INDIAN INSTITUTE OF MANAGEMENT KOZHIKODE

भारतीय प्रबंध संस्थान को षक्कोड़

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IIM Kozhikode Campus P.O, Kozhikode, Kerala - 673 570

Website: https://iimk.ac.in

1.	Tender No	11-012/01/ERP/RFP-06/2021-IIMK-PUR dt. 05.08.2021
2.	Name of the work	**Implementation and Support of Enterprise Resource Planning (ERP) Solution at Indian Institute of Management Kozhikode (IIMK)**
3.	Period of issue / downloading of Bid forms	05.08.2021 to 16.09.2021 till 2:00 p.m
4.	Cost of Bid Document	The tender form can be freely downloaded from IIMK Website: http://www.iimk.ac.in/ announcements /Tender.php & https://mhrd.euniwizarde.com.
5.	EMD	The bidders are not required to submit the EMD. They shall submit a Bid Security Declaration Form as per the form enclosed in the Tender Documents.
6.	Site visit, if required	During 3:00 p.m- 5:00 pm on all working days
7.	Pre-Bid Meeting	24.08.2021 at 11:00 a. m.
8.	Deadline for submission of Request For Proposal	16.09.2021 till 3:00 p.m.
9.	Date of Opening Request For Proposal Technical Bid	16.09.2021 till 4:00 p.m.
10.	Technical Discussion & Presentation for those qualified in the First stage technical Bid.	Will be communicated to the shortlisted Bidders
11.	Mode of Submission of hard copy Request For Proposal	Can be sent by Speed Post/Registered Post/ Courier or dropped in the Box entitled 'Purchase Section' in the Admin. Building
12.	Address to which the hard copies of Request For Proposal is to be sent	Chief Administrative Officer Indian Institute of Management Kozhikode IIM Kozhikode Campus P.O. Kozhikode-673 570
13.	Contact Person for Technical Queries	ERP Adviser Indian Institute of Management Kozhikode IIM Kozhikode Campus P.O. Kozhikode 673 570, Tel: 0495-2809193 E-Mail Id: erpadvisor@iimk.ac.in

Disclaimer

This Request for Proposal (RFP) is for selection of System Integrator (SI) for Implementation and Support of Enterprise Resource Planning (ERP) package at Indian Institute of Management, Kozhikode (IIMK). This document contains confidential information on the Indian Institute of Management Kozhikode (IIMK) which is provided for the sole purpose of permitting the bidder to make a proposal. In consideration of receipt of this document, the bidder agrees to maintain such information confidential and to not reproduce or otherwise disclose this information to any person outside the group directly responsible for evaluation of its contents, except that there is no obligation to maintain the confidentiality of any information which was known to the bidder prior to receipt of such information from IIMK or becomes publicly known through no fault of bidder, from IIMK or is received without obligation of confidentiality from a third party owing no obligation of confidentiality to IIMK.

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1. Introduction

Indian Institute of Management, Kozhikode (IIMK) is one of the top most premier business schools in India. IIMK was constituted in 1996 by the Government of India in collaboration with the Government of the state of Kerala and comes under Ministry of Human Resource and Development (MHRD), Government of India. IIMK is the 5th Indian Institute of Management in the country. IIMK's main campus is located in Kunnamangalam, Kozhikode in state of Kerala. Institute also has a satellite campus located at the Info-Park in Kochi Kerala. IIMK is offering Post Graduate Programmes, Doctoral – Fellow Management Programmes, Executive PostGraduate Programmes, Management Development Programmes and Faculty Development Programmes.

Indian Institute of Management, Kozhikode (IIMK) intends to implement **Commercially off-the shelf (COTS)** (described in Abbreviation) ERP Solution across all sections of IIMK to automate its operation and for this they intend to engage a capable, reputed and experienced System Integrator (hereinafter referred to as the SI) to recommend cloud based ERP Solution, implement, develop and support the proposed ERP solution for IIMK. The indicative functional requirements and processes are described in detail in this RFP document. Please note that these are not exhaustive. IIMK is looking for reputed, world class and well established solutions. IIMK seeks comprehensive proposals from bidders who have the capabilities to meet IIMK's requirements and have interest in providing the services. This RFP provides information on IIMK, the requisite scope of work and instructions for the preparation and submission of the RFP response by the bidder.

The objectives of this Request for Proposal (RFP):

1. To invite detailed proposals from bidders as per the objectives/scope defined in this RFP and adhering to stipulated terms and conditions.

2. To award the contract to the selected bidder based on the t e c h n i c a l and price bids evaluation.

The Successful Bidder shall be the single point of contact for all products and services offered, as described in the scope of work, and will be fully responsible for the overall deliveries, project management and co- ordination as specified in Scope of work.

1.1 Background

Indian Institute of Management, Kozhikode (IIMK) intends to implement a strategic cloud based ERP Solution to automate and streamline its operations, improve administrative efficiencies and provide improved services to all stakeholders. These encompass areas of standardized process flows, long range planning, budgeting, maintaining student life cycle, Faculty development, finance and accounting management, funds management, collaboration with other management schools of excellence and industry, in India and other countries. The broad functional areas identified, to be covered under this project are

Core functionalities/Modules

Human Resource Management and Payroll
Financial Accounting & Control Management, Management Accounting and Asset
Management
Purchase and Inventory Management
Student Information System (SIS) & Academic administration
Document Management System

1.2 Objectives and Benefits

IIMK would like ERP to meet their requirements like standardized process flows, online reporting, Human resource management, Payroll, Student Information System, finance and accounting management and funds management. IIMK envisages the following benefits from implementing ERP across its functions / areas.

- Common integrated system platform across different functions and processes of IIMK
- Process standardization across the institute to bring-in unified approach
- Automation and integration of data, systems, operational processes and smoother reconciliation of information.
- Seamless integration of student information across the institute
- Automate management controls and approvals to reduce cycle time
- To enhance the user experience including students, faculty and employees though state of the art automation
- Real Time and end-to-end visibility of information on multiple dimensions (e.g: financials, inventory, employee, student and vendor database etc.) across IIMK

- Real time reporting on the performance of the individual operating departments and a streamlined Management Information System
- Single version of information to all the stakeholders from common database
- Facilitate paperless working and provide decision support mechanism
- Mapping of assets and their life cycles
- Analysis of budget and actual data
- Data integrity across various IIMK functions like departments, centers, administrative units, finance and accounts, etc.
- Monitor research activities and funds utilization
- Seamless and on-demand information availability to improve operational efficiency and provide tangible operational benefits.
- Consolidation of data and availability of reports for management for enhanced decision making.
- Availability of key applications and reports on Mobile platform and handheld devices.
- Scalability of the proposed solution as per IIMK requirements.

The key expected outcome for IIMK from this ERP project are meeting stakeholder expectations, operational excellence, transparency and compliance.

1.2.1 Stake Holders Expectations

All the people involved with the various activities of IIMK, are the stake holders of the IIMK. The Stakeholders of IIMK are Policy makers, Faculty, Students, Administrative Staff, Contract staff, Alumni, Partnering Academic Institutions and Partnering Organizations / Companies Some of the benefits envisaged by key stake holders are:

Stake holders	Expected Benefits
Students	Ease of transaction with IIMK for all academic, official and financial aspects. All the information related to students are automated and should be available on real time. The key features to include transparency, Student- friendly interaction , SLA based response-time, user friendly screens, online status updates, auto-escalations for speedy resolution of outstanding issues, availability in mobile and other devices
Faculty	Real time update and access of Student information, HR, Payroll and benefits information. Faculty credit and development fund status. The system to have user friendly screens , workflow automation of Process and better turnaround time

Area / Functional Heads	Work flow automation with embedded business rules, audit trail, MIS Reports, Real time data Visual Dashboards and better turnaround time.
Policy Makers	Better Governance, reduction in cycle time of key processes, better turnaround time, MIS Reports , availability of real time information and Visual based dashboards
Administrative Staff	Provide services in a transparent and efficient manner, integration across several functions, availability of real time data, reduction in routine jobs, upgrade skill to join contemporary digital era
Contract Staff	Provide services in an efficient manner
Alumni	Provide the needed services and information
Partnering Academic Institutions	Provide services and data needed in an efficient manner
Partnering Organizations / Companies	Availability of relevant information , quick and efficient services

Table 1: Expected Benefits of stakeholders

1.2.2 Operational excellence

- Integration of processes – Finance, HR, Procurement, Academic administration, Student Information System across and multiple locations and multiple delivery channels
- Utilization of resources – Assets, financial resources and intellectual resources for delivering the services
- Quicker turnaround time for critical processes, financial transactions, reporting, analysis and feedback
- Excellence in the Deployment of facilities & resources and planning of projects

1.2.3 Transparency and Compliance
- Proactive and tighter adherence to regulation
- Adherence to standard government norms, guidelines in financial transactions, reconciliation and reporting
- Compliance to regulations and best practices

1.3 Strategic C o n s i d e r a t i o n s

a) The strategic considerations for ERP solution at IIMK are Future expansion. The ERP solution will be used for automating all the functions of IIMK and is also required to meet future expansions in terms of new programs, centers, scale of student intake capacity, etc.

b) Integration – To protect the current investments in the stand-alone IT applications, IIMK intends to integrate some of them with the ERP solution. To ensure this, one of the key elements of the solution strategy is to ensure having solution with open standards for integration of different third party / legacy / in-house developed applications / solutions.

c) Proven Solution – Processes of IIMK are moderately unique in the areas of academics, finance, human resource and payroll as compared to general practices, but similar in some areas to the leading educational institutes of national importance and government. Keeping this uniqueness and maturity of the processes in mind, IIMK will use ERP solutions which have been used implemented successfully in the leading education institutes of national importance, leading institutes universities in the world and in government.

1.4 Implementation Scope & Timelines

IIMK proposes to have a phase wise approach for the implementation of the solution. The project is to be implemented in two key phases, details of which are given below:

Details	Phase 1	Phase 2
Scope (Functionality Covered)	Human Resources Management (HRM), Document Management System	Student Information System, academic administration system and Hostel Management
	Financial Accounting and Control Management Accounting with provision to capture Student Payments from Student Finance	Student , Faculty and staff Self Service Portals and Dash boards for senior management
	Purchase Stores and Inventory System	Mobile Applications and Analytics

	Payroll, Benefits like PF, Loans, medical claim , LTC , Travel, Faculty Development fund etc.	Student , Faculty and staff Self Service systems and Dash boards
	Faculty, Staff Self Service systems and Dash boards with core system data, Document Management System	Faculty, Staff Self Service systems and Dash boards with all real time data including academics
	Work flows , supporting bolt on applications and Integration of existing nonacademic applications	Work Flows , supporting bolt on applications and Integration of existing academic applications
Functional requirements	Detailed in Annexure 1	Detailed in Annexure1
Implementation Timeline to Go-Live	Within first 9 months	Within first 11 months
Post Go-Live Stabilization	3 Months Post Go-Live of Phase 1	3 Months Post Go-Live of Phase 2
Support Timelines	Five (5) years, after Post Go-Live stabilization of Phase 1 (including 3 months of handholding support)	Five (5) years, after Post Go-Live stabilization of Phase 2 (including 3 months of handholding support)

Table 2: Overview of implementation phases

1.5 Required Hosting Model

The bidders are requested to submit bids for the following hosting model:

	Cloud Model
Human Resource Management (HRM) including Payroll	Yes
Financial Accounting and Control Management	Yes
Purchase and Inventory System	Yes
Student Information System and Academic Administration system	Yes
Analytics and Mobile Applications	Yes
Any other modules of ERP	Yes

Table 3: Overview of application hosting model

1.6 ERP Licensing

The SI / Bidders scope for ERP licensing are as follows:

1. SI has to propose /recommend the ERP software which will meet IIMK functionalities mentioned in our Functional Requirement Specification, Technical Requirement Specification, hosting model and all other requirements mentioned in IIMK's tender documents.

2. SI based on the ERP recommended for IIMK has to provide the Bill of Quantities (BOQ) and Solution architecture which will meet the functionalities of IIMK. This scope of BOQ should include user Licenses, Annual Technical Support **(**ATS), development tools for portal, mobile, integration, workflow, applications and all other tools mentioned in FRS.

3. **The licenses offered should be for a cloud based ERP system . The cloud ERP should be scalable and have provision to build customisation custom process and innovation.**

4. **SI should get an undertaking from ERP - OEM that OEM shall quote and supply license and Annual Technical Support for the BOQ submitted by the SI directly to IIMK.**

5. **If SI fails to submit the undertaking from OEM their Technical bid will not be considered.**

6. **If OEM fails to give quote to IIMK and does not agree to supply after the evaluation of Technical bid of the SI then SI will not qualify for the second stage – Prices bid evaluation.**

7. Bidder has to propose the license for the recommended ERP. The number of users for current functionalities at IIMK have been provided in the table 4.below

SN	User	Count
1	High end Professional users	25
2	Medium functional users	20
3	Basic ordinary users	10
4	Development user	1
5	Human Resource Management Faculty Self-service Portal Staff Self Service Portal Contract Staff Self Service Portal Total	100 110 150 360
6	Employee Self Service Managerial Self Service	360 100
7	HCM - Payroll	500
8	Students for Academic System	2230
9	Document Management System	as needed

Table 4: User Count

The number shown for the user licensing is based on the current requirements at IIM Kozhikode, but if any of the functions licensing is based on slabs and not based on actual number of users, then the maximum number of user licenses of the respective slab where the current requirements fall, may be taken.

Based on the recommended ERP package, Bill of Quantities (BOQ) and Solution architecture, IIMK shall procure the ERP Software license and Annual Technical / Service Support directly from the ERP OEM. The BOQ, solution architecture, user license, tools for development, tools for integration which is to be procured from OEM for this implementation to be shown in a separate sheet in the technical bid.

The SI will have to provide the following support:

1. Recommend ERP package, Solution architecture and Bill of quantities for IIMK based on the requirements in the tender
2. Support and advise IIMK during procurement of License , signing of End User License Agreement (EULA) and Annual Technical Service support agreement with OEM
3. All technical support for the ERP product during implementation and support periods.
4. Facilitate with OEM in solving Service and critical service related issues.
5. The SI shall be responsible for the installation, configuration, customization, integration, testing, data migration and deployment of the proposed system. It is suggested to make minimal changes to the standard modules to ensure that future upgrades, enhancements and bug fixes are done without any complexity. Every customization to the system must be documented in detail and the code/script should be properly annotated with comments.

2. Selection Process for bidder

The purpose of evaluation process is to evaluate the bids and select an effective and best fit solution at a competitive price. IIMK may call for any clarifications, additional details, presentation and product demo based on the technical and commercial bids submitted. The bidder has to submit within the specified date and time. The bidder's offer may be disqualified, if the clarifications/ additional particulars sought are not submitted within the specified date and time.

Technical Bid Evaluation is based on the Compliance and Technical Evaluation Criteria. Based upon the final technical evaluation scoring, short listing would be made of the eligible bidders. The Price Bid of shortlisted vendors will be taken for final price evaluation. Decision taken by IIMK will be final.

2.1 Evaluation Criteria

2.1.1 Pre-Qualification Criteria

The Bidder needs to comply with all the Pre-Qualification criteria mentioned in the Tender. Non-compliance to any of these criteria would result in outright rejection of the Bidder's proposal. The Bidder is expected to provide documentary proof for each of the PQC points for Pre-Qualification evaluation criteria. Any credential detail not accompanied by required relevant proof documents will not be considered for evaluation. The decision of IIMK would be final and binding on all the Bidders to this document. IIMK may accept or reject an offer without assigning any reason what so ever.

Prequalification criteria for Implemetation Partner

#	Parameter	Pre - Qulification Criteria Requirements - Implementation Partner	Supporting Documents required	Compliance (Yes/No)
1	Criteria related to Incorporation of the firm and Legal Entity	1. The Bidder should be a legal entity registered in India under company's act 1956 (such as Private Limited Company, Public Limited Company, Limited Liability Company, Partnership Firm or any other similar business entity) and should have registered offices and operations in India. 2. The bidder should be operational in India in the business of " ERP Implementation projects" for at least last five financial years and should have an active partnership agreement in India with the OEM of the proposed ERP solution to IIMK.	Certificate of incorporation or other relevant certificate, PAN, GST Documentary proof	
2	Criteria related to Financial viability Sales turnover & Net worth and Profitability	1. The bidder should be a profit making entity for the last 3 financial years from India business 2. The bidder should have an average sales turnover of at least INR 50 Crore over last 3 financial years from India business	Audited Financial statements for the financial years2018-19, 2019-20,2020- 21 or Certificate from Chartered Accountant	
3	Criteria related to Government regulation	The bidder, OEM and other Sub Contractor partners should not have been black-listed by Government of India /State Government/ Public Sector Units at the time of bid submission	Self-Declaration letter on company'sletter head signed by company's authorized signatory	

4	Criteria related to quality of service	Bidder should have valid CMMi level 3, valid ISO 9001: 2008, ISO / IEC 20000 and ISO 27001:2013 at the time of bid submission.	Copy of Certificates	
5	Criteria related to providing implementation and Integration services	1.The Bidder should have completed minimum two ERP projects in India from the same OEM proposed to IIMK during the last 3 financial years with value of minimum INR 5 Crore each (includes only ERP license & implementation cost and NOT hardware and post implementation support cost).	(Copy of Work Order or Company Secretary certifying project details) AND (Implementation completion certificate OR Reference Letter from client for the projects OR Certification from OEM)	
6	Criteria related to Support	The bidder should have two ongoing ERP support contracts for ERP implementations in India of at least 10 seater support team. The bidder should have employee strength of at least 100 employees on his payroll working on ERP from same OEM proposed to IIMK	Self-Declaration letter on company's letter head signed by company's authorized signatory. Reference Letter from clients for the projects	
7	Criteria related to contract with OEM, OEM agreement	Bidder have to be an ERP Vendor (OEM) or authorized Global Service provider, implementation and support partner of OEM for the proposed ERP Product as on date of submission of the Bid	Letter from OEM	

Prequalification criteria for ERP Solution – ERP Software

#	Parameter	Pre - Qulification Criteria Requirements - ERP Package	Documents Supporting required	Compliance (Yes/No)
1	Technical criteria for integration	ERP should have Human Capital Management with Payroll, Finance & Accounts, Procurement & Inventory and Student Information System modules. **All the modules must be from the single OEM and must be a single integrated ERP.**	Self-Declaration letter on OEM's letter head signed by OEM's authorized signatory	
2	Criteria related to Hosting Model	The Proposed ERP solution must be hosted totally on Cloud model. **Hybrid model is not acceptable**	Self-Declaration letter on OEM's letter head signed by OEM's authorized signatory	
3	Technical criteria on operability	Proposed ERP solution should support operating system either Linux or Unix or Windows.	Self-Declaration letter on OEM's letter head signed by OEM's authorized signatory	
4	Criteria for Localization of the product	Proposed ERP solution must be the country specific version for India with all statutory requirements incorporated and should have a localization support in terms of GST, Income Tax and all other taxes, duties, India Payroll etc. which are specific to India and shall comply all Government of India statutory requirements. Reference of localization modules in two implementations.	Self-Declaration letter on OEM's latter head Reference letter from client for the projects	

| 5 | Criteria for advanced Technological capabilities | Proposed ERP should have In Memory (Online Transaction Processing – OLTP + Online Analytical Processing – OLAP) Integrated with ERP.

 Analytical functionalities embedded in the system

 Work flow, web portal, mobile and integration frame work should be integrated with proposed ERP.

 Reference of two implementations using the above technologies | Self-Declaration letter on OEM's letter head

 Reference Letter from client for the projects | |

Table 5 : Pre-Qualification Criteria

2.1.2 Technical Bid

The Technical bid should be complete and should contain all information asked for, except prices. And also indicate that all products and services asked for are quoted. IIMK, at its discretion, may not evaluate a Technical Bid in case of non-submission or partial submission of technical details. It is mandatory to provide the technical details in the exact format as given in the document. The relevant information, printed brochure, technical specification sheets etc. should be submitted along with the offer.

Technical Bid Evaluation is based on the Compliance and Technical Evaluation Criteria. Based upon the final technical evaluation scoring, short listing would be made of the eligible SIs / bidders

Compliance:

The SI/ Bidder should submit the compliance for the following documents and also

other Annexures / details as per format given

- Functional Requirement Specification (FRS) – Annexure I
- Technical Requirement Specification (TRS) - Annexure II
- POC - Annexure III
- Project Resources - Annexure VI
- Training – Annexure VII
- FRS Compliance - Annexure VIII

Bidder is expected to understand the FRS, TRS, POC, PQC, Project Resources, Training and all other documents and submit the compliance against each items. IIM-K reserves the right to disqualify any bidder if functional requirements are not met. IIMK at its sole discretion may reject the bid with technical deviations/ variance. Any noncompliance if felt by technical evaluation committee may lead to disqualification

Technical Evaluation Criteria (TEC)

	Technical Evaluation Criteria - ERP		
#	Description	Details	Vendor Response (Yes=Full marks, No=0
1	**Credentials of OEM** OEM has a turnover of INR 50 crores in India during last three financial years	Bidder must provide OEM's Audited Financial statements for the financial years 2018-19, 2019-20, 2020-21 or Certificate from Chartered Accountant	03
2	**Evaluation as per Technical Requirement Specification (TRS) in Annexure II** Extent of Product meeting the functionality mentioned in ERP – Technical Specification (90 % Compliance)	Bidder must provide documents from OEM	05
3	**ERP product Version support** The ERP product offered is the latest version and is supported for next five years	Bidder must provide supporting document from OEM	02
4	OEM's ERP modules (with 3 of following -Human Capital Management (HCM) with Payroll, Finance & Accounts and Procurement & Inventory) proposed to IIMK are already deployed and gone "Live" at 5 customers globally during last five financial years.	Bidder must provide Work orders of OEM's specifying license quantity details and Work Completion Certificate from client for the said modules	07

5	OEM's Student Information System (SIS) proposed to IIMK is deployed at five customers globally during last five financial years	Bidder must provide Work orders of OEM's specifying license quantity details and Work Completion Certificate from client for the SIS mentioning the sub modules covered	08
6	OEM's Student Information System (SIS) proposed to IIMK is deployed at one higher educational institute IIT, IIM or IISc **in India** during last 3 years	Bidder must provide Work orders of OEM's specifying license quantity details and Work Completion Certificate from client for the SIS	10
7	**Self Service & Dash Board Functionalities** Proposed ERP should have at least one implementation of ESS, MSS , Web portal capabilities, Mobile and Analytics in India or abroad	Bidder must provide Work orders of OEM's specifying license quantity details and Work Completion Certificate from client for the said modules	05

	Technical Evaluation Criteria – System Integrator / Implementer		
#	Description	Details	Max Marks
1	**Credentials of system Integrator** Organization , Annual revenue, Bidder's solution, project plan, project management, governance, execution methodology, proposed implementation and support team Bidder to present these details and also submit in technical bid	Project Plan, Methodology, Deliverables with Resource Loading, Proposed Implementation Team and Proposed Support Team details submitted by the bidder	02

2	**Proof of Concept Demonstration** Product demo, Proof of Concept presentation of scenarios mentioned in POC document – **Annexure III** – Academic system, Payroll, Finance and Accounts, Payroll, Procurement and Director's Dash board	Scoring based on the Proof of Concept and detailed presentation on the solution during the demo	10
3	**Compliance of Functional Requirement Specification (FRS) - Annexure I** Compliance sheet of meeting the functionality of FRS - **Annexure I** submitted in the Technical bid	Scoring based on meeting the functionality in FRS submitted in the technical bid	25
4	**Non-functional Capabilities** [General Application/Solution Requirements, System Administration & Maintenance Capabilities, Reporting Capabilities, Integration Capabilities, End User Compatibility, System Performance, Environments, Security Capabilities, Conversion Capabilities, Extensibility Capabilities, Project Management Capabilities, Tools, Accelerators& methodologies used for process automation and productivity	Scoring based on meeting the functionality Non Functional Capabilities in FRS- Annexure II submitted in the technical bid	02
5	Bidder (SI) has already implemented (and "gone live") ERP modules proposed to IIMK (any 3 of following-HCM with Payroll, Finance & Accounts, Procurement & Inventory, and SIS) at 2 customers in India during last 5 financial years	Copy of Work Order and Implementation completion certificate/Reference Letter from client mentioning the modules	05

6	Bidder (SI) has already implemented (and "gone live") ERP modules proposed to IIMK (any 3 of following-HCM with Payroll, Finance & Accounts, Procurement & Inventory ,SIS) at 1 customers in India from Public Sector Company/Government Organization/Government Department during last 5 financial years	Copy of Work Order and Implementation completion certificate/Reference Letter from client mentioning the modules	05
7	Bidder (SI) (or their Sub Contractor) has already implemented (and "gone live") Student Information System (SIS) proposed to IIMK at one higher educational institute – IIT, IIM or IISC in India during last 5 financial years.	Copy of Work Order AND Implementation completion certificate/Reference Letter from client mentioning the sub modules in SIS .	08
8	Specialized Technical Capabilities one implementation Employee Self-service , Student self Service portal integrated with ERP Implementation experience Analytics and Mobile App integrated with ERP implementation experience Data, Application and system Integration with ERP capabilities and experience	Reference and case studies of implementations and consultants experience and technical strength	03

2.1.3 Price Bid

The vendor has to submit the price bid as given in the format in Annexure IV . The Price Bid of only those bidders shall be opened who have been technically qualified on the basis of the technical bid. Passing criteria for Technical Evaluation is 70%. In addition to this bidder should successfully demonstrate the POC. Those who meet passing criteria of 70 % and POC only will be technically qualified. The bidder needs to fill up the rates, downloaded for the Price Bid (In Excel format) in the designated cell and upload the same in designated location of BOQ.

Price Bid to include Total Landed costs –including implementation, application support, development/enhancement and warranty support for the duration as specified in the RFP

including all applicable taxes . Any increase or decrease in the rates of the applicable taxes, duties or any new levy on account of changes in law shall be to the account of IIMK.

2.1.4   Selection Process

All Bidders who are technically compliant, successfully demonstrated POC and who get 70% marks in Technical Evaluation criteria evaluation only will be considered for price bid evaluation and will be put for Quality and Cost Based Selection (QCBS) formula
The formula for QCBS is as below:

Technical Bid: The bidder scoring the maximum marks in technical evaluation will be called T1. Each of the bidders scoring below it will be awarded a score as below:
A: (Marks scored by bidder being evaluated * 70)/ (Marks scored by T1)

Price Bid: The price quoted by the bidder will be added to the price obtained from OEM for the solution architecture and BOQ suggested by the bidder to workout the total price. This will be the total price of the bidder for the proposed solution Among the bids obtained, the bidder who has the lowest total price will be called L1. Each of the bidder submitting bids higher than L1 will be awarded a score as below:
B: [L1 Amount * 30]/ [Bid Price of bidder being evaluated]
If T1 and L1 belong to same bidder, then it is selected as the winner of project. Else, A+B is calculated for all bidders and the bidder with highest A+B score is selected as winner of contract for project).

IIMK reserves the sole right to reject or accept any or all bids, whether solicited or unsolicited.

3. Scope of Supply and Services

3.1 Scope of the Project

IIMK is in the process of implementing ERP Solution to cater to its Administrative and Academic operations. The Successful Bidder should be capable of configuring, customizing, deploying, and supporting integrated solution for the suggested functionalities/modules, which also includes below mentioned activities:

1. Understand IIMK's Business , Management & Operational Requirement as given in the FRS in Annexure I
2. Detailed functional and system requirements study and system design
   - AS IS and To Be Study
   - Business Blue Print

3. Solution Architecture, installation, phase-wise implementation of application and modules, configuration, customization, integration, testing and support of ERP Solution and provide interfaces required for the ERP Solution.

3. Testing
   - Unit Testing
   - Integrated Testing
   - Stress and performance testing
   - User testing
4. Training and Documentation
   - Providing required training to identified end users and core users with hands on training with training aids
   - Preparations of user manual
   - Training Policy makers for using MIS reports, dashboards and self-service portals
   - Training on system admin, application development in ERP, developing reports, Mobile App development, Analytics, development of dashboard and workflow applications for in house IT staff
   - Training end users Student, Faculty and employees on self-services portals, workflows and all functionalities and applications
   - Documentation of the Functional requirements, technical requirements, configuration documents, use cases and training manuals
5. Data Migration
   - Formulating and implementing Data migration strategy
   - Assuring Data Quality , Quality check
   - Migration of all masters and open transaction from the legacy system to the ERP environment

6. Cutover and Go-Live

   Formulation of Cutover strategy and Go Live and support

7. Post Go-Live Stabilization

   - Stabilization and handholding support of 90 days from actual Go-Live of each phase. Managed Services (Application Management, Incident Management) should be ready by this stage

   - Facilitating user adoption by hand-holding support for 3 months after post Go live stabilization of two phases

8. Warranty, Maintenance and Support Service

   - On site ERP application support including handholding users

   - Database and OS performance tuning, back and recovery, bug fixing etc.

   - Providing Managed Services (Application Management, Incident Management) for the period of contract including centralized helpdesk for a period of Five (5) years, after post Go live stabilization of each phase

   - Ensuring OEM support for upgrade, patch management, performance etc.

   - Documentation Support: update document based on changes

   - Refresher training

9. Change Management including training of users for effective use of the system and handholding support

10. Risk Management strategy and support

11. Project Management and Project Governance Structure for monitoring and adherence to Implementation Plan

12. Technical Services

   Bidder has to provide Cloud architecture for Production, Quality and Development systems with storage, backup systems supporting database and operating system. The system architecture should be validated by OEM. The sizing should be based on the tools of OEM. The system proposed should also have high availability without any single point of failure, scalability and serviceability. **The system Infrastructure needed during the project phase (Sand Box) to be provided by the SI and to be included in the technical bid, this should be based on cloud model.** The bidder should recommend on the database and OS for ERP. The bidder should also support IIMK in getting the best solution.

   General Scope
   The proposed solution should support the following requirements:

Technology

   - User should be able to access the ERP package through portal, mobile, tablet, Laptop and desktop PCs. The ERP package should have integrated Student Self Service, Faculty Self Service and Employee Self Service portal / system and should be user friendly

   - Secured web access

   - Linguistic support (Hindi)

   - Dash board with more graphical forms

- Digital Signature for selected functions
- Tools for Analytics development
- Signed document flow to be supported with workflow of approval hierarchy
- Integration with web portal and other legacy applications not covered by ERP

Integration

The solution should support the following integration with other systems

- ♦ Biometric attendance / Facial detection system for staff and student attendance
- ♦ Email and SMS integration for alerts and notification
- ♦ Payment gateway integration for fees and such other transactions ,Smart card integration
- ♦ External Document Management System.
- ♦ Legacy application integration based on open standards
- ♦ Learning management system based on Moodle system.
- ♦ Library Management system based on KOHA system.
- ♦ Applications like Faculty credit management system, elective bidding system,accreditation management and ranking system etc. 3.2

Roles and Responsibility

The responsibilities matrix given below defines the responsibilities of SI and IIMK. The table is indicative and not exhaustive. The responsibilities matrix shall be finalized during award of the contract.

SN	Task	Responsibility
1	Functional / system requirements study and system design	SI
2	Design of cloud architecture and network / WAN for acess from IIMK	SI
3	Procurement of Networking WAN equipment	IIMK
4	ERP Package installation, configuration, customization, Application development and implementation	SI
5	Training and Documentation	SI
6	Testing	SI and IIMK
7	Data Migration	SI and IIMK
8	Cutover and Go-Live	SI
9	Post Go-Live Stabilization	SI
10	Hand-holding	SI
11	Support	SI

Table 7: Overview scope responsibilities

3.3   Scope of Activities

The main scope of activities for this project are given in the following Annexures

- Functional Requirement Specification - FRS Annexure I
- Technical Requirement Specification-TRS Annexure II
- Application and Integration – Annexure I_FRS_IIMK_Application and Integration
- The Integrations identified during the design phase also be in the scope
- The functionalities (mentioned in our FRS) which are available in the ERP is to be implemented in ERP and the functionalities not available in ERP has to be implemented either through customization   or as new application.

IIMK conducts 4 Post graduate residential programs namely PGP,PGP-BL,PGP-LSM and PGP-Finance. All these programs are two year residential programs except PGP-BL which is one year.The process for PGP, PGP-LSM and PGP-Finance are the same . For PGP-BL the process is more or lesss same as PGP with few differences. All the four programs are to be implemented. The details are mentioned in Annexure I of FRS for PGP. The differences are also mentioned.
Self service portal for PGP should have 4 independent portals for PGP, PGP-LSM, PGP-Finance and PGP-BL. The executive PGP online Kochi and FPM to have seperate self service portals.The details are mentioned in Annexure I of FRS

These specifications are indicative, actual requirement gathering done by the SI after award of contract and the final signed off documents during design phase would qualify as actual scope of work. The Integration and developments identified during the design phase also be in the scope.

3.3.1 Cloud Architecture for Primary and Disaster Recovery Site

The SI will have to do the cloud sizing needed for the ERP They should also help IIMK in designing the WAN to connect to cloud ERP. SI also has to provide the cloud architecture of the system for both Primary and DR site.These should include Dev,QA and Production Systems. The system should have high availability, scalability and good response time. The system proposed should be approved by OEM. The SI should also provide the IT infrastructure (Sandbox) in cloud during the project implementation and this also to be included in the Technical bid

3.3.2 Solution procurement, installation, implementation configuration, customization, integration.

ERP License

SI to recommend ERP and associated systems and IIMK shall procure directly from OEM. The solution should be based on **cloud ERP. The licenses should include core system,** Student information system, Faculty, student and Employee Self services portals, mobile platform, Analytics, payroll, Country India specific statutory functionalities. Bidder has to propose Solution Architecture, license count of the proposed Cloud ERP so as to ensure that all the functionalities required by respective users can be performed.

An indicative number of users for current functionalities have been provided in section 1.6 table 4. **The Vendor to provide the Source code of the ERP package and applications developed to IIMK**

SI has also to ensure that product documentation to be supplied for software provided under this project and shall include but not limited to the following.

- Installation guides
- System Administrator & User manuals.
- Technical manuals
- Toolkit guides and Troubleshooting guides
- Source code

ERP Solution Implementation

Based on signed off Business Blueprint document (BBP) documents, the bidder has to implement the following functionalities/modules through ERP products:

- Human Capital Management (HCM) & Payroll
- Financial Accounting and Control Management
- Asset Management
- Purchase and Inventory Management
- Student Information System (SIS) and Academic administration
- Employee Self Service and Manger Self service
- Portals like Placement, MDP, Alumni, Placement, Consultancy, Library etc.
- Students, Faculty and staff Self Service Portals
- Policy makers Dashboards
- Document Management system

1. Phase wise implementation of modules is mentioned at Table 1

2. SI shall configure the specific core modules, third party applications and develop interfaces & bolt-on functionality wherever and whenever necessary.

3. SI shall ensure that the proposed system is able to integrate with future applications based on industry acceptable standards. Such interfaces shall follow standards such as Application Programming Interface (API's) and web services.

4. SI shall install database, operating software and other related software, integration t oo ls, along with the customized source code and requisite licenses. The SI shall also explain and document the process for installing and operating the same.

5. The system must possess easy-to-use user interfaces, able to perform tasks with minimum user interactions where ever possible.

6. SI should design the interface either real time or batch jobs for the smooth operation of the Core and Non-Core functionalities wherever required

7. SI must furnish contract agreements with other vendors whose products or services the SI would obtain.

8. SI is expected to customize the screens, design and layout of the applications depending on the Requirements of IIMK

9. SI has to provide IIMK the source code, training and documentation of all developments carried out from IIMK.

Application and Integration

1. The scope of Applications and integration are mentioned in FRS. The functionalities / applications which are part of core systems and core academic system of ERP are to be configured in ERP. Any applications / core functions which is not configured or customized in ERP is to be developed by the SI. Few supporting applications which are not of core functionality shall be developed by in house IT team of IIMK. The SI should provide training on Mobile, portal and application development and provide support to in house IT staff during the development of these applications. The SI should also integrate the system with ERP. This should be included in the Technical bid

2. All Workflows mentioned in FRS which are part of core systems and core academic system of ERP are to be a configured in ERP. Any workflow which is a part of core functions and which cannot be configured / customized in ERP is to be developed and integrated by the SI. Few supporting workflows shall be developed by in house IT team of IIMK. The SI should provide training on workflow application development and also provide support to in house IT staff during the development of these workflows. The SI should also integrate these in house developed workflows to Core ERP system. This should be given in the Technical bid

3. The standard reports and displays available in the ERP to be used. Other reports to be developed by SI . The SI should provide training on report application development and also

provide support in house IT staff during the development of few reports. The SI should also integrate these in house developed reports to Core ERP system.

3.3.3 Detailed functional and system requirements study and system design

1. The vendor shall implement the system which shall meet all functions mentioned in Annexure 1- FRS. The FRS is indicative in nature and necessary functions identified during design stage also to be incorporated

2. The vendor shall do series of workshop and study with stakeholders and project team of IIMK and formulate detailed AS-IS study and To-Be Process analysis. Based on this they shall prepare a Business Blueprint document (BBP) and System Design Document (SDD) covering complete functional and technical requirements of IIMK . All Processes are to be captured and documented in flow chart format. While preparing the business blue print. The document has to be discussed and finalized with IIMK team and vendor has to obtain a sign-off from IIMK. SI should bring their best consultants so that a review of processes, suggest improvement and optimization needs can be identified. Also they can recommend the best practices adopted.

3. The SI shall perform a current business study and prepare a Business Blueprint ("As-is", "To-be" and "Gaps") report with required process definition and flow diagrams, process enhancements and gap- fitment analysis to map all business requirements of IIMK in the ERP solution as per the functional scope.

4. The SI needs to follow **Show and Tell** approach to get alignment on how business processes will run on ERP to fast track design. Indicative expectations and gaps have to be presented for illustration.

5. IIMK will constitute a project governance structure with adequate representation from all the stakeholders to review the recommendations of the bidder and accord necessary approval for the Business Design report and the new improved business processes to be adopted.

6. Business Design Objective, approach and methodology should ensure the following five steps

Simplification and Standardization of Processes: Processes of all IIMK functions / academic areas (Courses – PGP, EPGP, MDP, Academics, Finance, Administration, etc.) need to be studied and simplified into logical steps at first. All processes need to be depicted into simple flow diagrams with clear linkages. This will help in reviewing some of the old manual practices in view of the integrated system scenario of the future. SI also needs to explore the standardization of processes across all IIMK functions/ areas.

Elimination of Redundant and Non- Value Adding Processes: After simplifying the processes, all processes are to be reviewed to eliminate the redundant steps and practices. Non- availability of information across the IIMK's functions / areas results in some repetitive and redundant activities in a manual work environment. These are to be optimized.

Value Addition: After eliminating the redundant processes, **improvement of processes need to be done keeping in view the standard available processes / practices in the proposed enterprise**

solution software. The primary objective of this step is to enhance functional efficiency and process performance. This is the most important phase which will have a strong bearing on the overall performance of the final solution.

Automation: After finalizing the "To-Be" process map, automation through standard enterprise software should be done. Configuring the "To-Be" processes in the system should be able to address all the defined requirements. All the information related to requirement and potential design of the solution needs to be well documented and baselined as part of the business blueprint signoff. This needs to be handled using a proper document management system which will continue post go live as well.

Realizing Business benefits: **The processes and system needs to be configured so that benefits of ERP Implementation can be realized by IIMK**. Some of them includes:

- Optimizing operating expenditure
- Working capital and cash flow management
- Planning and budgeting
- Profit center accounting
- Capital asset monitoring and accounting
- online MIS reports
- Tightening of payment terms and revenue cycle
- Compliance to regulation
- Cycle time improvement
- Work flow automation of processes
- Analysis of student data eg attendance, assignment submission, access   to study portal average vs actual
- Automation of processes
- Real time visibility of Data
- Better user experience
- Scalability
- availability of all data and transactions

7. Along with business blue print vendor has to prepare a comprehensive Systems Architecture and design document. This should include

    Solution Architecture Security

     Architecture

    Application Functional architecture

    User input screens including data entry requirements Format of all reports

    Access control, logs

8. The vendor shall conduct workshops, give detailed presentations on the solution landscape, which will include the following

    Gap analysis, best practices and specific recommendations for adoption of new improved operating processes by IIMK.

    Reduction in cycle times

    Benefit that can be realized with ERP with KPIs

    Change-processes and the importance of organizational alignment

    User Information Self- service, Dashboards, MIS reports, Analytics Access

    using various devices mobile, handheld devices etc

9   The functions which cannot be met by standard functionalities should be made available through customization or development. The document has to be signed off by the users / stakeholders of IIMK

10   **OEM to conduct two audits, the first audit after the business blue print and second audit before Go Live. The audit is to be conducted for two modules - Finance and Academic functions module. The SI to include OEM Audit also in the Technical bid**

3.3.4 Training

The purpose of the training is to ensure that all users are adequately prepared and able to perform their job functions using the system. The Vendor is expected to provide following services, but not limited to:

1. SI shall prepare training strategy and training material for acquainting functional and technical stakeholders with the usage of ERP Solution Suite functionalities/modules and application.
2. Conduct class room and hands on trainings. These shall include for training for the trainers, end users, power users, system administrators, students, Faculty, policy makers and other stake holders suggested by IIMK.
3. It is expected that the training structure, manuals and documents will be different for different levels of stakeholders and functions to suit their needs.
4. Training will be at IIMK premises and all infrastructures like computer, projector will be provided by IIMK.
5. Training material in soft copy to be provided by SI.
6. The batch size of each training to be decided during the project implementation.

Details of Training requirements are given in Annexure VII

3.3.5 Testing

Overview of testing

The vendor shall   prepare a testing strategy which will include testing plans, schedules, testing methodology and also p r o v i d e   details of all tests namely Unit Tests, System Integration tests, Stress / Performance tests and final User Acceptance Test. The test results during various tests have to be documented and submitted to IIMK for approval. Vendor has to ensure deployment of necessary resources and tools during the testing phases. Vendor has to submit the test result at each stage and this should be signed off by user before proceeding to the next stage

3.3.5.1   Unit Testing:
The purpose of unit testing is to test the individual module and validate its functioning as per the system design. Unit testing shall include testing of transactions and functions within modules

and scenario testing for testing with test data of all operating processes with scenarios. The unit testing shall cover all the developed objects as part of configuration/customization

3.3.5.2 Integration and System Testing:

The purpose of the integration test is to test the end-to-end transactions flowing through integrated components, including simulation of live operations, and analyze the results that are important for the functional verification. Integration testing shall focus on cross-functional integration points, as well as end-to-end operational processes

3.3.5.3 Stress & Performance Testing:

After the successful completion of the system integration testing, load, scalability and stress testing would be conducted prior to commissioning & Go-Live as part of performance testing. The Vendor / SI has to ensure the following performance level for the ERP Solution:

S. No	Key Performance	Values
1	System response time	< 4 sec for standard task; <7 sec for complex task.
2	Report generation time	<15 sec for standard reports; < 1 min for complex task
3	Load Handling Capacity	50% of the total user base at all times with an exception of handling 110 % of total user base at peak times

Table 8: System response time

The SI should validate performance testing before implementation. After successful completion of performance testing vendor should submit a report which would include but not limited to test cases, result and response time.

3.3.5.4   User Acceptance Testing:

During the course of installation, configuration, customization and development, the SI has to perform acceptance testing for each of the functionalities/modules and integrated system along with the end users of IIMK. The system shall be considered as "accepted", if the end users confirm and sign off that the individual unit and integrated system is functioning as per the requirements. Authorized representative (s) of the end user will provide the signoff for the functionally tested.

3.3.6 Data Migration

Migration of data from the existing legacy system to ERP system is the responsibility of the SI. The SI has to develop Data migration strategy. Where Data is not in digital form and is needed for ERP, SI has to develop templates and help IIMK staff in collecting data. IIMK shall

digitize and provide the data in the required format for uploading into ERP System. **All old Students, Faculty, staff records, all academic data and financial data are to be migrated to the new system**. Data shall be migrated from the current application to the new application prior to the 'go-live' of the system by the SI.

The following are the data to be migrated from legacy to ERP system

1. **All current and old students, Faculty, Staff, Contractors and Retired employees data. All current and old academic and financial records.**
2. All Account Masters , Vendor Masters, Bank Masters and other Masters
3. Open purchases , open sales orders, open Invoices and open balances
4. Inventory data , Project data , asset data
5. All data for statutory and legal purposes
6. 9 years of Finance data to be migrated from Tally system 9.0 to ERP
7. The digitization of old documents not in digital format shall be done by IIMK

The list is only tentative and any data identified during design phase and is needed are also to be included. The responsibility matrix for data migration is as given below

Sl No	Activity	Responsibility
1	Data Migration strategy	SI
2	Migration tools	SI
3	Data Validation and cleaning	IIMK supported by SI
4	Data template for data collection	SI
5	Data collection in Template	IIMK
6	Data Migration and Testing	SI

Table 9: Data Migration

Any other necessary data which is required but identified during project implementation will also be part of the scope. Bidder shall conduct the acceptance testing and verify the completeness and accuracy of the data migrated from the legacy systems (or in template) in test / QA environment prior to migration to production environment to the proposed solution.

3.3.7 Cutover and Go-Live

The Bidder will have to prepare a detailed cutover strategy which should contain the following

- Detailed data migration steps
- Method of handling data elements and open items
- Dates of black out period ie non availability of legacy system
- Help desk procedure , Incident Management system and support

The SI is required to undertake the following to review readiness for "Go Live":

- Facilitate in setting up central help desk for any queries
- Review the health, usage and performance of the system till it stabilizes
- Ensuring resolution / Documentation of all issues raised during implementation
- Final configuration/ integration, volume and stress testing
- Switch over to production environment
- All roles and authorization are approved by IIMK

OEM to conduct audit of Academic and Finance Modules before Go Live. SI should incorporate the audit observations before Go Live. SI will have to submit a Go Live readiness report and get approved by IIMK.

Go-live for the ERP modules and applications shall be considered completed only when
- The implementation and testing of ERP applications has been completed and signed off by IIMK
- All Functionalities have been successfully tested
- Data migration is completed
- The identified users have been trained on relevant modules
- Users are able to pass transactions in the new environment
- GL balances tally with that of the legacy applications (as applicable)
- Data at legacy system and new environment are validated and matches
- Incident Management system is ready to log the incidents

System will be "Live" only when IIMK stakeholders carry out normal day to day transactions in the Production system.

3.3.8 Post Go-Live Stabilization

The BIDDER shall have a post Go-Live stabilization and support strategy. This should include the following
- Handholding the users
- Post "Go Live" Monitoring
- Post "Go Live" review
- Fine tuning the system

SI shall provide user adoption / handholding support for three months after GO Live of each phase.

3.3.9 Hand-holding

SI shall provide user adoption / handholding support for three months after GO Live of each phase. The Support offered should include the following
- Hand holding support
- Deployment of required Technical & Functional consultants at site for Three (3) months

for post Go- Live stabilization support.

- Provide specialist resources for all in-scope areas to close the gaps identified during this period.

Hand holding and stabilization are two aspects in this phase. Handholding should be for three months. Stabilization would be complete if the system runs smoothly for one month without any major issues. AMC will start after the handholding and stabilization phase.

3.3.10 Annual Maintenance Contract Support (AMC)

AMC Support services are expected to be provided by the SI on an ongoing basis, throughout the period of the contract. The support period will commence after the post Go- live stabilization period. The support services include but not limited to:

- Application Management Support Services
- Incident Management-Helpdesk Services
- Annual Technical Support for ERP Software in coordination with OEM
- Change Request Management

3.3.10.1 Application Management support Services

The SI has to provide the following support services

- Performing client Installation/Reinstallation (ERP Solution Suite)
- Performing vendor/OEM interaction for resolving application related issues
- Performing performance tuning of applications
- Performing Access Management
- Performing periodic review of access and take corrective actions in consent with IIMK
- Performing patch updates and software updates for in-scope application
- Resolving issues related to report generation, report creation, report customization, incorporating any change in India specific taxation rules etc.
- Resolving migration related issues
- Performing any other day-to-day administration and support activities
- Coordinate all the issues relating to the software up to closure.

SI has to provide relevant resources for the entire support contract duration. **This details of support and core team structure also to be included in the Technical**. SI can adopt onsite and offshore model and should be mentioned in the technical bid

3.3.10.2 Incident Management-Helpdesk

The successful System Integrator shall provide adequate resources. The helpdesk shall function as a point of contact for providing facilities, associated technologies/tools, calling facility, and fully trained resources to respond to calls. The structure of centralized onsite and offsite support resources / team will have to be included in the technical bid. The support activities during both Implementation and Support should be headed by a Manager.

3.3.10.3 Annual Technical Support (ATS) for Software

IIMK shall procure ERP Software licenses and ATS from OEM. The OEM need to have 24X7 support infrastructure available to cater to any technical issue. SI should facilitate with OEM in resolving all service and support issues of IIMK with OEM.

3.3.10.4 Change Request Management

After Go live SI is expected to perform application changes, improvements and development as per the needs of IIMK. IIMK will be provided with a certain man hours in annual support for all the user needs. If a change is needed during the AMC period, SI will estimate the effort required. IIMK will finalise the effort in consultation with the SI. If the effort estimated less than seven man days, the change will be made as part of AMC. if the effort estimated more than seven man days,the change will follow a change management process. SI has to submit rate card in the Price Bid.

3.3.11 Service Window

Support service will be from 9 AM to 5.30 PM on Mon to Friday. For severity level 1 issues support will be 24 X 7

3.4 Acceptance Criteria

3.4.1 Software Acceptance

The System implemented by SI would be deemed to be completed when all the following conditions are fulfilled and acceptance/sign off is obtained from IIMK on the same:

a. Sign off Business blue print documents
b. Sign off on all Functional design, technical design and System design documents
c. Sign off on user and system configuration manuals.
d. Sign off on the documented changed functionality and process.
e. User acceptance testing sign off on the system functionality.
f. All Satisfactory tests completed with no showstoppers. User is able to work and process data as per the requirements. 100% of the agreed Requirements specifications are completed.
g. Validation of data migration results.
h. Successful end-to-end completion of the in scope processes
i. Training provided to all identified users

3.4.2 Go-Live, Post Go-Live Stabilization and Hand Holding Support Criteria

Sign off from respective functional user groups

3.4.3 Performance Criteria

a) IIMK shall carry out technical inspection and performance evaluation of products and services offered by the System Integrator (SI).
b) The Post Delivery Inspection shall be conducted either for all or critical components of entire solution. During the inspection, if any discrepancies/ defects are found either in systems / applications, the SI shall undertake to rectify/ replace such systems and applications at their cost.
c) The SI has to conduct the following activities and submit relevant reports to IIMK
  - Performance evaluation tests for hardware sizing as well as response time for all types of

transactions

- Satisfactory performance of the entire solution as per the set criteria
- Technical training completion for identified employees

The SI will be accountable for maintaining the system within the SLA tolerances even at peak load. IIMK has the right to encash the Bank Guarantee in case of performance not meeting to IIMK's requirements

3.5 Project Governance

1.   Considering that the Governance and Project structure are important aspects for the success of ERP implementation, IIMK plans to have the following three tier structure for governance of ERP implementation:

a) Apex Committee

Proposed Structure: IIMK will communicate the structure during the project Implementation.

Apex Committee will provide support and guidance for the ERP project

b) Steering Committee

Proposed Structure: IIMK will communicate the structure during the project Implementation. The Steering/ERP Committee will monitor the implementation of the project and   provide the following support:

- Provide strategic direction and guidelines
- Ensure overall alignment between IIMK and SI
- Track milestone and monitor the progress of the project
- Issue resolutions
- Motivating and encouraging the project team
- Regular   communication with the organization on the importance and progress of the project
- Developing change Management and Project execution strategies
- Resolving issues if escalated
- Approve/reject project management team's report and recommendation
  Steering Committee will also periodically update the progress of the project to Apex Committee.

c) Project /Core Team

The System Integrator (SI) shall deploy the following team onsite at IIMK
Project Manager to IIMK till the completion of the ERP
Project Functional consultants in each area.
Development Programmers
Mobile Application Developer
Analytics consultant

Project Manager: The Project Manager assumes overall responsibility for the assignment and ensures that all resources required are made available and the engagement is carried out according to agreed plans. He shall function as the primary channel of communication for all IIMK's requirements to the implementation team.

Functional Consultants: The Functional Consultant shall ensure total understanding of the business and ERP Solution modules implementation approach. He / She shall effectively customize the various components of ERP Solution as per user requirements and shall also document the processes and procedures relevant to the assignment.

Development Programmers: The primary role of Development Programmers shall be to meet the requirements as specified by the Functional Consultants. He/she shall ensure that the developmental activities are in conformity with the quality guidelines and customer specifications as mentioned in the requests. He shall also ensure thorough testing and validation of the changes proposed and supports the functional team.

The resources deployed should be preferably certified consultants / programmers and having implementation experience in ERP projects. **The qualifications and experience of the Project Manager and Project team members are shown in Annexure VI. The bidder will have to comply this and the details to be shown in Technical bid. No consultants should be outsourced from a different company except for very specialized area of Student Information System and Academic System.In such cases, the SI should take prior approval of IIMK**

SI to submit the proposed resource deployment plan. IIMK will have to approve the SI's resource consultants deputed to IIMK. SI should not remove or replace the consultants / programmers till the end of the project unless it is due to unavoidable circumstances

IIMK would also nominate a project team would having core team members from each functional area. The Chief Systems Manager (CSM) from IIMK would act as the Project leader for the project and core team. BIDDER's Project Manager will be reporting to CSM of IIMK for the Project. Periodic review meeting is a key aspect for timely completion of the project. The schedule and frequency of review meetings to be finalized before the start of the project.

SI would need to set up ERP project office at IIMK premise. IIMK would be providing space and basic facilities. IT infrastructure (desktop and laptop) for the temporary offices need to be set up by the SI. The SI shall mention the support needed from the IIMK for the project office. During project implementation and support, SI is expected to manage their accommodations, food requirement and commuting to IIMK on their own.

4.   Project Plan

4.1 Proposed Project plan

The SI should implement the ERP Solution phase wise as per the schedule of IIMK. Post Go-Live support, handholding and managed services will be a part of this support will be part of this for each phase. **The detailed project plan with activities for implementation of ERP at IIMK for both phases should be submitted along with the Technical Bid**. The SI can propose a combination of offsite and on site model which is best suited for IIMK implementation.

4.2 Project Deliverables

The schedule of indicative activities and deliverables under the Project plan for implementation of ERP at IIMK for both phases are as given in table below. The deliverables listed are indicative and the SI is free to propose any additional deliverable based on their experience delivering similar project. The project will move from one phase to next only on successful completion and sign off of each of the phase. **The bidder is expected to provide a detailed project plan**. After submission of various documents by the vendor during project implementation, IIMK shall respond back within one month.

Phase			
S.no	Key Activities	Completion Date	Deliverables
1	Project Preparation		1. Agreed and Finalized Project Plan 2. Team finalization of IIMK and SI 3. Project office setup 4. Core team ERP over view Training 5. Installation of ERP in Sandbox / development system
2	Requirement Gathering		1. Requirement gathering workshop 2. Functional requirement document 3. System Architecture
3	Business Design : System Designing, System Architecture and Preparation of blueprint document Quality Audit by OEM for Academic and Finance modules		1. AS-IS Process Mapping and Analysis 2. To-Be Process and Gap Analysis 3. Business blueprint document 4. System Design Document 5. Master Data structure 6. Legacy system Integration report 7. Change Management strategy 8. Mobile App , analytics , Portals, Self-service and Portal design

4	Configuration & Customization		1. User training on Configuration 2. Configuration Document 3. Technical Design Document 4. Authorization and Security
5	Interface/Integration building		1. Integration Plan Document 2. Interface Design Document
6	Unit Testing and Integration Testing		1. Testing strategy & Plan 2. Test Cases & Results 3. Unit test , Integration Test and Full load stress test
7	Training		1. Training Plan and Strategy 2. Training curriculum 3. User manual 4. Training Report
8	User Acceptance Testing		1. Testing strategy & Plan 2. Test results 3. Technical documentation
10	Data Migration		Data Migration strategy & plan Data Migration completion report
11	Pre Go Live Audit by OEM for Finance and Academic module		Audit Report from OEM
12	Cut over & Go Live		1. Cut Over & Go Live Plan 2. Backup and DR plan 3. Test Report 4. Functional help manual
13	Go Live		Go Live sign off
14	Post Go Live Onsite Handholding Support	3 months post Go Live Stabilization	1. SLA Compliance Report 2. Project Status Report
15	ERP Application Support	Starting post Go Live Stabilization to end of Contract	1 Server monitoring Report 2 Incident Management 3 Issue/ Incident logs (category, severity and status of call etc.) 4 Incident Management Report 5 Reports to ensure compliance 6 Performance reports 7 Any other report as requested by IIMK

Table 10: Project Deliverables

5.   Payment Terms

All the payment will be based on the milestones achieved. The schedule of payment with key milestone are as given in table 11 below. The price bid submitted by the SI must be in conformity with the payment terms proposed by IIMK. Any deviation from the proposed payment terms would not be accepted. IIMK shall have the right to withhold any payment due to project delays or failure to meet commitments.

Cost Category	Payment Schedule – Milestone	% payment of Implementation Services
Implementation Phase I & Phase II	**Milestone 1** Sign off of Blueprint document. Submission of initial Functional and technical design documents.	20 %
	Milestone 2 Conference room Pilot and UAT Sign off by IIMK	10 %
	Milestone 3 Completion of data migration & User training	20 %
	Milestone 4 Successful Go Live of ERP Functions and implementation of all required interfaces with other applications. Go Live sign off by IIMK. Submission of final Functional and technical design document	25%
	Milestone 5 Successful completion of Post go Live stabilization period and no critical / high severity issues are open Acceptance sign off by IIMK	25%
Support Service Fees	Every Quarter based on SLA reports.	
Enhancement/ Development charges	Any enhancement/development charges will be paid after receipt of invoice along with quarterly support charges	

Table 11:   Payment Terms and Service Level Agreement

6. Service Level Agreement

The System Integrator (SI) shall comply with service levels agreement (SLA) to ensure adherence to project quality and availability of services. The SLA during Implementation and Support are as given below

6.1 Service Level during Implementation

1. The System Integrator (SI) must strictly adhere to the delivery dates or lead times identified in their proposal. As a deterrent for delays during implementation, IIMK may levy penalties for delays attributable to the SI.
2. Penalty based on table 12 given below will be levied for every week's delay in meeting any milestone agreed as part of project plan.
3. Penalty if any will be adjusted against the milestone payment of that phase to SI

Delay	Penalty(Rs.)
Upto 1 week	Grace Period. No penalty
1 – 2 Weeks	0.5 % of Total Implementation Cost of that Phase
2 – 4 Weeks	1 % of Total Implementation Cost of that Phase
4 – 6 Weeks	2.5% of Total Implementation Cost of that Phase
6 – 8 Weeks	3 % of Total Implementation Cost of that Phase
8 – 10 weeks	5 % of Total Implementation Cost of that Phase

Table 12: Delayed Implementation

For a delay of more than 10 weeks in implementation and failure to cure such default within thirty days, IIMK reserves the right to cancel the awarded contract by giving prior written notice of not less than thirty days. In the event of termination IIMK shall pay the vendor for all the supplies/ services rendered to the meeting functionality of IIMK till the actual date of contract termination.

6.2 Service Level during Support Incident Categorization

Fault Tolerance and Penalties (during Working hours)

Severity 1 (Critical)	Severity 2 (High)	Severity 3 (Medium)	Severity 4 (Low)
Operational Failure			
Incidents that result in complete shutdown of ERP.

IIMK users are unable to access the system during critical period such as audit/accreditation, convocation, admissions, exams, result publication, or any other events where external | Incidents that result in total inability of one or more operational activities | Incidents affecting personal work of users and not any major operational activities | Incidents has minimum impact on operations and shall be fixed on lesser priority |

Number of Users Affected			
The application failure affects a large number of users or almost all users and external stakeholders	The application failure affects a large number of internal users.	The application failure affects a small number of users	The application failure may only affect one or two users
Workaround			
There is no acceptable workaround to work around to the problem	There is an acceptable and implementable workaround to the problem	There may or may not be an acceptable work-around to the problem	There is likely an acceptable workaround to the problem.

Table 13: Service Level Support Incident Categorization

The SI shall confirm to the following fault tolerance levels to avoid escalation and subsequent penalties:

Severity Level	Response	Resolution time	SLA	Penalty
Severity 1	30 minutes	4 hours	95 %	2% of Quarterly support charges (per SLA breach)
Severity 2	2 hours	16 hours	90 %	1.5% of Quarterly support charges (per SLA breach)
Severity 3	3 hours	24 hours	90 %	1.0 % of Quarterly support charges (per SLA breach)
Severity 4	4 hours	32 hours	90 %	0.5% of Quarterly support charges (per SLA breach)

Service levels shall be applicable after a stabilization period of 90 days after Go live and continuously improved during the interim period till the end of support period. SLAs will be reviewed at least once every year and may be added/deleted/changed on mutual consent as a result of such review or any new operational/ ERP Services requirements.

The reporting of SLAs has to be carried out on a monthly basis. Bidder shall provide, as part of monthly evaluation process, reports to verify bidder's performance and compliance with the service levels. The total penalty with respect to service level defaults occurring each month will be reported monthly by the bidder. All penalties will be adjusted against the payment to the bidder for that quarter.

Support service will be from 9 AM to 5.30 PM on Mon to Friday. For severity level 1 issues support will be 24 X 7. The service support will have to be a combination of offsite and onsite support Two staff member from SI -one functional and one technical - need to be deployed onsite and all other support will be provided from offsite. The skill / functional expertise of the onsite staff will be decided based on actual requirements. The onsite support staff may not be permanent and can be rotated with a different functional / technical expertise based on IIMK's requirements.

7. Terms and Conditions

1. **General Information**

   1.1 The Complete tender documents can be downloaded from the Ministry of Education's online procurement portal (**https://mhrd.euniwizarde.com/**) or from the Website of IIMK (**http://iimk.ac.in/**). Information on issuance of corrigendum, if any, related to this tender will also be available on E-Procurement Portal and also in the website of the Institute.

      a) Please read all the Terms & Conditions carefully before filling up the document. incomplete Tender Documents will be rejected.

      b) All pages of the Tender Document must be signed by the authorized signatory and sealed with the stamp of the bidding firm as token of having accepted all the Terms and Conditions of this Tender.

      c) Manner of submission of the Bids: The bidder has to submit online bids i.e. Technical Bid and Price Bid through e-procurement portal https://mhrd.euniwizarde.com/ .No manual bid will be accepted. Bidders can witness electronic opening of bid.

      d) The Last date and time for submission of the Bids: At 1500hrs (03:00 p.m) on 16-09-2021.

   1.2 Tenders are to be submitted online through the website stated above. The tender document may be downloaded from website & submission of Technical bid / Price bid as per Tender time schedule.

   1.3 Time and date for opening of Bids: The Technical Bid will be opened electronically at 1600hrs (04:00 p.m.) on 16-09-2021.

   1.4 Pre –Bid Enquiry: Pre-Bid enquiry through ZOOM from 24-08-2021 at 11:00 a.m. only. Bidders who are interested in participating for the Pre Bid meeting can send E-mail to: purchase@iimk.ac.in & epadvisor@iimk.ac.in and the Zoom meeting link will issue to them.

   1.5 Two-Bid system: Under two bids system through e-tendering, only the Technical Bid would be opened on the time and date mentioned above, date of opening of the Price bid will be initiated after acceptance of the technical bids. Price Bids of only those firms will be opened whose technical bids are found compliant /suitable after technical evaluation is done by IIMK.

   1.6 Forwarding of Bids: Bids should be submitted by Bidders furnishing details like valid GST registration number, Bank account details with address and complete postal address of their office & e-mail ID.

   1.7 Modification and Withdrawal of Bids: A bidder may modify or withdraw his bid after submission provided that the written notice of modification or withdrawal is received by the Institute prior to deadline prescribed for submission of bids. No bid shall be modified

after the deadline for submission of bids. No bid may be withdrawn in the interval between the deadline for submission of bids and expiration of the period of bid validity specified.

1.8   Clarification regarding contents of the Bids: During evaluation and comparison of bids, IIMK may, at its discretion, ask the bidder for clarification of his bid. The request for clarification will be given in writing and no change in prices or substance of the bid will be sought, offered or permitted. No post-bid clarification on the initiative of the bidder will be entertained.

1.9   Rejection of Bids: Canvassing by the Bidder in any form, unsolicited letter and post-tender correction may invoke summary rejection. Conditional tenders will be rejected.

1.10   Validity of Bids: The Bids should remain valid till 180 Days from the last date of submission of bid. However, in case of any delay due to genuine reasons, the validity period may be extended further for additional period of 60 days. If any bidder withdraws his Prequalification Bid before the said period or makes any modification in the Price Bid (BOQ) or terms and conditions of the Prequalification Bid, the Institute, without prejudice to any other right or remedy, will be at liberty to blacklist the bidder for a certain period of time.

1.11   Bid Security Declaration: Bidders are required to submit a Bid Security Declaration, as per format attached. The Bidders may be disqualified/blacklisted from bidding for any contract with the Institute for a period of one year from the date of notification of tender if the bidders are found to be in a breach of any obligation under the bid conditions, as indicated in the Bid Security Declaration.

1.12   Performance Guarantee: Within 15 (fifteen) days of the receipt of notification of award/Letter of Intent, the successful bidder shall furnish a performance guarantee equivalent to an amount equal to 3% of the Contract value, in the form of Bank Guarantee from any scheduled Bank. The Performance Guarantee shall be kept valid for a period of 14 Months (to be re-validated for such equal periods for which the contract may be extended after the initial period of 12 months). The Performance Guarantee amount shall be payable without any condition what so ever and these guarantee shall be irrevocable. The Performance Guarantee is intended for securing the performance of the entire tenure of the agreement between IIMK and the Contractor. The Performance Guarantee/Security Deposit shall be released only on satisfactory performance of the terms of agreement between the vendor and IIMK for the entire period of the agreed time frame plus two months. The deposit will not bear any interest.

The Performance Guarantee/Security Deposit is liable to be forfeited, if the party fails to execute the work as per the terms and conditions of the agreement and to the satisfaction of IIMK or on account of any breach of the agreement.

Within four weeks from the date of acceptance of the order by the selected Bidder, the Bidder shall execute an Agreement on non-judicial stamp paper of appropriate value (Rs200/-) with IIMK at Kozhikode in a format to be mutually agreed between IIMK and the selected Bidder.

2. Instructions to The Bidders

2.1 Technical bid and Price bid will be submitted concurrently, duly digitally signed in the website portal https://mhrd.euniwizarde.com. The RFP document may be downloaded from website & submission of technical bid / Price bid as per RFP time schedule.

2.2 Price Bids should conform to the RFP's price bid (BOQ) format only, any deviation is not allowed.

2.3 Bids are to be submitted online through the website stated above. All the documents uploaded by the Tender Inviting Authority form an integral part of contract. Bidders are required to upload all the RFP documents along with other documents, as asked for in the RFP, through the above website within stipulated date and time as given in the RFP Notice.

2.4 The Bidder shall carefully go through the documents and prepare the required documents, and upload the scanned documents in Portable Document Format (PDF) to the portal in the designated location of Technical Bid. The bidder needs to fill up the rates, downloaded for the Price Bid (In Excel format) in the designated cell and upload the same in designated location of BOQ.

2.5 For complete details, refer E-Procurement website https://mhrd.euniwizarde.com.

2.6 IIMK may issue amendment / errata to the RFP documents before due date of submission of Bids. The Bidders are required to read the RFP documents in conjunction with amendments, if any, issued by IIMK. The Bidder is not supposed to incorporate any amendment / errata in the body of RFP documents either in ink or pencil. In case the Bidder on the body of RFP incorporates amendments/errata issued, they shall not be considered and the amendment / errata issued by the IIMK shall only hold good. The amendments/errata issued to these documents if any would be uploaded on web site RFP document can be downloaded from IIMK website www.iimk.ac.in & https://mhrd.euniwizarde.com. The bidders shall visit these sites from time to time to see these amendments/errata.

2.7 The bidders are required to upload the completed documents only after satisfying each and every condition laid down in the RFP documents.

2.8 IIMK reserves the right to postpone and / or extend the date of receipt of opening of Bids or to withdraw the RFP notice, without assigning any reason thereof. In such cases, the bidders shall not be entitled to any form of compensation from IIMK.

2.9 Transfer of RFP document purchased by one Bidder to another is not permissible. Similarly, transfer of BID submitted by one Bidder to another is also not permissible. No Alteration in the essence of BID, once submitted shall be permissible. In case the Bidder transfers the BID or modifies/withdraws during the period of validity in violation of the Bid Security Agreement, the Institute will take necessary steps as per the terms of the Bid Security Agreement.

3. Digital Signatures and Enrollment

3.1 Bidder should do Online Enrolment in the Portal using the option Click Here to Enroll available in the Home Page. Then the Digital Signature enrollment has to be done with the

e-token, after logging into the portal.

3.2 Bidder then logs into the portal giving user id / password chosen during enrollment.

3.3 The e-token that is registered should be used by the bidder and should not be misused by others.

3.4 DSC once mapped to an account cannot be remapped to any other account. It can only be deactivated.

3.5 The Digital Signature Certificate (DSC) used for signing the bids on the E-Procurement Portal should belong to the authorized signatory or the person holding a GPA to sign the bids.

3.6 The documents uploaded must be virus scanned and digitally signed using the Digital Signature Certificate (DSC) by the authorized signatory.

3.7 For submission of e-tender, bidders are requested to get themselves registered with https://mhrd.euniwizarde.com website along with class-II/III Digital Signature Certificate (DSC)issued by authorized issuing authority under IT Act 2000.

3.8 Any queries relating to the process of online bid submission or queries relating to e-Wizard Portal, in general, may be directed to the e-Wizard Helpdesk. The contact number for the helpdesk is Gagan (8448288987/eprochelpdesk.01@gmail.com), Vijay (8448288989/eprochelpdesk.03@gmail.com),Suriya(8448288994/eprochelpdesk.06@gmail.com),8448288992,8448288984,8448288986,8448288982,84482889.

4. **Instructions on E-Submission**

   4.1 The Bidders can update well in advance, the documents such as certificates, purchase order details etc., under My Documents option and these can be selected as per RFP requirements and then attached along with bid documents during bid submission. This will ensure lesser upload of bid documents.

   4.2 After downloading / getting the RFP schedules, the Bidder should go through them carefully and then submit the documents as per the RFP document; otherwise, the bid will be rejected.

   4.3 The BOQ template must not be modified /replaced by the bidder and the same should be uploaded after filling the relevant columns, else the bidder is liable to be rejected for that RFP.   Bidders are allowed to enter the Bidder Name and Values only.

   4.4 If there are any clarifications, this may be obtained online through the e-Procurement Portal, or through the contact details given in the bid document. Bidder should take into account of the corrigendum published on the https://mhrd.euniwizarde.com and www.iimk.ac.in before submitting the bids online. Bidder, in advance, should prepare the bid documents to be submitted as indicated in the RFP schedule and they should be in PDF formats.

   4.5 There is no fee for participating in this RFP. The RFP form can be freely downloaded from the institute Website: http://www.iimk.ac.in/announcements/Tender.php & from our E-Procurement website: https://mhrd.euniwizarde.com.

4.6   The bidder should read the terms and conditions and accepts the same to proceed further to submit the bids.

4.7   The bidder has to submit the RFP document(s) online well in advance before the prescribed time to avoid any delay or problem during the bid submission process.

4.8   There is no limit on the size of the file uploaded at the server end. However, the upload is decided on the Memory available at the Client System as well as the Network bandwidth available at the client side at that point of time. In order to reduce the file size, bidders are suggested to scan the documents in 75-100 DPI so that the clarity is maintained and the size of file gets reduced. This will help in quick uploading even at very low bandwidth speeds.

4.9   It is important to note that, the bidder has to click on the Freeze Bid Button, to ensure that, he/she completes the Bid Submission Process. Bids, which are not frozen, are considered as Incomplete/Invalid bids and are not considered for evaluation purposes.

4.10   The Tender Inviting Authority (TIA) will not be held responsible for any sort of delay or the difficulties faced during the submission of bids online by the bidders due to local issues.

4.11   The bidder may submit the bid documents online mode only, through this portal. Offline documents will not be handled through this system.

4.12   At the time of freezing the bid, the e-Procurement system will give a successful bid updating message after uploading all the bid documents submitted and then a bid summary will be shown with the bid no., date & time of submission of the bid with all other relevant details. The documents submitted by the bidders will be digitally signed using the e-token of the bidder and then submitted.

4.13   After the bid submission, the bid summary has to be printed and kept as an acknowledgement as a token of the submission of the bid. The bid summary will act as a proof of bid submission for a RFP floated and will also act as an entry point to participate in the bid opening event.

4.14   Successful bid submission from the system means, the bids as uploaded by the bidder is received and stored in the system. System does not certify for its correctness.

4.15   The bidder should see that the bid documents submitted should be free from virus and if the documents cannot not be opened, due to virus, during Bid opening, the bid is liable to be rejected.

4.16   The time that is displayed from the server clock at the top of the tender Portal, will be valid for all actions of requesting bid submission, bid opening etc., in the e-Procurement portal. The Time followed in this portal is as per Indian Standard Time (IST) which is GMT+5:30. The bidders should adhere to this time during bid submission.

4.17   The bidders are requested to submit the bids through online e-Procurement system to the Tender Inviting Authority (TIA) well before the bid submission end date and time (as per Server System Clock)

4.18 The bidder/Bidder/contractor shall file the applicable returns with Tax departments in time and submit the same as documentary proof.

4.19 The GST applicable shall be shown as separate line items in the Tax invoices to avail in put credit to IIMK.

4.20 Every Tenderer/Bidder shall furnish along with the bid the latest Income Tax Clearance Certificate without which his/her bid is liable to be rejected. The Institute will deduct amount towards Tax Deducted at Source (TDS) as per the latest Income Tax Rules from all payments made to the supplier/contractor.

5. Preparation and Signing of Bids

5.1 The Technical Bid shall be sent in a sealed envelope containing the documents and details as given below and super scribed with words "Implementation and Support of Enterprise Resource Planning (ERP) Solution at Indian Institute of Management Kozhikode (IIMK)", and the Name and address of the Bidder shall be given for communication. ***Price Bid (BOQ) shall be accepted only in online mode though E-Procurement Portal, hence the hard copy of the BOQ need not be sent.***

5.2 The hard copy of the Technical Bid shall contain: -

(a) The documents to support fulfillment of Qualifying Criteria, Documentary evidence to demonstrate the capability of the Tenderer to provide the services as mentioned in the scope of work. Among other things, it shall contain duly filled in Forms and supporting minimum qualification criteria as per RFP [●]

(b) It shall also contain the Technical Bid of the Tender document published by IIMK with each page signed for acceptance of the terms and conditions and Technical Specification filling the details wherever required;

(c) Bidder's compliance to the Technical Specifications specified in the tender shall be included in this cover.

(d) Preliminary Technical/functional support plan indicating the program of work and resource planning chart for the works indicated in the RFP. Documents for evaluating the RFP based on Technical evaluation parameters as per the RFP [●] in proper order. Additional Sheets shall be attached to the forms, if necessary.

(e) Any required information such as reference materials, manuals and other documents included in the RFP should be clearly labelled or otherwise identified and referenced in a clear and consistent manner throughout the RFP.

6. Conditions for the Issue of RFP

6.1 The Bidding Process shall be governed by, and construed in accordance with, the laws of India and the Courts in the State of Kerala shall have exclusive jurisdiction over all disputes arising under, pursuant to and/or in connection with the Selection Process.

6.2 IIMK can choose not to proceed with any bidder with respect to one or more categories of services/requirements outlined in this RFP; and can choose to suspend the RFP at any

time without assigning any reason or to issue a new RFP for this project that would replace this RFP.

6.3   IIMK, in its sole discretion and without incurring any obligation or liability, reserves the right, at any time without assigning any reason, to:

   a)   suspend and/or cancel the Selection Process and/or amend and/or supplement the Selection Process or modify the dates or other terms and conditions relating thereto;

   b)   Consult with any bidder in order to receive clarification or further information;

   c)   Retain any information and/or evidence submitted to IIMK by, on behalf of and/or in relation to any bidder; and/or

   d)   Independently verify, disqualify, reject and/or accept any and all submissions or other information and/or evidence submitted by or on behalf of any bidder.

6.4   All documents and other information supplied by IIMK or submitted by a Bidder shall remain or become, as the case may be, the property of IIMK. IIMK will not return any submissions made here under. Bidders are required to treat all such documents and information as strictly confidential.

6.5   IIMK reserves the right to make inquiries with any of the clients/customers listed by the bidders in their previous experience record.

6.6   This RFP does not commit IIMK to award a contract or to engage in negotiations. Further, no bidder is entitled for any claims for cost incurred in making the proposal cost may be incurred in anticipation of award of contract.

6.7   Timing and sequence of events resulting from this RFP shall ultimately be determined by IIMK.

6.8   Neither the bidder nor any of bidder's representatives shall have any claims whatsoever against IIMK or any of their respective officials, agents, or employees arising out of or relating to this RFP or these procedures (other than those arising under a definitive service agreement with the bidder in accordance with the terms thereof).

6.9   The Rights of IIMK to terminate the Process;

   a)   IIMK may terminate the RFP process at any time without assigning any reason. IIMK makes no commitments, explicit or implicit, that this process will result in a business transaction with anyone.

   b)   This RFP does not constitute an offer by IIMK. The bidder's participation in this process may result in IIMK selecting the bidder to engage in further discussions and negotiations toward execution of a contract. The commencement of such negotiations does not, however, signify a commitment by IIMK to execute a contract or to continue negotiations. IIMK may terminate negotiations at any time without assigning any reason.

   c)   IIMK reserves the right to accept or reject any proposal, and to annul the bidding process and reject all proposals at any time prior to award of contract, without

thereby incurring any liability to the affected bidder or bidders or any obligation to inform the affected bidder or bidders of the grounds for actions taken by IIMK.

6.10 It is not obligatory on the part of the Board of Governors, IIMK to accept the lowest bid. They reserve the right to accept a bid in full or in part and /or reject any or all bids(s) without assigning any reason or without any liability. No representation whatsoever will be entertained on this account.

6.11 Acceptance of part / whole bid / modification – Rights thereof: IIMK reserves the right to modify the technical specifications / quantities / requirements / tenure mentioned in this RFP including addition / deletion of any of the item or part thereof after pre-bid and the right to accept or reject wholly or partly bid offer, or, without assigning any reason whatsoever. No correspondence in this regard shall be entertained. IIMK also reserves the unconditional right to place order on wholly or partly bid quantity to successful bidder.

6.12 This RFP is not an offer and is issued with no commitment.   RFP is just an invitation to receive proposals only from short listed bidders in respect of the Project. IIMK reserves the right to withdraw the RFP and change or vary any part thereof at any stage. IIMK also reserves the right to disqualify any bidder, should it be so necessary at any stage for any reason whatsoever.

6.13 Neither the bidder nor any of the bidder's representatives shall have any claims whatsoever against IIMK or any of their respective officials, agents, or employees arising out of, or relating to this RFP or these procedures (other than those arising under a definitive service agreement with the bidder in accordance with the terms thereof).

6.14 The cost of the proposal and bidding process - The bidder is responsible for all costs incurred in connection with participation in the bidding process, including, but not limited to, costs incurred in participation in meetings/discussions/presentations, preparation of proposal, in providing any additional information required by IIMK to facilitate the evaluation process, and in finalizing an Agreement or a contract or all such activities related to the bid process.

6.15 No oral communication by either party will be recognized as official communication or a commitment. The only permitted mode of communication by either party will be through email id of the respective authorized persons and only those communications will be considered as official communications

6.16 No oral conversations or agreements with any official, agent, or employee of IIMK shall affect or modify any terms of this RFP, and any alleged oral agreement or arrangement made by a bidder with any department, agency, official or employee, consultant/advisor of IIMK shall be superseded by the definitive agreement that results from this RFP process. Oral communications by IIMK to bidders shall not be considered binding on IIMK, nor shall any written materials provided by any person other than the authorized/designated representative of IIMK for this bidding process.

6.17 All bidders, until the contract is awarded and the successful bidder during the term of the Agreement and for a period of one year thereafter, shall not, directly or indirectly, solicit any employee of IIMK to leave IIMK or any other officials/advisors/consultants involved in this RFP process in order to accept employment with the organization, or any

person acting in concert with the bidder, without prior written approval of IIMK.

6.18 The rights to participate in the bidding process or the eligibility to bid and the RFP are not transferable.

7. Acknowledgement of Understanding of the Terms

7.1 By submitting a proposal, each bidder shall be deemed to acknowledge that it has carefully read all sections of this RFP, including all forms, schedules and annexure hereto, and has fully informed itself as to all existing conditions and limitations.

7.2 By submitting a proposal, the bidder shall be deemed to acknowledge that the bidder has carefully read all sections of this RFP, including all forms, schedules and Appendices hereto, and has fully informed itself as to all the conditions and limitations.

7.3 By submitting a proposal in response to this RFP, the bidder shall be deemed to acknowledge that the company is in agreement with the terms and conditions of the RFP and the procedures adopted for bidding & evaluation of the responses of the bidders.

7.4 It shall be deemed that by submitting the Proposal, the bidder has:

a) Made a complete and careful examination of the RFP;

b) Received all relevant information requested from IIMK.

c) Accepted the risk of inadequacy, error or mistake in the information provided in the RFP or furnished by or on behalf of IIMK or relating to any of the matters referred to in the RFP;

d) Satisfied itself about all matters, things and information, necessary and required for submitting an informed Proposal/bid and performance of all of its obligations there under;

e) Acknowledged that it does not have a Conflict of Interest; and

f) Agreed to be bound by the undertaking provided by it under and in terms thereof.

7.5 It shall be deemed that by submitting the Proposal, the bidder agrees and releases IIMK, its employees, agents and advisers, irrevocably, unconditionally, fully and finally from any and all liability for claims, losses, damages, costs, expenses or liabilities in anyway related to or arising from the exercise of any rights and/or performance of any obligations hereunder, pursuant hereto and/or in connection herewith and waives any and all rights and/or claims it may have in this respect, whether actual or contingent, whether present or future.

7.6 IIMK shall not be liable for any omission, mistake or error in respect of any of the above or on account of any matter or thing arising out of or concerning or relating to RFP or the Selection Process, including any error or mistake therein or in any information or data given by IIMK.

7.7 The bidder is requested to sign the proposal covering letter as per the Format in the **Form No-1 (PROPOSAL COVERING LETTER)** to declare the understanding of the terms

and acceptance of the conditions.

7.8   All Bidders who submit a bid in response to this RFP shall understand, acknowledge and agree that IIMK is not obligated thereby to enter into an agreement or contract with any Bidder and, further, has absolutely no financial obligation to any Bidder.

7.9   A Bid submitted in response to this RFP shall be considered a binding offer. Acknowledgement of this condition shall be indicated by signature of an officer of the Bidder legally authorized to execute contractual obligations and shall be conveyed by submitting a signed Form of RFP as per the enclosed format.

8. Corrigendum / Amendment to the RFP

8.1   If IIMK deems it appropriate to revise any part of this RFP or to issue additional data to clarify an interpretation of the provisions of this RFP, it may issue supplements to this RFP. Such supplemental information, including but not limited to, any additional conditions, clarifications, minutes of meeting, and official communication over email/post will be communicated to all the bidders by e-mail/website. Any such supplement shall be deemed to be incorporated by this reference into this RFP.

8.2   Amendments if any shall be part of the RFP documents and will be notified in IIMK website. The same will be binding on bidders. The Chief Administrative Officer, IIMK may, at his discretion, extend the deadline for the submission of the Bids. Bidders are advised to view the IIMK Website/e-tendering portal regularly to ensure that the Bidder has not missed any amendment issued by IIMK.

8.3   At any time prior to the deadline (or as extended by IIMK) for submission of bids, IIMK, for any reason, whether at its own initiative or in response to clarifications requested by prospective bidder, may modify the RFP document by issuing amendment(s). All bidders who have received the RFP document will be notified of such amendment(s) by email/website and these will be binding on all the bidders.

8.4   In order to allow bidders a reasonable time to take the amendment(s) into account in preparing their bids, IIMK, at its discretion, may extend the deadline for the submission of bids.

9. Bidder Queries

9.1 Prospective Bidders requiring further information or clarification of the RFP documents may do so through the e-procurement portal https://mhrd.euniwizarde.com/ at least three day before the Pre-Bid meeting. All Clarifications furnished by IIMK will also be notified through the e-procurement portal.

9.2 IIMK will not take the responsibility to acknowledge the receipt of the queries by email. In no event will IIMK be responsible for ensuring that bidders' queries have been received by IIMK.

9.3 Telephone calls or in person interviews/discussions will not be accepted / entertained.

9.4 IIMK will endeavor to provide a complete, accurate, and timely response to all queries submitted by the bidders. However, IIMK makes no representation or warranty as to the

completeness or accuracy of any response, nor does IIMK undertake to answer all the queries that would be submitted by the bidders.

9.5 IIMK will share the answers/responses to the queries with all the bidders either at the Pre bid meeting or through the e-procurement portal. All responses given by IIMK will be intimated to all the bidders.

10. Conditions on the Content of the Bids

10.1 Number of Proposals: No bidder shall submit more than one proposal or bid against this RFP.

10.2 Alternate Bids: The Bidder shall note that no alternative RFP conditions or alternative proposal for whole or part of the work will be acceptable.

10.3 Language of bids: The Proposal with all accompanying documents (the "Documents") and all communications in relation to or concerning the bidding Process shall be in English language. No supporting document or printed literature shall be submitted with the Proposal unless specifically asked for and in case any of these Documents is in any other language other than English, it must be accompanied by an accurate translation of all the relevant passages in English, in which case, for all purposes of interpretation of the Proposal, the translation in English shall prevail.

10.4 The forms of RFP, schedules, conditions of contract, etc., shall not be defaced or detached from the RFP documents. No alteration shall be made in any of the RFP documents and the Bidder shall comply strictly with the terms and conditions contained in the RFP document.

10.5 Rights to the Content of the Proposal: All the bids and accompanying documentation submitted as bids against this RFP will become the property of IIMK and will not be returned after opening of the technical proposals. IIMK is not restricted in its rights to use or disclose any or all of the information contained in the proposal and can do so without compensation to the bidders. IIMK shall not be bound by any language in the proposal indicating the confidentiality of the proposal or any other restriction on its use or disclosure.

10.6 All proposals and accompanying documentation submitted as the bids against this RFP, once opened will become the property of IIMK and will not be returned.

10.7 The information provided by the bidder, like the names of the customers of the bidder or any proprietary information about the bidder etc. will be treated as confidential information, unless asked to disclose by the orders of the court of law or the Information Commission (under the RTI Act).

10.8 IIMK is not restricted in its rights to use or disclose any or all of the information contained in the proposal, and can do so without compensation to the bidder. IIMK shall not be bound by any language in the proposal indicating the confidentiality of the proposal or any other restriction on its use or disclosure.

10.9 IIMK has the right to use the services of external experts to evaluate the proposal by the bidders and share the content of the proposal either partially or completely with the experts for evaluation with adequate protection of the confidentiality information of the bidder.

10.10 The letters seeking clarifications sent either to all the bidders or to specific bidder as the case may be during the evaluation of technical and commercial proposal and the minutes of the meeting recorded during the technical and commercial evaluation shall also be   deemed to be incorporated by this reference in this RFP.

10.11 Entire Request for Proposal - The following constitute the entire Request for Proposal issued by IIMK: -

a)   The RFP documents supplied by the IIMK

b)   The additional conditions if any, supplied by the IIMK on or before the last date for the submission of the responses by the bidder

c)   The clarifications provided by IIMK during the pre-bid phase or before the last date for the submission of the responses by the bidder.

d)   Minutes of the meeting of pre-bid meeting circulated to the bidders by the IIMK

e)   Any official communication through email/fax/post by IIMK sent to all the bidders during the bidding period or before the last date for submission of the response by the bidder.

10.12 Entire proposal by the bidder – the following constitute the entire proposal by the bidder: -

a)   The response by the bidder submitted in the soft copy format in the e-tendering System.

b)   The presentation material submitted by the bidder during the bidder presentation sessions and the minutes of the meeting thereof.

c)   The clarifications provided by the bidder as a part of the proposal against any queries/requests by IIMK.

d)   Minutes of the meeting of the pre-bid meeting

10.13 **The Communications: -**

a)   The communications if any exchanged between IIMK and the bidders related tothe RFP and the bidding process, through emails/fax/post will be part of the RFP/ proposal documents.

b)   Only communications sent through email ids of the authorized persons of the bidders or IIMK and letters signed by the authorized persons will be part of the official records for the RFPs and the proposals

10.14 All communications concerning this RFP must be directed only to the Chief

Administrative Officer, IIMK. Any oral communications will beconsidered unofficial and non-binding. Bidders should rely only on written statements or mails issued by the Chief Administrative Officer, IIMK.

11. Right of Verification

11.1 IIMK reserves the right to verify all statements, information and documents, submitted by the bidder in response to the RFP. Any such verification or the lack of such verification by IIMK to undertake such verification shall not relieve the bidder of its obligations or liabilities hereunder nor will it affect any rights of IIMK there under.

11.2 In case it is found during the evaluation or at any time before signing of the Agreement or after its execution and during the period of subsistence thereof, that one or more of the eligibility conditions have not been met by the bidder or the bidder has made material misrepresentation or has given any materially incorrect or false information, the bidder shall be disqualified forthwith if not yet appointed as the IA either by issue of the LOA or entering into of the Agreement, and if the Selected bidder has already been issued the LOA or has entered into the Agreement, as the case may be, the same shall, notwithstanding anything to the contrary contained therein or in this RFP, be liable to be terminated, by a communication in writing by IIMK without IIMK being liable in any manner whatsoever to the Selected bidder. In such an event, IIMK shall also take necessary action as indicated in the Bid Security agreement signed by the bidder.

11.3 Authenticity of the information

a) If the information submitted by the bidder during the RFP process is found to be mis-represented, incorrect or false, accidentally, unwittingly or otherwise, at any time during the bidding process or any time during the tenure of the contract, including the extension period if any, IIMK has the right to terminate the contract and initiate penal action against the bidder.

b) In case of such termination and penal actions, IIMK shall reserve the right to seek penalty to cover the cost of damages including the cost of implementation and opportunity loss due to time spent on implementation.

11.4 A proposal may be construed as a non-conforming proposal and ineligible for consideration - If it does not comply with the requirements of this RFP. Failure to comply with the technical requirements, and failure to acknowledge the receipt of amendments, are common causes for holding proposals non-conforming

11.5 Non-Conforming Proposals - Any proposal may be construed as a non-conforming proposal and ineligible for consideration if it does not comply with the requirements of this RFP. Without limiting generality of the foregoing, the failure to comply with the technical requirements, and acknowledgment of receipt of amendments, will be causes for holding proposals non-conforming. In addition, IIMK will not consider for evaluation proposals that are "canned" presentations of promotional materials and that do not follow the format requested in this RFP or do not appear to address the specific requirements of IIMK as described in different sections of this RFP.

12. Disqualification of Bids

12.1 The proposal submitted by the bidder is liable to be disqualified under the following cases. Each of the conditions laid down here are equally important, as indicated by the consequence of the violation of the condition, which is disqualification of the entire proposal of the bidder.

   a) Proposal submitted without **Bid Security Declaration Form**;

   b) Proposal not submitted in accordance with the procedure and formats prescribed in this document or treated as non-conforming proposal;

   c) During validity of the proposal, or its extended period, if any, the bidder increases his quoted prices;

   d) The bidder qualifies the proposal with its own conditions or assumptions; and conditions which contradicts the terms and conditions of the RFP or the contract document circulated with the RFP

   e) Proposal is received in incomplete form;

   f) Proposal is received after due date and time;

   g) Proposal is not accompanied by all the requisite documents;

   h) A Price Bid submitted with assumptions or conditions: If the bidder provides any assumptions in the commercial proposal or qualifies the commercial proposal with its own conditions, such proposals will be rejected even when the commercial value of such proposals is the lowest or the best value.

   i) If bidder provides quotation only for a part of the project;

      ➢ Information submitted in technical proposal is found to be misrepresented, incorrect or false, accidentally, unwittingly or otherwise, at any time during the processing of the contract (no matter at what stage) or during the tenure of the contract including the extension period of the contract if any;

   j) If the price-bid (BOQ) of the bidder found to be abnormally high or low, then the decision of the management on rejection of the Bid is final.

   k) Bidder tries to influence the proposal evaluation process by unlawful/corrupt/fraudulent means at any point of time during the bid process;

   l) In case any one bidder submits multiple proposals or if common interests are found in two or more bidders, the bidders are likely to be disqualified;

   m) While evaluating the proposals, if it comes to IIMK knowledge expressly or implied, that some bidders may have colluded in any manner whatsoever or otherwise joined to form an alliance resulting in delaying the processing of proposal then the bidders so involved are liable to be disqualified for this contract as well as for a further period of three years from participation in any of the bids floated by IIMK.

   n) Bidder fails to deposit the Performance Bank Guarantee (PBG) or fails to enter into a contract within 30 working days of the date of notice of award or within such extended period, as may be specified by IIMK.

   o) Commercial Proposal is submitted along with the Technical proposal. The price

information, the pricing policy or pricing mechanisms or any document/information/file indicative of the commercial aspects of the proposal are either fully or partially enclosed or are part of the Technical Proposal

p) Bidders or any person acting on its behalf indulges in corrupt and fraudulent practices;

q) Inability to respond in accordance with the bidding guidelines

    i. The successful bidder, invited to sign the contract qualifies the letter of acceptanceof the contract with its conditions

    ii. Bidder fails to deposit the Performance Bank Guarantee or fails to enter into a contract within period indicated in the notice of award of contract or within such extended period, as may be specified by IIMK.

r) Consequences of disqualification

    i. If a bid or a proposal is disqualified, the bidder will not be eligible to participate in the bidding process initiated by this RFP.

    ii. If the proposal/bid is disqualified, it will not be processed further. No further correspondence from the bidder with the IIMK will be entertained.

    iii. If the disqualification is for the reasons of fraudulent or corrupt practice, IIMK has the right to initiate actions to black list the bidder as per the provisions of therelevant acts/rules.

13. Validity

13.1 All prices and any other significant factors contained in the bid shall be valid for acceptance for a period of 180 calendar days from the date of opening of bids.

13.2 Notwithstanding the above, it is obligatory for the Bidder to keep the validity for another 60 days for which request in writing by the Chief Administrative Officer, IIMK before the expiry of the original validity period would be sufficient intimation and shall be acknowledged by the   Bidder.

14. Right to Modify

14.1 IIMK reserves the right to modify any terms, conditions and specifications of the RFP document and to obtain revised price bids from the Bidders with regard to changes in RFP document clauses.

15. Confidentiality

15.1 All recipients of the RFP documents for the purpose of submitting a Bid shall treat the contents of the document as private and confidential. The "Instructions to the Bidders" shall form part of the Contract. The Successful bidder shall execute Non-Disclosure Agreement.

16. Prohibited Practices

16.1 The bidders and their respective officers, employees, agents and advisers shall observe the highest standard of ethics during the Selection Process. Notwithstanding anything to the contrary contained in this RFP, IIMK shall reject a Proposal without being liable in any manner whatsoever to the bidder, if it determines that the bidder has, directly or indirectly or through an agent, engaged in corrupt practice, fraudulent practice, coercive practice, undesirable practice or restrictive practice (collectively the "Prohibited Practices") in the Selection Process. In such an event, IIMK shall, without prejudice to its any other rights or remedies, forfeit and appropriate the Performance Security, if available, as mutually agreed genuine pre-estimated compensation and damages payable to IIMK for, inter alia, time, cost and effort of IIMK, in regard to the RFP, including consideration and evaluation of such bidder's Proposal.

16.2 Without prejudice to the rights of IIMK under the above Clause hereinabove and the rights and remedies which IIMK may have under the LOA or the Agreement, if an bidder, as the case may be, is found by IIMK to have directly or indirectly or through an agent, engaged or indulged in any corrupt practice, fraudulent practice, coercive practice, undesirable practice or restrictive practice during the Selection Process, or after the issue of the LOA or the execution of the Agreement, such bidder shall not be eligible to participate in any bids or RFP issued by IIMK during a period of 2 (two) years from the date such bidder, as the case may be, is found by IIMK to have directly or through an agent, engaged or indulged in any corrupt practice, fraudulent practice, coercive practice, undesirable practice or restrictive practice, as the case may be. For the purposes of this condition on prohibited practices, the following terms shall have the meaning hereinafter respectively assigned to them as follows:

   a) "corrupt practice" means (i) the offering, giving, receiving, or soliciting, directly or indirectly, of anything of value to influence the action of any person connected with the Selection Process (for avoidance of doubt, offering of employment to or employing or engaging in any manner whatsoever, directly or indirectly, any official of IIMK who is or has been associated in any manner, directly or indirectly with the Selection Process or the LOA or has dealt with matters concerning the Agreement or arising there from, before or after the execution thereof, at any time prior to the expiry of one year from the date such official resigns or retires from or otherwise ceases to be in the service of IIMK, shall be deemed to constitute influencing the actions of a person connected with the Selection Process; or (ii) save as provided herein, engaging in any manner whatsoever, whether during the Selection Process or after the issue of the LOA or after the execution of the Agreement, as the case may be, any person in respect of any matter relating to the Project or the LOA or the Agreement, who at any time has been or is a legal, financial or technical consultant/ adviser of IIMK in relation to any matter concerning the Project

   b) "fraudulent" practice means a misrepresentation of facts in order to influence a procurement process or the execution of a contract to the detriment of IIMK, and includes collusive practices among Bidders (prior to or after bid submission) designed to establish bid prices at artificial, non-competitive levels and to deprive the purchaser of the benefits of free and open competition;

       i.   "coercive practice" means impairing or harming or threatening to impair or harm, directly or indirectly, any persons or property to influence any

person's participation or action in the Selection Process;

ii.   "undesirable practice" means (i) establishing contact with any person connected with or employed or engaged by IIMK with the objective of canvassing, lobbying or in any manner influencing or attempting to influence the Selection Process; or (ii) having a Conflict of Interest; and

iii. "Restrictive practice" means forming a cartel or arriving at any understanding or arrangement among bidders with the objective of restricting or manipulating a full and fair competition in the Selection Process.

17.   Non- Blacklisting

17.1 As on date of submission of the proposals, the bidder, OEM and other Sub Contractor partners should not have been black-listed by Government of India /State Government/ Public Sector Units at the time of bid submission.

17.2 Bidder shall furnish an affirmative statement on not being black listed by Government of India/State Governments/ Public Sector Enterprises under the Central Government for unsatisfactory past performance, corrupt, fraudulent or any other unethical business practices.

18.   Conflict Of Interest

18.1 A bidder shall not have a conflict of interest that may affect the selection process or the Project. Any bidder found to have a Conflict of Interest shall be disqualified.

18.2 Bidder shall furnish an affirmative statement as to the absence of, actual or potential conflict of interest on the part of the Bidder or any prospective subcontractor due to prior, current, or proposed contracts, engagements, or affiliations with IIMK. Additionally, such disclosure shall address any and all potential elements (time frame for service delivery, resource, financial or other) that would adversely impact the ability of the Bidder to complete the requirements as given in the RFP. Undertaking on Conflict of Interest for making declaration to this effect has been given in **Form No-2** of this document.

19.   Agreement & Performance Security Deposit

19.1 The successful bidder shall enter into and execute the Contract Agreement, to be prepared and completed at the cost of the Contractor, in the form annexed to these Conditions with such modification as may be necessary within 10 days from the date of issuance of the Work order whichever is earlier. The Contractor shall prepare the agreement on stamp paper in 1 (ONE) original. The duly signed original will be with the Employer and the selected Bidder receiving the photocopy. The contract shall be valid till all contractual obligations are fulfilled.

Within ten days of the award of Contract, the Vendor (i.e. successful Bidder) shall furnish a Bank Guarantee/Demand Draft/FDR from a Nationalized / Scheduled Bank for a sum

equivalent to 3% of the order value as Security Deposit (Performance Guarantee) valid for the Delivery/ Completion period plus two months. The Security Deposit shall not bear any interest.

20. Technical Response Guidelines

Bidder's technical bid constitute the basis for evaluation of IIMK ERP Implementation. Bidders are required to submit the responses covering their company profile, proposed solution overview, functional & non-functional capabilities, client references & case studies, previous implementation experiences along with tools used for data migration and expected benefits to IIMK from implementing their solution.

Bidders are required to submit the technical bid as per the following format so that IIMK can evaluate responses uniformly.

Part 1 – Executive Summary

This section should summarize the key aspects of bidder response in no more than ten pages. The cover letter/executive summary should include:

- SI's understanding of ERP products and services
- SI must provide a clearly articulated summary of SI ERP Implementation strategy in areas relevant to IIMK and this proposal. This should include, but not be limited to significant functional enhancements or additions, ERP customization guidelines, integration services, project methodology, change management strategy and any industry offerings relevant to the education sector.
- A summary of what the bidder believes to be a compelling business case for IIMK.
- Any issues or concerns / risks that the bidder envisions being associated with fulfilling the requirements of the RFP for ERP; cite specific suggestions for avoiding or mitigating these risks.
- SI should provide information about their resources, customer base and revenue growth.
- SI should provide information to represent R&D spending and roadmap in the different functional areas of the product offered

Part 2 – Solution Summary

- This section should describe the Solution Architecture proposed for IIMK. This should detail functional areas like Finance and Accounts, Purchasing and Stores, Payroll, Human Capital Management, Campus/Academics and other processes administration capabilities.
- This section should also cover the technical functionalities like OS, database, in Memory features, Analytics, reporting, mobile development tools, portal, ESS,

MSS and work flow development tools relevant to IIMK requirements.

- The Solution Architecture should contain the details of the ERP System Integrated Services and solution components proposed along with the other 3rd party solution components required to meet the requirements of IIMK's requirement. The tools / solutions required for running the maintenance and support operations, the solutions / tools required during implementation, support and maintenance phases also are to be mentioned.
- Solution details including but not limited to the ERP solution. They should have the following details :
  a) Modules or solution components of the ERP
  b) Functional coverage of the solution
  c) Technical coverage of solution
  d) Inbuilt support systems like Document Management Systems - DMS
  e) The details of third party solutions if any, its description and purpose.

Part 3 - Functional Requirement Fitment

Bidders are required to complete the response referring to the functional capability **matrix for all the functional areas – Annexure-I: IIMK's Functional Requirements Specification**. The following table should be used as guidance in providing responses to thefunctional requirements fitment solution

Fitment code	FRS Fitment Score	Functional Requirements Fitment SolutionResponse Definition
CO	Direct Fit through Standard ERP Solution	This requirement out-of-the-box or with configuration capabilities provided within thesoftware
CU	Customization of ERP Solution	This requirement is met via customization(if this is the case mention development complexity)
AD	Fitment through New Application Development	This requires a New Application developmentby the bidder
BA	Fitment through Third Party Offering to ERP Solution	This requirement is met with a third-party solution (if this is the case, please provide the name of the third-party product in the Remarkscolumn). Please ensure that the product detailsand cost for the third-party product are included in bidder commercial response.

COF	Fitment through Planned Future Releases of ERP Software	This requirement will be met in the future release of ERP software within 1 year (if this isthe case, please provide the version and timingof the release in the Remarks column)
NC	Cannot be met	This requirement cannot be met

Table 14: Functional Requirement Fitment

The bidder should provide functional requirement details as per the format provided in the Annexure I FRS documents. The FRS compliances summery sheet as given in Annexure VIII to be filled and signed by bidder.

Part 4 – Prequalification criteria

Vendor to meet all the Pre-qualification criteria mentioned in the tender document. They also has to submit compliance and supporting documents as mentioned in PQC.

Part 5 – Technical RequirementFitment

Bidders are required to complete this portion of the response referring to all the Technical
Requirements as mentioned in Annexure II

Part 6 – Non Functional Requirement Fitment

Bidders are required to complete this portion of the response referring to all the non-functional
Requirements.

Part 7 – Adoption of Best Practices

The bidder is expected to provide an understanding of the best practices related to implementation in universities / education / Management institutes from their previous experience in ERP solution implementation. The best practices applicable for public sector / government organizations and educational / Management institution need to be highlighted which can be adopted at IIMK.

Part 8 – Project Methodology

The Technical proposal should contain a detailed description of how the bidder will implement the ERP solution at IIMK. It should articulate, in detail, as to how the bidder's methodology, technical teams, the management expertise and specific capabilities required for the project will be deployed to meet the requirements of IIMK as specified in this RFP. This should include:

- Overall Implementation Methodology
- Risk Management
- The mechanisms to ensure all the processes of IIMK described in
  the FRS of thisRFP are implemented without any change in

scope
- Testing and quality control methods
- Methodology and Expertise in Business Design and Process Design to be provided aselaborated in scope of work of this RFP
- Methodology for Training and Change Management

Part 9 – Project Governance, Project Plan, and Resource Loading

The bidder should give an overview of the project plan, resource loading, the mechanisms for managing the timelines, the mechanism for change management, scope management duly assessing the effort to address the changes in scope if any, assessing the expertise required to address these changes, and configuration control.

- Detailed Project Plan with start date and end date of each activity for each functional module
- Project Governance structure and management
- Detailed project plan with comprehensive list of deliverables along with the timelines
- Resource loading and the mechanism to bring in new members to the team due to attrition or any other reason
- Risk management and mitigation plan
- Mechanisms to monitor the project timelines
- Format of deliverables

The Project plan is a very essential item for IIMKs resource planning for the project.

Part 10 – Project Team structure

The Technical proposal should contain details of the project team for implementation, and the profiles of the experts with highlights of their experience as relevant to this project. The Resource experience and qualifications are mentioned in Annexure VI

Part 11 – Support and Maintenance

The bidder should give an overview of the support methodology, resource allocation, the mechanisms for managing the support work at IIMK, the mechanism for change management, scope management duly assessing the effort to address the changes in scope, if any

Part – 12 Cloud Architecture recommendation

Bidders to recommend Cloud Architecture for three system landscape and make available Sandbox during the development of the project. These details are to be submitted in the Technical bid

Part – 13 Software Development, mobile applications, application developments, integrations, analytics, work flow developments and Portals

The technical bid should include all this aspect

20.1 All Documents will be scanned and uploaded in the E-Procurement Portal. Any document

not received in soft copy through E-Procurement portal will not be considered in Technical evaluation.

20.2 Pricing Information will not be included in the Technical bid. Bidders shall ensure that NO pricing information of any type is shown in their technical bid. The Bidder shall note that the Form of RFP annexed in Technical Bid is for their information and the amount of Bid shall not be indicated in this Form of RFP in the Technical bid. Inclusion of pricing in any place other than Price bid (BOQ) may result in rejection of the RFP.

20.3 The Bidder shall submit one set of all documents except price bid (BOQ) has to be submitted through e-tender portal duly completed and signed, along with other documents mentioned, to the address for communication given in the NIT on or before the date and time specified therein. The list of documents to be uploaded in the e-tender portal is provided in Annexures and forms [●]. For technical evaluation, only the documents submitted online shall only be considered.

20.4 The Bids will be opened at the date and time specified therein. Hard copies of the Technical Bid which are submitted through online must be reached before the specified date and time of opening of bid.

20.5 Signature: All the submissions constituting the Proposals of the bidders must be digitally signed. The Proposals must be digitally signed by the authorized representative (the "Authorized Representative") as detailed below:

a) by a partner, in case of a partnership firm and/or a limited liability partnership; or

b) by a duly authorized person holding the Power of Attorney, in case of a Limited Company or a corporation;

c) In case the authorized person holds a General Power of Attorney (GPA) to sign the bid documents, a notarized copy of the GPA should be attached with the proposal.

d) The original RFP format and accompanying documents must be written in indelible ink and shall be signed by the person(s) duly authorized to sign on behalf of the Bidder.

e) Written power of attorney accompanying the offer shall indicate such authorization. The person(s) signing the offer shall sign all pages of the offer except for un-amended printed literature. The name and position held by each signatory must be typed or printed or sealed below the signature.

f) The RFP should be written legibly and free from interpolations, erasures or over writings or conversions of figures. Correction where unavoidable, should be duly attested by the signature(s) of the Bidder(s) with dates. The rates should be written in words as well as in figures.

21. Receipt of Hard Copy Of Technical Bids:

21.1 The hard copies of documents mentioned in as per RFP [●] must be received by the Chief Administrative Officer, at his office in IIM Kozhikode, IIMK Campus PO, Kozhikode 673570, not later than the time specified in the RFP.

21.2 Bids received through post shall be accepted provided the same reaches CAO, IIMK prior to the expiry of the stipulated time. The Bids submitted by the bidder without uploading

the same in the e-tendering portal will be summarily rejected.

21.3 IIMK may, in exceptional circumstances and at its discretion, extend the deadline for submission of proposals by issuing an addendum/corrigendum or by intimating all bidders who have been provided the RFP, in writing or through e-mail, in which case all rights and obligations of IIMK and the bidders previously subject to the original deadline will thereafter be subject to the deadline as extended.

22. Opening of Bids:

22.1 **Opening of Technical Bid:** Technical Bids of the Bidder, received up to closing time on stipulated date shall be opened on 16.09.2021 at 04:00 p.m. The Technical Bid and Price Bid (BOQ) shall be opened as per the following procedures:

   a) In the first instance the Technical Bid will be opened on time specified in the RFP and if Pre-qualification criteria are in line, there after the bid will be further considered for Technical evaluation. Otherwise, the tender will be treated as invalid.

   b) The Price bid (BOQ) of the Technically Qualified Bids will be opened at subsequent date under intimation to the qualified bidders.

22.2 **Opening Of Price Bid**:

   a) Bids, which are found to be in conformity with Tender requirements, shall be considered as qualified for opening of Price Bid (BOQ).

   b) The Bidders found to be qualified and responsive shall be informed about the date and time of opening of their Price Bids. On the stipulated date and time, the Price Bids of Qualified Bidders shall be opened.

22.3 **Incomplete or Part Tender:** Bid must be submitted for executing all works involved and any bid for doing a portion of the work with responsibility for carrying out the remaining works by the Management/ other contractors, will be liable for outright rejection.

22.4 **Delivery Schedule and Penalty for Delay:** The delivery/completion period shall be as per the delivery schedule mentioned in **section 1.4 Implementation Scope and Timelines.**

22.5 **Payments:** payment will be as per the payment schedule mentioned in the section **5.0 Payment Terms** of this tender document.

22.6 **Post Go Live Support and AMC:** The Vendor will be required to provide AMC support for a period of five (05) years after three months of 'Post Go Live' and Handholding support. IIMK reserves the right to renew or discontinue after / from 1st year. Hence the AMC for the subsequent years will be issued separately before the beginning of each term.

22.7 **Placing the Order**: The Tender submitted shall clearly mention the name of the firm in whose favor the order is to be placed. Any request made after submitting the Tender for changing the name of the firm in whose favor the order is to be placed shall not ordinarily be entertained.

22.8 **Force Majeure :**If either party is prevented from the performance of its obligations in whole or in part for reasons of Force Majeure, viz., acts of God, acts of Government, acts of public enemy, war, hostility, civil commotion, blockade, sabotages, riots, fire floods, earthquake, explosions, epidemics, strike and lawful lockout, the period of Force Majeure shall be excluded accordingly. If Force Majeure event(s) continue beyond the period of three months, the parties shall hold consultation to chalk out the further course of action. Neither party can claim any compensation from the other party on account of Force Majeure.

22.9 **Conciliation:** Any dispute or difference whatsoever arising between the parties relating to or arising out of contract, shall be settled first by conciliation in accordance with the Govt. Rules and settlement so rendered between the parties in pursuance thereof shall be final and binding

22.10 **Accommodation, Gate Pass, etc.:** The Vendor shall be responsible for obtaining gate passes its personnel in connection with the execution of the project. IIMK in this regard shall provide necessary assistance to obtain gate pass.

22.11 **Institute to be indemnified:** The Contractor shall at all times indemnify and keep indemnified the Institute and its officers, servants, agents and any other guest or person moving in the Campus Area premises from and against all third party claims whatsoever (including but not limited to property loss and damage, personal accident, injury or death of/to property or person of any Sub- contractor and/or the servants or agents of the contractor, any sub-contractor(s) and/or the Institute) and the contractor shall at his own cost and initiative at all times up to the successful conclusion of the Operation & Management period specified in Clause 17 hereof take out and maintain all insurable liabilities under this Clause, including but not limited to third party insurance and liabilities under the Motor Vehicles Act, Workmen's Compensation Act, Fatal Accidents Act, Personal Injuries Insurance Act, Emergency Risk Insurance Act and/or other Industrial Legislation from time to time in force in India.

22.12 **Code of Conduct** – The selected bidder must abide by the code of conduct and principles of ethics of IIMK. Breach of any code of conduct may lead to termination of the contract.

22.13 Compliance of Statutory Obligations: The selected bidder will be liable and responsible for all compliances of its firm under the relevant statutory legislation and undertakes to pay all statutory payments, contributions, applicable taxes as may be due and payable under various laws. So, the vendor will be required to comply with all statutory obligations from time to time applicable to this contract. In the event of violation of any contractual or statutory obligations by the vendor, the vendor shall be fully and solely responsible for the same. Further, in the event of any action, claim, damages, suit initiated against IIMK by any individual, agency or government authority due to acts of the vendor, the vendor shall be liable to make good / compensate such claims or damages to the IIMK. As a result of the acts of the vendor, if IIMK is required to pay any damages to any individual, agency or government authority, the vendor would be required to reimburse to IIMK such amount along with other expenses incurred by the IIMK or the IIMK reserves the right to recover such amount from the payment(s) due to the vendor while settling its bills

22.14 The successful bidder has to ensure safety of other work/property of IIMK. In case of any damage to the property of IIMK then the same would be deducted/realized from the payments of the bidder. The selected bidder shall be responsible for any minor / major incident / accident with their staff deployed at IIMK for the smooth execution of the contract.

22.15 The selected bidder should sign an NDA (Non-disclosure agreement) as per **Form No-7.**

22.16 **Mobilization time:** The vendor will commence the work in four weeks from the date of receipt of order.

22.17 **Arbitration:** In the event of a dispute or difference of any nature whatsoever between Bidder and IIMK during the course of the assignment arising as a result of this proposal, the same will be referred for arbitration to a Board of Arbitration. Such Arbitration shall be governed by the provisions of the Indian Arbitration and Conciliation Act 1996. Arbitration will be carried out in Kozhikode or Kochi

22.18 **Jurisdiction:** For all matters pertaining to this tender shall be subject to the jurisdiction of the courts in Kozhikode or Kochi.

22.19 **Limitation of Liability:** Notwithstanding anything to the contrary elsewhere **contained** herein, the maximum aggregate liability of Bidder for all claims under or in relation to this Agreement, shall be, regardless of the form of claim(s), shall be limited to 100% of contract value.

22.20 Any Other Condition:

   a) The change in quantities should be restricted to +/-10% maximum of the quantity quoted as per RFP.

   b) Bidder agrees to provide the increased quantity at the same terms and conditions. However additional prices shall be charged for the services supplied over +10% of RFP and rates should be as per rate card

Vendors are to abide by all the Terms and Conditions stated in the Tender Document. In case these terms and conditions are not acceptable to any Tenderer/ Bidder, he/she should clearly specify the deviations in his/her tender. IIMK reserves the right to accept or to reject them. In case of any dispute, the decision of the Director of the Institute shall be final and binding on all the parties.

Sd/-

Lt Col M Julius George (Retd)
Chief Administrative Officer

Date: 05.08.2021

ABBREVIATIONS

IIMK	Indian Institute of Management
BG	Bank Guarantee
EMD	Earnest Money Deposit
ERP	Enterprise Resource Planning solution, a COTS used for automation of business functions like finance, HR, materials management, payroll, procurement etc.
SLA	Service Level Agreement
SEI – CMM	Software Engineering Institute - Capability Maturity Model
COTS	Commercially off the shelf: The software application which is readily deployable with or without configuration to suit the customer's specific process requirements and does not involve developing the application from scratch. The software application which is implementable or deployable and maintainable by any other competent agency other than the manufacturer or agency which has developed the software. The software solution available with complete transparency including operation manuals, help documents and source code. The software solution which has preconfigured templates of business processes, technical features and provides a predictable operational performance
PQC	Pre-Qualification Criteria
ATS	Annual Technical Support
TEC	Technical Evaluation Committee

8. Annexures

Annexure I: Broad Functional Requirement Specification (FRS) - Separate Documents

SI No	Function	File Name	Page No
1	Finance and Accounts	Annexure I_IIMK_FRS_Finance	72
2	Human Resource Management	Annexure I_IIMK_FRS_HR	84
3	Payroll	Annexure I_IIMK_FRS_Payroll	94
4	Purchase & Store Management, Asset Management	Annexure I_IIMK_Purchase & Asset Management	99
5	Academic system including Student Life Cycle Management		
	PGP	Annexure I_IIMK_FRS_PGP	112
	EPGP Kochi	Annexure I_IIMK_FRS_epgpkochi	129
	EPGP Online	Annexure I_IIMK_FRS_epgponline	141
	MDP	Annexure I_IIMK_FRS_MDP	153
	FPM	Annexure I_IIMK_FRS_FPM	155
6	Self Service Portal		
	Director's Dashboard, Dean's Dashboard, CAO's Dashboard	Annexure I_IIMK_FRS_Dashboards	164
	Faculty Self Service Portal	AnnexureI_IIMK_FRS_Faculty_SelfservicePortal	169
	Student's Self Service Portals	AnnexureI_IIMK_FRS_Student_SelfService_PGP AnnexureI_IIMK_FRS_Student_SelfService_ePGP AnnexureI_IIMK_FRS_Student_SelfService_FPM	171 173 175
	Staff Self Service Portal	Annexure I_IIMK_FRS Staff_Selfservice	177
7	Academic Administration	Annexure I_IIMK_FRS_Academic Admin	178
8	Alumni	Annexure I_IIMK_FRS_Alumni	180
9	Director's Office	Annexure I_IIMK_FRS_Directors office	181

10	Engineering	Annexure I_IIMK_FRS_Engineering	183
11	Estate, Transport, Logistics	Annexure I_IIMK_FRS_Estate Transport Logistics	184
12	Hostel Management	Annexure I_IIMK_FRS_Hostel_Management	186
13	International Relations	Annexure I_IIMK_FRS_International Relations	189
14	Library System	Annexure I_IIMK_FRS_Library system	191
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17	Student Affairs	Annexure I_IIMK_FRS_Student Affairs	195
18	Applications & Integrations	Annexure I_FRS_IIMK_Applications & Integrations	196
19	Consultancy Projects	Annexure I_IIMK_FRS_Consultancy Projects	200
20	Research	Annexure I_IIMK_FRS_Research	201

Table 15: FRS Document list

ID	System Functionality - Finance	Bidder's Solution - Configuration(CO)/Customization(CU)/Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Organisation Structure & General**		
1	Allows definition of legal entity, its Zonal, Regional, circles, divisional offices etc.		
2	Definition of regions, sub-regions to meet legal requirements		
3	Definition of country, regions, sub-regions to meet legal requirements such as Central taxes/ duties, state taxes and local corporation taxes & duties. E.g., Central sales taxes, local tax, VAT, Octroi or entry tax.		
4	Handle Accrual Based accounting system		
5	Flexibility to define fiscal year including stat month and end month		
6	Ability to define 12 periods / month within fiscal year		
7	Provision for separate logical periods for the purpose of annual closing activities		
8	Multiple sets of same books of accounts are permitted.		
9	Allows closing of fiscal periods to restrict transaction posting.		
10	Allows to keep multiple periods open across financial years or within financial year		
11	Ability to reopen closed period, subject to valid authorization.		
12	Ability to define exchange rates within multiple currencies vis-à-vis base currency.		
13	Ability to process transaction entered in foreign currency based on the exchange rates definition, in an online mode.		
14	Tracking of all foreign currency transaction in both transaction currencies as well as base currency.		
15	Flexibility to choose rules for posting of such revalued items at the at the end of the fiscal year and end of period for each type of account such as receivable, payable, assets		
16	Flexibility options for posting of these differences meet criteria defined by the Indian Accounting Standards		
17	Ability to draw complete set of books of accounts such as profit and loss account, balance sheet for the legal entity, each circle, division, Zone etc.		
18	Availability of various document types for different financial transaction		
19	Availability of system generated numbering for the documents		
20	Availability of option of manual numbering for certain documents		
21	Numbering sequence for all documents is reset per fiscal year.		
22	Supports legal requirements such as TDS, sales tax, VAT, excise duty, service tax and works contract tax fully.		
23	Ability to define applicable GST / excise or VAT or any other indirect tax rates and flexibility to change the rates in case of change in statute Ability to generate reports in the statutory return format (eg: 24Q for TDS, Form GSTR1, 3B etc)		
24	Supports capturing of various indirect tax like VAT etc codes		
25	Real Time Posting from Sub Ledgers to General Ledger and without the process of schedule		
26	Flexibility to control posting to specific ledger accounts with specific documents		
27	Flexibility to date formats, number formats per user.		
28	Record and tracking of audit objections and corrective actions taken		
29	Reconciliation of all units in the field and head office		
30	Powerful search engines and queries.		
II	**Audit Trail**		
31	For reopening of fiscal year periods		
32	Tracking of user, date and time for each transaction		
33	Tracking of changes made to any document		
34	Tracking of creation and changes to any master data in the system		
35	Tracking of creation and changes to any set up data in the system		
36	Tracing of changes to authorization profile/ approval profile		

III	General Ledger		
37	Ability to define chart of account as per Organization requirements Accounting Standards		
38	No restriction of the arrangement or the number of accounts		
39	Allows grouping of general ledger account for the purpose of account management		
40	Common grouping and coding methodology of Accounts covering all Circle & Divisional Offices.		
41	Allows creating general ledger accounts in online mode		
42	Allows creating general ledger accounts in batch mode using external interface		
43	Can block. / delete general ledger accounts if posting are to be blocked		
44	Possible to map general ledger account codes to specific business transaction in other modules		
45	Ability to post transaction from other modules to online mode based on such pre defined criteria.		
46	Allows creation and posting of journal entries online or in batches		
47	Allows definition of recurring transactions and periodicity of recurrence.		
48	Creates these automatic transaction based on predefined criteria		
49	Allows to create reversal of journal vouchers with date definition for reversal		
50	Automatics reversal of vouchers based on predefined criteria		
51	Allows definition of certain GL accounts in a way that individual transactions can be tracked based on its open status. E.g. Security deposits, clearing accounts etc		
52	Allows manual clearing of such accounts by matching transaction		
53	Option to capture due dates for such security deposits and query/ reports to highlight deposit/ advances which are due for repayment.		
54	Flexibility to define rules for automatic clearing of such accounts and clearing of open items based on such criteria.		
55	Allows cash accounting with multiple cash points for a single or multiple cash GL accounts		
56	Ability to define banks, bank accounts within the system		
57	Allows upload of bank statements into the system		
58	Allows the manual entry of bank statements into the system		
59	Allows defining the criteria for bank reconciliation and carries out bank reconciliation based on pre-determined criteria.		
60	Allows entry to incoming cheques for current as well as future period and segregation based on dates possible.		
61	Allows to view and print cheque deposit statement for a day.		
62	Captures value date for cheque deposited and payment		
63	Enables calculation of interest based on value dates captured in the system		
64	Flexibility to write certain validation rates to support business rules which are not supported directly by standard product feature		
65	Built in maker checker concept for approval of documents by supervisory authority		
66	Supports success of transfer of all revenue statement account balances to retained earnings on closer of fiscal year		
67	Ability to transfer balances of profit and loss account to retained earnings account multiple times during a fiscal year closing process		
68	Should comprise of Cash Book, Bank book, Journal and different Ledgers for advances, security deposits etc		
IV	Accounting - Query/ Reporting requirements		
69	Allows listing of all transaction for particular document type in books of accounts		
70	Ability to query all accounts and transactions on line for current and previous periods including previous fiscal years		
71	Flexibility in definition of transaction fields that are displayed in such query/ report based on requirements without any programming efforts.		
72	Ability to drill down from balance to individual transactions for any account.		
73	Ability to take these annual accounts at legal entity level, circle, Zone, division etc		

V	Account Payable		
	Account Payable – General		
74	Allows creation of vendors in the system and vendor codes can be		
75	Numeric		
76	Alphanumeric		
77	Vendor numbers can be generated by the system		
77	If required vendor codes can be manually assigned		
78	Captures critical vendor information such as		
79	Name and address, key person at vendor company		
80	Captures state where vendor is located		
81	Captures email ID of vendor		
82	TAN No, PAN No, ST, VAT and WCT Regn. No.		
83	Bank account details		
84	Payment terms, discount terms, payment methods		
85	TDS related information		
86	Legal status of the vendor such as corporate, non-corporate etc.		
87	Allows creation of vendor codes in an online mode as well as in a batch mode		
88	Allows to define payment terms in following scenarios:		
89	Standard payment term of payment due after specific no. of days		
90	Payment term where discount is offered as interest component for early payments		
91	Payment term which allows retention money		
92	Allows blocking of specific vendors so that transactions with such vendors cannot be entered		
93	Allows linking of many vendors to capture group exposure/transaction volume		
94	Allows linking of vendors with customers in case a company is both vendor as well as customer		
95	Allows creation of vendors' financial data independent of purchase and materials related data		
96	A unique vendor code can be used for all the divisions, branches, multiple legal entities based on the requirement		
97	Allows to define various TDS rates, works contract tax rates in the system and attach relevant rates to vendors based on the applicability		
98	Allows clearing of vendor transactions by matching two or more open debit and credit items		
99	Allow to segregate and track vendor transactions into:		
100	Normal invoices and payments		
101	Advance payments to vendors		
102	Guarantees		
103	Security deposits with vendors		
104	Bank guarantee, letter of credit to vendors		
VI	**Accounting and Vendor credit processes**		
105	Allows invoice processing		
106	With respect to a Goods Receipt Note (GRN) in the system		
107	With respect to capital job note in case of capital asset receipt		
108	With respect to service entry note in case of a service vendor		
109	with Expense voucher where vendor is credited without PO/GRN in the system		
110	Supports typical 3 way match (PO, GRN, Vendor invoice) bill passing process		
111	Considers quantitative details from GRN and price details from PO during the 3 way match		
112	Bills are processed based on PO, GRN even if invoice does not match with value arrived at using these two documents		
113	Ability to prompt/automatically deduct all deductible charges such as TDS, works contract tax, surcharge on these taxes at the time of vendor bill processing		
114	Ability to automatically account for all these deductions based on pre-determined criteria		
115	Defaults master data information of vendor during invoice processing		

116	Allows defining parameters to determine whether default master data information can be changed during processing and changes are allowed only based on this. The same can be done only based on authorization.		
117	Allows entry of transaction in vendor account:		
118	In online mode		
119	In a batch mode		
120	Allows to evaluate amount of pending GRN for invoice processing to arrive at provision figures		
121	Triggers commitment and updates budget on issue of purchase orders for goods/services		
122	Ability to track duplicate invoice based on vendor code and invoice number		
123	Ability to post debit notes and credit notes as well as print these for sending across to vendors		
124	Ability to calculate overdue interest for vendors based on individual transaction due dates in following scenario:		
125	Interest is accrued at each period end for all outstanding line items beyond due date		
126	Interest is accrued only at the time of payment of principal. Till then although interest is calculated, however, not accounted for		
VII	**Payment Processing**		
127	Ability to process vendor payment in:		
128	Manual payment mode		
129	Automatic payment processing based on predefined parameters		
130	Allows payment for following scenarios:		
131	Advance payment adhoc		
132	Advance payment only against purchase orders		
133	Payment against one or multiple invoices - matching amount		
134	Payment against one or multiple invoices - partial amount		
135	Payment against one or multiple invoices - adhoc amount		
136	Ability to capture and report capital and revenue advances separately		
137	Ability to block certain vendors invoices so that they cannot be paid unless cleared by appropriate authority		
138	Ability to block certain vendors invoices so that they cannot be paid unless appropriately approved		
139	Allows to process one or more vendor invoices, debit notes, credit notes and allows to make net payment		
140	For the purpose of automatic payment processing system enables:		
141	Allows to run payment program for future date		
142	Allows to process multiple payment programs runs for different dates, same date – different criteria		
143	Identification invoices due by a particular date		
144	Allows to select/deselect certain invoices for payment processing		
145	For the purpose of payment processing, allows to pay on one single day		
146	Flexibility to process payment of all invoices at one go, however, strictly on due date basis		
147	Based on the process, posts accounting entries in bank accounts as well as vendor accounts		
148	Takes cognizance of TDS requirements and deducts TDS whenever necessary		
149	Clears vendor items wherever clearing is possible		
150	During payment (automatic or manual) system automatically calculates discount if any and proposes net amount for payment processing		
151	Ability to generate accounting entry after considering discount figures and posting of entry based on pre-determined account mapping		
152	Allows maintenance of Cheque stationery and tracking of Cheque based on available stationery and usage		
153	Allows printing of cheques for various banks		
154	Option of sending payment details to banks in a soft copy format so that payment processing can be carried out by a bank		
155	Option of Cheque printing by banks on transfer of payment instruction and updation of Cheque nos. back in the system		
156	Allows printing of payment advice along with Cheque which may be sent across to vendors along with their payment		

157	Ensures updating of Cheque register on printing of Cheque as well as updates the payment voucher with details of Cheque no.		
158	Flexibility to update Cheque register in case cheques are issued manually, cheques are destroyed, damaged etc.		
VIII	**Reports**		
159	Statement of account for the purpose of sending it across to vendors for balance and transaction confirmation, with an option to define format of confirmation letter		
160	Due date wise analysis of vendor accounts		
161	Ageing analysis of vendor line items		
162	Vendor account trial balance		
163	Vendor account line item details		
164	Vendor account details segregated into:		
165	Invoices and payments		
166	Advances paid to vendors		
167	LCs and bank guarantees to vendors		
168	Vendor account balances and transactions per vendor control account		
169	Allows regrouping of vendor balances based on debit/credit balances		
170	Ability to vies/print all the above vendor account and line item reports per branch, division, location etc.		
171	Allows to capture separate ageing analysis for 'small scale industry; (SSI) vendor		
172	Allows to extract details of purchase orders, GRNs invoices, accounting documents of individual vendors		
173	Allows to segregate imported and indigenous purchases and expenditure in foreign currency		
174	Allows to extract details of capital commitment made by the company		
175	Ability to provide details of payments segregated into onetime payment, early payment and delayed payment		
176	Ability to report on total volume of business generated, discounts earned from vendors		
IX	**Cash & Bank receipts and payments accounting and Reconciliation**		
177	Should be able to record cash transactions and post accounting entries for those transactions		
178	Should be able to post entries for Cash receipts from Tax payers in cash journal		
179	Should be able to post entries for Cash payments to Vendors in cash journal		
180	Should be able to maintain separate cash accounts for each cash office		
181	Should be able to record accounting entries for business transactions posted by the cashier		
182	Should be able to restrict post direct entries into cash account		
183	Should be able to create master record for Bank and different accounts maintained with the Bank		
184	Should be able to post entries for Cheque receipts from Tax payers		
185	Should be able to post entries for Cheque payments to Vendors		
186	Should be able to do Bank Reconciliation by manual posting of statements		
187	Should be able to do Electronic Bank Reconciliation by automatic upload of Bank statements		
X	**Budget Management**		
188	Facility to automatically upload into the system the budget estimates provided by all the departments in a template		
189	Support budget dimensions such as:		
190	Division or Location or Department		
191	Responsibility / sub-responsibility		
192	Account code		
193	Provide flexible budget hierarchy to define budgeting level		
194	Facility for direct manual entry of amounts for individual budget items apart from formula builder and percentage revaluations		
195	Ability to consolidate budgets of various departments, divisions, locations into one budget		
196	Provides budget vis-à-vis actual comparison on a on-line basis as well as periodic intervals		

197	Ability to support user-defined budget availability controls to specify which accounts do not allow actual exceed budget or otherwise		
198	Support the monitoring of various budget types such as original budget, supplementary budget, budget carry-forward (unutilized budget amounts carried forward from previous years), budget transfers.		
199	Online tracking of expenditures vis-à-vis budget at any level.		
200	Online enquiry of budget availability for a department / expense head		
201	Option to send an e-mail to the concerned department requesting the expenditure if the cumulative expenditure exceeds the budget		
202	Flexibility to report against different versions like budget estimate, revised estimate, etc. for the year		
203	Ability to export the budget data into text or excel format that can be used by the publisher for publishing		
204	Budget versus actual expenditure report for all or a selected set of offices and expenditure heads for the current year as well as the previous ones		
XI	**Asset Management**		
205	Centralized definition of fixed asset categories, description, multiple depreciation rates, predefined residual values etc.		
206	Centralized definition of content of the Fixed Asset Register to support statutory requirements		
207	Centralized/ decentralised definition of location data structure		
208	Ability to maintain parent -child relationship across asset classes		
209	Ability to support WDV/ straight line method of depreciation		
210	Maintain FA register locally at units with custodian wise identification.		
211	Automatically consolidate FA Register at units into FA Register for the organization		
212	Prevent units from entering/updating data in any FA Register other than their own FA Register		
213	Categorize assets based on multiple like plant assets, moveable-immovable etc.		
214	Maintain parent - child asset relationships		
215	Ability to differentiate between new asset and value adjustment / upgradtion like capacity expansion		
216	Merge one asset into multiple fixed assets and vice versa into one fixed asset		
217	Provision to rectify errors in recording fixed assets in the same period or in previous periods		
218	Record number of units against each fixed assets		
219	Generate Fixed Assets schedule in accordance with the statutory requirement		
220	Ability to handle impairment of asset as per accounting standard		
221	Retire entire or part of an existing fixed asset		
222	Record salvage value, sale proceeds, cost of removal etc		
223	Automatically calculate gain/loss on retirement		
224	Record reason for retirement		
225	Record mode of retirement eg sold, scrapped, donated etc		
226	Ability to identify assets awaiting disposal		
227	Option to assign each fixed asset to custodian		
228	Record the physical location of each fixed assets		
219	Generate reports on fixed assets at specific location		
220	Record transfer of fixed assets from unit to unit, one location to another or from one employee to another etc		
221	Record insurance details against each fixed assets		
222	Revalue an existing fixed asset or a group of fixed assets or all fixed assets belonging to a category or all fixed assets in the fixed assets register		
223	Reclassification to automatically update depreciation rates		
224	Reclassify individual fixed asset or a group of fixed assets		
225	Provision to record manufacturer's serial number		
226	Provision to facilitate physical verification of fixed assets by printing fixed assets reports location-wise, employee-wise, category-wise etc		

227	Provision to enter/ electronically upload fixed assets physical verification data for the system to list out or alert missing fixed assets or not at recorded location or not with recorded employee		
228	Create accounting automatically for fixed assets addition, depreciation, recategorization, revaluation, retirement, transfer etc		
229	Automatically interface accounting entries to General ledger		
230	Facilitate drilldown facility from the GL to individual fixed asset transaction in the fixed asset module		
231	Support change of useful life and effective rate of depreciation		
232	Run/ roll back depreciation multiple times		
233	Suspend depreciation on specific or categories of fixed assets for specified period of time		
234	Maintain depreciation data cost centre wise		
235	Forecast the depreciation and written down for any user defined periods		
XII	**Accounts Receivable and Reporting**		
236	Allows clearing of Customer transactions by matching two or more open debit and credit items		
237	Allow to segregate and track Customer transactions into:		
238	Normal invoices and receipts		
239	Advance receipt from Customers		
240	Guarantees		
241	Security deposits from Customers		
242	Bank guarantee, letter of credit from Customers		
243	Should be able account for the receipts from the customers through various modes like cheque, cash, drafts, bank transfers		
244	Allows receipts for following scenarios:		
245	Advance receipt adhoc		
246	Receipt against one or multiple invoices - matching amount		
247	Receipt against one or multiple invoices - partial amount		
248	Receipt against one or multiple invoices - adhoc amount		
249	Ability to block certain customers, so that no transactions can be made without further approval		
249	Allows to process one or more customer invoices, debit notes, credit notes and allows to make net receipt		
250	Based on the process, posts accounting entries in bank accounts as well as customer accounts		
251	Ability to do interest calculations on the overdue customer invoices		
252	Ability to run and print reminder letters to the customers on the overdue items based on the severity levels		
253	Ability to generate Balance confirmation letters for the customers for audit and record purposes		
254	Ability to do regroup the credit balances in the customer accounts as per audit requirements		
255	Statement of account for the purpose of sending it across to customers for balance and transaction confirmation, with an option to define format of confirmation letter		
256	Due date wise analysis of customer accounts		
257	Ageing analysis of customer line items		
258	Customer account trial balance		
259	Customer account line item details		
260	Customer account details segregated into:		
261	Invoices and receipts		
262	Advances paid to customers		
263	Customer account balances and transactions per customer control account		
264	Allows regrouping of customer balances based on debit/credit balances		
265	Ability to view/print all the above customer account and line item reports per branch, division, location etc.		
266	Allows to segregate Exports and indigenous sales		
267	Ability to report on total volume of business generated, discounts given to customers		
268	Should be able to generate various reports on customer sales based on various dimensions like Geography, market, location, product, customer, etc		

ID	System Functionality - Finance	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
	Management Accounting		
I	**General**		
1	Ability to define internal organization structure like SBUs/LOBs/Locations/Profit Making Units across multiple legal entities		
2	Ability to generate complete trial balance, P & L account and Balance Sheet at these levels		
3	Ability to create departments/functions etc as flexible hierarchy to roll up cost		
4	Ability to do planning at the above two hierarchies		
5	Ability to maintain multiple planning versions		
6	Ability to post simultaneously (REAL TIME) to the above hierarchies while posting to General Ledger		
7	Ability to create costing account heads independent of General Ledger account heads		
8	Ability to maintain statistical key figures to record certain cost data		
9	Ability to allocate cost based on the above key figures		
10	Ability to allocate cost in the same original GL account Head to multiple cost centres or other cost objects		
11	Ability to apportion cost on iterative basis on various statistical key figures		
12	Ability to create flexible cost objects to collect cost for specific purpose / objective		
13	Ability to settle such collected cost to another cost object		
14	Ability to settle such collected cost to another capital asset		
15	Ability to have independent posting period outside General Ledger		
16	Ability to maintain independent number range for documents posted for costing		
17	Ability to assign Fixed Assets to Cost Centres		
18	Ability to charge of Depreciation to assigned cost centres automatically, while posting Depreciation entries		
II	**Cost collectors**		
19	Ability to create cost buckets to collect costs in addition to normal accounting posts		
20	Ability to derive the costs centers or cost collectors automatically based on the normal accounting postings		
21	Ability to assign budget for these cost collectors		
22	Ability to track the actual costs and budget costs on these cost collectors		
23	Ability to set up availability control on these cost collectors and set up warning or error messages when the budget exceeds / matches the actual costs		
24	Ability to create these cost collectors either as statistical or real orders		
25	Ability to compile the total costs in the primary cost collectors and settle the costs to other cost collectors		
26	Ability to create various reports about the costs collected in these cost collectors at various time periods and compare them with the budgets		

ID	System Functionality - Finance	Bidder's Solution - Configuration(CO)/Customization(CU)/Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Customer Master**		
1	Allows creation of customers accounts in the system and customer accounts codes can be		
2	Numeric		
3	Alphanumeric		
4	Customer numbers can be generated by the system		
5	If required Customer codes can be manually assigned		
6	Captures critical Customer information such as:		
7	Name and address, key person at Customer company		
8	Captures state where Customer is located		
9	Captures email ID of Customer		
10	TAN No, PAN No, ST, VAT and WCT Regn. No.		
11	Bank account details		
12	Payment terms, discount terms, payment methods		
13	Legal status of the Customer such as corporate, non-corporate etc.		
14	Allows creation of Customer codes in an online mode as well as in a batch mode		
15	Allows to define payment terms in following scenarios:		
16	Standard payment term of payment due after specific no. of days		
17	Payment term where discount is offered as interest component for early payments		
18	Allows blocking of specific Customers so that transactions with such Customers cannot be entered		
19	Allows linking of many Customers to capture group exposure / transaction volume		
20	Allows linking of Customers with Vendors in case a company is both Customer as well as vendor		
21	A unique Customer code can be used for all the divisions, branches, multiple legal entities based on the requirement		
22	Customer master data should have linkages to Financial accounting		
23	Customer master data should have interest calculation indicators		
24	Customer master should have sales related fields		
II	**Sales Billing, Invoicing, Rebates, Credit Management**		
25	Should be able to create Inquiry from the system		
26	Should be able to generate quotation from the system		
27	Should be able to generate Sales orders in the system with single or multiple items		
28	Should be able to generate scheduling agreements in case of continuous supplies		
29	Should be able to generate Contracts in case of continuous supplies		

30	Should be able to generate Billing document form the system		
31	Should be able to generate Invoice document form the system		
32	Should be able to reserve the materials for Sales		
33	Should be able to post Material consumption on Post goods issue online and real-time		
34	Should be able to generate accounting documents for Post Goods issue online and Real time		
35	Should be able to Financial accounting entries for Sales online and Real time		
36	Should be able to incorporate various conditions into sales orders for additional costs like Freight		
37	Should be able to incorporate various Tax conditions into sales orders for additional costs like VAT, Excise duty etc		
38	Should be able to generate Rebate settlements based on agreed conditions		
39	Should be able to configure various pricing procedures for different locations or markets		
40	Should be able to configure various pricing procedures for various customers groups		
41	Should be able to accommodate different discount patterns in the pricing procedure		
42	Should be able to have different communication media for invoices and Billing documents		
43	Should be able to generate Quantity related Debit / Credit notes and generate accounting documents for the same real-time		
44	Should be able to generate Non Quantity related Debit / Credit notes and generate accounting documents for the same real-time		
45	Should be able to completely integrate into other modules like Financial accounting, Management accounting, Production planning, Materials management, Quality management etc		
46	Should be able to monitor the credit limits sanctioned at overall level and individual level		
47	Should be able to update the credit limits used / gained on Sales or Receipts resp		
48	Should be able manually give enhancements to the credit limits on adhoc basis with appropriate approvals		
49	Should be able to generate Sales orders for the services provided		
50	Should be able to recognize revenue on the on the service orders serviced		
51	Should be able to generate Billing and Invoices based on Mile stones of the project in case of consultancy projects		
52	Should be able to generate Resource related Billing for consultancy projects		
53	Ability to block certain customers, so that no further invoicing can be made to them		
III	**Accounts Receivable and Reporting**		

54	Allows clearing of Customer transactions by matching two or more open debit and credit items		
55	Allow to segregate and track Customer transactions into:		
56	Normal invoices and receipts		
57	Advance receipt from Customers		
58	Guarantees		
59	Security deposits from Customers		
60	Bank guarantee, letter of credit from Customers		
61	Should be able account for the receipts from the customers through various modes like cheque, cash, drafts, bank transfers		
61	Allows receipts for following scenarios:		
62	Advance receipt adhoc		
63	Receipt against one or multiple invoices - matching amount		
64	Receipt against one or multiple invoices - partial amount		
65	Receipt against one or multiple invoices - adhoc amount		
66	Ability to block certain customers, so that no transactions can be made without further approval		
67	Allows to process one or more customer invoices, debit notes, credit notes and allows to make net receipt		
68	Based on the process, posts accounting entries in bank accounts as well as customer accounts		
69	Ability to do interest calculations on the overdue customer invoices		
70	Ability to run and print reminder letters to the customers on the overdue items based on the severity levels		
71	Ability to generate Balance confirmation letters for the customers for audit and record purposes		
72	Ability to do regroup the credit balances in the customer accounts as per audit requirements		
73	Statement of account for the purpose of sending it across to customers for balance and transaction confirmation, with an option to define format of confirmation letter		
74	Due date wise analysis of customer accounts		
75	Ageing analysis of customer line items		
76	Customer account trial balance		
77	Customer account line item details		
78	Customer account details segregated into:		
79	Invoices and receipts		
80	Advances paid to customers		
81	Customer account balances and transactions per customer control account		
82	Allows regrouping of customer balances based on debit/credit balances		
83	Ability to view/print all the above customer account and line item reports per branch, division, location etc.		
84	Allows to segregate Exports and indigenous sales		
85	Ability to report on total volume of business generated, discounts given to customers		
86	Should be able to generate various reports on customer sales based on various dimensions like Geography, market, location, product, customer, etc		

ID	System Functionality -Student Finance	Bidder's Solution - Configuration(CO)/Customization(CU)/Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
1	**Student Accounting**		
1	Student Fee Calculation		
2	Student fee collection for various fee components based on the different programs.		
3	Collect and capture the hostel fees.		
4	Collect the student fees at various events like registration, examinations etc.. and generate payment receipts.		
5	Refunds management and posting to Finance.		
6	Ability to collect both the structured and unstructured fees like penalties		
7	Manage incoming and outgoing payments		
8	Scholarships (Merit based and category based)		
9	Individual Student Ledger and account statement		
10	Merging with bank fee collection portal		
11	Reports Related to scholarship		
12	Mess fee collection, accounting & settlement		

ID	System Functionality - Functional Human Resources	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Human Resources Management - General**		
1	System should be able to define organization structure with clearly defined reporting structure and should also be assigned to Cost structure		
2	System should be able to adapt according to changing organization structure		
3	System should be able to record department and position reporting structure. Organisation Unit could be department or office		
4	System should be able to implement multiple reporting authority (some persons reporting to two different authorities)		
5	System should be able to capture and report the vacancies in advance		
6	System should be able to provide the following details Number of posts sanctioned, Number of posts filled, Number of posts vacant		
7	System should have a single sign-on access across all applications, as per the roles and responsibilities defined and should be web enabled		
8	System should have user authorizations designed for various level for data entry, authorization and viewing		
9	System should allow for additionally attaching documents to the employee record in non-editable pdf format		
10	System should allow for storing employees' historical data without limitation		
11	System should support Multiple Locations (Offices / Campuses)		
12	System should support Multiple Modules like PF, Pension, Payroll etc. detailed in functional requirements		
13	System should have dual authorization and maker checker facility required for all transactions like Payroll, Leave etc., depending on: Nature of Operation (transaction entry, change, deletion, blocking, batch update, end-of-day processing, etc.)		
14	System should maintain calendar definition, along with timings, for each location/branch of the Institute, capturing Weekly holidays, Public Holidays, Unscheduled Holidays, location specific campus holidays		
15	System should have a provision to capture the details of Advisor/guest speakers/ visiting faculties/Consultants, although they should not be taken as Employee of the Company. The system should allow for certain bill processing for them.		
16	System should be able to segregate employees in various categories - role wise, salary level wise, experience wise, qualification wise various categories - role wise, experience wise, qualification wise		
II	**Human Resource Capital - Accounting**		
17	System to facilitate headcount accounting at Cost Centre/Office/Department level; across categories, types , salary grades, offices for various offices.HR accounting feature essential; with scope for analytics and report generation; aligned to financial accounting		
18	System to facilitate dashboard view of headcounts, classified at macro level; with analytics		
19	System to facilitate HR action reports, headcount reports, error reports		
20	System to facilitate creation of positions , closure and delimitation as per business needs		
21	System to align HR accounting to financial accounting across all offices; eg Manpower Budget and expenditure.		
22	System to facilitate assignment of each position as well as each holder to respective Business Cost Centers; for respective cost analytics at macro level.		
III	**Human Resources - Authorisations**		
23	System to facilitate to restrict assigning varying authorisations to view/action over positions and/or holders to various employee categories / holders by name based on business need of the respective office. System administration to be regulated across all staff/faculty to protect integrity and ensure confidentiality.		

24	System to facilitate Confidentiality of HR data , to view/process/edit/action to respective process owners as per approvals by competent authority.		
25	System to facilitate delegation of Financial authority to various officials as per approved Delegation of Authority.		
IV	**Human Resources Management - Employee Master**		
26	System should record employee information (Basic and transactional information) as per the service book of the organization. Below are the areas for which employee information needs to be captured.		
27	Employee ID		
28	PF Number		
29	Name : Including Prefix/First Name/ Middle Name/ Surname		
30	Father's Name & Mother's Name		
31	Marital Status		
32	Spouse Name		
33	Children/ Dependents Details		
34	Permanent Address		
35	Address for Communication		
36	Phone Numbers / Contact Information (with STD/ISD code		
37	Professional Experience		
38	Home Town		
39	Home State		
40	Nationality		
41	Nationality of Spouse		
42	Domicile State		
43	Sex		
44	Religion		
45	Category (SC/ST/OBC/MINORITY/GENERAL/EWS/DIFFERENTLY ABLED along with percentage of disability)		
46	Date of birth		
47	Date of joining, probation period, date of confirmation		
48	Bank Account No.		
49	Bank Branch Name and code		
50	Blood group		
51	Education Qualifications – should capture the details of name of the examination passed, university/Institute, month & year of passing, percentage of marks obtained, grade/class obtained, details of trainings attended		
52	Joining details including Date of Joining, Joining Pay scale		
53	Employment Type (Faculty/Staff/Research) and Sub type (permanent/adjunct/visiting/contractual/Academic Associate/Research Associate)		
54	Employment Area details - Area/Sub Area/ Department/ Section		
55	Present Job code/designation		
56	Present Grade/cadre		
57	Deputation, temporary transfers		
58	Date of Increment		
59	Date of joining in the present place of posting		
60	Date of Retirement		
61	Father's Name & Mother's Name		
62	Insurance entitlement/ benefits of the employee		
63	Details of submission of Assets & Liabilities statement		
64	Name and address of referee		
65	Promotion details– scale and department wise		
66	Languages known, with details of speak, read and write separately		
67	Aadhar Number		
68	Medical Records- Vision, Allergic conditions, other Risks under medication		
69	Special needs/ capabilities		
70	Dependent particulars		
71	Nomination particulars for each Scheme/benefit		
72	Previous Employer details, position held, reason for leaving, NOC		
73	System should be able to scan and Store documents related to previous employments, education etc.		
74	System should be able to scan and Store Employee photo, Signature, Qualification Degrees, Experience details, Certificates, CVs etc.		
75	System should be able to scan and Store KYC document details such as Passport, PAN Card, Adhaar Card, Driving License, Voting Card		

76	System should record details of spouse – name, name of the organization the spouse is working with, type of organization (state government, central government, public sector, private sector, local body, own) and is the spouse liable for transfer, LTC claims, Medical Claims, other claims		
77	System should record details of the dependents including relationship, their date of birth, studying in school/college, monthly income/pension amount		
78	System should record details of relatives in the service of Institute including name, Employee Code., branch/office where working, designation and relationship of Institute including name, Employee Code., branch/office where working, designation and relationship, Date of Joining the Institute		
79	System should record Date of termination/restoration		
80	System should record History of trainings attended like name of the course, name of the Institution, month & year of training, duration of the course in days/weeks		
81	System should record Awards received by the employee including the name of the award, year of award, in which discipline/filed and date of receipt of award		
82	System should record History of disciplinary actions against the employee including date of charge, nature of charge, Current Vigilance details, amount of financial loss to Institute, date of punishment and nature of punishment		
83	System to facilitate online self declaration by employees on Property, Declarations to Finance for TDS/Form 16, Declarations for receipt of Gift, commissions from external sources, etc		
V	**Human Resources Management - Recruitment**		
84	Facility to raise the Manpower requisition for Permanent Faculty , Staff and Contract positions (Vacant or likely to fall vacant positions)		
85	System to have workflow with multi level approval the manpower requisition		
86	System to have ability to align and classify vacancies, per reservation category, aligned to Recruitment Roster as per SC/ST/OBC/PH guidelines applicable. Compliance to SC/ST/OBC/PH/Ex. reservation guidelines on classification of vacancies for hiring actions.		
87	Need the ability to track and report the requisition status		
88	Need the ability to publish the advertisement in news paper and internal/external job boards		
89	Need the ability for the candidates to create profile and apply for the job (online application)		
90	System should be able to upload the candidate's applications received on the Institute website in different formats (word, pdf etc.)		
91	System should be able to capture fields that can help in filtering and screening of the CVs		
92	System should be able to provide applicant's data to the authorized users (respective dean/head/chair etc.)		
93	Need the ability to automate screening of the candidate's Age, Caste, Skills, Qualification and other critical information against job requisition and shortlist		
94	System should be able to capture the Test scores of all the applicants		
95	System should be able to provide multi-level online approval workflow for shortlisted and finally selected candidates		
96	System should be able to capture the process of interview panel formation(chair, panel members etc.) and outcome of interviews conducted with appropriate parameters		
97	Need the ability to track candidate status against job Posting		
98	Need the ability to send communication to candidates about the interview date		
99	Need the ability to form Interview panel with internal and external employees		
100	Need the ability to Interview panel to view candidate profile and resumes online		
101	Need the ability to track the interview process and results		
102	Need the ability to generate a report to reimburse the claims to candidates		
103	Need the ability to approve and finalize the candidate based on interview		
104	System should be able to capture the observations, recommendations and reason for rejections		
105	Need the ability to perform background check with Government law and order agency		
106	Need the ability to track background and physical/medical test		
107	System should be able to create, email and print the offer letter to selected applicant		
108	Need the ability to rollout the offer online		
109	Need the ability for the employee to accept the offer online followed by offline hard copy		
110	Need the ability to analyze the recruitment cycle lead time and identify any bottlenecks		
VI	**Human Resources Management - Reports/Returns/MIS**		
111	System to generate monthly establishment report, as per employee classifications, entries and exits		

112	System to generate periodical reports of Staff/faculty on promotions, demotions, grade changes and other internal moves		
113	System to generate periodical reports for GSLI Returns to LIC		
114	System to generate periodical Reports on SC/ST/OBC/PH/Ex-servicemen Status		
115	System to generate Attrition Reports- for all events		
116	System to generate Retirement planning Reports		
117	System to generate Succession Planning reports on turnover forecasts		
118	System to generate Headcount/Utilisation Reports per approved budget, periodically		
VII	**Human Resources Management - On boarding**		
119	Need the ability to capture personal and dependent information		
120	Need the ability to upload the Testimonials and certificates online		
121	System should be able to classify employees as permanent/contractual/on project etc. and apply respective remuneration rules		
122	System should be able to capture all relevant personal, professional, educational and family related details as per the employee master database System should be able to send the joining announcement mail as HR completes the data entry formalities, System should be able to provide notification to concerned departments for email ID,space,system,network id, ID card creation and other facilities		
123	System should be able to capture the accounts relevant data and share automatically with finance on on boarding		
124	Need the ability to send relocation expenses to payroll		
VIII	**Human Resources Management - Probation**		
125	Need the ability to provide performance rating of the probationary employee to Concerned official		
126	Need the ability to push digitally the report to the CAO/Dean / Director		
127	Need the ability to confirm employee or extension of probation based on the performance; for new joined as well as on promotions / appointments on selection.		
128	System to facilitate change of ID Cards, Visiting Cards on promotion		
IX	**Human Resources Management - Promotion**		
129	Facility to capture set of rules for promotion like years of service by dept.		
130	System to allow identification of candidates for their financial upgradation		
131	system to have the ability to derive next promotion date for the employee based on the promotion rules		
132	System to have ability to align and classify vacancies, per reservation category, aligned to Promotion Roster as per SC/ST/OBC guidelines applicable. Compliance to SC/ST/OBC reservation guidelines on classification of vacancies for promotion actions.		
133	Ability for department heads to recommend high performers for promotion		
134	Facility for HR dept./committee generate list of eligible staff		
135	Facility for HR dept. to send communication to all departments about promotion initiation		
136	Facility for selection of experts in the system for evaluation		
137	Need the ability for CAO / Deans to interview along with experts		
138	Need the ability for the experts to access the work report online		
139	Need the ability for capturing minutes of the DPC(Departmental Promotion Committee) meeting		
140	Need the ability for intimation of the financial benefits to the concerned person with CC to all other concerned		
141	Facility to generate a list of vacant positions(Budgeted headcount - Current incumbents)		
142	identify reservation rules for these vacant positions		
143	Facility in the system for director to approve the Vacant position lists		
144	Need the ability to maintain the Position tree		
145	Need the ability to generate seniority list of staff members		
146	Need the ability to identify eligible employees based on service years		
147	Need the ability to create work report online for the eligible employees		
148	Need the ability to look back for employee's 5 years performance report		
149	Need the ability to form the Promotion committee		
150	Need the ability to call staff for Personal interview		
151	Need the ability to track the Personal Interview feedback and recommendation		
152	Need the ability to finalize the list and send it for approval		
153	Need the ability for the Director to approve and record comments (MoM)		
154	Need the ability to issue change of designation order.		
155	Need the ability to pay fixation to new position's pay scale		
156	Need the ability to generate the Promotion roster		

X	Human Resources- Performance management & Potential assessment - Staff		
157	System should provide performance management tools for tracking and reporting, at periodic intervals		
158	System should support probation to confirmation process through appraisal process as well		
159	System should provide managers the documented performance objectives, goals and development plans of potential appraisals		
160	System should allow evaluation of the employee as per the performance evaluation metric set by IIMK		
161	System should have functionality to compare appraise and appraiser ratings online		
162	System should support online secure access to employees to complete performance appraisals		
163	System should be able to allow the Institute level, department level and individual level goal setting and sharing with staff.		
164	System should be able to allow the individual to do the self-appraisal and submit it to respective HoD for approval. System should be able to allow the individual to withdraw the self-appraisal document.		
165	System should allow appropriate authority to set a window for submission of self-appraisal document. System should not allow submission of the document post the last date without relevant approval		
166	System should be able to allow the HoD to route it to appropriate authority for approval or comments.		
167	System should be able to capture the outcome of appraisal process and its monetary recommendation, career improvement recommendation etc. System should be able to expose the relevant data to staff related to outcome of approval process.		
168	System should record competencies and proficiency required for each job matching with the available competencies of employees. The system should make competency assessment on pre-designed metrics and should facilitate in all employee development initiatives like recruitment, training, succession planning, appraisals etc.		
169	System should be able to allow the evaluator to mention the suggested training to the employee during appraisal.		
170	System should be able to generate a consolidated report for all the suggested trainings		
171	System should support supervising official to appraise the competencies of the subordinate		
172	System should create Performance documents for employees depending on the cadre / grade in the organization		
173	System should be able to record superior's appraisal and approval for the appraisal		
174	System should give weightage to each key parameter and points against each rating attained		
175	System should support maintenance of history of performance appraisals and promotions		
176	System should have the facility to release of increments for qualifications acquired and also for stagnation increments, FPA, PQA etc. and it should be integrated with the payroll module and other relevant modules		
177	System should have facility to support generation of increments due for each month or for user defined period for employees – cadre wise/scale wise/ other user defined combination. IIMK upgradation policy for stagnation also to be included		
178	System should generate automatic reminder letters / mails / workflows to the employees/ appraising authorities in case of non-submission of self-appraisals, etc.		
179	System should support memo letters / mails / workflows to be issued to the employee in case of unsatisfactory performance		
180	System should capture the details of assets & liabilities as furnished by the officers at the end of every year		
181	System should support maintenance of history of assets & liabilities details furnished by officers		
XI	Human Resources Management - Appraisal - Faculty		
182	System to facilitate capture of Consultancy assignments, Research work, Patents , if any, Presentation of Papers, Publications besides Teaching as part of individual faculty performance and Institute academia deliverables		
183	System should be able to allow the Institute level, department level and individual level goal setting for mid-term evaluation and publishing it to individual faculty.		
184	System should be able to allow the individual faculty to do the self-appraisal and submit it to Area Chair/Director/Dean Academic/Committee to consider.		
185	System should be able to allow the Area Chair/Faculty/Dean Academic/Committee to capture feedback need to be provided to faculty.		

186	System should be able to allow the Institute level, department level and individual level goal setting for final evaluation and publishing it to individual faculty.		
187	Performance Credit System (PCS) application system to be there for the reference		
188	System should be able to capture the final result faculty appraisal system for payroll and accounting purpose according to policy.		
189	System should be able to capture the recommendation and observation of committees and publish it to individual faculty.		
190	System should be able to capture the increment details of the staff and should be able to calculate and pay any back dated arrears to the staff.		
XII	**Human Resources Management - Appraisal - Transfers**		
191	System should have automation of transfer process and related workflow with facility to configure rules		
192	System should have facility for Transfer/redeployment of officers based on requirement/sanction strength of other campus like Kochi		
193	System should generate various reports based on employee master data for transfer like user defined criteria, request transfer list, completed 3 years, transfer on promotion etc as per IIMK Policy		
194	System should enable inter department transfers/ transfers to the institute's other campuses at other locations, generation of letters and details like leave balance, encashment availed, mediclaim premium and claims, LTC etc.		
195	System should have provision to exempt an employee from being transferred		
196	System should enable Relieving –Relieve date to be captured and the placement details to be updated accordingly. Provision to generate the Relieving order. Provision to capture if the quarter has been vacated at the transferor Region Provision to capture the confirmation given by the office regarding the deletion of user-id from all the system / packages of the office immediately on relief.		
197	System should have provision for modification / cancellation of transfer orders		
198	Ability for the reliving department head to send a transfer request for his employee		
199	Ability for the employee to request for the department transfer		
200	Facility for CAO to approve the request		
201	Facility for HR to issue transfer order to staff		
202	Need the ability to track the staff joining date		
XIII	**Human Resources Management - Appraisal - Delegation**		
203	Ability for Managers to selectively delegate the access to other employees		
204	Facility for proxy manager to have all required access to perform transaction		
205	Facility for managers to provide delegation access for a particular window		
XIV	**Human Resources Management - Retirement**		
206	System should be able to create report/alert for pending retirements		
207	System should be able to provide workflow for the settlement for retiring staff and intimation various departments		
208	Need the ability to identify employees who are retiring in next 6 months based on their age and date of hire		
209	Need the ability to send communication to employees about their leave balance, pending LTC and relocation allowance		
210	Need the ability to generate and share the retirement benefits with the employees, 3 months prior to their retirement		
211	Ability for HR to acknowledge once Pension papers are received from employees		
212	Need the ability to track NoC from all relevant Departments		
213	System should be able to calculate the pension, full and final settlement etc as per policy		
214	Need the ability to calculate employee's Pension payments		
215	Need the ability to get multiple level of approval on Pension payment		
216	Need the ability for the employee to request for Voluntary retirement		
217	Need the ability to check for VRS eligibility based on service years and approve/reject the request		
XV	**Human Resources Management - Resignation**		
218	System should be able to allow the staff member to submit the resignation to respective HoD and HR department in order to intimate them		
219	System should be able to route the resignation to approving authority for further approval and HR department is to be intimated. System should be able to handle the rejections with appropriate reason. In both cases stake holders should be intimated. In case of rejection, initiator should be able to resubmit the request with required changes if any.		
220	System should be able to intimate the staff about resignation acceptance/resignation with reason.		

221	System should be able to accept the clearance from all relevant departments and assist in full and final activity by HR department.		
222	System should be able to allow the faculty to submit the resignation to Director.		
223	System should be able to intimate the faculty, HR department, Accounts department once Director approves the resignation.		
224	System should set the default last date for employees upon approval of resignation. The default last date should be 3 months from the date of approval for faculty and 1 month from the date of approval for non-faculty.		
225	System should be able to allow appropriate authority to modify the last date.		
226	System should be able to assist in resignation letter generation by HR department.		
227	System should be able to accept the clearance from all relevant departments and assist in full and final activity.		
228	System should be able to create report/alert for impending faculty retirements and send it to HR department Accounts department.		
229	System should be able to calculate/capture the dues, pensions, full and final settlement etc. as per the policy.		
230	System should be able to route the settlement (leave encashment, PF, NPS etc. as applicable) for faculty, retiring (Voluntary Retirement/ Compulsory Retirement) or resigning (resignation or termination), to the Director for approval and intimation to HR department and Accounts about status of approval for further action. System should be able to handle the rejections with appropriate reason. In both cases stakeholders should be intimated. In case of rejection initiator should be able to resubmit the request with required changes if any.		
XVI	**Human Resources Management - Off boarding**		
231	System should be able to allow submission the resignation to Area Chair/Faculty.		
232	System should be able to route the resignation to approving authority for further approval. System should be able to handle the rejections with appropriate reason. In both cases stake holders should be intimated. In case of rejection initiator should be able to resubmit the request.		
233	System should be able to intimate HR department and accounts department after Dean Program approval. System should be able to handle the rejections by Dean Program with appropriate reason. In both cases all stake holders should be intimated. In case of rejection initiator should be able to resubmit the request with required changes if any.		
234	System should be able to accept the clearance from all relevant department (No dues process, e-separation) and assist in full and final activity.		
235	System should be able to allow the submit the resignation to reporting Faculty.		
236	System should be able to route the resignation to reporting faculty for approval or rejection with reason and intimate to HR and Accounts department. In both cases stake holders should be intimated. In case of rejection initiator should be able to resubmit the request with required changes if any.		
237	System should be able to accept the clearance from(e- separation) all relevant department and assist in full and final activity including generation of reliving letter, issuing certificate etc.		
XVII	**Human Resources Management - Disciplinary Action & Grievance**		
238	System should be able to capture grievance details or allow online grievance submission and create unique ID for each grievance.		
239	System should be able to capture the outcome of grievance redress system and record recommendation of grievance committee.		
240	System should be able to route the recommendation to Director and Director should be able to modify the recommendation.		
241	System should be able to intimate the recommendation and action taken report, to the grievance committee		
242	Ability to record warning/disciplinary actions		
243	Ability to generate warning/disciplinary letters		
XVIII	**Human Resources Management - Leave Management**		
244	Facility to capture the leave application online, for all types of leave, with appropriate leave type and all leave policies applied.		
245	**System to provide tracking of ALL ABSENCE TYPES** : availing of earned Leave, half pay Leave, casual leave, compensatory off, Tour absences, unauthorised absence, half pay leave on medical grounds, Maternity leave, Paternity leave, Restricted holiday, Vacation leave, flexible leave, variable leave.		
246	Should be able to provide approval workflow for leave process as per the employee type. The systems should cover all absences Including Compensatory Off		
247	Able to handle deletion of booked leave with appropriate reason and allow user to resubmit the request with required changes if any.		

248	System should be able to allow the reporting authority of staff to approve or reject the leave with reasons.		
249	Able to configure leaves for various employee types as per institute policy		
250	Should link leave record to payroll and employee history		
251	System should be able to transfer people from one leave structure to another leave structure with balance of leave in previous structure (on promotion from staff to officer)		
252	structure to another leave structure with balance of leave in previous structure (on promotion from clerk to officer)		
253	System should allow conversion of Vacation leave to Earned Leave (Half of the Vacation leave can be converted to Earned leave if not availed by Faculty)		
254	System should process leave encashment		
255	System should maintain Leave encashment record		
256	System should interface between attendance captured with that of leave record		
257	Facility for Sabbatical leave		
258	System should support comprehensive leave approval rules for - Barred combination of leave Leave pre-fixing and suffixing with other leaves Leave pre-fixing and suffixing with weekly-off and paid holidays Minimum and maximum no of days at a stretch in a specific type of leave		
259	System should have an alert for the supervisors if someone remains absent without approval for more than a Functionality Description no. of days and enable the supervisor to send notice to the employee, if necessary. Letter and mail should be generated by the system		
260	System should automatically update the leave details and notify employee, once leave application is approved by the appropriate authority		
XIX	**Human Resources Management - Work / Time Scheduling**		
261	Should be able to maintain festival holiday calendar and Restricted holidays		
262	Should be able to approve work requests on holidays		
263	Should be able to avail Compensatory Off against work on holidays		
264	Should facilitate recording of International tours, participation of conferences , workshops as part of work schedules for Faculty		
XX	**Human Resources Management - Leave Travel Concession**		
265	System should be able to verify employee LTC eligibility and capture LTC details		
266	System should have the facility to enquire on leave balances / LTC block end date at any time		
267	System should have the provision to caution the forwarding authority in case more than a given percentage of employees of the cadre already sanctioned with leave during the period for which the current request is being processed.		
268	System should have the provision to store LTC details of the employee like Home town, Block begin date, block end date and change of the block end date on expiry of the block automatically		
269	System should have the provision to receive the LTC application online along with the leave application and sanction and conveying the same online.		
270	System should have the provision for extending the LTC block of the employee		
271	System should have the provision to process Leave Encashment and deduction of Income Tax as per rules, along with LTC.		
272	System should have the provision for reversion of Leave Encashment and Block in case of modification.		
XXI	**Human Resource- Medical Claims, Education Claims, FDF, SCEDF, Travel Claims**		
273	System to facilitate faculty/staff to raise claims via workflow requests for all the above items		
274	System to integrate authorisations, and reporting levels and accounting Cost centers to such work flow requests , along with Initiator particulars , automatically.		
275	System to log workflow processing authorities credentials automatically.		
XXII	**Human Resources Management - Over Time**		
276	System should have the provision to allow configure staff attendance and overtime policy.		
277	System should be able to capture attendance and overtime for staff as per the policy		
278	System should be able to generate and share overtime with HoD with relevant policy applied		
279	System should be able to route the Overtime to approving authority for further approval. System should be able to handle the rejections of Overtime for employees with appropriate reason. In both cases stake holders should be intimated. In case of rejection initiator should be able to resubmit the request with required changes if any.		
280	System should be able to able to send the approved		

281	Overtime to payroll/accounts department for payment.		
XXIII	**Human Resources Management - Housing**		
282	System should be able to capture and process the relevant details for house allotment (type of house, occupancy status, maintenance details, shortlisting for allotment), maintained in system by facility department, and HR department should be intimated with required information. This section needs to be validated by Estate Management Section within Gen Admin Department		
283	System should be able to track the status of house allotment and maintain a waiting list		
284	System should be able to report the available facilities or accessories that are available to allot or need to be procured.		
XXIV	**Human Resource - Travel Services**		
285	System should be able to create the travel request (local, domestic, international), with appropriate itinerary and route it to competent authority for approval before sending it to accounts for processing as per the policy for the type of travel and category of traveler through workflow.		
286	System should be able to allow the accounts to process the advances if any and to transfer it to traveler's account.		
287	System should be able to allow the traveler to submit the expenses incurred during the trip and attach the scanned copy of proofs. System should be able to print the expense report and submit it with actual proof to account if required.		
288	System should be able to allow the accounts to process the reimbursement as per the policy and transfer the reimbursed amount to traveler's account.		
289	System to facilitate expense records of International Travels undertaken by each Faculty/Staff as part of Work		
290	System to assist in validation and monitoring of Vendor claims / settlements		
XXV	**Human Resources Management - Service workflow**		
291	System to facilitate tracking of Workflow requests initiated by faculty/staff/Office, pending for approvals, pending with HR for processing, Approved for payments, Pending with Payroll for payments, ability to view Reasons for holding the workflow, Time taken for clearance . This should cover all Service requests raised through workflow by staff/faculty		

ID	System Functionality - Functional Human Resources General	Bidder's Solution -Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
1	Dynamic workflow for committee approvals in academic environment in all above scenarios where ever applicable		
2	Signed document flow to be supported with workflow of approval hierarchy		
3	Work flow to be developed for all type of Forms / Service Requests - forms like quarter booking , accommodation booking, CPF etc		
4	Workflow for approvals of delegation of Authority, notifications, periods of validity, exception clauses etc with automatic e-mail notifications to all concerned.		
5	Workflow approvals for activation/notification/circulation of various Chair Committees appointed periodically.		

SL No	System Functionality - Functional Area Payroll	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**General - Payroll Processing**		
1	Ability to cater Indian Central Government rules including Seventh Pay commission rules for Payment of Wages		
2	Ability for users to configure/create different pay group groups like Faculties, Permanent staff, FPM students and Contract staff		
3	Ability to support multiple concurrent payrolls like Employee, Pension, Scholarship, Honorarium and other payments. System should be able to define earning, deduction, contribution and provision heads for each pay structure depending on the eligibilities and rules applicable for each category		
4	System should support Main, supplementary/ Off cycle and partial payroll run		
5	System should maintain a single central payroll depository and should run and access payroll from any location in a centralized or decentralized manner		
6	system to support different paycheck date based on pay group		
7	Ability in the system for the employees to choose their preferred payment option		
8	System should be able to define various formulae and should link them to other calculation formula / elements such that when there is a rule change only the component which has undergone a change will be effected		
9	Ability for the administer to review employee's pay slip		
10	Ability for the administer to generate salary register		
11	Facility to generate a report with any exceptions during payroll processing		
12	Ability to identify variance and report the summary variance by pay groups		
13	Ability to identify variance and report the variance by individual employees		
14	Ability to generate earnings and deductions by Chart of Account		
15	Ability to map the earnings & deductions to Finance Chart field and post it to GL		
16	System should calculate Gratuity and superannuation for multiple trusts and user definable contributions		
17	System should be able to process applicable reimbursement as per policy guidelines		
18	System should be able to retain the PF amount as per the Institute policy		
19	System should support passing of accounting entries for salary payments and maintenance of related books of accounts, registers. Generation of month wise, quarterly wise, half-yearly and yearly statements of accounts		
20	System should provide link with accounting system or lending solution system to effect the credit of salary, loan installments to their corresponding accounts directly		
21	System should perform Pay slip number generation based on user defined logic such as category and pay mode		
22	System should be able to carry out Full and Final settlement for all types of employees as per the policy		
23	System should support payment of subsistence allowance in case of suspended employees and facility for rephrasing various staff loans when on loss of pay and suspension		
24	Ability create Form 16 for employees and all other income tax and statutory reports		
25	Ability to correct Form 16		
II	**Human Resources Department**		
26	System should be able to allow HR department to capture regular payment components (pay, grade pay etc.) details directly into the system rather sending it every time to accounts department for further processing.		
27	System should be able to allow HR department to capture events as appointment, increment, promotion, suspension, transfer, termination and retirement with effective dates for all faculty, staff and research members. System should also be able to capture the effect of these events on payment and its relation with employment as per the policy.		
28	System should be able to allow HR department to capture payment components (consolidated salary) for academic and research associate		
29	System should be able to allow HR department to process the allowances as per the policy		
III	**Attendance**		
30	System should be able to integrate with biometric data source and leave management system to Payroll		
IV	**Earning**		

#	Requirement		
31	system should have ability to adopt Indian Central and State (for deputed employees) Govt Scale for the employees and process payroll based on that		
32	Need an ability to store multiple standard recurring earnings like Basic Pay, Grade Pay, DA, HRA,Transport allowance in rule table and process the same during payroll Should compute the dearness allowance (DA) using options such as Fixed DA, linkage to consumer price index (CPI).		
33	System should be able to process following payment components- Consultancy Payment, Customized Executive Education program related, Open Enrolment Program related, Children Education Allowance, Leave Encashment, LTC, Medical Reimbursement, Overtime/Extra Duty Allowance, Credits accumulated, Bonus Payment, Exgratia, Cash Award, Research Award, Consultancy, 3rd party pay off from research, Other arrears, Incentive etc.		
34	System should capture details of different perks paid to the employees/executives. Perks register and generation of perks statement for ITO		
35	System should allow Payment of employee expenses based on user defined criteria		
36	System should allow Payment of officiating allowance based on user defined criteria		
37	Ability to configure an earning as taxable and non-taxable income		
38	Ability for automatic feed of Employee data from HR during payroll processing		
39	Ability to automatic update changes based on pay commission revisions		
40	Ability to capture and process non-standard recurring earnings for an employee		
41	Ability to have an end date or goal amount for non-Standard recurring earnings		
42	Ability to enter and process non-recurring earnings for an employee		
43	Ability to track recurring earnings and report it		
V	**Deductions**		
44	Need an ability to capture statutory recurring deductions like Provident fund, Income Tax, Professional tax, License fee in rule table and process them during payroll processing. Recovery of advance along with applicable interest should be available.		
45	System should handle unlimited number of allowances, deductions. System should configure characteristics for payment, taxability, computation and so on to suit Institutes requirements		
46	System should compute the Provident Fund, Contributions, and Professional Tax where applicable at the correct frequency		
47	System should capture/access all types of loan details of an employee and the outstanding balance overdue if any through link with accounting system or lending solution		
48	System should be able to deduct any statutory and voluntary contribution from staff/faculty remuneration and also should be able to deduct for facilities availed by staff and faculty, for example license fee for house allotted at campus, electricity charges, Association etc..		
49	System should be able to process the pension as per policy. National Pension Scheme relevant tax exemption on contributions by employer and employee should be taken into account. System should allow withdrawal from from NPS and should be able to deduct the tax as per the law		
50	System should be able to generate report as per the Institute requirement for the NPS system		
51	System should be able to process the House Rent Allowance and House Rent Recovery also known as license fee according to policy. It should be able to prorate as per the usage		
52	System should be able to process, disburse and deduct the various types of loans as per the policy. Interest should be deducted from salary per month. First principle and then interest is deducted. System should be able to handle interest free loan also		
53	Need an ability to have an end date or goal amount for recurring deductions		
54	Need an ability to process one-time deductions like any salary recoveries		
55	System should perform tax computation and it should be handled as per Income Tax Act of India without any need for repeated manual calculations. The tax slabs, rates and surcharges should be maintained by the system and the tax should be computed automatically		
56	Need an ability to calculate Fringe benefits		
57	Need the Self Service ability for employees to declare the investments and expenses for Income tax exemptions		
58	Need the Self Service ability for employees to upload the soft copy of investment and expenses proofs		
59	Need an ability to remit the deductions/contributions like Income tax, PT, PF to respective agency or vendors		
60	Need the flexibility to charge the earnings and deductions to either parent or deputed departments		
61	Ability to report total deduction amount by each deduction type		
62	Ability to generate a challan for the depositing/remitting the amount to bank		

63	Need an ability to generate employee wise quarterly return (with tax amount deducted/remitted) in the format specified by Indian Income tax		
64	Need an ability for employer match based on employee's contribution		
65	Ability to generate Summary sheet of contributions by employees		
66	Ability to generate Dues report for terminated employees		
VI	**Reports**		
67	System should be able to generate monthly pay slip with all faculty and staff related details. Pay slip should be downloadable and sent to email ids of respective staff and faculty		
68	System should be able to send the alerts about impending retirements and process the retirement benefits as per the policy. Provident Fund, Gratuity, Leave Encashment, Commutation of pension should not be taxed		
69	System should be able to generate report as per the Institute requirement for the NPS system		
70	System should be able to generate all statutory reports like Pension, NPS, form 16 and institute specific reports as per requirements		
71	System should be able to generate the relevant report for bank transfer process and should be able to create the remuneration cheques for the employees who are suspended and according to other relevant policy.		
VII	**Pension Payroll**		
72	Ability to calculate retirement benefits for an employee		
73	Need an ability for system to identify Pensioner and non-pensioner		
74	Need an ability for the system to process pensioners and pay as per Indian Central government rule table		
75	Need an ability process pensioners even after their death and pay the surviving family member		
76	Need an ability to pay surviving family member based on enhanced family pension payout (For example for first 10 yrs - 50% payout and post 10yrs - 30% payout).		
77	Facility to print both regular employee earning and Pension earning on the same form 16		
78	Need an ability to support commutation and restoration		
79	Facility to capture pensioners life certificate online and process payroll based on this		
80	system to be capable to process pension payroll based on Life certificate status		
81	Need an ability to process payroll retroactively, if Pensioners submits life certificate late		
VIII	**Scholarship**		
82	Ability to record Student's scholarship		
83	Need an ability to process Student's scholarship based on his/her attendance		
84	Need an ability to process House Rent allowance on need basis		
85	Need an ability to consider retro time data changes		
86	Need an ability for student to take loan from Scholarship		
87	Need an ability to deduct Student expenses like Hostel and Mess fee		
88	Need an ability to skip income tax calculation and deduction for Scholarship payroll		
89	Need an ability to generate utilization certificate that can be sent to the external Sponsored agencies		
90	Need an ability to bill external Sponsored based on scholarship payout		
91	Need an ability to track Time bound recoveries such as Tuition fees at the start of every term		
IX	**Contract Employee Payroll**		
92	Capability to capture Contract employee's contract details including wage details		
93	Ability to process Contract employees payroll based on contract details		
94	Facility to capture process Contract employees payroll on monthly and/or one-time (lump sum)		
95	Need an ability to provide HRA or honorarium depending on their contract		
96	Need an ability to capture Contract employees attendance in system		
97	Need an ability to integrate Contract p employee's attendance data with payroll processing		
98	Need an ability to provide multiple payment options - Direct Deposit , Check		
99	Facility to map the earnings and deductions to chart fields and publish to GL		
X	**Off cycle / Supplementary Payroll**		
100	Capability to process supplementary or off cycle payroll for bonus, arrears like DA, pay fixation. The Faculty Development fund (FDF) and Professional development fund (PDF) system management and to be linked to payroll. Residential accommodation and their deductions to be linked to payroll		
101	Flexibility in system to choose the pay period for these supplementary payroll		
102	Need an ability to calculate taxes automatically		
103	Need an ability built within the system to select the supplementary payroll periods depending on the remittances		

104	Facility for employee to raise claims such as LTA, Medical, TA, telephone, tuition fees etc. through Faculty Self Service portal		
105	Need an ability for employee to submit soft copies of the bills		
106	Need an ability to route the claims for approval based on certain rules		
107	Need an ability for approvers to approve/reject/push back the claims		
108	Need an ability for approvers to record comments while verifying the claims		
109	Need an ability to send the approved claim amount to Payroll for payout		
110	Need an ability for system to generate notifications to employee and approvers		
111	Need an ability for checking travel advances/expenses against budgets		
112	Need an ability to place a commitment against COA for the travel advances		
113	Facility to capture key information (like project, dept) against each claims		
114	Ability to process relocation allowance claims of Faculty members		
XI	**Arrears Deduction**		
115	Need an ability to accumulate the deduction amount in the form of arrears for the ones that could not be recovered		
116	Need an ability to recover the deduction from arrears		
117	Need an ability to generate due and draw report statement post pay commission revision or employee promotion		
XII	**Provident Fund**		
118	Ability to deduct GPF from employee's salary		
119	Ability to maintain the GPF account by employee		
120	Need the to take loan against the contributed GPF amount as per regulations		
121	Need the to take withdraw money contributed towards GPF amount as per regulations		
122	Ability to payout the GPF at the end of the service tenure		
123	Ability to transfer in and out of PF		
124	Facility for an employee to see the PF contributions and balances in their Self service portals		
125	Ability to generate individual subscription reports		
126	Need an ability to generate annual statement		
127	Need an ability to calculate the interest on the PF contributions		
128	Need an ability to generate and view Broad sheet		
XIII	**Loan Processing**		
129	Facility for employees to raise request for loans		
130	Ability for approver to check the eligibility		
131	Ability for approver to approve/reject/pushback the request		
132	Need an ability to remit the approved loan amount to employee's bank directly		
133	Need an ability to recover the loan as part of the monthly payroll		
XIV	**Service Book**		
134	Facility to capture and maintain all employee details and actions performed during the entire employee life cycle in Employee Service Book/ Employee Information System		
135	Along with the vital employee details the system should also capture details pertaining to Promotions, Increments, incentives for acquiring higher qualifications etc.		
136	Ability to capture leave records of Faculty and Group A officers		
137	System should capture details of CPF/ GPF/ NPS/ PRMS membership deductions		
138	System should capture details of GPF Withdrawal & Temporary Advance		
XV	**General Admin**		
139	Ability to request for employee Confidential reports and Confirmation orders		
140	Ability to generate and circulate general circulars to staff and faculty		
141	Ability to provide reports under the Right to Information Act		
142	certify the ID Card Forms		
143	System should capture employee grievances, proceedings and closures		
144	Ability to capture the Legal Cases and their proceedings		
145	The system should capture the resultant action for the employee in the Employee Service Book/ Employee information systems		
146	Capacity to communicate the outcome of the legal cases to stake holders e.g. information to payroll department in the event of changes in pay as an outcome of the case		
XVI	**Personal Accident Insurance and GLSI**		
147	Generation of list of employees who complete one year of service		
148	Employee filling and submitting the form		
149	Sending documents/cheques/supporting money transfer to New India insurance company regarding policy issue /renewal		
150	Membership data capture and ability to generate reports on employees under PAIS including nominee details.		
151	maintain functions of GSLI Scheme e.g. membership data, inclusion of new members, exclusions of members etc.		
152	Ability to generate various reports pertaining to GSLI Scheme at regular intervals		
153	notify the concerned whenever the GSLI claims are made or the amount is disbursed		
154	maintain data of nominees of policy holders		

Payroll

SL No	System Functionality - Functional Area Payroll	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
1	System should manage payroll as per the India payroll- public sector / GOI regulations/7th pay Commision		
2	System should be able to define multiple pay structures		
3	System should be able to define earning, deduction, contribution and provision heads for each pay structure		
4	System should run multiple payrolls in a single instance		
5	System should maintain a single central payroll depository and should run and access payroll from any location in a centralized or decentralized manner		

SL No	System Functionality - Functional Area Purchase& Material Management	Bidder's Solution - Configuration(CO)/ Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Purchase - General**		
1	System should allow Purchase requisitons to be generated from Portal.		
2	Systems should support the entire procurement , stores and inventory process of IIMK		
3	System should allow multi level approval based on the value and also support to configure level based on the financial authority		
4	Facility to allow approver to delegate his responsibility		
5	User should have the facility to attach documents like engineering drawings , specifications etc as attachment to Purchase Requisition		
6	System should be able to define multiple purchasing departments.		
7	Capability to generate purchasing history report based on the departments, material date, delivery date etc.		
8	System should support impelenting Master Governance porcess for change in all master data		
9	Facility to give warning to the user while creating duplicate masters and notify to the Administrator		
10	System should be able to track changes made to the master data and provide report for it		
11	System should keep track of all inter-related transactions e.g. Indent to Purchase order to Goods Receipt to Vendor invoice to Payment		
II	**Purchase - Vendor Master**		
12	Vndor master to have facility for recording to record the following details - minimum:		
13	Vendors with the following information: Vendor code , Name, Address(s), Contact Details (telephone, email ,fax etc.)		
14	Vendor Type (ex. Original Equipment manufacturer (OEM), Authorized Distributor, Retailer etc.)		
15	Department at which services are provided		
16	Performance Rating		
17	Vendor Bank details (Bank & Branch Name, Account Number, IFSC code, SWIFT Key, MICR number) ,Tax Information, Permanent Account Number, withholding tax rate etc.		
18	Vendor Organization Status (Corporate, Partnership, Proprietary, Small Scale Industries etc.)		
19	Payment terms, Payment method like cheque, NEFT, DD etc. (*Foreign/Indigenous, currency, payment terms). In case of DD, capture "payable at" in separate field		
20	System should be able to assign an automatically generated Alpha-numeric vendor number, to the Vendors as per material coding policy of IIMK		
21	System should be able to capture the supplying capacity, credit limit, Performance rating etc. of vendors		
III	**Purchase - Vendor Registration**		
22	Ability to classify vendors by nature of Supplies made by them		
23	Facility to generate unique Vendor ID		
24	Ability to check for duplicate vendors before vendor ID is created		
25	Ability to upload and store documents provided by Vendor for vendor creation		
26	Need the ability to create onetime code for temporary vendors		
27	Ability to approve Vendors Created online. Approval could be multiple levels with the ability to make some of the approvers as optional.		

28	Facility for Vendors to view online details such as Purchase Orders issued, Payment status etc.		
29	Facility to inactivate vendors with necessary approval		
30	System should be able to categorize vendors as Blacklisted/On hold/empanelled/vendor for Functionality Description item		
31	Facility to search vendors Item wise, category wise, region wise and service wise etc		
32	Facility to provide vendor comparison reports (rates, Performance Rating, delivery time)		
33	Facility to capture Parent/subsidiaries information for payment and material return		
34	Facility to assign agreed rates, taxes and tax rates to the vendor as per the contract		
35	Facility to generate list of pending renewals for each month based on the contract		
36	System should be able to assign agreed items/services to the vendor as per the contract		
37	Ability to provide vendor registration process		
38	System should be able to provide registration fee payment mechanism		
IV	Vendor / material master maintenance		
39	System should be able to capture following material and service details in the master at minimum:		
40	Item Group, Item/Service name, Description, Technical specifications, Quantity, Unit, Purchasing text, Expiry (if applicable), Purchase Source (Domestic/Foreign), User department and Name of the person		
41	Facility to maintain vendor reference for all Items/Services, Term of payment, Name of important contacts, Currency used in transactions with vendor, Banks information of vendor, Material Type, Sales Person detail, Material Gross weight, net weight,Unit of weight, Reminder for delivery date.		
42	Ability to generate automatically/manually Alpha-Numeric number for material and Services.		
43	Able to generate item code category wise		
44	Should be able to generate report on added/deleted/used/requested items in a period		
45	Ability to support multiple units of measure for purchasing, storing and assigning of items to users		
46	Facility to migrate old master data in the system through simple upload method		
47	Ability should be able to link vendor and material		
48	Ability to track changes made to the master data and provide report for it		
49	Ability to filter all vendors on product code / region, etc. Can supplier lists be created specifying items / services provided by the supplier		
50	system provide the functionality to generate report on addition / deletion of vendor code in a period		
51	System provide the functionality to block the vendors / to flag the vendor for deletion? Can the system prevent transactions pertaining to black listed vendors		
52	**Integration of Vendor master with the AP, GL, Purchasing, logistics, maintenance functions**		
53	Ability to maintain a record of valid rate contracts between IIMK and different vendors		
54	Ability to monitor expiry date of various agreements and warn / alert buyer (atleast one month in advance) in case purchase orders are being raised against a vendor with whom the agreement has expired		
55	Ability to define the criteria for vendor classification and ability to classify vendors based on the defined criteria such as domestic, imported, government, SSI, proprietor or combination.		
56	Ability to generate alert for annual membership, subscription renewal. Generate monthly membership / subscription due report.		
57	Ability to capture vendor related to the various agreements that the company has with the supplier for the procurement of the material such as "Supplier agreement", "Quality Agreement", "Master Confidentiality Agreement"		
58	Ability to maintain a record of valid rate contracts between the university and different vendors		
59	Ability to monitor expiry date of various agreements and warn / alert buyer (atleast one month in advance) in case purchase orders are being raised against a vendor with whom the agreement has expired.		

#	Description		
60	Ability to assign list of items / services that can be procured from the vendor		
61	Ability to assign applicable prices, taxes and corresponding tax rates in the vendor master (or any other masters) based on the vendor and material/service combination.		
62	Ability to maintain list of documentation requirements for procurement of items or services (e.g. list of import documentation)		
V	**Indent / Purchase Requistion**		
63	Ability for all bonafied users in IIMK to be able to raise online purchase requisitions /raise indent through self-service portal		
64	Facility to allow upload of file for indent creation		
65	System should capture the information pertaining to different items - consumables, capital and special items		
66	System should allow Indenter to specify fund source (Department/Project/Grant etc.)		
67	Ability to segregate PRs based on the category of request such as product category (type of inventory) like consumables, office stationary, capital, import, etc.		
68	Ability to capture the cost center at the level of creation of PR		
69	Ability to define hierarchical approval process for PR as well as PO based on financial limits / Delegation of Authority		
70	Ability to view the PR status/ pending PRs.		
71	Ability to cancel the PR in case the request is withdrawn by the concerned department (cost center).		
72	Ability to restrict/warn users on budgetary controls/ projects costs during creation of Purchase requisitions and/or during approval of purchase requisition.		
73	Ability to clearly highlight the committed expenses, actual expenses and remaining amount with respect to each cost center.		
74	Ability to create purchase order (PO) with reference to purchase requisition (PR) or contracts		
75	system to facilitate estimation of purchase which can be sent for approval as per IIMK policy		
76	Does the system provide the functionality to create indents / purchase requisitions automatically/manually based on material re-order levels, lead times associated and current inventory?		
77	Ability to show stock availability during indent creation		
78	Ability to alert user while creating PR if the stock is available at a defined level and/or pending / open PO/PR.		
79	Ability to generate auto indents based on the re-order levels / production planning. Sourcing rules be defined specifying percentage allocation of the requirements to multiple suppliers		
80	Ability to capture reason of purchase/indent on priority when stocks available		
81	Manual indents be created and approved in the system. approval hierarchies be configured based on type of requirements to take care of approval policies laid out by the organization		
82	Ability to view the indent / PR status and pending indents.		
83	Systemto provide the functionality to restrict / warn users on budgetary controls during creation of purchase requisitions		
84	System to support approval of PRs based on multiple levels of hierarchy		
85	Ability to prioritize PRs based on material requirements (emergency purchase).		
86	Can request for creation of POs be generated from the system in case of job orders / services?		
87	System to provide the functionality to generate the reports such as list of indent created during the period, list of pending indents, report on changes made to indents.		
88	Facility for request status be monitored through the system by the user department		
89	Facility to provide open PR(s) with ageing report		
90	Should restrict/warn Indenter in case of insufficient budget during creation of Indent and to approver during approval of the Indent		
91	Should be able to provide approval workflow for Indent depending on Indent value/Delegation of Authority		
92	System should be able to show the committed expenses, actual expenses and remaining budget with respect to the Department/Project/Committee etc. to the approver		
93	Facility to maintain audit trails pertaining to critical business activities for Stores and Purchase		

#	Description		
94	Ability to calculate the committed and actual budget of the respective unit (Department/Project/Committee etc.) on indent approval and actual payment		
95	Ability to show the Indent status and notify the Indenter on progress		
96	Provide facility to modify/delete Indent by the Indenter before a certain stage		
97	System to facilitate estimation of purchase and suggest the purchase method (quotations / Open tendering etc.) System should provide different online approvals as per Institute's policy for different purchasing method		
98	Individual wise quantity		
99	Facility to suggest user while creating Indent if the item is available in the Inventory		
100	Facility to allow creation and approval of manual Indent in the system		
101	Ability to consolidate multiple indents into one indent		
102	Should provide functionality to view created, deleted, pending, changed indents		
103	Ability to file Indents based on the category of Item /Service category like Equipment's, consumables, import etc.		
104	Should be able to route the Indent to Stores and purchase department post Indent approval		
105	System should be able to find empanelled vendors for type of items mentioned in the Indent		
106	Should allow approver to put comments on the indent received for approval by reviewer		
107	Ablity to copy an existing Indent to create a new one.		
108	Facility to generate report by various categories i.e. user, item type, period, rejected, accepted, profile, bulk/single etc.		
VI	**Request for Quotation RFQ**		
109	System provide the functionality of sending RFQ to multiple vendors		
110	System to have provision to publish tenders on a web based portal and accept bids/quotations online.		
111	Facilty to integerate and support E-Tendering process		
112	Ability to conduct reverse auctions.		
113	Facility to support and control 2/3/4 bid tendering system		
114	Vendor quotations be captured against the RFQ/tender		
115	Provide the functionality to perform bid / quotation evaluations		
116	Can the system send out regret letters post tendering process		
117	Does the system provide the functionality for quotation management & evaluation: Ability to create cost comparison statements highlighting: Prices (including break up of charges), Lead times of delivery, Credit Terms, Other terms and conditions		
118	Does the system provide the functionality to incorporate the user defined evaluation methodology like giving different weightage to parameters for vendor selection		
119	Ability to send the cost comparision sheet along with the award decision for approval as per university purchasing policies		
120	Ability to close the RFQ / Tendering process at a predefined date and restrict further changes / processing of quotations. Further changes shall be handled thru change management process.		
121	Ability to support RFQ / Tendering for Works / Services and comparision of quotations at detailed service level		
	Ability to support percentage bidding process		
122	Ability to track Security Deposits / EMD collected as a part of the tendering process		
123	Does the system provide the functionality to generate the reports such as list of all open and limited tenders, report on EMD / security deposit collected, report on contract amendments etc		
124	Ability to convert the EMD to security deposit for the contractor whom the work is awarded and refund of EMD to the unsuccessful bidders. Ability to refund the security deposit after the successful completion of the job with adjustments, if any.		
125	Facility to allow purchase of items from Approved Catalogs / Rate Contracts where cost of items purchased regularly have latest rates updated		
VII	Purchase Order		
126	Ability to provide approval workflow for PO depending on value		
127	Facility to attach supporting documents / reports at every stage of approval		
128	Ability to create purchase order from Indent, contracts, old PO or RFQ		

129	Ability to record the item issued to personal/department/project		
130	System should be able to capture the following details in the PO: Delivery date, Location, Indent number, Material code, Quantity, Description, Agreed rate with breakup of taxes, Individual wise quantity, Installation, Buyback, Freight, Discount, Tax, Other terms and conditions		
131	Facility to generate draft copy of PO to indenter, accounts department and other stakeholders		
132	Ability to give an alert some days prior to the specified delivery date		
133	Facility for editing and maintaining the versions of POs		
134	System to provide provision to assign reason editing the PO		
135	System should be able to create a PO for multiple Indents and multiple POs for an indent		
136	System should able to attach the approval documents and suggestion given by Purchase committee to the PO		
137	Ability to provide view of the approved PO to relevant stakeholders		
138	Facility to filter POs based on the category such as consumables, capital, equipment etc.		
139	Facility to track the status of all Pos		
140	Facility to take provision of Tax and other charges applicable to International orders from the same department/Project/Committee		
141	Able to track the PO status at every stage of approval process with reasons for rejections.		
142	Ability to automatically populate the prices, taxes, tax rates, terms & condition etc. based on the information stored in the masters		
143	Signed document flow to be supported with workflow of approval hierarchy		
144	Facility to send the PO to the vendor through email		
145	System controls for printing PO only after final approval		
146	Ability to identify import document requirements during PO creation and notify the user about it		
147	capable of recognizing different approvers depending upon the value of the item being purchased.		
148	System should be able to provides the following information: Partial deliveries against a Functionality, Description PO, Turnaround time from the time of raising Indent and receipt of material, Delay by the vendor in delivering the material		
149	System to provide the functionality to track PO's/ Work Orders for services like: Security, transportation, travel, courier etc. with the following details: Date of commencement and completion of work, Nature of work, GST, Payment methods, Schedule		
150	Allow user to refer the purchase orders for the creation of Good receipt		
151	Ability to change the certain PO fields as per the changing requirements		
152	Facility to send the notification to the suppliers automatically on delay		
153	Facility to create Purchase Order in any currency		
154	Ability to capture material arrived against purchase order		
155	Ability to provide capability for partial receiving of the material/goods.		
156	Ability to allow for status tracking of all Purchase orders with history reports		
157	System provide the functionality to maintain the standard templates for the creation of PO		
158	PO to be numbered in the system automatically		
159	System provide the functionality to maintain the version control for POs in case of amendments		
160	Provision to assign reason codes while amending the PO in the system		
161	PO be created against multiple PRs/Indents and vice a versa		
162	Ability to attach various approval documents and suggestion given by Purchase committee to the PO.		
163	Ability to create purchase order (PO) with reference to purchase requisition (PR) or contracts		

164	Ability to segregate PO based on the category of procurement/service such as procurement of consumables, assets,installation & commisioning or services through civil contracts.		
165	Purchase order and amendments (Ability to add to a existing PO-new items, change quantities, pricing info, change specification etc.). For international orders take provision of custom duty, CHA charges from the same cost centre.		
166	Ability to capture status (i.e. accepted / rejected) at every stage of PO approval process with reasons for acceptance / rejections. Also, ability to attach supporting documents / reports at every stage		
167	Ability to capture the following details in the PO: date and location of delivery, PR number, material code with description and quantity, agreed upon rate including breakup of taxes, payment terms, other terms and conditions, VAT. Ability to give an alert 2-3 days prior to the specified delivery date on pending deliveries from the vendors.		
168	Facility to automatically populate the prices, taxes, tax rates, terms & condition etc. based on the information stored in the masters		
169	Purchase order to be send auto transmission over email as an option		
170	Facility to create PO's with different number range based on purchase type such as purchase for consumables, assets, civil contracts, imports etc.		
171	Facility to print POs only after final approval as per order value. Ability to print all the open PO's in a given period (sorted by date).		
172	Facility to automatically identify import documentation requirements during purchase order processing and alerting the user to ensure compliance of import documentation.		
173	System provide the functionality to define and maintain the tolerance limits for excess and short supply than the ordered quantity at the time of goods receipt? Reporting on excess / deficit deliveries for a PO		
174	Facility to capture procurement patterns in a year: i.e. collect data on material procured during the year, along with vendor details and price.		
175	System to reflect invoice wise outstanding for a particular vendor and for group of vendors		
176	Facility for system to make part payment against an invoice and balance payment process on a subsequent date		
177	Ability of the system to make payment on account to a vendor and later link it to vendor specific invoice or invoices received		
178	Ability of the system to map payment approval process in the system as per the business requirements, and facilitate the approval to be given through system (Payments voucher will be prepared by junior staff, but the final payment will be reviewed by the Supervisor). Ability to track the status of payment sorted either by particular invoice or vendor name		
179	system to record deductions from invoices under various accounts like cash discount, rebates, charges etc. with reasons for intimating to the vendor / contractor		
180	Ability of the system to support three way checking process for processing of invoices. (Three way check process specifies that goods are received on the basis of purchase order and invoice is accounted on the basis of goods received in the system)		
181	Facility in the system to block invoices and vendors for payment along with reason codes		
182	Facility for foreign currency transactions record values in both the currencies (foreign currency and the Indian currency)		
183	Facility for advances be given to vendors on the basis of purchase order		
184	System to allow to enter invoices for adhoc purchases, regular and service PO		
185	centralized and decentralized purchasing scenarios are supported in the system and can approval limits be configured in the system based on organizations purchase policies		
186	Ability to create POs with different number series based on type of procurement and location of creation of PO.		
187	Ability to place PO on principle company, receive goods from distributor and payment to distributor.		
188	Can various PO approval levels be defined in the system based on type of procurement e.g. capital / revenue		
189	Ability to view status of PO's and to track the open POs.		

190	Facility to create a PO tracking sheet which provides the following information: Identification of any deviation from service level agreement (SLA); Turnaround time (TAT) from the time of raising requisition and receipt of material; Any delay by the vendor in delivering the material (on basis of delivery schedule and actual date of receipt of material); PO track sheet shall record the GRNs raised against a particular PO		
191	Ability to capture procurement patterns in a year: i.e. Collect data on material procured during the year, along with vendor details and price.		
192	Ability to capture entire asset procurement cycle: PR's, Quotations, PO's, Asset receipt, deployment, capitalization, Transferring, disposal etc.		
193	Facility for cash / imprest purchase process to be captured in the system		
194	System to provide the functionality to capture PO's/ service orders for services like: Security, consultancy, transportation, travel, courier etc with the following details: Date of commencement and completion of work, exact nature of work, any conditions and recommendations specifically offered, evaluation arrangements, support and supervision arrangement, service tax, financial arrangement – payment methods and timing		
195	Ability to refer the purchase orders for the creation of goods receipt.		
196	Ability to change PO quantity, price, expected delivery date etc. with respect to changing requirement and close the PO (Foreclosing).		
197	Ability to send the reminders to the suppliers automatically as per the set frequency.		
198	System to provide the functionality to update the inventory account automatically upon GR		
199	System provide report on item-wise open PO		
VIII	**Annual Contracts - Job Orders**		
200	Facility to configure the workflow for review and approval of the type of Contracts to be followed based on value or nature of purchase		
201	Facility to capture information on whether the vendor has signed the various agreements such as 'Supplier declaration form', 'Master confidentiality agreement' and 'Master supplier agreement'		
202	Ability to capture the following details in the contract: contract validity dates, location of Delivery, Material code with description and quantity, agreed upon rates including breakup of taxes, payment terms, other terms and conditions, VAT.		
203	Ability to track the history of previous Contracts such as Type of Contract (Qty/ Value), number of Contracts issued, Validity Period, Performance etc.		
204	Facility to number a Contract document automatically.		
205	Ability to populate the Contract details from the information maintained in purchase requisition, vendor master.		
206	Facility to map the payment terms to the deliverables in the Contract.		
207	Facility to renew the contracts		
208	Versions and reason codes for tracking modification be maintained in the system so that a full change history to be maintained		
209	Facility to track Advances and retention amounts linked to the Contract		
210	Facility to define the components, with respect to which, prices have to be quoted.		
211	Ability to support amendments in contract terms during execution based on change requests submitted by the contractors and evaluation of the same by the respective committees.		
212	System to provide the functionality to define and configure the work flow for approval of amendments to the contract terms		
213	Facility to capture annual contracts with quantity discounts but no predetermined rates.		
214	Facility to capture annual contracts with rates/ quantity discount revised after a predefined period.		
215	System to provide the functionality to capture contract expiry dates		
216	Ability to accelerate the purchasing process by collaborating with approved suppliers/contractors online.		
217	System to provide the functionality to integrate the purchasing function with finance in order to process the payments		
218	Ability to track contract value, service delivered and payment against the budget.		
219	Ability to monitor the delivery schedules and tracking delays.		
220	System to have detailed service specifications in a way to support online confirmation of actual work done in the system. Like maintaining a online measurement book which can be used to clear payments online.		
221	Facility for service confirmations be sent for approvals.		
222	System to automatically block payment processing if service confirmations are not complete or not approved.		

IX	**Vendor Evaluation**		
223	System to provide the functionality for vendor rating and performance and reporting		
224	Ability to rate vendors by quantitative parameters like: conformity to delivery schedules, compliance to quality standards, instances of short supplies, Price review or revise request, PO amendments, No. of deliveries against each PO, agreement		
225	System to provide the functionality to rate vendors by qualitative parameters like: ability to supply within short notice, Billing and company policy related errors, past performance, communication promptness, management quality		
226	Facility for vendors to be blocked for further processing of any transaction?		
227	Facility for vendor be opened after certain period on observation of improvement?		
228	Ability to generate the report on A,B and C rating for vendors		
229	Ability to generate reports on the following parameters: 1. Item wise vendor's list 2. Vendor wise Item list 3. Vendor wise business done etc.		
X	**Commercial**		
230	Facility to track and link Proforma Invoice with LC and consignment-wise shipment details		
231	Capability to generate standard letters for Banks, like LC Opening Request, Pay Order Opening Request, etc.		
232	Facility to generate letters from system with defined parameters which are generally required from Customs Clearance, Shipping Agent's Clearance, Port Clearance, etc.		
233	Facility to capture all expenses related to LC, and divided to each consignment under one LC, port and shipping demurrages, duties and taxes, clearing and transportation charges, etc.		
234	Ability to estimate/calculate landed costs against each item of LC with reference to defined H.S. Code, and corresponding duty structure defined/declared.		
235	Facility to generate reports like, Pending LC for Shipment, Shipment Expiry reminder two weeks before LC expiry date, LC-wise, item-wise, supplier-wise cost reports, etc.		
236	Ability to capture and report C&F,Transport Billing details and processing through logical approval mechanism.		
237	Ability to capture bank limits and corresponding interest or service charges, and generating list of least cost banks while selecting LC Opening Bank		
238	Ability to capture different amendments requirements under one LC, and associated costs to respective amendment, and generate report on Bank-wise, Supplier-wise, Item-wise, etc.		
239	Facility to capture import details and generate reports, like, Country-wise, Party-wise, Item-wise, etc.		
240	Facility to generate report on delay in shipments and corresponding incremental costs being incurred for such delay		
XI	**Material Code**		
241	Facility for request for creation of material code be created in the system by the user department		
242	Facility to capture details such as material description, technical specifications, unit of measure, requesting department, name of the person, date be captured in the system while creating the request for item code creation? Can the system maintain vendor item cross references?		
243	System to give alerts on creation of duplicate material master		
244	Ability to group items as per the business requirement		
245	System provide automatic number generation facility based on the user defined parameters?		
246	Facility to track the pending requisitions for item code creation by user department.		
247	user defined workflows to be configured for approval of new item codes or amendments in item details		
248	Facility for Documents like IS Codes, drawings, specification or pictures be attached to item codes and retrieved for review.		
249	System to provide the functionality to generate the report on addition / deletion of material code in a period?		
250	Separate item codes be made available for services in the system		
251	System to support different unit of measure for buying, stocking and issuing of single item		
252	System to support different unit of measure for purchasing and issuing of single items		
253	System to keep track of any items whether purchased from local and foreign sources		
254	System to specify location of materials and movement of materials to be tracked in the system with reference to each location		
XII	**Material Management**		

255	Ability to define material handling based on the nature of the material e.g. hazardous and statutory report thereof.		
256	Ability to define material shelf-life		
257	Ability to maintain 'Warranty and/or Guarantee' details of items purchased		
258	Ability to manage returnable materials in stores e.g. high value items, tools, container, cylinders etc.		
XIII	**Material Request Stock Items**		
259	System to provide the functionality to define the Reasons for material requisition to stores are as below: 1.Initial issue 2.Consumables 3. Old returned 4.To return later on 5.Projects		
260	Ability to display the stock status to the concerned before raising the material requisition.		
261	Facility to prepare the material requisition note online.		
262	Facility to define approvals hierarchy for material requisition note		
263	Facility for online material requirement planning be carried out in the system. System to support types of planning such as reorder level based, min-max and MRP based depending upon the requirement		
264	Reorder level for items be defined in the system and parameters for shortage be defined		
265	Automatic indent creation be possible in the system based on the defined reorders level		
266	system to provide the functionality to generate the reports such as: list of material requisitions created during the period material wise; list of fresh goods receipt		
XIV	**Material Issue**		
267	System should be able to track the movement of materials with in the Institute		
268	System should be able to maintain Warranty/Guarantee details of items purchased		
269	System should be able to create, track and monitor gate pass by departments for movement of material which needs to be taken out of Institute's premises		
270	System should be able to record the item issued to personal/department/project		
271	System should be able to record items to Fixed Asset inventory		
272	System should be able to reduce inventory by the quantity issued to the user/departments		
273	System should be able to perform consumption and requirement analysis		
274	System should be able to track the expiry dates of materials and send alert at appropriate interval		
275	System to provide the functionality to generate the reports such as:		
276	Stock available in store		
277	Stock issued department wise		
278	Project wise		
279	Individual wise quantity		
280	System should be able to receive material back from user /department		
281	Ability to create, track and monitor gate pass by an authorized person for material issue / any university owned material/item which needs to be taken out of university premises.		
282	Facility to create the material issue note with reference to material requisition.		
283	Faculty to populate the details in the material requisition note directly in to the material issue note (i.e. material, quantity and department code shall not be editable by the person other than the one who has generated the material requisition note).		
284	System to provide the functionality to reduce inventory of goods by the equivalent quantity issued to the user departments from the stores upon receiving material requisition		
285	System to provide the functionality to depict the consumption Vs requirement analysis?		
286	Ability to define multiple location in a store in the system as per the user requirement.		
287	Expiry dates / 'use before date' of various materials be tracked and the message be sent to the concerned		
288	System to provides functionality to generate the reports such as: list of material issues to depict the trend in consumption; stock available in stores; cost center wise quantity and cost details		
XV	**Material / Service Receipt**		
289	System should be able to generate of receipt note for services and items against valid purchase order		
290	System should be able to support three way matching process for processing of invoices		
291	System should be able to receive partial delivery of material		
292	System should be able to validate the receipts against purchase orders		

293	System should be able to restrict receiving against a closed purchase order		
294	System should be able to populate the related details from purchase order such as item code, quantity, price, tax information etc. for preparing receipt note		
295	System should be able to capture the details such as vendor details at the time of goods receipt		
296	System should be able to post the stock as blocked stock		
297	System should be able to post the stock as restricted use stock		
298	System should be able to block invoices and vendors for payment along with reason codes		
299	System to allow invoices for adhoc purchases, regular purchases and Work orders etc.		
300	System should be able to generate reports such as: List of GRs and its value List of goods received in a period Stock availability report		
301	System should be able to receive material as per the defined tolerance limits		
302	System should be able to generate statutory reports like Tax reports as per the Institute's requirements		
303	Ability to handle emergency purchases.		
304	Gate pass to be updated in the system to keep track of arrival of goods at the IIMK premises		
305	System validate for appropriate PR and/or DO and/or PO while preparation of the gate pass		
306	Ability to receive material in installments against one single PR and/or PO		
307	Error message be given by the system if the closed purchase order is referred for the creation of goods receipt		
308	Ability to populate the related details from purchase order such as material code, quantity, price and tax information.		
309	System to provide the functionality to update the related inventory accounts automatically once the goods receipt is posted?		
310	System to provide the functionality to create the inspection notification at the time of goods receipt		
311	storage of goods be restricted to specific locations		
312	Ability to post the stock to restricted stock while the material is under inspection?		
313	Ability to post the stock as quality inspection stock (i.e. stock which is subjected to user inspection).		
314	Ability to post the stock as blocked stock (i.e. stock which can not be used).		
315	Ability to post the stock as restricted use stock (i.e. stock subjected to certain usage restrictions).		
316	Does the system provides the functionality to generate the reports such as: list of pending indents; list of pending GRs and its value; list of goods issue for a material in a period; stock availability report etc		
317	Ability to create a goods receipt (GR) with reference to PO document		
318	Ability to capture following key details in the GR document 1. Supplier delivery note/invoice & date 2. Vehicle details (if required) 3. Items 4. Quantity as per supplier delivery note/invoice. 5. Quantity as per physical count of stores-in-charge 6. Import Document reference		
319	Ability of facilitate Partial Goods Receipt		
320	Facility to define & control goods receipts against purchase order as per the control policies (e.g.: under receipt tolerance, over receipt tolerance etc)		
321	Ability to define receipt conditions such as 'Rusted', 'OK', 'partially damaged', 'fully damaged', 'incorrect packing' etc. and assign the same during the goods receipt process		
322	System to automatically generate Statutory reports like Excise & VAT reports as per precribed formats.		
XVI	**Material Return**		
323	System should be able to create Material rejection note		
324	System to provide the functionality to include the reasons for rejection		
325	System should be able to prepare the gate pass for sending materials back to vendor		
326	System should be able to handle the replacement from vendor upon disqualifying		
327	System should be able to generate reports on returns with Vendor-wise, Item-wise, department-wise etc.		
XVII	**Physical Verification**		

328	Stock levels be made available online to all concerned		
329	Ability to generate the group-wise material list from the system.		
330	System to provide the functionality for ABC classification		
331	Ability to carry out ageing and other inventory related analysis.		
332	Goods receipts, issues, stock transfers etc be blocked while carrying out the physical count document based on the material list generated		
333	Physical count be entered in the system and difference be generated by the system		
334	Facility for multiple levels of approval of inventory differences based on value be configured in the system		
335	Ability to process approval of differences and post the difference in the system through an approval mechanism. .		
XVIII	**Inventory**		
336	System should maintain stock levels for items available accurately.		
337	System should capture all relevant information		
338	pertaining to the inventory to ensure complete coverage		
339	System should be able to provide multi-department inventory management facility		
340	System should be able to provide approval process for Inventory operations as per the IIMK's policy		
341	System should be able to provide various roles like receiver, issuer and auditor		
342	Stock levels be made available to the concerned persons for audit and verification		
343	System should be able to track material location		
344	System to provide the functionality for inventory classification, ageing analysis and other related analysis		
345	classification, ageing analysis and other related analysis		
346	System should be able to block material receipts, issue and transfers etc. while physical count		
347	System should be able to provide approval process for discrepancy reconciliation		
348	System should monitor stocks and purchase orders and notify about re-order level		
349	System should be capable to assist in reorder point planning, forecast-based planning and •time-phased planning		
350	System should suggest creation of purchase		
351	requisition/order to be generated automatically when re0order level is achieved		
XIX	**Scrap Sales**		
352	Facility for system to record the list of items to be scrapped from Departments along with estimated value for the same		
353	Facility for above list be grouped into lots from time to time to facilitate Sale / Auction of Scrap and approve the same in the system.		
354	Material return slip for scrap return by the user department be generated in the system		
355	System provide the functionality for price comparison and Ability to provide the historical price data.		
356	Post Auction system to capture details like delivery order, security deposit against the above mentioned lot number / reference number		
357	Ability to record the sale process in the system and generate necessary papers to validate the sale, facilitate Gate Removal and facilitate transit.		
358	In case of Rejection, Lots should be available for reallocation for initiating re-auction		
359	System to provide the functionality to generate the reports such as: vendor compliance with lifting schedules; vendor performance report; list of counts / total weight lifted in a period; list of tenders created etc.		
360	Ability of system to identify hazardous materials / materials seperately like e-waste scrap/consumable not on deadstock etc for special disposal processes.		

SL No	System Functionality - Functional Area Asset management	Bidder's Solution - Configuration(CO)/ Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Asset Master**		
1	Ability to classify assets into various level of categories like department-wise, project- wise, or personal etc. to facilitate grouping of similar assets		
2	Ability to assign automatically/manually Alpha numeric code to new Fixed asset and integrate with barcode machine for barcode generation		
3	System should allow creating assets with all requisite information such as depreciation of asset, capitalization data etc.		
4	ability to provide fund management for assets as per statutory requirement		
5	Facility to record source of fund and custodian (Department/Project/Agency) for assets		
6	System should be able to maintain asset as per multiple acts - Ministry of Human Resource Department		
7	Facility to maintain complete asset masters with below mentioned fields at minimum: (End to end management of Fixed Asset from inventory, requisition, invoicing, depreciation etc. to take place in proposed system) Asset description Opening balance Depreciation Location Transfer/Condemnation Revaluation Closing Balance Acquisition cost Acquisition date Manufacturer and supplier Model number Warranty details Expected life Current life Installation date Salvage value Book value		
7	Ability to maintain Assets as per Indian/IIMK's Policy regulations (GFR -General Financial rule		
8	Facility to maintain purchase details like purchase order number, goods receipt details, invoice numbers, and all corresponding dates related to the Asset		
9	System should allow asset codes to be created for all the spares and components of equipments		
10	capable to track assets.		
11	System should allow to define asset master with details like Asset Code, sub-code, Asset Specification, Spares required for the asset etc.		
12	Capability to allow any change in any master details to be carried out as per maker-checker concept		
13	Flexibility to create equipment details out of asset records to track and control maintenance jobs on the assets		
14	Facility to allow automatic posting of data from Fixed Assets sub-ledger to General ledger		
15	Should be able to provide creation of equipment masters to link Project Management with asset accounting		
16	Should allow adjustment in capitalization due to exchange fluctuation		

II	Depreciation		
17	Ability to support multiple depreciation methods for each of the depreciation areas		
18	System should provide specific depreciation treatment for low value assets		
19	Allow for changing depreciation details with retrospective effect		
20	Facility to allow automatically generate accounting entries for change in depreciation details giving period-wise break-up		
21	Facility to automatically calculate and post depreciation for every accounting period		
22	System should allow calculation and posting of depreciation at duration specified by the institute, with an option of posting, posting with reversal entry		
23	Allow a specific depreciation start date, which may be different from the capitalization date (e.g.. Depreciation should start from the beginning of the period even if capitalization is mid- period)		
24	Allow for limits on depreciation (e.g.. Leased assets cannot be depreciated below 5% of the original cost)		
25	Allow both upward and downward revaluation of assets		
25	Allow depreciation calculation on revaluation.		
26	System should allow transfer of an asset to other locations, departments, divisions or branches		
27	Allow transfer of assets for both intra company code and inter company code.		
28	Facility to generate lists to support physical verification of assets		
29	Allow capitalization of assets through Capital Work In Progress(CWIP) route		
30	Allow debiting direct purchases to Capital Work In Progress(CWIP)		
31	Allow apportionment of total cost of Capital Work In Progress(CWIP) over multiple assets based on settlement profile and distribution rules		
33	System should allow for pop ups (either warning or error) in case settlement of Capital Work In Progress(CWIP) to APEX is less than 100%		
III	AMC		
34	Ability to keep track of Annual Maintenance Contracts(AMCs) of Assets		
35	Maintain asset insurance/guarantee/warranty details and generate payment schedules for insurance payable		
36	Ability to give alert for expiry or premium due date for Annual Maintenance Contract(AMC) etc.		
IV	Taxation		
37	Ability to calculate depreciation on each asset using depreciation method as defined by IT department		
38	System should allow for tax calculation procedures		
39	Ability to consolidate depreciation for taxation purposes		
V	Reports		
40	System should be able to generate following reports at minimum - Asset related to PO, Invoice, Capitalization date, depreciation rate etc. Period wise depreciation of Asset Asset head wise AMC/Insurance expiry Residual value of Asset/s on any date		
41	Ability to maintain asset register to provide all the details about every asset in the books of accounts		
42	Facility to provide reports on transactions during the year such as: Purchase of new assets Sale of assets Details of sale, transfer and written off System should be able to provide asset register (as per Schedule VI requirements) by any of the master data fields System should provide depreciation forecast based on depreciation details in the asset master based on "what-if" scenarios		
43	Facilitate reclassification of assets and auto adjustment of depreciation		
44	Ability to track assets classified under intangibles and its amortization		
45	Capability for maintaining asset as per acts - MHRD		
VI	Asset Insurance		
46	Facility for asset Insurance . Automatic reminder for Asset insurance renewal and new policies		

ID	System Functionality - Student Information System- PGP	Bidder's Solution - Configuration(CO)/ Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
		Vendors	
I	**Student Information System General Admin**		
1	System should enable authorized user to set the short listing criteria for each program separately every year		
2	System should enable maker-checker rule for setting short listing criteria		
3	System should enable configuration of customized email text templates with place holders for applicant name, application number, academic year, program name etc.		
4	Facility to set application fees based on applicant type and program		
5	Facility to specify additional uploads required if any, in the uploads section of the online application		
6	Capability to specify which of the additional uploads are mandatory/optional		
7	Enable freezing of certain information related to applicants and keep some fields editable by applicant		
8	There should be separate admission portal for CAT and non CAT programs.PGP is throug CAT and all other programs are through non CAT. The admission process is defined in respective program.PGP-BL,accepts CAT,GMAT and GRE scores.		
9	There should be separate Student Self Service Portal for PGP ,PGP-BL, PGP-LSM, PGP -Finance EPGP , FPM , e FPM programs		
II	**Student Information System - Master**		
10.a	Ability to create student record once the applicant accepts his/her offer		
10.b	System should enable to view and update relevant information online according to IIMK rules (including address, telephone, email and parent / guardian information)		
11	Ability to store all student information electronically, including documents that are submitted at various stages of the student life cycle (e.g. warning letters, reports etc.) and include the ability to be able to add comments to stored documents as required		
12	Facility to maintain unlimited IDs, names, addresses, e-mail addresses, and phone numbers of students		
13	System should be able to maintain the national ID number of the student separately from the identification number, while making sure it is searchable by staff.		
14	System should be able to record information regarding disabilities, while making sure it is visible to staff		
15	Facility to record, maintain and provide a mechanism to report a variety of information on international students to meet the reporting requirements of the government		
16	Ability to record general student comments or person comments specific to a term / session		
17	Facility to enable searching a student by name, program, term, National ID or ID or phone		
18	System should enable capturing and maintaining an unlimited number of courses for students with status and effective dates captured for historical purposes		
19	Facility to record and maintain an unlimited number of user-defined student attributes and groupings on a per term / session basis		

20	Ability to Uploading of Student name, Student Signature, Father Signature, Mother Signature and photo of Student		
21	Mark sheet & Certificate of qualifications in digital form (Scanned Copy) at the time of Admission		
22	Ability to Enter Courses and Marks of all qualifications		
23			
24	System should be able to identify and report on various groups of students		
III	**Student Information System - Student Finance**		
25	System should maintain various fee heads and charge code types as per programs- Tuition fee, accommodation fee and other heads as per IIMK policy		
	Create and maintain Fine master ,approval		
	Ability to enter fees receipt entry details at the time of Admission		
	Ability to authorize bank to Debit the fee against Student Bank Account		
	Ability to draft entry for PGP/FPM/PGP-BL,PGP-LSM, PGP -Finance Fees		
26	Student payment facility should be there in student self service Portal in web and mobile. They should also be able to view and print their payment status		
27	System should be able to process payments (cash, cheque, online payment and electronic transfer of funds), produce a physical receipt, and record the receipt number as part of the payment information		
28	Student Payment system should be integrated with Payment gateway (presently BOB/SBI Pay U) , Debit card , credit card , internet banking etc		
29	Ability to pay other types of fees like library fee , book fee , penalties etc		
30	Facility to manage Bank loan details taken by student		
31	System should be able to define default values for the charge and payment type codes		
32	System should be able to specify whether the charge and payment type codes are term specific or not		
33	Facility to provide the ability for student fee assessment to automatically reflect in the student's account		
34	Ability to store student bank account information		
35	Facility to define the general ledger accounting distributions for each charge and payment type code.		
36	Facility to allow multiple general ledger accounting distributions for each charge and payment type code.		
37	System should be able to specify general ledger accounting distributions based on the revenue recognition model at IIMK		
38	Module should be able to interface from Student Housing, Loan, (anywhere where there may be an additional charge to be added to the students accounts)		
39	Ability to assign and calculate student installment plans based on defined rules		
40	Facility to specify the rules for posting transactions for charges and payments, application of payments, and for reversals.		
41	Ability to support both student and non-student accounts receivable activity and to be able to differentiate between the two.		
42	Ability to generate credit card listing and auto calculates merchant charges based on a pre-determined rate set up in the system.		
43	System should be able to apply a specific charge to a group of individuals with the detail code, date, and amount		
44	System should be able to maintain and apply various tuition rates consistent with business rules. The billing program must interface with the student registration module to generate accurate statements.		

45	Ability to verify that each transaction is entered by date, reference, amount, account number, and description for transfer to the General Ledger.		
46	Ability to handle Tax Accounting ,GST as per defined rules		
47	System should be able to apply a rebate for advance payment of registration / enrolment related fees (i.e. fees paid in advance for the full year and / or program), with rebates calculated as net of any other discounts / scholarships		
48	Facility to assess late fees		
49	System should enable other departments to add limited charges to the account (for example, Library staff should be allowed to add only library fines and Housing staff should be allowed to add only housing damage charges)		
50	Facility to define authorization rules that permit students to be exempt from specified charge		
51	ability to process multi-term payments covering past and future academic terms / sessions.		
52	Facility to produce a descriptive receipt, with the option of listing the student's term, program and charges		
53	Ability to support automatic receipt numbering and varying receipt sizes		
54	Ability to provide foreign currency conversion		
55	Should be able to record payments against an account		
56	Should be able to record miscellaneous cash receipts		
57	Should be able to issue an account refund as a cheque or direct deposit		
58	Facility to identify payment defaulters to enable administration to take necessary actions		
59	Facility to place and remove holds on an account either automatically or individually		
60	Ability to apply payments automatically based on rules defined for the payment and charge codes		
61	Facility to generate report on the transactions for all cashier		
62	Facility to generate report on the transactions for individual		
63	Facility to generate bill or targeted billing		
64	Ability to print appropriate messages on the bill		
65	Facility to include awarded scholarship credits and specify whether these credits affect the balance due when processing the bill		
66	Ability to specify the billing amounts in a Indian Currency for Indian Students and international currency for International students for PGP		
67	Facility to automatic generation of reminder letters for payment to be sent through SMS , email and display in Portal		
68	Facility to view and generate reports on total collections, total defaulters amounts, tax details, term wise collections, students number and attrition, student holds and defaulters		
69	Facility to view and generate reports like enrolments, fee collection course wise/month wise/ year wise, compensation for each participating faculty and coordinator for short term MDP		
70	Reports for reconciliation		
71	Reports on daily , monthly and semester collection statement		
IV	**Student Information System - Students Academic Record**		
72	Facility to maintain overall marks average as per credits defined for each student.		
73	Capability to record and maintain an unlimited number of courses for a particular academic term.		
74	ability to record an unlimited number of grade changes for a student enrolment.		

75	Capability to maintain detailed information, including title or pertinent comments, about an unlimited number of qualifying papers.		
76	Facility to maintain an unlimited number of academic events for a student (could include academic dishonesty tracking, medical deferrals etc.).		
77	Facility to maintain an unlimited number of degrees and certificates for a student.		
78	Maintain a historical record of past and current subjects		
V	**Student Information System - Support systems**		
A	**Faculty Credit Management System**		
79	Faculty gets credit for taking classes for ePGP ,PGP-BL,PGP-LSM, PGP - Finance, FPM, MDP , Research Published etc . As soon as the class is completed , research paper is published the data is to be updated by MDP , e PGP office and sent to Faulty , Area in charge for approvals . After approval the credit to be updated in Faculty Credit management system . This data to be available in Faculty self service portal , Deans and Directors Dash board		
B	**Accreditation Management system**		
80	This system will cater three to four different accreditation systems like AMBA, NIRF etc . The data to be captured from ERP and Data bank and the accreditation parameter to be computed and reported		
C	**Course Feedback Management system**		
81	This system will capture the course feedback through a Course appraisal forms and process this based on the rules defined by IIMK. The reports generated to be displayed to Faculty , deans and directors Dashboards		
VI	**Student Information System - Integration**		
82	SIS to be integrated to Library Management system , Faculty Course feedback system, Faculty credit management system , accreditation system, Learning Management System Moodle, Self Service Portal , Biometric Systems for students , Document Management system, email and SMS server		
VII	**Document Management system**		
83	Facility to store all the old question papers , quiz etc		
84	RTI History for 20 years		
85	old PGP hand books soft copy		
86	Visiting Faculty / Adjunct Faculty Data		
87	DPP Document		
88	Diploma formats		
89	Convocation data		
VIII	**Admin**		
90	Procurement of case studies , text books through system		
91	Approval for case studies , books through workflow		
92	Travel , Transport , Guest house, MDC booking through system		
93	Update credits in **Faculty credit management** system based on classes taken		
94	Participant applications like batch change , certificate for loan through workflow		
95	Work flow for New dues clearance for Students		
96	Facility for upload of course material		
97	Facility for reconciliation of PGP fees collection with Finance		
98	Facility for deduction of different types of Fines and fees waiver		
99	Workflow for Approval , travel booking , tour booking and honorarium payment of Guest and Adjunct faculty		
100	Facility for generating different types of bonafide certificates, verification letters , transcripts. There should be online workflow approval process for generating this and a log also		

ID	System Functionality - Student Information System- PGP	Bidder's Solution - Configuration(CO)/ Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**PGP - Admissions - Applications**		
1	System should enable the bulk creation of applications by uploading file of the applicants data of PGP from CAT / GMAT/GRE system. System should enable alpha-numeric application number format with desired prefix and suffix		
2	uploading file of the applicants data for some programs (i.e. PGP, FABM, FPM), System should enable alpha-numeric application number format with desired prefix and suffix		
3	System should enable sending communication to the registered email ID and registered mobile no		
4	System should enable capturing and consolidation of applicant's information from multiple sources. For PGP applicants data comes from testing agency and through online application for foreign applicants and NRIs		
5	System should enable capturing essential applicant information like :		
	Identification type and no		
	Date of birth		
	Educational background		
	Test scores (sectional and total score as well as sectional and total percentile		
	Achievements		
	All data from admissions		
	gender , category, etc		
	physically handicapped		
	Work experience		
	Affiliation / Company name / Self employed		
	Contact address / no / emailid		
	any other data as and when added by IIMK		
6	Ability to update specific fields like Degree Completion data / work experience by student		
7	Ability to use system generated, National ID, or other ID numbers for student identification.		
II	**PGP - Application Processing**		
8	Facility to generate area wise and general reports of the applications received for PGP		
9	System should enable multi-level short listing of applicants based on a set of criteria defined by IIMK for the programmes. Facility to upload policy criteria , candidates to upload their cetrtificates		
10	System to generate roll no /id no for test and interview		
11	System should enable the allocation of interview, writing ability test and Group discussion venues, slot and dates based on the capacity and preference selected by the candidates		
12	System should have facility to notify selected number of applicants by email SMS and by letter		
13	System should enable generation of attendance rosters of all applicants for interview and group discussion at all centers		

14	System should enable uploading of attendance and scores for the interview and group discussion in the system database using excel or manual entry for each student		
15	Enable corrections to academic scores and work experience duration based on verification of documents		
16	System should allow user to download applicants' complete data onto a spreadsheet and as PDF. The system should also allow to download the documents		
17	Enable authorized user to mark certain activities in system which are performed outside the system like verification of documents, fee received through DD etc. throughout the application process. Also facility for travel arrangements, venue and accommodation booking		
18	Facility for acceptance of fee payment,Facility for withdrawal of offer of acceptance, Upload withdrawal form, refund policy		
19	Reports - CAT Registration ID, Students registration data, withdrawal data, gender wise, category wise, agewise,statewise,qualification etc for BL-GMAT and GRE registration ID		
III	**PGP - Admission & Enrolment**		
20	Facility to upload data for selected students into the system		
21	Facility for selected students to submit consent, mandatory documents online ,upload physically signed and scanned forms online, remit fees through payment gateway. The fee payment to be integrated with Student Finance of ERP		
22	System should be able to manage applicant waitlist and process it in case admission is not taken by a selected applicant		
23	Facility to generate selection letters for the selected applicants		
24	System controls to ensure that applicant is admitted to a single program		
25	Enable generation of unique alpha-numeric student ID as per the format decided by IIMK PGP programme		
26	Facility to send mail to concerned sections like Library, IT , etc regarding the list of admissions . System should also have facility for support departments (Library, Hostel, publication etc.) to view and receive information related to newly admitted students		
27	Dashboards to be developed which helps user to view applicant's data as per program, category, gender, education background, experience and other criteria required		
28	Access to be provided for Student Self Service Portal , Wifi , electronic platform etc		
29	Ability to track stages of records (interviews, accepted, rejected, ...)		
30	Track admission categories collectively and separately by Programmes while providing specific information related to each category such as reserved category, gender, majors, geographical location, etc.		
31	Provide proficient mechanism for generating and tracking Admission Office letter series related to individual record status as well as various forms, materials, acknowledgements, etc.		
32	Provide opportunity to easily enter, review and update remarks including phone calls, interview data, etc.		
33	Provide opportunity for specific information to be accessible by applicants via the Web. For example, applicant admission status, missing file items, etc.		
34	Provide the ability to interface with CAT Biometric system		
35	Competent, specific mechanism for detecting, combining and/or removing duplicate records		
36	Provide reliable comparison and statistical data reports; for example, comparison of historical data over a specified number of years		

37	Provide mass entry capabilities for adding, dropping or swapping classes for a group of students to include population selection		
38	Ability to admission form processing for physically handicapped		
39	System should provide capability to set and remove holds on student records		
IV	**PGP - Preparatory Course / Orientation and Induction**		
40	Facility to Import data from flat/Excel files send by admissions		
41	Registration and document verification , collection and upload of original documents		
42	Search user for the debarred students		
43	Allow debarred students to attend course		
44	Allow the preparatory students to modify his details		
45	Removal / withdrawal of preparatory students		
46	Grouping of preparatory students		
47	Documents to be verified during Registration		
48	Reports - Gender wise , state wise, education wise, qualification wise, experience wise		
49	Facility for Semester Scheduling Facility for Orientation Schedule before registration		
50	Facility for Time slot creation		
51	Facility for Courses creation		
52	Time table generation for selected semester		
53	Attendances of preparatory students		
54	Allocation of grades to preparatory student		
55	Ranking of preparatory students		
56	General template generation for letters		
V	**PGP - Student Record**		
57	Ability to create multiple sections by course First year Compulsory Courses - for all sections. Sections are selected based on certain criteria's. Facility to determine different criteria in the system Second year electives - based on electives bidding and compulsory courses For PGP-BL course is only 1 year -5terms.		
58	Generate room assignments using room types/preferences and course data. Allow for operator intervention to adjust automatic assignments		
59	Allow students to check the availability of course sections by searching for courses alphabetically, by subject, day and time, instructor, schedule type and attribute		
60	Provide opportunity for course limit capability for different type of students and manual override capability for master users		
61	Facility for students to view and update relevant information online according to IIMK rules (including address, telephone, email and parent / guardian information)		
62	Database to store all student information electronically, including documents that are submitted at various stages of the student life cycle (e.g. warning letters, reports etc.) grade cards and include the ability to be able to add comments to stored documents as required		
63	Database to maintain unlimited IDs, national ID, names, addresses, e-mail addresses, and phone numbers of students		
64	Ability to associate medical and special equipment needs to a person		
65	Ability to record information regarding disabilities, while making sure it is visible to staff		

66	Facility to record general student comments or person comments specific to a term / session		
67	Facility for searching a student by name, program, term, National ID or ID or phone ,location, category - male /female etc		
68	System should have the capability to record and maintain an unlimited number of user-defined student attributes and groupings on a per term / session basis		
VI	**PGP - Attendance**		
69	Facility to generate class rosters for manual marking of attendance		
70	System should be able to capture student attendance		
71	Facility for faculty/Associate to upload attendance through use of excel files		
72	Workflow to enable students to apply for all types of leave including medical leave and submit relevant proofs online. Facility for approval form competent authority Workflow for approval of attendance waiver		
73	Capability to record leave of absence information for all students		
74	Facility for Students to view their attendance , leaves online form the PGP Students self service portal		
75	Facility to generate reports on the percentage of attendance for specific term for specific course for PGP Facility for downgrading based on attendance		
76	Facility to generate alert to faculty for absenteeism / low attendance record of students warning letters to students based on absenteeism / attendance records		
77	Biometric Attendance for students		
VII	**PGP - Course & Catalogue Management**		
78	Ability to create and manage master course catalog		
79	Maintain separate course information for all terms.		
80	Maintain large amount of data and data types on individual courses (day/time, instructor, limit, unlimited prerequisites/co-requisites, other enrollment restrictions, room, exam required, grade type, tuition, etc.)		
81	Ability to create multiple sections per course		
82	Flexibility to provision for multiple day/time/room per section.		
83	Flexibility to provide variable start/end dates per course.		
84	Ability to build new course/schedule based on old one.		
85	Generate room assignments using room types/preferences and coursedata. Allow for operator intervention to adjust automatic assignments.		
86	Ability to enter and maintain class syllabus		
87	Ability to change course timetable after generation		
VIII	**PGP - Course Management**		
88	Faculty for addition of new program and course and classify of the newly added courses as core or electives		
89	Facility to enable Lecture-Case-Quiz break up of courses to be changed as on need basis		
90	Facility for few courses to be activated/deactivated as on need basis		
91	Facility to enable creating and maintaining program requirements for all programs including current requirement		
92	System should enable defining the courses including full course structure information as per course calendar. This should include data such as course title, course outline, course credit, grade mode, capacity and any other IIMK specific information etc.		

93	Ensure that module objectives / learning objectives and the assessment of each module is mapped to the program objective to facilitate a determination of whether or not students have attained all requirements.		
94	Provide the ability to define specific course offerings for a term		
95	Work flow for faculty to request for addition of new course through online workflow. Facility for tracking of course addition request		
96	System should have the capability to check whether the evaluation criteria is met or not. Facility to update the evaluation criteria to be there in the system		
97	Facility to enable assigning a course code to the appropriate course		
98	System should enable identifying courses by category (e.g. compulsory, elective courses etc.)		
99	System should enable maintaining start and end sessions for each course		
100	Facility to maintain historical information about a course		
IX	**PGP - Course Registration**		
101	Batch processing from web based course registration of students.		
102	Auto-registration to predefined standard term-courses, but online registration for electives and other courses		
103	System should be able to register students automatically into predefined set of core courses as per the program		
104	Group allotment based on qualification/stream/college/experience		
105	Live Web-based drop/add with secure/password-protected access.		
106	on line web based application linked to elective bidding for electives		
107	User-defined prerequisite/co-requisite capability.		
108	System should be able to provide facility in self service portal which allows students to register only for courses which meet the requirements of their programs		
109	Prerequisite/co-requisite checking and manual override capability for master users.		
110	System should be able to identify study plans for students for a session / term based on their program		
111	Ability to view real-time enrolment counts for a course section by staff and Faculty		
112	Facility to enable staff to generate student schedules and bills at point of registration		
113	Time conflict checking and manual override capability for master users.		
114	Ability to search for available courses according to selected criteria (day/time, instructor, courses with available seats, etc.).		
115	Ability to see entire student schedule with appropriate fields (room, instructor, day/time, etc.)		
116	Printable student schedule , class list and student rosters		
117	Set grade types (audit, pass/fail).		
118	On-demand registration reports in real time.		
119	Flexibility in repeat course recalculation logic.		
120	Ability to place and remove registration holds.		
121	System should be able to indicate when the student is repeating a course at point of registration and have the system prevent registration if the maximum number of repeats has been reached.		
122	System should be able to indicate when the student is repeating		
123	Facility to enable staff to identify sections of a course that are open and do not conflict with a student's current schedule		
124	Ability to provide for customization of registration processing messages that students receive when registering online		

125	Ability to provide mass entry capabilities for adding, dropping or swapping classes for a group of students to include population selection, user defined error checking, de- selection of individual students be updates and audit capabilities		
126	System should be able to mass drop students from a specific section without having to access each student's registration individually		
127	System should be able to auto-drop (cancel the registration) for students who have registered but failed to make appropriate arrangements for payment.		
128	Facility to provide a mechanism to automatically drop students from all registered classes for a session / term when they defer or withdraw.		
129	Facility to enable staff to perform add/drop functions based on effective-dated rules, with ability to override errors		
130	Ability to prevent certain students from being able to drop classes online		
131	System should be able to restrict a student from dropping below a minimum number of registration credits once the minimum number of credits has been reached		
132	System should be able to verify that instructor approval, and other prerequisites have been met		
133	Facility to report student enrolment information based on user defined parameters as required for ministry Facility for Term wise reports on Registration		
X	**PGP - Course Scheduling**		
134	Ability to create master course catalog		
135	Ability to enter and maintain class syllabus		
136	Ability to change course timetable after generation		
137	Ability to change faculty class assignment during the term without affecting other classes		
138	Ability to substitute Faculty during the term		
139	Ability to transfer faculty from one set of classes to another		
140	Ability to create Slotting Pattern or Changes the Existing Slotting Pattern		
141	Ability for the faculty Section Creation for each Course after Registration of the course		
142	Ability to group creation for tutorial and practical after Registration of the course		
143	Ability to allocate rooms for lecture sections on the basis of Size and Facilities		
144	• Ability to allocate room for tutorial groups on the basis of Size and Facilities		
145	Ability to allocate computer lab for Practical Groups on the basis of Size		
146	Ability to allocate faculty for Sections and Groups		
XI	**PGP - Elective Course Registration and course bidding**		
147	Enable students to bid for the elective courses through PGP self-service portal within the set timeframe		
148	Able to assign elective courses to students as per the logic set by the IIMK for course allocation . This is done elective bidding system application		
149	System should be able to indicate the shortage and excess of credits as per IIMK policy		
150	Enable staff to identify various types of conflicts during registering elective courses of students		
151	Ability to calculate and assign bidding points to students based on the criteria set by IIMK like academic performance etc.		
152	System should be able to ensure the minimum and maximum credit limit during course bidding		

153	Facility to generate report of courses which failed to achieve minimum limit of students		
154	Facility to provide for automated notifications in cases of waitlist whenever seat(s) become available		
155	Ability to provide waitlist status and position display in Self Service Portal		
156	System should be able to restrict registration in a section to only those students within a specific class, degree subject, level, program, field of study, department, attribute, cohort, campus, degree etc. as per the IIMK requirement.		
157	Facility to indicate when the student is registered for courses with conflicting schedules		
158	Ability to indicate short and excess credits during registration as per the IIMK policy		
159	System should be able to check for linked courses during add and drop processing		
160	System should be able to restrict a course to only those students who have obtained a minimum score on assessment or other tests, or have met course prerequisites, or who have met a combination of test scores and course prerequisites.		
XII	**PGP - Calendar Scheduling**		
161	Ability to enter list of Holidays for the Year		
162	Ability to define tasks and Activities within that task		
163	Ability to define rules for each Task for Calculating the Actual date for that Task		
164	Ability to creating **PGP Schedule** and detailed **Academic calendar** for the coming Year		
165	Ability to approval of PGP Schedule by PGP Committee		
166	Ability to approval of PGP Schedule		
167	Ability to grant exceptional power of Chairman PGP to modify semester schedule		
168	Ability for auto-start of activities (like registration, grading etc) Scheduled for the entire semester/year		
XIII	**PGP - Assessment - General**		
169	System should be able to define the grades/marks permitted with in a specific grading mode and the effect of each grade on credit hours attempted, earned and completed, and grade point average.		
170	System should be able to provide an electronic grade book with ability to define grading scales, graded components, their weight age.		
171	System should be able to set the grade submission window for various programs		
XIV	**PGP - Assessment - Exam Management**		
172	**Program / application for scheduling exams**, including re-sits, clashes and common courses , assigning rooms and invigilators.		
173	System should be able to create exam schedule reports based on user defined parameters.		
174	Provide the capability to distinguish among regular re-sits and repeats.		
XV	**PGP - Assessment - Assessment / Grading**		
175	Should provide a self-service grade book for faculty and academic associates to enter marks		
176	Provide maker-checker facility for entering marks and approval by respective Faculty		

177	Facility for Faculty and associate to take class rosters and grade reports		
178	Ability to produce grade sheets for a parameter- supplied term, sub-term, range of dates, or specific section.		
179	Ability to process partially maintained grades for various quiz, test etc		
180	Able to automatically notify relevant faculty when the submission dates for their courses are forthcoming through email , sms and portal		
181	Facility to ensure that students who withdraw or don't continue with a class are charged relevant tuition fees and are assigned a grade which does not impact class grade average		
XVI	**PGP - Assessment - Grade Processing**		
182	Facility to define IIMK rules and regulations for level or term Progressions		
183	Provide the ability to schedule course sessions and exams using predefined attributes and setup (faculty availability, room type preferences, …)		
184	Provide the ability to see class lists and student rosters		
185	Ability to create multiple user-defined grading schemes		
186	Enable programmes administrators to enter parameters and respective weightages for final grades calculation for each course of the programmes separately		
187	Facility for faculty / Academic associate / staff to enter/upload marks for students, however the final grades should be visible to students after final progression and approval		
188	System should restrict grade change post final grades calculation		
189	Facility to display audit trails showing course, grade option, grade, or credits changes made to a student's academic record in such a way that students see only the latest grades / marks for each course (i.e. when a grade change is done, students see the later grade not the grade which was changed)		
190	Log of all grade changes made to a student's academic history records should be kept in the system		
191	Ability to calculate the academic standing of a student, including eligibility for any honors , 1st class etc		
XV	**PGP - Assessment - Grade assessment**		
192	Facility to define rules and regulations for level or term Progressions		
193	Facility for programmes administrators to enter parameters and respective weightages for final grades calculation for each course of the programmes separately		
194	Facility for faculty and academic associate to enter/upload marks for students, however the final grades should be visible to students after final progression/decisions are applied		
195	System should restrict grade change post final grades calculation		
196	Facility to generate audit trails showing course, grade option, grade, or credits changes made to a student's academic record in such a way that students see only the latest grades / marks for each course (i.e. when a grade change is done, students see the later grade not the grade which was changed)		
197	All grade changes made to a student's academic history records should be logged in the system		
198	Capability to calculate the academic standing of a student, including eligibility for any honors , rank , first class		
XVI	**PGP - Assessment - Grade Processing General**		
199	Ability for faculty to enter grades online with instructor verification, plus real-time administrative entry/edit capability.		

200	Provide the ability to see class lists and student rosters		
201	Ability to create multiple user-defined grading schemes		
202	Ability for faculty to enter grades online with instructor verification, plus real-time administrative entry/edit capability.		
203	CGPA/SGPA Calculation		
204	Ability to record midterm and final grades		
205	Ability to provide Grade lists and grade reports		
206	Ability to generate list of outstanding (not received) grades		
207	Ability to update transcript automatically upon grade entry		
208	Ability to calculate class rank at the end of each term		
209	Ability to present graphically students performance		
210	Generate grade distribution and section analysis reports.		
211	Ability to produce degree audits to analyze student performance		
212	Live grade change ability		
213	Enable generation of grade mailers to multiple addresses per student.		
214	Ability to convert automatically grades of "incomplete" to "fail".		
215	Ability to add extract faculty load based on IIMK business rules		
216	Ability to designate transfer courses as equivalent to IIMK courses.		
217	Ability to designate transfer courses as satisfying certain requirements (waiver)		
218	Maintain transfer equivalencies		
219	Ability to generating faculty specific evaluation sheet with different components		
220	Ability to Entering Marks for all Evaluation Components		
221	Ability to Major Area Marks		
222	Ability to Histogram Generation and Allocation of Grade		
223	Ability to Moderation of Grades by Faculty Board		
224	Ability to Verification and finalization of grades by Chairman		
225	Process to view Grade Card of student		
226	Process to add components for generation of Report		
227	Ability to approving to award Grade by Chairman PGP		
228	Ability to Approval for Awarding Grade by PGP Committee		
229	Facility for students to view their grades online in Students self Service Portal. Faculty and Concerned staff also to have the facility for viewing		
230	System should be able to display a student's record in chronological or subject order		
231	Ability to produce a revised grade report for a student after term grades are reported		
232	Facility for preventing students with relevant holds from viewing their grades, requesting transcripts etc.		
233	Capability to provide statistical reports by individual student, by class, which includes user defined parameters such as range individual student, by class, which includes user defined parameters such as range of marks/grades, statistical analysis (i.e. means etc.). This report to be available to Academic chairs , Deans and Directors		

234	Ability to provide a statistical report on grade average for each class, ensuring that this does not include specific grades (for example, Failed through Dishonesty, Withdrawn for Non-Attendance etc.). This report to be available to Academic chairs , Deans and Directors		
235	Facility to define repeat events and actions		
236	Ability to flag all student records that are under repeats		
237	Facility for students to request an official transcript online through their self service portal		
238	Facility to display detailed information for each student, about transcripts requested, pending or produced, online.		
239	System should be able to maintain a record of requested and printed transcripts, along with information regarding users		
240	System should be able to provide for a variety of transcript types and content, including the ability to include / not include GPA / CGPA as well as Average / Cumulative Average calculations as appropriate, and to include component grades along with overall grade / mark for a course.		
241	Ability to automatically add transcript related charges to a student account for transcript requests.		
242	Capability to define official and unofficial transcripts with varying content by type of transcript and program.		
243	Able to give different transcripts an alternative name (i.e. Certification of Results).		
244	System should be able to flag repeated courses for display on a transcript.		
245	System should be able to display completed/awarded programs on a transcript and include classification of award.		
246	System should be able to include information regarding earned hours, exempted hours and total program credit hours on the transcript.		
247	System should be able to include grading legend by program and by course.		
248	Facility include an automated but updateable signature block on the official transcript.		
249	Ability to prevent ungraded courses from showing on the transcript.		
250	Facility to print courses and grades in a list without term information.		
251	Capability to track non-course requirements and print them on the transcript.		
XVII	**PGP - Assessment - Graduation Management**		
252	Ability to set configurable IIMK rules needed for graduations.		
253	Facility to produce a list of students potentially eligible for graduation for a term		
254	Ability to provide a mechanism to readily determine whether or not students have met program requirements and are eligible for ePGP		
255	Enable students to pay convocation fees through PGP self-service Portal		
256	Ability to creating pre-Diploma warning system to students		
257	Process to Generate of List of Graduating Student		
258	Ability to Finalization of Graduation list		
259	Ability to Approval of graduation list by PGP Committee		
260	Ability to Approval of finalized Graduation list of Students by Chairman PGP		
261	Facility to schedule graduation ceremonies and maintain information on attendance and also manage student guests.		

262	Ability to automatically inactivate the student record after convocation for graduating students and for students who have completed their programs		
263	Facility for reports in hard copy and soft copy to the Alumni Office regarding graduated students, in a format specified by the Alumni Office. This data is to be updated in Alumni data base		
XVIII	**PGP - Assessment - Degree audit**		
264	Provision to revise the standard requirements for ePGP		
265	Ability to define non-course requirements for the program of study		
266	System should be able to consolidate degree program attributes as identified in catalogue and/or schedule. Attributes may be used to identify how a course may be used to satisfy degree requirements.		
267	Facility to report the course and non-course requirements a student has completed or not completed.		
268	ability to identify courses students have completed which don't contribute to their program requirements		
269	System should be able to waive course requirements, credit requirements, or non-course requirements (e.g. extra-curricular activities etc.).		
270	Ability to perform degree audit compliance for a student and be able to review the results immediately.		
271	Ability to define the classification of the awarding program like 1st class		
XIX	**PGP - Internship / Project**		
272	System to have the capability to define and maintain non-academic credit courses separately from the academic record		
273	Facility to track student's performance in non- academic courses like internship or project through comments, notes from faculty or industry sponsors		
274	Facility to track student internships details, report submission and marks/grades		
275	Selected data of internship to be displayed in respective student self service portal		
276	Various reports / Views on internship like company wise , area wise , stipend wise etc to be available		
277	Access to Internship data for Faculty , PGP office and in dash boards of Dean and directors		
XX	**PGP - International Exchange Program**		
278	System to have the data base of IIMKs Partnering Institutes		
279	Facility to handle student transfers / students going for international program from IIMK to other partnering institute and make changes in the student account respectively as per predefined rules of IIMK		
280	Facility to create student record with separate id and manage the information of incoming students from partnering institutions. They have to be provided access facility like PGP students for their courses and also to student self-service Portal and facilities		
281	The facility like course registration , assessment , grade etc should be available to International students also.		
282	System should be able to capture the course details and credits from international institute for the students gone to partnering institute from IIMK		
283	Reports on Institute wise students etc to be available		
284	The data to be available for PGP office , international Relations office , Faculty , Dean and directors Dashboards		
XXI	**PGP - Scholarship**		
285	Facility to create and maintain scholarships and other financial awards		
286	Maintain rules and approval mechanisms for continuing eligibility		

287	Facility for students to apply online for scholarships and attach supporting documents and also to track the status of their applications		
288	Manage funding sources and awards		
289	Facility for automatically update scholarship eligibility accordingly based on students meeting the academic requirements		
290	Facility to mass update the awarding process and update student accounts.		
291	Facility to automatically calculate the amount of scholarship to be disbursed to students from each program, make payment, and post to appropriate scholarship ledger. The scholarship system to be linked to **Student finance** and the data to be displayed to relevant student in Student Self service portal.		
292	Facility to generate report on student scholarship with amounts, and date of disbursement, with the option of viewing history by term .		
XXII	**PGP - Placement**		
292	Facility to capture recruiters data year wise , industry wise , area wise , number of students recruited etc		
293	Facility to capture and display Placement history data		
294	MIS and Reports on placements to be available on Faculty , Deans and Director's Dash board		
XXIII	**PGP - Housing / Hostel**		
295	System should be have database information on Hostels and rooms used for housing and assign specific attributes to these rooms (such as ground floor, wheelchair access, guest rooms		
296	Application / program to assign rooms to students as per rules set in the system. Facility for manual update with authorisations		
297	ability to control the number of assignments made to a room so that room capacities are enforced.		
298	System should be able to reserve housing for specified groups / students		
299	Facility to inactivate a room or building and restrict assignment		
300	Ability to generate and send announcements to residents, including by email.		
301	Facility to automatically generate relevant charges to the student account, based on a variety of rates and stays, for example, daily, weekly, monthly and session charges		
302	Facility to generate various housing related charges such as damage items, administration fee on room changing, cleanliness, key lost, and other miscellaneous fines		
303	Provide a variety of reports to facilitate housing management, including: Occupancy, availability, special Reservations, Bookings, Check In - Check Out, Payment Related, Revenue etc.		
304	Facility to generate MIS reports like current tenants in hostels, list of residents program wise , hostel wise, year wise		
305	System should be able to support payment of Electricity , AC , Geyser etc in Students Self service portal		
XXIV	**PGP - Disciplinary Activities**		
306	Facility to create to log complaint against student		
307	Facility to manage Disciplinary action data base		
308	Facility to record enquiry of committee		
309	Facility to update Punishment		
310	Generate Mis Reports		
XXV	**PGP - General - Change Course coordinator**		
311	Ability to manage the change of Course Coordinator		
312	Ability to manage the approval of request for Change of Course Coordinator by Area Chairman		
XXVI	**PGP - General - Course offering by Faculty**		

313	Ability to Offer Courses in different Slots for each Semester		
314	Ability to offer Course approval		
315	Ability to approval Course offering		
316	Ability to approval of Course offering by Chairman PGP		
317	Adjunct/Visiting faculty management		

XXVII PGP - General - Course dropping by student

318	Ability to allow PGP students to drop Courses		
319	Ability to approval Course dropping requests		
320	Ability to approve the course dropping by the PGP chairman		

XXVIII PGP - General - Term / Year Withdrawal by students

321	Ability to apply with Supporting Evidences for Semester Withdrawal		
322	Ability to get a recommendation by Chairman PGP for Semester Withdrawal		
323	Ability to Approve the application for semester withdrawal by Chairman PGP		
324	Ability to enter the Notification Number and Date of Application		
325	Ability to capture attendance through data entry system		
326	Capability to interface with a desirable biometric device for attendance		

XXIX   PGP - Program office

327	Ability to issue Books/Polycopies to the students		
	Ability to take back the issued Books/Polycopies o Book Distribution System – Non Returnable o Book Distribution System – Returnable o Book Distribution System – Sharable o Xerox billing facility with different size of papers o Xerox billing facility to different departments o Different types of spiral binding for different users o Expenses related to books & study material		

XXX   PGP - Awards

328	Ability to define awards, rules and formula for receiving that award		
329	Ability to create award committee for each award		
330	Ability to identify Students for each award		
331	Ability to approve final list to Chairman PGP		
332	Manage the Process of approval of the list of student receiving the award by - work flow		

XXXI   PGP - Course feedback system

333	Facility for students to update the Faculty feedback for the course		
334	Facility for staff for checking and reviewing the data		
335	Facility for PGP chair to approve and publish the feedback		
336	The result to be available on dashboards and self service portals		

XXXII PGP - Course allocation Report

337	Facility for area chairs to view the course allocation of PGP courses		

XXXII PGP - General

338	Purchase of books, case study and other study and office material for PGP		
339	work flow for budget and purchase approvals		
340	**Facility to scan and store answer papers in Documents management system**		
341	Facility for allocation of staff and staff management		

ID	System Functionality - Student Information System - ePGP Kochi	Bidder's Solution - Configuration(CO)/ Customization(CU)/ Application Development(AD)/ Third Party solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Student Information System General Admin**		
1	System should enable authorized user to set the shortlisting criteria for each program separately every year		
2	System should enable maker-checker rule for setting shortlisting criteria		
3	System should enable configuration of customized email text templates with place holders for applicant name, application number, academic year, program name etc.		
4	Facility to set application fees based on applicant type and program		
5	Facility to specify additional uploads required if any, in the uploads section of the online application		
6	Capability to specify which of the additional uploads are mandatory / optional		
7	Enable freezing of certain information related to applicants and keep some fields editable by applicant		
8	There should be separate admission portal for CAT and non CAT programs like E PGP , FPM , eFPM etc. the admission process is defined in the		
9	There should be separate Student Self Service Portal for PGP , EPGP , FPM , e FPM programs		
II	**Student Information System - Student Record**		
10	System should enable to view and update relevant information online according to IIMK rules (including address, telephone, email and parent / guardian information)		
11	Ability to store all student information electronically, including documents that are submitted at various stages of the student life cycle (e.g. warning letters, reports etc.) and include the ability to be able to add comments to stored documents as required		
12	Facility to maintain unlimited IDs, names, addresses, e-mail addresses, and phone numbers of students		
13	System should be able to maintain the national ID number of the student separately from the identification number, while making sure it is searchable by staff.		
14	System should be able to record information regarding disabilities, while making sure it is visible to staff		
15	Facility to record, maintain and provide a mechanism to report a variety of information on international students to meet the reporting requirements of the government		
16	Ability to record general student comments or person comments specific to a term / session		
17	Facility to enable searching a student by name, program, term, National ID or ID or phone		
18	System should enable capturing and maintaining an unlimited number of courses for students with status and effective dates captured for historical purposes		
19	Facility to record and maintain an unlimited number of user-defined student attributes and groupings on a per term / session basis		
20	System should be able to identify and report on various groups of students		
III	**Student Information System - Student Finance**		

21	System should maintain various fee heads and charge code types as per programs- Tuition fee, accommodation fee and other heads as per IIMK policy		
22	Student payment facility should be there in student self service Portal in web and mobile. They should also be able to view and print their payment status		
23	System should be able to process payments (cash, cherub, online payment and electronic transfer of funds), produce a physical receipt, and record the receipt number as part of the payment information		
24	Student Payment system should be integrated with Payment gateway (presently BOB/SBI Pay U) , Debit card , credit card , internet banking etc		
25	Ability to pay other types of fees like library fee , book fee , penalties etc		
26	Facility to manage Bank loan details taken by student		
27	System should be able to define default values for the charge and payment type codes		
28	System should be able to specify whether the charge and payment type codes are term specific or not		
29	Facility to provide the ability for student fee assessment to automatically reflect in the student's account		
30	Ability to store student bank account information		
31	Facility to define the general ledger accounting distributions for each charge and payment type code.		
32	Facility to allow multiple general ledger accounting distributions for each charge and payment type code.		
33	System should be able to specify general ledger accounting distributions based on the revenue recognition model at IIMK		
34	Facility to specify the rules for posting transactions for charges and payments, application of payments, and for reversals.		
35	Ability to support both student and non-student accounts receivable activity and to be able to differentiate between the two.		
36	Ability to generate credit card listing and auto calculates merchant charges based on a pre-determined rate set up in the system.		
37	System should be able to apply a specific charge to a group of individuals with the detail code, date, and amount		
38	System should be able to maintain and apply various tuition rates consistent with business rules. The billing program must interface with the student registration module to generate accurate statements.		
39	Ability to verify that each transaction is entered by date, reference, amount, account number, and description for transfer to the General Ledger.		
40	Ability to handle Tax Accounting ,GST as per defined rules		
41	System should be able to apply a rebate for advance payment of registration / enrolment related fees (i.e. fees paid in advance for the full year and / or program), with rebates calculated as net of any other discounts / scholarships		
42	Facility to assess late fees		
43	System should enable other departments to add limited charges to the account (for example, Library staff should be allowed to add only library fines and Housing staff should be allowed to add only housing damage charges)		
44	Facility to define authorization rules that permit students to be exempt from specified charge		
45	ability to process multi-term payments covering past and future academic terms / sessions.		
46	Facility to produce a descriptive receipt, with the option of listing the student's term, program and charges		
47	Ability to support automatic receipt numbering and varying receipt sizes		

48	Ability to provide foreign currency conversion		
49	Should be able to record payments against an account		
50	Should be able to record miscellaneous cash receipts		
51	Should be able to issue an account refund as a cheque or direct deposit		
52	Facility to identify payment defaulters to enable administration to take necessary actions		
53	Facility to place and remove holds on an account either automatically or individually		
54	Ability to apply payments automatically based on rules defined for the payment and charge codes		
55	Facility to generate report on the transactions for all cashier		
56	Facility to generate report on the transactions for individual		
57	Facility to generate bill or targeted billing		
58	Ability to print appropriate messages on the bill		
59	Facility to include awarded scholarship credits and specify whether these credits affect the balance due when processing the bill		
60	Ability to specify the billing amounts in a Indian Currency for Indian Students and international currency for International students for PGP		
61	Facility to automatic generation of reminder letters for payment to be sent through SMS , email and display in Portal		
62	Facility to view and generate reports on total collections, total defaulters amounts, tax details, term wise collections, students number and attrition, student holds and defaulters		
63	Facility to view and generate reports like enrolments, fee collection course wise/month wise/ year wise, compensation for each participating faculty and coordinator for short term MDP		
64	Reports for reconciliation		
65	Reports on daily , monthly and semester collection statement		
IV	**Student Information System - Students Academic Record**		
66	Facility to maintain overall marks average as per credits defined for each student.		
67	Capability to record and maintain an unlimited number of courses for a particular academic term.		
68	ability to record an unlimited number of grade changes for a student enrolment.		
69	Capability to maintain detailed information, including title or pertinent comments, about an unlimited number of qualifying papers.		
70	Facility to maintain an unlimited number of academic events for a student (could include academic dishonesty tracking, medical deferrals etc.).		
71	Facility to maintain an unlimited number of degrees and certificates for a student.		
72	Maintain a historical record of past and current subjects		
V	**Student Information System - Support systems**		
V-a	**Faculty Credit Management System**		
73	Faculty gets credit for taking classes for ePGP , FPM, MDP , Research Published etc . As soon as the class is completed , research paper is published the data is to be updated by MDP , e PGP office and sent to Faulty , Area in charge for approvals . After approval the credit to be updated in Faculty Credit management system . This data to be available in Faculty self service portal , Deans and Directors Dash board		
V-b	**Accreditation Management system**		
74	This system will cater three to four different accreditation systems . The data to be captured from ERP and Data bank and the accreditation parameter to be computed and reported		
VI	**Student Information System - Integration**		

75	SIS to be integrated to Library Management system , Learning Management System Moodle, Self Service Portal , Biometric Systems		
	Admin		
76	Procurement of case studies , text books through system		
77	Approval for case studies , books through workflow		
78	Travel , Transport , Guest house, MDC booking through system		
79	Update in faculty credit management system based on classes taken		
80	Participant applications like batch change , certificate for loan through workflow		
81	Work flow for New dues clearance for Students		

ID	System Functionality - Student Information System - ePGP Kochi	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**ePGP - Admissions - on line Application**		
1	A portal for online application for students to apply. This System should enable applicants to apply for admission online as per the programs guidelines		
2	uploading file of the applicants data for some programs (i.e. PGP, FABM, FPM), System should enable alpha-numeric application number format with desired prefix and suffix		
3	System should enable sending communication to the registered email ID		
4	System should enable capturing essential applicant information like :		
	Identification type and no		
	Date of birth		
	Educational background		
	Test scores		
	Achievements		
	Work experience		
	Affiliation / Company name / Self employed		
	Contact address / no / emailid		
	Any other data as and when added by IIMK		
5	Facility for applicants to upload photo and supporting documents in the appropriate sections, with a facility for the applicant to delete and re-upload any document		
6	Facility to enable the applicant to submit the applicable fee via a payment Gateway / credit card / debit card / etc		
7	Have facility to allow the applicant to review the application in PDF format before submission		
8	System should restrict the application submission within the start and end date as set by an authorized user of the respective programme		
9	After Submission the system should restrict the applicant to view the application in read mode only		
10	Ability to use system generated, National ID, or other ID numbers for student identification.		
II	**ePGP - Application Processing**		
11	Facility to generate course wise reports of the applications received for eplatform e PGP and ePGP Kochi		
12	System should enable multi-level shortlisting of applicants based on a set of criteria defined by IIMK for the programmes		
13	System to generate eMAT Roll no for test and interview		
14	System should enable the allocation of eMAT Test / interview/Group discussion venues, slot and dates based on the capacity and preference selected by the candidates		
15	System should have facility to notify selected number of applicants by email and by letter for eMAT		
16	System should enable generation of attendance rosters of all applicants for eMAT at a particular center		

17	System should enable uploading of attendance and scores for the eMAT test/ interview/group discussion in the system database using excel or manual entry for each student		
18	Enable corrections to academic scores and work experience duration based on verification of documents		
19	System should allow user to download applicants' complete data onto a spreadsheet and as PDF. The system should also allow to download the documents		
20	Enable authorized user to mark certain activities in system which are performed outside the system like verification of documents, fee received through DD etc. throughout the application process		
III	**ePGP - Admission & Enrolment**		
21	Facility to upload data for selected students into the system		
22	Facility for e selected students to submit consent, mandatory documents online ,upload physically signed and scanned forms online, remit fees through payment gateway. The fee payment to be integrated with Student Finance of ERP		
23	System should be able to manage applicant waitlist and process it in case admission is not taken by a selected applicant		
24	Facility to generate selection letters for the selected applicants		
25	System controls to ensure that applicant is admitted to a single program		
26	Enable generation of unique alpha-numeric student ID as per the format decided by IIMK ePGP programme		
27	Facility to send mail to concerned sections like Library, IT , etc regarding the list of admissions . System should also have facility for support departments (Library, Hostel, publication etc.) to view and receive information related to newly admitted students		
28	Dashboards to be developed which helps user to view applicant's data as per program, category, gender, education background, experience and other criteria required		
29	Access to be provided for Student Self Service Portal , Wifi , electronic platform etc		
IV	**ePGP - Student Master**		
30	Facility for students to view and update relevant information online according to IIMK rules (including address, telephone, email and parent / guardian information)		
31	Database to store all student information electronically, including documents that are submitted at various stages of the student life cycle (e.g. warning letters, reports etc.) and include the ability to be able to add comments to stored documents as required		
32	Database to maintain unlimited IDs, national ID, names, addresses, e-mail addresses, and phone numbers of students		
33	Ability to associate medical and special equipment needs to a person		
34	Ability to record information regarding disabilities, while making sure it is visible to staff		
35	Facility to record general student comments or person comments specific to a term / session		
36	Facility for searching a student by name, program, term, National ID or ID or phone ,location, category - male /female etc		
37	System should have the capability to record and maintain an unlimited number of user-defined student attributes and groupings on a per term / session basis		
V	**ePGP - Attendance**		
38	Facility to upload attendance data from e platform service provider for ePGP online students		
39	Facility for faculty/Associate to upload attendance through use of excel files for ePGP Kochi		

40	Workflow to enable students to apply for leave and submit relevant proofs online. Facility for approval form competent authority		
41	Capability to record leave of absence information for all students		
42	Facility for Students to view their attendance , leaves online form the E PGP Students self service portal		
43	Facility to generate reports on the percentage of attendance for specific term for specific course for ePGP Kochi and E PGP online course		
44	Facility to generate alert to faculty for absenteeism / low attendance record of students warning letters to students based on absenteeism / attendance records		
45	Biometric Attendance for students to be integrated in future		
VI	**ePGP - Course Management**		
46	Facility for addition of new program and course and classify of the newly added courses as core or electives		
47	Facility to enable Lecture-Case-Quiz break up of courses to be changed as on need basis		
48	Facility for few courses to be activated/deactivated as on need basis		
49	Facility to enable creating and maintaining program requirements for all programs including current requirement		
50	System should enable defining the courses including full course structure information as per course calendar. This should include data such as course title, Instructor name, course outline, course credit, grade mode, capacity and any other IIMK specific information etc.		
51	Ensure that module objectives / learning objectives and the assessment of each module is mapped to the program objective to facilitate a determination of whether or not students have attained all requirements.		
52	Provide the ability to define specific course offerings for a term		
53	Work flow for faculty to request for addition of new course through online workflow		
54	Enable tracking of course addition request		
55	Facility to enable assigning a course code to the appropriate course		
56	System should enable identifying courses by category (e.g. compulsory, elective courses etc.)		
57	System should enable maintaining start and end sessions for each course		
58	Facility to maintain historical information about a course		
VII	**ePGP - Course Registration**		
59	Batch processing from web based course registration of students.		
60	Auto-registration to predefined standard term-courses, but online registration for electives and other courses		
61	System should be able to register students automatically into predefined set of core courses as per the program		
62	Group allotment based on qualification/stream/college/experience		
63	Live Web-based drop/add with secure/password-protected access.		
64	Time conflict checking,		
65	on line web based application linked to elective bidding for electives		
66	User-defined prerequisite/co-requisite capability.		
67	System should be able to provide facility in self service portal which allows students to register only for courses which meet the requirements of their programs		

68	Prerequisite/co-requisite checking and manual override capability for master users.		
69	System should be able to identify study plans for students for a session / term based on their program		
70	Ability to view real-time enrolment counts for a course section by staff and Faculty		
71	Facility to enable staff to generate student schedules and bills at point of registration		
72	Time conflict checking and manual override capability for master users.		
73	Ability to search for available courses according to selected criteria (day/time, instructor, courses with available seats, etc.).		
74	Ability to see entire student schedule with appropriate fields (room, instructor, day/time, etc.)		
75	Printable student schedule , class list and student rosters		
76	Set grade types (audit, pass/fail).		
77	On-demand registration reports in real time.		
78	Flexibility in repeat course recalculation logic.		
79	Ability to place and remove registration holds.		
80	System should be able to indicate when the student is repeating a course at point of registration and have the system prevent registration if the maximum number of repeats has been reached.		
81	System should be able to indicate when the student is repeating		
82	Facility to enable staff to identify sections of a course that are open and do not conflict with a student's current schedule		
83	Ability to provide for customization of registration processing messages that students receive when registering online		
84	Ability to provide mass entry capabilities for adding, dropping or swapping classes for a group of students to include population selection, user defined error checking, de- selection of individual students be updates and audit capabilities		
85	System should be able to mass drop students from a specific section without having to access each student's registration individually		
86	System should be able to auto-drop (cancel the registration) for students who have registered but failed to make appropriate arrangements for payment.		
87	Facility to provide a mechanism to automatically drop students from all registered classes for a session / term when they defer or withdraw.		
88	Facility to enable staff to perform add/drop functions based on effective-dated rules, with ability to override errors		
89	Ability to prevent certain students from being able to drop classes online		
90	System should be able to restrict a student from dropping below a minimum number of registration credits once the minimum number of credits has been reached		
91	System should be able to verify that instructor approval, and other prerequisites have been met		
92	Facility to report student enrolment information based on user defined parameters as required for ministry		
VIII	**ePGP - Elective Course Registration and course bidding**		
93	Enable students to bid for the elective courses through ePGP self-service portal within the set timeframe		
94	Able to assign elective courses to students as per the logic set by the IIMK for course allocation . This is done elective bidding system application		

95	System should be able to indicate the shortage and excess of credits as per IIMK policy		
96	Enable staff to identify various types of conflicts during registering elective courses of students		
97	Ability to calculate and assign bidding points to students based on the criteria set by IIMK like academic performance etc.		
98	System should be able to ensure the minimum and maximum credit limit during course bidding		
99	Facility to generate report of courses which failed to achieve minimum limit of students		
100	Facility to provide for automated notifications in cases of waitlist whenever seat(s) become available		
101	Ability to provide waitlist status and position display in Self Service Portal		
102	System should be able to restrict registration in a section to only those students within a specific class, degree subject, level, program, field of study, department, attribute, cohort, campus, degree etc. as per the IIMK's requirement.		
103	Facility to indicate when the student is registered for courses with conflicting schedules		
104	Ability to indicate short and excess credits during registration as per the IIMK policy		
105	System should be able to check for linked courses during add and drop processing		
106	System should be able to restrict a course to only those students who have obtained a minimum score on assessment or other tests, or have met course prerequisites, or who have met a combination of test scores and course prerequisites.		
IX	**ePGP - Assessment - General**		
107	System should be able to define the grades/marks permitted with in a specific grading mode and the effect of each grade on credit hours attempted, earned and completed, and grade point average.		
108	System should be able to provide an electronic grade book with ability to define grading scales, graded components, their weightage.		
109	System should be able to set the grade submission window for various programs		
X	**ePGP - Assessment - Exam Management**		
110	**Program / application for scheduling exams**, including re-sits, clashes and common courses , assigning rooms and invigilators.		
111	System should be able to create exam schedule reports based on user defined parameters.		
112	Provide the capability to distinguish among regular re-sits and repeats.		
XI	**ePGP - Assessment - Assessment / Grading**		
113	Should provide a self-service grade book for faculty and academic associates to enter marks		
114	Provide maker-checker facility for entering marks and approval by respective Faculty		
115	Facility for Faculty and associate to take class rosters and grade reports		
116	Ability to produce grade sheets for a parameter- supplied term, sub-term, range of dates, or specific section.		

#	Description		
117	Ability to process partially maintained grades for various quiz, test etc		
118	Able to automatically notify relevant faculty when the submission dates for their courses are forthcoming through email , sms and portal		
119	Facility to ensure that students who withdraw or don't continue with a class are charged relevant tuition fees and are assigned a grade which does not impact class grade average		
XII	**ePGP - Assessment - Grade Processing**		
120	Facility to define IIMK rules and regulations for level or term Progressions		
121	Enable programmes administrators to enter parameters and respective weightages for final grades calculation for each course of the programmes separately		
122	Facility for faculty / Academic associate / staff to enter/upload marks for students, however the final grades should be visible to students after final progression and approval		
123	System should restrict grade change post final grades calculation		
124	Facility to display audit trails showing course, grade option, grade, or credits changes made to a student's academic record in such a way that students see only the latest grades / marks for each course (i.e. when a grade change is done, students see the later grade not the grade which was changed)		
125	Log of all grade changes made to a student's academic history records should be kept in the system		
126	Ability to calculate the academic standing of a student, including eligibility for any honors , 1st class etc		
XIII	**ePGP - Assessment - Grade Processing**		
127	Facility to define rules and regulations for level or term Progressions		
128	Facility for programmes administrators to enter parameters and respective weightages for final grades calculation for each course of the programmes separately		
129	Facility for faculty and academic associate to enter/upload marks for students, however the final grades should be visible to students after final progression/decisions are applied		
130	System should restrict grade change post final grades calculation		
131	Facility to generate audit trails showing course, grade option, grade, or credits changes made to a student's academic record in such a way that students see only the latest grades / marks for each course (i.e. when a grade change is done, students see the later grade not the grade which was changed)		
132	All grade changes made to a student's academic history records should be logged in the system		
133	Capability to calculate the academic standing of a student, including eligibility for any honors , rank , first class		
XIV	**ePGP - Assessment - Results Declaration**		
134	Facility for students to view their grades online in Students self Service Portal. Faculty and Concerned staff also to have the facility for viewing		
135	System should be able to display a student's record in chronological or subject order		
136	Ability to produce a revised grade report for a student after term grades are reported		
137	Facility for preventing students with relevant holds from viewing their grades, requesting transcripts etc.		

138	Capability to provide statistical reports by individual student, by class, which includes user defined parameters such as range individual student, by class, which includes user defined parameters such as range of marks/grades, statistical analysis (i.e. means etc.). This report to be available to Academic chairs , Deans and Directors		
139	Ability to provide a statistical report on grade average for each class, ensuring that this does not include specific grades (for example, Failed through Dishonesty, Withdrawn for Non-Attendance etc.). This report to be available to Academic chairs , Deans and Directors		
140	Facility to define repeat events and actions		
141	Ability to flag all student records that are under repeats		
XV	**ePGP - Assessment - Mark sheet/ Transcript**		
142	Facility for students to request an official transcript online through their self service portal		
143	Facility to display detailed information for each student, about transcripts requested, pending or produced, online.		
144	System should be able to maintain a record of requested and printed transcripts, along with information regarding users		
145	System should be able to provide for a variety of transcript types and content, including the ability to include / not include GPA / CGPA as well as Average / Cumulative Average calculations as appropriate, and to include component grades along with overall grade / mark for a course.		
146	Ability to automatically add transcript related charges to a student account for transcript requests.		
147	Capability to define official and unofficial transcripts with varying content by type of transcript and program.		
148	Able to give different transcripts an alternative name (i.e. Certification of Results).		
149	System should be able to flag repeated courses for display on a transcript.		
150	System should be able to display completed/awarded programs on a transcript and include classification of award.		
151	System should be able to include information regarding earned hours, exempted hours and total program credit hours on the transcript.		
152	System should be able to include grading legend by program and by course.		
153	Facility include an automated but updateable signature block on the official transcript.		
154	Ability to prevent ungraded courses from showing on the transcript.		
155	Facility to print courses and grades in a list without term information.		
156	Capability to track non-course requirements and print them on the transcript.		
XVI	**ePGP - Assessment - Graduation Management**		
157	Ability to set configurable IIMK rules needed for graduations.		
158	Facility to produce a list of students potentially eligible for graduation for a term		
159	Ability to provide a mechanism to readily determine whether or not students have met program requirements and are eligible for ePGP		
160	Enable students to pay convocation fees through ePGP self-service Portal		
161	Facility to schedule graduation ceremonies and maintain information on attendance and also manage student guests.		

162	Ability to automatically inactivate the student record after convocation for graduating students and for students who have completed their programs		
163	Facility for reports in hard copy and soft copy to the Alumni Office regarding graduated students, in a format specified by the Alumni Office. This data is to be updated in Alumni data base		
XVII	**ePGP - Assessment - Degree audit**		
164	Provision to revise the standard requirements for ePGP		
165	Ability to define non-course requirements for the program of study		
166	System should be able to consolidate degree program attributes as identified in catalogue and/or schedule. Attributes may be used to identify how a course may be used to satisfy degree requirements.		
167	Facility to report the course and non-course requirements a student has completed or not completed.		
168	ability to identify courses students have completed which don't contribute to their program requirements		
169	System should be able to waive course requirements, credit requirements, or non-course requirements (e.g. extra-curricular activities etc.).		
170	Ability to perform degree audit compliance for a student and be able to review the results immediately.		
171	Ability to define the classification of the awarding program like 1st class		
XVIII	**ePGP - Course feedback system**		
172	Facility for students to update the Faculty feedback for the course		
173	Facility for staff for checking and reviewing the data		
174	Facility for ePGP chair to approve and publish the feedback		
175	The result to be available on dashboards and self service portals		
XIX	**ePGP - Course allocation Report**		
176	Facility for area chairs to view the course allocation of PGP courses		
XX	**ePGP - General**		
177	Purchase of books, case study and other study and office material for PGP		
178	work flow for budget and purchase approvals		
179	**Facility to scan and store answer papers in Documents management system**		
180	Facility for allocation of staff and staff management		

ID	System Functionality - Student Information System - ePGP online	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Student Information System General Admin**		
1	System should enable authorized user to set the shortlisting criteria for each program separately every year		
2	System should enable maker-checker rule for setting shortlisting criteria		
3	System should enable configuration of customized email text templates with place holders for applicant name, application number, academic year, program name etc.		
4	Facility to set application fees based including appropriate taxes on applicant type and program		
5	Facility to specify additional uploads like SSLC , HSC , Degree, Diploma Certificates required if any, in the uploads section of the online application		
6	Capability to specify which of the additional uploads are mandatory / optional		
7	Enable freezing of certain information related to applicants and keep some fields editable by applicant		
8	There should be separate admission portal for CAT and non CAT programs like E PGP , FPM , eFPM etc. the admission process is defined in the		
9	There should be separate Student Self Service Portal for PGP , EPGP , FPM , e FPM programs		
II	**Student Information System - Student Record**		
10	System should enable to view and update relevant information online according to IIMK rules (including address, telephone, email and parent / guardian information). Learning Center and Exam Center option also to be there for ePGP online		
11	Ability to store all student information electronically, including documents that are submitted at various stages of the student life cycle (e.g. warning letters, reports etc.) and include the ability to be able to add comments to stored documents as required		
12	Facility to maintain unlimited IDs, names, addresses, e-mail addresses, and phone numbers of students		
13	System should be able to maintain the national ID number of the student separately from the identification number, while making sure it is searchable by staff.		
14	System should be able to record information regarding disabilities, while making sure it is visible to staff		
15	Facility to record, maintain and provide a mechanism to report a variety of information on international students to meet the reporting requirements of the government		
16	Ability to record general student comments or person comments specific to a term / session		
17	Facility to enable searching a student by name, program, term, National ID or ID or phone		
18	System should enable capturing and maintaining an unlimited number of courses for students with status and effective dates captured for historical purposes		

19	Facility to record and maintain an unlimited number of user-defined student attributes and groupings on a per term / session basis		
20	System should be able to identify and report on various groups of students		
III	**Student Information System - Student Finance**		
21	System should maintain various fee heads and charge code types as per programs- Tuition fee, accommodation fee and other heads as per IIMK policy. GST also to applied on the fees		
22	Student payment facility should be there in student self service Portal in web and mobile. They should also be able to view and print their payment status		
23	System should be able to process payments (cash, cheque, online payment and electronic transfer of funds), produce a physical receipt, and record the receipt number as part of the payment information		
24	Student Payment system should be integrated with Payment gateway (presently BOB/SBI Pay U) , Debit card , credit card , internet banking etc		
25	Ability to pay other types of fees like library fee , book fee , penalties etc		
26	Facility to manage Bank loan details taken by student		
27	System should be able to define default values for the charge and payment type codes		
28	System should be able to specify whether the charge and payment type codes are term specific or not		
29	Facility to provide the ability for student fee assessment to automatically reflect in the student's account		
30	Ability to store student bank account information		
31	Facility to define the general ledger accounting distributions for each charge and payment type code.		
32	Facility to allow multiple general ledger accounting distributions for each charge and payment type code.		
33	System should be able to specify general ledger accounting distributions based on the revenue recognition model at IIMK		
34	Facility to specify the rules for posting transactions for charges and payments, application of payments, and for reversals.		
35	Ability to support both student and non-student accounts receivable activity and to be able to differentiate between the two.		
36	Ability to generate credit card listing and auto calculates merchant charges based on a pre-determined rate set up in the system.		
37	System should be able to apply a specific charge to a group of individuals with the detail code, date, and amount		
38	System should be able to maintain and apply various tuition rates consistent with business rules. The billing program must interface with the student registration module to generate accurate statements.		
39	Ability to verify that each transaction is entered by date, reference, amount, account number, and description for transfer to the General Ledger.		
40	Ability to handle Tax Accounting ,GST as per defined rules		
41	System should be able to apply a rebate for advance payment of registration / enrolment related fees (i.e. fees paid in advance for the full year and / or program), with rebates calculated as net of any other discounts / scholarships		
42	Facility to assess late fees		

43	System should enable other departments to add limited charges to the account (for example, Library staff should be allowed to add only library fines and Housing staff should be allowed to add only housing damage charges)		
44	Facility to define authorization rules that permit students to be exempt from specified charge		
45	ability to process multi-term payments covering past and future academic terms / sessions.		
46	Facility to produce a descriptive receipt, with the option of listing the student's term, program and charges		
47	Ability to support automatic receipt numbering and varying receipt sizes		
48	Ability to provide foreign currency conversion		
49	Should be able to record payments against an account		
50	Should be able to record miscellaneous cash receipts		
51	Should be able to issue an account refund as a cheque or direct deposit		
52	Facility to identify payment defaulters to enable administration to take necessary actions		
53	Facility to place and remove holds on an account either automatically or individually		
54	Ability to apply payments automatically based on rules defined for the payment and charge codes		
55	Facility to generate report on the transactions for all cashier		
56	Facility to generate report on the transactions for individual		
57	Facility to generate bill or targeted billing		
58	Ability to print appropriate messages on the bill		
59	Facility to include awarded scholarship credits and specify whether these credits affect the balance due when processing the bill		
60	Ability to specify the billing amounts in a Indian Currency for Indian Students and international currency for International students for PGP		
61	Facility to automatic generation of reminder letters for payment to be sent through SMS , email and display in Portal. Provision for sending the alert also to be in the system		
62	Facility to view and generate reports on total collections, total defaulters amounts, tax details, term wise collections, students number and attrition, student holds and defaulters . Provision for generating fee demand notice for individual student for submission to bank / and employer		
63	Facility to view and generate reports like enrolments, fee collection course wise/month wise/ year wise, compensation for each participating faculty and coordinator for short term MDP		
64	Reports for reconciliation		
65	Reports on daily , monthly and semester collection statement		
IV	Student Information System - Students Academic Record		
66	Facility to maintain overall marks average as per credits defined for each student.		
67	Capability to record and maintain an unlimited number of courses for a particular academic term. Course Code , Course Name and academic year are critical information		
68	ability to record an unlimited number of grade changes for a student enrolment. Provision to record such grade changes with appropriate remarks & apply maker/checker concept here.		
69	Capability to maintain detailed information, including title or pertinent comments, about an unlimited number of qualifying papers. provision for generating interim academic transcript do student		

70	Facility to maintain an unlimited number of academic events for a student (could include academic dishonesty tracking, medical deferrals etc.).		
71	Facility to maintain an unlimited number of degrees and certificates for a student.		
72	Maintain a historical record of past and current subjects		
VI	**Student Information System - Support systems**		
73	**Faculty Credit Management System**		
74	Faculty gets credit for taking classes for ePGP , FPM, MDP , Research Published etc . As soon as the class is completed , research paper is published the data is to be updated by MDP , e PGP office and sent to Faulty , Area in charge for approvals . After approval the credit to be updated in Faculty Credit management system . This data to be available in Faculty self service portal , Deans and Directors Dash board		
75	**Accreditation Management system**		
76	This system will cater three to four different accreditation systems . The data to be captured from ERP and Data bank and the accreditation parameter to be computed and reported		
VII	**Student Information System - Integration**		
77	SIS to be integrated to Library Management system , Learning Management System Moodle, Self Service Portal , Biometric Systems		
Admin			
78	Procurement of case studies , text books through system		
79	Approval for case studies , books through workflow		
80	Travel , Transport , Guest house, MDC booking through system		
81	Update in faculty credit management system based on classes taken		
82	Participant applications like batch change , certificate for loan through workflow		
83	Work flow for New dues clearance for Students		

ID	System Functionality - Student Information System - ePGP online	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**ePGP - Admissions - on line Application**		
1	A portal for online application for students to apply. This System should enable applicants to apply for admission online as per the programs guidelines		
2	uploading file of the applicants data for some programs (i.e. PGP, FABM, FPM), System should enable alpha-numeric application number format with desired prefix and suffix		
3	System should enable sending communication to the registered email ID. Individual as well as mass communication based on certain criteria like shortlisted for interview, application submission pending etc		
4	System should enable capturing essential applicant information like :		
	Identification type and no		
	Date of birth		
	Educational background		
	Test scores		
	Achievements		
	Work experience		
	Affiliation / Company name / Self employed		
	Contact address / no / emailid		
	Reservation status		
	Any other data as and when added by IIMK		
5	Facility for applicants to upload photo and supporting documents in the appropriate sections, with a facility for the applicant to delete and re-upload any document		
6	Facility to enable the applicant to submit the applicable fee via a payment Gateway / credit card / debit card / etc . Option for multiple gateways		
7	Have facility to allow the applicant to review the application in PDF format before submission.PDF generation of application form should be possible after successful submission		
8	System should restrict the application submission within the start and end date as set by an authorized user of the respective programme. Provision for amendment with appropriate authorization. To administer the due date extensions.		
9	After Submission the system should restrict the applicant to view the application in read mode only		
10	Ability to use system generated, National ID, or other ID numbers for student identification.		
II	**ePGP - Application Processing**		
11	Facility to generate course wise reports of the applications received for platform e PGP and ePGP Kochi		
12	System should enable multi-level short listing of applicants based on a set of criteria defined by IIMK for the programmes		
13	System to generate eMAT Roll no for test and interview		
14	System should enable the allocation of eMAT Test / interview/Group discussion venues, slot and dates based on the capacity and preference selected by the candidates		
15	System should have facility to notify selected number of applicants by email and by letter for eMAT. Provision for downloading the test call letter from the portal.		

16	System should enable generation of attendance rosters of all applicants for eMAT at a particular center		
17	System should enable uploading of attendance and scores for the eMAT test/ interview/group discussion in the system database using excel or manual entry for each student		
18	Enable corrections to academic scores and work experience duration based on verification of documents		
19	System should allow user to download applicants' complete data onto a spreadsheet and as PDF. The system should also allow to download the documents		
20	Enable authorized user to mark certain activities in system which are performed outside the system like verification of documents, fee received through DD etc. throughout the application process		
III	**ePGP - Admission & Enrolment**		
	Facility to upload data for selected students into the system		
21	Facility for e selected students to submit consent, mandatory documents online ,upload physically signed and scanned forms online, remit fees through payment gateway. The fee payment to be integrated with Student Finance of ERP		
22	System should be able to manage applicant waitlist and process it in case admission is not taken by a selected applicant		
23	Facility to generate selection letters for the selected applicants		
24	System controls to ensure that applicant is admitted to a single program		
25	Enable generation of unique alpha-numeric student ID as per the format decided by IIMK ePGP programme		
26	Facility to send mail to concerned sections like Library, IT , etc regarding the list of admissions . System should also have facility for support departments (Library, Hostel, publication etc.) to view and receive information related to newly admitted students		
27	Dashboards to be developed which helps user to view applicant's data as per program, category, gender, education background, experience and other criteria required. Provision for generating the customised batch profile report in excel and PDF		
28	Access to be provided for Student Self Service Portal , Wifi , electronic platform etc		
IV	**ePGP - Student Master**		
29	Facility for students to view and update relevant information online according to IIMK rules (including address, telephone, email and parent / guardian information). Updation of critical information like Name, DOB, Learning & Exam center should require authorization from office.		
30	Database to store all student information electronically, including documents that are submitted at various stages of the student life cycle (e.g. warning letters, reports etc.) and include the ability to be able to add comments to stored documents as required		
31	Database to maintain unlimited IDs, national ID, names, addresses, e-mail addresses, and phone numbers of students		
32	Ability to associate medical and special equipment needs to a person		
33	Ability to record information regarding disabilities, while making sure it is visible to staff		
34	Facility to record general student comments or person comments specific to a term / session		
35	Facility for searching a student by name, program, term, National ID or ID or phone ,location, category - male /female etc		
36	System should have the capability to record and maintain an unlimited number of user-defined student attributes and groupings on a per term / session basis		
V	**ePGP - Attendance**		
37	Facility to upload attendance data from e platform service provider for ePGP online students		

38	Facility for faculty/Associate to upload attendance through use of excel files for ePGP Kochi		
39	Workflow to enable students to apply for leave and submit relevant proofs online. Facility for approval form competent authority		
40	Capability to record leave of absence information for all students		
41	Facility for Students to view their attendance , leaves online form the E PGP Students self service portal		
42	Facility to generate reports on the percentage of attendance for specific term for specific course for ePGP Kochi and E PGP online course		
43	Facility to generate alert to faculty for absenteeism / low attendance record of students warning letters to students based on absenteeism / attendance records		
44	Biometric Attendance for students to be integrated in future		
VI	**ePGP - Course Management**		
45	Faculty for addition of new program and course and classify of the newly added courses as core or electives		
46	Facility to enable Lecture-Case-Quiz break up of courses to be changed as on need basis		
47	Facility for few courses to be activated/deactivated as on need basis		
48	Facility to enable creating and maintaining program requirements for all programs including current requirement		
49	System should enable defining the courses including full course structure information as per course calendar. This should include data such as course title, course outline, course credit, grade mode, capacity and any other IIMK specific information etc.		
50	Ensure that module objectives / learning objectives and the assessment of each module is mapped to the program objective to facilitate a determination of whether or not students have attained all requirements.		
51	Provide the ability to define specific course offerings for a term		
52	Work flow for faculty to request for addition of new course through online workflow		
53	Enable tracking of course addition request		
54	Facility to enable assigning a course code to the appropriate course		
55	System should enable identifying courses by category (e.g. compulsory, elective courses etc.)		
56	System should enable maintaining start and end sessions for each course		
57	Facility to maintain historical information about a course		
VII	**ePGP - Course Registration**		
58	Batch processing from web based course registration of students.		
59	Auto-registration to predefined standard term-courses, but online registration for electives and other courses		
60	System should be able to register students automatically into predefined set of core courses as per the program		
61	Group allotment based on qualification/stream/college/experience		
62	Live Web-based drop/add with secure/password-protected access.		
63	Time conflict checking,		
64	on line web based application linked to elective bidding for electives		
65	User-defined prerequisite/co-requisite capability.		
66	System should be able to provide facility in self service portal which allows students to register only for courses which meet the requirements of their programs		
67	Prerequisite/co-requisite checking and manual override capability for master users.		

68	System should be able to identify study plans for students for a session / term based on their program		
69	Ability to view real-time enrolment counts for a course section by staff and Faculty		
70	Facility to enable staff to generate student schedules and bills at point of registration		
71	Time conflict checking and manual override capability for master users.		
72	Ability to search for available courses according to selected criteria (day/time, instructor, courses with available seats, etc.).		
73	Ability to see entire student schedule with appropriate fields (room, instructor, day/time, etc.)		
74	Printable student schedule , class list and student rosters		
75	Set grade types (audit, pass/fail). Letter grading to be applied		
76	On-demand registration reports in real time.		
77	Flexibility in repeat course recalculation logic.		
78	Ability to place and remove registration holds.		
79	System should be able to indicate when the student is repeating a course at point of registration and have the system prevent registration if the maximum number of repeats has been reached.		
80	System should be able to indicate when the student is repeating		
81	Facility to enable staff to identify sections of a course that are open and do not conflict with a student's current schedule		
82	Ability to provide for customization of registration processing messages that students receive when registering online		
83	Ability to provide mass entry capabilities for adding, dropping or swapping classes for a group of students to include population selection, user defined error checking, de- selection of individual students be updates and audit capabilities		
84	System should be able to mass drop students from a specific section without having to access each student's registration individually		
85	System should be able to auto-drop (cancel the registration) for students who have registered but failed to make appropriate arrangements for payment.		
86	Facility to provide a mechanism to automatically drop students from all registered classes for a session / term when they defer or withdraw.		
87	Facility to enable staff to perform add/drop functions based on effective-dated rules, with ability to override errors		
88	Ability to prevent certain students from being able to drop classes online		
89	System should be able to restrict a student from dropping below a minimum number of registration credits once the minimum number of credits has been reached		
90	System should be able to verify that instructor approval, and other prerequisites have been met		
91	Facility to report student enrolment information based on user defined parameters as required for ministry		
VIII	**ePGP - Elective Course Registration and course bidding**		
92	Enable students to bid for the elective courses through ePGP self-service portal within the set timeframe		
93	Able to assign elective courses to students as per the logic set by the IIMK for course allocation . This is done elective bidding system application		
94	System should be able to indicate the shortage and excess of credits as per IIMK policy		
95	Enable staff to identify various types of conflicts during registering elective courses of students		
96	Ability to calculate and assign bidding points to students based on the criteria set by IIMK like academic performance etc.		

97	System should be able to ensure the minimum and maximum credit limit during course bidding		
98	Facility to generate report of courses which failed to achieve minimum limit of students		
99	Facility to provide for automated notifications in cases of waitlist whenever seat(s) become available		
100	Ability to provide waitlist status and position display in Self Service Portal		
101	System should be able to restrict registration in a section to only those students within a specific class, degree subject, level, program, field of study, department, attribute, cohort, campus, degree etc. as per the IIMK's requirement.		
102	Facility to indicate when the student is registered for courses with conflicting schedules		
103	Ability to indicate short and excess credits during registration as per the IIMK policy		
104	System should be able to check for linked courses during add and drop processing		
105	System should be able to restrict a course to only those students who have obtained a minimum score on assessment or other tests, or have met course prerequisites, or who have met a combination of test scores and course prerequisites.		
IX	**ePGP - Assessment - General**		
106	System should be able to define the grades/marks permitted with in a specific grading mode and the effect of each grade on credit hours attempted, earned and completed, and grade point average.		
107	System should be able to provide an electronic grade book with ability to define grading scales, graded components, their weight age.		
108	System should be able to set the grade submission window for various programs		
X	**ePGP - Assessment - Exam Management**		
109	**Program / application for scheduling exams**, including re-sits, clashes and common courses , assigning rooms and invigilators.		
110	System should be able to create exam schedule reports based on user defined parameters.		
111	Provide the capability to distinguish among regular re-sits and repeats.		
XI	**ePGP - Assessment - Assessment / Grading**		
112	Should provide a self-service grade book for faculty and academic associates to enter marks		
113	Provide maker-checker facility for entering marks and approval by respective Faculty		
114	Facility for Faculty and associate to take class rosters and grade reports		
115	Ability to produce grade sheets for a parameter- supplied term, sub-term, range of dates, or specific section.		
116	Ability to process partially maintained grades for various quiz, test etc		
117	Able to automatically notify relevant faculty when the submission dates for their courses are forthcoming through email , sms and portal		
118	Facility to ensure that students who withdraw or don't continue with a class are charged relevant tuition fees and are assigned a grade which does not impact class grade average		
XII	**ePGP - Assessment - Grade Processing**		

119	Facility to define IIMK rules and regulations for level or term Progressions		
120	Enable programmes administrators to enter parameters and respective weightages for final grades calculation for each course of the programmes separately		
121	Facility for faculty / Academic associate / staff to enter/upload marks for students, however the final grades should be visible to students after final progression and approval		
122	System should restrict grade change post final grades calculation		
123	Facility to display audit trails showing course, grade option, grade, or credits changes made to a student's academic record in such a way that students see only the latest grades / marks for each course (i.e. when a grade change is done, students see the later grade not the grade which was changed)		
124	Log of all grade changes made to a student's academic history records should be kept in the system		
125	Ability to calculate the academic standing of a student, including eligibility for any honors , 1st class etc		
XIII	**ePGP - Assessment - Grade Processing**		
126	Facility to define rules and regulations for level or term Progressions		
127	Facility for programmes administrators to enter parameters and respective weightages for final grades calculation for each course of the programmes separately		
128	Facility for faculty and academic associate to enter/upload marks for students, however the final grades should be visible to students after final progression/decisions are applied		
129	System should restrict grade change post final grades calculation		
130	Facility to generate audit trails showing course, grade option, grade, or credits changes made to a student's academic record in such a way that students see only the latest grades / marks for each course (i.e. when a grade change is done, students see the later grade not the grade which was changed)		
131	All grade changes made to a student's academic history records should be logged in the system		
132	Capability to calculate the academic standing of a student, including eligibility for any honors , rank , first class		
XIV	**ePGP - Assessment - Results Declaration**		
133	Facility for students to view their grades online in Students self Service Portal. Faculty and Concerned staff also to have the facility for viewing. Grade to be released to students after proper authorisation		
134	System should be able to display a student's record in chronological or subject order		
135	Ability to produce a revised grade report for a student after term grades are reported		
136	Facility for preventing students with relevant holds from viewing their grades, requesting transcripts etc.		
137	Capability to provide statistical reports by individual student, by class, which includes user defined parameters such as range individual student, by class, which includes user defined parameters such as range of marks/grades, statistical analysis (i.e. means etc.). This report to be available to Academic chairs , Deans and Directors		
138	Ability to provide a statistical report on grade average for each class, ensuring that this does not include specific grades (for example, Failed through Dishonesty, Withdrawn for Non-Attendance etc.). This report to be available to Academic chairs , Deans and Directors		
139	Facility to define repeat events and actions		
140	Ability to flag all student records that are under repeats		
XV	**ePGP - Assessment - Mark sheet/ Transcript**		

141	Facility for students to request an official transcript online through their self service portal		
142	Facility to display detailed information for each student, about transcripts requested, pending or produced, online.		
143	System should be able to maintain a record of requested and printed transcripts, along with information regarding users		
144	System should be able to provide for a variety of transcript types and content, including the ability to include / not include GPA / CGPA as well as Average / Cumulative Average calculations as appropriate, and to include component grades along with overall grade / mark for a course.		
145	Ability to automatically add transcript related charges to a student account for transcript requests.		
146	Capability to define official and unofficial transcripts with varying content by type of transcript and program.		
147	Able to give different transcripts an alternative name (i.e. Certification of Results).		
148	System should be able to flag repeated courses for display on a transcript.		
149	System should be able to display completed/awarded programs on a transcript and include classification of award.		
150	System should be able to include information regarding earned hours, exempted hours and total program credit hours on the transcript.		
151	System should be able to include grading legend by program and by course.		
152	Facility include an automated but updateable signature block on the official transcript.		
153	Ability to prevent ungraded courses from showing on the transcript.		
154	Facility to print courses and grades in a list without term information.		
155	Capability to track non-course requirements and print them on the transcript.		
XVI	**ePGP - Assessment - Graduation Management**		
156	Ability to set configurable IIMK rules needed for graduations.		
157	Facility to produce a list of students potentially eligible for graduation for a term		
158	Ability to provide a mechanism to readily determine whether or not students have met program requirements and are eligible for ePGP		
159	Enable students to pay convocation fees through ePGP self-service Portal		
160	Facility to schedule graduation ceremonies and maintain information on attendance and also manage student guests.		
161	Ability to automatically inactivate the student record after convocation for graduating students and for students who have completed their programs		
162	Facility for reports in hard copy and soft copy to the Alumni Office regarding graduated students, in a format specified by the Alumni Office. This data is to be updated in Alumni data base		
XVII	**ePGP - Assessment - Degree audit**		
163	Provision to revise the standard requirements for ePGP		
164	Ability to define non-course requirements for the program of study		
165	System should be able to consolidate degree program attributes as identified in catalogue and/or schedule. Attributes may be used to identify how a course may be used to satisfy degree requirements.		
166	Facility to report the course and non-course requirements a student has completed or not completed.		
167	ability to identify courses students have completed which don't contribute to their program requirements		

168	System should be able to waive course requirements, credit requirements, or non-course requirements (e.g. extra-curricular activities etc.).		
169	Ability to perform degree audit compliance for a student and be able to review the results immediately.		
170	Ability to define the classification of the awarding program like 1st class		
XVIII	**ePGP - Course feedback system**		
171	Facility for students to update the Faculty feedback for the course		
172	Facility for staff for checking and reviewing the data		
173	Facility for EPGP chair to approve and publish the feedback		
174	The result to be available on dashboards and self service portals		
XIX	**ePGP - Course allocation Report**		
175	Facility for area chairs to view the course allocation of PGP courses		
XX	**ePGP - General**		
176	Purchase of books, case study and other study and office material for PGP		
177	work flow for budget and purchase approvals		
178	**Facility to scan and store answer papers in Documents management system**		
179	Facility for allocation of staff and staff management		

ID	System Functionality - Management Development Program - MDP	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**MDP - Portal**		
1	A Separate Portal for Placement. The portal to be available in all devices Web , ipad , mobile		
II	**MDP / FDP - Course Setup**		
2	Facility to maintain a database / course catalogue of MDP programs with following details		
2.1	Program name		
2.2	Course Area		
2.3	Start Date		
2.4	Identification type and no		
2.5	End date		
2.6	Brief summary		
2.7	Course catalogue (in word and Pdf)		
2.8	Target Group		
2.9	No of seats / capacity		
2.10	Companies Contacted , feedback , response		
2.11	Any other details		
3	Database of Sponsors for MDP program		
4	Facility to store MDP Calendar		
5	Program Approval through Workflows		
6	Ability to book the time slot in faculty calendar when faculty is mapped to a course		
III	**MDP / FDP - Course Registration**		
7	Enable to search Prospective candidates based on criteria and send emails to them		
8	Record of details send to prospective participants / companies program wise		
9	**Online portal for prospective candidates to register for MDP program**		
10	Facility to send forms in standard format for bulk registration / company sponsored programs		
11	Facility for bulk registration of participants by uploading file of the applicants data		
12	Facility for sending notification on events like schedule change, course cancellation/postpone and any other event as per the Institute requirement		
13	Facility to capture the capacity of each course and update the available seats automatically on registration		
14	Facility to restrict the application submission within the start and end date as set by an authorized user of the respective programme		
15	Facility for Generating Welcome and confirmation letter		
IV	**MDP / FDP - Program Execution**		
16	Facility to generate the list of course participants for each program		
17	Facility to capture the attendance of the participants		
18	Able to generate the certificate of participation for participants		

19	Ability to track the fee status of each participant for all courses and also to generate the list of fee defaulters and send notifications to relevant stakeholders		
20	Facility to calculate the contribution/disbursement amount for each faculty and coordinator course wise as per IIMK rules		
21	Facility to update the credit for Faculty in Faculty credit management system after approvals through Work flow .		
22	Maintain accounts of participants and details of courses attended by them		
23	Facility to withdraw or postpone by participant		
24	Facility to capture onsite MDP program		
25	Enable tracking of participant's eligibility to become IIMK's alumni like completion of particular no. of days courses, payment of alumni fee etc and update alumni database.		
26	Facility to capture online feedback from participants & Faculty and update **Feedback Management System**		
27	Facility to request MDP room booking , transport , food , Course material, kits etc with MDP cost center through workflow.		
V	**MDP / FDP - Reports**		
28	Generate Report / View on participant's data as per the participant's industry, course area, gender, education background, experience, organization and other criteria required by IIMK		
29	Facility to view course wise participant		
30	Report / View on expenditure program wise and total		
31	Report on Profitability analysis program wise and total		
32	Ability to generate analytical report on future prospects		
VI	**MDP / FDP - MDP Faculty allocation system in MDP portal**		
33	Facility to publish the request from Corporates on MDP program		
34	Facility for Faculties to express interest for the program		
35	Facility to display the allocation of Faculty for MDP/FDP		
36	This data to be dispalcyed in MDP portal, Faculty Self service and Dashboards		
VII	**MDP / FDP - MDP Portal for Alumni Reconnect**		
37	The MDP portal should have facility to post information, messages and interact with MDP participants who has attended various program		
38	**Detailed content of MDP portal to be decided during Business Blue print phase**		

ID	System Functionality - Student Information System - FPM	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Student Information System General Admin**		
1	System should enable authorized user to set the short listing criteria for each program separately every year		
2	System should enable maker-checker rule for setting shortlisting criteria		
3	System should enable configuration of customized email text templates with place holders for applicant name, application number, academic year, program name etc.		
4	Facility to set application fees based on applicant type and program		
5	Facility to specify additional uploads required if any, in the uploads section of the online application		
6	Capability to specify which of the additional uploads are mandatory / optional		
7	Enable freezing of certain information related to applicants and keep some fields editable by applicant		
8	There should be separate admission portal for CAT and non CAT programs like E PGP , FPM , eFPM etc. the admission process is defined in the		
9	There should be separate Student Self Service Portal for PGP , EPGP , FPM , e FPM programs		
II	**Student Information System - Student Record**		
10	System should enable to view and update relevant information online according to IIMK rules (including address, telephone, email and parent / guardian information)		
11	Ability to store all student information electronically, including documents that are submitted at various stages of the student life cycle (e.g. warning letters, reports etc.) and include the ability to be able to add comments to stored documents as required		
12	Facility to maintain unlimited IDs, names, addresses, e-mail addresses, and phone numbers of students		
13	System should be able to maintain the national ID number of the student separately from the identification number, while making sure it is searchable by staff.		
14	System should be able to record information regarding disabilities, while making sure it is visible to staff		
15	Facility to record, maintain and provide a mechanism to report a variety of information on international students to meet the reporting requirements of the government		
16	Ability to record general student comments or person comments specific to a term / session		
17	Facility to enable searching a student by name, program, term, National ID or ID or phone		
18	System should enable capturing and maintaining an unlimited number of courses for students with status and effective dates captured for historical purposes		
19	Facility to record and maintain an unlimited number of user-defined student attributes and groupings on a per term / session basis		

20	System should be able to identify and report on various groups of students		
III	**Student Information System - Student Finance**		
21	System should maintain various fee heads and charge code types as per programs- Tuition fee, accommodation fee and other heads as per IIMK policy		
22	Student payment facility should be there in student self service Portal in web and mobile. They should also be able to view and print their payment status		
23	System should be able to process payments (cash, cheque, online payment and electronic transfer of funds), produce a physical receipt, and record the receipt number as part of the payment information		
24	Student Payment system should be integrated with Payment gateway (presently BOB/SBI Pay U) , Debit card , credit card , internet banking etc		
25	Ability to pay other types of fees like library fee , book fee , penalties etc		
26	Facility to manage Bank loan details taken by student		
27	System should be able to define default values for the charge and payment type codes		
28	System should be able to specify whether the charge and payment type codes are term specific or not		
29	Facility to provide the ability for student fee assessment to automatically reflect in the student's account		
30	Ability to store student bank account information		
31	Facility to define the general ledger accounting distributions for each charge and payment type code.		
32	Facility to allow multiple general ledger accounting distributions for each charge and payment type code.		
33	System should be able to specify general ledger accounting distributions based on the revenue recognition model at IIMK		
34	Facility to specify the rules for posting transactions for charges and payments, application of payments, and for reversals.		
35	Ability to support both student and non-student accounts receivable activity and to be able to differentiate between the two.		
36	Ability to generate credit card listing and auto calculates merchant charges based on a pre-determined rate set up in the system.		
37	System should be able to apply a specific charge to a group of individuals with the detail code, date, and amount		
38	System should be able to maintain and apply various tuition rates consistent with business rules. The billing program must interface with the student registration module to generate accurate statements.		
39	Ability to verify that each transaction is entered by date, reference, amount, account number, and description for transfer to the General Ledger.		
40	Ability to handle Tax Accounting ,GST as per defined rules		
41	System should be able to apply a rebate for advance payment of registration / enrolment related fees (i.e. fees paid in advance for the full year and / or program), with rebates calculated as net of any other discounts / scholarships		
42	Facility to assess late fees		
43	System should enable other departments to add limited charges to the account (for example, Library staff should be allowed to add only library fines and Housing staff should be allowed to add only housing damage charges)		

44	Facility to define authorization rules that permit students to be exempt from specified charge		
45	ability to process multi-term payments covering past and future academic terms / sessions.		
46	Facility to produce a descriptive receipt, with the option of listing the student's term, program and charges		
47	Ability to support automatic receipt numbering and varying receipt sizes		
48	Ability to provide foreign currency conversion		
49	Should be able to record payments against an account		
50	Should be able to record miscellaneous cash receipts		
51	Should be able to issue an account refund as a cheque or direct deposit		
52	Facility to identify payment defaulters to enable administration to take necessary actions		
53	Facility to place and remove holds on an account either automatically or individually		
54	Ability to apply payments automatically based on rules defined for the payment and charge codes		
55	Facility to generate report on the transactions for all cashier		
56	Facility to generate report on the transactions for individual		
57	Facility to generate bill or targeted billing		
58	Ability to print appropriate messages on the bill		
59	Facility to include awarded scholarship credits and specify whether these credits affect the balance due when processing the bill		
60	Ability to specify the billing amounts in a Indian Currency for Indian Students and international currency for International students for PGP		
61	Facility to automatic generation of reminder letters for payment to be sent through SMS , email and display in Portal		
62	Facility to view and generate reports on total collections, total defaulters amounts, tax details, term wise collections, students number and attrition, student holds and defaulters		
63	Facility to view and generate reports like enrolments, fee collection course wise/month wise/ year wise, compensation for each participating faculty and coordinator for short term MDP		
64	Reports for reconciliation		
65	Reports on daily , monthly and semester collection statement		
IV	**Student Information System - Students Academic Record**		
66	Facility to maintain overall marks average as per credits defined for each student.		
67	Capability to record and maintain an unlimited number of courses for a particular academic term.		
68	ability to record an unlimited number of grade changes for a student enrolment.		
69	Capability to maintain detailed information, including title or pertinent comments, about an unlimited number of qualifying papers.		
70	Facility to maintain an unlimited number of academic events for a student (could include academic dishonesty tracking, medical deferrals etc.).		
71	Facility to maintain an unlimited number of degrees and certificates for a student.		
72	Maintain a historical record of past and current subjects		
V	**Student Information System - Support systems**		
V-a	**Faculty Credit Management System**		

73	Faculty gets credit for taking classes for ePGP , FPM, MDP , Research Published etc . As soon as the class is completed , research paper is published the data is to be updated by MDP , e PGP office and sent to Faulty , Area in charge for approvals . After approval the credit to be updated in Faculty Credit management system . This data to be available in Faculty self service portal , Deans and Directors Dash board		
V-b	**Accreditation Management system**		
74	This system will cater three to four different accreditation systems . The data to be captured from ERP and Data bank and the accreditation parameter to be computed and reported		
VI	**Student Information System - Integration**		
75	SIS to be integrated to Library Management system , Learning Management System Moodle, Self Service Portal , Biometric Systems, email server, sms gateway, other academic system , student finance		

ID	System Functionality - Student Information System - FPM	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**FPM - Admissions - on line Application**		
1	A portal for online application for students to apply. This System should enable applicants to apply for admission online as per the programs guidelines.system should also support uploading file of the applicants data.System should enable alpha-numeric application number format with desired prefix and suffix		
2	System should enable sending communication to the registered email ID		
3	Import details for FPM students who have cleared CAT		
4	System should enable capturing essential applicant information like :		
5	Indentification type and no		
6	Date of birth		
7	Educational background		
8	Test scores		
9	Achievements		
10	Work experience		
11	Affilaition / Company name / Self employed		
12	Contact address / no / emailid		
13	Any other data as and when added by IIMK		
14	Facility for applicants to upload photo and supporting documents in the appropriate sections, with a facility for the applicant to delete and re-upload any document		
15	Facility to enable the applicant to submit the applicable fee via a payment Gateway / credit card / debit card / etc		
16	Have facility to allow the applicant to review the application in PDF format before submission		
17	System should restrict the application submission within the start and end date as set by an authorized user of the respective programme		
18	After Submission the system should restrict the applicant to view the application in read mode only		
19	Ability to use system generated, National ID, or other ID numbers for student identification.		
II	**FPM - Application Processing**		
20	Facility to generate **Area wise** reports of the applications received		
21	System should enable multi-level shortlisting of applicants based on a set of criteria defined by IIMK for FPM		
22	System to generate Roll no for FPM test and interview		
23	System should have facility to notify selected number of applicants by email and by letter for FPM test / Interview		
24	System should enable generation of attendance rosters of all applicants for FPM test at IIMK		
25	System should enable uploading of attendance and scores for the FPM test and interview in the system database using excel or manual entry for each student		
26	Enable corrections to academic scores and work experience duration based on verification of documents		

27	System should allow user to download applicants' complete data onto a spreadsheet and as PDF. The system should also allow to download the documents		
28	Enable authorized user to mark certain activities in system which are performed outside the system like verification of documents, fee received through DD etc. throughout the application process		
III	**FPM - Admission & Enrolmant**		
29	Facility to upload data for selected students into the system		
30	Facility for selected students to submit consent, mandatory documents online ,upload physically signed and scanned forms online, remit fees through payment gateway. The fee payment to be integerated with Student Finanace of ERP		
31	System should be able to manage applicant waitlist and process it in case admission is not taken by a selected applicant		
32	Facility to generate selection letters for the selected applicants		
33	System controls to ensure that applicant is admitted to a single program		
34	Enable generation of unique alpha-numeric student ID as per the format decided by IIMK FPM programme		
35	Faclilty to send mail to concerned sections like Libraray, IT , etc reagrding the list of admissions . System should also have facility for support departments (Library, Hostel, publication etc.) to view and receive information related to newly admitted students		
36	Facility to assign supervisors/guide to Phd Students after concurrence from associated faculty and department heads		
37	Facility to notify PhD student, faculty, HOD on allotment or re-allotment of supervisors/guide		
38	Dashboards to be developed which helps user to view applicant's data as per program, category, gender, education background, experience and other criteria required		
39	Access to be provided for Student Self Service Portal for FPM , Wifi , electronic platform etc		
IV	**FPM - Student Master**		
40	Facility for students to view and update relevant information online according to IIMK rules (including address, telephone, email and parent / guardian information)		
41	Database to store all student information electronically, including documents that are submitted at various stages of the student life cycle (e.g. warning letters, reports etc.) and include the ability to be able to add comments to stored documents as required		
42	Database to maintain unlimited IDs, national ID, names, addresses, e-mail addresses, and phone numbers of students		
43	Ability to associate medical and special equipment needs to a person		
44	Ability to record information regarding disabilities, while making sure it is visible to staff		
45	Facility to record general student comments or person comments specific to a term / session		
46	Facility for searching a student by name, program, term, National ID or ID or phone ,location, category - male /female etc		
47	Faclilty to send mail to concerned sections like Libraray, IT , etc reagrding the list of admissions . System should also have facility for support departments (Library, Hostel, publication etc.) to view and receive information related to newly admitted		
48	Facility to capture Faculty advisor(FAC), RAC Committie members,Thesis Advisory committie members (TAC) , panel of examiners for the student		

49	System should have the capability to record and maintain an unlimited number of user-defined student attributes and groupings on a per term / session basis		
V	**FPM - Attendance**		
50	Facility for FPM Associate to upload attendance through use of excel files		
51	Workflow to enable students to apply for leave, Special leave and submit relevant proofs online. Facility for approval form competent authority		
52	Capability to record leave of absence information for all students		
53	Facility for Students to view their attendance , leaves online form the FPM Students self service portal		
54	Facility to generate reports on the percentage of attendance for specific term for specific course for FPM students		
55	Facility to generate alert to faculty for absenteeism / low attendance record of students warning letters to students based on absenteeism / attendance records		
56	Biometric Attendance for students to be integerated in future		
VI	**FPM - Course Management**		
57	Facility for the student to register for the PGP courses during the first two years. The registration , evalaution, grading etc is same as PGP process PGP academic process		
58	Facility for the student to register for the FPM courses during the first two years. The registration , evalaution, grading etc as per the PGP academic process.		
59	Facility for Research advisory committie to propose Course of Independent study		
60	Facility for the student to register for Course of Independent study and tge grades given by the RAC to be updated in the grade card of FPM student		
VII	**FPM - Course Assesment - General**		
61	System should be able to define the grades/marks permitted with in a specific grading mode and the effect of each grade on credit hours attempted, earned and completed, and gradepoint average.		
62	System should be able to provide an electronicgrade book with ability to define grading scales,graded components, their weightage.		
63	System should be able to set the grade submission window for various programs		
VIII	**FPM - Research Activities**		
64	Facility for the student to make request for Research Advisory committie (RAC) through an workflow		
65	Facility for RAC approval by RAC members, Area chair and FPM chair		
66	System to have a check for approving the RAC committie based on the number research scholar with RAC memebrs and other rules of IIMK		
67	System should be able to assign supervisors/guide and RAC to Phd Students		
68	System should be able to notify PhD student and all RAC members on allotment or re-allotment of supervisors/guide and RAC members		

69	System should be able to allow student/faculty to request for change of supervisors/guide / RAC members based on certain circumstances to be sent for approval to Area chair and FPM chair		
70	System should be able to manage research plans for each of the Phd Student		
71	Facility to process student requests for changes in research plans for approval from supervisors/guide , RAC and then Area chair		
72	Enable students to submit progress report at the end of term (six months)		
73	Facility for Supervisor , RAC and FPM chair to make recommendations on the progress reports		
74	Facility for student to submit approval for submisiion of conference / seminar / Journal paper through work flow and facility for Supervisor , RAC and FPM chair to approve or reject the same		
75	Facility for student to submit approval for outside research / field work through work flow and facility for Supervisor and FPM chair to approve or reject the same		
76	Facility for student to submit approval forTA/DA for outside research / field work through work flow and facility for Supervisor and FPM chair to approve or reject the same		
77	Ability to capture the publication information submitted by students and link it to faculty profile		
78	System should be able to manage research time submissions by students		
79	Enable students to submit or resubmit (after corrections) synopsis / Research Proposal for approval to supervisors/guide , RAC and Area chair and FPM chair HoD		
80	Facility for supervisor, RAC, Area chair and FPM chair to approve Synopsis submission with comments/changes suggested (if any)		
81	Facility to capture the details of Research Advisory committee (RAC)		
82	Facility for FPM ofice to make a porposal for Thesis Advisory committie(TAC) through a work flow		
83	Facility for approval of TAC		
84	Facility for FPM office to make a porposal for open presentation date with approvals		
85	Facility for FPM ofice to make a porposal for Panel of Examiners through a work flow		
86	Facility for approval of panel of examiners		
87	Facility to send reminders to examiners before the scheduled date		
88	Enable supervisors to upload PhD Viva related schedule		
89	Facility for students to submit thesis for evaluation or resubmit corrected thesis post comments from TAC		
90	System should enable supervisors/guide to enter evaluations for thesis submitted along with examiner details and comments		
91	Workflow to process reviews and approvals from FPM chair on thesis submitted to supervisors		
92	Facility for FPM students to "Request for Extension of Program through work flow		
93	System should enable Supervisor and FPM Chair to approve extensions to research program		
94	Ability to assign students for TA/RA ship to supervisor by Chairman, FPM		

95	Ability to approve TA/RA ship		
IX	**FPM - Assesment - Assesment / Grading**		
96	Should provide a self-service gradebook for course faculty and academic associates and research guide to enter marks / grades		
97	Provide maker-checker facility for entering marks and approval by respective Faculty		
98	Facility for FPM cordinator and associate to take FPM rosters and grade reports		
99	Able to automatically notify relevant faculty for FPM courses when the submission dates for their courses are forthcoming through email , sms and portal		
X	**FPM - Assesment - Grade Processing**		
100	Facility to define IIMK rules and regulations for level or term or yearly Progressions		
101	Enable programmes administrators to enter parameters and respective weightages for final grades and research / thesis grades		
102	Facilty for faculty / Academic associate / staff to enter/upload marks for students, however the final grades should be visible to students after final progression and approval		
103	System should restrict grade change post final grades calculation		
104	Facility to display audit trails showing course,grade option, grade, or credits changes made to a student's academic record in such a way that students see only the latest grades / marks for each course (i.e. when a grade change is done, students see the later grade not the grade which was changed)		
105	Log of all grade changes made to a student's academic history records should be kept in the system		
XI	**FPM - Assesment - Results Declaration**		
106	Facility for students to view their grades for course work online in Students self Service Portal. Faculty and Concerned staff also to have the facility for viewing		
107	Facility for students to view their Research proposal grades online in Students self Service Portal. Faculty and Concerned staff also to have the facility for viewing		
XII	**FPM - Assesment - Award of FPM degree**		
108	Ability to set configurable IIMK rules needed for garduations.		
109	Facility to produce a list of FPM students potentially eligible for graduation for a term		
110	Ability to provide a mechanism to readily determine whether or not students have met program requirements		
111	Enable students to pay convocation fees through FPM self-service Portal		
112	Facility to schedule graduation ceremonies and maintain information on attendance and also manage student guests.		
113	Ability to automatically inactivate the student record after convocation for graduating students and for students who have completed their programs		
114	Facility for reports in hard copy and soft copy to the Alumni Office regarding graduated students, in a format specified by the Alumni Office. This data is to be updated in Alumini data base		

ID	System Functionality - Directors Dash board	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Director's Dashboard- General**		
1	Director's Dashboard should be accessible from all devices- Laptop , Desktop , mobile , ipad etc and should be very user friendly and with good look and feel		
2	Director's Dashboard should be integrated with Faculty Appraisal system , Accredtion systems, Students feedback system , Faculty Credit management system, Library Management system , Applications like elective biddings etc , work flows like leave request, travel booking ,etc and Learning Management System - Moodle		
II	**Director's Dashboard**		
3	System should have provision for all approvals		
4	System should enable to view Fund and portfolio , investment details		
5	System should enable to view Student's Feedback score on Courses taught		
6	System should enable to view Faculty appraisal		
7	System should able to generate reports from academic systems		
8	System should able to view placement details		
9	Able to view all key academic and Admin MIS reports		
9	**Detailed design of dash board will be finalised during Business Blue print stage**		

ID	System Functionality - Deans Dash board	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Dean's Dashboard- General**		
1	Dean's Dashboard should be accessible from all devices- Laptop , Desktop , mobile , ipad etc and should be very user friendly and with good look and feel		
2	Dean's Dashboard should be integrated with Faculty Appraisal system , Accredtion systems, Students feedback system , Faculty Credit management system, Library Management system , Applications like elective biddings etc , work flows like leave request, travel booking ,etc and Learning Management System - Moodle		
II	**Dean's Dashboard**		
3	System should have provision for all approvals related to respective Dean namely Dean (Academic Admin), Dean (RI), Dean (External Programs)		
4	System should enable to view Fund and portfolio , investment details		
5	System should enable to view Student's Feedback score on Courses taught		
6	System should enable to view Faculty appraisal		
7	System should able to generate reports from academic systems		
8	System should able to view placement details		
9	Able to view International Relations and Research Publications data		
10	Able to view all key academic and Admin MIS reports		
11	**Detailed design of dash board will be finalised during Business Blue print stage**		

ID	System Functionality - CAOs Dash board	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Chief Administrative Officer - CAO's Dashboard- General**		
1	CAO's Dashboard should be accessible from all devices- Laptop , Desktop , mobile , ipad etc and should be very user friendly and with good look and feel		
2	CAO's Dashboard should be integrated with Faculty Appraisal system , Accredtion systems, Students feedback system , Faculty Credit management system, Library Management system , Applications like elective biddings etc , work flows like leave request, and travel booking		
II	**CAO's Dashboard**		
3	System should have provision for all approvals related to CAO		
4	System should enable to view Staff appraisal		
5	System should able to generate reports from admin system		
6	Able to view Admin functions like Finance, HR, Payroll, Procurement, Logistics and Asset Accounting MIS reports		
7	**Detailed design of dash board will be finalised during Business Blue print stage**		

ID	System Functionality - Functional chairs Dash board	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Functional Chair's Dashboard- General**		
1	Functional chair's Dashboard should be accessible from all devices- Laptop , Desktop , mobile , ipad etc and should be very user friendly and with good look and feel		
2	Functional Chair's Dashboard should be integrated with Faculty Appraisal system , Accredtion systems, Students feedback system , Faculty Credit management system, Library Management system , Applications like elective biddings etc , work flows like leave request, travel booking ,etc and Learning Management System - Moodle		
II	**Functional Chair's Dashboard**		
3	System should have provision for all approvals related to respective functional chairs		
4	System should enable to view Financial MIS related to his function		
5	System should enable to view Student's Feedback score on Courses in his areas		
6	System should enable to view Staff appraisal. This is restricted to staff working in his functional area		
7	System should able to generate reports from academic systems		
8	System should able to view placement details		
9	Able to view International Relations and Research Publications data		
10	Able to view all key academic and Admin MIS reports		
11	**Detailed design of dash board will be finalized during Business Blue print stage**		

ID	System Functionality - Area chairs Dash board	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Area Chair's Dashboard- General**		
1	Area chair's Dashboard should be accessible from all devices- Laptop , Desktop , mobile , ipad etc and should be very user friendly and with good look and feel		
2	Area Chair's Dashboard should be integrated with Faculty Appraisal system , Accredtion systems, Students feedback system , Faculty Credit management system, Library Management system , Applications like elective biddings etc , work flows like leave request, travel booking ,etc and Learning Management System - Moodle		
II	**Area Chair's Dashboard**		
3	System should have provision for all approvals related to respective Area chairs		
4	System should enable to view Student's Feedback score on Courses in his areas		
5	System should enable to view Staff appraisal. This is restricted to staff working in his functional area		
7	System should able to view placement details		
8	Able to view International Relations and Research Publications data		
9	Able to view all key academic and Admin MIS reports related to his area		
10	**Detailed design of dash board will be finalized during Business Blue print stage**		

ID	System Functionality - Faculty Self Service Portal	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Faculty Service Portal - General**		
1	Faculty Self Service Portal should be accessible from all device - Laptop , Desktop , mobile , ipad etc and should be very user friendly and with good look and feel		
2	Faculty self service portal should be integrated with Library Management system , Applications like elective biddings etc , work flows like leave request, travel booking ,etc and Learning Management System - Moodle		
II	**Faculty Service Portal - Admin (to be done Portal Admin)**		
3	System should enable authorized user to set and modify the start and end date of application window for each program		
4	Manage Personal Profile of address, Visa, Passport, Communication, Dependents and all personal data, faculty educational background, teaching experience, professional experience, area of specialization, areas of interest etc.		
III	**Faculty Service Portal - Users**		
5	System should have provision for updating and approve each term's schedule , grade and documents for Different Programmers like PGP, EPGP etc. The grade should be published only after approval from faculty member.		
6	System should enable Faculty to access their personal, academic, address details, bank details, pay slip , all benefits like PF , loan , PF / Gratuity nominations, all payments , travel data , LTC status, leave status, FDF, PDF, Conference Grant, Activity Credits, Publications, and other grants real time data through self-service		
7	System should enable Faculty to view their class calendar, class detail , schedule, location		
8	System should enable Faculty to query and take report of their accounts and transactional activity and account balances real time		
9	System should enable Faculty to submit online request for certificates different types of certificates from Admin such proof of residence, salary, NOC etc through workflow integrated to portal		
10	System should enable Faculty to view student feedback score of courses taught		
11	System should enable students to view marks/grades obtained in each component / subcomponent of every course		
12	Access Wikis and Forums , Update class notes ,Access to Moodle for conducting online assessments		
13	System should be able to maintain attributes about the faculty member such as department chairperson, dean, board memberships, awards, part-time/full-time, publications etc.		
14	System should enable faculty to check the status of various funds available to faculty (FDP), project funds, remuneration for teaching short term courses (ePGP,MDP) etc.		

15	System should enable faculty to view their calendar which includes teaching and non-teaching activities		
16	System should enable faculty to apply for leave ,FDP fund, medical claim, Travel claim etc through workflow		
17	System should be able to send regular updates to students in		
18	case of cancellation of classes owing to unavailability of faculty		
19	System should enable faculty and academic associates to submit component wise grades online		
20	System should enable faculty to view course feedback score only after submission of grades of respective courses		
21	System should enable faculty to view student information and all Academic Performance Reports such as bio-demographic, transcript, grades, holds, test scores, degree audit and current schedule		
22	System should be able to allow individual faculty to capture the achievements / tasks / etc through out the year. A few of them can be captured at source from MDP , e PGP against which credits are earned through out the year. (system should be open through out the year to capture this data		
23	System should have option for immediately monetise the extra payments , credits for teaching or accumulating the credit points as per the policy		
24	system to have option to view the credit points in various categories such as teaching, research, administration, etc.		
25	System to have facility for updating and viewing the details of publications, conference presentations, cases, and accumulate the applicable credits		
26	Facility for updating the details of the teaching and the associated credits		
27	Should integrate Integrate with existing portals such as PGP, FPM, research etc.		
28	System should be able to view Social Dep't. Projects, BPPs,		
29	System to have workflow for making request for External course, talk, committee membership		
30	system should have facility for requesting approval for attending conference, seminar and workshops utlizing FDF or conference grant		
31	system should have facility for requesting approval for Travel allowance		
32	system should have facility for requesting approval for LTC online		
33	System should have option to submit medical claims online		
34	System should have option for requesting approval for foreign travel		
35	System should have facility for submitting various requests like quarter allocation , transport ,welfare scheme application etc. as per Annexure		
36	System should have provision to submit Assets & Liabilities statement online. While new years statement previous years can be displayed and relevant current years data can picked up from old one		
37	Should have facility for submission of nominations for PF and gratuity online		
38	should have provision for submissions of applications for repayable / non repayable withdrawls from Voluntary contribution of PF online		
39	system should have provision to submit expense statement online and also to enquire the status		

ID	System Functionality - Student Self Service Portal - PGP	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Student Self Service Portal - General**		
1	Students Self Service Portal should be accessible from all device - Laptop , Desktop , mobile , ipad etc and should be very user friendly and with good look and feel		
2	Student self service portal should be integrated with Library Management system , Applications like elective biddings etc , work flows like certificate request, performance report etc ,Learning Management system Moodle and Payment gateway for fees and other payments		
II	**Student Self Service Portal - Admin**		
3	System should enable authorized user to set and modify the start and end date of application window for each program		
4	Manage Personal Profile of address/Visa/Passport/Communication /Education & Employment		
5	Provision for creating , updating and viewing Mentoring data		
6	System should enable staff to query and take report of accounts and transactional activity of students and account balances real time		
7	Facility to enforce rules for eligibility of certain programs to avoid any administrative errors during registration of students		
8	Provision for Updating each term's data and documents		
III	**Student Self Service Portal - User**		
9	Should enable students to access their personal, academic and financial records (e.g. financial data, class schedule, time table and unofficial transcript) through self-service		
10	Should should enable students to view their class calendar, class detail , schedule, location		
11	System should be able to provide view their account information, and make online payments through self-service component and these payments to be automatically reflected on the student accounts for a		
12	Facility for online payment for fees and other misc. charges and print receipt for the same		
13	Students should be able to access an electronic view of their billing statements.		
14	Enable students to submit online request for certificates like Bonafide, NOC , Academic performance report, leave, repeat exam, attendance		
15	Enable students to submit feedback for courses attended		
16	Facility for students to view final grades only after submission of feedback for all attended courses		
17	Enable students to view marks/grades obtained in each component / subcomponent of every course		
18	System should have facility for students committee members to make request for gate pass , advance payment, permissions, room booking for PGP , MDP and other approvals through Work flow.		
19	Complaints/ Suggestion Portal for students to submit Complaints / Grievance and suggestions		

20	Payment portal should include all student billing including AC , Geyser etc		
21	A Notification area to be maintained in the common area of the portal . All the major announcement and notifications like academic calendar, time table , exam , hostel communications etc to be updated here.		
22	The billing data view should be elaborate and should include all the details like mess expenditure deductions , kiosk bills etc		
23	The monthly mess account balance also to be displayed in the portal		
24	Facility to view insurance details, policy and card details		

ID	System Functionality - Student Self Service Portal - EPGP	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Student Self Service Portal - General**		
1	Students Self Service Portal should be accessible from all device - Laptop , Desktop , mobile , ipad etc and should be very user friendly and with good look and feel		
2	Student self service portal should be integrated with Library Management system , Applications like elective biddings etc , work flows like certificate request, performance report etc ,Learning Management system Moodle and Payment gateway for fees and other payments		
II	**Student Self Service Portal - Admin**		
3	System should enable authorized user to set and modify the start and end date of application window for each program		
4	Manage Personal Profile of address/Visa/Passport/Communication /Education & Employment		
5	Provision for creating , updating and viewing Mentoring data		
6	System should enable staff to query and take report of accounts and transactional activity of students and account balances real time		
7	Facility to enforce rules for eligibility of certain programs to avoid any administrative errors during registration of students		
8	Provision for Updating each term's data and documents		
III	**Student Self Service Portal - User**		
9	Should enable students to access their personal, academic and financial records (e.g. financial data, class schedule, time table and unofficial transcript) through self-service		
10	Should should enable students to view their class calendar, class detail , schedule, location		
11	System should be able to provide view their account information, and make online payments through self-service component and these payments to be automatically reflected on the student accounts for a comprehensive account by account analysis showing a student's account balance, missing financial aid amounts, missing payments or portions of payments, and ending balance.		
12	Facility for online payment for fees and other misc. charges and print receipt for the same		
13	Students should be able to access an electronic view of their billing statements.		
14	Enable students to submit online request for certificates like Bonafide, NOC , Academic performance report, leave, repeating exam, attendance update, clearance certificate , medical application , MDP booking etc through workflow integrated to portal. The approval process for each work flow to be followed as per IIMK procedures		
15	Enable students to submit feedback for courses attended		

16	Facility for students to view final grades only after submission of feedback for all attended courses		
17	Enable students to view marks/grades obtained in each component / subcomponent of every course		
18	System should have facility for students committee members to make request for gate pass , permissions, room booking and other approvals through Work flow.		
19	Complaints/ Suggestion Portal for students to submit Complaints / Grievance and suggestions		
20	A Notification area to be maintained in the common area of the portal . All the major announcement and notifications like academic calendar, time table , exam , hostel communications etc to be updated here.		

ID	System Functionality - Student Self Service Portal - EPGP	Bidder's Solution - Configuration (CO) /Customization(CU)/ Application and Integration (BA)/ Cannot be met (NC)	Bidders Remarks
Student Self Service Portal - General			
1	Students Self Service Portal should be accessible from all device - Laptop , Desktop , mobile , ipad etc and should be very user friendly and with good look and feel		
2	Student self service portal should be integrated with Library Management system , Applications like elective biddings etc , work flows like certificate request, performance report etc ,Learning Management system Moodle and Payment gateway for fees and other payments		
Student Self Service Portal - Admin			
3	System should enable authorized user to set and modify the start and end date of application window for each program		
4	Manage Personal Profile of address/Visa/Passport/Communication /Education & Employment		
5	Provision for creating , updating and viewing Mentoring data		
6	System should enable staff to query and take report of accounts and transactional activity of students and account balances real time		
7	Facility to enforce rules for eligibility of certain programs to avoid any administrative errors during registration of students		
8	Provision for Updating each term's data and documents		
Student Self Service Portal - Admin			
9	Should enable students to access their personal, academic and financial records (e.g. financial data, class schedule, time table and unofficial transcript) through self-service		
10	Should enable students to view their class calendar, class detail , schedule, location		
11	System should be able to provide view their account information, and make online payments through self-service component and these payments to be automatically reflected on the student accounts for a comprehensive account by account analysis showing a student's account balance, missing financial aid amounts, missing payments or portions of payments, and ending balance.		
12	Facility for online payment for fees and other misc. charges and print receipt for the same		
13	Students should be able to access an electronic view of their billing statements.		
14	Enable students to submit online request for certificates like Bonafide, NOC , Academic performance report, leave, repeat exam, attendance update, clearance certificate , medical application , MDP booking etc through workflow integrated to portal. The approval process for each work flow to be followed as per IIMK procedures		

15	Enable students to submit feedback for courses attended		
16	Facility for students to view final grades only after submission of feedback for all attended courses		
17	Enable students to view marks/grades obtained in each component / subcomponent of every course		
18	System should have facility for students committee members to make request for gate pass , advance payment, permissions, room booking for PGP , MDP and other approvals through Work flow.		
19	Complaints/ Suggestion Portal for students to submit Complaints / Grievance and suggestions		
20	Payment portal should include all student billing including AC , Geyser etc		
21	A Notification area to be maintained in the common area of the portal . All the major announcement and notifications like academic calendar, time table , exam , hostel communications etc to be updated here.		
22	The billing data view should be elaborate and should include all the details like mess expenditure deductions , kiosk bills etc		
23	The monthly mess account balance also to be displayed in the portal		
24	Facility to view insurance details, policy and card details		
25	Facility to view the the stipend / assistance and other monetary benefits , relevant tax benefits provided to FPM students		
26	Facility for student to apply for reimbursement of contingency, computer, international conference expenses etc. through work flow.		
27	Facility to view the credit and debit account of student's contingency, computer and international conference account till their complete tenure		

ID	System Functionality - Staff Self Service	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Staff Service Portal - General**		
1	Staff Self Service Portal should be accessible from all device - Laptop , Desktop , mobile , ipad etc and should be very user friendly and with good look and feel		
2	Staff self service portal should be integrated with Library Management system , Applications like elective biddings etc , work flows like leave request, travel booking etc and Learning Management System Moodle		
II	**Staff Service Portal - Admin**		
3	System should enable authorized user to set and modify the start and end date of application window for each program		
4	Manage Personal Profile of address, Passport, Communication, Dependents and all personal data, faculty educational background, work experience, professional experience, departments worked , career history etc.		
III	**Staff Service Portal - User**		
5	Provision for Updating each term's schedule , grade and other documents by concerned staff		
6	System should enable Staff to access their personal, academic, payroll , all benefits like PF , loan , all payments , travel data , FDP and other grants real time data through self-service		
7	System should enable concerned staff to view their class calendar, class detail , schedule, location		
8	System should enable concerned Staff to query and take report of accounts and transactional activity of Faculty and account balances real		
9	System should enable staff to submit online request for certificates like NOC , etc through workflow integrated to portal		
10	System should enable concerned staff to view marks/grades obtained in each component / subcomponent of every course		
11	Update class notes ,Access to Moodle for conducting online assessments		
12	System should enable supporting staff to check the status of various funds available to faculty (FDP), project funds, remuneration for teaching short term courses (ePGP,MDP) etc.		
13	System should enable staff to view their calendar which includes teaching and non-teaching activities		
14	System should enable staff to view their class details, schedule and location		
15	System should enable staff to apply for leave , medical claim, Travel claim etc through workflow.		
16	System should be able to send regular updates to students in case of cancellation of classes owing to unavailability of faculty		
17	System should enable staff and academic associates to submit component wise grades online		
18	System should enable concerned staff to view student information and all Academic Performance Reports such as bio-demographic, transcript, grades, holds, test scores, degree audit and current schedule		

ID	System Functionality - Academic Admin	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future release(COE)/ Cannot be met	Bidders Remarks
Academic Administration			
1	Faculty Work load Norms : Compilation of year wise individual faculty workload (Integration of data from all sections/departments). Computation both in terms of credit and hours of work.		
2	Conferences: Automatic checking/verification of eligibility for attending National and International conferences as per norms – Institute funding – FDF - PDF		
3	Leave : Vacation :Auto updating leave, leave commutation, entitlement, vacation leave and personnel data. Integration with Leave Management system		
4	EOL and Sabbatical Leave : Auto verification of eligibility for EOL and Sabbatical leave.		
5	Research Papers and Projects : Auto tracking of progress of research papers and projects against laid down time stipulations, especially those having financial implications, ie, funded projects like SGRP, MGRP and LGRP.		
6	Incentive Scheme : Ability to track, record credits/payments, monitors and check eligibility for incentive schemes to include FDF and PDF		
7	Faculty Exchange Scheme : Auto verification eligibility and selection for faculty exchange schemes.		
8	LTC/Transport Allowance/ CEA/HRA/ and other admissible allowances: Auto check entitlement and eligibility for the same		
9	Compilation on qualification, experience and individual accomplishments of faculty. Ability to summarise the same across a particular period.		
10	Recruitment – eligibility criteria - Pay details – Movement to higher Academic Grade pay		
11	Promotion/Increments: Ability to auto generate reminders and formats for according promotions and increments as and when due.		
12	Faculty Data: Maintain data on regular, visiting/contract, guest, Adjunct faculty. Compile data across areas and period of time.		
13	Maintain and update data on basic and additional qualifications of faculty and areas of specialisation .		
14	Record of No of articles published in Journals(National/International), Book chapters, book reviews, conference proceedings, presentations conducted, working papers published, research projects undertaken, conference sessions chaired and attended in India and abroad, research seminars /workshops attended, case studies published and other related works.		
15	Faculty members visited academic institutions abroad and number of faculty visited the Institute from abroad. Institutional membership with professional bodies in Indian as well as abroad, separately. Experience in years in industry and academics. Ph.D. from foreign / IIT-IIMs/ or Other Indian Universities		
16	Institutional Membership – Indian & Foreign		
17	Station Leaving permission. Workflow		

18	Faculty Travel approval/ plan. Workflow		
19	External lecture/ talks/ process automation		
20	Work at home - approval process		
21	Quarterly Self-Appraisal of Faculty - to be part of HR		
22	Faculty Recruitment process - Recruitment- Application, review		
23	Faculty - Probation Clearance, promotion etc		
24	Foreign faculty members		

ID	System Functionality - Alumni	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Alumni - Portal**		
1	A Separate Portal for Placement. The portal to be available in all devices Web , ipad , mobile		
II	**Alumni - General**		
2	Ability to create and maintain Alumni Master		
3	Ability to Updating of the personal records by the Alumni		
4	Ability to manage city wise alumni chapters		
5	Ability to manage batch wise data		
6	Ability to enter details of passing out students in every batch		
7	Ability to generate reports for various functional areas in the institute such as admissions, pgp and placements. These reports may be generated city-wise, company-wise, batch-wise etc.		
8	Ability to manage invitations for various alumni programs		
9	Ability to store and retrieve reports, photographs and videos of alumni programs		
10	Ability to manage reports and minutes of meetings of alumni committee.		

ID	System Functionality - Directors office	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Directors office**		
1	Maintaining Record of all Minutes of the Meeting (MOM) for Board Meetings		
2	Providing access of MOM's to relevant stake holders		
3	Should provide a place to consolidate all the MOM documents, which can be later on searched also, keeping intact the security on the documents		
4	Facility for displaying Directors Notice/Memo / Message display on the Faculty, students Self-service Portals, Alumni , MDP and other Portals		
5	Should provide document, field and item level security and access control		
6	Dashboard for the Director to monitor key activities		
7	Approval of Workflow of Departments		
8	Consultancy offer from different places, Distribution of proposal to faculties, Consent for the consultancy from IIM Kozhikode, Consent/approval from the party, Consultancy Assignments Approval, Circulation of Query from Clients to Faculty, Forwarding of Fresh Proposals to Clients, Consultancy Training Assignments Approval		
9	Faculty Movement for Consultancy/Lecture		
10	Guest/External Lecture Records		
11	Status Report/Summary of Projects		
12	Ongoing Projects/CT Statements		
13	Approval Guidelines of Various Activities		
14	Facility for approval of PGP/EPGP/MDP Honorarium		
15	Work Flow approvals like Administrative approval for Library purchases, Administrative approval for PGP/EPGP/MDP Honorarium, etc		
16	Status of Projects, External Lectures		
17	Maintain faculty records in various categories – full-time faculty, guest faculty, peer institutes for exchange.		
18	Ability to track competency and qualification of each faculty member		
19	Ability to track faculty recruitment and selection		
20	Ability to track faculty workload		
21	Ability to manage faculty exchange Programmes		
22	Ability for student and faculty to collaborate online		
23	Ability to track collaboration with other institutes		
24	Ability to track Faculty Schedule		

25	Facility to view Research activities of faculty		
26	View and monitor organizations for external funded research		
27	Facility for viewing and approving Internal Research		
28	Facility to view and monitor Faculty Development Fund utilization		
29	Details related different types of Publication awards		
30	View and maintain Extra Ordinary Leave and sabbatical leave for Faculties		
31	Monitoring all academic activities at Kochi campus		
32	Maintain faculty records in various categories – full-time faculty, guest faculty, peer institutes for exchange at Kochi campus		
33	Approval Guidelines of MDP at Kochi campus		
34	Detailed design of dash board will be finalised during Business Blue print stage		

ID	System Functionality - Engineering	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
Engineering			
1	Project Types		
2	Funding Agency		
3	Pay Head Master		
4	Existing Project Information		
5	Vendor Master		
6	New Equipment Request		
7	Supply, Goods Receive Note, Goods Issue Note		
8	Project List, Project Information, Project Proposal, Project PIN Allocation, Project Information sanction, Project Staff Information, Project Post Upgradation		
9	New Constructions		
10	Work Order system		
11	New construction Projects		
12	View Construction Projects		
13	Tender		
14	Tender Registration		
15	Tender Advertisement		
16	Tender Issue		
17	Tender Receive		
18	Tender Estimations		
19	Tender Comparison		
20	Lodge Complaints, Complaint Register, Processing Complaints, Complaints Approval, Work Completion of Complaints		
21	Building Details		
22	Procurement		
23	Temporary Advance		
24	Bill settlement		

ID	System Functionality - RTI	Bidder's Solution - Configuration (CO)/ Customization(CU)/ Application and Integration (BA)/ Third Party solution (BA)/ Future Release (COF)/ Cannot be met (NC)	Bidders Remarks
I	**TRANSPORT & GUEST HOUSE**		
1	Details of all vehicle to be included such model, type (light/heavy),seating capacity, company, purchase details, total cost of purchase etc		
2	Details of documents to be maintained with the vehicle (such as RC book, pollution certificate, insurance details, fitness certificate, road tax, permit validity details etc and the status of each document (showing the expiry dates of each document) : reminder for the same to be included		
3	Details of maintenance of vehicles such as periodic servicing, repairing, cost etc		
4	Vehicle requisition as per approved format		
5	Submission of Vehicle requisition approval as per channel : General Administration including library & computer centre SAO (GA) Academic Administration (PGP/EPGP/FPM/Admissions/Faculty) SAO (AA) (PGP/EPGP/FPM/Admissions/Faculty		
6	Assigning vehicles based on requests (Institute vehicles/Hired Vehicles)		
7	Details of vehicle arrangement such as driver name, contact number, type of vehicle etc		
8	Details of fuel consumption for each vehicle and entry of fuel refilling (such date, type of fuel, quantity, cost etc) and mileage calculator		
9	Details of purchase of additional items for vehicles such CD players, perfume, seat covers, towels etc		
10	Details of issue of vehicle pass (Name of person, 4 wheeler/2 wheeler, registration details, date of issue etc)		
II	**Guest House**		
11	Guest house details with status of rooms such as single/double with attached bathroom or not		
12	Details of caretaker such as name, mobile number etc		
13	Details of items (inventory list) available in guest houses such furniture's, electronic equipments, toiletry items etc		
14	Submission of accommodation booking form as per channel General Administration including library & computer centre SAO (GA) Academic Administration (PGP/EPGP/FPM/Admissions/Faculty) SAO (AA) (PGP/EPGP/FPM/Admissions/Faculty)		
15	Online view of room availability		
16	Online view of room allotment details		
17	Intimation regarding room allotment/non availability of rooms to the concerned		
18	Details of guests accommodated in guest house		
19	Details of payment collected from guests		
20	Details of suggestion/complaint		
21	Online intimation to engineering section for maintenance request		
22	Details of purchase of items for guest house (item description, quantity, address of shop, location etc)		

23	Details of payment paid to laundry, newspaper and other vendors		
24	Details of procurement of kettle items such as everyday creamer, soap, coffee, sugar etc) and their consumption details		
25	Maintenance Works		
III	**ESTATE**		
26	Day to Day Repairs and Maintenance Works in the Institute		
27	Gate passes system for taking the materials outside IIMK		
28	Complaints and Suggestions		
29	**Allotment of residential accommodation** - Quarters		
30	Allotment of space to commercial establishments and revenue realization.		
31	Issue of passes to mobile vendors.		
32	Auction of unserviceable materials released from all units of the Institute		
33	Sanitation		
34	Legal cases related to estate.		
35	Monitoring the prevention and removal of encroachments with the help of local law and order authorities, removal of lessee, monitoring of recovery of dues, safe custody of records, etc.		
36	Initiate action for bidding, land allotment, inspection of sites, recovery of land related revenue		
IV	**Security Management**		
37	Contract terms and conditions		
38	Security staff appointments through contracts		
39	Security duty allocation register		
40	Security duty attendance register		
41	Security contract payment requests		
42	Security contract payment request approval		
43	Security contract payments		
44	Record of incidences		
45	Leave record		
46	Over time duty record		
V	**DISPATCH**		
47	Facility to collect internal currier for dispatch and delivery details		
48	Facility to receive External currier for distribution and delivery details		
49	Speed post collection and dispatch		
50	Speed post receiving and distribution		
51	Facility for international mail services		
52	Handling of registered letters (incoming and outgoing)		
53	Ability to raise bill against the individuals/departments		
54	Ability to make payments to outside parties for currier/speed post/registered post		
55	Ability to store details of undelivered items		
56	Franking Machine Management		

ID	System Functionality - Student Information System - Hostel Management	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Hostel**		
1	Ability to store various hostels and houses		
2	Ability to store prior housing assignments		
3	Ability to charge students accommodation and facilities		
4	Ability to interface room billing to students account receivable		
5	Ability to bill students for damages		
6	Ability to record students late arrival		
7	Ability to charge laundry service on students accounts		
8	Maintain Student Information		
9	Master for Hostels and Rooms		
10	Allocation of Rooms		
11	Facility for Room Transfer		
12	Allocation of Inventory (Chairs, Tables) to different rooms		
13	Guest room allocation and billing		
14	Fine collection for damaged items		
15	Room maintenance requisition and approval		
16	Process to append/ update the hostel information		
17	Process to maintain the hostel extra capacity		
18	Process to maintain the wing information of different hostels details		
19	Process to maintain the guest category master		
20	Ability to allot hostel to PGP / FPM students		
21	Ability to generate hostel allotment letter		
22	Ability to allot hostel room to a student who has been allocated hostel		
23	Ability to allot hostel to the guests. Guest can come and stay in the hostels/IIM Guest House		
24	Ability to receipt fees and room allotment to a guest who may or may not have booked hostel in advance		
II	**Hostel- Fees**		
25	Process to maintain the fee components against which fees are deposited in hostel		
26	Process to maintain mess fee under different components		
27	Process to enter hostel fees for a student in IIM Kozhikode		
28	Process to generate bank statement		
29	Process to enter the details of mess rebate rule		
30	Process to enter the details of mess rebate and exemption for a student in a particular semester.		

31	Process to enter / update dining days 'from' and 'to' of a student in IIMK hostel/guest house for a particular semester		
32	Process to finalize dining days of a student in IIMK hostel		
33	Process to enter the different types of other charges applicable to a student who has his name in dining days of the hostel		
34	Process to enter details of hostel other charges applicable to a student in the hostel		
35	Process to calculate the mess dues of the students who are enrolled in the dining days of the hostel's mess for a particular semester account period which closed		
36	Process to finalize the hostel mess dues. The dues are calculated by the system for each semester		
37	Process to calculate hostel mess dues in the middle of mess accounting period		
38	Process to update the fees status in the system as per the updated text file received from the bank		
39	Process to generate the fee receipt to be given to the hostler against the deposition of hostel fee/dues		
40	Process to add 'other charges category'		
41	Process to updating dues to be paid by the student once it has been calculated		
42	Process to calculate charge per day of the hostel's mess for a particular semester account period		
III	**Hostel - Accounts**		
43	Process to enter details of hostel financial period		
44	Process to maintain the details of mess accounting period		
45	Process to maintain accounts centers for hostel accounts		
46	Process to enter the details of account group		
47	Process to maintain the account heads for hostel accounts		
48	Process to enter the details of bank accounts of students		
49	Process to prepare the payment voucher against the bills whose details are entered in the system		
50	Process to enter the details of hostel credit bill generation		
51	Process to accept the credit bill by a hostel, raised by another hosted		
52	Hostels do various kinds of transactions between each other		
53	Process to enter receipt / payment bills details for which are not entered in the system		
54	Process to prepare the bill for the advance money given to an employee		
55	Process to enter the details of adjustment of advance amount received by an employee of the hostel		
56	Process to enter subsidies details		
57	Process to generate honorarium payments		
58	Process to settle the expenditure, which is to be shared by all the hostels		
59	Process to enter subsidies details		
60	Process to generate honorarium payment		
61	Process to settle the expenditure, which is to be shared by all the hostels		
62	Ability to add students to the free messing category		

63	Ability to generate of the credit bills that are to be generated for free messing		
64	Ability to manage honorarium master information		
65	Process to verify honorarium amount		
66	Process to refund guests		
67	Process to generate bills for daily wages workers		
68	Process to generate journal vouchers		
69	Process to add bank accounts to a hostel account center		
70	Process to generate cheque number and print		
71	Process to generate debit advice and print		
IV	**Hostel - Exit / Checkout**		
72	Process to enter the details of Hostel Transfer of student		
73	Process to enter the details of student exit from his hostel		
74	Process to enter the details of guest leave from hostel		
75	Process to enter the details of student rejoining his hostel		
76	Process to give Final No Dues to the student who is leaving the hostel permanently		
77	Process to enter mess security refund application		
78	Ability to adding exit reasons for student Exit		
V	**Hostel - Stock**		
79	Process to enter the details of Item Category in the Hostel Stock management systems		
80	Process to enter the details of Item Category in the Hostel Stock management systems		
81	Process to enter the details of Unit in the Hostel Management System		
82	Process to enter the details of bill		
83	Process to enter the details of challan		
84	Process to verify the details of stock by accountant once the items are received		
85	Process to verify the details of Hostel Mess Bill by Auditor, Student affairs section		
86	Process to enter the details of Items issued in the Hostel Mess		
87	Process to verify the details of stock by accountant once the items are received		
88	Process to enter the details of the stock transfer details of one hostel to another hostel		
VI	**Hostel - General**		
89	Process to maintain the details of disciplinary actions taken against a student		
90	Process to enter the details of the event of the hostel Calendar		
91	Process to update the details of various types of assets/items in a hostel		
92	Process to enter the details of Hostel Inventory Item Issued in the IIMK Hostel like TV, Table etc.		
93	Ability to Lodging Complaint/Request to Caretaker for facilities available in the room		
94	Ability to Viewing and attending the complaints and request lodged for - Caretaker		

ID	System Functionality - INTERNATIONAL EXCHANGE OF STUDENTS AND FINANCIAL AID/AWARD/ SCHOLARSHIP	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**International Relations - Portal**		
1	A Separate Portal for International Relations. The portal to be available in all devices Web , ipad , mobile		
II	**International Exchange - Exchange students enrolling in foreign universities**		
2	Process to create or modify Exchange Programme		
3	Ability to manage exchange Programme notification		
4	Ability to manage application submission		
5	Ability to process applications		
6	Ability to initiation interview process		
7	Process to conduct interview for the applicants of the exchange Programme		
8	Process to generate the list of students selected for different exchange Programmes		
9	Ability to give approval to selected exchange students		
10	Ability to acceptance student form for exchange Programme		
11	Process to fill and send request for approval of tentative equivalence form		
12	Manage approval of equivalence form filled by student		
13	Ability to obtain clearance from IIMK before departure to the foreign university		
14	Ability to manage travel detail entry by student		
15	Process to approve equivalence form by Chairman students exchange		
16	Ability to manage credit entry of exchange student		
17	Ability to enter grade status of each student		
18	Ability to feedback form filled by student		
19	Ability for a student to accept form processing for the exchange Programme		
III	**International Exchange - Exchange students visiting IIMK**		
20	Ability to manage foreign institute student detail		
21	Ability to approve foreign students for exchange Programme		
22	Ability to manage visa details of foreign student		
23	Ability to request / approve for extension of visa		
24	Ability to manage formalities for completion of stay of foreigner student from IIMK		
25	Ability to mail official transcript		
IV	**Financial Aid / Award/ Scholarship**		
26	Manage financial aid & reward master		
27	Ability to set rules for financial aid & reward		
28	Ability to manage financial aid & reward master approval		
29	Ability to revise financial aid & reward master		
30	Ability to manage notification of application invited for financial aid & reward		

31	Ability to request student for financial aid & reward		
32	Ability to shortlist eligible candidates		
33	Ability to constitute interview committee by academic section		
34	Ability to accept income certificate		
35	Process to compile result of selection		
36	Ability to approve grant for financial aid & reward		
37	Ability to send intimation of award of donor financial aid & reward		
38	Ability to processing after IIM approval		
39	Ability to stop financial aid & reward after term withdrawal		
40	Ability to stop financial aid & reward for next term		
41	Ability to forward financial aid & reward for next term		

ID	System Functionality - Library System & Media Relations	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Library - Portal**		
1	A Separate Portal for Library. The portal to be available in all devices Web , ipad , mobile		
II	**Library System - General**		
2	Identity - Cum - Library Membership Cards (Students, Faculty & Staff)		
3	Inventory Management of Furniture and Equipments - can be part of ERP Asset Management system		
4	Track the external users/ visitors to Library & Information Center		
5	Track the visitors to the Indian Business Museum		
6	Library Budget Management System		
7	Electronic Resources Management System (ERMS) – Automation of the entire workflow (The Library subscribes to over thousands of E-Journals, around 75 electronic databases, and several e-resources		
8	Business Cases and Simulations – Automating the entire workflow		
9	Readings/Reference/Article requests – Workflow Automation		
10	Facillity for booking Reading rooms		
11	Library Advisory Committee' - workflow for its Recommendations, Decisions and Action etc		
11	Indian Business Museum: Management of assets, artefacts, equipments and maintenance		
III	**Library system - CASES & SIMULATIONS PROCUREMENT for students**		
13	Receipt of approval by Competent Authority, from the concerned department		
14	Indent Management		
15	Preparation of supply orders – to be processed through the HBS Publishing System		
16	Invoice Processing		
17	Tracking of Payment		
IV	**Media Relations**		
18	Management of Media Database – Local & National		
19	Ability to Upload the Documents to be Published		
22	Ability to View of the Documents and Change request		
21	Ability to View of the Documents and incorporating Change request		
22	Ability to Approve the Document		
23	Ability to Engage PR Agencies		
V	**Library System Integration**		
24	Library Management System (LMS) is based on KOHA open source software . LMS and Library Portal to be integrated with Faculty, Staff and Students Self service Portals		

ID	System Functionality - Placement	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
I	**Placement - Portal**		
1	A Separate Portal for Placement. The portal to be available in all devices Web , ipad , mobile		
2	Two different portal one for students, Faculty of IIMK and another one for Companies		
II	**Placement - Portal for Companies**		
3	Facility for displaying Placement calendar availability		
4	Facility for displaying placement policy		
5	Facility for Companies to Register for Placement		
6	Facility for Companies to make online payment for placement		
7	Facility for IIMK to accept or reject the company's request for Registration		
8	Facility for Companies to pay the Recruitment fees once placement is over		
9	Facility for Companies to upload presentations and other various documents		
10	Facility for Companies to Register for Summer Internship		
11	Ability for employer to upload evaluation form and grade after completion of summer training		
III	**Placement - Students**		
12	Online forms to be developed related to Summer & Final Placements : Placements Forms		
13	Communication / News bulletin are in the portal for students.		
14	Facility for displaying Placement calendar		
15	Facility for displaying placement policy		
16	Facility to view the placement requirement from various companies		
17	Facility to create Online approvals regarding the usage , Courier, Catering, Guest House Booking, & Transportation form by students council		
18	Provide the ability for students to rank the employer in order to select their preferences		
19	Placements needs to be integrated with student information system with a role based security		
20	Ability to see the placement requests send by various companies		
21	Ability to display area wise interest of companies		
22	Institutional Index to be developed wherein we get a clear picture about the history of various companies : Placements Database. Placement analytics and Reports to be developed form this database		
23	Facility for Online approvals regarding the usage , Courier, Catering, Guest House Booking, & Transportation form by students council for placement		
24	Attendance tracking is required for Placement / summer internship events		
25	The ability to charge students penalty for non-attendance to employer events		
26	Expense tracking to be developed for keeping track of various expenses related to Placements		
27	Intimation to students regarding the Incoming documents in Placements office		
28	Database to be developed for keeping track of Incoming documents		
29	Option to select students and send email to intimate them		

30	Ability to create a placement committee group to share minutes and collaborate		
31	Provide the ability for faculty to upload presentations and other various documents		
32	Ability for students to upload their CVs		
33	Ability for students to update their CVs		
34	Ability to make communication in portal , send notification to students,		
35	ability to assigning students for summer training		
36	Reports : List of shrt listed students company wise		
37	crashing out students from the list		
38	extending remaining students for further process		
IV	**Placement - Analytics and Reports**		
39	Facility for Reports and analytics on Placement Database		
40	Reports : List of short listed students company wise		
41	Area wise Placement reports		

ID	System Functionality - RTI	Bidder's Solution - Configuration (CO)/ Customization(CU)/ Application and Integration (BA)/ Third Party solution (BA)/ Future Release (COF)/ Cannot be met (NC)	Bidders Remarks
	Rights to Information Framework		
1	The RTI application first time goes to PIO requesting information related issues. The information should be provided by PIO within 30 days of the receipt on acceptance of RTI application. If the applicant is not satisfied by given answer of requested information then he can re-apply for RTI application with Appellate officer for the same information. Again if applicant is not satisfied by given answer of requested information then he can again apply to RTI Commissioner for the same. Proposed Solution The solution proposed should be web-based system to enable fast and effective information dissemination with proper checks and balances for accountability to effectively address - Rights to Information‖ service. It should support centralized RTI cell for multiple departments. The solution offered should be multi-lingual, multi-user offering following features:		
	a) Grievance Processing System		
2	Grievances can be registered with relevant papers attached to it. It will be routed automatically to the concerned authority. The following options should be provided to effectively aid grievance redressal process. The module should have following major functionalities.The solution proposed should be web-based system to enable fast and effective information dissemination with proper checks and balances for accountability to effectively address - Rights to Information‖ service. It should support centralized RTI cell for multiple departments. The solution offered should be multi-lingual, multi-user offering following features:		
3	i.Grievance Registration A unique ID to be generated for every grievance registered to enable easy tracking of the any grievance.		
4	ii.Grievance Receipt A grievance Receipt to be given to the aggrieved as a physical proof of having received the grievance.		
5	iii.Intimation of the Action Taken & Status Real-time details of Status, Action Taken, and Officer Remarks etc to be made available.		
6	iv.Grievance Redressal By auto-escalating the pending grievances, the system should make sure that no grievance goes unnoticed and help reduce grievance redressal time.		
7	v.Complaints Monitoring Various MIS reports & views should be created to monitor the status of Grievances.		
8	vi.Different Communication Modes to be Supported • By Fax/Phone/Postal mail/e-Mail • Through website • In Physical Form (In Person)		
	b) Application Redressal Systema) Grievance Processing System		
9	Applications of any Bureau/subject should be accepted through this system and routed to concerned officer for reply. Their scrutiny remarks/replies should be stored with the application with date & time stamp. Real-time information of the applications' status to be made available to all parties concerned. The module should have following major functionalities: •Application Registration •Application Receipt •Intimation of the Action Taken & Status •Application Redressal (Work flow) •Application Monitoring The applicant should have access so as to keep track of his/her application online anytime from anywhere		
	c) Query & Content		
10	All organizational circulars, memos, reference manuals etc should be stored digitally for a quick and easy referral. The following features should be provided: •Ready Reference Library of All Type of Content •Easy Parametric & Text based Search •Download/Print Documents		

ID	System Functionality - Student Affairs	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
Student affairs			
1	Define various council/Board related to Extra Curricular activities of IIM students		
2	Ability to constitute different clubs, societies or committees under various council/boards.		
3	Process to define different posts like Chairman, President, and Secretary etc. under different council/boards and clubs or committees under the council/boards of student affairs		
4	Ability to manage members of different council/boards like student affair council, etc. as well as members of various club/societies/committee under different council/boards		
5	Ability to approve members of different council/boards or club/societies/committee under different council/boards.		
6	Ability to define various awards given to students or hostels by various Agencies/Companies etc		
7	Ability to manage various awards and trophies given to outstanding students and hostels for various extracurricular activities at the end of academic year.		
8	Ability to create various events held under various council/boards or club/society/committee under council/boards.		
9	Ability to create various downloadable forms related to various council/boards. These forms should be downloadable by students for filling.		
10	The achievements of IIM Kozhikode student during the event organized by other institutes.		
11	Contact details of various sponsors of various events held in IIM Kozhikode		
12	Ability to manage various sponsors of various events sponsored held in IIM Kozhikode		
13	Ability to manage submission of nominations for different post in different committees		
14	Process of acceptance of nomination by the nominee for post under council/board or club/society/committee of council/board		
15	Process to verify the details of nominees for different student posts in boards like President, secretary etc.		
16	Ability to manage meeting schedule for different boards and clubs		
17	Ability to approve board memberships, actions and minutes by board/club president		
18	Scholarship applications, processing scholarship applications, scholarship interviews, selection for scholarship, final award of scholarship etc.		

I   **Applications Development**

Sl No	System	Brief Description	Remarks	Bidder's Solution - Configuration (CO)/ Customization(CU)/ Application and Integration (BA)/ Third Party solution (BA)/ Future Release (COF)/ Cannot be met (NC)
1	Faculty Credit Management System	Credit points are allocated to Faculty for taking classes, research, Management Development programs and other functions. Once the activity is completed a workflow hase to be triggered by respective functional group and has to be approved based on approval process. Once approved the credit has to be updated in Faculty database and should be available for view in Faculty self service and other users handling Faculty administration	Detailed Study to be made during business blue print. **If this is available as a standard functionality in ERP it may be used else a new system to be developed**	
2	Accreditation and Ranking management System admin	IIMK has got accreditation as AMBA certified for IIMK's MBA program's. They are also few accreditations in progress. There should be database application and system for management and reporting of Accreditation data. Similarly management institute's are ranked by MHRD(NIRF ranking) and many private agencies. There should be database application and system for management and reporting of ranking data.	Detailed Study to be made during business blue print. **If this is available as a standard functionality in ERP it may be used lease a new system to be developed**	
3	Elective Bidding system	Students in the MBA program has to bid for their electives in the second year. Based on certain rules and process the electives are allocated. A system to be developed for this	Detailed Study to be made during business blue print. **If this is available as a standard functionality in ERP it may be used else a new system to be developed**	
4	Right to Information (RTI) System	RTI System for addressing the RTI questions. The details are given in a separate file Annexure I_IIMK_FRS_RTI.XLSX	Detailed Study to be made during business blue print. **If this is available as a standard functionality in ERP it may be used**	
5	Estate / Transport / Guest house and Logistics	The details are given in a separate file Annexure I_IIMK_FRS_Estate_Transport Logisitics.XLSX	Detailed Study to be made during business blue print. **If this is available as a standard functionality in ERP it may be used**	
6	Complaint Monitoring System	All the complaints by students, Faculty and staff are logged on to the system and action are taken by engineering, electrical, estate and other departments. The complaints include electrical , It systems , Hostel issues etc. Currently there is a legacy system.	Detailed Study to be made during business blue print. **If this is available as a standard functionality in ERP it may be used else Legacy system to be integrated or new system to be developed after study**	
7	Work Flow applications	Many Processes are to be automated through Workflows. A detailed list of workflow are listed in List of Workflow tab of this file. Most of the work flows are also mentioned in the FRS of each functions.	Detailed Study to be made during business blue print. If this is available as a standard functionality in ERP it may be used	
8	Mobile App and Portals as mentioned in FRS	Detailed in FRS	Detailed Study to be made during business blue print. If this is available as a standard functionality in ERP it may be used	

9	Supporting Applications	There are many functions like medical reimbursement, LTC encashment, room booking etc. mentioned in the FRS. **If any of those functions is not a part of ERP and is a bolt on these are also to be developed**	Detailed Study to be made during business blue print. If this is available as a standard functionality in ERP it may be used	
10	Consultancy Management systems	A system to maintain update, report and display the consultancy projects details given in Annexure I_IIMK_FRS_Consultancy Projects.docx	Detailed Study to be made during business blue print. If this is available as a standard functionality in ERP it may be used or existing application to be revamped and integrated or redeveloped	
11	Library Management System	A Portal, application and workflow for automating the Library Activities, details given in AnnexureI_IIMK_FRS_Library System.xlsx		
12	Research Management system	A application for automating the Research Activities, details given in AnnexureI_IIMK_FRS_Research.xlsx		
13	Document Management System	Facility for uploading students answer sheets through an integration with a high speed multifunction scanner. Facility for uploading important documents, cataloging and retrieving the same	Detailed Study to be made during business blue print.	

II ERP Integration

S.No	System to be Integrated	Brief Description		
1	Learning Management System	The system is implemented in Moodle. This is used by Faculty and students for academic activities		
2	Library Management system	LMS is based on open source KOHA software		
3	Biometric Systems for attendance of students and staff	Existing fingerprint based		
4	Mail Server	based on Linux Postfix mail server and Round cube for clients		
5	SMS Gateway			
6	Payment Gateway for fees			
7	Workflows	based on above list and FRS		
8	bolt on applications	based on the above list and FRS		
9	Existing Legacy application which needs to maintained	TO be identified during business blue print	Covered in Legacy App section	

General

S.No	System to be Integrated			
1	Vendor Should provide the source code of the applications developed		Part of program delivery	
2	Vendor to provide detailed documentation of Applications & Integrations		Part of program delivery	

3	Vendor to provide training to Developers of IIMK's computer department on the Applications , work float and portals developed		Part of program delivery	

The list of Work Flow shown are only tentative . The detailed list is to be finalised during the Business Blue PrintStage

Tentative List of Workflows

Sl No	Description		
1	Accommodation booking form	Workflow	
2	Courier/Speed-post requisition	Workflow	
3	Income Tax declaration statement	Workflow	
4	Leave Form & Joining Report - Staff	Workflow	
5	Local Conveyance	Workflow	
6	LTC Advance/Approval	Workflow	
7	LTC Bill	Workflow	
8	Medical Reimbursement	Workflow	
9	No Dues Certificate - Regular Staff	Workflow	
10	No Dues Certificate - Contract Staff	Workflow	
11	Private foreign visit	Workflow	
12	Requisition for Advance under Suspense Account	Workflow	
13	Requisition for Kochi Guest House Accommodation	Workflow	
14	Allotment of IIMK Residence	Workflow	
15	Tour Authorisation Form - Staff	Workflow	
16	Traveling Claim Form	Workflow	
17	Vehicle Requisition	Workflow	
18	Loan-application-Mortgage Deed	Workflow	
19	Facility Booking	Workflow	

ERP Integration

S.No	Applications to be Integrated (Legacy Applications)		
1	HR module	Legacy Apps	
2	Room/Facility booking	Legacy Apps	
3	Leave module	Legacy Apps	
4	Complaint Management system	Legacy Apps	
5	Useful forms manager	Legacy Apps	
6	PGP module	Legacy Apps	
7	EPGP Module	Legacy Apps	
8	FPM Module	Legacy Apps	
9	EPGP-Kochi Module	Legacy Apps	
10	PhD (PT) Module	Legacy Apps	
11	PGP-BL Module	Legacy Apps	
12	Intranet news manager	Legacy Apps	
13	RCP module (consultancy proposal)	Legacy Apps	
14	Store module	Legacy Apps	
15	Faculty research data (conferences, publications, workshops) enroll application	Legacy Apps	
16	Students' affairs module	Legacy Apps	
17	Invoice, credit note and bill of supply module	Legacy Apps	
18	Faculty external talk application	Legacy Apps	
19	MDC room booking	Legacy Apps	
20	SCEDF application	Legacy Apps	
21	E-Grant application	Legacy Apps	
22	KLAN- for alumni details	Legacy Apps	
23	Faculty quarterly appraisal	Legacy Apps	
24	IRB application	Legacy Apps	
25	Student's activity letter	Legacy Apps	
26	AMC remainder	Legacy Apps	

ID	Consultancy Project application	Bidder's Solution - Configuration (CO)/ Customization(CU)/ Application and Integration (BA)/ Third Party solution (BA)/ Future Release (COF)/ Cannot be met (NC)	Bidders Remarks
1	Consultancy Portal to be developed		
2	Facility for client to request for consultancy through faculty or institute		
3	Facility to publish the Consultancy Project		
4	Identification of faculty team to take up the assignment		
5	Facility for faculty team to put their proposals		
6	Submission of Proposal by faculty team to client organization & its acceptance		
7	Project Approval taken by faculty team from Director, IIMK through Dean RII		
8	Commencement of project after receipt of advance amount in IIMK account		
9	Submission of Annual Status/Progress report with received payment details		
10	Completion report submitted by faculty team to Client and IIMK		
11	Updation of credit earned by the faculty in faculty credit management system		

ID	System Functionality - Research	Bidder's Solution - Configuration(CO)/Customization(CU)/ Application Development(AD)/ Third Party Solution(BA)/Future relase(COF)/ Cannot be met (NC)	Bidders Remarks
Research Portal			
1	A Separate Portal for Research. The portal to be available in all devices Web , ipad , mobile		
2	**Research Grant**		
	Small, Medium and Large Grant Research Projects		
	Proposal submission, Review Comments, Re-submission, Approval, Progress and Submission of output		
3	**Research Output**		
	Submission of research output of faculty members- Journal publication, conference presentation, non-refereed journals, books etc.		
4	**Conference**		
	Announcement about conference/workshops/conclaves, Call for papers, submission of abstracts, Review Comments, Resubmission, Acceptance, Full paper submission, Registration,		
5	**Ranking of Journals**		
	Ranking of system of journals to be facilitated as per IIMK norms		
6	**Research Seminars**		
	Announcement of Seminars, Invitation, uploading seminar videos etc.		
7	**Research Internship**		
	Invitation of application, submission of application, process, acceptance etc.		
8	**Working Papers & Case Studies**		
	Publication of Working Papers & Case Studies of faculty in the portal		
9	**Institutional Review Board**		
	Online submission of application, Review Comments, Resubmission, Approval etc.		
10	**Report Generation**		
	Quarter Report, Annual Report, Report for BOG etc.		
11	**Research Newsletter**		
	Input data, Publication etc.		

SL No	Technical Requirement Specification (TRS)	Compliance	Bidders Remarks
I	**General**		
1	The ERP should be based on open architecture and Unicode complaint		
2	Should support in memory and Capability to provides user-friendly, multi-dimensional analysis and information on real-time / updated basis		
3	Should Support Single sign-on		
4	Should have integrated Document Management system		
5	Support N tier and internet architecture		
6	Natively built based on 64 bit OS		
7	The Solution shall provide an application architecture which can be integrated with third party/ legacy applications using the built-in integration tools technology		
8	Workflow including approval with thresholds shall be an integral part of the solution and shall interface with email systems supporting SMTP.		
9	Capability to define various work-flows		
10	Ability to generate report output directly in excel, PDF, text, XML ,HTML or such other file types		
11	Web portal must be part of the basic ERP		
12	The solution shall be able to import data from various formats (Text, Excel, CSV, XML etc.) OR The solution shall be able to import data from various RDBMS like oracle , MS SQL ,etc		
13	Ability to provide MIS dashboards for senior management		
14	System should have single sign-on access across applications and should be intuitive, easy-to-use user interface that can be accessed via the web interface.		
15	The offered ERP product should be both IPv4 and IPv6 compatible		
16	Software should support the localization and provide the necessary localized changes in applicable Tax rules as a patch from time to time		
17	Scalability in terms of number of users and Number of organizational entities		
18	The solution should support the upload and download of multiple types of documents into the Document Management System that include office documents, image files and engineering drawings		
19	All functionalities like data entry screens, various reports, batch processing, integration, etc. should use a common unified application platform suite to provide ease of management to avoid compatibility issues.		
20	Should be the medium for the 24/7 support team of ERP OEM to access the ERP landscape or any component of ERP for issue resolution activities		
21	The solution should support the following network types. LAN and WAN ,Leased Lines , ADSL Lines, Satellite Networks ,MPLS based Networks , VPNs		
22	All functionality/Modules from a single integrated ERP with single database		
23	The solution should have comprehensive online help facility to access system specific technical / functional areas		
II	**Upgradation**		
24	In case an upgrade has impact on the system installed in the following areas, the impact shall be borne by the bidder. Configured parameters , Newly customized programs , Modified standard program source ,Modifications required for integration with ERP		
25	Upgrades should not affect the current version adversely.		
26	The solution should support data conversion tools.		
27	The solution should support e-mail integration.		
28	The solution should support imaging and archiving.		
29	System should be able to integrate with biometric data source and leave management system		
III	**System Administration and Maintenance Capabilities**		

30	Facilities and tools for system administration, database management, applications, archives, network management and security, back up, etc.		
31	Archiving capabilities- system should provide a data archival utility as a part of standard offerings and facility to search the archived data to create reports		
32	Audit Trails capabilities- system should provide this facility to trace against user ID or activity or field level.		
IV	**Integration Capabilities**		
32	Delivered real time integration across functional areas		
40	Ease of building custom integration		
41	Delivered plug-ins to third party applications/systems		
42	Integration with commonly used applications like MS Outlook, Active Directory, Document Management system etc.		
43	Listing of all supported integration methods - Web Service, File based, EDI, etc.,		
44	Integration Architecture		
45	Capability to send notifications/SMS to users' mobile devices		
46	Bar-code/RFID integration capabilities		
47	Batch job/automation and scheduling capabilities		
48	Ease of integration with all other business-critical applications, including office productivity suites, to deliver real business value		
V	**End User Compatibility**		
49	Provide the supported desktop/laptop operating system		
50	Provide the supported mobile devices (Tablets and Mobiles) and respective versions for all functional areas		
51	Provide details of the Indian languages supported Security Capabilities		
52	Specific network bandwidth requirements		
53	The solution's user authentication process		
54	Process for encryption of the entire application selective data as well as data transmission		
55	Security of sensitive data in storage and/or transmission		
56	Support for digital signatures		
57	Support for setting up security profiles as templates that can be applied across modules with access privileges as well as entitlements		
58	Support for complex passwords with configurable expiration		
59	Fingerprint authentication compatibility		
60	Security adherence with GOI regulations		
61	Auditing and logging of user logins		
62	Data retention in support of audit needs		
63	Ability to report audit-related information.		
64	Ability to report workflow-related audit information		

ID	Non Functional Capabilities	Compliance	Bidders Remarks
1	System Administartion Capabilities		
2	Maintenance Capabilities		
3	Reporting Capabilities		
4	Data Migration Capabilities		
5	Reporting Capabilities		
6	Project Management Capbailities		
7	Process Autuomation , Tools to be used		

NOTE

**SI's capability ,Experiance and methodologies in each of the
above items to be explained in details. Case studies and
technical information to be submitted along with the technical
bidd.**

ANNEXURE III: Scripts for POC Demonstration by Bidder

Finance and Accounting **GST**
Payroll **(Salary change due to retrospective Promotion or Pay commission)**
Procurement & Store **(online creation Indent, Purchase Order. Online Creation and approval of Stores Demand Note and issue of items)**
Academics **(student dashboard consisting Attendance, Scholarship, Course Taken, Marks, Hostel & Mess Fees, Overdue, Contact Information)**
Director's Dash Board

Script 1: Finance & Accounts

GST Scenario

1. Receipt of services like AMC

   Institute is having income from services which are taxable as well as exempt. On receipt of service GST credit needs to be apportioned on a pro-rate basis considering the monthly revenue from taxable services.

2. On generation of revenue invoice

   When services are rendered by the Institute, an invoice needs to be raised complying with all the statutory requirements of GST.

3. Generation of GST reports on periodical basis

   Monthly returns (like GSTR 1, GSTR 2A reco, GSTR 3B, GSTR TDS returns), annual returns (like GSTR 9) etc needs to be generated.

Script 2: Payroll

1. Automatic update of salary changes due to retrospective promotion or Pay Commission
2. Identify retro changes
3. Provide increase-by amount based on employee's pay scale.
4. Get the effective date of pay increment based on employee's employment status
5. Calculate retrospective payroll w.r.t. supplementary payment for bonus, arrears like DA, pay fixation and accumulated deduction amount from the arrears for the ones that could not be recovered
6. Approve the pay increment

7. Generate due and draw report statement post pay commission revision or employee promotion
8. Generate an increment change letter online

Script 3: Procurement & Store

(online creation Indent, Purchase Order. Online Creation and approval of Stores Demand Note and issue of items

1. Online creation of Indents
2. Identify each line of the indent as either Revenue or Capital based on the source of funding
3. Based on the type and value of Indent determine if quotations are required and if yes, the number of quotations required
4. Based on the type and value of Indent determine the approvals required for the indent.
5. Enter/upload Tender Specifications for Indents where Tender is issued
6. Approve the indents online
7. Host/publish tenders on website.
8. Based on the quotations received, create a comparison statement of the quotations
9. Online Creation of Purchase Orders based on the accepted quotation
10. Enter details of the appropriate General Ledger Chart of Accounts combination to be debited in the Purchase Order
11. In the case of Foreign Purchase Orders, upload 'End User Certification' for customs clearance purpose
12. Audit to review all the details related to Purchase Order and approve online before Purchase Order is fully approved
13. View the approval status of the Purchase Orders sent for approval and send reminders to approvers where approvals are overdue.
14. Edit Purchase Order, based on security/authority, at any time after the Purchase Order is created and submitted for approval. After editing, the approval process should restart.
15. Exception approval of Purchase Orders in case of deviations from the norms related to number of quotations required
16. Approve Purchase Order online
17. Calculate applicable withholding tax / service tax in the Purchase Order
18. Check for budget availability for the specified General Ledger Chart of Accounts combination at the time of creation of the Purchase Order.
19. Place a commitment against the appropriate General Ledger Chart of Accounts combination at the time purchase order is approved
20. Update commitment in Budgets
21. Print / dispatch and email Purchase Order and other relevant documents to the Vendor.
22. Create a Material Acceptance note on receipt of items purchased

23. Send Purchase Order with Material Acceptance note, Invoice and Payment Advice to Finance and Accounts for Payment
24. Create Accounts Payables Vouchers (payments and prepayments)

Script 4: Academics

- Student Dashboard should show the following items:
- Attendance,
- Scholarship,
- Course Taken,
- Marks,
- Hostel & Mess Fees,
- Overdue,
- Contact Information

Attendance:

1. Capture Student's attendance and reason for absence
2. Capture Student details for scholarship (eligible PGP students)

Scholarship:

3. Ensure that student is not allowed to get more than 1 scholarship
4. Record/classify Scholarship types depending on the source of funding
5. Pay scholarship based on the attendance units (similar to Salary)
6. Manage Advance payment and recovery from scholarship
7. Record and Display Scholarship on dashboard - Student wise, Course Wise

Course Taken:

8. Instructor to verify/approve the student list and return to academic section.
9. Student to register set of courses for a particular term - 2nd term for PGP
10. Student to withdraw from ongoing course with certain period.
11. Mark the grade as "Failed" if students did not withdraw in time, and this should be considered while deriving CGPA score

Marks:

12. Generate Consolidated Marks and Grade Sheet by the course instructor for PGP
13. Enter Grades by Instructor / Associate
14. Generate Result
15. Generate report for not fulfilling IIMK Norms (problem cases)
16. Capture the action taken report on problem cases.
17. Capture feedback from students on Courses and Instructors after each term
18. Send student's results to their email IDs
19. Send a consolidated student results to Program chair – PGP and Concerned Faculty

20. Print final transcripts

Hostel & Mess Fees:
21. Provide temporary accommodation online to students through random selection of available rooms.
22. Allot Room/Mess to students online and provide allotment letter
23. Generate Mess ID cards (consisting of bar codes)
24. Permit students to the respective messes after scanning their ID cards.
25. Generate Bills for - Mess and Room Rent
26. Send this Data(Bills) to students and F&A
27. Hostel Office Staff to update the last date of vacation for both mess and room

Any overdue:
28. Recover (by Hostel Office) If any Dues are pending, pay in bank or else no dues certificate will not be issued to student.
29. Issue "NO Dues certificate" by Hostel Office If all Dues are cleared by student

Contact Information:
30. Capture/Change Student's address and contact information online
31. Capture/Change Student's parent details and their contact information from Application form

Script 5: Director's Dash Board

A sample dash board based on the input given in Dash Board FRS.

Price Bid

(A) ERP Implementation Cost

Sl No	Description	Price (INR)
1	Phase I Implementation	
2	Phase II Implementation	
	GST / Taxes	
	Total Implementation Cost inclusive of Taxes	

(B) Support Cost

Sl No	Description	Price (INR)
1	3 months Post Go Live Support for Phase I	
2	3 months Post Go Live Support for Phase II	
3	AMC for 1st Year for phase I	
4	AMC for 1st Year for Phase II	
5	AMC for 2nd Year for Phase I	
6	AMC for 2nd Year for Phase II	
7	AMC for 3rd Year - Phase I	
8	AMC for 3rd Year - Phase II	
9	AMC for 4th Year - Phase I	
10	AMC for 4th Year - Phase II	
11	AMC for 5th Year - Phase I	
12	AMC for 5th Year for Phase II	
	GST / Taxes	
	Total Support Cost	

(C) Rate Card

Sl No	Consultant	Rate per month Excluding Taxes (INR)
1	Functional Consultant	
2	Technical Consultant	
3	Application Developer	

(D) Any other Cost

Sl No	Description	Price (INR)
1		
2		
3		

1. Any other items to be added may be included in "(D)Any other Cost' part

2. The AMC for 1st Year starts after 3 months post Go live handholding support

3. '(C) Rate Card' will not be considered during Price Bid evaluation

NOTE: The bidder can down load the Price Bid (BOQ) in Excel file as above mentioned from E-Procurement Portal. The bidder needs to fill up the rates in corresponding cells and upload the same in the designated location of BOQ in portal.

S.No	IIMK Document Reference	Vendor Question / Clarification	IIMK Response

Project Implementation Resources

No consultant should be outsourced from a different company except for very specialized areas of Student LIfe Cycle Management and Academic System. In such cases, the SI shoul take prior approval of IIMK

Project Manager

Minimum ten years of experience, including ERP Project Management experience of minimum two Projects and implementation experience in minimum three ERP implementation lifecycles. Certified Professionals with ERP project implementation in University / Education Institute / College in India /worldwide preferred.

Functional Integration Manager

Minimum seven years of experience, including ERP Project Implementation experience of minimum three Projects. Should understand different modules of ERP and effect of change in parameters in one module how the same will affect the system. He / she should be in charge of all the integration issues during implementation. Certified Professionals having ERP project implementation in University / Education Institute / College in India /worldwide   preferred.

Change Management Lead

Minimum seven years of professional experience including experience of Conducting change management workshops, developing change management strategy. The person should have led the change management track in at least one ERP implementation lifecycles.

Functional Leads

Minimum seven years of professional experience including Functional Lead experience of minimum two ERP implementation projects and should include at least one India localization experience in the relevant modules. Certified Professionals having ERP project implementation in University / Education Institute / College in India /worldwide preferred.

Functional Consultants

Minimum three years of professional experience including two years of experience in ERP implementation including minimum two ERP implementation lifecycles which include at least one India localization experience in the relevant modules. Certified Professionals having one ERP project implementation in University / Education Institute / College in India / worldwide desirable,

Technical Leads

Minimum eight years of experience in the technical domain including Technical Lead experience of minimum two ERP implementation projects.

Industry Subject Matter Expert (SME)

Should have knowledge and experience in ERP implementation of University / Education Institute and academics functions

IT Infrastructure Lead

Should have knowledge on Cloud architecture & design and disaster recovery planning & implementation . He/ she should have experience for at least two instances of developing specification for cloud ERP and WAN. The IT Infrastructure Lead should be able to work closely with IT team for the Infrastructure planning for IIMK

Development Engineer - Application, Portal, mobile, workflow, analytics development

Minimum three years of professional experience including two years of experience in application development for ERP in relevant area.

Note :

The proposed project team members should not be subcontracted and should be on the payroll of the bidder and should have been working with the bidder for more than six months. The detailed resumes to be provided in the standard format. IIMK has rights to reject or change any proposed bidder team member based on IIMK evaluation during contract finalization.

Training for IS staff				
Sl No	**Area of Training**	**Man days**	**Schedule**	**Compliance / Remarks**
1	ERP System and Database admin	10 days		
2	ERP System and Database admin Advanced	10 days		
3	Application development using ERP development tools	10 days Two batches		
4	Analytics on ERP	5 days Two batches		
5	Mobile App integrated to ERP	15 days		
6	Portal Development	15 days		
7	Data migration tools	05 days		
8	Integration frame work	10 days		
9	Workflow development	10 days		

Training for Functional Users - Finance, HR, Payroll, Procurement, Asset Accounting and Student Information System

Sl No	Area of Training	Audience	Batch	Man Days	Schedule	Compliance / Remarks
1	Overview of ERP – Finance Module	Finance Users	2 Batches	2 days	After Kickoff	
2	Overview of ERP – Procurement	Procurement Users , other users	2 Batches	2 days	After Kickoff	
3	Overview of ERP – HCM Module	HR Users, other users	2 Batches	2 days	After Kickoff	
4	Overview of ERP – Payroll Module	HR Users and Payroll Users	1 Batch	2 days	After Kickoff	
5	Overview of ERP – SIS Module	SIS Core Team	2 Batches	2 days	After Kickoff	
6	Functional Consultants– Finance	Finance Users	1 Batch	10 days	After Project Kickoff (before the start of Business Blueprint stage) & before the start of UAT Post Go- Live	
7	Functional Consultants– Procurement	Procurement Users	1 Batch	5 days		
8	Functional Consultants– HCM Module	HR Users	2 Batches	5 days		
9	Functional Consultants– Payroll Module	HR Users and Payroll Users	1 Batch of 20 (max)	5 days		
10	Functional Consultants– SIS Module	SIS Core Team	3 Batches	10 days		

11	Data Migration Tools	Functional Users - Finance, HR, Payroll, SIS, Procurement and Asset Accounting	3 Batches	2 days	During Design Phase	
12	Basic Report Generation	Functional Users - Finance, HR, Payroll, SIS, Procurement and Asset Accounting	3 Batches	2 days	Before UAT	

Training for Project Team

S.No	Area of Training	Man Days	Schedule	Compliance / Remarks
1	Overview of ERP All modules	10 days 2 Batches	During Kickoff	
2	Change Management Workshop	2 days 5 Batches	Before UAT	
3	Data Migration Tools	2 days 2 Batches	During Design Phase	
4	Basic Report Generation	2 days 2 Batches	Before UAT	

Training for end users

Sl No	Area of Training	Audience	Batches	Man Days	Schedule	Compliance / Remarks
1	Overview of ERP	End-Users/ Helpdesk	10 batches	0.5 days each	Before go- live	
2	User Training - Student Self Services	Helpdesk Team/ Master Trainer	10 batches	0.5 days each	Before go- live	
3	User Training Employee Self Services Manager Self Services Student Self Services Faculty Self Services Module specific processes – Finance Procurement HCM Payroll, Student Information System.	End-Users/ Helpdesk Team	10 batches	0.5 days each	Before go- live	
4	Using Dashboard	To be covered under user training				
5	Using Workflow					
6	Analytics					

SI No	Function	File Name	CO	CU	AD	BA	NC	Total
1	Finance and Accounts	Annexure I_IIMK_FRS_Finance						
2	Human ResourceManagement	Annexure I_IIMK_FRS_HR						
3	Payroll	Annexure I_IIMK_FRS_Payroll						
4	Purchase & Store Management, Asset Management	Annexure I_IIMK_Purchase & Asset Management						
5	Academic system including Student Information System							
	PGP	Annexure I_IIMK_FRS_PGP						
	EPGP Kochi	Annexure I_IIMK_FRS_epgpkochi						
	EPGP Online	Annexure I_IIMK_FRS_epgponline						
	MDP	Annexure I_IIMK_FRS_MDP						
	FPM	Annexure I_IIMK_FRS_FPM						
6	Self Service Portal							
	Director's Dashboard, Dean's Dashboard, CAO's Dashboard	Annexure I_IIMK_FRS_Dashboards						
	Faculty Self ServicePortal	AnnexureI_IIMK_FRS_Faculty_SelfservicePortal						
	Student's Self Service Portals	AnnexureI_IIMK_FRS_Student_SelfService_PGP						
	Student's Self Service Portals	AnnexureI_IIMK_FRS_Student_SelfService_ePGP						
	Student's Self Service Portals	AnnexureI_IIMK_FRS_Student_SelfService_FPM						
	Staff Self Service Portal	Annexure I_IIMK_FRS_Staff_Selfservice						
7	Academic Administration	Annexure I_IIMK_FRS_Academic Admin						
8	Alumni	Annexure I_IIMK_FRS_Alumni						
9	Director's Office	Annexure I_IIMK_FRS_Directors office						
10	Engineering	Annexure I_IIMK_FRS_Engineering						
11	Estate, Transport,Logistics	Annexure I_IIMK_FRS_Estate Transport Logistics						
12	Hostel Management	Annexure I_IIMK_FRS_Hostel_Management						
13	InternationalRelations	Annexure I_IIMK_FRS_International Relations						
14	Library System	Annexure I_IIMK_FRS_Library system						
15	Placement	Annexure I_IIMK_FRS_Placement						
16	RTI (^^)	Annexure I_IIMK_FRS_RTI						
17	Student Affairs	Annexure I_IIMK_FRS_Student Affairs						
18	Applications &Integrations	Annexure I_FRS_IIMK_Applications & Integrations						
19	Consultancy Projects	Annexure I_IIMK_FRS_Consultancy Projects						
20	Research	Annexure I_IIMK_FRS_Research						
	Total							

9. Forms

Forms(1-9): The bidders are required to submit the following forms along with the tender documents, otherwise will be disqualified from the further processing of the tender:

Sl. No.	Form No.	Form Name	Page No.
1	Form No-1	PROPOSAL COVERING LETTER	219
2	Form No-2	CONFLICT OF INTEREST	222
3	Form No-3	UNDERTAKING CHANGES/MODIFICATIONS	223
4	Form No-4	DECLARATION ON BLACK LISTING	224
5	Form No-5	IPR/SOLUTION OWNERSHIP DECLARATION	225
6	Form No-6	BID SECURITY DECLARATION FORM	226
7	Form No-7	NON – DISCLOSURE AGREEMENT	227
8	Form No-8	INTEGRITY PACT	233

FORM-1
[PROPOSAL COVERING LETTER]

Registered Business
NameBusiness
Address
Tel.

E-mail Website

To

The Chief Administrative Officer,
Indian Institute of Management Kozhikode,
IIMKCampus PO Kunnamangalam,
Kozhikode -673570

Sir,

We hereby apply to be qualified with the Indian Institute of Management Kozhikode as a Bidder for the work of "Implementation and Support of Enterprise Resource Planning (ERP) Solution at Indian Institute of Management Kozhikode (IIMK)"

We are hereby submitting our Proposal, which includes this Technical bid and the Price Bid sealed on the e -procurement portal of Government of India at https://mhrd.euniwizarde.com .We confirm to follow and accept the terms and conditions of the e-procurement portal https://mhrd.euniwizarde.com

We authorize Indian Institute of Management Kozhikode or its authorized representatives to conduct any investigations to verify the statements, documents and information submitted and to clarify the financial and technical aspects of this application. For this, we hereby authorize (public official,engineer, bank, depository, manufacturer, distributor, etc.) or any other person or firm to furnish the pertinent information deemed necessary and requested by Indian Institute of Management Kozhikode to verify statements and information provided in this application or regarding competence and standings.

1. The names and positions of persons who may be contacted for further information, if required are as follows:

   a) Technical Name: _____ Designation:_____

      Telephone: _____ E-mail id: _____

   b) Personnel Name:_____ Designation: _____

      Telephone: _____ E-mail id: _____

   c) Financial Name:_____ Designation:_____

      Telephone: _____ E-mail id: _____

2. We declare that the statements made and the information provided in the duly completed applications are complete, true and correct in every detail.

3. We declare that no attempt has been made or will be made to induce any person or firm to submit or not to submit a tender for the subject work.

4. We understand that Indian Institute of Management Kozhikode reserves the right to reject any tender without assigning any reasons.

5. We declare that the statements made and the information provided in the duly completed application are complete, true and correct in every detail. On verification at any time in the future if it is found that information furnished with this application and statements made therein are not true, incomplete or incorrect, we hereby authorize IIMK to reject our tender.

6. We confirm having submitted the information as required by you in Qualification Criteria. In case you require any other further information / documentary proof in this regard before evaluation of our bid, we agree to furnish the same in time to your satisfaction

7. We undertake, if our proposal is accepted, to provide all the services related to "Implementation and Support of Enterprise Resource Planning (ERP) Solution at Indian Institute of Management Kozhikode (IIMK)" put forward in the bid document or such features as may subsequently be mutually agreed between us and IIMK or its appointed representatives.

8. We agree for unconditional acceptance of all the terms and conditions set out in the bid document and also agree to abide by this bid response for a period of 180 days from the date fixed for bid opening and it shall remain binding upon us with full force and virtue. Till a formal contract is prepared and executed, this bid response, together with your written acceptance thereof in your notification of award, shall constitute a binding contract between us and IIMK.

9. We shall size the cloud and ERP software Licenses based on information provided by IIMK in its tender document, past experience of similar implementations, best practices followed elsewhere and in accordance with the expected tender and Service Level requirements and assure IIMK that the required sizing shall be accounted in the Price Bid. However, if the sizing of any of the proposed solutions is found to be inadequate in meeting the tender and the Service Level requirements given by IIMK, then we will upgrade the proposed solution without any additional cost to IIMK.

10. I/We do hereby undertake that commercial proposal submitted by us is inclusive of all the items in the technical proposal and is inclusive of all the clarification provided/may be provided by us on the technical proposal during the evaluation of the technical offer. We understand and agree that our commercial proposal is firm and final and shall any clarifications sought by you and provided by us would not have any impact on the commercial proposal submitted by us.

11. We understand you are not bound to accept any Proposal you receive We understand you are not bound to accept any Proposal you receive.

Thanking you,

Yours faithfully

(The Authorized signatory of the Bidding Organization)

Name:

Designation:

Date:

Company
Seal:

FORM-2

CONFLICT OF INTEREST

(On Company letter head)   [Date]

To

The Chief Administrative Officer
Indian Institute of Management Kozhikode,
IIMK Campus PO Kozhikode -673570

Sir,

Sub: Undertaking on Conflict of Interest

I/We, as the Implementation Agency, do hereby undertake that there is absence of, actual or potential conflict of interest on our part as the bidder or any prospective subcontractor due to prior, current, or proposed contracts, engagements, or affiliations with IIMK.

I/We also confirm that there are no potential elements (time-frame for service delivery, resource, financial or other) that would adversely impact our ability to complete the requirements as given in the RFP.

We undertake and agree to indemnify and hold IIMK harmless during the term of the contract or five years thereafter against all claims, losses, damages, costs, expenses, proceeding fees of legal advisors (on a reimbursement basis) and fees of other professionals incurred (in the case of legal fees and fees of professionals, reasonably) by IIMK and/or its representatives, if any such conflict arises later.

Yours faithfully,

Authorized SignatoryDesignation

Company Seal

FORM-3

[UNDERTAKING CHANGES/MODIFICATIONS]

To

The Chief Administrative Officer
Indian Institute of Management Kozhikode,
IIMK Campus PO
Kozhikode -673570

Dear Sir,

We……….

……….

…………………do hereby confirm that no changes have been made in the tender document

downloaded and submitted by us for the Tender No……. Dated……

Yours faithfully,

Signature   :

Name & Designation:

FORM-4

[DECLARATION ON BLACK LISTING]

To

The Chief Administrative Officer
Indian Institute of Management Kozhikode,
IIMK Campus PO
Kozhikode -673570

Dear Sir,

In response to the tender No……………………………Dated……………………or "< >", I/ We hereby declare that presently our Company/ Firm…………….is having unblemished record and is not declared ineligible for corrupt & fraudulent practices either indefinitely or for a particular period of time by any Government of India /State Government/ Public Sector Units. We further declare that presently our Company/ firm ……………………………………………………………. …………………………………………is not blacklisted and not declared ineligible for reasons other than corrupt & fraudulent practices by any Government of India /State Government/ Public Sector Units on the date of Bid Submission. If this declaration is found to be incorrect then without prejudice to any other action that may be taken, my/ our security may be forfeited in full and the tender if any to the extent accepted may be cancelled.

Thanking you,

Yours faithfully
(Signature of the Authorized signatory of the Bidding Organization)
Name:

Designation:

Date:

Company Seal:

FORM-5
[IPR/SOLUTION OWNERSHIP DECLARATION]

(To be submitted on the Letterhead of the Software OEMs) (Place) (Date)

To

The Chief Administrative Officer
Indian Institute of Management Kozhikode,
IIMK Campus PO
Kozhikode -673570

    Sub: Undertaking on intellectual property rights for the solution component
/tools (name of the solution /tool) proposed to be supplied to IIMK

I/We do hereby undertake that he we are the rightful owners of the solution component / tool (name of the solution/tool) being provided by us and is not infringing on any patent or other intellectual property rights as per the applicable laws of relevant jurisdictions have requisite competence.

I/We also confirm that there shall be no infringement of any patent or other intellectual property rights as per the applicable laws of relevant jurisdictions having requisite competence, in respect of the solution or tool (name of the solution / tool) or any part thereof to be supplied by us. We shall indemnify IIMK against all cost/claims/legal claims/liabilities arising from third party claim in this regard at any time on account of the infringement or unauthorized use of patent or any other intellectual property rights of any such parties, whether such claims arise in respect of manufacture or use.

Without prejudice to the aforesaid indemnity, we shall be responsible for the completion of the supplies of the solution component / tool (name of the solution / tool) including upgrades as and when they are made available and uninterrupted use of the software solution and/or system or any part thereof to IIMK and persons authorized by IIMK, irrespective of the fact of claims of infringement of any or all the rights mentioned above.

If at a later date it is found that it does infringe on patent or any other intellectual property rights, I/We absolve and indemnify IIMK of any legal action.

Yours faithfully,

Authorized Signatory Designation

FORM-6
[In letter Head of the Firm]

BID SECURITY DECLARATION FORM

Tender No. ………………………………………………………dt……………………….

To

Indian Institute of Management Kozhikode
IIMK Campus P. O., Kozhikode,
Kerala, PIN - 673 570

I/We. The undersigned, declare that:

I/We understand that, according to your conditions, bids must be supported by a Bid Securing Declaration.

I/We accept that I/We may be **disqualified/blacklisted** from bidding for any contract with you for a period of one year from the date of notification of tender if I am /We are in a breach of any obligation under the bid conditions, because I/We

a) have withdrawn/modified/amended, impaired or derogated from the tender, my/our Bid during the period of bid validity specified in the form of Bid;

or

b) having been notified of the acceptance of our Bid by the purchaser during the period of bid validity (i) failed to execute the contract, if required, or (ii) failed or refused to furnish the Performance Security, in accordance with the Instructions to Bidders.

I/We understand that this Bid Securing Declaration shall cease to be valid if I am/we are not the successful Bidder, upon the earlier of (i) the receipt of your notification of the name of the successful Bidder; or (ii) thirty days after the expiry of the validity of my/our Bid.

Signed : *(signature of person whose name and capacity are shown)*

in the capacity of *(insert legal capacity of person signing the Bid Securing Declaration)*

Name: *(insert complete name of person signing he Bid Securing Declaration)*

Duly authorized to sign the bid for an on behalf of *(insert complete name of Bidder)*

Dated on _____ day of _____ *(insert date of signing)*

Corporate Seal (where appropriate)

FORM-7
[FORMAT FOR NON-DISCLOSURE AGREEMENT]

<u>Non-Disclosure Agreement</u>

This Non-Disclosure Agreement dated the ……… day of _____, 2021 BETWEEN

Indian Institute of Management Kozhikode (hereinafter referred to as the"**Disclosing Party**")

AND

_____ , **a company incorporated underthe laws of India and having its registered office at**

_____**(Hereinafter referred to as "**Receiving Party**") (Collectively referred to as "the parties")

WHEREAS

In connection with**"** _____ ", the Receiving Party as

<u>Contractor</u> by the Disclosing Party, the Parties have agreed to execute this Nondisclosure Agreement to ensure that all information provided by the Disclosing Party to the ReceivingParty in the course of engagement of the Receiving Party as **<u>Contractor</u>** is kept confidential

NOW IT IS HEREBY AGREED AS FOLLOWS:

1. <u>Definitions</u>

    a) "**Purpose**" shall mean **"** _____ ","by the Receiving Partyto the Disclosing Party.

    b) "**Confidential Information**" shall mean all discussions, documents, paper, discs, technology, procedure and other information of a confidential nature pertaining to, generated or disclosed by either party in any form including in writing, electronically, computerized orally or otherwise marked as

    "Confidential" or informed to be „Confidential" or relating to the Purpose,

including,without limitation:

i. All financial details investment plans, price specifications, schemes, technology know-how, techniques and information relating to business, investments, transactions or affairs, services being rendered, plans for business investments or for improving services and discussions on future services; and all other information, material or data relating to thecurrent and /or future business and operations of the Disclosing Party and analysis, compilations, studies, summaries, extracts or other documentation prepared by the Receiving Party arising out of the Confidential Information.

ii. The terms of this or any other agreement or document signed or to be signed by or between the Parties and the provisions thereof.

However, "Confidential Information" shall exclude any part of such disclosedinformation or data which: -

i. is in or comes into the public domain in any way without breach of this Agreement by the Receiving Party; or

ii. the Receiving Party can show (a) was in its possession or known to it by being in its use or being recorded in its files or computers or other recordingmedia prior to receipt from the Disclosing Party and was not previously acquired by the Receiving Party from the Disclosing Party under an obligation of confidence, or (b) to have been developed by or for the Receiving Party at any time independently of any information disclosed to it by the Disclosing Party; or

iii. the Receiving Party obtains from a source other than the Disclosing Party without breach by the Receiving Party or such source or any obligation of confidentiality or non-use towards the Disclosing Party; or

iv. is hereafter furnished by the Disclosing Party to a third party without restriction on disclosure or use; or

v. is disclosed by the Receiving Party (a) with the prior written approval of the Disclosing Party, or (b) without such approval, after a period of one year from the date of receipt thereof.

2. The Receiving Party shall maintain the Disclosing Party's Confidential Information in confidence and shall exercise in relation thereto no lessersecurity measures and degree of care than those which the Receiving Party applies to its own Confidential Information which the Receiving Partywarrants as providing adequate protection against unauthorized disclosure, copying or use. The Receiving Party shall ensure that disclosure of such confidential information is restricted to those employees, directors, officers, representatives, advisors, consultants or agents (collectively referred to as

"**Representatives**") of the Receiving Party having the need to know the same for the Purpose. Copies or reproductions shall not be made except to the extent reasonably necessary for the Purpose and all copies made shall be the property of the Disclosing party. All Confidential Information and copies thereof shall be returned to the Disclosing Party within <u>seven (7) days of receipt of a written request from the Disclosing Party.</u>

The Receiving Party shall not attempt to reverse engineer, decompile, disassemble or reverse translate any Confidential Information provided by the Disclosing Party or discover the source code or trade secrets in any such Confidential Information.

Nothing in this Agreement shall limit the ability of a party to disclose such Confidential Information of the other party if such disclosure is

a) required to be made pursuant to any law or regulation, government authority, duly authorized subpoena or court order, whereupon that party shall provide prompt notice to the Disclosing Party of the Confidential Information in question, who will thereof have the opportunity to respond prior to such disclosure;

b) Required to be made by a court or other tribunal in connection with the enforcement of such Disclosing and all copies made shall be properties of disclosing party. All Confidential Information and copies thereof shall be returned to the Disclosing Party within <u>seven (7) days of receipt of a written request from the Disclosing Party.</u> The Receiving Party shall not attempt to reverse engineer, decompile, disassemble or reverse translate any confidential information provided by the Disclosing Party or discover the source code or trade secrets in any such Confidential Information.

Nothing in this Agreement shall limit the ability of a party to disclose such Confidential Information of the other party if such disclosure is

a) Required to be made pursuant to any law or regulation, government authority, duly authorized subpoena or court order, whereupon that party shall provide prompt notice to the Disclosing Party of the Confidential Information in question, who will thereof have the opportunity to respond prior to such disclosure;

b) Required to be made by a court or other tribunal in connection with the enforcement of such Disclosing Party's rights under this Agreement, or

c) Is approved by the prior written consent of the Disclosing Party of the Confidential Information.

3. <u>Limitations and Warranty</u>

a. The Receiving Party shall (i) not divulge the Disclosing Party"s Confidential

Information, in whole or in part, to any third party without the prior written consent of the Disclosing Party, (ii) use the same only for the Purpose, and (iii) make no commercial of the same or any part thereof without the prior written consent of the Disclosing Party. Notwithstanding the foregoing, the Receiving Party shall be entitled to make any disclosure required by law of the Disclosing Party's Confidential Information.

b. The Disclosing Party warrants its right to disclose its Confidential Information to the Receiving Party and to authorize the Receiving Party to use the same for the Purpose.

4. Disclaimer

All rights in Confidential Information are reserved by the Disclosing Party and no rights or obligations other than those expressly recited herein are granted or to be implied from this Agreement. In particular, no licence is hereby granted directly or indirectly under any invention, discovery, patent, copyright or other intellectual property right now or in the future held, made, obtained or licensable by either party. Nothing in this Agreement or its operation no rights or obligations other than those expressly recited herein are granted or shall constitute an obligation on either party to enter into the aforesaid business relationship or shall preclude, impair or restrict either party from continuing to engage in its business otherwise that in breach of the terms of this Agreement

5. Notices

All notices under this Agreement shall be in writing, sent by facsimile or first- class registered or recorded delivery post to the party being served at its address specified above or at such other address of which such party shall have given notice as aforesaid, and marked for the attention of that party's signatory of this Agreement. The date of service shall be deemed to be the day following the day on which the notice was transmitted or posted as the case may be.

6. No Bar on Participation in Projects initiated by the Disclosing Party

The Disclosing Party acknowledges that the advisory mandate awarded to the Receiving Part will not bar the Receiving Party or any of its group companies from bidding or participating in any projects initiated by the Disclosing Party on the ground that the Receiving Party was privy to information which was not within the public domain. On its part the Receiving Party shall ensure, confirm and warrant that neither the Receiving Party nor any of its group companies will miss- use the information available to it in the course of the advisory mandate to derive an unfavorable advantage in bidding /participation in any projects initiated by the Disclosing Party .The Disclosing Party on its part shall not summarily debar or reject the bid/participation of the Receiving Party on the ground that the Receiving Party

was Privy to confidential information and it has derived undue advantage, unless reasonable opportunity it's given to the Receiving Party to put forth its say.

7. Non-Assignment

This Agreement is personal to the parties and shall not be assigned or otherwise transferred in whole or in part by either party without the prior written consent of the other party.

8. Forbearance

No relaxation, forbearance or delay by a party in enforcing any of the terms of this Agreement shall prejudice, affect or restrict its rights, nor shall waiver by a party of any breach hereof operate as a waiver of any subsequent or continuing breach.

9. Indemnity

The Receiving Party agrees to indemnify the Disclosing Party for any loss or damage suffered due to any breach by it of its obligations under this Agreement.

Damages shall include all costs, expenses and attorney's fees incurred by the Disclosing Party in the enforcement of this Agreement.

provided always that in no event shall either party be liable to the other party for any indirect, incidental and/or consequential damages, lost business, lost savings or lost profits or revenues resulting from a breach of this agreement even if the breaching party has been advised of the possibility of the occurrence of such damages.

10. Non-Publicity

The parties shall not make any announcement or disclosure of any kind whatsoever concerning this Agreement, including without limitation the existence of this Agreement, without the other Party's prior written consent whatsoever concerning this Agreement, including without limitation the existence of this Agreement, without the other Party's prior written consent unless such announcement and/or disclosure is required by law.

11. Notwithstanding anything contained herein to the contrary, the obligations of the Parties herein shall continue for a period of one (1) year from the date of this Agreement or if a further agreement is entered into, the termination of such further agreement, whichever is the later.

12. The Receiving Party agrees that the obligations contained in this Agreement shall extend to the affiliated companies of the Receiving Party and to all its advisors and consultants. In this respect the Receiving Party represents that agreement to keep

such information confidential, on terms similar to this Agreement, is in place before disclosing any Confidential Information to such affiliate, advisor or consultant.

13.   Entire Agreement

This Agreement constitutes the entire agreement and understanding between the parties in respect of Confidential Information and supersedes all previous agreements, understandings and undertakings in such respect. This Agreement cannot be amended except by written agreement signed on behalf of each party by their authorized signatories.

14.   Dispute Resolution

The parties shall attempt to resolve any dispute arising out of or in connection with this Agreement by mutual consultation, failing which such dispute shall be referred to and finally resolved by arbitration in India under the auspices and governed by the provisions of the Arbitration and Conciliation Act, 1996. The arbitration shall be at Ernakulam and only the courts at Ernakulam shall have the jurisdiction to try any matters arising from the arbitration. The language of the arbitration shall be in English.

15.   Governing Law and Jurisdiction

This Agreement shall be governed by and constructed in all respects in accordance with the laws of India.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their duly authorized representatives on the day and year first above written

On behalf of **Disclosing Party**   On behalf of Receiving Party

Signature_____   Signature _____

Name_____   Name _____

Title   _____   Title_____

FORM-8

[INTEGRITY PACT]

PRE-CONTRACT INTEGRITY PACT

General

This pre-bid pre-contract Agreement (hereinafter called the Integrity Pact) is made on _____day of the month of_____ 2021, between, on one hand, the Board of Governors of Indian Institute of Management, Kozhikode acting through Shri

Lt Col M Julius George (Retd) ,Chief Administrative officer, Indian Institute of Management, Kozhikode (hereinafter called the 'BUYER/EMPLOYER', which expression shall mean and include, unless the context otherwise requires, his successors in office and assigns) of the First Part and M/s_____represented by Shri _____, (Name and Designation) (hereinafter called the 'BIDDER' which expression shall mean and include, unless the context otherwise requires,his successors and permitted assigns) of the Second Part.

WHEREAS the 'BUYER/EMPLOYER' has invited bids for_____and the BIDDER is submitting his bid for the same and

WHEREAS the BIDDER is a Private company / Public company / Government undertaking/ registered partnership firm, constituted in accordance with the relevant law in the matter and the 'BUYER/EMPLOYER' is, Indian Institute of Management, Kozhikode.

NOW, THEREFORE,

To avoid all forms of corruption by following a system that is fair, transparent and free from any influence/prejudiced dealings prior to, during and subsequent to the currency of the contract to be entered into with a view to:-

Enabling the 'BUYER/EMPLOYER' to obtain the desired said stores/ equipment /services/works at a competitive price in conformity with the defined specifications by avoiding the high cost and the distortionary impact of corruption on public procurement, and Enabling BIDDERS to abstain from bribing or indulging in any corrupt

practice in order to secure the contract by providing assurance to them that their competitors will also abstain from bribing and other corrupt practices and the 'BUYER/EMPLOYER' will commit to prevent corruption, in any form, by its officials by following transparent procedures.

The parties hereto hereby agree to enter into this Integrity Pact and agree as follows:

1. **Commitments of the 'BUYER/ EMPLOYER'**

    1.1   The 'BUYER/EMPLOYER' undertakes that no official of the 'BUYER/ EMPLOYER', connected directly or indirectly with the contract, will demand, take a promise for or

accept, directly or through intermediaries, any bribe, consideration, gift, reward, favour or any material or immaterial benefit or any other advantage from the BIDDER, either for themselves or for any person, organisation or third party related to the contract in exchange for an advantage in the bidding process, bid evaluation, contracting or implementation process related to the contract.

1.2 The 'BUYER/EMPLOYER' will, during the pre-contract stage, treat all BIDDERS alike and will provide to all BIDDERS the same information and will not provide any such information to any particular BIDDER which could afford an advantage to that particular BIDDER in comparison to other BIDDERS.

1.3 All the officials of the 'BUYER/EMPLOYER' will report to the appropriate Government office any attempted or completed breaches of the above commitments as well as any substantial suspicion of such a breach.

1.4 In case any such preceding misconduct on the part of such official(s) is reported by the BIDDER to the 'BUYER/ EMPLOYER' with full and verifiable facts and the same is prima facie found to be correct by the 'BUYER/EMPLOYER' necessary disciplinary proceedings, or any other action as deemed fit, including criminal proceedings may be initiated by the 'BUYER/ EMPLOYER' and such a person shall be debarred from further dealings related-to the contract process. In such a case while an enquiry is being conducted by the 'BUYER/ EMPLOYER' the proceedings under the contract would not be stalled.

2. **COMMITMENTS OF BIDDERS**

The BIDDER commits itself to take all measures necessary to prevent corrupt practices,unfair means and illegal activities during any stage of its bid or during any pre-contract or post-contract stage in order to secure the contract or in furtherance to secure it and in particular commit itself to the following: -

2.1 The BIDDER will not offer, directly or through intermediaries, any bribe, gift, consideration, reward, favour, any material or immaterial benefit or other advantage, commission, fees, brokerage or inducement to any official of the 'BUYER/EMPLOYER' connected directly or indirectly with the bidding process, or to any person, organisation or third party related to the contract in exchange for any advantage in the bidding, evaluation, contracting and implementation of the contract.

2.2 The BIDDER further undertakes that it has not given, offered or promised to give, directly or indirectly any bribe, gift, consideration, reward, favour, any material or immaterial benefit or other advantage, commission, fees, brokerage or inducement to any official of the 'BUYER/EMPLOYER' or otherwise in procuring the Contract or forbearing to do or having done any act in relation to the obtaining or execution of the contract or any other contract with the Government for showing or forbearing to show favour or disfavour to any person in relation to the contract or any other contract with the Government.

2.3 * BIDDERS shall disclose the name and address of agents and representatives and Indian

BIDDERS shall disclose their foreign principals or associates.

2.4 * BIDDERS shall disclose the payments to be made by them to agents/brokers or any other intermediary, in connection with this bid/contract.

2.5 * The BIDDER further confirms and declares to the 'BUYER/EMPLOYER' that the BIDDER has not engaged any individual or firm or company whether Indian or foreign to intercede, facilitate or in any way to recommend to the 'BUYER/EMPLOYER' or any of its functionaries, whether officially or unofficially to the award of the contract to the BIDDER, nor has any amount been paid, promised or intended to be paid to any such individual, firm or company in respect of any such intercession, facilitation or recommendation.

2.6 The BIDDER, either while presenting the bid or during pre-contract negotiations or before signing the contract, shall disclose any payments he has made, is committed to or intends to make to officials of the 'BUYER/ EMPLOYER' or their family members, agents, brokers or any other intermediaries in connection with the contract and the details of services agreed upon for such payments.

2.7 The BIDDER will not collude with other parties interested in the contract to impair the transparency, fairness and progress of the bidding process, bid evaluation, contracting and implementation of the contract.

2.8 The BIDDER will not accept any advantage in exchange for any corrupt practice, unfair means and illegal activities.

2.9 The BIDDER shall not use improperly, for purposes of competition or personal gain, or pass on to others, any information provided by the 'BUYER/ EMPLOYER' as part of the business relationship, regarding plans, technical proposals and business details, including information contained in any electronic data carrier. The BIDDER also undertakes to exercise due and adequate care lest any such information is divulged.

2.10 The BIDDER commits to refrain from giving any complaint directly or through any other manner without supporting it with full and verifiable facts.

2.11 The BIDDER shall not instigate or cause to instigate any third person to commit any of the actions mentioned above.

2.12 If the BIDDER or any employee of the BIDDER or any person acting on behalf of the BIDDER, either directly or indirectly, is a relative of any of the officers of the 'BUYER/EMPLOYER' or alternatively, if any relative of an officer of the 'BUYER/EMPLOYER' has financial interest/stake in the BIDDER's firm, the same shall be disclosed by the BIDDER at the time of filing of tender.

2.13 The term 'relative' for this purpose would be as defined in Section 6 of the Companies Act 1956.

2.14 The BIDDER shall not lend to or borrow any money from or enter into any monetary dealings or transactions, directly or indirectly, with any employee of the 'BUYER/EMPLOYER'.

3. PREVIOUS TRANSGRESSION

3.1 The BIDDER declares that no previous transgression occurred in the last three years immediately before signing of this Integrity Pact, with any other company in anycountry in respect of any corrupt practices envisaged hereunder or with any Public Sector Enterprise in India or any Government Department in India that could justify bidder's exclusion from the tender process.

3.2 The BIDDER agrees that if it makes incorrect statement on this subject, BIDDER can be disqualified from the tender process or the contract, if already awarded, can be terminated for such reason.

4. BID SECURITY DECLARATION

4.1 While submitting Price Bid, the BIDDER shall submit a Bid Security Declaration as per the **Form No-6 (BID SECURITY DECLARATION)** enclosed.

4.2 The Bidder may be disqualified/blacklisted from bidding for any contract with IIMK for a period of one year from the date of notification of bid, if the bidder is found to be in a breach of any obligation under the bid conditions agreed to in the Bid Security Certificate.

4.3 In case of the successful BIDDER, a clause would also be incorporated in the Article pertaining to Performance Security in the Project Contract that the provisions of Sanctions for Violation shall be applicable for forfeiture of Performance Security in case of a decision by the 'BUYER/EMPLOYER' to forfeit the same without assigning any reason for imposing sanction for violation of this Pact.

5. Sanctions for Violations

5.1 Any breach of the aforesaid provisions by the BIDDER or any one employed by itor acting on its behalf (whether with or without the knowledge of the BIDDER) shall entitle the 'BUYER/EMPLOYER' to take all or any one of the following actions, wherever required: - To immediately call off the pre contract negotiations without assigning any reason or giving any compensation to the BIDDER. However, the proceedings with the other BIDDER(s) would continue.

5.2 Security Deposit/Performance Bond (after the contract is signed) shall stand forfeited either fully or partially, as decided by the 'BUYER/EMPLOYER' and the 'BUYER/

EMPLOYER' shall not be required to assign any reason therefore.

5.3 To immediately cancel the contract, if already signed, without giving any compensation to the BIDDER.

5.4 To recover all sums already paid by the 'BUYER/EMPLOYER', and in case of an Indian BIDDER with interest thereon at 2% higher than the prevailing Prime Lending Rate of State Bank of India, while in case of a BIDDER from a country other than India with interest thereon at 2% higher than the LIBOR. If any outstanding payment is due to the BIDDER from the 'BUYER/EMPLOYER' in connection with any other contract, such outstanding payment could also be utilized to recover the aforesaid sum and interest.

5.5 To encash the advance bank guarantee and performance bond/warranty bond, if furnished by the BIDDER, in order to recover the payments, already made by the 'BUYER/EMPLOYER', along with interest.

5.6 To cancel all or any other Contracts with the BIDDER. The BIDDER shall, be liable to pay compensation for any loss or damage to the 'BUYER/EMPLOYER' resulting from such cancellation/rescission and the 'BUYER/EMPLOYER' shall be entitled to deduct the amount so payable from the money(s) due to the Bidder.

5.7 To debar the bidder from participating in future bidding processes for a minimum period of five years, which may be further extended at the discretion of the 'BUYER/EMPLOYER'.

5.8 To recover all sums paid in violation of this Pact by BIDDER(s) to any middleman or agent or broker with a view to securing the contract.

5.9 In cases where irrevocable Letters of Credit have been received in respect of any contract signed by the 'BUYER/EMPLOYER' with the BIDDER, the same shall not be opened.

5.10 Forfeiture of Performance Guarantee in case of a decision by the 'BUYER/ EMPLOYER' to forfeit the same without assigning any reason for imposing sanction for violation of this Pact.

5.11 The 'BUYER/EMPLOYER' will be entitled to take all or any of the actions mentioned at para 6.1(i) to (x) of this Pact also on the Commission by the BIDDER or any one employed by it or acting on its behalf (whether with or without the knowledge of the BIDDER), of an offence as defined in Chapter IX of the Indian Penal code, 1860 or Prevention of Corruption Act, 1988 or any other statute enacted for prevention of corruption.

5.12 The decision of the 'BUYER/EMPLOYER' to the effect that a breach of the provisions of this Pact has been committed by the BIDDER shall be final and conclusive on the BIDDER. However, the BIDDER can approach the Independent Monitor(s) appointed for the purposes of this Pact.

6. **Fall Clause**

   6.1   The BIDDER undertakes that it has not performed/is not performing similar project at a price lower than that offered in the present bid in respect of any other Ministry/Department of the Government of India or PSU and if it is found at any stage that similar project was performed by the BIDDER in any other Ministry/Department of the Government of India or a PSU at a lower price, then that very price, with due allowance for elapsed time, will be applicable to the present case and the difference in the cost would be refunded by the BIDDER to the 'BUYER/EMPLOYER', if the contract has already been concluded.

7 **Independent External Monitor**

   7.1   The 'BUYER/EMPLOYER' has appointed the following Independent External Monitor (hereinafter referred to as Monitor) for this Pact in consultation with the Central Vigilance Commission

         Name and Address of the Monitor:

         a) Dr. Kshatrapati Shivaji
             A-5, Tower-8, New Moti Bagh,
             New Delhi-110 023
             Mob. No. +8208522222

         b) Shri Mathew C. Kunnumkal
             Plot No. 20, Surya Nagar, Karkhana,
             Secunderabad, Telangana-500 009
             Mob. No. 9000017379

   7.2   The task of the Monitor shall be to review independently and objectively, whether and to what extent the parties comply with the obligations under this Pact.

   7.3   The Monitor shall not be subject to instructions by the representatives of the parties and perform his functions neutrally and independently.

   7.4   Both the parties accept that the Monitor has the right to access all the documents relating to the project/bidding, including minutes of meetings.

   7.5   As soon as the Monitor notices, or has reason to believe, a violation of this Pact, he will so inform the Authority designated by the 'BUYER/EMPLOYER'.

   7.6   The BIDDER(s) accepts that the Monitor has the right to access without restriction to all Project documentation of the 'BUYER/EMPLOYER', including that provided by the BIDDER. The bidder will also grant the Monitor, upon his request and demonstration of a valid interest, unrestricted and unconditional access to his project documentation. The same is applicable to Subcontractors. The Monitor shall be under contractual obligation

to treat the information and documents of the BIDDER/Subcontractor(s) with confidentiality.

7.7 The 'BUYER/EMPLOYER', will provide to the Monitor sufficient information about all meetings among the parties related to the Project provided such meetings could have an impact on the contractual relations between the parties. The parties will offer to the Monitor the option to participate in such meetings.

7.8 The Monitor will submit a written report to the designated Authority of 'BUYER/EMPLOYER' within 8 to 10 weeks from the date of reference or intimation to him by the BUYER / EMPLOYER / BIDDER and, should the occasion arise, submit proposals for correcting problematic situations.

8 Facilitation of Investigation

In case of any allegation of violation of any provisions of this pact or payment of commission, the 'BUYER/EMPLOYER' or its agencies shall be entitled to examine all the documents including the Books of Accounts of the BIDDER and the BIDDER shall provide necessary information and documents in English and shall extend all possible help for the purpose of such examination.

9 Law and Place of Jurisdiction

This Pact is subject to Indian Law.' The place of performance and jurisdiction is the seat of the 'BUYER/EMPLOYER'

10 Other Legal Actions

The actions stipulated in this Integrity Pact are without prejudice to any other legal action that may follow in accordance with the provisions of the extant law in force relating to any civil or criminal proceedings.

11 Validity

11.1 The validity of this Integrity Pact shall be from date of its signing and extend upto 5 years or the complete execution of the contract to the satisfaction of both the 'BUYER/EMPLOYER' and the BIDDER, including warranty period, whichever is later. In case BIDDER is unsuccessful, this Integrity Pact shall expire after six months from the date of the signing of the contract.

11.2 Should one or several provisions of this Pact turn out to be invalid, the remainder of this Pact shall remain valid. In this case, the parties will strive to come to an agreement to their original intentions.

11.3 If the BIDDER is a partnership or a consortium, this agreement must be signed by all partners or consortium members.

12 The parties hereby sign this Integrity Pact at _____on _____

BUYER/EMPLOYER   BIDDER
Name of the Officer   CHIEF EXECUTIVE OFFICERand Designation
Witness   Witness

1. _____   1._____

2. _____   2._____