

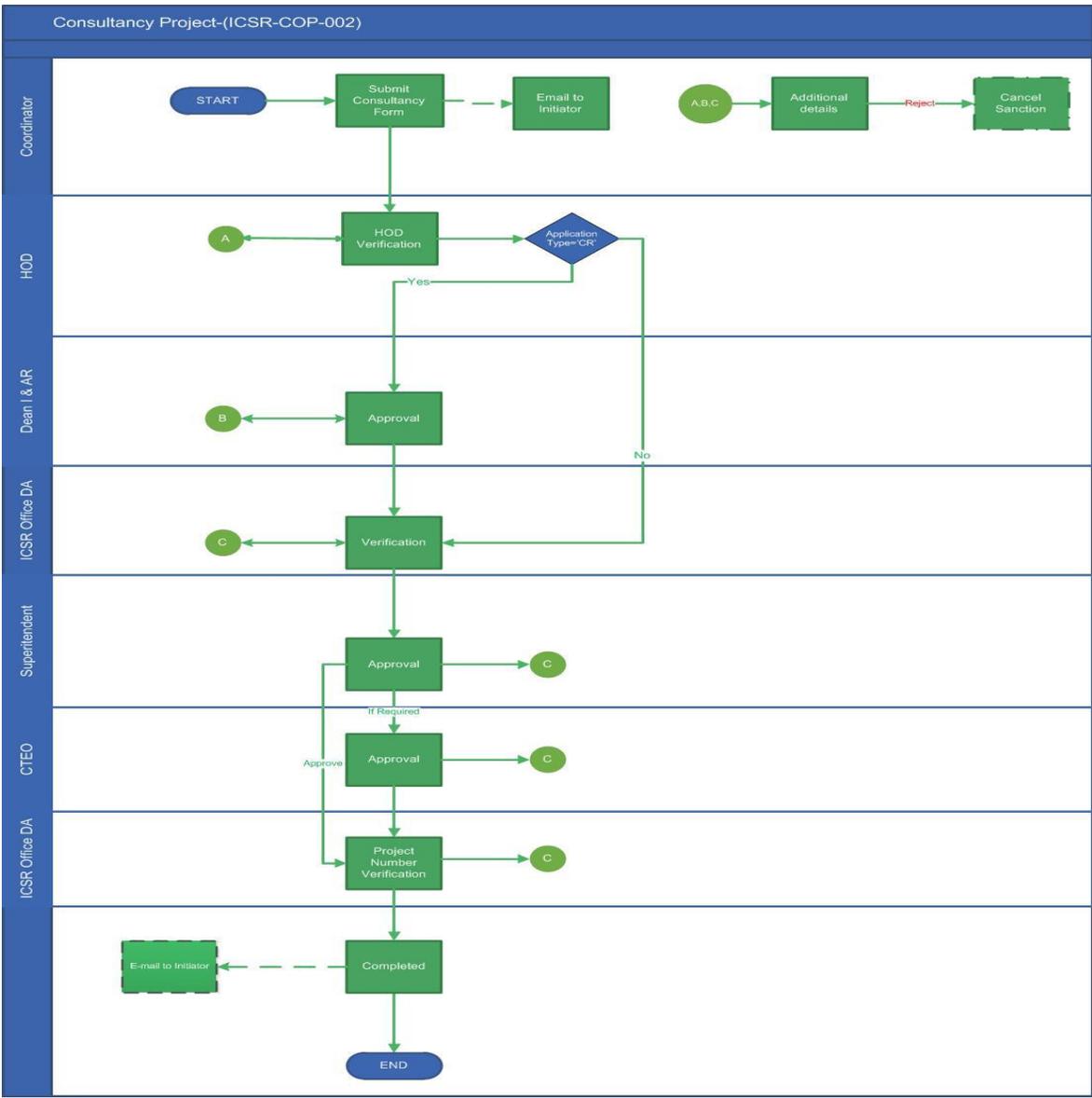
# CONSULTANCY APPLICATION

## OVERVIEW

### 1.1 Scope

This process describes the procedure involved by the faculty to submit the Consultancy Application

### 1.2 Process Flow



**User Roles:**

<b>Employee</b>	<b>Role</b>
Coordinator	Submits the consultancy application
HOD	Verifies the application details
Dean I and AR	Verify and approve the project
ICSR office DA	Project number creation
ICSR Superintendent	Project registered and approved
ICSR office DA	Project details verification

**2.2.1 Process Description****2.2.1.1 Key Information Captured**

The following are the Key Fields in this process.

1. Application Type
2. Project Title
3. Name of the Agency
4. Currency
5. Service Tax
6. Final Project Value

**2.2.1.2 Functional Specifications**

1. When the user invokes the Consultancy application page, the system generates the 'Consultancy application Details' screen.

- This screen enables the Faculties, ICSR Office Dealing Assistant and Friends Of Workflow to create the New Consultancy Project in ICSR Module.
- The 'Name of the Agency' dropdown field allows the user to select the existing agency name or enter a new agency by selecting other option.
- Service Tax is calculated 14% on project value in INR.

## 2.2.1.3 User Interface Design

## Step 1: Coordinator

Login workflow at: <https://workflow.iitm.ac.in/employee/> using ADS username and Password.

In order to create New Consultancy Project, go to ICSR → Proposal → New Consultancy Project as shown below.

The screenshot displays the IIT Madras workflow system interface. The top navigation bar includes the IIT Madras logo and the text 'IIT Madras'. Below this, a dark blue navigation menu contains the following items: Tasks, Views, Academics, ICSR, Human Resources, Main Stores, Main Accounts, Memberships, General, and Task Status. The 'ICSR' menu is expanded, showing a list of options: Proposal, Travel, Temporary Advance, Imprest, Claims, Recruitment, Request OverDraft, Distribution of Funds, Reports, Tickets, ICSR Project Indent, and Project Closure. The 'Proposal' option is highlighted in blue, and a sub-menu is visible, showing 'New Consultancy Project' as the selected option. Below the navigation menu, the 'Inbox' section is visible, displaying a table of tasks. The table has columns for checkboxes, status indicators, and task names. The tasks listed are: Faculty Working During Vacation\_24866, Progress Report Upload\_9171, Progress Report Upload\_7967, Student Leave Application\_3539, and Student Leave Application\_3415.

Inbox		TASK NAME
<input type="checkbox"/>		
<input type="checkbox"/>	✓	2017-2018
<input type="checkbox"/>	✓	HS14D01
<input type="checkbox"/>	✓	HS13D02
<input type="checkbox"/>	✓	HS13D02
<input type="checkbox"/>	✓	HS14D01
		Faculty Working During Vacation_24866
		Progress Report Upload_9171
		Progress Report Upload_7967
		Student Leave Application_3539
		Student Leave Application_3415

- New Consultancy Project application screen opens.
- This screen consists of four sections such as:
  - a) Project Details,
  - b) Co – Investigator Details,
  - c) Documents From Funding Agency,
  - d) Recommended Actions.

## Project Details

**Project Details**

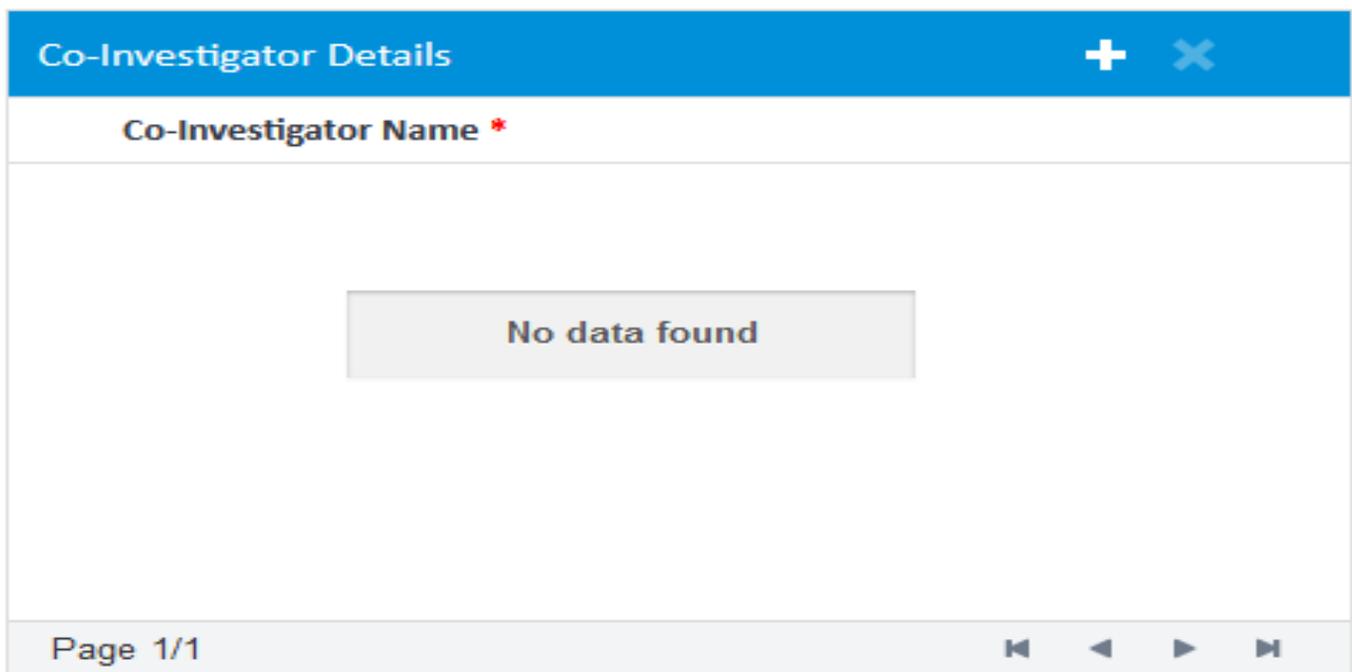
Application Type *	Financial Year	Project Title *	Scope of work *
<input type="text" value="-Select-"/>	<input type="text" value="2019-2020"/>	<input type="text" value="Max 250 Chars"/>	<input type="text" value="Max 500 Chars"/>
Name of the Client/Agency/Company	Agency Code		
<input type="text" value="-Select-"/>	<input type="text"/>		
GSTIN *	PAN *	TAN *	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Name of the Representative	Registered Address	Address 2	City
<input type="text"/>	<input type="text" value="Max 100 Chars"/>	<input type="text" value="Max 100 Chars"/>	<input type="text"/>
Pincode	Phone Number		Fax No
<input type="text"/>	<input type="text"/>		<input type="text"/>
Exchange Rate	Email Id	Currency *	
<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="INR"/>	
Amount In Foreign Currency	Project Value in INR *	Starting Date *	Closing Date *
<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>
Total Days	Project Duration in Months	GST Included *	
<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="-Select-"/>	
Final Project Value (Inc. Tax)		Co-Investigator Required *	
<input type="text" value="0"/>		<input type="text" value="-Select-"/>	

In Project Details section,

- Financial Year will be auto-filled.
- Select Application Type from the drop down. Enter Project Title and Scope of work.
- Select the existing Name of the Client/Agency/Company from the drop down based on which Agency code will be auto filled or Enter New Client/Agency/Company name by selecting 'Other' option. For new Agencies, ICSR will create the Agency Code.
- Fill in the Client/Agency/Company details like GSTIN, PAN, TAN, Name of the Representative, Registered Address, Address 2, City, Pincode, Phone Number, Fax No, and Email Id.

- Select the Currency Type from the drop down.
- Enter 'Project Value in INR' If Currency Type is INR else provide Exchange Rate and Amount in Foreign Currency based on which 'Project Value in INR' will be auto filled.
- Select Starting Date and Closing Date of the project from the date picker, Total days and Project Duration in Months will be auto filled.
- Select 'GST Included' from the drop down, if 'Yes' Final Project Value (Inc. Tax) will be auto filled else enter the value including GST. In addition to that, one more option named 'Not Applicable' will be available under 'GST Included' drop down, if 'Application Type' is chosen as Corporate Social Research - CR.
- Select 'Co- Investigator Required' from the drop down, if 'Yes' then Co - Investigator name can be added under Co - Investigator Details section.

## CO – Investigator Details



Co-Investigator Details

Co-Investigator Name \*

No data found

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- Click on '+' icon to add a row.
- Select 'Co – Investigator Name' from the drop down.

## Documents From Funding Agency

Supportive Document upload is mandatory for new Non "AAAA" projects  
Document could be : Work Order/Agency Concurrence/JDA/NDA/MOU/Email Concurrence

Documents From Funding Agency		
Document *	Name *	Description
No data found		

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- Attach the Necessary documents as mentioned above "Documents From Funding Agency" section by clicking on the '+' icon.
- Browse and Upload the document, enter the Name of the Document and Description.

## Recommended Actions

Recommended Actions

Remarks

- Enter Remarks if necessary. Click submit.
- The task will be forwarded to HOD for verification.

## Step 2: HOD

The initiated task from Coordinator will be available in HOD's inbox.

Consultancy Application - HOD Verification

Project Agreement HelpDoc FlowChar

Guidelines

Recommended Actions

Forward to ICSR  Return Back to PI

Remarks \* Max 500 Chars

Remarks Summary

Apply Consultancy Project 07-02-2020 09:58:15

Initiated

- HOD can perform one of the two actions “Forward to ICSR” on approval or “Return Back to PI” to route the process back to coordinator as additional details.
- All the information will remain un-editable.
- Once the task is verified and submitted, it will be forwarded to DEAN I & AR if the application type is ‘CR’ else to ICSR Office DA for approval.

## Step 3: DEAN I & AR

If the Application type is CR, then consultancy task will be available in Dean I and AR's Inbox.

Consultancy Application - Dean I and AR Approval

ProjectAgreement HelpDoc FlowChat

Guidelines

Recommended Actions

Forward to ICSR  Return Back to PI

Remarks \* Max 500 Chars

Remarks Summary

HOD Verification	07-02-2020 12:23:15
ok	
Apply Consultancy Project	07-02-2020 12:21:00
Initiated	

- DEAN I & AR can perform one of the two actions “Forward to ICSR” on approval or “Return Back to PI” to route the process back to coordinator as additional details.
- Once the task is approved and submitted, it will be forwarded to ICSR Office DA for approval.

## Step 4: ICSR OFFICE DA

The task from **Dean I and AR for Application type is CR** and HOD for other application types will be available in ICSR Office DA's Inbox.

The screenshot shows a web application interface for 'Consultancy Application - Project Number Creation'. At the top right, there are three buttons: 'ProjectAgreement', 'HelpDoc', and 'FlowC'. Below the header is a 'Recommended Actions' section. It contains two checkboxes: 'Create Project Number' and 'Return Back to PI'. Below these is a 'Remarks' field with a 'Max 500 Chars' limit. A 'Remarks Summary' section follows, listing three items: 'Dean I and AR Verification' (status: ok, timestamp: 07-02-2020 12:27:50), 'HOD Verification' (status: ok, timestamp: 07-02-2020 12:23:15), and 'Apply Consultancy Project' (status: Initiated, timestamp: 07-02-2020 12:21:00).

- ICSR Office DA can either check the “Create Project Number” on approval or “Return Back to PI” to route the process back to coordinator as additional details.
- **Agency details** can be verified and modified by ICSR Office DA if necessary.
- Enter Remarks. Click submit.
- The task will be forwarded to Superintendent for approval.

## Step 5: SUPERINTENDENT

The task from ICSR Office DA will be available in Superintendent's inbox.

The screenshot displays the 'Consultancy Application - Project Registered' interface. At the top right, there are three tabs: 'ProjectAgreement', 'HelpDoc', and 'FlowC'. Below the tabs, there are three checkboxes: 'Approve' (unchecked), 'CTEO Approval Required' (unchecked), and 'Return Back to PI' (unchecked). A 'Remarks \*' field is present with a 'Max 500 Chars' limit. Below this is a 'Remarks Summary' section with a scrollable list of tasks:

Task Name	Status	Timestamp
Project Number Creation	Done	10-02-2020 17:54:57
Dean I and AR Verification	ok	07-02-2020 12:27:50
HOD Verification	ok	07-02-2020 12:23:15
Apply Consultancy Project	Initiated	07-02-2020 12:21:00

- Superintendent can perform either of the actions “Approve” or “CTEO Approval Required” or “Return Back to PI”
- On rejection by clicking “Return Back to PI” checkbox, the task is routed back to coordinator as additional details.
- If required the task can be forwarded to CTEO for approval by clicking on “CTEO Approval Required” checkbox.
- On approval the task will be forwarded to ICSR Office DA for Project Number Verification.

## Step 5: CTEO

The task from Superintendent will be available in CTEO's inbox.

Consultancy Application - CTEO Approval

ProjectAgreement HelpDoc Flow

Recommended Actions

Approve  Return Back to PI

Remarks \* Max 500 Chars

Remarks Summary

- Superintendent Verification ok 10-02-2020 18:02:08
- Project Number Creation Done 10-02-2020 17:54:57
- Dean I and AR Verification ok 07-02-2020 12:27:50
- HOD Verification ok 07-02-2020 12:23:15

- CTEO can either check the “Approve” checkbox on approval or “Return Back to PI” to route the process back to coordinator as additional details.
- Enter Remarks. Click submit.
- On approval the task will be forwarded to ICSR Office DA for Project Number Verification.

## Step 6: ICSR OFFICE DA

The task from Superintendent and CTEO will be available in ICSR Office DA's Inbox.

Task Name	Status	Timestamp
CTEO Approval	ok	11-02-2020 09:44:05
Superintendent Verification	ok	10-02-2020 18:02:08
Project Number Creation	Done	10-02-2020 17:54:57
Dean I and AR Verification	ok	07-02-2020 12:27:50
HOD Verification	ok	07-02-2020 12:23:15
Apply Consultancy Project	Initiated	07-02-2020 12:21:00

- ICSR Office DA can “Approve” the task on Project Verification.
- Enter Remarks. Click submit.
- After the task gets completed, the status can be checked by
  - a) Coordinator in Task Status→Task Summary as Initiated→Completed.
  - b) HOD, DEAN I & AR, ICSR Office DA, Superintendent, CTEO in Task Status→Task Summary as Processed→Completed.
- Clicking on the Task Id will display the details of the task.

### 2.3 Dependencies with other Processes

-Nil -