

## Evaluation Checklist for Project and Portfolio Management Solution (PPM)

### Functional Evaluation Checklist:

Bidders need to provide input against each feature by mentioning it as Available, Workaround, Customisation or Not Available.

Description	Features	Bidder's input
Program Management	Capability of managing interrelated projects and streamline program level activities, Cross project dependencies and Track progress	
	Collaborate with team to manage project/ program level risk and issues	
Agile Methodology	Feature to create, manage and track projects using Agile Methodology.	
	Sprint or Kanban Sheet/ Board for managing epics, user stories, and tasks.	
	Planning board for managing and planning releases and Sprints.	
	Sprint velocity, Release velocity and other agile related metrics.	
Waterfall Methodology	Feature to create, manage and track projects using Waterfall Methodology.	
	Capability to create work breakdown structure, add dependencies and assign resources to manage work and track progress.	
	Track Milestones, Issues, Risks, Defects, and Change Requests	
	Availability of metrics such as Schedule and Effort metrics, Planned vs Actuals Metrics, Earned Value Management	
	Capability to configure and generate status reports	
	Provision for project template creation, notifications and escalations generation, audit trail and integration capabilities	
Time Reporting	Timesheets to allow team members to track time against project and non-project activities and it should also support workflow approval.	
	Multiple dashboard and reporting view on resource allocations	
Issues & Risk Management	High level risk assessment as well as detailed risk registry.	
	Capability to highlight issues and risks at the portfolio, program and project level and should be able to track mitigation, contingency and action plans.	
	Quantitative risk management feature	
Planning, Budgeting and Forecasting	Provision to undertake Top - Down and Bottom - Up IT budgeting exercise as per the frequency decided by ReBIT	
	Ability to allow user to enter budget or forecast performance data under IT-CAPEX (Capital Expenses) and IT-OPEX (Operating Expenses) categories	

	Provision to transfer budgets between heads/subheads and also between departments (as per rules approved by appropriate authority)	
	System should not allow any sanctions without availability of IT Budget and any payments without approved sanctions	
Demand Management	Framework to capture, classify, evaluate, and resolve all sources of demand	
	Provision to Classify demand as Idea for a new product, service, or strategic initiative	
SLA Management	The framework to develop and automate business processes based on requirements	
	Configurable SLA framework with the ability to define SLA metrics and map them to workflows and set the goal values is supported	
Vendor Management	Capability of capturing vendor details at organisation and project level	
	Capability to assign tasks and projects with vendor, track vendor performance with required metrics, tracking of vendor related Issues, risks, action plans and escalations	
Business Intelligence & Reporting	Out of box and customizable Reports and Dashboards to provide visibility and decision support to proactively manage projects, programs, and portfolios	
	Capability to integrate with other third-party BI tools	
Quality Management	The Proposed system should able to define Quality Metrics at project level and provide facility to manage projects in Metrics Based Management way.	
	Capabilities to Monitor Project wise KPI against multiple metrics, enable enterprise wise standardize reporting that helps to analyse project performance	
	Capability to configure KPI related performance metrics	
Financial Management	Capturing of financial details at Project level	
	Configuration and generation of Planned vs Actuals financial reports from the system and publishing of same to various levels with proper access, roll-up and drill down capability	
Resource Management	Capable to maintain resource details along with their skills and costs,	
	Provision to allocate resources to projects based on parameters such as roles, skills, strategy and availability, capability to generate resource utilization and resource loading reports	
Schedule Management	Creating detailed level program or project plans	
	Define the interdependencies within and across projects	
	Effort estimation and assign named resources or skill based resources	
Email Reporting, automatic alerts and reminders	Capacity to configure email ids of users in the system and trigger reports or notifications as per the business rules defined. The contents of the notifications should be configurable as well	
	Notifications based on assignments or task for upcoming task, delayed/ overdue assignment, task submission, approvals or pending reviews	
Idea Management	Should have idea management framework which includes features such as idea submission, rating, assessments, discussions, prioritization, evaluation and promoting ideas as proposals	

Other Features	Custom workflow based, according to the ReBIT defined hierarchy for dataflow	
	Need based user access and user management module	
	Scalable as per future changes/requirements	
	Provision to add and modify departments, projects, services and related details (configurable templates) for IT budget planning, forecasting and chargeback purposes	
	KPI driven Dashboards with graphical MIS & reports (monthly/quarterly/annual) as per the ReBIT's requirements, which can be accessed and downloaded in various formats (word, excel, pdf, web browser) and mobile /iPad compatible	
	Ability to do slice and dice, drag and drop to analyse the data	
	Periodical forecasting, by examining historical data and should be updated regularly with change in parameters or operations	
	Provision to calculate the ROI of any IT Project/investment, with minimal manual inputs	
	Alerts, Customized notifications to the stakeholders and integration with outlook	

**Technical Evaluation Checklist:**

Bidders need to provide input against each feature by mentioning it as Yes or No.

Description	Requirements	Bidder's Input
Version of Code	The solution should have been written in latest version of language.	
Secured authentication	The solution should have secured authentication feature for login the application	
VAPT	The solution should be VA-PT tested	
Administrator based permissions	The solution should provide the facility for Admin to decide the user level access for features and files	
Encryption and secure transmission of data	The solution should have proper encrypted and secured transmission of data and information	
Device	The solution should be device agnostic	
Browser	The solution should support compatible with different Browsers	
Windows 8.1/Windows 10	The solution should support the platform -Windows 10/8.1	

Along with these dully filled in checklists, the Bidder needs to submit a high level Project Plan with appropriate milestones and Logical Architecture of the solution being proposed.