

Introduction to MobileERP AI ROWE System

10x Work with MobileWXM: Work Experience Management

ROWE: Result Only Work Environment

ROWE: MobileERP Suite

10x Work: MobileWXM [Show how?](#)

10x Sales: MobileCXM [Show how?](#)

10x Delivery: MobileSXM [Show how?](#)

10x Retention: MobileEXM [Show how?](#)

10x Profit: MobileFXM [Show how?](#)

10x Freedom: MobileMXM [Show how?](#)

A **Work Experience Management System** is a structured approach that helps organizations manage their tasks, teams, and resources efficiently. It aims to streamline workflows, optimize productivity, and achieve business goals.

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

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

MobileWXM SoftRobot System for Work Management – 10 Modules

My Daily Breifing Pending Work due as on 04/04/2024

- Emails <
- Meetings <
- Tasks <
- Tickets <
- Holds <
- Reminders <
- Messages <
- Work >

MobileWXM

Workplace Experience Management

DBM: Dashboard Management

DBS: Daily Briefing System

GTD: Getting Things Done

ETM: Enterprise Task Management

DRS: Daily Reporting System

ECM: Ent. Collaboration Mgmt

ESP: Ent. Sharepoint Portal

DSS: Department Self Service

TSS: Travel/Claim Self Service

ESS: Employee Self Service

GTD, ROWE, DMS, PDCA, 8020

MobileCXM

Customer Experience Management

CRM: Customer Relation Mgmt

DMM: Digital Marketing Mgmt

TMM: Tender Marketing Mgmt

OMS: Offer Management System

SDM: Sales & Distribution Mgmt

SMS: Service Management System

PMS: Project Management System

COM: eCommerce Management System

CSS: Customer Support System

PLM: Product Lifecycle Mgmt

COPC, ISO, CXO, CANVAS

MobileSXM

Supplychain Experience Management

SCM: Supply Chain Management

PPP: Plan, Procure & Purchase

MFG: Manufacturing & Shopfloor

EPC: Engg., Procure, Construction

IMS: Inventory Management Systems

LMS: Logistics Management Systems

EAM: Enterprise Asset Management

MMS: Maintenance Mgmt Systems

QMS: Quality Management System

SCS: Seller Center Portal

APICS, MRP, LEAN, PMI, 5S

MobileEXM

Employee Experience Management

HCM: Human Capital Management

TLM: Travel & Leave Management

TOM: Time Office Management

PAY: Staff Payroll Management

WAG: Labour Wage Management

LMS: Learning Management Sys

PGM: Performance & Goal Mgmt

PAM: Personal & Administration

LEG: Legal Management System

FOR: Front Office Reception

PCMM, HRBS, KPI, KRA, ISO

MobileFXM

Finance Experience Management

ACC: GL Accounts Management

FRM: Finance Resource Management

CSM: Costing & Spend Management

GST: Goods and Service Tax

EXM: Export Import Management

SEM: Strategic Enterprise Mgmt

CGM: Corporate Governance Mgmt

GRC: Governance Risk & Control

AAM: Account Audit Management

SMS: Security Management System

ABC, COPA, GAAP, RISK, RATIOS

MobileMXM

Management Experience Management

IDE: Int. Codeless Development Env.

EIM: ERP Implementation Mngt

ULM: User Lifecycle Management

UXM: User Experience Management

EPM: Enterprise Process Management

EBI: Enterprise Biz Intelligence

ECM: Enterprise Content Mgmt

ITM: IT Services Management

ITA: IT Asset Management

ISO: ISO Quality Management

CMMi, 6S, BPR, AIOP, ITSM, DEVOPS

My Daily Briefing System

- Email Inbox
- Meetings/MOMs
- Tasks/Activities
- Tickets/Holds
- Alerts/Reminders
- Chat Messages

MobileERP WXM=Work Experience Management = 10X Work output with ROWE Standards

A **Work Management System** is a structured approach that helps organizations manage their tasks, teams, and resources efficiently. It aims to streamline workflows, optimize productivity, and achieve business goals.

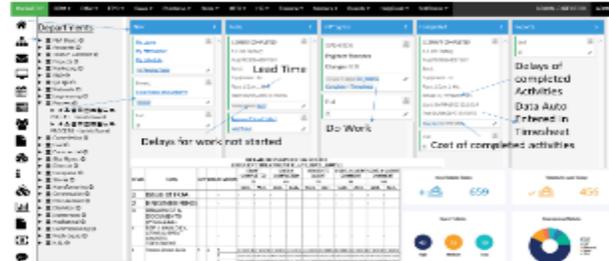
Leading



AI Managers

- Auto Delegation
- Delegates & Monitors Work*
- Assign duties
- Create Accountability

Working



AI Employees

- Auto TODO List
- Executes Work TODO List*
- Do Quality Work intime
- No Training required

Growing

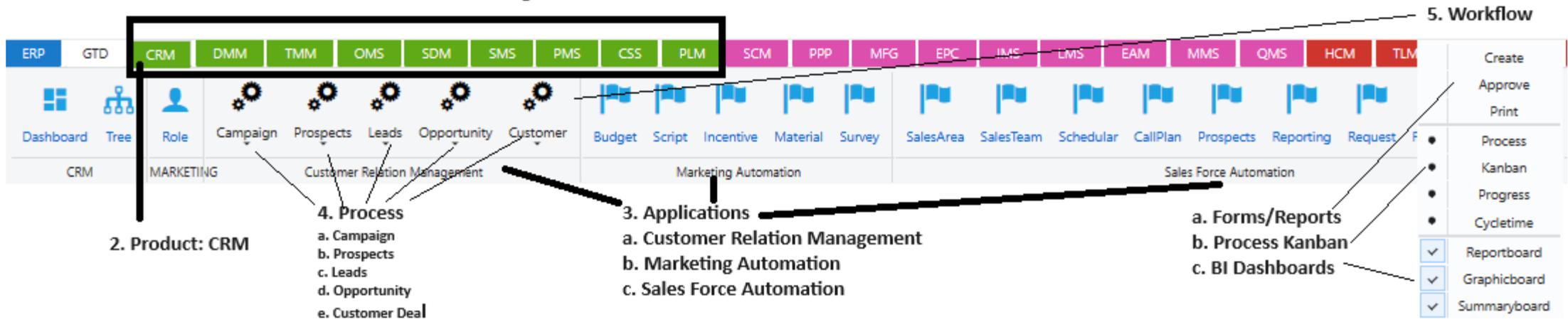


AI Directors

- Auto Reporting
- Monitors Processes & Delays*
- Manage Change
- Encourage Innovation

Everything Codeless

1. Solution: For Customer Management



MobileERP AI Director = DEAL Model = 6+ Systems , 60+ Software Products, 200+ Apps, 200+ BPA

Directors play a pivotal role in overseeing and managing company affairs, ensuring compliance, and making strategic decisions like ERP & AI. Responsibilities include creating systems & vision, overseeing business functions, and representing the company.

# DEAL MobileERP SoftRobot CORE CONCEPTS using 4 Hour Work Week DEAL Strategy of Tim Ferris																	
1 Define	Dream	+	Project	=	Goal	+	System	=	Plan	+	Action	=	Teams	+	Crew/Agency	+	Tools
<i>Definition</i>	<i>Dream is fantasies about something greatly desired.</i>		<i>Project specifies date on which you wish to achieve the dream</i>		<i>Goal is objective that the agent or human aims to achieve, it guides the agent in decision making process.</i>		<i>A Set of things working together like processes, plans and agents</i>		<i>A detailed process for doing or achieving something wrt time, budget and costs.</i>		<i>Action is doing something as per plan to complete tasks & achieve goals.This is actual work which needs to be done to execute</i>		<i>Team is a group of employees in project or department to achieve goal as per the plan.</i>		<i>Crew is Collaborative Group of AI Agents to execute a process or a plan to achieve goal</i>		<i>Tool or App is Skill or function that agents or humans can utilize to perform tasks.</i>
System	Backstory		Milestones		Targets		Process		Schedule		Task		Humans/Employees		AI Agents/Robots		Software Apps
<i>Definition</i>	<i>Provides context to the system, agents role and goal why needed.</i>		<i>A project milestone defines significant progress point.</i>		<i>I want to increase profits to \$3m/week within 90days(weekly growth of 11%) via my new CRM System</i>		<i>Defined Process tells us how to executes task by agents or humans</i>		<i>Schedule is a plan for carrying out a process as per intended events and time.</i>		<i>Tasks are Individual Assignments that Agent or Human Complete as per planned scheduled date and time for that process and goals.</i>		<i>Employees are member of team with a specific skills and a job to do as per Role assigned.</i>		<i>Agent is a member of crew with a specific AI codes and a defined jobs to do.</i>		<i>An AI tool is an software program that leverages AI models and algorithms to perform a specified task.</i>
<i>Features</i>	<i>Occurance: 20pa Success: 5pa Failures: 15pa Reviews: Monthly Actions: Monthly</i>		<i>Occurance: 50pa Success: 25pa Failures: 25pa Reviews: Weekly Actions: Weekly</i>		<i>Goal Target: \$3m/week System to achieve: CRM Plan: Time-related: 90 day Measurable: 11% growth Assignable: To Team</i>		<i>Sequential Hierarchical Consensual Escalation Roleswapping</i>		<i>OnCompletion BOMExplosion Timebased UnAttended AbsentResource</i>		<i>Checklist/DrillDrive/Timesheet Tickets/OnHold/MOM Check/Validate/Enter/Approve Print/Email/Share/IVR Call Chat/Scan/Upload/Meeting</i>		<i>Perform Task DIY Assign Task GTD Make Decisions Communicate Collobarote</i>		<i>Execute Task DIY Assign Task GTD Make Decisions Communicate Collobarote</i>		<i>Data Search Tools Data Read Tools Data Write Tools Data Analysis Tools Data Tracking Tools</i>
2 Eliminate	Emails		MS Office		Meetings		Tasks		Tickets		Holds		Repetitive Work		Human Work		Software Menus
<i>Activities that needs automation</i>	<i>Read, File, Plan to respond, Compose and Send Email,</i>		<i>Create Office documents PPTs, Excel etc.</i>		<i>Organize meetings based on certain critical Project Tasks, Emails, Tickets or Holds</i>		<i>Create PO, Bills, Invoice, Vouchers etc.ERP Docs</i>		<i>Create tickets against Meeting MOMs, Dynamic Cases, NCRs</i>		<i>Create holds against non availability of data or resource for the task on hand.</i>		<i>Let system do daily, weekly, etc. repetitive work as per schedule</i>		<i>Let system do non intelligent, boring human work</i>		<i>Avoid complex menus and costly training by giving menuless system</i>
3 Automate	Emails		MS Co-Pilot		Meetings		Tasks		Tickets		Holds		Repetitive Work		Human Work		Software Menus
<i>AI Agents or AI Robots</i>	<i>Email Answering Agents can read emails, find data and reply emails</i>		<i>MS Office document creation agents build fast reports</i>		<i>Meeting Agents can schedule, organize, invite and write and distribute MOM with Action ticket to responsible people.</i>		<i>Task Agents can drive your ERP, CRM etc. based on process steps.</i>		<i>Ticketing Agent executes task by giving email reply, provide data or assign to human</i>		<i>Hold agents find and send data as needed by users Hold manager also can generate another holds to other people as per decision taken.</i>		<i>Repetitive work send daily, monthly reports to management, send renewal alerts etc.</i>		<i>Automate, Emails, Doc creation, Meetings, Tasks, Tickets, Holds, etc.</i>		<i>Automation system do not need menus. Only humans need menus which is also automated using todo list</i>
4 Liberate	WFH		ROWE		4HR WW		3 DAYS WW		END OF SLAVERY		RELOCATION		REMOTE CONTROL		WORK SUCKS		TRANSFORM
<i>How to liberate from 9x5 Office?.</i>	<i>Work from Home or Beach or anywhere</i>		<i>Result Only Work Environment</i>		<i>4 Hour Work Week possible for Owners, Directors, CEOs, VPs</i>		<i>3 Days work week possible for employees</i>		<i>Do not feel like slave wasting your time to get living.</i>		<i>Relocate to country you wish you would like to live. Or live like a traveller</i>		<i>Move your business from in-person to digital run by Robots</i>		<i>Robots do our work. We do not do boring work.</i>		<i>Start living in AI World full of robots today and save self.</i>

MobileERP AI EMPLOYEE = 4 Roles = Initiator, Planner, Executer, Management

An **employee** in a company plays several **critical roles and responsibilities** like Completing Assigned Tasks and Meeting Deadlines. Professionalism and Work Ethic, Following Company Policies and Procedures, Timely Quality Work and Daily Reporting via ERP

Team: Roles and Responsibility

Each member of the team knows exactly what results they need to achieve and by when.

INITIATOR > ERP Operator
Initiate: Enter/Approve/Print Document

PLANNER > Responsible Manager
Plan: Assign/Delegate/Get Work Done

EXECUTER > Process Driver
Execute: DoWork/Filing/Meeting etc.

MANAGEMENT > Decision Maker
Control: Audit Work take action if delay

 SOFTROBOT
AUTOMATED DATA ENTRY 

 SOFTROBOT
AUTOMATED WORK DELEGATION 

 SOFTROBOT
AUTOMATED WORKING 

 SOFTROBOT
AUTOMATED DECISION MAKING 

 KOMAL RANA
ACCOUNTS 

 NIRAV N. M
PROJECTS 

 PRAVEEN.B.
PROCESS 

 SHRI KEWAL G. TULI
MANAGEMENT 

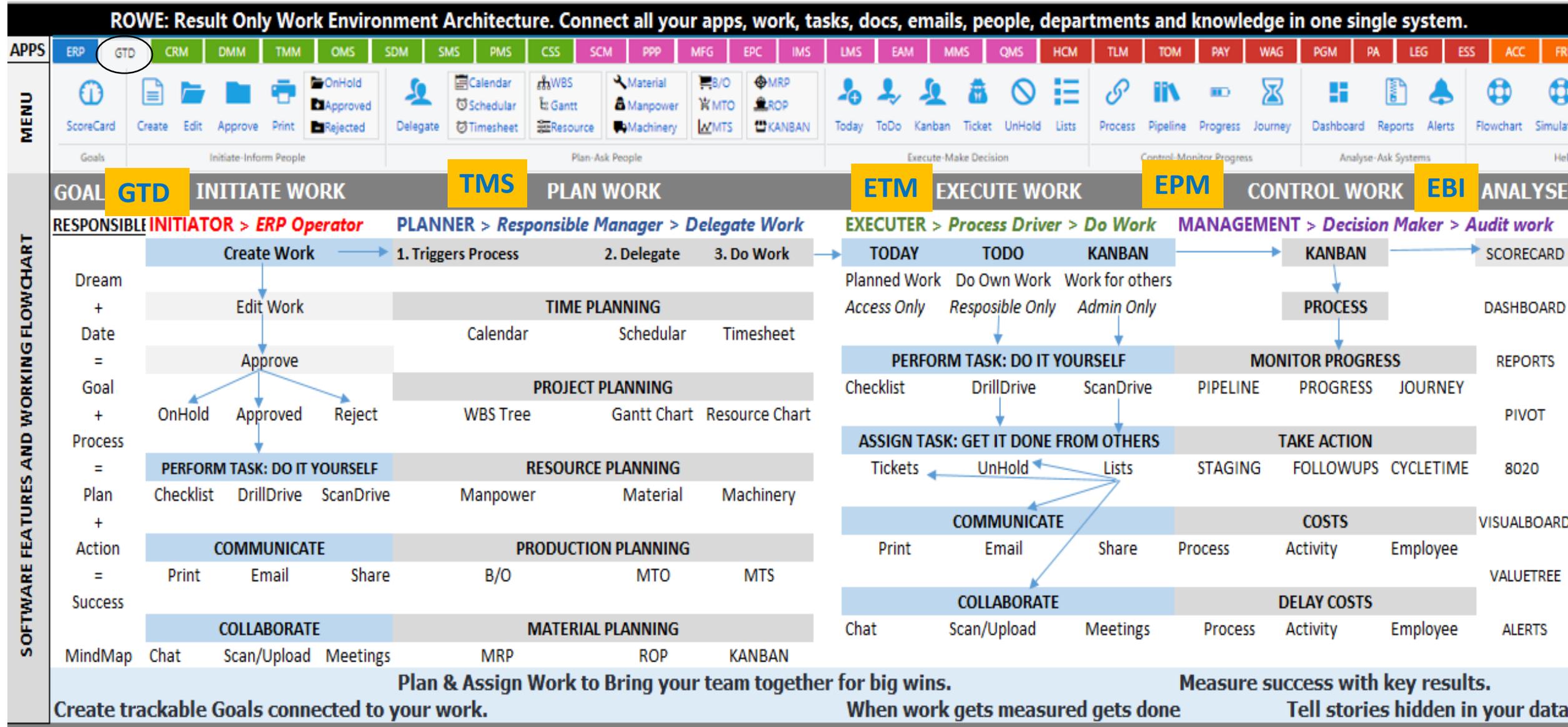
04/04/2024 16:09:48        

My Daily Breifing Pending Work due as on 04/04/2024

Emails	Meetings	Tasks	Tickets	Holds	Reminders	Messages	Work
To Answer All Emails 17565. 28/11/2023 19:08:21 >Basic Dedicated SSD Serve Database Mart LLC End 0	To Attend All Meetings 88.Venue: HO 4th Floor Conference Room TIME: 11:26 End 0	To Do All Tasks 723.SCM Procurement/Internal 6 6 Process Design Basis MR FOR Civil Contour Survey Work MR-PL: 640 personId: 58 - Delay: 0 days 2725.SCM Purchase 6 6 Process Design Basis UNAPPROVED PO RECEIVED AGAINST MR-	To Close All Tickets 203.CTC REPORT CHECKING Komal Rana End 0	To UnHold All Holds 55.PL/632 HRRL: Rev. 0 Greeshma Mishrad 63.CTC REPORT CHECKING ASHISH G. KANTAWALAd End 0	To Act All Alerts End 0	To Read All Chats Ledger Vouchers 261 messages LastMsg PAYMENTS 42 messages LastMsg BankBook for Reconciliation 261 messages LastMsg PURCHASE BILL/MIR 43 messages LastMsg PURCHASE	To Initiate All Work My Leave My Attendance My Timesheet My SelfService ERP Add/Approve Discuss DESIGN Add/Approve Master DEVELOP Add/Approve Master TESTPROCESS Add/Approve

MobileERP AI Manager = GTD > TMS > ETM > EPM > EBI Systems

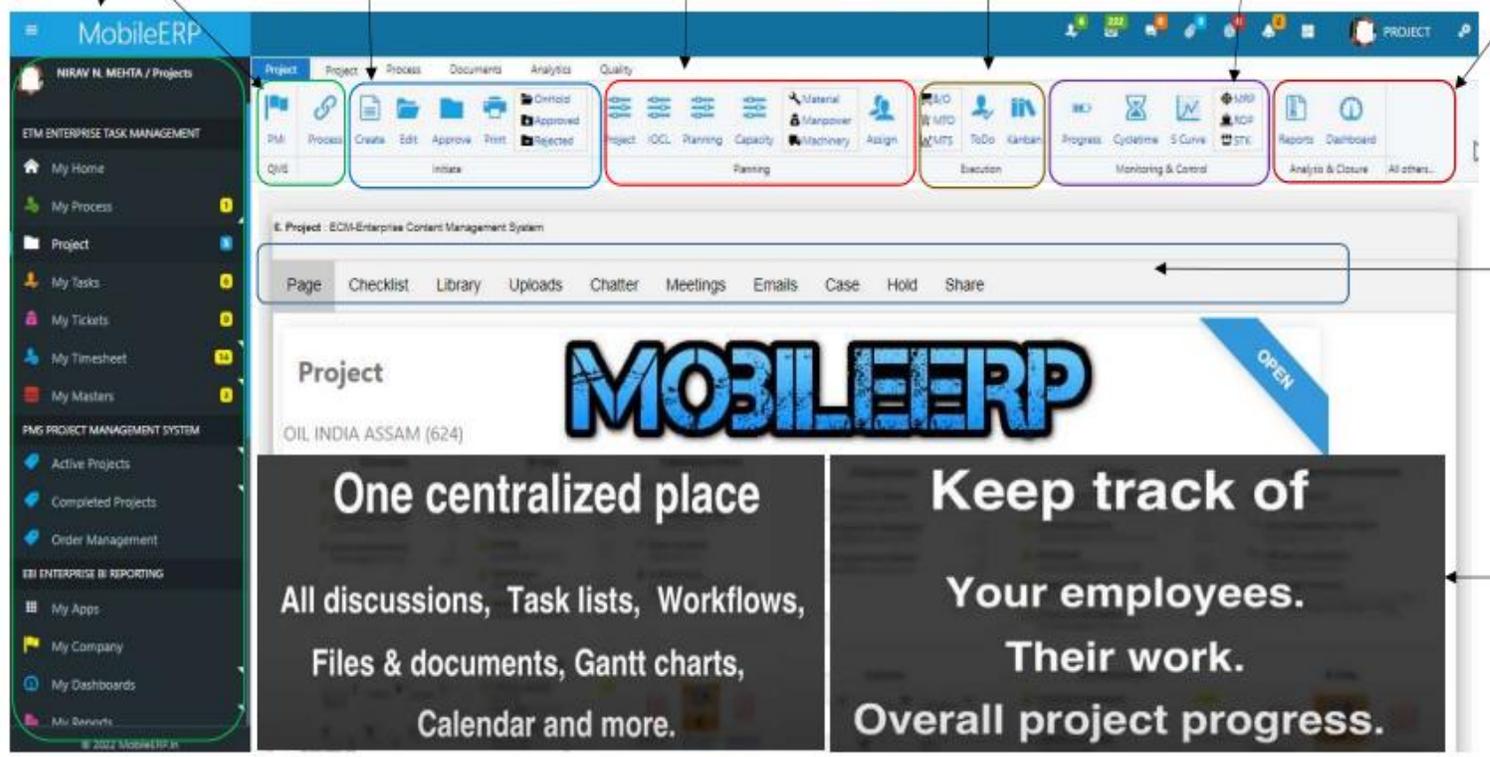
Managers create **business plans**, set objectives, and allocate resources effectively. They ensure that teams work toward achieving specific **targets and milestones**. Managers **structure work** by organizing tasks, roles, and responsibilities. Hire & train employees.



MobileERP AI Copilot System for Employees –GTD – Getting Things Done System

Getting Things Done (GTD): GTD is Work Management System which Organizes tasks into lists and clarifies priorities. It empower organizations to coordinate work effectively, utilize resources efficiently, and achieve desired outcomes!

- Organize**
 - Track your to-dos, delays & progress
 - Learn to manage your time and work
 - Practice Inbox Zero, clean your space
 - Create, Prioritize & Delegate Tasks
- Initiate**
 - Collect Data from Source
 - Create Document and start process
 - Upload necessary proofs to support
- Plan**
 - Assign Process Task RACI and GWD
 - Use Workload charts to balance
 - Use Calendar and reminders
- Execute**
 - Execute Process Steps via TODO List
 - Execute Process Steps via Kanban
 - Execute Process Steps via Meetings
 - Execute Process Steps Checklist
 - Execute Process Steps via Sharing
- Control**
 - Check Process Delays and act
 - Check Work Quality output and act
 - Take Go/NoGo Decision on Delivery
- Deliver**
 - Deliver Quality Product or Service
 - Deliver Bill or Necessary documents
 - Deliver Reports for Management
- Collaborate**
 - Work with teams in online mode
 - Reduce email and office pollution
 - Reduce delays and blame games
- Systems**
 - 5 Systems, 8 Modules per system
 - Organized based on stakeholders



- Collaborate**
 - Proofing/Printing
 - Discussion/Chat
 - In-Email Filing
 - Meetings/WFM
 - Hold/Announce
 - Share/Uploads
 - Cases/Library

- Systems**
 - PLM-Design Product
 - CRM-Sell Product
 - ERP-Deliver Product
 - HRM-Get Work done
 - QMS-ISO/6S/PMI/BRC
 - BPM-Process control
 - SAAS – Cloud Servers

MobileERP AI Copilot System for Employees –TMS – Time Management System

A **Time Management System** is a structured approach or method used by individuals or organizations to effectively **plan, prioritize, and allocate time** to various tasks and activities. The goal of time management techniques is to enhance productivity, optimize workflow, and achieve goals within stipulated timeframes:

MobileERP Time & Work Planner							
GOALS	Company	Departments	Roles	APPS	PROCESS	ACTIVITIES	DOCUMENTS
Assigned to Me	XYZ Co.	MARKETING	SALESMEN	CRM	OPPORTUNITY	QUALIFIED>FOLLOWUP>..	LEADS
INITIATE WORK	Documents	Approvals	Checklist	Drive	Reporting	Filing	Sharing
Work Tobe done by Me	Forms/Xls/Cad/pdf	Checking Todo	To Follow	Drill/Scan	Form/Punch	Doc Scan/Upload+Emails	Print/Email/Share/Chat
PLAN WORK	Emails	Meetings	Task	Ticket	Hold	Reminders	Reviews
I generate work for others	Sent to others	MOMs created	Delegated to others	Issued to others	Created on Others	Tickets created	Tickets created
EXECUTE WORK	Emails	Meetings	Task	Ticket	Hold	Reminders	Reviews
Generated by others for me	To Answer/To File	To Attend	Delegated to me	To Close	To UnHold	Renewals/Taxes/Payments	ToDo Daily as per plan
WORK	Workload	Calendar		Scheduler		TimeSheet	
My Time Planning	<i>Non planned work</i>	<i>Planned work in Process</i>		<i>Schedule Work as on DT: 1/1/2024</i>		<i>Daily Reporting as on DT: 1/1/2024</i>	
Tobe done by Me	<u>Unapproved Pending</u>	<u>DT: 1/1/2024</u>	<u>DT: 2/1/2024</u>	<u>TIME</u>	<u>WORK PLANNED</u>	<u>WORKDONE</u>	<u>TASK COMPLETED</u>
Campaign	10	3		3 10 TO 11	Campaign	Campaign	1
Leads	20	2		2 11 TO 12	Leads	Campaign	2
Opportunities	12	1		4 12 TO 1	Opportunities	Opportunity	1
Deals	3	1		5 1 TO 2	Deals	Deals	1
Generated by others	<u>Pending as on today</u>	<u>DT: 1/1/2024</u>	<u>DT: 2/1/2024</u>	2 TO 3	LUNCH	LUNCH	0
Emails - Unfiled	123	12		14 3 TO 4	Email - Filing	Email-Filing/Answering	4
Meetings - Invite	12	2		1 4 TO 5	Meeting	Meeting attended	1
Task - Todo	233	22		11 5 TO 6	Tasks	Meeting attended	1
Tickets - Todo	24	2		1 6 TO 7	Tickets	Tasks	21
Hold - To Unhold	3						
Reminders - Todo	4						

MobileERP AI Copilot System for Employees –ETM – Enterprise Task Management

GTD GETTING THINGS DONE

- My Workspace 5
- Mr 248
- lom 0
- Pr 2193
- Dci 196
- Project 183

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



Checklist

Kanban Card

Timelines

Tickets

Steps to Follow

- Start
- 1. Upload and Enter Approved Vendor List Itemwise Done on 30/01/2024 13:27:35
- 2. Upload MR in PDF/Excel Format Done on 30/01/2024 13:27:40
- 3. Upload and Enter Price Format / BOQ in Excel Done on 30/01/2024 13:27:48
- End **SENT TO MR**

MR 490. Print

RFQ 706. Print

RFQ 707. Print

RFQ 706. QUOTE. Show

RFQ 707. QUOTE. Show

PR NOT CREATED

Add New Case/Ticket

My Work Tickets

- Draft
- ToDo
- InProgress
- Completed

Ticket **Assign** ToDo Doing Done

My Case/Tickets

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

Step# Step Assigned To Target Done

New dd-mm-yyyy **Add**

Hold

OnHold Documents

My Hold

Active Hold

Hold History

OnHold Document

Person Responsible for this Hold ..

Reason for Hold:

Type why you want to hold this document?.

OnHold

MobileERP AI Copilot System for Employees – EPM – Enterprise Process Management

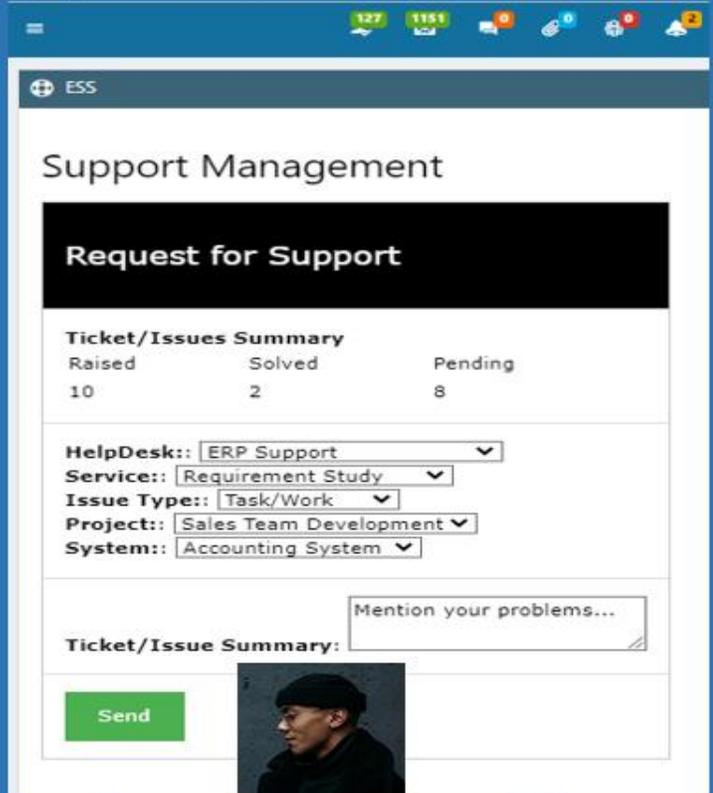
MobileERP powered by SoftRobot codeless programming tool - Platform Tour



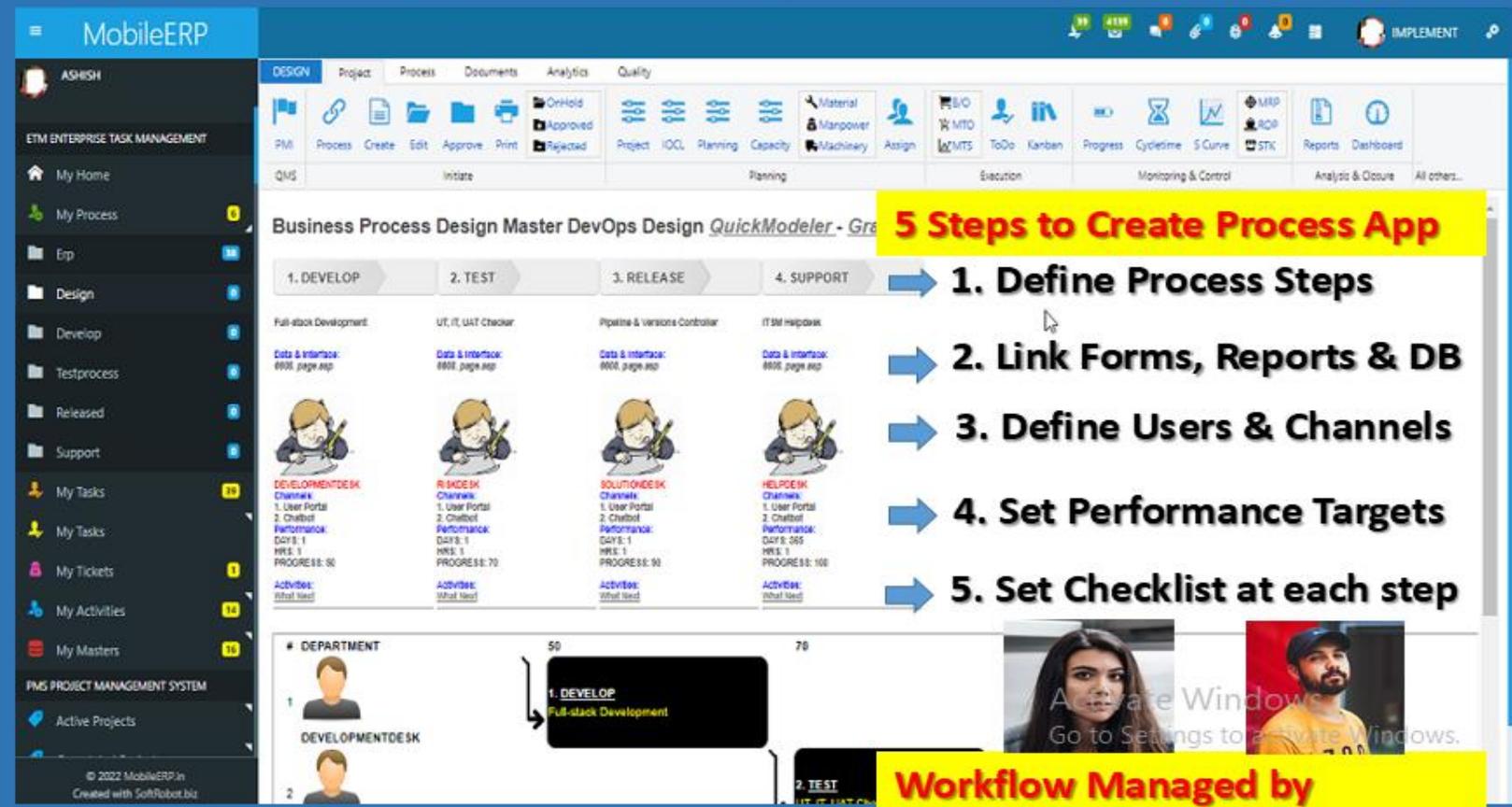
Digital Process Automation Software : Go beyond ERP with workflow based ERP

This is customer or end user app user portal/self service

This is SoftRobot App Studio, the low code authoring experience that powers the applications, process and users



End user Application Used by Clients, Employees and Managers



5 Steps to Create Process App

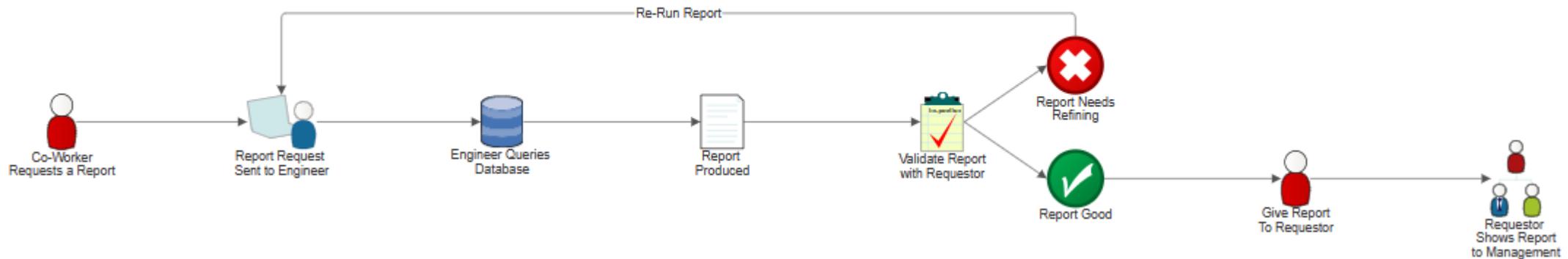
- ➔ 1. Define Process Steps
- ➔ 2. Link Forms, Reports & DB
- ➔ 3. Define Users & Channels
- ➔ 4. Set Performance Targets
- ➔ 5. Set Checklist at each step

Workflow Managed by Business and IT Persons

MobileERP AI Copilot System for Employees – EBI – Enterprise Business Intelligence

SoftRobot Fabric Reports & Dashboard Developer AI Studio						
DATA SOURCE	DATA TRANSFORM	DATA STORE & SHARE		DATA CONSUME		
Data Factory	Data Engineering	Data Warehousing	Data Science	Real-time Analytics	Business Intelligence	Artificial Intelligence
<i>Produce data required</i>	<i>Prepare data to share</i>	<i>Provide fast data</i>	<i>Provide Knowledge</i>	<i>Make faster decisions</i>	<i>Make wise Decisions</i>	<i>Automate Decision making</i>
Link/Import/Load/Pull/RPA	Code/Connector/IOT	Dataset/Pipeline	ML/DL/ES Models	Alerts, Notifications	Reports, Dashboards	Chatbots / Alexa / Robots
<i>Datasets/Files/Emails/SM</i>	<i>SQL/APIs/PLCs</i>	<i>OLAP/Data Lake</i>	<i>Open AI Studio</i>	<i>Onscreen/email/sms</i>	<i>Matrics, Graphs, Pivots</i>	<i>NLP, GLP, ES, GPT, COPILOT</i>
OnCloud / OnPremise or OnWeb / OnMobile						

Make Report Workflow



Modern Codeless Self-service BI and Analytics Platform

Transform data into insights and actions in minutes without using any Analytics tools or 3rd party software. Turn raw data into insightful reports and dashboards without asking any IT Person to prepare for it. Track your key business metrics, see longtime trends, identify outliers and predict the future.

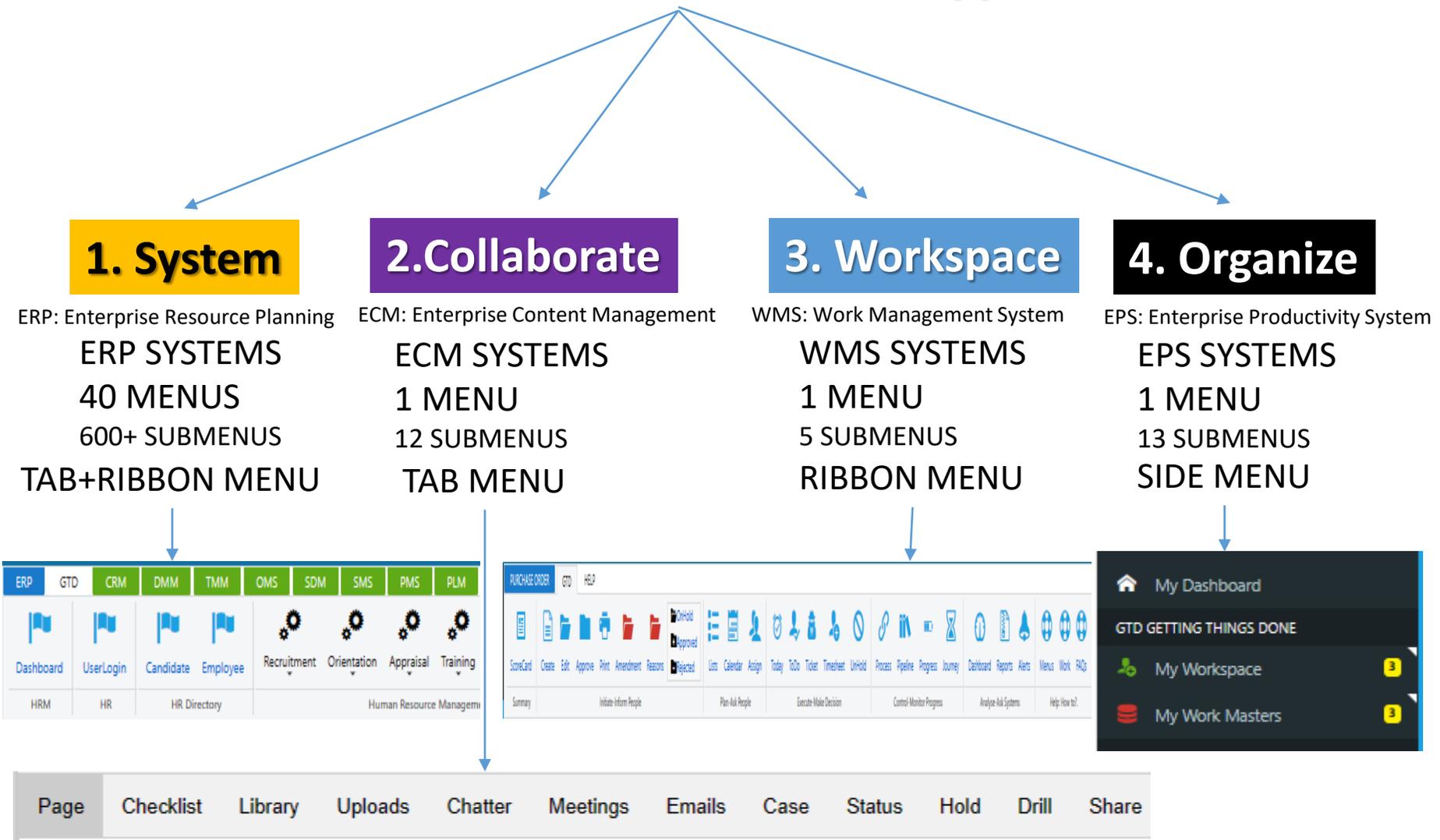
Start visualizing your data today without buying Analytics Software and hiring expert.

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

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

Organize	Track your to-dos, delays & progress Learn to manage your time and work Practice Inbox Zero, clean your space Create, Prioritize & Delegate Tasks
Initiate	Collect Data from Source Create Document and start process Upload necessary proofs to support
Plan	Assign Process Task RACI and GWD Use Workload charts to balance Use Calendar and reminders
Execute	Execute Process Steps via TODO List Execute Process Steps via Kanban Execute Process Steps via Meetings Execute Process Steps Checklist Execute Process Steps via Sharing
Control	Check Process Delays and act Check Work Quality output and act Take Go/NoGo Decision on Delivery
Deliver	Deliver Quality Product or Service Deliver Bill or Necessary documents Deliver Reports for Management
Collaborate	Work with teams in online mode Reduce email and office pollution Reduce delays and blame games
Systems	5 Systems, 8 Modules per system Organized based on stakeholders

MobileERP Menu Types



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

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

BLACK
GREEN
PINK
RED
ORANGE

ERP GTD CRM DMM TMM OMS SDM SMS PMS SCM PPP MFG EPC WMS LMS QCM PLM HCM TLM TOM PA WAG ESS PA ACC FRM CSM GST GRC EAM MMS

ScoreCard Create Edit Approve Print OnHold Approved Rejected Lists Calendar Assign Project Gantt Planning Capacity Material Manpower Machinery B/O MTO MRP ROP WMTS Today ToDo Kanban Ticket UnHold Timesheet Progress Journey SCurve Dashboard Reports Alerts Pipeline Process

Summary Initiate-Inform People Plan-Ask People Execute-Make Decision Control-Monitor Progress Analyse-Ask Systems Other

ORGANIZE
INITIATE
PLAN
EXECUTE
CONTROL
DELIVER

Work Done: Actual Performance

38 UnApproved	0 OnHold	0 Approved	0 Rejected
TILL DATE 38 documents	THIS MONTH 0 documents	TODAY 0 documents	LAST CREATED ON 20/07/2022 this documents
TODO 1 process activities	IN PROGRESS 15 process activities	DONE 275 process activities	TOTAL 291 process activities

Team: Roles and Responsibility

COLLABORATE

DRIVER ERP OPERATOR	APPROVER RESPONSIBLE MANAGER	CONTRIBUTOR PROBLEM SOLVER	INFORMED TOP MANAGEMENT
ASHISH G.			SURJEEVAL G. TULI

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

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

1. Page: will show your document data

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

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

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

5. Chatter will help you do chat with your team

6. Meetings will help you organize meeting for this work

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

The screenshot displays the MobileERP interface. On the left is a navigation menu with options like 'My Dashboard', 'My Workspace', 'My TaskList', 'My TodayList', 'My Tickets', 'My OnHoldList', 'My Timesheet', 'My Calendar', 'My Dailyreport', and 'My Documents'. The main area shows a Kanban board for 'DCI : ECM-Enterprise Content Management System - Schedule Activity ...'. The board has 12 columns labeled 1-12. Below the board is a table with fields like DCID, DCIDATE, DCINO, PROJECT, CALENDERID, UID, SITEID, TASK, and PROJECTMASTERID. A blue 'OPEN' button is visible on the right side of the table.

DCID	143	UID	49
DCIDATE	25/04/2022 13:52:28	SITEID	0
DCINO	1	TASK	Thickened Bio Sump Agitator
PROJECT	IOCL LUPECH	PROJECTMASTERID	91
CALENDERID	17		

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

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

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

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

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

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

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



GTD: Help on How to work with MobileERP Workspace

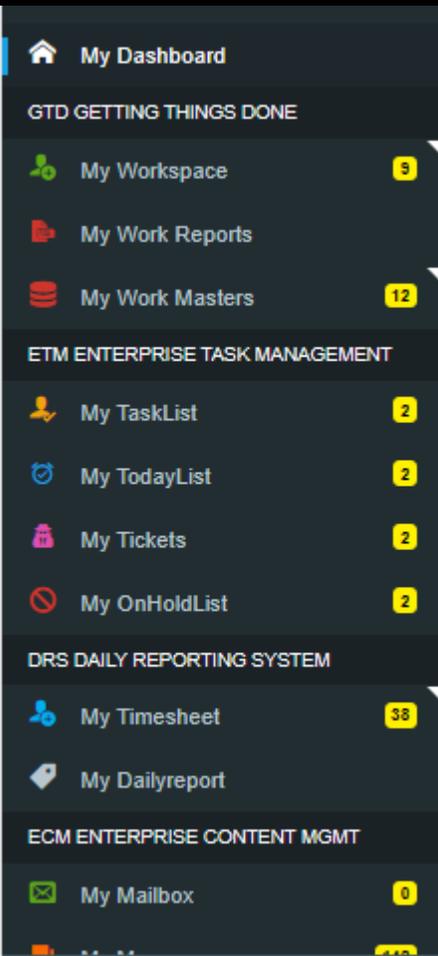
MobileERP Systems		GTD: Getting things done workspace				ETM: Enterprise Task Management						EPM: Enterprise Process Management				EBI: Enterprise BI/MIS Reports				
MOBILEERP WORKFLOW	MR TO PR	INITIATE-GENERATE WORK		PLAN-ASK PEOPLE TO DO WORK		EXECUTE-DO THE WORK/MAKE DECISIONS						CONTROL-MONITOR PROGRESS & CONTROL DELAYS				ANALYSE-ASK SYSTEM TO GIVE YOU REPORTS				
#	ATTENDED AUTOMATION	RESPONSIBLE	CREATE	APPROVE	PRINT	ASSIGN WORK	PROCESS STEP 1	PROCESS STEP 2	PROCESS STEP 3	PROCESS STEP 4	PROCESS STEP 5	PROCESS STEP 6	SCORECARD	PROCESS	PIPELINE	PROGRESS	JOURNEY	DASHBOARDS	REPORTS	ALERTS
#	DRIVER/INITIATOR	ERP OPERATOR	ENTER MR		PRINT MR															
#	APPROVER/PLANNER	MANAGER		APPROVE MR		GIVE PROCESS RIGHTS							CONTROL PEOPLE	CONTROL PROCESS	CONTROL PIPELINE	CONTROL DELAYS		MGMT PRESENTATION	DAILY CHECKING	TAKE URGENT ACTION
#	CONTRIBUTOR/EXECUTOR	PROCESS DRIVER					ENTER RFQ VENDOR LIST	SEND RFQ	ENTER QUOTE	SENDS TR TRT										
#	PROCESS DRIVER	ENGINEER								RECEIVES TR TRT	APPROVE TR	ENTER AND SEND PR								
#	VENDOR	SUPPLIER								RECEIVES RFQ	SENDS QUOTE	SENDS TR TRT								
#	MANAGEMENT/CONTROLLER	DECISION MAKER								COMPARE QUOTE	APPROVE QUOTE									
#	UNATTENDED AUTOMATION	RESPONSIBLE	RPA: COPY FROM SRC	RPA: RULE	RPA: ALERT	RPA: DECISION MAKER	RPA: COPY FROM SRC	RPA: EMAIL	RPA: OCR/HL5-FORM	RPA: REPORT	RPA: RULE ENGINE	RPA: COPY FROM SRC								
#	DIGITAL EMPLOYEE	ROBOT	AUTO FROM PROJECT	AUTO	AUTO ALERT GENERATED	AUTO BASED ON WORKLOADS	AUTO BY SYSTEM	AUTO EMAIL/SMS	VIA SUPPLIER PORTAL/CD	AUTO BY AI SYSTEM	AUTO	AUTO VIA AI								
#	TIMELINE	DAY	1	2	3	4	5	6	7	8	9	10	DAILY	ONCE	DAILY	WEEKLY	MONTHLY	WEEKLY WORK	MONTHLY WORK	DAILY WORK
C. MOBILEERP WORKFLOW	PR TO PD	INITIATE		PLAN		EXECUTE						CONTROL-MONITOR PROGRESS & CONTROL DELAYS				ANALYSE-ASK SYSTEM TO GIVE YOU REPORTS				
#	ATTENDED AUTOMATION	RESPONSIBLE	CREATE	APPROVE	PRINT	ASSIGN WORK	PROCESS STEP 1	PROCESS STEP 2	PROCESS STEP 3	PROCESS STEP 4	PROCESS STEP 5	PROCESS STEP 6	SCORECARD	PROCESS	PIPELINE	PROGRESS	JOURNEY	DASHBOARDS	REPORTS	ALERTS
#	DRIVER/INITIATOR	ERP OPERATOR	ENTER DRAFT PR		PRINT PR															
#	APPROVER/PLANNER	MANAGER		APPROVE PR		GIVE PROCESS RIGHTS							CONTROL PEOPLE	CONTROL PROCESS	CONTROL PIPELINE	CONTROL DELAYS		MGMT PRESENTATION	DAILY CHECKING	TAKE URGENT ACTION
#	CONTRIBUTOR/EXECUTOR	PROCESS DRIVER					SETUP ITEM MASTER	CHECK STOCK	IDENTIFY SHORTAGES	ENTER SUPPLIER/RATE	ENTER TERMS	FINALIZE DRAFT PO								
#	PROCESS DRIVER	MANITA																		
#	MANAGEMENT/CONTROLLER	DECISION MAKER					FINALIZE VENDOR/ITEM	TRANSFER STOCK	ORDER ITEM FINALIZED	NEGOTIATES RATES	NEGOTIATES TERMS	CHECKS DRAFT PO								
#	UNATTENDED AUTOMATION	RESPONSIBLE																		
#	DIGITAL EMPLOYEE	ROBOT	ITEM AUTO ENTRY	DRAFT PO	NOT REQ	AUTO BY SYSTEM	AUTO BY SYSTEM	AUTO VIA MRP	AUTO VIA MRP	AUTO BY AI SYSTEM	AUTO BY AI SYSTEM									
#	TIMELINE	DAY	1	2	3	4	5	6	7	8	9	10	DAILY	ONCE	DAILY	WEEKLY	MONTHLY	WEEKLY WORK	MONTHLY WORK	DAILY WORK
D. MOBILEERP WORKFLOW	PD TO MR	INITIATE		PLAN		EXECUTE						CONTROL-MONITOR PROGRESS & CONTROL DELAYS				ANALYSE-ASK SYSTEM TO GIVE YOU REPORTS				
#	ATTENDED AUTOMATION	RESPONSIBLE	CREATE	APPROVE	PRINT	ASSIGN WORK	PROCESS STEP 1	PROCESS STEP 2	PROCESS STEP 3	PROCESS STEP 4	PROCESS STEP 5	PROCESS STEP 6	SCORECARD	PROCESS	PIPELINE	PROGRESS	JOURNEY	DASHBOARDS	REPORTS	ALERTS
#	DRIVER/INITIATOR	ERP OPERATOR	EDIT DRAFT PO		PRINT/UPLOAD SIGNED PO		TICKET: CORRECT PO													
#	APPROVER/PLANNER	MANAGER		APPROVE PO		GIVE PROCESS RIGHTS	HOLD: PO FOR CHANGES						CONTROL PEOPLE	CONTROL PROCESS	CONTROL PIPELINE	CONTROL DELAYS		MGMT PRESENTATION	DAILY CHECKING	TAKE URGENT ACTION
#	CONTRIBUTOR/EXECUTOR	PROCESS DRIVER					PO SENT TO VENDOR		VENDOR DOC RCVD	MFG CLEARANCE	DISPATCH CLEARANCE									
#	PROCESS DRIVER	MANITA							ENGG REVIEWS		INSPECTION DONE									
#	PROCESS DRIVER	SITE									SITE INFORMED									
#	VENDOR	SUPPLIER										MIR CREATED								
#	MANAGEMENT/CONTROLLER	DECISION MAKER										EWARRANT/BILL SENT								
#	UNATTENDED AUTOMATION	RESPONSIBLE																		
#	DIGITAL EMPLOYEE	ROBOT	NOT REQ	NOT REQ	NOT REQ	AUTO BY SYSTEM	AUTO EMAIL/PORTAL	SUPPLIER PORTAL	SUPPLIER PORTAL	SUPPLIER PORTAL	SUPPLIER PORTAL	SUPPLIER PORTAL								
#	TIMELINE	DAY	1	2	3	4	5	10	15	15	20	20	DAILY	ONCE	DAILY	WEEKLY	MONTHLY	WEEKLY WORK	MONTHLY WORK	DAILY WORK

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

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

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

Organize Menu 1: Understanding your Menu – GTD System



GTD: Getting Things Done System

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

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

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

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

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

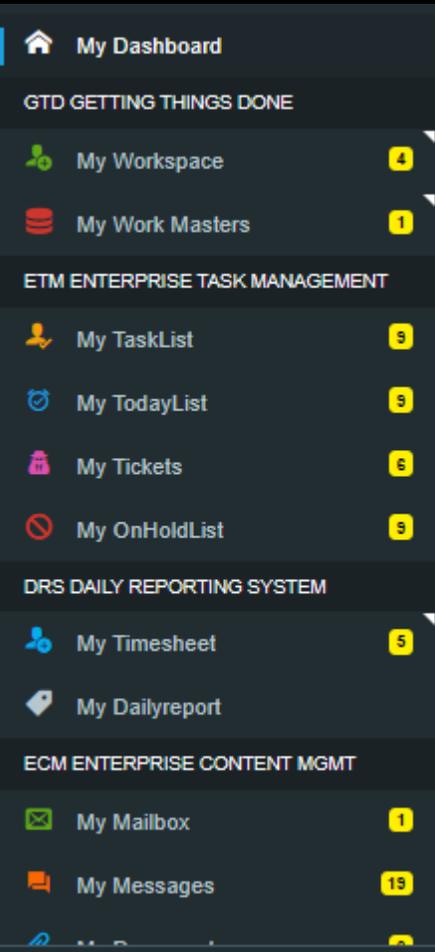
Engage: Get to work on the important stuff.

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

GTD System is made of 3 things:

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

Organize Menu 2: Understanding your Menu – ETM System



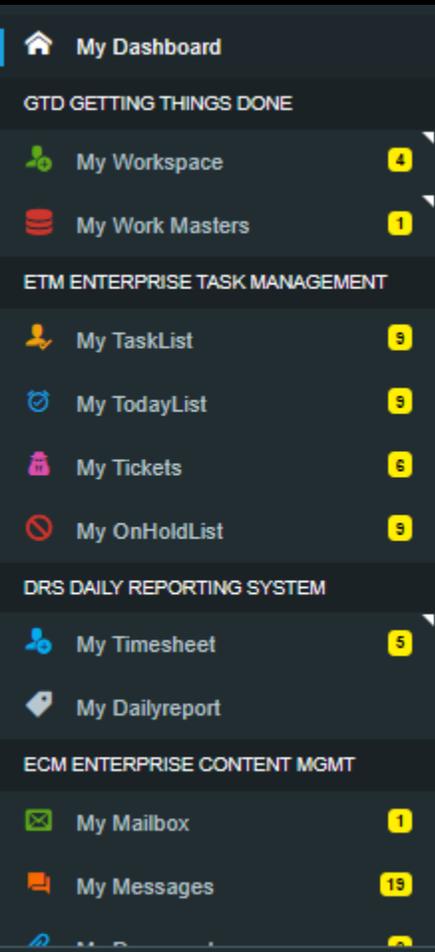
ETM: Enterprise Task Management System

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

ETM System is made of 6 things:

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

Organize Menu 3: Understanding your Menu – DRS System



DRS: Daily Reporting System

What Is a Daily Reporting System?

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

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

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

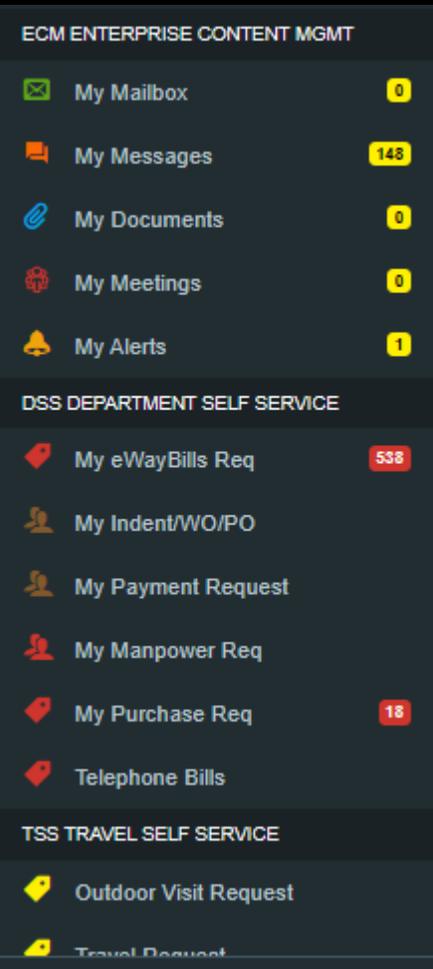
Daily reports keep your company updated on what has been completed in the past 24 hours. Using a daily report template ensures you don't spend your entire day typing up updates from scratch. A daily report template is a tool that offers daily status updates at 24-hour intervals. It delivers a high-level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

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

Benefits of a Daily Report System

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

Organize Menu 4: Understanding your Menu – ECM Systems



ECM: Enterprise Content Management System

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

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

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

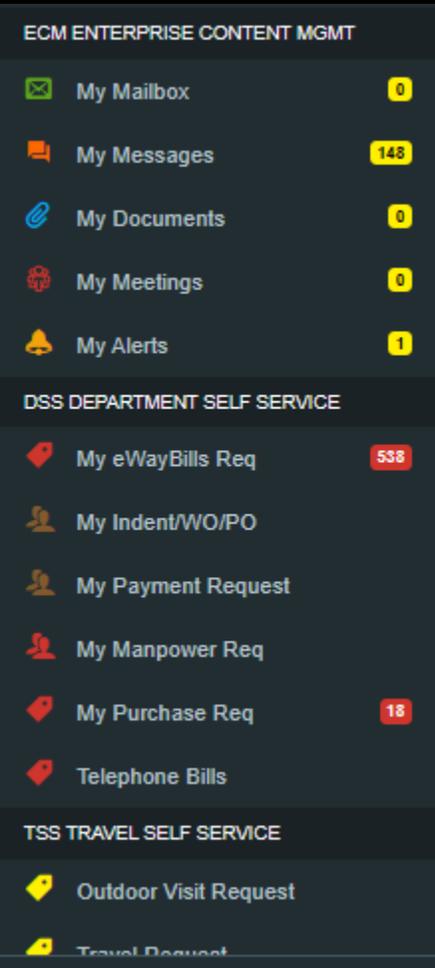
A Document Management System (DMS) is a subset of ECM that is used to manage documents only. It streamlines document workflows and simplifies regulatory compliance. DMS systems eliminate paper documents and the related filing systems. They digitize printed content and store it in a secure repository,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

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

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

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

Organize Menu 5: Understanding your Menu – DSS Systems



DSS: Department Self Service

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

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

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

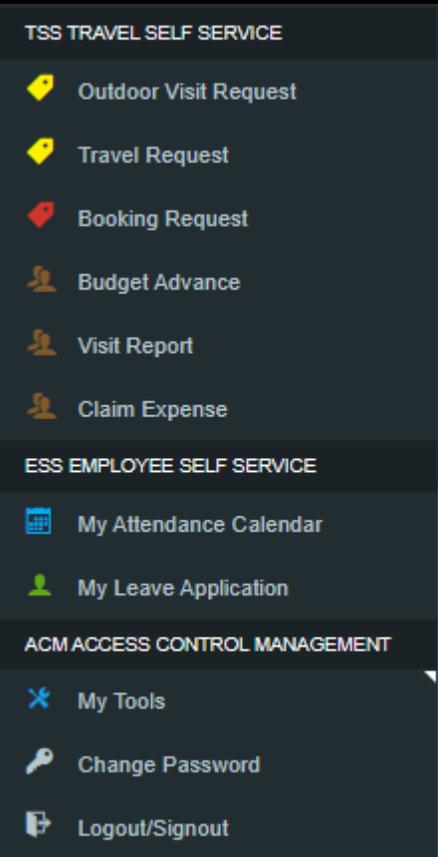
Payment Request: Using this documents every department has to make payment request to accounts department by uploading necessary proofs and explanation. It can be payment against Bills or Advance Payments for Tour or Travel etc.

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

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

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

Organize Menu 6: Understanding your Menu – TSS Systems



TSS: Travel Self Service part of Employee self service

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

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

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

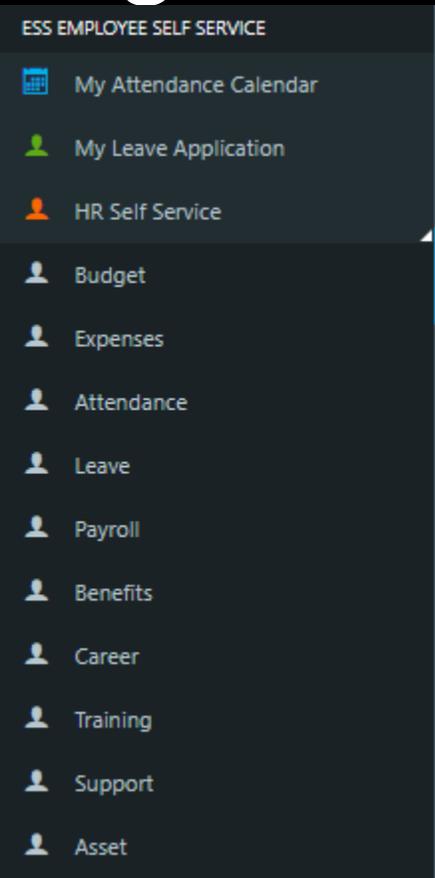
Booking Request: All employees can request to book Rail or Air Tickets or Hotel to Travel HelpDesk after Travel Request is approved.

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

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

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

Organize Menu 7: Understanding your Menu – ESS Systems



ESS: Employee Self Service

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

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

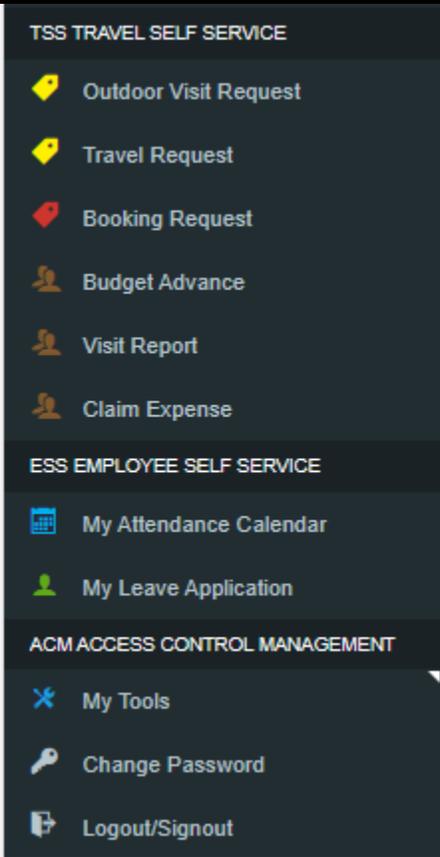
Leave Application: This is where employees can check their leave balance and submit leave application.

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

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

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

Organize Menu 8: Understanding your Menu – ACM Systems



ACM: Access Control Management

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

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

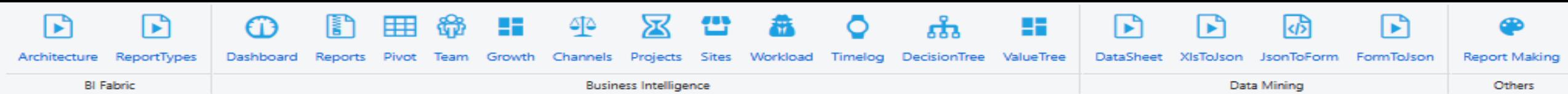
If employee is present and has done attendance machine punching then only he/she will be allowed to login in the system. Site Employees or Managers can login from their mobiles via internet also.

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

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

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

Organize Report Menu: Understanding your Menu – EBI Systems



Enterprise Business Intelligence (BI) refers to the strategic use of data and analytics within an organization to gain insights into various aspects of its operations. . These insights can span areas such as **sales, marketing, finance, processes, and human resources** Let's delve deeper into EBI.

Following codeless reports are auto created by system without using any commercial Excel, Analytics tool or AI Software's. Its purely codeless.

1. **Dashboards:** A **dashboard** is a visual display of the most important information needed to achieve one or more objectives. It consolidates and arranges relevant data on a single screen, allowing users to monitor critical information at a glance.
2. **Scorecards** are also Dashboards which provides process, document or person specific performance report. The score tells us how the unit performed.
3. **Reports:** A **report** is a nonfiction account that presents and/or summarizes facts about a particular event, topic, or issue. It serves as an organized document that communicates essential info to a specific audience for various purposes. It can be statement, Daybook or Register.
4. **Pivot:** PivotTable is more than just a static report—it's an **interactive way to explore your data** and gain insights!. It gives data in 3D/4D View.
5. **Team:** This is specialized codeless report which gives details of team performance. E.g. Sales Team Performance Target vs Actual.
6. **Growth:** This is specialized codeless report provides growth as per last year vs this year or time period as specified.
7. **Channel Performance Report:** This report evaluates the performance of different communication channels (such as email, phone calls, etc.)
8. **Projects Performance Report:** This report evaluates the performance of project wrt completed, pending, delays, costs, billing, collections etc.
9. **Sites Visual Report:** It shows powerful way to **communicate complex information** in a clear manner. It shows office, store, site etc layouts.
10. **Workload Reports:** It shows current workloads of every employee and departments so that you can check how much free time they have.
11. **Timelog Reports:** Based on punch, leave, ODvisit, travel and timesheet and actual work you can analyze every employees work.
12. **Decision Tree:** A **decision tree** is a powerful tool used in **supervised learning** for both **classification** and **regression** tasks. Its also a mindmap.
13. **Value Tree:** It empowers organizations to make informed decisions by visually connecting business values to underlying drivers. E.g. Profit
14. **80-20 rule report - Pareto Principle,** says **80% of outcomes (or outputs) result from 20% of all causes (or inputs)** for any given event.
15. **6Sigma Report:** This report gives sigma value based on total incident occurred and total failures based on set baseline.
16. **Process Cycle Time or Journey Report:** This reports tells us how much average time and cost a particular process takes to execute.
17. **Process Stage Reports:** This report tells us which stages are deadlog in process and needs improvement based on delays and costs.
18. **Kanban Report:** IT provides an ideal solution for visualizing the flow of work, tracking progress, and understanding the status of processes.
19. **Chatbot/ Reportbot / Convbot Report:** Its Generative AI based Reporting via co-pilot, or agent based on particular domain training provided in knowledgebase

Organize Project Menu: Understanding your Menu – PMS Systems

PMS PROJECT MANAGEMENT SYSTEM

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

PMS: Project Management System menu

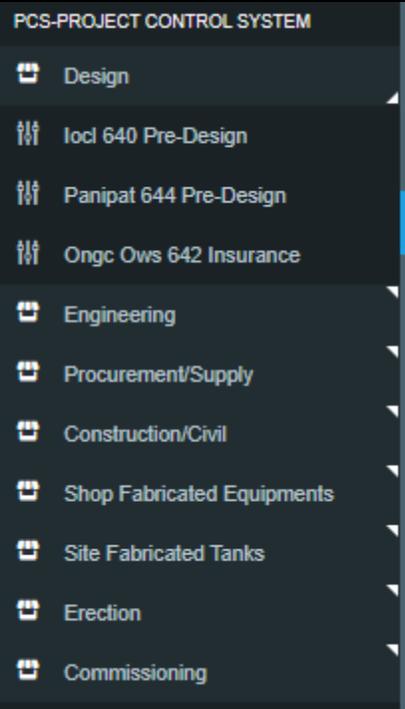
In the context of business, a project is a temporary endeavour undertaken to create a unique product, service, or result. Project management is the application of knowledge, skills, tools, and techniques to project activities to meet project requirements. Project management involves planning, executing,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

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

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

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

Organize Project Menu: Understanding your Menu – PCS Systems



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

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

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

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Contact MobileERP.in

www.softrobot.biz

www.mobleerp.in

Email: ashish@mobileERP.in

Whatsapp: +91-9925789204