

Description of Services for Support and Maintenance of the CRM of eSamurdhi System

1. Introduction;

As a national policy government has identified that, key citizen services to be integrated through integrated development projects under Digitization of government national program. The Digitization program for the Government of Sri Lanka (GoSL) recognized the critical role that ICT can play in fostering social integration, peace, growth, and poverty reduction. The Government intends to use ICT to improve the reach and responsiveness of public services, reduce transaction costs to business, make government more transparent and accountable, and address the urgent needs of poor communities and isolated regions.

Sri Lanka has been providing social welfare to its citizens since the independence. The Sri Lankan government has implemented various welfare programs from time to time to alleviate poverty. The Samurdhi Program became the main social welfare program since 1994. There are 1.8 million Sri Lankan citizens who are directly benefited from this program. Currently Department of Divineguma Development is the implementing organization of the Samurdhi program.

2. Background;

Department of Divineguma Development (DDD) is comprised of ten functional divisions and units. Many different activities are carried out by those divisions and units at different levels. i.e. National level, District level, Divisional Secretariat level, Zonal Level and Grama Niladhari Wasam level. The following diagram illustrates the organization structure and information flow of the DDD.

Currently Department of Divineguma Development working on beneficiary information management and Client Relationship Management (CRM), Program and Project Management (PPM) and Human Resource Management (HRM) modules.

A. Beneficiary information management and Client Relationship Management (CRM)

- To capture and maintain beneficiary information
- To share beneficiary information with all the divisions of the DDD
- To maintain all communication related tasks
- To increase the efficiency and effectiveness of client relationship activities

B. Information portal (INP)

- To provide Public Services
- To publish the information for public user authentication

3. Objectives;

Divineguma Development Department intends to engage a firm software developer for a period of 3 months to provide support and maintenance work for INP and CRM module of the eSamurdhi solution.

4. Scope of Work;

1. The main purpose of this assignment is to support and maintain the Client Relationship Management (CRM), Information Portal (INP) module and integration of other modules.
2. Review and understand the overall architecture and design of the e-Samurdhi initiative.
3. Review and understand functional/ technical aspects of the INP and CRM module.
4. Review and understand the overall functionalities of the eSamurdhi system.
5. Maintain and troubleshoot the eSamurdhi system which has been hosted in Lanka Government Cloud (LGC).
6. Maintain and troubleshoot all relevant back end services, other utilities and respective web services that are required for running the CRM and INP modules.
7. List of changes that have been identified currently are listed below. The Consultant is responsible to complete all change requests which belongs to the functionality of the existing eSamurdhi system not limited to the below list.
 - New/changed validation rules in forms
 - Reporting module which contains reports of CRM profiles
 - Adding, Modifying and Editing functionalities of the CRM and INP modules
8. Attend and resolve issues which may arise during the support and maintenance phase in accordance with the Service Level Agreement (SLA).
9. Provide effort estimations and accept requests for changes (CRs) for the existing functions of the INP and CRM modules.
10. The Software Developer should ensure adherence to the Service Level Agreement (SLA) indicated in Annex 3. The **Support Level applicable** to this project is “**Medium**”.
11. Attending any configuration changes related to certain parameters proposed for the system.
12. Participate for Project Review Committee meeting and Project Implementation Committee (PIC) Meetings as a member.
13. Monitor System live operation and keep the system up and running.
14. Software Upgrades – Upgrading the software installed on the server
15. Carryout minor changes, such as changes to the resource files/ configurations.
16. Ensure efficient support for the eSamurdhi first level Help Desk.
17. Adhere to Government Operational practices.
18. Refer attached User Manual and Administration Manual for the related functionalities.
19. Provide software design/development and testing expertise for possible extensions and improvements for the system. Consultant is supposed to make available at least one Software Engineer who is well versed in the system and capable of design/development activities to engage in these additional developments to the system.
20. Provide support for taking necessary data and system backups.
21. Adhere to ICTA project Management practices.

Annex 1 – Functions of the INP and CRM module
 Annex 2 – Support Process (High-Level Overview)
 Annex 3 – Service Level Agreement for Support and Maintenance Services
 Annex 4 –CRM Architecture Document of the eSamurdhi System.

5. Deliverables and time line;

No	Deliverables	Duration	Deliverables Submission	Payment
5.1	Successful acceptance of the following; Monthly Support and Maintenance report.	3 months	Effective date + Monthly for 3 Months	1/3 of the contract price will be paid

6. Qualifications of the Key Professional Staff;

The Consultancy firm will be engaged for a period of **3 months**.
 Preferable Qualifications;

Key Professional Staff	Academic	Experience in the <u>Proposed Role</u>	Experience in working in CRM/ SOA / web services / integration projects	Experience in portlet technologies
Senior Support Engineer (Technical)	B. Sc or equivalent	2 years	1 year	1 project
Project Manager	B. Sc or equivalent	3 years	-	-

7. Services and Facilities Provided by ICTA;

1. System Requirement Specification (SRS) documents of eSamurdhi System.
2. Technical Documents of eSamurdhi System.
3. Web-based access to the ICTA Software Configuration Management (SCM) system
4. Access to staging/ production servers.
5. Issue Tracking System/ Project Technical Audit dashboard.

8. Review Committees and Review Procedures;

All deliverables will be reviewed by the team appointed by ICTA

Annex 1

Functions of the INP and CRM module

Information portal (INP)

The end user should see the complete set of applications as a unified 'portal'. This can be achieved by:

- Creating a similar look and feel across all applications.
- Sharing identity management across all the applications.
- Sharing session management across all the applications.

Therefore, this is the user interface layer of the eSamurdhi solution where different types of users interact with.

This layer should consist of data capturing interfaces as well as reporting interfaces of different applications. This layer should provide identity management and 'Single Sign On' (SSO) functionality to eSamurdhi solution.

The information portal should cut across the entire Business Applications layer and should interact with the integration layer in relation to sharing identity management and 'Single Sign On' (SSO) requirement to other group of functional modules. Each application in the Business Functions Layer should use identity management system of the Information Portal through Integration Layer.

Functionalities

- User Access Profile
 - The actors will be able to create a userid and password based on which they can login to the Information Portal and can access the portlets based on their roles.
 - The actors will be able to access portlets based on their roles. The actor clicks on a Module image, then the module opens with static data and actor can access the HRM, CRM and PPM modules.
- Announcements Profile
- Application Links Profile
- Product Information Profile
 - Users will be able to view Samurdhi products based on categories and types and also on beneficiaries.
- Wikis Profile
 - This functionality can enable the actor (beneficiary) to share the knowledge / information with other actors/ beneficiary.
- Beneficiary Complain Profile
 - Actors will be able to convey their relevant grievances logging a complaint in the portal.

Client Relationship Management (CRM)

Functionalities

1. Grama Niladari Division (GND) Profile

This profile handling the Village information which updated by users. The actor is prompted to fill up the following details

- Basic information : - Name, District, Samurdhi Zone Name, Divisional Secretariat, etc.
- Population Details : - Total population, Religion, age group.
- Public Places :- Schools, Religious places, Health Centers etc
- Geographical conditions :- River, Tanks, land Use, Forest, Physical situation, etc.
- Road and Public transport facilities :- A, B, C grade roads, buses, trains etc.
- Houses :- Types, Electricity, Toilet facilities etc. (Permanent, Temporary, slums, etc)
- Threats available to the village :- Landslides, floods, drought etc.
- Others (To be included as and when required)

2. Beneficiary Profile

The actors (primarily SDOs) will be able to create a beneficiary profile through this module. There will be two options to create a beneficiary profile

- Create from existing beneficiary data
- Create a new low income earner profile

This module include the following Details of the beneficiary.

- Basic information, Family Details, Home Situation, Drinking water, Toilet Facilities, Animal Husbandry and Fishing, Agricultural Cultivation, Home Appliances, Vehicles, Product Information, Monthly Food Consumption, Subsidiary from Government, Loans Still Paying
- Beneficiary data collection and Survey
- Details and reports may need to be added or changed as and when required

3. Task Profile

4. Potential Projects Profile

The actor will be able to create a case for potential beneficiary registration. CSA will receive any request to create the potential project from customer through multiple sources like sms/phone/email. CSA will collect the following information from requestor

- District, GN division, Customer Name , Address, Email / phone, National Id No. (Mandatory), Subject and Description
- Details and reports may need to be added or changed as and when required

5. Complain Profile

This profile handling Complaints/Grievances. The actor will receive complaints / grievances from different beneficiaries through multiple sources such as email / SMS / phone call.

following are the fields which this module included

- Complain Subject, Complain No, Nature of Complaint, Associated Beneficiary, Assigned Department, Customer Name, Email, Address, Complain Body and Status
- Details and reports may need to be added or changed as and when required

This service inserts the complain details into CRM database. After the complain is registered in CRM database it undergoes a workflow defined for the same in CRM.

6. Mahasangam Profile

This is the basic information of the Mahasangam. The fields to be filled are :

- DS Division, Creator Officer and Bank Societies to be attached with this Mahasangam
- Details and reports may need to be added or changed as and when required

7. Enquiry Profile

This profile handled the Customer enquiries on Products. Various customers will visit the portal (INP); view a list of products made by the beneficiaries (self-employed). The customers will call up/send email / SMS to the CSA to enquire about a product.

Following are the Enquirey profile modules;

- Enquiry Subject, Product Category, Product Name, Beneficiary Id, Name of Requester, Telephone, Address, Email, Resolution, Enquiry Body, Generate Task
- Details and reports may need to be added or changed as and when required

8. Bank Society Profile

The fields to be filled are :

- Divisional Secretariat Area. This should be automatically selected which is the divisional Secretariat the Zonal Manager belongs to.
- Divineguma (Samurdhi) Societies associated with this Bank Society.
- Display beneficiary count of each Samurdhi society.
- Display total beneficiary count of members of bank society
- Total beneficiary Count to be displayed in an auto-populated mode
- Details and reports may need to be added or changed as and when required

9. Divineguma (Samurdhi) Society Profile

The fields to be filled are :

- GN Division to which the SDO is assigned (auto-populate)
- Samurdhi society Bank account number (Some Samurdhi societies can have Bank accounts) (Optional field).
- Beneficiaries who will not belong to any Small group (not having Small group account number and personal account).
- Associated Small group account number and member count of the small group.
- The total member count of Samurdhi Society.
- The creating officer name
- Details and reports may need to be added or changed as and when required

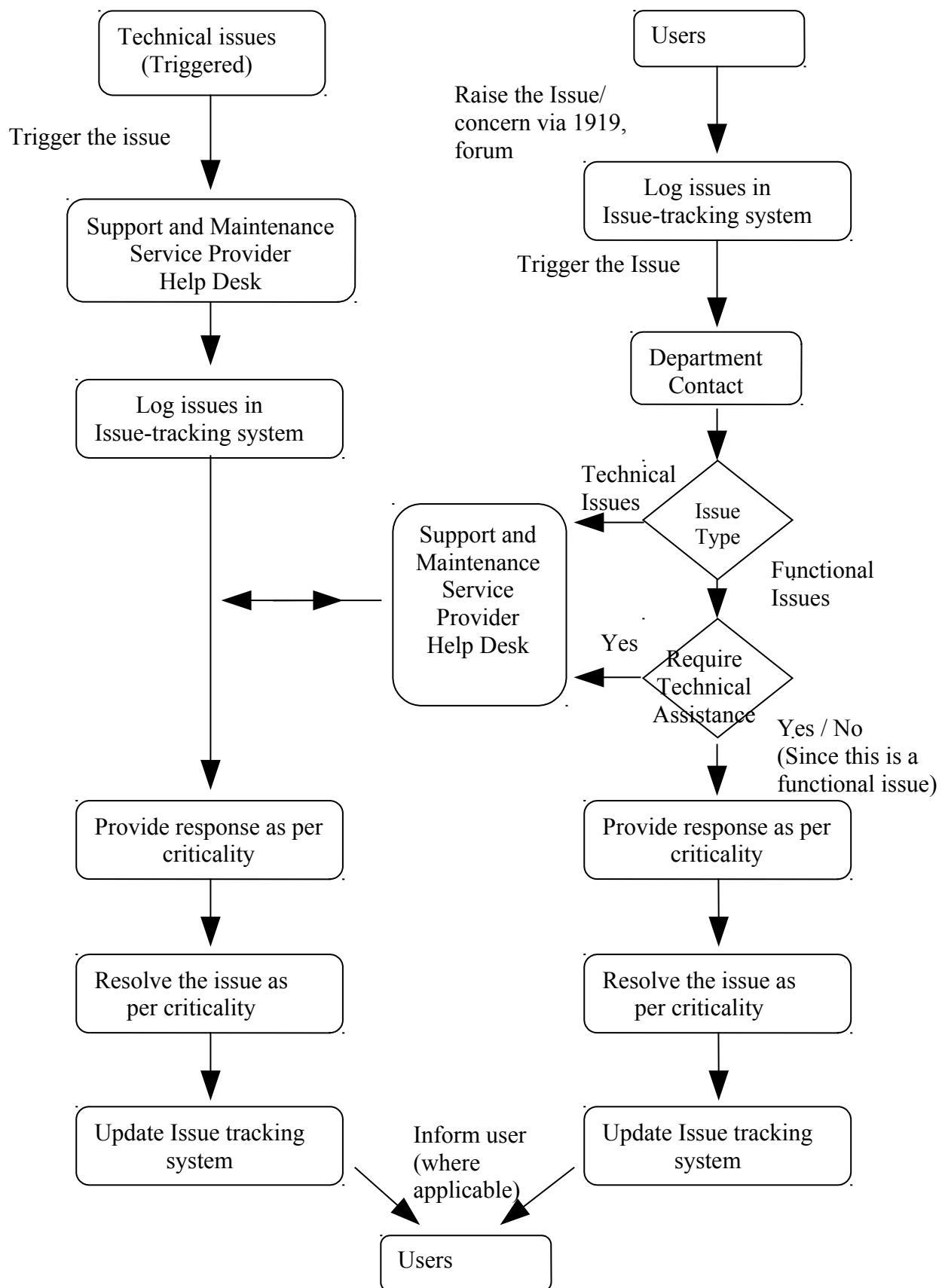
10. Small Group Profile

Only beneficiaries or family members who are having a Personal account number (From bank society) can be a member of a Small group. Validate this when adding members to a Small group.

The fields to be filled are :

- GN Division to which the SDO is assigned (auto-populate)
- Status
- Beneficiary List
- Family Member List
- Details and reports may need to be added or changed as and when required

SUPPORT PROCESS (HIGH-LEVEL OVERVIEW)



SERVICE LEVEL AGREEMENT *for* SUPPORT AND MAINTENANCE SERVICES

i. Introduction

The aim of this agreement is to provide a basis for close co-operation between the Client and the Consultant for support and maintenance services to be provided by the Consultant, thereby ensuring a timely and efficient support service is available. The objectives of this agreement are detailed in Section 1.1.

This agreement is contingent upon each party knowing and fulfilling their responsibilities and generating an environment conducive to the achievement and maintenance of targeted service levels.

1. Objectives of Service Level Agreements

- 1) To create an environment conducive to a co-operative relationship between Client, Consultant and Client's representatives (government organizations) to ensure the effective support of all end users.
- 2) To document the responsibilities of all parties taking part in the Agreement.
- 3) To define the commencement of the agreement, its initial term and the provision for reviews.
- 4) To define in detail the service to be delivered by each party and the level of service expected, thereby reducing the risk of misunderstandings.
- 5) To institute a formal system of objective service level monitoring ensuring that reviews of the agreement is based on factual data.
- 6) To provide a common understanding of service requirements/capabilities and of the principles involved in the measurement of service levels.
- 7) To provide for all parties to the Service Level Agreement a single, easily referenced document which caters for all objectives as listed above.

2. Service Level Monitoring

The success of Service Level Agreements (SLA) depends fundamentally on the ability to measure performance comprehensively and accurately so that credible and reliable information can be provided to customers and support areas on the service provided.

Service factors must be meaningful, measurable and monitored constantly. Actual levels of service are to be compared with agreed target levels on a regular basis by both Client and Consultant. In the event of a discrepancy between actual and targeted service levels both Client and Consultant are expected to identify and resolve the reason(s) for any discrepancies in close co-operation.

Service level monitoring will be performed by Client. Reports will be produced as and when required and forwarded to the Consultant.

3. Principal Period of Support (PPS) Requirements

The Principal Period of Support (PPS) is considered in 2 categories as follows;

PPS category	Duration	Applicability
PPS1	From 08:00 AM to 09:00 PM, all days in the week (including public and mercantile holidays)	For front-end portlets and supporting back-end applications (web services, etc...)
PPS2	From 08:00 AM to 05:00 PM Monday to Friday (excluding public holidays)	For back-end services within the departments.

Consultant MUST provide System Support and Maintenance Services during the above stipulated times.

4. On-Call Services Requirements

Consultant MUST make at least ONE qualified personnel available to the Client by telephone and email for the reporting and resolution of non-conformities or other issues, defects or problems. Dedicated telephone numbers and emails should be available for reporting issues. Client will nominate the personnel who are authorized to report non-conformities or other problems with the system from the departments. Reporting of non-conformities includes requests by the Client to apply critical software updates or patches.

Table-1 shows the response priority assigned to faults according to the perceived importance of the reported situation and the required initial telephone response times for the individual priority ratings. All times indicated represent telephone response time during specified PPSs. The indicated telephone response time represents the maximum delay between a fault/request being reported and a Consultant's representative contacting the Client by telephone. The purpose of this telephone contact is to notify the Client of the receipt of the fault/request and provide the Client with details of the proposed action to be taken in respect of the particular fault/request.

	Business Critical	Non-Business Critical
Fatal	30 minutes	45 minutes
Impaired	45 minutes	90 minutes

Table-1: Response Priority

Note:

Fatal - Total system inoperability

Impaired - Partial system inoperability

Business Critical - Unable to perform core business functions

Non-Business Critical - Able to perform limited core business functions

Consultant notification can occur outside PPS time, and thus the response may occur after the next PPS begins. Furthermore, "Time to Arrive On-Site (Table-3)" starts from PPS starting time and "Time to Resolve the Problem" is PPS time starting from the actual time of arrival on site.

5. Problem Resolution and Penalties

If problems have not been corrected within two (2) hours of the initial contact, the Consultant

shall send qualified maintenance personnel to the respective Client's site to take necessary actions to correct the issue reported (defect, problem or non-conformity).

If faults are not corrected within the time limits specified in the Table-2, the Client shall be entitled to a penalty payment for each hour that the Consultant fails to resolve the fault.

The time to arrive on-site is specified in the Table-3.

	Business Critical	Non-Business Critical
Fatal	6 Hours LKR 5,000.00	10 Hours LKR 3,000.00
Impaired	10 Hours LKR 3,000.00	15 Hours LKR 2,000.00

Table-2: Resolution Time and Penalties

	Business Critical	Non-Business Critical
Fatal	2 Hours	3 Hours
Impaired	3 Hours	5 Hours

Table-3: Time to arrive on-site

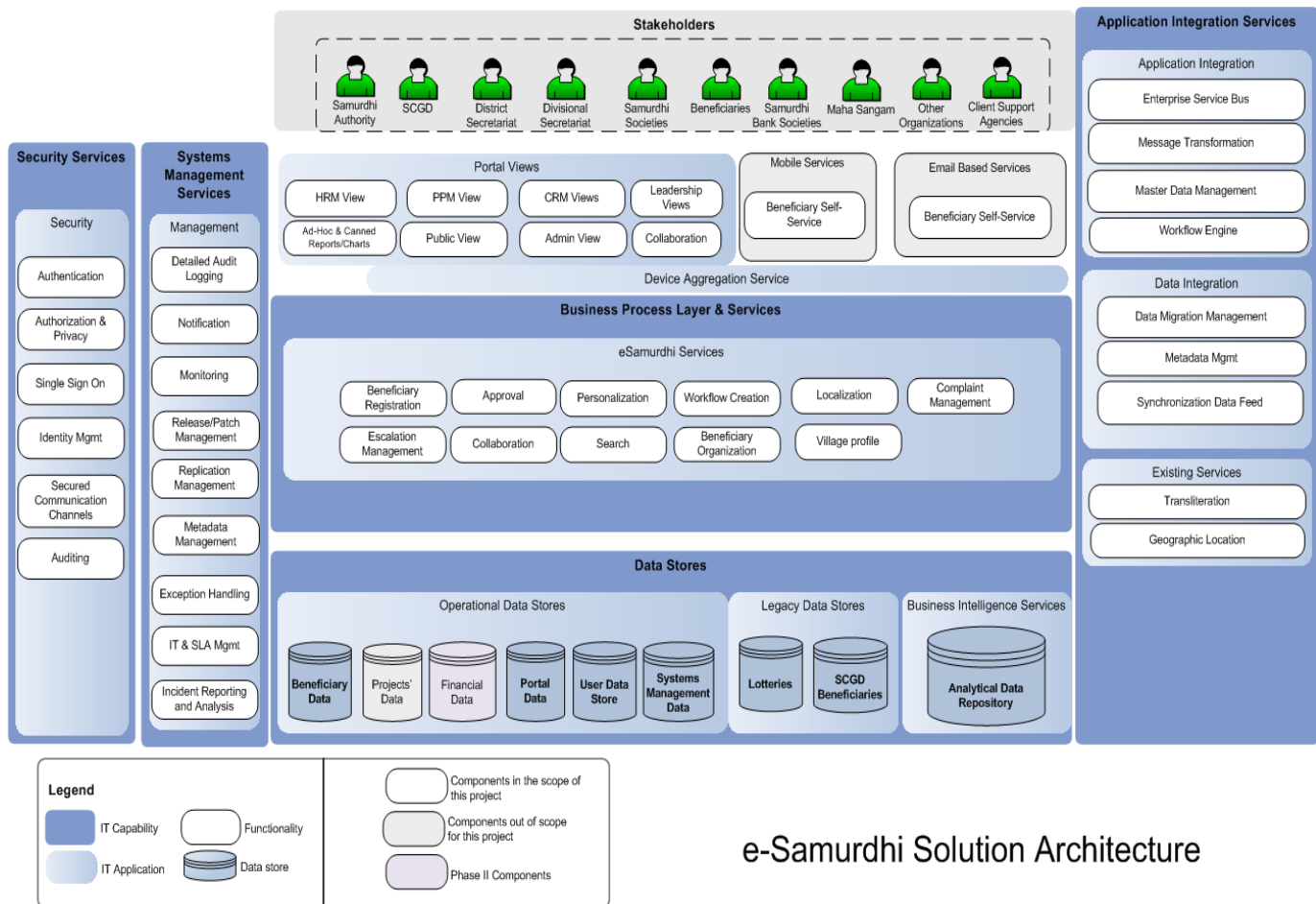
Annex 4

CRM Architectural Document

eSamurdhi Architecture

Functional Architecture

The eSamurdhi application provides a collective view of Beneficiary Management, Project Management, Escalation workflow and their integration. The complete system level solution architecture is as follows:



e-Samurdhi Solution Architecture

In current scope of Deloitte's work, only CRM and information portal set up and deployment strategy is shown in details.

Solution Architecture

The following diagram depicts the logical architecture for eSamurdhi project:

