



**THE INSTITUTE OF
Company Secretaries of India**
IN PURSUIT OF PROFESSIONAL EXCELLENCE
Statutory body under an Act of Parliament

OPEN TENDER-TWO BIDS SYSTEM

Tender No.: ICSI/IT/ BPR/2025-26/127

**RFP For “Design, Development, Delivery,
Implementation and Maintenance of a Single
Sign-on Integrated Software System for
Students, Members, Employees and other
Stakeholders through Business Process
Reengineering (BPR)”**

Tender Opening Date: February 16, 2026

Tender Closing Date: March 10, 2026 by 2.30 pm



THE INSTITUTE OF Company Secretaries of India

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HQ: ICSI HOUSE, 22, INSTITUTIONAL AREA, LODI ROAD NEW DELHI-110003
ICSI NOIDA OFFICE: ICSI HOUSE, C-36, SECTOR-62, NOIDA-201309 (UP)

RFP No.: ICSI/IT/ BPR/2025-26/127

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Sub: RFP For "Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)"

Important Date & Information		
1	RFP Publish Date	February 16, 2026
2	Cost of RFP	Rs.1,180/- (Rs. 1,000/- + 18% GST) (Rupees One Thousand One Hundred and Eighty Only)
3	Earnest Money Deposit (EMD)	Rs. 50,50,000/- (Rupees Fifty Lakhs Fifty Thousand only)
4	Last date and time for Sending Pre-Bid Queries	All queries have to be sent at sudhakar.venkata@icsi.edu by 02:00 PM till February 23, 2026.
5	Replies of Pre-Bid queries	If any, will be uploaded on the following website/portal on or after February 25, 2026 at 4:00 PM on website of the Institute (www.icsi.edu).
6	Pre-Bid Meeting date, time & venue	Date & Time: February 26, 2026 at 03:00 PM The Institute of Company Secretaries of India, ICSI House, C – 36, Sector – 62, Noida – 201309
7	Last Date of Submission of Bids	March 10, 2026 by 02:30 PM
8	Address for submission of Bids	The Institute of Company Secretaries of India, ICSI House, C – 36, (Ground Floor: RFP Box), Sector – 62, Noida – 201309 Note: Bidders are also required to submit the complete soft copy of the technical bid via a downloadable link sent to the designated email ID purchase@icsi.edu . The financial bid (soft copy) is not to be submitted by email till further notification
9	Bid Validity	180 days from the date of opening of bids
10	Date, time & Venue of opening of Technical Bids.	Date: March 10, 2026 at 03:00 PM The Institute of Company Secretaries of India, ICSI House, C – 36, (5th Floor: Tender Box), Sector – 62, Noida – 201309
11	Date and time of opening of commercial bids.	To be intimated at a later stage, only to technically qualified bidders.
12	Contact details	Praveen Kumar Veyikandla, Joint Director (IT), ICSI, Tel. No.:0120-4522066 Email Id: praveen.kumar@icsi.edu
13	Institute Website	https://www.icsi.edu/tenders/

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Statement of Disclaimer

The information contained in this RFP Document or subsequently provided to Bidder(s) whether verbally or in documentary form by or on behalf of Institute of Company Secretaries of India (hereinafter "ICSI" / "Institute") or by any of their employees or advisors, shall be subject to the terms and conditions set out in this RFP Document and all other terms and conditions subject to which such information is provided. The purpose of this RFP document is to provide the Bidder(s) with information to assist the formulation of their proposals. This RFP Document does not purport to contain all the information each bidder may require. This RFP document may not be appropriate for all persons, and it is not possible for the ICSI, their employees or advisors to consider the investment objectives, financial situation and particular needs of each bidder who reads or uses this RFP document. Each bidder should conduct its own investigations and analysis and should check the accuracy, reliability and completeness of the information in this RFP document and where necessary obtain independent advice from appropriate sources. ICSI, its employees and advisors make no representation or warranty and shall incur no liability under any law, statute, rules or regulations as to the accuracy, reliability or completeness of the RFP document. ICSI may in their absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this RFP Document.



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RFP No.: ICSI/IT/BPR/2025-26/127

February 16, 2026

OPEN TENDER-TWO BIDS SYSTEM

Sub: RFP For "Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)"

1. INTRODUCTION:

The Institute of Company Secretaries of India (herein after referred as ICSI / Institute) is a statutory body constituted under an Act of Parliament i.e. Company Secretaries Act, 1980. ICSI is functioning under the overall administrative jurisdiction of Ministry of Corporate Affairs, Government of India, and having its head office at "ICSI House", 22, Institutional Area Lodi Road New Delhi. The Institute has another office at C-36, Sector - 62, Noida. ICSI is the only recognized professional body in India to regulate and develop the profession of Company Secretaries in India.

ICSI invites RFP from interested vendors to implement BPR initiative in ICSI. Sealed quotations are invited by the ICSI for **RFP For "Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)"** for its office at "ICSI House", C-36, Sector - 62, Noida, Uttar Pradesh-201309.

Sealed tenders are invited by the Institute of Company Secretaries of India (Institute) for **RFP For "Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)"** as per the details given in the Part 'A', 'B' & 'C' of the Tender Document. *The terms and conditions governing the instant Tender are as under:*

DEFINITIONS

- i) The "ICSI" / "Institute" means THE INSTITUTE OF COMPANY SECRETARIES OF INDIA, New Delhi.
- ii) The "Contract" means Agreement executed between the ICSI and successful bidder for **"Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)"**.
- iii) "Bidder" or "Tenderer" means the agency/firm that is engaged in the business of **"Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)"** and applies in response to this notice inviting RFP.
- iv) "Vendor" means the successful bidder, who is engaged by ICSI for **"Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)"** through this RFP process by entering into the contract with the ICSI.

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- v) The words “EOI”, “Bid”, “RFP”, “Quotation”, “Tender” to be read inter alia and the words have been used inter-changeably. Therefore, the words may be understood and interpreted correctly as may be best applicable.
- vi) The words “Contract”, “Agreement”, “Order” to be read inter alia and the words have been used inter-changeably. Therefore, the words may be understood and interpreted correctly as may be best applicable.
- vii) “Party” means ICSI or Vendor individually and “Parties” shall mean ICSI and Vendor collectively.
- viii) “Letter of Intent” means the communication of the intention of the ICSI to the vendor for the award of work read with tender documents.
- ix) “Work Order” means the order placed by the ICSI to the vendor signed by the authorized officer of ICSI including all attachments and appendices thereto and all documents incorporated by reference therein. Work order along with the Letter of Intent, if any and tender documents and the agreement constitutes the contract.



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Part 'A'

I. Instruction to Bidders

1. The Institute of Company Secretaries of India (ICSI) is seeking RFP from reputed vendors having expertise to provide service for **"Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)"**. The tender document can be downloaded from **February 16, 2026 to March 10, 2026** (till 01:00 PM) from the website of the Institute (<https://www.icsi.edu/tenders/>) or Central Public Procurement Portal (CPPP) (<https://eprocure.eov.in/epublish/app>) for which Bidder would be required to enclose a demand draft of **Rs. 1,180/- (Rs. 1,000/- + Rs. 180/- for 18% GST)** (non-refundable) from any of the scheduled bank drawn in favour of **"THE INSTITUTE OF COMPANY SECRETARIES OF INDIA"** payable at New Delhi. The bidder can also make online payment of **Rs. 1,180/- (Rs. 1,000/- + Rs. 180/- for 18% GST)** by using following online link: **"<https://apps.icsi.edu/TenderApp/>"** and enclose the receipt of online payment generated by the system towards the cost of the tender document along with the bid. The bidder who fails to submit the cost of the tender document along with the bid, their bid shall not be considered for evaluation and no further communication shall be entertained in this regard. If any discrepancies found in the downloaded version of the tender document, the latest version of the tender document published by the ICSI through website notification at **Institute's website: <https://apps.icsi.edu/TenderApp/>** will be treated as authentic and correct.

Bidders irrespective of their registration with NSIC have to submit the requisite fee towards the cost of Tender.

2. Earnest Money Deposit (EMD)

- i. Every bidder has to make a deposit of Earnest Money (EMD) of Rs. 50,50,000/- (Rupees Fifty Lakhs Fifty Thousand only) in the form of Demand Draft from any of the nationalised/scheduled bank drawn in favour of **"THE INSTITUTE OF COMPANY SECRETARIES OF INDIA"** payable at New Delhi. The bidder can also make online payment of the EMD using following online link: **"<https://apps.icsi.edu/TenderApp/>"** and enclose the receipt of online payment generated by the system with the bid.
- ii. Tenders received without the prescribed Earnest Money Deposit (EMD) shall not be entertained and shall be rejected summarily.
- iii. **The EMD of the successful bidder can either be converted as part of the performance security on request of the bidder or will be refunded after receipt of Performance Guarantee/Security. In case, the selected bidder/vendor opts to convert the EMD to be part of the performance security, balance amount towards the performance security is to be submitted by the selected bidder / vendor with the ICSI in the form of bank guarantee from nationalised bank immediately within seven (07) days of issue of work order but before execution of the agreement. The EMD of the unsuccessful bidders will be refunded without any interest/Bank commission/collection charges within 30 days after award of the contract / work order to the successful bidder. The balance of the performance security amount by the successful bidder can also be submitted through demand draft issued from any of the nationalised bank drawn in favour of "THE INSTITUTE OF COMPANY SECRETARIES OF INDIA" payable at New Delhi.**



(Note: The bidders having valid registration with NSIC may avail exemption from submission of EMD but must enclose valid NSIC certificate/document in envelope No. 1 instead of EMD demand draft).

3. Forfeiture of EMD:

The EMD of the bidders shall be forfeited in the following circumstances: -

- i. the bidder withdraws its bid;
- ii. the selected bidder does not accept the Purchase / Work Order;
- iii. the selected bidder fails to supply goods / services as per the terms of the Tender and Purchase / Work Order.
- iv. any other justified reasons e.g. misleading or wrong information in the Bid, violation of the terms and conditions of the Tender, involvement in forming ring/cartel, submission of multiple bids in different names etc.

The sealed tenders are to be submitted in prescribed format on the bidder's business letter head duly stamped, signed and dated on each page of Part 'A' & 'B' and 'C' as a token of the bidder's unconditional acceptance to the terms prescribed by the Institute. Details/supporting documents wherever applicable, if attached with the tender must be duly authenticated by the bidder. ICSI shall reserve its discretion to decide on authenticity/ validity of the over-writing without prejudice to its any other right. **Every page of the Tender document must be signed, stamped and submitted with the Tender by bidder.**

- 4. Bid Submission:** Each bidder shall submit the tender in three separate sealed envelopes,
 - (i) **EMD & Tender Fee is to be put in envelope No. 1** (please mark the envelope as "**No. 1 – EMD & Tender Fee**"),
 - (ii) **Part 'A' & 'B' including Form I (Annexure A), Form II (Annexure B), Form III (Annexure C), Annexure D, and Annexure F to Annexure H along with all requisite documents are to be put in envelope No. 2** (please mark the envelope as "**No. 2 – Technical Bid**"),
 - (iii) **Part 'C' (Annexure E) only is to be put in Envelope No. 3** (Please mark the Envelope as "**No. 3 – Financial Bid**").
 - (iv) **All the sealed envelopes bearing No. 1, 2 and 3 are to be put in the main envelop i.e. Envelope No. 4.**
- 5.** The bidders must mention the price details in the prescribed format of price bid which is to be put in the sealed envelope as instructed at Sr. No. 5 above. The bidders should ensure that price details are not mentioned anywhere, except the prescribed price bid format. In case, during the evaluation it is found that the bidder has mentioned the price details anywhere, other than the prescribed price bid; the bid submitted by such bidder shall be out rightly rejected.
- 6.** The sealed tender envelope duly super scribed, RFP For "**Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)**" due on **March 10, 2026** must be addressed to **Secretary, ICSI** and be sent at the Institute's address given below either by registered post/speed post/courier or by dropping in the tender box placed at Ground floor of Institute's Noida office address as mentioned below & should reach on or before **02:30 PM on March 10, 2026**.



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Address:

Secretary

The Institute of Company Secretaries of India

ICSI House, C-36, **(Ground Floor: Tender Box of Dte. of Purchase)**

Sector-62

Noida – 201309 (UP)

The Institute shall not be liable for any transit delays whatsoever and tenders received after the stipulated time/date are liable to be rejected summarily without assigning any reason and without any further reference to the Bidder.

Note: The technical bid soft copy (complete in all respect) is also to be submitted by the bidders through downloadable link and such download link is to be shared on the following email id: purchase@icsi.edu. Financial bid (soft copy) is not to be submitted by email till further notification.

7. The **Technical Bid shall be opened on March 10, 2026 at 03:00 PM** or any other date and time as notified later on **ICSI website (tender page)** in the Institute of Company Secretaries of India at ICSI House, C-36, Sector-62 Noida 201309 or any other place as notified later on **ICSI website (tender page)** in the presence of those bidder(s), who wish to be present. In case of situations like lockdown, ICSI may decide to open the bids on electronic mode. Mode, Date & time of opening of bids will be informed through the e-mail id to those who requests for the same and also be notified on the on ICSI's website (www.icsi.edu). No separate communication will be sent in this regard through any other mode of communication. **In the event of due date being a closed holiday or declared Holiday for ICSI-HQ / Central Government offices, or due to the lockdown condition, the due date and time for opening of the bids can be changed on the sole discretion of ICSI which will be notified only at the ICSI website (tender page).**
8. The GST has rolled out with effect from 01.07.2017. For implementation of GST in ICSI, bidders who have not migrated to or registered with GST regime will not be eligible to participate in any tender of the Institute. Any offer received from the bidder without GST registration details will be summarily rejected.
9. The Bidder is expected to examine all instructions, forms, terms and specifications in the bidding documents. Failure to furnish all information required by the bidding documents may result in the rejection of its bid and will be at the bidder's own risk.
10. The bid prepared by the Bidder, as well as all correspondence and documents relating to the Bid exchanged between the Bidder and the ICSI shall be in English. The bidders shall provide details of their contact person, telephone, fax, email and full address(s) to ensure that replies to their Bids could be conveyed promptly.
11. All costs and expenses incurred by the bidders in any way associated with the development, preparation, and submission of responses, including but not limited to; the attendance at meetings, discussions, demonstrations, etc. and providing any additional information ~~required by ICSI to facilitate the evaluation process, and in negotiating a definitive Service~~ RFP For "Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)".



Agreement or all such activities related to the empanelment process, will be borne entirely and exclusively by the Bidder.

12. The bidders are required to submit all the requisite documentary evidence in support of the eligibility criteria and as per afore-mentioned terms and conditions. If any of the requisite documents are not submitted as per format prescribed in this tender, the RFP submitted by the bidder will be summarily rejected.
13. All the bidders automatically agree with ICSI to honor all aspects of fair-trade practices in executing the works assigned by ICSI.
14. ICSI shall have the right to assess the competencies and capabilities of the bidder by going through the credentials given in the Technical Bid and on the basis of such credentials, ICSI may reject the candidature of the bidder without assigning any reason. In such case(s) the Financial Bid shall not be opened for that particular bidder. The Financial Bid of only those bidders who qualify in the technical scrutiny shall be opened and time and date for opening the Financial Bid shall be communicated separately.
15. The RFP shall be typed or written in indelible ink and shall be signed and sealed by the person duly authorized by the bidder. The person(s) signing the RFP shall initial all pages of the RFP with seal, except for un-amended printed literature. The RFP without the seal and signatures in all pages of all documents are to be disqualified.
16. RFP sent through Telex/Telegrams/Fax/e-mail will not be accepted. RFP Completed in all aspects should reach ICSI on or before the last date by registered post or speed post or courier only. ICSI will not be responsible for any postal delays. RFP submitted in person will also be accepted.
17. During the process of evaluation of its technical proposal, the bidder may be required to make presentation to ICSI on its proposal covering Experience/Technical Proposal including understanding the scope of work set out in the tender/RFP, Implementation Methodology, Team Composition, Work Schedule, and Activity Schedule, arrange client interactions / visits. The date and time of the presentation / interactions with ICSI will be intimated to the bidder/vendors separately. Further, during evaluation of the RFP, the ICSI may at its discretion, ask the Bidder for clarification of its RFP and the same has to be provided within the time period as specified by ICSI and in case of a default it will be deemed that Bidder has no clarification to submit and the RFP is liable to be evaluated and/or rejected accordingly. The request for clarification and the response shall be in writing.
18. ICSI may call for any additional documents from the participating bidders during the technical evaluation process to establish their eligibility. ICSI may also call for further technical clarification on the proposals submitted by the bidders.
19. Bidders in the form of consortium and/or joint venture will not be allowed to participate in the bidding process. Bidders forming a cartel or multiple bids submitted by a single bidder, even though the name of the bidder is different, but, if their Promoter(s)/Director(s) are same, will



not be entertained and if any bid is submitted by such kind of bidders, the same will be rejected without any further notice to the bidder(s).

20. ICSI reserves the right of accepting the bid in whole or in part without assigning any reason and such decision shall be final. The part acceptance of the bid shall not violate the terms and conditions of the tender documents and the bidder shall execute the work at the specified rates without any extra charges or compensation within the stipulated period.
21. Incomplete bids shall be rejected outrightly. No alterations, amendments or modifications shall be made by the Bidder in the Tender documents and if any such alterations are made or any special conditions attached, the bid shall be liable to be rejected at the discretion of the ICSI without reference to the bidder. Tampering with any format given may be liable for rejection / disqualification of the bids. Correction and overwriting anywhere in the tender document should be avoided. Every correction and overwriting must be authenticated with full signature of the bidder, otherwise the tender is liable to be rejected. Decision of ICSI on such corrections, overwriting, authentications shall be final and binding on the concerned bidder. Please note that all the information as desired needs to be provided. Incomplete information may lead to rejection of Bid.
22. Each Bidder acknowledges and accepts that ICSI may in its absolute discretion apply selection criteria specified in the tender document for evaluation of proposals for short listing / selecting the eligible vendor(s). All Bidders on responding to ICSI for this tender will be deemed to have accepted the terms of this tender document. Non acceptance of any of the terms & conditions as stated in Tender document and non-submission of the stipulated Earnest Money Deposit (EMD) shall render the Bid invalid.
23. The Institute reserves the right to accept or reject any or all the tenders including the lowest tender(s) without assigning any reason or to cancel the whole tender process at any stage without assigning any reason whatsoever at its sole discretion prior to award of Contract, without thereby incurring any liability to the affected Bidders or any obligation to inform the affected Bidders of the grounds for the ICSI's action. The decision of the Institute will be final and binding on all concerned.
24. In the interest of the Institute, ICSI at its discretion may include or exclude any bidder who has served/worked for the ICSI by executing any similar contract through tender/RFP in recent past. Such inclusion or exclusion of bidder shall be decided during technical evaluation of the bids of this tender process.
25. The Bidder who was awarded any contract in the past by the Institute but terminated during the contract period due to unsatisfactory performance will not be eligible /considered to participate in this tender. Also, a bidder who was awarded any contract earlier but refused to continue the contract/refused to sign the agreement as given by the Institute will not be eligible to participate in this tender.
26. The decision to accept any bid submitted shall rest with the ICSI. ICSI does not bind itself to accept the lowest bidder and reserves to itself the right to reject any or all the bids received



without assigning any reason(s) whatsoever and without any notice to the Bidder(s). Non acceptance of any bid shall not make the ICSI liable for compensation or damages of any kind. ICSI further reserves the right to accept a bid other than the lowest or to annul the entire bidding process with or without notice or reasons. Such decisions of ICSI shall be final and shall bear no liability whatsoever consequent upon such decisions.

27. The Institute shall not be bound to declare a technically qualified bidder whose financial bid is evaluated as lowest one as successful bidder. Lowest financial bid is not the sole criteria to award the contract to the technically qualified bidder. The Institute reserves its right to award the contract to the vendor who in its opinion is most suitable to complete the contract.
28. At any time prior to the last date for receipt of bids, the ICSI, may, for any reason, whether at its own initiative or in response to a clarification requested by the bidders, modify the tender/RFP document by issuing an addendum/corrigendum. The amendments shall be notified on ICSI's web site, i.e. <https://www.icsi.edu> and these amendments will be binding on all the Bidders. Any such addendum/corrigendum issued along with the original tender document will constitute revised tender/RFP. The addendum/corrigendum will be uploaded on the ICSI website. The bidders are requested to visit the website frequently to check for any amendments. Any Corrigendum, Clarifications etc. shall be binding on the Applicants and shall be given due consideration by them while they submit their RFPs.
29. In order to afford prospective Bidders a reasonable time to take the amendment into account in preparing their bids, ICSI, at its discretion, may extend the deadline for the submission of bids suitably.
30. The ICSI may at any time during the bidding process but before opening the technical bid request the Bidders to submit revised Technical Bids and/or Supplementary Bids, in case of change in Scope of Work, without thereby incurring any liability to the affected Bidder or Bidders.
31. This RFP does not commit ICSI to award a contract. Further, no reimbursable cost may be incurred by the bidders in anticipation of award of contract under this RFP/tender document. No binding legal relationship will exist between any of the Bidder and ICSI until execution of a contractual agreement.
32. **ELIGIBILITY CRITERIA:** To be eligible for technical evaluation of the proposed solution, the conditions which are to be necessarily fulfilled by the bidder are mentioned in **Annexure B: Form II: Eligibility Criteria Details**.
- All documents mentioned in **Annexure B: Form II: Eligibility Criteria Details** are required to be submitted along with the RFP. Non-submission of any documents or submission of incomplete, misleading or false information may render the bidder liable for rejection or cancellation of their bid.
33. **Evaluation of Bids:** For evaluation of bids, ICSI will resort to the Quality cum Cost Based System (QCBS) method of evaluation as detailed below:



Technical Bid:

- a. Proposals, which are not supported by adequate proof / Supplementary documents will not be evaluated. In order to facilitate the Technical Bid evaluation, the technical criteria laid down along with the assigned weights have been presented in the **Technical Evaluation Matrix (enclosed as Annexure D)**. The marking scheme presented is an indication of the relative importance of the evaluation criteria. Bids which don't secure the minimum specified technical score will be considered technically disqualified and will not be considered for financial evaluation and rejected without further intimation
- b. *A presentation is to be given by the eligible bidders before the technical evaluation committee formed for the purpose. The presentation will comprise of the following topics for the evaluation process:*

The presentation may be broadly on the following aspects/lines

- *About 30 minutes presentation/interaction regarding their understanding of scope of work*
 - *Proactive proposals/innovative ideas/solutions for smooth functioning.*
 - *Quality assurance of the deliverables.*
- c. *Evaluation of bidder's infrastructure, manpower, financial strength, technical expertise and experience in the relevant fields will be done through the information / documents provided as a part of the technical bids.*
 - d. *Evaluation of work experience in the relevant fields will be done through the information / documentary proofs such as client's certificate provided by the bidder as a part of the technical bids.*
 - e. *The minimum qualifying score in the technical evaluation is 70 (out of 100). Bidders scoring less than 70 will not be considered for further evaluation.*

Commercial Bids: The minimum qualifying score in the technical evaluation is 70 (out of 100). Bidders scoring less than 70 will not be considered for further evaluation. ICSI reserves its right to shortlist/restrict number of Bidders for further evaluation based on the score obtained by the bidders as per above technical evaluation matrix.

Scores of the Financial evaluation would be weighed pro-rata on a scale of 100 with the bidder with the lowest financial quote getting 100 (as per below mentioned formula). These Financial scores would then be added-up with the score of the technical evaluation as per below mentioned formula and the bidder getting the maximum total score out of 100 would be considered as the successful bidder and called for negotiations, if required.

Formula for Final Bid Evaluation is:

$$Bm = .7 (TM) + .3 (Fn)$$

$$Fn = (Fmin / Fb) * 100$$

where

Bm is total marks of the bidder in consideration

TM is Technical Marks of the bidder in consideration

Fn is Normalized financial score of the bidder in consideration

Fb is Evaluated Cost of bidder under consideration

Fmin is Minimum evaluated cost of any bidder



ICSI reserves the right to negotiate with the bidder whose bid has been ranked first on the basis of best score.

* For the purpose of Commercial Comparison, the cost quoted under BOQ heads would be considered as commercial proposals.

Note: Conditional bids will be rejected.

34. Non acceptance of any of the terms & conditions as stated in tender document and non-submission of the stipulated Earnest Money Deposit (EMD) shall render the Tender invalid. Only bidders whose Infrastructure/Technical experience particulars as stated in tender are determined to be in consonance with Institute's requirements shall be considered further in the Tender Evaluation Process.
35. The rates to be quoted by the bidder shall expressly be inclusive of all charges including statutory taxes, fees, cesses, duties, levies, charges, surcharges and other components, etc. (net to Institute) except GST. GST component shall have to be mentioned separately as per price bid format. No component of cost / tax shall be paid by the Institute unless the same is included specifically in the quotations.
36. **Bid Validity:** Price quoted must be valid for at least 180 days from the date of opening of technical bid. However, the prices finalized after opening the tenders shall not increase throughout the period of Contract. ICSI reserves its discretion to extend the validity of the Tender with the mutual consent of the concerned bidder.
37. In case of any work for which there is no specification given in the RFP but the same is essential for the job / work mentioned in RFP document, such work shall be carried out in accordance with the directions of the ICSI without any extra cost to the ICSI.
38. The ICSI may at any time during the tendering process but before or after opening the financial bid request the bidders to submit revised technical / financial bids and/or supplementary financial bids as per the process approved by the Competent Authority of ICSI, in case of change in Scope of Work or for any other reason, without thereby incurring any liability to the affected bidder or bidders.
39. In case of non-compliance by the bidder, of any of the terms and conditions as stated in the tender/RFP documents/Service Level Agreement (SLA) or if the Bidder withdraws or amends, impairs or derogates from the tender/RFP/Service Level Agreement (SLA) in any respect within the period of validity of the tender/RFP/Service Level Agreement (SLA) or if the bidder fails to execute the work as per the Tender/Work Order or fails to deliver satisfactory performance during the period of contract, or fails to execute agreed Service Level Agreement (SLA), ICSI shall have the right to invoke the said Bank Guarantee and to forfeit the security deposit / earnest money deposit and such decision of the ICSI shall be final and binding on parties.

II. Broad Scope of Work

1. Background

The Institute of Company Secretaries of India is constituted under the Company Secretaries Act, 1980 (Act No. 56 of 1980) to develop and regulate the profession of Company Secretaries in India.

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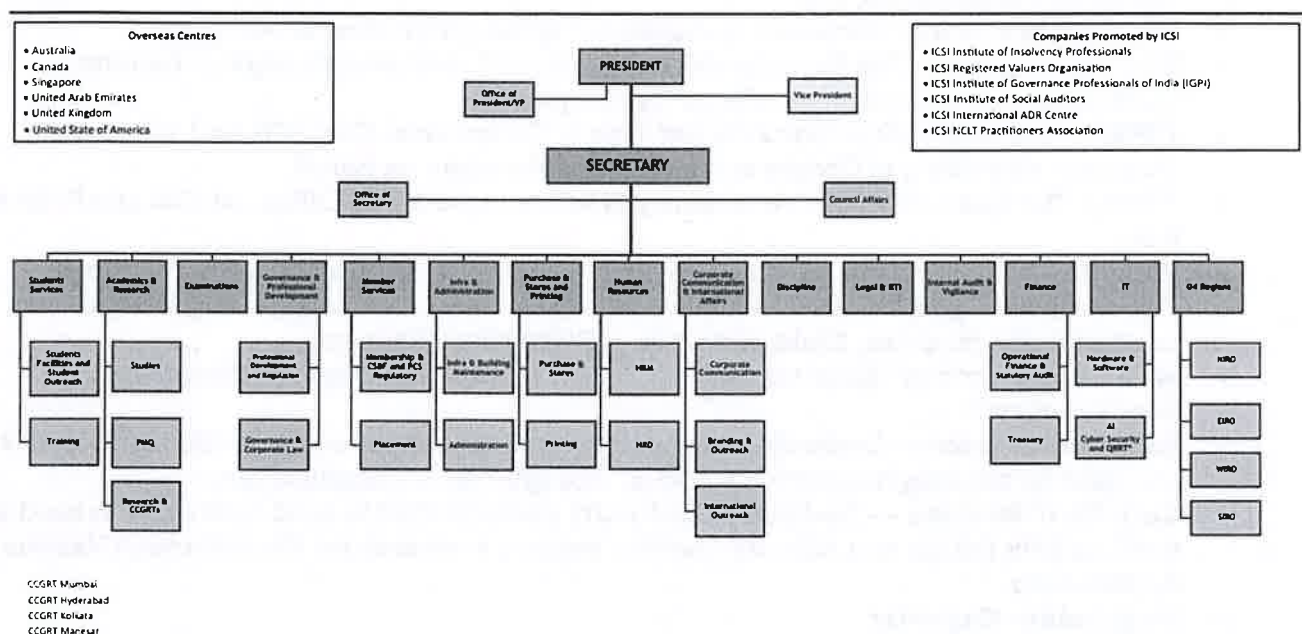


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The Institute has its Headquartered in New Delhi, the ICSI has a nationwide presence with four Regional Offices in New Delhi, Chennai, Kolkata and Mumbai, 73 Chapter Offices spread all across the country and Centre for Corporate Governance, Research and Training (CCGRT) in Mumbai, Hyderabad, Manesar and Kolkata. The Institute also has six overseas centres at Australia, Canada, Singapore, UAE, UK and USA. With over 75,000 members and around 200,000 students, the ICSI has the largest membership and student base of Company Secretaries in the world.

Organization structure



ICSI broadly utilizes multiple applications within its IT ecosystem to serve students, members, employees, and other stakeholders. These include:

- **SMASH Portal** – Manages the student lifecycle, CSEET registration, regular registration (Executive and Professional), exam enrolment, examinations, results processing, Denovo, Continue of Registration, switch-over, pre-exam tests, and the one-day/Three Days orientation program etc., exemptions, Roll Number Generation, Centre breaking, Admit card, Custom MIS Reports, SSRS Reports, examination module, switchover, Grievance Portal, E cart Portal, CSJ Journal Portal, CS Mittr portal, preregistration Module, Email Server, Payment Gateway Integration, Challan payment option, Custom Windows Utility, Chapter Dashboard, SIP, API integration, ODOP Dashboard. Data Synchronization Process internal as well as from third party etc.,
- **Stimulate Portal** – Online Membership services, ACS/FCS/COP registration, Licentiate, Instant membership, member search, Credit hours, Fees management, members demographic updation, Secretarial Executive Certificate issuance, membership restoration, defaulter process, firm management, Company registration for impart student training, complete student training life cycles including trainings i.e., long term, short term, CLDP, faculty management system, training switchover, TC certificate,



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- training exemptions, workflow system, MIS generation, CSBF, event management, ECSIN, UDIN, multi-location payment gateway system, and employee recruitment etc.,
- **eLearning Portal** – Provided through a third party (TCS) to support online learning.
 - **Oracle Enterprise Applications** – Handles finance, accounting, inventory, Order Management, and human resource functions etc.,
 - **Custom Applications** – Built on MS.Net and SQL Server on to support additional operational needs, PCS Skills Directory, Real Time Dashboard Analytics, Bulk Mail SMS Utility, MARS (Monthly Activity Report System), CAPs (Career Awareness Programme), remove attendance system, Gate pass module, real time data synch dash board ROs/Chapters, Remote Attendance Application for Chapter/RO/CCGRT, Label Generation Application, etc.,
 - **Share point Portal** – Document management system, workflow-based portal.
 - **Placement portal** - The Portal enables students and members to explore training opportunities and job listings offered by companies.
 - **DMSA** - This application caters Registration of Complaints, filing WS, and subsequent Workflow till issuing of Orders and publishing the same on portal.
 - **CRAS** – The Central Receipt Accounting System is used by all Offices of ICSI as a Point of Sale.
 - **Website** - ICSI website is powered by a content management system built on top of Python-based Django-CMS. Custom modules have been developed using Django-cms custom plugin modules, Child portals for CCGRTs/Ros/Chapters.
 - **WhatsApp Services** - Used for sending Bulk WhatsApp Message to stakeholders on User's request
 - **Bulk SMS Services** – Dedicated third party portal is used to send bulk SMS and its APIs are used for sending transactional SMS(s) through Various Applications.
 - **Bulk Mail Services** - – Dedicated third party portal is used to send bulk email is used for sending Bulk Emails and APIs are used for sending transactional Email through Various Applications.
 - **Stakeholder Capacity**

S.NO	Type of Stake holder	Total Number
1	Active Students	1,90,000(approx.)
2	Inactive Students	10,00,000 (approx.)
3	Members	79,000(approx.)
4	Permanent Employees	400 (approx.)
5	Contractual Employees	200 (approx.)
6	New Registrations per year	60,000 (approx.)
7	Dormant Users per year	10,000(approx.)

Existing IT Infrastructure:

1. ICSI Data Centre Management

- a. Managing Facility Management Service from vendor for ICSI Data Centre operations 24x7 with the NOCC team support.
- b. OP Manager tool for IT Infra health and services.
- c. IT Helpdesk (Manage Engine Tool) system for internal stakeholders for ticketing purpose and IT Asset Management.
- d. SOPHOS XDR end point security system for approx. 600 (540 for systems, 60 for Servers) license managed through cloud.
- e. 49 Servers at On Premises ICSI Datacentre having different OEM's, Make & Models.



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- f. 4 UTM/Firewalls made of SOPHOS XG 210/ Palo Alto PA 450 in HA configurations at ICSI HQ and Noida Office.
- g. Storage Device of 25 TB used for critical data protection and Image Level Backups.
- h. The Arc Serve OEM tool with the capability of 10 TB.
- i. Tape Library made of HPE Model MSL G3 Series.
- j. Daily Full backup of critical data of Servers.
- k. Wi-Fi devices Ruckus model 1205 at ICSI HQ Delhi and Ruckus model 2D1200 at ICSI Noida office.
- l. Existing application and database storage space:

S. No	Project Name	Application Storage (GB)	Database Storage (GB)
1	ERP Oracle	400	500
2	Share Point Portal	10	500
3	FMS		1000
4	SMASH PORTAL	2500	100
5	STIMULATE PORTAL	600	50
6	Website	200	50
7	Result Publish portal	150	5
	Total	3860	2205

2. IT Infrastructure Management (Procurement / AMC) HQ – Servers, Desktops, Laptops, Printers, Scanners, Projectors, Network Switches, System Software, Firewall, Anti- Virus, Network etc.
 - a. IT Infrastructure has been managed by team based on day-to-day requirements, initiate procurements, update software's, manage network services.
 - b. ICSI has WAN network connectivity at 7 offices. ISP is M/s TCL.
 - ICSI HQ Delhi office – 100 MBPS Primary ILL, 10 MBPS ILL Secondary, 10 MBPS MPLS primary/secondary.
 - ICSI NOIDA site – 200 MBPS Primary ILL, 20 MBPS ILL Secondary, 18 MBPS MPLS primary, 14 MBPS MPLS secondary.
 - ICSI NIRO, WIRO, EIRO, SIRO and CCGRT Mumbai – 3 MBPS MPLS.
3. IT Infrastructure validation and provisioning for ROs/Chapters requirements.
 - a. Dte. of IT takes necessary action against the requirements of ROs/COs related to IT like Desktops/Laptops/Printers/Scanner and Projectors etc.
 - b. Dte. of IT issues sanction order based on the IT policy and guidelines.
4. O365 Emailing & MS Teams (299 A1+ATP and 78 A3+ATP)
5. Facility Management Services in HQs and Ros.

To ensure the seamless and efficient operation of this world-class infrastructure, ICSI requires a fully integrated, uniform integrated solution, advanced IT ecosystem.

ICSI has embarked on the journey to consolidate its IT footprint to achieve seamless integration across the several information systems in its institute; intending to improve its effectiveness &

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efficiency at the same time. It currently runs a host of IT applications which carry out the day-to-day business.

Not only there are a lot of IT applications supporting ICSI's business today, but there is also a lot of manual intervention along with redundant effort to consolidate and reconcile data – posing challenges to the operations. Some of the challenges are highlighted below:

1. No single source of truth for data
2. No single sign on system
3. Minimal visibility into end-to-end operations
4. Consolidated dash boards
5. Limitation to integrate with next generation technologies
6. Easy access.
7. Data Integrity and synch issues.
8. Manual processes (people-dependency) with multiple points of integration
9. Missing MIS/reporting capabilities due to non-integrated IT landscape
10. Inconsistent student/ member experience.
11. Lack of an automated system for handling stakeholder queries from multiple channels.

For efficient management of all IT initiatives, it is essential that the Institute adopts effective Business Process Reengineering (BPR) implementation support to drive these projects. Such BPR implementation support will enable the Institute to leverage global best practices in successfully transforming and modernizing its IT systems and processes. The BPR support shall provide assistance in the following areas:

1. **Process Modelling & Re-engineering:** Redesigning existing workflows to eliminate redundancies and improve efficiency.
2. **Workflow Automation:** Implementing automated solutions to streamline operations across departments and stakeholders.
3. **Strategic Technology Consulting:** Advising on IT infrastructure, solution architecture, application platforms, and technology adoption.
4. **Training Needs Assessment:** Identifying skill gaps and designing training programs to support digital transformation.
5. **Systems Integration:** Ensuring seamless interoperability between legacy systems and new applications.
6. **Program & Project Management:** Applying structured methodologies to plan, monitor, and deliver IT initiatives effectively.
7. **Change Management:** Supporting organizational adaptation to new processes, systems, and technologies.
8. **Service Definition & SLA Design:** Establishing clear service parameters and performance benchmarks for IT-enabled services.
9. **Business Modelling & Financial Structuring:** Aligning IT initiatives with institutional goals and sustainable financial planning

2. Process Background: The Vendor through tendering process by ICSI will undertake study the processes related to the projects identified by ICSI and shall undertake the specified activities across each of the directorates of the Institute.

The Background Process in the context of Business Process Reengineering (BPR) refers to the underlying operational workflows, IT systems, and service delivery mechanisms currently in place at the Institute. These processes form the foundation upon which the BPR initiative will be implemented. They encompass the existing applications, manual practices, and departmental procedures that support students, members, employees, and other stakeholders.



The purpose of defining the background process is to:

- Establish the current state of operations and IT systems.
- Identify gaps, redundancies, and inefficiencies in workflows.
- Provide a baseline against which re-engineered processes can be measured.
- Ensure alignment between institutional objectives and redesigned solutions.
- Enable bidders to understand the scope of transformation required.

It is required to create an integrated Information and Communication Technology (ICT) environment to address the computing needs of the office automation system of ICSI. The study assignment needs to address the following aspects of the office automation system at the state:

1. Identification of appropriate tools, technologies and applications to automate the office functions of the state.
2. Creation of appropriate architectures for the identified solutions.
3. Creation of projects and project phases to implement the office automation solutions.
4. Creating project timelines.
5. Costing the designed solutions and estimating the budgetary requirements of the project.
6. Clearly bringing out the HW, System SW, Application SW, Cloud computing and Networking needs of the project.

3. Purpose of RFP

1. BPR involves fundamentally rethinking and restructuring workflows, systems, and organizational practices to eliminate redundancies and optimize performance.
2. The goal is not incremental improvement but transformational change—delivering faster, cost-effective, and customer-centric outcomes.
3. It challenges existing assumptions, leverages technology, and fosters cross-functional collaboration to create streamlined processes.
4. Qualitatively a new way of working would bring together both aspiring and existing company secretaries in the country to come together as a CS Parivar.
5. Create a single unified tightly integrated digital platform for catering to the entire community of company secretaries, irrespective of their geographical locations, delivered through a scalable and accessible cloud-based licensed platform.
6. Comprehensive 360-degree evaluation of the existing processes and benchmarking them with the best global practices across the world.
7. Recommend changes in the existing processes to meet global benchmarks.
8. Evolve a solution blueprint and roadmap of Digital Technology that should be used to transform ICSI into a truly Efficient, Transparent and Global organization.
9. Integrate with the latest technologies like Artificial Intelligence, Mobile apps, Chatbot, ChatGPT, WhatsApp Services/channels, cloud computing and any future development of new era.
10. Integration of all guidelines in the modules to develop and implement.
11. Automate the workflow system of the internal functioning and administrative matters of the Institute, such as movement of various types of internal communications among the directorates and secretariat to ensure smooth working and quick action.
12. Provide all the online services through single uniform integrated Web based application as well as mobile app.
13. Take care of all sister concerns of the ICSI like IIP, RVO, ICSI IADR, ICSI ISA, IGPI etc in the BPR process.
14. Implement Centralized Backup system of all IT devices and emailing system in use in the offices of the Institute.

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15. Solution for employees/staff to be login through credentials and access/work with their work environment and data from any system/desktop/laptop connected in ICSI Network Domain at HQ/Noida offices.
16. The system shall support integration with e-mail, SMS gateways, Payment gateways, Digital Signatures and other accounts to be provided by Department
17. The system should be mobile responsive.
18. The system shall support Alert Mechanisms (Reminders, Notifications), Escalation Mechanisms (Flexible routing of files, Calling back the files by the superior)
19. Should support on premise/cloud hosting
20. The selected bidder shall ensure that the system complies with defined industry standards (their latest versions as on date) as applicable. This will apply to all aspects of solution including but not limited to its design, development, security, installation and testing. The suggested architecture must be scalable and flexible for modular expansion. The system shall allow ease integration with software / applications developed using common industry standards since the solution may be linked and connected to other sources (websites, contents, portals, systems of other user departments etc.) as well as there may be loose/tight integration with backend system of other departments depending on individual service processes. The solution architecture should thus have provision to cater to the evolving requirements of the Department.

To realize the vision, ICSI needs to align its IT platform to specific business objectives / intentions

1. Aligning IT Strategy to stated Business Objectives / Wish list from stakeholders:
 - a. Interact with stakeholders of the Institute to understand the current pain points in the IT landscape, capture the wish list and business objectives.
2. Assess current state Enterprise IT Infrastructure and Applications Portfolio:
 - a. How capable is the current IT environment to cater to the needs of the stakeholders?
3. Perform Gap Analysis between current and future state wish list and design a future state Enterprise IT Infrastructure and Applications Portfolio:
 - a. Where are the opportunities for improvement?
4. Develop a comprehensive IT Strategy and Roadmap for the Institute to realize the Vision:
 - a. What does it take to realize the Vision and what would it cost?
 - b. When can the promise be delivered?

Why require BPR of IT systems

1. Demands from increasing regulatory and compliance requirements:
 - a. How are the students and members getting trained on the developing trends in the industry of interest in order to stay competitive?
 - b. How flexible are internal processes and IS systems to take on the challenges?
2. Increased Integration of the Marketplace
 - a. How quickly can ICSI respond to new expectations from stakeholders? How correct and complete is the information being shared?
 - b. What is the turnaround time to get the "right information"? Do the current IS Systems have such information in them?
3. Handle Scale of Operations
 - a. How many students and members 5-10 years from now?
 - b. Will the current processes and IS Systems scale to handle such volume and resulting expectations?
4. To improve and optimize the interactions with the Institute while ensuring high turn around in service times.

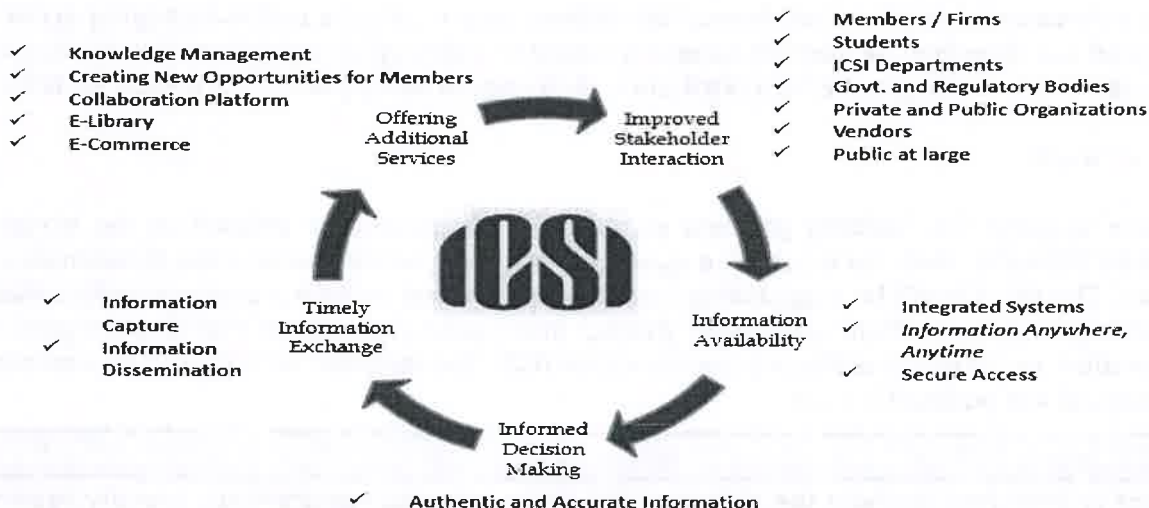


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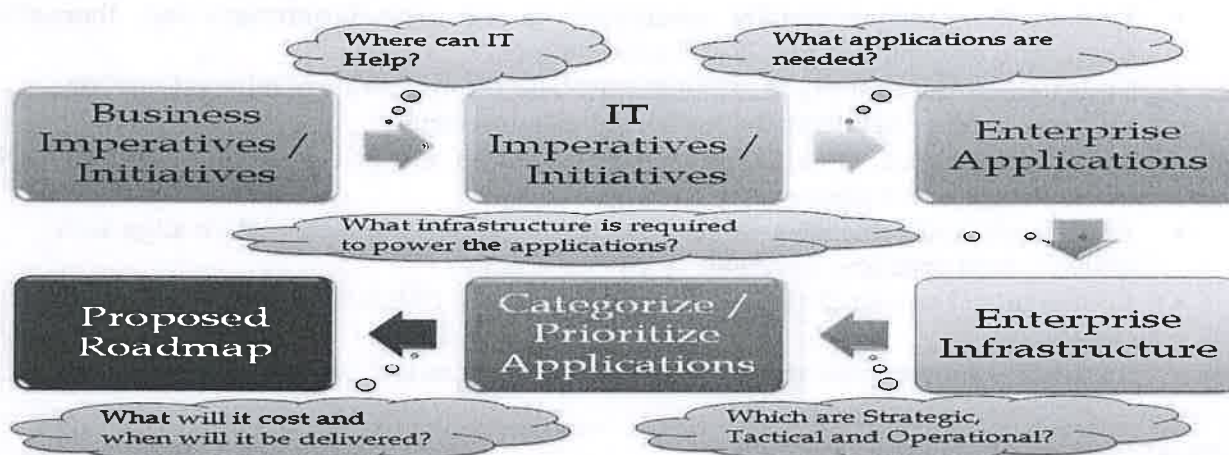
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5. To ensure complete visibility and accessibility of the information to the authorized end users ensuring its reliability and accuracy

IT Strategy | What do we want to achieve?



Expected High Level Approach



Goal to be achieved

1. To provide students, members, employees and government stakeholders with a centralized digital platform to improve and optimize the interactions with the Institute while ensuring high turnaround in service times.
2. To ensure complete visibility and accessibility of the information to the authorized end users ensuring its reliability and accuracy.
3. To actively engage in building a reliable, available and secure infrastructure platform embracing Green Computing principles across the value chain in its effort to reduce paper usage across its offices.



4. To pioneer the adoption of Green Computing and set a benchmark across its peer institutes in the world.
5. To enable its employees across HO, ROs and chapter offices to have visibility and access to the Information with best of the breed user experience across all touch points.
6. To actively pursue establishing a standard operating environment of its digital technology platform leveraging licensed software across all its offices thereby optimizing the efficiencies of scale.
7. To aggressively pursue enablement of students and members in the emerging areas of Corporate Governance thereby ensuring timely availability of professional skill sets in the marketplace leading to better distribution of the opportunity pie across the CS Parivar.

4. Scope of Work

The vendor through the bidding process shall study the processes related to the projects identified by ICSI and shall undertake the specified activities across each of the directorates of the Institute. The vendor will be responsible for turnkey activities including process study, system design, architecture, migration, and overall project management to ensure effective integration, implementation, and roll-out of these projects within ICSI. The detailed activities to be executed for each project are outlined below.

Process Study

The vendor is expected to study the existing ICSI processes and applications, identify systems that shall fulfil the Integration & automation of these processes and identify processes that may require re-engineering and undertake reengineering.

Activities

1. To undertake the process study, the vendor is expected to undertake the following activities;
 - Explain the process of fully automation to the user department and, thereafter, determine stakeholder needs and expectations.
 - Undertake process study to formulate process requirements of fully automation.
 - Map the process details to the functional requirements.
 - Study the workflow of all the processes identified and prioritization of the processes for automation and prepare the new workflow.
 - Applying CMMI principles, ensure that the study and implementation align with industry best practices for maturity and capability.
 - Document current workflows and compare against CMMI benchmarks for process capability.
 - Highlight inefficiencies and areas needing re-engineering.

Deliverables

The vendor is expected to produce the following deliverables as part of the “**Process Study**” task:

- Processes in the Institute – The report will define the existing processes in the Institute vis-à-vis the manpower which is maintaining the systems as on date.
- Gap analysis plan
- As-Is process study report - This report must bring out process details, process mapping to systems and process re-engineering needs and detailed comparison on the time, efficiency and manpower which the new proposed system is expected to attain.
- Project Approach and methodology document
- Project Implementation Schedule



- Project Acceptance Criteria
- Fortnightly Project review report
- Fortnightly Feedback of the review of the deliverables
- Weekly Project Status report

Business Process Reengineering

The Business Process Reengineering initiative shall include a study of the existing processes and a survey of best practices adopted by professional educational institutions and the education sector internationally. Based on this analysis of processes, IT requirements, and global best practices, the vendor will identify the specific BPR needs of ICSI. Agile methodology and principles should be adopted for this initiative.

Activities

Some of the activities to be undertaken as part of the BPR exercise will be as follows:

1. Set up Reengineering objectives, criteria for designing new processes and methodology of reengineering.
2. Identify process engineering requirements of each activity including sub-activities.
3. Carry out process reengineering with active involvement of the ICSI Staff.
4. Apply CMMI's Organizational Process Focus to prioritize processes for automation.
5. Design new workflows ensuring compliance with CMMI maturity goals.

Deliverables

The vendor is expected to produce the following deliverables along with all workings as part of the "Business Process Reengineering" task:

1. Report on Stakeholders feedback, expectations and requirements.
2. Report on Business Process Reengineering.
3. Process Modelling.
4. Report on Process Improvement.

Designing Solution Architecture

The vendor will need to develop high-level Technology Architecture for fully Integrated & automation system deployed in India. Such architecture shall adequately address the improved process needs of projects for ICSI. The solution architecture shall include hardware, networking, software, training, data migration and maintenance architectures.

Activities

To undertake the above scope of work, the vendor is expected to undertake the following activities:

1. Develop solution architecture for fully automation system on latest platform/technology including:
 - a. Information Architecture
 - b. Application software architecture
 - c. System Software Architecture.
 - d. Implementation plan & Strategy
 - e. Application & Data Migration plan
 - f. Strategic plan of running legacy systems in Parallel with Proposed system
 - g. Hardware architecture
 - h. Network Architecture
 - i. Security Architecture
2. Review the current IT infrastructure at ICSI.
3. Adhere to GIGW guidelines.
4. Accessibility Compliance.



5. Security Audit.
6. Analyze the hardware, networking and software needs of each project to arrive at the gap analysis.
7. Plan and prioritize procurement and oversee establishment of the IT infrastructure components.
8. Identify networking requirements including components required, bandwidth requirements and network architecture to ensure widespread availability of the resources and applications.
9. Prepare application portfolio and cost benefit analysis of the various application options.
10. Define Software requirements including functionality to be implemented and interdependencies between various modules. The study will also result in necessary inputs for creation of the software architecture to ensure that the desired functionality is implemented resulting in efficient and accurate system for ICSI.
11. The maintenance requirements of the implemented system.
12. Identify SLAs for maintenance of the system, based on the interaction with the ICSI staff.
13. Reducing the dependency of the Institute on the third-party vendors.

Deliverables

The vendor is expected to produce the following deliverables as part of the “Designing Solution Architecture” task:

1. Solution Architecture document.
2. Gap analysis report including details on the current and suggested basic IT infrastructure, communication, connectivity, and other IT requirements of ICSI.
3. Recommendations for system support and maintenance.

Training & Change Management

The vendor assesses the Change Management and Training requirements for all stakeholders to ensure that the benefits from the systems that will be put in place at ICSI are availed.

Activities

The activities to be undertaken under this Task include:

1. Identifying Training requirements both technical and Operational.
2. Identify Change management strategy, interventions and plan.
3. Reorientation of the Directorates as are existing in the Institute and identification of capability of the employees in this re-orientation.
4. Suggest draft guidelines related to change management.

Deliverables

1. A Change management plan bringing out the change management methodology and implementation.
 2. Training Needs Analysis and Training Plan
 3. Report on re-orientation of the departments and capability of the employees towards this re-orientation.
 4. Draft Change Management guidelines.
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Comprehensive Scope of Functions across all Directorates – HQ, NOIDA, CCGRTs, Regional Offices/Chapters, and Section 8 Companies.

S. No	Portal	Description	Directorate
1.	SMASH portal	<p>Automation of Complete Student registration life cycle from registration to exam result publish:</p> <p>Registration Functions</p> <ul style="list-style-type: none">• Prospective student onboarding• Instant registration• CSEET registration• Executive student registration• Professional registration• Foundation registration• CGI/ICSA UK Members registration• Stepwise student registration process• PIN code wise demographic details• District/City/Chapter mapping• Category wise fees and document mapping• Integration with CS Mitra portal• Eligibility criteria mapping• Automated Messages and Reminders system• Registration Approval• Registration Call For• Rectification of Student Data• Generation of ID Card• Registration Letter• Denovo• Switchover• e-cart• complaint management• Payment gateway integration• optional paper selection• Foundation programme online/offline mode• Optional Modules• CLDP integration with Professional Course• 30% - 70% weightage assessments• Verification of marks• certified copies• RTI management• Continuation of Registration, Amnesty Scheme, extension of registration• registration number generation process• work flow approval system• Addition / Updating of Qualification Change of Categories & Qualification• Change Requests (Name Change, Photo & Signature)• Posting of CSEET Result with result validity• Registration Letter History• All Changes history	Student Services



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	<ul style="list-style-type: none">• Various Student Statistical Reports• History of transitions need to be displayed for all services.• Issuing Professional Pass Certificates (Physical) After Verification• Integration with Digi Locker• Issuing Duplicate Pass Certificates (Foundation/ Executive/ Professional)• Issue of Travel Concession/Provisional Pass Certificate (Executive & Professional)• ICSI Study Centres• ICSI Signature Award Scheme• ICSI Academic Connect MOUs (For Northern region)• Contact Centres• Re-Registration• Transcript Requests• Education Verification for Placement (Agencies)• Issue of Certified Copy of the Syllabus• All India Company Law Quiz competition• Handling RTI Queries, SEFT (Financial Aid)• Yuvotsav (Student Events)• ICSI All India Competitions, Issue of Bonafide certificate• Change of name requests• ICSI Olympiad, Minority Scholarships applications• Verification of Education Loan for Students• Capacity Building certificate• Debating society• Teachers Conference• Best Region chapter Awards• Student Month• National Educator Conference• Study material Dispatch system• kiosk management• Oral Coaching Management System for ROs/Chapters• Smart Class Rooms• Configurable GST components <p>Exam Enrolment Functions</p> <ul style="list-style-type: none">• Pre-Enrolment (Exam) Set-up• Opening of exam form• Validation check for SIP / validity• Change request handling for exam form• Generation of roll numbers• Centre breaking and allocation• Centre address updating• Result verification process	
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	<ul style="list-style-type: none">• Timetable master creation• Exemption management• Issue of admit cards• Result posting• Stage pass marking• Exemption posting• Verification of marks (VOM)• Certified copies & RTI requests• Various reports (registration & enrolments)• MIS reports• Statutory and common reports• All changes history tracking• Data appropriation of enrolment• Dashboard for consolidated view• Eligibility criteria mapping• Document uploading facility• Dynamic Fee master creation as per accounting standards Mapping of fees to various types of training services.• Dynamic Integration of GST / Taxes with any service <p>Centralized & Regional Classes: Unified learning portal, LMS, AI scheduling, digital materials/infrastructure, hybrid class model, Live streaming, comprehensive support in the establishment of Digital Labs and fee payment by integrating Payment gateway. Attendance & Performance Tracking, Interactive Assessments & Quizzes, Live Chat & Discussion Forums, Online feedback mechanism, MIS Management.</p> <p>Faculty Panel & Feedback: Centralized portal for faculty management, categorization, mapping with events, session mapping, automated scheduling, performance analytics.</p> <p>Awards: Gurushreshtha Awards, All India Online G K Quiz, All India Constitution Day Quiz</p> <p>Payment Gateway: Integration of generic payment gateway system, multi-location payment, auto reconciliation process, Automation of payment refund process and mapping of refund guidelines, GST/Non-GST compliances, API integrations, Integration of all WhatsApp services.</p> <p>Configurable Services: All student-related services can be flexibly configured for Course/groups/subjects as paid or free, depending on institutional policies and requirements. It should be totally configurable. The control shall rest with the administrator for enabling the functionality of Privileges to pay fees with / without login. Reconciliation for individual offices of fees received from stakeholders etc. may be integrated in a single web application. Authoring and</p>	
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		<p>Maintaining templates for Email / SMS for each trigger (action against any updation).</p> <p>Role-Based System: Access and permissions are managed through a role-based architecture, ensuring that students, faculty, and administrators interact with the system according to their designated roles.</p> <p>Masters Creation: Centralized masters creation enables standardized setup of courses, subjects, fee structures, and service categories etc., ensuring consistency across all modules.</p> <p>Support & Migration of data during a parallel run: At the time of Production Deployment both applications (Existing and New) will run parallel for a certain time period for smooth Functionality Testing. After successful verification and approval, the existing application will be sunset and the data entered during the pilot run will also have to be migrated to New System.</p> <p>Provision for all entitlements / privileges for all types of Profiles like as End Users, Super Users, IT Users, IT Administrators, DB Administrator and Super Administrator with password assistance through SMS and email. Role based access and authorization of various modules</p> <p>Mobile Application & AI Capabilities</p> <ul style="list-style-type: none"> • Development of a dedicated mobile application to provide seamless access to all Institute services. • Integration of the latest AI-powered features for personalization, automation, and intelligent assistance. • Unified platform ensuring students, members, and administrators can manage services anytime, anywhere. 	
2.	STIMULATE portal	<p>Training Functions:</p> <ul style="list-style-type: none"> • Complete life cycle of Student including Training • CLDP (Corporate Leadership Development Programme: CLDP Webinar mode, CLDP Weekend Classes, CLDP Classroom non-residential, CLDP Classroom residential and ACS registration requests with fee acceptance on the final day of training, etc.) • Long term training (21 Months/12 Months and 12 Months stage wise) • Short term training (SIP, TDOP, e-EDP, 15 days EDP Classroom mode etc.) 	Directorate of Training

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	<ul style="list-style-type: none">• Faculty Management, Random selection of faculty, session mapping• Implementation of multi-location payment gateway system• Company/PCS/Trainer registration• Training switchover• TC Certificate• Automation of refund of fees• Auto reconciliation process• Reimbursement module• Registrations Monitoring system management• Work flow-based system• Multilevel approval system• Various letters generation• SIP and TDOP integration• Exemption process (Training exemption Partially/Completely with fee)• AI PDF reader and summary generation• GST/Non-GST compliances• Calendar event registration• Faculty session mapping & Faculty feedback for each type of training, best faculty selection on the basis of feedback• Dynamic creation and mapping of various trainings with student course/members.• Dynamic Fee master creation as per accounting standards Mapping of fees to various types of training services.• Dynamic Integration of GST / Taxes with any service• Virtual Reality (VR)-based boardroom simulations• Gamified compliance training• AI-driven personalized learning paths• Mentorship and peer-learning networks• Quarterly report on the Long term training module• Project report assessment module• Long term training completion module• All sponsorship letters and certificates, whether past or present, maintain their format• Learning Credit Points (LCP) module• Academic and e-learning records of students at the Training module• Training module requires all type of MIS• Training admin allows training user roles to be customized• Dashboard user wise• Regular notification on student's page to apply eligible training at announced available chapter• Submitted contract/appointment letter should be available at user's screen	
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- The student training structure shall be implemented through an online automated system. This system must ensure close integration between the student and the trainer (company/PCS), strict adherence to training guidelines and compliance standards, and provide comprehensive day-to-day monitoring. The solution shall include tracking mechanisms for attendance, stipends, and other related parameters to guarantee transparency and accountability throughout the training lifecycle.

Payment Gateway: Integration of generic payment gateway system, multi-location payment, auto reconciliation process, Automation of payment refund process and mapping of refund guidelines, GST/Non-GST compliances, API integrations, Integration of all WhatsApp services.

Configurable Services: All student-related services can be flexibly configured for Course/groups/subjects/all types of trainings as paid or free, depending on institutional policies and requirements. It should be totally configurable. The control shall rest with the administrator for enabling the functionality of Privileges to pay fees with / without login. Reconciliation for individual offices of fees received from stakeholders etc. may be integrated in a single web application. Authoring and Maintaining templates for Email / SMS for each trigger (action against any updation)

Role-Based System: Access and permissions are managed through a role-based architecture, ensuring that students, faculty, and administrators interact with the system according to their designated roles.

Masters Creation: Centralized masters creation enables standardized setup of courses, subjects, fee structures, and service categories etc., ensuring consistency across all modules.

Support & Migration of data during a parallel run: At the time of Production Deployment both applications (Existing and New) will run parallel for a certain time period for smooth Functionality Testing. After successful verification and approval, the existing application will be sunset and the data entered during the pilot run will also have to be migrated to New System.

Provision for all entitlements / privileges for all types of Profiles like as End Users, Super Users, IT Users, IT Administrators, DB Administrator and Super Administrator with password assistance through SMS and email. Role based access and authorization of various modules



		Mobile Application & AI Capabilities <ul style="list-style-type: none">• Development of a dedicated mobile application to provide seamless access to all Institute services.• Integration of the latest AI-powered features for personalization, automation, and intelligent assistance.• Unified platform ensuring students, members, and administrators can manage services anytime, anywhere.	
3.		<p>A person who has passed the Intermediate Examination/ Executive Programme examination and Final Examination / Professional Programme examination of the Institute and has undergone prescribed training or exempted therefrom on the basis of experience is eligible to apply for Associate membership of the Institute provided and he has attained the age of 21 years on the date of application as per the Matriculation / school leaving certificate.</p> <p>Membership Functions:</p> <ul style="list-style-type: none">• Membership types & Registration: ACS, FCS, COP• Licentiate• Instant membership processing• Process and Functionality of ECSIN & UDIN Generation• Member search (restricted copy access)• Credit hours updating and certificate generation process• Fees management: COP, Annual Membership, FCS, Renewal• Defaulter declaration & penalty collection (Directorate of Discipline)• COP processes: Renewal, Restoration, Cancellation• Recording death of a member• Change requests: name, DOB correction, address, marital status• Capturing physical handicapped data• Qualification updates & transcripts• Secretarial Executive Certificate issuance• Duplicate ID card & membership certificate• Restoration process for members• Calculation of fees for defaulters• Firm management: Firms, Branches, LLP, MDP• Paid assistance with user-friendly navigation & look-and-feel• Firm name/change guidelines mapping• Certificate generation categorization• Areas of practice in Form D for PCS Skill Directory	Membership



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- Event management (conventions, convocations)
- Study material/kit dispatch management
- Employee recruitment processes
- Peer review system
- Election management & voter list (to be incorporated)
- MCA integration
- GST/Non-GST compliances
- PMLA compliance
- MSME facilitation
- KYM (Know Your Member)
- MIS reports
- Corporate Membership Fee Payment System
- Budget management system
- Statutory reports
- Common reports
- CSBF process & financial assistance for members
- Data extraction in report format (instant, critical, time-based) using AI
- COSMIC integration linked with BPR for member files & data
- Integration of chapters with child portals (view-only)
- Inter-departmental integration within ICSI (view-only)
- IAFC & ICSA-CGI linkage
- User profile creation
- Role-based access rights
- Dashboard for consolidated view
- Member search with restricted to copy the content
- Members community portal

Payment Gateway: Integration of generic payment gateway system, multi-location payment, auto reconciliation process, Automation of payment refund process and mapping of refund guidelines, GST/Non-GST compliances, API integrations, Integration of all WhatsApp services,

Configurable Services: All Members-related services can be flexibly configured as paid or free, depending on institutional policies and requirements.

Configurable Services: All Members-related services can be flexibly configured as paid or free with GST/Non-GST, depending on institutional policies and requirements. It should be totally configurable. The control shall rest with the administrator for enabling the functionality of Privileges to pay fees with / without login. Reconciliation for individual offices of fees received from stakeholders etc. may be integrated in a single web application. Authoring and Maintaining templates for Email / SMS for each trigger (action against any updation).



		<p>The application should be configurable enough to visible / enable certain features / functionalities. Like as Birthday Greetings, various services pertaining to Training & Membership Modules, HQ/RO/Chapters Events etc. through control panel with start and end date with proper authorization</p> <p>Role-Based System: Access and permissions are managed through a role-based architecture, ensuring that students, faculty, and administrators interact with the system according to their designated roles.</p> <p>Masters Creation: Centralized masters creation enables standardized setup of courses, subjects, fee structures, and service categories etc., ensuring consistency across all modules.</p> <p>Mobile Application & AI Capabilities</p> <ul style="list-style-type: none"> • Development of a dedicated mobile application to provide seamless access to all Institute services. • Integration of the latest AI-powered features for personalization, automation, and intelligent assistance. • Unified platform ensuring students, members, and administrators can manage services anytime, anywhere. 	
4.	ERP (Oracle EBS R12) and its integrated Microsoft SharePoint (Cosmic) and customized Dotnet based applications (CRAS etc)	<p>Organization Structure The Institute maintains its Head Office at 22, Institutional Area, Lodi Road, New Delhi. An additional office is located at C-36, Sector 62, Noida. Collectively, these two offices in Delhi and Noida accommodate approximately 32 directorates. These directorates are entrusted with overseeing the Institute's day-to-day operations, administrative functions, and diverse business activities.</p> <p>The Institute has four (4) Regional Offices (ROs) at New Delhi, Kolkata, Mumbai & Chennai, Four (4) Centre for Corporate Governance Research & Training (CCGRT) at Mumbai, Hyderabad, Kolkata and Manesar.</p> <p>The Institute has currently Seventy-two (72) Chapter offices (COs), spread across India.</p> <p>The Institute has currently Six (6) Section 8 companies:</p> <ol style="list-style-type: none"> 3. ICSI IIP 4. ICSI RVO 5. ICSI International ADR Centre 6. ICSI ISA 7. IGPI 8. ICSI NCLT PRACTITIONERS ASSOCIATION 	F &A/HR/ Purchase/ Inventory
5.	ERP (Oracle EBS R12) and its	Currently ICSI offices are using following modules in ERP with some integrated Applications:	

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	integrated Microsoft SharePoint (Cosmic) and customized Dotnet based applications (CRAS etc)	<p>1. Oracle Apps/ E-business suite Version R-12.2.10</p> <ul style="list-style-type: none"> a. Oracle Financials (AP, AR, FA, GL) b. Oracle HRMS c. Oracle Payroll d. Oracle Purchasing e. Oracle Inventory f. Oracle Order Management g. Oracle Employees Self Service h. SSHR Notifications and Reports <p>Oracle based Custom Modules</p> <ul style="list-style-type: none"> i. Expense Management j. PF Module k. APEX Module for Chapter Offices (Accounts Payables & General Ledger) l. ITMS (Invoice Tracking management system) module <p>2. Customized Microsoft Dot Net based applications</p> <ul style="list-style-type: none"> a. Centralized Receipt Accounting System- Point of Sale (CRAS) The Central Receipt Accounting System is used by all Offices of ICSI as a Point of Sale. b. Inventory Requisition module (Custom ERP) for HQ(Reception) & CO/RO users c. ICSA – CGI Endorsement Application d. Online Donation Module at Web portal www.icsi.in e. ICSI Tender Web Application f. ICSI Pensioner's Portal <p>9. Microsoft Share-point (2019) workflow-based Document and knowledge Management System and other applications /modules</p> <p>10. Data Sync among different applications like Oracle apps, SharePoint portal and dotnet based custom applications</p> <p>11. Helpdesk manage engine to manage the tickets of internal stake holders</p> <p>COSMIC SharePoint portal: Document Management System for all Directorates</p>	
6.	AI Enabled ERP system	The Institute of Company Secretaries of India (ICSI) intends to implement latest version of an AI-enabled Enterprise Resource Planning (ERP) system to streamline and enhance its day-to-day business operations. Through this transformation, ICSI seeks to leverage advanced technologies, including artificial intelligence, to modernize its processes, improve decision-making, and deliver superior services to stakeholders. The ERP system will serve as a unified digital backbone, enabling seamless	Headquarter , CCGRTs, Regional Offices, Chapters Offices and Section 8 companies



		<p>coordination, optimized resource utilization, and future-ready scalability.</p> <p>The Institute of Company Secretaries of India (ICSI) is seeking an AI-enabled ERP system that will include, but not be limited to, the following modules:</p> <ul style="list-style-type: none"> • Finance & Accounts • HRMS & Payroll • Employee self-services • Employee Performance Management System (EPMS) • E- Procurement system, Record Management System • E-Cart System • Inventory & Stock Management System • Customer Relationship Management (CRM) • Project Management • Contract Management • Analytics & Business Intelligence <p>The ERP solution must:</p> <ul style="list-style-type: none"> - Integrate financial, compliance, payroll, and HR functions and other modules seamlessly. - Automate reconciliation and reporting across multiple payment gateways, banks, and statutory filings. - Support multi-entity accounting (HQ, CCGRTs, ROs, Chapters, Section 8 companies) and currency. - Enable advanced analytics and dashboards for budgeting, receipts, and compliance monitoring. - Provide strong audit trails and internal controls to meet statutory requirements. - Offer user-friendly workflows for claims, refunds, and employee benefits <p>*The above requirements are indicative and will be finalized with ICSI during the BPR implementation phase.</p>	
7.	ERP – Finance & Accounts	<p>The ERP – Financial solution should incorporate comprehensive modules designed to facilitate the following functionalities for Finance & Accounts (F&A) users across ICSI Chapters, Regions, CCGRTs, Headquarters, and Section 8 companies:</p> <ul style="list-style-type: none"> - Financial core: General Ledger, Budgeting & Planning, Payments & Vendor Management: Accounts Payable, Receipts & Income: Accounts Receivable, POS (Point of sale), Cash & Bank, Fixed Asset Register etc - Cash & Bank Management: Investment Module, Bank liaison & reconciliation, Monitoring receipts & fund accounting, Programme /seminar accounting for Chapters/Regions/CCGRTs/HQ and Section 8 companies 	Headquarter , CCGRTs, Regional Offices, Chapters Offices and Section 8 companies



		<p>- Compliance & taxation: Tax Management (GST, TDS, RCM), E-invoicing, Audit & Compliance, Online Form 16 Distribution</p> <p>- People & claims: HR & Payroll, Expense Management, Benefits/Claims, Tax Declaration, Claims & Reimbursements (Children Education, Medical – OPD, Medical-Hospitalization, LTC (Leave Travel Concession), Holiday Conveyance, Travel & Daily allowance, Official Duty etc), Loans and Advances application Automation with digital submission and approval workflows.</p> <p>- Operations & programs: Project/Grant accounting (for programmes/seminars), Intercompany accounting</p> <p>- Data, Reports and Dashboard: BI & Analytics (Power BI), Financial reporting (FR), Management reporter, preparation of Income & Expenditure (I&E) Statements and Balance Sheets (BS) within ERP</p> <p>- Integration layer: Payment gateways, Banks, GST portal, TDS/Income Tax utilities, external portals (if any), Document management</p> <p>- Electronic Vendor Payments with Bank Integration: The ERP Finance module must support electronic vendor payments through seamless integration with banking systems to ensure efficiency, transparency, and compliance in financial transactions</p> <p>- Vendor Portal Integration: Vendors can view payment status in real-time through ERP portal. Automated notifications to vendors upon payment release. Reduction of disputes through transparent tracking.</p> <p>- Self-Service Portals (ESS/MSS) – Employee and manager access for requests, claims, and approvals. Employee dashboard and self-service Reports to see their claim status, and respective entitlement balances.</p> <p>- Real-time dashboards and intelligent alert mechanisms to ensure transparency, compliance, and proactive financial management across Headquarters, Chapters, Regions, CCGRTs, and Section 8 companies.</p> <p>1. Dashboards: The ERP must provide configurable dashboards with:</p> <ul style="list-style-type: none"> • Financial Overview: Real-time visibility of cash flow, revenue, expenditure, and budget utilization. 	
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		<ul style="list-style-type: none">• Accounts Payable (AP): Vendor payment status, pending invoices, due dates, and discount opportunities.• Accounts Receivable (AR): Outstanding receivables, overdue accounts, collection efficiency, and debtor aging.• Fixed Assets: Asset valuation, depreciation schedules, and utilization metrics.• Tax Compliance: GST/TDS reconciliation status, filing deadlines, and compliance alerts.• Reconciliation Status: Bank reconciliation, payment gateway reconciliation, and intercompany reconciliation dashboards.• Audit & Compliance: Exception reports, audit trails, and compliance readiness indicators.• Drill-Down Capability: Ability to move from consolidated dashboards to transaction-level details.• Annual Strategic Planning Report <p>2. Alerts & Notifications: The ERP must provide automated alerts and notifications for:</p> <ul style="list-style-type: none">• Payment Alerts: Upcoming vendor payment due dates, failed transactions, or duplicate invoice detection.• Receivable Alerts: Overdue customer invoices, partial payments, or unapplied credits.• Tax Alerts: GST/TDS filing deadlines, mismatches in GSTR-2B/3B, incorrect deductions, or non-compliance.• Budget Alerts: Overspending against approved budgets or nearing utilization thresholds.• Reconciliation Alerts: Unmatched transactions in bank statements, payment gateways, or intercompany accounts.• Audit Alerts: Missing documentation, unauthorized entries, or policy violations.• Custom Alerts: User-defined thresholds for financial KPIs (e.g., cash balance below ₹X, receivables aging beyond 90 days).• Investment Alerts: Alerts for maturity, renewal, and reinvestment, Reporting on investment performance and balances• Delivery Mode: Alerts must be available on dashboards, via email, and optionally through mobile notifications. <p>3. Configurability & Intelligence</p> <ul style="list-style-type: none">• The ERP must allow configurable alert thresholds and escalation rules.	
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		<ul style="list-style-type: none"> The ERP must use AI to detect anomalies and generate predictive alerts (e.g., risk of cash shortfall, vendor default probability). <p>The ERP must support role-based dashboards and alerts tailored to Finance, Audit, Procurement, and Management users.</p>	
8.	ERP – Finance & Accounts	<p>The proposed ERP solution must incorporate AI-enabled financial management capabilities to automate, optimize, and enhance accuracy across all finance-related processes at all the offices at ICSI. The solution must provide comprehensive functionality that covers the entire finance and accounts lifecycle, including, but not limited to:</p> <ol style="list-style-type: none"> 1. Automated Financial Processing <ul style="list-style-type: none"> Invoice Automation (AP/AR): AI-driven extraction, validation, and coding of invoices using OCR and machine learning. Automated Matching: Intelligent 2-way/3-way matching of invoices, purchase orders, and receipts. Duplicate & Fraud Detection: AI-based anomaly detection to prevent duplicate payments or fraudulent transactions. 2. Financial Statement Automation <ul style="list-style-type: none"> Automated preparation of Income & Expenditure Statements and Balance Sheets. Consolidation across multiple entities (HQ, Chapters, Regions, Section 8 companies). Configurable templates aligned with statutory and organizational reporting formats. 3. AI-Enabled Reconciliation: The ERP must provide automated reconciliation across the following areas: <ul style="list-style-type: none"> Bank Reconciliation: Real-time matching of ERP ledger entries with bank statements; exception handling for timing differences. Payment Gateway Reconciliation: Automated comparison of payment gateway receipts vs ERP entries vs bank credits; exception queue management. Vendor/AP Reconciliation: Matching vendor invoices with POs and GRNs; detection of duplicates, incorrect tax codes, or mismatched amounts. AR/Debtor Reconciliation: Matching customer receipts against invoices; identification of partial payments, overpayments, or unapplied credits. 	Headquarter , CCGRTs, Regional Offices, Chapters Offices and Section 8 companies



		<ul style="list-style-type: none">• Tax Reconciliation: Automated reconciliation of GST filings (GSTR-2B, GSTR-3B) and TDS deductions with ERP records and 26AS statements.• Intercompany Reconciliation: Elimination of due-to/due-from balances across HQ, Chapters, Regions, and Section 8 companies.• Employee Claims & Payroll Reconciliation: Validation of payroll disbursements and employee claims against policy rules. <p>4. Predictive Analytics & Forecasting</p> <ul style="list-style-type: none">• AI-enabled forecasting for cash flow, revenue, and expense trends.• Scenario analysis for budgeting and financial planning.• Predictive models for investment of surplus funds and treasury management.• Annual Strategic Planning Report <p>5. Compliance & Audit Support</p> <ul style="list-style-type: none">• Automated compliance checks for GST, TDS, Income Tax, and other statutory requirements.• AI-driven reconciliation of 26AS, GSTR-2B, and payment gateway data.• Audit trail generation with exception reporting for internal and statutory audits. <p>6. Vendor Tax Compliance Verification: The ERP must provide automated verification of vendor tax compliance, including:</p> <ul style="list-style-type: none">• GST Compliance:<ul style="list-style-type: none">○ Verification of vendor GST registration numbers (GSTIN) against government databases.○ Automated reconciliation of vendor invoices with GSTR-2B and GSTR-3B filings.○ Detection of default parties where GST collected but not deposited.• TDS Compliance:<ul style="list-style-type: none">○ Automated deduction and validation of TDS at applicable rates.○ Verification of challan deposits and reconciliation with Form 26AS.○ Alerts for non-compliance or incorrect deductions.• Other Statutory Compliance:<ul style="list-style-type: none">○ Validation of PAN, TAN, and other statutory identifiers.	
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		<ul style="list-style-type: none"> ○ Automated compliance checks for vendor eligibility under statutory schemes. ● Exception Handling: <ul style="list-style-type: none"> ○ AI-driven anomaly detection for mismatched tax codes, incorrect rates, or duplicate entries. ○ Exception queues for Finance teams to resolve discrepancies. <p>7. Vendor & Payment Optimization</p> <ul style="list-style-type: none"> ● AI-enabled vendor performance monitoring and risk scoring. ● Smart payment scheduling to optimize working capital and leverage early payment discounts. ● Automated reminders and alerts for pending vendor bills and approvals. <p>8. Expense & Claims Automation</p> <ul style="list-style-type: none"> ● AI-based validation of employee claims (TA/DA, medical, education reimbursements etc). ● Automated routing of claims to HR/Finance workflows. ● Exception handling and fraud detection in claims processing. <p>9. Real-Time Dashboards & MIS</p> <ul style="list-style-type: none"> ● AI-powered dashboards for AP aging, AR collections, cash position, and budget utilization. ● Drill-down capability from consolidated reports to transaction-level details. ● Automated MIS distribution to management and directorates. ● Auto tracking of assets (CCTV, IT equipment, furniture, consumables). <p>10. Configurability & Scalability</p> <ul style="list-style-type: none"> ● System must be configurable to accommodate future statutory changes and organizational policies. ● Scalable to handle high transaction volumes across multiple entities without performance degradation. 	
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9.	ERP – Finance & Accounts	<p>Summary of Activities – Directorate of Finance & Accounts (HQ)</p> <p><u>F&A activities are mentioned briefly here for Reference During the Business Process Reengineering (BPR) Exercise and for Guiding Bidders in Proposing the Best ERP Solution to ICSI</u></p> <ol style="list-style-type: none">1. Preparation of Annual Budget of HQ (Revenue & Capital), collection of data from all the Directorates and Consolidated budget of ROs and Chapters.2. Provisioning of expenses related to previous year before the close of annual accounts and preparation of draft accounts for the respective financial year3. Statutory audit of the annual accounts of HQ + CCGRT and Consolidated Accounts4. Conduct of Finance Committee meetings for approval of annual budget / annual accounts and various other matters5. Filing of GST Return, TDS Return, Income Tax Return.6. Accounting and bookkeeping of Section 8 companies including monthly reconciliation and MIS for GST, TDS, and Budget.7. Review of GSTR2B for all the pending invoices and make recovery of parties who failed to deposit GST but collected from ICSI.8. Investment of Surplus funds of the Section 8 company after due diligence of the current interest rate.9. Processing and releasing of payment – Verifying the bills per the DOFP of the Section 8 companies and proceeding for payment.10. Reconciliation of balances with sister concern of ICSI. Review of ledger to find the GAP between the organization.11. Internal and Statutory Audit of Section 8 company.12. Payroll processing, Costing of salary, Deduction of salary. Payment of statutory and other dues13. Processing of medical / children education / professional membership fee / leave encashment / composite transfer grant14. Filing of claims for GSLI, gratuity, leave encashment15. Processing of accidental claims to LIC16. Processing and releasing of final settlement dues to employees upon superannuation and resignation.17. Processing of TDS Returns of ICSI employees on rolls.18. Processing of provident fund statements of ICSI employees19. Processing of local conveyance and Holiday claims of Employees through ERP20. Processing and payment of TA/DA claims of Council Members as well as employees21. Processing of third-party Bills.22. Depositing of TDS challan of third party and MCA.23. Submission of monthly RCM Challan	Directorate of Finance & Accounts
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10.	ERP – Finance & Accounts (Continued)	<p>24. Assistance in Filing of TDS Return</p> <p>25. Payment Voucher Processing with RTGS/NEFT to Bank for remittance to Vendors.</p> <p>26. Form Creation of Vendor's Ledger into Oracle on the basis of request from various directorate</p> <p>27. Monthly Processing and releasing of MCA Executive (CRC/C-Pace/IEPFA/CSC/CPC) Salary – Company Secretaries located at Manesar/Delhi.</p> <p>28. Monthly Invoicing to MCA with respect to MCA Executive</p> <p>29. Recording and Updation of MCA Debtor payment via sanction received from respective directorate</p> <p>30. Issue of Pay-Slip to MCA Executive</p> <p>31. Filing and Assessment of Income Tax work</p> <p>32. Finalization of Budget in respect of Payment Gateways, Bank, Interest, 26AS, TDS, etc.</p> <p>33. Overall Management of Bank Accounts of ICSI HQ with Reconciliation of Bank Accounts in HQ.</p> <p>34. Treasury Function: Investment of Surplus Fund of Institute and giving assistance to RC/Chapter for Investment</p> <p>35. Reconciliation of 26AS for Institute with various Chapters and RCs</p> <p>36. Reconciliation of PG Income with Bank and IT Payment Gateways and chase for rectification with various directorate</p> <p>37. Resolve the various issues from the concerned officials of Dte. of F&A , IT , Membership & Student Services</p> <p>38. Arranging the data from all Payment Gateways reconciliation with entries posted in books of accounts</p> <p>39. CRAS/SMASH/Stimulate related activities for ICSI all Chapter/RC and CCGRT for receipt at ICSI HQ</p> <p>40. Receipt Monitoring and processing of transactions related 10 Payment gateways at ICSI HQ</p> <p>41. Monitoring & processing of all Functions related to Receipt & Accounting of Funds received by way of Cash/Cheque / DD/NEFT/RTGS and deposited with the Banks & Liaisoning with the Banks</p> <p>42. Scrutiny of all the Ledger Accounts related to ICSI HQ Income</p> <p>43. Reconciliation of Income Related to Programme Fee, Members Fees and Students Fees vs Dte of F&A Ledgers</p> <p>44. Reconciliation of Income received from Shaheed ki beti fund and Amazon</p> <p>45. Forex Payments for ICSI</p> <p>46. Advance payment processing for examination centre and settlement of advances and releasing balance payment to the respective examination centre (approx. 230 centre- 2 time in a year) and processing of honorarium for general observer claims of member/staff/retired employees etc. (approx. 1100 nos.)</p>
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11.	ERP – Finance & Accounts (Continued)	<p>47. Processing of refunds of fee of various nature i.e registration, examination, courses fee etc. To stakeholder like students/members/parties etc. Through online/offline mode</p> <p>48. Preparation of details of receiving and payment of earnest money deposited, retention money and security deposit and processing of refund of earnest money deposit / security deposit / retention money to 3rd parties through offline /online mode</p> <p>49. Processing of payment for honorarium to study writer / reviewer /faculties /article authors etc</p> <p>50. Processing of contractual salary on monthly basis and release their payment into respective accounts. Issuing payment certificate to the candidates</p> <p>51. Tax Invoice & Bill of supply issued in CRAS (CH/DD & IPO, Bank Transfer). CRAS name wise head wise report generates for accounting entry in ERP</p> <p>52. CRAS & STIMULATE - Invoice report generate and E-Invoice generate in GST Portal.</p> <p>53. Bill desk and Canara Bank Challan Transaction File upload in SMASH Portal. Income booked in ERP & reconciled received through Canara Bank Challan</p> <p>54. Income book in ERP received form RC/Chapter for HQ collection. All region & Chapter CRAS name wise head wise report & bank deposit slip printout take received through email</p> <p>55. Resolution of queries received from students/Members/Other in smash portal.</p> <p>56. Programme Fees Reconciliation.</p> <p>57. Inter unit / branch reconciliation with jurisdictional Chapters/ Units</p> <p>58. Processing and payment related to chapter quarterly claim CAPs, Career fair, Teacher conferences, Property tax & various programmes etc.</p> <p>59. Payment of Development grant to the chapters/Regions</p> <p>60. Advance processing to chapters for conducting seminars, conferences, purchase of IT/NON-IT assets</p> <p>61. Accounting for programmes / seminars of the Chapters/ Regions/ CCGRTs</p> <p>62. To provide the MIS reports or the reports required to be sent to various Directorates of the Headquarters related to Chapters/Regions/CCGRTs</p> <p>63. Digital Signature</p> <p>64. Payment reversal process</p>
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12.	<p>ERP related activities</p> <ul style="list-style-type: none"> • Finance and Accounts • Purchasing • Inventory Stock Management Accounts payable 	<p>ERP related Activities at CCGRTs. – <u>are mentioned briefly here for Reference During the Business Process Reengineering (BPR) Exercise and for Guiding Bidders in Proposing the Best ERP Solution to ICSI</u></p> <p>Financial Accounting – COA automation, JV workflow, auto-posting from modules, real-time financials. Accounts Payable – 3-way invoice match, digital approvals, tax automation, e-payments, AP aging. Accounts Receivable – Online receipts, bank reconciliation, digital invoicing, AR aging & reminders. Budgeting & Fund Management – Online budgeting, budget vs. actuals, commitment control, multi-fund tracking. Asset Accounting – Auto asset creation, depreciation, RFID/barcoding, transfers & disposal, physical audit. Cash & Bank Management – Digital cash/bank book, auto bank reconciliation, petty cash workflow, treasury tracking. Compliance & Reporting – Automated GST/VAT/TDS, audit trail, financial MIS dashboards Requisition & Approvals – Online PR, workflow approvals, DoA, budget check. Vendor Management – Digital onboarding, vendor rating, vendor master, e-tender/e-RFQ. Purchase Orders – Auto PO creation, workflow approvals, amendments/version control, online PO release. Contracts & Rate Agreements – Contract/AMC management, rate contract alerts, auto vendor selection. Receiving & Verification – GRN automation, QC workflow, integration with Inventory & AP. Invoice Processing – 3-way match (PO–GRN–Invoice), discrepancy handling, AP posting. Procurement Reporting – Cycle time tracker, pending PR/PO/GRN, spend analytics, vendor performance.</p> <p>Item Master & Warehousing – Standard item master, warehouse hierarchy, barcode/QR tagging. Stock Receipt & Issue – Auto stock-in, MIR workflow, real-time stock updates, stock returns. Transfers & Tracking – Inter-store transfers, issue tracking, lot/batch/serial tracking. Reorder & Replenishment – Reorder alerts, auto PR, expiry tracking. Physical Inventory – Cycle counts, barcode verification, discrepancy workflows, audit trails. Valuation & Reporting – FIFO/Weighted Avg/Standard cost, inventory ledger, closing stock, consumption reports.</p> <p>Accounts Payable (AP) Automated vendor invoice capture with 3-way matching (PO–GRN–Invoice). Digital workflow for invoice verification and approval. Automatic tax calculation (GST/TDS or equivalent).</p>	ICSI CCGRT HYDERAD
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<ul style="list-style-type: none"> • Accounts Receivable, POS (point of Sale) • General Ledger • Fixed Assets • Reconciliation : BRS / CMS • Investment Module • TDS / GST / E-Invoice compliance • Grants, Reimbursement 	<p>Electronic vendor payments with bank integration. Real-time AP aging analysis and vendor reconciliation</p> <p>Online receipt generation for student fees, grants, consultancy income, rentals, etc. Automated bank reconciliation with bank feed/statement upload. Digital invoicing for external services (research consultancy, projects, training). AR aging, reminders, and collection tracking dashboards</p> <p>Automated GL Master financial book where all transactions from every module get posted and consolidated. Automated asset registration during purchase/acquisition. Depreciation calculation and GL posting. Asset tagging (Barcode/Rfid) and tracking. Asset transfer, reassignment, disposal/write-off workflows. Physical verification module with audit trails.</p> <p>Automated bank reconciliation required. Recording and monitoring all investments. Tracking maturity dates, interest rates, renewals, and withdrawals. Automatic interest calculation and posting to accounts. Alerts for maturity, renewal, and reinvestment. Reporting on investment performance and balances</p> <p>TDS (Tax Deducted at Source): System automatically calculates TDS on applicable payments, generates TDS entries, challans, and return files.</p> <p>GST (Goods & Services Tax): Automatic GST calculation on purchases and sales, GST summary reports, input/output reconciliation, and return preparation.</p> <p>E-Invoice Compliance: Supports generation of e-invoices, IRN (Invoice Reference Number) creation, QR code printing, and integration with the government e-invoice portal Grant may give by HQ as per the Guidelines it is to be automated based on the student's remigration and Reimbursement also to be online, documents may be updated at CCGRT/RO/Chapter level.</p> <ul style="list-style-type: none"> - Automatically updated from the General Ledger, reflecting all transactions accurately. - Provides key financial statements and reports to track performance, compliance, and decision-making 	
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	<ul style="list-style-type: none">• Report requirements, Balance Sheet <p>Budget Register</p>	Automated Budget Register is a master record to monitor, control, and report all budgeted funds and their usage.	
13.	E- Procurement system, Record Management System, meta data	<p>The Institute proposes the implementation of a comprehensive digital procurement and records management ecosystem. The solution must provide comprehensive functionality that covers the entire procurement lifecycle, including, but not limited to:</p> <p>1. Core Systems</p> <ul style="list-style-type: none">• E-Procurement System: End-to-end digital procurement platform for requisition, tendering, bidding, and purchase order generation.• Record Management System (RMS): Centralized repository for procurement records, contracts, and approvals.• Metadata & Searchable Repository: Digitization of legacy documents with metadata tagging and OCR-enabled searchable images. <p>2. Transactional Management</p> <ul style="list-style-type: none">• Purchase Order (PO) Management: Automated creation, approval, and tracking of purchase orders.• Invoice Management System: Digital invoice submission, validation, and payment processing.• Vendor Management: Vendor onboarding, performance monitoring, compliance verification, and communication.• Workflow Management: Configurable workflows for approvals, escalations, and notifications. <p>3. Administrative & Policy Alignment</p> <ul style="list-style-type: none">• Administrative Approval: Routing approvals to CCGRT/RO/Chapters as per Institute Purchase policy.• Mapping with Purchase Policy: Ensuring procurement activities align with institutional purchase policies.• Mapping with DOFP (Delegation of Financial Powers): Automated checks against delegated authority limits.• Mapping with GFR where ever applicable. <p>4. Integration with Third-Party Procurement Portals (e.g., GeM, DGS&D) for seamless external procurement.</p>	Purchase & Stores



		<p>5. Governance & Compliance</p> <ul style="list-style-type: none"> • Audit Trail: Comprehensive traceability of all procurement and approval actions. • Rules & Regulations: Embedded compliance with institutional and statutory frameworks. • Tax Compliance: Automated handling of GST and TDS requirements. • ESG (Environmental, Social, Governance): Procurement aligned with sustainability and ethical standards. • GFR (General Financial Rules): Adherence to government financial regulations. • DGS&D Guidelines: Compliance with central procurement norms 	
14.	e-Procurement System	<p>The Institute proposes the implementation of a comprehensive e-Procurement System to digitize and streamline procurement processes. This initiative is designed to enhance transparency, efficiency, and compliance while reducing manual intervention and ensuring seamless vendor interactions. The solution must provide comprehensive functionality covering the entire procurement lifecycle, including but not limited to:</p> <ul style="list-style-type: none"> • Online Bid Management <ul style="list-style-type: none"> ○ Invitation of bids through a secure portal ○ Electronic submission of bids by vendors ○ Online tender fee, EMD payment • Bid Evaluation & Approvals <ul style="list-style-type: none"> ○ Automated technical bid evaluation ○ Online financial bid evaluation ○ Integrated approval workflows with audit trails • Vendor Empanelment <ul style="list-style-type: none"> ○ Registration and onboarding of vendors ○ Evaluation of vendor credentials, compliance, and performance ○ Centralized vendor database for monitoring and reporting • Contract & Vendor Management <ul style="list-style-type: none"> ○ Issuance of Purchase Orders (POs) and Work Orders (WOs) ○ Performance Guarantee/ Security Submission by Vendor ○ Administration of contract terms and conditions ○ Vendor performance tracking and compliance management ○ Maintenance of all related records • Financial Integration 	Purchase & Stores



THE INSTITUTE OF Company Secretaries of India

IN PURSUIT OF PROFESSIONAL EXCELLENCE
Statutory body under an Act of Parliament

		<ul style="list-style-type: none">○ Digital processing of vendor bills○ Automated synchronization with government procurement systems○ MIS dashboards for planning, expense estimation, and internal audit• Requisition Management – Initiation and tracking of purchase requisitions from users/directorates.• Quotation Management – Inviting quotations, capturing vendor responses, and facilitating comparative evaluation.• Approval Workflow – Configurable approval processes aligned with Delegation of Financial Powers (DOFP).• Purchase Order / Work Order Management – Issuance of PO/WO / Print Order with embedded terms and conditions of contracts.• Contract Administration – Recording, monitoring, and enforcing contractual obligations.• Vendor Bill Processing – Submission, validation, and processing of vendor invoices with audit trails.• Record Maintenance – Secure storage and retrieval of all procurement-related records. <p>Study Material Vendor Management: Issuance of Print Order with embedded terms and conditions of contracts, Periodic issuance of material, availability of stock, vendor invoice. MIS - of print order issue and availability of Stock of the study Material and Publications and Delivery of Study Material by the vendor to the students as per the batches issued by the ICSI. MIS to be sent on Daily, Weekly, Monthly, Quarterly, Annually, asset management, Batch processing, material shipment process etc.</p> <p>Management Information & Controls</p> <ul style="list-style-type: none">• MIS Reporting – Generation of reports for management to support precise planning, expense estimation, and decision-making.• Internal Audit & Controls – Tools to facilitate internal audit requirements and strengthen internal control mechanisms.• Procurement Calendar – Automated scheduling and tracking of procurement activities.• Contract Management – Centralized repository and monitoring of contracts with alerts for renewals and compliance.• E-cart integration <p>Administrative & Policy Alignment</p>	
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		<ul style="list-style-type: none"> • Administrative Approval: Routing approvals to CCGRT/RO/Chapters – as per Institute Purchase policy • Mapping with Purchase Policy: Ensuring procurement activities align with institutional purchase policies. • Mapping with DOFP (Delegation of Financial Powers): Automated checks against delegated authority limits. <p>Integrations & Specialized Features</p> <ul style="list-style-type: none"> • Government Procurement System Synchronization – Automated integration with government procurement platforms (e.g., GeM/e-cart). • Study Material Management – Procurement and distribution tracking for study materials. • Stock & Inventory Management – Monitoring and control of stock levels, including green note management. • Bill Processing & Vendor Management – End-to-end handling of vendor onboarding, performance monitoring, and payment processing. • Green note management through System 	
15.	E-Cart System	<p>The Institute proposes the implementation of a comprehensive E-Cart System for its stakeholders (Students, Members, and others) to streamline and integrate all aspects of online commerce operations. The scope of this system will cover the following functional areas:</p> <p>1. Order Management</p> <ul style="list-style-type: none"> • Facilitate seamless order placement, tracking, cancellation, and returns. • Provide automated notifications to customers regarding order status. • Maintain centralized records of all orders for reporting and audit purposes. • Seamless payment/refund <p>2. Dispatch Management</p> <ul style="list-style-type: none"> • Integrate with warehouse operations for packing, labeling, and invoicing. • Assign dispatches to logistics partners with real-time visibility. 	Directorate of Purchase & Store



		<ul style="list-style-type: none"> • Provide a dispatch dashboard for monitoring and controlling outgoing shipments. <p>3. Delivery Management</p> <ul style="list-style-type: none"> • Optimize delivery routes and schedules for efficiency. • Enable GPS-based tracking for customers and administrators. • Capture proof of delivery through digital signatures or OTP validation. • Collect customer feedback post-delivery to improve service quality. • Batch processing, material shipment process <p>4. Financial Reconciliation</p> <ul style="list-style-type: none"> • Automate reconciliation of payments received across multiple gateways. • Track and manage tax collected (GST/VAT) and ensure timely deposit to government accounts. • Generate reconciliation reports for money received, tax deposited, and outstanding balances. • Integrate with accounting/ERP modules for compliance and audit readiness. <p>5. Stock Management</p> <ul style="list-style-type: none"> • Maintain real-time inventory across warehouses (HQ, CCGRTs, ROs, COs) and retail points . • Provide alerts for low stock and replenishment needs. • Support batch and expiry tracking for perishable goods. • Conduct periodic reconciliation between physical and system stock. <p>6. Student, Member Data Integration</p> <ul style="list-style-type: none"> • Maintain a secure database of student members with unique IDs. • Enable special offers, discounts, and loyalty programs for student & members. • Integrate with institutional databases for verification of student status. • Ensure compliance with data privacy and security regulations. 	
16.	ERP – Inventory &	The Institute proposes the implementation of a comprehensive AI-enabled Inventory & Stock management	Directorate of Purchase & Store



Stock Management System	<p>Module integrated with the ERP system. Automation requirements are briefly mentioned below:</p> <p><u>Study Material Vendor Management</u></p> <ul style="list-style-type: none">• Issuance of Print Order with embedded terms and conditions of contracts, Periodic issuance of material, availability of stock, vendor invoice.• MIS - of print order issue and availability of Stock of the study Material and Publications and Delivery of Study Material by the vendor to the students as per the batches issued by the ICSI.• MIS to be sent on Daily, Weekly, Monthly, Quarterly, Annually, asset management, Batch processing, material shipment process etc. <p><u>Stock Management System</u></p> <ul style="list-style-type: none">• Item master creation, category and Price configuration etc• Transfer / issue of items and publications between HQ and departments & offices.• Stock of study material at RCs, Chapters, and CCGRTs, including receipt, issue, and reconciliation with HQ.• Stock of branding items and publications at RCs, Chapters, and CCGRTs, including receipt, issue, and reconciliation with HQ.• Stock of blank answer books, Stock of other items, including receipt, issue, balance, and reconciliation.• Reconciliation process.• Integration with third-party e-commerce websites.• E-cart system.• MIS reports. <p><u>Automation of Stationery Cell</u></p> <ul style="list-style-type: none">• Paperless system for Stationery Cell operations <p><u>Automation of Store Department</u></p> <p>1. Automation of Day-to-Day Functioning</p> <ul style="list-style-type: none">• Streamline routine store operations through digital workflows.• Reduce manual intervention by implementing automated processes.• Ensure real-time updates of stock levels, receipts, and issues. <p>2. Synchronization with Store/Stock Management System</p> <ul style="list-style-type: none">• Integrate all store activities with a centralized Store Management System.	
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- Enable real-time synchronization of stock data across RCs, Chapters, and HQ.
- Provide dashboards for monitoring inventory, receipts, and issues.

3. Record Management System

- Maintain digital records of all transactions.
- Store metadata for previous records to ensure traceability.
- Enable searchable images of documents for quick retrieval.
- Ensure compliance with audit and regulatory requirements.

4. Automation of Dispatch Process

- Automate preparation of dispatch notes and invoices.
- Track shipments from initiation to delivery.
- Integrate with logistics partners for real-time tracking.
- Generate alerts for delays or discrepancies.

5. Order Tracking

- Provide end-to-end visibility of orders from receipt to delivery.
- Enable stakeholders to monitor order status in real time.
- Maintain historical data for performance analysis.

6. Batch Creation Process

- Automate batch creation for study material, branding items, and publications.
- Assign batch numbers for traceability.
- Link batches to dispatch and reconciliation records.

7. Reconciliation Process

- Automate reconciliation of receipts, issues, and balances with HQ records.
- Generate exception reports for discrepancies.
- Provide monthly and quarterly reconciliation summaries.
- Ensure transparency and accountability across all units.

Automated system for Weed out/Disposal/ Sale/ Sale of scrap /Buy-Back



		<p>An automated system required to manage the complete lifecycle of assets, including weed out, disposal, sale, scrap handling, and buy back processes as per ICSI policy</p> <p><u>AI Integration with the activities related to Directorate of Purchase and Stores</u></p> <ul style="list-style-type: none"> AI Integration with the Routine activities of Purchase and Stores Directorate vis-A-vis response to the stakeholders to leverage Artificial Intelligence (AI) for automating and optimizing the routine activities of the Directorate of Purchase and 	
17.	ERP – Inventory & Stock Management System	<p><u>Inventory & Stock Management:</u> The solution must provide comprehensive functionality that covers the entire Stock management lifecycle, including, but not limited to:</p> <ul style="list-style-type: none"> Item Master: Central database of all items/products. Multi-location stock tracking: Manage inventory at RCs, Chapters, and CCGRTs with visibility at HQ. Item categorization: Study materials, branding items, publications, blank answer books, and miscellaneous items. Receipt & issue management: Record incoming stock (from HQ or suppliers) and outgoing stock (to centers / offices or students). Stock reconciliation: Automated reconciliation between HQ and other offices (Local offices, RO, CO, CCGRT) to ensure accuracy. Batch & serial tracking: For publications or answer books, track batches for accountability. Reconciliation: Automated reconciliation of stock balances between HQ and distributed centers / offices. <p>Other Items (stationery, IT equipment, consumables).</p> <ul style="list-style-type: none"> Generic Stock Module <ul style="list-style-type: none"> Track any other item (stationery, IT equipment, consumables). Receipt, Issue & Balance <ul style="list-style-type: none"> Standardized workflow for recording transactions. Reconciliation <ul style="list-style-type: none"> Automated matching of balances with HQ records. <p>Examination Materials</p> <ul style="list-style-type: none"> Blank Answer Books 	Directorate of Purchase & Store



		<ul style="list-style-type: none"> ○ Maintain stock levels of blank answer books at HQ and RCs. • Issue & Balance Tracking <ul style="list-style-type: none"> ○ Record issuance to exam centers and monitor remaining balances. • Audit Trail <ul style="list-style-type: none"> ○ Full traceability of usage and reconciliation with HQ. <p>Branding Items & Publications</p> <ul style="list-style-type: none"> • Stock Records by Location / Offices <ul style="list-style-type: none"> ○ Track branding items (banners, brochures, merchandise) and publications across RCs, Chapters, and CCGRTs. • Receipt & Issue Workflow <ul style="list-style-type: none"> ○ Manage distribution from HQ to centers with acknowledgment receipts. • Reconciliation Process <ul style="list-style-type: none"> ○ Ensure HQ stock records match distributed stock through automated reconciliation reports. <p>Reconciliation & Audit</p> <ul style="list-style-type: none"> • HQ reconciliation process: Compare issued vs. received vs. balance stock across centers. • Audit trails: Maintain logs of all transactions for compliance and transparency. • Alerts & notifications: Flag discrepancies in reconciliation for quick resolution. <p>E-Commerce & E-Cart Integration</p> <ul style="list-style-type: none"> • Third-party e-commerce integration: Connect ERP with platforms like Amazon, Flipkart, or institutional portals. • E-cart system: Allow students or members to order study materials, branding items, or publications online. • Payment gateway integration: Secure online payments for purchases. • Order fulfillment tracking: Sync orders with stock availability and dispatch processes. • AI-Enabled Forecasting: Predict demand for study materials, branding items, and exam supplies. <p>MIS (Management Information System) Reports and Analytics - Daily, Weekly, Monthly, Quarterly, Annually</p>	
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		<ul style="list-style-type: none"> • Stock reports: Item-wise, location-wise, and category-wise stock balances. • Transaction reports: Receipts, issues, and returns. • Reconciliation reports: HQ vs. RCs/Chapters/CCGRTs. • Sales & distribution reports: For e-commerce and e-cart transactions. • Forecasting & demand planning: Predict future requirements based on usage trends. • Comprehensive dashboards for: <ul style="list-style-type: none"> ○ Stock balances (HQ vs RCs/Chapters) ○ Receipt & issue summaries ○ Reconciliation status ○ Item-wise consumption trends <p>Additional Features</p> <ul style="list-style-type: none"> • Role-based access: Different permissions for HQ, RCs, Chapters, and CCGRTs. • Barcode/Rfid support: For faster stock handling and tracking. • Integration with accounting: Link stock movements with financial records. • Document management: Attach receipts, invoices, and reconciliation statements. • Mobile app support: Enable on-the-go stock updates and approvals. <p>Compliance & Audit Reports</p> <ul style="list-style-type: none"> • Automated generation of reconciliation and audit-ready records. 	
18.	ERP – HRMS Module	<p>The Institute proposes the implementation of a comprehensive Human Resource Management System (HRMS) to digitize and streamline all HR-related processes (Complete employee Hire to Retire cycle) across all the offices (Headquarters, Chapters, Regions, CCGRTs, and Section 8 companies).</p> <p>The objective of this initiative is to establish a unified, automated, and transparent platform that enhances efficiency, ensures compliance, and improves employee experience.</p> <p>The proposed Human Resource Management System (HRMS) shall enable the digitization of HR processes (Complete employee Hire to Retire cycle), ensuring a seamless transition from manual and fragmented systems to a centralized digital platform. The solution must cover the</p>	Directorate of HR



		<p>complete hire-to-retain process cycle, providing end-to-end automation and integration across all HR functions.</p> <p>Key Objectives</p> <ol style="list-style-type: none"> 1. Digitization of HR Processes – Transition from manual and fragmented systems to a centralized digital platform. Require complete hire to retire process cycle. 2. Process Streamlining – Standardize workflows for recruitment, payroll, attendance, performance management, and employee services. 3. Compliance & Governance – Ensure statutory compliance (PF, TDS, gratuity, labor laws) with automated reporting and audit trails. 4. Employee Empowerment – Provide Employee Self-Service (ESS) and Manager Self-Service (MSS) portals for claims, leave, and approvals, HOD Self-Service (HSS) portals for claims, leave, approvals and overall monitoring. 5. Data-Driven Insights – Enable management with dashboards, analytics, and MIS reports for workforce planning and decision-making. <p>Scope of HRMS Modules</p> <ol style="list-style-type: none"> 1. Recruitment & Onboarding <ul style="list-style-type: none"> o Digital requisition and applicant tracking o Offer management and appointment letters o Automated onboarding workflows and document collection o induction program automation, induction alerts, and induction feedback. 2. Core HR & Employee Records <ul style="list-style-type: none"> o Centralized employee database with organizational hierarchy mapping o Digital storage of employee records and forms o Integration with student/member database for validation 3. Payroll & Benefits <ul style="list-style-type: none"> o Salary structuring, payroll automation, and statutory deductions (PF, TDS, gratuity, leave encashment) o Benefits administration (medical reimbursements, TA/DA claims, allowances) o Final settlement automation for superannuation, resignation, or transfers o Salary processing, statutory deductions, final settlements, and payslip generation. 4. Time & Attendance 	
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		<ul style="list-style-type: none"> ○ Centralized attendance system with biometric/digital integration ○ Leave management and encashment workflows (HR → Finance integration) ○ Holiday calendar and shift scheduling with shortage alerts. <p>5. Performance & Appraisal</p> <ul style="list-style-type: none"> ○ Automated Annual Confidential Report (ACR) ○ Configurable weightage and reporting for appraisals ○ Integration with PLI scheme for performance-linked incentives ○ Consolidated MIS for performance management <p>6. Learning & Development</p> <ul style="list-style-type: none"> ○ Centralized training certificate repository ○ Course/qualification request automation with HR approvals ○ Induction program automation with alerts and feedback <p>7. Exit & Transfer Management</p> <ul style="list-style-type: none"> ○ Online exit interviews ○ Automated handover checklist for transfers ○ Final settlement alerts (Finance → HR) ○ Virtual desktop interface for transfer cases <p>8. Employee Benefits & Claims – Medical, education, conveyance, TA/DA, gratuity, and insurance claims.</p> <p>9. Compliance Management – PF, ESI, TDS, and labor law compliance with automated updates.</p> <p>10. Self-Service Portals (ESS/MSS) – Employee and manager access for requests, claims, and approvals. Employee dashboard and self-service Reports</p> <p>11. Analytics & Reporting – HR dashboards, compliance reports, and workforce planning tools.</p>	
19.	ERP – HRMS Module	<p>HRMS Functional Requirements across HQ, Chapters, Regions, and CCGRTs and Section 8 companies</p> <p>The proposed Human Resource Management System (HRMS) shall be designed to digitize, automate, and streamline HR operations across the Institute. The system must be configurable, scalable, and capable of accommodating future change requirements. The following functionalities are to be included within the scope of implementation:</p> <p>1. Performance & Reporting</p> <ul style="list-style-type: none"> • Automated Annual Confidential Report (ACR) generation integrated with the existing system. • Integration with PLI Scheme for performance-linked incentives. 	Directorate of HR



		<ul style="list-style-type: none">• Configurable weightage and reporting for performance evaluation.• Consolidated MIS System for ACR reporting and analytics. <p>2. Training & Certification</p> <ul style="list-style-type: none">• Centralized Training Certificate Repository accessible across all the offices and directorates <p>3. Leave & Claims Automation</p> <ul style="list-style-type: none">• Leave Encashment Automation with workflow integration between HR and Finance (Payroll).• TA/DA Claim Automation for Council Members and employees.• Medical Reimbursement Automation with digital submission and approval workflows integration between HR and Finance (Payroll).• Children Education Expense Reimbursement Automation with digital submission and approval workflows integration between HR and Finance (Payroll).• LTC Expense Reimbursement Automation with digital submission and approval workflows integration between HR and Finance (Payroll).• Loans / Advance application Automation with workflow integration between HR and Finance (Payroll). <p>4. Attendance & Recruitment</p> <ul style="list-style-type: none">• Centralized Attendance System with biometric/digital integration.• Recruitment Automation including appointment letters, casual employee attendance, and onboarding workflows. <p>5. Employee Engagement</p> <ul style="list-style-type: none">• Tools for employee engagement such as birthday/anniversary reminders, daily thoughts, greetings from management, and feedback system. <p>6. Exit & Transfer Processes</p> <ul style="list-style-type: none">• Exit Process Automation including online exit interviews, induction program automation, induction alerts, and induction feedback.• Final Settlement Alerts (Finance → HR) for timely closure of dues.	
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		<ul style="list-style-type: none"> Virtual Desktop Interface for transfer cases or alternate methods. Automated handover checklist for transfers. <p>7. Office Orders & Contractual Employees</p> <ul style="list-style-type: none"> Office Orders Automation with digital signatures. Casual/Contractual Employee Process Automation including salary and payroll automation. <p>8. Integration & Approvals</p> <ul style="list-style-type: none"> Integration with student/member database with OTP validation. Automation of address change requests, Family particular update request, passport applications, NOC requests, educational / qualification update etc. with approval workflows. HR Notifications Automation for timely communication. Joining Request Automation for new employees. <p>9. Calendar & Alerts</p> <ul style="list-style-type: none"> Holiday Calendar with monthly shortage attendance alerts. Automation of course/qualification requests with HR approvals. <p>10. Document & Records Management</p> <ul style="list-style-type: none"> Centralized Repository for HR documents. HR Gallery for organizational records. Chapter Activities Recordings for archival and reference. <p>11. Configurability Requirement</p> <ul style="list-style-type: none"> The HRMS must be configurable enough to cater to any future change requirements, ensuring flexibility to adapt to evolving organizational policies, statutory compliance, and operational needs. 	
20.	ERP – HRMS Module	<p>Some of the following HRMS related Dash board, self-services, E- service book requirements are illustrated here:</p> <p>1. Employee Dashboard: Provision of a comprehensive employee dashboard with the following features:</p> <p>A. Display of Updated Information:</p>	Directorate of HR

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		<p>I. Applied application status</p> <p>II. Leave balances (all types)</p> <p>III. Education details</p> <p>IV. Present and communication addresses</p> <p>V. LTC details (availed/pending blocks)</p> <p>VI. Family particulars (dependents and nominees)</p> <p>VII. Trainings attended</p> <p>VIII. Penalty imposed (if any)</p> <p>IX. Achievements (if any)</p> <p>X. Leave Memorandum</p> <p>XI. Attendance Discrepancies (weekly/monthly/yearly/user defined)</p> <p>XII. List of empanelled hospitals</p> <p>B. Employee Self-Service Functionalities:</p> <p>I. Uploading of latest photographs</p> <p>II. Updating mobile numbers and email IDs</p> <p>2. Know Your HR (KYHR) Section: There is a requirement of dedicated section on the employee dashboard to host:</p> <p>I. HR policies and service rules (e-book format with chapter/schedule-wise access)</p> <p>II. FAQs</p> <p>III. Forms (e.g., family particulars, passport annexures, leave forms etc)</p> <p>IV. Formats for undertakings (e.g., foreign travel)</p> <p>V. Formats of Attendance sheet</p> <p>VI. Important circulars and office orders (organized year-wise)</p>	
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		<p>VII. SOP (Single point of contact)/ Time Schedule</p> <p>3. Application Submission Processes: Currently, the following employee-related processes are managed manually through physical submissions. To improve operational efficiency and streamline workflows, it is proposed that these processes be integrated into the ERP system:</p> <p>A. Process for applying for ID/Medical card</p> <p>B. Process for applying for Outside employment permission</p> <p>C. Process for applying Passport NOC (new/renewal)</p> <p>D. Process for applying for Higher education/certificate courses/ CS course (Concessional for employees and dependents)</p> <p>E. Process for applying issuance of Official certificates (Experience letter, service, salary, employment, etc.)</p> <p>F. Process for applying Transfer requests</p> <p>G. Process for applying Earned Leave encashment (with forwarding to Directorate of Finance)</p> <p>H. Process for applying for Corrections in address, nominee/family details, personal details, education, blood group, etc.</p> <p>I. Process for applying Request for nominating to attend particular Training for enhancement of skills.</p> <p>J. Process for applying foreign travel permission</p> <p>K. Process for applying Preventive health check-up</p> <p>L. Process for applying LTC approval (with route) and generate LSO on approval</p> <p>M. Process for applying HR grievance (e.g., sexual harassment, performance/memorandum representations etc.)</p> <p>N. Process for applying Salary advance</p> <p>O. Process for submit Resignation and exit interview</p>	
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	<p>P. Process for applying Maternity benefits</p> <p>Q. Process for applying for Reimbursements of children's education and medical expenses.</p> <p>R. Process for applying Membership and withdrawal requests for Employee Club and Thrift Society</p> <p>4. Document Generation Facility: ERP should support automated generation of:</p> <p>A. LTC approval/sanction orders</p> <p>B. Preventive health check-up letters</p> <p>C. Leave /long leave sanction orders</p> <p>D. Leave memorandums (e.g., maternity leave, LWP, unauthorized absence)</p> <p>E. Generate memorandums for various compliances.</p> <p>5. Real-Time Data Updates</p> <p>A. Attendance data should be fetched and updated in real-time.</p> <p>1. Notification System Real-time notifications (at their email id) to employees upon approval of:</p> <p>A. Leave requests</p> <p>B. Passport NOC</p> <p>C. Higher education requests</p> <p>D. Notification of expiry of Casual leave / compensatory leave etc./ Over-stay after expiry of leave/ Accumulation of maximum earned leave (i.e. 300 and above).</p> <p>E. Other HR-related submissions</p> <p>F. Non submission of leave/ attendance discrepancies (weekly/ monthly/ yearly/ user defined)</p> <p>G. Validation in while applying Combinations of leave</p> <p>I. NOC Clearance</p>	
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		<p>2. Retiree Portal: Extension of ERP (Limited access) to retired employees with:</p> <p>A. Dashboard access</p> <p>B. Medical facility details</p> <p>C. Preventive health check-up requests</p> <p>D. Update contact details (address, mobile, email)</p> <p>E. Medical/pension card issuance</p> <p>F. Uploading of life certificate</p> <p>1. Implement Validation in calculating weekly/ monthly working hours mechanism.</p> <p>2. Implementation of the flexi hours in the current mechanism of ERP.</p> <p>1. Issue in the calculation of Earned and sick leave once the year changes.</p> <p>3. Make provision of E-Service Book in ERP Module which contain the following</p> <p>A. Updated details of employee profile, nominee details, Basic pay, LTC, Leave availed /balance etc. as on 1st January or 1st April of ever year.</p> <p>B. Employee have to e-verified his/her details of E-Service book on yearly basis.</p> <p>Employee's Claim system (Children Education, Medical – OPD,</p> <p>Medical- Hospitalization, LTC, Holiday Conveyance etc), Staff</p> <p>Attendance (Regular & contractual, agency), Form 16 distribution</p>	
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		<p>to the employees (Regular & contractual) through email, Staff</p> <p>Attendance (Regular & contractual, agency)</p> <p>The ERP system should be developed into a comprehensive, standalone platform that functions as a one-stop solution for all HR-related processes and employee services</p>	
21.	ERP - Project Management module	<p>The Institute proposes the implementation of a comprehensive ERP Project Management Module to streamline and integrate all aspects of infrastructure development projects, including construction of new offices and related facilities. The scope of this system will cover the following functional areas:</p> <p>1. Project Planning & Scheduling</p> <ul style="list-style-type: none">• Define project objectives, milestones, and timelines.• Create detailed Work Breakdown Structures (WBS) and Gantt charts.• Resource allocation and dependency mapping.• Progress monitoring and variance analysis (planned vs. actual). <p>2. Bill of Quantity (BOQ) Management</p> <ul style="list-style-type: none">• Preparation and storage of BOQ for each project.• Automated linking of BOQ items with procurement and costing modules.• Version control for BOQ revisions.• Integration with contractor billing and reconciliation. <p>3. Drawings & Documentation</p> <ul style="list-style-type: none">• Centralized repository for architectural, structural, and electrical drawings.• Folder management with controlled access rights.• Versioning and approval workflows for updated drawings.• Integration with statutory approval processes. <p>4. Financial Costing & Budget Control</p> <ul style="list-style-type: none">• Estimation of project costs (materials, labor, overheads).• Budget allocation and monitoring against actual expenses.• Variance analysis and cost forecasting.• Integration with ERP finance modules for compliance and audit readiness.	Infrastructure & Buildings Maintenance



		<p>5. Statutory Approvals</p> <ul style="list-style-type: none">• Workflow for submission and tracking of statutory approvals (municipal, environmental, fire safety, etc.).• Document management for compliance certificates.• Alerts for pending or expiring approvals. <p>6. Contractor Billing & Contract Management</p> <ul style="list-style-type: none">• Contractor onboarding and contract creation.• Automated billing based on BOQ and work progress.• Payment tracking and reconciliation.• Contract lifecycle management (renewals, amendments, closures). <p>7. Infrastructure Assets Management</p> <ul style="list-style-type: none">• Asset registry for newly created infrastructure.• Tagging of assets with property type, chapter grading, and area.• Lifecycle tracking (installation, maintenance, depreciation).• Integration with facilities management systems. <p>8. eProcurement Portal</p> <ul style="list-style-type: none">• Online tendering and bid management.• Vendor registration and qualification.• Automated comparison of bids against BOQ and budget.• Transparent procurement workflows with audit trails. <p>9. MIS Reports & Analytics</p> <ul style="list-style-type: none">• Dashboard for project progress, cost, and resource utilization.• Customizable MIS reports (financial, operational, compliance).• Drill-down analytics for BOQ, contractor billing, and asset management.• Exportable reports for management and statutory bodies.	
22.		Required functional Requirements under Project Management & Infrastructure Development module are elaborated in detail here:	Infrastructure & Buildings Maintenance



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	<ul style="list-style-type: none">• Implementation of a comprehensive EPR Project Management Module for new office infrastructure projects.• Integration of Bill of Quantity (BOQ) preparation and management.• Centralized drawings repository for architectural and engineering plans.• Financial costing and budgeting of projects with real-time tracking.• Workflow for statutory approvals and compliance documentation.• Contractor billing and contract management module for streamlined vendor engagement.• Infrastructure assets management system for lifecycle tracking of properties.• Mapping of chapter grading, property type, and area classification.• Deployment of eProcurement portal for transparent vendor selection.• Generation of MIS reports for monitoring and decision-making.• Reference to industry-standard project management tools (e.g., Microsoft Project). <p>2. Property & Premises Management</p> <ul style="list-style-type: none">• Automation of processes for renewal of rented premises, shifting, and obtaining premises for the offices (CO/RO).• Creation of a digital repository of all owned property documents, searchable and indexed for easy retrieval. <p>3. Office Automation</p> <ul style="list-style-type: none">• Implementation of a comprehensive E-Office automation system for paperless workflows.• Automation of bill processing system with approval hierarchies.• Deployment of meeting management software for scheduling, agenda circulation, and minutes tracking. <p>4. Design & Engineering Tools</p> <ul style="list-style-type: none">• Provision of building design software with references to CAD, STAAD, and Primavera.• Integration with project management modules for seamless design-to-execution workflows.	
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		<p>5. Building Maintenance & Compliance</p> <ul style="list-style-type: none">• Standardized maintenance activity checklists with predefined timelines.• Digital submission of maintenance details by chapters.• Inspection workflows for HQ officials, including inspection report submission. <p>Mapping of infrastructure guidelines compliance with automated alert notifications for deviations</p>	
23.	Contract Management	<p>Contract Management: <i>The solution must provide comprehensive functionality to manage and track contracts throughout their lifecycle, including, but not limited to:</i></p> <ul style="list-style-type: none">• Centralized Contract Repository<ul style="list-style-type: none">○ Store all customer, vendor, and service contracts in one place.○ Attach digital copies and maintain metadata (start date, end date, contract type).• Contract Lifecycle Management<ul style="list-style-type: none">○ Define contract terms, validity periods, and obligations.○ Track contract initiation, execution, expiry, and renewal.• Expiry Tracking<ul style="list-style-type: none">○ Automatic monitoring of contract end dates.○ Dashboard view of active, expiring, and expired contracts.• Renewal Reminders & Notifications<ul style="list-style-type: none">○ Configurable alerts (e.g., 60/30/15/7 days before expiry).○ Email/SMS/app notifications to responsible stakeholders.○ Escalation workflows for overdue renewals.• Financial Integration<ul style="list-style-type: none">○ Link contracts to billing, invoicing, and revenue recognition.○ Auto-generation of renewal invoices or purchase orders.• Compliance & Audit Trail<ul style="list-style-type: none">○ Maintain version history of contracts.○ Ensure regulatory compliance with audit logs.• Reporting & Analytics<ul style="list-style-type: none">○ Renewal rate analysis and revenue forecasting.○ Contract aging, performance, and obligation tracking.	Headquarter , CCGRTs, Regional Offices, Chapters Offices and Section 8 companies



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		Advanced Features <ul style="list-style-type: none">• Workflow Automation – auto-create renewal contracts with updated terms.• Integration with CRM & Service Modules – ensures service tickets or obligations are tied to valid contracts.• Mobile Access – renewal alerts and contract details available on mobile devices.• AI-Powered Insights – predict renewal likelihood and flag high-risk contracts.	
24.	Placement portal	<p>The Portal enables students and members to explore training opportunities and job listings offered by companies.</p> <ul style="list-style-type: none">• Participation in mega placement drives organized by HQ, RO, and CCGRT, as well as training and placement initiatives conducted by regional chapters.• The platform also connects users to HR conclaves.• Integrates with external job sites and provides access to vacancy data from PSUs and banks. Visibility of the CS Placement Portal across the web and through marketing channels.• Sync between members, students, recruiters and institutes.• Configuration of payment for services offered.• Automation of complete placement activities.	Placement Cell
25.	Members Disciplinary Portal	<ul style="list-style-type: none">• Registration of complaints• Filing of written statements (WS)• Manages the complete workflow till the issuance of orders• Final orders are uploaded on the portal• e-Agenda management system adopted for committee meetings may also be extended for meeting of Disciplinary Committee and Board of Discipline. <p>The existing system may be continued till new rules will be in place. To be developed once the Central Government notifies the new rules.</p>	Discipline
26.	e-Agenda Management	This centralized portal is designed to efficiently manage and streamline the meeting agendas of the Institute's various Committees and Council, ensuring organized scheduling, seamless coordination, and enhanced accessibility.	
27.	Dynamic Real time MIS	Real time MIS, Dash Board for each Directorate for better execution and control of the activities in real time.	
28.	End-to-End Automation of	<ul style="list-style-type: none">• Centralized MOU Management system• Automation of NCLT Management system• Centralized Budget register	



	the Entire System	<ul style="list-style-type: none"> • Centralized Medical Reimbursement Module • Centralized Document Repository system • e-office automation system • Centralized Meeting management software system • Centralized Faculty creation and mapping system with respective programmes with Programme guidelines & Propagation to RO/CCGRTS/Chapters. • AI enabled services 	
29.	Mapping of Rules, Regulations, Guidelines, Compliances, Validations and SOPs to Automated Services	<ul style="list-style-type: none"> • Binding directives that must be followed (e.g., compliance rules, security rules). • External legal or statutory requirements • Recommended practices or advisory instructions (non-binding but best practice). • Automated prompts or suggestions in user interfaces. • Knowledge base integration for decision support. • AI-driven recommendations aligned with organizational standards. • Step-by-step instructions for routine operations • Workflow automation engines executing SOP steps • Task sequencing and escalation rules. • Automated documentation and reporting of completed SOPs. 	
30.	Data Migration of existing systems	All categories of existing data—whether structured, semi-structured, or unstructured—must be carefully migrated into the new system to ensure continuity, integrity, and accessibility. This includes historical records, transactional information, user-generated content, and any supporting metadata. The migration process should preserve accuracy, minimize downtime, and guarantee that no critical information is lost during the transition. Utilities will be made available to scan and upload physical files into the system repository in an organized manner.	
31.	ICSI Website (www.icsi.edu)	<ul style="list-style-type: none"> • Core Architecture • CMS-based Dynamic Website for flexible content management. • Dynamic Creation of Child Portals for chapters, regions, and specialized sections. • Data Migration from the existing website. • Annual Homepage Revamp for a fresh look. • Multiple Homepage Themes (minimum three) for customization. • Original Images with an in-built system to create copyright-free visuals. • Location Representation with addresses integrated into maps. • Visitor Count Tracking for analytics. • Archival Process for old data to maintain performance and compliance. • Advanced Functionalities • AI-enabled Features for automation, personalization, and intelligent insights. 	



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- A system to present published website content together with the number of likes and any comments received, with configuration options available for each individual post.
- Before publishing the website content, provision of preview mechanism must be provided.
- Provisions to Publish content as per schedule setup
- Provision to maintain version of the content on selected page.
- **AI Chatbot & Chat GPT Integration** for all stake holders support and engagement.
- **Dashboard-driven Insights** for administrators and members.
- **Content Lifecycle & Version Management** with rollback capability.
- **Audit Trails** for monitoring changes and accountability.
- **SEO Optimization** for better search engine visibility.
- **Search Functionality** for content across all pages.
- **On-demand social media Posting Provision.**
- **FAQs Section** for user assistance.
- **Like/Dislike Option** for pages to capture user feedback.
- AI-assisted writing tools generate blog posts, product descriptions, and landing pages.
- Smart grammar, tone, and SEO keyword suggestions.
- Auto-tagging and categorization of content for better organization.
- Dynamic content delivery based on user behaviour, location, and preferences.
- AI-driven recommendations (e.g., "related articles" or "products you may like").
- Personalized landing pages for different audience segments
- Automated meta descriptions, alt text, and schema markup.
- AI-based site speed monitoring and performance tuning.
- Intelligent scheduling of posts across multiple channels.
- Automated approval workflows and content lifecycle management.
- AI-powered notifications for outdated or underperforming content.
- Chatbot integration for customer support.
- Voice search optimization and conversational interfaces.
- Multilingual content translation and localization.
- AI-driven threat detection and anomaly monitoring.
- Content moderation using machine learning filters
- API-driven architecture for connecting CRM, ERP, and marketing tools.



		<ul style="list-style-type: none">• Integration & Interoperability• Seamless Integration with all Institute services (internal and external), mobile apps, WhatsApp services.• API Integration with external systems and existing ICSI databases.• Social Media Integration for wider outreach.• User Experience• Responsive Design for mobile and desktop users.• Enhanced Navigation with modern UI/UX standards.• Role-based Access Rights for controlled visibility.• Restricted Content Access for sensitive information.• Configurable Services for student and member-centric processes.• Compliance & Security• GIGW Compliance (Guidelines for Indian Government Websites).• Regular Security Audits for data protection and compliance.• WCAG (Web Content Accessibility Guidelines) by W3C for inclusivity:<ul style="list-style-type: none">• Perceivable: Alt text for images, captions for videos.• Operable: Keyboard/voice navigation.• Understandable: Predictable, readable content.• Robust: Compatible with assistive technologies.• Target AA Conformance.• Multilingual Support• Support for diverse stakeholders across regions.• AI Chatbot• ChatGPT• Content Lifecycle & Version Management	
32.	ICSI Visitor Gate Pass Module	This application is maintaining ICSI visitors' history and issuing Gate pass containing Visitor's Photograph for entry in ICSI premise and provision of signature of the Officer concerned for exit of the visitor	General Administration
33.	Bulk Mail Services	Used for sending Bulk Emails and APIs are used for sending transactional Email through Various Applications	
34.	Bulk SMS Services	Used for sending Bulk SMS and APIs are used for sending transactional SMS(s) through Various Applications	
35.	WhatsApp Services	1) Used for sending Bulk WhatsApp Message on User's request 2) An automated system to send birthday wishes to Members through WhatsApp Messaging service.	
36.	MARS	Monthly Activities Reporting System) for Regional Offices (Ros) and Chapters	
37.	CAPs	Career Awareness Programmes) Reporting System for all the offices of the Institute.	



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38.	E-Cart System	<ul style="list-style-type: none"> • E-Cart System - Order Management • Dispatch Management and Delivery Management and Reconciliation of money Received • Tax Collected and Deposited and Stock • Student Member data integration 	Purchase & Stores
39.	Printing and Publication Activities including Chartered Secretary Management System	<ol style="list-style-type: none"> 1. Call for articles from authors, with declaration, abstract and author details with PP size photo. 2. Checking for basic requirements as per Guidelines for Author. 3. Review of articles. 4. Receiving standard contents on Activity highlights, News from Institute, Miscellaneous corner from other directorates and communicating with them. 5. Receiving and processing of printing requisitions from various directorates. 6. Receiving of updated subscribers' members' database from Dte. Of Membership on monthly basis. 7. Application for subscription to CSJ for non-members. 8. Activities for Dispatch of Journal on monthly basis to all subscribers. 9. Managing queries regarding CSJ. 10. Smoothening of billing process from receiving bills by stores to payment by finance. 11. Managing and review of answers received for case study and crossword section. 12. Processing of Honorarium to Authors, Reviewers, Experts and Awards for best case study and crossword. 13. Receiving and processing of Advertisements-related communication for CSJ. 14. Sending bulk mail to all members and international members on call for articles for theme-based articles, global connect and research corner. 15. Vendor has to suggest the dispatch process of CSJ (free of cost). <p>Exclusive rights should be given only to Printing cell for managing the activities in the automated software and communicating with various stakeholders.</p>	Printing Cell
40.	Automation of the activities pertaining to various Award Functions of the Institute	<ol style="list-style-type: none"> 1. All processes related to various awards will be fully automated for efficiency and transparency. Call for option, AI based scrutiny and scoring, Digital Signature. 2. The application should be developed such that it must supports the creation, configuration, and mapping of diverse award categories. 3. Administrator can define and modify workflows tailored to specific award processes. 	Sustainability & Governance



		<ol style="list-style-type: none">4. The applications must enable creation of flexible question sets, including subjective, objective, sub-questions, and multiple-choice formats for various award categories.5. The applications must facilitate structured assessment by allowing mapping of evaluators across multiple levels for various award categories.6. Email and SMS services can be mapped at each configuration level for seamless notifications.7. Administrator can dynamically create email/SMS templates with predefined content to ensure consistent and efficient communication for various award categories.8. For every award category created, the system must automatically generate a dedicated access link. These links can be published on the official website, promotional materials, or shared through other channels to encourage participation.9. Allows generation of Management Information System (MIS) reports based on selected award types.10. In nutshell, the application to be developed and implemented must be generic, configurable for all the input screens, processes, and reports. It must also be able to handle the requirements of various award categories of the Institute irrespective of the award is being handled by different directorates.11. The complete application source code will be handed over to ICSI for internal use and future enhancements.12. The vendor must implement all security features and ensure data integrity, confidentiality, and protection against unauthorized access as well as accessible features for the physically disabled persons in the system. The vendor must submit the Security Audit Compliance Certificate and Accessibility Audit Compliance certificate from a CERT-In empanelled auditor for the developed systems.	
41.	Document Workflow Management (E-Office kind of System)	Streamlined movement and tracking of documents across departments within the institute with the facility of storing and accessing the same in the automated system. Objective is to establish a paperless office	Integrated Services
42.	Centralized Helpdesk & Ticketing System / Customer Relationship	<p>A unified and fully automated support system to handle queries, issues, and service requests across the organization.</p> <ul style="list-style-type: none">• Key Features & Benefits:	QRRT

Atulya



	Management (CRM) System	<p>Conversational Engagement – Stakeholders may reach out to ICSI via their preferred channels, including traditional methods (email, phone, SMS) and modern platforms (WhatsApp, Facebook, Instagram).</p> <ul style="list-style-type: none"> Self-Service – Enable stakeholders to find answers to common queries through automated responses and an integrated knowledge base, reducing dependency on manual assistance. Collaboration – Empower ICSI officials who are responding queries with a 360-degree view of stakeholder context, ensuring seamless query resolution through powerful routing tools and integrations with business-critical applications. Analytics & Admin – Track performance with real-time dashboards, ensuring efficient query management and decision-making based on data-driven insights. 24/7 Support with Away Experiences – Provide uninterrupted assistance with automated notifications and self-service tools, ensuring stakeholders stay informed even after office hours. <p>CRM, Chabot, WhatsApp payment, Chatbot interactive with serf driven mode with user mapping with citizen charter</p>	
43.	Common Service	Feedbacks, Blogs, Community forum for all stake holders	
44.	Learning Management System (E-Learning)	<p>To develop LMS with end-to-end integration and real time syncing from once process to another.</p> <p>Alternatively, ICSI to identify alternative LMS solution with cost minimization while retaining complete functionality and facilitating end to end integration for CPE, PCS orientation, CLDP etc.</p> <ul style="list-style-type: none"> Practicing units' Random selection Peer Review process Faculty Management system to shortlist and schedule a session reimbursement module Quality review board Peer Review Duplicate certificate fees e-Certificate generation by Admin/Stakeholders Hard copy of the certificate will be provided once the payment is made Students, members courses user registration process Content view 	PMQ



		<ul style="list-style-type: none"> • Video • Exam assessment • Preparation of Question paper and provisions to upload by respective directorates • Module/course wise completion certificate • Integration of exemptions • Result processing and automated validation. <p>All the above shall be in compliance with latest AI features.</p>	
45.	ChatGPT Integration	Deployment of ChatGPT for intelligent assistance, content generation, and user interaction.	IT
46.	AI-Powered Chatbot	A responsive chatbot to handle routine queries and provide instant support to users.	IT
47.	Integration of Advanced AI Features	Incorporation of AI capabilities such as predictive analytics, natural language processing, and intelligent automation in entire new system	IT
48.		<p>1.1.1 Outsourcing & Attendance</p> <ul style="list-style-type: none"> • Attendance management for the IT outsourced agency <p>1.1.2 Hardware & Software Management</p> <ul style="list-style-type: none"> • Issuance process for IT hardware/software to all ROs, Chapters, and HQ • Inventory record maintenance for hardware/software issued to ROs, Chapters, and HQ • IT hardware lifecycle management • Workflow for catering to IT hardware and software requirements for all IT staff • Gate pass management for IT hardware items <p>1.1.3 Budget & Financial Oversight</p> <ul style="list-style-type: none"> • Budget maintenance for all IT activities • Budget preparation for IT hardware requirements across HQ, ROs, and Chapters • SLA and purchase order management for hardware <p>1.1.4 Documentation & Governance</p> <ul style="list-style-type: none"> • Maintenance of all documentation pertaining to the Directorate of IT • IT policies and guidelines management • IT agenda and minutes management 	IT infra



		<p>1.1.5 Procurement & Vendor Management</p> <ul style="list-style-type: none"> • Tender process management, including scope of work, technical evaluation, comparative analysis, and verification of work orders • AMC renewal/extension of IT contracts • IT asset tracking under AMC/warranty workflows • IT vendor management • Management of all AMCs and services of the IT Directorate <p>1.1.6 Operations & Support</p> <ul style="list-style-type: none"> • IT ticketing management system • Management of meeting links and VC (video conferencing) slot scheduling 	
49.	Technology & Infrastructure Requirements	<ul style="list-style-type: none"> • Automation Tools: RPA (Robotic Process Automation), AI/ML, workflow engines. • Integration Needs: ERP, CRM, HRMS, finance systems, student life cycle, membership life cycle, examination life cycle, all automated services, and legacy platforms. • Data Management: Centralized databases, data migration plans, and security protocols. • Scalability & Cloud Readiness: Ensure solutions can grow with organizational needs. The Data Centre shall be deployed on a MeitY (Ministry of Electronics and Information Technology, Government of India) - empaneled cloud service located within India. • Loose Coupling: Each module should interact through well-defined interfaces (APIs) rather than direct dependencies. Ensure that if one module fails, others can continue operating independently. • Use microservices architecture or modular service boundaries. • Design modules to degrade gracefully instead of crashing • Run critical modules in containers or isolated environments • Design the unified solution with modularity, isolation, and resilience. Use microservices + event-driven communication + fault isolation, ensure that one module's exception doesn't disturb the rest of the system. <p>Risk & Challenge</p> <ul style="list-style-type: none"> • Implementation Risks: Knowledge gaps, resistance to change, irregular execution. • Vendor Risks: Ensure vendor accountability with SLAs and escalation paths. 	IT



	<p>Contingency Planning: Backup systems, phased rollouts, pilot testing.</p> <p>Organizational & Governance Structure</p> <ul style="list-style-type: none">• Roles & Responsibilities: Define BPR team members, IT leads, process owners.• Change Management Plan: Communication, training (Technical, Operational, hand-hold sessions), and stakeholder buy-in. <p>Compliance & Legal: Adherence to industry standards, Section 8 company regulations, and data privacy laws.</p> <p>Best Practices</p> <ul style="list-style-type: none">• Start Small, Scale Fast: Pilot automation in one department before full rollout.• Continuous Feedback Loops: Regularly refine processes post-implementation.• Vendor Collaboration: Ensure vendors co-design solutions with process owners. <p>Holistic Approach: Align automation goals with organizational strategy, not just IT upgrades.</p> <p>Security & Compliance</p> <ul style="list-style-type: none">• Identity and access management (IAM): Apply least-privilege access controls.• Data encryption: Encrypt data both at rest and in transit.• Regular audits: Ensure compliance with standards like GDPR, ISO, or SOC2.• Network security: Use firewalls, VPNs, and private subnets. <p>Performance & Reliability</p> <ul style="list-style-type: none">• Load balancing: Distribute traffic across multiple servers.• Content Delivery Network (CDN): Improve latency for global users.• Caching: Use distributed caching to reduce database load.• High availability zones: Deploy across multiple regions or availability zones. <p>Cost Optimization</p> <ul style="list-style-type: none">• Right-sizing resources: Match compute/storage to actual demand.	
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		<ul style="list-style-type: none">• Reserved instances or savings plans: Reduce long-term costs.• Monitor usage: Use cloud-native tools to track and optimize spend <p>Backup & Disaster Recovery</p> <ul style="list-style-type: none">• Automated backups: Schedule regular snapshots of databases and storage.• Disaster recovery plan: Define RTO (Recovery Time Objective) and RPO (Recovery Point Objective). <p>Geo-redundancy: Store backups in multiple regions</p> <p>DevOps & Automation</p> <ul style="list-style-type: none">• Implement CI/CD pipelines for seamless deployments.• Use Infrastructure as Code (IaC) (Terraform, ARM templates, CloudFormation).• Apply blue/green or canary deployments to minimize downtime.• Automate scaling, monitoring, and patching.• Set up application performance monitoring (APM).• Track KPIs like latency, error rates, and throughput.• Monitor usage with cloud-native tools (AWS Cost Explorer, Azure Cost Management). <p>DPDP Rules</p> <p>The DPDP Rules, 2025 operationalize the DPDP Act, creating a rights-based, consent-driven framework for digital personal data in India. Organizations must embed compliance into BPR and cloud-hosted applications to ensure security, transparency, and accountability.</p> <ul style="list-style-type: none">• To ensure security and compliance, authentication is compulsory for all online services. Users must verify their identity either by entering valid login credentials or through one-time password (OTP) verification	
50.	DNS Services	ICSI DNS Service Management and migration of existing DNS records	IT
51.	Exclusive Mobile App	<p>Mobile Application with AI Capabilities</p> <p>Development of a dedicated mobile application to provide seamless access to all Institute services.</p>	IT



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52.	Study Material Vendor Management	<ul style="list-style-type: none">• Terms and Conditions of the Contract• Print order issued• Periodic issuance of material• Availability of stock• Vendor invoice• MIS - of print order issue and availability of Stock of the study Material and Publications• Delivery of Study Material by the vendor to the students as per the batches issued by the ICSI MIS to be sent on Daily, Weekly, Monthly, Quarterly, Annually, asset management, Batch processing, Material shipment process	Purchase & Stores
53.	Stock Management System	<ul style="list-style-type: none">• Stock of Study Material with RCs, Chapters and CCGRTs including Receipt issue and reconciliation with HQ• Stock of Branding Items and Publications with RCs, Chapters and CCGRTs including Receipt• Issue and reconciliation with HQ• Stock of Blank Answer books, Stock of any other Item including receipt issued and balance,• reconciliation process,• Integration with other third-party e-commerce websites, e-cart system, MIS reports	Purchase & Stores
54.	Automation of Stationery Cell	Paperless system for Stationery Cell operations	Purchase & Stores
55.	Automation of Purchase Department	<ul style="list-style-type: none">• E- Procurement system• Record Management System• Meta data for previous repository along with searchable images of the document• PO Management, Invoice management system• Vendor Management• Work flow management• Administrative Approval to CCGRT/RO/Chapters for Non-IT Capital Item• Mapping with Purchase Policy• Mapping with DOFP• P2P cycle• Linking with third party procurement portals• Audit trail, Rules, regulations, purchase policy, compliances (GST, TDS), ESG, GFR, DGS&D	Purchase & Stores
56.	Automation of Store Department	<ul style="list-style-type: none">• Automation of complete Day to Day functioning• Synch with Store Management system• Record Management System• Meta data for previous records along with searchable images of the document• Automation of dispatch process• Tack the orders, batch creation process, reconciliation process	Purchase & Stores



57.	Automated system for Weed out/Disposal/Sale/ Sale of scrap /Buy-Back	<p>An automated system designed to manage the complete lifecycle of assets, including weed-out, disposal, sale, scrap handling, and buy-back processes as per ICSI policy.</p> <p>AI integration with routine activities vis-à-vis response to stake holders</p>	Purchase & Stores
58.	e-Procurement System	<ul style="list-style-type: none">• Implementation of end-to-end digital procurement platform to manage purchasing and vendor interactions-including end to end solutions from requisition to inviting Quotations to Evaluation of Quotation to obtaining approvals to issuance of PO/WO to administration of Terms and Conditions of contracts to Processing of Vendor Bills to Maintenance of all Related Records.• MIS for needs of management for precise planning, estimation of expenses including needs of Internal Audit and/or internal control• Procurement Calendar• Automation of Contract Management• Automated synchronization with Government Procurement system• online e-cart portal with GST/Non-GST compliances, Integration with eCommerce websites like Amazon, Flip Kart• Automation of study material management• Automation of stock management• Automation of green note movement• Automation of bill processing• Automation of vendor management• To check Black listing of Vendors• Market Survey results• Best Quotes available in Public Domain• Geographic List of Sellers/Vendors with Address and Contact details• Verified Vendor Rating System• Smart Tender templates.	Purchase & Stores
59.	CSEET Portal for Complete Cycle of Proposed CSEET Examination	<ol style="list-style-type: none">1. Registration for CSEET2. CSEET Fee Reconciliation3. CSEET Excess Fee Refund4. Dispatch of Study Material5. Management of Student Database6. Pre-Exam Activities like Exam Centre Identification, Application processing Finalizations of Examination Centers and related correspondences and MIS etc.7. Examination Enrolment8. Exam fee Reconciliation9. Exam Fee Refund10. Question Paper requirement (Overall and Centre wise)11. Allocation of Roll nos. and generation of Attendance	Examination



		<p>Registers</p> <p>12. Scribe and Extra time applications processing through portal and generation of sanction letters or regret letters.</p> <p>13. Incorporation of the Scribe and extra time information in student records and also publish the same on admit cards.</p> <p>14. Break-up of Student Data and Centre wise allocation.</p> <p>15. Admit Card Generation</p> <p>16. Centre Management Dashboard</p> <p>(1) Allocation of Manpower to Exam Centers</p> <p>(2) Automated and Specific emails and Instant Messaging</p> <p>(3) Data Entry Screen for Exam Centre to update the exam data on day-to-day basis</p> <p>(4) Centre wise expenses reports and bill Processing</p> <p>(5) Mobile App for Centres for daily reporting</p>	
60.		<p>17. General Observer</p> <p>(1) General Observer City Wise Empanelment,</p> <p>(2) Allocation of Centre wise Duties,</p> <p>(3) Mobile App for General Observers</p> <p>(4) Daily Attendance & Reporting</p> <p>(5) Urgent Reporting</p> <p>(6) Bill Processing</p> <p>18. Answer Book Managements</p> <p>(1) Recording of receipt of Answer Books from Exam Centers on daily basis</p> <p>(2) Reconciliation of Actual Receipt 'vis' a 'vis' dispatch data reported by Exam Centre</p> <p>(3) Scanning of Answer Books (Handing over and taking over of Answer Books for scanning to be recorded)</p> <p>(4) Scan Quality Checking Mechanism</p> <p>(5) Data sharing to/from Agencies</p> <p>(6) Cloud storage of scanned answer books</p> <p>19. Examiners</p> <p>(1) Facility for empanelment of Examiners through online portal having log in account facility.</p> <p>(2) Generation of offer letter to examiners and offer letter download facility for examiners in their respective account on portal.</p> <p>(3) Acceptance of Examinership</p> <p>(4) Allocation of Answer Books</p> <p>(5) Digital evaluation of Answer Books by Examiners</p> <p>(6) Bill processing and payment reports generation</p> <p>(7) Email and SMS integration</p> <p>20. Result Processing</p> <p>(1) Various activities involved (to be discussed separately)</p> <p>(2) Generation of Result Registers</p> <p>(3) Generation of Result and Marksheet statements and hosting of result on designated portal.</p> <p>(4) Stage wise Merit list (All India, Region wise, city wise,</p>	Examination



		<p>center wise etc.) (5) (All India, Region wise, city wise, center wise etc.)</p> <p>21. Post Exam Activities</p> <p>1. Verification of Marks/ Certified Copies of Answer Books/Inspection of Answer Books (a) Online application facility for Verification of Marks/ Certified Copies of Answer Books/Inspection of Answer Books (b) Display of Application Status of Students (c) Allocation of Answer Books to verifiers (d) Allocation of Answer Books to Examiners after receiving comments from verifiers and further update thereon. (e) Incorporation of revised marks on result portal. (f) Various letters to students w.r.t. change of marks, change of result, no change etc. (g) SMS and email integration (h) Status and statistics reports</p> <p>2. RTI Portal (a) Separate utility is required for receiving and processing of RTI applications and releasing answer books for viewing by Students. (b) SMS and email integration (c) Status and statistics reports</p> <p>3. Rank list (All India, Region Wise and Chapter wise / Prize Awards/ Scholarships (a) Separate utility is required for generating Rank list (All India, Region Wise and Chapter wise), Prize Awards and Scholarships etc.</p> <p>4. Duplicate Marksheets, Transcripts and Education Verification by external organizations (a) Separate utility is required receive applications for Duplicate Marksheets, Transcripts and Education Verification by external organizations (b) Processing of for Duplicate Marksheets, Transcripts and Education Verification by external organizations (c) Generation of Duplicate Marksheets, Transcripts and Education Verification Letters. (d) SMS and email integration (e) Status and statistics reports</p>	
61.	CS Main Examination Portal for Complete Cycle of CS Main Examination (CS Executive and CS	<p>1. Registration for CS Executive and Foundation Programs 2. Fee Reconciliation 3. Excess Fee Refund 4. Dispatch of Study Material 5. Management of Student Database 6. Pre-Exam Activities like Exam Centre Identification, Application processing Finalizations of Examination Centers and related correspondences and MIS etc.</p>	Examination



Professional Programme)	<ol style="list-style-type: none">7. Examination Enrolment8. Exam fee Reconciliation9. Exam Fee Refund10. Question Paper requirement (Overall and Centre wise)11. Allocation of Roll nos. and generation of Attendance Registers12. Scribe and Extra time applications processing through portal and generation of sanction letters or regret letters.13. Incorporation of the Scribe and extra time information in student records and also publish the same on admit cards.14. Break-up of Student Data and Centre wise allocation.15. Admit Card Generation16. Centre Management Dashboard<ol style="list-style-type: none">(1) Allocation of Manpower to Exam Centers(2) Automated and Specific emails and Instant Messaging(3) Data Entry Screen for Exam Centre to update the exam data on day-to-day basis(4) Centre wise expenses reports and bill Processing(5) Mobile App for Centers for daily reporting17. General Observer<ol style="list-style-type: none">(1) General Observer City wise Empanelment,(2) Allocation of Centre wise Duties,(3) Mobile App for General Observers(4) Daily Attendance & Reporting(5) Urgent Reporting(6) Bill Processing18. Answer Book Managements<ol style="list-style-type: none">(1) Recording of receipt of Answer Books from Exam Centers on daily basis(2) Reconciliation of Actual Receipt 'vis' a 'vis' dispatch data reported by Exam Centre(3) Scanning of Answer Books (Handing over and taking over of Answer Books for scanning to be recorded)(4) Scan Quality Checking Mechanism(5) Data sharing to/from Agencies(6) Cloud storage of scanned answer books19. Examiners<ol style="list-style-type: none">(1) Facility for empanelment of Examiners through online portal having log in account facility.(2) Generation of offer letter to examiners and offer letter download facility for examiners in their respective account on portal.(3) Acceptance of Examinership(4) Allocation of Answer Books(5) Digital evaluation of Answer Books by Examiners(6) Bill processing and payment reports generation(7) Email and SMS integration20. Result Processing<ol style="list-style-type: none">(1) Various activities involved (to be discussed separately)(2) Generation of Result Registers
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	<p>(3) Generation of Result and Marksheet statements and hosting of result on designated portal.</p> <p>(4) Stage wise Merit list (All India, Region wise, city wise, centre wise etc.)</p> <p>(5) (All India, Region wise, city wise, centre wise etc.)</p> <p>21. Post Exam Activities</p> <p>1. Verification of Marks/ Certified Copies of Answer Books/Inspection of Answer Books</p> <p>(a) Online application facility for Verification of Marks/ Certified Copies of Answer Books/Inspection of Answer Books</p> <p>(b) Display of Application Status of Students</p> <p>(c) Allocation of Answer Books to verifiers</p> <p>(d) Allocation of Answer Books to Examiners after receiving comments from verifiers and further update thereon.</p> <p>(e) Incorporation of revised marks on result portal.</p> <p>(f) Various letters to students w.r.t. change of marks, change of result, no change etc.</p> <p>(g) SMS and email integration</p> <p>(h) Status and statistics reports</p> <p>2. RTI Portal</p> <p>(a) Separate utility is required for receiving and processing of RTI applications and releasing answer books for viewing by Students.</p> <p>(b) SMS and email integration</p> <p>(c) Status and statistics reports</p> <p>3. Rank list (All India, Region Wise and Chapter wise / Prize Awards/ Scholarships</p> <p>(a) Separate utility is required for generating Rank list (All India, Region Wise and Chapter wise), Prize Awards and Scholarships etc.</p> <p>4. Duplicate Marksheets, Transcripts and Education Verification by external organizations</p> <p>(a) Separate utility is required receive applications for Duplicate Marksheets, Transcripts and Education Verification by external organizations</p> <p>(b) Processing of for Duplicate Marksheets, Transcripts and Education Verification by external organizations</p> <p>(c) Generation of Duplicate Marksheets, Transcripts and Education Verification Letters.</p> <p>(d) SMS and email integration</p> <p>(e) Status and statistics reports</p> <p>5. Additional Requirements</p> <p>1. Individual and Independent process Cycle for each session/type of Examination e.g. CS Main Examination (June & December Sessions) and CSEET (June, October & February Sessions)</p> <p>2. Flexibility of on Demand Examination</p>	
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62.	STIMULATE portal CPE	<p>Member Stimulate portal a CPE Certificate</p> <p>A link should be provided: (Member by login to link can fill self-declaration cases, specially reading articles and viewing videos titles and gist,) it has to be downloaded collectively of all the members on daily basis, and then it can be uploaded to their CPE certificates.</p> <p>Link may also provide for Maternity and Medical CPE credits exemption (if possible because their medical certificates, able to be downloaded)</p> <p>A flash message may be provided: on the top of the CPE certificate, (A maximum of 8 unstructured CPE credits may be availed through webinar mode. The remaining 4 unstructured CPE credits must be availed from the other modes like self-declaration) above said link. "Please refer to the FAQ on CPE credits, provided in this link."</p> <p>Automate dispensing of the CPE credits information through SMS/ E-mail, to all the incomplete CPE Members on monthly basis and in the month of March weekly basis, as it is mandatory to complete the CPE credits.</p> <p>Auto deletion feature of duplicate programme which recorded twice in the CPE certificate due to the technical problem, sometimes this double count is misleading the credits total.</p> <p>Mapping of all guidelines, policies, council decisions with all directorates.</p> <p>Versioning of documents, Document comparison, Geo Tagging for attendance of members in event management module, mapping of hierarchy of committees with respective directorates.</p>	Corporate Law



		<p>Members more than 60 Years age: It is not clearly distinguished in the CPE certificate regarding their CPE certificate for 6 unstructured and 4 structured CPE credits.</p> <p>Carry forward issue: A member availed 8 CPE credits through one programme in the extended period, he had short of 2 CPE credits, the balance 6 CPE credits able to be carried forward to the next FY but due to the challenges faced by IT team not able to implement.</p> <p>Split of CPE credits: A Member attended the PMQ course of 15 structured CPE credits, but due to shortfall of only one CPE credit in the current year all the 15 credits are credited for the current year due to the challenges faced by the IT team. It is to be split, one CPE credit to be credited for the current year and the remaining 14 CPE credits to be carried forward to next FY.</p> <ul style="list-style-type: none">• Automation of NCLT monitoring system• Centralized MOU Monitoring system• Centralized Budget register• Centralized Medical Reimbursement Module• Centralized Document Repository system• e-office automation system• Centralized Meeting management software system• Centralized Faculty creation and mapping system with respective programmes with Programme guidelines & Propagation to RO/CCGRTS/Chapters.	
63.	Meeting Management Software, ATR tracking system, Document Repository System, Employee Information System, Employee Learning Management System	<ol style="list-style-type: none">1) A dashboard may be developed to display scheduled meetings [at the HQ Level], which will help avoiding duplication of meetings and lessen the need for frequent one-on-one interactions with the office of President for confirmation.2) A portal, [similar to MIS] may be developed, to manage and track Action Taken Reports (ATR) efficiently.3) A centralized repository may be set up to store all guidelines approved by the Council of the Institute, ensuring easy access and reference by the employees.4) An intranet system for the employees of the Institute that integrates various components including EPMS, ERP, Acts, Regulations, Service Rules, office orders, employee activities, ppts of training sessions, and newsletters. The repository of guidelines as referred above may also be included within this platform.5) Meeting management software's6) AI driven Document decision search for council decision7) All work flow systems provisioned with Digital Signatures8) Document management system with AI based9) Convert Council Meetings Recordings into textual decisions with AI based10) Searchable AI based Scanned pdf/image documents	Council Affairs



		<p>11) Mapping of all guidelines, policies, council decisions with all directorates.</p> <p>12) Versioning of documents, Document comparison, mapping of hierarchy of committees with respective directorates.</p> <p>13) Performance Evaluation of the Council, its Committees and Functional Domains</p>	
64.		<p>eAgenda Management system:</p> <p>Role-based access control (RBAC): Ensure each directorate accesses only its own agenda items and documents.</p> <p>Data encryption: Use end-to-end encryption for agenda files, communications, and meeting recordings.</p> <p>Audit trails: Maintain logs of who accessed or modified agenda items to ensure accountability.</p> <p>Dynamic ATR module: Link ATRs to agenda items with status updates and timestamps.</p> <p>Visibility controls: Show only relevant ATRs in council agendas (e.g., last meeting/current meeting).</p> <p>Versioning and history: Track changes to ATRs and maintain historical records.</p> <p>Grammar and clarity check: Use AI tools like Grammarly or Microsoft Editor to refine language.</p> <p>Rule compliance check: Integrate rule-based AI trained on organizational policies and government regulations.</p> <p>Dual vetting workflow: First pass for language, second for legal/rule compliance before final approval</p> <p>Unified dashboard: Display meeting schedules, room bookings, agenda status, and ATRs.</p>	Council Affairs
65.	EBF	Automation of Employee Benevolent Fund process	
66.	Centralized Faculty Management System	<ul style="list-style-type: none"> • Academic, Programme wise, author, Categorization of Faculty Management registration based on subjects, skills, students, members etc., • Faculty Management, • Translation of study material AI based software • Third Party Linking for inputs list of website/research website • Central repository • Plagism checker Software • Internal Meeting Management System with calling facility for Employees • Publications/Study material repository • All communications to HR to be digitalized 	Academics



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67.	Digital Facilities for Task Management, Communication, and Website Content Updating at ICSI	<ul style="list-style-type: none">• Facility for managing important tasks with a reminder system• Facility for managing appointments and meetings• Facility for managing Inbound Notes and Letters• Facility for creating Online Directory of Important Telephone Numbers, E-Mail Ids, Addresses, etc.• Facility for submission of Confirmation on regular updating of Website content by different Directorates / Units of ICSI• Dte Wise Task Monitoring by Secretary Office for all directorates• Automation of task management, work flow system needs to be defined• Decisions should reflect on websites and respective stake holders• All directorates Wise Task Monitoring system by secretary office• Manage Facility for council decisions and follow up till completion,• effective secretary office• Work flow system between all directorates, Secretary and President office.	Secretariat
68.	Automation of Auditor Appointment	<ul style="list-style-type: none">• Automation of Appointment Internal Auditor process (RO/CCGRT/Chapters)• Provisions to upload the internal audit report by the respective RO/CCGRT/Chapters• Automation of Bill Tracking system• Automation Document Tracking System (Green Notes)• Geo Tagging Internal auditor with digital signature by entering UDIN number• and submit report with predefined checklist• Internal Auditor appoint management system• Performance Audit with linking with task management system and link with HR• Observation/ATR report based on audit report with medium/critical/non critical• Linkage with e-Procurement management system, Vendor management, supplier management.• Invoice and Bill Tracking System	Internal Audit
69.	ICSI Career Awareness Programmes Portal for Schools/Colleges	<ul style="list-style-type: none">• Develop a unified CAP portal for Schools/Colleges for scheduling, and managing Career Awareness sessions. The portal will have school/college on boarding with address and contact details,• CAP event date• QR-based attendance of participants• Feedback collection post CAP• Schools/Colleges will use the portal to create their own CAP event	Directorate of Career Awareness Programmes



70.	HQ approval for conducting CAP/Fair etc.	<p>In principle approval of CAP/Fair etc., - RO & Chapters</p> <ul style="list-style-type: none"> • Submission of proposal • Recommendation of RD • Approval / Remarks of HQ • Reply to the proposer • Resubmission of proposal, if any • Approval of HQ • Reply to the proposer <p>Bills Management Automation of processing of bills (CAP, Fair etc.) received from RC's/Chapters, removing the sending of physical bills and invoices and online forward issuance of Approved bills to Dte of F & A for reimbursement of claims directly to Chapter bank accounts. (Enable online submissions, tracking of Bills/Invoices). Required filled for submission of bills</p> <ul style="list-style-type: none"> • Name of the RO/Chapter • Name of the Budgetary head to which the amount is to booked • Budget provision as per the approved budget for the financial year • Amount utilized (prior to instant proposal) • Balance available • Expenditure as per the instant proposal/ bill • Net balance available <p>Data Analysis Create a way to collect online demographic data from the visitors of our social media channels for developing outreach towards the visitors.</p> <p>CAP Reporting System</p> <ul style="list-style-type: none"> • CAP dashboard to capture real-time data from ROs' and Chapters. • Real time outreach and conversion analytics • A single dashboard for all chapters and regional offices to share updates about career awareness programs, event schedules, and resources. <p>Communication & Outreach Enable multi-channel communication (Email/SMS/WhatsApp) with consent management and chatbot integration in ICSI website and visit meter in our website for better outreach.</p> <p>Communication to Schools/ Colleges: - Automated scheduling of mail on the basis of updated excel sheet to the provided mail.</p>	Directorate of Career Awareness Programmes
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		<p>Real time MIS MIS of CAP – HQ/RO/Chapters</p> <ol style="list-style-type: none"> 1. Date & Time of CAP 2. Complete detailing of school/Collage 3. Detailing of students 4. Name of the resource person 5. Photographs of CAP/fair 6. Comparison between targets and actuals <p>MIS – CS Mitra</p> <ol style="list-style-type: none"> 1. Details of CS Mitra 2. No. of Students registered by them 3. Payment status <p>Real time resignation Status Student Registration</p> <ul style="list-style-type: none"> • CSEET registration • Executive (Direct registration) <p>Stock & Printing of CAP related material</p> <ol style="list-style-type: none"> 1. Automation of printing process for CAP related material like pamphlet, backdrop etc., 2. Automation of distribution of material 3. Module to take care Minimum stock mechanism 	
71.	Portal for CS Mitra	<ul style="list-style-type: none"> • Complete cycle for CS Mitra starting from Submission of application, • Approval of application • Allotment of Unique code • Intimation to the CS Mitra as well as respective RO/Chapter • Automation of release of payment • Auto intimation of payment to the individual etc., • The system covers the complete workflow, including registration, number allocation, submission of bank details, undertakings, integration with student registration processes, reimbursement management, and generation of MIS reports with chapter-wise, region-wise, and city-wise insights. 	Directorate of Career Awareness Programmes
72.		<ul style="list-style-type: none"> • AI-powered integration with legal portals to automatically retrieve case status updates. Deployment of legal software solutions such as Provakil for streamlined case management. • Clickable case titles enabling direct redirection to corresponding legal websites. Tender comparison tool for analyzing historical and current tender data. • Advanced search capabilities within tender documents by name, publication date, or legal vetting status. Daily case tracking system for consistent monitoring and updates. 	Law



		<p>Strategic identification of AI implementation opportunities across legal operations.</p> <ul style="list-style-type: none">• Third party websites link up• Repository system for all cases• Legal document vetting, previous, similar jobs and customized job requirements• Unified case management system and reference to third parties for case updates• Documentary repository for law cases for offline documents with AI integration• Tender comparison with E-procurement	
73.		<ul style="list-style-type: none">• UDIN and ECSIN modules to enhance functionality and user experience. Seamless integration with the membership portal via Single Sign-On (SSO) for unified access.• Faculty management system linked to each event or program for streamlined coordination.• Faculty Travel monitoring system to track and manage official travel activities efficiently. Workflow-based automation of the approval process for second ECSIN generation. Implementation of validation checks during ECSIN generation to ensure data integrity.• Track report of ECSIN and UDIN search activities by external agencies.• Linkage of firm registration data with UDIN generation for improved traceability.• Verification process for both UDIN and ECSIN.• Streamlined member address update process for accurate and current records.• Archival strategy for the UDIN repository to ensure secure and organized data retention.• Integration & Synch with Peer Review• PCS Orientation programme• PCS portal• PCS Skill directory• Programme Dash board• Event calendar• Integration of UDIN, ECSIN with membership module.• Digital Signature	Professional Development
74.		<ul style="list-style-type: none">• Dedicated email to members with ICSI Domain/new name with minimum cost with disclaimer, Technical & User training, more services to members, implementation of a centralized storage system using Virtual Desktop Infrastructure (VDI) or alternate technologies, accompanied by platform enhancements and migration of the entire solution to the upgraded platform version.• Ensure that the backup of computers is taken on an immediate basis of the employees of the Institute [AD and	Council

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		above to begin with]. Implement measures preventing data deletion from systems upon retirement, transfer, or similar events, and to establish a robust protocol to safeguard such data. <ul style="list-style-type: none">• Implement Dte/designation wise e mail system in place, then name based, considering the change of profile of employees including transfers.	
75.	Requirements Gathering Sheet of CCGRT's/RO's/ Chapter's Office related Day to day /Routine activities/ Administrative work ERP related activities (RO/Chapter) Finance and Accounts Purchasing Inventory Stock Management	Digital document creation, storage and retrieval, Location based attendance system, Online Expenses reimbursement module, Online Library Management System, Gate pass module, Assets Tagging, Visitor pass system, Inter Department/HOD-Subordinates approval process shall be through dashboard., Auto-follow-up reminders for pending approvals, MoUs, procurement, AMC renewals etc., Auto tracking of AMC contracts (expiry, renewal reminders). Schedule meetings and appointments. Follow organization's administrative SOPs, Ensure confidentiality of sensitive information. TDOP Completion Certificates of the participants should be uploaded through a single Excel file. The current system is time consuming and has certain restrictions on the screen. The carry forward of the registration to another batch may also be explored. Financial Accounting – COA automation, JV workflow, auto-posting from modules, real-time financials. Accounts Payable – 3-way invoice match, digital approvals, tax automation, e-payments, AP aging. Accounts Receivable – Online receipts, bank reconciliation, digital invoicing, AR aging & reminders. Budgeting & Fund Management – Online budgeting, budget vs. actuals, commitment control, multi-fund tracking. Asset Accounting – Auto asset creation, depreciation, RFID/barcoding, transfers & disposal, physical audit. Cash & Bank Management – Digital cash/bank book, auto bank reconciliation, petty cash workflow, treasury tracking. Compliance & Reporting – Automated GST/VAT/TDS, audit trail, financial MIS dashboards Requisition & Approvals – Online PR, workflow approvals, DoA, budget check. Vendor Management – Digital onboarding, vendor rating, vendor master, e-tender/e-RFQ. Purchase Orders – Auto PO creation, workflow approvals, amendments/version control, online PO release. Contracts & Rate Agreements – Contract/AMC management, rate contract alerts, auto vendor selection. Receiving & Verification – GRN automation, QC workflow, integration with Inventory & AP. Invoice Processing – 3-way match (PO-GRN-Invoice).	RO/Chapter



		<p>discrepancy handling, AP posting.</p> <p>Procurement Reporting – Cycle time tracker, pending PR/PO/GRN, spend analytics, vendor performance.</p> <p>Item Master & Warehousing – Standard item master, warehouse hierarchy, barcode/QR tagging.</p> <p>Stock Receipt & Issue – Auto stock-in, MIR workflow, real-time stock updates, stock returns.</p> <p>Transfers & Tracking – Inter-store transfers, issue tracking, lot/batch/serial tracking.</p> <p>Reorder & Replenishment – Reorder alerts, auto PR, expiry tracking.</p> <p>Physical Inventory – Cycle counts, barcode verification, discrepancy workflows, audit trails.</p> <p>Valuation & Reporting – FIFO/Weighted Avg/Standard cost, inventory ledger, closing stock, consumption reports.</p> <ul style="list-style-type: none"> • Auto tracking of assets (CCTV, IT equipment, furniture, consumables). • Receipt entry and automatic reconciliation with invoices • Credit notes / debit notes automation • Cost estimation and approval workflows • PR to Purchase Order (PO) conversion • Advance payment and balance tracking • Automated approval workflow (employee → reporting officer → finance) 	
76.	<p>HRMS (RO/Chapters)</p> <ul style="list-style-type: none"> • Employee Self Service • Attendance management system • Reimbursement <p>Report requirements</p>	<ol style="list-style-type: none"> 1. App Based attendance System of employee 2. Online Expenses reimbursement module. 3. Weekly Reporting System of day to day work assignments 4. LCM report to be send using digital signature for the authority. 5. Access for claim status shall be through Dashboard. 6. Auto reminders for performance appraisal cycles, probation completion, contract expiry. 7. Issue of ID cards from the ERP 8. Generation of experience letter of service from the ERP as & when required instantly. 9. Medical Reimbursement balances can be checked through ERP by Employee. 10. Automation of Child Education Allowance 	RO/Chapter
77.		<p>CAPS (Career Awareness Programme)</p> <ul style="list-style-type: none"> • QR Code based attendance and automated certificate of participation on Student Email ID once registered • Location based attendance system • Mega-CAP / Teachers' • Prepare presentation materials • Conference / Career Fair planning • Budgeting • Impact analysis 	RO/Chapter

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	<ul style="list-style-type: none">• Post-benefit evaluation, approvals, logistics, and post-event reporting should be automated Identify resource persons (CS professionals, ICSI representatives, or trained Rajkot Chapter counsellors)• Integration of CAP guideline• MARS (Monthly Activity Reporting System)• Management Committee Meetings: Preparation of Agenda, Notes on Agenda & Preparation of Minutes. E-voting system,• Organizing regular CRT classes for Executive and CSEET Programme students• Scheduling sessions, allocating faculties, and maintaining timetables• Managing student registrations and fee collections• Monitoring attendance and performance• Coordination for demo classes and academic support• AI-enabled teaching aids (interactive quizzes, real-time polls, engagement analytics)• Announce CRT batch, coordinate with students, fix faculty for CRT batch etc <p>WhatsApp / Bulk mail / Bulk SMS</p> <ul style="list-style-type: none">• Customized for Chapters, Request for bulk mails shall be submitted through task with work flow-based system.• Mobile app support for sending alerts, notification, Program flyer send to the members and students, send details on WhatsApp <p>Event Management / Training</p> <ol style="list-style-type: none">1. TDOP Registration through Online Portal.2. Member Program & Student Training Program attendance through App3. Customized Email invite to Faculty in Stimulate Portal with Thank You Email & Feedback reporting4. Refund system in Stimulate portal for Fee Refund5. Online Faculty Feedback of Sessions of TDOP/EDP/CLDP submission by the students after the sessions in the simple way systematically6. Event objective definition and categorization (seminar, workshop, conference, internal training, external training)7. Geo tagging for attendance of members for each event and mapping with credit hours automatically.8. Automate the validation process of trainer, training completion certificate has to be uploaded by the trainer only, mapping of exemption process with guidelines <p>Accounts Payable</p> <ul style="list-style-type: none">• Accounts Receivable, POS (point of Sale)• General Ledger	
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	<ul style="list-style-type: none">• Fixed Assets• Reconciliation: BRS / CMS• Investment Module• TDS / GST / E-Invoice compliance• Grants, Reimbursement• Report requirements, Balance Sheet• Accounts Payable (AP)• Automated vendor invoice capture with 3-way matching (PO-GRN-Invoice).• Digital workflow for invoice verification and approval.• Automatic tax calculation (GST/TDS or equivalent).• Electronic vendor payments with bank integration.• Real-time AP aging analysis and vendor reconciliation• Online receipt generation for student fees, grants, consultancy income, rentals, etc.• Automated bank reconciliation with bank feed/statement upload.• Digital invoicing for external services (research consultancy, projects, training).• AR aging, reminders, and collection tracking dashboards• Automated GL Master financial book where all transactions from every module get posted and consolidated.• Automated asset registration during purchase/acquisition. Depreciation calculation and GL posting.• Asset tagging (Barcode/RFID) and tracking.• Asset transfer, reassignment, disposal/write-off workflows.• Physical verification module with audit trails.• Automated bank reconciliation required.• Recording and monitoring all investments.• Tracking maturity dates, interest rates, renewals, and withdrawals.• Automatic interest calculation and posting to accounts.• Alerts for maturity, renewal, and reinvestment.• Reporting on investment performance and balances• Submission of claims (travel, conveyance, official expenses, etc.) through physical with supporting documents• Auto-interest accrual & maturity posting• Automated TDS deduction based on section, rate & PAN status• Automated allocation of approved budgets to departments/units/project• Prepare vouchers and enter voucher data to tally <p>TDS (Tax Deducted at Source): System automatically calculates TDS on applicable payments, generates TDS entries, challans, and return files.</p>	
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		<p>GST (Goods & Services Tax): Automatic GST calculation on purchases and sales, GST summary reports, input/output reconciliation, and return preparation.</p> <p>E-Invoice Compliance: Supports generation of e-invoices, IRN (Invoice Reference Number) creation, QR code printing, and integration with the government e-invoice portal Grant may give by HQ as per the Guidelines it is to be automated based on the student's remigration and Reimbursement also to be online, documents may be updated at CCGRT/RO/Chapter level.</p> <ul style="list-style-type: none"> - Automatically updated from the General Ledger, reflecting all transactions accurately. - Provides key financial statements and reports to track performance, compliance, and decision-making - Dedicated portal should be lunch to track and submission of the all the bills/claim/reimbursement to Head office of the Chapter - Date wise trial balance - Flexibility for Sub-ledger under one supplier is required - Program wise income & expenditure - Instrument wise investment report. - Income & expenditure of the CCGRT, RO or chapters - Budgetary control - Budget V/s Actual - The Accounts Receivable (AR) module - Automation of preparing I&E and BS <p>Automation of invoice process</p>	
78.		<ul style="list-style-type: none"> • Inputs required to do Research to get opportunities to CS profession • Connect between Deans and Academic directorates • Regulator Interaction for new Opportunities <p>End-to-End automated services:</p> <ul style="list-style-type: none"> • Implementation of "Zero Physical Touch" for all administrative and procedural services. • Integrate with government websites (e.g., MCA) via API <p>Advanced Technologies:</p> <ul style="list-style-type: none"> • Robotic process automation. • AI powered chatbots and virtual assistance. • Predictive analytics and dashboards 	<p>Directorate of Perspective Planning & Financial Services, Futuristic Research and CPIO (RTI Cell)</p>



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		<p>Digital records & Secure data management:</p> <ul style="list-style-type: none">• Migrate all existing records to cloud based systems with compliance to DPDP Act 2023 and cyber security standards.• Create a digital vault for mark sheets, certificates, and sensitive documents accessible via secure digital ID's. <p>Learning & Assessment Platforms:</p> <ul style="list-style-type: none">• Upgrade elearning platform, e-books, and digital study material.• Introduce virtual skill lab, online simulation and remote proctoring for exams.	
79.		<ul style="list-style-type: none">• Travelling Management System for Council members/delegates/Faculties• Ticket booking system• Digital signature• Work flow-based system• Meetings room booking system	President Office
80.		<ul style="list-style-type: none">• Website (CMS based)• Dedicated Sections on website• Media gallery• Press release• ICSI mobile app• AI based Content management website• Task based system for bulk mail/sms/WhatsApp• Event Management System: Foundation Day, National/international level events, WhatsApp based payment services• Decentralized bulk mail/sms system	PRCC
81.	Automation of the activities pertaining to dte. of Coordination	<p>ICSI Chapter Management Guidelines, 2024</p> <p>Section I Preliminary</p> <p>1 Short title and Commencement</p> <p>2 Applicability</p> <p>3 Definitions</p> <p>Section II Chapters</p> <p>4 Constitution and Jurisdiction</p> <p>5 Registers of Members and Students</p> <p>6 Functions of the Chapter</p> <p>Section III Managing Committee</p> <p>7 Composition</p> <p>8 Declaration of Interest</p> <p>9 KYM (Know Your Member)</p> <p>10 Resignation</p> <p>11 Absence from Meetings</p> <p>12 Casual Vacancy</p>	Coordination



	13	Functions of the Office Bearers of the Managing Committee	
	14	Sub-Committees	
		Section IV Election and Nomination	
	15	Election and Nomination to the Managing Committee of Chapters	
		Section V Meetings	
	16	Meetings of Managing Committees	
	17	General Meetings	
	18	Resolution by Circulation	
		Section VI Finance and Accounts	
	19	Fund	
		Section VII Opening and Closing of Chapter	
	20	Opening, Closing and Reconstruction of Chapter	
		Section VIII Duties and Responsibilities of In-Charge of the Chapter	
	21	Officer and Staff of Chapter	
		Section IX Evolving Chapters	
	22	Constitution and Jurisdiction	
	23	Managing Committee	
	24	Declaration and KYM	
	25	Infrastructure	
	26	Finance and Accounts	
	27	Meetings	
	28	General	
		Section X Miscellaneous	
	29	Co-ordination	
	29A	Regional Director	
	30	Infrastructure	
	31	Programmes	
	32	Branding	
	33	Financial Guidelines	
	34	Defect of Constitution or vacancy in the Managing Committee not to affect its functioning	
	35	Newsletters	
	36	Formats	
	36A	MoU/Agreement	
	37	Removal of difficulties	
		Section XI Leadership Summit	
	38	Objective	
	39	Participants	
	40	Purpose	
	41	Frequency	
	42	Proceedings of the Summit	
	43	Budget	
	44	Awards	
	45	Reports and MIS on targets	
	46	Dress Code	
	47	Taking note of the Proceedings / Minutes of the Summit	
	48	Action Points	
	49	Feedback	



		<p>50 Review Meeting & Reporting</p> <p>51 General</p> <p>52 Removal of Difficulties</p> <p>Section XII Awards</p> <p>53A Authority</p> <p>53 Objective</p> <p>54 Applicability</p> <p>55 Categories of Awards</p> <p>56 Criteria of Assessment and Evaluation Period</p> <p>57 Grounds for Disqualification</p> <p>58 Venue for Presentation of Awards</p> <p>59 Reimbursements</p> <p>60 Participation</p> <p>61 Nomination</p> <p>62 Denominations of Award</p> <p>63 Feedback and Improvement</p> <p>64 Documentation and Record-Keeping</p> <p>65 Miscellaneous</p> <p>66 Removal of Difficulties</p> <p>Annexures</p> <p>67 Chatbot for internal issues with guidelines mapping, Election, chapter, region, council, contest with guidelines</p> <p>RO's and Chapters should be connected on a single platform individual rights</p> <p>All process related to various activities should be fully automated for efficiency and transparency</p>	
82.		<ul style="list-style-type: none">• Development of a separate application for CGI Online Endorsement in member account: The scope includes design and development of Endorsement of Member Verification Under ICSI-CGI(ICSA) MoU module to facilitate endorsement application form submission, online payment of application fee, approval at different levels and generation of approval/ rejection e-mails. Various MIS reports can be generated as required by the directorate• ICSI International Conferences (ME Conference, International Conference, IPDFP) – Refer ICGN & IOD Web Pages (Online Payment/Event Registration/Speaker Profile/Programme Schedule) (https://www.iodglobal.com/upcoming-events ; https://www.icgn.org/featured-events)• Request form for seeking details from prospective Sponsors/Speakers (https://www.icgn.org/featured-events/icgn-sponsorship, https://www.icgn.org/suggest-speaker)• Provision for Registration of Event Management companies for international conferences.	Corporate Communication and international affairs



		<ul style="list-style-type: none"> • Overseas Centers Web Pages (Event Registration Page, Payment Gateway for NPIO Membership) -Event Announcement • Facilitation Centre (At present, India Australia Facilitation Centre, Provision for 5 Countries: Middle East, Canada, USA, UK, Singapore) 	
83.		<p>IIP, RVO, ADR websites development, ERP for all section 8 companies</p> <p>RVO website:</p> <ul style="list-style-type: none"> • Member registration • Payment gateway integration • exam, certification • Sale of books • Linkage with IBBI • Annual/bi-annual report • Payment of membership fees, renewal of fees, payment reconciliation, refund process, national programs, • Online short-term programs, • Award of CPE hours, shortfall intimation, fees alert, real time information MIS, OTP facility, recruitment) <p>ADR website: Similar functionality is requirement of RVO and also Training programs, empanelment of arbitrators, mediation (registration, payment, selection of infra and services, orders/final verdict, challenge of verdict, online arbitration/mediation facility, recruitment)</p>	IIP, RVO, ADR, IGPI, NCLTPA
84.		<p>Bulk Email/SMS/WhatsApp services</p> <p>Scope of Work of Bulk SMS & WhatsApp services:</p> <p>ICSI is looking for SMS and WhatsApp Messaging Service Solution for HQ and its extended arms such as CCGRT, Regional and Chapter Offices (i.e., 80+ locations in India).</p> <p>Following is the Scope of Work/Features to be provided by Vendor:</p> <p>1. ICSI requires a comprehensive SMS and WhatsApp solution capable of sending SMS and WhatsApp Messages. All the services may be scheduled at the marketer's discretion, targeting specific segments or all SMS/WhatsApp on the Data list. SMS/WhatsApp Messages are triggered by customer actions and must be delivered reliably. Please refer:</p>	IT



	<p>a. Annexure – I for accessing complete details of hierarchy of Mass SMS of Campaign Management</p> <p>b. Annexure – II for accessing complete details of hierarchy of WhatsApp Campaign Management</p> <p>2. Campaign Management Features: The solution should include features such as campaign creation, campaign viewing, pausing/starting campaigns, campaign scheduling, callback request handling, and notifications.</p> <p>3. The solution should have the facility to configure corresponding SMS for WhatsApp Messages Templates, such that if any mobile number is not registered at WhatsApp, then corresponding SMS may be sent to that Number.</p> <p>4. A hierarchy of users should be created, with one (1) Super Administrator User responsible for user administration. After a group is created, it should be possible to add, delete, or modify users within the group."</p> <p>5. The system should support generating Short URLs and sending short URLs, media files (e.g., images, videos), and documents, and should be capable of receiving and acting upon the responses.</p> <p>6. Recipient Selection: Ability to select recipients/subscribers for SMS / WhatsApp campaigns and provide guidance for campaign creation.</p> <p>7. Personalization: Provide personalized services, including SMS / WhatsApp, birthday greetings, login credentials, etc., using CSV data imports.</p> <p>8. Template Library: Offer sample templates conforming to current market standards for instant campaign creation.</p> <p>9. Testing and Previewing: Allow testing and previewing of campaigns before execution, ensuring content accuracy, scheduling, duplicate removal, and high-volume handling.</p> <p>10. Scheduling and Rapid Sending: Enable scheduling of SMS / WhatsApp, rapid sending, queue management, test before sending, and send reminders.</p> <p>11. Dynamic Delivery: Support dynamic SMS / WhatsApp personalization, addressing recipients by name (e.g., 'Dear Member/CA./Mr./Mrs./Ms. So-and-So').</p>	
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	<p>12. Broadcasting Options: Support one-to-many or one-to-one SMS / WhatsApp broadcasting as per requirements.</p> <p>13. Supporting Language: For SMS and WhatsApp, please provide multi-lingual language support.</p> <p>14. Subscription Management: Allow recipients to subscribe/unsubscribe from SMS / WhatsApp, maintaining a suppression list for unsubscribed addresses.</p> <p>15. Logging and Distribution: Maintain detailed logs and distribution records, accessible till the contract lasts.</p> <p>16. Administrator Dashboard: Offer an admin login for ICSI administrators to manage SMS / WhatsApp campaigns securely.</p> <p>17. Reporting: Generate reports on campaign performance, including sent/open rates, bounce rates (hard bounce and soft bounce), opt-in rates, opt-out rates, click-through rates, unsubscribe, spam complaints, etc., with graphical representations. Report/Details should be generated individually campaign wise with free search based on parameters.</p> <p>a) In Particular campaign search particular mobile no. (mobile no. has been sent or delivered if delivered then show open time and how many times mail opens.)</p> <p>b) Show campaign scheduling date and time, creation of template date and time and completion of campaign date and time along with Alert facility.</p> <p>18. Database Management: Manage user databases efficiently, eliminating duplicates and ensuring maximum reach.</p> <p>19. Data Import: Support easy upload of subscriber information from various database formats via CSV, TXT, XLSX, PDF, MP4, JPEG, etc.</p> <p>20. Database Validation: Genuine typo errors (presence of punctuation errors like comma, semi colon, absence of @ symbol, etc.) and duplicates to be detected when a database is uploaded. They should be removed from the database, listed in a separate file and emailed back to the client. This is an automated mechanism.</p> <p>21. Database Security: Encrypt uploaded databases to prevent extraction or unauthorized access. The vendor</p>	
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	<p>should adhere to the policy of Data Localization and Data Protection Law as applicable.</p> <p>22. Bounce Management: In SMS and WhatsApp, please provide opt-in, opt-out data and DND, in exportable formats.</p> <p>23. Spam Check: Implement strict anti-spam policies and authentication measures.</p> <p>24. Integration with Stakeholder Database: System must have the capability to integrate ICSI database through API or Sync ICSI databases from the location through bulk upload.</p> <p>25. Integration with API: The Vendor must share the API integration kid to send SMS /WhatsApp through Custom Solutions used in ICSI.</p> <p>26. Backup: Provide a backup system capable of storing data for three years.</p> <p>27. Infrastructure Capacity:</p> <p>a) Hardware Infrastructure: Ensure adequate hardware resources to handle ICSI's broadcast volume, with 24/7 availability and non-working hour maintenance.</p> <p>b) Web Compatibility: Ensure web-based application compatibility with major browsers like Google Chrome, IE, Mozilla, Safari, any upcoming latest browsers etc.</p> <p>28. Support Requirements:</p> <p>g. Technical Support: Offer 24X7X365 technical support on email & phone for high-priority tasks during specified hours. The Vendor needs to facilitate SMS/WhatsApp services without any down time. In case of any failure, same needs to be fixed immediately and alternative service needs to be facilitated.</p> <p>h. Providing complete documentation of all system, features, training material and guidelines for mass SMS/WhatsApp services.</p> <p>29. The Vendor should provide SMS /WhatsApp Service through secured URL with which is enabled with SSL/TLS.</p> <p>30. The vendor must ensure to apply all security patches and updates to the platform of SMS/WhatsApp.</p>	
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Handwritten signature

Handwritten signature



	<p>31. Document/Image Hosting: System should offer separate options for hosting documents/images/Videos and integrating them into SMS/WhatsApp content.</p> <p>32. System should put in place a mechanism for regular intimation of de-provisioned/erroneous numbers which can then be eliminated from the list of recipients, thereby increasing the percentage of accurate deliveries.</p> <p>33. Vendor should have a ticketing mechanism for logging and tracking all the complaints raised by the ICSI.</p> <p>34. You should have redundancies in your servers and your gateways and details need to be given with architecture.</p> <p>35. The above list is not exhaustive. ICSI can ask to include more facilities other than listed above depending upon user convenience or business needs.</p> <p>36. Vendor needs to perform end to end testing before delivering the solution to ICSI for Final approval.</p> <p>37. Vendor should provide updates and upgrades as and when required during the contract period and implement the same without any extra cost to ICSI.</p> <p>38. There is no commitment from ICSI on minimum amount of Business, payments will be made on actuals.</p> <p>Scope of Bulk Mail:</p> <ol style="list-style-type: none">1. You are required to execute the contract as per following scope of work but not limited to:2. Bulk Mail Compatibility: The Software should facilitate to send Bulk Mail by providing a user interface through which the user can provide the message as per global MAIL Text standards along with images in various position of mail content and attachment and provide the interface to upload the list in Excel format (*.XLS / ..CSV) or text format (".TXT") for email ids to whom Mail is to be sent.3. Providing the web-based Mail facility solution to ICSI.4. The content editor should have the facility to convert the mail contents to HTML format and vice versa.5. Multiple dedicated User ids with privileges to access different groups and associated user logs/summary.6. The system should provide the authentication functionalities (multi-factor authentication, if, necessary) and create, modify and send mails to the group/groups according to the Permission level.7. Creation of hierarchy of users with one super administrator user for administration of users. After creation of a group,	
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	<p>subsequent additions or deletions or modifications to any group should be possible.</p> <p>8. Development of various reports as and when required</p> <p>9. Group Mail</p> <p>10. Facility to incorporate the images in various position of mail content and attachment(s) (allow for all formats like .pdf, .doc, .txt, .xls etc.)</p> <p>11. Facility for email Blacklist to Whitelist at user end</p> <p>12. Services: the company will ensure on daily basis that complete Mail system of ICSI is working fine. In case any kind of problem relating to the Mail system is reported by ICSI, the same shall be resolved within 2 hours from the time of lodging complaint.</p> <p>13. The software is unusable, resulting in total disruption - remedial service shall be provided by the company within 1 hours.</p> <p>14. Ensure that the mobile numbers as provided by the ICSI is protected and not shared with any third party or self.</p> <p>15. In case vendors use the data of the Institute for marketing or product promotions and the Institute receives any stakeholder's complaints on this, vendor will be liable under applicable legal or commercial terms and if there is any cost implication at our end on this, these will be transferred 100% to the vendor.</p> <p>16. All payment to be made on submission of invoice on monthly basis which will be subject to the deduction of tax at source wherever applicable as per the provisions of the Income Tax Act, 1961.</p> <p>17. There should be user reports and simple action that can be taken based on such user reports.</p> <p>18. No other costs, payments and expenses would be borne by the ICSI.</p> <p>19. No advance payment will be made.</p> <p>20. Provision of Test MAIL option for approval 1.20. Preview of Mail before sending</p> <p>21. Preview of Mail in various browsers and ISP mailboxes</p> <p>22. Scheduling Mail to later date and time</p> <p>23. Customized Mail facility</p> <p>24. importing data from CSV and txt format</p> <p>25. Automatic delete option for duplicate Email id's in the list</p> <p>26. Tracking of all emails through individual Email id.</p> <p>27. Online access to all the reports including customized reports as desired by ICSI</p> <p>28. Downloading Options for all the Reports</p> <p>29. Report Exporting in CSV format</p> <p>30. The successful bidder shall provide the MIS reports for all the bulk Mail date wise in a prescribed format on a monthly basis and whenever required.</p> <p>31. Whenever required by ICSI, successful bidder should be able to provide additional reports in a pre-specified format.</p>	
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		<p>32. Event Based Triggered Mail: Automatic Mail based on certain trigger using APIs</p> <p>The requirements outlined above are indicative in nature. The detailed scope, functional specifications, and process flows will be discussed, refined, and finalized in consultation with ICSI during the Business Process Reengineering (BPR) implementation period. Any modifications, additions, or exclusions identified during this phase will be incorporated to ensure alignment with organizational objectives, statutory compliance, and best practices.</p> <p>There may be 20% variation in the scope of work which would be mutually discussed.</p>	
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III GENERAL TERMS & CONDITIONS

1. Signing of Agreement

The successful bidder has to sign a Service Level Agreement and non-disclosure agreement for the entire duration of the contract effective from the signing of the agreement in line with the terms and conditions of the tender/RFQ document within 15 (fifteen) days from the date of awarding of the contract. Format/Sample of Service Level Agreement is annexed with this tender/RFQ document as Annexure F.

2. Duration of Contract

- a) Time is the essence of this contract. The delivery period for the whole project is 24 months from the date of signing of the agreement. Warranty period shall be of one year from the date of handing over the project successfully with acceptance of the ICSI.
- b) The duration of entire work would be Eight (8) years in following manner: -

	Work	Time Schedule
1.	Development and implementation of project.	Two years from the date of signing of agreement.
2.	Warranty period	One year from the date of handing over of project
3.	Annual Maintenance period (AMC)	Upon completion of the one-year warranty period, the AMC shall commence. ICSI reserves the sole discretion to engage the successful bidder, who implemented the solution, for a five-year AMC at the same prices as specified in the



	BOQ submitted at the time of bidding.
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- c) Further AMC of the project will be subjected to the yearly assessment / appraisal of the performance of the Bidder / Vendor for the previous year by the ICSI. If Bidder / Vendor's performance is not found satisfactory, the ICSI may terminate the agreement by giving 90 days' notice otherwise the agreement will automatically renewed. Decision of the ICSI in this regard shall be final.

3. Extension of Contract

On expiry of initial contract period (Two (2) Years Development and handing over + One (1) Year Warranty + Five (5) Year AMC), the ICSI reserves the right to extend / renew at the sole discretion of ICSI for a further period of maximum of Five (5) Years on yearly basis on mutually agreed terms and conditions between the ICSI and the Vendor in writing. Vendor shall not have right to claim renewal. Decision of the ICSI in regard shall be final. Vendor shall have no right or claim for the extension of the contract in any circumstances and decision of the ICSI shall be final and absolute.

4. The whole work included in the Tender shall be executed by the vendor and the vendor shall not directly or indirectly transfer assign or sublet the contract or any part thereof or interest therein to any other party without the written consent of ICSI.

5. Site for services is:

The Institute of Company Secretaries of India
C-36, Sector-62,
Noida-201309.

Or any other location as instructed by the authorized official of ICSI.

6. Security Deposit/performance guarantee

- a. The successful bidder has to submit the security deposit/performance guarantee in form of a Bank Guarantee from any Nationalized bank (format enclosed as **Annexure G**) to cover any loss or damage caused to or suffered by the Institute due to acts of commission and omission by the successful bidder or any failure on the part of the successful bidder in fulfilment of terms and conditions of the contract and conditions contained in the contract. The value of the Security Deposit/Bank Guarantee has to be of equivalent amount of 5% of the value of the contract. The Bank Guarantee has to be submitted within 15 days of issue of order but before execution of the contract. The Bank Guarantee shall have to remain valid for the entire duration of the Contract plus three months beyond the completion of contract period. The successful bidder shall not be entitled to any claim or receive any interest on the amount performance guarantee. The EMD of the successful bidder will be refunded after submission of the performance Guarantee/Security Deposit.

- b. The successful bidder having valid registration with NSIC on the date of submission of tender, are also required to submit requisite security deposit / performance guarantee.



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7. The vendor will not have any direct interaction on behalf of the Institute with any third-party agency engaged by ICSI.
8. All communications to the employees or third-party agencies engaged by ICSI would be through designated channels as directed by the Institute.
9. The personnel(s) employed / hired / engaged (permanent / regular / casual / contractual / temporarily / daily wage or whatever be the status / name) by the Vendor for the execution of work as provided under this RFP or the SLA, shall not be employee / officer of the ICSI for any purpose. None of such persons of the Vendor shall have any right to claim anything against the ICSI. The deputed technical officials in the ICSI from the Vendor's side must have the requisite qualifications and experience and must be in the payroll of the Vendor for the last one year.
10. Vendor will provide the profile of core members who will be assigned to work on this assignment. This should consist of one Program Manager and resident technical resources mentioned in below table who will carry out major tasks and two domain experts having relevant experience.
11. **Criteria for deployment of technical resources:**

S. No	Team Composition	Desired Qualification	No. of Personnel	Minimum Experience
1	Project Manager	Master's or Bachelor's degree in Computer/ IT or B. Tech in Computer from a recognized University through full-time education, supported by strong technical expertise, recognized project management certifications, and proven leadership abilities. Extensive experience in successfully managing and delivering complex projects.	1	10+ Years
2	Team Members	Master's or Bachelor's degree in Computer/ IT or B. Tech in Computer/ IT from a recognized University through full-time education. Student Modules: 1 Training Modules: 1 Membership Module: 1 Examination Modules: 1 Techno-Functional Resource (Finance, HRMS & Payroll, Inventory, Purchase, Project etc.): 4 e-Office Automation: 1 elearning: 1	12	3+ Years



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		eAgenda Management: 1 CCGRT/RO/Chapter Supports: 1		
3	Minimum Qualification for Functional resource (Procure to pay and Finance domain only)	CA/ICAI-Cost/MBA(Finance) (For Finance /Functional resource) with actual experience in accounting and functional setup under mentioned modules in RFP		
4	Certification	Minimum one certification pertaining to his / her profile is preferred		
5	Replacement Criteria (Equivalent resource replacement)	The replacement / addition / removal of deployed manpower at ICSI will be done with at least 1-month prior information & approval of ICSI. A non-approved manpower will be treated as no replacement and treated as per manpower absence and shall attract penalty as per the term specified in the RFP/WO. Frequent change in manpower will be not permitted, it may be done only once in a year		

- a. Change of developers shall not be permitted under normal circumstances. However, in situations beyond the bidder's control, ICSI may allow such a change, provided the replacement developers possess equivalent qualifications and experience.
- b. ICSI reserves the right to verify the above-mentioned credentials and submitted documents any time during the contract period and take appropriate action as per RFP /WO if find any fraudulent / subletting.
- c. The deployment of all manpower support personnel may be assessed by ICSI in totality (through interview/test) and ICSI reserves the right to request for a change, if ICSI is not satisfied, any time (even post-approval) due to capability and/or performance limitations/unsuitability or any other constraint. Vendor will promptly provide substitute for the same by providing forthwith similar or higher experience, qualification & capability. In case, there is a requirement for substitution/change of resource by vendor, the same shall be affected with due approval from ICSI (subject to abide of replacement criteria) and vendor will ensure smooth transition at no cost to ICSI.
- d. In case, the remote site at Regional Office / Chapter is to be provided service, the same shall be provided by taking the system on remote through the Central Site only.
- e. In case during exigencies, if vendor officials have to be relocated for handling the issue, then the applicable TA and DA shall be paid as per actual on submission of bills as per the norms of the Institute (ICSI).
- f. The Vendor shall be responsible for procuring all necessary licenses—covering software, platforms, tools, and any other components required for the successful implementation and operation of the project—on behalf of ICSI. All licenses must be

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[Signature]



obtained in the name of ICSI, and full ownership, rights, and entitlements shall rest exclusively with ICSI.

- g. The software licenses shall not be restricted based on location and ICSI & its group of companies should have the flexibility to use the software licenses for other requirements (if required)
- h. The system integrator should provide the requisite types of licenses for selected application, related database, middle-ware, any additional bolt-on third party tools (if proposed) and all other required tools and/or applications with sufficient number of user and product licenses
- i. ICSI will provide the Vendor with the required documentation and proof related to its status as an educational institution to enable the Vendor to avail applicable educational discounts during license procurement. The Vendor shall ensure that such discounts are appropriately applied and reflected in the pricing (if any).
- j. Additionally, the Vendor must furnish ICSI with complete details of all procured licenses, including license keys, validity periods, renewal terms, and associated documentation, and ensure compliance with all legal and contractual obligations.

12. Payment Terms:

Payment by ICSI shall be made on submission of certified invoice from time to time upon completion of work as per scope of the work and acceptance of the ICSI in writing. Payments shall be subject to deductions of any amount for which the Vendor is liable under the agreement against the contract. Further, all payments shall be made subject to deduction of TDS (Tax deduction at Source) as per the prevailing income Tax Act and any other taxes as on the date of invoice submission and/or payment date, whichever is higher.

All Payments shall be made in Indian Rupees only.

- a) AMC Service charges will be paid on quarterly basis at the end of each quarter for the preceding quarter against the bill only and the contracted rates shall remain valid till Five (5) years from the start date of AMC period. No invoice for extra work/change order on account of change order will be accepted by the ICSI unless the said extra work/change order has been authorized/ approved by the ICSI in writing.
- b) The vendor's request for payment shall be made to the ICSI in writing, accompanied by appropriate tax invoices including all supporting documents describing, as appropriate, the goods and related services performed, delivered, and accepted by ICSI.
- c) If any excess payment has been made by the ICSI due to difference in contracted price and vendor's invoice, the ICSI may without prejudice to its rights recover such amounts by other means after notifying the bidder or deduct such excess payment from any payment subsequently falling due to the ICSI.

13. Payment of Taxes

The vendor shall be responsible for and shall pay all taxes, duties, assessments or other charges of any kind or nature whatsoever levied by any government or governmental body on or in connection with the Services including without limitation all statutory levies, taxes, fee, duties, rate, charges, surcharges etc. and any other tax ("taxes") levied on service provided by the vendor. ICSI may withhold from payments due to the Vendor any amounts required with respect to the aforementioned taxes and to remit the same with the relevant authorities, in case of failure on the part of the vendor.



14. Infrastructure: Sitting arrangements with network connectivity at ICSI office will be provided by the Institute on requirement basis as assessed by ICSI and all other things including (desktop/laptop) will be managed by the vendor at its own cost. The Desktop/Laptop should be complied with the IT policy of ICSI.
15. In case any work for which there is no specification in the tender but required to be carried out for successful implementation, commissioning and delivery of the contracted work to its entirety, as per scope of work mentioned in the tender/ work order, such work shall be carried out by the vendor in accordance with the directions of the ICSI without any extra cost to the Institute.
16. In case of any damage or loss caused to the Institute due to breach of term or condition of the tender / contract, negligence, carelessness, inefficiency, fraud, mischief and misappropriation or any other type of misconduct of the bidder(s)/ vendor or its staff, the bidder(s)/vendor shall be liable to compensate the loss cause to ICSI and to pay damages. The Institute shall have right to adjust the damage / loss suffered by it from the security deposit / earnest money deposit / bank guarantee and / or to charge penalty as decided by the Institute. Decision of the Institute in this respect shall be final & binding.
17. The vendor shall be liable for accident, injury, losses due to any accident or negligence of their staff/workers and shall also be liable to incur all the expenses in consequence thereof and Institute is in no way responsible for any damages arising out of this tender/contract.
18. **GENERAL:**
 - (a) **Modification/variation in Terms of Contract:** ICSI reserves the right to modify or may bring some variation in the terms and conditions of the contract on mutually agreed terms, if it is found necessary due to any operational difficulty or any other genuine reasons.
 - (b) **Recovery:** Whenever under the contract through this tender, any sum of money is recoverable by ICSI from the vendor or / and payable by the vendor to ICSI, the ICSI shall be entitled to recover such sum by appropriating in part or in whole from the security deposit of the party. In the event of the security being insufficient or if no security has been taken from the party, the balance or the total sum recoverable, as may be, shall be deducted from any sum due to the party or which at any time thereafter may become due to the party under this or any other contract with the ICSI. If this sum is not sufficient to cover the full amount recoverable, the party shall pay the ICSI on demand the remaining balance due along with penalty.
 - (c) **Delivery and Acceptance:** Deliverables will be formally accepted after ICSI certifies acceptance of the deliverables and recommends for payments to the vendor within thirty (30) days from the date of submission of the deliverables. ICSI would generally not take more than four weeks for the acceptability of the deliverables. Any queries with regard to the deliverables will need to be answered by the vendor within a week.
 - (d) **Dispute Resolution:** Any dispute, difference, controversy or claim ("Dispute") arising between the successful bidder and ICSI hereinafter jointly to be called "parties" and singularly as "party" out of or in relation to or in connection with the



agreement/contract, or the breach, termination, effect, validity, interpretation or application of this agreement/contract or as to their rights, duties or liabilities hereunder, shall be addressed for mutual resolution by the authorized official of the parties.

- (e) **Arbitration:** If, for any reason, such dispute cannot be resolved amicably by the Parties, the same shall be referred to the Arbitration process. In the event of any dispute arising between ICSI and the vendor in any matter covered/ touched by this contract or arising directly or indirectly there from or connected or concerned with the said contract, the matter shall be referred to the sole arbitrator appointed by the mutual consent of both the parties. The decision / award of the Arbitrator shall be final and binding on the parties. Cost of Arbitration will be shared equally by the parties.
- i. The place of the arbitration shall be at the ICSI, 22, Institutional Area, Lodi Road, New Delhi.
 - ii. The Arbitration proceeding shall be governed by the Arbitration and Conciliation Act of 1996 as amended from time to time.
 - iii. The proceedings of arbitration shall be in English language.
 - iv. The parties are not entitled to approach any court of law without resorting to arbitration approach.
 - v. The decision / award of the arbitrator shall be final and binding on parties to the arbitration proceedings.
- (f) **Penalties:** The vendor will bear full responsibility for delays, which can be directly attributable to the sole actions and scope of work of the vendor, in the project timelines.

The timelines as provided by the ICSI is to be strictly followed for each and every activity. In case, the **Vendor** fails to adhere to the timeline submitted in the technical bid / or as approved by ICSI, a penalty of Rs. 5000/- per day will be levied. Total grace allowed in the project is sixty (60) days. In case, it is justified by the vendor and approved by the Institute that the delay is on account of any inaction on the part of the Institute and written communication has been provided to the Institute on this account, the penalty will not be enforced. Penalty in any case can't exceed 10% of the of the amount disbursed. In case of delay beyond 24 months in design, development and implementation, the Institute reserves the right to terminate the agreement and recover the cost paid plus damages (capped at an upper limit of 10% of the Contract Value) from the Bank guarantee /security / EMD / other measures.

- (g) **Documentation:** The vendor shall provide the following documentations in digitally signed soft copies (in USB / CD):
1. Application Architecture Document.
 2. Detail Project Plan
 3. Fortnightly progress reports
 4. System Requirement Specification (SRS) document containing detailed requirement capture and analysis including functional requirement, Detail Design Document, Interface Specifications, application security requirements.
 5. Complete Source Code with documentation.
 6. Test Plans and Test cases (including Unit Test Plan, System/Integration Test Plan, User Acceptance Test Plan, Security Test Plan, Load Test Plan)



7. Training Manuals
8. Systems Administration Manuals
9. User manuals
10. Installation / Deployment Manuals
11. Operational / Functional Manuals
12. Maintenance / Troubleshooting Manuals
13. Security policy and procedure for Portal including Password security, logical access security, operating system security, data classification, and application security and data backups.
14. Complete application IT security audit gaps resolution and compliance certifications

Documents mentioned from Sno. 7 to 14 should be provided in two stages

1. Before Training (payment milestone 7)
2. After Rollout (payment milestone 9)

- (h) **Security Audit:** It is the responsibility of the selected bidder to get the security audit of the portal atleast once a year/ need basis and should share the complete details of the audits along with copies of all communication and bug reports / removal, written or otherwise. Certificate of security audit completion/ VAPT report must be submitted with a validity of 1 year
- (i) **Inspection and Testing:** The inspection of installation of services shall be carried out to check whether the services are in conformity with the mentioned in the RFP. The **Vendor** will test all operations and accomplish all adjustments (tuning) necessary for successful and continuous operation of the systems to the satisfaction of the ICSI.

The acceptance test will be conducted by ICSI or any other person nominated by ICSI, at its option. There shall not be any additional charges for conducting acceptance tests. All software should be complete. The vendor shall maintain necessary log in respects of results of the tests to establish to the entire satisfaction of ICSI, the successful completion of the test specified.

- (j) **Intellectual Property Rights:** The Vendor shall ensure that it holds all necessary copyrights, license rights and other proprietary rights required in respect of any device or method used by it while providing the Services. The Vendor shall indemnify and hold ICSI harmless from and against any liability, penalty, cost or expense suffered or incurred as a result of Vendor failing to comply with his obligation under the Agreement.

Any software, hardware, data, awards, certificates, patents, and related outputs shall remain the exclusive property of ICSI. The vendor shall transfer to ICSI all Intellectual Property Rights associated with the developed solution, except for any complete off-the-shelf platform. Ownership of the source code pertaining to ICSI-specific customizations shall vest with ICSI. The vendor must deliver such customized source code to ICSI within fifteen (15) days from the date of system acceptance. At all times, the source code provided to ICSI shall be complete, accurate, and fully updated, corresponding exactly to the current production release of the software



(k) **Compliances of Law**

- A. The vendor shall provide the Services in strict compliance with all relevant laws and regulations of the State or Territory within India where the Services are being rendered and in accordance with the conditions of any permit, license or concession relating to any part of the Services, whether held by the vendor, ICSI or any other concerned party.
- B. The vendor shall indemnify and hold ICSI harmless at all times from and against any liability, penalty, cost or expense suffered or incurred as a result of the vendor failing to comply with any law, or regulation, or such permit or license relating to any part of the Services.

(l) **Operational Acceptance:** Successful completion of the contract will be gauged through a series of formal acceptance tests performed on all aspects of the system/sub systems:

In the go-live phase, vendor will have to manage and roll out a beta stage where the system will be made available and restricted only to the users in ICSI through an appropriate mechanism on the web, and conduct user acceptance testing of the System based on test cases developed by the Vendor in consultation with ICSI and validated by ICSI. Based on the test results, required changes will be carried out and tested. Post this, ICSI portal will be officially launched and operational acceptance will be complete.

(m) **Unit Test and System integration test**

1. Each module or Component should be fully tested independently before integration.
2. All specified functionality should exist. This testing verifies the as-built program's functionality and performance with respect to the requirements for the software product.
3. All System functions that are accessed through menus should be tested
4. After each module has been fully integrated to create a larger system, each module or sub-module must have a defined interface which will be used to call another program component.
5. Measuring response time, throughput and availability of Application.

(n) **Complete System Acceptance:** At the end of the System Acceptance period, ICSI will acknowledge complete system acceptance in writing to the successful bidder upon completion of the following:

1. All of the required activities defined in the bid document including all change requests agreed by ICSI and delivered by the bidder and accepted by ICSI.
2. All the requisite documentation as defined in this bid document including all changes agreed by ICSI and delivered by the bidder and accepted by ICSI.



3. All required training as defined in this bid document and delivered by the bidder and accepted by ICSI.
4. All identified shortcomings/defects in the systems have been addressed to ICSI's complete satisfaction.
5. In order to accept the system, ICSI must be satisfied that all of the work has been completed and delivered to ICSI's complete satisfaction such that all aspects of the system perform acceptably. The functional / logical acceptance of the system will only be certified when the proposed system is installed and configured according to the design and that all the detailed procedures of operating them have been carried out by the Bidder in the presence of ICSI staff.

(o) Operations and Maintenance

Annual Maintenance Scope for Application Monitoring & Support

1. Scope of Services

In accordance with the terms of this Agreement, the Vendor shall provide comprehensive Annual Maintenance Services (AMS) for all applications/Apps/Solution delivered and implemented under this project for a period of 5 years after one year warranty period completion. The scope of AMC encompasses proactive monitoring, preventive and corrective maintenance, performance optimization, security management, and continuous support to ensure uninterrupted, efficient, and secure operation of all critical applications and their integrations across ICSI's digital ecosystem. Vendor shall maintain delivered software application using the procedures of corrective maintenance as required:

(i) Application Monitoring

- 24x7 monitoring of all deployed applications.
- Coverage to include application uptime (minimum 99.99%), response times, transaction failures, integration points, and user access patterns.
- Automated alerting and escalation for anomalies, downtime, or performance degradation.

(ii) Security Management

- Continuous monitoring for vulnerabilities, unauthorized access attempts, and potential data breaches.
- Implementation of security controls, periodic security audits, and compliance with applicable data protection regulations (including DPDP Act, 2023) and any guidelines issued by the Government of India during the project tenure.
- Support for annual security audits and timely closure of audit findings.
- Submission of a valid Certificate of Security Audit Completion / VAPT Report (validity: 1 year).

(iii) Backup and Recovery



- Regular backup of application data, configurations, and system states in line with the defined backup policy.
- Periodic testing of backup restoration and execution of disaster recovery drills to ensure business continuity.

(iv) Reporting and Documentation

- Monthly and quarterly reports covering application health, incidents, resolutions, performance metrics, and maintenance activities.
- Maintenance of updated documentation for all applications, integrations, and changes implemented during the AMC/AMS period.

(v) Change Management:

- Controlled deployment of minor enhancements, configuration changes, and integration updates as per ICSI's change management process.
- Impact assessment and rollback planning for all changes.

(vi) User Support:

- Helpdesk support during business hours (or as agreed) for issue logging, tracking, and resolution.
- Knowledge base and user guidance for common issues and FAQs.

(vii) Additional Provisions

- System Reconfigurations:** The Vendor shall reconfigure the system/portal as and when new software version updates are released.
- Technological Updates:** Any new technological updates implemented by the bidder without prior approval of ICSI may be ratified during monthly reporting. Financial grants for such updates shall remain at the discretion of the Institute on an equitable basis.
- Mobile Application Support:**
 - Ensure compatibility with the latest versions of Android and iOS.
 - Update SDKs, APIs, and libraries to avoid compatibility issues.
- Performance Monitoring:** Continuous tracking of application speed, responsiveness, and uptime.
- Backend Optimization:** Optimization of backend services and databases for efficiency.
- UI/UX Updates:** Regular updates to UI/UX elements to maintain a modern and user-friendly interface.
- Integration Management:** Ensure smooth functioning of integrated services (e.g., payment gateways, maps, analytics).
- API Management:** Regular API version upgrades and compatibility checks.
- Bug Fixes:** Timely resolution of bugs in delivered features.
- Routine Maintenance:** Regular maintenance of servers, databases, and applications.
- Security Patching:** Application of security patches and updates on a regular basis.
- Scalability:** Implementation of scalers to handle peak loads as per requirements.



- m) **System Health Reporting:** Regular reports on system health and maintenance activities.
- n) **Infrastructure Review:** Periodic review of infrastructure performance with **corrective actions as necessary.**
- o) The Successful bidder is required to upgrade OS, DB, any other Software provided by them for providing cloud environment and hosting
- p) Vendor will be responsible for the renewal of supplied Software licences & services for continuous product update & support
- q) Vendor will be responsible for the renewal of Annual Technical Support (ATS) of all the component /software/accessories used for secure hosting and server configuration on Cloud, without any extra cost to ICSI
- r) Vendor will be wholly responsible for the compliance related to the provided software licences and services to ICSI to meet the scope of work of this RFP
- (p) **Jurisdiction:** In respect of any dispute arising between ICSI and the vendor in any matter covered / touched this tender / contract or arising directly or indirectly there from or connected or concerned with the said contract, the courts at Delhi shall only have the jurisdiction.
- (q) **Right to Blacklist:** ICSI reserves the right to blacklist a party / bidder for a suitable period in case such party / bidder
- fail to honour his bid without sufficient grounds or found guilty for breach of condition /s of the contract or guilty of fraud and mischief and misappropriation or any other type of misconduct on the part of party(s) / bidder(s).
 - Giving false, misleading or fake information/ document in the bid;
 - Withdrawing the bid after opening of the financial bids;
 - Refusal to accept Purchase/ Work Order at the quoted prices;
 - Failure to supply goods of the ordered quantity/ quality/ specifications at the agreed rates within the time schedule;
 - Adoption of any unethical or illegal practices;
 - Any other justified reason.
- (r) **Confidentiality:**
- i. The bidder(s)/ vendor shall not use or disclose any Confidential Information of the Institute except as specifically contemplated herein. For purposes of this tender / contract "Confidential Information" means information that: (i) is sufficiently secret to derive economic value, actual or potential, from not being generally known to other persons who can obtain economic value from its disclosure or use; and (ii) is the subject of efforts that are reasonable under the circumstances to maintain its secrecy or confidentiality.
 - ii. The successful bidder acknowledges that all material and information which has and will come into its possession or knowledge in connection with this agreement or the performance thereof, whether consisting of confidential and proprietary data or not, whose disclosure to or use by third parties may be damaging or cause loss to ICSI will all times be held by it in strictest confidence and it shall not make use thereof other than for the performance of this agreement and to release it only to employees requiring such information, and not to release or disclose it to any other party. The successful bidder agrees to ~~take appropriate action with respect to its employees to ensure that the~~



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obligations of non-use and non-disclosure of confidential information under this agreement are fully satisfied. In the event of any loss to ICSI in divulging the information by the employees of the successful bidder, the ICSI shall be indemnified. The successful bidder agrees to maintain the confidentiality of the ICSI's information after the termination of the contract also. The successful bidder will treat as confidential all data and information about the ICSI /Contract, obtained in the execution of this tender including any business, technical or financial information, in strict confidence and will not reveal such information to any other party.

(s) **Sub-Contracting:**

The Successful Bidder shall remain solely and fully responsible for the due performance of all obligations under this Contract. The Successful Bidder may, with the prior written consent of ICSI, engage subcontractors for the execution of specific deliverables. Any such subcontracting shall in no manner relieve, discharge, or diminish the Successful Bidder's obligations, liabilities, or responsibilities under this Contract, which shall remain absolute and primary

(t) **Statutory Compliance:** The successful bidder will be required to comply with all statutory obligations from time to time applicable to this contract.

(u) **TERMINATION:** ICSI may terminate this Agreement by giving a three (3) months' notice in writing to the other party for termination of agreement. Further, the Vendor can terminate the Agreement only on failure of the ICSI in performance of its obligation under this Agreement and the issue has not been addressed by ICSI upon communication of such failure.

The ICSI without prejudice to any other remedy, reserves the right to terminate the agreement in whole or in part by giving One (01) months' notice in writing in case Vendor fails to discharge its obligation under this agreement without sufficient grounds or found guilty for breach of condition(s) of the agreement, negligence, carelessness, inefficiency, fraud, mischief and misappropriation or any other type of misconduct by Vendor or by its staff or agent or in case there are more than 3 penalties on the Vendor in any month.

Any pending or unresolved operational issues, performance, unpaid fees and any other remedies shall continue by the Vendor during the period of termination notice and the same must be satisfied before this agreement is terminated. The ICSI may also put in place any other agency for carrying out the remaining work and expenditure incurred on same shall be recovered from the Vendor.

The Vendor shall have no claim to any payment or compensation whatsoever on account of any profit or advantage, which would have been derived from the performance of this agreement in full, but which he did not derive in consequences of the full performance of this agreement not having been carried out, nor shall he have any claim for compensation / damage for the loss suffered by him by reason of termination of agreement by the ICSI. No claim for interest will be entertained by ICSI with respect to any moneys or balances, which may be in its hands owing to a dispute between itself and the Vendor.



Vendor must return/hand over the data/Code of the complete project without any additional cost to the ICSI in case of Termination, End of the Contract.

(v) **EXIT MANAGEMENT CLAUSE:**

Clause: Exit Management, Transition & Knowledge Transfer

This clause shall be read in conjunction with the terms of the RFP and the Contract Agreement and is framed in compliance with the principles of transparency, accountability, risk mitigation and continuity of services as envisaged under the procurement framework of the Institute and Government Financial Rules (GFR) for consultancy/IT service engagements.

1. Objective

The objective of this Exit Management Clause is to ensure smooth, secure and complete transition of all deliverables, documents, knowledge assets, process designs, Source Code developed for ICSI, configurations, and associated intellectual property developed under the Business Process Re-engineering (BPR) project to the Institute, upon completion, expiry, termination or discontinuance of the contract for any reason.

2. Trigger Events for Exit Management

Exit management provisions shall become applicable in any of the following events:

- (a) Successful completion of the contract period;
- (b) Expiry of the contract without extension;
- (c) Termination of contract for default, insolvency, or breach of terms;
- (d) Termination for convenience by the Institute in public interest;
- (e) Mutual termination agreed between both parties.

3. Exit Management Plan

Within 30 days of award of contract, the successful bidder shall submit a detailed Exit Management Plan covering:

- (i) Transition methodology and timelines;
- (ii) Knowledge transfer approach;
- (iii) List of all artefacts, deliverables and documentation to be handed over;
- (iv) Data migration and system handover procedures;
- (v) Dependency matrix and continuity arrangements.

The Exit Management Plan shall be subject to approval of the Institute and shall form part of the Contract.

4. Obligations of the Vendor during Exit

Upon occurrence of a trigger event, the Vendor shall:

- (a) Provide full cooperation to ensure uninterrupted continuation of BPR initiatives and related IT/process reforms;
- (b) Transfer all project deliverables including but not limited to:
 - As-Is and To-Be process documents
 - SOPs, manuals, workflows, BRDs/FRDs
 - Configuration details, integration architecture
 - Dashboards, MIS formats, and reporting templates
 - Source Code developed for ICSI.
 - Technical resource support of the vendor till the migration of the entire project at no additional cost to the ICSI.

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- (c) Hand over all data, databases, analysis reports, models, and working papers in editable and reusable formats;
- (d) Provide complete knowledge transfer sessions to the Institute's officials and/or the new agency designated by the Institute;
- (e) Submit updated project status, pending issues log, and risk register at the time of exit;
- (f) Ensure removal of proprietary restrictions that hinder the Institute's continued use of deliverables created under the project.

5. Transition Support Period: The vendor shall provide transition support for a minimum period as specified in the Contract from the date of exit/termination/completion to ensure smooth handover and stabilization of processes implemented under the BPR project, without any additional cost unless otherwise approved.

6. Continuity & Risk Mitigation (Risk & Cost Provision)

In case of termination due to default of the vendor, the Institute shall have the right to:

- (a) Get the balance work executed through any alternate agency; and
- (b) Recover any additional expenditure incurred in completing the remaining work from the dues/performance security of the defaulting vendor, in accordance with contractual provisions and applicable procurement rules.

7. Return of Institute's Assets

The vendor shall return all records, documents, data, access credentials, manuals, and any other property belonging to the Institute within minimum days as specified in the Contract exit, duly certified by the authorized representative of the Institute.

8. Exit Review & Certification

An Exit Review Committee constituted by the Institute shall verify completion of all exit obligations. Final acceptance and release of performance security shall be subject to certification of satisfactory completion of exit management activities.

9. Survival of Obligations

The provisions relating to confidentiality, data security, intellectual property rights, indemnity, and audit access shall survive the termination or expiry of the contract.

(w) Force Majeure

- i. For the purpose of this Article, Force "Majeure" means any cause, which is beyond the successful bidder control or that of the Institute, as the case may be, which both could not foresee or with a reasonable amount of diligence could not have foreseen, and which substantially affect the performance of the order, such as:-

- War / hostilities
- Riot or civil commotion
- Earth Quake, Flood, Fire, Tempest, Epidemics, Pandemic, Lightning or other natural physical Disaster, Quarantine restricts and Freight embargoes
- Restrictions imposed by the Government or other statutory bodies, which is beyond the successful bidder control or of the Institute, which prevent or delay the execution of the order either by the successful bidder or by the Institute.



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ii. If a Force Majeure situation arises, the successful bidder are required to promptly notify ICSI in writing of such condition and the cause thereof within a period of three (3) days from the date of happening of such an event requiring invocation of this force majeure article. Unless otherwise directed by the ICSI in writing, the successful bidder will continue to perform its obligations under this order as far as is reasonably practical and shall seek all reasonable alternative means for performances of this order.

- (x) **Indemnity Clause:** The Vendor will indemnify ICSI against all statutory liabilities present and future arising out of this contract. In the event of violation of any contractual or statutory obligations, the successful bidder will be fully and solely responsible for the same. Further, in the event of any action, claim, damages, suit initiated against ICSI by any individual, law enforcement agency or government authority due to acts and omissions, the successful bidder will be liable to make good/compensate such claims or damages to the ICSI. As a result of the successful bidder action, inaction or any omissions, if ICSI is required to pay any damages to any individual, law enforcement agency or government authority, the successful bidder would be required to reimburse to ICSI such amount along with other expenses incurred by ICSI or ICSI reserves the right to recover but not limited to such amount from the payment(s) due to the successful bidder while settling its bills or from the amount of security deposit lying with ICSI. However, ICSI reserves its right to take legal recourse as permitted under law of the land. In case of any damage caused to the institution due to negligence, carelessness or inefficiency of staff of the vendor, the vendor shall be responsible to make good the loss. The ICSI shall have right to adjust the damage / loss suffered by it from the security deposit or / and to charge penalty as decided by the Institute. Decision of the ICSI in this respect shall be final & binding on the vendor.
- (y) The services indicated in **Part "C" (Financial Bid)** are tentative and may be increased / decreased at the sole discretion of the Institute and the vendor shall have no right to claim any minimum/definite/guaranteed volume of business.
- (z) **Disqualifications:** ICSI may at its sole discretion and at any time during the bid process, disqualify any bidder, if the bidder has:
- Submitted the bid documents after the response deadline.
 - Made misleading or false representations in the form, statements and attachments submitted as proof of the eligibility requirements.
 - Exhibited a record of poor performance such as abandoning works, not properly completing the contractual obligations, inordinately delaying completion or financial failures, etc. in any project in the preceding three years.
 - Submitted a proposal that is non-responsive.
 - Failed to provide clarifications related thereto, when sought.
 - Submitted more than one bid.
- Declared ineligible by the Government of India ("GoI"), for corrupt and fraudulent practices.



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- (aa) **Timelines for deliverables:** The following are the expected timelines for deliverables for implementation of the Project:

S. No	Deliverable	Time for completion
PART - 1	Phase - 1	Months 1-3
1.	Initiation, Study, Requirements gathering & Planning with timelines, System Specification, Current State Assessment, Documentation/Report, Approval & Sign-off	
	Phase - 2	Months 4-24
2.	Future State Design, Development, Minimum Viable Product Implementation & Rollout, Testing, Integration, Data Migration, System Testing, Documentation, Escalation matrix, Supply of Licences, Cloud Hosting Services, Project Acceptance Criteria (user sign-off on individual modules, Final Sign-off of complete project), Training & Handholding	
3.	Warranty Period (One Year)	Months 25-36
PART - 2	Comprehensive Support Post Go- Live	
1.	Maintenance & Support Activities	
2.	Support Verticals	
3.	Escalation matrix	
4.	Manpower	
5.	Cloud Hosting Services	
6.	Renewal of Software subscription licences	

The vendor will provide for the chart as above with details on each micro activity in the above macro heads and the timeline to be maintained for the same within 30 days of the execution of the agreement. In the timeline, the vendor will specify the exact dates and time required for consultation with each department to gather the requisite information. ICSI reserves the right to realign or shift the priorities of deliverables in accordance with its requirements.

The project shall be deemed accepted when all redesigned processes and supporting systems have been implemented in accordance with agreed specifications, validated against performance benchmarks, approved by stakeholders, compliant with regulatory requirements, and formally signed off by the ICSI.

For any details / clarifications, Praveen Kumar Veyikandla, Joint Director (IT) (0120-4522066), Email: praveen.kumar@icsi.edu may be contacted.

Date: 16.02.2026

(Dr. Prasant Sarangi)

DIRECTOR (Dte. of Purchase, Stores & Printing)



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(Annexure A)

HQ: ICSI HOUSE, 22, INSTITUTIONAL AREA, LODI ROAD NEW DELHI-110003
ICSI NOIDA OFFICE: ICSI HOUSE, C-36, SECTOR-62, NOIDA-201309 (UP)

ICSI/IT/ BPR/2025-26/127

February 16,2026

OPEN TENDER-TWO BIDS SYSTEM

Sub: RFP For “Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)”.

PART ‘B’ (TECHNICAL BID)

Form I: PARTICULARS OF BIDDER

(ALL COLUMNS ARE TO BE FILLED IN BLOCK LETTERS)

S No	Particular	Response
1	Company Name	
2	Address of the company (Pl. Enclose Proof)	
3	Contact details (Telephone/email/Fax)	
4	Web site	
5	Date of incorporation/registration (Pl. Enclose Proof)	
6	Date of commencement of business (Pl. Enclose Proof)	
7	Years in Business	
8	Net worth of the company/firm (Pl. Enclose Proof)	
9	Name(s) of the directors/Partners	
10	Names of the major customers	
11	Details of similar projects handled in the past five years (Pl. Enclose Proof)	
12	Current similar assignments on hand (Pl. Enclose Proof)	
13	Details of turnover in last three financial years (2022-2023, 2023-2024, 2024-2025). (Pl. Enclose Proof) ** Attach copies of audited annual accounts for the past 3 years	
14	Paid up capital of the Company	
15	Tender Fees	
16	EMD	
17	NSIC Regn. No. (if applicable) & its valid period	
18	Name of the Banker, Branch Name, A/c No. and IFS Code (for e-payment purpose)	
19	PAN Number (Pl. Enclose Proof)	
20	GST Number (Pl. Enclose Proof)	



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21	Number of employees	
22	Number of such Projects Work Has Been Conducted	
23	Persons authorized by the company to execute documents on its behalf, with ICSI (Pl. Enclose Proof)	
24	SPOC (Single point of Contact) Name	
25	SPOC contact detail (Mobile, E-mail)	

- **Details of the projects executed:** Please include details of three similar nature projects executed in last five years ended as on 31st March, 2025:

(Please provide soft copy in Excel format apart from the signed hard copy)

Sl. No.	Project	Project executed for (Name of the organization with address, phone numbers etc.)	Nature of work in brief	Location of the work	Actual value of the Project	Duration	Status (on going / Completed)

- **Details of Key personnel of Bidding firm:**

(Please provide soft copy in Excel format apart from the signed hard copy)

Sl. No.	Name	Qualifications	Experience	Particulars of Project done	Employed in your vendor since	Any other details

- **Client Reference:** To be a qualified proposer, the bidder must include three (3) references in its proposal response. References will be contacted - please verify information before submitting. Information to be included in the reference is:

(Please provide soft copy in Excel format apart from the signed hard copy)

Particular	Response
Organization Name	
Address	
Type of Business	
Contact Person	
Telephone and Fax #s	
Dates of Installation	
Description of system	



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I/We hereby declare and affirm that I/we have read and understood the terms and conditions of this tender/quotation/NIT as stipulated in the tender notice No. _____. Accordingly, I/we accept the terms and conditions and hereby offer the rates for “_____” (name of the work or supply)” as per Financial Bid (Part ‘C’).

Signature _____
(Authorized signatory of the bidder)

Name of the bidder _____

Date _____

Official seal of bidder _____

- **NOTE: Please submit all supporting documents (self-attested photocopy) wherever applicable in support of the information furnished above with seal and signature of the bidder’s authorized representative.**



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(Annexure B)

HQ: ICSI HOUSE, 22, INSTITUTIONAL AREA, LODI ROAD NEW DELHI-110003
ICSI NOIDA OFFICE: ICSI HOUSE, C-36, SECTOR-62, NOIDA-201309 (UP)

ICSI/IT/ BPR/2025-26/127

February 16,2026

OPEN TENDER-TWO BIDS SYSTEM

Sub: RFP For “Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)”.

Form II: Eligibility Criteria Details.

Sl. No.	Criteria	Documents/Information to be provided in the submitted Bid
1.	<p>The bidder shall be a company having their registered office in India and must be:</p> <p>I. A company registered under the Indian Companies Act, 2013</p> <p>OR</p> <p>II. A partnership firm registered under the Limited Liability Partnerships (LLP) Act, 2008</p> <p>The bidder has to ensure that the Objects Clause of its MOA must have mention of the subject services explicitly.</p> <p>The following document submissions to be made mandatory to ensure that:</p> <ul style="list-style-type: none">• Declaration - None of the Director/Designated Partner is disqualified.• Declaration- All compliances of Companies Act, 2013/ partnership firm registered under the Limited Liability Partnerships (LLP) Act, 2008 has been duly filed.• KYC of all Directors/Designated Partners is required to be submitted.• Declaration that None of the Directors/Designated Partners are Disqualified/ Blacklisted.• Complete Office ID containing Photograph of all the Directors /Designated Partners• KYC of the authorised Person.	<p>Please attach self-attested copy of Certificate of Incorporation or MOA or AOA</p>
2.	<p>Board Resolution certified by the CEO/MD or Company Secretary of the bidder or Power of Attorney issued by the CEO/MD of the bidder in favor of the Authorized Signatory of the bid on behalf of the Bidder or Authorization of signatory for the purpose of this bid</p>	<p>Please attach Original Power of Attorney / certified copy of the board Resolution / Letter of Authorization</p>
3.	<p>The bidder must have a minimum of 10 years of experience in e-Governance and digital platform software development, as well as in</p>	<p>Please provide copy of engagement letter/work order/completion</p>



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	implementing Business Process Reengineering (BPR) initiatives, and must have provided similar services to Central Government Ministries/ Departments, Public Sector Undertakings/ Universities/ Autonomous Institutions, Statutory Bodies/ / Public Sector Banks (PSBs)/ / Multinational Companies.	certificate highlighting the scope of work.
4.	The bidder must have a minimum Average of Annual Turnover of not less than Rs. 1000 Cr. during the previous three financial years (2022-2023, 2023-2024, 2024-2025) in technical services.	Please Attach Copies of duly audited balance sheets and profit and loss Account along with Auditors Report duly certified by CA for FY (2022-2023, 2023-2024, 2024-2025).
5.	The bidder should have on its pay roll minimum 5000 technical employees with in India.	Please attach the declaration on letter head.
6.	Submission of Tender Fee	Please attach receipt / DD of the tender fee.
7.	Submission of EMD or valid NSIC certificate/document.	Please attach copy of EMD receipt/DD or valid NSIC certificate/document.
8.	PAN (Please attach self-attested photocopy of the documentary proof to be submitted)	Please attach self-attested photocopy of PAN
9.	GSTIN Code (Please attach self-attested photocopy)	Please attach self-attested photocopy of GSTIN Certificate
10.	Bidders should have support office operational in the Delhi-NCR.	Please attach copy of rent agreement/telephone bill /electricity bill or similar document.
11.	The bidder should have been assessed for a Capability Maturity Model Integration (CMMI) Level 5. The assessment should be a valid certificate.	Please attach valid self-attested photocopy of Certificate
12.	The bidder should have the following valid certifications: <ul style="list-style-type: none">• ISO 27001:2022 (Information Security)• ISO 22301:2019 (Business Continuity)	Please attach valid self-attested photocopy of Certificates
13.	<p>The Bidder must have successfully completed/ executed at least Three (3) large scale systems comprising similar services in India (preferably in Delhi /NCR) in last five years for Government / PSU /Statuary / Institutions of Higher Education / Universities / Large Corporates of value more than Rs. 25 Cr each.</p> <p>The following are desirable attributes as evidenced in one or more engagements executed by the bidders in the last five years:</p> <ul style="list-style-type: none">• Such engagement must involve a multi-service system in the Government department / education sector and/or a	<p>1. Engagement letter (EL)/Work order with order value detailing the scope. OR</p> <p>2. Agreement copy defining the scope & value. OR</p> <p>3. Proof of Certificate - Completion certificate (Implementation / GO-Live / Support Completion) with date.</p>

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[Signature]



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	<p>geographically distributed enterprise environment that supports a scalable, service-oriented solution.</p> <ul style="list-style-type: none">• Experience in geographically distributed enterprise environmental applications would be an added advantage.• Members, where applicable, should have demonstrable experience in key requirements of the ICSI such as Process modelling, Business processes re-engineering, work flow automation, training needs analysis, strategic technology consulting (such as in IT infrastructure, solution architecture, application software, assessment and evaluation of platforms, etc.), definition of services and design of SLA's, workflow automation, Program/project management, contracting and change management. In support of these aspects, the bidder can specify up to a maximum of three customer engagements to demonstrate their experience. In other words, the Bidder, can demonstrate their experience and capabilities in the aforesaid areas in relation to a maximum of three projects.• Systems integration experience• Experience in conceptualization and design of e-governance / enterprise applications• Business Modelling and financial structuring• SLA monitoring• Bid Process Management support• Such engagement must involve a multi-service system in the Government department / education sector/ large corporates/ PSUs/ PSBs and/or a geographically distributed enterprise environment that supports a scalable, service-oriented solution.• Bidder should have been associated in the capacity of Principal Consultant or should have been responsible for Program Management in such engagements	
14.	<p>The Bidder shall have executed a platform license agreement valued at INR 30 Crore or above within the last three (3) financial years, demonstrating a pan-India credential in license resale and management.</p>	<p>1. Copy of the Engagement Letter (EL)/Work Order indicating the order value and scope of services. OR</p>



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		2. Copy of the Agreement specifying the terms and conditions of license resale.
15.	<p>OEMs (if any) for the proposed solution whose products have been offered in the bid shall have local Technical Assistance Centre (TAC) based in India for offering post sale & implementation support.</p> <p>Proposed Solution OEMs (if any) should have their own/local office in India manned with their own product support professionals. Documentary proof for the same should be provided by the proposed Solution OEMs and submitted by the bidder. ICSI may decide to visit the TAC support centres during the evaluation of the bids.</p>	<p>The proposed Solution OEM should submit documentary evidence through self-attested certificate covering Address and contact details of TAC Centres along with number of professionals shall be submitted along with the bid.</p> <p>Link of online support portal of OEM should also be mentioned.</p>
16.	Proposed Solution OEM (if any) should not have been Debarred and / or blacklisted by any organizations of Govt. of India / State Govt. / PSUs at time of submission of bid.	Self-Declaration/Certification by the authorized signatory of the bidder
17.	The proposed solution OEM (if any) product must ensure support availability in India for a minimum of 10 years , commencing from the last date of bid submission.	Self-certified documented roadmap of solution OEM product
18.	<p>Bidder should be either OEM (if any) of proposed Solution or its Authorized Service Provider (ASP) with the experience required in this RFP.</p> <p>The bidder should have a valid Authorization letter Certificate (MAF) issued by OEM (if any) of proposed solution to Authorized Partners for participating in this tender.</p>	<p>Attach authorization letter [Manufacturer's Authorization Form (MAF)] from OEM for the products & services provided from the principal manufacturer to the bidder for this RFP</p> <p>The certificate should be valid as on the date of award of contract.</p>
19.	Proposed solution OEM (if any) should have at least 5 authorized implementation and support partners in India, who are CMMI level 5 certified.	Supporting documents with period of validity
20.	Proposed Solution OEM (if any) should certify that they comply with the functional requirement specifications (FRS) mentioned in this Tender document.	Self-declaration approved by proposed Solution OEM
21.	The Cloud Service Provider (CSP) should be a registered firm or a company in India and the CSP should be MEITY (Ministry of Electronics and Information Technology (MeitY), Govt. Of India) empanelled and offer all services from India only as per guidelines of MEITY.	<p>Certificate of registration and Certificate of Incorporation to be enclosed.</p> <p>And</p>



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	OR The cloud-based solution should be hosted in India and align with ISO 27001, ISO 27017, ISO 27018 and SOC2 certifications and comply with data residency regulations within the boundaries of India.	Copy of valid STQC/MEITY empanelment certificate and undertaking for jurisdiction by CSP And copy of Work Order issued / MOU / Contract signed with cloud Service Provider / cloud Data centre.
22.	Bidder should not have been blacklisted by any Firm/Organization/School/Board/University/Institution or any Government organization and no litigation is pending in the court of law against the bidder. Bidder also should not be under any legal action or not declared ineligible to participate for unsatisfactory past performance by the Government of India for indulging in corrupt, fraudulent, coercive, undesirable or restrictive practices or any other unlawful or unethical business practices with any Central/State Government Ministry/Department/ PSU/ Statutory Body / Government Company in last 5 years. The Bidder also must not have been declared bankrupt/insolvent or should not have filed for bankruptcy/insolvency in the past five years or in the process of being declared bankrupt / insolvent before any designated authority.	Please attach declaration from Authorized Signatory on the Bidder's Business Letter Head.
23.	The Bidder, who has refused to continue or sign the agreement in past for any contract awarded by ICSI, will not be eligible to participate in this tender. The Bidder who was awarded any contract in the past by the Institute but terminated during the contract period due to unsatisfactory performance will not be eligible /considered to participate in this tender. The bidder who was awarded any contract related to the students or members domain and failed to meet the prescribed delivery timelines, will not be eligible to participate in this tender.	Please attach declaration from Authorized Signatory on the Bidder's Business Letter Head.

All the required documents are required to be submitted along with the RFP. Non-submission of any documents or submission of incomplete, misleading or false information may render the bidder liable for rejection or cancellation of their bid.

Signature _____
(Authorized signatory of the bidder)

Name of the bidder _____

Official seal of bidder _____

Date _____



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(Annexure C)

HQ: ICSI HOUSE, 22, INSTITUTIONAL AREA, LODI ROAD NEW DELHI-110003
ICSI NOIDA OFFICE: ICSI HOUSE, C-36, SECTOR-62, NOIDA-201309 (UP)

ICSI/IT/ BPR/2025-26/127

February 16,2026

OPEN TENDER-TWO BIDS SYSTEM

Form III: RFP For “Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)”.

To
The Secretary
Institute of Company Secretaries of India (ICSI)
ICSI House, C – 36, Sector 62, Noida-201309

Sub: RFP For “Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)”.

Sir,

This is with reference to the **RFP For “Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)”**. due on **March 10, 2026**. We are interested to participate in the **RFP For “Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)”** dated **February 16,2026**. We declare that:

- i) We have read and understood the terms and conditions given in the tender/ quotation Document;
- ii) We are eligible for award of the contract as per the qualification criteria mentioned in the tender/ quotation Document;
- iii) We accept and agree to all the terms and conditions of the tender/ quotation;
- iv) We shall comply with all the terms and conditions of the tender/ quotation;
- v) All the information / documents provided in this bid are true to the best of our knowledge and belief. If at any stage, the information / documents are found to be false, misleading or incorrect then this Bid / Purchase Order shall be cancelled at our cost and risk and we shall indemnify the Institute (ICSI) for the loss caused due to the cancellation and we shall be liable for penal / legal action including black listing by ICSI.
- vi) We understand that ICSI reserves the right to cancel the tender / quotation at any stage or cancel / reject any one or more bid without incurring any liability.
- vii) The duly signed copies of all the tender pages are attached herewith.

(Signature of the Bidder)

Printed Name

Designation

Official seal/ stamp

Date:



(Annexure D)

HQ: ICSI HOUSE, 22, INSTITUTIONAL AREA, LODI ROAD NEW DELHI-110003
ICSI NOIDA OFFICE: ICSI HOUSE, C-36, SECTOR-62, NOIDA-201309 (UP)

ICSI/IT/ BPR/2025-26/127

February 16,2026

OPEN TENDER-TWO BIDS SYSTEM

Sub: RFP For “Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)”.

Technical Evaluation Matrix (Valid supporting documents must be submitted)

S.No.	Criteria	Level	Score	Bidder's response (Please tick the applicable option / grade yourself)	Max Score
1	No. of years the bidder is in operation	>=10 years < 20 years	3		5
		>=20years	5		
2	Average Annual Turnover of three Financial Years (2022-2023, 2023-2024, 2024-2025).	>=INR 1000 Cr and <INR 2000 Cr.	2		10
		>=INR 2000 Cr and < INR 3000 Cr.	4		
		>=INR 3000 Cr and < INR 4000 Cr.	6		
		>=INR 4000 Cr and < INR 5000 Cr.	8		
		>=INR 5000 Cr	10		
3	Technical Team Size (IT professional with minimum qualification of B.E/MCA or higher having 2 years of experience)	>=5000 and < 10000	4		8
		>=10000 and < 15000	6		
		>= 15000	8		
4	Certification(s), attach a copy of valid certification	AI Management Systems (AIMS) ISO 42001:2023	2		2
		ISO 27701:2019 (Data privacy)	2		2
		SOC2 Certification	2		2
		ISO 22301:2019 (Business Continuity) and CMMI Level 5	2		2



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		Authorized Transition Partner with CMMI Institute	2		2
5	The Bidder must have successfully completed/ executed at least Three (3) large scale systems comprising similar services in India (preferably in Delhi /NCR) in last five years for Government / PSU /Statuary / Institutions of Higher Education / Universities / Large Corporates of value more than Rs. 25 Cr each.	=3 projects	3		7
		>3 projects and <=5	5		
		>5 projects	7		
6	Presentation of a comprehensive understanding of the Business Process Reengineering (BPR) requirements, along with the proposed approach and methodology in response to the Request for Proposal (RFP)	<ul style="list-style-type: none">• Understanding of Scope of work & Objectives• Approach and Methodology• Suitable platform proposed• Solution Architecture & Design• Use of Emerging Technologies• Complete Automated solution• Delivery Timelines			50
7	Clients (similar projects) interactions / visits / feedback	Feedback from existing clients	4		4
	Platform License resale and management deal of INR 30 Cr or more in a single project within India geography		3		3
8	Number of years of Experience in Key areas relevant to Digital Transformation and e-governance implementation	>=5 and <10	1		3
		>=10	3		
	Total Marks				100

Minimum Qualifying Score: The minimum qualifying score in the technical evaluation is 70 (out of 100). Bidders scoring less than 70 will not be considered for further evaluation. **ICSI reserves its right to shortlist/restrict number of Bidders for further evaluation based on the score obtained by the bidders as per above technical evaluation matrix.**

Place:

SIGNATURE OF THE BIDDER

Date:

NAME & DESIGNATION SEAL OF ORGANISATION



(Annexure E)

HQ: ICSI HOUSE, 22, INSTITUTIONAL AREA, LODI ROAD NEW DELHI-110003
ICSI NOIDA OFFICE: ICSI HOUSE, C-36, SECTOR-62, NOIDA-201309 (UP)

ICSI/IT/ BPR/2025-26/127

February 16,2026

OPEN TENDER-TWO BIDS SYSTEM

Sub: RFP For "Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)".

PART 'C' (FINANCIAL BID)

The bidder has to quote rate inclusive of all i.e., cost of manpower, tools and tackles, consumables, enabling services or any other arrangement required to be available for providing effective service as per terms of the contract, statutory benefits to its manpower and statutory taxes and duties except GST which is to be shown separately as per the financial bid format.

The BOQ (Bill of Quantities) Activities shall be as per below format: The Bidder shall submit financial bid for any one platform.

Name of Platform: Microsoft/ Zoho/ Similar platform

S. No.	Activity	Description	Name of the Platform	BASIC PRICE (in Rs.)	GST (in Rs.)	Total Amount (in Rs.)
1.	Development and Implementation of Uniform Solution (with one year warranty period)	<ul style="list-style-type: none"> • Process Study • Requirement Gathering & Analysis • Business Process Reengineering • Documentation • Design & Development of Solution • Testing & Quality Assurance • Implementation & Deployment • Training & Handholding to users Management 				
2.	Cloud Hosting Cost (including managed services)	<ul style="list-style-type: none"> • During implementation • During Warranty Period 				
3.	Annual License Cost per User	Active Students 1,90,000 (approx.) Members 79000 (approx.)				



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		Permanent Employees 400 (approx.)				
		Contractual Employees 200 (approx.)				
4.	Annual License Cost per user (in proportion to the cost quoted above in Point no. 3)	Cost for 01 user				
5.	Cost of Bulk Email (per email) delivered basis	Tentative Quantity (Per year) - 1 lakh				
6.	Rate per SMS delivered basis	(Includes text/push/pull/Unicod e messages) for Transactional and service (I and E) SMS) Tentative Quantity (Per year) - 1 lakh				
		Rate per SMS (Promotional Messages) Tentative Quantity (Per year) - 1 lakh				
7.	Category Wise WhatsApp conversations prices in India (per WhatsApp) delivered basis	Utility Category- Tentative Quantity (Per year) - 1 lakh				
		Marketing Category- Tentative Quantity (Per year) - 1 lakh				
		Authentication Category- Tentative Quantity (Per year) - 1 lakh				
		Service Category- Tentative Quantity (Per year) - 1 lakh				
8.	Manpower per day cost to cater any additional requirements beyond the scope of Work within Warranty / AMC period	Preventive/ Corrective maintenance, Support, upgrades and reporting				
9.	Annual Maintenance (Cloud Hosting +					

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[Signature]



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	License Cost) for Year One					
10.	Annual Maintenance (Cloud Hosting + License Cost) for Year Two					
11.	Annual Maintenance (Cloud Hosting + License Cost) for Year Three					
12.	Annual Maintenance (Cloud Hosting + License Cost) for Year Four					
13.	Annual Maintenance (Cloud Hosting + License Cost) for Year Five					
	Sub-Total					

Note: The Institute may issue Work Order for all the above-mentioned components in the table OR part of it as per its requirements at no additional cost. In such scenario, the payment for the part(s) for which Work Order is issued will be paid to the vendor.

- The breakup of costing as above is only to ensure that during the currency of the contract the services of the vendor may be taken for the respective head at a predefined costing at the discretion of the ICSI.
- The tentative quantities are provided exclusively for commercial bid evaluation. The final work order shall be issued on a per-unit basis, reflecting the actual cost, which may vary from the estimated values.
- Bidders must ensure DLT compliance, TRAI regulations, and message delivery SLAs (e.g., OTP within 15 seconds).
- WhatsApp pricing should reflect Meta's BSP/TSP guidelines and include conversation-based billing.
- The Bidder is advised to understand the scope of work in detail from the ICSI IT team before committing the timeline and submission of the bid.
- The decision of ICSI in selecting the platform and awarding the work order shall be final and binding.
- Bidders must ensure that their BOQ commercial submission is complete, transparent, and aligned with the technical specifications of the chosen platform.



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- h) Any deviation, conditional pricing, or incomplete BOQ submission may lead to disqualification.
- i) ICSI retains the right to reject any or all bids without assigning reasons.

Place:

SIGNATURE OF THE BIDDER

Date:

NAME & DESIGNATION SEAL OF ORGANISATION

Antil



(Annexure F)

Proposed Service Level Agreement for Design, Development, Delivery, Implementation and Maintenance of a Single Sign-on Integrated Software System for Students, Members, Employees and other Stakeholders through Business Process Reengineering (BPR)

This Agreement dated ----- is made by and between a company incorporated under the Companies Act 1956, with its registered office located at ----- and with its corporate office located at -----

represented by ----- authorized
vide Board Resolution dated ----- (hereinafter appropriately referred
to as "**Vendor**" which term shall include its successors and permitted assigns), of the **One Part**
And

The Institute of Company Secretaries of India, a Statutory body constituted under the Company Secretaries Act, 1980 having its head office at ICSI House, C - 36, Sector - 62, Noida, Uttar Pradesh - 201309 represented by -----

----- (hereinafter
referred to as "**ICSI**") which term shall include in its successors and permitted assigns of the
OTHER PART

WHEREAS:

Vendor is willing to provide **ICSI** with the Services for Design, Development and Maintenance of Software Application in accordance with the terms and conditions of this Agreement;

NOW THEREFORE, in consideration of the mutual promises set forth below, and in the Attachments hereto which form an integral part of this Agreement, the Parties hereby agree to the following:

1. SERVICES TO BE PROVIDED

Bidder shall provide services of development and maintenance in accordance with the specifications set forth in this agreement and the RFP hereto:

Provide development and maintenance and coordination services for the Software Application and related work Information Technology Infrastructure (including application software, training, hand holding and data preparation including preventive maintenance benchmarking and generating reports as mentioned in the RFP).

2. The whole work included in the RFP shall be executed by the Bidder and the Bidder shall not directly or indirectly transfer assign or sublet the contract / work or any part thereof or interest therein without the written consent of ICSI.
3. In case any work for which there is no specification in the RFP, such work shall be carried out in accordance with the directions of the ICSI without any extra cost to the Institute.
4. There may be 20% variation in the scope of work which would be mutually discussed.



5. SECURITY DEPOSIT

The successful Bidder shall be required to give a security deposit for faithful performance of the RFP.

The successful bidder has to submit the security deposit /performance guarantee from nationalised bank of equivalent amount of 10% of the contract value on awarding the contract within 15 days of issue of order but before execution of the agreement, to cover any loss or damage caused to or suffered by the Institute due to acts of commission and omission by the successful bidder or any failure on the part of the successful bidder in fulfilment of terms and conditions of the contract and conditions contained in the agreement. The Bank Guarantee shall have to remain valid for the entire duration of the Contract plus three months beyond the completion of contract period. The successful bidder shall not be entitled to any claim or receive any interest on the amount of performance guarantee. The EMD of the successful bidder will be refunded after submission of the performance Guarantee/Security Deposit.

The successful bidder having valid registration with NSIC on the date of submission of tender, are also required to submit requisite security deposit / performance guarantee.

Forfeiture of Security Deposit and Invoking of Bank Guarantee

ICSI shall have the right to invoke the Bank Guarantee and to forfeit the security deposit if the vendor contravene or breach any of the terms and conditions of the Agreement or if the vendor withdraws or amends, impairs or derogates from Agreement or fails to execute the work as per the Agreement or fails to deliver the satisfactory performance during the period of Agreement.

ICSI shall also have the right to invoke the Bank Guarantee and to forfeit the security deposit and to adjust the damage or loss caused to the ICSI due to the negligence, carelessness, inefficiency, fraud, mischief and misappropriation or any other type of misconduct of the vendor or its staff / employee / agent / representative.

Whenever under Agreement any sum of money is recoverable from and payable by the vendor, the ICSI shall have right to recover such sum by appropriating in part or in whole from the security deposit / bank guarantee of the vendor. In the event of the security deposit / bank guarantee being insufficient, the balance or the total sum recoverable, as may be, shall be deducted from any sum due to the vendor or which at any time thereafter may become due to the vendor under this or any other Agreement with the ICSI. If this sum is not sufficient to cover the full amount recoverable, the vendor shall pay the ICSI on demand the remaining amount.

6. Extension of Existing Contract:

On expiry of initial contract period (Two (2) Year Development + One (1) Year Warranty + Five (5) Year AMC), the ICSI reserves the right to extend / renew at the sole discretion of ICSI for a further period of maximum of Five (5) Years on yearly basis on mutually agreed terms and conditions between the ICSI and the Vendor in writing. Vendor shall not have right to claim renewal. Decision of the ICSI in regard shall be final. Vendor shall have no right or claim for the extension of the contract in any circumstances and decision of the ICSI shall be final and absolute.



7. TIME - ESSENCE OF CONTRACT

The time allowed for completing the work under RFP / SLA and handing over the same shall be of the essence of the Contract and shall be strictly observed by the **Bidder**. The Work shall proceed with due diligence until Final Completion. ICSI would extend all required support and inputs to help the **Bidder** to meet the project timelines. For delays which are directly attributable to the sole actions and / or scope of work of the Bidder, the Bidder shall be liable to pay penalty and/or liquidated damages as per the provisions of this Agreement.

8. TERMINATION

ICSI may terminate this Agreement by giving a three (3) months' notice in writing to the other party for termination of agreement. Further, the Vendor can terminate the Agreement only on failure of the ICSI in performance of its obligation under this Agreement and the issue has not been addressed by ICSI upon communication of such failure.

The ICSI without prejudice to any other remedy, reserves the right to terminate the agreement in whole or in part by giving thirty (30) days' notice in writing in case Vendor fails to discharge its obligation under this agreement without sufficient grounds or found guilty for breach of condition(s) of the agreement, negligence, carelessness, inefficiency, fraud, mischief and misappropriation or any other type of misconduct by Vendor or by its staff or agent.

Any pending or unresolved operational issues, performance, unpaid fees and any other remedies shall continue by the Vendor during the period of termination notice and the same must be satisfied before this agreement is terminated. The ICSI may also put in place any other agency for carrying out the remaining work and expenditure incurred on same shall be recovered from the Vendor.

The Vendor shall have no claim to any payment or compensation whatsoever on account of any profit or advantage, which would have been derived from the performance of this Agreement in full, but which he did not derive in consequences of the full performance of this Agreement not having been carried out, nor shall he have any claim for compensation / damage for the loss suffered by him by reason of termination of Agreement by the ICSI. No claim for interest will be entertained by ICSI with respect to any moneys or balances, which may be in its hands owing to a dispute between itself and the Vendor.

Vendor must return/hand over the data/Code of the complete project without any additional cost to the ICSI in case of Termination, End of the Contract.

- 9. BLACKLISTING:** The ICSI without prejudice to any other remedy and rights, reserves the right to blacklist the Vendor for a suitable period in case he fails to honour his bid / Work Order / Service Level Agreement (SLA) or found guilty for breach / violation / contravention of terms(s) and condition(s) of the RFP / Work Order / Service Level Agreement (SLA) or negligence, carelessness, inefficiency, fraud, mischief, misappropriation or any other type of misconduct by Vendor or by its staff, agent, employee or officer etc. or by any other person directly or indirectly employed by him.



10. **Whenever** under this RFP / Work Order / Service Level Agreement (SLA), any sum of money is recoverable from and payable by the **Vendor**, the ICSI shall be entitled to recover such sum by appropriating in part or in whole from the security deposit / bank guarantee / earnest money deposit of the **Vendor**. In the event of the security deposit / bank guarantee / earnest money deposit being insufficient, the balance or the total sum recoverable, as may be, shall be deducted from any sum due to the **Vendor** or which at any time thereafter may become due to the **Vendor** under this or any other RFP / contract with the ICSI. If this sum is not sufficient to cover the full amount recoverable, the **Vendor** shall pay the ICSI on demand the remaining balance.
11. **The personnel(s)** employed / hired / engaged (permanent / regular / casual / contractual / temporarily / daily wager or whatever be the status / name) by the **Vendor** for the execution of work as provided under this RFP, shall not be employee / officer of the ICSI for any purpose. None of such person of the **Vendor** shall have any right to claim anything against the ICSI.

12. CONSIDERATION

Payment Plan: Payment will be structured on a milestone basis, with percentages calculated against the overall project development and implementation cost.

S.No	Project Milestones	Payment Schedule
1.	Project Inception	NIL
2.	Requirement Study, Documentation & User Sign Off	5%
3.	Solution Design, Documentation & User Sign Off	5%
4.	UAT server	NIL
5.	Production Movement of Complete Student life cycle Modules along with Codebase*. (Go Live)	10%
6.	Production Movement of Complete Membership life cycle Modules along with Codebase*. (Go Live)	10%
7.	Production Movement of ERP section along with Codebase*. (Go Live)	10%
8.	Production Movement of e-Office Automation along with Codebase*. (Go Live)	5%
9.	Production Movement of Complete website along with Codebase*. (Go Live)	5%
10.	Production Movement of Examination Modules along with Codebase*. (Go Live)	10%
11.	Production Movement of all other modules	5%
12.	Approval of Training Manuals, Systems, Administration Manuals, User manuals, Installation, Manuals, Operational Manuals, Maintenance Manuals	5%
13.	Admin, technical and user training	5%
14.	Approval of Final Roll out, submission of complete source code to ICSI and walkthrough of the code base and Database.	5%
15.	Post Implementation Support for one year	20%

* Wherever applicable will be handed over to ICSI.



Note: Licenses will be subscribed on an annual basis, with quarterly billing aligned to the minimum commitment for the upcoming year. Payments shall be made upon receipt of the invoice, with the first invoice issued during UAT and prior to the transition into production.

Expected timelines for deliverables for implementation of the project refer to the table mentioned in **Timelines for deliverables**.

Payment of Taxes: The Vendor shall be responsible for and shall pay all taxes, duties, assessments or other charges of any kind or nature whatsoever levied by any government or governmental body on or in connection with the Services including without limitation all statutory levies, taxes, fee, duties, rate, charges, surcharges etc. and any other tax ("taxes") levied on service provided by the Vendor. ICSI may withhold from payments due to the Vendor any amounts required with respect to the aforementioned taxes and to remit the same with the relevant authorities, in case of failure on the part of the Vendor.

12. ICSI RESPONSIBILITIES: To facilitate **Vendor's** provision of Equipment and Services, **ICSI** agrees to perform the following obligations:

- 12.1 Access: ICSI shall grant access at all times to relevant stakeholders, source code of existing applications, test & live data, documents (design, manuals, SRS etc.), other relevant project artifacts, equipment, related sites, office areas and other facilities to Vendor and its authorized representatives, subject to ICSI's reasonable security restrictions. ICSI shall arrange for permission for access to offices of third parties for purposes of carrying out the work to be performed for use of existing web server in co-located location.
- 12.2 Project Contacts: ICSI designates Joint Director, Information Technology, ICSI as the responsible person representing ICSI's management for the Project. One nodal officer of each department shall represent the departments in all aspects of the provision of contents.

13. VENDOR RESPONSIBILITIES

13.1 Services

The Vendor shall deploy the development team, as specified in the RFP, comprising professionals experienced in the relevant technologies for software application development. During the development phase at the central location in Noida, the designated representative will be responsible for overall coordination, with support from other teams of the Vendor.

13.2 Maintenance Service

- a) Vendor shall keep portal operating for all days on behalf of the Institute. The Vendor personnel contacts, telephone numbers, and other procedures of fault reports like call escalation processes, databases with historical information will be made available by Vendor to the ICSI within 7 days of the acceptance of the site by ICSI. In case of default in any or all of the mentioned conditions, the penalty of Rs.5000/- per day or part of the day will be levied on Vendor by ICSI.
- b) In case, there is any breach in the security from external threats due to any vulnerability of the software application developed and delivered by the Vendor, including Denial of Service Attacks (DoS) / Distributed Denial of Service (DDoS)



attacks malware, the penal provisions will be Rs. 50,000/- (Rupees Fifty Thousand Only) (except for DoS/DDoS attack) and in addition Rs. 5,000 per two hours for all cases including DoS and DDoS, till the time remedial action is taken by the bidder. Vendor will support the software solution delivered for the maintenance period as per the terms and conditions of the RFP. Manpower mentioned in the RFP would be deployed at ICSI NOIDA office during the complete maintenance period.

- c) BIDDER is required to perform a detailed assessment of Cloud based Software solution requirements mentioned in this TENDER, the number of ICSI Offices location, users, transaction volumes and assess the infrastructure requirements for operationalization of the proposed Solution on Cloud and to provide the services in conformance with the RFP. BIDDER shall ensure that the proposed infrastructure supports the necessary performance requirements.
- d) The total number of indicative new users is estimated to be approximately 60,000 (students) per year. During the contract period, the bidder shall be responsible for provisioning and maintaining adequate IT infrastructure to support these new users and all associated transactions, strictly in accordance with the rates quoted in the bid, and without any additional financial implication to ICSI.
- e) BIDDER is required to perform necessary sizing of IT infrastructure on cloud for implementation of Solution and to maintain the performance of the systems in line with the SLAs provided in this TENDER. However, the system proposed by bidders shall ensure scalability and performance requirements.
- f) The proposed solution should have appropriate servers in high availability mode with security features such as firewall, IPS, SSL, Anti malware, encryption etc. to meet the service levels defined in this TENDER. The configuration of IT infrastructure should be commensurate with the ICSI offices and users mentioned in this TENDER
- g) During the entire project period, if the performance of the system is impacted due to infrastructure limitations on the cloud arising from growth in transaction volumes or increase in the number of users, the bidder shall be responsible for updating, upgrading, and augmenting the cloud infrastructure. Such augmentation may include, but is not limited to, provisioning of additional servers, storage capacity, bandwidth, or any other resources necessary to ensure seamless system performance.
- h) The Successful Bidder is required to provide, install and commission all the software up gradations/ enhancements from time to time, during the entire contract period free of cost to the ICSI.
- i) Any upgradation, enhancement, or update in the proposed solution—whether arising from product lifecycle improvements, vendor policies, or industry best practices—shall be made available to ICSI in a timely manner and at no additional cost during the contract period.
- j) The Successful bidder is required to upgrade OS, DB, any other Software provided by them for providing cloud environment and hosting
- k) Vendor will be responsible for the renewal of supplied Software licenses & services for continuous product update & support





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- l) Vendor will be responsible for the renewal of Annual Technical Support (ATS) of all the component /software/accessories used for secure hosting and server configuration on Cloud, without any extra cost to ICSI
- m) Vendor will be wholly responsible for the compliance related to the provided software licenses and services to ICSI to meet the scope of work of this RFP
- n) All the incidental expenses for making systems operational will be the sole responsibility of the selected vendor without any additional cost.
- o) If the application stops complying with the scope of work, and terms & conditions mentioned in this RFP, the bidder will upgrade all its service and infrastructure required for successful compliance in accordance with this RFP without charging any extra amount from ICSI.



13.3 Corrective Maintenance

In accordance with the terms of this Agreement, the Vendor shall provide comprehensive Annual Maintenance Services (AMS) for all applications delivered and implemented under this project for a period of 5 years after one year warranty period completion. The scope of AMC encompasses proactive monitoring, preventive and corrective maintenance, performance optimization, security management, and continuous support to ensure uninterrupted, efficient, and secure operation of all critical applications and their integrations across ICSI's digital ecosystem. Vendor shall maintain delivered software application using the procedures of corrective maintenance as required:

(viii) **Application Monitoring**

- 24x7 monitoring of all deployed applications.
- Coverage to include application uptime (minimum 99.9%), response times, transaction failures, integration points, and user access patterns.
- Automated alerting and escalation for anomalies, downtime, or performance degradation.

(ix) **Security Management**

- Continuous monitoring for vulnerabilities, unauthorized access attempts, and potential data breaches.
- Implementation of security controls, periodic security audits, and compliance with applicable data protection regulations (including DPDP Act, 2023) and any guidelines issued by the Government of India during the project tenure.
- Support for annual security audits and timely closure of audit findings.
- Submission of a valid Certificate of Security Audit Completion / VAPT Report (validity: 1 year).

(x) **Backup and Recovery**

- Regular backup of application data, configurations, and system states in line with the defined backup policy.
- Periodic testing of backup restoration and execution of disaster recovery drills to ensure business continuity.

(xi) **Reporting and Documentation**

- Monthly and quarterly reports covering application health, incidents, resolutions, performance metrics, and maintenance activities.
- Maintenance of updated documentation for all applications, integrations, and changes implemented during the AMC/AMS period.

(xii) **Change Management:**

- Controlled deployment of minor enhancements, configuration changes, and integration updates as per ICSI's change management process.
- Impact assessment and rollback planning for all changes.



(xiii) **User Support:**

- Helpdesk support during business hours (or as agreed) for issue logging, tracking, and resolution.
- Knowledge base and user guidance for common issues and FAQs.

(xiv) **Additional Provisions**

- System Reconfigurations:** The Vendor shall reconfigure the system/portal as and when new software version updates are released.
- Technological Updates:** Any new technological updates implemented by the bidder without prior approval of ICSI may be ratified during monthly reporting. Financial grants for such updates shall remain at the discretion of the Institute on an equitable basis.
- Mobile Application Support:**
 - Ensure compatibility with the latest versions of Android and iOS.
 - Update SDKs, APIs, and libraries to avoid compatibility issues.
- Performance Monitoring:** Continuous tracking of application speed, responsiveness, and uptime.
- Backend Optimization:** Optimization of backend services and databases for efficiency.
- UI/UX Updates:** Regular updates to UI/UX elements to maintain a modern and user-friendly interface.
- Integration Management:** Ensure smooth functioning of integrated services (e.g., payment gateways, maps, analytics).
- API Management:** Regular API version upgrades and compatibility checks.
- Bug Fixes:** Timely resolution of bugs in delivered features.
- Routine Maintenance:** Regular maintenance of servers, databases, and applications.
- Security Patching:** Application of security patches and updates on a regular basis.
- Scalability:** Implementation of scalers to handle peak loads as per requirements.
- System Health Reporting:** Regular reports on system health and maintenance activities.
- Infrastructure Review:** Periodic review of infrastructure performance with corrective actions as necessary.
- Normal/Standard/Routine Change Requests that don't warrant significant efforts (less than 80-man hours)
- Major Change Requests are defined as those involving new requirements outside the agreed scope, system design or architectural modifications, significant impacts on project timelines, or substantial redesigns.
- This will be initiated post the closure of hyper care period. This professional fee will be invoiced by us to you on quarterly basis at the beginning of every quarter.
- Infrastructure related maintenance activities will be conducted for 2 hours a week for ensuring optimum performance and stability
- For the applications/ portal /Apps/Solutions supplied by Vendor, the fault should be resolved addressed as per below matrix. In case of default in any or all of the mentioned conditions, a penalty of Rs. 5000/- per incident per day will be levied on Vendor.



Defect Severity	Defect Report / Acknowledgement	Temporary resolution or Workaround *	Permanent resolution*	SLA Adherence
Critical – Severe defect that renders application completely unavailable	2 hours (All Days)	24 hours	48 hours	100%
High – Major defect on the application's core Functionality however, Manual work around is available/in place.	2 hours (Business) 4 hours (Non Business)	24 hours	72 hours	95%
Medium – Defect on non-critical module or feature of the application. Manual work around may or not be in place	4 hours (All Days)	48 hours	96 hours	90%
Low – Cosmetic or UI related defect that does Not impact the functionality of the application or affected module	24 hours (Business only)	NA	Change Management Process	95%

* If there is a dependency on third party for resolution/analysis/deployment, their turnaround time will be added to this.

* Low – Cosmetic or UI related defect that does not impact the functionality of the application or affected module will be managed through Release Management Process.

13.4 Preventive Maintenance

Vendor shall perform preventive maintenance for the developed solution for all components provided and implemented by Vendor. The preventive Maintenance includes normal checks on a monthly basis to check the quality of the performance of the against benchmark test. The preventive maintenance means benchmarking and generating reports pertaining to satisfactory through put in the network once in a fortnight during the warranty period. In case of default of any or all of the mentioned conditions a penalty of Rs.5000/- per day or part of day will be levied on Vendor.

13.5 Service Calls

Vendor will configure the Web Servers / services such that the fault is communicated immediately to their firm/company and designated official of ICSI through SMS or / and E-mail (SMS and Email charges to be paid by ICSI). Vendor will record necessary action taken till the rectification of such fault and till due acknowledgment taken in writing from concerned representative of ICSI. Monthly MIS of all such faults to the action taken closing



date and time will also be provided by Vendor on the first working day of the next month by 11:00 AM. The replacement / addition / removal of manpower deputed at ICSI will be with the prior approval of ICSI. Confidentiality of the data and information/records of the ICSI will be maintained by the deputed staff of Vendor and in case of failure of maintaining the same, Vendor will be fully responsible. Vendor will be responsible for any act of omission or commission on the part of its employees.

14. FORCE MAJEURE

- i. For the purpose of this Article, Force "Majeure" means any cause, which is beyond the successful bidder control or that of the Institute, as the case may be, which both could not foresee or with a reasonable amount of diligence could not have foreseen, and which substantially affect the performance of the order, such as:-
 - War / hostilities
 - Riot or civil commotion
 - Earth Quake, Flood, Fire, Tempest, Epidemics, Pandemic, Lightning or other natural physical Disaster, Quarantine restricts and Freight embargoes
 - Restrictions imposed by the Government or other statutory bodies, which is beyond the successful bidder control or of the Institute, which prevent or delay the execution of the order either by the successful bidder or by the Institute.
- ii. If a Force Majeure situation arises, the successful bidder is required to promptly notify ICSI in writing of such condition and the cause thereof within a period of three (3) days from the date of happening of such an event requiring invocation of this force majeure article. Unless otherwise directed by the ICSI in writing, the successful bidder will continue to perform its obligations under this order as far as is reasonably practical and shall seek all reasonable alternative means for performances of this order.

15. CONFIDENTIALITY

- a. During the term of the Agreement and thereafter, any disclosing party's Confidential Information received by the receiving party, under and by virtue of the Agreement, shall be maintained in the strictest confidence and trust and shall not be disclosed to a third party without the prior written consent of the disclosing party, unless such information is required to be disclosed in pursuance of the order of a competent court, tribunal or other regulatory authority exercising valid jurisdiction, in which case the party required to make the disclosure shall promptly notify the other Party in writing of such disclosure. For purposes of this agreement "Confidential Information" means information that: (i) is sufficiently secret to derive economic value, actual or potential, from not being generally known to other persons who can obtain economic value from its disclosure or use; and / or (ii) is the subject of efforts that are reasonable under the circumstances to maintain its secrecy or confidentiality.
- b. Any software / hardware material, product specifications, financial information, documents covered under Agreement shall be confidential information and deemed to be in private domain and it shall not be made public or shared with any other party without the prior written consent of the ICSI.



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- c. Provided that upon the expiration, cancellation, or termination of Agreement, each party shall, upon the written request of the other party, return or destroy, to the satisfaction of the other Party, all Confidential Information, documents, manuals and other materials specified by the other Party.

Blacklisting: The ICSI may by notice in writing and after giving an opportunity of being heard, blacklist the Vendor for suitable period in case Vendor fails to discharge its obligation under Agreement without sufficient grounds or found guilty for breach of condition(s) of the Agreement, negligence, carelessness, inefficiency, fraud, mischief and misappropriation or any other type of misconduct by the Vendor or by its staff or agent.

Governing Law: The Agreement shall be interpreted in accordance with and governed by the laws of India.

16. INDEMNITY

- a. The Vendor shall be solely liable for and shall indemnify ICSI, its officers, servants, employees and agents against all liabilities, losses, claims and expenses of any nature whatsoever arising from any personal injury or illness (including death) of any nature whatsoever and any penalty, loss, damage or destruction to any property whether real or personal where such liability arises out of or in connection with the rendering of the Services under the Agreement whether under common law, under statute or otherwise. The Vendor further covenants and agrees to indemnify and keep at all times indemnified the ICSI against any loss or damage that the ICSI may sustain directly or indirectly as a result of the failure or negligence of the Vendor or its employees to faithfully carry out its obligations under Agreement and further to pay for all losses, damages, costs, charges and expenses which the ICSI may reasonably incur or suffer and to indemnify and keep indemnified the ICSI in all respects.
- b. The indemnifying party shall be granted immediate and complete control of any claim of indemnity and the indemnified party shall not prejudice the indemnifying party's defense of the claim.

The indemnified party shall give the indemnifying party all reasonable assistance at the expense of the indemnifying party on such claim of indemnity.

- 17. INDEPENDENT CONTRACTOR OR SUBCONTRACTOR:** The relationship of Vendor to ICSI under this Agreement shall be that of an independent contractor. The acts/performance and actions taken by either party in furtherance of their respective activities of operation shall not bind the other except to the extent provided under Agreement. The acts performed and action taken by either party that do not fall under the Agreement shall have binding effect on the other to the extent they are reduced to writing and the prior consent of the other party is obtained.

18. ADDITIONAL CONDITIONS

- 18.1 Complete Agreement:** This RFP and Agreement and all of its Attachments [and Annexures] constitute the complete Agreement between the Parties and replace any



written or oral Agreement or understanding with respect to the subject matter. Changes, amendments or interpretations of this Agreement shall be valid only if they are in writing and signed by both parties, except that each Party may make a change of domicile or change of the name of the person to whom notifications shall be sent. This notification shall be made through a written document to the other Party to this Agreement.

18.2 **Non-Exclusive Agreement:** The Agreement between the ICSI and the Vendor is a non-exclusive agreement. The ICSI shall be free to enter into any such agreement with any other Vendor during currency or the extended currency of Agreement.

18.3 **Representations and Warranties:** The Parties represent and warrant that they have relevant authority and permission under the applicable laws/ rules/ notifications or by virtue of the order/ instruction/ directive from the relevant authority to enter into this Agreement.

18.4 **Severability:** If any provision of the Agreement is held invalid, unenforceable or illegal for any reason, the Agreement will remain otherwise in full force apart from that provision(s) which shall be deemed deleted.

18.5 **Assignment & Sub-Letting:** Neither party shall assign or sub-let any of its rights and obligations hereunder whether in whole or in part without the prior written consent of the other. However, nothing in the foregoing shall be affected in the event of there being a merger, amalgamation or takeover of the business/ management of a party. In such an eventuality all the rights and obligations shall automatically be vested with the entity with which such party has been merged or is taken over.

18.6 **Alteration and Modification:** Any alteration or modification or waiver in connection with the Agreement will not be effective unless made in writing and signed by both the parties.

18.7 **Non-Waiver:** Failure to exercise by either party of any right under this Agreement in one or more instances shall not constitute a waiver of those rights in another instance. Such waiver by one Party of any of the rights established herein shall not be considered as a waiver of another right established herein.

18.8 **Notices & Notifications:** All notifications or notices related to this Agreement shall be made in writing and shall be effective when they are delivered personally or sent by registered mail to the addresses indicated in this Agreement. Any change of Address should be notified.

18.9 **Headings:** The headings used in this Agreement are for purposes of convenience only and shall not control the language or meaning of the provision following.

18.10 **Precedence:** In the event of any ambiguity or doubt or dispute on the terms and conditions applicable the order of precedence for the purposes of resolving such ambiguity, doubt or dispute shall be:

- (1) This Agreement
- (2) The Attachments (if any)
- (3) The Work Order (if any)



(4) Communications/Emails

(5) The RFP

19. ARBITRATION: Any dispute, difference, controversy or claim ("Dispute") arising between the Parties out of or in relation to or in connection with Agreement, or the breach, termination, effect, validity, interpretation or application of this Agreement or as to their rights, duties or liabilities hereunder, shall be addressed for mutual resolution by the authorized official of the parties. If, for any reason, such Dispute cannot be resolved amicably by the Parties, the matter shall be referred for the arbitration to the sole Arbitrator to be appointed by both the parties on mutual consensus. If both the parties do not arrive on mutual consensus for appointment of sole arbitrator, each party shall appoint one arbitrator. Both these arbitrators shall appoint third arbitrator and said Panel of three arbitrators shall adjudicate the dispute. The provisions of the Arbitration and Conciliation Act, 1996 or any statutory modifications on re-enactment thereof as in force will be applicable to the arbitration proceedings. The venue of the arbitration shall be at New Delhi. The cost of the Arbitration proceedings shall be shared equally by both the parties. The language of the arbitration and the award shall be English. The decision / award of the arbitrator shall be final and binding.

20. PENALTIES: The vendor will bear full responsibility for delays, which can be directly attributable to the sole actions and scope of work of the Vendor, in the project timelines.

The timelines as provided by the ICSI is to be strictly followed for each and every activity. In case, the **Vendor** fails to adhere to the timeline submitted in the technical bid / or as approved by ICSI, a penalty of Rs. 5000/- per day will be levied. Total grace allowed in the project is thirty days. In case, it is justified by the vendor and approved by the Institute that the delay is on account of any inaction on the part of the Institute and written communication has been provided to the Institute on this account, the penalty will not be enforced. Total Penalty in any case can't exceed 10% of the Contract Value. In case of delay beyond 365 days in design, development and implementation, the Institute reserves the right to terminate the agreement and recover the cost paid plus damages (capped at a upper limit of 10% of the Contract Value) from the Bank guarantee / security / EMD / other measures.

21. DELIVERY AND ACCEPTANCE: Deliverables will be formally accepted after ICSI certifies acceptance of the deliverables and recommends for payments to the **Vendor** within thirty (30) days from the date of submission of the deliverables. ICSI would generally not take more than four weeks for the acceptability of the deliverables. Any queries with regard to the deliverables will need to be answered by the **Vendor** within a week.

22. Documentation: The **Vendor** shall provide the following documentations in digitally signed soft copies (in USB / CD):

1. Application Architecture Document.
2. Detail Project Plan
3. Fortnightly progress reports



4. System Requirement Specification (SRS) document containing detailed requirement capture and analysis including functional requirement, Detail Design Document, Interface Specifications, application security requirements.
5. Complete Source Code with documentation
6. Test Plans and Test cases (including Unit Test Plan, System/Integration Test Plan, User Acceptance Test Plan, Security Test Plan, Load Test Plan)
7. Training Manuals
8. Systems Administration Manuals
9. User manuals
10. Installation / Deployment Manuals
11. Operational / Functional Manuals
12. Maintenance / Troubleshooting Manuals
13. Security policy and procedure for Portal including Password security, logical access security, operating system security, data classification, and application security and data backups.
14. Complete application IT security audit gaps resolution and compliance certifications.

Documents mentioned from S.no. 7 to 15 should be provided in two stages

1. Before Training (payment milestone 7)
2. After Rollout (payment milestone 9)

23. Security Audit: It is the responsibility of the selected bidder to get the security audit of the portal and should share the complete details of the audits along with copies of all communication and bug reports / removal, written or otherwise.

24. Inspection and Testing: The inspection of installation of services shall be carried out to check whether the services are in conformity with the mentioned in the RFP. The **Vendor** will test all operations and accomplish all adjustments (tuning) necessary for successful and continuous operation of the systems to the satisfaction of the ICSI.

The acceptance test will be conducted by ICSI or any other person nominated by ICSI, at its option. There shall not be any additional charges for conducting acceptance tests. All software should be complete. The **Vendor** shall maintain necessary log in respects of results of the tests to establish to the entire satisfaction of ICSI, the successful completion of the test specified.

25. Intellectual Property Rights: The Vendor shall ensure that it holds all necessary copyrights, license rights and other proprietary rights required in respect of any device or method used by it while providing the Services. The Vendor shall indemnify and hold ICSI harmless from and against any liability, penalty, cost or expense suffered or incurred as a result of Vendor failing to comply with his obligation under the Agreement.

Any software, hardware, data, awards, certificates, patents, and related outputs shall remain the exclusive property of ICSI. The Vendor shall transfer to ICSI all Intellectual Property Rights associated with the developed solution, except for any complete off-the-shelf platform. Ownership of the source code pertaining to ICSI-specific customizations shall vest with ICSI. The Vendor must deliver such customized source code to ICSI within fifteen (15) days from the date of system acceptance. At all times, the source code provided to ICSI shall be complete, accurate, and fully updated, corresponding exactly to the current production release of the software.



26. Genuine Software: Both parties agree that the software that is required to be used for the purposes as envisaged under Agreement shall be genuine and registered software and not a pirated version of any nature. Vendor undertakes that the software developed/ to be developed by it for the work shall be its own and that there shall no infringement of copy right/intellectual right of any other person. Vendor further undertakes that it shall indemnify, and keep the ICSI at all time indemnified against any such infringement.

27. Compliances of Law

- A. The Vendor shall provide the Services in strict compliance with all relevant laws and regulations of the State or Territory within India where the Services are being rendered and in accordance with the conditions of any permit, license or concession relating to any part of the Services, whether held by the Vendor, ICSI or any other concerned party.
- B. The Vendor shall indemnify and hold ICSI harmless at all times from and against any liability, penalty, cost or expense suffered or incurred as a result of the Vendor failing to comply with any law, or regulation, or such permit or license relating to any part of the Services.

29. Operational Acceptance: Successful completion of the contract will be gauged through a series of formal acceptance tests performed on all aspects of the system/sub systems:

In the go-live phase, **Vendor** will have to manage and roll out a beta stage where the system will be made available and restricted only to the users in ICSI through an appropriate mechanism on the web, and conduct user acceptance testing of the System based on test cases developed by the **Vendor** in consultation with ICSI and validated by ICSI. Based on the test results, required changes will be carried out and tested. Post this, ICSI portal will be officially launched and operational acceptance will be complete.

29. Unit Test and System integration test

- 1. Each module or Component should be fully tested independently before integration.
- 2. All specified functionality should exist. This testing verifies the as-built program's functionality and performance with respect to the requirements for the software product.
- 3. All System functions that are accessed through menus should be tested
- 4. After each module has been fully integrated to create a larger system, each module or sub-module must have a defined interface which will be used to call another program component.
- 5. Measuring response time, throughput and availability of Application.

30. Complete System Acceptance: At the end of the System Acceptance period, ICSI will acknowledge complete system acceptance in writing to the successful bidder upon completion of the following:





- a. All of the required activities defined in the bid document including all change requests agreed by ICSI and delivered by the bidder and accepted by ICSI.
- b. All the requisite documentation as defined in this bid document including all changes agreed by ICSI and delivered by the bidder and accepted by ICSI.
- c. All required training as defined in this bid document and delivered by the bidder and accepted by ICSI.
- d. All identified shortcomings/defects in the systems have been addressed to ICSI's complete satisfaction.
- e. In order to accept the system, ICSI must be satisfied that all of the work has been completed and delivered to ICSI's complete satisfaction such that all aspects of the system perform acceptably. The functional / logical acceptance of the system will only be certified when the proposed system is installed and configured according to the design and that all the detailed procedures of operating them have been carried out by the Bidder in the presence of ICSI staff.

31. Training: The successful bidder shall provide the following training:

1. Overview of the portal and Online forms to all ICSI users
2. A detailed technical demonstration to the IT team

32. Operations and Maintenance: The **Vendor** shall maintain and support the supplied software for a period of one year after the successful operational acceptance, including:

1. Maintenance for the portal.
2. Resolution of errors/bugs (if any), software updates.
3. Deploy adequate Technical Personnel to maintain the Portal as per the service level requirements.

33. LIQUIDATED DAMAGES: If the **Vendor** fails to complete the implementation of full-fledged system within the period specified in the purchase order, ICSI, shall without prejudice to its other remedies, deduct as liquidated damage 1.0(one) percent of the price of the delayed goods/services for every week of delay or part thereof subject to a maximum overall cap of 10% of the contract value. Completion of Implementation means the successful working of the System in live environment up to the satisfaction of the users and issue of written acceptance by the ICSI.

34. Jurisdiction: All disputes arising out of at any time, in connection with construction, meaning operation, effect, interpretation or out of this agreement or breach thereof are subject to the jurisdiction of Courts in Delhi.



**THE INSTITUTE OF
Company Secretaries of India**
IN PURSUIT OF PROFESSIONAL EXCELLENCE
Statutory body under an Act of Parliament

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed in duplicate as of the day and month and year first written above.

FOR M/s _____

FOR ICSI

AUTHORISED SIGNATORY

AUTHORISED SIGNATORY

NAME:

NAME:

DESIGNATION:

DESIGNATION:

DATE:

DATE:

In presence of

1.

2.