UPMS

National e-Governance Division
Ministry of Electronics & Information Technology
Government of India

GOVERNMENT OF INDIA

UPMS

Unified Project Management System

Better Projects.
Stronger India.

User Manual

Complete Portal Workflow Guide — From Registration to Project Closure

Your guide to managing projects efficiently



PREPARED FOR

- Program Divisions
- Principal Investigators
- Review Committees
- Ministries & Departments

Portal URL: **upms.meity.gov.in**

Prepared and developed by the UPMS Programme Management Team

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1. Introduction — What is UPMS?

UPMS (Unified Project Management System) is one online portal that manages a government-funded project from start to finish. It manages the complete lifecycle of research and development projects. Instead of paper files/manual processing, emails, and separate spreadsheets, everything happens in one place: publishing a call for proposals, applying as a researcher, reviewing and approving a proposal, and tracking a live project all the way to closure.

The portal has three connected parts. The Portal is the outward-facing side that researchers and granting agencies use to apply and track proposals. The Dashboard gives real-time analytics for monitoring and decision-making. The ERP manages the full project lifecycle, from the first proposal to final closure.

Why UPMS Makes Life Easier

- **One login for life — Principal Investigators register once and never fill the same form twice.**
- **Role-based dashboards — every user sees only what is relevant to their role.**
- **Real-time project tracking — no more waiting on email updates.**
- **A standard proposal-to-closure flow — every proposal follows the same clear path.**
- **Built-in CFP creation, evaluation, and approval workflow.**
- **Fund utilisation and financial monitoring in one screen.**
- **Milestone and deliverable tracking for every ongoing project.**

2. Who Does What — Roles in UPMS

Every stage of the UPMS journey is driven by a specific role. Knowing who does what will help you follow the right section of this manual.

Role	What They Do
System Administrator (SA)	Registers via Parichay or Digi Locker. Assigned by the UPMS Support Admin team. Assigns Program Division (PD) users for their ministry/department.
Program Division (PD)	Creates Calls for Proposals (CFPs), reviews and approves proposals, forms review groups (Scrutiniser / Reviewer / Meeting Group / PRSG), and monitors ongoing projects.
Program Officer (PO)	Registers via Parichay or Digi Locker. Reviews assigned CFPs, monitors approved projects, verifies progress and expenses, and submits recommendations.
Principal Investigator (PI)	Registers via Parichay or Digi Locker. Applies to a CFP with a full proposal, and after approval, submits deliverables and expenses for the project.
Scrutiniser	Conducts the first check of every submitted proposal, rejects proposals that are not eligible, and forwards shortlisted proposals to the Reviewer.
Reviewer	Reviews shortlisted proposals in detail, records evaluation remarks and a recommendation, then forwards the proposal to the Meeting Group (MG).
Meeting Group	A review committee that discusses the proposal, records Minutes of Meeting, and issues a final recommendation before sanction.
Meeting Agenda	Prepare the meeting (PI and committee) for the selected proposals.
Project Review & Steering Group (PRSG)	Reviews each deliverable submitted during the project and steers the project through its lifecycle, meeting-by-meeting.

3. The Onboarding Journey at a Glance

A project moves through seven broad stages on UPMS, from a user's first registration to a fully closed project.



STEP 1 - Login & Registration

Every UPMS journey starts here. This step shows you how to sign in and create your account, so you can reach the screens that match your role.

User Role & Pre-requisites

User Hierarchy	What You Need Before Starting
All Users (first-time and returning)	• A Digi Locker or Parichay account, or a valid email ID and password • An active internet connection • A registered mobile number for OTP verification (Digi Locker/Parichay)

Step-by-Step Walkthrough

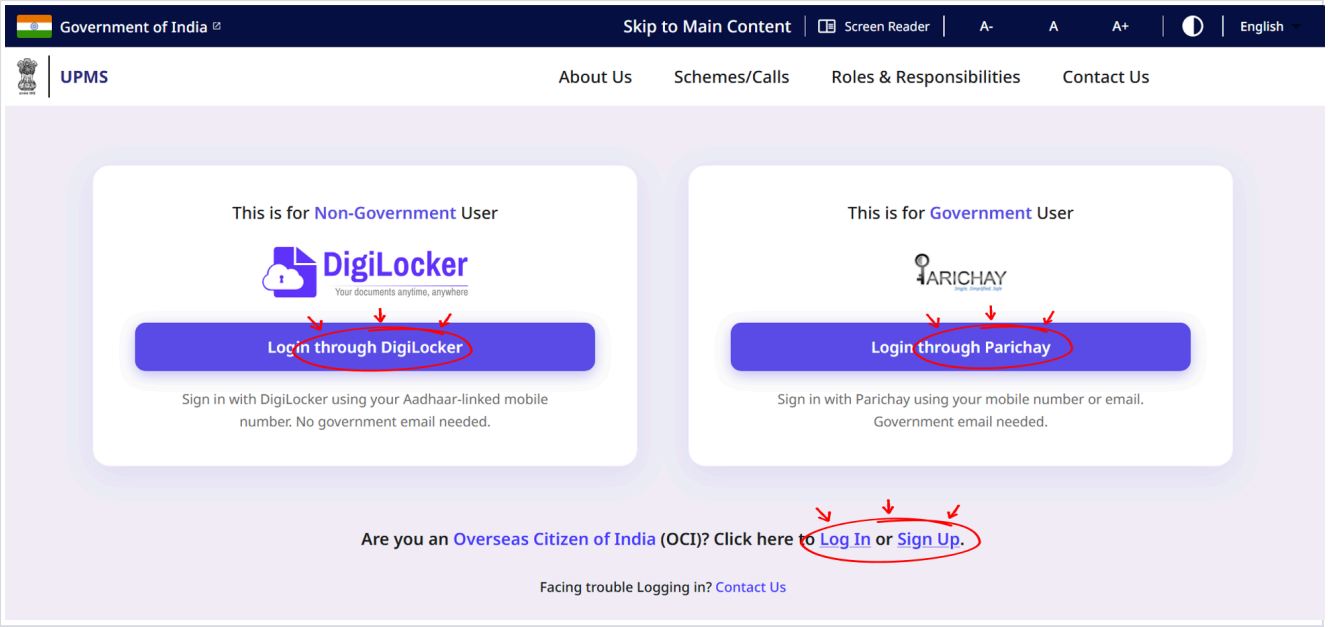


Fig. 1 — The UPMS login screen, with DigiLocker login on the left, Parichay login on the right and OCI login at bottom

1. Open the UPMS Portal

Go to upms.meity.gov.in in your browser and look for the Login/Sign-Up button in the top-right corner.

> 💡 *What happens: The portal displays two login options — DigiLocker for Non-Government Users and Parichay for Government Users.*

2. Choose How You Want to Sign In

For Non-Government Users: Click “Login through DigiLocker” and sign in using your Aadhaar-linked mobile number.

For Government Users: Click “Login through Parichay” and sign in using your registered mobile number or email.

> 💡 *What happens: DigiLocker or Parichay opens its respective secure authentication process for completing the login. .*

3. Complete the Authentication

Enter the required credentials/details and complete the authentication process on DigiLocker or Parichay.

> 💡 *What happens: You land on your role's Overview screen. By default, every new user is assigned the Principal Investigator (PI) role.*

4. Overseas Citizen of India (OCI) Users

If you are an Overseas Citizen of India (OCI), use the "Log In" or "Sign Up" option provided below the main login options.

> 💡 ***What happens:*** *OCI users can either log in using their existing credentials or register for a new account through the OCI-specific option*

5. Overseas Citizen of India (OCI) Registration

If you are an Overseas Citizen of India (OCI), click the "Log in" or "Sign Up" option provided under the OCI section to login/register for a new account.

> 💡 ***What happens:*** *The OCI login/registration page opens, where you can complete the login/registration process by providing the required details. If you already have an account, select "Sign In" to log in using your existing OCI credentials.*

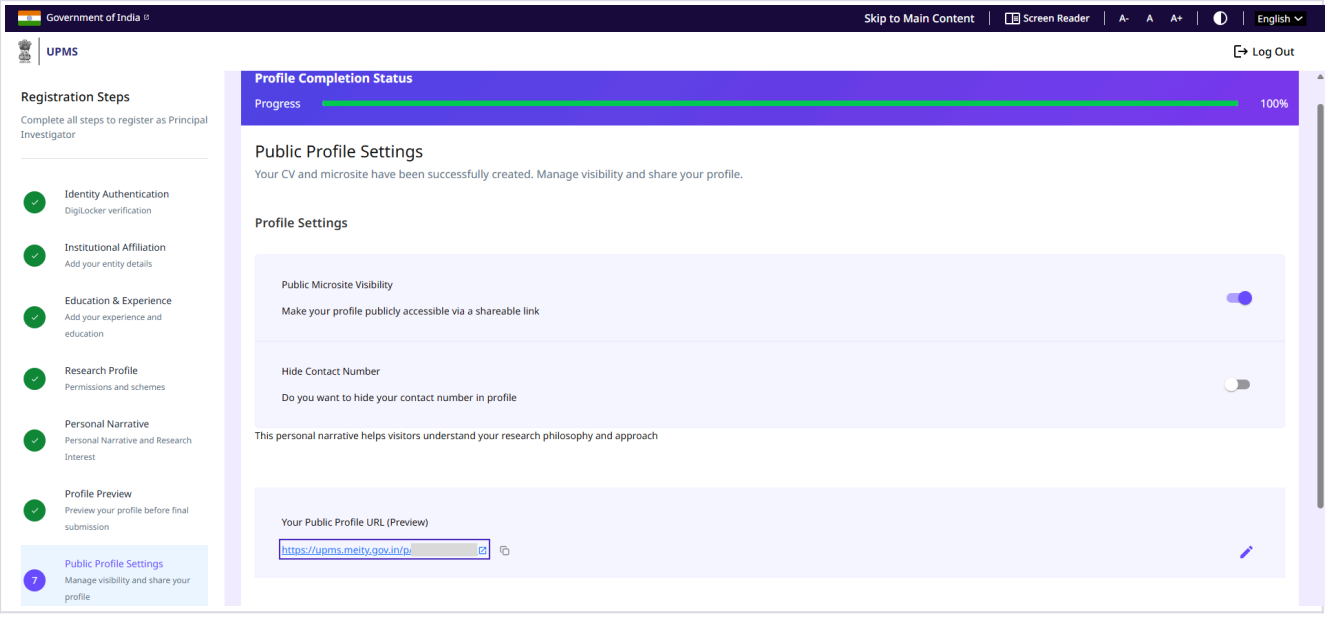
6. Need Help?

If you face any difficulty while logging in, click "Contact Us" to reach the UPMS support team.

7. Role Assignment

After registration as a PI, the Support Admin assigns the System Admin role. The System Admin then assigns roles such as PD, IFD, and Secretary to the respective users.

> 💡 ***What happens:***
>
> *- Users initially have the default PI role. After a new role is assigned, it will appear when the user logs in.*
> *-The user selects the assigned role and clicks the Default button to access the corresponding home page. An automated email is sent to notify the user about the role assignment.*
> *-The same process applies to Scrutinizer, Reviewer, Meeting Group, PRSG, and Program Officer, whose roles are assigned by the PD.*
>
> *-A PI must complete their profile before applying for a CFP.*
>
> *-Once the profile is completed, there will be a toggle button. Click on that button to generate the URL of the profile so that the URL can be used directly for applying on the CFPs. Given below is the snapshot of the profile URL thus created.*



STEP 2 - Access & Role Setup (SA assigns PD)

Before a department can publish a Call for Proposals, someone needs Program Division (PD) access. This step shows how the System Administrator (SA) sets that up.

User Role & Pre-requisites

User Hierarchy	What You Need Before Starting
System Administrator (SA) and Support Admin	• SA access, assigned by the UPMS Support Admin team • The registered Gmail ID or Parichay email ID of the user who needs the PD role

Step-by-Step Walkthrough

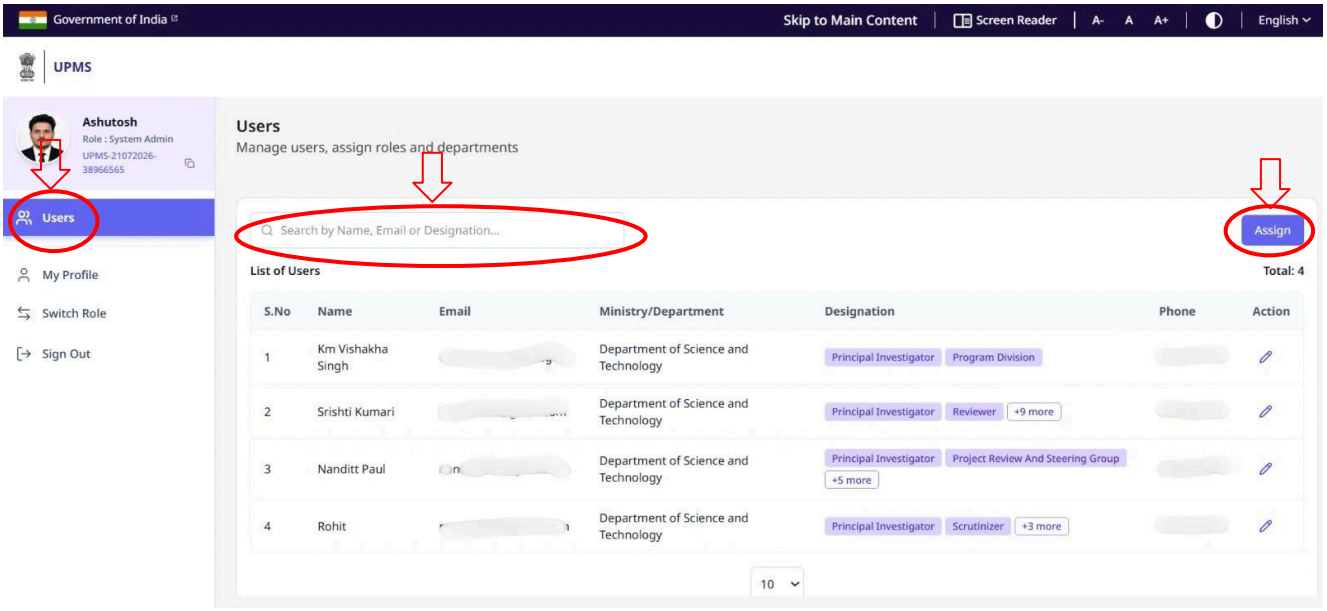
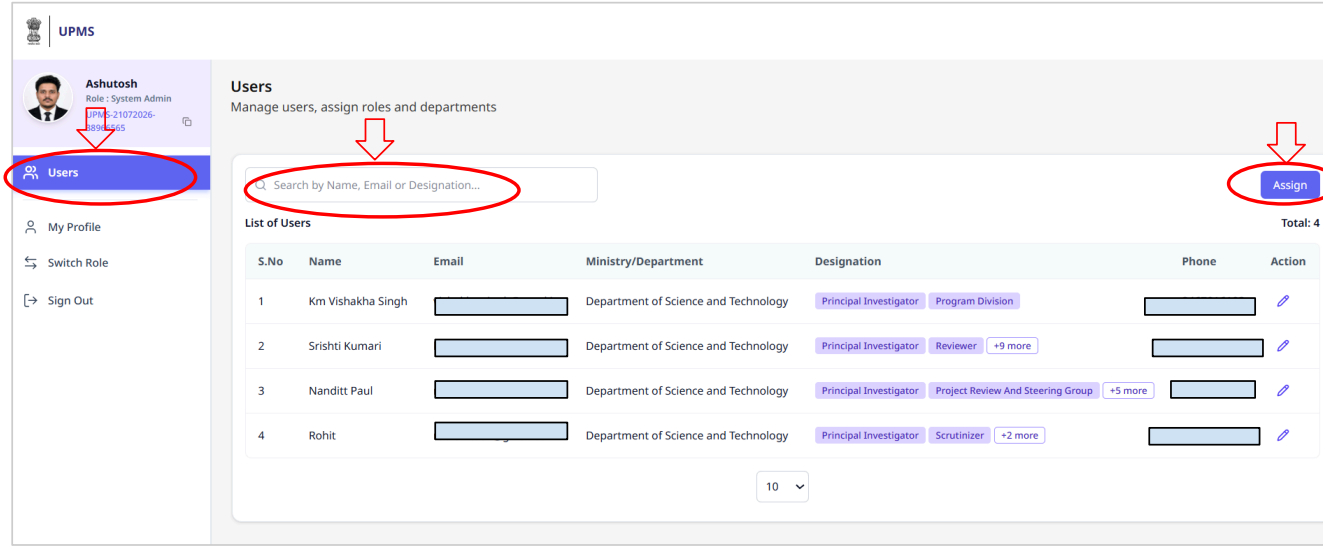


Fig. 2 — The admin screen, where ministries manage the list of System Administrators and their designations.

1. Support Admin Assigns the SA

The UPMS Support Admin team designates one registered user as the System Administrator (SA) for a ministry or department.



💡 ***What happens:*** *That user now sees an Admin section on their dashboard, listing everyone with an admin role in their ministry.*

2. Open the Admin Screen

As the SA, click Users in the left-hand menu.

> 💡 *What happens: A filterable list of users appears, showing Name, Email ID, Ministry/Department, Designation, and Phone Number.*

3. Find or Add the User

Use the Ministry, Department, and Designation filters — or the search bar — to find the person you want to promote. If they are not listed yet, click “Assign” Admin.

> 💡 *What happens: The list narrows down to matching users, or a blank form opens for a brand-new admin entry.*

4. Map the User to the PD Role

Enter or confirm the user's registered Gmail ID or Parichay email ID, and set their designation to respective roles like Program Division/IFD/Secretary.

> 💡 *What happens: The user's role switches to PD the next time they log in, and they gain access to CFP creation and proposal management screens.*

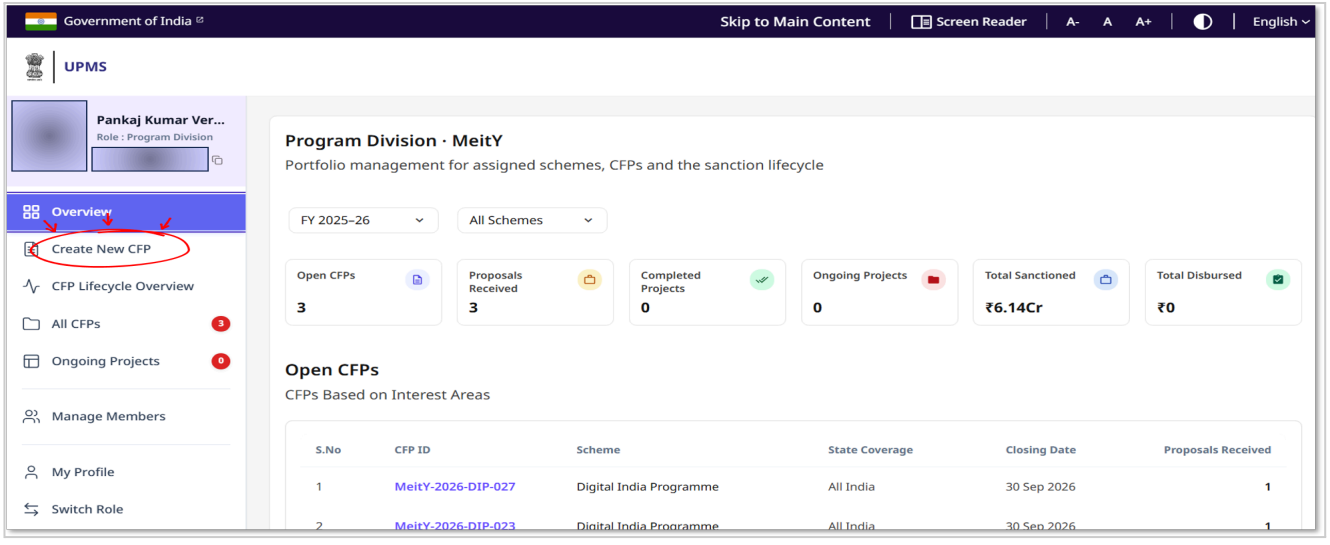
STEP 3 - Creating a Call for Proposals (CFP)

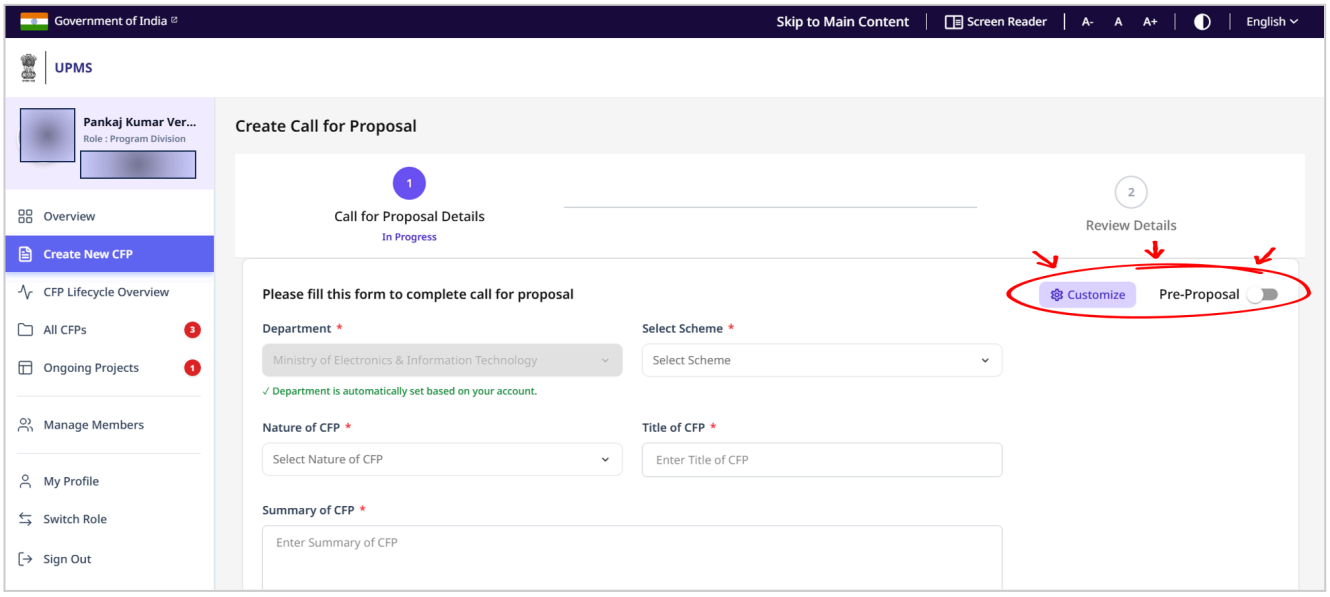
The Program Division publishes a Call for Proposals (CFPs) so that Principal Investigators know what funding is available and how to apply.

👥 User Role & Pre-requisites

User Hierarchy	What You Need Before Starting
Program Division (PD)	• PD access on UPMS • Scheme details, CFP description, and eligibility details ready in advance • Contact details for applicant queries

🚀 Step-by-Step Walkthrough





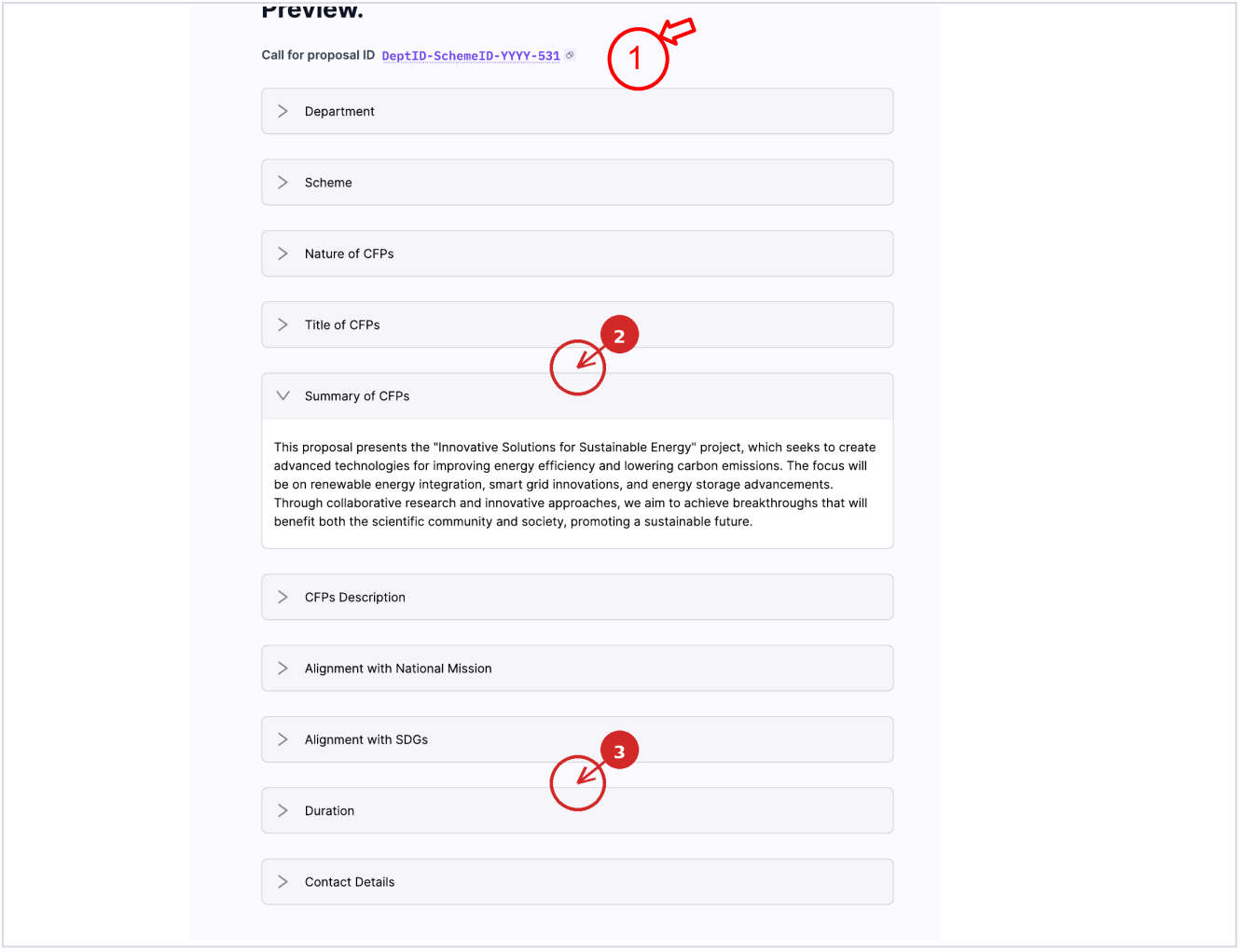


Fig. 3 — The CFP preview screen, showing every section a Program Division fills in before publishing.

1. Open Create New CFP

From your PD dashboard, click Create new CFP in the left-hand menu.

💡 ***What happens:*** ***A blank CFP form opens, starting with your Department/Ministry already selected.***

2. Pre-proposal Toggle

Enable the pre-proposal toggle button

> 💡 ***What happens:*** *It allows the PI to submit key details for initial eligibility review before proceeding with the full CFP application*

2. Customise Button

Click the customise button on the CFP form menu

> 💡 ***What happens:*** *This will pop up a dialog box to customise the CFP form by adding additional fields and their details.*

3. Fill in the Core Details

Enter the Scheme, Nature of CFP, Title of CFP, and a short Summary of CFP.

> 💡 ***What happens:*** *Each field saves as you move to the next one, and a live Call for Proposal ID is generated for reference.*

3. Add the Description and Alignment

Write the full CFP Description, then note how it aligns with any National Mission and the Sustainable Development Goals (SDGs).

> 💡 ***What happens:*** *These details will later appear on the public CFP listing that Principal Investigators see.*

4. Set Duration and Contact Details

Enter the CFP Duration and the Contact Details applicants should use for questions.

> 💡 ***What happens:*** *The form is now complete and ready for a final check.*

5. Preview and Publish

Click Preview to see exactly how the CFP will appear to applicants, then confirm and publish it.

> 💡 ***What happens:*** *The CFP moves to your Open CFPs list and becomes visible to every eligible Principal Investigator.*

STEP 4 - Applying to a CFP (Principal Investigator)

Once a CFP is published, Principal Investigators can browse it on their dashboard and submit a full proposal.

👥 User Role & Pre-requisites

User Hierarchy	What You Need Before Starting
Principal Investigator (PI)	• A registered UPMS account (PI role, assigned by default) • Institute, team, budget, and deliverable details ready to enter • Supporting documents such as publications, patents, and prior project details

🚀 Step-by-Step Walkthrough

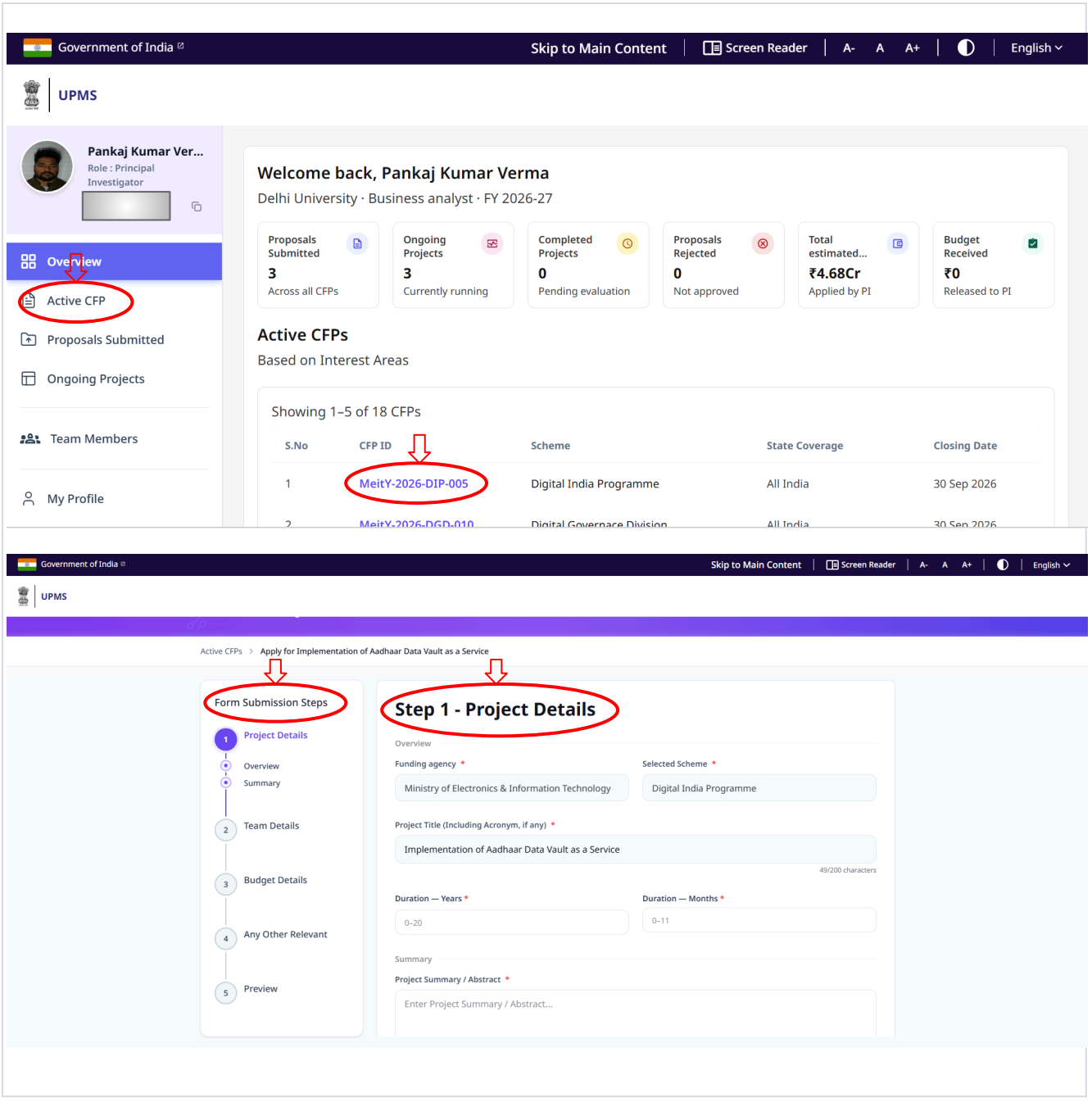


Fig. 4 — The PI dashboard, listing every Active CFP the PI is eligible to apply to.

1. Check Your Overview Screen

Log in and look at the Total Overview cards at the top: Proposals Submitted, Proposals Rejected, Proposals Under Review, and Ongoing Projects, etc.

> 💡 ***What happens:*** *These numbers update automatically as your proposals move through the workflow.*

2. Browse Active CFPs

Scroll to the Active CFPs table, or click Active CFPs in the left-hand menu, to see every active call relevant to your department and scheme.

> 💡 ***What happens:*** *Each row shows the CFP ID, Scheme, Department, Closing Date, and current Status (Open or Closing).*

3. Click Apply Now on the relevant CFP

Find the CFP you want and click Apply Now in the Action column.

> 💡 ***What happens:*** *The full proposal form opens, split into clear sections: Institute Details, PI Details, Project Details, Budget Details, and Pre-filled Details.*

4. Complete Every Section

Fill in the Proposal/Project summary, Team (Co-PIs and members), Budget (recurring and non-recurring), and Deliverables & Documents section by section.

> 💡 ***What happens:*** *You can save your progress and return later — the form keeps your entries until you submit.*

5. Submit the Proposal

Once every mandatory field is complete, click Submit.

> 💡 ***What happens:*** *The proposal moves into the Program Division's Proposal Received queue, and your Proposals Submitted count goes up by one.*

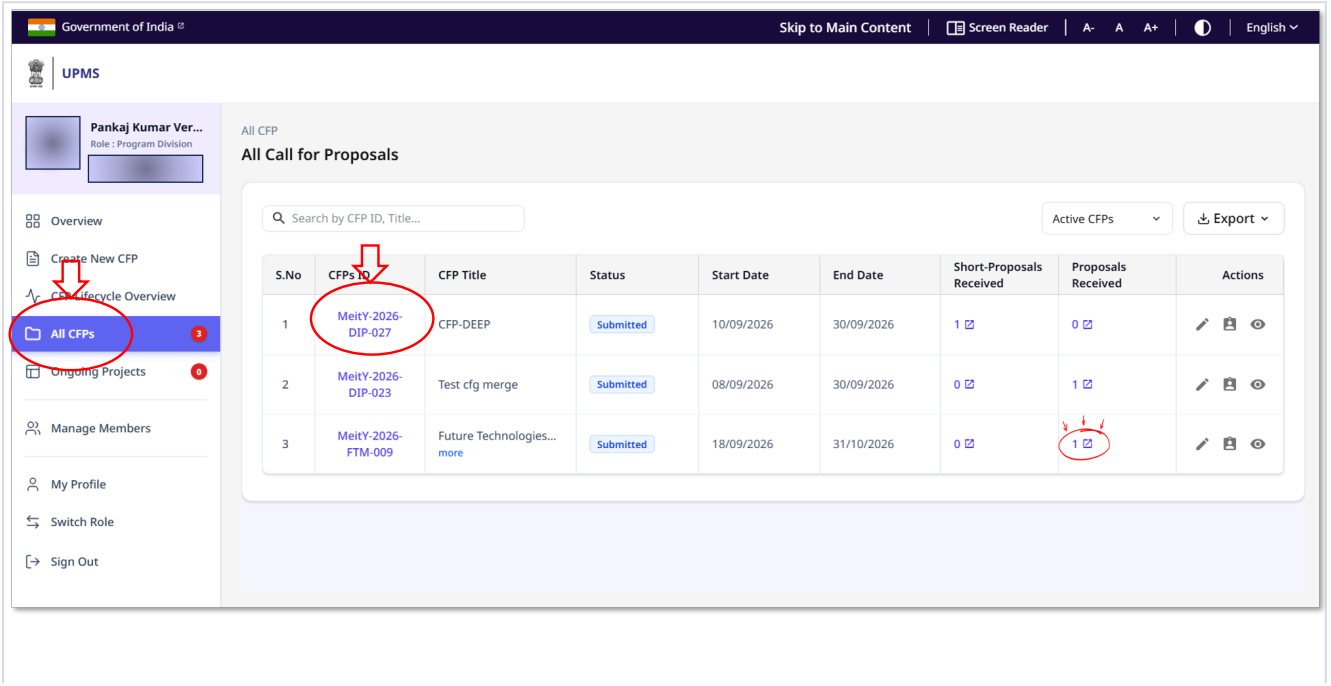
STEP 5 - Proposal Assignment for Review

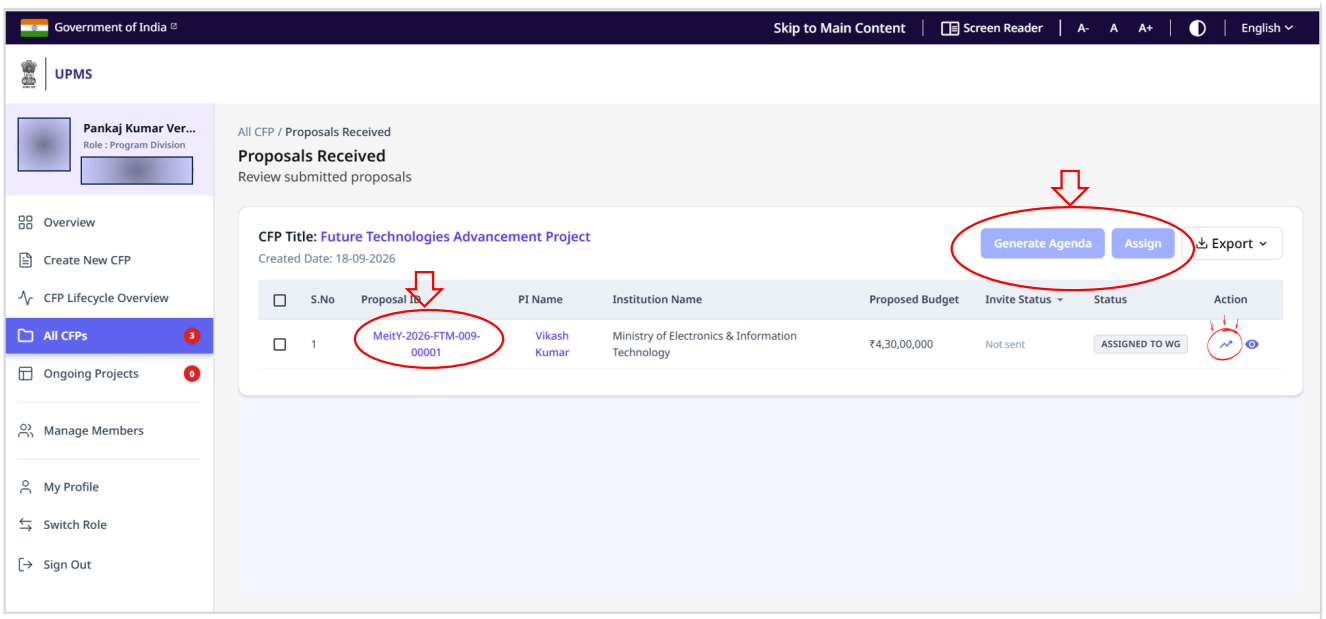
After a proposal is submitted, the Program Division (PD) reviews it and assigns it to a Scrutiniser to begin the evaluation process.

👥 User Role & Pre-requisites

User Hierarchy	What You Need Before Starting
Program Division (PD)	• PD access on UPMS • A submitted proposal waiting in the Proposal Received list

🚀 Step-by-Step Walkthrough





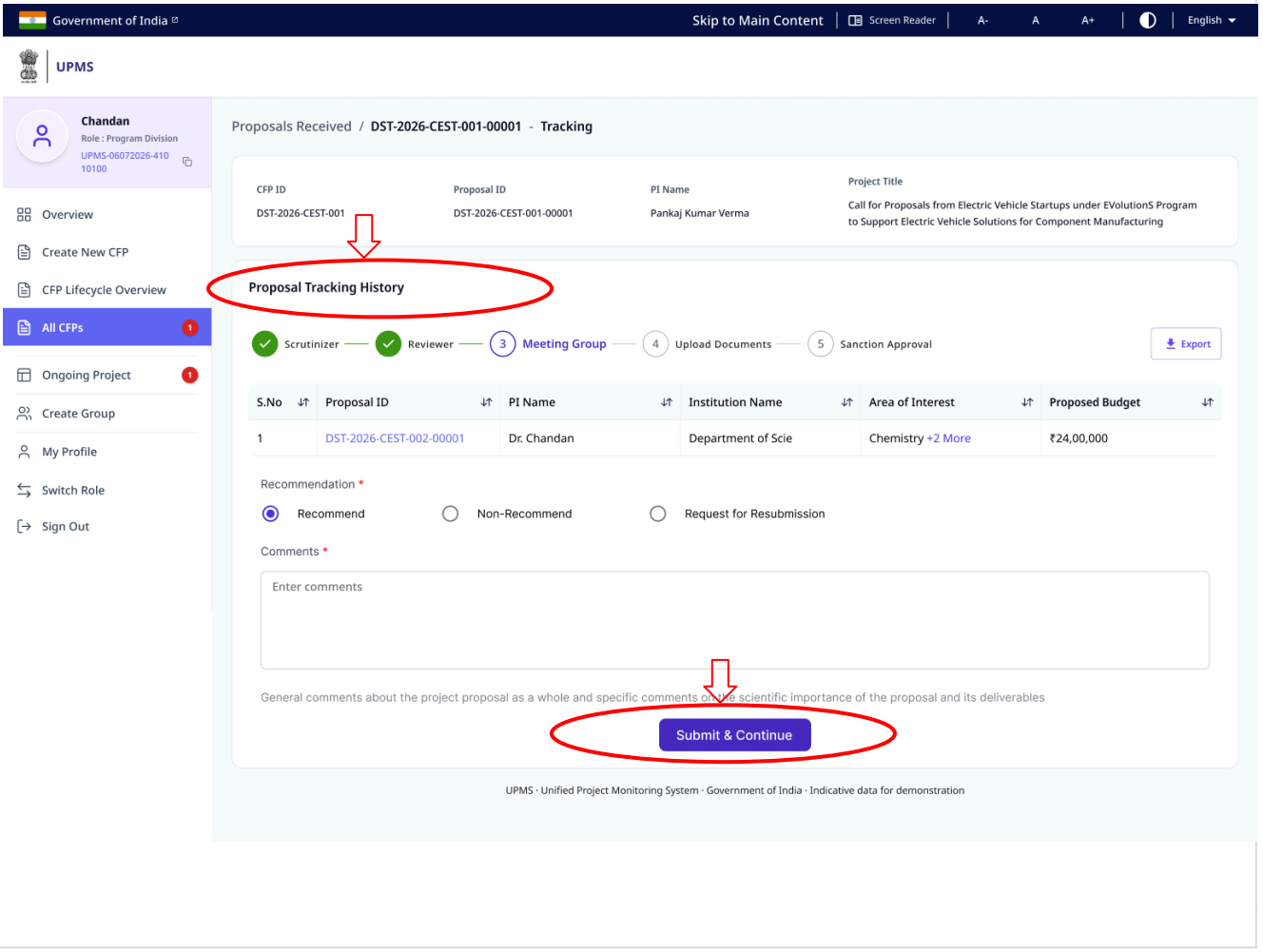


Fig. 5 — Proposal Tracking history, showing the four evaluation stages and the Add Scrutinizer action.

1. Proposals Received

From your PD dashboard, click All CFPs in the left-hand menu.

> 💡 *What happens: A table lists of all CFPs, with its CFP ID, Title, Status, Proposals received, etc.*

2. Open the Proposal's Tracking View

Under “Proposal Received” column, Click on the hyperlink of any CFP to see the details of PI name, Proposal ID, Budget, Action Item, etc

> 💡 *What happens: A five-step tracker appears — Scrutinizer, Reviewer, Meeting Group, Upload Documents and Sanction Approval — showing exactly where the proposal stands.*

3. Assign a Scrutinizer

Click Assign Scrutinizer and choose the person who should carry out the first check.

> 💡 *What happens: A message confirms the proposal now needs the Scrutinizer to progress it, and it appears in that Scrutinizer's queue.*

4. Forward to Review When Ready

Once scrutiny is complete, use Forward to Review to move the proposal on to the Reviewer stage.

> 💡 *What happens: The tracker's second step (Reviewer) becomes active, and the proposal leaves the Scrutinizer's pending list.*

STEP 6 - Scrutiniser Review & Recommendation

The Scrutiniser carries out the first check on every proposal — confirming it is complete and eligible before it goes to detailed review.

👥 User Role & Pre-requisites

User Hierarchy	What You Need Before Starting
Scrutiniser	• Scrutiniser access, assigned by the Program Division • Familiarity with the scheme's eligibility rules

🚀 Step-by-Step Walkthrough

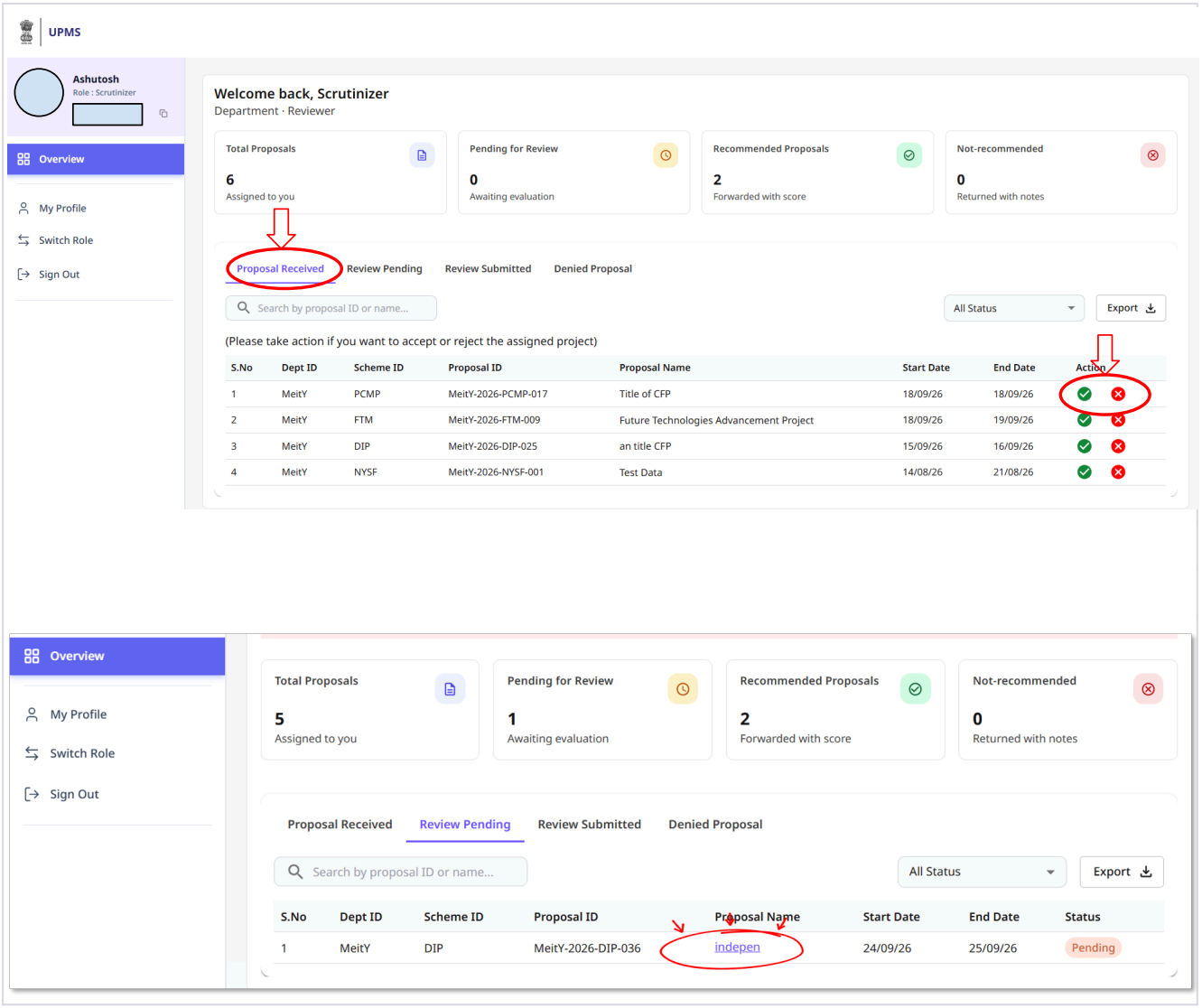


Fig. 6 — The Scrutiniser's Overview screen, with proposal counts and a filterable list of assigned proposals.

1. Review Your Overview Screen

Log in and check the four summary cards: Total No. Proposal, Pending Proposal for Review, Recommended Proposal, and Non-Recommended Proposal.

> 💡 ***What happens:*** *These numbers give you an instant picture of your current workload.*

2. Open a Proposal from Proposal Received tab

Use the Proposal Received tab, then click the ✅ to accept and open Brief Proposal or click or the ❌ to reject.

> 💡 ***What happens:*** *The Project Proposal Scrutiny Form opens, showing Funding Agency, Scheme, Title, Aims & Objectives, Problem Statement, and Methodology.*

3. Read the Brief Proposal Carefully

Click the 'Review Pending' tab, then under the 'Proposal Name' column, Click on the proposals received to be reviewed. Check that every mandatory field is filled in and that the proposal matches the scheme's eligibility rules.

> 💡 ***What happens:*** *Use the Brief Proposal / Detail Proposal toggle at the top to switch between the summary and the full submission.*

4. Record Your Remarks

Evaluate and add your comments and suggested changes whether to “Recommend” or “Not Recommend” or “Request for Resubmission”

> 💡 *What happens: Your remarks are saved against the proposal and become visible to the Program Division and the next reviewer.*

5. Submit the proposal

Click “Submit” to submit.

> 💡 *What happens: Scrutiniser will submit based on his evaluation.*

STEP 7 - Reviewer Review & Recommendation

The Reviewer carries out an independent, detailed technical review of every shortlisted proposal and gives it a rating and recommendation.

👥 User Role & Pre-requisites

User Hierarchy	What You Need Before Starting
Reviewer	• Reviewer access, assigned by the Program Division • Subject-matter familiarity with the proposal's research area

🚀 Step-by-Step Walkthrough

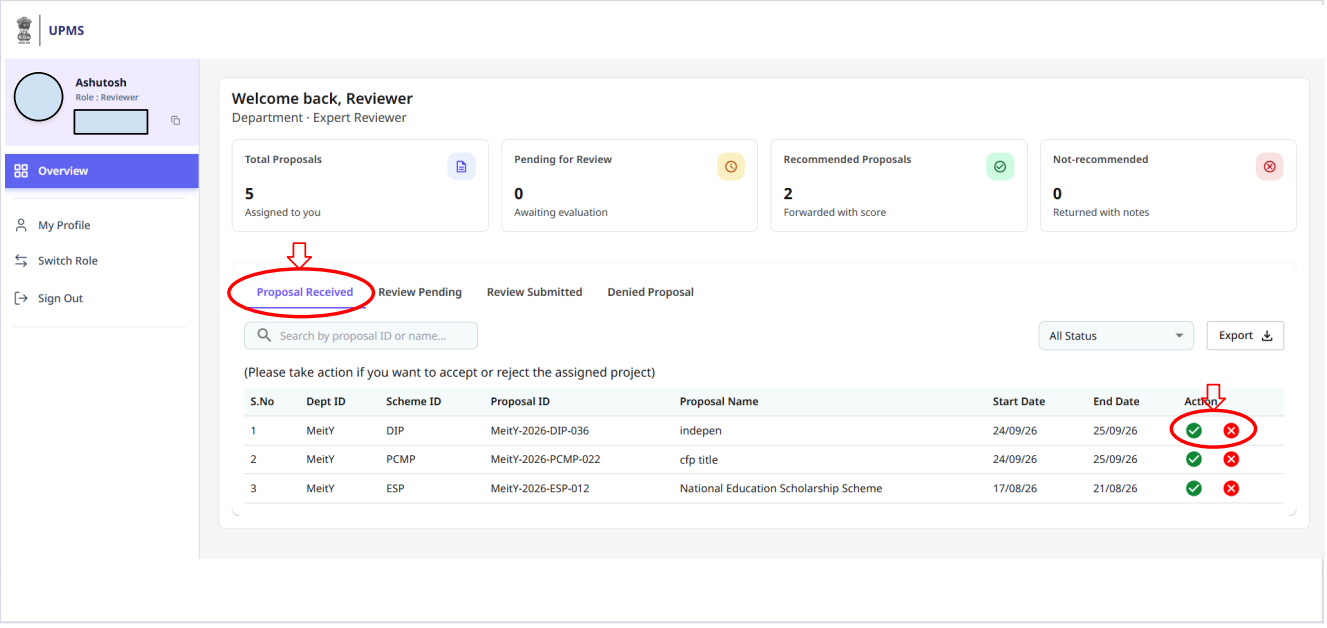


Fig. 7 — The Project Proposal Reviewer Form, where the Reviewer records ratings, comments, and a recommendation.

1. Check Your Proposal Tracking Overview

Log in to see Total No. Proposal, Pending Proposal for Review, Recommended Proposal, and Non-Recommended Proposal at a glance.

> 💡 *What happens: Use the Review Pending, Review Submitted, and Denied Proposal tabs below to filter the list.*

2. Open a Proposal from Proposal Received tab

Use the Proposal Received tab, then click the ✅ to accept and open Brief Proposal or click or the ❌ to reject.

> 💡 *What happens: The Project Proposal Scrutiny Form opens, showing Funding Agency, Scheme, Title, Aims & Objectives, Problem Statement, and Methodology.*

4. Read the Brief Proposal Carefully

Click the Review Pending tab then under the Proposal Name column, Click on the proposals received to be reviewed. Check that every mandatory field is filled in and that the proposal matches the scheme's eligibility rules.

> 💡 *What happens: Use the Brief Proposal / Detail Proposal toggle at the top to switch between the summary and the full submission.*

5. Fill in the Reviewer Form

Add Suggested Items to Add or Remove and your general Comments on the proposal's scientific importance and deliverables.

> 💡 *What happens: These notes are saved as part of the permanent proposal record.*

6. Give an Overall Rating and Recommendation

Select an Overall Rating Score (1–10), then choose Approve, Revise, or Reject.

> 💡 *What happens: Your name and the review date are recorded automatically alongside your recommendation.*

7. Save or Submit

Click Save As Draft to continue later, or Submit to finalise your review.

> 💡 *What happens: A green Success message confirms the review was submitted, and the proposal moves on to the Meeting Group.*

STEP 8 - Meeting Group Review & Recommendation

The Meeting Group is a committee that gives shortlisted, reviewed proposals a final collective look before they move forward for sanction.

👥 User Role & Pre-requisites

User Hierarchy	What You Need Before Starting
Meeting Group Member, created by the Program Division	• Meeting Group membership, assigned through Manage Members by the PD • Access to the Scrutiniser and Reviewer remarks already recorded on the proposal

🚀 Step-by-Step Walkthrough

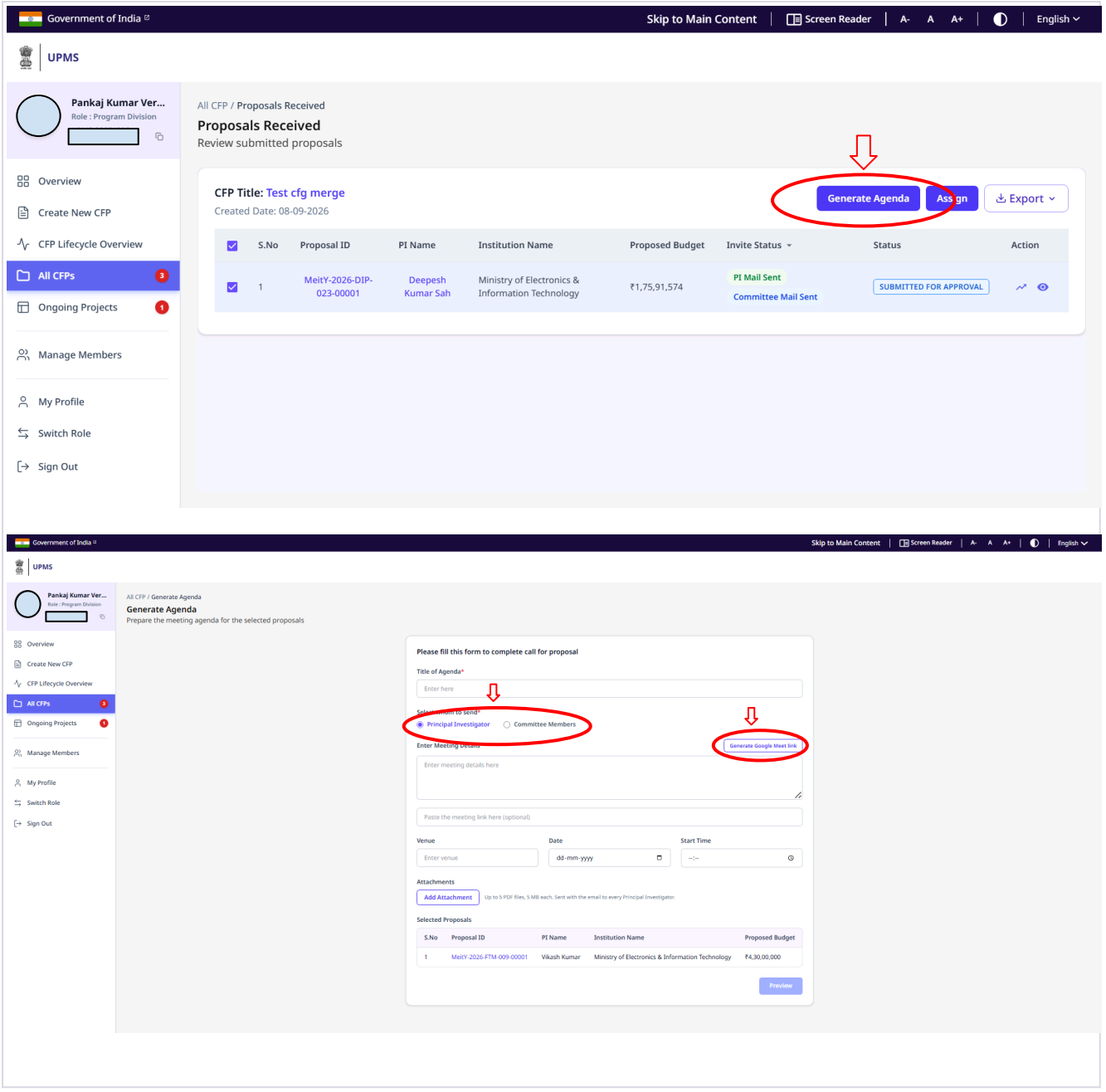
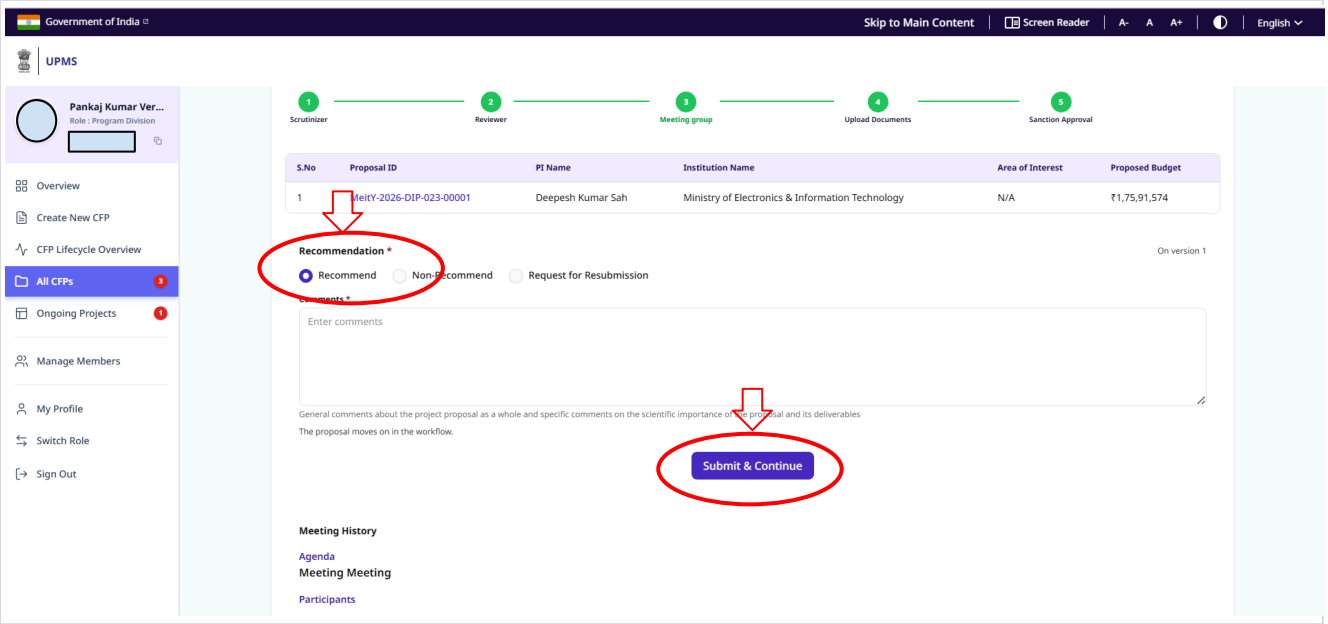


Fig. 8 — The Remarks tab on the MG member's screen, showing earlier Scrutinizer and Reviewer comments and ratings.



1. Open the Assigned Proposal

From your Overview screen, open the proposal the Program Division has routed to your Meeting Group.

> 💡 *What happens: You land on the same Brief Proposal / Detail Proposal / Remarks layout used earlier in the workflow.*

2. Generate Agenda

Check the Generate Agenda to set the meeting agenda for PI and Committee Members. Multiple proposals can be selected together.

> 💡 *What happens: PI and Committee Members go through an online/offline meeting to discuss about the proposals and MOM is created*

3. Discuss and Record the Meeting Group's View (Offline)

During the committee meeting, note the group's Suggested Items to Add or Remove and Comments in the review form.

> 💡 *What happens: These notes, together with the Minutes of Meeting (see Step 14), form the official Meeting Group record.*

4. Submit the Meeting Group's Recommendation

Go to the tracking stages, Click on the Meeting Group, Give a Given Rating Score and set the Recommendation to Recommend, Non-Recommend or Request for Resubmission and then Submit.

> 💡 *What happens: The proposal now carries a complete evaluation trail and is ready to move forward for Sanction Order.*

STEP 9 - Sanction Order and Project Creation

Once every review stage is complete, the Program Division uploads the sanction documents and the approved proposal turns into a live project.

👥 User Role & Pre-requisites

User Hierarchy	What You Need Before Starting
Program Division (PD)	• A proposal that has completed Scrutiniser, Reviewer, and Meeting Group review

	• **Signed sanction letter and related approval documents, ready to upload**

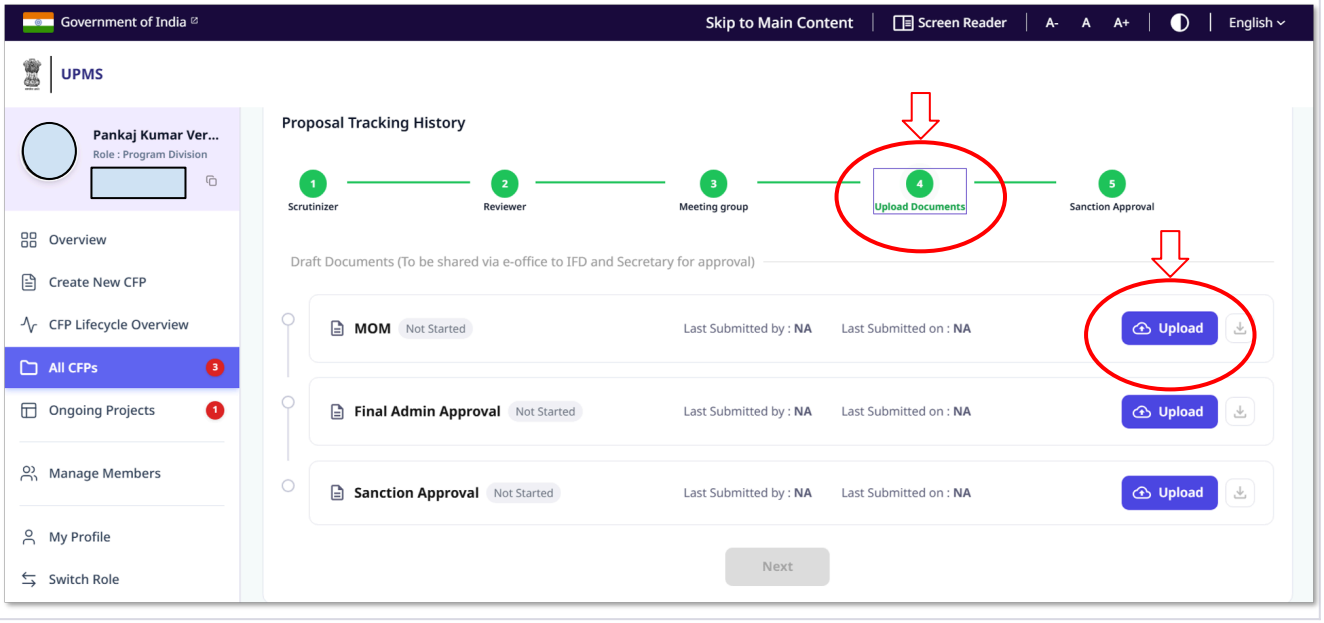


Fig. 9 — The Sanction Order and Upload Documents page that shows the list of documents to be uploaded.

🚀 Step-by-Step Walkthrough

1. Open the Fully Reviewed Proposal

From Proposal Received, open the proposal whose tracker shows all four stages — Scrutinizer, Reviewer, Meeting Group, and Sanction Order — as complete or in progress.

> 💡 ***What happens:*** *The Sanction Order step becomes active once the Meeting Group's recommendation is in.*

2. Upload the Required Documents

Upload the signed sanction letter and any other documents your scheme requires for final approval.

> 💡 ***What happens:*** *The documents attach to the proposal record and become visible to the Principal Investigator.*

3. Confirm the Sanction

Review the uploaded documents once more, then confirm the sanction order.

> 💡 ***What happens:*** *The proposal's status changes from 'Proposal Approved' to a live project.*

4. Find the New Project

Go to Ongoing Projects in the left-hand menu.

> 💡 ***What happens:*** *The project now appears here, visible to both the PD and the PI, ready for deliverable tracking.*

STEP 10 - Creating & Assigning the PRSG

Before deliverables can be reviewed, the Program Division sets up a Project Review & Steering Group (PRSG) and links it to the project.

User Role & Pre-requisites

User Hierarchy

Program Division (PD)

What You Need Before Starting

- PD access on UPMS
- A list of members to include in the Meeting Group and PRSG

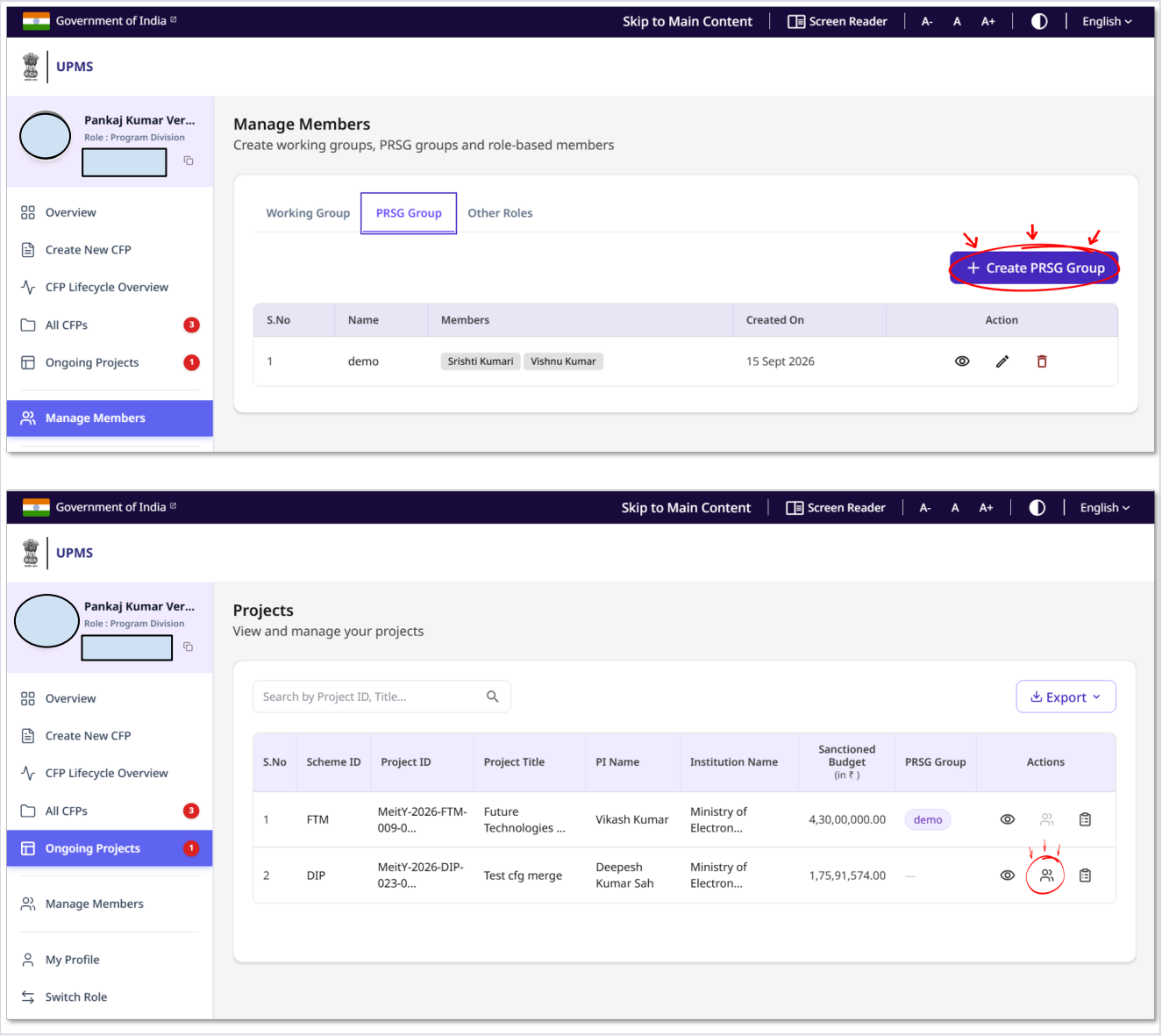


Fig. 10 — PRSG group is created, relevant members are added, and is then assigned to the ongoing projects.

Step-by-Step Walkthrough

1. Open Manage Members

From your PD dashboard, open the Manage Members module.

> 💡 *What happens: You see options to create a new group or manage existing ones, including the Meeting Group (MG).*

2. Create the PRSG Group

Click to create a new group, name it as your project's PRSG, and add the required members.

> 💡 *What happens: The PRSG now appears in your list of groups, ready to be linked to a project.*

3. Assign the PRSG to the Project

Open the relevant project under Ongoing Projects and assign the newly created PRSG to it.

> 💡 ***What happens:*** *The PRSG members can now see this project in their own Assigned Projects list.*

4. Confirm the Assignment

Check the project's details screen to confirm the PRSG is listed against it.

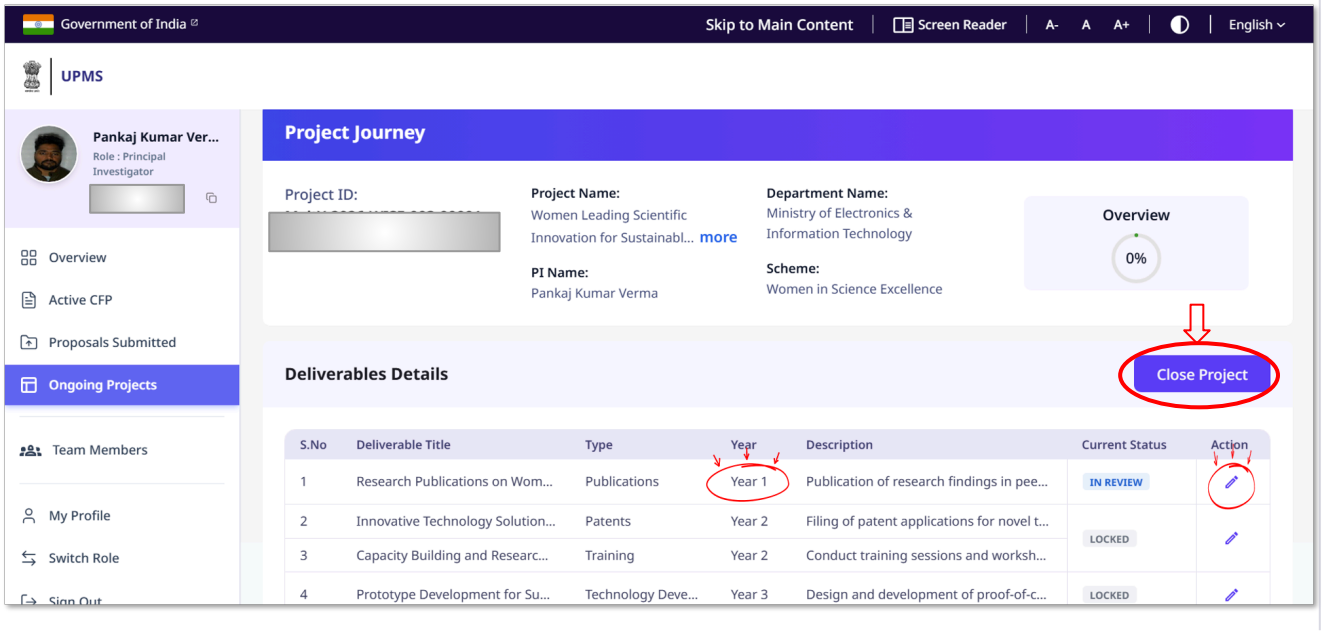
> 💡 ***What happens:*** *The PRSG will now review every year-wise deliverable the PI submits for this project, and record remarks throughout the project's life.*

STEP 11 - Submitting Year-wise Deliverables (PI)

Once a project is live, the Principal Investigator updates progress each year by submitting completed targets, expenses, and supporting documents.

👥 User Role & Pre-requisites

User Hierarchy	What You Need Before Starting
Principal Investigator (PI)	• An approved, ongoing project on UPMS • Progress reports, Utilisation Certificates, and other supporting documents for the year



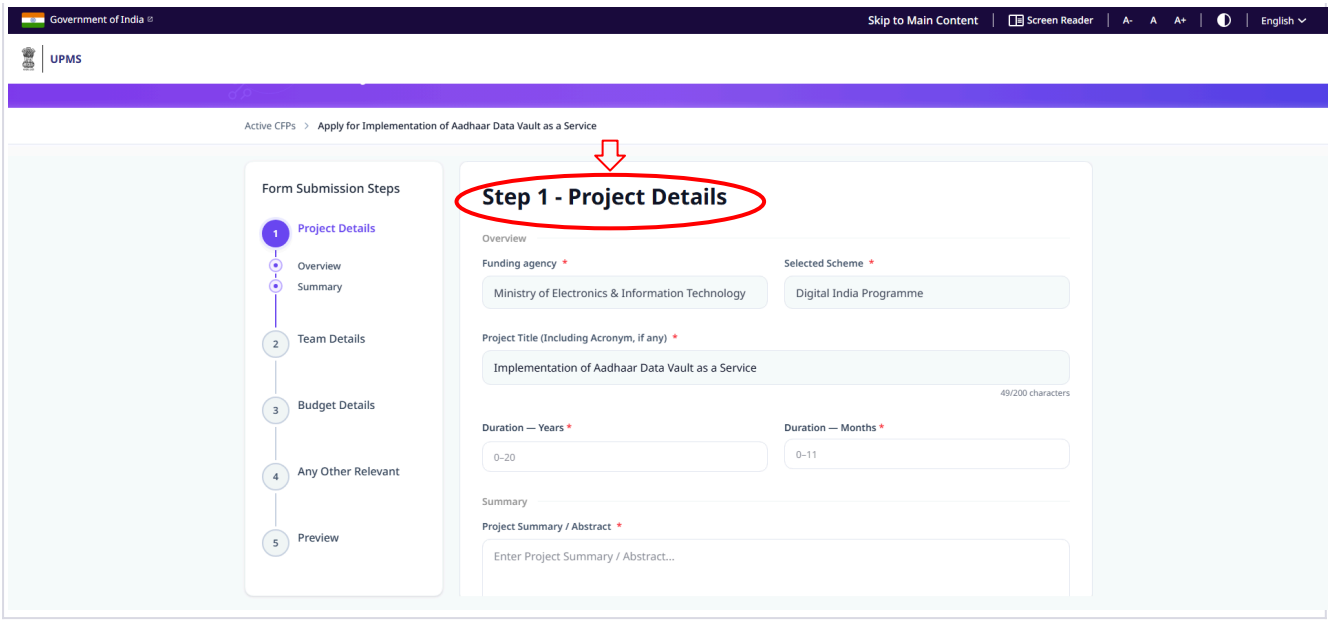


Fig. 11 — PI fills year wise deliverables

🚀 Step-by-Step Walkthrough

1. Open Ongoing Projects

From your PI dashboard, click Ongoing Projects and select the relevant project and click “Project Tracking”.

> 💡 ***What happens:*** *The project's Overview screen shows overall progress as a percentage, alongside key project and scheme details.*

1. Project Journey details

This shows the expected year wise deliverables. Click on the ‘Edit’ icon under the Action Column.

> 💡 ***What happens:*** *A window opens up where year wise deliverables can be filled.*

2. Open the Current Year's Targets

Click on the + Add Deliverable under the Action column to go to the Targets Status section for the current year and deliverable.

> 💡 ***What happens:*** *A Deliverable Details table appears, listing the status, achieved count, necessary documents etc, to add the record.*

3. Update Achievements and Upload Documents

Enter the completed targets, add a description of the work done, and upload supporting evidence such as Utilization Certificates and progress reports.

> 💡 ***What happens:*** *Each uploaded document is listed with a View Uploaded File link so you can double-check it before submitting..*

4. Submit for PRSG Review

Once everything is filled in, submit the deliverable for PRSG review by adding the year wise deliverable details.

> 💡 ***What happens:*** *The submission moves into the assigned PRSG's queue, and the project's progress percentage updates once they respond.*

STEP 12 - PRSG Review of Deliverables

The Project Review & Steering Group checks each deliverable the PI submits, records its remarks, and decides whether to forward it for the next sanction.

User Role & Pre-requisites

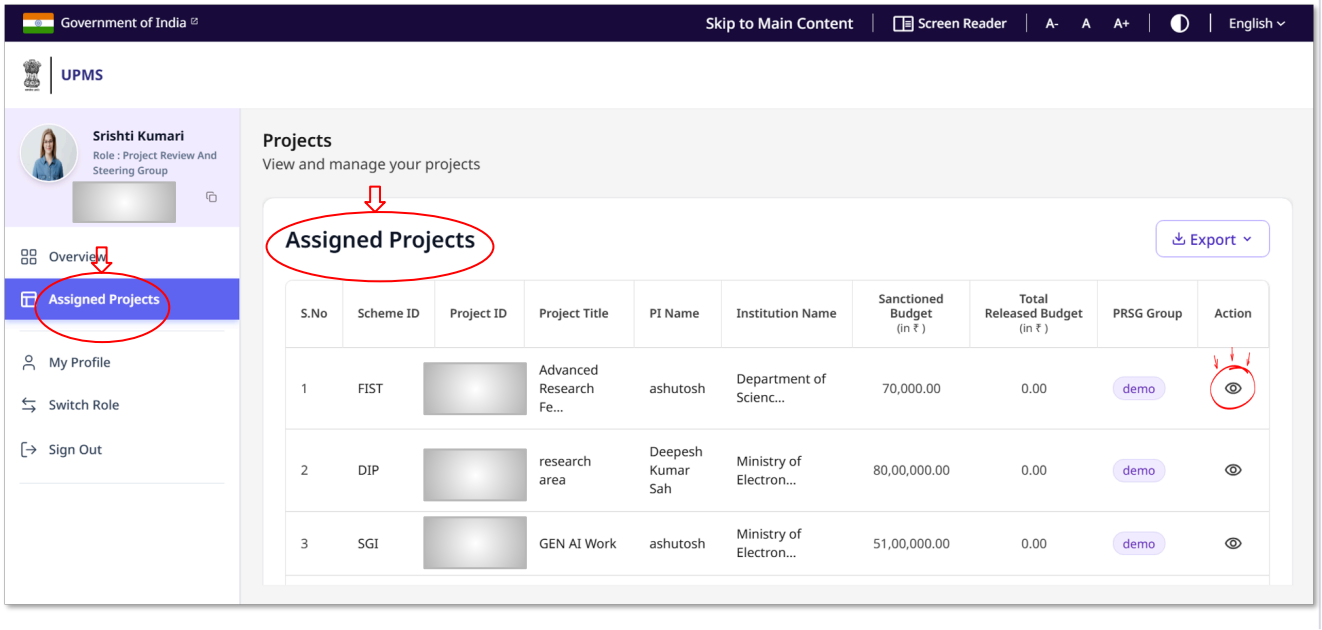
User Hierarchy

Project Review & Steering Group (PRSG) Member

What You Need Before Starting

- **PRSG membership, assigned to the project by the Program Division**
- **Access to the PI's submitted deliverable and supporting documents**

Step-by-Step Walkthrough



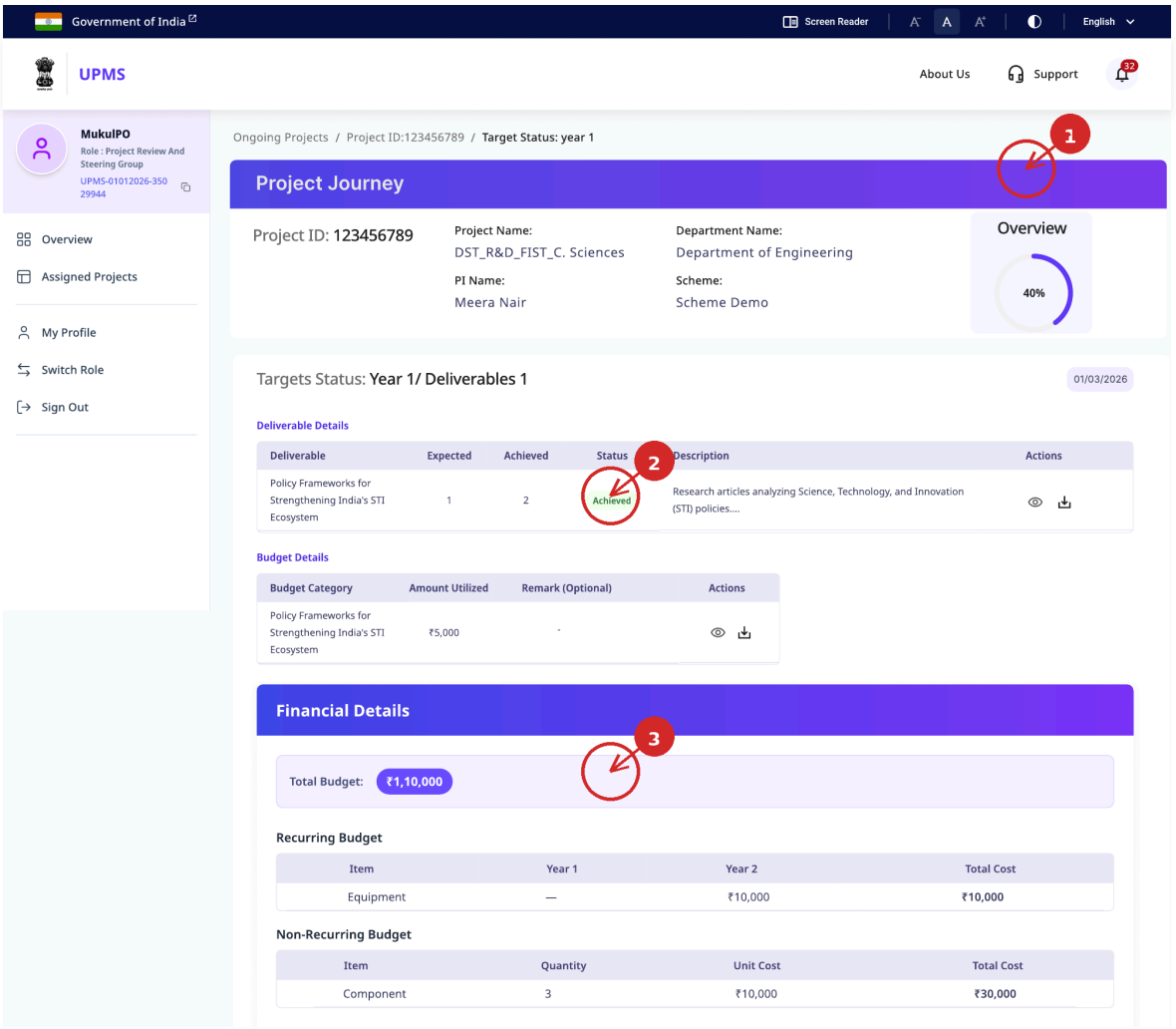


Fig. 12 — The Project Journey screen, showing deliverable details, budget details, and supporting documents for PRSG review.

1. Log in to PRSG Role

Sign in using Parichay or Digi Locker as PRSG

> 💡 ***What happens:*** *Your Assigned Projects list shows every project your PRSG is responsible for.*

2. Open the Assigned Project

Click the project you want to review from your Assigned Projects list.

> 💡 ***What happens:*** *The Project Journey screen opens, showing the Project ID, Name, Department, PI Name, and Scheme at the top, with an overall progress ring.*

3. Review the Submitted Deliverable

Check the Deliverable Details table and the Budget Details table for the year under review.

> 💡 ***What happens:*** *You can view or download every document the PI attached, including the Approved MOM, Admin Approval Form, and Approved Sanction Letter.*

4. Add Your Remarks and Recommendation

Type your comments into the Comment by PRSG Group box.

> 💡 ***What happens:*** *Your comment is saved alongside the PD/PO's own comment, building a full review trail for the deliverable.*

5. Submit the reviewal by PRSG

Click on submit review to PD to submit all the deliverables status

💡 *What happens: PRSG submits the final review of all the deliverables submitted by PI to PD to take further action*

6. Repeat for Every Deliverable

Follow the same steps for each subsequent deliverable, year after year.

💡 *What happens: This loop continues until every deliverable for the project has been reviewed and closed.*

STEP 13 - Project Completion

After every deliverable, expense, and achievement has been recorded, the PI and PD complete a short closure process to formally end the project.

👥 User Role & Pre-requisites

User Hierarchy	What You Need Before Starting
Principal Investigator (PI) and Program Division (PD)	• All project deliverables marked complete • Final expenditure details and closure documents ready to upload

🚀 Step-by-Step Walkthrough

1. PI Starts the Closure

Once all deliverables and expenses are complete, the PI opens the project and clicks Close Project.

💡 *What happens: A closure checklist opens, listing the mandatory documents and remarks needed before the project can be closed.*

2. Upload Closure Documents

The PI uploads all mandatory project closure documents and supporting evidence, and adds any final remarks.

💡 *What happens: The closure request is saved and sent to the Program Division for verification.*

3. PD Verifies the Submission

The Program Division reviews the uploaded documents and checks that every requirement has been met.

💡 *What happens: The PD can request more information from the PI if anything is missing.*

4. PD Records Final Remarks and Closes the Project

Once satisfied, the PD adds final remarks and clicks Close Project.

💡 *What happens: The project status changes to Closed, and it now appears under Completed Projects on both the PD and PI dashboards.*

Steps To Record Minutes of Meeting (MoM)

Every committee decision — from a Meeting Group discussion to a PRSG review meeting — is recorded as a formal Minutes of Meeting on UPMS.

👥 User Role & Pre-requisites

User Hierarchy	What You Need Before Starting
Program Division (PD) and Committee Members (MG / PRSG)	• Meeting details on hand: project name, duration, estimated outlay, and participant list • Key discussion points and recommendations from the meeting

🚀 Step-by-Step Walkthrough

1. Draft the MOM

Minutes of Meeting documents will be generated offline by the given user.

> 💡 *What happens: This document will be finally uploaded by the PD of the given department and Ministry on the UPMS portal.*

2. MOM Document should consist of following fields

Write the Name of the Project, Project Duration, Estimated Outlay, and Project Investigator.

> 💡 *What happens: These fields carry over from the proposal*

3. Write the Participants name

Write the Participant name for every committee member present at the meeting.

> 💡 *What happens: Participants name will work attendance and the number of user participated.*

4. Record Key Discussion Points

Use the Key Discussion Points paragraph to summarise what was discussed.

> 💡 *What happens: Discussion point will include all the key details that are discussed during the meeting.*

5. Provide Recommendations

Type the committee's Recommendations (up to 500 words)

> 💡 *What happens: The completed MoM document is uploaded against the proposal or project and becomes part of its permanent record.*

Dashboards & Analytics

UPMS gives every senior role — Program Division, Principal Investigator, Secretary, and NITI Aayog — a dashboard tailored to what they need to track.

👥 User Role & Pre-requisites

User Hierarchy	What You Need Before Starting
Program Division (PD), Principal Investigator (PI), Secretary, NITI Aayog	• A UPMS account with the relevant role • No extra setup — dashboards populate automatically from live portal data

🚀 Step-by-Step Walkthrough

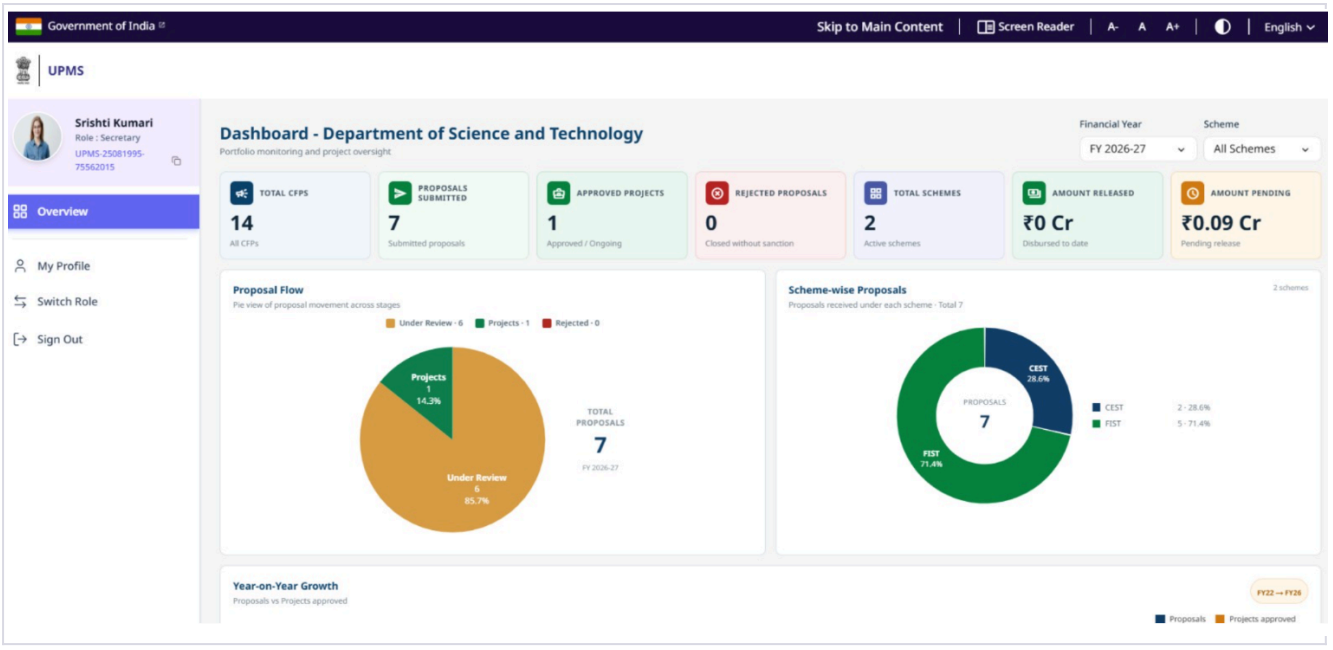


Fig. 11 — The cross-ministry analytics dashboard, showing Operational Health, Financial Health, and workflow pipeline.

1. Open Your Overview Screen

Log in and land directly on your role's Overview / dashboard screen — no extra clicks needed.

> 💡 *What happens: Every dashboard opens with a Total Overview strip of key numbers relevant to that role.*

2. Check the Financial Year and Scheme Filters

Use the Financial Year and Scheme drop-downs near the top of the screen to focus on a specific period.

> 💡 *What happens: All figures below the filter — proposals, budgets, and project counts — refresh to match your selection.*

3. Explore the Proposal Workflow Pipeline

Scroll to the Proposal Workflow Pipeline chart to see how many proposals are waiting at each stage: Pending at PD, Pending at Scrutiniser, Pending at Reviewer, Pending at MG, and Awaiting IFD/Sanction.

> 💡 *What happens: Longer bars point straight to the stage that needs the most attention.*

4. Review Financial Health

Check the Financial Health cards for Total Sanctioned and Total Disbursed amounts.

> 💡 *What happens: The Project-wise Sanction & Utilization table below breaks this down by individual project, PI, or scheme.*

5. Use Higher-Level Views (Secretary / NITI Aayog)

Secretary and NITI Aayog dashboards add State Distribution, Institute Ranking, Gender Diversity, and Critical Risk Assessment panels for a cross-ministry view.

> 💡 *What happens: The Critical Risk Assessment table flags projects with delayed milestones or low fund utilisation, so leadership can step in early.*

Appendix — Points of Contact

Submitted by	Reviewed by
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For any queries, clarifications, or support regarding the UPMS Portal, please contact us at

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