

User Manual
For
UNIFIED PROJECT MANAGEMENT SYSTEM
(UPMS V2.0)



NIC West Bengal State Unit
National Informatics Centre
Ministry of Electronics & Information Technology, Government
of India

Vidyut Bhawan, Ground floor, Salt
Lake, Sector-II, Kolkata-700091

20th January, 2025

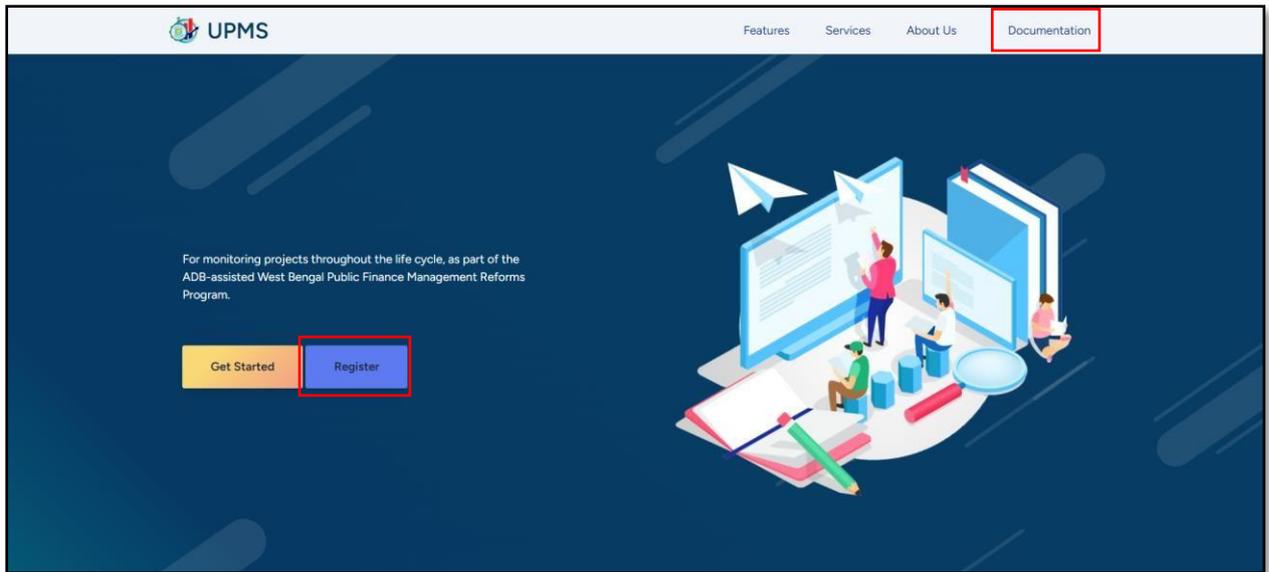
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1.

a) User Registration

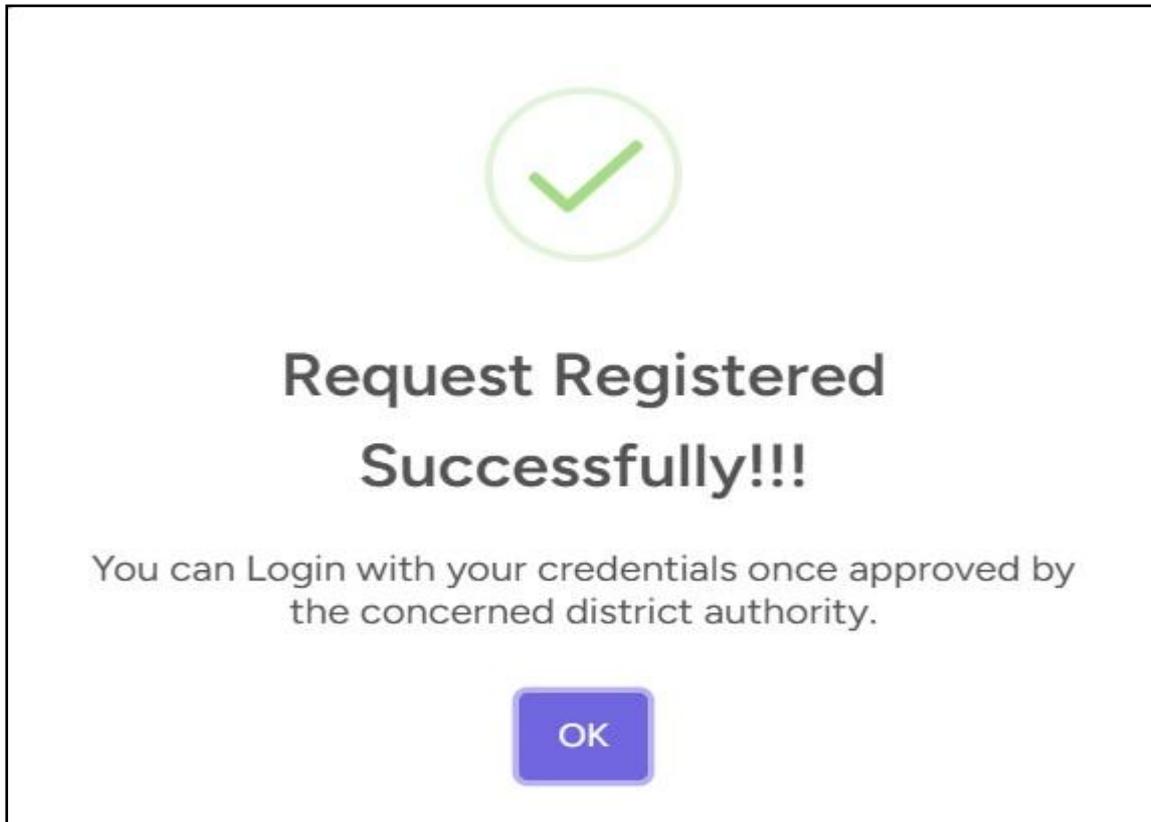
At First click on upms.wb.gov.in, this will redirect to the Home page of **UPMS** web application. From here click on the **Register** button.



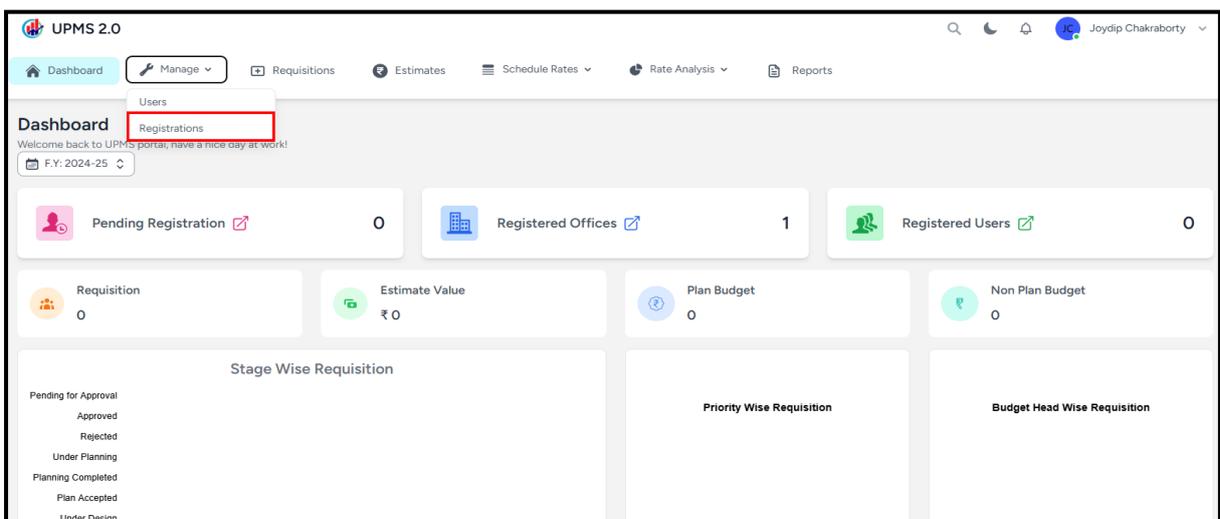
After clicking on the button it will redirect to a **Registration Form** like this, fill the form with proper information like **district, office, name, designation, mobile, email and password**. Finally click on Register button.

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Finally it will show a pop up like this, **Request Registered Successfully** but it not means that you can login at that time after giving your proper credentials.



Now, the **Department Admin** or **Office Admin** (which was selected as time of registration) will log in with his credentials. Then he have to click on registration under Manage dropdown.



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Here in the Registration page, find that particular user and click on **green right** button to on-boarding the user. Then show a pop-up screen to attach role.

User	Office	District	Date	Action
Kuntal ASSISTANT ENGINEER kuntal123@gmail.com 7963521250	Office of The Executive Engineer, Bardhaman Electrical Division, PWD Dte. PUBLIC WORKS Electrical & IT	DISTRICT: PURBA BARDHAMAN	21-Mar-2025 11:07 AM 22 seconds ago	 

Now, click on the user under **Role** dropdown. Select a role to assign the user. After Click on the **Plus icon**, then role is visible button section as a list. Finally, click on **save** button to approve the user.

ATTACH ROLE
Here you can attach role

ROLE *

Executive Engineer



 **Roles Added**

1. Executive Engineer

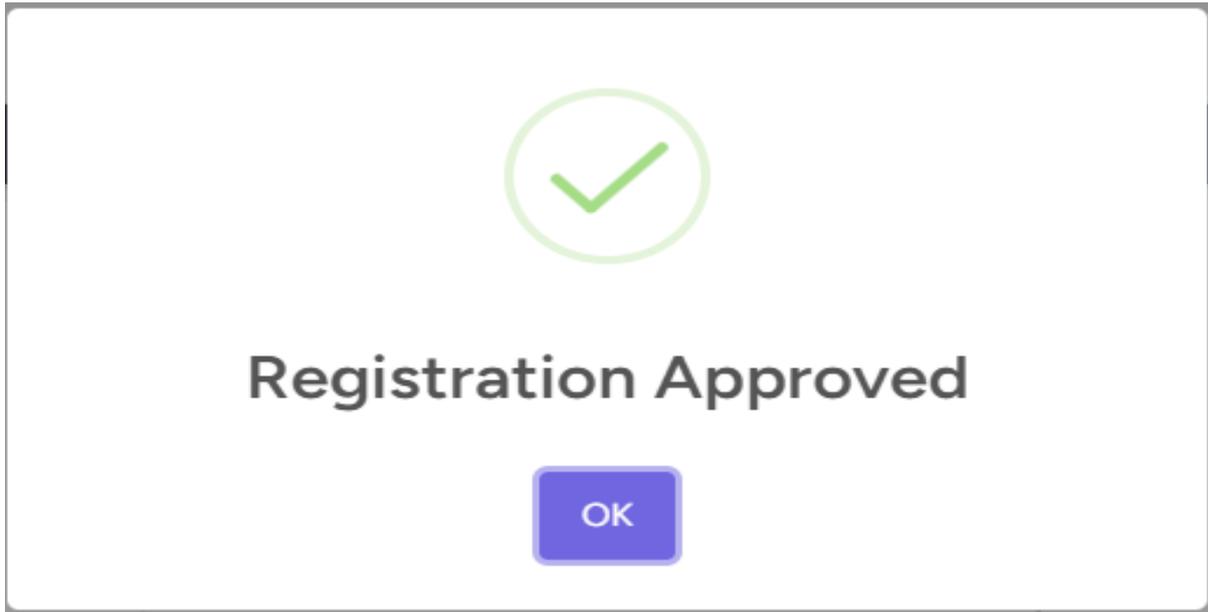
CLOSE **SAVE**



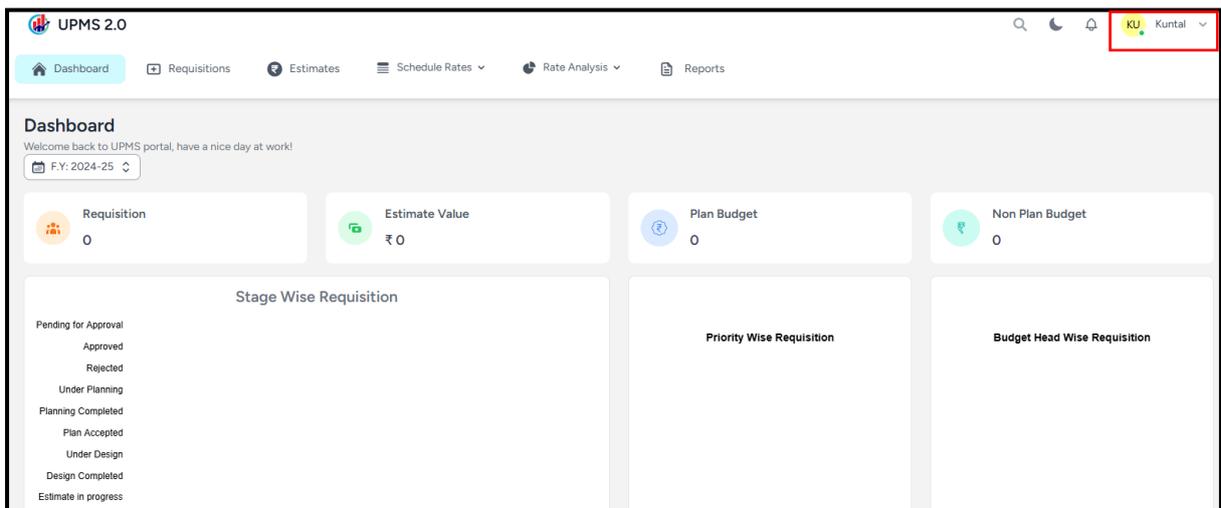
Are you sure?

A new user will be created from this registration request

Yes, confirm approve! **Cancel**



After that the **New User** can Login with his assigned Role.



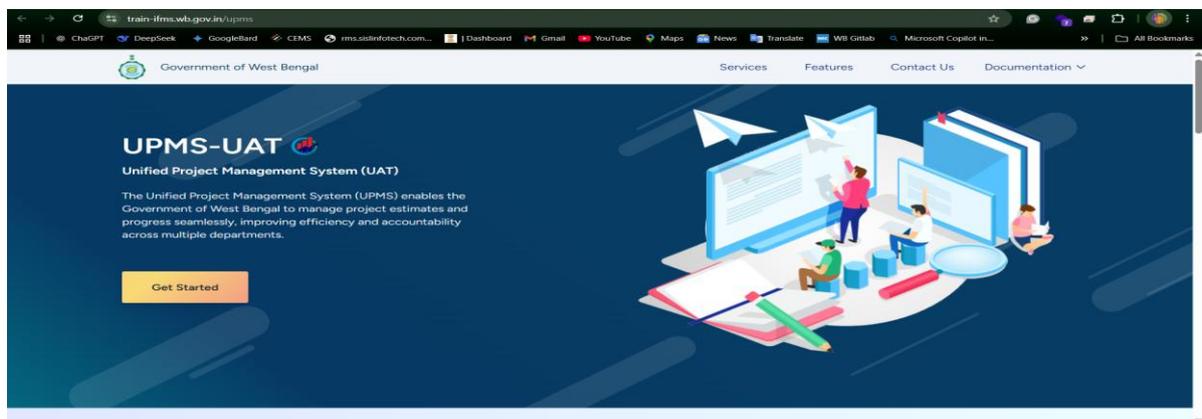
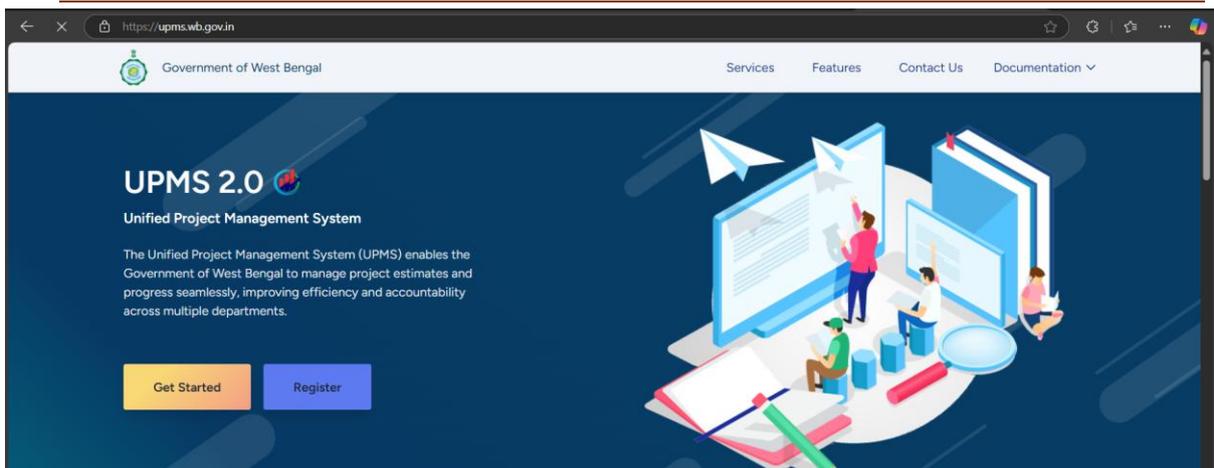
b) User Login

Open any Browser and click on search bar

Production Site -> <https://upms.wb.gov.in>

Demo/Training Site -> <https://train-ifms.wb.gov.in/upms>

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>Click On **Get Started** Then give the login credentials and sign in to your account.

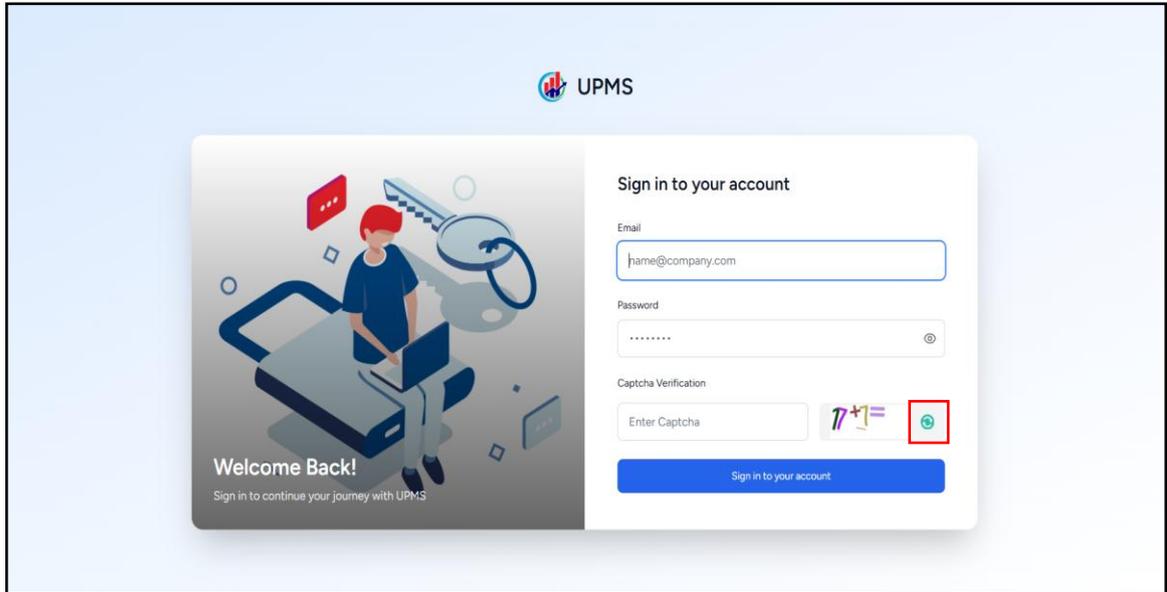
Login Form

A screenshot of the UPMS login form. The page has a light blue background with the UPMS logo at the top center. On the left, there is an illustration of a person sitting at a desk with a laptop, surrounded by floating icons like a key, a speech bubble, and a document. Below the illustration, it says 'Welcome Back!' and 'Sign in to continue your journey with UPMS'. On the right, there is a white box titled 'Sign in to your account'. It contains three input fields: 'Email' (with 'hame@company.com' entered), 'Password' (with dots for masking and a visibility icon), and 'Captcha Verification' (with 'Enter Captcha' and a captcha image). A blue button labeled 'Sign in to your account' is highlighted with a red border at the bottom of the form.

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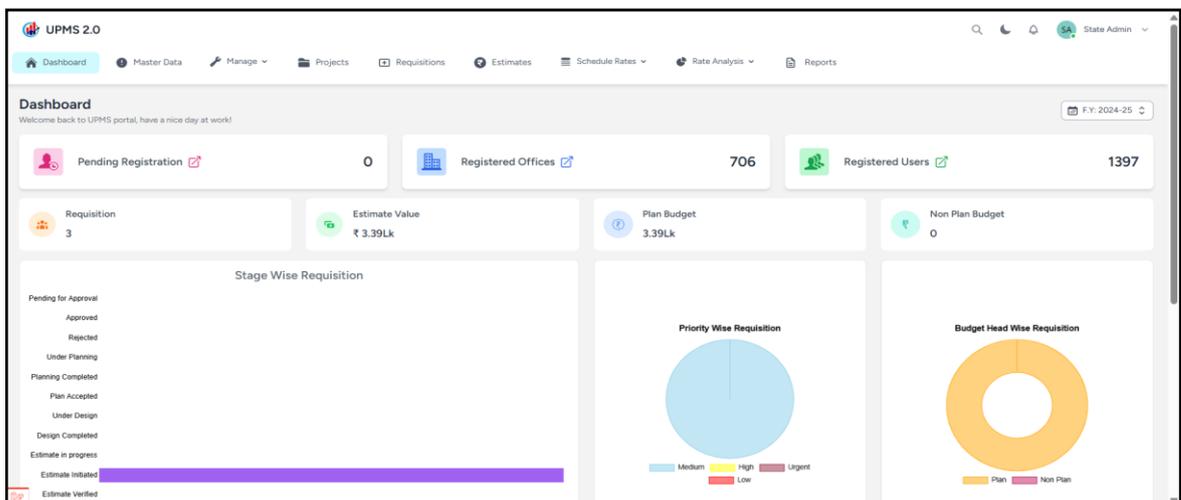
If Captcha is not understood, click the refresh button on the captcha box on the right side.

Refresh Captcha



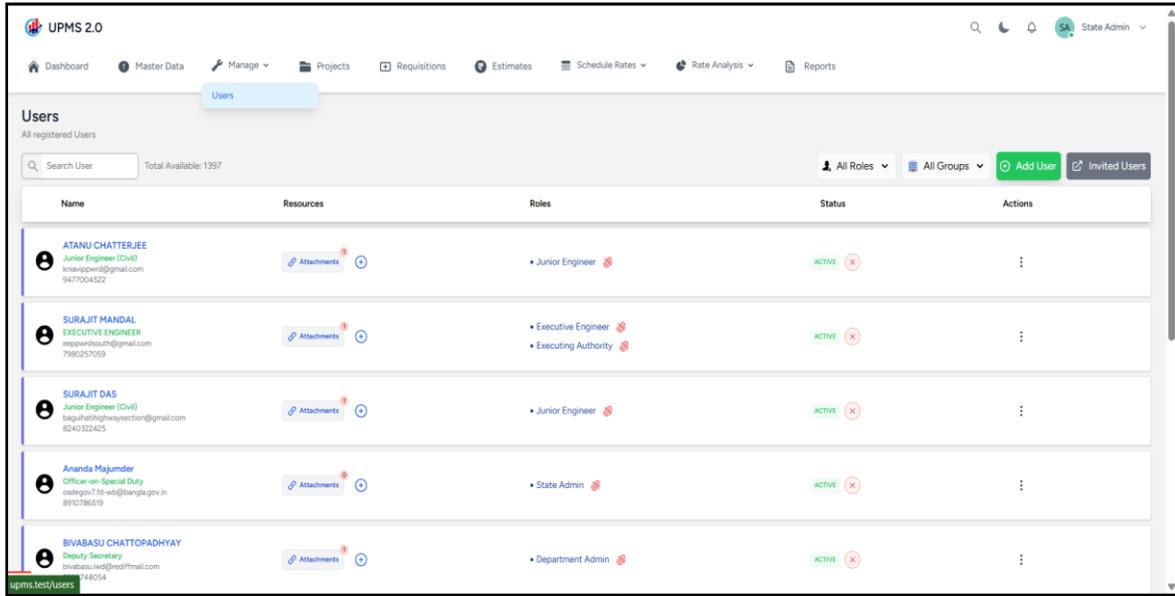
After successfully login dashboard page is open

Dashboard Page



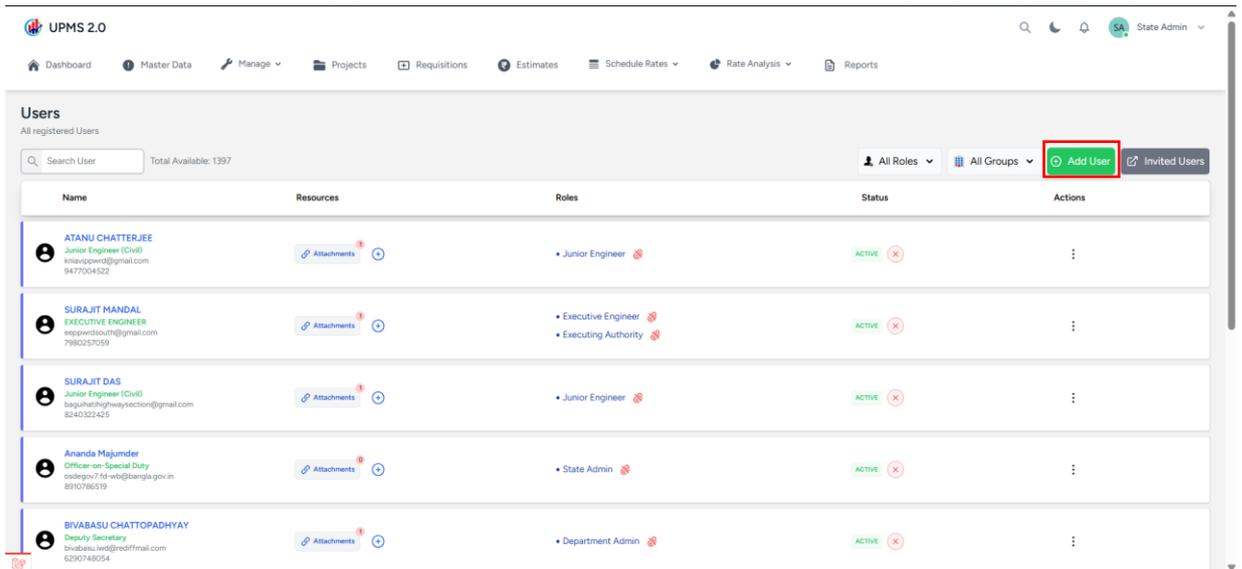
>Click on **User** under the Manage menu and saw the corresponding Department User wise User list.

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>If User doesn't exist then Click on Add User Button (Add User button is only visible for State or Department Admin)

c) Create User



>Fill the User details correctly and click on Plus icon if multiple user create in a same time then in that page again fill the another user details then click on Plus icon.

User Form

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NAME *
Test User

DESIGNATION * Junior Engineer EMAIL * testuser@gmail.com

MOBILE * 2154785465 ROLE * Department Admin

Select Resources

RESOURCE TYPE Department RESOURCE PUBLIC WORKS - WORKS

Resources Selected: 1 Clear
Department - PUBLIC WORKS

SAVE

>After User is add successfully then click on save button and user is created.

Here create user list is shown

Create User List

Name	Resources	Role	Link	Status	Actions
Animesh Karan EXECUTIVE ENGINEER animesh.kar@nc.in 8145884572	Department - IRRIGATION & WATERWAYS	Executive Engineer	Copy Link expires on: 05/04/2025	Pending	

d) Invite Users

>Here click on Copy Link

Name	Resources	Role	Link	Status	Actions
Animesh Karan EXECUTIVE ENGINEER animesh.kar@nc.in 8145884572	Department - IRRIGATION & WATERWAYS	Executive Engineer	Copy Link Copy Link expires on: 05/04/2025	Pending	

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- >Open a different or the same browser and open the InPrivate/Incognito tab.
- >Paste the copy link in a different browser or the InPrivate/Incognito tab.
- >Set the password and click on register (Please check the password policy then set the password)

Password set form

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User Information
Please confirm the following details:

Full Name	Animesh Karan
Designation	EXECUTIVE ENGINEER
Email Address	animesh.ee@nic.in
Mobile	8145884572
Role	Executive Engineer
Resources	Department IRRIGATION & WATERWAYS

PASSWORD *

CONFIRM PASSWORD *

Password Policy

Already registered? REGISTER

Password Policy
Minimum 8 Characters, with atleast one of each Uppercase, Lowercase, Number and Special Character

OK

- >Click on the Login button after set the password

User Log In Form

Looks like you've accepted the invitation

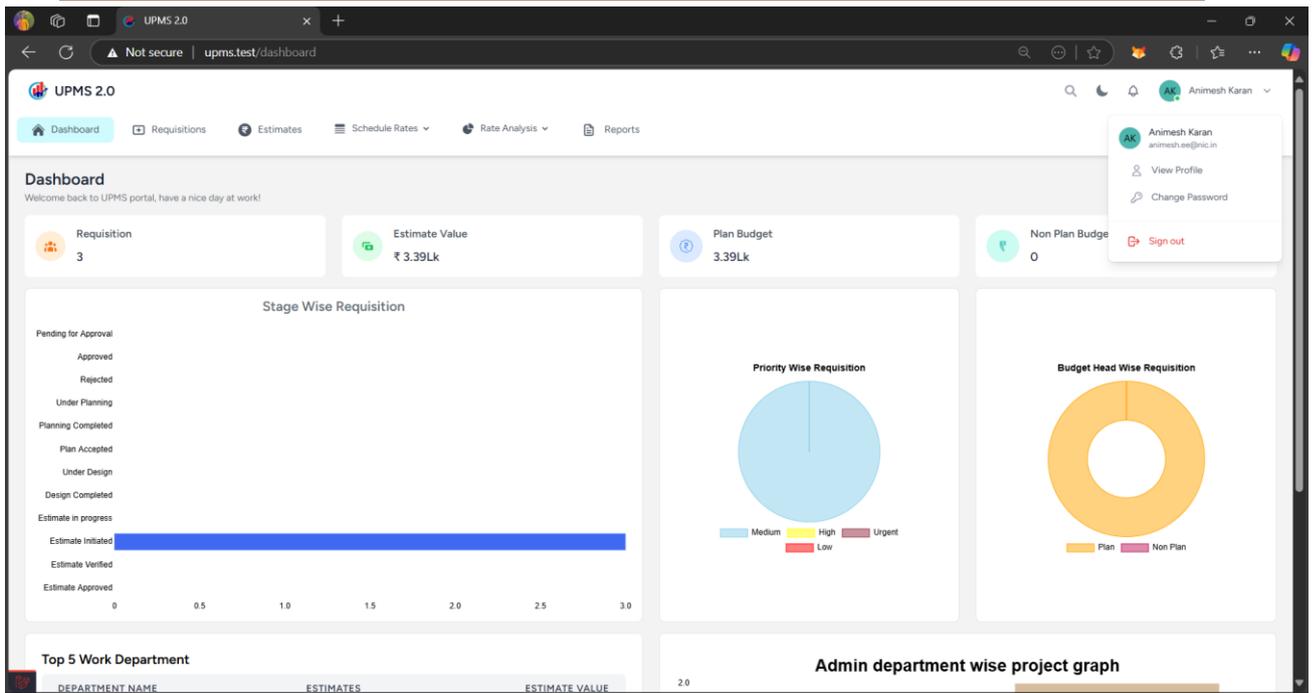
You can Login with your credentials now.

Log in

- >Give the user credentials

User is Login

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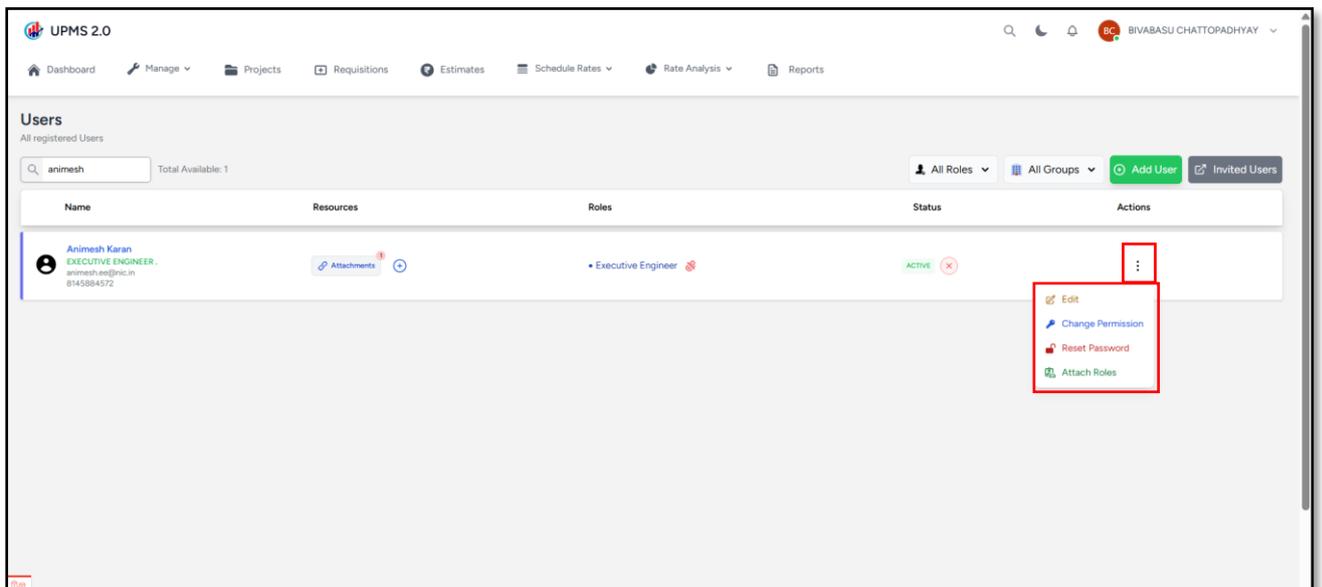


e) Manage User

>Check the new added user in user list .

- Here you can manage the user Active/De-active.
- In Action fields you can User Edit.
- Change user permission.
- Reset Password.
- Attach multiple role.

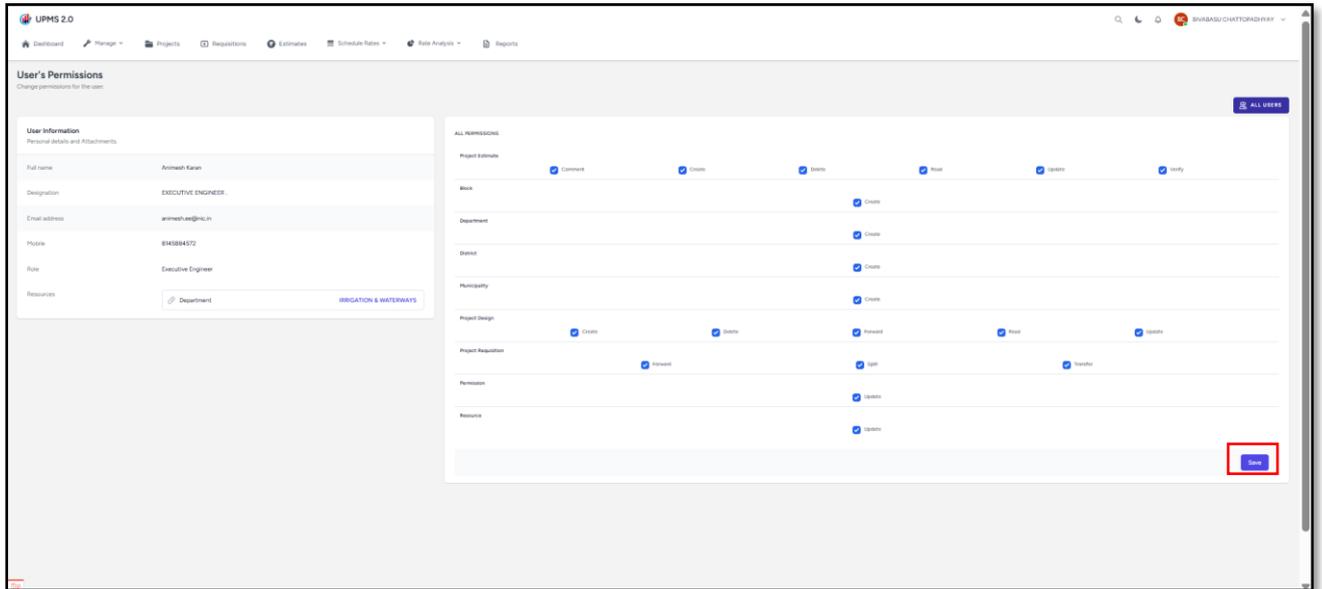
Manage User



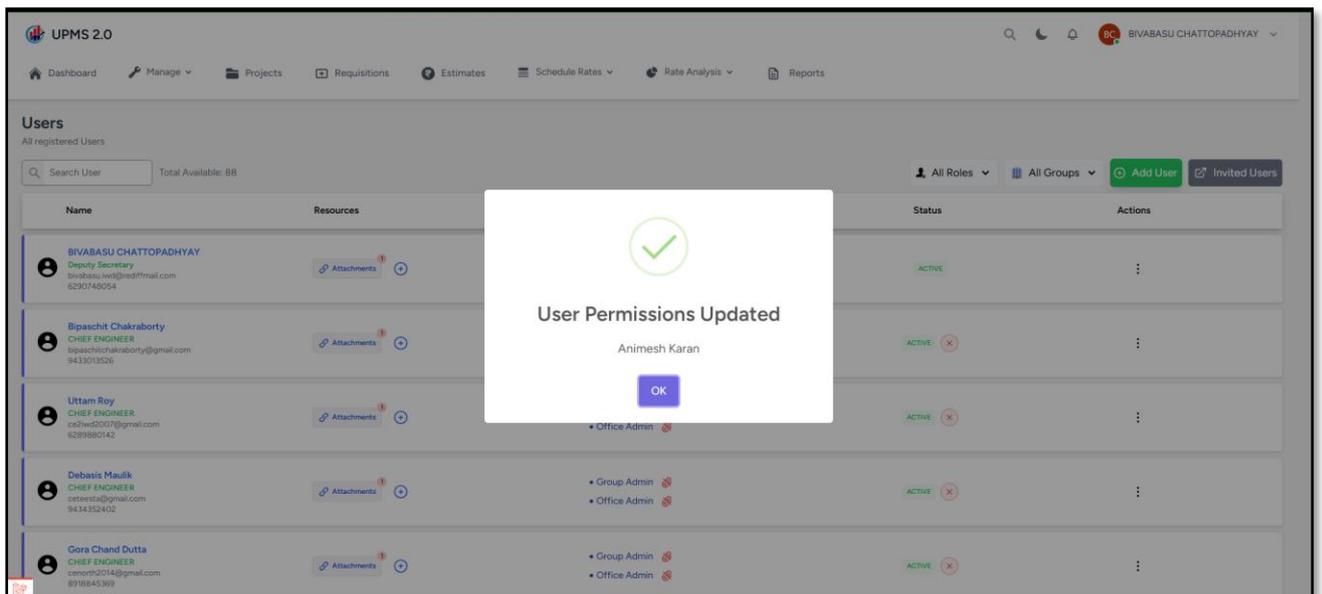
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>Click on Change user permission and update all permissions

>Then click on save button



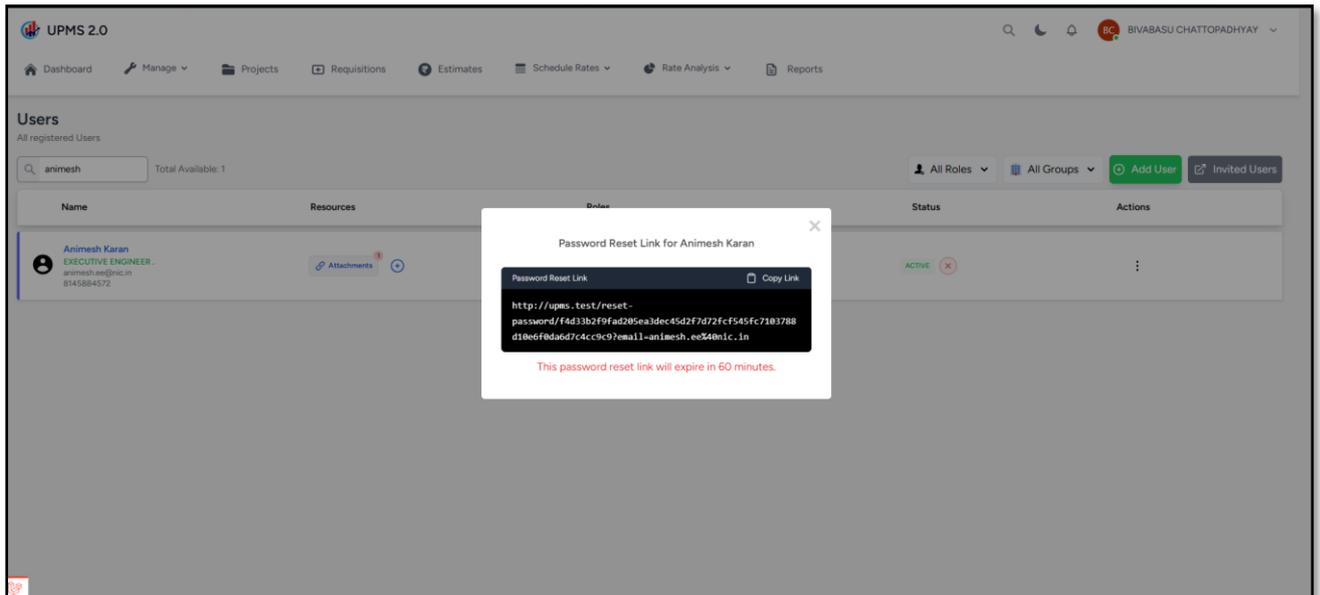
Then a pop message is shown user permissions updated.



f) Reset Password

>If reset password then click on reset password and click on confirm after confirmed a pop is open and copy the password reset link

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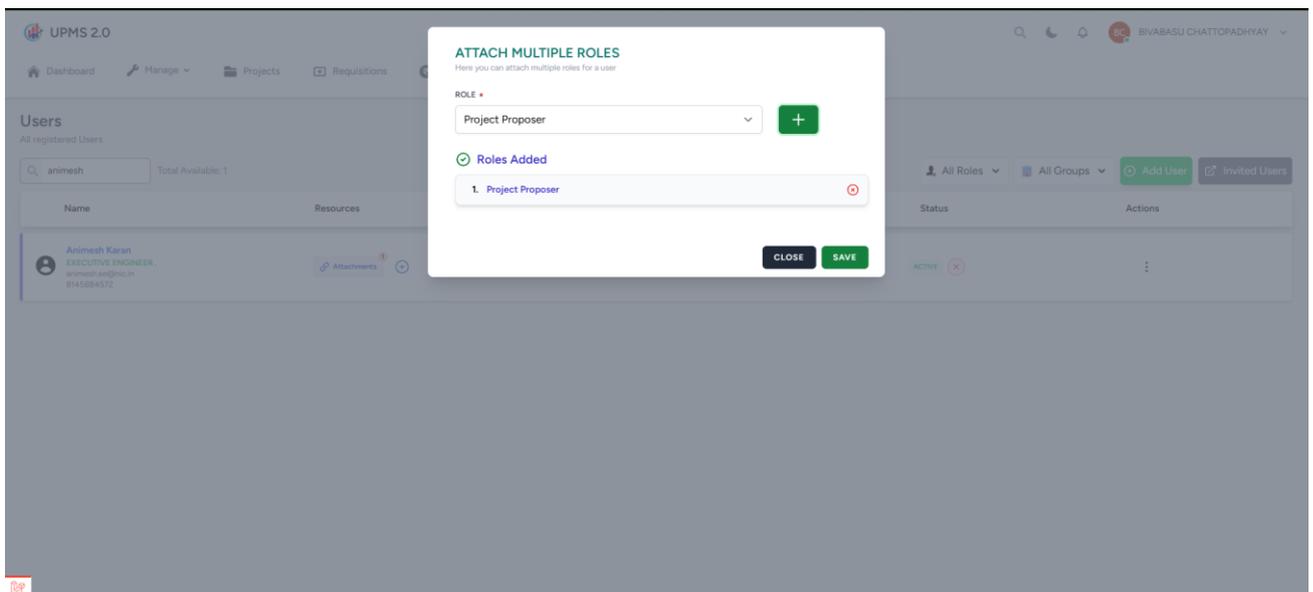


After copying do the same of Adding new user set password

>If the user exists multiple role then click on Attach multiple role in action field.

g) Attach Multiple Role

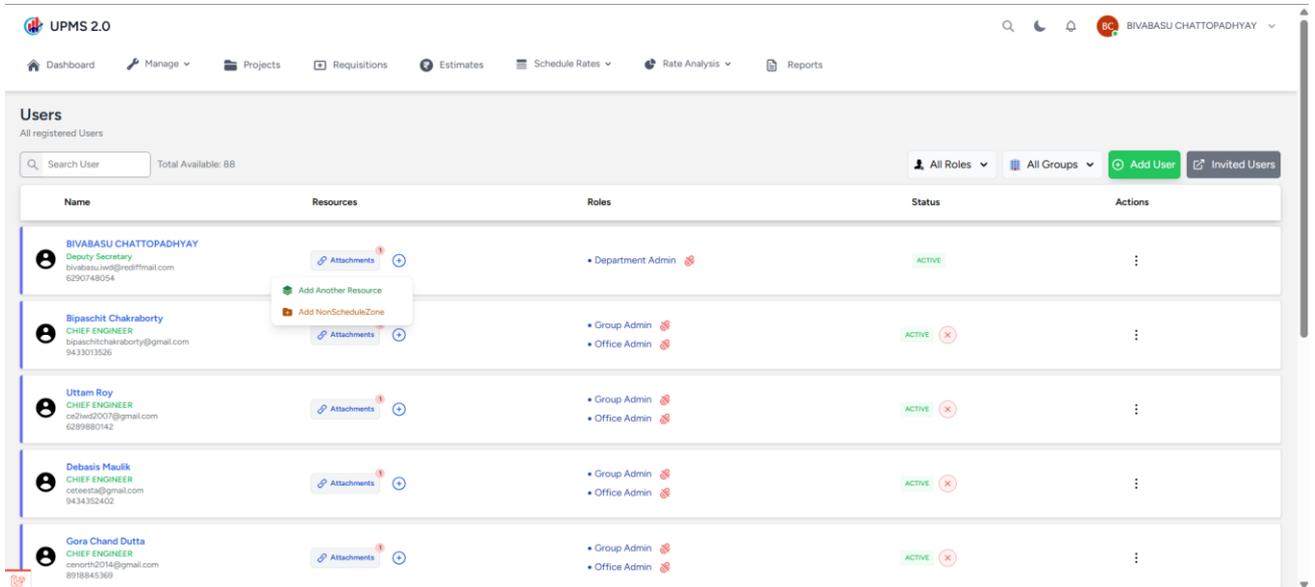
After clicking then select new role and click on save button



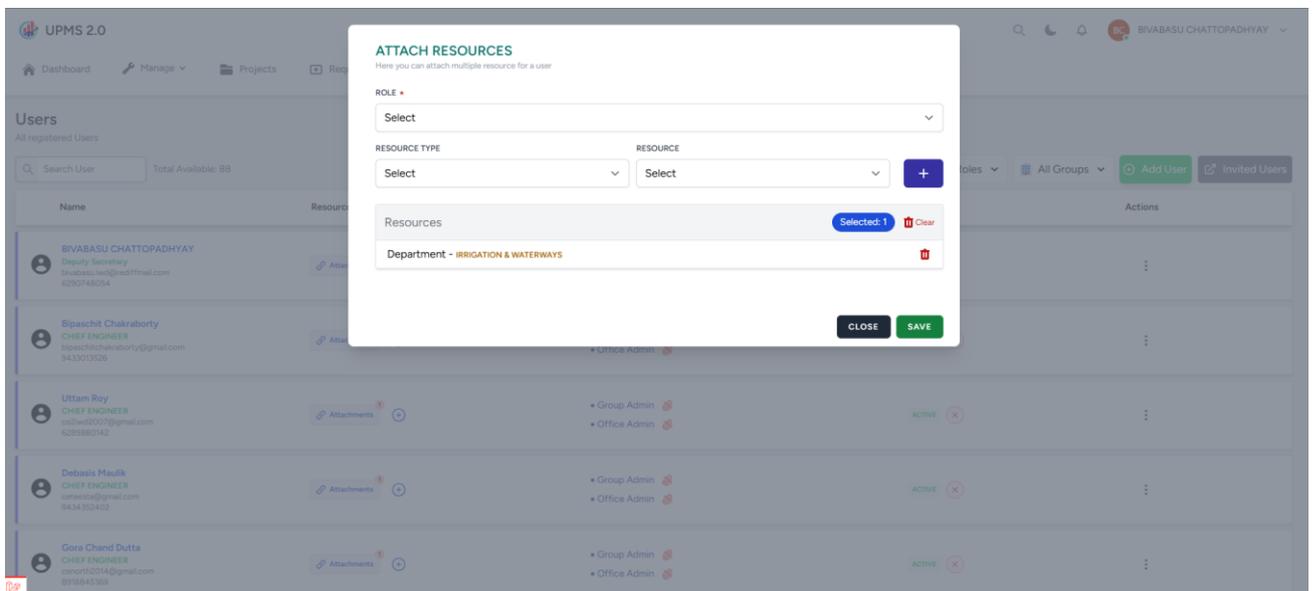
After save then a sweet alert is shown "Role Attached Successfully" and Multiple role is shown in user list role field

h) Attach another Resources

If the user is needed for Add another resources then click on **Plus Icon (+)** and click on add another Resource

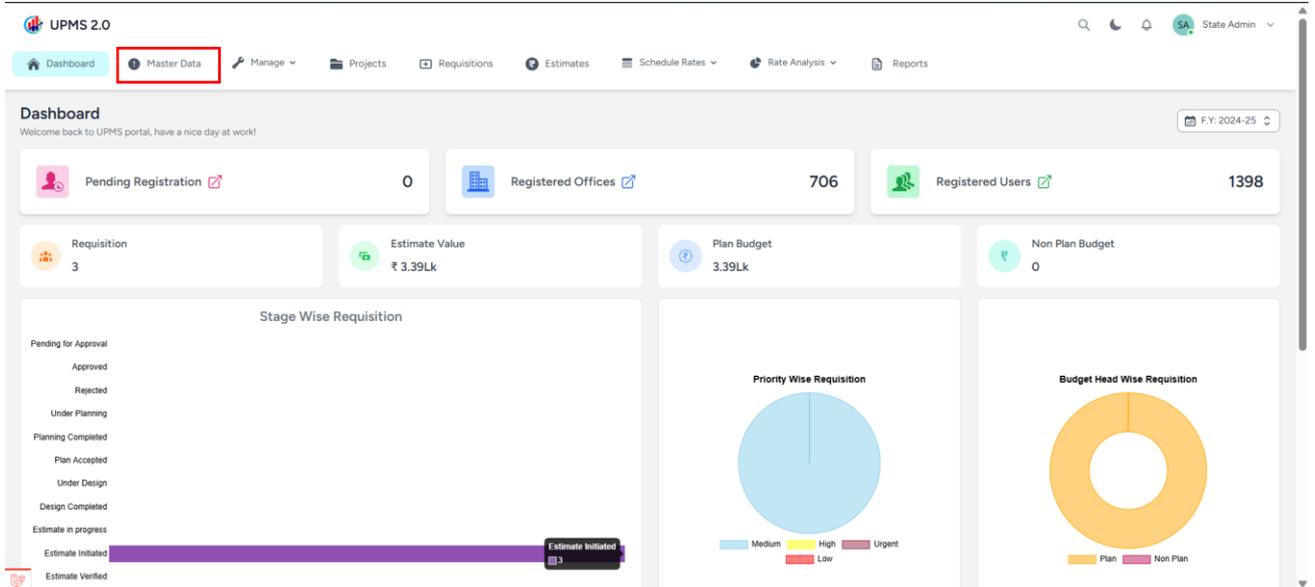


After clicking Add another Resource then a modal is open here you can attach multiple resource for a user.

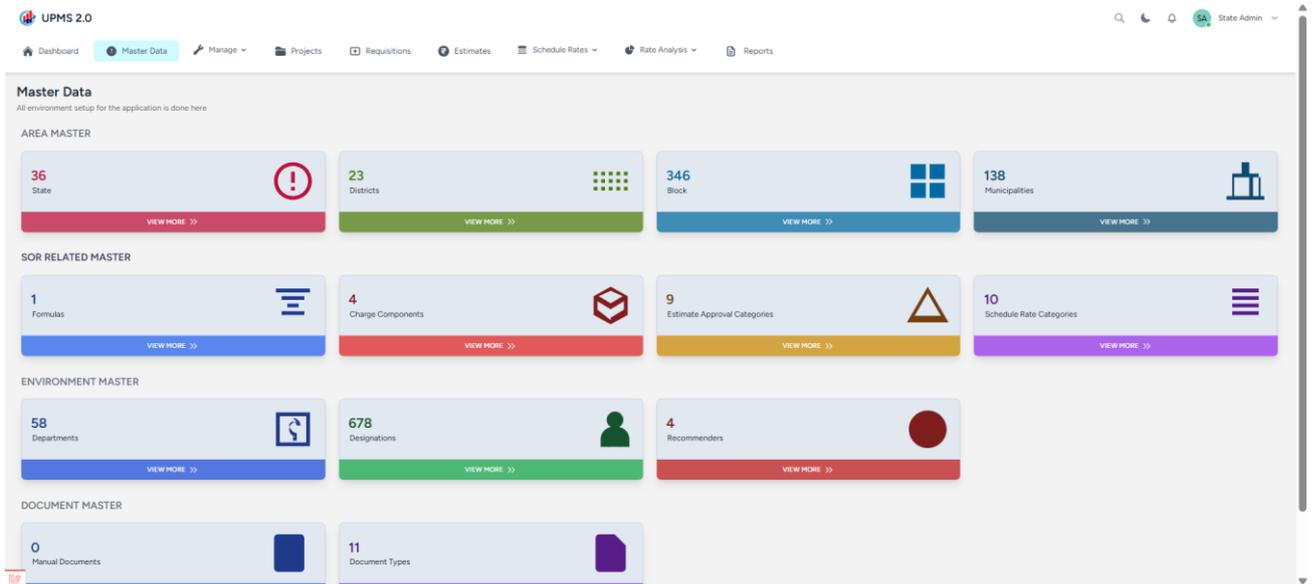


Master Data Management

Here Master Data Managed by State Admin & Department Admin
> Click on Master Data Menu



>Here all environment setup for the application is done here



Manage Master Data

- **Area Master** (State , District , Block , Municipalities)
- **SOR Related Master** (Formulas , Charge Components , Estimate Approval Categories , Schedule Rate Categories)
- **Environment Master** (Departments , Designations , Recommenders)

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- **Document Master** (Manual Documents , Document Types)

➤ Click on under the Area Master state view more and manage the states Master Data.

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Dashboard Master Data Manage Projects Requisitions Estimates Schedule Rates Rate Analysis Reports

Master Data : State

Here you can manage the states Master Data.

Search State Total Available: 36 Add New

Name	LG Code	Ref Code	State UT	Local Name	Action
1. ANDAMAN AND NICOBAR ISLANDS	35	35	UT		⋮ Edit Delete
2. ANDHRA PRADESH	28	28	State		⋮
3. ARUNACHAL PRADESH	12	12	State		⋮
4. ASSAM	18	18	State		⋮
5. BIHAR	10	10	State		⋮
6. CHANDIGARH	4	4	UT		⋮
7. CHHATTISGARH	22	22	State		⋮

➤ Here State master data can add edit and delete

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Dashboard Master Data Manage Projects Requisitions Estimates Schedule Rates Rate Analysis Reports

Master Data : District

Here you can manage the districts Master Data.

Search District Total Available: 23 Add New

Name	LG Code	Ref Code	State Name	Action
1. 24 PARAGANAS NORTH	303	09	WEST BENGAL	⋮
2. 24 PARAGANAS SOUTH	304	10	WEST BENGAL	⋮ Edit Delete
3. ALIPURDUJAR	664	21	WEST BENGAL	⋮
4. BANKURA	305	17	WEST BENGAL	⋮
5. BIRBHUM	307	19	WEST BENGAL	⋮
6. COOCHBEHAR	308	01	WEST BENGAL	⋮
7. DARJEELING	309	03	WEST BENGAL	⋮

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➤ Here you can manage the district master data under the West Bengal State

Master Data : Block
Here you can manage the blocks Master Data.

Search Block Total Available: 346 Add New

Name	LG Code	Ref Code	District Name	Local Name	Action
1. ALIPURDUAR-I	2919	210101	ALIPURDUAR		⋮
2. ALIPURDUAR-II	2920	210102	ALIPURDUAR		⋮
3. AMDANGA	2723	090101	24 PARAGANAS NORTH		⋮
4. AMTA-I	2905	120201	HOWRAH		⋮
5. AMTA-II	2906	120202	HOWRAH		⋮
6. ARAMBAGH	2887	130401	HOOGLHY		⋮
7. ARSHA	3044	160101	PURULIA		⋮

➤ Here you can manage all the Block Master data Add/Edit/Delete Block.

Master Data : Municipality
Here you can manage the municipality Master Data.

Search Municipalities Total Available: 138 Add New

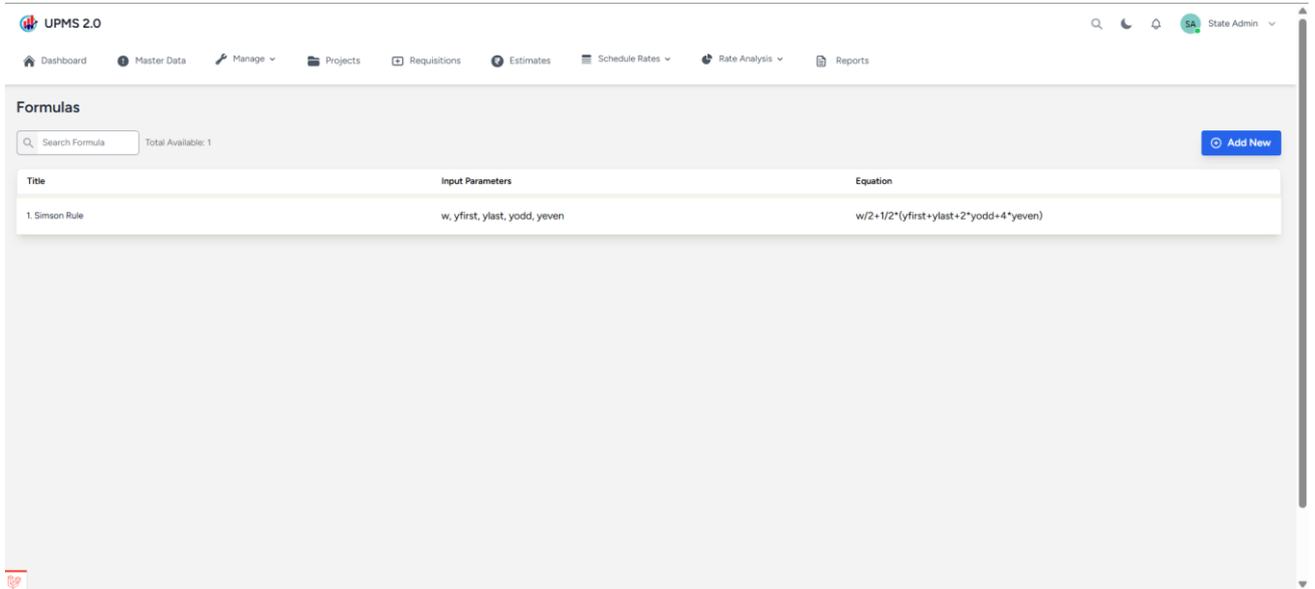
Name	LG Code	Ref Code	District Name	Local Name	Action
1. ALIPURDUAR	249958	210107	ALIPURDUAR		⋮
2. ARAMBAGH	250168	130407	HOOGLHY		⋮
3. ASANSOL	250032	200105	PASCHIM BARDHAMAN		⋮
4. ASHOKNAGAR KALYANGARH	250128		24 PARAGANAS NORTH		⋮
5. BADURIA	250134	090411	24 PARAGANAS NORTH		⋮
6. BAHARAMPUR	249999	070206	MURSHIDABAD		⋮
7. BAIDYABATI	250175	130308	HOOGLHY		⋮

➤ Here you can manage all the municipality Master Data Add/Edit/Delete Municipalities.

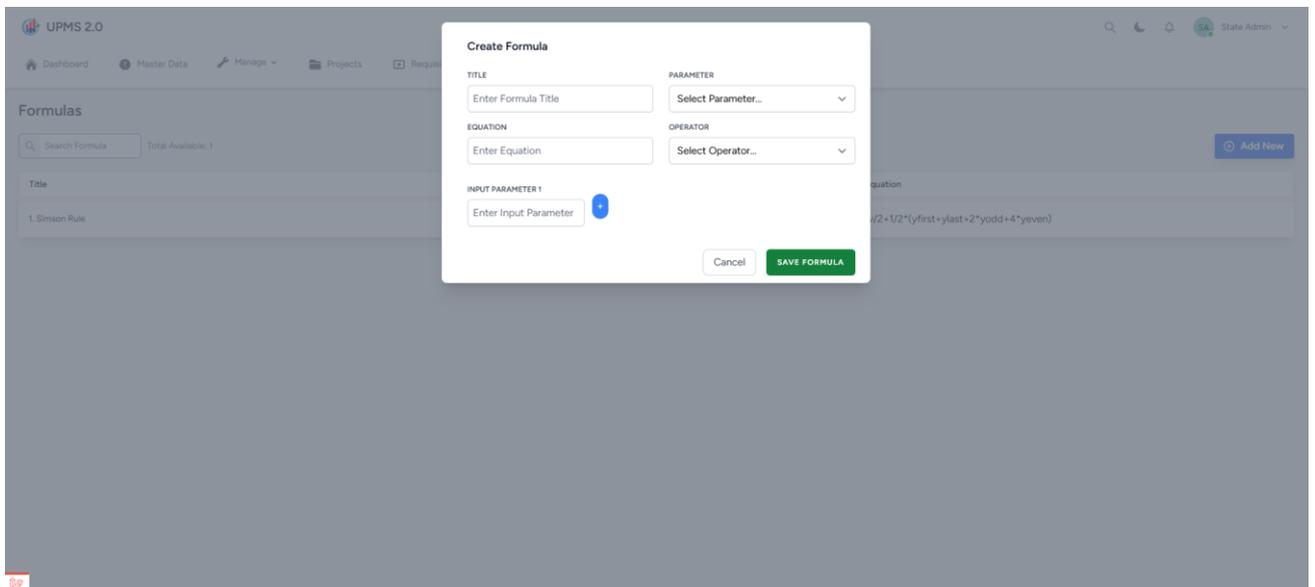
SOR Related Master

(Formulas, Charge Components, Estimate Approval Categories, Schedule Rate Categories)

➤ **Click on Formulas and here you can make or add your own formulas.**



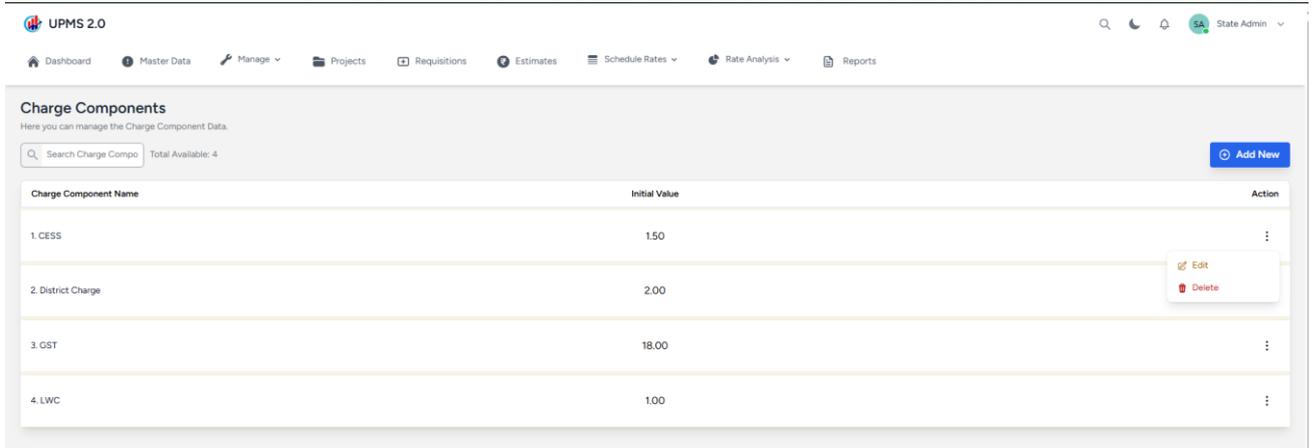
➤ **Click on Add new and Add Formula**



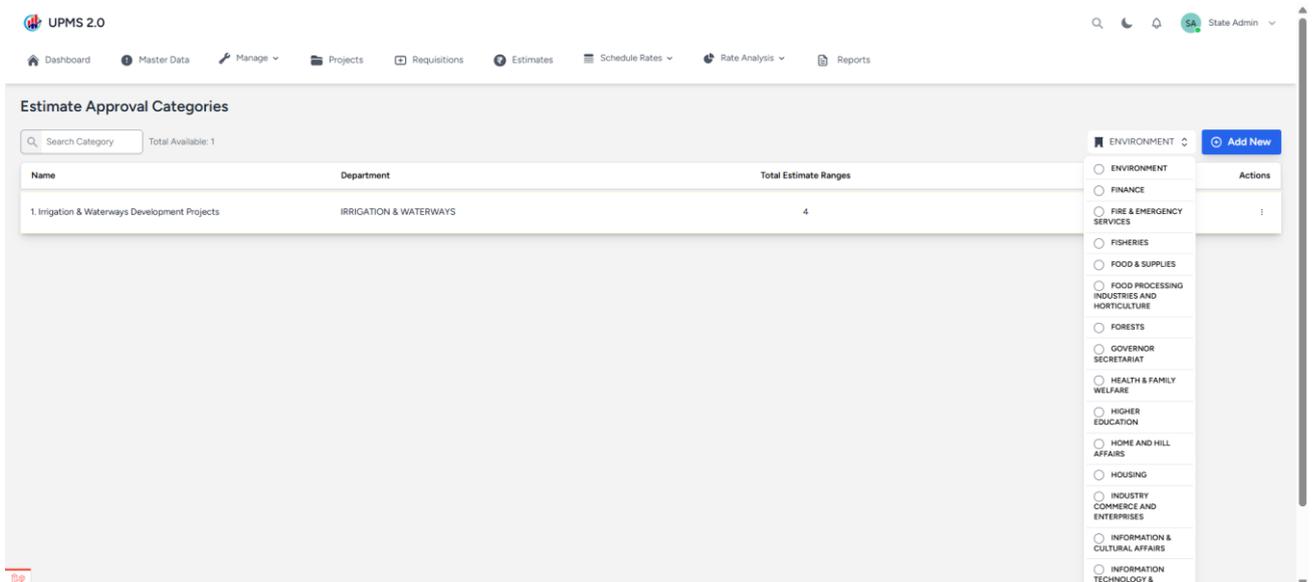
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Charge Components

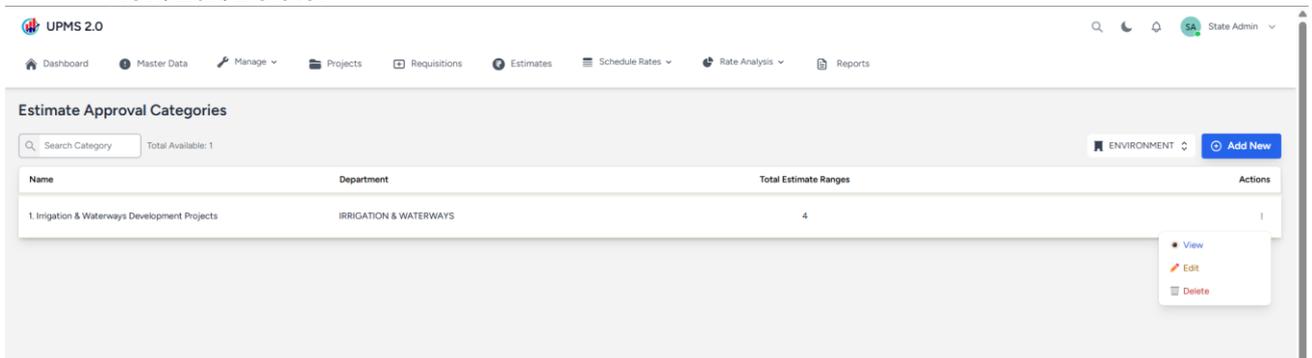
Here you can manage the Charge Component Data Add/Edit/Delete.



Estimate Approval Categories

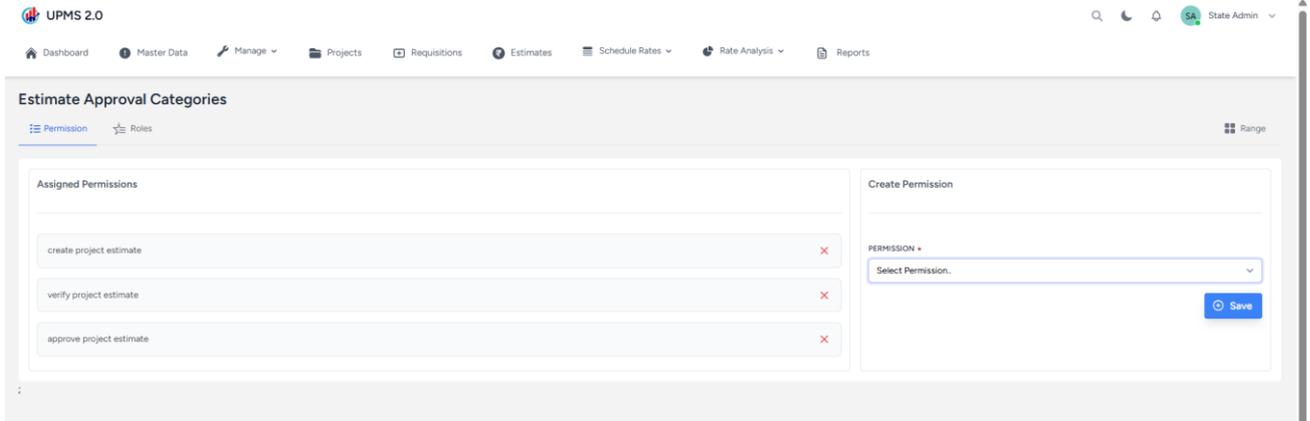


- Click on Estimate Approval Category and Filter the Environment.
- After select Environment then click on Action button and Here you can View/Edit/Delete.

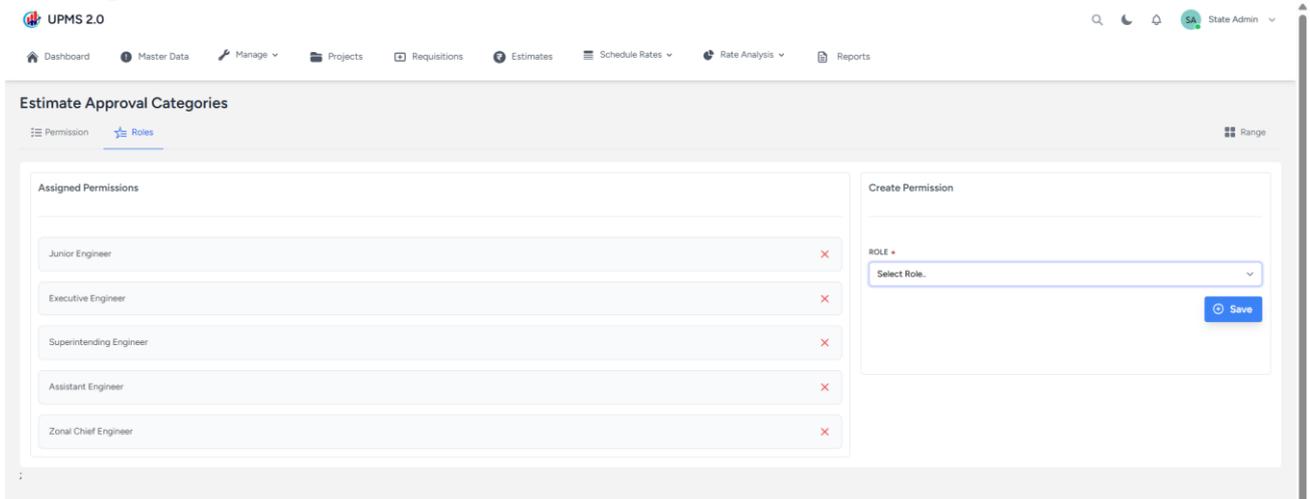


After click on View button then You Can Manage Permission Of estimate Approval Category.

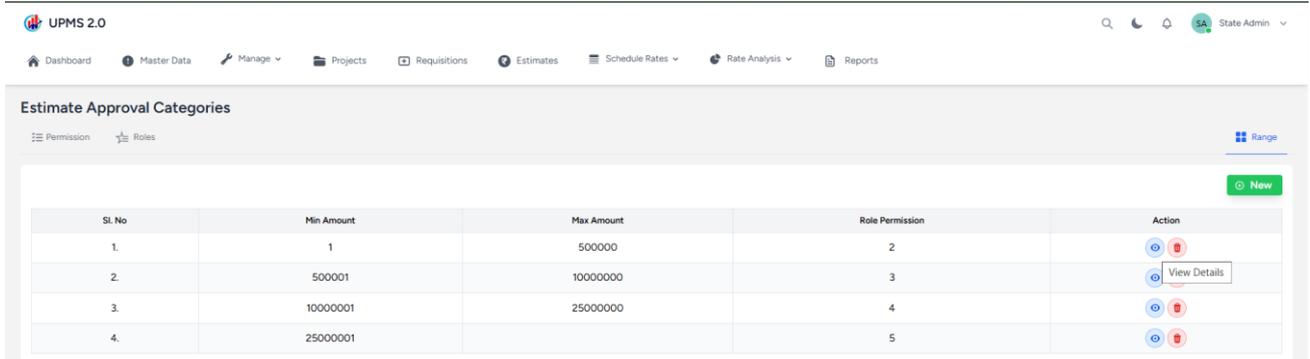
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Manage Roles.



Manage Range



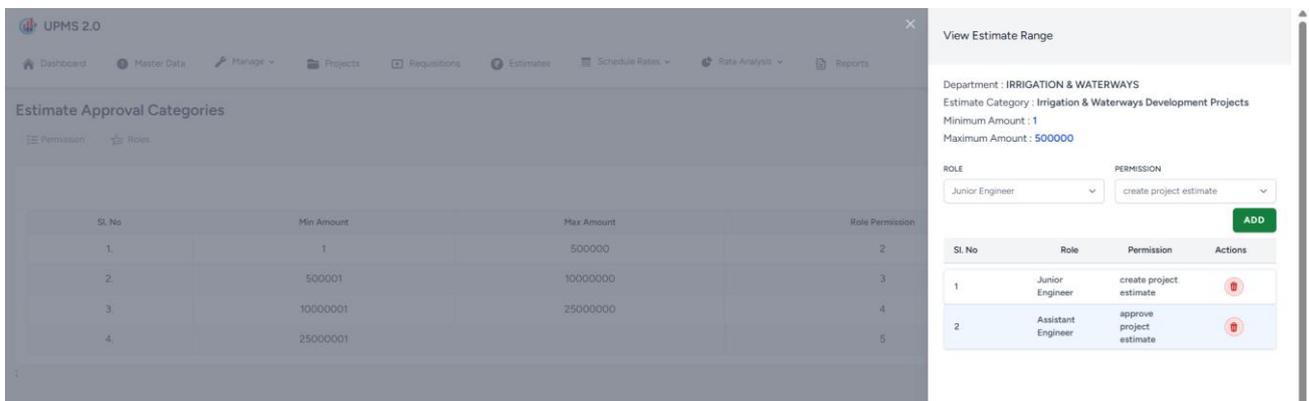
➤ Here under the Range Action menu you can add / view range and delete range.

Click on Add New Button and Create Estimate Range

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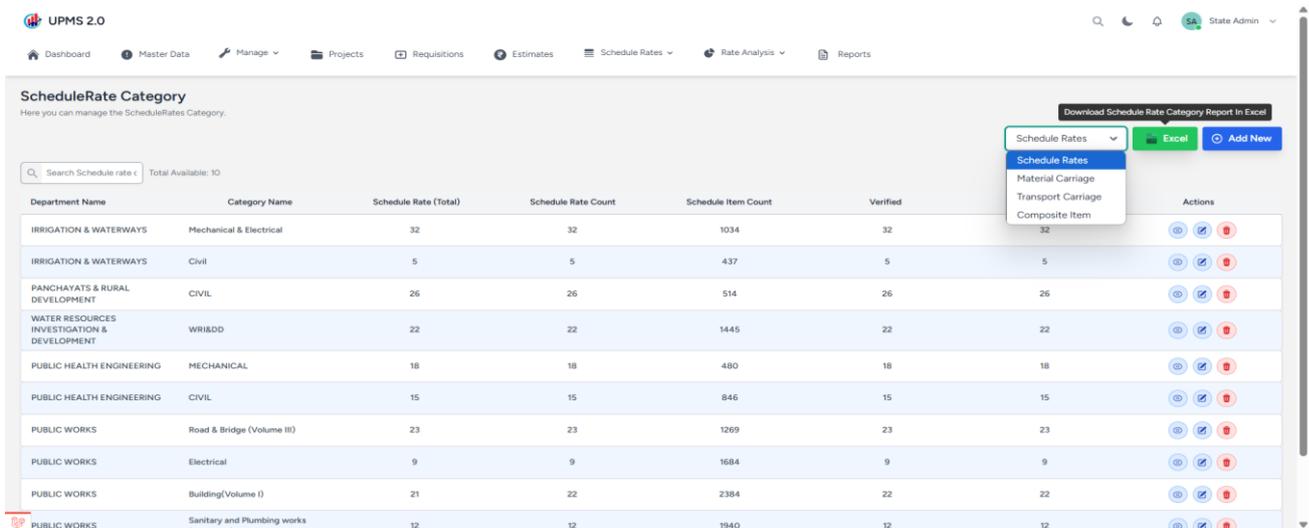


In action button when click on View button the you can view/add/delete the estimate range with role and permission



Schedule Rate Category

Here You can manage department category-wise Total schedule rate against check Schedule Item and Schedule Rate approved Verified and also download Excel List Of Schedule Rate Category.



Click on view button under the action menu for check more details of schedule rate.

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Schedule Rate Category Details
Here you can manage the Schedule Rates Category Details.

Department: IRRIGATION & WATERWAYS
Category Name: Mechanical & Electrical
Schedule Rate Total: 32

SL NO	SCHEDULE RATE TITLE	SCHEDULE ITEMS COUNT	STATUS
1	Chapter : 5.3 J	13	Approved on: March 19, 2025 Approved by:
2	Chapter : 5.3 K	9	Approved on: March 19, 2025 Approved by:
3	Chapter : 5.3 L	9	Approved on: March 19, 2025 Approved by:
4	Chapter : 5.3 M	15	Approved on: March 19, 2025 Approved by:
5	Chapter : 5.4	7	Approved on: March 19, 2025 Approved by:
6	Chapter : 5.1 A	20	Approved on: March 19, 2025 Approved by:
7	Chapter : 5.1 B	14	Approved on: March 19, 2025 Approved by:

➤ Click on Download button and the details download in pdf format

Schedule Rate Category Report

Department: IRRIGATION & WATERWAYS
Category: Mechanical & Electrical
Total Schedule: 32

SI No	Schedule Rate Title	Number of Items	Approved At
1	Chapter : 5.3 J	13	Approved
2	Chapter : 5.3 K	9	Approved
3	Chapter : 5.3 L	9	Approved
4	Chapter : 5.3 M	15	Approved
5	Chapter : 5.4	7	Approved
6	Chapter : 5.1 A	20	Approved
7	Chapter : 5.1 B	14	Approved
8	Chapter : 5.1 C	12	Approved
9	Chapter : 5.1 D	9	Approved
10	Chapter : 5.1 E	16	Approved
11	Chapter : 5.1 F	138	Approved
12	Chapter : 5.1 G	35	Approved
13	Chapter : 5.1 H	32	Approved
14	Chapter : 5.1 I	6	Approved

Environment Master (Departments, Designations, Recommenders)

Here In the Department Section Add/Edit/Delete and view all the departments and also manage the departments is belongs under the works department or Non-Works Department.

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Master Data : Department
Here you can manage the department Master Data.

Search department Total Available: 58 Add New

Name	Ref Code	Demand Code	State Name	Non-works / Works	Actions
AGRICULTURAL MARKETING	AM	4	WEST BENGAL	<input type="checkbox"/>	Edit Delete
AGRICULTURE	AG	5	WEST BENGAL	<input type="checkbox"/>	Edit Delete
ANIMAL RESOURCES DEVELOPMENT	AD	6	WEST BENGAL	<input type="checkbox"/>	Edit Delete
BACKWARD CLASSES WELFARE	SC	7	WEST BENGAL	<input type="checkbox"/>	Edit Delete
CHIEF MINISTER OFFICE	CH	61	WEST BENGAL	<input type="checkbox"/>	Edit Delete
CONSUMER AFFAIRS	CA	10	WEST BENGAL	<input type="checkbox"/>	Edit Delete
COOPERATION	CO	8	WEST BENGAL	<input type="checkbox"/>	Edit Delete
CORRECTIONAL ADMINISTRATION	JL	33	WEST BENGAL	<input type="checkbox"/>	Edit Delete
COUNCIL OF MINISTERS [HOME (C & E)]	CL	3	WEST BENGAL	<input type="checkbox"/>	Edit Delete
DISASTER MANAGEMENT AND CIVIL DEFENCE	DM	73	WEST BENGAL	<input type="checkbox"/>	Edit Delete

Designation

You can manage (Add/Edit/Delete) the Designation for Master Data.

UPMS 2.0 State Admin

Dashboard Master Data Manage Projects Requisitions Estimates Schedule Rates Rate Analysis Reports

Master Data : Designation
Here you can manage the Designation for Master Data.

Search Designation Na Total Available: 678 Add New

Name	Ref Code	Actions
TA TO SE, P & M CIRCLE, PWD	391	Edit Delete
3RD GRADE CLERK	392	Edit Delete
3RD. GRADE CLERK	393	Edit Delete
A. E., HOWRAH MECHANICAL SUBDIVISION	394	Edit Delete
A. E., R. W. S. PURULIA SUB-DIVISION	395	Edit Delete
A.E.,R,W,S NADIA SUB-DIVISION,PHE DTE	396	Edit Delete
A.O. & EX-OFFICIO A.S.	397	Edit Delete
Accountant	127	Edit Delete
Accountant cum Cashier	375	Edit Delete
Accounts Clerk	263	Edit Delete

Position 1 to 10 of 678 records

Recommenders

You can manage (Add/Edit/Delete) the Recommenders for Master Data.

UPMS 2.0 State Admin

Dashboard Master Data Manage Projects Requisitions Estimates Schedule Rates Rate Analysis Reports

Recommenders
Here you can manage the Recommenders

Search Recommender Total Available: 4 Add New

Recommender Name	Actions
1. District Magistrate	Edit Delete
2. Head Of Department	Edit Delete
3. MLA	Edit Delete
4. MP	Edit Delete

UPMS Version 2.0

Document Master (Manual Documents, Document Types) Manuals

You can manage (Add/Edit/Delete) the Manual Documents for Master Data.

The screenshot shows the 'Manuals' page in the UPMS 2.0 interface. The page title is 'Manuals' and the subtitle is 'Here you can add and view Manual.' There is a search bar labeled 'Search Manual' and a 'Total Available: 1' indicator. A blue 'Add New' button is located in the top right corner. The main content is a table with the following data:

Name Of Manual	No. Of Manual	Actions
1. Test	0	⋮

Document Types

Here you can manage the Document Types Data (Add/Edit/Delete).

The screenshot shows the 'Document Types' page in the UPMS 2.0 interface. The page title is 'Document Types' and the subtitle is 'Here you can manage the Document Types Data.' There is a search bar labeled 'Search Document Type' and a 'Total Available: 11' indicator. A blue 'Add New' button is located in the top right corner. The main content is a table with the following data:

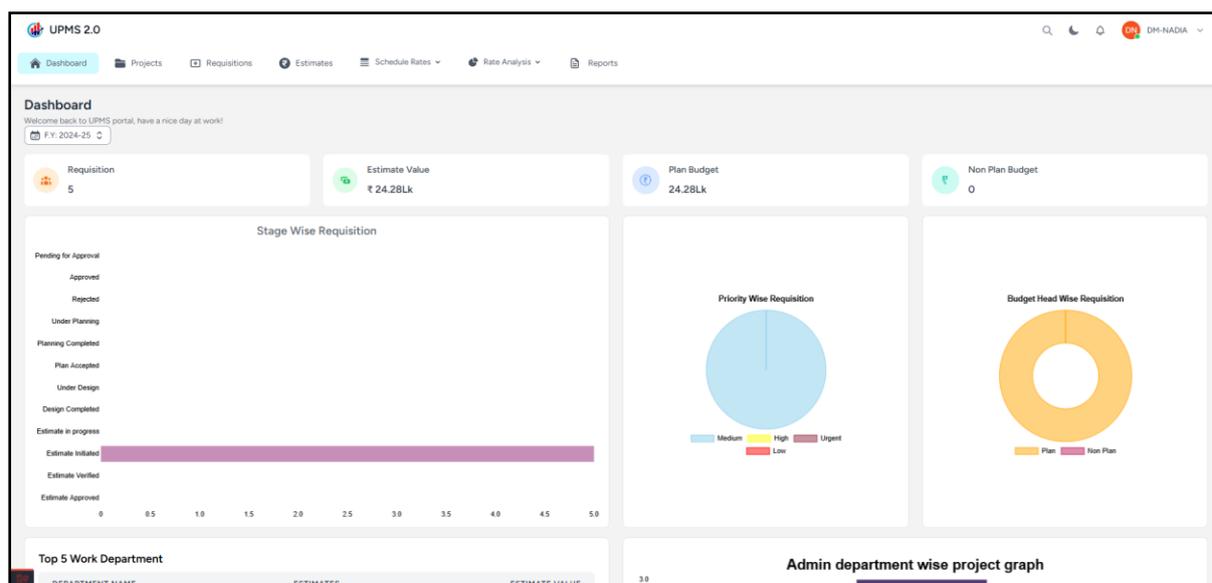
Name Of Document Type	Actions
1. ADCP survey report	⋮
2. Basic survey report	⋮
3. Design document	⋮
4. Design philosophy	⋮
5. Details of cross drainage structure	⋮
6. GAD	⋮
7. Land clearance	⋮
8. Meeting with citizen report	⋮

Project, Requisition and Estimate Creation

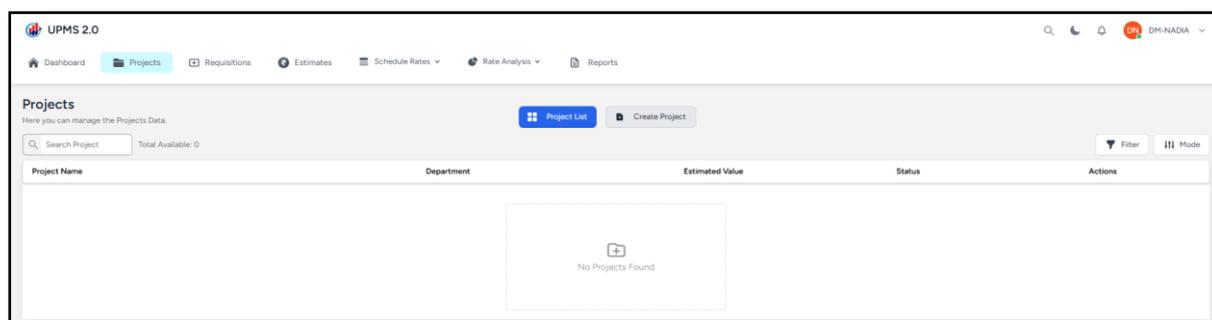
In **UPMS** the one of the main motives is to create a project cost. For that there are various steps we have to follow to create a cost of a project.

At very first we have to create a project. For that, a user has to log in with a **Project Proposer** role because only **Project Proposer** role has that permission can create a project.

- 1) Go to login page – upms.wb.gov.in/login
- 2) Give correct credentials to login as a **Project Proposer**.
- 3) User can redirect to his dashboard home page.



Now, for create a new project, user have to click on the **project** menu at top navigation bar. It will redirect to the projects page. Here, at a glance user can see his/her created projects as a project list.



a) Create Project

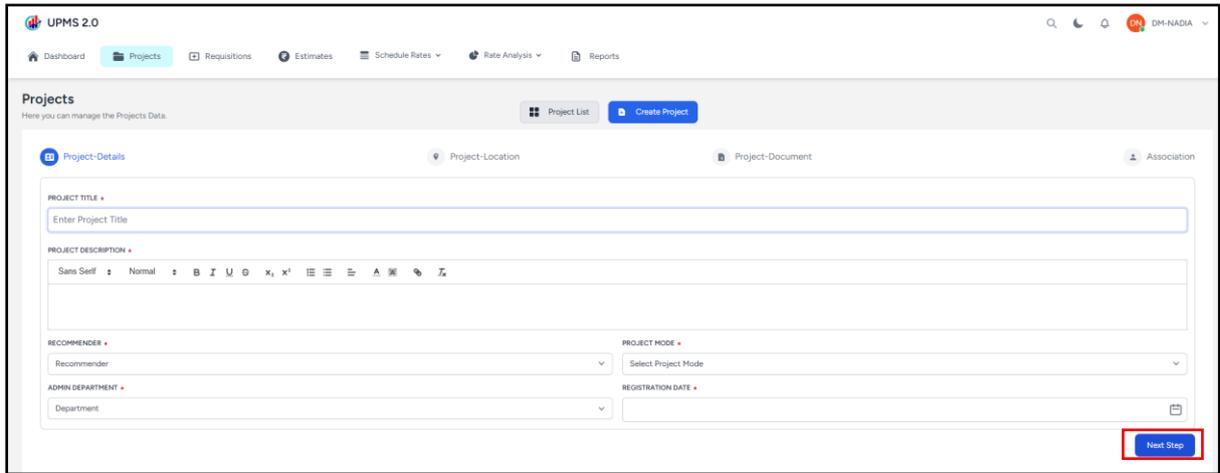
In this page, there is a button **Create Project**. To create a new project, click on that button. It will redirect to a project creation form at the same page.

Here, "Create Project" form is split into 4 steps. Those are –

- 1) Project Details
- 2) Project Location

UPMS Version 2.0

- 3) Project Document
- 4) Association



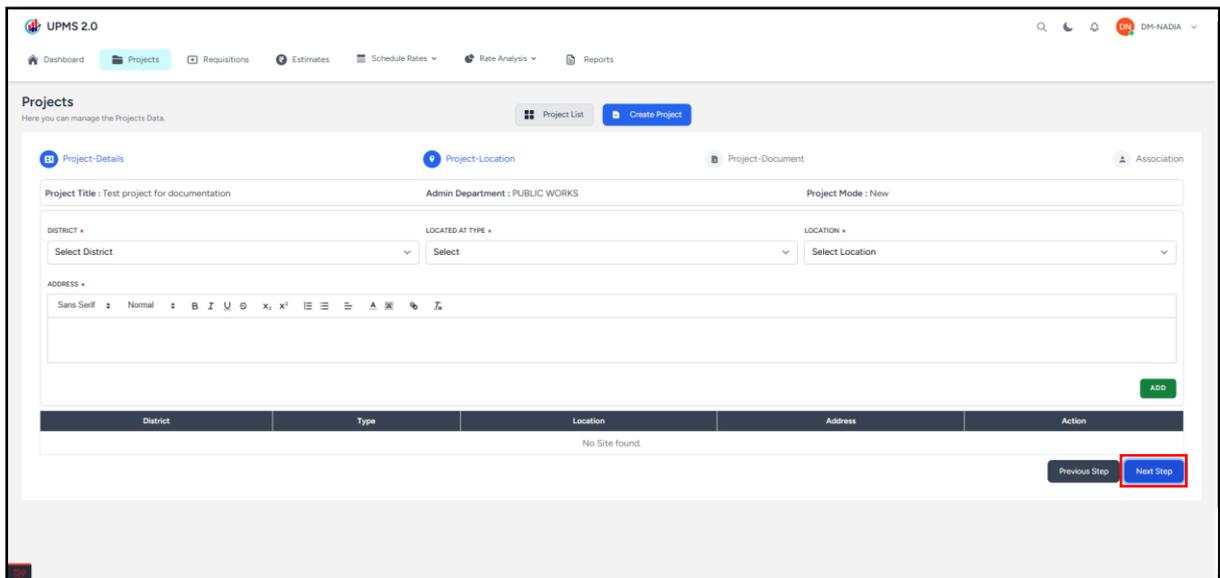
The screenshot shows the 'Project Details' form in the UPMS 2.0 interface. The form is titled 'Project-Details' and is part of a multi-step process. The current step is 'Project-Details', with other steps being 'Project-Location', 'Project-Document', and 'Association'. The form contains the following fields:

- PROJECT TITLE ***: A text input field with the placeholder 'Enter Project Title'.
- PROJECT DESCRIPTION ***: A rich text editor with a toolbar and a text area.
- RECOMMENDER ***: A dropdown menu with 'Recommender' selected.
- PROJECT MODE ***: A dropdown menu with 'Select Project Mode' selected.
- ADMIN DEPARTMENT ***: A dropdown menu with 'Department' selected.
- REGISTRATION DATE ***: A date input field.

A 'Next Step' button is located at the bottom right of the form, highlighted with a red box.

First, need to put Project Details data like Project title, description, recommender, project mode, admin department and registration date.

b) Add site & Upload Document



The screenshot shows the 'Project Location' form in the UPMS 2.0 interface. The form is titled 'Project-Location' and is part of a multi-step process. The current step is 'Project-Location', with other steps being 'Project-Details', 'Project-Document', and 'Association'. The form contains the following fields:

- Project Title**: 'Test project for documentation'
- Admin Department**: 'PUBLIC WORKS'
- Project Mode**: 'New'
- DISTRICT ***: A dropdown menu with 'Select District' selected.
- LOCATED AT TYPE ***: A dropdown menu with 'Select' selected.
- LOCATION ***: A dropdown menu with 'Select Location' selected.
- ADDRESS ***: A rich text editor with a toolbar and a text area.

A table is displayed below the form, showing the results of the location selection:

District	Type	Location	Address	Action
No Site found.				

A 'Next Step' button is located at the bottom right of the form, highlighted with a red box.

This is the second step to create a project. Here, basically have to put Project Location details. The project can be for a single location or multiple locations, that's why in project location section there has a provision for select multiple location under block or municipality. So, select district, located at type (block / municipality), location (depends on district) & address and click on the **Add** button. Then it will be added and then click on the **Next** button for third step.

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UPMS 2.0

Dashboard | Projects | Requisitions | Estimates | Schedule Rates | Rate Analysis | Reports

Projects

Project List | Create Project

Project-Details | Project-Location | Project-Document | Association

Project Title : Test project | Admin Department : PUBLIC WORKS | Project Mode : New

TITLE : Enter Document Title | DOCUMENT TYPE : Select Document Type... | PREPARED DATE : mm/dd/yyyy | UPLOAD DOCUMENT : Choose File | No file chosen

ADD

Title	Document Type	Prepared Date	Action
No Document attached.			

Previous Step | Skip

This is Project Document section. Here put a title of document, select document type, prepared date of project document and upload a document (preferred PDF) related to project (if available). Then click on the **Add** button and click on **Next** button.

UPMS

Dashboard | Settings | Config | Projects | Schedule Rates | Rate Analysis | Reports

Projects

Project List | Create Project

Project-Details | Project-Location | Project-Document | Association

Project Title : Test Project | Admin Department : PUBLIC WORKS | Project Mode : New

WORK DEPARTMENT : Department | OFFICE : Office | USER : User | PRIORITY : Low

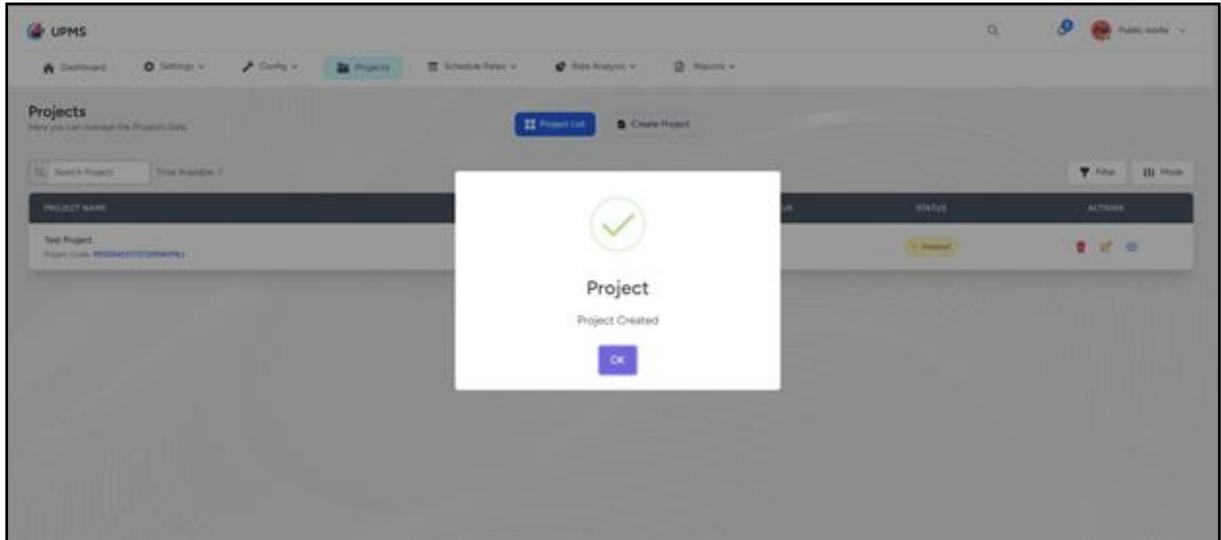
ADD

Associate With	Work Department	Priority	Action
Office: Office-0	Department: PUBLIC WORKS	High	

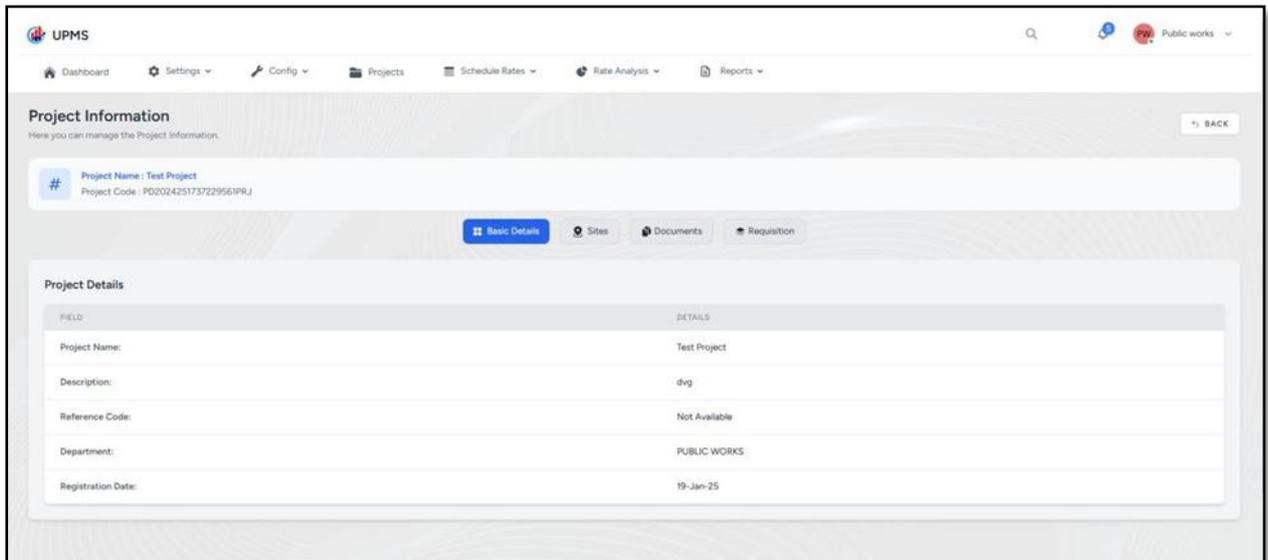
Previous Step | Finalize

This is the final step for create a project. Here select a **User** under an office under a **Work Department** whom you want to associate with this project for further process. Finally click on the **Finalize** button.

UPMS Version 2.0



Finally, a success message will be visible that **Project Created Successfully** and the created project will be visible on the project list.



This is **Project Basic details View** page. User can see this page by clicking on the view button under Action of a project from the project list.

Here a button is visible like **Requisition**, click on that button to see requisition

Details under the project.

c) Project Requisition

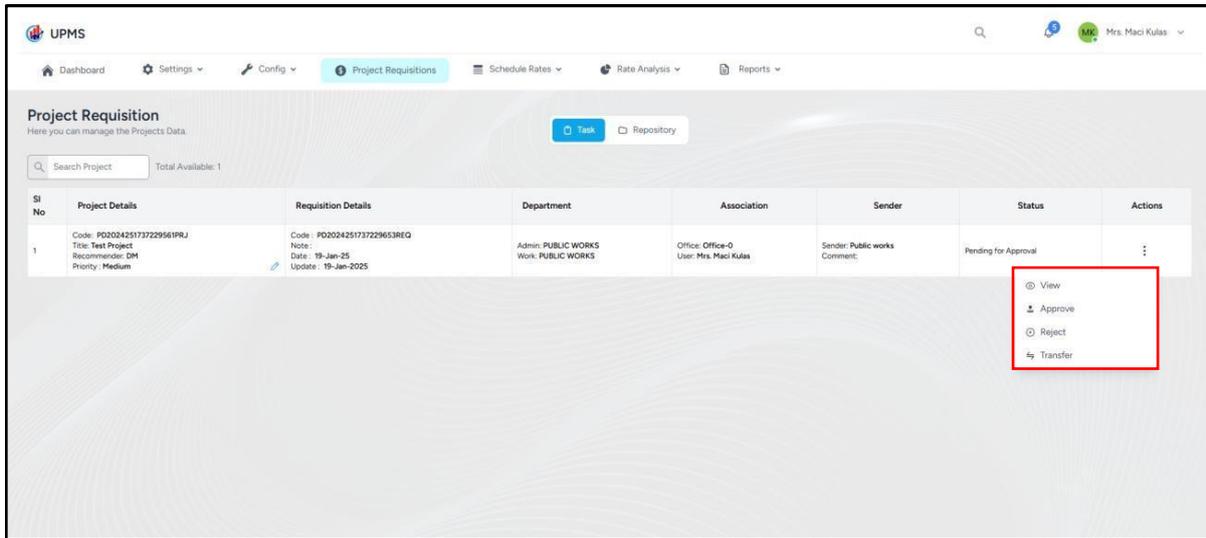
Now, Start by logging into the platform using your credentials as an **Executing Authority** (who got the requisition) and who has the permission to approve the **Project Requisition**.

Access the Dashboard: Once logged in, the system will redirect you to the dashboard, which will be displayed on your screen.

Click on the **Project Requisition** menu from the top navigation bar. It will redirect to the project requisitions list page.

UPMS Version 2.0

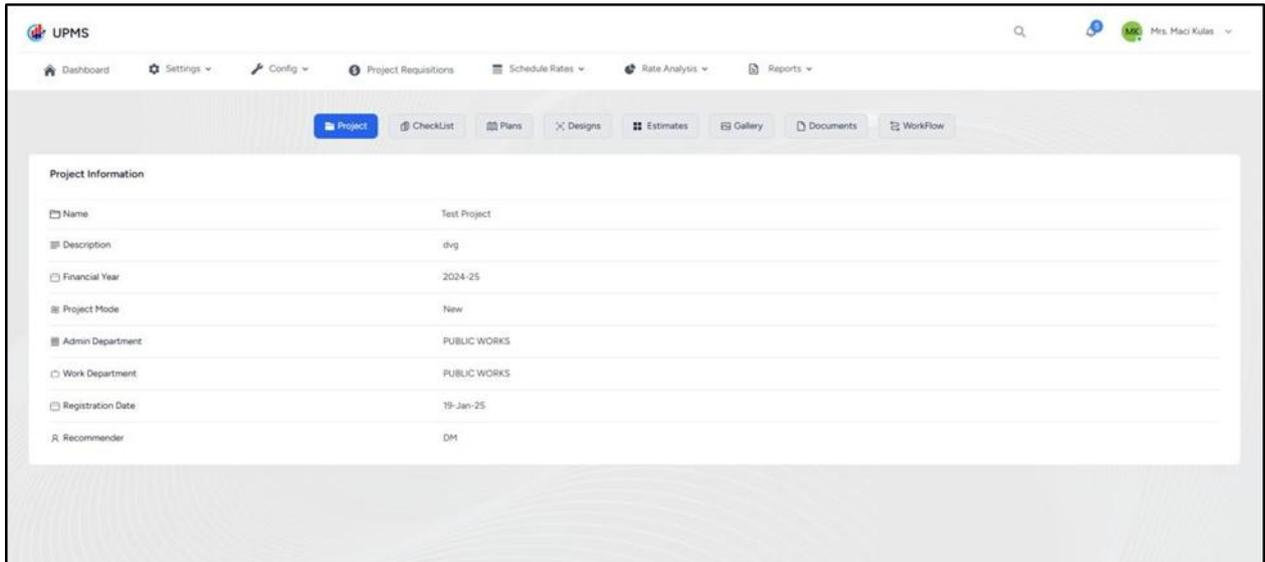
After redirecting to the project requisition list page, you can see that the project requisition details with project details are available there under **Task** tab. Approve the Requisition by clicking **Approve** button under Action button.



The screenshot shows the 'Project Requisition' page in the UPMS system. The 'Task' tab is selected. A table lists the requisition details. The 'Actions' column for the first row contains a dropdown menu with the following options: View, Approve, Reject, and Transfer. The 'View' option is highlighted with a red box.

Sl No	Project Details	Requisition Details	Department	Association	Sender	Status	Actions
1	Code: PD0204251737229561PRJ Title: Test Project Recommender: DM Priority: Medium	Code: PD0204251737229653REQ Note: Date: 19-Jan-25 Update: 19-Jan-2025	Admin: PUBLIC WORKS Work: PUBLIC WORKS	Office: Office-0 User: Mrs. Maci Kulas	Sender: Public works Comment:	Pending for Approval	<ul style="list-style-type: none">ViewApproveRejectTransfer

User can see the **Project Requisition Details** by clicking on the **View** from the Action button also.

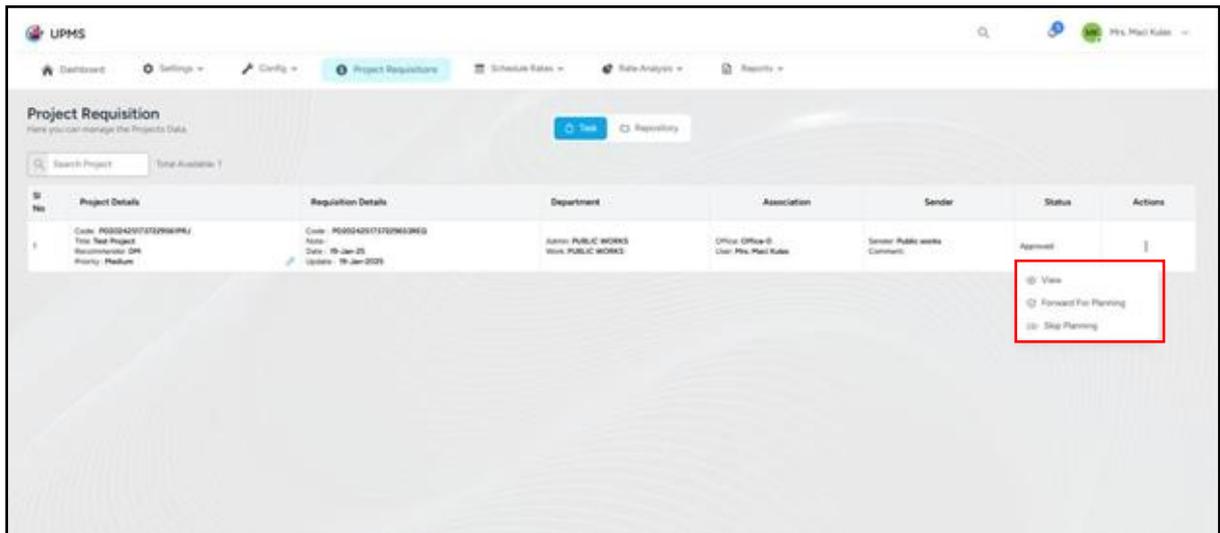


The screenshot shows the 'Project Requisition Details' page in the UPMS system. The 'Project' tab is selected. The page displays a form with the following fields and values:

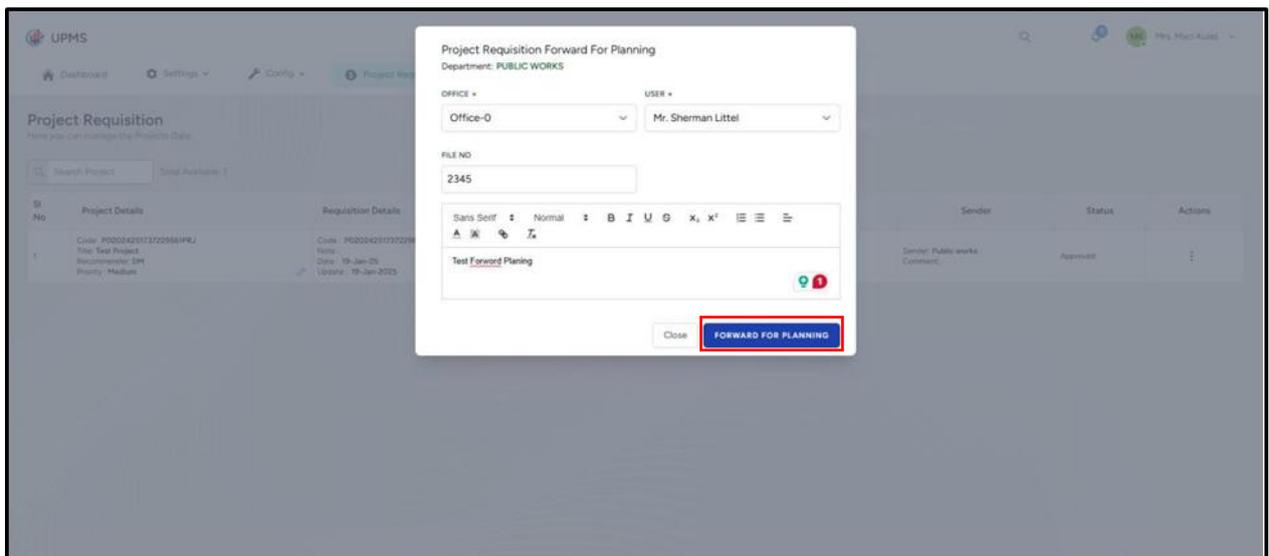
Project Information	
Name	Test Project
Description	dvj
Financial Year	2024-25
Project Mode	New
Admin Department	PUBLIC WORKS
Work Department	PUBLIC WORKS
Registration Date	19-Jan-25
Recommender	DM

UPMS Version 2.0

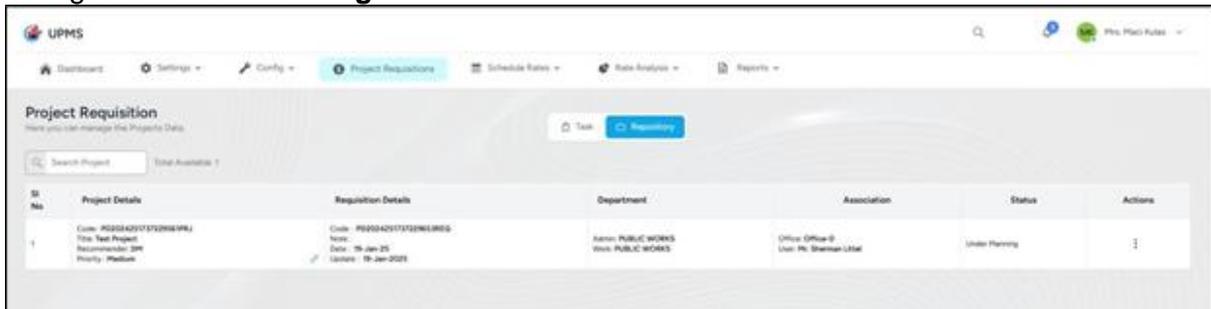
Now, Executive Authority have to forward this requisition to a **Project Planner** using **Forward to Planning** under Action button.



A modal will open and you have to put Office, User (whom you want to forward to create the Project Plan), file number and Description. Finally click on **Forward for planning** button.

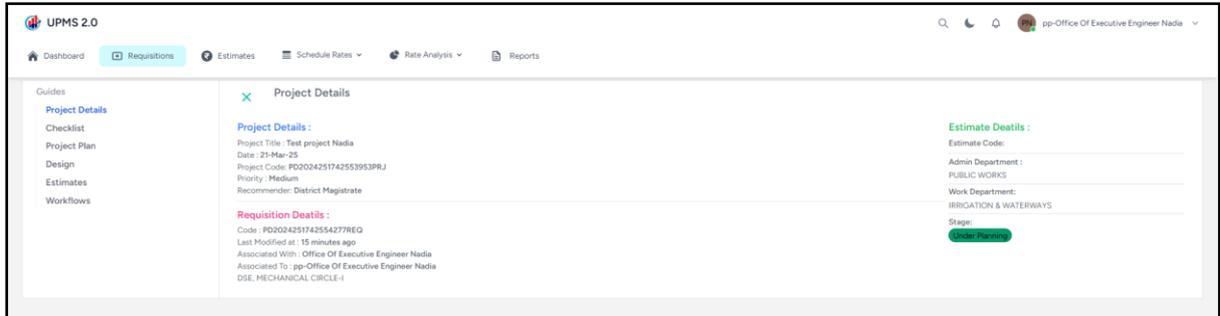


Now, you can see that the requisition is shifted from **Task** to **Repository** tab and the status is changed to **Under Planning**.

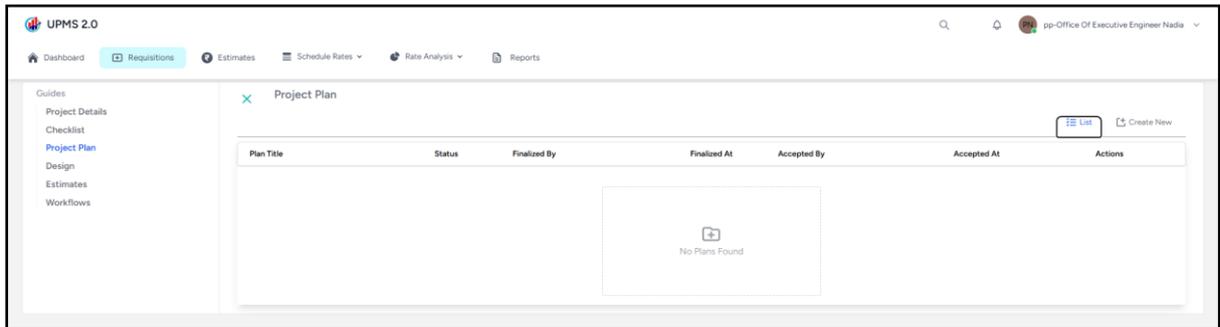


d) Planning

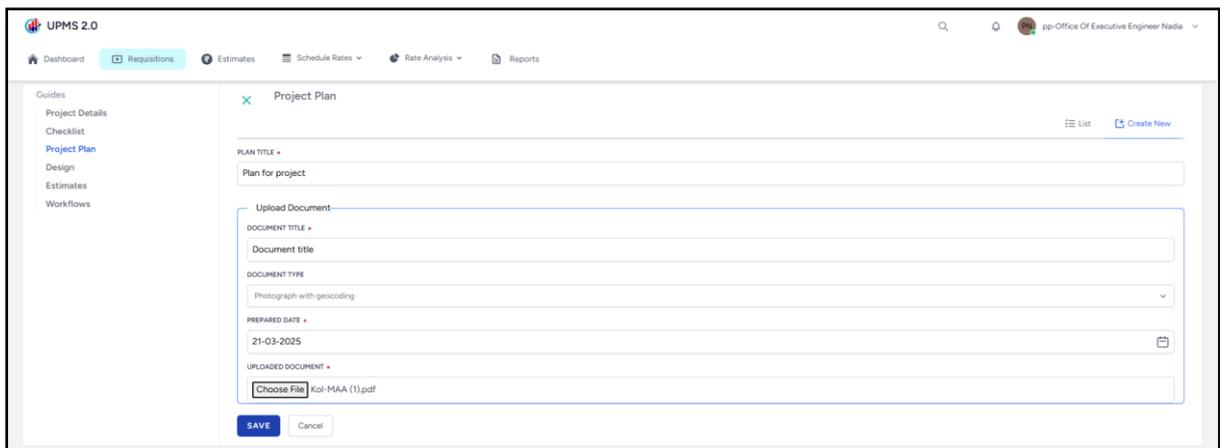
Now, login as a **Project Planner** as he has the permission to create the project plan. After login successfully, click on the **requisition** menu, the requisition list will be open. Then select the particular requisition and click on view button under action.



Here, Project Planner can see the project, requisition details in the show page. In the left sidebar, there are option project plans. Click on that, it will redirect to project plan list page.

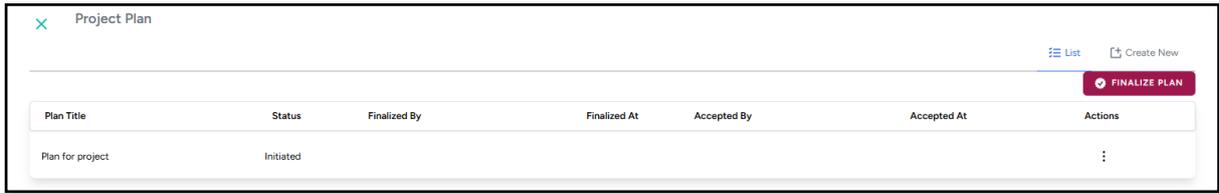


There is a button Add new, click on that to create a project plan. A form will open on the screen.



UPMS Version 2.0

Put Plan title, document title, document type and upload the document then click on the save button.



The screenshot shows a table titled "Project Plan" with a "FINALIZE PLAN" button in the top right corner. The table has the following columns: Plan Title, Status, Finalized By, Finalized At, Accepted By, Accepted At, and Actions. A single row is visible with the following data: Plan Title: Plan for project, Status: Initiated, and Actions: a vertical ellipsis icon.

Plan Title	Status	Finalized By	Finalized At	Accepted By	Accepted At	Actions
Plan for project	Initiated					⋮

Click on the **Finalize Plan** button. The plan will be saved successfully and status will be change to **Plan Completed**.

This effect of status change can see **Executive Authority** also from his login.

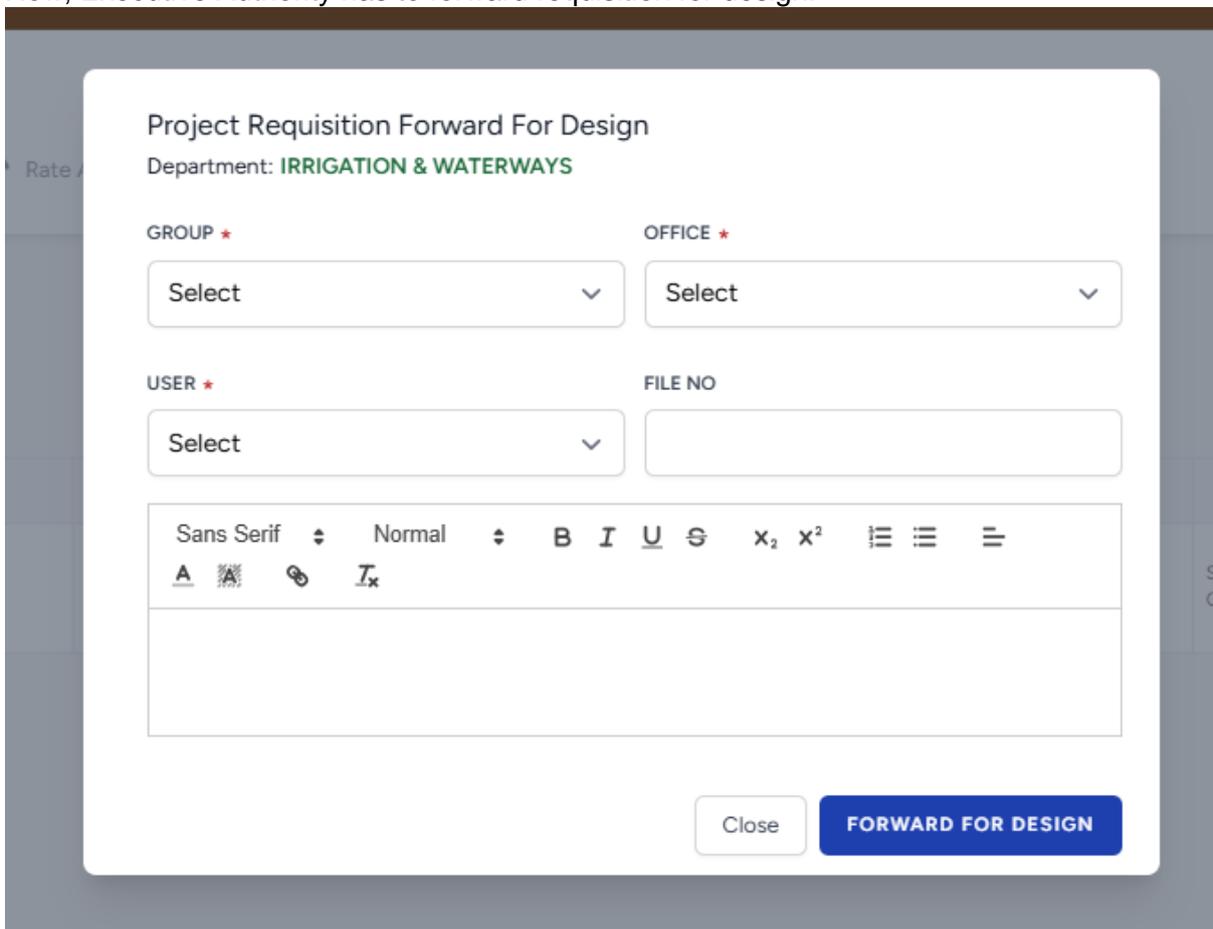
Now, Executive Authority has to approve the plan. After the approval the status will change to **Plan Accepted**.



The screenshot shows a table with columns: SI No, Project Details, Requisition Details, Department, Association, Sender, Status, and Actions. A single row is visible with the following data: SI No: 1, Project Details: Code: P020242517425353PRJ, Title: Test project Nadia, Recommender: District Magistrate, Priority: Medium; Requisition Details: Code: P020242517425342798Q, Last Modified: 21-Mar-2025, Updated: 21-Mar-2025; Department: Admin: PUBLIC WORKS, Work: IRRIGATION & WATERWAYS; Association: Office: Office Of Executive Engineer Nadia, User: ee-Office Of Executive Engineer Nadia, Barikata; Sender: pp-Office Of Executive Engineer Nadia, Comment:; Status: Plan Accepted; Actions: View, Forward For Design, Skip Design.

SI No	Project Details	Requisition Details	Department	Association	Sender	Status	Actions
1	Code: P020242517425353PRJ Title: Test project Nadia Recommender: District Magistrate Priority: Medium	Code: P020242517425342798Q Last Modified: 21-Mar-2025 Updated: 21-Mar-2025	Admin: PUBLIC WORKS Work: IRRIGATION & WATERWAYS	Office: Office Of Executive Engineer Nadia User: ee-Office Of Executive Engineer Nadia Barikata	Sender: pp-Office Of Executive Engineer Nadia Comment:	Plan Accepted	⋮ View Forward For Design Skip Design

Now, Executive Authority has to forward requisition for design.



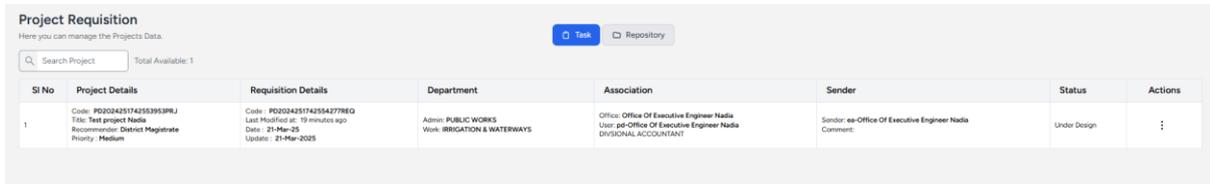
The screenshot shows a form titled "Project Requisition Forward For Design" for the Department of "IRRIGATION & WATERWAYS". The form contains the following fields and controls:

- GROUP * (Dropdown menu with "Select" and a downward arrow)
- OFFICE * (Dropdown menu with "Select" and a downward arrow)
- USER * (Dropdown menu with "Select" and a downward arrow)
- FILE NO (Text input field)
- Rich text editor with a toolbar containing: Sans Serif, Normal, Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Subscript (x₂), Superscript (x²), Bulleted List, Numbered List, and Indent List.
- Buttons: "Close" and "FORWARD FOR DESIGN" (in blue).

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A modal will open, select respective group, office and user, file number and description are optional. Now click on the **Forward for Design** button.

Then the requisition will send to project designer and the status will be changed to **Under Design**.



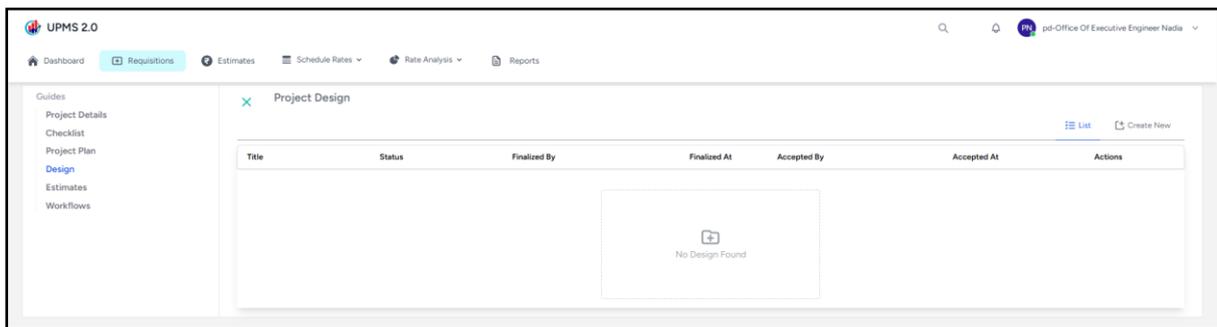
The screenshot shows a table titled "Project Requisition" with the following columns: SI No, Project Details, Requisition Details, Department, Association, Sender, Status, and Actions. A single row is visible with the following data:

SI No	Project Details	Requisition Details	Department	Association	Sender	Status	Actions
1	Code: PD202403251742553953PRJ Title: Test project Nadia Requisitioner: District Magistrate Priority: Medium	Code: PD202403251742554277REG Last Modified at: 19 minutes ago Date: 21-Mar-25 Update: 21-Mar-2025	Admin: PUBLIC WORKS Work: IRRIGATION & WATERWAYS	Office: Office Of Executive Engineer Nadia User: pd-Office Of Executive Engineer Nadia DIVISIONAL ACCOUNTANT	Sender: ee-Office Of Executive Engineer Nadia Comment:	Under Design	⋮

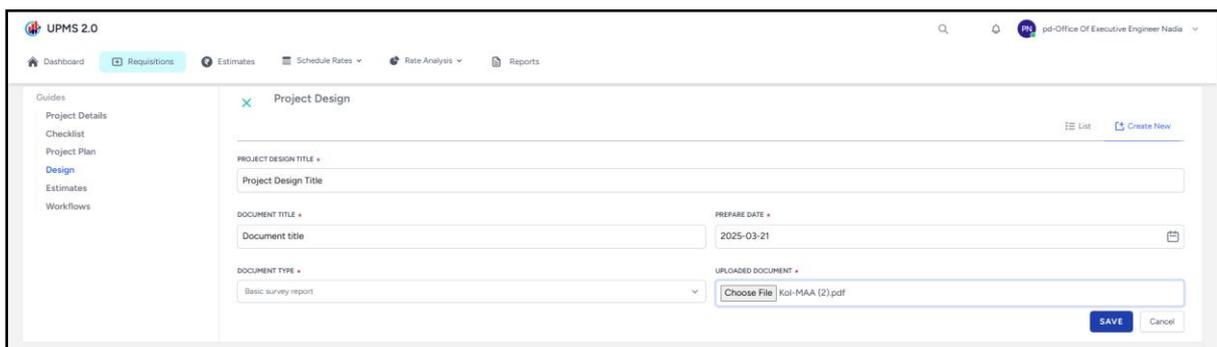
e) Designing

Now, for project design, user have to login as a **Project Designer** role.

After login successfully, click on the **requisition** menu, the requisition list will be open. Then select the particular requisition and click on view button under action.



Click on the Design menu at left sidebar, it will redirect to project design list page. Now click on the **Add New** button and it will open a form to add project Design.



The screenshot shows the "Project Design" form. The left sidebar is the same as in the previous screenshot. The form fields are:

- PROJECT DESIGN TITLE: Project Design Title
- DOCUMENT TITLE: Document title
- PREPARE DATE: 2025-03-21
- DOCUMENT TYPE: Basic survey report
- UPLOADED DOCUMENT: Choose File koi-MAA (2).pdf

Buttons: SAVE, Cancel

Put all the details and click on save button.

Click on the **Finalize Plan** button. The design will be saved successfully and status will be change to **Design Completed**.

This effect of status change can see **Executive Authority** also from his login.

Now, Executive Authority has to approve the design. After the approval the status will change to **Design Accepted**.

f) Forward Estimate with title

UPMS Version 2.0

Now, Executive Authority has to forward the requisition for Estimate of the project.

The screenshot shows a web form titled "Project Requisition Forward For Estimate" with the department "IRRIGATION & WATERWAYS". The form contains several required fields marked with a red asterisk: "ESTIMATE APPROVAL CATEGORY", "ESTIMATE TITLE", "GROUP", "OFFICE", and "USER". Each of these fields is a dropdown menu currently showing "Select". There is also a "FILE NO" text input field. Below the input fields is a rich text editor with a toolbar containing options for font style (Sans Serif, Normal), bold (B), italic (I), underline (U), strikethrough (ABC), subscript (x₂), superscript (x²), bulleted list, numbered list, and indent. The text area contains the placeholder "Write comments...". At the bottom right, there are two buttons: a "Close" button and a blue "FORWARD FOR ESTIMATE" button.

Put Estimate approval category, Estimate title, Group, Office and User. Then click on the **Forward for Estimate** button.

The requisition will forward to junior engineer for the estimate preparation, because junior engineer has the permission to create the estimate.

Create Estimate

Log in: Start by logging into the platform using your credentials as a **Junior Engineer**.

Access the Dashboard: Once logged in, the system will redirect you to the dashboard, which will be displayed on your screen.

After Design Complete **Executive Authority** forward for Estimate creation.

Now, click on the **Forward for Estimate** button, a form will open. Select Estimate Approval Category and Estimate Title. Click on the **Forward for Estimate** button.

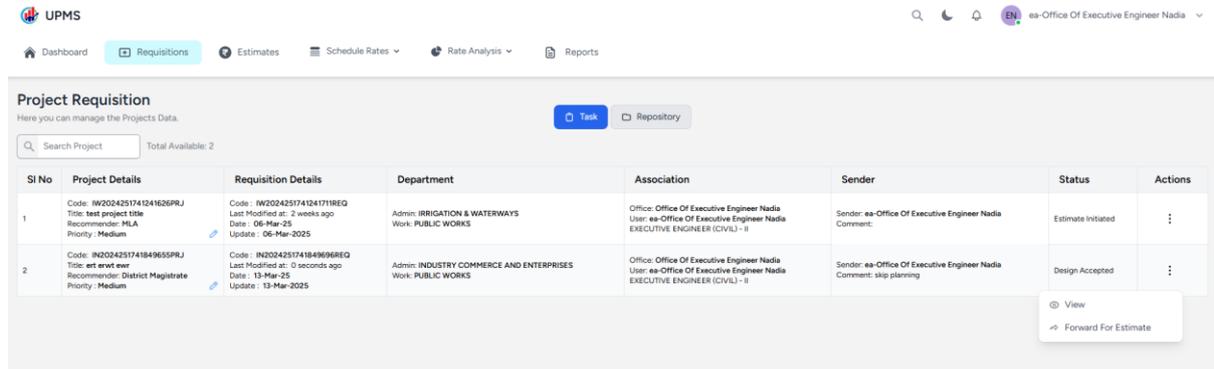


Figure: 1

Project Requisition Forward For Estimate
Department: PUBLIC WORKS

ESTIMATE APPROVAL CATEGORY *

Select

ESTIMATE TITLE *

GROUP * OFFICE *

Select Select

USER * FILE NO

Select

Sans Serif Normal B I U x₂ x²

Write comments...

Close **FORWARD FOR ESTIMATE**

Figure: 2

UPMS Version 2.0

Click on the view button of an estimate from Estimate list. It will redirect to that estimates' item list

Now, click **Estimates** Menu list of Estimate list show. **Executive Authority** forward Estimate click view button show Details of project and as well as requisition. This Section **Estimate Items** menu Click and redirect Add Estimate Item page.

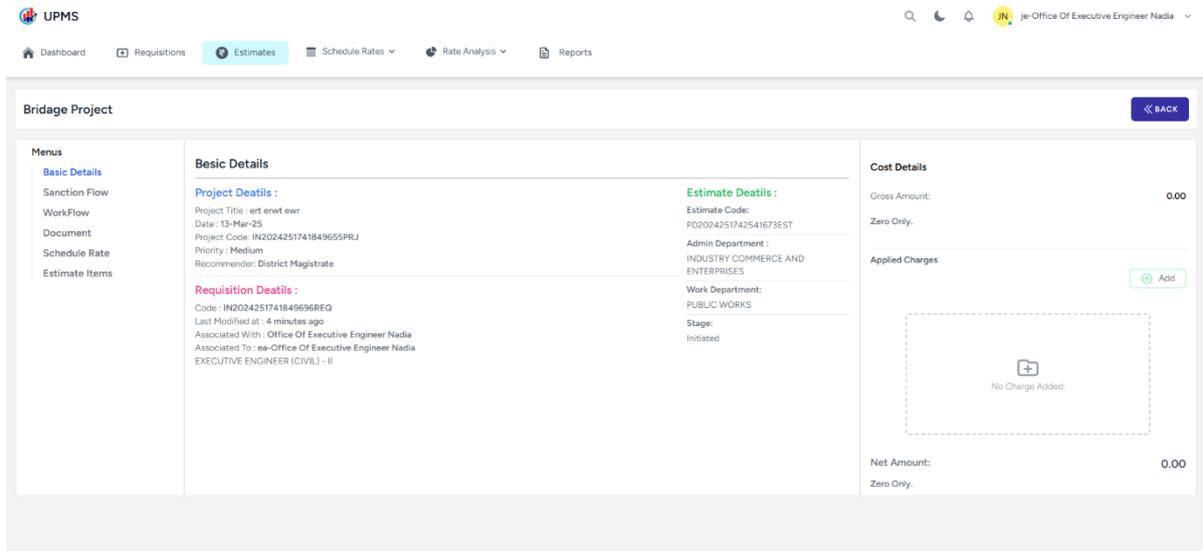


Figure: 1

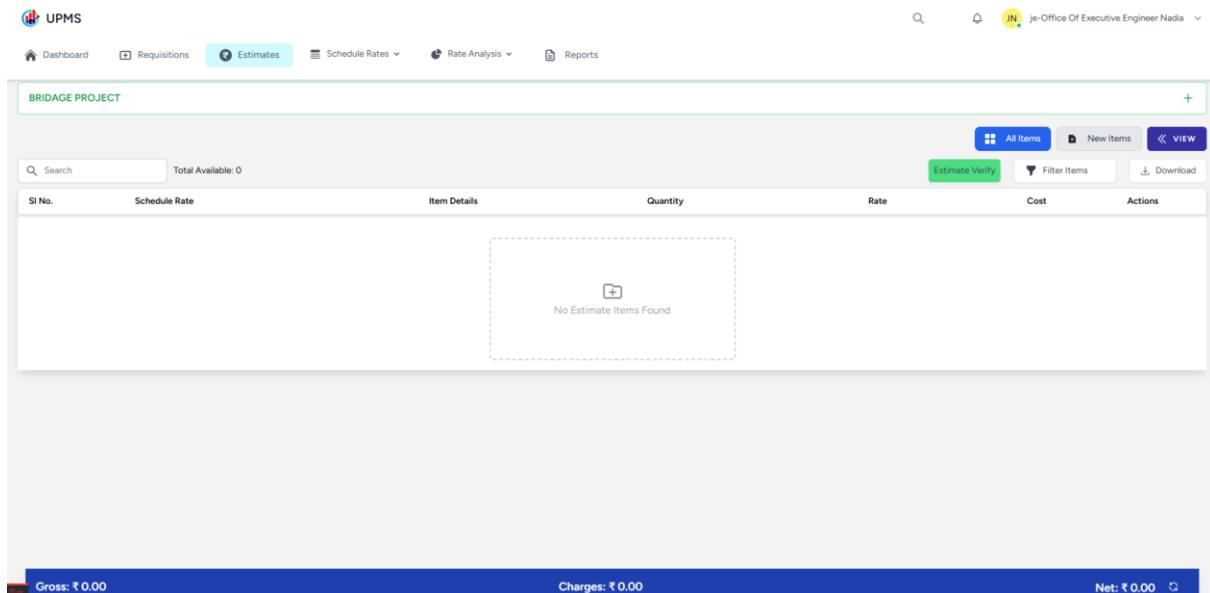


Figure: 2

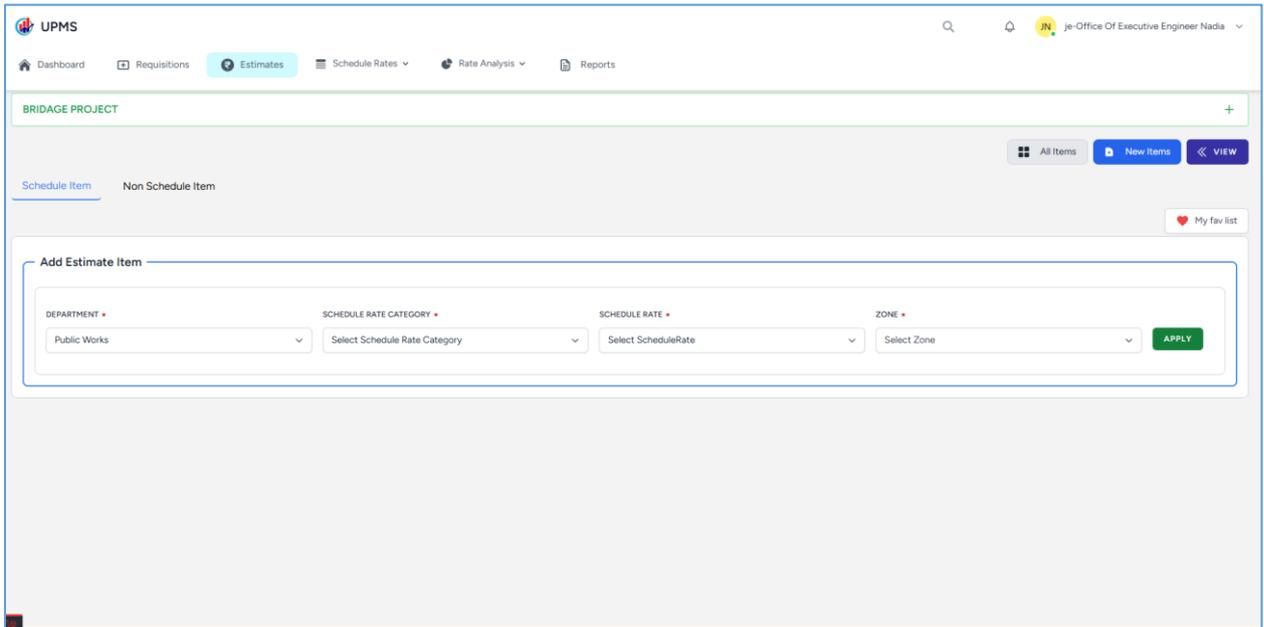
This page add Estimate Item all works departments.

Add estimate item

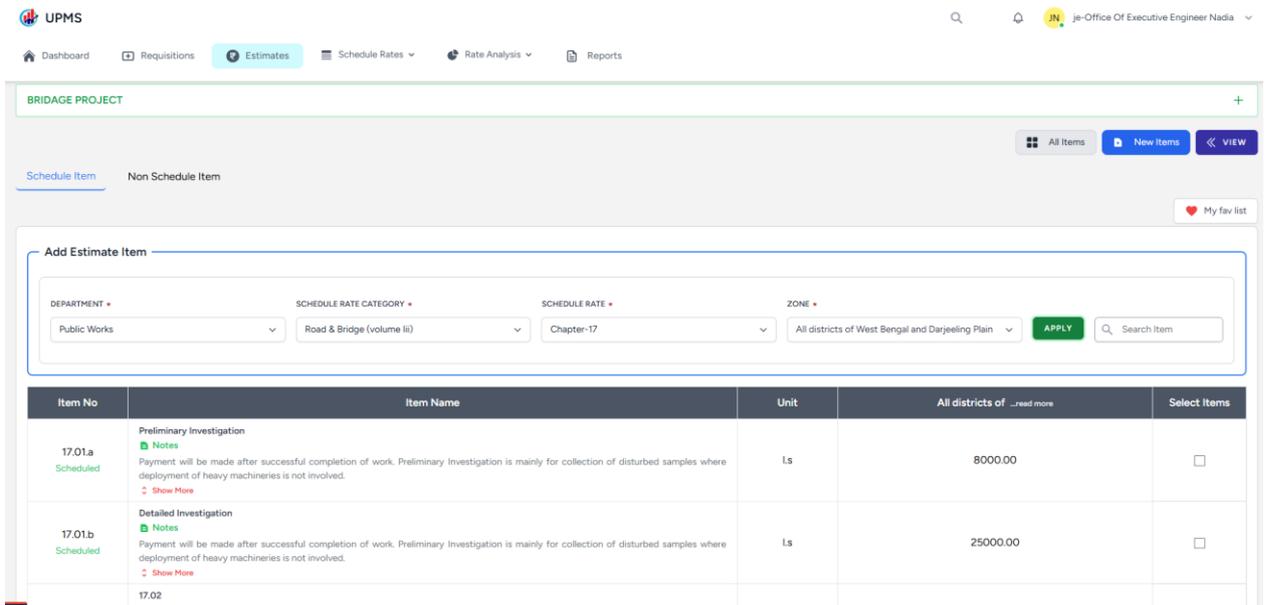
Any **Schedule** and **Non-schedule** item add click **New Item** button. After click button show this page.

Here you can apply filter Department, Schedule Rate Category, Schedule Rate, and Zone wise.

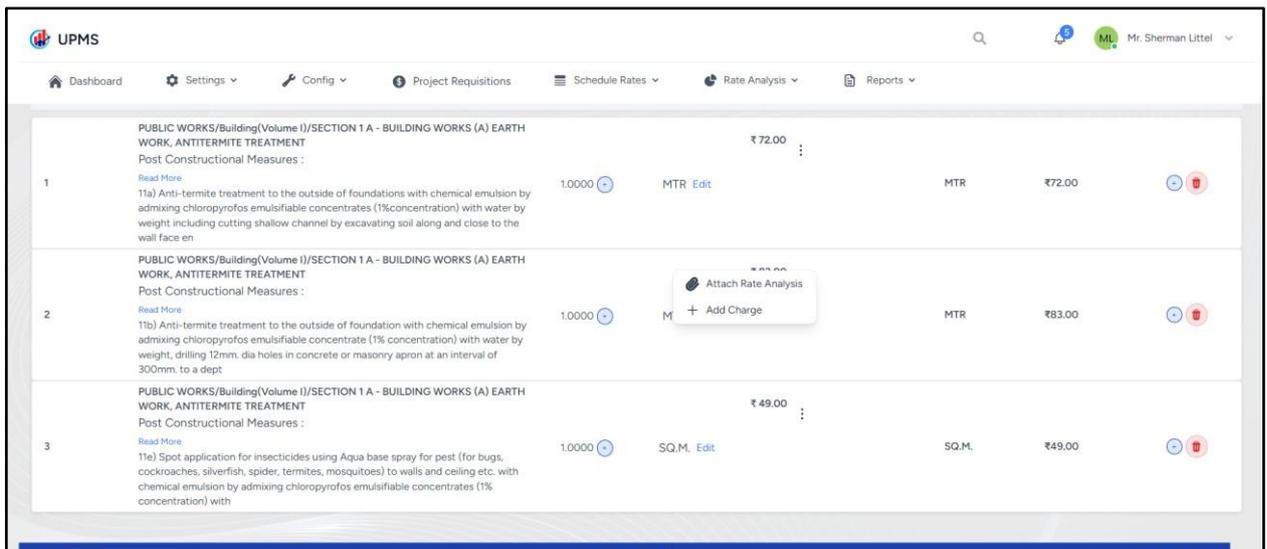
UPMS Version 2.0



After Filter click on checkbox and select items and click on Save Button.



Here you can see the Estimate Item List If Charges is required then you can Add Charges.



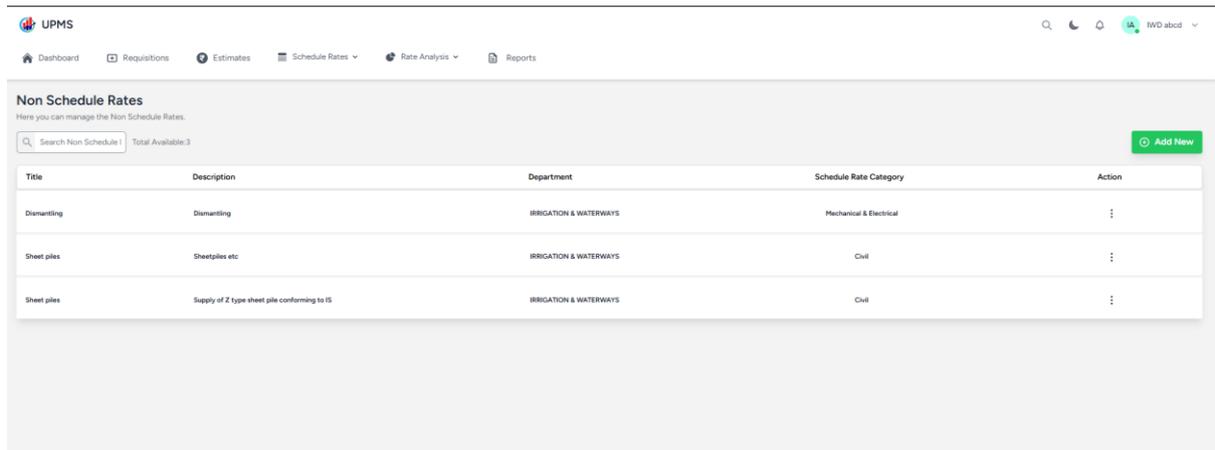
Add Non-schedule Item

Non-schedule Rate:

Log in: Start by logging into the platform using your credentials as a **Junior Engineer**.

Access the Dashboard: Once logged in, the system will redirect you to the dashboard, which will be displayed on your screen.

After login **Schedule Rates** menu inside **Non Schedule items** menu click Add Non-schedule Rate list.



Add New Button click to Add Non-schedule rate. a form will open Non-schedule title and Description all fill up **save** button click

Create Non Schedule Rate

DEPARTMENT *
Please Select Department

SCHEDULE RATE CATEGORY *
Please Select Rate Category

FINANCIAL YEAR *
Please Select Financial Year...

TITLE *
Enter Title

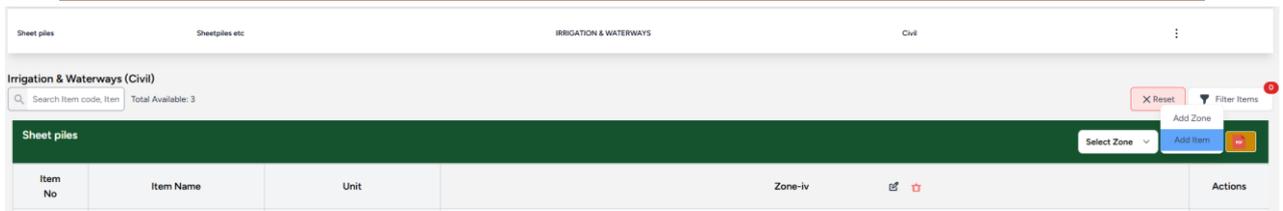
DESCRIPTION *
Please fill out this field.

NOTES
Please fill out this field.

SAVE Cancel

After Non-schedule Rate save Add Zone and Add item

UPMS Version 2.0



Create Non Schedule Zone

NAME *

REF CODE

SAVE Cancel

Add zone name add click **save** button

Create Non Schedule Item

ITEM NAME

ITEM CODE *

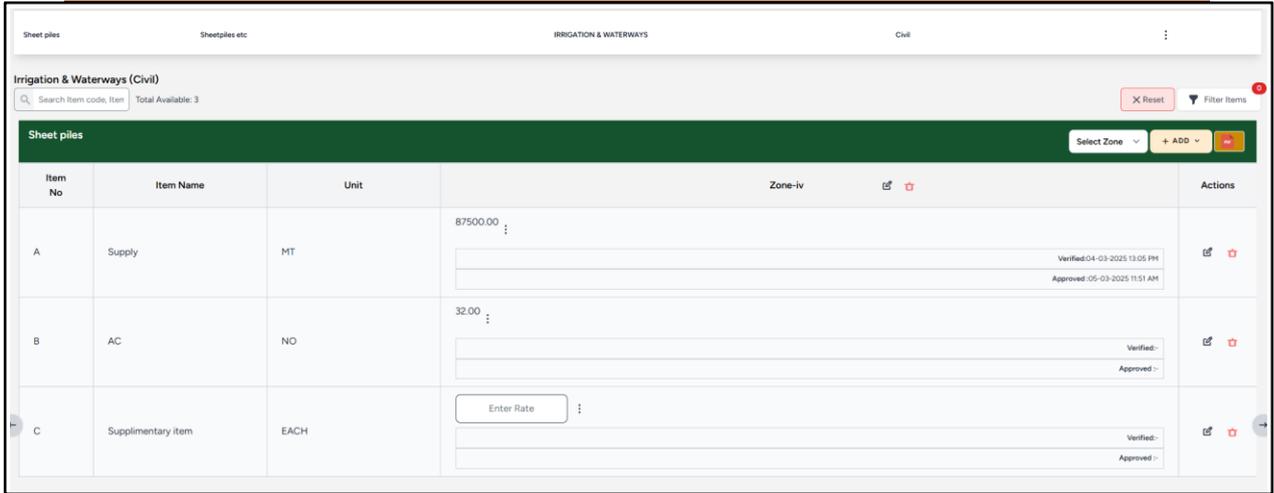
UNIT *

Item Notes

SAVE Cancel

Add Item name all forms fill up click **save** button

UPMS Version 2.0

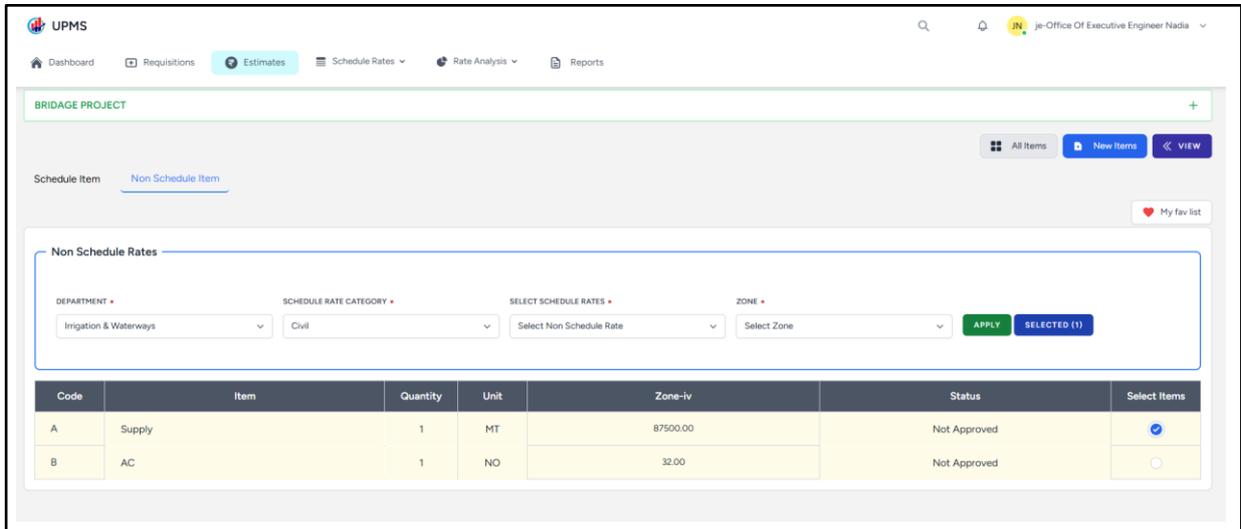


Non Schedule item rate add zone name blanks enter Rate section .After cost enter **update Rate** button click supporting document (pdf) upload file.

After Cost Update Verify Rate Click rate section menu **Verify Rate** button click and rate is verified.

Add Non-Schedule item in Estimates

Here you can apply filter Department, Schedule Rate Category, Schedule Rate, and Zone wise. Selected button click add item in estimate.



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List of estimate items						
UPMS je-Office Of Executive Engineer Nadia						
Dashboard Requisitions Estimates Schedule Rates Rate Analysis Reports						
3	PUBLIC WORKS/Road & Bridge (Volume III)/CHAPTER-17 - SOIL BORING & TESTING WORKS	17.02 17.02 Notes Some samples are to be kept at Sub-Division Office for Additional testing By the Engineer-in-Charge. Show More	10000 LS	₹ 1,600.00 LS	₹ 1600.00	ⓘ ⊗
4	PUBLIC WORKS/Road & Bridge (Volume III)/CHAPTER-17 - SOIL BORING & TESTING WORKS	17.03 a Depth 0m to 30m Notes No item notes found! Show More	10000 METRE	₹ 150.00 METRE	₹ 150.00	ⓘ ⊗
5	PUBLIC WORKS/Road & Bridge (Volume III)/CHAPTER-17 - SOIL BORING & TESTING WORKS	17.03 b Depth greater than 30m upto 60m Notes No item notes found! Show More	10000 METRE	₹ 200.00 METRE	₹ 200.00	ⓘ ⊗
6	PUBLIC WORKS/Road & Bridge (Volume III)/CHAPTER-17 - SOIL BORING & TESTING WORKS	17.03 c Extra for boring in water (with depth of Water up to... Notes No item notes found! Show More	10000 LS	₹ 9,500.00 LS	₹ 9500.00	ⓘ ⊗
7	IRRIGATION & WATERWAYS/Civil/Zone-IV	A) Supply	10000 N/A	₹ 87,500.00 MT Zone: Zone-IV	₹ 87500.00	ⓘ ⊗
Gross: ₹ 44450.00		Charges: ₹ 0.00		Net: ₹ 44450.00		

* Color changes list section Non-schedule item

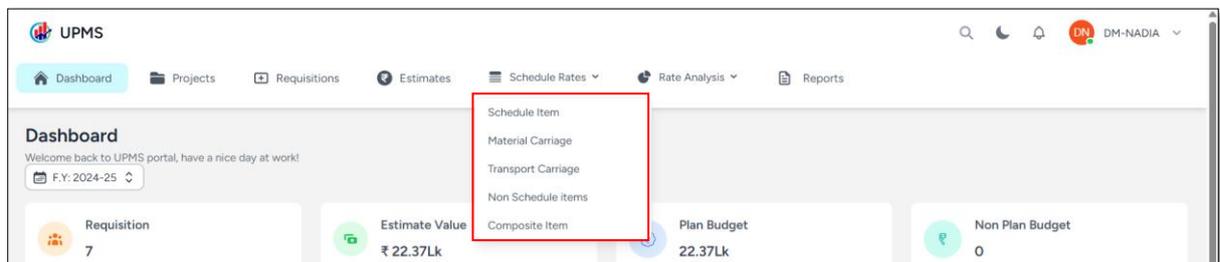
Schedule of Rates (SOR) – UPMS

The **Schedule of Rates (SOR)** is a **digital compendium** that provides standardized rates for various items, categorized by different geographical regions. It serves as a comprehensive reference for cost estimation, ensuring consistency and accuracy in pricing across locations.

Steps to View and Manage SOR in the UPMS Project

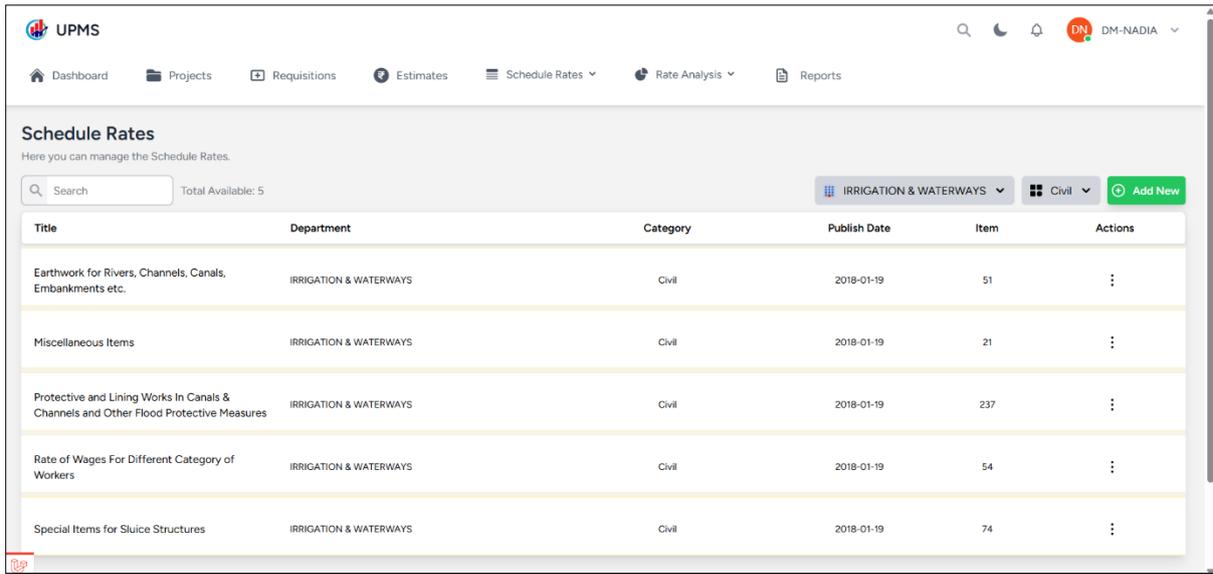
1. Go to dashboard select menu **Schedule Rates**, a dropdown will show four different types of SORs.

- Schedule rate
- Material carriage
- Transport carriage
- Composite rates



UPMS Version 2.0

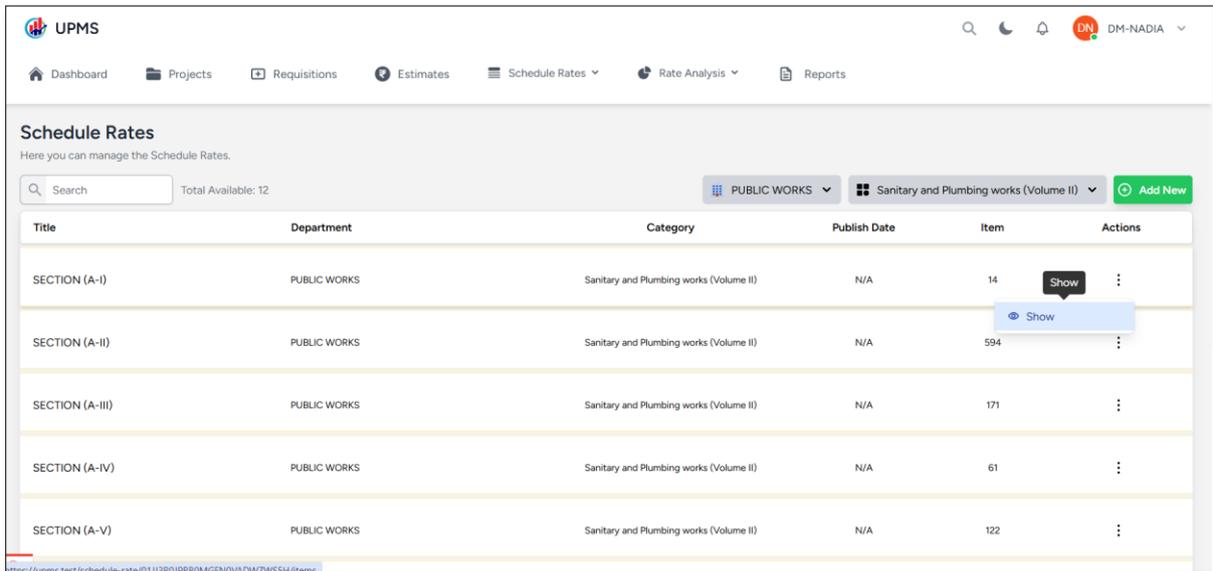
2. Select the menu **Schedule item** to open the window.



List is displayed of selected department with details like title, department, and category, publish date, item count, and Action button.

Clicking on 'Action' button will list the three menu Edit, Delete and Show.

Note: edit and delete button will only visible to the authorized role i.e. 'SOR Preparer', else only 'show' button to other users.



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3. For creating new schedule rate click on “Add New”, it will open a popup to create the new schedule rate as show below:
Fill all the details and click on “save” button to create a new schedule Rate.

The screenshot shows a 'Create New ScheduleRate' modal form. The form has the following fields and options:

- TITLE**: A text input field with the placeholder 'Enter ScheduleRates title'.
- DEPARTMENT**: A dropdown menu with the placeholder 'Please Select Department...'.
- SCHEDULE RATE CATEGORY**: A dropdown menu with the placeholder 'Please Select Rate Category'.
- FINANCIAL YEAR**: A dropdown menu with the placeholder 'Please Select Financial Year...'.
- PUBLISH DATE**: A date input field with the placeholder 'mm/dd/yyyy' and a calendar icon.
- DESCRIPTION**: A rich text editor with a toolbar containing options for font style (Sans Serif), weight (Normal), bold (B), italic (I), underline (U), link (G), and text color (x, x²), along with list and indent icons.
- NOTES**: A second rich text editor with the same toolbar as the description field.

The background shows a 'Schedule Rates' list with columns for Title, Department, and Actions. An 'Add New' button is visible in the top right of the background.

Clicking on “show” button from the action column of the schedule rate list will open the window of the schedule item with rate distribution in various geographical region (zones).

The screenshot shows the 'Schedule Item Rates' window. It features a search bar, a 'Total Available: 10' indicator, and filters for 'Verified By: On: 18-03-2025' and 'Approved By: On: 18-03-2025'. The table below shows the following data:

Sequence No	Item No	Item Name	Unit	All Districts of
1	a1i Scheduled	Original Works Supplying,fitting and fixing brass ferrule in... 25 mm dia. Notes No item notes found! Show More	each	1884.00
2	a1ii Scheduled	Original Works Supplying,fitting and fixing brass ferrule in... 20 mm dia. Notes No item notes found! Show More	each	1338.00

Table distribution shows the list of item of a schedule rate with its various zonal rates with all item details like sequence no, item no, item name, item unit, and the zones for the respective schedule rate.

Note: Item details contains the item group details with the notes of item as well as item group.

Clicking on the three dots will show the operational menus like edit, delete for group as well

As for items which will open popup with a form to modify the item as well as item group.

UPMS Version 2.0

Sequence No	Item No	Item Name	Unit	All Districts of
1	a1i Scheduled	Original Works Supplying,fitting and fixing brass ferrule in... 25 mm dia. Notes No item notes found! Show More	each	1884.00
2	a1ii Scheduled	Original Works Supplying,fitting and fixing brass ferrule in... 20 mm dia. Notes No item notes found! Show More	each	1338.00
3	a1iii Scheduled	Original Works Supplying,fitting and fixing brass ferrule in... 15 mm dia.	each	981.00

On clicking on **“edit item”** and **“edit item group”** will show the popup with a form to modify the item details and group details.
 Edit item form will show all the item details fields with searchable item group dropdown.

Update Schedule Item

NAME: 25 mm dia. UNIT: EACH

TYPE: Scheduled ITEM SLNO: a1i

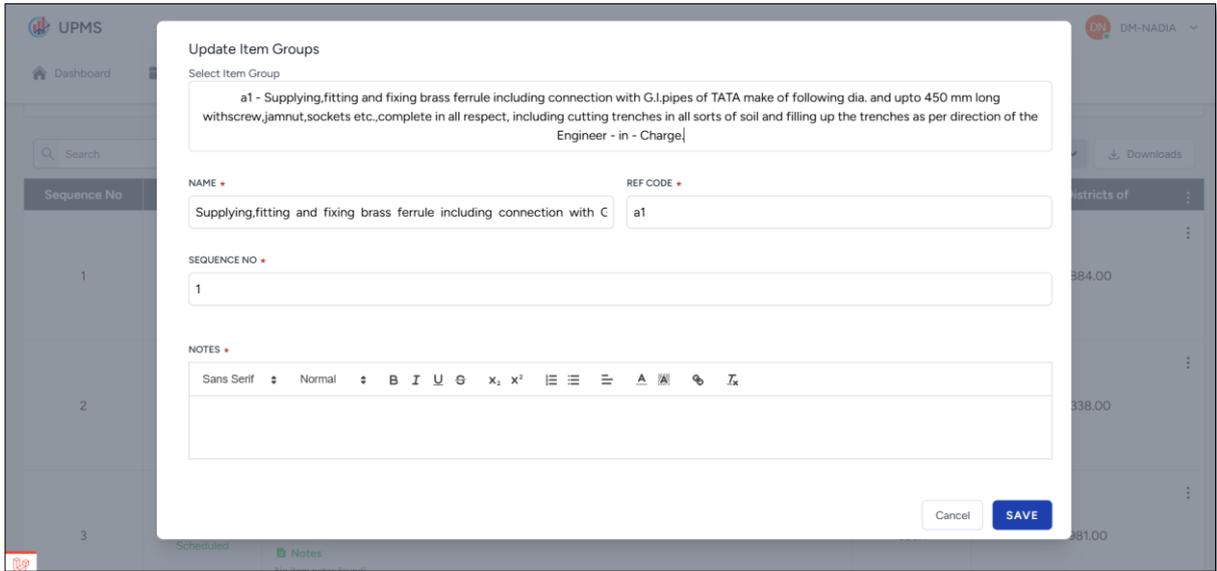
SEQUENCE NO: 1

Searchable dropdown for item groups:

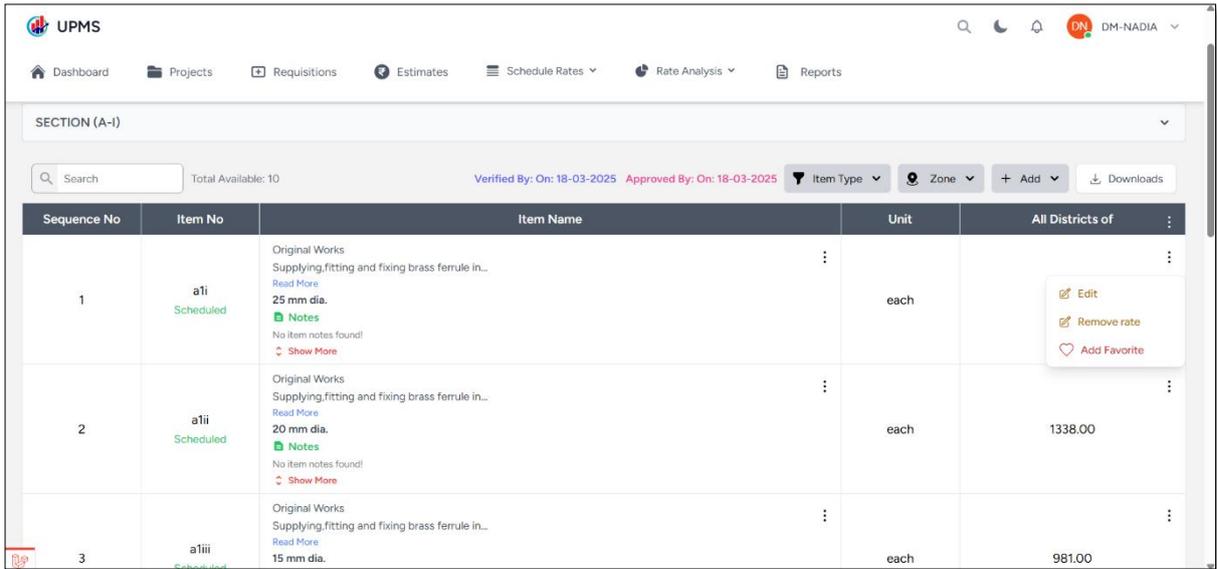
- a - Original Works
 - a1 - Supplying,fitting and fixing brass ferrule including connection with G.I.pipes of TATA make of following dia. and upto 450 mm long withscrew,jamnut,sockets etc.,complete in all respect, including cutting trenches in all sorts of soil and filling up the trenches as per direction of the Engineer - in - Charge.
 - a2 - Supplying, fitting and fixing brass ferrule including connection with P.V.C. pipe of approved make upto 450 mm long with plumbing joint,brass over C.P.

Same way we can update the item group also.
 Selecting the group will show the details of the item group like name, ref code, sequence no and notes apply the changes and click **“save”** button to save the record.

UPMS Version 2.0

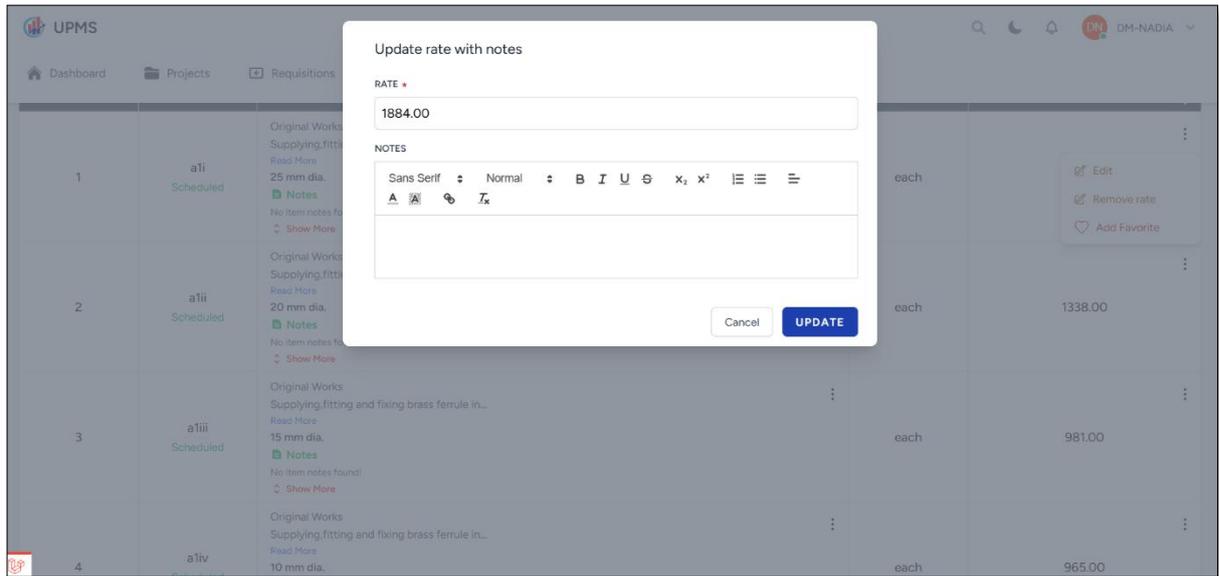


Next step to modify the rates of various zones, click on the three dots will show the operational menu like edit, remove rate, add favourite.



UPMS Version 2.0

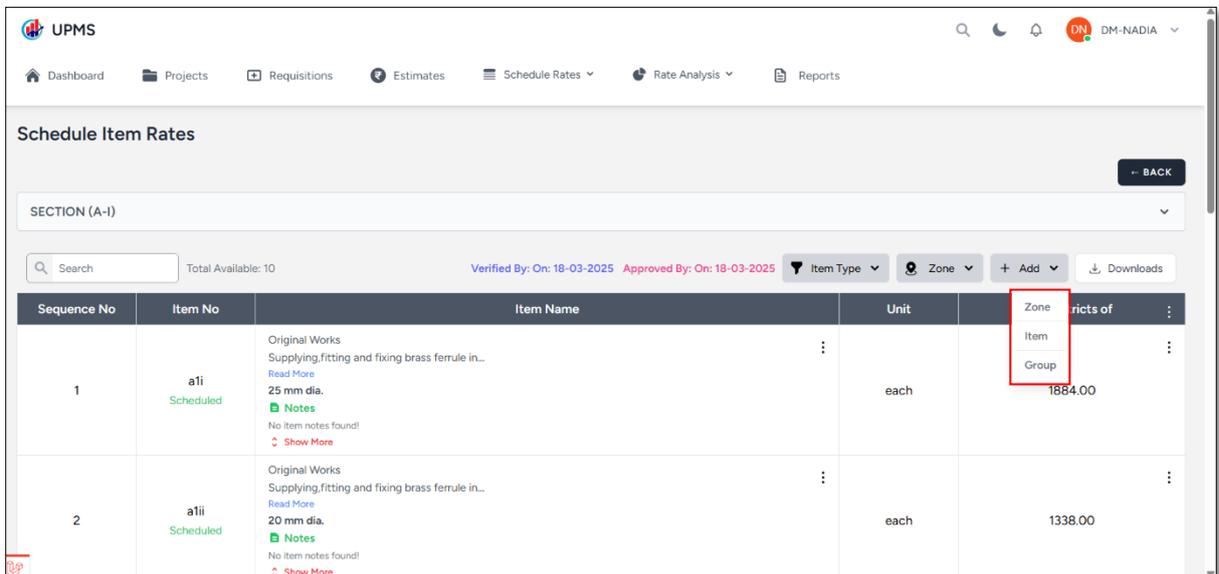
Clicking on edit button will open a popup to customize the rate for each zones of an item.



Apply the changes and click on **“update”** button to update the rate.

Next menu is **“Remove rate”** will remove the rate of the particular item zone to “-“hyphen.

Last but not the list there are several filters to filter the table item on the basis of item type, zones, and add buttons to add item, item group and zone.

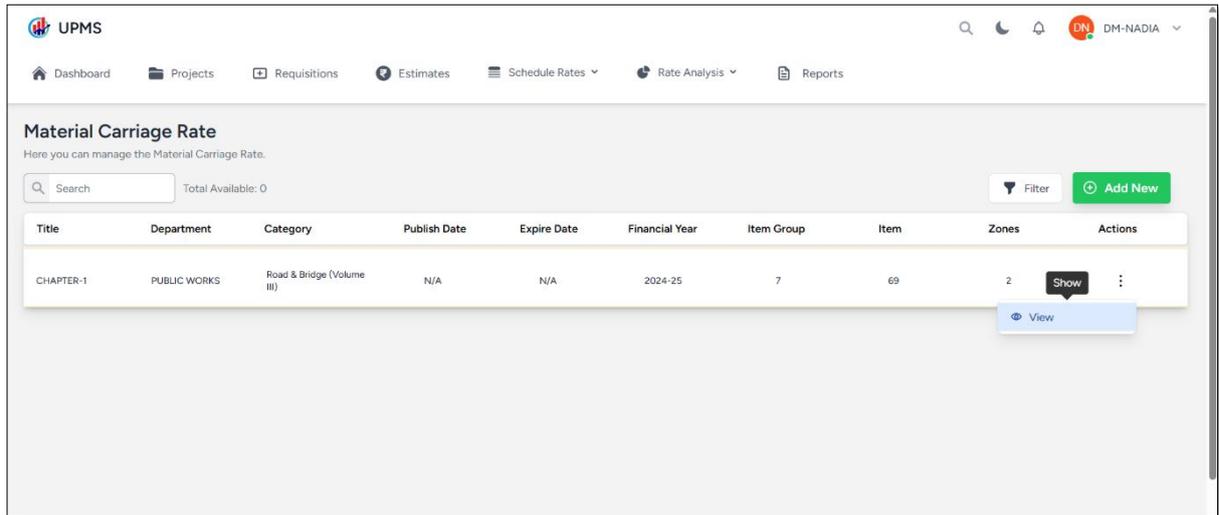


Download button will download the list as per the selection of zones.

Material Carriage Rates – UPMS

Material Carriage Rates, commonly known as the rates for loading, unloading, and stacking of items, follow the same structure as the Schedule of Rates (SOR), providing standardized cost estimates for material handling across various regions."

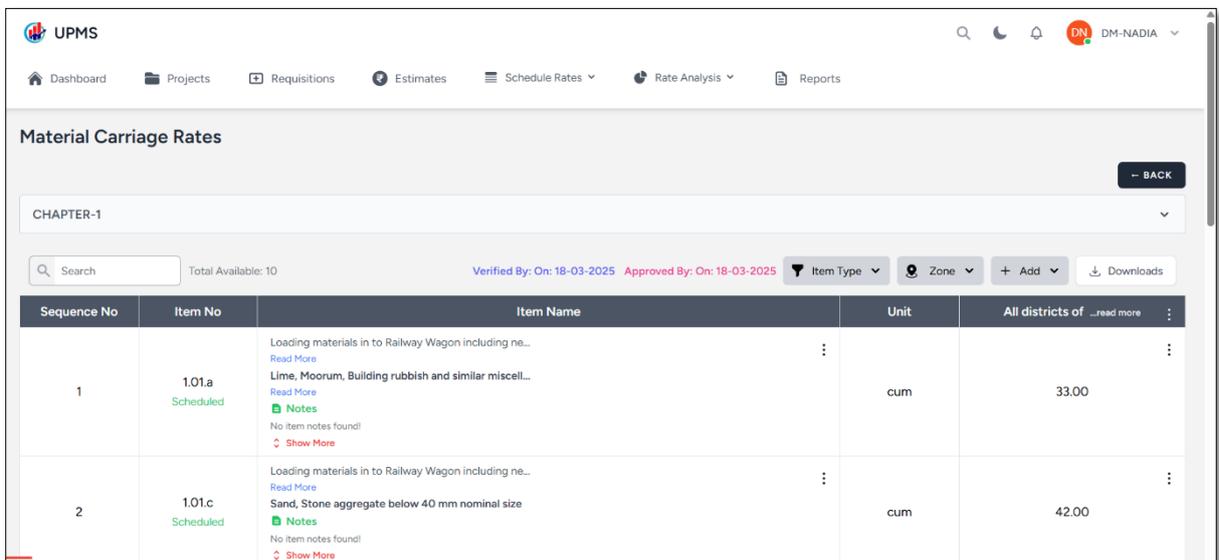
Clicking on **material carriage menu** from the schedule rate menu will open the window as shown below:



Representation of the material carriage rate is same as schedule rate where all the list of material carriage rate will be displayed with **“Action”** the three dots, with **“view”** button shown in picture.

On the top of the list we **“Add New”** button with green colour denotes the adding up the material carriage rate same as schedule rate.

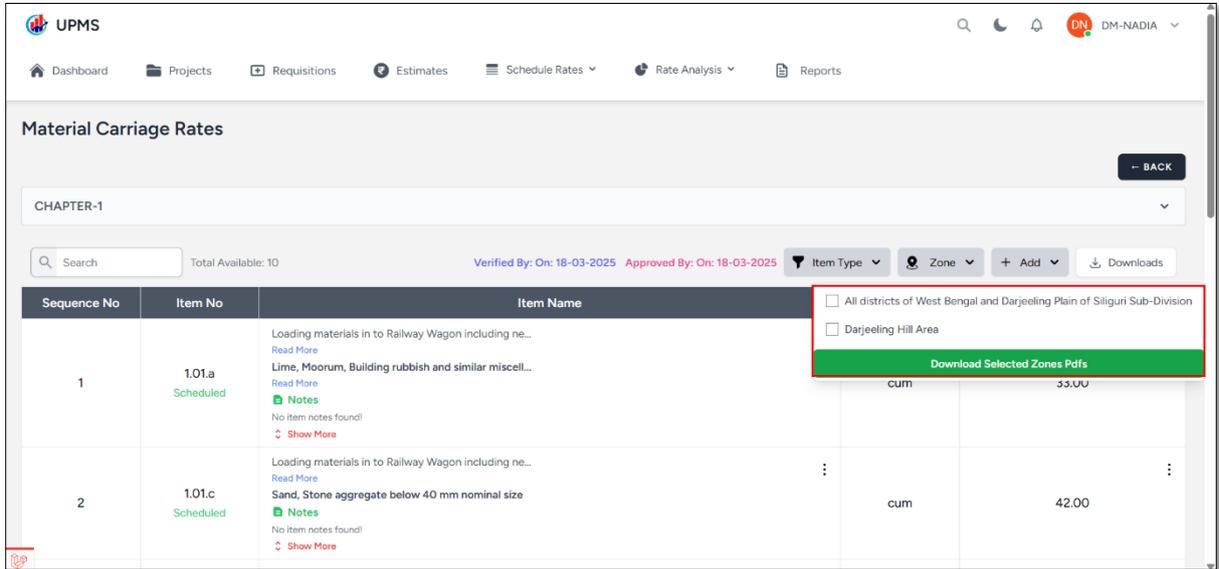
Clicking on **“view”** button will open a window for the list of item related to the material carriage rate.



UPMS Version 2.0

Note: ALL operation are same as schedule rate for material carriage.

Download button will down the item list in same format for selecting the zones of which user wants to download.

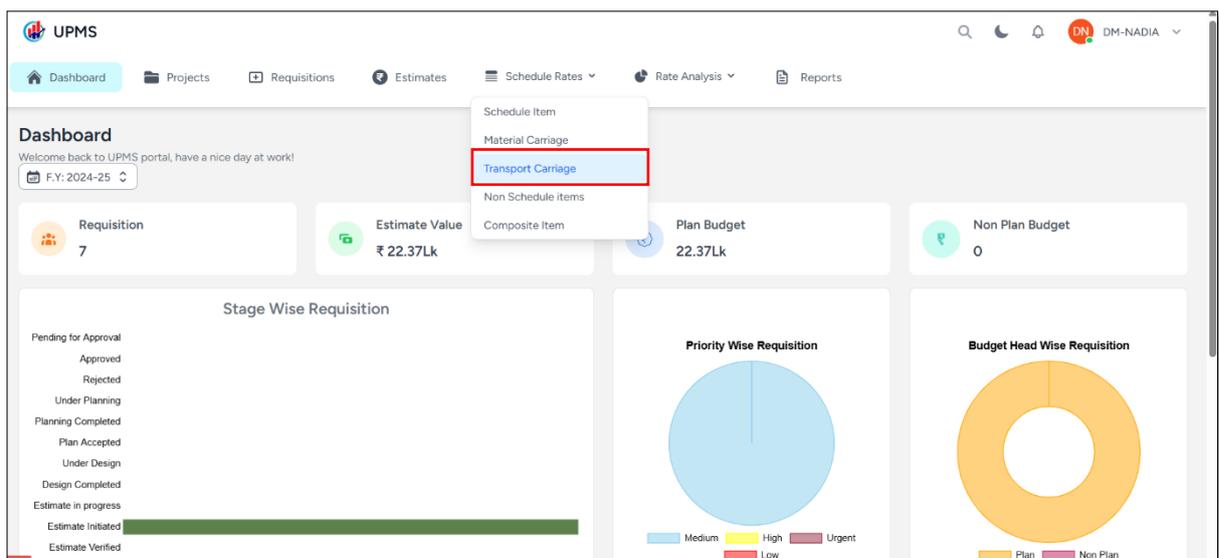


Transport Carriage Rates – UPMS

The **Transport Carriage Rate** represents the cost of transporting items from one location to another via road, boat, or train. It provides a structured table that outlines the distribution of each item based on distance ranges, along with the corresponding rate for each range.

Getting started with transport carriage rate

Step 1. Go the menu transport carriage from dashboard window.



UPMS Version 2.0

On clicking Transport carriage will lead to the transport carriage window as show here the list of transport carriage is displayed.

Title	Department	Category	Publish Date	Expire Date	Financial Year	Item	Zones	Actions
Carrying charges of materials	PUBLIC HEALTH ENGINEERING	CIVIL	2019-07-01	N/A	2024-25	1	1	Show
TABLE:T-2	PUBLIC WORKS	Building(Volume I)	2025-03-04	N/A	2024-25	1	2	Show
TABLE 1	PUBLIC WORKS	Road & Bridge (Volume III)	N/A	N/A	2024-25	11	2	Show
TABLE 2	PUBLIC WORKS	Road & Bridge (Volume III)	N/A	N/A	2024-25	4	2	Show

On each list on “**Action**” column click on three dots which will show the **edit delete** and **show** button.

Note: edit and delete button will only visible to the authorized role i.e. ‘**Sor Preparer**’, else only ‘**show**’ button to other users.

Clicking on the **show** button will lead to the table distribution window of item with the rate according to distance range as shown below:

Item No	Item	Unit	All Zones Of West Be...																								
SEC - C, Item-8(i)	M.S. Rod, D.I. Pipe,... (Scheduled)	MT	<table border="1"> <thead> <tr> <th>Distance Range</th> <th>Rate</th> <th>Per unit Distance Rate</th> <th>Is Onward Distance rate?</th> </tr> </thead> <tbody> <tr> <td>0-5 km</td> <td>44.42</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>5-10 km</td> <td>24.87</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>10-15 km</td> <td>23.20</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>15-25 km</td> <td>19.84</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>25-50 km</td> <td>15.68</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Distance Range	Rate	Per unit Distance Rate	Is Onward Distance rate?	0-5 km	44.42	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5-10 km	24.87	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10-15 km	23.20	<input checked="" type="checkbox"/>	<input type="checkbox"/>	15-25 km	19.84	<input checked="" type="checkbox"/>	<input type="checkbox"/>	25-50 km	15.68	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Distance Range	Rate	Per unit Distance Rate	Is Onward Distance rate?																								
0-5 km	44.42	<input checked="" type="checkbox"/>	<input type="checkbox"/>																								
5-10 km	24.87	<input checked="" type="checkbox"/>	<input type="checkbox"/>																								
10-15 km	23.20	<input checked="" type="checkbox"/>	<input type="checkbox"/>																								
15-25 km	19.84	<input checked="" type="checkbox"/>	<input type="checkbox"/>																								
25-50 km	15.68	<input checked="" type="checkbox"/>	<input type="checkbox"/>																								

Table shows the item number, item name, and unit and zone wise rate for each distance range for a particular item.

On the top of the table there are two section transport carriage **description** and **notes**.

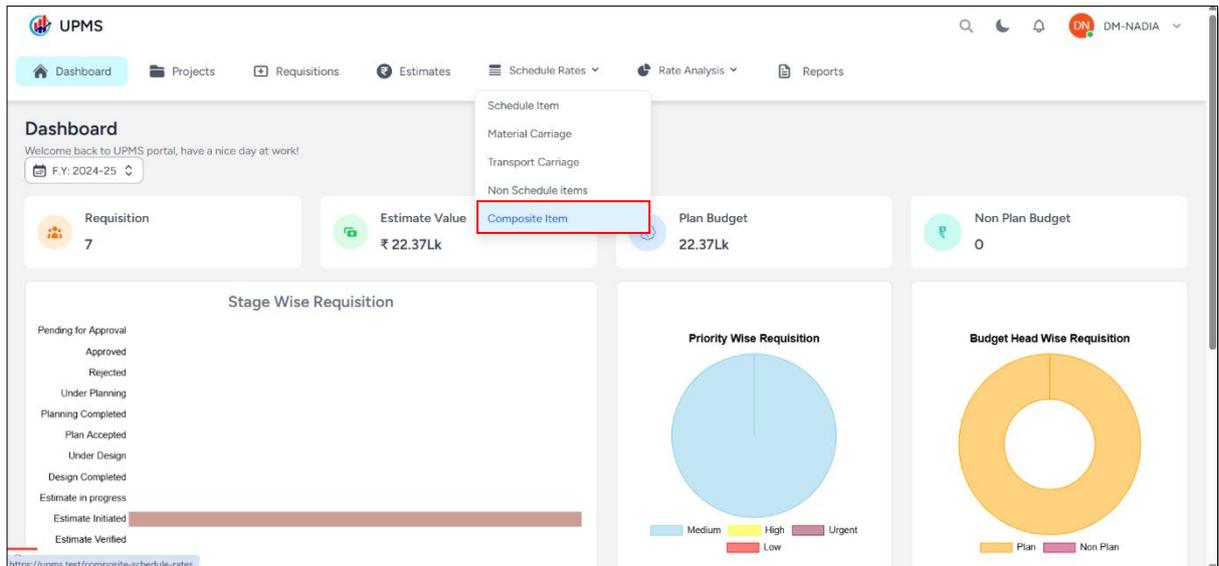
On the right end of table there is a dropdown to filter the zones and a button to download the transport carriage list in pdf format.

Composite Rates – UPMS

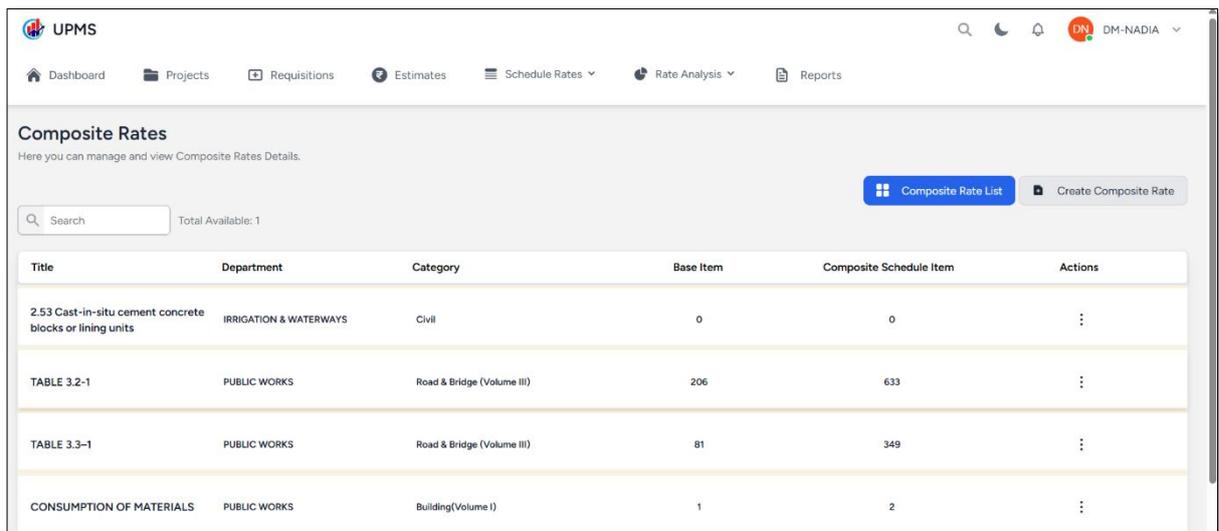
The **Composite Rate** is also known as the **Incomplete Rate**, as it consists of both base items and composed items that together form a complete rate. This table represents each base item along with its corresponding composed items, including their unit and quantity details.

Proceeding with the Composite rate

Step 1. Go to dashboard select the composite item from schedule rate menu.



Clicking on the menu will lead to the composite rate window where list of composite rate list is displayed with the details of base item and composed item count.



On clicking the “**create composite rate**” tab stepper with form fields will open where details related to the base item and composed item needs to be filled.

Composite rate details form:

UPMS Version 2.0

The screenshot shows the 'Create Composite Rate' form in the UPMS application. The form is titled 'Create Composite Rate' and has three tabs: 'Composite-Rate-Details' (active), 'Create-Base-Item', and 'Create-Composed-Item'. The 'Composite-Rate-Details' tab contains the following fields:

- TITLE**: A text input field with the placeholder 'Enter Title'.
- DEPARTMENT**: A dropdown menu with the placeholder 'Department'.
- SCHEDULE RATE CATEGORY**: A dropdown menu with the placeholder 'Please Select Rate Category'.
- FINANCIAL YEAR**: A dropdown menu with the value '2024-25'.
- PUBLISH DATE**: A date input field with the placeholder 'mm/dd/yyyy'.
- DESCRIPTION**: A rich text editor with a toolbar containing options for font style (Sans Serif, Normal), bold (B), italic (I), underline (U), strikethrough (ABC), text color (x, x²), list (bulleted, numbered), indent (left, right), link (A), and unlink (A).

At the top right of the form, there are two buttons: 'Composite Rate List' and 'Create Composite Rate'.

filling the required fields to and click on button “**next step**” to move to the next form where details for base item needs to be filled shown below. Second step of the form contains two dropdowns **schedule rate** and **base group**, select the schedule rate base item on which composed item needs to be added through checkbox we can add multiple at once.

The screenshot shows the 'Create Composite Rate' form in the UPMS application, specifically the 'Create-Base-Item' tab. The form contains the following fields and content:

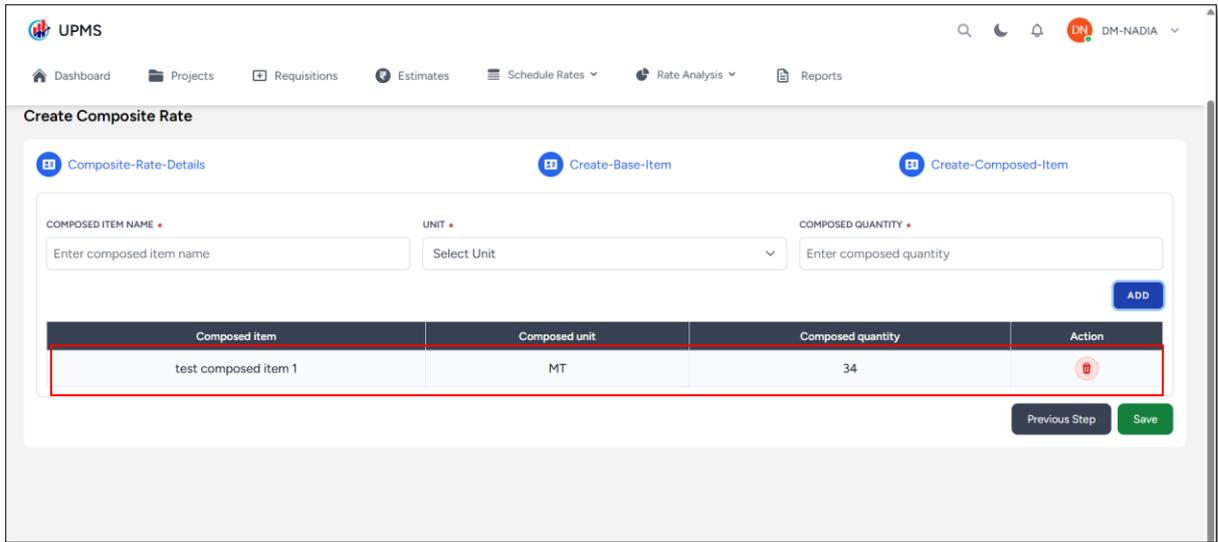
- SCHEDULE RATE**: A dropdown menu with the value 'CHAPTER-10'.
- BASE GROUP**: A dropdown menu with the value '10.05- Maintenance of Bituminous surface road'.
- Description List**: A list of four items, each with a checkbox and a detailed description:
 - 10.05.ii-Patch repair on already filled pot holes with BM with 20 mm premix carpet and seal coat Type B as per drawings and technical specification Clause 1904.2 for Rural Roads of MORD.
 - 10.05.i-Repair to pot holes by removal of failed material, trimming the sides to vertical and leveling the bottom, cleaning the same with compressed air or any appropriate method filled with B.M (thickness not more than 75 mm in single layer) applying bitumen emulsion prime coat at the bottom and bitumen emulsion tack coat on sides and on bottom as per technical specifications Clauses 502 and 503 for Rural Roads of MORD.
 - 10.05.iii-Patch repair on already filled pot holes with BM with 12 mm premix carpet using premixed stone chips of approved quality with hot matrix using 1.00 m3 of 11.2 mm chips and 0.6m3 of 5.6 mm chips per 100 m2 of surface, including preheating the stone chips on suitable pans and intimately mixing the hot chips separately with hot matrix @ 56 kg per m3 of stone chips, laying the mixture uniformly over the surface and rolling with power roller, after hand packing and pinning adequately to ensure a compact surface.
 - 10.05.iv-Patch repair on already filled pot holes with BM with 6 mm premix carpet using premixed stone chips of approved quality with hot matrix using 0.80 m3 of 11.2 mm chips and 0.25m3 of 5.6 mm chips per 100 m2 of surface, including preheating the stone chips on suitable pans and intimately mixing the hot chips separately with hot matrix @ 70 kg per m3 of stone chips, laying the mixture uniformly over the surface and rolling with power roller, after hand packing and pinning adequately to ensure a compact surface.

At the bottom right of the form, there are two buttons: 'Previous Step' and 'Next Step'.

UPMS Version 2.0

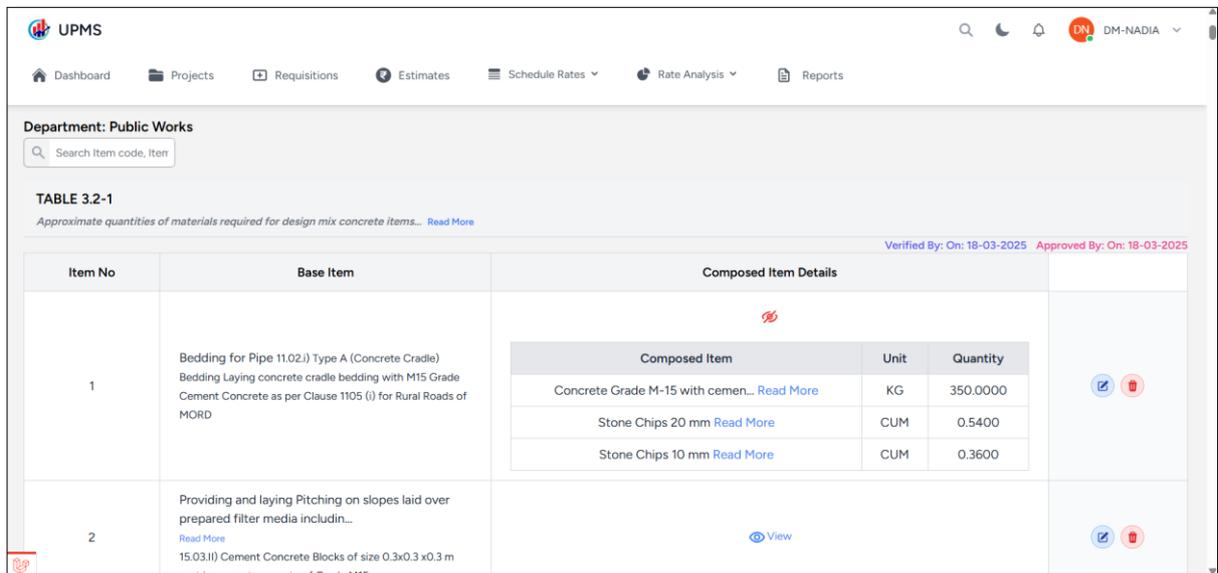
Go to the next step the third step where we have to add the details of composed items as shown below.

Fill the details and click on “add” button, will add the composed item and list below.



After adding up the composed item click on “save” button.

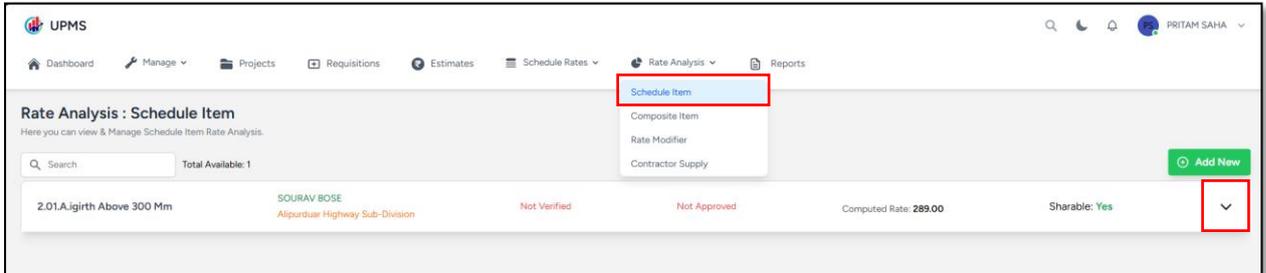
For visual click on view button in “Action” column of composite rate list three dots, will open the table with item list (base item with its composite items).



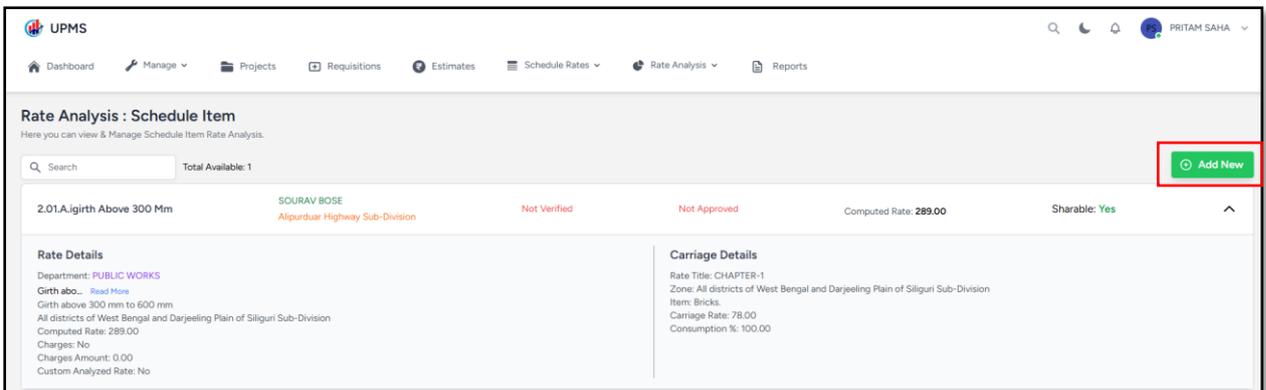
RATE ANALYSIS

In “UPMS” various types of analysis are there. Rate Analysis is just summations of **Schedule Rate + Material Carriage Rate + Transport Cost.**

1. Schedule Item Rate Analysis



- Under “**Rate Analysis**” menu there is an option “**Schedule Item**” click on this option to create or view the list of Schedule Rates which are created by the user or shared by others.
- In list user can see Name of the analysis, Prepared by, Prepared from, Verify & Approve details, Analysed Rate and Sharable status.
- For detail view click on expand button.
- User can download the Rate Analysis.



- Click on “**Add New**” button for creating new rate analysis.
- **Title:**
Enter the title for your rate analysis.
- **Office:**
Select the office where the analysis will be conducted.
- **Description (Optional):**
Provide a brief description of the rate analysis if needed.
- **Department:**
Choose the relevant department for the analysis from the dropdown menu.
- **Schedule Rate Category:**
Select the appropriate category for the schedule rate.

UPMS Version 2.0

- **Prepared At:**
Select or input the date when the document was prepared.
- **Document Type:**
Choose the type of document from a dropdown list.
- **Document:**
Upload or provide a link to the document if applicable.
- Once the user has filled in the required fields, they can click **Save** or **Cancel** to either confirm or close the pop-up.
- After that user can add "Material Carriage" with it. Click on "+" icon button to add material carriage.

Material Carriage Zone Rate

MATERIAL CARRIAGE RATE: CHAPTER-1

MATERIAL CARRIAGE ZONE: All districts of West Bengal and Darjeeling Plain of Siliguri Sub-Division

MATERIAL CARRIAGE ITEM: 1.02 c-Sand, Stone aggregate below 40 mm nominal size

MATERIAL CARRIAGE RATE: 70.00

MATERIAL CARRIAGE RATE CONSUMPTION PERCENT: 75

ANALYZED RATE: 52.5

ADD

- **Material Carriage Rate:**
Choose the applicable material carriage rate from a dropdown menu.
- **Zone:**
Select the relevant zone for the material carriage rate from the dropdown.
- **Item:**
Select the item that the material carriage rate applies to.
- **Consumption Percentage:**
Enter the consumption percentage.

Once the user has filled in the required fields, they can click **Add** or **Cancel** to either confirm or close.

Click on Save Button the system will process the input and display a confirmation message.

Rate Analysis : Schedule Item

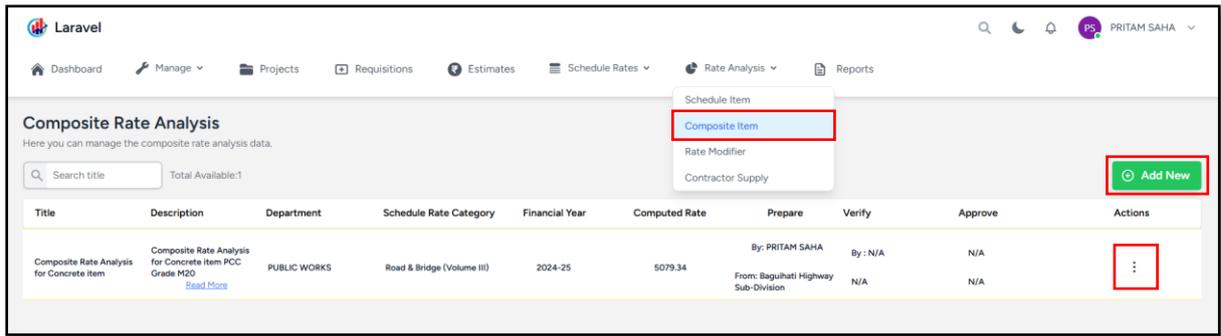
Here you can view & Manage Schedule Item Rate Analysis.

Schedule-Item-Rate-Analysis-Details

Add-Charge-And-Material-carriage-Rate

Item	Unit	Zone	Rate	Action
Base Item: Girth above 300... Read More	EACH	All districts of West Bengal and Darjeeling Plain of Siliguri Sub-Division	<p>Base Rate: 211.00</p> <p>Material Carriage:</p> <ul style="list-style-type: none">• Rate: 52.5• Title: CHAPTER-1• Zone: All districts of West Bengal a... read more...• Item: Sand, Stone aggregate below 40 mm nominal size read more... <p>Computed Rate: ₹ 525</p> <p>No charges added</p> <p>Net Rate: ₹ 525.00</p>	<p>Customize Rate</p> <p>Previous Step</p> <p>Save</p>

2. Composite Rate Analyses



- Under “**Rate Analysis**” menu there is an option “**Composite Item**” click on this option to create or view the list of Composite Rate Analyses which are created by the user or shared by others.
- In list user can see Name of the analysis, Prepared by, Prepared from, Verify & Approve details, Analyzed Rate and Sharable status.
- For detail view click on expand button.
- User can download the Rate Analysis also.
- Click on “**Add New**” button for creating new rate analysis.
- **Title:**
Enter the title for your rate analysis.
- **Department:**
Choose the relevant department for the analysis from the dropdown menu.
- **Schedule Rate Category:**
Select the appropriate category for the schedule rate.
- **Composite Schedule Rate:**
Pick the specific composite schedule rate for the analysis from the dropdown.
- **Base Schedule Item:**
Select the relevant item for the analysis from the available schedule items.
- **Zone:**
Choose the zone related to the analysis from the dropdown menu.
- **Office:**
Select the office where the analysis will be conducted.
- **Description (Optional):**
Provide a brief description of the rate analysis if needed.
- Click on “**Next Step**”

UPMS Version 2.0

Create Composite Rate Analysis

TITLE * Composite Rate Analysis for Concrete Item DEPARTMENT * PUBLIC WORKS

SCHEDULE RATE CATEGORY * Road & Bridge (Volume III) COMPOSITE SCHEDULE RATE * TABLE 3.2-1

COMPOSITE ITEM * 12.05.A - PCC Grade M20 FINANCIAL YEAR * 2024-25

OFFICE * Baguihati Highway Sub-Division

DESCRIPTION

Sans Serif Normal B I U G x₂ x² [Icons] [Icons]

Composite Rate Analysis for Concrete Item PCC Grade M20

NEXT

- After that Base item and the composed items listed.
- For the Base Item, the user only has to choose a zone from the dropdown for analysis.
- For the Composed Item, the user has to choose the schedule rate, schedule item, and zone as well.

Create Composite Rate Analysis

Base Item Details

Item	Unit	Quantity	Zone	Rate	Action
Base Item: 12.05.A - PCC Grade M20	CUM	1	Zone * All districts of West Bengal and C.	Base Rate: 2043.00 Gross Rate: 2,043.00 No charges applied. Computed Rate: 2,043.00	[+]
Composed Item: Stone Chips 20 mm	CUM	0.5400	Zone * Pabna	Base Rate: 302.84 Gross Rate: 302.84 No charges applied. Computed Rate: 302.84	[+]
Composed Item: Stone Chips 10 mm	CUM	0.9600	Zone * Pabna	Base Rate: 154.80 Gross Rate: 154.80 No charges applied. Computed Rate: 154.80	[+]
Composed Item: Concrete Grade M20 with cement type OPC 53 / PSC / PPC	MT	0.4000	Zone * Base Rate(1) (Supplier by Dept)	Base Rate: 6289.00 Gross Rate: 3,295.60 No charges applied. Computed Rate: 3,295.60	[+]

Total Gross Rate: ₹ 5,016.34 **PREVIOUS STEP** **SAVE**

- After Selecting all items and zones user can add “Material Carriage Rate” if needed clicking on “+” icon button from action column.
- Add Material Carriage Rate Pop up will open.
- **Material Carriage Rate:**
Choose the applicable material carriage rate from a dropdown menu.
- **Zone:**
Select the relevant zone for the material carriage rate from the dropdown.
- **Item:**
Select the item that the material carriage rate applies to.

UPMS Version 2.0

- **Consumption Percentage:**
 - **Purpose:** The user needs to specify the portion of the total carriage rate that corresponds to certain tasks, such as **Loading, Unloading, and Stacking**.
 - **Scenario:** If the material carriage rate includes **Loading, Unloading, and Stacking**, but the user only requires the **Loading and Unloading** tasks, they can enter a consumption percentage that reflects the proportion of the overall rate for these tasks.

Once the user has filled in the required fields, they can click **Save** or **Cancel** to either confirm or close.

Add Material Carriage Rate

MATERIAL CARRIAGE RATE *
CHAPTER-1

MATERIAL CARRIAGE ZONE *
All districts of West Bengal and D

MATERIAL CARRIAGE ITEM *
1.02.c - Sand, Stone aggregate be

MATERIAL CARRIAGE RATE *
70.00

MATERIAL CARRIAGE RATE CONSUMPTION PERCENT
75

ANALYZED RATE
52.5

Cancel SAVE

- Adding Material Carriage Rate on Composed Item **"Stone Chip 20 mm"** and **"Stone Chip 10 mm"**.
- **"Total Gross Rate"** is automatically calculated in each and every step.

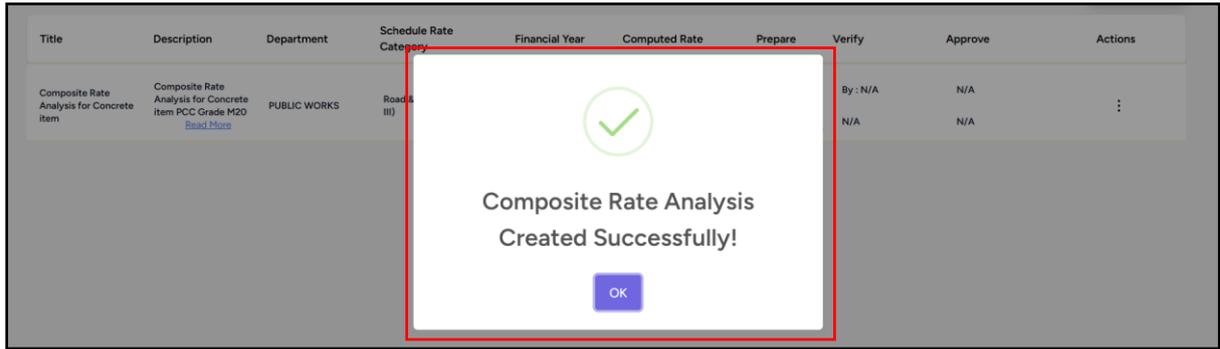
Create Composite Rate Analysis

Item	Unit	Quantity	Zone	Rate	Action
Base Item: 1025.A - PCC Grade PCC	CUM	1	All districts of West Bengal and C	Base Rate: 2043.00 Gross Rate: 2,043.00 No charges applied. Computed Rate: 2,043.00	
Composed Item: Stone Chip 20 mm SCHEDULE RATE: TABLE B1-1 SCHEDULE ITEM: 9 - 20 mm Nominal graded Stone aggregate	CUM	0.5400	Palau	Base Rate: 581.00 Material Carriage: • Rate: 52.5 • Title (CHAPTER): • Zone (All districts of West Bengal and Orissa): • Item: Stone aggregate below 40 mm nominal size: read more. • Unit: CUM Gross Rate: 342.74 No charges applied. Computed Rate: 342.74	
Composed Item: Stone Chip 10 mm SCHEDULE RATE: TABLE B1-1 SCHEDULE ITEM: 10 - 10 mm Nominal graded Stone aggregate	CUM	0.3600	Palau	Base Rate: 431.00 Material Carriage: • Rate: 52.5 • Title (CHAPTER): • Zone (All districts of West Bengal and Orissa): • Item: Stone aggregate below 40 mm nominal size: read more. • Unit: CUM Gross Rate: 185.00 No charges applied. Computed Rate: 185.00	
Composed Item: Concrete Grade 10-20 with cement type OPC 33 / PSC / PPC SCHEDULE RATE: TABLE B1 SCHEDULE ITEM: 1A - PPC / PSC / OPC33	MT	0.4000	Issue Rate(s) Supplied by Dept.	Base Rate: 6289.00 Gross Rate: 2,515.60 No charges applied. Computed Rate: 2,515.60	

Total Gross Rate: ₹ 5,079.34 PREVIOUS STEP SAVE

- Clicking the **"Save"** button if the data is valid, the system will save the analysis.
- After saving, the user should receive a confirmation that the analysis has been saved successfully, such as a message like "Analysis Saved Successfully," or the system could redirect them to a summary page or dashboard with the saved analysis.

UPMS Version 2.0

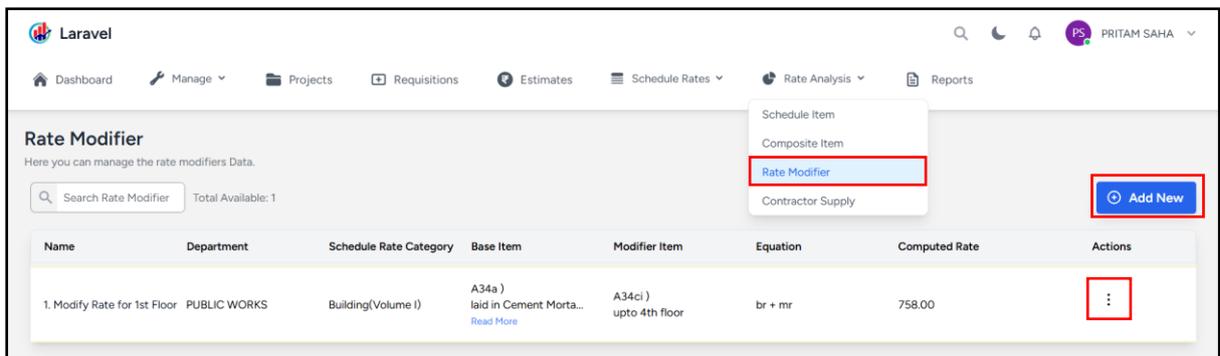


3. Rate Modifier

- A **Rate Modifier** is a scheduled item that is used to adjust or modify an existing rate (such as a **Base Rate** or a **Scheduled Rate**).
- The key point is that a **Rate Modifier** does not occur independently. It always depends on an existing rate either a **Scheduled** or **Base Rate** and alters or adjusts it based on specific rules or conditions.

A screenshot of a table titled "SECTION 1 C" showing a list of items. The table has columns for Sequence No, Item No, Item Name, Unit, and Kolkata / 24. Item A34ci is highlighted with a red box and labeled as "Rate Modifier".

Sequence No	Item No	Item Name	Unit	Kolkata / 24
190	A34a Scheduled	BRICK WORKS 125 mm thick Autoclave aerated concrete block Work... laid in Cement Mortar (1:6) -In Super Structure, G...	sqm	746.00
191	A34b Scheduled	BRICK WORKS 125 mm thick Autoclave aerated concrete block Work... b) laid in 3 mm (av) thick admixed thin layered...	sqm	729.00
192	A34ci Rate Modifier	BRICK WORKS 125 mm thick Autoclave aerated concrete block Work... laid in Cement Mortar (1:6) -In Super Structure, G... upto 4th floor	sqm	12.00



- Under "**Rate Analysis**" menu there is an option "**Rate Modifier**" click on this option to create or view the list of Composite Rate Analyses which are created by the user or shared by others.

UPMS Version 2.0

- In list user can see Name of the Modifier, Prepared by, Prepared from, Verify & Approve details, and Modify Rate and Sharable status.
- For detail view click on expand button.
- Click on “**Add New**” button for creating new Rate Modifier.

Create New Rate Modifier

With Items With Modifier

NAME * OFFICE *

DEPARTMENT * SCHEDULE RATE CATEGORY * SCHEDULE RATES *

GROUPS ITEMS * ZONES *

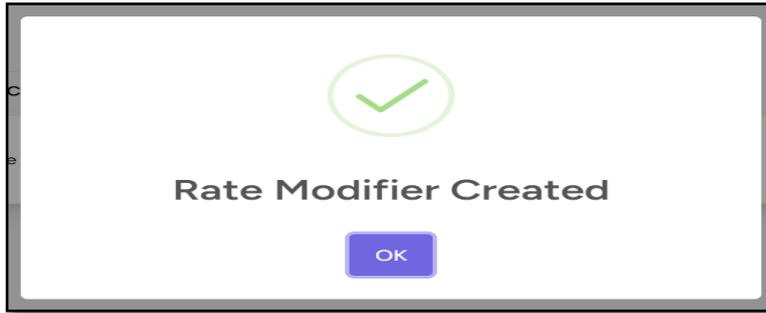
BASE RATE MODIFIER ITEMS * MODIFIER RATE

EQUATION * PREVIEW CALCULATE COMPUTED RATE

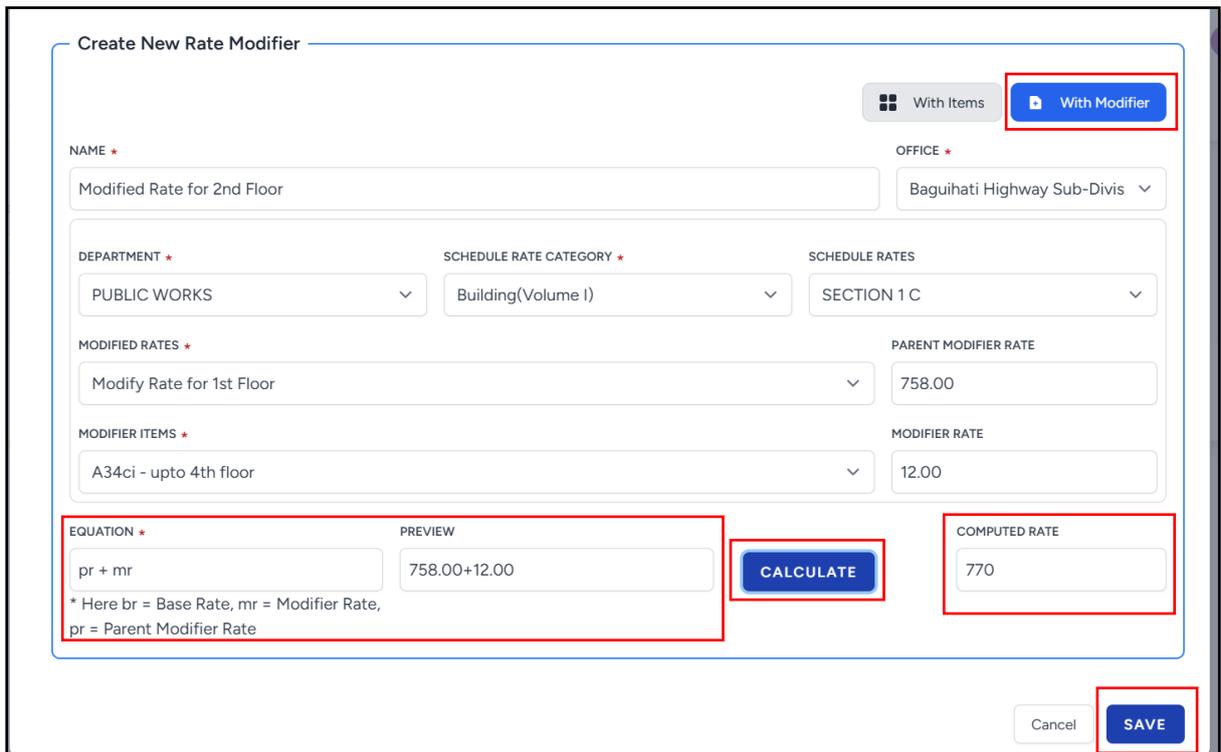
* Here br = Base Rate, mr = Modifier Rate,
pr = Parent Modifier Rate

Cancel SAVE

- **Name of the Rate Modifier** The user needs to provide a unique name or description for the **Rate Modifier**. This will help identify the modifier later when it's applied to a **Base Rate** or **Scheduled Rate**.
- The user selects the **office**.
- The user selects the **department**.
- The user selects the **rate category** associated with the **Rate Modifier**
- The user selects an existing **Schedule Rate**.
- The user selects an existing **Schedule Item** and **Zone** to which the **Rate Modifier** will be applied. This rate represents the base price before the modifier is applied.
- Then the user have to choose Rate Modifier item and click on “**Calculate**” for preview the Modified Rate.
- Click on “**Save**” to save the rate modifier.



- Here we have another option that is “With Modifier”. That means user already Modified a rate now using that modified rate make a new modified rate.



The screenshot shows the 'Create New Rate Modifier' form with the following details:

- Buttons:** 'With Items' and 'With Modifier' (highlighted with a red box).
- NAME:** Modified Rate for 2nd Floor
- OFFICE:** Baguihati Highway Sub-Divis
- DEPARTMENT:** PUBLIC WORKS
- SCHEDULE RATE CATEGORY:** Building(Volume I)
- SCHEDULE RATES:** SECTION 1 C
- MODIFIED RATES:** Modify Rate for 1st Floor
- PARENT MODIFIER RATE:** 758.00
- MODIFIER ITEMS:** A34ci - upto 4th floor
- MODIFIER RATE:** 12.00
- EQUATION:** pr + mr
- PREVIEW:** 758.00+12.00
- COMPUTED RATE:** 770
- Buttons:** 'CALCULATE' (highlighted with a red box), 'Cancel', and 'SAVE' (highlighted with a red box).
- Footnote:** * Here br = Base Rate, mr = Modifier Rate, pr = Parent Modifier Rate

- User have to put Modifier **Name**.
- Select **Office**.
- Select the previously analyzed **Modified Rate**.
- And Select **Modifier Item**.
- Then the user have to choose Rate Modifier item and click on “**Calculate**” for preview the Modified Rate.
- Click on “**Save**” to save the rate modifier.