

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
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20th January, 2025

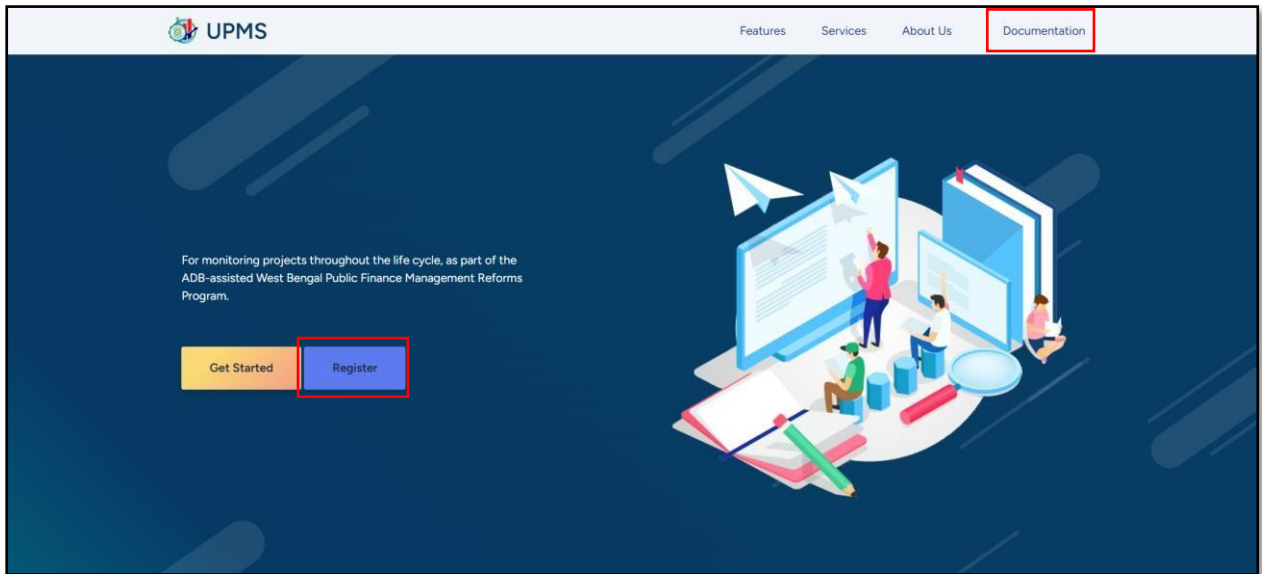
CONTENTS

1) User Registration & Onboarding	
a) Registration	3-15
b) User Log In	
c) Create User	
d) Invite User	
e) Manage User	
f) Reset Password	
g) Attach Multiple Role	
h) Attach Multiple Resources	
2) Master Data Management	16-27
a) Area Master (State, District, Block, Municipality)	
b) SOR Related Master (Formulas, Charge Components, Estimate Approval Categories, Schedule Rate Categories)	
c) Environment Master (Departments, Designations, Recommenders)	
d) Document Master (Manual Documents, Document Types)	
3) Project Flow	26-35
a) Create Project	
b) Add site & Upload Document	
c) Project Requisition	
d) Planning	
e) Designing	
f) Forward Estimate with title	
4) Create Project Estimate	36
5) Add estimate item	37 – 39
6) Add Non-schedule Item	39 - 40
7) Add Non-Schedule item in Estimates	41
8) Schedule Rate	42 – 53
9) Rate Analysis	54-62

1.

a) User Registration

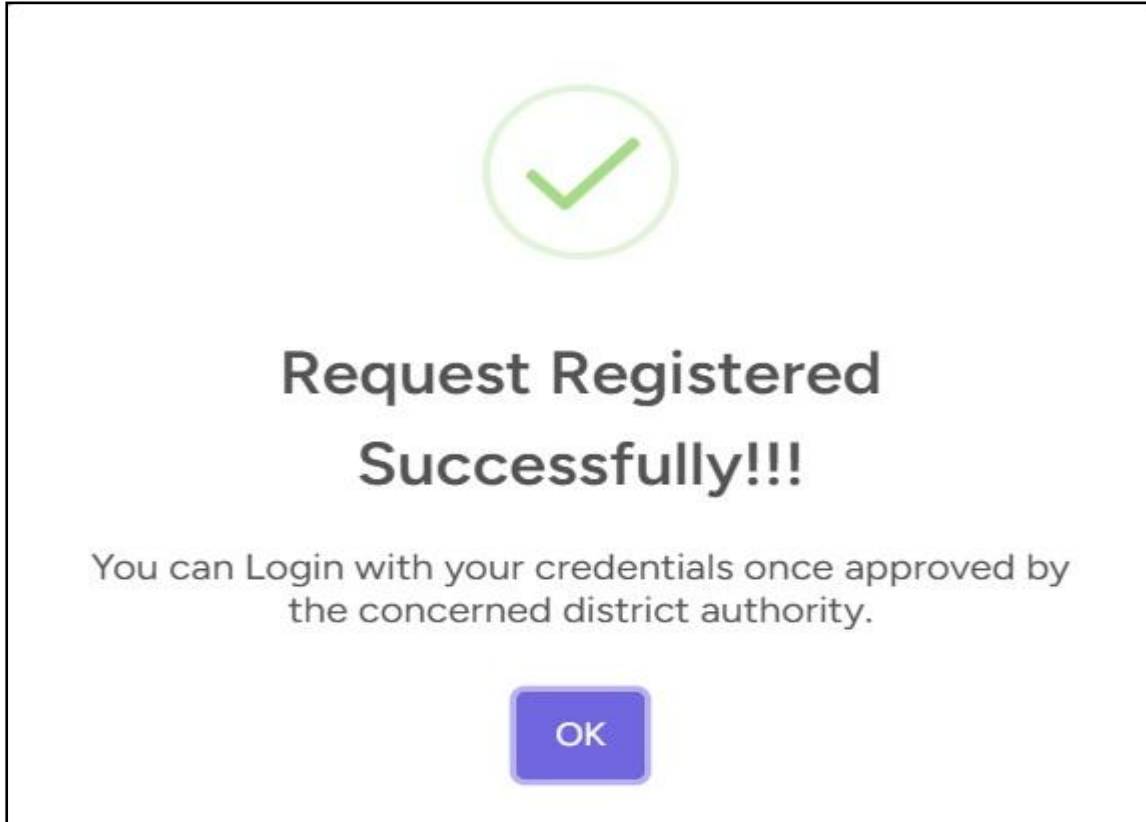
At First click on upms.wb.gov.in, this will redirect to the Home page of **UPMS** web application. From here click on the **Register** button.



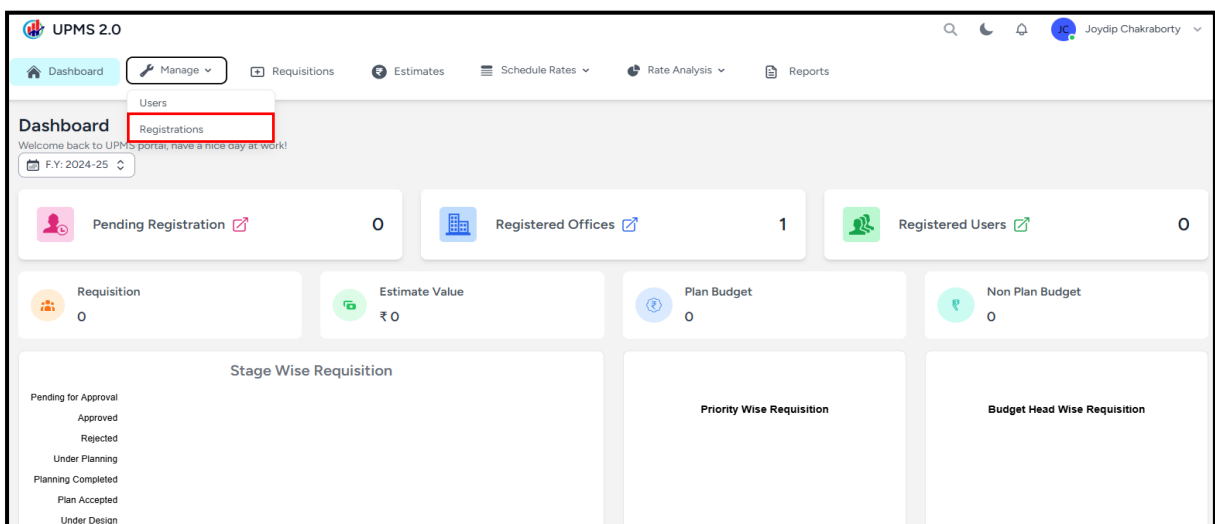
After clicking on the button it will redirect to a **Registration Form** like this, fill the form with proper information like **district, office, name, designation, mobile, email and password**. Finally click on Register button.

The screenshot shows the UPMS Registration Form. It contains several input fields: DISTRICT (dropdown menu with KOLKATA selected), OFFICE (dropdown menu with Planning, PWRD selected), NAME (text field with Your Name), DESIGNATION (dropdown menu with CHIEF ENGINEER WEST ZONE PWD selected), MOBILE (text field with 9007652565), EMAIL (text field with youremail@gmail.com), PASSWORD (text field with masked characters), and CONFIRM PASSWORD (text field with masked characters). At the bottom, there is a blue Register button highlighted with a red rectangle.

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.

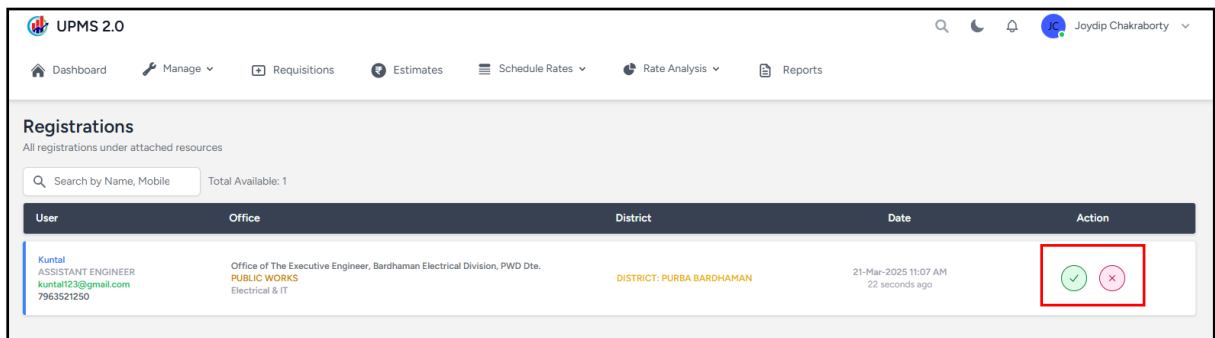


Now, the **Department Admin** or **Office Admin** (which was selected as time of registration) will log in with his credentials. Then he have to click on registration under Manage dropdown.



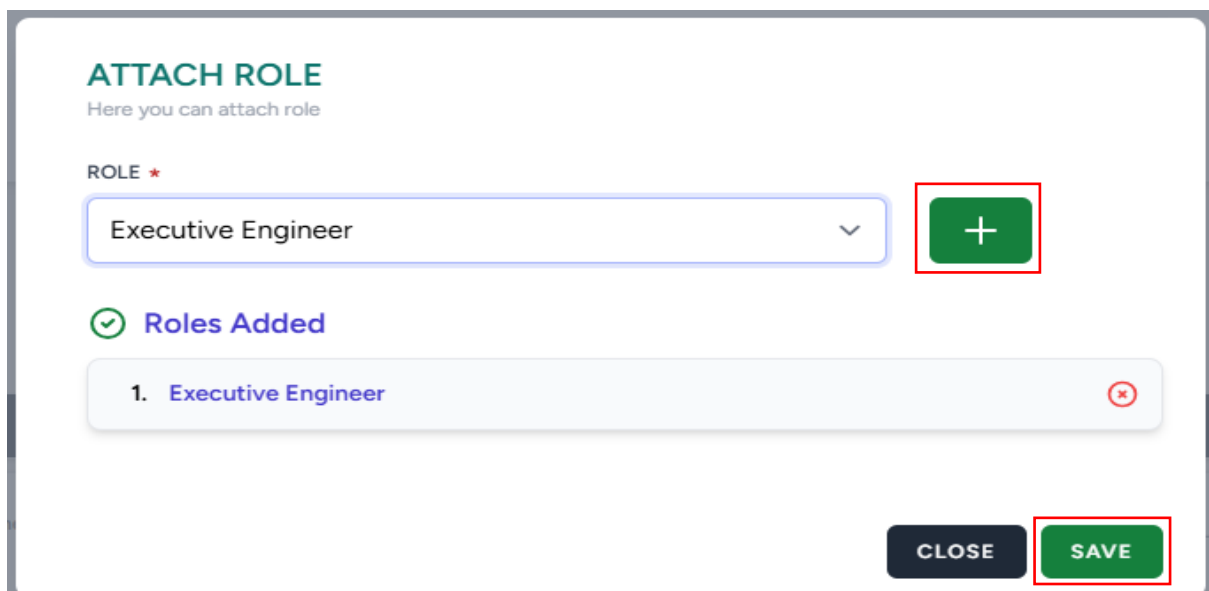
UPMS Version 2.0

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 Dto. 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 *

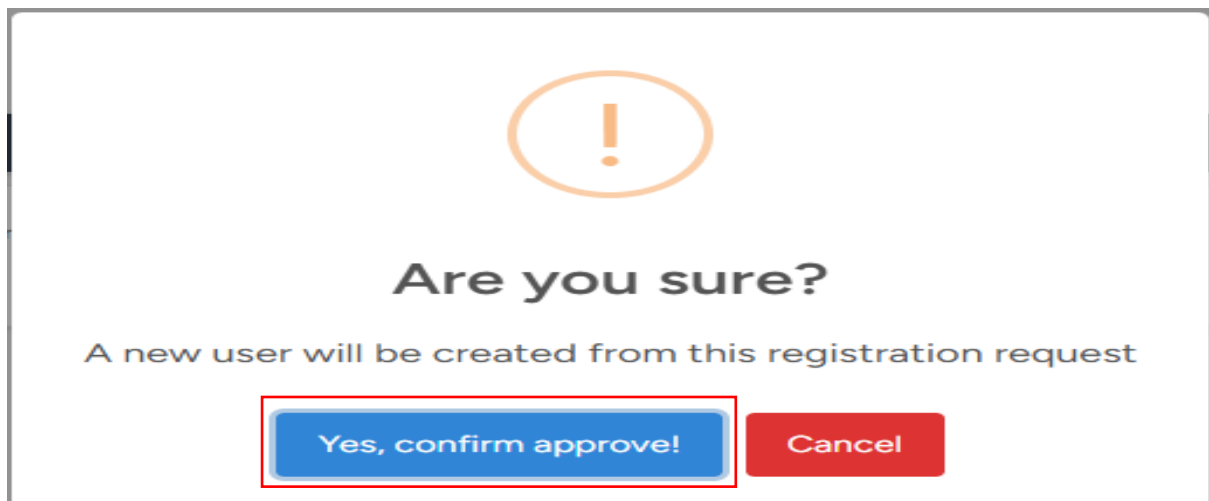
Executive Engineer



 **Roles Added**

1. Executive Engineer

CLOSE **SAVE**

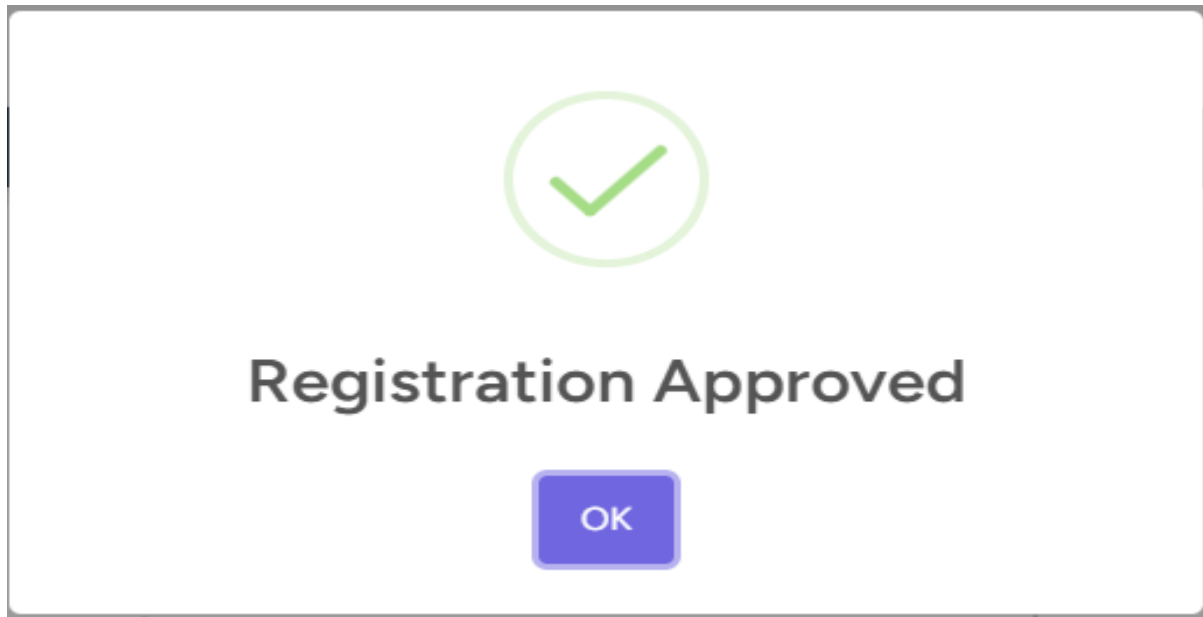




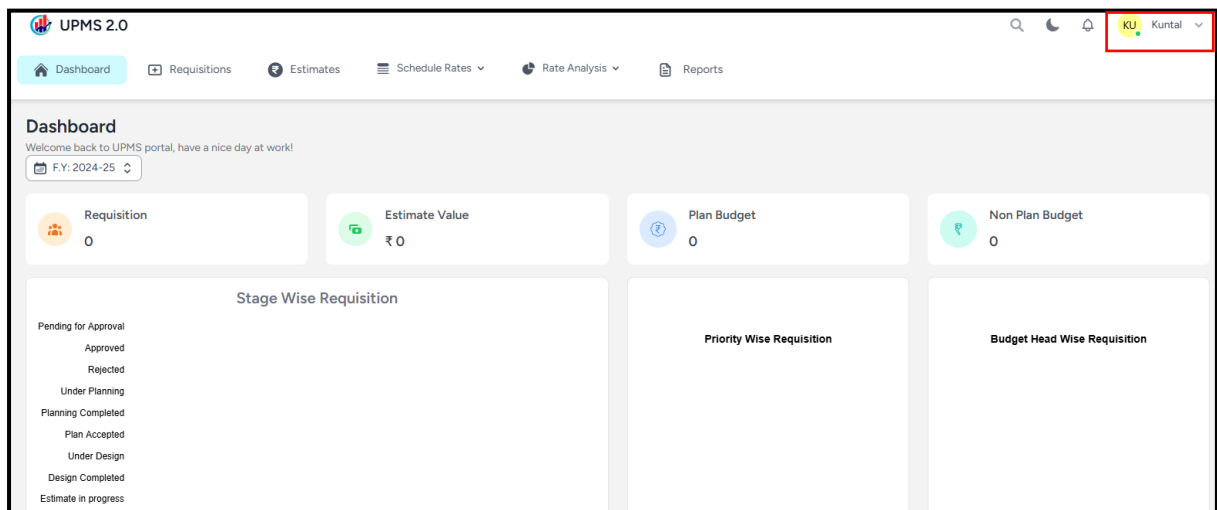
Are you sure?

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.



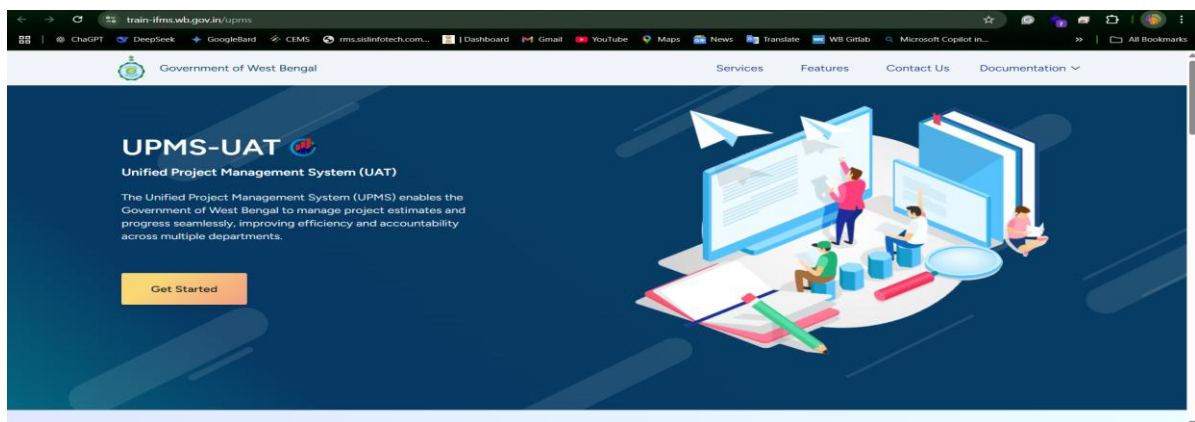
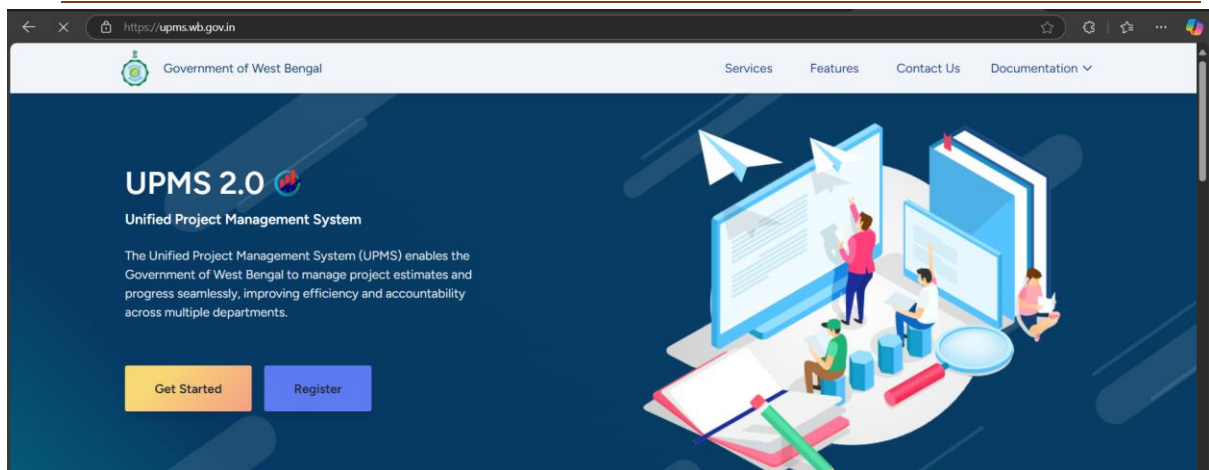
b) User Login

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.

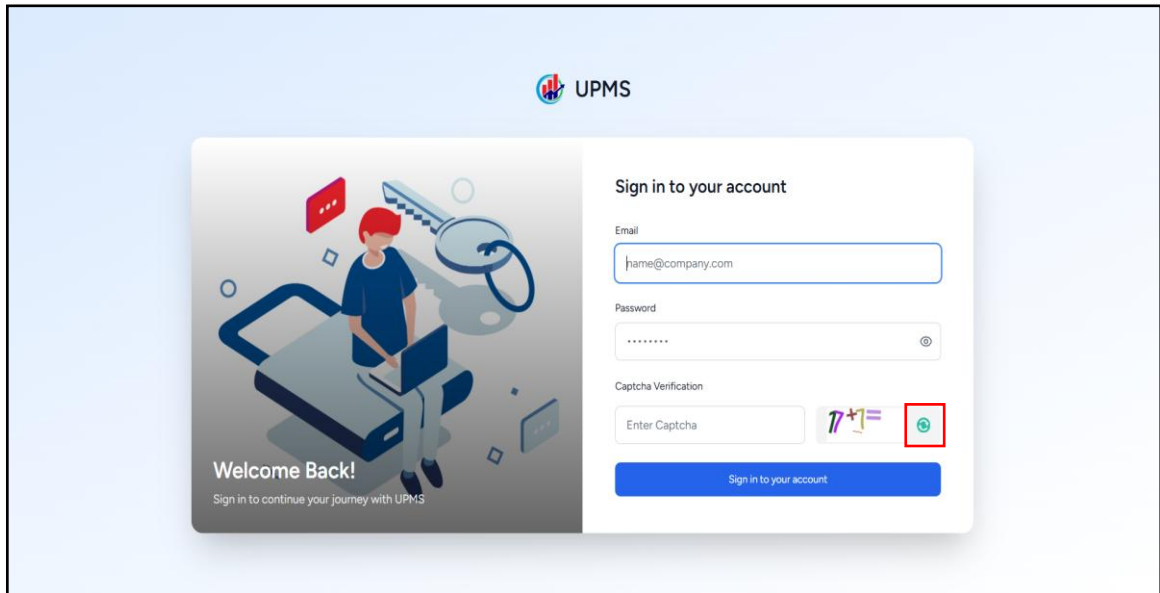
Login Form

The screenshot shows the login form for the UPMS system. The form is titled "Sign in to your account" and is located on the right side of the page. It includes fields for Email, Password, and Captcha Verification. The Email field contains the text "hame@company.com". The Password field is masked with dots. The Captcha Verification field contains the text "Enter Captcha" and a captcha image. Below the form is a blue button labeled "Sign in to your account". On the left side of the form, there is a graphic with the text "Welcome Back!" and "Sign in to continue your journey with UPMS". The UPMS logo is visible at the top center of the page.

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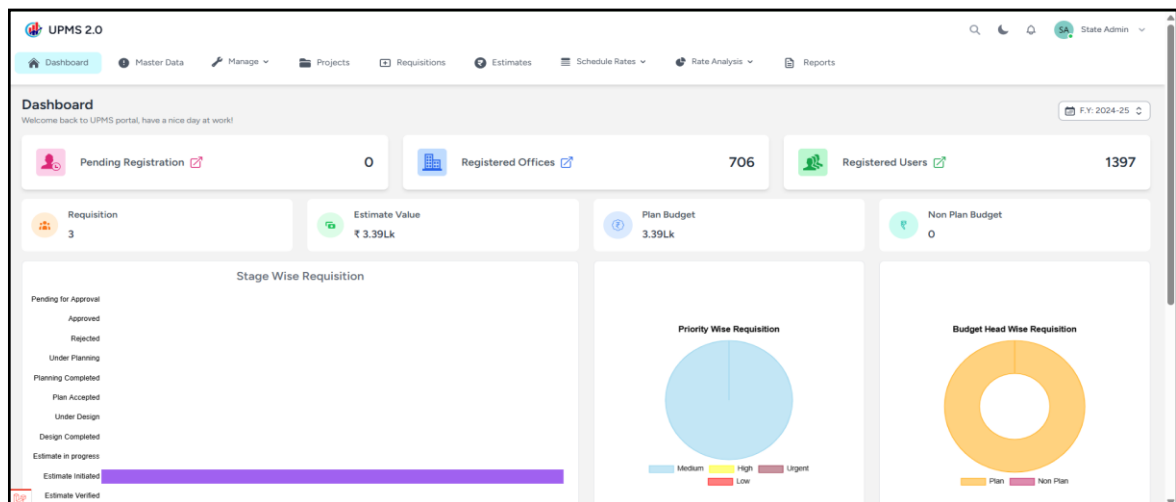
If Captcha is not understood, click the refresh button on the captcha box on the right side.

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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The screenshot shows the 'Users' section of the UPMS 2.0 interface. At the top, there's a navigation bar with icons for Dashboard, Master Data, Manage, Projects, Requisitions, Estimates, Schedule Rates, Rate Analysis, and Reports. Below this, the 'Users' section is titled 'All registered Users'. A search bar is present with the text 'Search User' and 'Total Available: 1397'. To the right of the search bar are buttons for 'All Roles', 'All Groups', 'Add User', and 'Invited Users'. The main content is a table with columns: Name, Resources, Roles, Status, and Actions. The table lists five users: ATANU CHATTERJEE (Junior Engineer (Civil)), SURAJIT MANDAL (EXECUTIVE ENGINEER), SURAJIT DAS (Junior Engineer (Civil)), Ananda Majumder (Officer-on-Special Duty), and BIVABASU CHATTOPADHYAY (Deputy Secretary). Each user entry includes an 'Attachments' icon and a 'Status' indicator (ACTIVE).

Name	Resources	Roles	Status	Actions
ATANU CHATTERJEE Junior Engineer (Civil) knivipppw@gmail.com 9477004322	Attachments	Junior Engineer	ACTIVE	
SURAJIT MANDAL EXECUTIVE ENGINEER mnpwvrbouh@gmail.com 7980257059	Attachments	Executive Engineer Executing Authority	ACTIVE	
SURAJIT DAS Junior Engineer (Civil) baguhatghwaysection@gmail.com 8240322425	Attachments	Junior Engineer	ACTIVE	
Ananda Majumder Officer-on-Special Duty osdsgov715-wb@bangla.gov.in 8910786519	Attachments	State Admin	ACTIVE	
BIVABASU CHATTOPADHYAY Deputy Secretary bivabasu.wd@rediffmail.com 6290748054	Attachments	Department Admin	ACTIVE	

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

c) Create User

This screenshot is identical to the previous one, but the 'Add User' button in the top right corner of the 'Users' section is highlighted with a red box. The table of users remains the same.

>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
Department - PUBLIC WORKS

Selected: 1 Clear

SAVE

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

Here create user list is shown

Create User List

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Dashboard Manage Projects Requisitions Estimates Schedule Rates Rate Analysis Reports

Invited Users

Here you can find all invited users by yourself

Search by name, mobil Total Available: 1

ALL REGISTERED USERS

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

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Dashboard Manage Projects Requisitions Estimates Schedule Rates Rate Analysis Reports

Invited Users

Here you can find all invited users by yourself

Search by name, mobil Total Available: 1

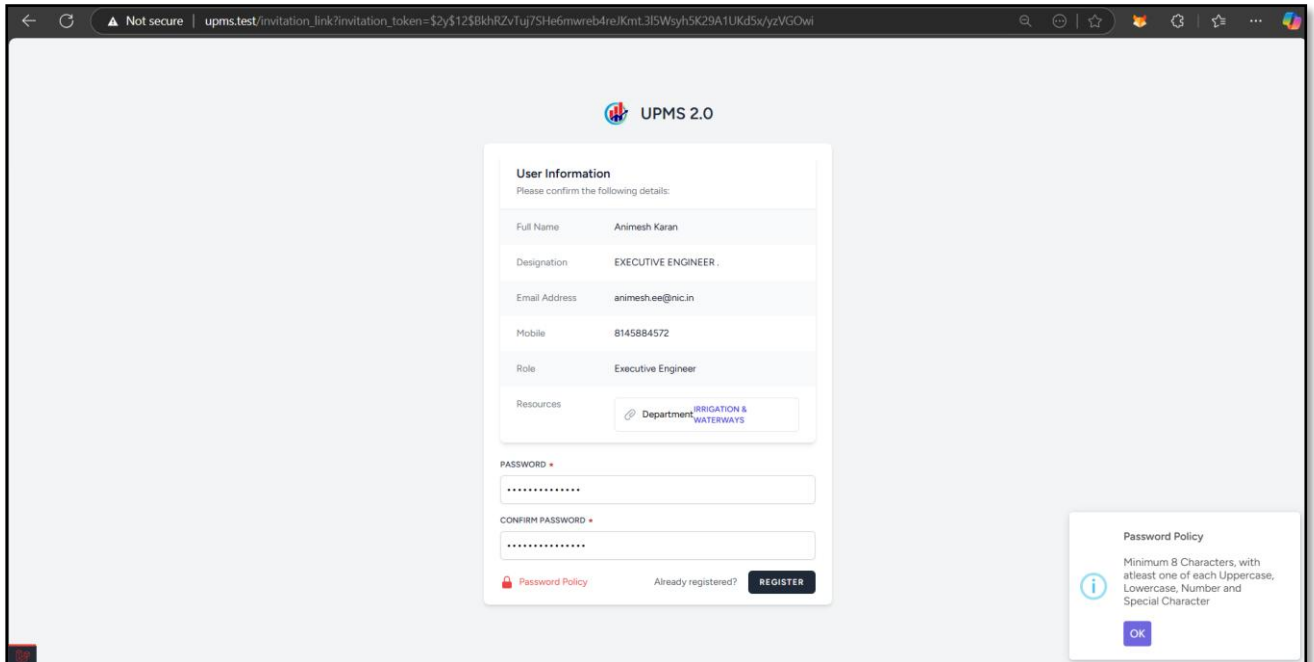
ALL REGISTERED USERS

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	

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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



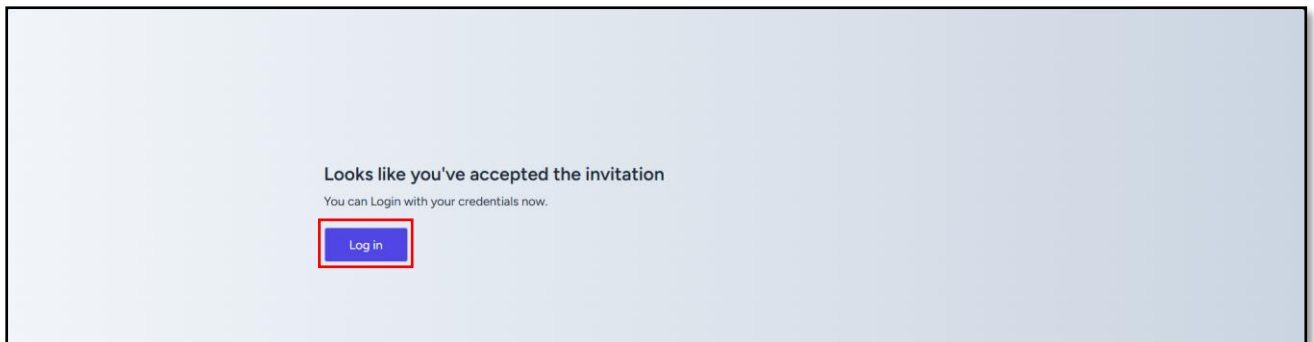
The screenshot shows the UPMS 2.0 Password Set Form in a web browser. The form is titled "User Information" and asks the user to confirm their details. The details are as follows:

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

Below the user information, there are two password fields: "PASSWORD" and "CONFIRM PASSWORD". Both fields are currently empty. To the right of the password fields, there is a "Password Policy" box that states: "Minimum 8 Characters, with atleast one of each Uppercase, Lowercase, Number and Special Character". Below the password fields, there is a "REGISTER" button and a link to "Already registered?".

- >Click on the Login button after set the password

User Log In Form

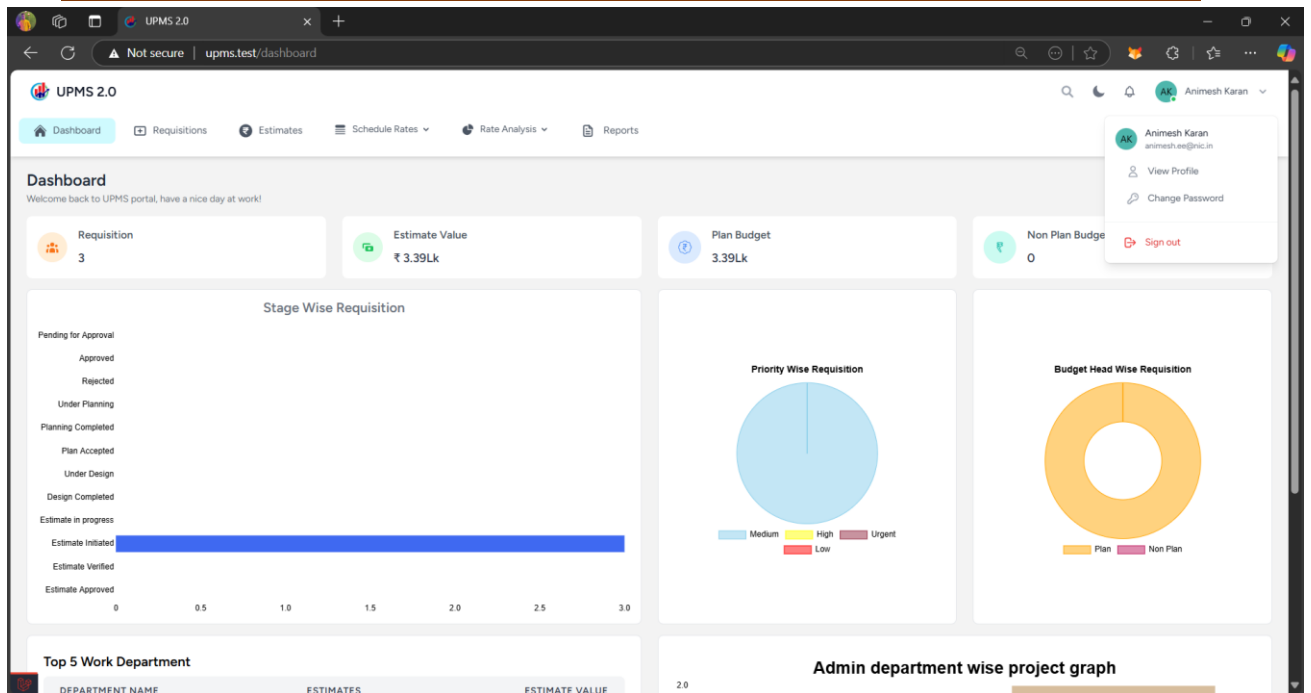


The screenshot shows the User Log In Form. The message "Looks like you've accepted the invitation" is displayed, followed by "You can Login with your credentials now." Below this message, there is a "Log in" button, which is highlighted with a red box.

- >Give the user credentials

User is Login

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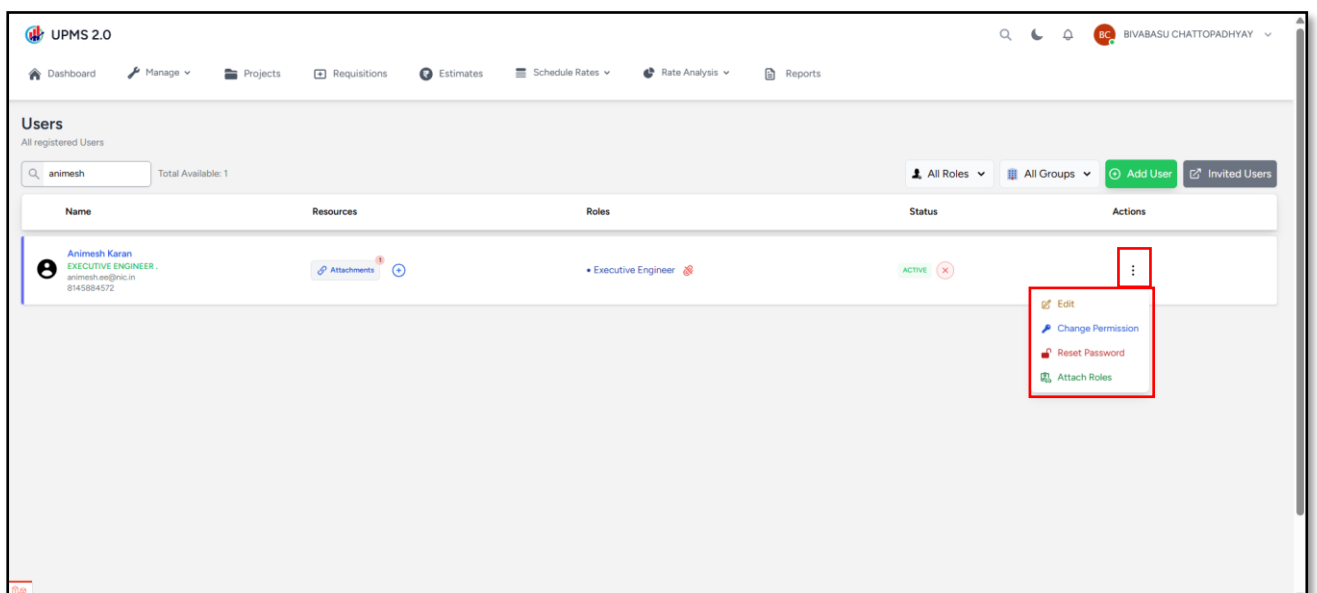


e) Manage User

>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.

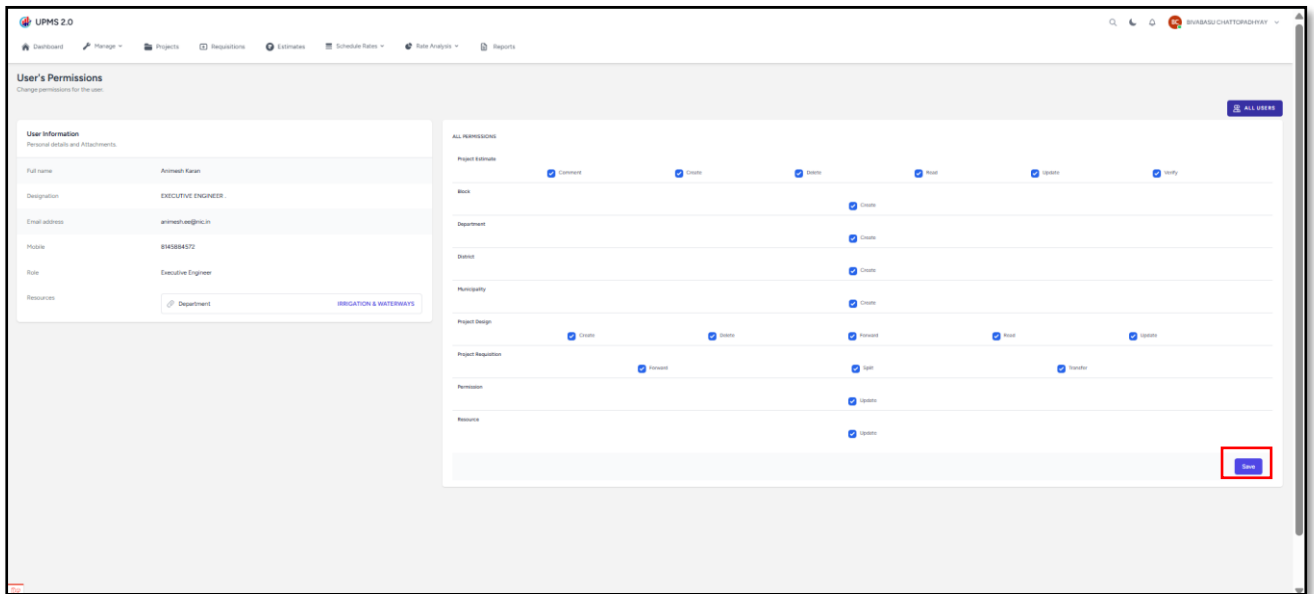
Manage User



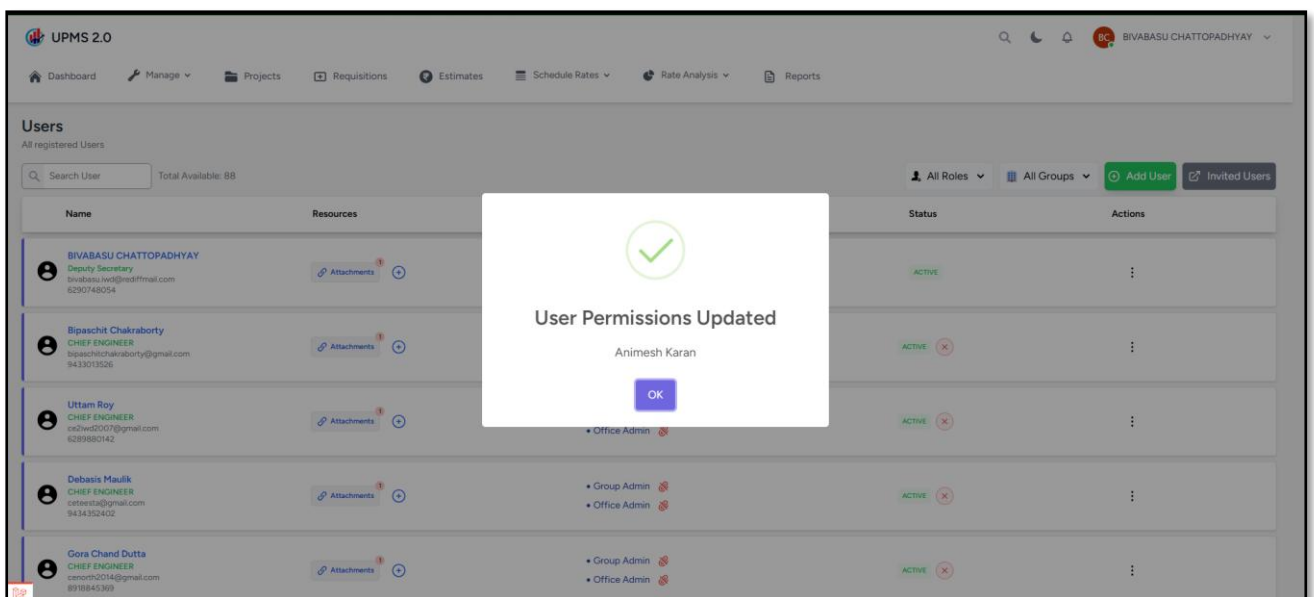
UPMS Version 2.0

>Click on Change user permission and update all permissions

>Then click on save button



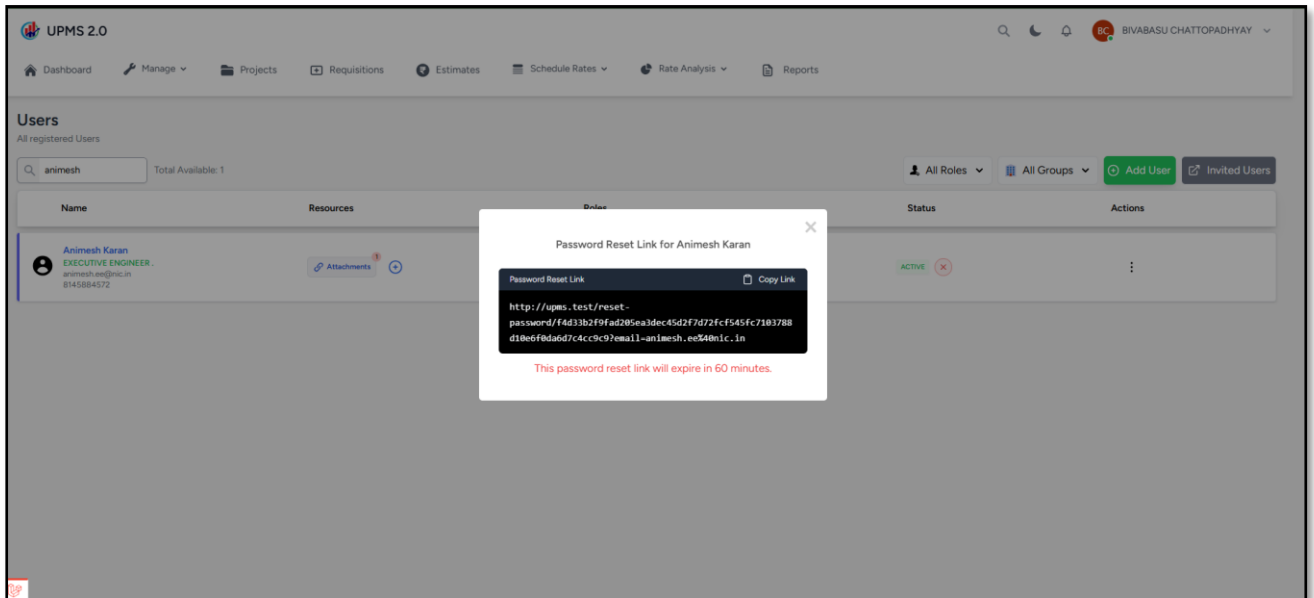
Then a pop message is shown user permissions updated.



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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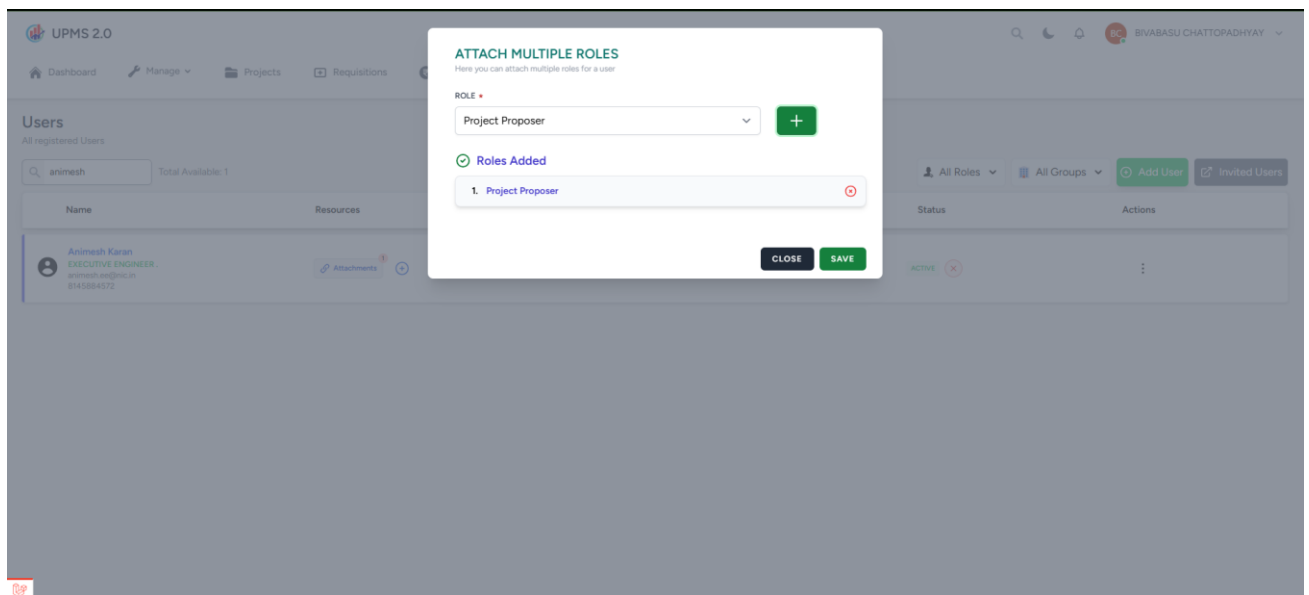


After copying do the same of Adding new user set password

>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

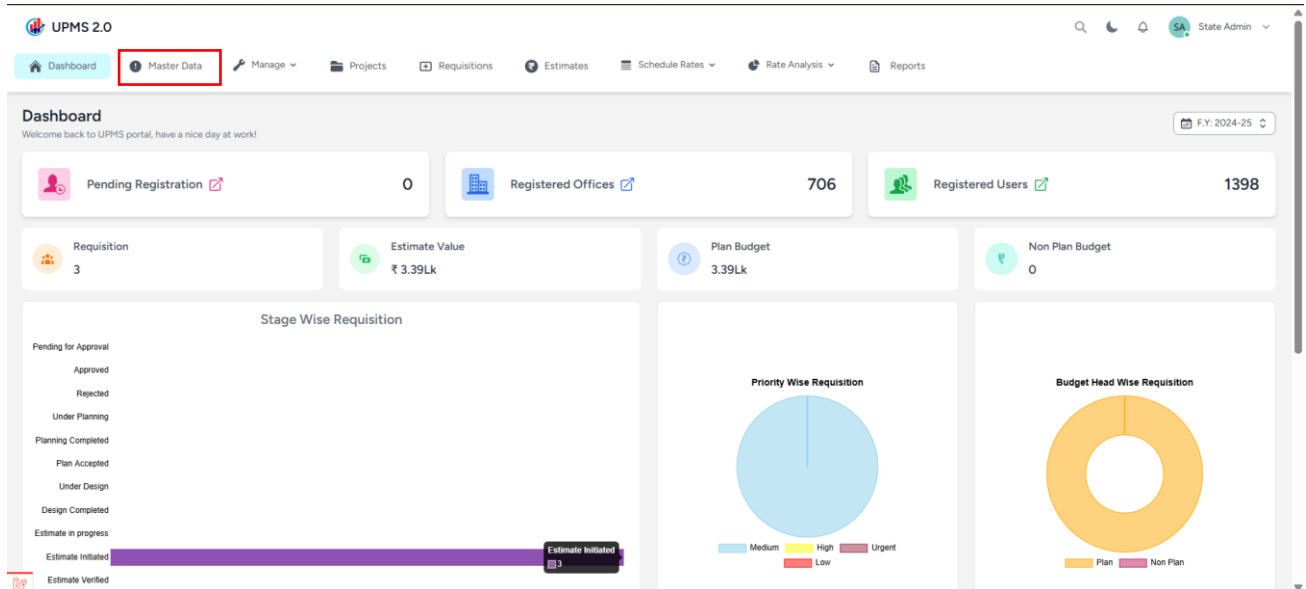
The screenshot shows the 'Users' management interface in UPMS 2.0. The header includes navigation links like Dashboard, Manage, Projects, Requisitions, Estimates, Schedule Rates, Rate Analysis, and Reports. The main section is titled 'Users' and shows 'All registered Users' with a search bar and a total count of 88. A table lists users with columns: Name, Resources, Roles, Status, and Actions. The first user, Bivabasu Chattopadhyay, is highlighted. A tooltip is shown over the 'Add Another Resource' button in the Resources column, indicating the option to 'Add NonScheduleZone'.

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

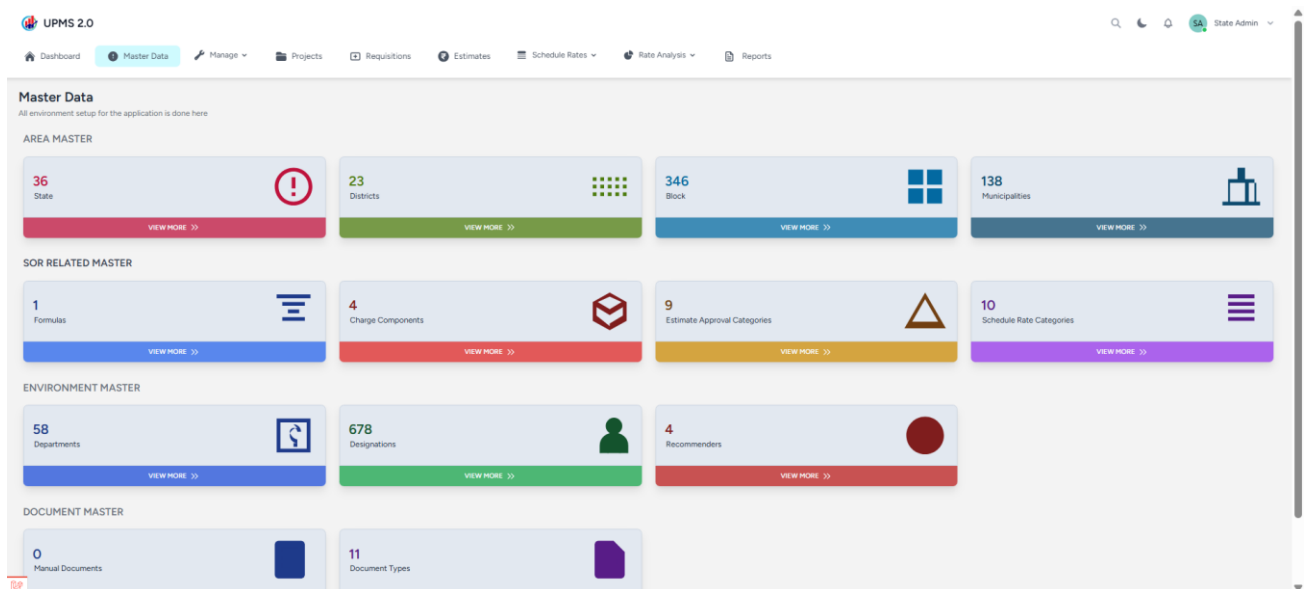
The screenshot shows the 'ATTACH RESOURCES' modal open over the Users list. The modal title is 'ATTACH RESOURCES' and it states 'Here you can attach multiple resource for a user'. It contains two dropdown menus: 'ROLE' (set to 'Select') and 'RESOURCE TYPE' (set to 'Select'). To the right of the 'RESOURCE TYPE' dropdown is a '+' button. Below these is a list of 'Resources' with a 'Selected: 1' indicator and a 'Clear' button. The selected resource is 'Department - IRRIGATION & WATERWAYS'. At the bottom of the modal are 'CLOSE' and 'SAVE' buttons.

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		⋮
2. ANDHRA PRADESH	28	28	State		Edit Delete
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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Master Data : District

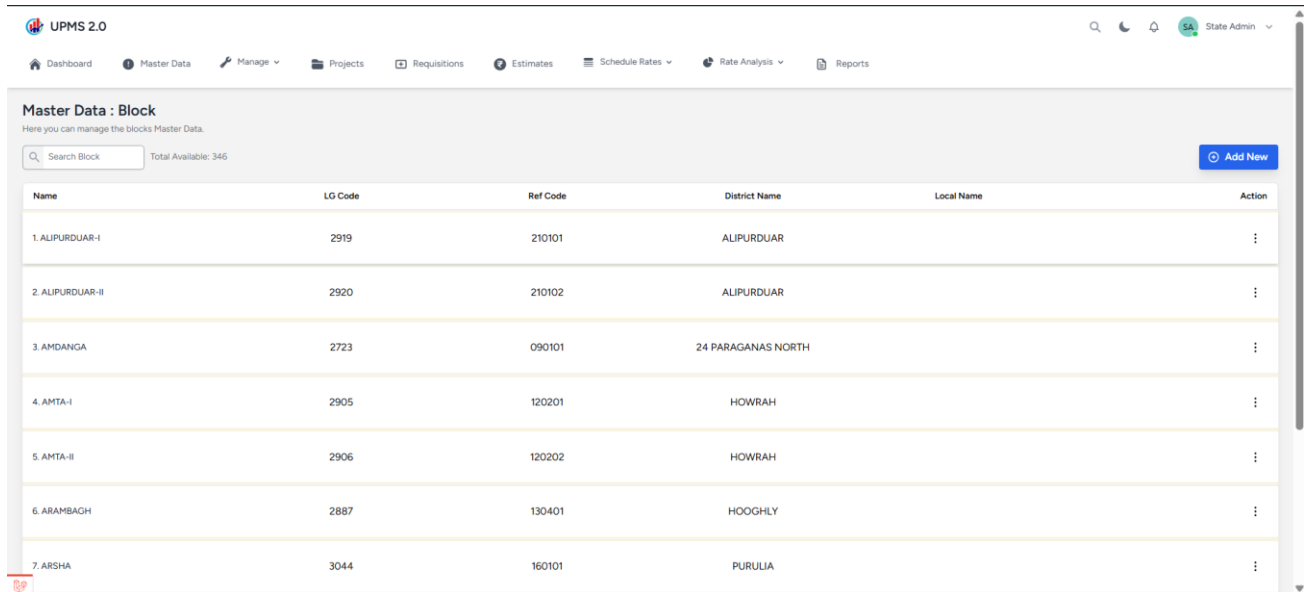
Here you can manage the districts Master Data.

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



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

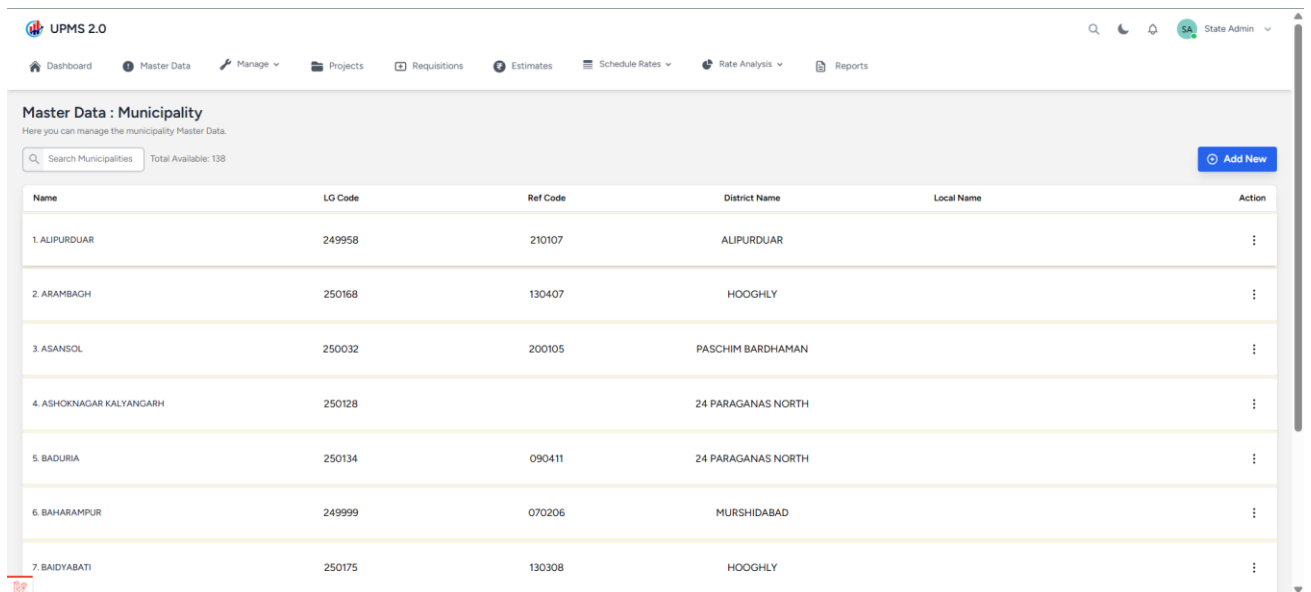
Master Data : Block

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. ARAMBACH	2887	130401	HOOGLY		⋮
7. ARSHA	3044	160101	PURULIA		⋮

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



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

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. ARAMBACH	250168	130407	HOOGLY		⋮
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	HOOGLY		⋮

- 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.

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

Formulas

Search Formula Total Available: 1 Add New

Title	Input Parameters	Equation
1. Simson Rule	w, yfirst, ylast, yodd, yeven	$w/2 + 1/2 * (yfirst + ylast + 2 * yodd + 4 * yeven)$

- Click on Add new and Add Formula

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

Formulas

Search Formula Total Available: 1 Add New

Title	Input Parameters	Equation
1. Simson Rule	w, yfirst, ylast, yodd, yeven	$w/2 + 1/2 * (yfirst + ylast + 2 * yodd + 4 * yeven)$

Create Formula

TITLE: Enter Formula Title

EQUATION: Enter Equation

INPUT PARAMETER 1: Enter Input Parameter

PARAMETER: Select Parameter...

OPERATOR: Select Operator...

Cancel SAVE FORMULA

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Charge Components

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

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

Charge Components

Here you can manage the Charge Component Data.

Search Charge Compo Total Available: 4

Charge Component Name	Initial Value	Action
1. CESS	1.50	⋮
2. District Charge	2.00	Edit Delete
3. GST	18.00	⋮
4. LWC	1.00	⋮

[Add New](#)

Estimate Approval Categories

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

Estimate Approval Categories

Search Category Total Available: 1

Name	Department	Total Estimate Ranges	Action
1. Irrigation & Waterways Development Projects	IRRIGATION & WATERWAYS	4	⋮

[Add New](#)

ENVIRONMENT
FINANCE
FIRE & EMERGENCY SERVICES
FISHERIES
FOOD & SUPPLIES
FOOD PROCESSING INDUSTRIES AND HORTICULTURE
FORESTS
GOVERNOR SECRETARIAT
HEALTH & FAMILY WELFARE
HIGHER EDUCATION
HOME AND HILL AFFAIRS
HOUSING
INDUSTRY COMMERCE AND ENTERPRISES
INFORMATION & CULTURAL AFFAIRS
INFORMATION TECHNOLOGY & COMMUNICATIONS

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

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

Estimate Approval Categories

Search Category Total Available: 1

Name	Department	Total Estimate Ranges	Action
1. Irrigation & Waterways Development Projects	IRRIGATION & WATERWAYS	4	⋮

[Add New](#)

ENVIRONMENT
FINANCE
FIRE & EMERGENCY SERVICES
FISHERIES
FOOD & SUPPLIES
FOOD PROCESSING INDUSTRIES AND HORTICULTURE
FORESTS
GOVERNOR SECRETARIAT
HEALTH & FAMILY WELFARE
HIGHER EDUCATION
HOME AND HILL AFFAIRS
HOUSING
INDUSTRY COMMERCE AND ENTERPRISES
INFORMATION & CULTURAL AFFAIRS
INFORMATION TECHNOLOGY & COMMUNICATIONS

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

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The screenshot shows the 'Estimate Approval Categories' page in the UPMS 2.0 application. The 'Permission' tab is active, displaying a list of assigned permissions: 'create project estimate', 'verify project estimate', and 'approve project estimate'. Each item has a red 'X' icon to its right. On the right side, there is a 'Create Permission' form with a dropdown menu labeled 'PERMISSION' and a 'Save' button.

Manage Roles.

The screenshot shows the 'Estimate Approval Categories' page in the UPMS 2.0 application. The 'Roles' tab is active, displaying a list of assigned roles: 'Junior Engineer', 'Executive Engineer', 'Superintending Engineer', 'Assistant Engineer', and 'Zonal Chief Engineer'. Each item has a red 'X' icon to its right. On the right side, there is a 'Create Permission' form with a dropdown menu labeled 'ROLE' and a 'Save' button.

Manage Range

The screenshot shows the 'Estimate Approval Categories' page in the UPMS 2.0 application. The 'Range' tab is active, displaying a table with the following data:

Sl. No	Min Amount	Max Amount	Role Permission	Action
1.	1	500000	2	
2.	500001	10000000	3	
3.	10000001	25000000	4	
4.	25000001		5	

At the top right of the table, there is a 'New' button. A tooltip 'View Details' is visible over the 'View Details' icon in the first row.

- 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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Create Estimate Range

Department : IRRIGATION & WATERWAYS
Estimate Category : Irrigation & Waterways Development Projects

MINIMUM AMOUNT: 1
MAXIMUM AMOUNT: 500000

SAVE

Sl.No	Min Amount	Max Amount	Role Permission
1.	1	500000	2
2.	500001	1000000	3
3.	1000001	2500000	4
4.	2500001		5

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

View Estimate Range

Department : IRRIGATION & WATERWAYS
Estimate Category : Irrigation & Waterways Development Projects
Minimum Amount : 1
Maximum Amount : 500000

ROLE: Junior Engineer
PERMISSION: create project estimate

ADD

Sl No	Role	Permission	Actions
1	Junior Engineer	create project estimate	
2	Assistant Engineer	approve project estimate	

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.

ScheduleRate Category
Here you can manage the ScheduleRates Category.

Search Schedule rate c Total Available: 10

Download Schedule Rate Category Report In Excel

Schedule Rates **Excel** **Add New**

Department Name	Category Name	Schedule Rate (Total)	Schedule Rate Count	Schedule Item Count	Verified	Actions
IRRIGATION & WATERWAYS	Mechanical & Electrical	32	32	1034	32	
IRRIGATION & WATERWAYS	Civil	5	5	437	5	
PANCHAYATS & RURAL DEVELOPMENT	CIVIL	26	26	514	26	
WATER RESOURCES INVESTIGATION & DEVELOPMENT	WRIBDD	22	22	1445	22	
PUBLIC HEALTH ENGINEERING	MECHANICAL	18	18	480	18	
PUBLIC HEALTH ENGINEERING	CIVIL	15	15	846	15	
PUBLIC WORKS	Road & Bridge (Volume III)	23	23	1269	23	
PUBLIC WORKS	Electrical	9	9	1684	9	
PUBLIC WORKS	Building(Volume I)	21	22	2384	22	
PUBLIC WORKS	Sanitary and Plumbing works	12	12	1940	12	

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

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UPMS 2.0 State Admin

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

Schedule Rate Category Details

Here you can manage the Schedule Rates Category Details. [BACK](#)

Department: IRRIGATION & WATERWAYS
Category Name: Mechanical & Electrical
Schedule Rate Total: 32 [Download](#)

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 1 / 2 100% Download Print More




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



Sl 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	☐	Edit Delete
AGRICULTURE	AG	5	WEST BENGAL	☐	Edit Delete
ANIMAL RESOURCES DEVELOPMENT	AD	6	WEST BENGAL	☐	Edit Delete
BACKWARD CLASSES WELFARE	SC	7	WEST BENGAL	☐	Edit Delete
CHIEF MINISTER OFFICE	CH	61	WEST BENGAL	☐	Edit Delete
CONSUMER AFFAIRS	CA	10	WEST BENGAL	☐	Edit Delete
COOPERATION	CO	8	WEST BENGAL	☐	Edit Delete
CORRECTIONAL ADMINISTRATION	JL	33	WEST BENGAL	☐	Edit Delete
COUNCIL OF MINISTERS [HOME (C & E)]	CL	3	WEST BENGAL	☐	Edit Delete
DISASTER MANAGEMENT AND CIVIL DEFENCE	DM	73	WEST BENGAL	☐	Edit Delete

Designation

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

UPMS 2.0

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

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

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Document Master (Manual Documents, Document Types) Manuals

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

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

Manuals

Here you can add and view Manual.

Search Manual Total Available: 1

Add New

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

Document Types

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

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

Document Types

Here you can manage the Document Types Data.

Search Document Type Total Available: 11

Add New

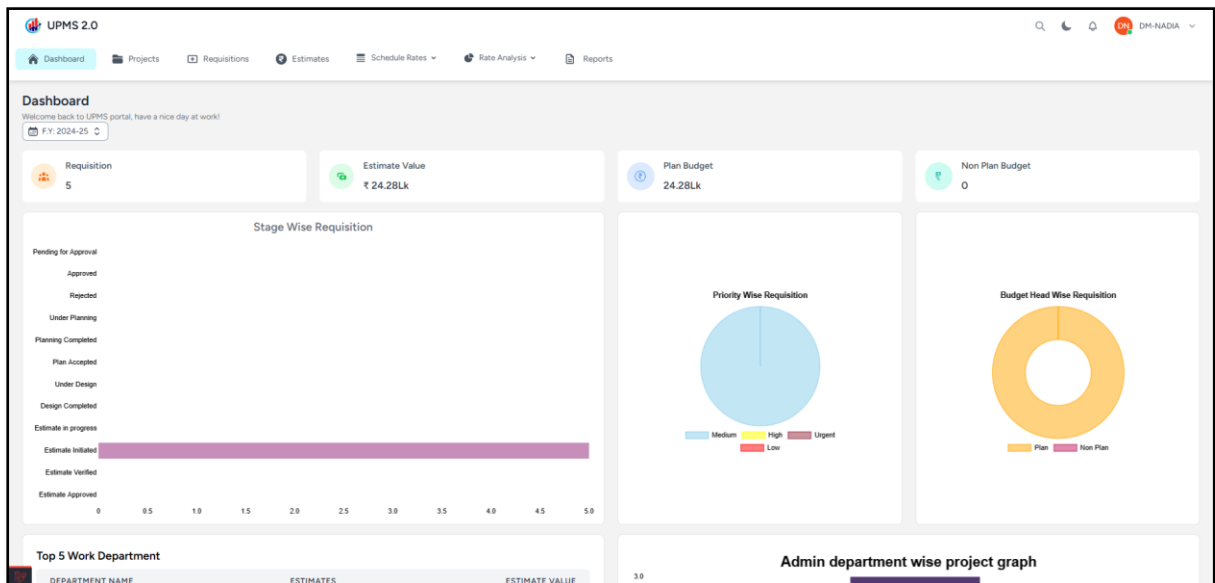
Name Of Document Type	Actions
1. ADCP survey report	
2. Basic survey report	Edit Delete
3. Design document	
4. Design philosophy	
5. Details of cross drainage structure	
6. GAD	
7. Land clearance	
8. Meeting with citizen report	

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.

The screenshot shows the UPMS 2.0 Projects page. It has a search bar and a 'Total Available: 0' indicator. Below the search bar is a table with the following columns: Project Name, Department, Estimated Value, Status, and Actions. The table is currently empty, displaying a 'No Projects Found' message with a plus icon.

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 divided into several sections: 'PROJECT TITLE' with a text input field; 'PROJECT DESCRIPTION' with a rich text editor; 'RECOMMENDER' with a dropdown menu; 'ADMIN DEPARTMENT' with a dropdown menu; 'PROJECT MODE' with a dropdown menu; and 'REGISTRATION DATE' with a date picker. A 'Next Step' button is highlighted in the bottom right corner.

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 divided into several sections: 'Project Title' (pre-filled with 'Test project for documentation'), 'Admin Department' (pre-filled with 'PUBLIC WORKS'), 'Project Mode' (pre-filled with 'New'), 'DISTRICT' with a dropdown menu, 'LOCATED AT TYPE' with a dropdown menu, 'LOCATION' with a dropdown menu, and 'ADDRESS' with a rich text editor. An 'ADD' button is highlighted in the bottom right corner. Below the form, there is a table with columns: District, Type, Location, Address, and Action. The table is currently empty, showing 'No Site found.'.

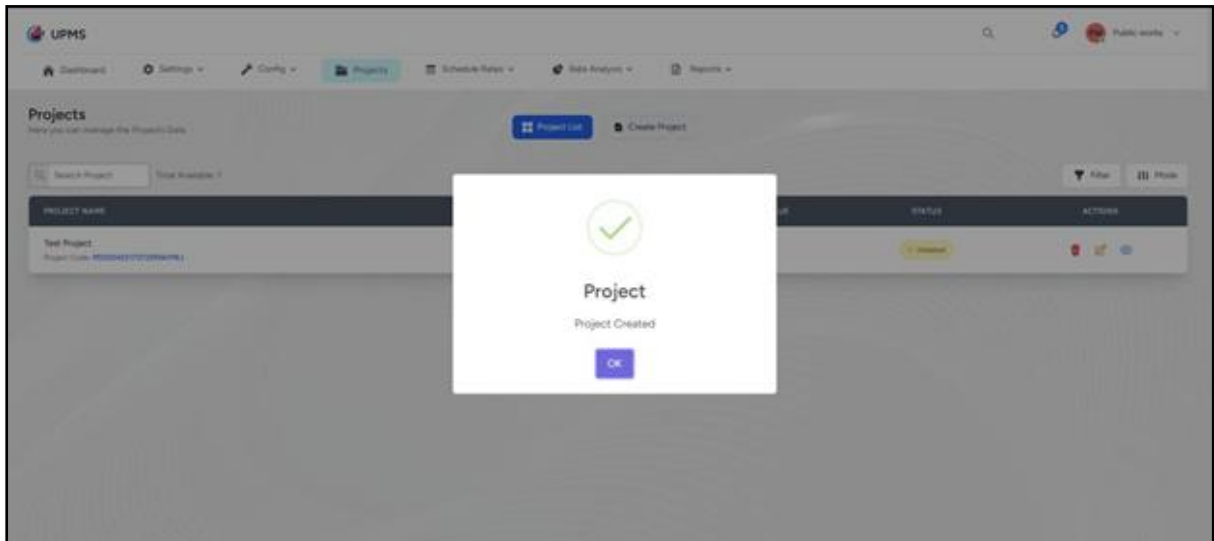
This is the second step to create a project. Here, basically have to put Project Location details. The project can be for a single location or multiple locations, that's why in project location section there has a provision for select multiple location under block or municipality. So, select district, 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.

UPMS Version 2.0

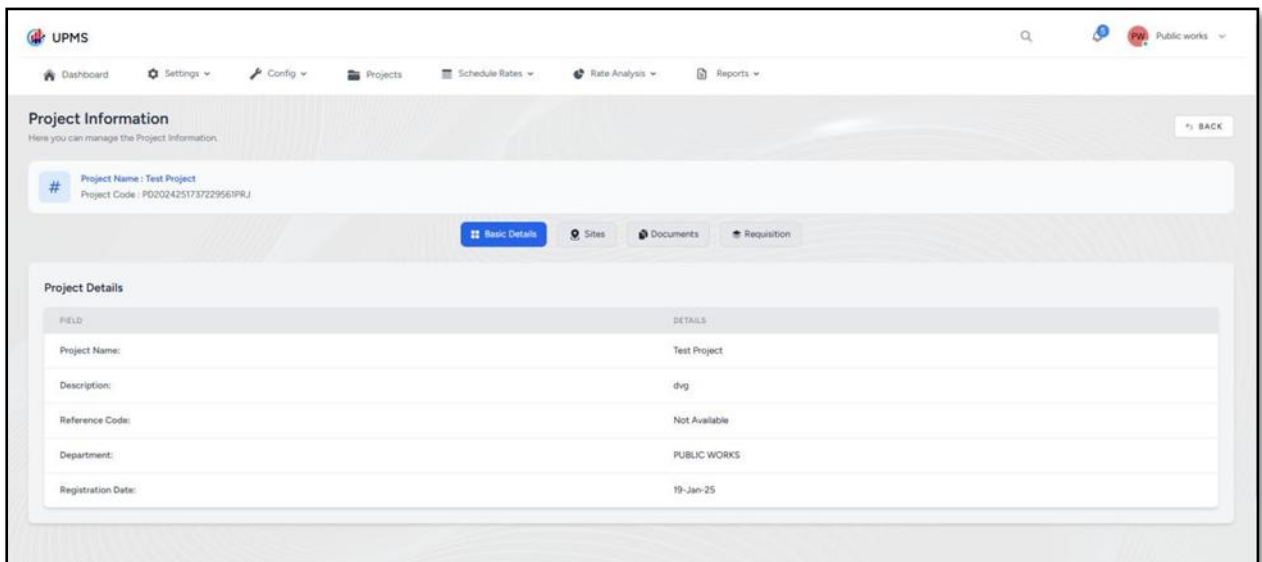
This is Project Document section. Here put a title of document, select document type, prepared date of project document and upload a document (preferred PDF) related to project (if available). Then click on the **Add** button and click on **Next** button.

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.

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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.

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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 displays the 'Project Requisition' page in the UPMS application. The page has a top navigation bar with tabs like Dashboard, Settings, Config, Project Requisitions, Schedule Rates, Rate Analysis, and Reports. Below the navigation bar, there's a search bar and a 'Total Available: 1' indicator. The main content area shows a table with the following data:

SI 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	- View - Approve - Reject - Transfer

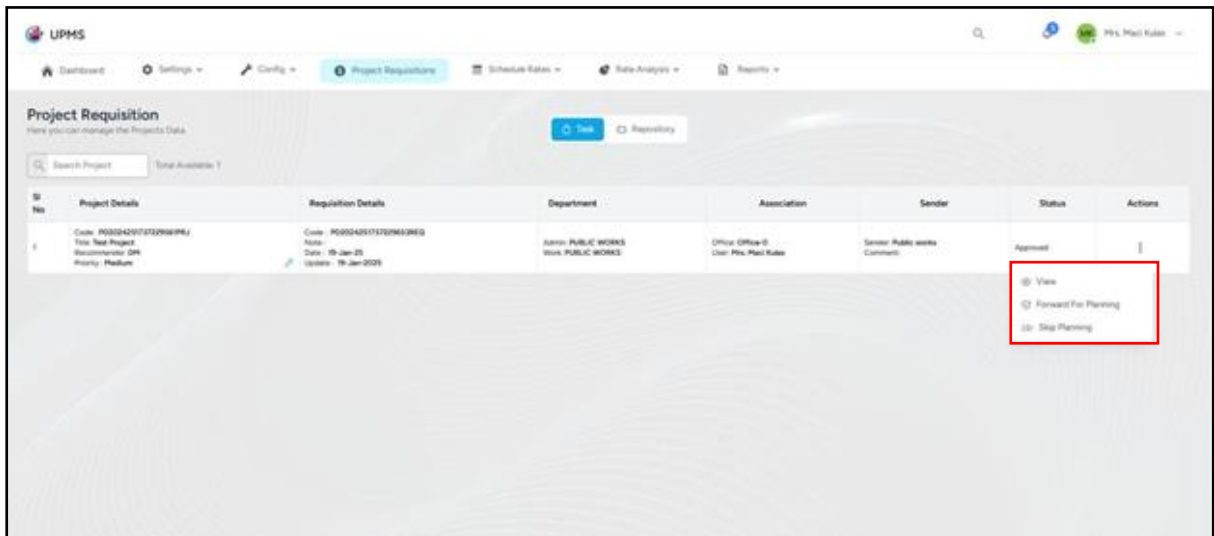
User can see the **Project Requisition Details** by clicking on the **View** from the Action button also.

The screenshot displays the 'Project Requisition Details' page in the UPMS application. The page has a top navigation bar with tabs like Dashboard, Settings, Config, Project Requisitions, Schedule Rates, Rate Analysis, and Reports. Below the navigation bar, there's a search bar and a 'Total Available: 1' indicator. The main content area shows a form with the following data:

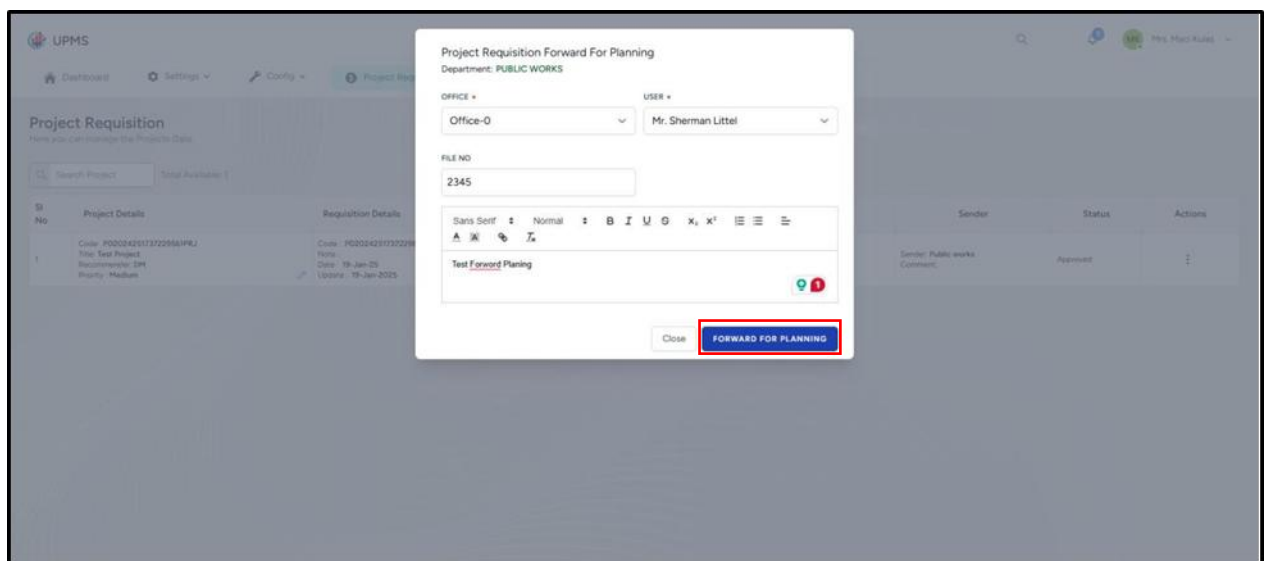
Project Information	
Name	Test Project
Description	dvq
Financial Year	2024-25
Project Mode	New
Admin Department	PUBLIC WORKS
Work Department	PUBLIC WORKS
Registration Date	19-Jan-25
Recommender	DM

UPMS Version 2.0

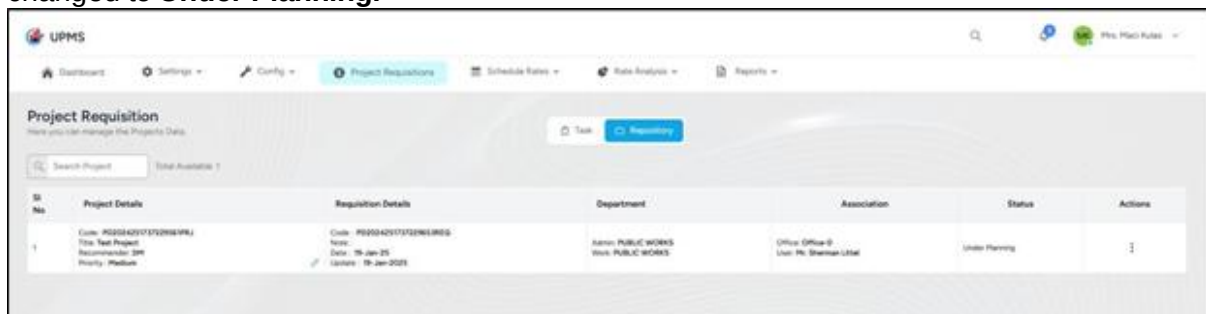
Now, Executive Authority have to forward this requisition to a **Project Planner** using **Forward to Planning** under Action button.



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.

The screenshot shows the 'Project Details' page in the UPMS 2.0 interface. The left sidebar contains a 'Guides' menu with options: Project Details, Checklist, Project Plan, Design, Estimates, and Workflows. The main content area is divided into two sections: 'Project Details' and 'Estimate Details'. The 'Project Details' section includes fields for Project Title (Test project Nadia), Date (21-Mar-25), Project Code (PD0024251742553953PRJ), Priority (Medium), and Recommender (District Magistrate). The 'Estimate Details' section includes fields for Estimate Code, Admin Department (PUBLIC WORKS), Work Department (IRRIGATION & WATERWAYS), and Stage (Under Planning). The top navigation bar shows the user is logged in as 'pp-Office Of Executive Engineer Nadia'.

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.

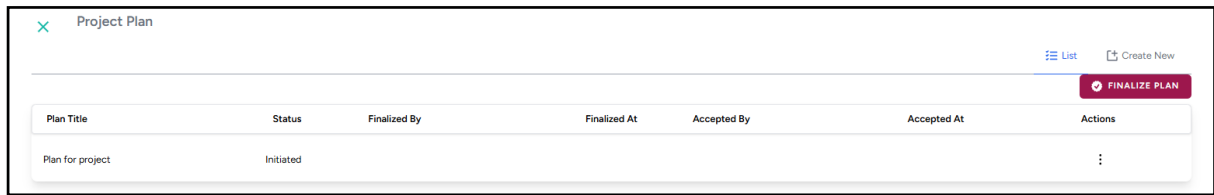
The screenshot shows the 'Project Plan' list page in the UPMS 2.0 interface. The left sidebar contains a 'Guides' menu with options: Project Details, Checklist, Project Plan, Design, Estimates, and Workflows. The main content area displays a table with columns: Plan Title, Status, Finalized By, Finalized At, Accepted By, Accepted At, and Actions. The table is currently empty, showing a message 'No Plans Found'. The top navigation bar shows the user is logged in as 'pp-Office Of Executive Engineer Nadia'.

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

The screenshot shows the 'Project Plan' form in the UPMS 2.0 interface. The left sidebar contains a 'Guides' menu with options: Project Details, Checklist, Project Plan, Design, Estimates, and Workflows. The main content area displays a form with fields for Plan Title (Plan for project), Upload Document (Document title, Document type, Prepared date, Uploaded document), and a 'Choose File' button. The top navigation bar shows the user is logged in as 'pp-Office Of Executive Engineer Nadia'.

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



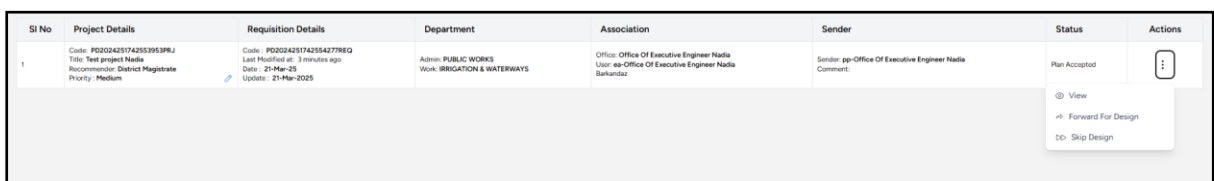
The screenshot shows a web interface for 'Project Plan'. At the top right, there are links for 'List' and 'Create New', and a red 'FINALIZE PLAN' button. Below is a table with the following columns: Plan Title, Status, Finalized By, Finalized At, Accepted By, Accepted At, and Actions. A single row is visible with the plan title 'Plan for project' and status 'Initiated'.

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.

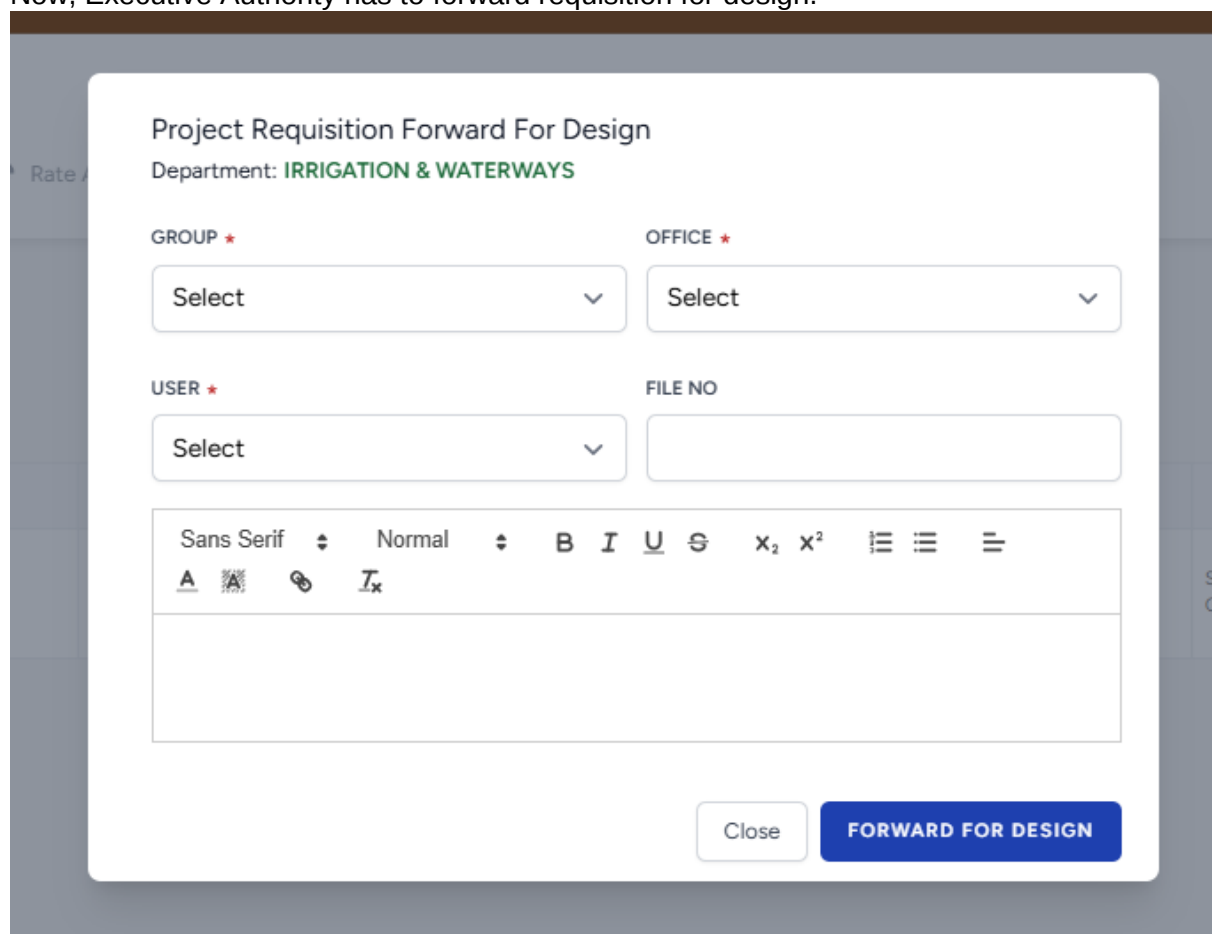
Now, Executive Authority has to approve the plan. After the approval the status will change to **Plan Accepted**.



The screenshot shows a table with columns: SI No, Project Details, Requisition Details, Department, Association, Sender, Status, and Actions. A single row is shown with status 'Plan Accepted'. A dropdown menu is open for the Actions column, showing options: View, Forward For Design, and Skip Design.

SI No	Project Details	Requisition Details	Department	Association	Sender	Status	Actions
1	Code: P0202425174255353PRJ Title: Test project Nadia Recommender: District Magistrate Priority: Medium	Code: P02024251742554277REQ Last Modified at: 3 minutes ago Date: 21-Mar-25 Updated: 21-Mar-2025	Admin: PUBLIC WORKS Work: IRRIGATION & WATERWAYS	Office: Office Of Executive Engineer Nadia User: aa-Office Of Executive Engineer Nadia Barkhatat	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 'IRRIGATION & WATERWAYS'. The form includes dropdown menus for 'GROUP', 'OFFICE', and 'USER', and a text input for 'FILE NO'. Below these is a rich text editor with various formatting options (Bold, Italic, Underline, etc.) and a text area. At the bottom, there are 'Close' and 'FORWARD FOR DESIGN' buttons.

Project Requisition Forward For Design
Department: IRRIGATION & WATERWAYS

GROUP * OFFICE *
Select Select

USER * FILE NO
Select

Sans Serif Normal B I U x_2 x^2 $\equiv$ $\equiv$ $\equiv$
A

Close FORWARD FOR DESIGN

UPMS Version 2.0

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

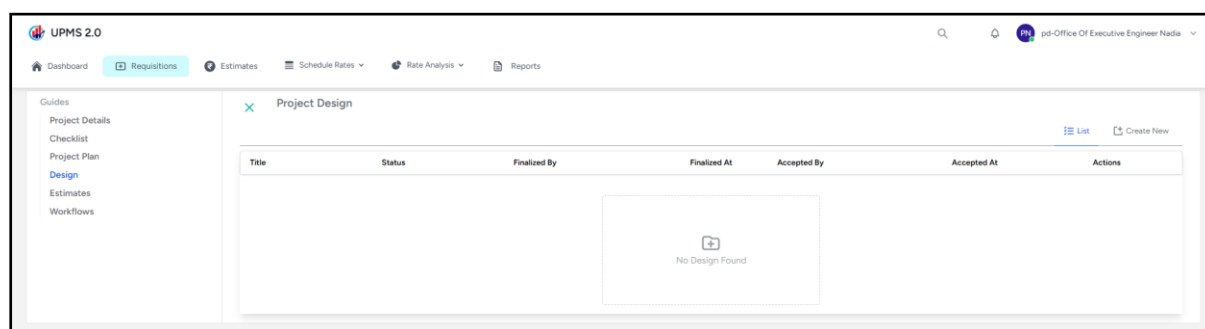
Then the requisition will send to project designer and the status will be changed to **Under Design**.

Project Requisition							
Here you can manage the Projects Data.							
Search Project Total Available: 1							
Sl No	Project Details	Requisition Details	Department	Association	Sender	Status	Actions
1	Code: PD020A251742553953PUJ Title: Test project Nadia Recommender: District Magistrate Priority: Medium	Code: PD020A25174255A2719EG Last Modified at: 10 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.

UPMS 2.0

Dashboard Requisitions Estimates Schedule Rates Rate Analysis Reports

Guides Project Details Checklist Project Plan Design Estimates Workflows

Project Design

Project Design Title

Document Title

Document Type

Prepare Date

Uploaded Document

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

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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". The department is set to "IRRIGATION & WATERWAYS". The form includes 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 these fields is a rich text editor with a toolbar containing options for font face (Sans Serif, Normal), bold, italic, underline, strikethrough, subscript, superscript, bulleted list, numbered list, and indent. The text area of the editor contains the placeholder text "Write comments...". At the bottom right of the form, 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.

The screenshot shows the UPMS dashboard with the 'Project Requisition' section. The table lists two requisitions:

Sl No	Project Details	Requisition Details	Department	Association	Sender	Status	Actions
1	Code: IW2024251741241626PRJ Title: test project title Recommender: MLA Priority: Medium	Code: IW2024251741241711REQ Last Modified at: 2 weeks ago Date: 06-Mar-25 Update: 06-Mar-2025	Admin: IRRIGATION & WATERWAYS Work: PUBLIC WORKS	Office: Office Of Executive Engineer Nadia User: ea-Office Of Executive Engineer Nadia EXECUTIVE ENGINEER (CIVIL) - II	Sender: ea-Office Of Executive Engineer Nadia Comment:	Estimate Initiated	⋮
2	Code: IN2024251741849655PRJ Title: ent envt envt Recommender: District Magistrate Priority: Medium	Code: IN2024251741849696REQ Last Modified at: 0 seconds ago Date: 13-Mar-25 Update: 13-Mar-2025	Admin: INDUSTRY COMMERCE AND ENTERPRISES Work: PUBLIC WORKS	Office: Office Of Executive Engineer Nadia User: ea-Office Of Executive Engineer Nadia EXECUTIVE ENGINEER (CIVIL) - II	Sender: ea-Office Of Executive Engineer Nadia Comment: ssp planning	Design Accepted	⋮

A context menu is open for the second requisition, showing options: View and Forward For Estimate.

Figure: 1

The form is titled 'Project Requisition Forward For Estimate' and is for the Department: PUBLIC WORKS. It contains the following fields:

- ESTIMATE APPROVAL CATEGORY: Select (dropdown)
- ESTIMATE TITLE: (text input)
- GROUP: Select (dropdown)
- OFFICE: Select (dropdown)
- USER: Select (dropdown)
- FILE NO: (text input)

Below the fields is a rich text editor with a toolbar (Bold, Italic, Underline, Link, Unlink, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent) and a text area labeled 'Write comments...'. At the bottom right are 'Close' and 'FORWARD FOR ESTIMATE' buttons.

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.

The screenshot shows the 'Bridge Project' details page. The left sidebar contains a 'Menus' section with links: Basic Details, Sanction Flow, WorkFlow, Document, Schedule Rate, and Estimate Items. The main content area is divided into three columns. The first column, 'Basic Details', contains 'Project Details' (Project Title: ert enwt ewr, Date: 13-Mar-25, Project Code: IN2024251741849655PRJ, Priority: Medium, Recommender: District Magistrate) and 'Requisition Details' (Code: IN2024251741849655REQ, Last Modified at: 4 minutes ago, Associated With: Office Of Executive Engineer Nadia, Associated To: ea-Office Of Executive Engineer Nadia, EXECUTIVE ENGINEER (CIVIL) - II). The second column, 'Estimate Details', contains Estimate Code: PD2024251742541673EST, Admin Department: INDUSTRY COMMERCE AND ENTERPRISES, Work Department: PUBLIC WORKS, and Stage: Initiated. The third column, 'Cost Details', shows Gross Amount: 0.00, Zero Only, Applied Charges (with an 'Add' button), and Net Amount: 0.00, Zero Only. A 'BACK' button is in the top right corner.

Figure: 1

The screenshot shows the 'Add Estimate Item' page. The top header includes the UPMS logo, navigation links (Dashboard, Requisitions, Estimates, Schedule Rates, Rate Analysis, Reports), and user information (je-Office Of Executive Engineer Nadia). The main content area has a 'BRIDGE PROJECT' header and a search bar. Below the search bar is a table with columns: SI No., Schedule Rate, Item Details, Quantity, Rate, Cost, and Actions. The table is currently empty, displaying 'No Estimate Items Found'. At the bottom, a summary bar shows Gross: ₹ 0.00, Charges: ₹ 0.00, and Net: ₹ 0.00. Buttons for 'All Items', 'New Items', 'VIEW', 'Estimate Verify', 'Filter Items', and 'Download' are visible.

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

UPMS

Dashboard Requisitions Estimates Schedule Rates Rate Analysis Reports

BRIDGE PROJECT

My fav list

DEPARTMENT: Public Works

SCHEDULE RATE CATEGORY: Select Schedule Rate Category

SCHEDULE RATE: Select ScheduleRate

ZONE: Select Zone

APPLY

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

UPMS

Dashboard Requisitions Estimates Schedule Rates Rate Analysis Reports

BRIDGE PROJECT

My fav list

DEPARTMENT: Public Works

SCHEDULE RATE CATEGORY: Road & Bridge (volume II)

SCHEDULE RATE: Chapter-17

ZONE: All districts of West Bengal and Darjeeling Plain

APPLY

Item No	Item Name	Unit	All districts of ...read more	Select Items
17.01.a Scheduled	Preliminary Investigation Notes Payment will be made after successful completion of work. Preliminary Investigation is mainly for collection of disturbed samples where deployment of heavy machineries is not involved. Show More	Ls	8000.00	☐
17.01.b Scheduled	Detailed Investigation Notes Payment will be made after successful completion of work. Preliminary Investigation is mainly for collection of disturbed samples where deployment of heavy machineries is not involved. Show More	Ls	25000.00	☐
17.02 ...	...	...	...	...

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

UPMS

Dashboard Settings Config Project Requisitions Schedule Rates Rate Analysis Reports

1	PUBLIC WORKS/Building(Volume I)/SECTION 1 A - BUILDING WORKS (A) EARTH WORK, ANTITERMITE TREATMENT Post Constructional Measures : Read More 11a) Anti-termite treatment to the outside of foundations with chemical emulsion by admixing chloropyrofos emulsifiable concentrates (1%concentration) with water by weight including cutting shallow channel by excavating soil along and close to the wall face en	1.0000	MTR	₹72.00	☐
2	PUBLIC WORKS/Building(Volume I)/SECTION 1 A - BUILDING WORKS (A) EARTH WORK, ANTITERMITE TREATMENT Post Constructional Measures : Read More 11b) Anti-termite treatment to the outside of foundation with chemical emulsion by admixing chloropyrofos emulsifiable concentrate (1% concentration) with water by weight, drilling 12mm. dia holes in concrete or masonry apron at an interval of 300mm. to a dept	1.0000	M	₹83.00	☐
3	PUBLIC WORKS/Building(Volume I)/SECTION 1 A - BUILDING WORKS (A) EARTH WORK, ANTITERMITE TREATMENT Post Constructional Measures : Read More 11e) Spot application for insecticides using Aqua base spray for pest (for bugs, cockroaches, silverfish, spider, termites, mosquitoes) to walls and ceiling etc. with chemical emulsion by admixing chloropyrofos emulsifiable concentrates (1% concentration) with	1.0000	SQ.M.	₹49.00	☐

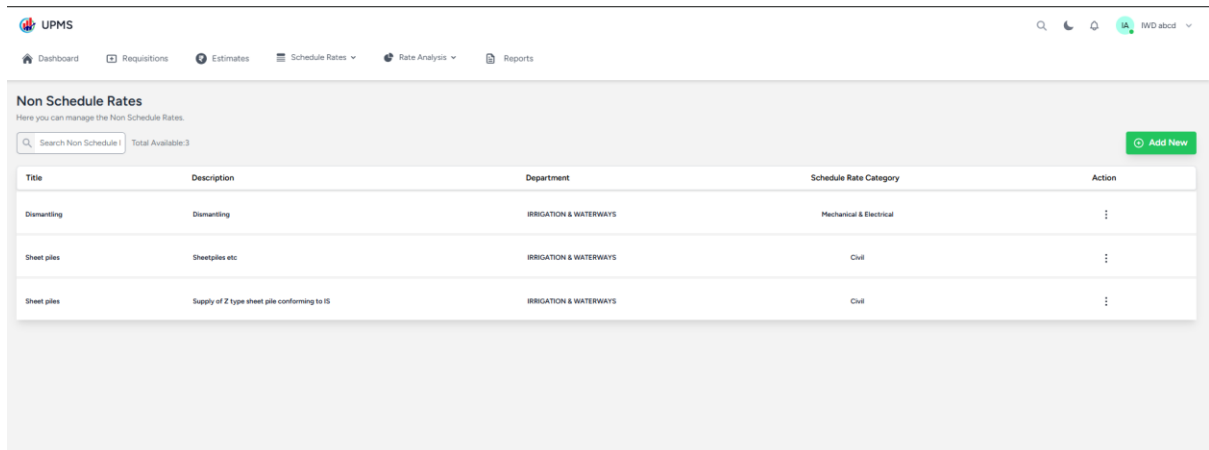
Add Non-schedule Item

Non-schedule Rate:

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

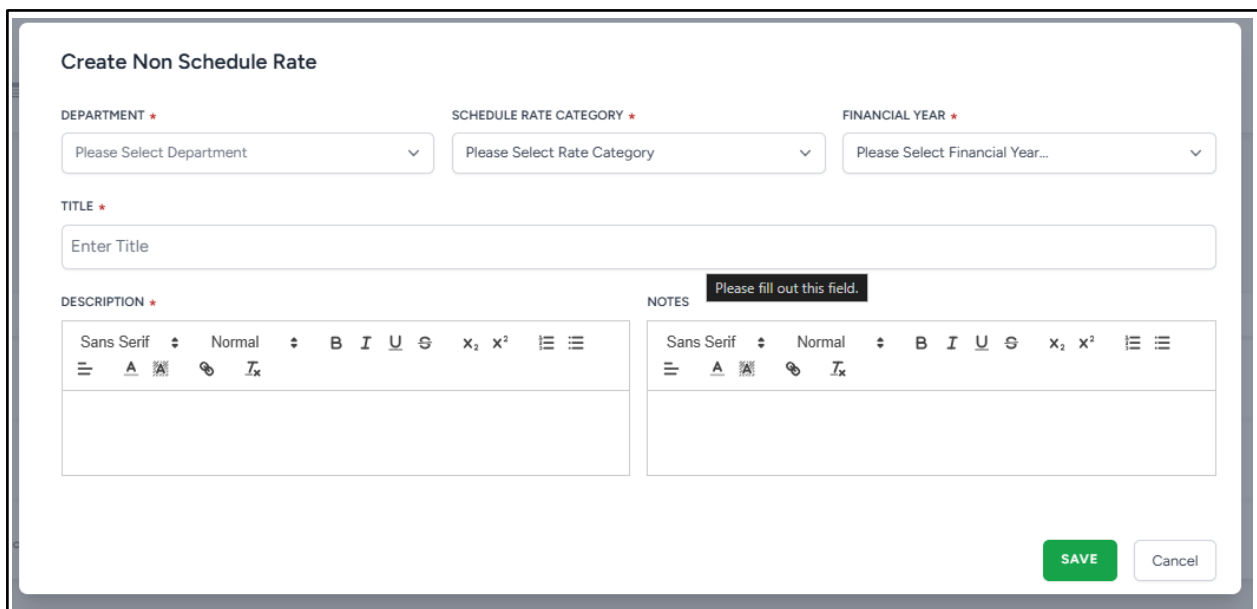
Access the Dashboard: Once logged in, the system will redirect you to the dashboard, which will be displayed on your screen.

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



Title	Description	Department	Schedule Rate Category	Action
Dismantling	Dismantling	IRRIGATION & WATERWAYS	Mechanical & Electrical	⋮
Sheet piles	Sheetpiles etc	IRRIGATION & WATERWAYS	Civil	⋮
Sheet piles	Supply of Z type sheet pile conforming to IS	IRRIGATION & WATERWAYS	Civil	⋮

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 *

Sans Serif

Normal

B

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x₂

x²

☰

☷

NOTES

Please fill out this field.

Sans Serif

Normal

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x₂

x²

☰

☷

SAVE

Cancel

After Non-schedule Rate save Add Zone and Add item

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Sheet piles Sheetpiles etc IRRIGATION & WATERWAYS Civil ⋮

Irrigation & Waterways (Civil)

Search Item code, Item Total Available: 3

Reset Filter Items

Sheet piles Select Zone Add Zone Add Item

Item No	Item Name	Unit	Zone-iv	ⓘ	⚠	Actions
---------	-----------	------	---------	---	---	---------

Create Non Schedule Zone

NAME * REF CODE

Enter Name Enter Reference Code

SAVE Cancel

Add zone name add click **save** button

Create Non Schedule Item

ITEM NAME

Enter Item Name

ITEM CODE * UNIT *

Enter Item Code Please Select Unit

Item Notes

Enter Item notes

SAVE Cancel

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

UPMS Version 2.0

Sheet piles Sheet piles etc IRRIGATION & WATERWAYS Civil

Irrigation & Waterways (Civil)

Search Item code, Item Total Available: 3 X Reset Filter Items

Sheet piles Select Zone + ADD -

Item No	Item Name	Unit	Zone-iv	Actions
A	Supply	MT	87500.00 Verified: 04-03-2025 13:05 PM Approved: 05-03-2025 11:51 AM	
B	AC	NO	32.00 Verified: -- Approved: --	
C	Supplementary item	EACH	Enter Rate Verified: -- Approved: --	

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.

UPMS je-Office Of Executive Engineer Nadia

Dashboard Requisitions **Estimates** Schedule Rates Rate Analysis Reports

BRIDAGE PROJECT +

All Items New Items VIEW

Schedule Item Non Schedule Item My fav list

Non Schedule Rates

DEPARTMENT: Irrigation & Waterways SCHEDULE RATE CATEGORY: Civil SELECT SCHEDULE RATES: Select Non Schedule Rate ZONE: Select Zone APPLY SELECTED (1)

Code	Item	Quantity	Unit	Zone-iv	Status	Select Items
A	Supply	1	MT	87500.00	Not Approved	☒
B	AC	1	NO	32.00	Not Approved	☐

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List of estimate items						
UPMS 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 Edit	₹ 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 Edit	₹ 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 Edit	₹ 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 Edit	₹ 9,500.00 LS	₹ 9500.00	+ -
7	IRRIGATION & WATERWAYS/Civil/Zone-IV	A) Supply	10000 N/A Edit	₹ 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

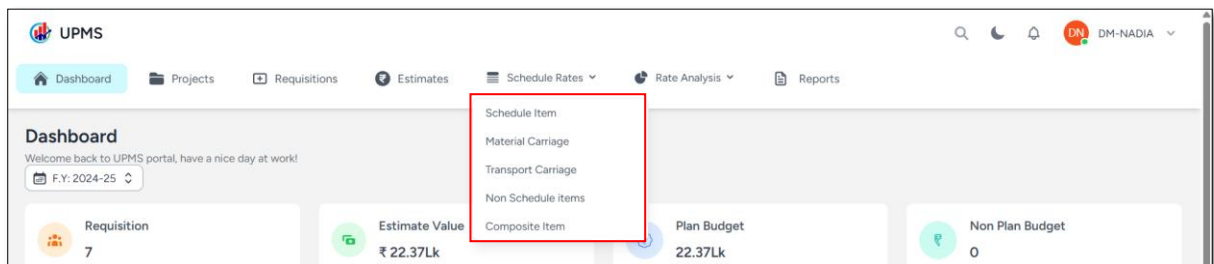
Schedule of Rates (SOR) – UPMS

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

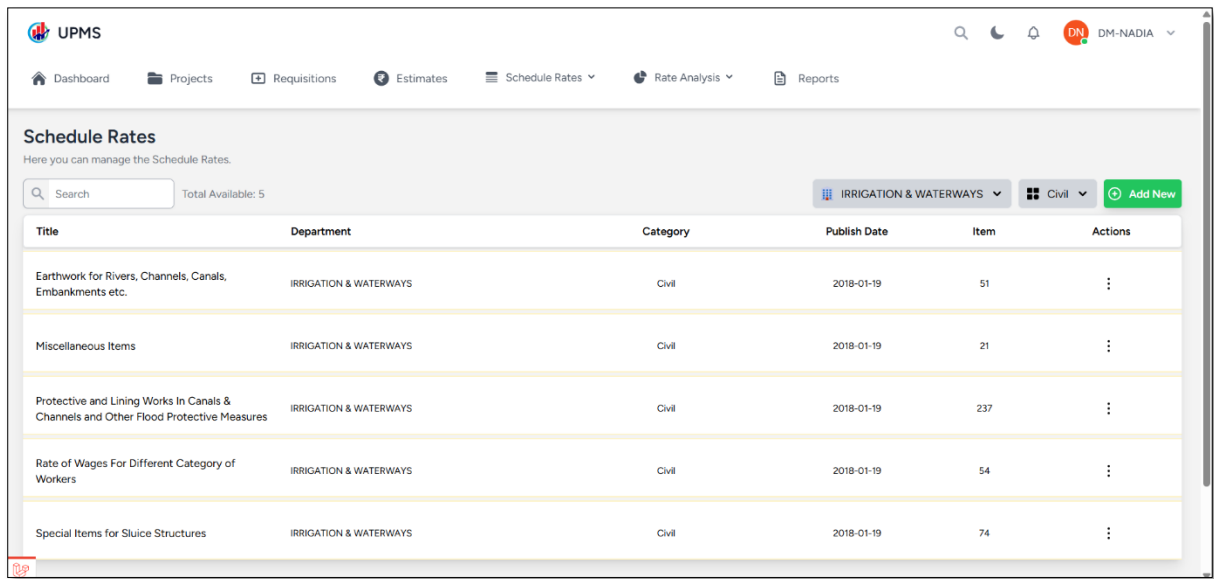
1. Go to dashboard select menu **Schedule Rates**, a dropdown will show four different types of SORs.

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



UPMS Version 2.0

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



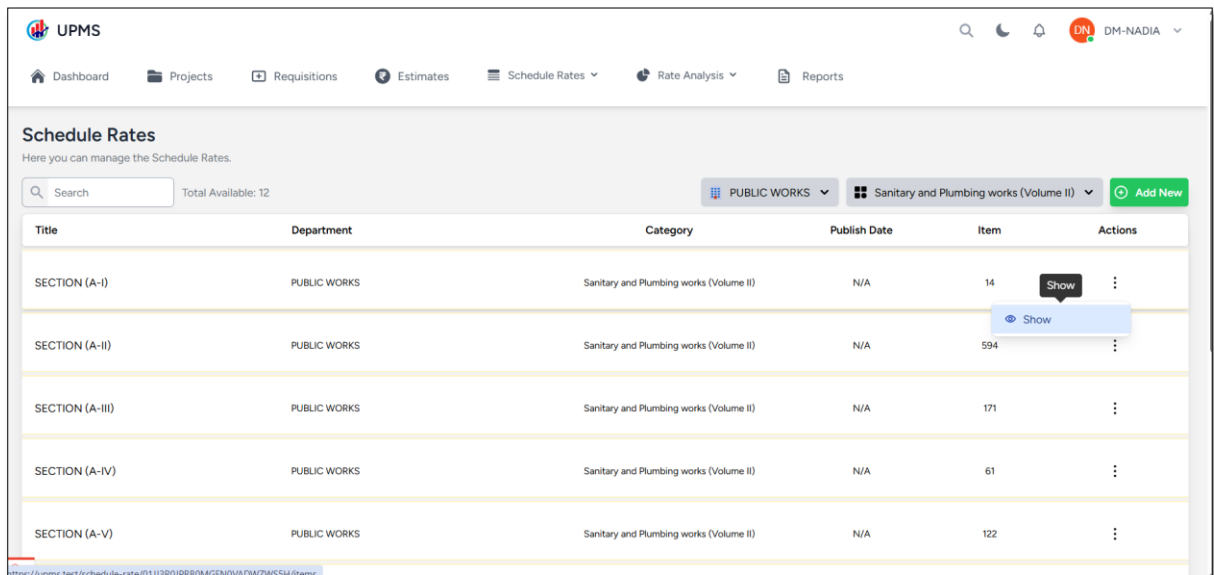
The screenshot shows the 'Schedule Rates' window in the UPMS application. The header includes the UPMS logo, navigation tabs (Dashboard, Projects, Requisitions, Estimates, Schedule Rates, Rate Analysis, Reports), and user information (DM-NADIA). The main content area is titled 'Schedule Rates' and includes a search bar and a 'Total Available: 5' indicator. A dropdown menu is set to 'IRRIGATION & WATERWAYS' and 'Civil'. The table below lists five items:

Title	Department	Category	Publish Date	Item	Actions
Earthwork for Rivers, Channels, Canals, Embankments etc.	IRRIGATION & WATERWAYS	Civil	2018-01-19	51	⋮
Miscellaneous Items	IRRIGATION & WATERWAYS	Civil	2018-01-19	21	⋮
Protective and Lining Works In Canals & Channels and Other Flood Protective Measures	IRRIGATION & WATERWAYS	Civil	2018-01-19	237	⋮
Rate of Wages For Different Category of Workers	IRRIGATION & WATERWAYS	Civil	2018-01-19	54	⋮
Special Items for Sluice Structures	IRRIGATION & WATERWAYS	Civil	2018-01-19	74	⋮

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.



The screenshot shows the 'Schedule Rates' window in the UPMS application. The header includes the UPMS logo, navigation tabs (Dashboard, Projects, Requisitions, Estimates, Schedule Rates, Rate Analysis, Reports), and user information (DM-NADIA). The main content area is titled 'Schedule Rates' and includes a search bar and a 'Total Available: 12' indicator. A dropdown menu is set to 'PUBLIC WORKS' and 'Sanitary and Plumbing works (Volume II)'. The table below lists five items:

Title	Department	Category	Publish Date	Item	Actions
SECTION (A-I)	PUBLIC WORKS	Sanitary and Plumbing works (Volume II)	N/A	14	⋮ Show
SECTION (A-II)	PUBLIC WORKS	Sanitary and Plumbing works (Volume II)	N/A	594	⋮
SECTION (A-III)	PUBLIC WORKS	Sanitary and Plumbing works (Volume II)	N/A	171	⋮
SECTION (A-IV)	PUBLIC WORKS	Sanitary and Plumbing works (Volume II)	N/A	61	⋮
SECTION (A-V)	PUBLIC WORKS	Sanitary and Plumbing works (Volume II)	N/A	122	⋮

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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:

- TITLE**: A text input field with placeholder 'Enter ScheduleRates title'.
- DEPARTMENT**: A dropdown menu with placeholder 'Please Select Department...'.
- SCHEDULE RATE CATEGORY**: A dropdown menu with placeholder 'Please Select Rate Category'.
- FINANCIAL YEAR**: A dropdown menu with placeholder 'Please Select Financial Year...'.
- PUBLISH DATE**: A date input field with placeholder 'mm/dd/yyyy' and a calendar icon.
- DESCRIPTION**: A rich text editor with a toolbar containing options like Sans Serif, Normal, Bold, Italic, Underline, Link, and text color.
- NOTES**: Another rich text editor with the same toolbar as the description field.

The background shows the 'Schedule Rates' page with a table listing various sections (A-I to A-V) and a green 'Add New' button.

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

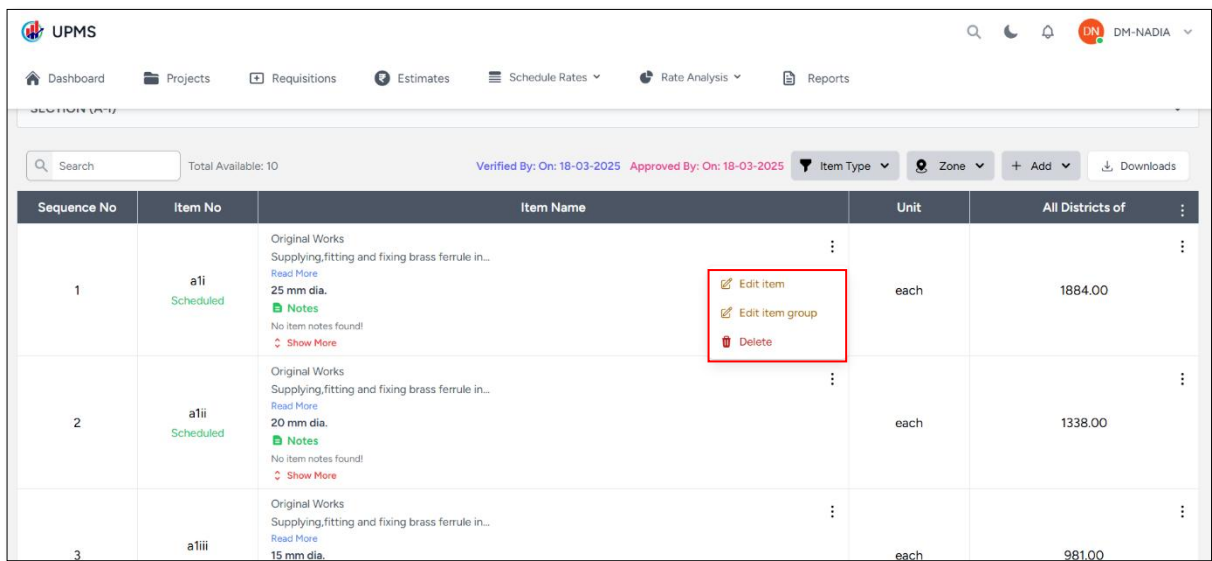
Table distribution shows the list of item of a schedule rate with its various zonal rates with all item details like sequence no, item no, item name, item unit, and the zones for the respective schedule rate.

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

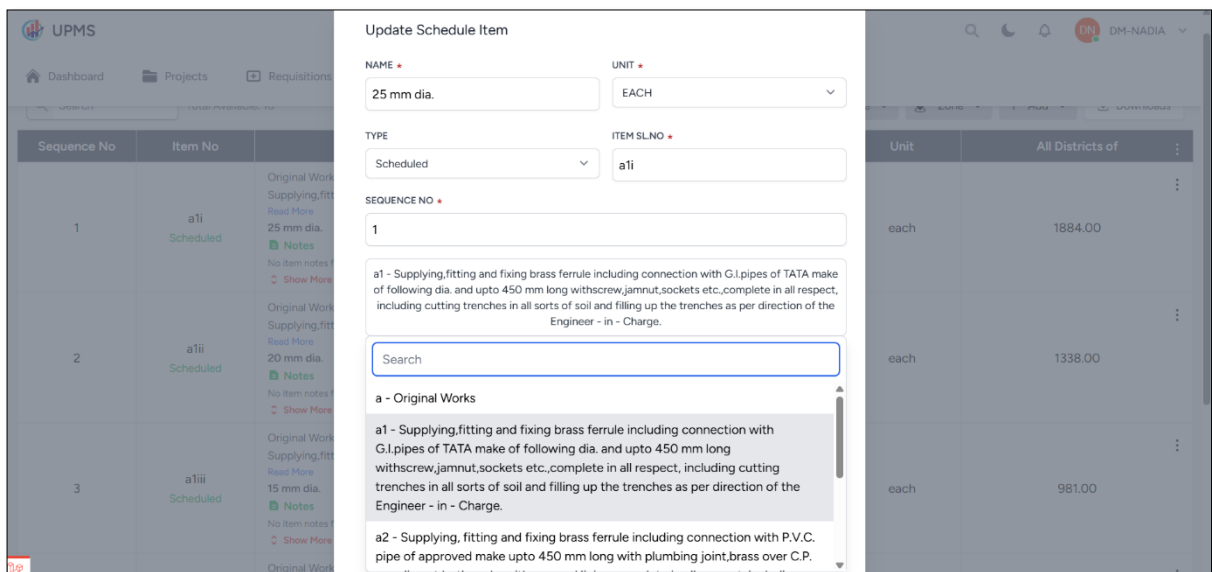


The screenshot shows the UPMS dashboard with a table of items. A red box highlights the 'Edit item', 'Edit item group', and 'Delete' options for the first item.

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. No item notes found!	each	1884.00
2	a1ii Scheduled	Original Works Supplying,fitting and fixing brass ferrule in... 20 mm dia. No item notes found!	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.



The screenshot shows the 'Update Schedule Item' form. The form includes fields for Name, Unit, Type, Item SLNO, and Sequence No. A searchable dropdown is shown for item groups, with 'a - Original Works' selected. The form also displays a detailed description of the item group.

Update Schedule Item

NAME: 25 mm dia. UNIT: EACH

TYPE: Scheduled ITEM SLNO: a1i

SEQUENCE NO: 1

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.

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.

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Update Item Groups

Select Item Group

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|

NAME * REF CODE *

Supplying,fitting and fixing brass ferrule including connection with C a1

SEQUENCE NO *

1

NOTES *

Sans Serif Normal B I U G x₂ x² [List Icon] [Align Icon] [Link Icon] [Unlink Icon]

Cancel SAVE

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.

SECTION (A-I)

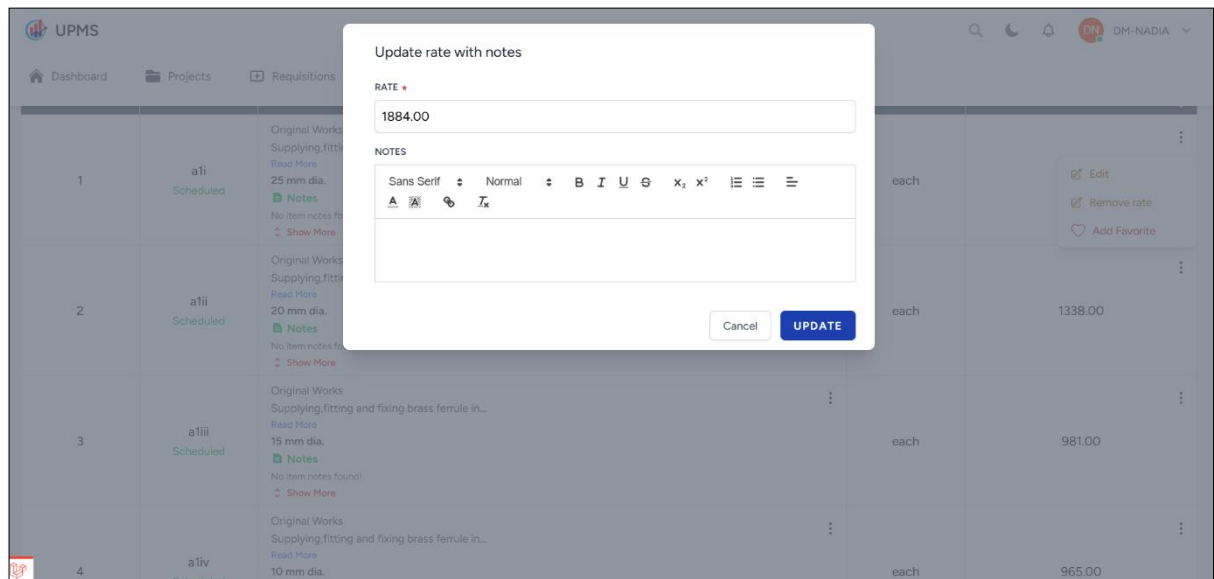
Search Total Available: 10 Verified By: On: 18-03-2025 Approved By: On: 18-03-2025 Item Type Zone + Add Downloads

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. No item notes found! Show More	each	1384.00
2	a1ii Scheduled	Original Works Supplying,fitting and fixing brass ferrule in... 20 mm dia. 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

Edit
Remove rate
Add Favorite

UPMS Version 2.0

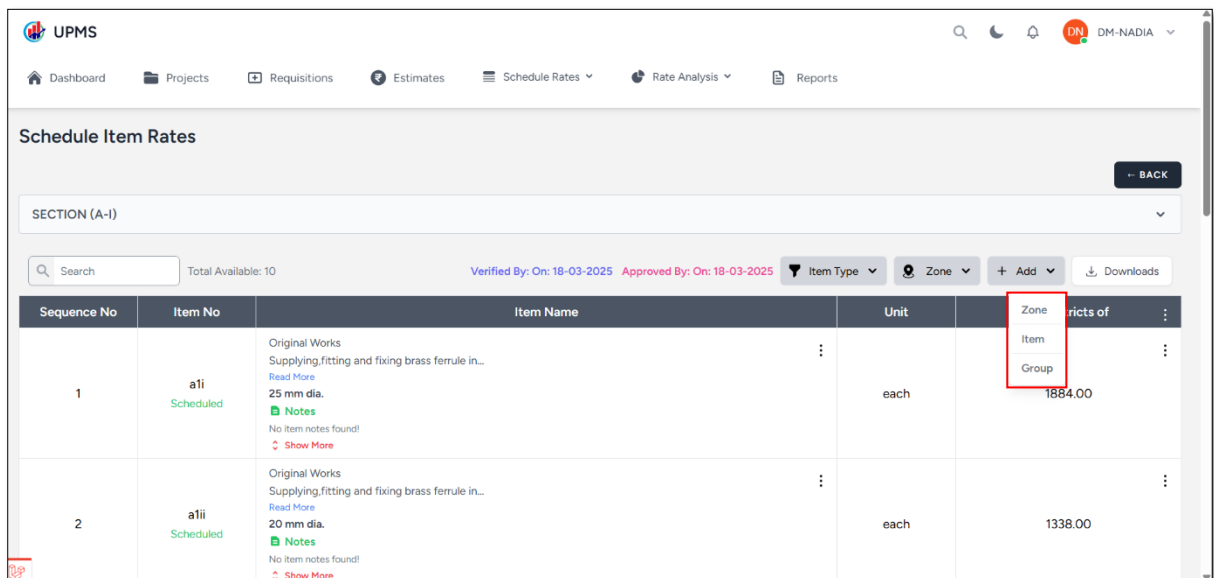
Clicking on edit button will open a popup to customize the rate for each zones of an item.



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.

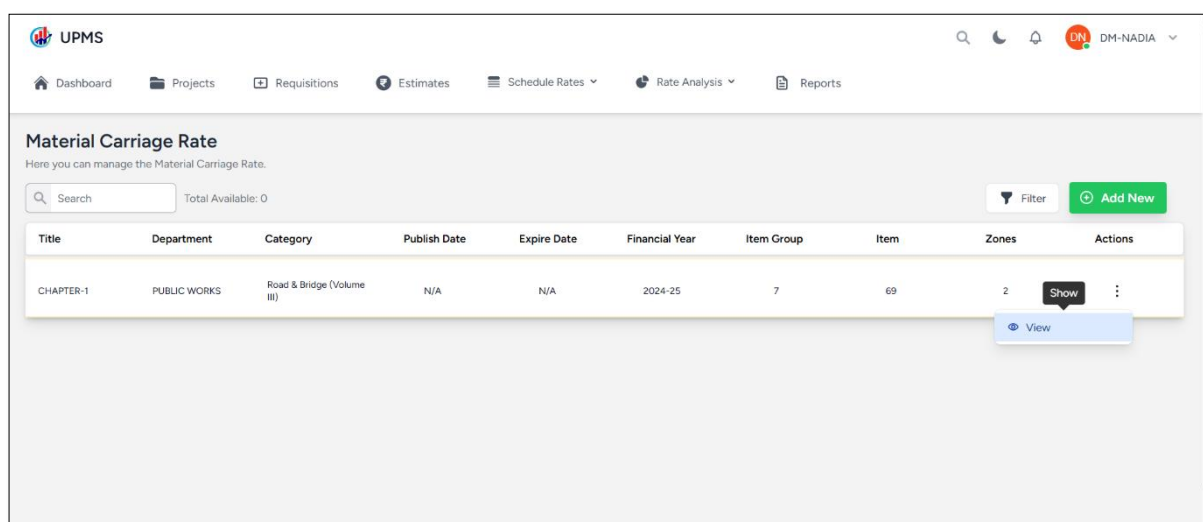


Download button will download the list as per the selection of zones.

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."

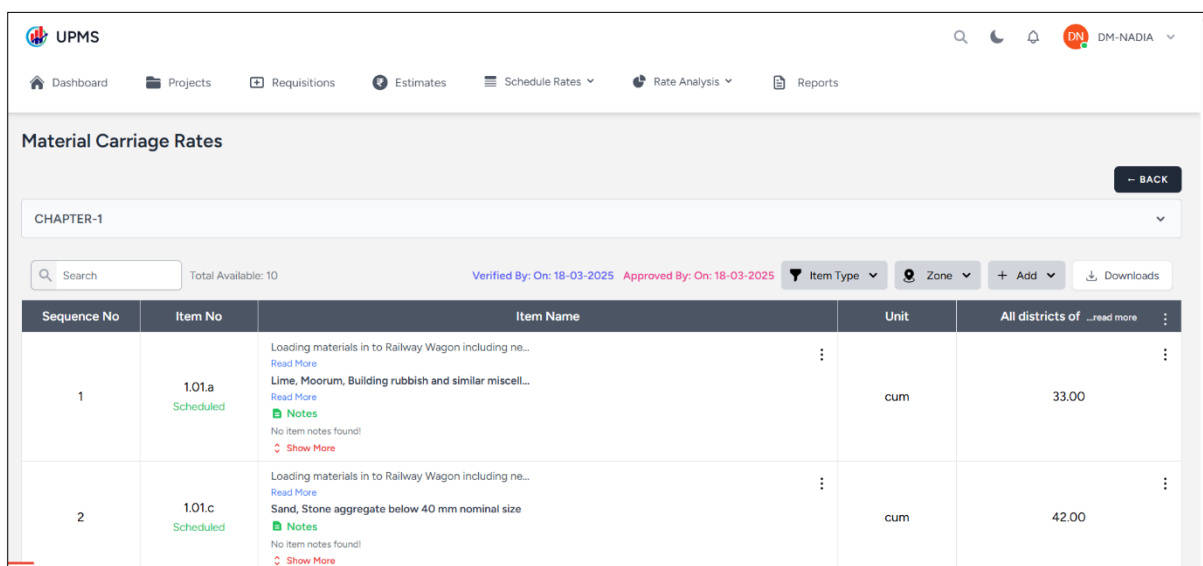
Clicking on **material carriage menu** from the schedule rate menu will open the window as shown below:



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.



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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.

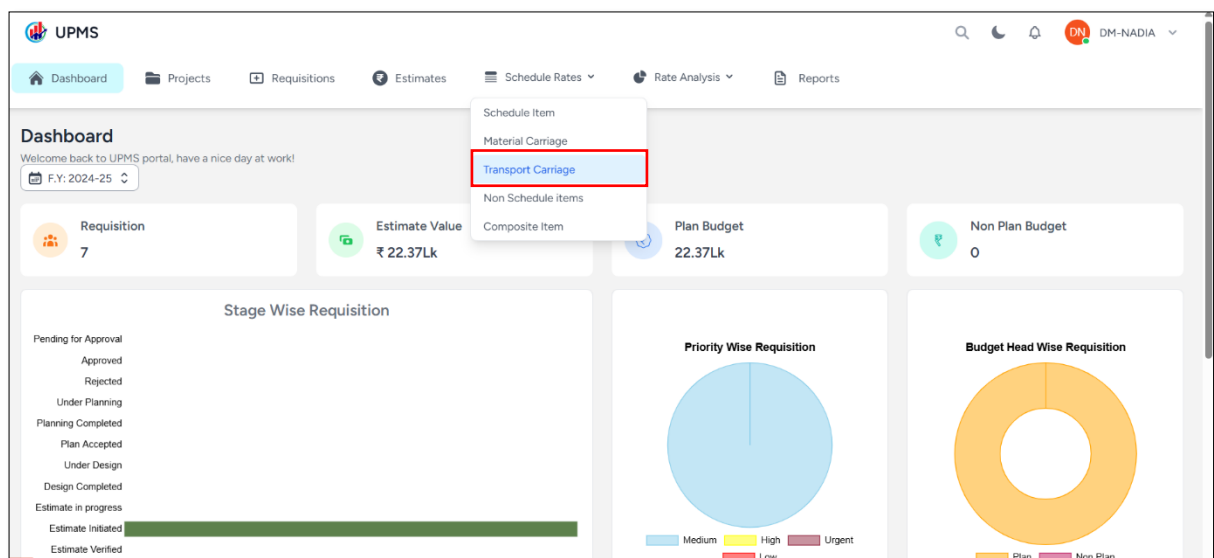
Sequence No	Item No	Item Name	Downloads
1	1.01.a Scheduled	Loading materials in to Railway Wagon including ne... Read More Lime, Moorum, Building rubbish and similar miscell... Read More Notes No item notes found! Show More	☐ All districts of West Bengal and Darjeeling Plain of Siliguri Sub-Division ☐ Darjeeling Hill Area Download Selected Zones Pdfs
2	1.01.c Scheduled	Loading materials in to Railway Wagon including ne... Read More Sand, Stone aggregate below 40 mm nominal size Notes No item notes found! Show More	cum 33.00

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.



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

Transport Carriage Rate
Here you can manage the Transport Carriage Rate.

Search: Total Available: 0 Filter Add New

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	
TABLE 2	PUBLIC WORKS	Road & Bridge (Volume III)	N/A	N/A	2024-25	4	2	

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:

Zone Wise Transport Carriage List
Department: Public Health Engineering

Search Item code/Item: Total Available: 1 Verified By: On: 18-03-2025 Approved By: On: 18-03-2025

Carrying charges of materials
Carrying charges of materials m.s. rod, d.i. pipe, g.i. pipe, tw materials, c.i.d.t. joints, a.c. coupling, brass strainer, h.d.p. strainer, a.c. pressure pipes, m.s. pipes etc. byroad from different stack yard to any places within west bengal including loading (upto a lead of 20 mtr. from loading point), packing, unloading and stacking charges etc. complete as per direction. [Read Less](#)

Select Zone Download

Item No	Item	Unit	All Zones Of West Be... Read More																								
SEC - C, Item-8(i)	M.S. Rod, D.I. Pipe,... (Scheduled) Read More	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>☒</td> <td>☐</td> </tr> <tr> <td>5-10 km</td> <td>24.87</td> <td>☒</td> <td>☐</td> </tr> <tr> <td>10-15 km</td> <td>23.20</td> <td>☒</td> <td>☐</td> </tr> <tr> <td>15-25 km</td> <td>19.84</td> <td>☒</td> <td>☐</td> </tr> <tr> <td>25-50 km</td> <td>15.68</td> <td>☒</td> <td>☐</td> </tr> </tbody> </table>	Distance Range	Rate	Per unit Distance Rate	Is Onward Distance rate?	0-5 km	44.42	☒	☐	5-10 km	24.87	☒	☐	10-15 km	23.20	☒	☐	15-25 km	19.84	☒	☐	25-50 km	15.68	☒	☐
Distance Range	Rate	Per unit Distance Rate	Is Onward Distance rate?																								
0-5 km	44.42	☒	☐																								
5-10 km	24.87	☒	☐																								
10-15 km	23.20	☒	☐																								
15-25 km	19.84	☒	☐																								
25-50 km	15.68	☒	☐																								

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**.

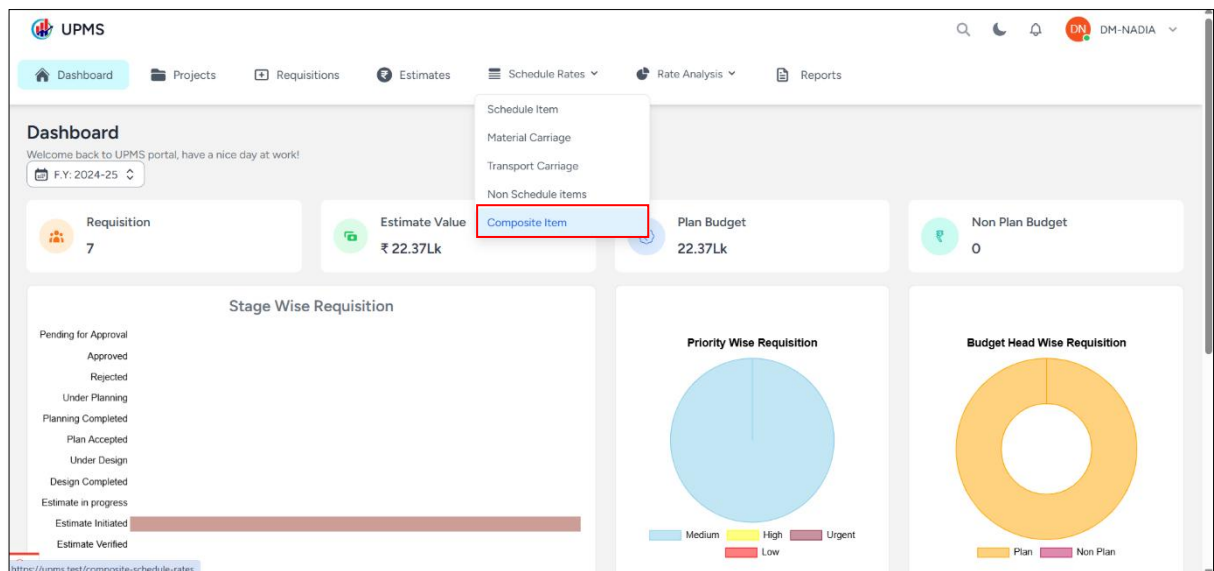
On the right end of table there is a dropdown to filter the zones and a button to download the transport carriage list in pdf format.

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.

The screenshot shows the 'Composite Rates' window. It includes a search bar, a 'Total Available: 1' indicator, and buttons for 'Composite Rate List' and 'Create Composite Rate'. The table below lists composite rates with columns: Title, Department, Category, Base Item, Composite Schedule Item, and Actions.

Title	Department	Category	Base Item	Composite Schedule Item	Actions
2.53 Cast-in-situ cement concrete blocks or lining units	IRRIGATION & WATERWAYS	Civil	0	0	⋮
TABLE 3.2-1	PUBLIC WORKS	Road & Bridge (Volume III)	206	633	⋮
TABLE 3.3-1	PUBLIC WORKS	Road & Bridge (Volume III)	81	349	⋮
CONSUMPTION OF MATERIALS	PUBLIC WORKS	Building(Volume I)	1	2	⋮

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:

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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' (selected), '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, italic, underline, link, unlink, text color, background color, and bulleted list.

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:

- 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'.
- Checkboxes**: A list of checkboxes for selecting specific items to be added to the composite rate. The items are:
 - ☐ 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).

UPMS

Dashboard

Projects

Requisitions

Estimates

Schedule Rates

Rate Analysis

Reports

Search

DM-NADIA

Dashboard

Projects

Requisitions

Estimates

Schedule Rates

Rate Analysis

Reports

Department: Public Works

Search Item code, Item

TABLE 3.2-1

Approximate quantities of materials required for design mix concrete Items... [Read More](#)

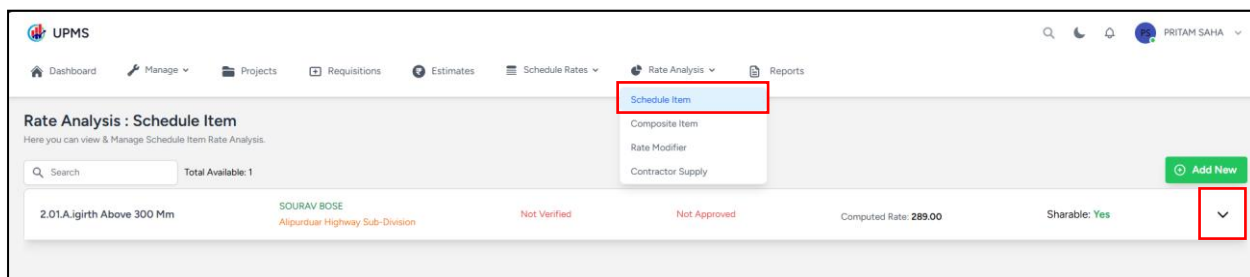
Verified By: On: 18-03-2025 Approved By: On: 18-03-2025

Item No	Base Item	Composed Item Details													
1	Bedding for Pipe 11.02.) Type A (Concrete Cradle) Bedding Laying concrete cradle bedding with M15 Grade Cement Concrete as per Clause 1105 (i) for Rural Roads of MORD	<table><tr><th>Composed Item</th><th>Unit</th><th>Quantity</th></tr><tr><td>Concrete Grade M-15 with cemen... Read More</td><td>KG</td><td>350.0000</td></tr><tr><td>Stone Chips 20 mm Read More</td><td>CUM</td><td>0.5400</td></tr><tr><td>Stone Chips 10 mm Read More</td><td>CUM</td><td>0.3600</td></tr></table>	Composed Item	Unit	Quantity	Concrete Grade M-15 with cemen... Read More	KG	350.0000	Stone Chips 20 mm Read More	CUM	0.5400	Stone Chips 10 mm Read More	CUM	0.3600	
Composed Item	Unit	Quantity													
Concrete Grade M-15 with cemen... Read More	KG	350.0000													
Stone Chips 20 mm Read More	CUM	0.5400													
Stone Chips 10 mm Read More	CUM	0.3600													
2	Providing and laying Pitching on slopes laid over prepared filter media includin... Read More 15.03.1) Cement Concrete Blocks of size 0.3x0.3 x0.3 m	View													

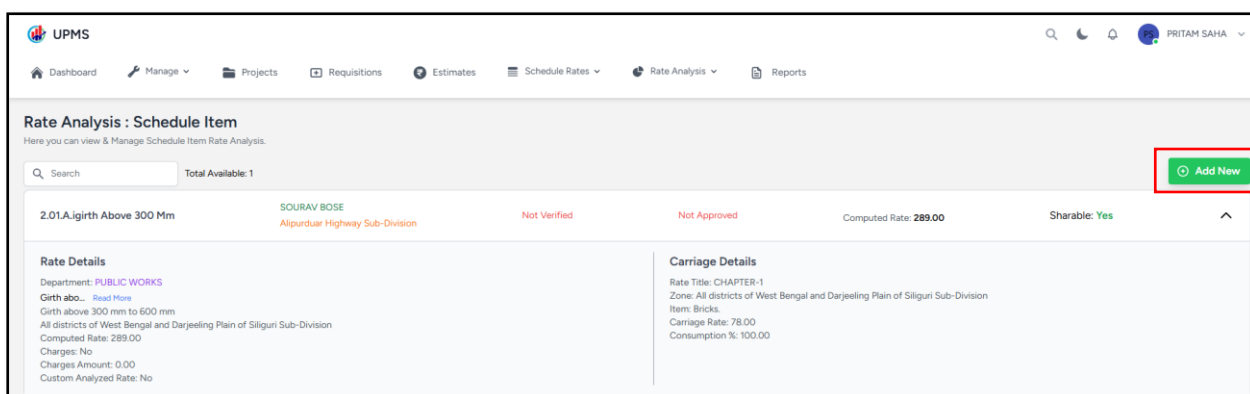
RATE ANALYSIS

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

- **Schedule Rate:**
Pick the specific schedule rate for the analysis from the dropdown.
- **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.
- Click on “**Next Step**”

UPMS

Dashboard Manage Projects Requisitions Estimates Schedule Rates Rate Analysis Reports

Rate Analysis : Schedule Item

Here you can view & Manage Schedule Item Rate Analysis.

List

Schedule-Item-Rate-Analysis-Details Add-Charge-And-Material-carriage-Rate

TITLE * Rate Analysis on Girth above 300 mm to 600 mm OFFICE * Baguihati Highway Sub-Division

DESCRIPTION

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

Girth above 300 mm to 600 mm for All districts of West Bengal and Darjeeling Plain of Siliguri Sub-Division

DEPARTMENT * PUBLIC WORKS SCHEDULE RATE CATEGORY * Road & Bridge (Volume III)

SCHEDULE RATE * CHAPTER 2 SCHEDULE ITEM * 2.01.A)-Girth above 300 mm to 600 mm

ZONE * All districts of West Bengal and Darjeeling Plain of Siliguri Sub-Division BASE RATE * 211.00

Next Step

On **Add-Charge-And-Material-Carriage-Rate** step here we can use **Base Rate** or we can use **Custom Rate Analysis**.

Base Rate: Base Rate which is given in SOR.

Custom Rate Analysis: All the complex type of analysis we are called as custom rate analysis like Contractor Supply Analysis.

- To use custom rate analysis click on “Customize Rate” toggle button.

Rate Analysis : Schedule Item

Here you can view & Manage Schedule Item Rate Analysis.

List

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	Base Rate: 211.00 Material Carriage: + Computed Rate: ₹ 211 No charges added Net Rate: ₹ 211.00	1 ⋮

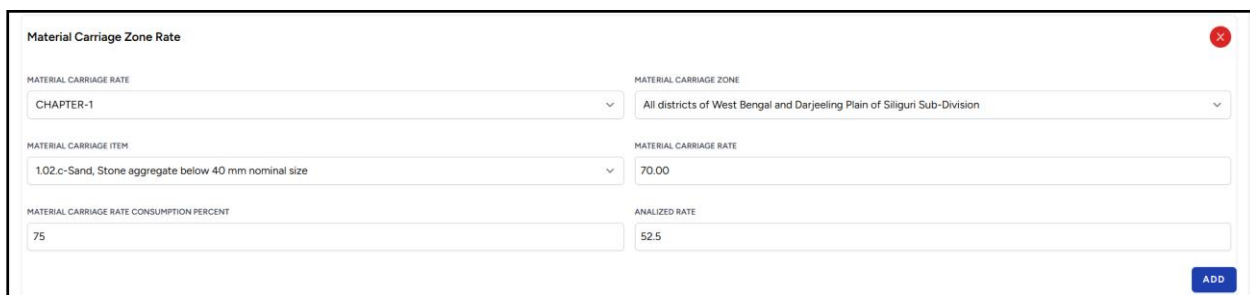
Customize Rate

Previous Step Save

- After clicking toggle button a pop up will appear.
- **Custom Rate:**
Enter the custom rate for the analysis.
- **Document Title:**
Provide the title for the document being generated or referenced.

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.



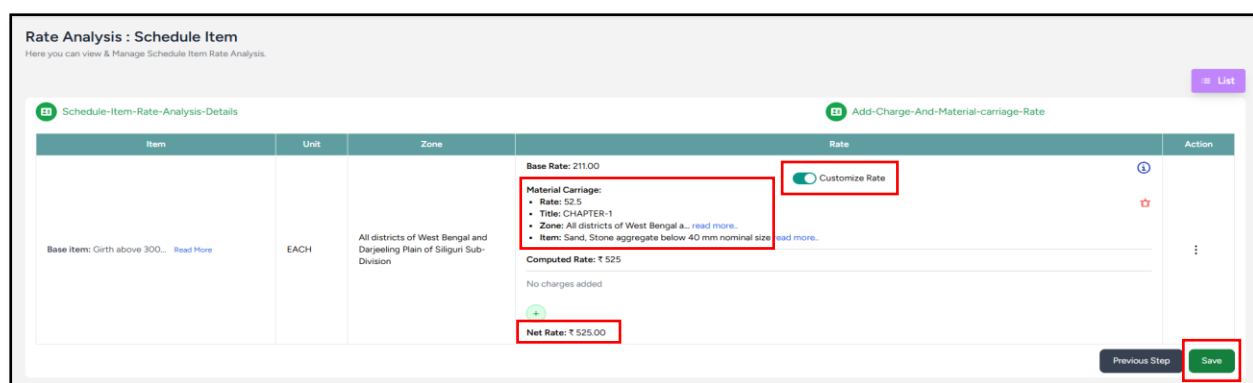
The form is titled "Material Carriage Zone Rate" and contains several input fields. It has a red close button in the top right corner and an "ADD" button in the bottom right corner.

MATERIAL CARRIAGE RATE	MATERIAL CARRIAGE ZONE
CHAPTER-1	All districts of West Bengal and Darjeeling Plain of Siliguri Sub-Division
MATERIAL CARRIAGE ITEM	MATERIAL CARRIAGE RATE
1.02 c-Sand, Stone aggregate below 40 mm nominal size	70.00
MATERIAL CARRIAGE RATE CONSUMPTION PERCENT	ANALIZED RATE
75	52.5

- **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.

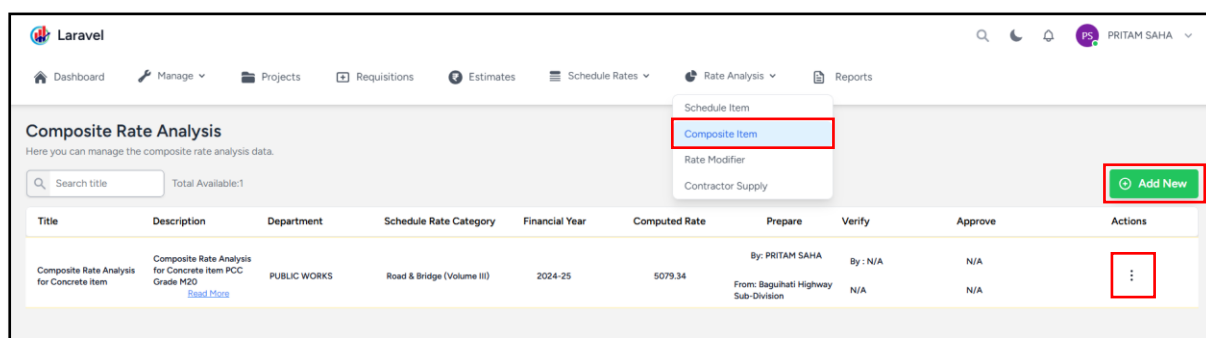
Click on Save Button the system will process the input and display a confirmation message.



The form is titled "Rate Analysis : Schedule Item" and contains a table with columns: Item, Unit, Zone, Rate, and Action. It has a "List" button in the top right corner and a "Save" button in the bottom right corner.

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	Base Rate: 211.00 Material Carriage: • 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... Computed Rate: ₹ 525 No charges added Net Rate: ₹ 525.00	Info Star More

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: 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

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: 581.00 Gross Rate: 582.84 No charges applied Computed Rate: 582.84	+
Composed Item: Stone Chips 10 mm	CUM	0.9600	Zone: Pabna	Base Rate: 431.00 Gross Rate: 154.80 No charges applied Computed Rate: 154.80	+
Composed Item: Concrete Grade M20 with cement type OPC 33 / PSC / PPC	MT	0.4000	Zone: Base Rate/11 (Supplied by Dept)	Base Rate: 6289.00 Gross Rate: 1,395.60 No charges applied Computed Rate: 1,395.60	+

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

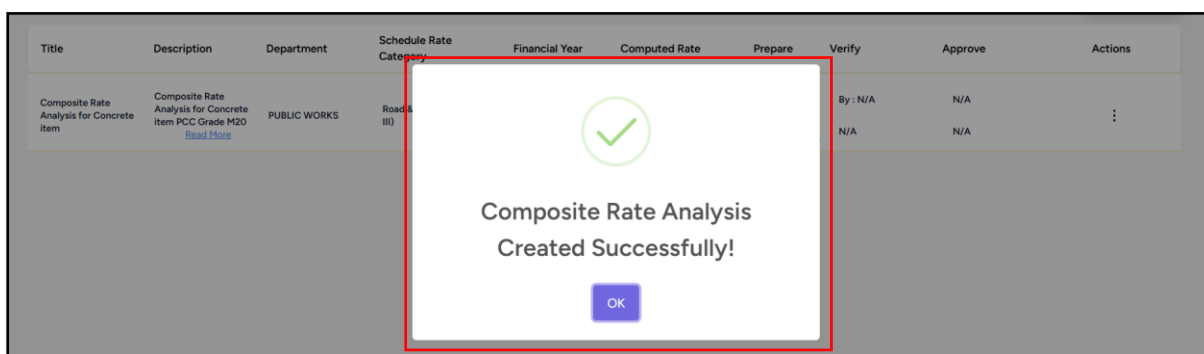
- **Consumption Percentage:**
 - **Purpose:** The user needs to specify the portion of the total carriage rate that corresponds to certain tasks, such as **Loading**, **Unloading**, and **Stacking**.
 - **Scenario:** If the material carriage rate includes **Loading**, **Unloading**, and **Stacking**, 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.

- 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.

- 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.

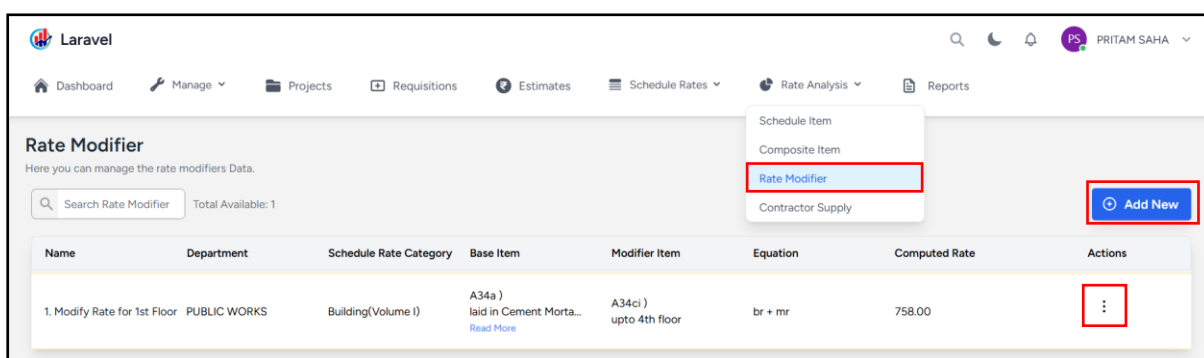
UPMS Version 2.0



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.

SECTION 1 C				
A34				
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... Read More Notes No item notes found! Show More	sq.m	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... Read More Notes No item notes found! Show More	sq.m	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 Read More Notes No item notes found! Show More	sq.m	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 *

Modify Rate for 1st Floor

OFFICE *

Baguihati Highway Sub-Divis

DEPARTMENT *

PUBLIC WORKS

SCHEDULE RATE CATEGORY *

Building(Volume I)

SCHEDULE RATES *

SECTION 1 C

GROUPS

A34 - 125 mm thick Autoclave aerated

ITEMS *

A34a - laid in Cement Mortar (1:6) -In S

ZONES *

Kolkata / 24 Pgs (N & S)/Area of Kalyan

BASE RATE

746.00

MODIFIER ITEMS *

A34ci - upto 4th floor

MODIFIER RATE

12.00

EQUATION *

br + mr

PREVIEW

746.00+12.00

CALCULATE

COMPUTED RATE

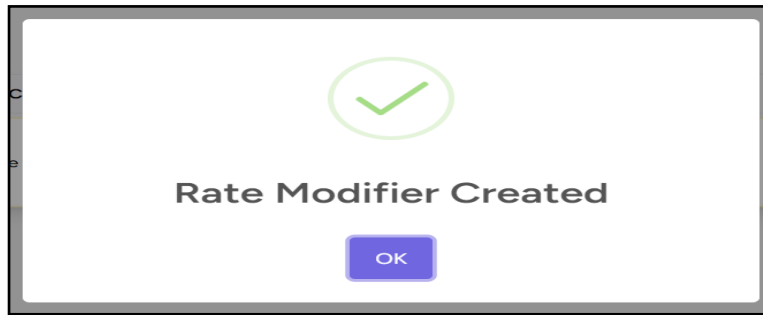
758

* 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.

Create New Rate Modifier

With Items

With Modifier

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

CALCULATE

COMPUTED RATE
770

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

Cancel SAVE

- 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.