

# Case study of

## a POC of an existing offline “Excel Bid tool” to Online “Bid application” for a Reputed Aircraft and Transportation Manufacturer

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The screenshot shows an Excel spreadsheet with a complex layout. It includes a header section with 'Region', 'Responsible Person', 'Date', and 'Status'. Below this, there are several data tables. One table is titled 'Onboard' and another 'Wayside'. The 'Onboard' table has columns for 'Year of delivery' (2010-2018) and 'Quantity per year'. The 'Wayside' table has columns for 'Year of delivery' (2010-2018) and 'Quantity per year'. There are also sections for 'Currency', 'Target Cost', and 'First Delivery'.



**In this project:**

- Information Architecture
- User & Task Analysis
- Task flow
- Wireframes



The screenshot shows a web-based application interface for 'Create a Bid'. It features a navigation bar with 'Home', 'Bids Overview', 'Create a Bid', 'Upload Existing Bid', 'Report', 'Bids Reference', and 'Site Actions'. The main form is titled 'Project Data' and includes sections for 'Project Details', 'Onboard / Wayside', and 'Others (Currency / Rate / Delivery Dates)'. The 'Project Details' section has fields for 'Project Name', 'ASN No.', 'Probability', 'Region/Country', 'Date', and 'Status'. The 'Onboard / Wayside' section has a dropdown menu. The 'Others' section has a dropdown menu. There are 'Create' and 'Reset' buttons at the bottom.

# 01 Understanding of requirement

- A key activity for personnel is creation and submission of bids for various equipments.
- The key roles for the process are Bid Analysts, Bid Engineers, Finance etc.
- Usually there are around 160-170 bids submitted during a year, each of which has a unique identifier number.
- **Today “As-Is” System:**

The current Procurement Bids tool is a excel template, used by bid engineers for capturing their requirements for onboard and wayside equipment needed for their projects. Each of these bids have a unique number, used to track the bid. The template is then sent to bid analysts who pull the prices from another database for each article requested in the Bid and update the template. The source of prices could be the pricing database or other external system. Finally, this Bid template is loaded into forecasting database for final processing, including summary, storage, key metrics and certain reports. There are formulas which help in preparing the summary of bid and generate necessary data for reporting purposes.
- **“To-be” Status:**

The proposed Electronic Bid Management Application is envisaged to automate the process to a large extent and make this process real time by hosting on a portal. The process flow will be largely same, but some of the functional activities carried out by different roles will change. In proposed system, the bid engineers will submit a web form for their equipment requirements and submit. Based on their needed article number, the pricing information will be updated from the information stored in the system. Finally, the Bid Application will baseline the BOM request and will generate the standard reports. The ad-hoc reports can be generated by providing key inputs to the system.



## 02 Key Targets

Key pain points that team currently faces, to define an online bid management application:

- reduce manual work
- Improve bids responsiveness
- Information & Data Security
- Strong role based accesses
- Lack of ease of Reporting
- Memory leaks and other technical environment problems.

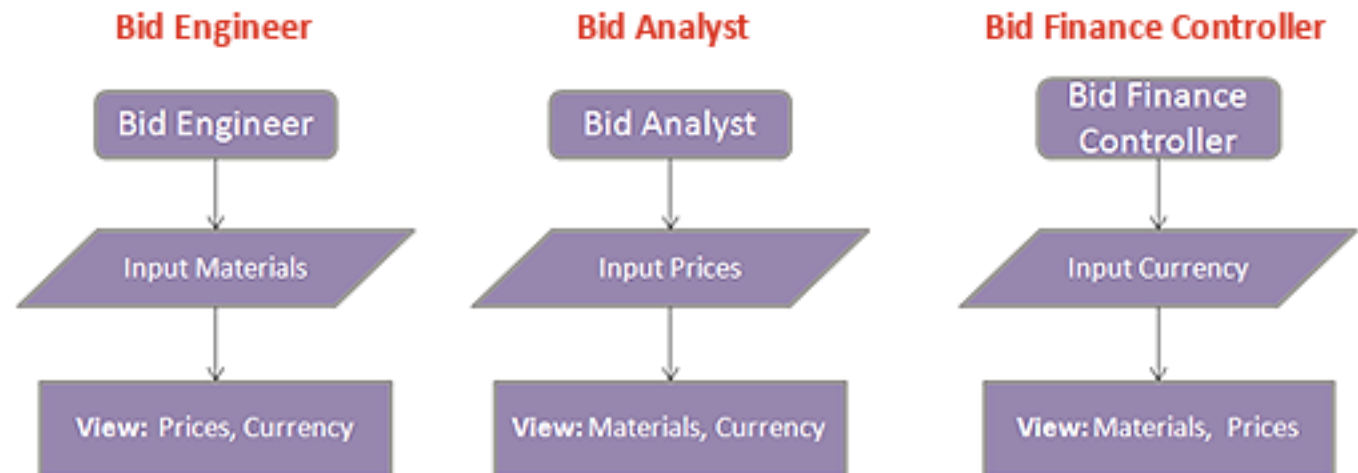
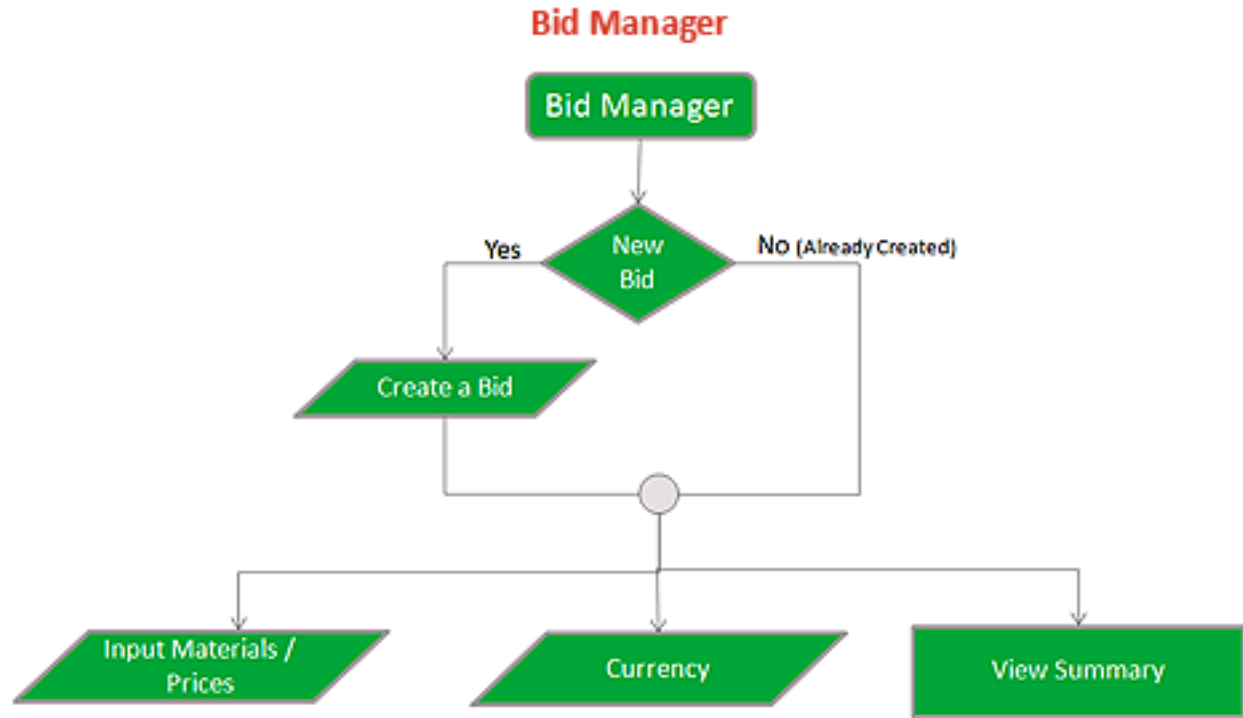


# 03 User Groups & Primary Tasks Identified

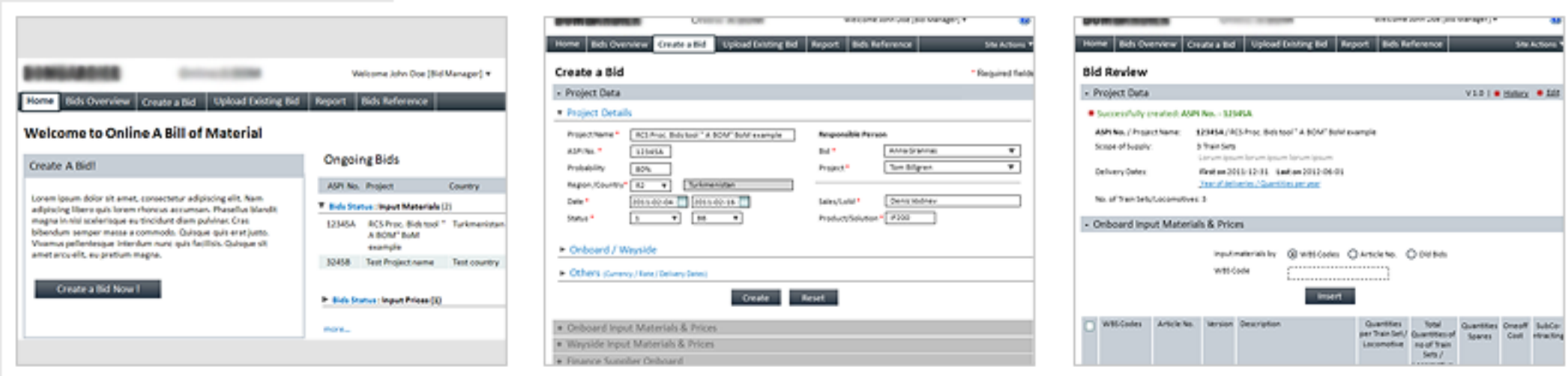
- Bid Manager
  - creates a new bid by assigning a unique ASPI number
  - may play the role of entering technical details, Price & Currency
  - able to view different types of reports like BOM Summary
- Bid Engineer
  - enters all technical details for the project, including list of equipment required and submits
- Bid Analyst
  - starts entering the price and vendor information for the equipment
- Bid Finance Controller
  - starts declaring the currency and rate for the respective projects



# 04 User Task Flow Diagrams



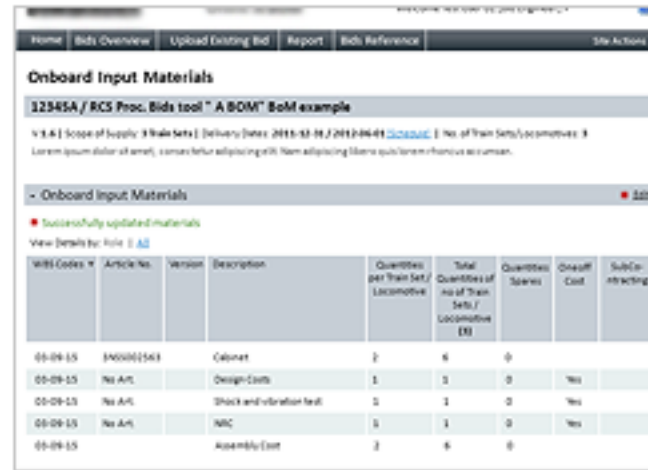
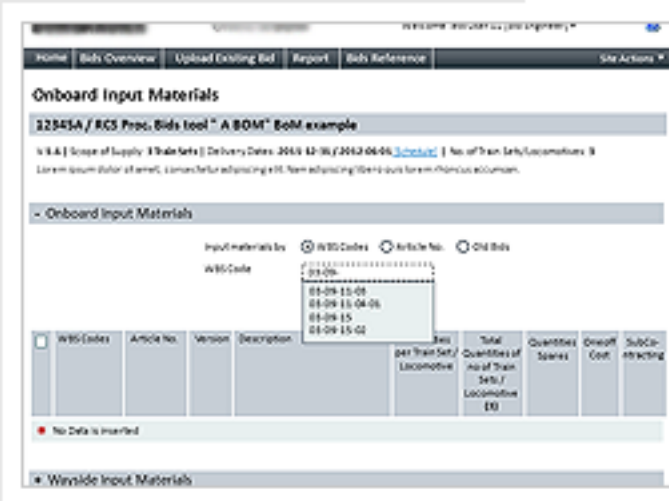
# 05 Wireframes for Bid Manager role:



- Landing page:
  - provided with respective content based on their role
  - Bids Overview is provided for performing tasks effectively
- Create a Bid page:
  - Help text: “Required Fields” is shown
  - The other bars “Onboard Input Material.., Wayside Input...” etc are disabled until a project data is created.
- Bid Review page:
  - Version, History and Edit (project Data) options are shown only after a Bid has been created
  - “Feedback” (Success message) is shown

# 06

## Wireframes for Bid Engineer role:



- Title & Summary of bid:

- The created Bid title with unique number is shown at the top
- The summary with version carries the suffice info required to an engineer to proceed

- Smart Lookup:

- WBS Code is shown in smart lookup, which enables user to input data faster

- Onboard Material Grid:

- the default Grid shows info relevant to Bid Engineer role with provision "View Details" by "Role" or "All"
- "View All" shows all details with Pricing details in Grid using Scroll

- Thus the workflow for all 4 roles are clearly depicted with intuitive and ease of interaction
- The workflow is enacted into a High-level Prototype with sample values for demo purpose
- The HTML proto is explained with a guide to rationale the interaction and flow

### The feedback is:

“ BTW- have to acknowledge the way the POC workflows are being worked on – and how the clickable prototype is coming through.

*I think it's one of the very best we've done in recent times.*

*Waiting for Krishna to finish the same, a few more hours should do it. ”*

- Joydeep Mitra  
UX Delivery Co-ordinator