CORRIGENDUM

The date for submission of “Development and Implementation of Web-based Online Training Module” has been extended up to March 21, 2014 by 1:00 PM due to administrative reasons and date of opening the offers shall be on March 21, 2014 at 4:00 PM at ICSI-HQ.

Other terms & conditions of “Development and Implementation of Web-based Online Training Module” dated February 14, 2014 remains the same.

The bidders may take note the above changes.

Date: March 13, 2014

(B PRADHAN)
JOINT DIRECTOR
TENDER DOCUMENT

Sub: Tender for Development and Implementation of a Web-based Online Training Module

Tender No. PC: IT (Training)/2013-14
February 14, 2014

Part – A

The Institute of Company Secretaries of India herein after referred as “INSTITUTE / ICSI” is a statutory body constituted under an Act of Parliament i.e. the Company Secretaries Act, 1980. It is functioning under the overall administrative jurisdiction of Ministry of Corporate Affairs, Government of India having its Headquarters at “ICSI House”, 22 Institutional Area Lodi Road New Delhi-110 003.

Sealed tenders are invited by the Institute for the Development and Implementation of a Web-based Online Training Module with integration and data synchronization with existing setup to cater to all the activities of the Directorate of Training in the Institute, as per the Scope of work given herein as Annexure – I. The work includes Study, Analysis, Design, Development, Testing, Training, Documentation, Implementation and comprehensive Warranty/Maintenance of the implemented software for a period of one year from the date of the acceptance of the module by the Institute. The software module is to be developed in Dot Net Nuke framework and MS .net with SQL Server 2008 database under Window OS. The terms and conditions governing the instant Tender are as under:

1. The tender document may be obtained during working hours from February 14, 2014, to March 3, 2014 (till 1.00 PM) on all working days on payment of Rs. 500/- (Non refundable) from the Reception Counter of the Institute on Cash Payment or by submitting a demand draft in favour of “The Institute of Company Secretaries of India”, payable at New Delhi. The tender document can also be downloaded from the website of the Institute (www.icsi.edu) for which bidders would be required to enclose a demand draft of Rs. 500/- towards the cost of the tender document along with their quotes, failing which the tender shall not be entertained.

2. The sealed tenders are to be submitted as per prescribed format specified herein below on your business letter head duly stamped and signed and dated on each page of Part ‘A’, ‘B’ and ‘C’ of this tender document as unconditional acceptance to the terms prescribed by the Institute. Details/supporting documents wherever applicable, if attached with the
tender should be fully authenticated by the Bidder/s. No over-writings shall be accepted unless authenticated with full signature of the tenderer/s. A pre-bid meeting shall be arranged by ICSI on February 21, 2014 at 2:00 PM in ICSI Noida Office at C 37, Sector 62, Noida, U.P.

3. Tender should be submitted in two separate sealed covers/envelopes. First cover/envelope containing "TECHNICAL & INFRASTRUCTURE BID", should contain only technical specification of the company, literature, pamphlets etc printed by the Company. This bid should also contain complete details of technical solutions being offered and other infrastructure of the company as per Part A & B of the tender. The demand draft for EMD should also be inserted in this cover/envelope. Second cover/envelope containing, "COMMERCIAL BID" should provide only Price in the given format. The rates must be quoted in unit price as per Part C. Both the covers/envelopes should first be sealed separately, and then both the covers/envelopes should be kept in a single sealed bigger envelop.

4. The sealed tender duly superscribed, “Tender for Development and Implementation of a Web-based Online Training Module” due on March 3, 2014, should be addressed to Shri Sutanu Sinha, Chief Executive, The Institute of Company Secretaries of India. The Envelope should have the inscription “Tender for Development and Implementation of a Web-based Online Training Module” and should be sent at the Institute’s address given below either by registered post/speed post/or by dropping in the quotation box placed at 3rd floor of the ICSI Headquarter and it should reach on or before 3.00 P.M. on March 3, 2014.

Address:
Shri Sutanu Sinha
Chief Executive,
The Institute of Company Secretaries of India
22, Institutional Area, Lodi Road, New Delhi,

Tenders received after the stipulated date and time shall not be entertained. The Institute shall not be liable for any postal delay what so ever. Tenders received after the stipulated date and time are liable to be rejected summarily without giving any reason.

5. The technical & Infrastructure bids of the Bidders will be opened on March 4, 2014 at 10.00 A.M in the 3rd floor of the Institute’s Head Quarter at 22, Institutional Area, Lodi Road, New Delhi in the presence of the representatives of the bidders, who wish to be present on the scheduled date and time. No separate intimation will be sent to the bidders regarding opening of the technical bids. In the event of due date being a closed holiday or declared Holiday for Government offices, the due date for opening of the bids will be the following working day at the appointed date, time and venue.

6. The technical & Infrastructure bids of the Bidders will be evaluated by a Committee of officers as nominated by the Chief Executive of the Institute in the line of the eligibility criteria and technical evaluation criteria as mentioned in the tender document. Any outside Consultant / Advisor may also be a part of this Committee. The Institute shall have the right to assess the competencies and capabilities of the Tenderer(s) / Bidder(s) by going through the credentials given in the Technical Bid and on the basis of such credentials, the Institute may reject the candidature of the Tenderer(s) /
Bidder(s) without assigning any reason and decision of the Institute shall be final. In such case(s) the Financial Bid shall not be opened for that particular Tenderer / bidder.

7. **Eligibility Criteria for bidding:**
   a. The Bidder should be a CMMI Level-3 OR above certified.
   b. The Bidder should be a reputed software company and shall have completed at least two similar projects (Web based module for online services) in the above mentioned platforms for any government firm / public sector undertaking / Reputed Government recognized Institute OR University / Limited Company.

8. **Technical and infrastructure bids Evaluation Criteria:**
   a. The Bidder should fulfill the eligibility criteria for bidding as mentioned in clause no. 7. The Bidder who does not qualify these criteria may not be evaluated further and rejected at this point itself.
   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 and will carry total of 50 marks (10 x 5) in the evaluation process:
      • Understanding the requirement and terms & conditions of the tender.
      • Following the best methodology for Requirement Study, Software design, Software development, Software Testing, and Software Implementation.
      • Preparing various quality documentations for delivery.
      • Training and Change Management methodology for implementation of the software.
      • Demonstration of similar web based modules for online services developed and implemented recently for any other organisations under the above mentioned platform.
   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 and infrastructure bids and through bidder’s site visit and interaction with its officials. This will carry 25 marks in the evaluation process.
   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 and infrastructure bids and through client’s site visit and interaction with its officials. This will carry 25 marks in the evaluation process.

9. The bidder has to supply the following Documentations / Manuals to the Institute as part of the deliverables of the project in the form of hard copy as well soft copy (in a CD). All documents has to be got approved by ICSI:
   a. Existing System Study Report along with proposed Solution and timelines.
   b. Proposed System Design Document
   c. User Manual / Operation manual
   d. Technical / System Manual

10. The bidder has to supply the final source code of the software to the Institute in a CD after the acceptance of the module by the ICSI. The codes so delivered will also be implemented by the bidder in a test server and demonstrated to the officials of the Directorate of IT.
11. The bidder has to provide the following training on the implemented software:
   a. Operational Level Training to all the Users in the Directorate of Training & Membership and Directorate of IT. This training should be at least 8 hours practical / hand holding training of the users along with doubt clearing sessions.
   b. System Level / Technical Training to the selected IT Officials on the design solution, coding and maintenance aspects etc of the developed software. This training should be at least 8 hours practical / hand holding training of the users along with doubt clearing sessions.

12. The work as detailed in this tender shall be executed and completed within the period stipulated in the Work Order that will be issued in accordance with the terms of the tender document. The work shall however be carried out and completed in phases for which start date and completion date for various activities shall be mutually discussed and agreed upon after the award of work order. The work shall not be considered as completed until the Institute certifies in writing that the same has been completed.

13. Prices inclusive of all statutory taxes and other components (net to Institute) for services should be quoted in Part – C. The Bidder should also quote the charges for upgradation and AMC (after the completion of warranty period of one year) for the proposed module. The Bidder is bound to provide the services to upgrade and maintain the implemented module after warranty period on these quoted charges, if the Institute so desires to avail the service.

14. Bids should be valid for a minimum period of 180 (One hundred eighty) days after the due date.

15. The tenderers are required to deposit an Earnest Money of Rs. 40,000/- (Forty Thousand only) by way of demand draft drawn in favour of The Institute of Company Secretaries of India, payable at New Delhi. The tender not accompanied with Earnest Money shall not be entertained. The Earnest Money of unsuccessful Bidders will be returned without any interest/Bank commission/collection charges after the order has been executed successfully to the satisfaction of the Institute and the payment has been settled as per the Purchase Order.

16. Non acceptance of the terms & conditions as stated in Part A and non-submission of the stipulated Earnest Money Deposit (EMD) shall render the Tender invalid. Only Bidders whose experience particulars as stated in Part A & B are determined to be in consonance with Institute’s requirements shall be considered further in the Tender Evaluation Process.

17. The Bidders are required to study and understand the Institute’s current set-up including hardware, software, network, applications, website, other infrastructure, configurations etc and the requirements of the Directorate of Training while quoting the commercials.

18. Site for delivery and installation of the software and its components are:
   The Institute of Company Secretaries of India
   ICSI House, 22, Institutional Area, Lodi Road, New Delhi-110003
19. The whole work included in the Tender shall be executed by the Bidder and the Bidder 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.

20. The bidder has to sign a Service Level Agreement for the warranty and maintenance of the implemented module for a period of 1 year effective from the date of the acceptance of the module given by the Institute in the line of the terms and conditions of the tender document. The bidder has to sign a similar SLA with the Institute if it is entrusted for after warranty maintenance service.

21.  **Payment terms:**
   a.  80% payment after the implementation of the module and acceptance thereof given by the Institute.
   b.  20% payment after the completion of the warranty period of 1 year.

22. Incomplete quotations shall not be entertained.

23. The selected bidder’s team leader will be required to visit personally for a meeting with the Head of the Directorate of IT every week for project review /service performance review at Institute’s Noida office till the successful implementation of the module. During the warranty period this meeting will be held on monthly basis.

24. Commercial bids of only those Bidders will be opened who qualify in the technical and infrastructure bids evaluation process. The date, time and venue for opening the Commercial bids will be intimated to the technically qualified bidders only.

25. Evaluation of the commercial bids of the technically qualified bidders will be done on lowest quote basis.

26. The tenderer whose tender is accepted by ICSI shall be required to give a security deposit for faithful performance of the Tender. The total amount of **security deposit shall be Rs. 60,000/-.** No interest will be payable by ICSI on the security deposit, so held. Out of which, the EMD of Rs.40,000/- shall be converted into security deposit and the balance of the security deposit amounting to Rs. 20,000/- shall be provided by the tenderer through bank Draft or an irrecoverable Bank Guarantee from any Nationalized Bank in favour of The Institute of Company Secretaries of India. The Bank Guarantee shall be valid for a period of One year and shall be submitted within 10 days of the SLA is executed.

27.  **Penalty clause for non delivery:**
    The Bidder will be liable for paying penalty @1000/- per day for the delay period after the stipulated delivery date as mentioned in the work order. During the warranty period of 1 year OR during the after warranty period (in case of Annual Maintenance Contract (AMC)), the Bidder has to resolve every maintenance related complaint within a period of 2 days failing which the Bidder will be liable for paying penalty @1000/- per day for the delay period. The maintenance will cover all bugs in the system including minor modifications / upgradations in the software.
28. The Bidder will have to carry out the complete project work using its own resources (infrastructure and manpower). The Institute will only provide servers/machines where the software is to be deployed for acceptance testing and implementation including terminals for user trainings. The servers/machines will be provided once the development work is completed by the Bidder.

29. The bidder has to depute its same technical team on full time basis in the Institute's Noida Office / Lodi Road, New Delhi Office during the study, design, testing and implementation phase as per the schedule. The above mentioned technical team of the bidder will continue to report in the Institute on full time basis and work in coordination with the officials of the Directorate of Training & Membership and Directorate of IT till the module is implemented to the satisfaction of the Institute and acceptance for the same is given.

30. In the case of contravention of the any of the terms and conditions as stated in the tender documents, and if the Bidder withdraws or amends, impairs or derogates from the tender in any respect within the period of validity of the tender, the security deposit will be liable for forfeiture.

31. 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 Tenderer/Bidder or its staff, the Tenderer/Bidder shall be responsible to make the loss good. The Institute 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 Institute in this respect shall be final & binding on the Tenderer / Bidder.

32. The Institute without prejudice to any other remedy, reserves the right to terminate the Tender / Contract in whole or in part and also to blacklist a Tenderer / Bidder for a suitable period in case he fails to honour his bid / contract without sufficient grounds or found guilty for breach of condition /s of the tender / contract, negligence, carelessness, inefficiency, fraud, mischief, misappropriation or any other type of misconduct by such Tenderer / Bidder or by its staff.

33. Whenever under this tender / contract order any sum of money is recoverable from and payable by the Tenderer / Bidder, the Institute shall be entitled to recover such sum by appropriating in part or in whole from the security deposit of the Tenderer / Bidder. In the event of the security being insufficient, the balance or the total sum recoverable, as may be, shall be deducted from any sum due to the Tenderer / Bidder or which at any time thereafter may become due to the Tenderer / Bidder under this or any other tender / contract with the Institute. If this sum is not sufficient to cover the full amount recoverable, the Tenderer / Bidder shall pay the Institute on demand the remaining balance.

34. The Tenderer / Bidder shall indemnify the Institute against any claim, loss, damage, compensation etc. by third parties arising due to the negligence, carelessness, inefficiency, fraud, mischief, misappropriation, breach of term
or condition of the tender / contract or any other type of misconduct by such Tenderer / Bidder or by its staff.

35. The tenderer(s) / bidder(s) 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.

36. All disputes, differences, claims and demands arising under or pursuant to or touching this tender / contract shall be referred to the Sole Arbitrator to be appointed by the Secretary of the Institute of Company Secretaries of India, New Delhi. The Arbitration proceedings shall be held in accordance with the provisions of the Arbitration and Conciliation Act, 1996 or any statutory modifications on re-enactment thereof as in force. The award of the sole arbitrator shall be final and binding on both the parties. Place of such arbitration proceedings shall be at Delhi and cost of Arbitration proceedings shall be borne by the both parties equally.

37. The Institute reserves the right to cancel/modify/amend the terms and conditions for this tender without assigning any reason thereof and such decision of the Institute shall be final and binding on the parties.

38. For any details / clarifications, Shri Ankur Yadav, Senior Director of IT (0120 - 452 2012) may be contacted.

Date: February 14, 2014
(B PRADHAN)
JOINT DIRECTOR
SCOPE OF WORK

The Institute of Company Secretaries is a statutory professional body set up through an Act of the Parliament under the administrative jurisdiction of Ministry of Corporate Affairs. The Institute registers students for the Foundation, Executive and Professional stages of the Company Secretary-ship Course in distance education mode, conducts examination for the registered students, facilitates practical training to the students and enrols eligible CS passed students as Licentiate and/or member of the Institute as per the regulation. Directorate of Training & Membership is one of the departments in the Institute, which looks after the training needs of the students and membership related services. The Institute as a part of its decision to go total online for all the manual activities and services related to students and members desires to transform all the manual activities in the Training Section of the Directorate of Training & Membership through development and implementation of a Web-based Online Training Module. The tentative scope of the module to be developed is placed below by quoting various processes terms of reference. The bidder is however expected to study of its own the requirements in detail before submitting the bid. The proposed module shall use the existing data bases. The bidder is further expected to develop a generalised module such that the requirements mentioned below are catered to in all respect for any kind of changes in type of training, its structure and rules & regulations through creation of master data and their definitions in the database by the Administrator. The Institute has launched a new Course- ‘Corporate Compliance Executive Certificate’ Course’ in which students are required to pass at least one Module of Executive Programme and completed 6 months of training and other requirements as may be decided by the Council of the Institute from time to time. Being a new course, the data base of students is to be linked up with the training module and membership module, Dte. of Finance & Accounts for receipt of payments, updation of PDP hours and procedures involved includes eligibility check, issue of training sponsorship letter, issue of letter/certificate of CCEC, update of records of PDP hours, renewal of CCEC certificate, renewal fee etc. The developer shall require to develop the module to cater the Corporate Compliance Executive CertificateCourse including online services to the students, capture the training requirements, and related procedures and consequential changes if any in the system of this course in consultation with the Directorate of Information & Technology and other concerned Directorates / Regional Offices / Chapters of the Institute. Following are the various step wise processes of Training Section: - Guidelines/eligibility should be available to know the process/procedure for registration.
A) Company/ Financial Institutions/Banks/Other Organizations (Govt bodies, PSUs) for Registration
1. Form to be filled by the applicant (Company/Organization/Banks) with details of name of company, group name (if any), address, contact details, name & designation of contact person, name & membership number of the Company Secretary of the company (if any), amount of paid up share capital, turnover, number of trainees to be engaged, amount of stipend to be offered etc.

(At present the criteria of Paid up share capital required for 15 months training is 50 lacs and for 03 months practical training is 25 lacs) In case of a Bank, details of fixed assets, brief profile, infrastructure available for training, number of trainees to be engaged, amount of stipend to be offered etc) are required.

2. Training Type to be selected (15 months / 03 months/ 15 days). Multiple options may be selected.

3. Upload the Request letter duly signed, Balance Sheet, Supporting Documents etc.

4. Call for further details or documents, if required.

5. In case the applicant is not fulfilling the eligibility the form should not reach to the user department/ notification should generate automatically and should reach the applicant with appropriate reason of rejection for e.g. requisite paid up share up share capital of the Company..

6. Approve/Reject

7. Data be recorded automatically, if approved.

8. Letter /Report generated

9. Letter should be issued through email automatically for approval/ rejection as the case may be.

10. SMS notification should be sent to the company/organisation.

B) PCS Registration

C) Guidelines/eligibility should be available to the applicant before applying for registration

1. Form to be filled by the applicant (PCS) with details of name, COP Number, Date of Issue of COP, address, contact details, number of trainees to be engaged, amount of stipend to be offered, Broadly areas of practice, working hours, gross annual income etc.

2. Training Type to be selected

3. Upload the Request letter duly signed, Copy of COP certificate etc.

4. Call for further details or documents, if required.

5. In case the applicant is not fulfilling the eligibility the form should not reach to the user department/ notification should generate automatically and should reach the applicant with appropriate reason of rejection.

6. Approve/Reject

7. Data be recorded automatically, if approved.

8. Letter /Report generated

9. Letter should be issued through email automatically for approval/ rejection as the case may be.

10. SMS notification should be sent to the PCS.
C) Law Firm/Consultancy Firm/ LLP etc

1. Form to be filled by the applicant along with details of name, address, contact details, name & designation of contact person, name & number of all partners, name & number of partners enrolled as Advocate (in case of law firm), number of trainees to be engaged, amount of stipend to be offered, broad areas of practice, details of infrastructure etc.
2. Training Type to be selected
3. Upload request and supporting documents
4. Call for further details or documents, if required.
5. Approve/Reject
6. Data be recorded automatically, if approved.
7. Letter /Report generated
8. Letter should be issued through email automatically for approval/ rejection as the case may be.
9. SMS notification should be sent to the firm.

D) Placement of students for training:
1. Form to be filled by the applicant (Student) with details like Training Type, Desired city for training etc.
2. Upload the Resume
3. Data be recorded automatically
4. Facility to be provided to Companies/PCS/ other entities to upload vacancy for training.
5. Call for further details or documents, if required.
6. Approve/Reject
7. Students (filtered as per the requirement of companies etc.) can apply for vacancy for training
8. Report generated

E) Request for issue of Bio-data (Pre-sponsorship) letter:
1. Form to be filled by the applicant (Student/Trainer) with details of Name of Trainer, Training Type etc.
2. Check whether desired trainer is already registered with the Institute.
3. If not found registered, an email/letter to be sent communicating that trainer is not registered.
4. Check eligibility of desired trainer
5. If found not eligible, an email/letter to be sent communicating about ineligibility of trainer.
6. Call for further details or documents, if required.
7. Approve/Reject
8. Data be recorded automatically, if approved.
9. Letter /Report generated
10. Letter should be issued through email automatically for approval/ rejection as the case may be.
11. SMS notification should be sent
F) Registration of Training including balance training (15 months/03 months /15 days):
   1. Form to be filled by the applicant (Student) with details of Name of Trainer, Training Type, date of commencement of training, Date of commencement and termination of previous training (if any) etc.
   2. Upload the training documents such as contract (in case of PCS)/appointment letter (in case of companies and other entities)/Training Termination Certificate from previous trainer in case of transfer of training etc.
   3. Check whether desired trainer is already registered with the Institute.
   4. If not found registered, an email/letter to be sent communicating that trainer is not registered.
   5. Check eligibility of desired trainer.
   6. If found not eligible, an email/letter to be sent communicating about ineligibility of trainer.
   7. Call for further details or documents, if required.
   8. Approve/Reject
   9. Data be recorded automatically, if approved.
   10. Letter /Report generated
   11. Letter should be issued through email automatically for approval/ rejection as the case may be.
   12. SMS notification should be sent.

G) Quarterly Report:
   1. Form to be filled by the applicant (Student) with details of Student Registration Number, Name, Name of Trainer, Quarter No., Duration of Quarter (Dates From and To), Number of leaves availed during the quarter etc.
   2. Upload the Quarterly Report duly signed by the trainer
   3. Call for further details or documents, if required.
   4. Approve/Reject
   5. Data be recorded automatically, if approved.
   6. Acknowledgement Letter /Report generated
   7. Acknowledgement should be issued through email automatically for approval/ rejection as the case may be.
   8. SMS notification should be sent.

H) Project Report:
   1. Form to be filled by the applicant (Student) with details of Student Registration Number, Name, Name of Trainer, Topic of Project Report etc.
   2. Upload the Project Report duly certified /authenticated
   3. Call for further details or documents, if required.
   4. Approve/Reject
   5. Data be recorded automatically, if approved.
   6. Acknowledgement Letter /Report generated
7. Letter should be issued through email automatically for approval/ rejection as the case may be.
8. SMS notification should be sent

I) Training Completion Certificate:
1. Form to be filled by the applicant (Student) with details of Student Registration Number, Name, Name of Trainer, Duration of Training (dates From & To), Number of leave availed etc.
2. Upload the prescribed certificate duly authenticated
3. Call for further details or documents, if required.
4. Approve/Reject
5. Data be recorded automatically, if approved.
6. Acknowledgement Letter /Report generated
7. Letter should be issued through email automatically for approval/ rejection as the case may be.
8. SMS notification should be sent

J) Training Termination Certificate:
1. Form to be filled by the applicant (Student/Trainer) with details of Student Registration Number, Name, Name of Trainer, Duration of Training (Commencement date & Termination date), Number of leave availed etc.
2. Upload the prescribed certificate duly authenticated
3. Call for further details or documents, if required.
4. Approve/Reject
5. Data be recorded automatically, if approved.
6. Acknowledgement Letter /Report generated
7. Letter should be issued through email automatically for approval/ rejection as the case may be.
8. SMS notification should be sent

K) Data of students completed Student Induction Programme (SIP)
1. Form to be filled by the CCGRT/Regional /Chapter office with details of Student Registration Number, Name, Batch Number, Duration of Training (dates From & To) etc.
2. Call for further details or documents, if required.
3. Approve/Reject
4. Data be recorded automatically, if approved.
5. Acknowledgement Letter /Report generated
6. Letter should be issued through email automatically for approval/ rejection as the case may be.
7. SMS notification should be sent

L) Data of students completed Executive Development Programme (EDP)
1. Form to be filled by the CCGRT/Regional /Chapter office with details of Student Registration Number, Name, Batch Number, Duration of Training (dates From & To) etc.
2. Call for further details or documents, if required.
3. Approve/Reject
4. Data be recorded automatically, if approved.
5. Acknowledgement Letter /Report generated
6. Letter should be issued through email automatically for approval/ rejection as the case may be.
7. SMS notification should be sent

M) Data of students completed Professional Development Programme (PDP)
1. Form to be filled by the CCGRT/Regional /Chapter office with details of Student Registration Number, Name, Batch Number, Duration of Training (dates From & To), Hours of Programme etc.
2. Call for further details or documents, if required.
3. Approve/Reject
4. Data be recorded automatically, if approved.
5. Acknowledgement Letter /Report generated
6. Letter should be issued through email automatically for approval/ rejection as the case may be.
7. SMS notification should be sent

N) Data of students completed Management Skills Orientation Programme (MSOP):
1. Form to be filled by the CCGRT/Regional /Chapter office with details of Student Registration Number, Name, Batch Number, Duration of Training (dates From & To) etc.
2. Call for further details or documents, if required.
3. Approve/Reject
4. Data be recorded automatically, if approved.
5. Acknowledgement Letter /Report generated
6. Letter should be issued through email automatically for approval/ rejection as the case may be.
7. SMS notification should be sent

O) Training Exemption

P) Guidelines/Procedure for claiming exemption for various types of training should be available to the candidate
1. Form to be filled by the applicant with details of Name of past and Present employers, Designation and Duration of employment (dates From & To) towards each employer
2. Upload documents from past and present employers such as a copy of appointment letter, Salary Slips (first & last pay), Experience Certificate indicating designation, duration, job contents in brief duly authenticated by the appropriate authority with name and designation of the organization, organization chart indicating the position in the organizational hierarchy duly certified by the employer and certified copy of Balance Sheet (indicating Details of paid up capital, reserves & surplus & fixed assets), Copy of Final/Professional Programme Pass mark sheet/ Certificate etc.
3. Call for further details or documents, if required.
4. Approve/Reject in 3 stages (As per the internal procedure)
5. Data be recorded automatically
6. date wise and registration number wise, if approved.
7. Acknowledgement Letter /Report generated
8. Letter should be issued through email automatically for grant of exemption/rejection/Call For

Reports to be generated date wise and registration number wise and Regionawise & Chapter wise

9. SMS notification should be sent

10. requirement of Practising Chartered Accountant and Advocates
   a) A Copy of Certificate of Practice as CA
   Experience Certificate along with Annual Report from Companies for which you have conducted Internal/statutory audit etc in support of your continuous practice as a Chartered Accountant for at least three years
   b) Document for enrolment as an High Court Advocate
   c) Experience Certificate along with Annual Report from Companies to which you have rendered services as Counsel/ Advisor in support of your continuous practice as an Advocate in a High Court for at least three years.

For claiming exemption from 15 days training in optional area with any one specialized agency, relevant work experience is required

1. Application Form for Management /Apprenticeship/ Practical Training/ Exemption from undergoing Training. (ST-10)
2. Experience Certificate (s) indicating exact designation, duration of service, salary drawn, job contents in brief duly signed by the appropriate authorized signatory of the employer organization.
3. Salary slip for the beginning and last pay drawn from the organization(s)
4. Appointment letter from past/present employer.
5. Training Completion Certificate for 15 months
6. Annual Report(s) in respect of the organization(s)
7. Copy of Professional Programme Pass Certificate

P) Exemption from Student induction Programme (SIP)/ Executive Development Programme (EDP)/ Professional Development Programme (PDP)

1. Exemption Form to be filled by the applicant with details like Name, Student Registration Number Name of past and present employers, Designation and Duration of employment (From & To) towards each employer, Qualifications etc.
2. Upload documents from past and present employers such as Experience Certificate indicating designation, duration, job contents in brief duly authenticated by the appropriate authority of the organization, Qualification Certificates etc.
3. Call for further details or documents, if required.
4. Approve/Reject
5. Data be recorded automatically, if approved.
6. Acknowledgement Letter /Report generated
7. Letter should be issued through email automatically for approval/ rejection as the case may be.
8. SMS notification should be sent to students

Q) Admission as an Associate Membership Application:
1. Form to be filled by the applicant (Student) with details Completion of all training with name of training and dates of training (from & to) etc.
2. Payment of requisite fee
3. Payment acknowledgement generated and sent through email automatically
4. Upload the Form A, Computer Training/SIP/EDP/PDP/MSOP completion certificate, 15 months Training Completion Certificate, 15 days training completion certificate, Specimen signature card, two fitness certificate, date of birth proof, degree certificate and other documents as prescribed.
5. Check whether training completed
6. Check whether quarterly report submitted
7. Check whether project report submitted
8. Call for further details or documents, if required.
9. Approve/ Reject by Training Section
10. SMS notification should be sent
11. Forward to membership section for further necessary action
12. Membership Section will check and Call for further details or documents, if required.
13. Approve/ Reject (Approval of the competent authority)
14. Data be recorded automatically, if approved.
15. Membership Number be generated as per database
17. Letter should be issued through email automatically for approval/ rejection as the case may be.
18. SMS notification should be sent

R) Programme Report by CCGRT/Regional /Chapter office:
1. CCGRT/Regional /Chapter office should be able to submit reports of all training programmes such as SIP, EDP, MSOP etc.
2. CCGRT/Regional /Chapter office be given access to update the details of completion of training programmes i.e. SIP, EDP, PDP and MSOP pertaining to name and student registration number of the student, name of training programme, batch number, duration, dates of programme (from & to), date of programme and hours (in case of PDP) etc.
3. CCGRT/Regional/Chapter offices to be provided facilities to upkeep all the records, make communication with the students, issue certificates and other related things through the module.

S) Reports required:

All Existing type of report option provided in the existing Client Server based .Net Training Module are given below. All these reports are to be made a part of the proposed web-based online training module.

1. STIPEND_WISE_LIST_OF_REGISTERED_COMPANIES.rpt
2. ACTIVE COMPANIES REGION WISE STATE WISE CITY WISE (MT_PT).rpt
3. DORMANT COMPANIES REGION WISE STATE WISE CITY WISE (All Over India).rpt
4. DORMANT COMPANIES REGION WISE STATE WISE CITY WISE (MT_PT).rpt
5. LIST OF ACTIVE_DORMANT COMPANIES IMPARTING TRAINING.rpt
6. LIST OF STOCK EXCHANGE REGION WISE_STATE-WISE_ CITY WISE.rpt
7. LIST_OF_COMPANY_SECRETARIES_NAMEWISE.rpt
8. STUDENT_UNDERGOING_MT_AT_BETWEEN_TWO_DATE(COMMENCEMENT WISE).rpt
9. LIST_OF.Student_UNDERGOING_PRACTICAL TRAINING.rpt
10. LIST_OF STUDENTS.DOING_MT_AT_WHOSE QUARTERLY REPORTS HAVE BEEN RECEIVED.rpt
11. LIST_OF_STUDENTS_WHO_HAVE_BEEN_EXEMPTED_FROM_UNDERGOING_MT_AT Training.rpt
12. STUDENTS WHO HAVE COMPUTER AWARENESS.rpt
13. LetterForMT.rpt
14. LetterforRC.rpt
15. Complete_Top_Between_Two_Date.rpt
16. AdditionalReport.rpt (LIST OF EXECUTIVE/FINAL PASSED STUDENT)
17. STUDENTS_UNDERGOING TRAINING IN A PARTICULAR COMPANY_CS.rpt
18. STUDENT_WHOSE TRAINING SHOULD HAVE BEEN COMPLETED.rpt
19. List_Label_of_Students_sponsered_who_have_completed_TOP.rpt
20. Label_of_Students_sponsored_who_have_completed_TOP.rpt
21. STUDENTS_WHO_HAVE_COMPLETED_MT_AT_BETWEEN_SPECIFIED_DATES.rpt
22. STUDENTS_WHO_HAVE_COMPLETED_PT_BETWEEN_SPECIFIED_DATES.rpt
23. LIST_OF_STUDENTS_WHO_HAVE_BEEN_EXEMPTED_FROM_UNDERGOING_PT TRAINING.rpt
24. COMPLETION_CERTIFICATE_RECEIVED.rpt
25. List_Students_Completed_ADP.rpt
26. STUDENTS_WHOSE_BIODATA_HAS_BEEN_SENT.rpt
27. Miscellaneous_Letter.rpt
28. MT_PT_Companies.rpt
29. LIST_OF_COMPANIES_NOT_PROVIDING TRAINING BUT HAVING_CS.rpt
30. List_of_students_who's_BioData_forwarded_but_not_selected_as_trainees_bu t_completed_TOP.rpt
31. List_of_students_who's_BioData_forwarded But not selected_as_trainees Bu t_completed_ADP.rpt
32. List_of_Students_sponsered_who_have_completed_ADP.rpt
33. LIST OF COMPANIES ENGAGED TRAINEE ONCE ONLY.rpt
34. LABELS FOR COMPANIES ENGAGED TRAINEE ONCE ONLY.rpt
35. DETAILS OF CANDIDATES BETWEEN TWO DATES FOR QUARTERLY REPORTS RECEIVED.rpt
36. LIST OF ACTIVE COMPANIES NOT TAKEN TRAINEES SO FAR.rpt
37. LABELS FOR_ACTIVE COMPANIES NOT TAKEN TRAINEES SO FAR.rpt
38. Management_Information_Report.rpt
39. List_of_Students_whose_Biodata_has_been_sent_but_not_sponsored_for_training.rpt
40. Label of Students whose Biodata has been sent but not sponsored for training.rpt
41. LIST OF ACTIVE_DORMANT COMPANY SECRETARIES IMPARTING TRAINING.rpt
42. LIST OF COMPANY SECRETARIES REGION WISE STATE WISE CITY WISE.rpt
43. LIST OF ACTIVE COMPANIES WHO HAVE TAKEN TRAINEES EARLIER BUT PRESENTLY NO TRAINEE.rpt
44. LABELS FOR ACTIVE COMPANIES WHO HAVE TAKEN TRAINEES EARLIER BUT PRESENTLY NO TRAINEE.rpt
45. LABELS FOR COMPANIES IMPARTING MTPT AT PRESENT.rpt
46. DispatchBiodataForMT.rpt
47. DispatchBiodataForAT.rpt
48. DispatchBiodataForPT.rpt
49. DispatchBiodataForPTforPCS.rpt
50. TrainingLetterAT.rpt
51. TrainingLetterPT.rpt
52. TrainingLetterPTforPCS.rpt
53. LIST FOR COMPANIES IMPARTING MTPT AT PRESENT DATEWISE.rpt

Along with the above following reports are also required:-
1. List of total registered companies imparting MT/PT, region wise, state wise, city wise
2. List of company secretaries in practice registered for imparting training region wise, state wise, city wise
3. Daily/Monthly/Quarterly/Yearly /between two given dates MIS of number of all request received by its type, action, pending for action, status etc.
4. Quarterly and Date wise report of exemption granted under regulation 48/52, 48, 52,48/53, 53
5. Exemption granted as per under regulation 48/52, 48, 52,48/53, 53
6. Reports be provided in respect of all the processes pertaining to training and CCEC- date wise, registration number wise, region wise, chapter wise indicating all the details.
7. Periodical report of emails/SMS sent to the applicants.
8. Any other reports.

GENERAL
1. Existing databases of Training Section must be incorporated in New Module being developed.
2. Administrator shall be able to view complete status of a particular student or company/PCS/law firm/Consultancy firm etc.
3. Advanced Search options be provided covering the whole module.
4. At all steps where student fills registration number, other details should be viewed as prefilled such as name, address, result, qualification and other details.
5. Administrator should be given option to include various Training Types.
6. Proposed New Training Structure be kept in mind while designing and developing the online module.
7. Clubbing or separation of processes should be done wherever feasible.
8. The above processes are indicative and are subject to change or modification during the development of the module.

**Specific Technical Requirements in the proposed module**

1. SMS/Email log has to be maintained for every communication sent to student.
2. Web portal should maintain logs of upload/download documents and letters of trainees and companies.
3. Training status of a student should be displayed in terms of days in the form of a graph or a progress bar with training type along with exemption details.
4. Data Integration with student database and member database.
5. Online help facility for each screen/report/query/process is to be developed and implemented.
### PART ‘A’

**INFRASTRUCTURAL BID**

<table>
<thead>
<tr>
<th>Sl.No.</th>
<th>Particulars.</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Name and complete address of the Company submitting the tender (Profile Document to be attached)</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Tele/Fax/E-mail/Cell No. Of the company submitting the tender</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Contact person’s name &amp; residence telephone No.</td>
<td></td>
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<tr>
<td>4</td>
<td>Details of registered office, along with contact person's name and tele. no.</td>
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<tr>
<td>5</td>
<td>Income-tax registration number along with documentary evidence</td>
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<tr>
<td>6</td>
<td>Please also specify, if you are registered with appropriate Authority under Works Contract Act, 1999. (Please provide details)</td>
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<tr>
<td>7</td>
<td>List of existing three clients to whom services in last 2 year provided with details of company, value of business, concerned person name &amp; his telephone no. (Please attach full details)</td>
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</tr>
<tr>
<td>8</td>
<td>Please indicate in full the following details:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>A) Manpower available – Technical &amp; Functional who can provide support, in case of requirement.</td>
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</tr>
<tr>
<td></td>
<td>B) Turnover of the company as a whole for 2011-12 and 2012-13 financial years along with the turnover from the software development separately (Please attach supporting documents)</td>
<td></td>
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</tbody>
</table>

* Name and Bio Data of the critical team members must be enclosed as annexure to the proposal
## PART ‘B’

### TECHNICAL BID

<table>
<thead>
<tr>
<th>Sl.No.</th>
<th>Particulars.</th>
<th>Response</th>
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<tbody>
<tr>
<td>1</td>
<td>Describe the proposed solution and system development &amp; implementation approach to the project as per the tender document with justification and benefits thereof.</td>
<td></td>
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<tr>
<td>2</td>
<td>Provide the detailed project plan starting with day zero in an Excel format including roles and responsibilities.</td>
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<td>3</td>
<td>Describe the list of services covered in annual support</td>
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<tr>
<td>4</td>
<td>List of three (three) clients and the details of relevant work done for them. Out of them at least 2 (two) clients should be from government firm / public sector undertaking / Reputed Government recognized Institute OR University / Limited Company.</td>
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<td>5</td>
<td>Description of the support handling structure and process</td>
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<td>6</td>
<td>Detailed Escalation Matrix for development and maintenance service</td>
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<tr>
<td>7</td>
<td>Provide the Proof for CMM Level-5 OR above certification of your Firm</td>
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</tr>
<tr>
<td>SNO</td>
<td>Pricing Head</td>
<td>Net Cost in INR (Inclusive of all Taxes)</td>
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<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------</td>
</tr>
<tr>
<td>1.</td>
<td>System Study, Analysis, Design; Software Development; Testing; Training; Documentation; including Implementation &amp; Warranty (for 1 year)</td>
<td></td>
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<td>2.</td>
<td>Software Upgradation Cost which occurs due to change management in processes outside the scope of this tender</td>
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<td></td>
<td>• Development Cost per New Form / Process / Report</td>
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<tr>
<td></td>
<td>• Major Upgradation Cost per existing Form / Process / Report</td>
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<td></td>
<td>• Per Man-day cost</td>
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<tr>
<td>3.</td>
<td>After Warranty Maintenance cost per annum</td>
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