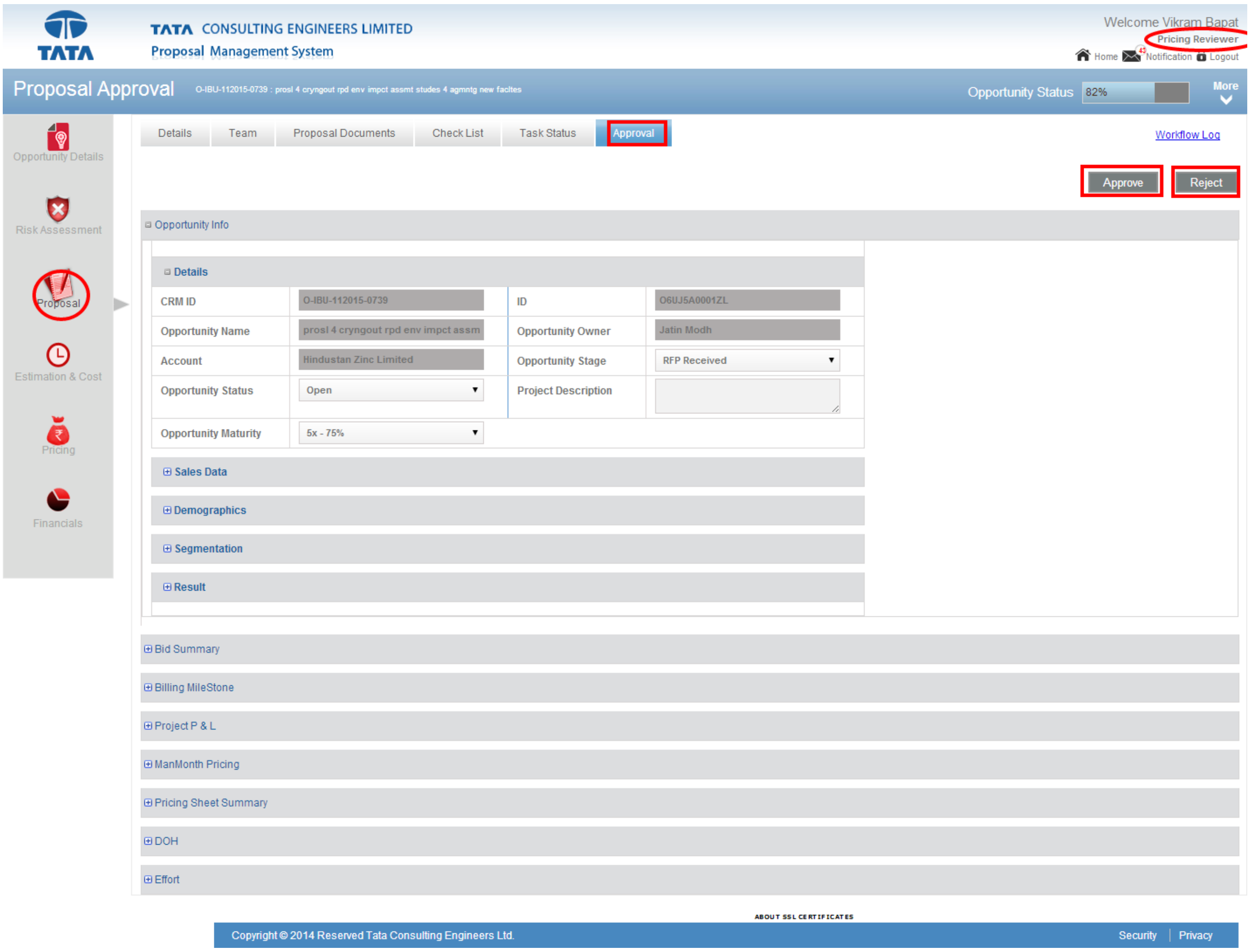
Step 4: Reviewer can update Pricing sheet or Billing milestone data. This again re-determine same or higher approval authority members i.e. it may result in change in Pricing Reviewer, Proposal Approvers. But approval cycle is not shortened, it can only get extended i.e. Approver2 can only get added in team but it will not be removed even though according to updated parameters Approver2 is not required. If Pricing Reviewer himself get changed in Team then he is shown below message

"You are not authorized for the approval of current margin and revenue Limits.\n It is being redirected to XXX(YYY) for approval"

Here XXX is user name who is new pricing reviewer in team and YYY denotes his system role/designation.

Step 5: Click on the "Approve" or the "Reject" button to Approve or Reject the Proposal.

.



11.1.4 Approve Proposal

Similarly if proposal is approved by Pricing Reviewer then “Proposal Approver” can “Approve” or “Reject” the Proposal. Setps are same for Both Approver 1 and Approver 2.

Steps to Approve or Reject the Proposal by the Proposal Approver:

Step 1: Click on the Left Navigation Link Proposal.

Step 2: Click on the tab Approval.

Step 3: Proposal Approver can view all pricing and financial data for that Proposal.

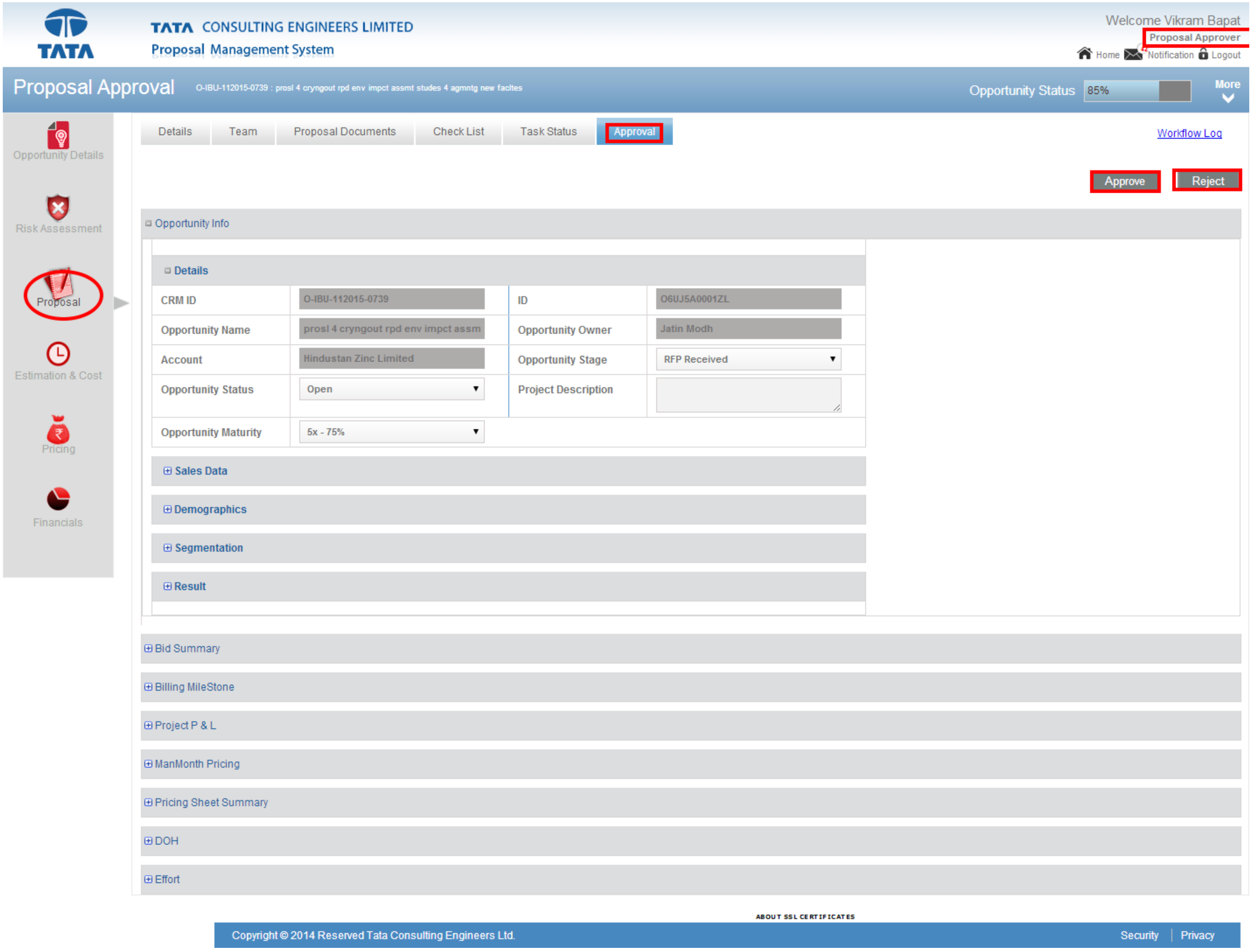
Step 4: Approver can update Pricing sheet or Billing milestone data. This again re-determine same or higher approval authority members i.e. it may result in change in Proposal Approver1 or Approver2. But approval cycle is not shortened, it can only get extended i.e. Approver2 can only get added in team but it will not be removed even though according to updated parameters Approver2 is not required. If Proposal approver himself get changed in Team then he is shown below message

“You are not authorized for the approval of current margin and revenue Limits.\n It is being redirected to XXX(YYY) for approval”

Here XXX is user name who is new pricing reviewer in team and YYY denotes his system role/designation.

Step 5: For Approver / Reject, Approver need to confirm transaction password. Approver can reset or change his password. Once authenticated, Approve, Reject button get enabled.

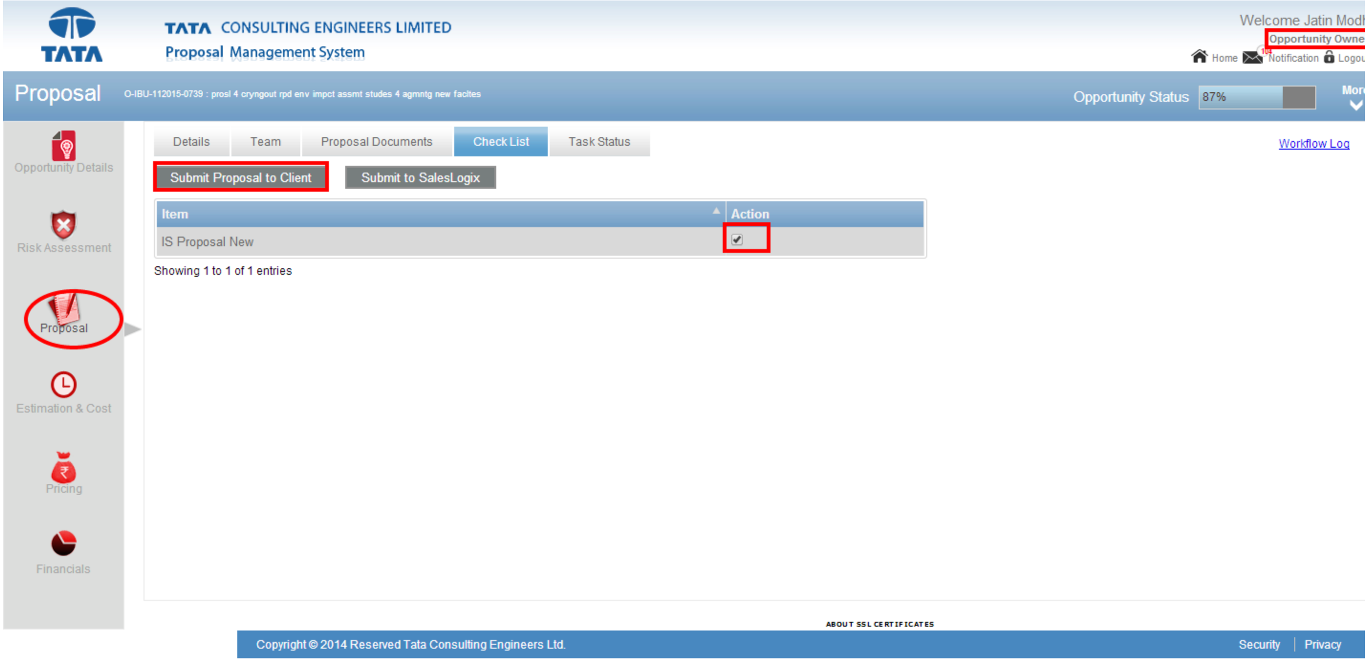
Step 5: Click on the “Approve” or the “Reject” button to Approve or Reject the Proposal.



11.2 Submit Proposal

Now on clicking “Check List” in “Proposal” tab Opportunity Owner come to the below screen.

Owner can submit the proposal by clicking on “Submit Proposal To Client”.



12 STAGE 8: LOI

Opportunity Owner can uses this screen to upload all the official contract documents related to the opportunity. LOI document is needed to upload only when opportunity is won. In case opportunity is lost, LOI document need not to be uploaded.

After LOI submission (if needed), Irrespective of Opportunity is won or lost, Opportunity owner needs to update the Opportunity Maturity, Opportunity Status and Result Data accordingly so as to close the Opportunity.

In case Opportunity is lost, Opportunity owner needs to update “Lost to Competitor” and “Reason” fields as displayed below.

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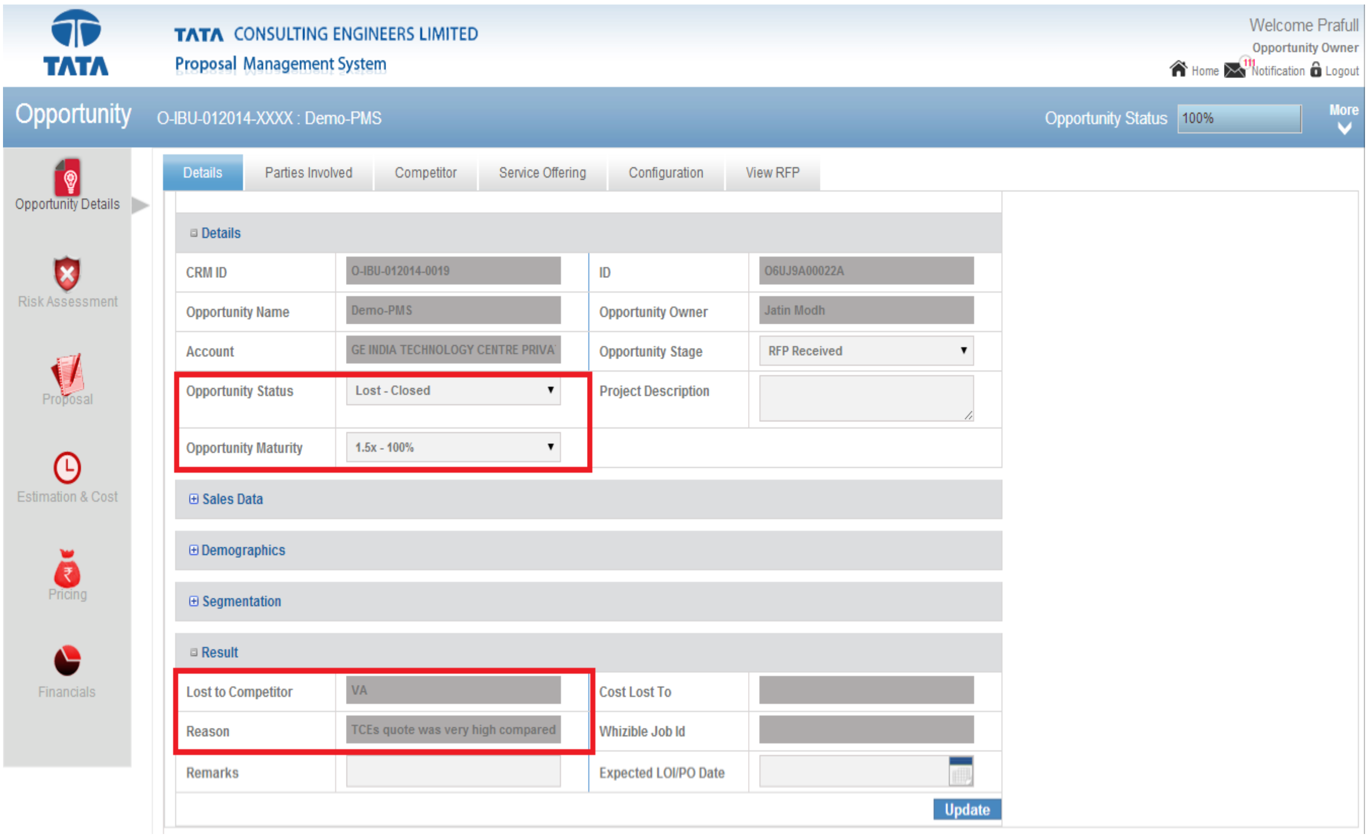

In case Opportunity is won, Owner should update Whizible Job Id.

13 APPENDIX

13.1 Roles and Responsibilities

Organizational Role	Details
System Admin	System Administrator
BU Head	Head of Business Unit
HoD	Head of Delivery
Top Management	Person who approves a big proposal
Proposal coordinator	Person responsible for detailed proposal creation(Technical/Costing)
Opportunity Owner	Person who is responsible from the sales side
Sector Head	Head of sector
Sales Head	Head of sales department of particular BU
Proposal Engineer	Proposal Engineer
Proposal Reviewer	Person who Reviews Proposal
Pricing Reviewer	Person who Reviews pricing
Proposal Approver	Person who Approves overall proposal
Estimation Reviewer	Person who Reviews Estimates
Risk Assessor	Person Responsible for Assessment of Risk Templates
Estimation Approver	Person who Reviews Approver
ED	Executive Director

13.2 Stages of Opportunity

Name	Description
RFP Received	When opportunity is identified for Bidding
Risk Assessment	When proposal is Risk Assessment
Proposal Creation	When Proposal is being created
Proposal Estimation	When Proposal is being estimated
Proposal Review	When Proposal is being reviewed
Proposal Submission	When Proposal is being submitted
Proposal Shortlisted by Customer	When Proposal has been selected and LOI is expected
Proposal Evaluation by Customer	When Proposal is being evaluated by customer
Negotiation Start	When negotiations have started
Negotiation Complete	When negotiations are complete
LOI Received / Lost	When LOI has been received or lost
Contract /PO Received	When contract is being received

13.2.1

13.3 Status of Opportunity

Name	Description
Open	When work is being done on the opportunity
In Progress	Opportunity is in progress
Jackpot	Unexpected Win
Max	Max
Min	Min
Abandoned	Opportunity is Abandoned
Deferred	Opportunity is Deferred
Won - No LOI	Opportunity is Won LOI Expected
Won - Closed	Opportunity is Won LOI Accepted
Lost - Closed	Opportunity is Lost and Closed

13.4 Partner Function List

Name	Description
Prospect	Client
Alliance Partner	Partner/Associate for the Opportunity
Lead Office	Office that leads the opportunity for TCE
Delivery Office	Delivery Office for TCE
Competitor	The competitors for the bid
Deal Influencer	The external Party that can influence the deal

13.5 Services

Code	Service Name	Description
S0001	Design Engineering	Design Engineering Service
S0002	Construction Supervision	Construction Supervision Service
S0003	Inspection Expediting	Inspection Expediting Service
S0004	Startup commissioning	Startup commissioning Service

13.6 Service Category

Name	Description
Design	Design Service Category
Construction	Construction Service Category

13.7 Risk Templates

Template Name	Description
Technical	Consolidated Technical risks in bid
Financial	Consolidated Financial risks in bid
Legal	Consolidated Legal risks in bid
Commercial	Consolidated Commercial risks in bid
HR	Consolidated HR risks in bid

13.8 Risk Status

Name	Description
Pending	Risk evaluation is not done
Completed	Risk evaluation is completed

13.9 Risk recommendation

Name	Description
GO	Opportunity moves to next stage with GO status
NO-GO	Opportunity with NO-GO status is completed and gets closed

13.10 Proposal Type

Name	Description
New	Not related to any ongoing projects/proposal
Extension	Additional work for an ongoing project / proposal
Claim	Claim for cost overrun on an existing project

13.11 Proposal Tasks

Name	Description
Proposal Creation	Creation of the Proposal
Estimation Review	Reviewing the Estimate
Proposal Review	Reviewing the Proposal
Proposal Approval	Approving the Proposal

13.12 Payment Type

Name	Description
Lump-sum	Fixed price decided for the entire project
Actuals	Time and material based billing
% Basis	Billing based on % of total cost of the project

13.13 Bid

Name	Description
Firm bid	Firm bid for customer
Budgetary bid	Budgetary bid for customer

13.14 BU (Business Units)

Name	Description
Power	Power Business Unit
Infrastructure	Infrastructure Business Unit
Chemical	Chemical Business Unit
Steel and metals	Steel and metals Business Unit
Nuclear	Nuclear Business Unit
Construction	Construction Business Unit

13.15 Currency

Name	Description
INR	Indian rupee
USD	United States dollar
AUD	Australian dollar
SGD	Singapore dollar
AED	United Arab Emirates dirham
GBP	Pound sterling
EUR	Euro

13.16 DOH (Direct Overheads)

Name	
Travel	Travel Related Expenses
Others	Others Expenses
Allowances	Allowances of Employee
Guest House / Hire Charges	Guest House Related Expenses

13.17 Billable and Non Billable

Name	Description
Billable	Time spent / Task done directly with the client or working on client projects for which the client can be directly Billed
Non Billable	Time spent / Task done indirectly for the client or on client projects for which the client cannot be directly Billed.

13.18 Reimbursable Expense and Non Reimbursable Expense

Name	Description
Reimbursable Expense	Expense which is reimbursed directly by the client while working with clients on projects.
Non Reimbursable Expense	Expense which is not reimbursed directly by the client while working with client on projects.

13.19 Revenue Type

Name	Description
Onsite –Long Term (Code: Onsite-LT)	Service Delivery at Overseas Location by employee deputed on Work Permit for Long duration. E.g. Engineer working in USA for 1 year.
Onsite –Short Term (Code: Onsite-ST)	Service Delivery at Overseas Location by employee deputed on Business Visa for Short duration. E.g. Engineer working in USA for 15 – 30 days.
Offshore (Code: Offshore)	Service Delivery from Company Delivery Center located in "Offshore Country" for Company e.g India for TCE or Qatar for TCE-QSTP
Offsite –Long Term (Code: Offsite-LT)	Service Delivery at Site Located in "Offshore Country" by employee deputed at site for Long Duration. E.g. Construction Engineers working at client site for 1 year.
Offsite –Short Term (Code: Offsite-ST)	Service Delivery at Site Located in "Offshore Country" by employee deputed at site for Short Duration. E.g. Design Staff working at client site for short period.

13.20 Status of LOI (Letter Of Intent)

Name	Description
Approved	When the formal Letter of Intent has been approved
Accepted	When the formal Letter of Intent has been accepted
Rejected	When the formal Letter of Intent has been rejected