

भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

INDIAN INSTITUTE OF MANAGEMENT UDAIPUR
(An Autonomous Institute under the Ministry of Education, Govt. of India)

E-TENDER DOCUMENT FOR “IIMU CRM, Admissions and Executive Education Administration Platform”



Tender reference No. - IIMU/Tender/IIMU AdmissionsExEd/2024 dated 06 Jan 2025

Indian Institute of Management Udaipur Balicha, Udaipur-313001, Rajasthan Website:
www.iimu.ac.in

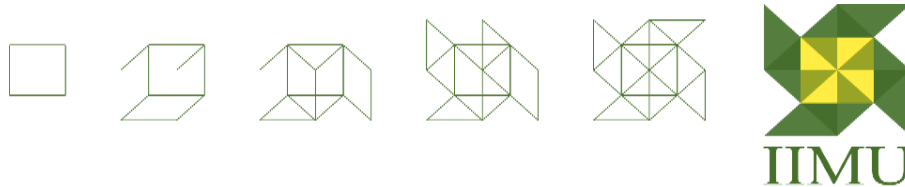
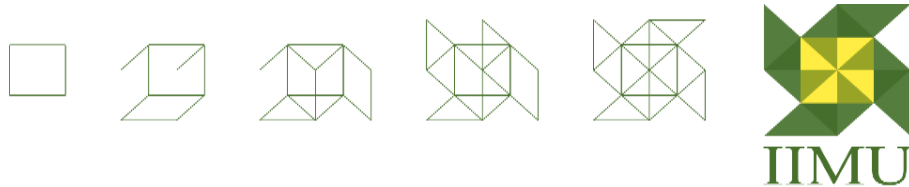


TABLE OF CONTENTS

S NO	ITEMS	PAGE NO
1.	Notice Inviting Tender (NIT)	03
2.	Appendix to NIT: Tender Information Summary (TIS)	05
3.	Annexure I: Scope of work and Technical Bid	07
4.	Annexure II: General Terms and Conditions of the contract	13
5.	Annexure III: Agency details	19
6.	Annexure IV: Instructions for online bid submission	20
7.	Annexure V: Pre-Qualifications Conditions	23
8.	Annexure VI: Technical Bid Evaluation	27
9.	Annexure VII: Tender acceptance letter	35
10.	Annexure VIII: Performa for performance bank guarantee	36
11.	Annexure IX: Pre-bid meeting	38
12.	Annexure X: Agency Turnover Certificate	49
13.	Annexure XI: Single Customer/Entity of IIMU CRM, Admissions and Executive Education Administration Platform	40
14.	Annexure XII: Technical Bid Eligibility Criteria - Undertaking	41
15.	Annexure XIII: Functional RFP - Admissions for Degree granting programmes other than 2-year MBA Functional RFP – Executive Education Administration	42 50
16.	Annexure XIV: Financial quote elements-BoQ	60



भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

NOTICE INVITING TENDER (NIT) FOR “IIMU CRM, Admissions and Executive Education Administration Platform”

1. Indian Institute of Management Udaipur (hereinafter referred to as “IIMU”) is an Autonomous Institute under the Ministry of Education, Government of India. IIM Udaipur is recognized as the premier management institution in the country. IIM Udaipur started its operations in 2011 and operates from its permanent campus located at Balicha, Udaipur, Rajasthan with a present strength of approximately 150 faculty and staff. Taking the legacy of older IIMs forward, IIMU aspires to set new benchmarks in the field of management education by combining excellence in both teaching and research. IIM Udaipur is committed to becoming a globally recognized management school by 2030. With accomplished faculty, a flourishing research ecosystem and success in attracting the best minds of the country, IIMU is able to champion the core values of excellence and integrity.

2. IIMU invites an E-tender (online tender) from the reputed and experienced service provider (hereinafter referred to as “Agency” or “Bidder”) under two bid system Technical Bid (Part-I) & Financial Bid (Part-II) for providing IIMU CRM, Admissions and Executive Education Administration Platform at IIM Udaipur.

3. **Bidders must read the complete Tender Documents:** This NIT is an integral part of the Tender Document and serves a limited purpose of invitation and does not purport to contain all relevant details for submission of bids. ‘Tender Information Summary’ (TIS) appended to this notice gives a salient summary of the tender information. The Bidders must go through the complete Tender Document for details before submission of their Bids.

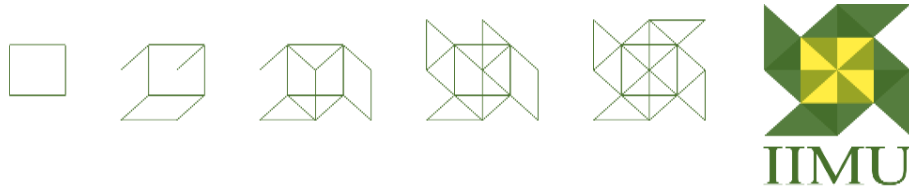
4. **‘The Bidders shall sign and stamp each page of this tender document as a token of having read, understood, and complied with the tender, the terms and conditions contained herein. Only online bids/tenders will be accepted. Incomplete bids/documents shall be rejected without giving any reason.’**

5. **Availability of the Tender Document** -This tender document containing eligibility criteria, scope of work, terms, and conditions, specifications, and other documents, can be downloaded at/from the Central Public Procurement (CPP) Portal <https://eprocure.gov.in/cppp/> or Indian Institute of Management Udaipur website: www.iimu.ac.in .

6. **Clarifications** – A Bidder requiring any clarification regarding the Tender Document may ask questions in writing/ electronically from Office/ Contact Person as mentioned in TIS, provided the questions are raised before the clarification end date mentioned in TIS. This deadline shall not be extended.

7. **Pre-bid Conference:** - The Bidders are requested to attend a Pre-bid conference for clarification on the Tenders’ technical specifications and commercial conditions, on the time, date, and place mentioned in the TIS. Participation in such a Pre-bid Conference is not mandatory. If a bidder does not participate or submit any query, then no subsequent representations from them regarding the Technical/ commercial specifications/ conditions shall be entertained. **The procuring entity reserves the right to have multiple pre-bid meetings.**

8. **Submission of Bids, EMD, and Tender document fee:** - Bids shall be submitted through online mode under the e-procurement system. No manual Bids shall be made available or accepted for



भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

submission. The bidders have to apply online through E-Procurement portal <https://eprocure.gov.in/cppp/> only. The original EMD and tender fee is to be submitted in a sealed envelope to be superscribed to this tender name & the name of their organization and must reach the below address before the last date & time for submission of the bid.

**The Chief of Administration IIM Udaipur,
Balicha, Udaipur-313001, Rajasthan**

9. Cost of EMD & Tender Cost is exempted for bidders (Micro, Small & Medium Enterprises) registered with District Industries Centre or any other bodies specified by the Ministry of Micro, Small & Medium Enterprises for the relevant category (as indicated in scope of work) and having valid registration certificate as on date of tender submission. The MSMEs would not be eligible for exemption of Tender Cost and EMD if:

(a) They are not registered to provide services in the relevant category.

OR

(b) They do not have valid registration as on the date of tender submission for subject works.

The tenderers seeking exemption from “EMD”, being MSMEs, shall ensure their eligibility w.r.t., above and submit a registration certificate issued by the body under which they are registered which clearly mentions the relevant category (as per the scope of work) and Terminal Validity of registration. In the absence of any of the above requirements no exemption for “Cost of EMD” will be allowed and tenderer eligibility shall be dealt with as if they are not registered Centre or any other body(s) specified by the Ministry of MSME.

10. The tenders without the Earnest Money shall be summarily rejected.

11. The tender security (EMD) may be forfeited:

(i) If the Tenderer withdraws his tender during the period of tender validity specified by the Tenderer in the tender form; or

(ii) In the case of a successful Tenderer, if the Tenderer

(a) Fails to sign the contract in accordance with the terms of the tender document.

(b) Fails to furnish required performance security in accordance with the terms of the Tender document within the time frame specified by the client.

(c) Fails or refuses to honour his own quoted prices for the services or part thereof

12. **Bid Opening-** Bids received shall be opened online at *the specified date and time given in TIS*. If the office is closed on the specified date of opening of the bids, the opening shall be done on the next working day at the same time.

13. **Disclaimers and Rights of Procuring Entity -** The issue of the Tender Document does not imply that the Procuring Entity is bound to select bid(s), and it reserves the right without assigning any reason to:

a. reject any or all of the Bids, or

b. cancel the tender process, or

c. abandon the procurement of the Services; or

d. issue another tender for identical or similar services.

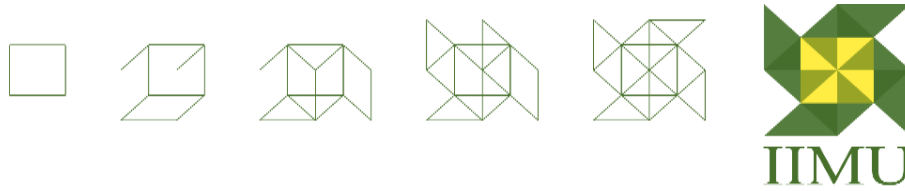
Note: For further details, please refer to the appended TIS and the complete Tender Document.

Chief of Administration

Signature of Bidder

Page 4 of 61

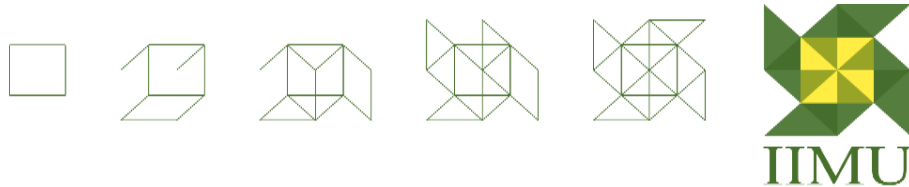
Signature of HOD



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

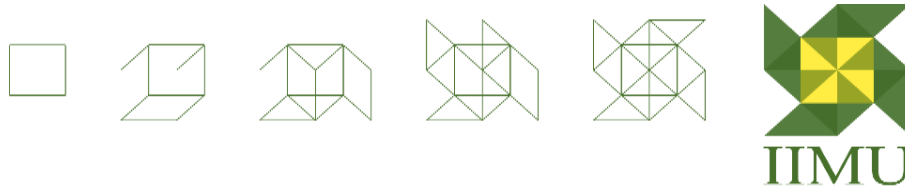
APPENDIX TO NIT: TENDER INFORMATION SUMMARY

TENDER INFORMATION SUMMARY (TIS)			
1.0 Basic Tender Details			
Tender Title	IIMU CRM, Admissions and Executive Education Administration Platform		
Tender Reference Number	<u>IIMU/Tender/ IIMU CRM-Adm-ExEd /2024</u>		
Estimated cost of tender	Rs. 1,69,00,000 (Rupees One crore and sixty-nine lakhs only excluding GST) (Licenses/platform cost for 5 years + one-time implementation cost + annual maintenance of platform and customizations /extensions / integrations for 5 years)		
Tender Type	Open		
Tender Category	Services	No. of Covers	Two
Tender Inviting Authority (TIA)	IIM Udaipur	Address	IIM Udaipur, Balicha, Udaipur 313001
2.0 Critical Dates			
Published Date	06 Jan 2025 at 1800 hrs.	Bid Validity (Days from the date of Tender Opening)	90 days
Document Download Start Date & Time	06 Jan 2025 at 1800 hrs.	Document Download End Date & Time	28 Jan 2025
Bid Submission Start Date & Time	06 Jan 2025 at 1800 hrs.	Bid Submission Closing Date & Time	28 Jan 2025 at 1000 hrs.
Tender Opening Date & Time	28 Jan 2025 at 1100 hrs.	Tender Opening (Financial bid) Date & Time	Will be intimated later
3.0 Obtaining the Tender Document and clarifications.			
eProcurement Portal and helpdesk for Document availability and submission	https://eprocure.gov.in/eprocure/app		
	www.iimu.ac.in		
Office/ Contact Person/ email for clarifications	Phone - 9448027191 Email - procurement@iimu.ac.in, erpsselcomm@iimu.ac.in		
4.0 Pre-bid Conference			
Place, time, and date of the Pre-bid Conference	16 Jan 2025 at 1100 hrs. A Zoom link for the pre-bid meeting will be shared with interested participants. The bidders are requested to share their details, including the organization name, contact person, email address, and phone number, to the following email addresses		



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

TENDER INFORMATION SUMMARY (TIS)	
	to register their participation: procurement@iimu.ac.in, erpselcomm@iimu.ac.in
Place, time, and date before which Written queries for the Pre-bid conference must be received	IIM Udaipur by 1800 hrs. on 15 Jan 2025 by 1800 hrs. Queries may be shared to the following email - procurement@iimu.ac.in, erpselcomm@iimu.ac.in
Place, time, and date before which registration of participants for the Pre-bid conference must be received.	IIM Udaipur by 1800 hrs. on 15 Jan 2025 by 1800 hrs. nomination may be shared to the following email - procurement@iimu.ac.in, erpselcomm@iimu.ac.in
5.0 Submission and Opening of Bids	
Submission of Bids	The bid shall be submitted online on the CPP Portal
Instructions for Online Bid Submission	As per the annexure attached to the tender. Documents.
Tender Opening Place	On e-procurement portal
6.0 Presentation by the Bidder	
Place, time, and date of the Presentation	Will be intimated later to the technically qualified bidders.
7.0 Documents relating to Tender Fee, Bid Security, and Performance Security	
Tender Fee	Rs. 2500 (Rupees Two Thousand five hundred only) Nonrefundable.
Performance Security	5% of the contract value.
EMD	EMD Rs. 400000.00 (Rupees four lakh only)



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भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

Annexure – I

Scope of work and Technical Bid

Introduction - IIMU CRM, Admissions and Executive Education Administration Platform

Academic Programs:

IIMU conducts various programs broadly classified under:

1. Degree/Diploma Granting Programs
2. Executive Education Programs

Degree/Diploma Granting Programs

IIMU offers 5 degree granting programs. They are:

- Master of Business Administration: Two-year full-time MBA program
- Executive Master of Business Administration: Two year online Executive MBA program for working professionals
- One-year MBA in Global Supply Chain Management (GSCM) - One-year full-time MBA program
- One-year MBA in Digital Enterprise Management (DEM) - One-year full-time MBA program
- IIMU PhD Program: Full-time Doctoral Program (Around 5 years)

Executive Education Programs (ExEd)

IIM Udaipur offers open short-duration programs conducted at the campus and delivered in person. These residential programs are typically of 3 to 12 days duration and participants are expected to come to campus for learning.

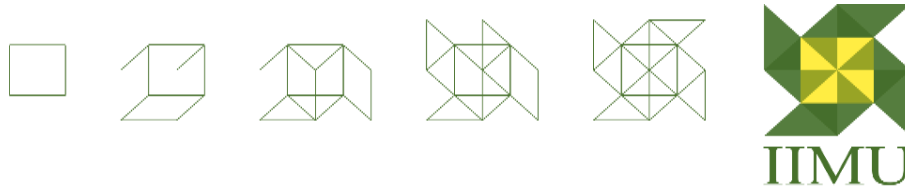
IIM Udaipur offers Government of India-sponsored and supported short-duration residential programs conducted at the campus. These in-person programs typically range from 3 to 12 days, allowing participants to immerse themselves in an intensive learning experience.

IIM Udaipur's blended/online long-duration programs are designed for working executives who are not able to take a break from their careers to pursue their academic aspirations. These certificate programs typically range in duration from 3 to 15 months.

IIMU also crafts programs tailored to your organization's specific objectives and goals. These are customized ExEd programs

Project and Objectives

IIMU has an operational, integrated ERP platform for Student life cycle (from Admissions to Graduation) and Finance Accounting systems.



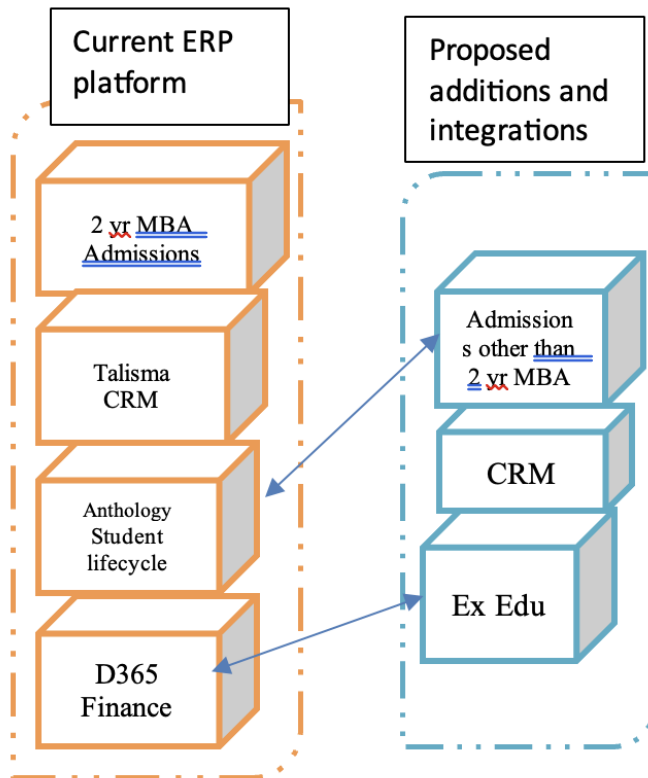
Owing to evolving business scenarios, the currently operational Admissions platform for non-flagship programs of IIMU needs to be significantly enhanced. Concurrently, expanding Executive Education programs require marketing and program administration platform support.

IIMU is looking for a cloud-based platform which can:

1. replace the currently running Admissions functionality with a Higher Ed focused CRM with flexibility for managing Admissions processes of diverse programs
2. In the ExEd area, cater to the Programs marketing with CRM, Program definition, administration, billing and program closure, both in student-paid model and corporate-sponsored model (partial batch sponsorship model and fully sponsored custom programs)
3. Effectively integrate with the current ERP Student Information System (SIS)
4. Integrate with the Finance System conforming to all statutory taxation and other compliance requirements
5. Actionable BI, dashboards and reports based on information pulled from multiple, disparate underlying systems
6. Have a scalable approach to build customizations, custom processes and innovations

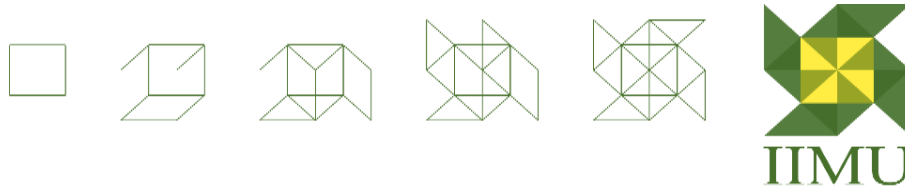
The bidder should have proven experience and knowledge of implementing such systems in Indian higher education sector.

Current Platform and Proposed additions and integrations representation



The expectations from the proposed additions and integrations are listed below:

- Ability to support Institute Policy, Planning & Operational decisions in Admissions and ExEd



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

functions

- Work-flow management
- Role based access to data and processes, and data and transaction segregation for Admissions and ExEd functions
- Flexibility to adapt / tweak process flows and application forms with configurable options
- Audit Trail
- Safe, quick and dependable back-up and restore to overcome mishaps
- Disaster Recovery with geographically separated data centers
- Multiple category Report generation (Transactional, MIS, Analytical etc.)
- Query tool
- Document Exchange to and from Office productivity tools
- Spreadsheet Data Import/Export of all data
- APIs for process orchestration, application integration and extensions
- Tools for customization/application/process development
- Single sign-on with Microsoft Azure Active Directory of IIMU
- Payment gateway integration
- Cloud Monitoring tools
- Secure HTTP : https/SSL implementation
- Mobility for participant/applicant experience, experience of other stakeholders like operations users, faculty, interviewers etc.
- Data migration tools

Additional Information on Custom Modules and Integrations

The bidders are requested to go through the detailed functionalities (Refer to annexure XIII) and determine if these custom modules and integrations are available out of the box in the proposed platform, or if they need to be built. For all purposes of technical consideration and financial estimation, the integrations need to be assumed to be automated and run through the cloud platform to be provided by the bidder. The bidders are expected to add to the list and estimates, any interface between modules/products being provided as part of the response if these integrations and customizations do not come out-of-the- box.

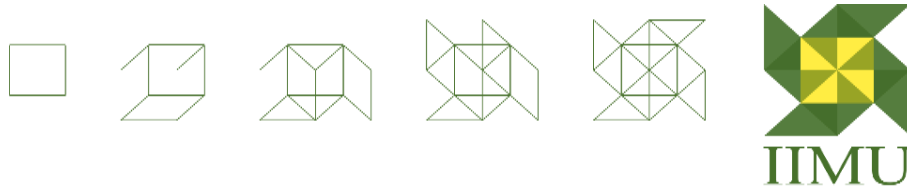
Scope of Work

Bidders are required to refer the **Annexure XIII** for detailed functionalities of scope of work.

Broad Scope

The scope of work broadly includes:

1. Perform Detailed Requirements Analysis, Gap Analysis, Future State Process Definition
2. Developing a blueprint and implementation timeline including
 - a. Implementation Roadmap
 - b. Approach to minimize customizations and maximize adoption.
 - c. Proposed Process Implementation strategies including process decomposition to a detailed level including identification of gaps and their resolution as configuration/out-of-the box items and development items (further as front-end/back-end/process extension, customization, report,



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

- integration, data migration etc.)
- d. Integration Strategy
 - e. Data Migration and Archival Strategy, Reporting and Analytics Strategy
 - f. Detailed Project Plan
3. Supplying suitable integrated software systems, that have the proven capability of meeting all requirements
 4. Provide and setup the Cloud Infrastructure/Platform and Tools across IaaS, PaaS and SaaS required for IIMU's solution including the proposed product(s), Customizations, Extensions, Reporting, Workflows and Integrations. There is a preference towards mature low code platforms.
 5. Process Change Management & Driving Adoption: Adopting / Designing / retaining work processes depending upon their acceptability to the users, by undertaking Gap analysis between the current work processes and the proposed work processes and documentation of finalized processes including visual process flows.
 6. Data Migration from current Admissions platform and Archival
 7. Development of Customizations, Extensions, Integrations, Reporting, Workflows to resolve the identified gaps, including suitable, simple user interfaces to enable smooth transition to the new system to carry out the required work processes
 8. Evolving suitable plan for user training and technical training; test data preparation and solution validation; solution acceptance by users; go-live preparation and for going live.
 9. Technical & User documentation preparation to reflect the specifics of IIMU's solution
 10. Testing Management: Management, documentation and reporting of all testing and test cycles.
 11. Warranty, Maintenance & Ongoing support to enable IIMU to adapt to the system, stabilize it, and make it a dependable tool for deriving continuous business benefits
 12. Process and Tools: The bidder is expected to bring in any process and tools expected for full delivery of the scope of work. Should there be a cost involved for the institute to bear, the same should be included in the financial offer.
 13. Project Management & Governance

Specific Scope

Supply of 'IIMU CRM, Admissions and Executive Education Administration'

- Supply of 'IIMU CRM, Admissions and Executive Education Administration' Software Product / Package that fully meets IIMU's requirements as stated in the previous section, along with Licenses, Technical & User Documentation
- Third party software, if supplied, should be seamlessly integrated with the supplier's package
- Sizing and Supply of suitable cloud infrastructure for production & operational systems for efficient running of the software package, as customized for IIMU
- Supply of the highly available cloud infrastructure and platform to support the system and the customizations/extensions.
- Provide suitable performance Service Level Agreements (SLAs) that will meet the requirements of IIMU

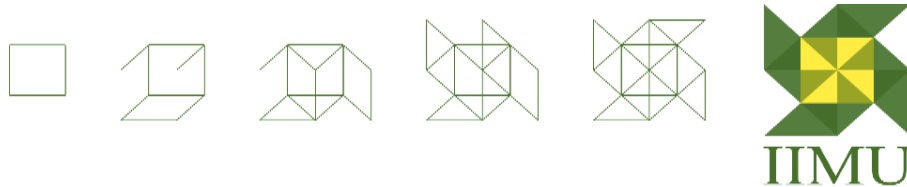
Adoption of Package

- Prepare detailed implementation plan, with LIVE Deployment and Operations target of **6 months**

Signature of Bidder
HOD

Page 10 of 61

Signature of



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

from the date of the award of contract

- Adopt best practices used by leading higher-education institutions, keeping in perspective change management issues
- Define processes and segregation of duties
- Review and minimize customizations
- Customize the Software product to meet IIMU's requirements, considering best practices followed by reputed institutions in the domain of Higher Education & Research
- Retain, or redesign for efficiency, processes that are unique to IIMU, as well as those that pertain to statutory and regulatory requirements; and customize package to achieve this functionality
- Prepare Implementation Project Management plan specifying clearly the deliverables, responsibilities, sign-offs, with strict adherence to delivery dates
- Evolve monitoring mechanism form continuous evaluation of the implementation effort.
- Report weekly project status, risks, actions and decisions and to IIMU's Management
- Training of core team members and different category of users
- Equip core team members with capability to become change agents for successful implementation of the solution
- Arrange for one-time data migration from existing Admission databases, files and manual records, after getting approval of IIMU for the methodology adopted, ensuring data integrity.
- Guide respective users of IIMU in the preparation & maintenance Master data management
- Preparation of comprehensive test data and usage scenarios and anticipated results / outcome, in association with IIMU
- Demonstration of the customized and suitably configured solution to obtain End-User acceptance
- Provide documentation pertaining to Policies, System Administration, Testing, User manuals and operational manual (Softcopies & two sets of hard copies)
- Implement the IIMU solution

Infusion & Routinization of IIMU solution

- Evolve Policies and Scripts and demonstrate their effectiveness in respect of:
 - System Administration
 - Cloud Infrastructure & Platform Administration including Performance & Health Monitoring and Management
 - Data & Access Security with single sign on
 - Data Integrity
 - Data Backup
 - Disaster Management & Recovery allowing for geographically separated stand-by nodes
 - Periodic data archival
 - Governance around Development of Integrations, Customizations and Extensions

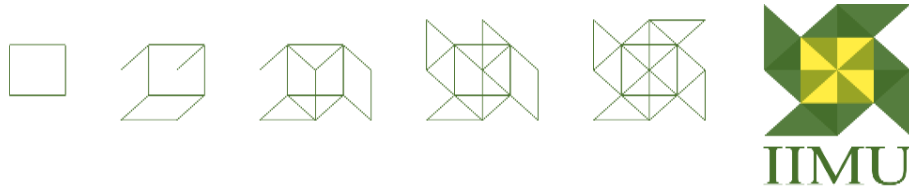
Performance Management

Specify performance monitoring parameters and train our operations personnel in measuring performance and fine tuning on an ongoing basis

Signature of Bidder
HOD

Page 11 of 61

Signature of



भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

Warranty and Ongoing Support for the Software product and customization that has been carried out to meet IIMU's requirement:

- Provide Warranty Period/Hypercare Product and Solution Support
- Provide Post Hypercare IIMU's Solution Maintenance, Ongoing Support and Enhancement development (Managed Services)

Application Users/License Metrics

The section covers the number of application users and license metrics for consideration.

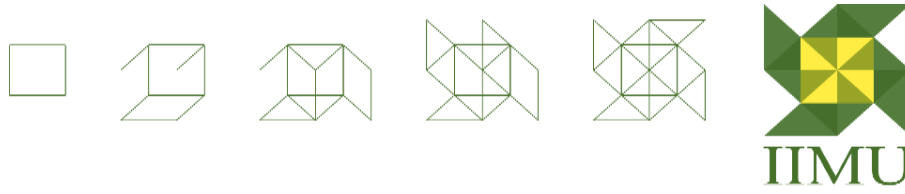
Note: These numbers may change (either increase or decrease), hence provide flexibility to increase/decrease user base. Please provide details of incremental costs.

Invitation for Bid

This "invitation for bids" is for acquiring and implementation of 'IIMU CRM, Admissions and Executive Education Administration' business solution for IIMU for the areas mentioned / listed in subsequent sections. Responses prepared in accordance with the procedures enumerated in this document should be submitted to IIMU by the announced deadlines.

Due Diligence

The Bidder is expected to and shall be deemed to have examined all instructions, forms, terms and specifications in this document. The bid should be precise, complete and in the prescribed format as per the requirements mentioned in Annexure XIII. Failure to furnish all information required or submission of a bid not responsive to the tender in every respect will be at the Bidder's risk and may result in rejection of the bid. IIMU shall at its sole discretion be entitled to determine the adequacy / sufficiency of the information provided by the Bidder.

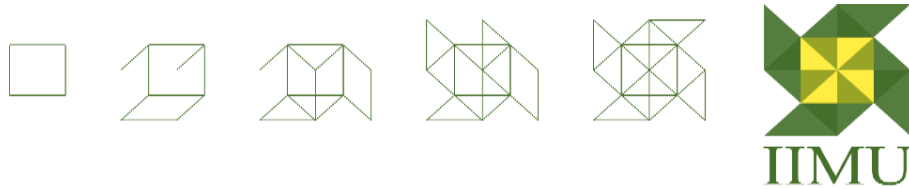


भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

Annexure – II

GENERAL TERMS AND CONDITIONS OF THE CONTRACT

- (1) **Preparation and submission of Tender:** The tender should be submitted in two parts i.e. Technical Bid and Financial Bid. For submission of bids, all interested bidders have to register online on the e-procurement portal. After registration, bidders shall submit their Technical Bid and Financial Bid documents online at <https://eprocure.gov.in/cppp/> duly signed and sealed on each page of the Tender. For details, kindly see the annexure of this tender: Instructions for Online Bid Submission.
- (2) **Period of Contract:** The contract period will initially be for 5 years. The contract may be extended annually at the sole discretion of IIMU. In case the performance of the agency is found to be unsatisfactory as per operational parameters set out in the contract or is not in conformity with the terms & conditions of the tender, then the contract may be terminated by IIMU even before the scheduled time by giving advance notice of one month to this effect. In the event of premature termination of the contract for reasons mentioned herein above, the Performance Bank Guarantee shall be forfeited.
- (3) **Exit Clause:** Notwithstanding anything contained in any other clause of this tender, the contract can be terminated by IIMU and by the agency as per the mutually agreed terms & conditions.
- (4) **Contract Agreement:** The successful bidder shall be bound to execute an agreement on non-judicial stamp paper of Rs. 1500/- (Rupees Fifteen Hundred only). IIMU reserves the right to amend the terms & conditions of the contract by mutual discussions and such amendments shall be in writing. The amended terms and conditions will form part of the agreement.
- (5) **Tender Fee:** The tenderer shall deposit a Non-refundable Tender as mentioned in the TIS (Tender information summary) through a Demand Draft drawn in favor of “Indian Institute of Management Udaipur” payable at Udaipur.
- (6) **Earnest Money Deposit (EMD):** The tenderer shall deposit Earnest Money as mentioned in the TIS (Tender information summary) through a Demand Draft drawn in favor of “Indian Institute of Management Udaipur” payable at Udaipur. The Earnest Money Deposit will be refunded to the tenderers whose offers have not been accepted. The Earnest Money Deposit of the tenderer whose offer is accepted will be kept until such time that the Performance Bank Guarantee is received.
- (7) **Performance Bank Guarantee:** The successful tenderer will have to deposit a Bank Guarantee for an amount of 5% of the contracted value in favor of “**Indian Institute of Management Udaipur**” payable at Udaipur drawn on any scheduled Bank before signing of the contract and valid for 60 days beyond the expiry period of contract. In case the tenderer fails to deposit the requisite performance guarantee the EMD furnished by the tenderer shall be forfeited without any further notice to the tenderer.



भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

- (8) In the event of a bidder backing out before the actual award or execution of the agreement, IIMU will have the right to forfeit the EMD. In case the successful tenderer declines the offer of contract, for whatsoever reason(s) his EMD will be forfeited.
- (9) The Institute will not provide any residential space for accommodation to the agency. The agency has to make its own arrangements for the residential accommodation to the deployed staff.
- (10) In the case of the first lowest is more than one, then it would be at the discretion of the Institute to decide the H-1. In the event two or more bids have the same score in final ranking, the bid with higher technical score will be H-1.
- (11) **Interpretation:** All the terms and conditions of the contract shall be read in conjunction with all other documents forming part of this contract. Notwithstanding the subdivisions of the documents into these separate sections, every part of which shall be deemed to be supplementary to and complementary of every part and shall be read with and into the contract.
- (12) **Bid Validity:** The quoted rates must be valid for a period for 90 days from the date of closing of the tender. The overall offer for the assignment and bidder(s) quoted price shall remain unchanged during the period of validity. If the bidder quoted a validity shorter than the required period, the same will be treated as unresponsive and it may be rejected.
- (13) **Cost of Bidding:** The Bidder shall bear all costs associated with the preparation and submission of its bid and IIMU shall in no event or circumstance be held responsible or liable for these costs, regardless of the conduct or outcome of the bidding process.
- (14) **Amendment of Document:** At any time before the deadline for submission of bids, IIMU may, for any reason, whether at its own initiative or in response to a clarification requested by a prospective Bidder, modify the Document by amending, modifying and/or supplementing the same.
- (15) **Timelines for implementation and Penalty for delay:** The deployment of 'IIMU CRM, Admissions and Executive Education Administration' Software Product / Package has been logically grouped into functionality phases based on the start dates of the academic activities. The fully implemented platform has to be ready for LIVE operations by this date, without fail. Bidders are expected to work backwards from these dates to estimate the timelines by which the platform for each phase has to be made available for UAT in staging environment. Also, for phases with Go-LIVE beyond 6 months from date of signing of contract, **Bidders are expected to complete the implementation within 6 months.**

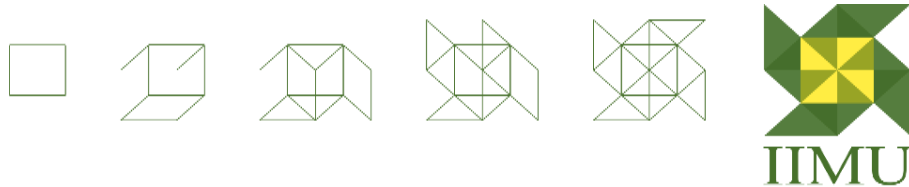
Refer the Annexure XIII for the grouping of functionalities expected to go LIVE under each phase.

Phase	Expected date for LIVE operations	Penalty for delay
Admissions Phase 1(Adm-P1)	June 1, 2025	10% of the quoted implementation cost for each phase
Admissions Phase 2(Adm-P2)	August 1, 2025	
Admissions Phase 3(Adm-P3)	September 1, 2025	

Signature of Bidder
HOD

Page 14 of 61

Signature of



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

ExEd Phase 1 (ExEd-P1)	September 1, 2025	
ExEd Phase 2 (ExEd-P2)	December 1, 2025	
Admissions Phase 4(Adm-P4) and ExEd Phase 3 (ExEd-P3)	To be decided	Not applicable

(16) In case the tenderer withdraws, modifies, or changes his offer during the validity period, the bid is liable to be rejected and the earnest money deposit shall be forfeited without assigning any reason thereof. The tenderer should also be ready to extend the validity, if required, without changing any terms, conditions, etc. of their original tender.

(17) In exceptional circumstances, the IIMU may request the bidder's consent for an extension of the period of bid validity. A bidder shall, however, be at liberty to refuse the request without risking forfeiture of his earnest money. A bidder agreeing to extend the validity of the bid will not be allowed to modify his bid.

(18) Anyone or more of the following actions/commissions / omissions are liable to cause summary rejection of tender:

- Any BID/EMD received late without conclusive proof that it was delivered before the specified closing time.
- Any conditional bid or bid offering rebate.
- Any bid in which rates have not been quoted in accordance with specified formats / details as specified in the Bid Documents.
- Any effort by a bidder to influence the IIMU in the bid evaluation, bid comparison or contract award decision.

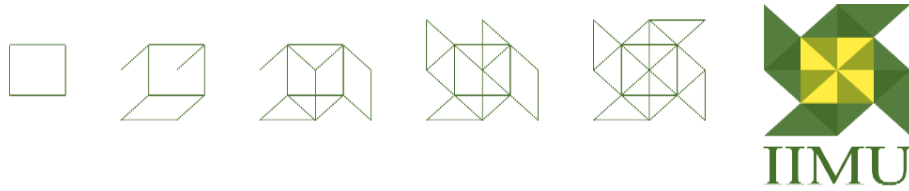
(19) **Authority of person signing document:** A person signing the tender form or any documents forming part of the contract on behalf of another shall be deemed to warrant, that he has authority to bind such other and if, on enquiry, it appears that the person so signing had no authority to do so, the IIMU may without prejudice to other civil and criminal remedies cancel the contract and hold the signatory liable for all cost and damages.

(20) **Payment terms:**

1. One time implementation cost payable in tranches based on Go-Live of phases mentioned in para 15.
2. Payment terms of Annual maintenance cost will be discussed with the Bidder after the Financial bid is opened and the Bidder's proposed payment schedule is reviewed by the committee.

(21) **ARBITRATION:**

Except as otherwise provided elsewhere in the contract, if any dispute, difference, question or disagreement or matter whatsoever, shall, before / after completion or abandonment of work or during extended period, hereafter arises between the parties, as to the meaning, operation or effect of the



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

contract or out of or relating to the contract or breach thereof, shall be referred to a Sole Arbitrator to be appointed by IIMU.

If the arbitrator to whom the matter is originally referred dies or refuses to act or resigns / withdraws for any reason from the position of arbitration, it shall be lawful for the IIMU to appoint another person to act as Arbitrator in the manner aforesaid. Such person shall be entitled to proceed with reference from the stage at which his predecessor left it, if both the parties consent to this effect, failing which the Arbitrator shall be entitled to precede denovo.

It is a term of the contract that the party invoking arbitration shall specify all disputes to be referred to the Arbitrator at the time of invocation of arbitration under this clause. It is also the term of the contract that the cost of arbitration shall be borne by the parties themselves.

The venue of arbitration shall invariably be at Udaipur.

Subject as aforesaid, the provisions of the Arbitration and Conciliation Act 1996 and any statutory modifications or re-enactment thereof or rules made there under and for the time being in force shall apply to the arbitration proceedings under this clause.

(22) **FORCE MAJURE:** -

If at any time, during the continuance of this contract, the performance in whole or in part by either party, of any obligation under this contract, shall be prevented or delayed by reason of any floods, explosions, epidemics, quarantine restriction or act of God (hereinafter referred to as events), provided notice of happenings of any such eventuality is given by either party within 7 days from the date of occurrence thereof, neither party shall be due to reason of such event be entitled to terminate this contract nor shall either party have any such claim for damages against the other in respect of such non-performance or delay in performance. The operation of the contract shall be resumed as soon as practicable after such event may come to an end or cease to exist and the decision of the IIMU as to whether the operation has been so resumed or not shall be final and conclusive, provided further that if the performance in whole or in part of any obligation under his contract is prevented or delayed by reason of any such event for a period exceeding 90 days either party may at his option terminate the contract.

(23) **PENALTY**

Penalties for complaint, non-adherence of terms & conditions specified in the tender document, indiscipline & unsatisfactory operation of the services, and the incidence given in the various clauses of this document for the purpose, may be levied up to Rs. 1,00,000/- on each occasion as per IIMU discretion which will be deducted/adjusted in subsequent monthly bill/security deposit/ performance guarantee.

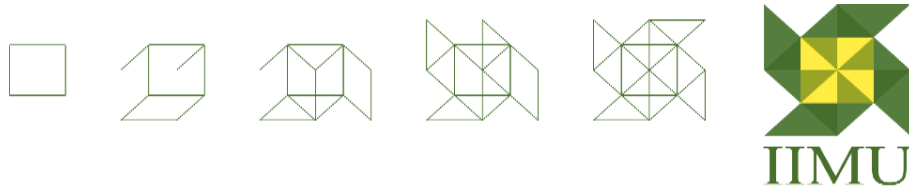
(24) **Feedback:** IIMU may ask the agency to submit monthly feedback collected from the users. Based on feedback, IIMU may at its own discretion impose financial penalty as per the penalty clause of General Terms & Conditions depending on the gravity of the issue and in case of similar repetition IIMU can cancel the contract unilaterally without notice, and the bank guarantee will be forfeited.

(25) IIMU reserves the right to withdraw/relax/modify any of the terms and conditions mentioned

Signature of Bidder
HOD

Page 16 of 61

Signature of



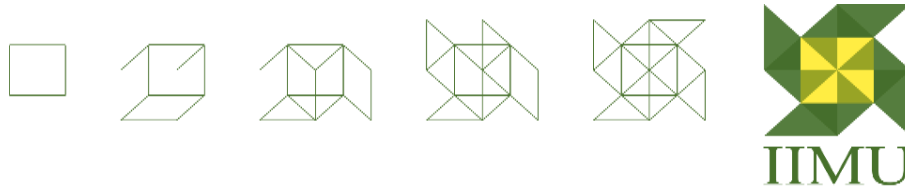
भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

in the tender document if it is felt necessary for the benefit of the IIMU.

(26) All exhibits/certificates/statements/supporting documents should be indexed serially page numbered.

(27) The decision of the Director of IIMU will be final in all respects and will be acceptable to all the tenderers.

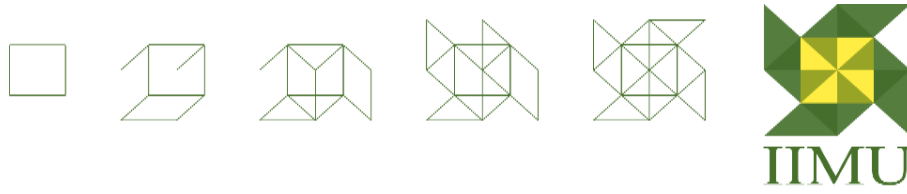
(28) **Jurisdiction:** All matters and disputes arising out of this agreement will be subject to the jurisdiction of the courts located at Udaipur only.



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

ADDITIONAL TERMS AND CONDITIONS FOR THE FINANCIAL BID

Sl.	<u>Additional terms and conditions</u>
1	Rates are to be given in Indian rupees (INR) only inclusive of all taxes/levies/charges but exclusive of GST. GST will be paid extra as applicable.
2	Income Tax (TDS) and GST (TDS), if applicable, will be deducted at source as per the Rules.
3	The agency must bid for all the sections/items mentioned in the tender document. The tender document shall be considered invalid for partial bidding or non-bidding of any section/item.
4	All services shall be carried out as per the details in the technical bid (Part - I) and finance bid (Part - II) of this tender.
5	Implementation and setup fees quoted should be inclusive of all the anticipated cost to be incurred on the team proposed to be deployed for implementation. No extra shall be paid on account of any out-of-pocket expenses.
6	All prices shall be for delivery of services at IIMU's premises up to the satisfaction of IIMU or their representatives (if any). The aggregated price should be quoted in words also.



Annexure - III

AGENCY DETAILS

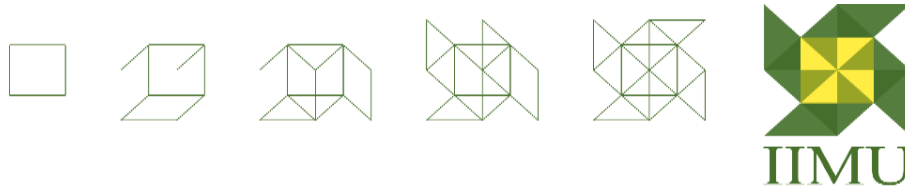
Sl.	Particulars	Details
1	Name of Tendering Agency	
2	Name of the Proprietor / Director / Partner	
3	Full Address of registered office with pin code, Telephone Number	
4	E-mail ID of the agency	
5	Website of the agency, if any	
6	Telephone No. (Office) of five top officials with name, designation and E-mail ID	
7	Name and designation of authorized person with telephone/mobile number (Authorization letter to be enclosed)	

Certified that all above information is correct to the best of my/our information, knowledge, and belief. All the attached relevant documents are duly signed, sealed, and serially numbered.

Place:

Date:

(Signature of the bidder with seal)



INSTRUCTIONS FOR ONLINE BID SUBMISSION

Instructions to the Bidders to submit the bids online through the Central Public Procurement Portal for e Procurement at <http://eprocure.gov.in/eprocure/app>

1. SUBMISSION OF TENDER

1) Bidders should log into the site well in advance for bid submission so that they can upload the bid in time i.e. on or before the bid submission time. Bidder will be responsible for any delay due to other issues.

2) The bidder must digitally sign and upload the required bid documents one by one as indicated in the tender document.

3) Bidders are requested to note that they should necessarily submit their financial bids in the format provided and no other format is acceptable. If the price bid has been given as a standard BoQ format with the tender document, then the same is to be downloaded and to be filled by all the bidders. Bidders are required to download the BoQ file, open it and complete the white-colored (unprotected) cells with their respective financial quotes and other details (such as the name of the bidder). No other cells should be changed. Once the details have been completed, the bidder should save it and submit it online, without changing the filename. If the BoQ file is found to be modified by the bidder, the bid will be rejected.

4) The server time (which is displayed on the bidders' dashboard) will be considered as the standard time for referencing the deadlines for submission of the bids by the bidders, opening of bids etc. The bidders should follow this time during bid submission.

5) All the documents being submitted by the bidders would be encrypted using PKI encryption techniques to ensure the secrecy of the data. The data entered cannot be viewed by unauthorized persons until the time of bid opening. The confidentiality of the bids is maintained using the secured Socket Layer 128 bit encryption technology. Data storage encryption of sensitive fields is done. Any bid document that is uploaded to the server is subjected to symmetric encryption using a system generated symmetric key. Further this key is subjected to asymmetric encryption using buyers/bid opener's public keys. Overall, the uploaded tender documents become readable only after the tender opening by the authorized bid openers.

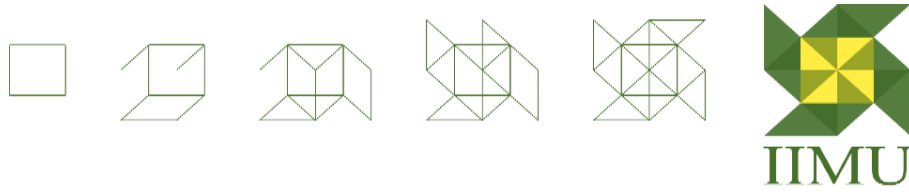
6) The uploaded tender documents become readable only after the tender opening by the authorized bid openers.

7) Upon the successful and timely submission of bids (i.e. after Clicking "Freeze Bid Submission" in the portal), the portal will give a successful bid submission message & a bid summary will be displayed with the bid no. and the date & time of submission of the bid with all other relevant details.

8) The bid summary has to be printed and kept as an acknowledgment of the submission of the bid. This acknowledgment may be used as an entry pass for any bid opening meetings.

9) Any queries relating to the tender document and the terms and conditions contained therein should be addressed to the Tender Inviting Authority for a tender or the relevant contact person indicated in the tender.

10) Any queries relating to the process of online bid submission or queries relating to CPP Portal in general may be directed to the 24x7 CPP Portal Helpdesk.



भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

11) The Agencies are requested to submit the bids through online e-tendering system to the Tender Inviting Authority (TIA) well before the bid submission end date & time (as per Server System Clock). The **TIA will** not be held responsible for any sort of delay or the difficulties faced during the submission of bid online by the Agencies at the eleventh hour.

12) Not more than one tender shall be submitted by one Agency or Agencies having a business relationship. Under no circumstance will the father and his son(s) or other close relations who have a business relationship with one another (i.e. when one or more partner(s)/director(s) are common) be allowed to tender for the same contract as separate competitors. A breach of this condition will render the tenders of both parties liable to rejection.

13) Bidder who has downloaded the tender from the IIMU website www.iimu.ac.in and Central Public Procurement Portal (CPPP) website <https://eprocure.gov.in/eprocure/app> **shall not alter/modify the tender form including downloaded price bid template in any manner**. In case the same is found to be altered/ modified in any manner, the tender will be completely rejected and EMD will be forfeited, and Bidder is liable to be banned from doing business with IIMU.

2. BID EVALUATION

The bid will be evaluated as per the following steps:

Step 1. Evaluation of tender fees and EMD and pre-qualification criteria as per Annexure V. Only those bidders who qualify the step 1 will be eligible for evaluation for the next step.

Step 2. Evaluation of technical bid as per Annexure VI. Only those agencies that meet the pre-qualification conditions will be considered for the technical evaluation. The technical evaluation will be performed in 2 parts as mentioned below:

Part 1. As per Annexure XII

Part 2. As per the evaluation of the presentation by the bidder.

Step 3. Evaluation of financial bid.

The lowest bidder will be selected using the Quality-And-Cost-Based Selection (QCBS) method. The technical bid will have a weightage of 60% and the financial bid weightage of 40%.

Technical Score: See Annexure VI for the criteria and the scoring scheme.

Financial Score: The lowest financial bid (FM) will be given a Financial Score (FS) of 100 points.

The Financial Score (FS) of other financial bids will be computed as per the following formula:

$$FS=100 \times FM/FO$$

Where, FM = Lowest Financial Bid, FO = Financial Bids of the bidder, FS=Financial Score.

$$TSO \text{ (Total Score Obtained)} = 60\% \text{ of the Technical Score} + 40\% \text{ of the Financial Score}$$

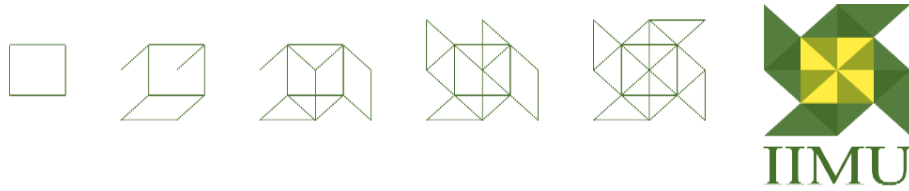
Step 4. Final Selection

A. On the basis of the combined weighted score for Technical Bid and Financial Bid, the qualified

Signature of Bidder
HOD

Page 21 of 61

Signature of



भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

Bidders shall be ranked in terms of the total score obtained (TSO). The proposal obtaining the highest total combined score in evaluation of Technical Bid and Financial Bid will be ranked as H-1 followed by the proposals securing lesser marks as H-2, H-3 etc. The proposal securing the highest combined marks and ranked H-1 will be invited for negotiation, if required and shall be recommended for Award of Contract.

B. In the event two or more bids have the same score (TSO) in final ranking, the bid with highest technical score will be H-1.

Special clause for ERP Selection Committee for special discretion?

3. TENDER OPENING PROCEDURE

The tender will be opened online on the Central Public Procurement Portal (CPP Portal).

4. CLARIFICATION ON TENDER EVALUATION

4.1 The Tender shall be evaluated based on the available documents submitted by the tenderer.

4.2 The Client also reserves the right to seek confirmation/ clarification on the supporting documents submitted by the tenderer.

5. RIGHT OF ACCEPTANCE

5.1 Office of Director, IIM Udaipur, Rajasthan reserves all rights to reject any tender including of those tenderer's who fail to comply with the instructions without assigning any reason whatsoever and does not bind itself to accept the lowest or any specific tender. The decision of the Competent Authority in this regard shall be final and binding.

5.2 Any failure on the part of the Tenderer to observe the prescribed procedure and any attempt to canvass shall render the Tenderer liable for rejection.

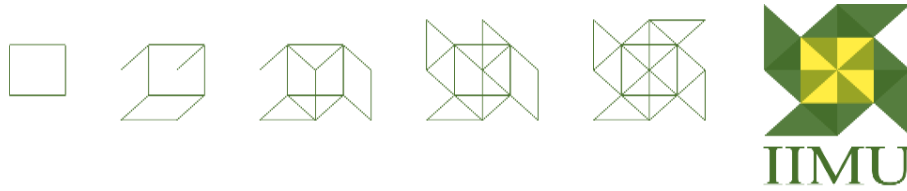
5.3 The Competent Authority reserves the right to award any or part or full contract to any successful tenderers at its discretion and this will be binding on the Tenderer's.

5.4 The Office of Director, IIM Udaipur, may terminate the contract if it is found at any stage that the Contractor is blacklisted on a previous occasion by any institution.

6. LETTER OF ACCEPTANCE

6.1 After determining the successful evaluated Tenderer, Client shall issue a Letter of Acceptance (LoA) in duplicate, who will return one copy to the client duly acknowledged, accepted, and signed by the authorized signatory, within 3 days of receipt of the same by him.

6.2 The issuance of the Letter of Acceptance to the Tenderer shall constitute an integral part of the contract and it will be binding on the contractor



Pre-Qualifications Conditions

Only those agencies/service providers that meet the following Pre-Qualifications Conditions will be considered for the technical qualification. Supporting documents/ annexures should be attached with this and must be serially numbered. An Index must be made for this to facilitate quick reference to the relevant page number.

Pre-Qualification of the Bidder and Proposed solution:

An “organization”, which is the principal developer and owner of the proposed ‘IIMU CRM, Admissions and Executive Education Administration Platform’ solution, will bid independently and bring in their Implementation, Maintenance and Ongoing Support Team.

Please note that we will only consider proposals where the product bidder takes the total responsibility for entire project including Software product, product maintenance, Implementation and warranty and post implementation support through five years from the start of the implementation. We will enter into agreement / contract for all these only with the product bidder.

The bidder or the partner shall not have been blacklisted by any State or Central Government undertaking in India.

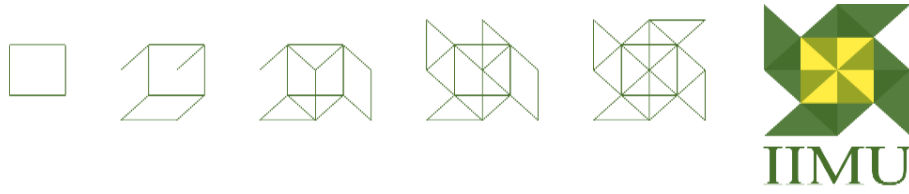
A bidder is one who has responded to the tender for supply, installation, implementation, testing, integration, commissioning, Maintenance & Ongoing Support of the ‘IIMU CRM, Admissions and Executive Education Administration Platform’ Solution. The Bidder shall be responsible for the total project in all its dimensions.

In the event of any additional information required by IIMU other than that specified in the pre-qualification criteria, the Bidder shall duly submit such information within the prescribed time to IIMU.

The Bidder shall submit the original tender document duly signed on each page as a part of the bid. It shall be expressly agreed herein by the bidder/authorized signatory that he/she has read and understood the complete tender document.

To qualify as a bidder, the following requirements need to be met:

- The bidder should be an entity who will own full responsibility of providing the application, the infrastructure, the customization platform and a query-able data store for historical data, all on the self-owned cloud, and will own fully responsibility of the implementation. The bidder shall not sub-contract the implementation of their product to other bidders or use sub-contractor resources for the same.
- The bidder should have demonstrated experience in cloud across application, platform and infrastructure.
- The bidder’s ERP product should have extensibility for client specific process requirements and with reference implementations in India.



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

- The bidder should have at least 2 reference installations in the higher education space (educational institutes with Bachelors and Masters, and/or Doctoral Programs, and Executive Education program offerings) inside or outside India, and in each installation, student / participant combined strength should be more than 1000.
- The bidder should have at least 4 years of presence within the higher education sector.
- The bidder should have an average annual turnover of more than Rs. 10 cr. for the last three financial years ended on 31.03.2024 through their product offerings in CRM, Admissions and ExEd.
- The bidder must have a minimum of **50 regular employees** on their payroll. A self-undertaking from the bidder required.
- The bidder shall have a support center in India and provide the details.

Only those bidders that meet ALL the above Pre-Qualifications Conditions will be considered for the technical qualification. Supporting documents/ annexures should be attached with this and must be serially numbered. An Index must be made for this to facilitate quick reference to the relevant page number.

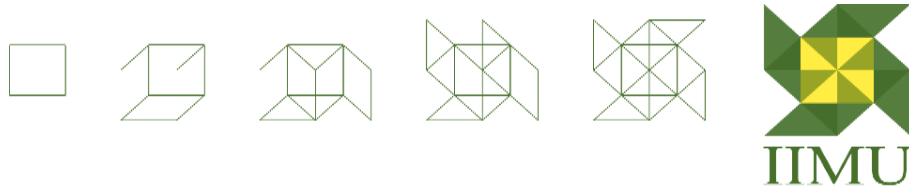
(1) The agency/Service provider should be a registered company and have business expertise in **providing ERP platform/solutions for higher educational institutions**. Proven track record of providing solutions/services specifically in Admissions and Executive Education areas covered under this tender, would be an added advantage. Appropriate documents/certificates issued from appropriate authorities should be enclosed to support this along with the format given below.

SL No	Registration Number	Registration Issued By	Registration From (DD/MM/YYYY)	Validity To (DD/MM/YYYY)	Registration Validity To (DD/MM/YYYY)	Page No. of Copy attached

(2) The agency/Service provider should have a valid Indian Permanent Account (PAN) and GST No. as per the details given below: -

	Name	Copy attached	Remarks
PAN No.			
GST No.			

(3) The agency/Service provider must have turnover of Rs. **2 Crore** per annum from ERP related services only in each of the last three financial years ended on 31.03.2024. The agency should provide the following documentary evidence duly certified by CA in the following formats (**Annexure X**):



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

<u>Financial Year</u>	<u>Turnover Rupees (in words and figures) from ERP related services only</u>
2021-22	
2022-23	
2023-24	

(4) The Agency must have experience of successfully completing/operating at least one single contract from a single customer/ entity having project / contract value not less than Rupees 75 lakh (implementation cost) in functional areas **related to ERP Platform for Admissions and/ or Executive Education** in each of the last three financial years ended on 31.03.2024. The agency should provide the following documentary evidence duly certified by CA in the following formats (**Annexure XI**):

<u>Financial Year</u>	<u>Name of the Customer/ Entity (up to 3)</u>	<u>Project Value/ Contract value</u>	<u>Page Number of the relevant Attachment *</u>
2021-22			
2022-23			
2023-24			

* - Attach relevant page (s) of agreement showing the Project value.

(5) The Agency must have a minimum of **50 regular employees** on their payroll on the last day of submission of the bid. A self-undertaking on company letterhead from the bidder required.

(6) The agency shall submit the original EMD and tender fee in a sealed envelope super scribing this tender name & the name of the agency and must reach at IIMU before the last date & time for receipt of the Bid. A photocopy of the same EMD and tender fee should be enclosed to support this along with the format given below.

S. No.	Type of Fee	Details
1	Tender Fee	DD No. _____ of Rs. 2500 (Rupees Two thousand five Hundred only) of Dated _____ drawn on Bank _____ Branch _____
2	Earnest Money Deposit (EMD)	DD No. _____ of Rs. 400000.00 (Rupees Four lakh only) of Dated _____ drawn on Bank _____ Branch _____

DD will be made in favour of “Indian Institute of Management Udaipur” payable at Udaipur.

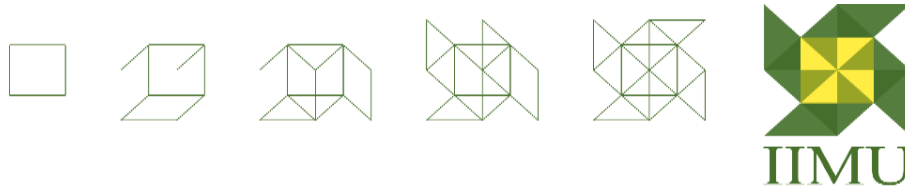
(7) The service provider should have relevant security and quality certifications from recognized agencies, and it should be valid on the last date for submission of Tender:

S No.	Certificate No.	Certification	Certificate Valid up (dd/mm/yyyy)	Page No. of copy attached

Signature of Bidder
HOD

Page 25 of 61

Signature of



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

(8) There should be no case pending with the police against the Proprietor/Firm /Partner or the Company (agency) and should not be blacklisted by any Govt agency. A self-undertaking to this effect on the agency's letterhead should be attached.

(To be provided on letterhead of the Firm/LLP)

Declaration regarding Blacklisting

To, Director,
IIM Udaipur,
Balicha, Udaipur 313001

Tender Reference No.

Name of Work/ Service: -

I hereby certify that our firm (name) has never been blacklisted or debarred or disqualified in the past by any Central/State Government/Public Undertaking/Autonomous Institute/ any International/National agency from taking part in tenders or for corrupt or fraudulent practices nor any criminal case is pending against the firm/LLP or its owner/partners anywhere in India.

I also certify that the above information is true and correct in every respect, and in any case, at a later date, it is found that any details provided above are incorrect, any contract given to our firm/LLP (name) may be summarily terminated, and the firm/LLP blacklisted.

Date :

Firm Name:

Place:

Name of the authorized person:

(9) The agency should possess all mandatory statutory requirements mentioned in **Annexure-III (Agency Details)** in this tender document.

No price should be specified in the technical bid, including such information will entail rejection of the bid.

NOTE: All third-party certificates should be duly signed and stamped by the bidding agency.

Certified that all above information is correct to the best of my/our information, knowledge, and belief. All the attached relevant documents are duly signed, sealed, and serially numbered.

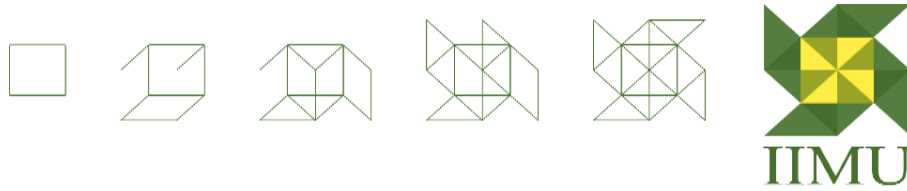
Place:

Date:

(Signature of the bidder with seal)

Signature of Bidder
HOD

Signature of



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

Annexure – VI

Technical Bid Evaluation

Only those agencies that meet the pre-qualification conditions will be considered for the technical evaluation. Supporting documents/annexures should be attached with this and must be serially numbered. An Index must be made for this to facilitate quick reference to the relevant page number.

Overall Evaluation Methodology

IIMU shall evaluate and compare the bids determined to be substantially responsive. Any effort made by the Bidder to influence the IIMU in the evaluation/contract award decision may result in the rejection of the Bidder's bid. It is IIMU's intent to select the Bid that is most advantageous to IIMU, and each Bid will be evaluated using the criteria and process outlined below.

The Technical and Commercial evaluation of Bids shall be carried out by the IIMU using a Quality and cost-based system.

Evaluation of Bids

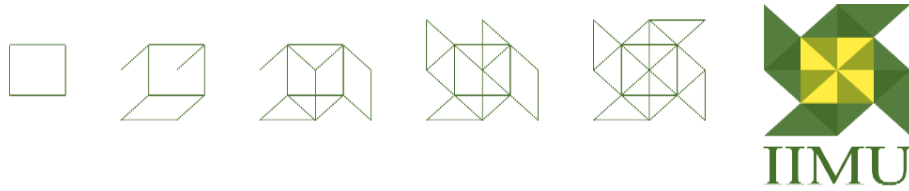
Important points to note regarding the evaluation of bids:

- Prior to the detailed evaluation of the Technical Bids, IIMU shall determine whether each bid is (a) complete (b) is accompanied by the required information and documents and (c) is substantially responsive. A substantially responsive Bid is one which conforms to the requirements, terms, conditions and specifications without material deviation. A material deviation is one which affects in any substantial way the functionality, scope, quality, or performance of the deliverables, or which limits in any substantial way, IIMU's rights or the Bidder's obligations for, performance of the Project and the rectification of which deviation would affect unfairly the competitive position of other Bidders presenting substantially responsive Bids. In order to reach such a determination, IIMU will examine the information supplied by the Bidders, and shall evaluate the same as per the evaluation criteria specified. IIMU selection committee's evaluation in this regard shall be final and binding on the Bidder.
- An important criterion in the evaluation will be the Bidder's demonstrated ability to complete the Project in the given time frame. The workflows / blueprints proposed by the Bidder as a part of the Bid shall substantially assist IIMU while evaluating the Bid Document.
- IIMU shall have the right to call upon the Bidders for a Pre/Post-Bid technical presentation and / or a demonstration of the proposed Business Solution for IIMU wherein the core functionality and workflows shall be presented. IIMU may ask for the demonstration of the Bidders solution by running typical sample scenarios of IIMU's activities. The Bidders are also expected to present their key resources, which will be leading the implementation during the Pre-Bid presentation, whose profiles would be evaluated by the Evaluation committee.
- The Commercial evaluation will consider the information supplied by the Bidders in the Commercial

**Signature of Bidder
HOD**

Page 27 of 61

Signature of



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

Bid, and the same shall be evaluated in accordance with the specified evaluation criteria.

- IIMU may at its sole discretion, waive any minor informality or non-conformity or irregularity in a Bid Document, which does not constitute a material deviation, provided such a waiver does not prejudice or affect the relative ranking of any Bidder.

Selection Committee

- Selection Committee constituted by the IIMU shall evaluate the Bid Documents submitted by the Bidders.
- The Selection Committee may choose to conduct technical negotiation or discussion with any or all the Bidders. The decision of the Selection Committee in the evaluation of the Technical and Commercial bids shall be final and binding on all the parties. No correspondence will be entertained outside the process of negotiation / discussion with the Selection Committee.
- Any other information relating to the examination, clarification, evaluation and comparison of the Bid Document and recommendations (if any) shall not be disclosed by the Evaluation Committee to the Bidders or any other persons (other than Officers / advisors of IIMU), not officially concerned with such process.

Technical Bid Evaluation

All Bid Documents shall be evaluated and scored by the Selection Committee based on a point system, assessing each bidder's ability to satisfy the tender requirements.

Each Proposal will be evaluated according to the following criteria, but not limited to

- The qualities, responsiveness, responsibility, ease of use, reliability and comprehensiveness of the proposed business solutions.
- Adherence to IIMU's IT Architecture Plans, Information Systems Security Policy, Key Infrastructure Strategy, other strategic dimensions and services incorporated in the proposed solution.
- Bidder's understanding of IIMU's requirements as reflected in the approach presented by the bidder of the solution offered and technology related issues.
- Observations during site Inspections and Management Interviews, if requested by IIMU.
- Bidder's responses to all requirements including, but not limited to, data from the Bidder's Proposal, questions and answers, Bidder qualifications, expertise and relevant experience.
- Bidder's demonstrated ability to make available the key personnel at the time of contracting and post key personnel on the project thereafter. The Bidder must propose a key staffing plan and must present the key resources during the pre-bid meeting.
- Bidder's expertise in managing integrated systems and services and implementing and maintaining proven state-of-the-art technologies.
- Bidder's ability to provide the needed support (installation support, maintenance, training, etc.), references confirming past success in similar projects, use of appropriate technologies and products, ability to provide integrated software solution, etc.
- Bidder's Design, Development and Implementation Plan, its deployment of sound project management strategy and its allocation of sufficient resources to address all aspects of its proposed solution.

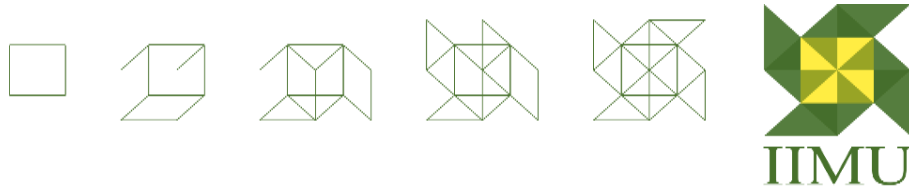
'IIMU CRM, Admissions and Executive Education Administration Platform' Business Solution

IIMU will evaluate the excellence of the Business Solution proposed, on the basis of its capability to meet IIMU's

Signature of Bidder
HOD

Page 28 of 61

Signature of



भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

Business, Management and Operational requirements. Additionally, the Bidder should specify if they could provide an intelligent integrated business tool, including tools for orchestrating web services into a business process.

Functionality

IIMU shall give weightage to the quality and fit of the solutions / blueprints /workflows proposed by the Bidder. The Bidder shall respond with the best practices / workflows implemented across the world and shall adopt these if best suited to the IIMU. The Bidder should propose workflows that comply with the legal and statutory requirements. Also, the proposed solution should have real time integration within the multiple modules of the currently running IIMU ERP Platform.

The best practices must be made available within the offered solution in key areas including current and future needs.

Package

IIMU will evaluate the package based on the following attributes, not limited to:

Tools

The proposed Business Solution platform should have a System administration tool and development tool to enable MIS, System administration and Customization. The integration components should be natively available as a part of the application/platform and should not be a third-party component. If some additional software tools, components or packages are needed to completely meet the functionality requirements, the Bidder should include them in the response.

Presentation

The presentation evaluation criteria will encompass User Interface (GUI/Character), Security facilities, Presentation Manager, Look and Feel, On-Line Help with customization capability, Drill-Down Support and Ad hoc analysis and reporting capabilities.

Technology

The evaluation from the Technology perspective will be based on Cloud Infrastructure Requirements to attain promised performance levels. Architecture should be such that it is interoperable with common platforms. Tools, Workflows, custom build/source Code, Technical and User documentation should be delivered with the standard shipment at no extra cost. Benchmark for online transaction processing and throughput for batch processing and Bandwidth utilization should be provided.

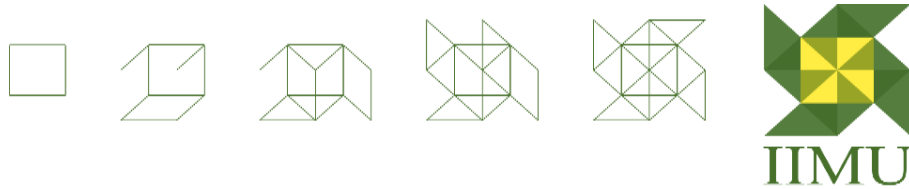
Risks

The Product should have the ability to map the existing unique processes of IIMU. The Bidder should have the ability to manage the Implementation timeframe adhering to the GO-Live dates of business activities mentioned

Signature of Bidder
HOD

Page 29 of 61

Signature of



भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

in the “Timelines for implementation”. Product upgrades should be regularly provided and it should be easily upgradeable by trained persons. Bidder should have at least one support facility in India.

Product stability with a clear-cut road map to continue and improve the platform and Availability of skills for improvement and customization. The Bidder shall also provide a detailed Risk Management Plan.

External Interface

The proposed solution must provide an external interface for,

Data export-import facility

Data integrity and validation during export-import

Enabling the integration of the solution with existing applications of IIMU, by making the EAI available within the solution. It should also be possible to expose the proposed platform as web services so that Business Process orchestration can be carried out across systems.

People

The IIMU Selection Committee will evaluate the information submitted by the Bidder with regard to Bidder’s proposed team, especially, the Project Manager, the Module Leaders and the team size for all the modules along with the team’s profile, in the response. The Bidder must put forth the best team that has the relevant design and implementation experience, expertise, domain knowledge, ability to be responsive to IIMU’s business needs and deadlines and the ability to meet the stringent deadlines. The Bidder cannot subcontract the work at any stage, without prior expression of approval from the IIMU.

Cost

The Bidder will be evaluated on the total cost of ownership which should cover the Pre-Implementation cost, Product License/Implementation Costs including Application, Platform and Infrastructure, Customization (Blue Prints / Workflows), One time Services components; Post-Implementation cost for Enhancements and Bug fixes; Change Management & Training; Regular Product and Platform upgrades, post-upgrade recertification of integrations and customizations, Onsite and Online help and System support services, cost to be incurred by IIMU on ongoing support for a period of five years.

Documents Constituting the Bid

The bid prepared by the Bidder shall comprise of the following components. The bids not conforming to the requirements shall be summarily rejected.

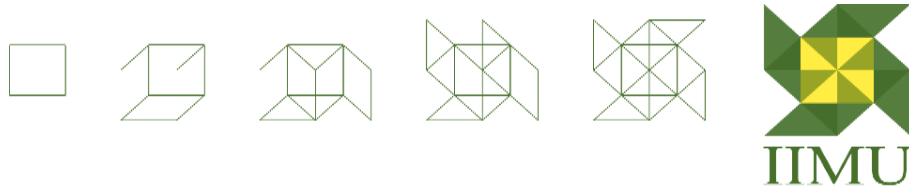
Technical Bid

The Technical Bid will comprise of a Cover Letter, Bid Proposal Sheet, Performance Statement for the stated requirements, Details of Design and Development plan, Hardware (Cloud Infrastructure & Platform) specifications, incremental infrastructure requirements, Project Staffing Plan, undertaking (as given below) and a detailed bill of materials with specifications. Please note that no price schedule should be indicated in the Technical Bid and shall only be quoted in the Commercial Bid. Failure to comply with the same may result in the rejection of the Bid.

Signature of Bidder
HOD

Page 30 of 61

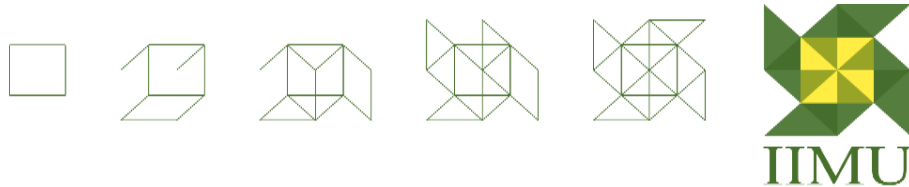
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भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

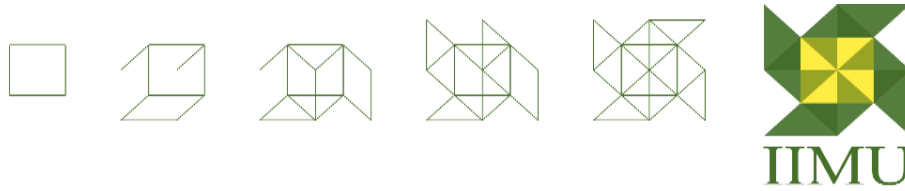
Criteria for Technical Evaluation and weightage:

Bidder credentials	Parameters	Weightage
Evaluation of at least one installation running the functional modules proposed for IIMU.	<p>Please provide detailed customer testimonial as a proof the solution running live at this customer location.</p> <p>Also enclose the contact name and number in the account.</p> <p>Preferred: Top International B-Schools with both full- time and executive education programs spanning all modules in scope. Clearly mention the products and modules supported whether they are the same as proposed or different.</p>	15%
Evaluation of client installations in India	<p>Please provide the list of customers / contact numbers and list of the modules in each installation.</p> <p>Preferred: IIMs/IITs/top schools in India with both full-time and executive education programs spanning all modules in scope.</p> <p>Clearly mention the products and modules supported whether they are the same as proposed or different.</p>	
Product Features - Fitment, Localization (if any) & Road Map	Parameters	40%
Core solution details	<p>Please explain / show in detail:</p> <p>Solution's ability to meet IIMU's Business, Management & Operational Requirements, including responses to requirements fit from Annexure XIII.</p> <p>Availability of ExEd functionalities without need for high customisation / another vendor/product integration</p>	
Localization (if any)	<p>If localization is required for any of the feature requirements, provide documentation that the solution provides localization:</p> <ul style="list-style-type: none"> • First Release date of the localized solution • How many releases till date and • Localization by the bidder or Partners 	



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

<p>Cloud provision details & data centres</p>	<p>Please specify whether the bidder themselves own the cloud infrastructure/data centre where the applications, platform and infrastructure are hosted. If not, provide the cloud provider details.</p> <p>Please provide the Quality of Service metrics for the components on cloud including, but not restricted to, scalability, security, availability.</p> <p>Provide information on where data is stored across application, platform and cloud infrastructure. Provide details of data centres in India.</p> <p>Provide details of mechanisms for Automation of Data Backup, Disaster Recovery, Cloning and other cloud operations and best practices available out-of-the- box to leverage.</p>	
<p>Product Upgrades - Ease in Upgrading Product</p>	<p>Please provide details of the upgrade path for all the components of the solution proposed. This should include but is not limited to the following:</p> <ul style="list-style-type: none"> • Dates of first release of the components of the solution • No. of versions released since the first release • Date of the release of the current version of the components of the solution • Frequency of future version releases • Will the upgrade to future releases require a major implementation effort? • Are all the custom components as part of solution design upgrade-friendly? If not specify details and effort required to build these components. • Are there upgrade tools available? If yes, please detail out the tools available and whether these are a part of the standard offer or whether IIMU needs to pay/budget for the same 	
<p>Solution Design, Technology, Openness - Integration & Interfacing Capability</p>	<p>Parameters</p>	
	<p>Please indicate whether the product/solution has built-in Report Development tools, EAI tools, Process Orchestration Tools, Custom Form / Application Development Tools.</p> <p>If yes, please elaborate whether the same can be used to interface the existing applications.</p> <p>Please indicate whether this is a part of the proposed solution or needs to be purchased separately.</p>	<p>20%</p>

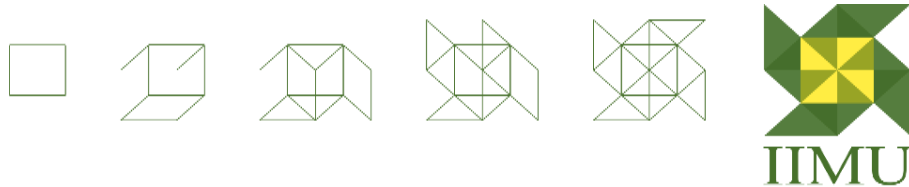


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भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

Solution Architecture	<p>Provide the overall solution and technical architecture and infrastructure.</p> <p>Please provide technical details on the availability, scalability of the proposed solution.</p> <p>Please provide how the architecture de-couples core operations to run distinctly from the customizations/extensions built.</p> <p>Please provide details of enhanced security features that are part of the proposed solution for application access. Features that secure different layers of infrastructure, database, data (at rest and in transit), platform and application, single-sign on with Active Directory, 2-Factor Authentication should be highlighted</p>	
Portal/Microsites Solution for IIMU	<p>Portal Offered should have the ability to offer seamless drill down into any application proposed. Also sign in integration with Active Directory option should be available.</p> <p>Further, ability to generate with low-coding on-demand template-based registration pages with payment integration should be supported.</p>	
Analytics	<p>Pre-built Analytics Content should be offered as part of the solution.</p>	
Extensibility vs Customization	<p>Please provide the features included in the product to support extensions that do not impact the upgradability of the core product.</p>	
Ease of Data Migration	<p>Provide details about the solution that makes migration of data easy, simple and robust. Provide details regarding how current data will be migrated.</p> <p>Also provide the features available and ease to extract data for a future migration out of the product suite.</p>	
Implementation & Post Implementation Maintenance & Ongoing Support	Parameters	
Direct Implementation capabilities of the Bidder	<p>Total number of consultants for the solutions proposed in the direct implementation team of the Bidder by Product and Module. Manpower deployment plan & resources dedicated to the project</p> <p>Plan for implementation which ensures that the timelines mentioned in functionality phases (section 15 of “General Terms</p>	25%

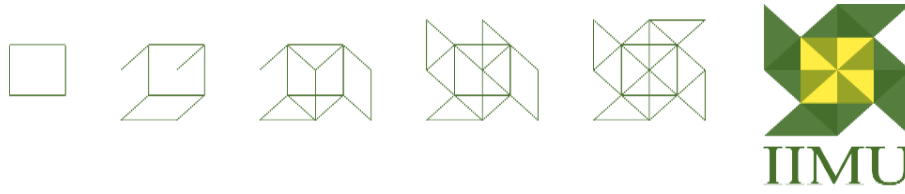


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भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

	<p>and conditions”) are met without fail and without compromise in functionalities</p> <p>Key personnel in the project team and their profile pertinent to the requirements of our implementation</p> <p>Please include the overall implementation experience and implementation experience in Higher Education sector</p>	
<p>Please indicate how committed you are for the successful implementation of the proposed solution at IIMU.</p>	<p>Please provide parameters for Service Level Agreements (SLAs)</p>	
<p>Process and Tools for better management and delivery of the project Adoption and Change Management</p>	<p>Any additional process and tools recommended as part of the project delivery and how it benefits the delivery and adoption of the solution.</p> <p>Is it brought in at zero cost to the institute?</p> <p>Provide details regarding the approach adopted during implementation to minimize customizations and drive adoption.</p>	
<p>Post-Production Support</p>	<p>Bidder should have Support Facility within India, Please provide the locations from which support is rendered.</p> <p>Specify support elements which are offered in Standard Support covered in AMC. Please provide Operating Model, (various channels / media / mode through which support can be provided), Ticketing System, SLAs, Penalty Clauses.</p> <p>Also, provide the model to enable development of enhancements over year 2 through year 5.</p> <p>Are any Proactive Services included in the AMC Cost?</p>	



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

Annexure – VII

**TENDER ACCEPTANCE LETTER
(To be given on Agency Letter Head)**

Date:

To, _____

Director, IIM Udaipur, Balicha, Udaipur, Rajasthan-313001.

Sub.: Acceptance of Terms & Conditions of Tender.

Tender Reference No.: IIMU/Tender/IIMU CRM-Adm-ExEd /2024

Name of Tender/Work: IIMU CRM, ADMISSIONS AND EXECUTIVE EDUCATION ADMINISTRATION PLATFORM AT IIM UDAIPUR

Dear Sir,

- 1.I/We have downloaded/obtained the tender document(s) for the above mentioned 'Tender/Work' from the web site(s) namely:_____ as per your advertisement, given in the above-mentioned website(s).
- 2.I/We hereby certify that I/We have read the entire terms and conditions of the tender documents from Page No. ___to___(including all documents like annexure(s), schedule(s), etc.,) which form part of the contract agreement and I/we shall abide by with the terms / conditions /clauses contained therein.
- 3.The corrigendum(s) issued from time to time by your department/organization too have all been taken into consideration, while submitting this acceptance letter.
- 4.I/We hereby unconditionally accept the tender conditions of above-mentioned tender document(s) / corrigendum(s) in its totality / entirety.
- 5.In case any provisions of this tender are found to be violated, then your department/organization shall without prejudice to any other right or remedy be at liberty to reject this tender/bid including the forfeiture of the full earnest money deposit absolutely.

Yours faithfully,

(Signature of the Bidder, with Official Seal)

**Signature of Bidder
HOD**

Page 35 of 61

Signature of



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

Annexure – VIII

PROFORMA OF PERFORMANCE BANK GUARANTEE

1 In consideration of the Director IIM Udaipur (hereinafter called "IIM UDAIPUR") having offered to accept the terms and conditions of the proposed agreement between IIM, UDAIPUR and (Hereinafter called "the said agency(s) for the work of **IIMU CRM, ADMISSIONS AND EXECUTIVE EDUCATION ADMINISTRATION PLATFORM AT IIM UDAIPUR** (hereinafter called "the said agreement") having agreed to the production of an irrevocable Bank Guarantee for Rupees.....only) as a security/ guarantee from the agency(s) for compliance of his obligations in accordance with the terms & conditions in the said agreement.

2 We (hereinafter referred to as the "Bank") do hereby undertake to pay amounts due and payable (indicate the name of the Bank) under this Guarantee without any demur, merely on a demand from the IIM, UDAIPUR stating that the amount claimed is required to meet the recoveries due or likely to be due from the said agency(s). Any such demand made on the Bank shall be conclusive as regards the amount due and payable by the Bank under this guarantee. However, our liability under this Guarantee shall be restricted to an amount not exceeding Rs..... (Rupees.....)

3 We, the said Bank, further undertake to pay to the IIM, UDAIPUR any money so demanded notwithstanding any dispute or disputes raised by the agency(s) in any suit or proceeding pending before any Court or Tribunal relating thereto, our liability under this present being absolute and unequivocal. The payment so made by us under bond shall be a valid discharge of our liability for payment thereunder, and the agency(s) shall have no claim against us for making such payment.

4 We..... further agree that the Guarantee herein contained shall (indicate the name of the Bank) remain in full force and effect during the period that would be taken for the performance of the said agreement, and it shall continue to be enforceable till all the dues of the IIM UDAIPUR under or by virtue of the said agreement have been fully paid, and its claims satisfied or discharged, or till the Chief Administrative Officer, IIM Udaipur on behalf of the IIM UDAIPUR, certifies that the terms & conditions of the said agency(s), and accordingly discharges this guarantee.

5 We..... further agree with the IIM UDAIPUR that the IIM UDAIPUR (indicate the name of the Bank) shall have the fullest liberty without our consent, and without effecting in any manner our obligations hereunder, to vary any of the terms & conditions of the said agreement or to extend time of performance by the said agency(s) from time to time or to postpone for any time or from time to time any of the powers exercisable by the IIM UDAIPUR against the said agency(s) and to forbear or enforce any of the terms and conditions relating to the said agreement, and we shall not be relieved from our liability by reason of any such variation or extension being granted to the said agency(s) or for any forbearance, act of omission on the part of the IIM UDAIPUR or any indulgence by the IIM UDAIPUR to the said agency(s) or by any such matter or thing whatsoever which under the law relating to sureties would, but for this provision, have the effect of so relieving us.

6 This Guarantee will not be discharged due to the change in the constitution of the Bank or the agency(s).

7 We..... lastly undertake not to revoke this Guarantee except with (indicate the name of the Bank) the previous consent of the IIM UDAIPUR in writing.

8 This guarantee shall be valid up to unless extended on demand by the IIM UDAIPUR.

Signature of Bidder
HOD

Signature of



Notwithstanding anything contained hereinabove:

a) our liability under this Guarantee shall not exceed

Rs. (Rupees.....Only);

b) This Bank Guarantee shall be valid up to..... and

c) We are liable to pay the guaranteed amount or any part thereof under this Bank Guarantee only and only if you serve upon us a written claim or demand on or before..... All your rights under the said guarantee be forfeited and we shall be relieved and discharged from all liabilities thereunder.

Dated the day of for

(Indicate the name of the Bank)

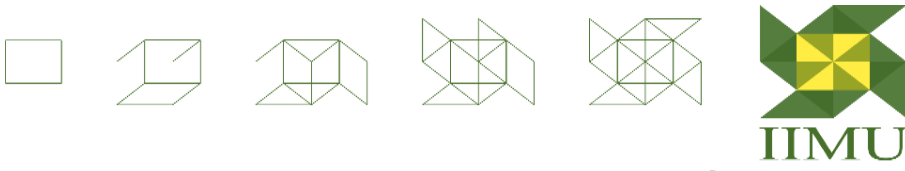


भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

Annexure – IX

PRE-BID CONFERENCE

1. A Pre-bid conference is stipulated in the Tender Information Summary (TIS), prospective bidders interested in participating in this tender may attend the Pre-bid conference to clarify the techno-commercial conditions of the Tenders at the venue, date and time specified therein.
2. Participation is not mandatory. However, if a bidder chooses not to (or fails to) participate in the Pre-bid conference or does not submit a written query, it shall be assumed that they have no issues regarding the techno-commercial conditions.
3. The date and time by which the written queries for the Pre-bid must reach the authority and the last date for registration for participation in the Pre-bid conference are also mentioned in the TIS.
4. Delegates participating in the Pre-bid conference must provide a photo identity and an authorization letter from their organization/ Hospital/ principals; otherwise, they shall not be allowed to participate. **The pre-bid conference may also be held online at the discretion of the Procuring Entity.**
5. After the Pre-bid conference, if required, a clarification letter and corrigendum to Tender Document shall be issued, containing amendments of various provisions of the Tender Document, which shall form part of the Tender Document.



भारतीय प्रबंध संस्थान उदयपुर
Indian Institute of Management Udaipur

Annexure - X

AGENCY TURNOVER CERTIFICATE
(Certificate by the CA)

Date:

To,

Director, IIM Udaipur, Balicha, Udaipur, Rajasthan-313001.

Sub.: Agency Turnover Certificate

Tender Reference No.: IIMU/Tender/ IIMU CRM-Adm-ExEd /2024

Name of Tender/Work: IIMU CRM, Admissions and Executive Education Administration Platform at IIM Udaipur

Dear Sir,

This is to certify that M/s _____ (name of the bidder agency) has a turnover of more than Rs. 02 **Crore** per annum from ERP related services only in each of the last three financial years ended on 31.03.2024 as per the details given below:

<u>Financial Year</u>	<u>Turnover Rupees (in words and figures) from ERP related services only</u>
2021-22	
2022-23	
2023-24	

Yours faithfully,

Name:

Signature with seal:

Membership No.....

UDIN

**Signature of Bidder
HOD**

Page 39 of 61

Signature of



**Single Customer/Entity of ERP Platform for Admissions and Executive Education
(Certificate by the CA)**

Date:

To,
Director, IIM Udaipur, Balicha, Udaipur, Rajasthan-313001.

**Sub.: Single Customer/Entity of ERP Platform for Admissions and Executive Education
Certificate**

Tender Reference No.: IIMU/Tender/ IIMU CRM-Adm-ExEd /2024

**Name of Tender/Work: IIMU CRM, Admissions and Executive Education Administration Platform
at IIM Udaipur**

Dear Sir,

This is to certify that M/s _____ (name of the bidder agency) have experience of successfully completing/operating at least one single contract from a single customer/entity having project / contract value not less than Rupees 75 lakh (implementation cost) in functional areas **related to ERP Platform for Admissions and/ or Executive Education** in each of the last three financial years ended on 31.03.2024. as per the details given below:

<u>Financial Year</u>	<u>Name of the Customer/ Entity</u>	<u>Project / contract Value</u>
2021-22		
2022-23		
2023-24		

Yours faithfully,

Name:

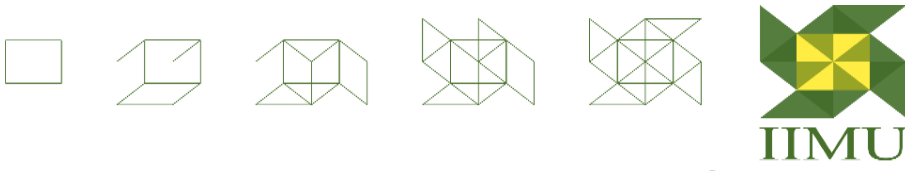
Signature with seal:

Membership No.....

UDIN

**Signature of Bidder
HOD**

Signature of



Technical Bid Eligibility Criteria - Undertaking
(To be given on Agency Letter Head)

To,
Director, IIM Udaipur, Balicha, Udaipur, Rajasthan-313001.

Sub.: Technical Bid Eligibility Criteria - Undertaking

Tender Reference No.: IIMU/Tender/ IIMU CRM-Adm-ExEd /2024

Name of Tender/Work: New ERP Platform for Admissions and Executive at IIM Udaipur

Dear Sir,

I/we have read the technical bid eligibility criteria and the details of M/s _____ is appended below:

Sl.	Criteria	No. of Years/ Customers	Page No. of attached bid document
1.	No. of years established by Bidder Company's in years as on 1 st April 2024		
2.	No. of Indian customers served by the bidder in implementing ERP solutions in higher education sector as on 1 st April 2024.		
3.	No. of customers where the bidder has demonstrated experience in cloud across application, platform and infrastructure.		
4.	Bidder should have at least 4 years of presence in providing ERP related solutions within the higher education sector.		
5.	Bidder should have an average annual turnover of more than Rs. 2 Crore per annum from ERP related services for the last three financial years ended on 31.03.2024.		
6.	Bidder must have a minimum of 50 regular employees on their payroll. A self-undertaking from the bidder required.		
7.	Bidder shall have a support center in India and provide the details.		

- I/we own full responsibility of providing the application, the infrastructure, the customization platform and a query-able data store for historical data, all on the self-owned cloud, and will own fully responsibility of the implementation.
- I/we shall not sub-contract the implementation of their product to other bidders or use sub-contractor resources for the same.
- I/we confirm that our ERP product will have extensibility for client specific process requirements.

Yours faithfully,

(Signature of the Bidder, with Official Seal)



Annexure – XIII

Functional RFP - Admissions for Degree granting programmes other than 2-year MBA

Sr. No.	Particulars	Phase	Vendor Response (Y/N/C etc.)	Vendor Comments
1	Admissions for Degree granting programmes other than 2-year MBA			
1.1	Prospect outreach management	Adm-P1		
1.1.1	Ability for Marketing team to create landing pages for event registrations (open house, webinars etc.), manage registrations, communication with prospects via email, SMS, WhatsApp, collect attendance to events.	Adm-P1		
1.1.2	Configuration of Automated reminders	Adm-P1		
1.1.3	Ability to unsubscribe	Adm-P1		
1.1.4	Ability for marketing team to view dashboard/analytics regarding registrations for an event / across events / across years.	Adm-P1		
1.2	Ability to pool, analyse and engage with enquiries routed from:	Adm-P1		
1.2.1	Social Media platforms	Adm-P1		
1.2.2	IIMU website via embedded enquiry form	Adm-P1		
1.2.3	Chatbot	Adm-P1		
1.2.4	Event registrations	Adm-P1		
1.2.5	Webinar Registrations	Adm-P1		
1.2.6	Marketing campaign responses	Adm-P1		
1.2.7	Phone calls	Adm-P1		
1.2.8	Manual Inputs by counsellors, marketing team	Adm-P1		
1.3	CRM Platform	Adm-P1		
1.3.1	Lead Management	Adm-P1		
1.3.2	Lead nurturing	Adm-P1		
1.3.3	Campaign management	Adm-P1		
1.3.4	Marketing Automation	Adm-P1		
1.3.5	Counsellors and Users Management	Adm-P1		

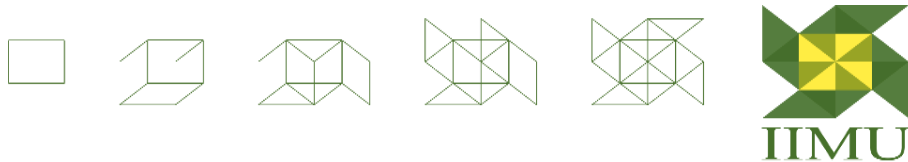


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1.3.6	Publisher Panel	Adm-P1		
1.3.7	Query Management System	Adm-P1		
1.3.8	WhatsApp Integration	Adm-P1		
1.3.9	My Operator Integration (Telephony Integration)	Adm-P1		
1.3.10	Chat integration	Adm-P1		
1.3.11	Link to Online application process, account creation, verification with email / Mobile OTP	Adm-P1		
1.3.12	Ability to maintain and track multiple applications for single lead with restrictions for unique lead+program+academic year combination	Adm-P1		
1.3.13	Analytics across years	Adm-P1		
1.3.14	BI dashboards	Adm-P1		
1.4	Online Application process management capabilities for degree granting programs	Adm-P1		
1.4.1	Separate application forms for each program; Date of birth should be unique identifier along with mobile no or email ID for account creation on the portal.	Adm-P1		
1.4.2	Separate landing page for international applicants of the same program; capture information and configure rules specific to international applicants along with other information common with domestic applicants.	Adm-P1		
1.4.3	Ability to specify a different application fee for international applicants for the same program, in a different currency - if required	Adm-P1		
1.4.4	Separate application process flows and stages of application for each program (with Forex charges auto-added)	Adm-P1		
1.4.5	Single / multiple sections in application form , single record and multi-record form controls,	Adm-P1		
1.4.6	Ability to build in cross-field and cross-section validation rules for ensuring adherence to qualifying criteria. For ex. Work-ex not to overlap graduation period, minimum graduation marks, valid years for test scores etc.	Adm-P1		
1.4.7	Ability to collect references online from the referees specified by applicant in the application form. The referral collection should be initiated by applicant from within the application form.	Adm-P1		



भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

1.4.8	Ability to build application form for any new program, with configurable document uploads (mandatory / conditional mandatory / optional, dependent on application form fields))	Adm-P1		
1.4.9	Ability to define completion stages for each application so that percentage completion until submission can be determined	Adm-P1		
1.4.10	Ability to specify workflows / process flows with events and action triggers (auto and manual trigger action)	Adm-P1		
1.4.11	Ability to collect additional information, payments and additional documents from applicants after initial form submission. The additional information can be grouped by purpose and collected at different phases of the post-application submission process.	Adm-P1		
1.4.12	Ability to group applicants and perform actions in batch like email triggers	Adm-P1		
1.4.13	Ability to configure email and letter templates with images and attachments (Offer letters, acceptance letters etc.), along with downloadable PDF formats	Adm-P1		
1.4.14	Ability to specify one or more fee components for specified stage of application, with amounts based on applicant's choices in the application	Adm-P1		
1.4.15	Ability to configure application with or without application fee requirement.	Adm-P1		
1.4.16	Ability to integrate and collect online payments, identifying the purpose of payment	Adm-P1		
1.4.17	Ability to specify allowed payment methods for different kinds of payments and issue receipts	Adm-P1		
1.4.18	Ability to collect part payments for a single transaction and track closure of payments	Adm-P1		
1.4.19	Ability to generate challans for offline payments by third parties (banks) to virtual accounts and update of the same back to the originating transaction	Adm-P1		
1.4.20	Ability to specify foreign currency fee components - if applicable	Adm-P1		
1.4.21	Ability to communicate / interact with stakeholders (aspirants, interviewers etc.) via email, WhatsApp/SMS from within the platform, Application stage wise	Adm-P1		



भारतीय प्रबंध संस्थान उदयपुर

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1.4.22	Ability for applicant to raise queries / interact with IIMU admissions team from within the application account, along with support for document attachments in the interactions	Adm-P1		
1.4.23	Ability to verify documents uploaded and update status as verified / pending, with comments. Maker / checker configuration for verification process, communication to candidate for submission from within the process page, and collection of the document from candidate.	Adm-P1		
1.4.24	Reports of pending documents with due date alerts to specified users / candidate	Adm-P1		
1.4.25	Ability to fetch / verify documents with Digi Locker			
1.4.26	Ability to assign interviewers and interview schedules for shortlisted applicants via spreadsheet uploads, auto-generate online interview session links (e.g. zoom, teams etc.) for students, interviewer and moderator and trigger emails to applicants and interviewers. Interviewee Absent stage if he or she absent Interviewee accept or decline status	Adm-P2		
1.4.27	Ability for interviewers to view one or more selected documents and the application summary of the candidate that he/she is interviewing and then provide ratings. Interviewer dashboard with ability to update marks, to see student profile, SOP or video, references, and Interview rating sheet.	Adm-P2		
1.4.28	Ability to configure different interview rating criteria for different programs	Adm-P2		
1.4.29	Ability to capture video resume recordings, references, SoP etc. of applicants along with the application form or post-submission of the application (only for shortlisted candidates)	Adm-P2		
1.4.30	Ability to link single page forms (without any authentication requirement / CRM software account requirement) and collect inputs from External stakeholders like interview panellists, admissions committee members, application reviewers, referees who provide referrals for applicants etc. Ability to re-open such forms for external stakeholders if required	Adm-P2		
1.4.31	Ability for Admissions office to collectively view such information collected from external stakeholders	Adm-P2		



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1.4.32	Ability to specify shortlisting criteria and weightages	Adm-P2		
1.4.33	Ability to review applicants after applying shortlisting criteria and weightages	Adm-P2		
1.4.34	Ability to manage offer lists and waitlists, waitlist ranks; Different waitlist no for the same scored applicants. Applicable for all the programs	Adm-P2		
1.4.35	Ability to manage withdrawals -	Adm-P2		
1..4.35.1	Program specific withdrawal form	Adm-P2		
1..4.35.2	Application cycle specific withdrawal deadlines,	Adm-P2		
1..4.35.3	allow withdrawal submission even after withdrawal deadline after with notifications about conditions for withdrawal	Adm-P2		
1..4.35.4	enable or disable withdrawals,	Adm-P2		
1..4.35.5	enable collection of bank details to process withdrawals if refund is due	Adm-P2		
1..4.35.6	Living expenses calculation on prorata basis for calculating the exact refund amount in case of not-refund-due	Adm-P2		
1.4.36	Intimate applicants about processing the refund amount if applicable.	Adm-P2		
1.4.37	Ability to configure help text / instructions specific for each program (inline help texts, tooltips, on-page help texts)	Adm-P1		
1.4.38	Registration process to be added in 1YMBA, PhD, EMBA , like taking travel details, Resignation letter, any pending document if any, applicant can upload before arriving to the campus.	Adm-P2		
1.5	IIMU Operations user functionalities	Adm-P1		
1.5.1	Ability to define program versions - one for each academic year + program	Adm-P1		
1.5.2	Ability to have multiple application cycles for each program version + academic year	Adm-P1		
1.5.3	Ability to configure application stages for each program / program version	Adm-P1		
1.5.4	Ability to specify application open and close dates, fee payment deadlines for different kinds of fees, cut-off dates for work experience criteria, deadlines for referral submissions for each cycle	Adm-P1		
1.5.5	Ability to override these deadlines for a single applicant	Adm-P1		

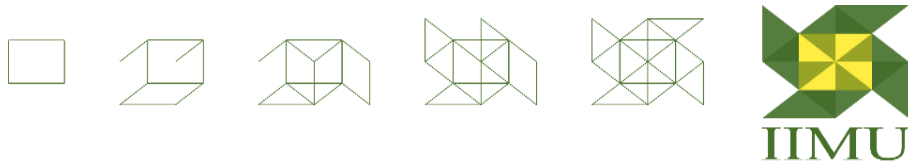


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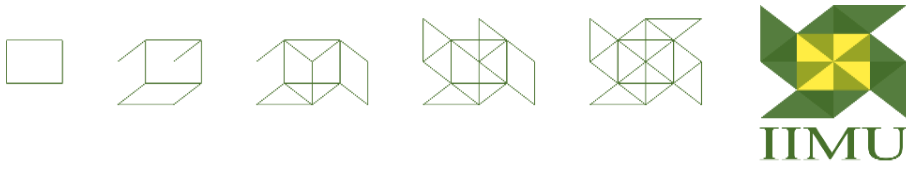
1.5.6	Ability to configure and enable / disable auto-email reminder schedules for application completion or payment completion for each program	Adm-P1		
1.5.7	Ability to intimate applicants about their application status both via email and in their application account	Adm-P1		
1.5.8	Ability for Admissions office to view, manually intervene and update the application data with proper audit trail	Adm-P1		
1.5.9	Ability to re-open submitted applications for entry by applicants, manually override the application stage of any applicant	Adm-P1		
1.5.10	Ability to create applications for a program in batch via spreadsheet upload	Adm-P1		
1.5.11	Ability to perform document verification with status update	Adm-P1		
1.5.12	Ability to generate document verification status reports	Adm-P1		
1.5.13	Ability to download application form PDFs and supporting documents in bulk for selected batch of applicants of any batch of any year.	Adm-P1		
1.5.14	Ability to view each document without downloading. Ability to verify all document of each candidate in single click. Ability to download all documents in single PDF/word/XL. Ability to download applicants profile along with all uploaded document in single PDF/Word. Ability to view sent communication to the applicants related to pending documents, fee or other related item	Adm-P1		
1.5.15	Audit trail for all applicant actions and Admission office actions and updates to data	Adm-P1		
1.5.16	Pre-built reports as per agreed requirements (applicant data, payments, percentage completion, comparison across years, reports of inputs collected from interviewers, referees, application reviewers etc.)	Adm-P1		
1.5.17	Ability to generate on-demand reports with chosen columns from the application form	Adm-P1		
1.5.18	Analytics across years, BI dashboards	Adm-P1		
1.5.19	Ability to see date wise admission count, like on first day of campus, or after 15 days or so on till convocation	Adm-P1		
1.5.20	Campus on-boarding data integration			



भारतीय प्रबंध संस्थान उदयपुर

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1.5.21	Document management – ability to store all uploaded documents across years and ability to retrieve them at any time	Adm-P1		
1.6	Aspirant / Applicant functionalities	Adm-P1		
1.6.1	Single online application account for an applicant based on email / mobile number	Adm-P1		
1.6.2	Ability to request for change in mobile number / email id for the account as long as the unique criteria is satisfied	Adm-P1		
1.6.3	Ability for applicant to apply to multiple programs for an academic year	Adm-P1		
1.6.4	Visibility of all applications (current and previous years) for an applicant on the dashboard along with status	Adm-P1		
1.6.5	Ability to view and download payment acknowledgements for all fees paid from the OLAP account	Adm-P1		
1.6.6	Ability to download application summary PDF	Adm-P1		
1.6.7	Ability to initiate interaction with IIMU admissions Office from within the account	Adm-P1		
1.6.8	Alerts and notifications section in the OLAP account	Adm-P1		
1.6.9	Interim save facility for application form to be filled in stages before submission	Adm-P1		
1.6.10	Percentage of application completion visibility	Adm-P1		
1.6.11	Help text / Instruction text accessibility	Adm-P1		
1.7	Integration Requirements with other systems			
1.7.1	Ability to integrate with D365 FO ERP to post all kinds of payments collected either in real time or in scheduled batches, and to process refunds approved by Admissions office.	Adm-P1		
1.7.2	Ability to integrate payment posting to D365 in multiple currencies	Adm-P1		
1.7.3	Ability to receive information from the D365 FO system regarding refund disbursements and intimate the applicants in their application account and via email / SMS / WhatsApp	Adm-P1		
1.7.4	Ability to integrate with Student information system(SIS) to push applicants data, documents, payments etc. for enrolment creation.	Adm-P3		



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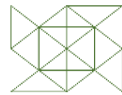
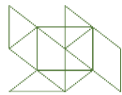
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1.7.5	Ability to push both new data, and incremental modifications and deletions to data and documents into the IIMU ERP SIS	Adm-P3		
1.7.6	Controls to ensure data consistency and integrity with the IIMU ERP-SIS system, and to keep the status of applicants in sync with the IIMU ERP - SIS	Adm-P3		
1.7.7	Ability to push identified data elements into the proposed IIMU Data warehouse layer as per pre-determined schedule.	Adm-P4		
1.8	Data migration -data of currently running Admissions platform to the new platform			
1.8.1	Data pertaining to Contacts, leads, applications, biographic information, previous education, Test scores, work experience and documents of all applicants of all programs starting from 2019 has to be migrated to the new platform and be available for reporting / BI analytics	Adm-P2		
1.9	Audit trail and security			
1.9.1	Ability for maintaining audit trail for all data changes and actions along with "changed from" and "changed to" values, date and timestamp and userid	Adm-P1		
1.9.2	Ability to view / download the system maintained audit trail	Adm-P1		
1.9.3	Ability to ensure good response time and performance of system with audit trail enabled	Adm-P1		
1.9.4	Ability to define user roles, privileges, and user groups to administer data and functional security	Adm-P1		



Functional RFP Executive Education Administration

Sr. No.	Particulars	Phase	Vendor Response (Y/N/C etc.)	Vendor Comments
2	Executive Education(ExEd) : CRM, Program Registration, Administration, Billing and payments, Reports and Analytics			
2.1	Prospect outreach management	ExEd-P2		
2.1.1	Ability for Marketing team to create landing pages for event registrations (open house, webinars etc.), manage registrations, communication with prospects via email, SMS, WhatsApp, collect attendance to events.	ExEd-P2		
2.1.2	Configuration of Automated reminders	ExEd-P2		
2.1.3	Ability to unsubscribe	ExEd-P2		
2.1.4	Ability for marketing team to view dashboard/analytics regarding registrations for an event / across events / across years.	ExEd-P2		
2.2	Ability to pool, analyse and engage with enquiries routed from :	ExEd-P2		
2.2.1	Social Media platforms	ExEd-P2		
2.2.2	IIMU website via embedded enquiry form	ExEd-P2		
2.2.3	Chatbot	ExEd-P2		
2.2.4	Event registrations	ExEd-P2		
2.2.5	Webinar Registrations	ExEd-P2		
2.2.6	Marketing campaign responses	ExEd-P2		
2.2.7	Phone calls	ExEd-P2		
2.2.8	Manual Inputs by counsellors, marketing team	ExEd-P2		
2.3	CRM Platform	ExEd-P2		
2.3.1	Lead Management	ExEd-P2		
2.3.2	Lead nurturing	ExEd-P2		
2.3.3	Campaign management	ExEd-P2		
2.3.4	Marketing Automation	ExEd-P2		
2.3.5	Counsellors and Users Management	ExEd-P2		
2.3.6	Publisher Panel	ExEd-P2		
2.3.7	Query Management System	ExEd-P2		

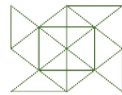
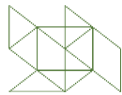


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2.3.8	WhatsApp Integration	ExEd-P2		
2.3.9	My Operator Integration	ExEd-P2		
2.3.10	Chat integration	ExEd-P2		
2.3.11	Link to Online application process, account creation, verification with email / Mobile OTP	ExEd-P2		
2.3.12	Ability to maintain and track multiple applications for single lead with restrictions for unique lead+program+academic year combination	ExEd-P2		
2.3.13	Analytics across years	ExEd-P2		
2.3.14	BI dashboards	ExEd-P2		
2.4	Set up ExEd Programme Calendar and other attributes of the program as applicable	ExEd-P1		
2.4.1	Set up ExEd programme calendar for Short duration programmes (OEP - Short Duration), (OEP - Long Duration programme, CEP - customized programmes and Blended Programmes, with date control for publishing online	ExEd-P1		
2.4.2	Set up programme objectives & description, programme directors and coordinators, programme assistants, programme start and end dates (which could have multiple modules with begin and end dates and breaks in between), whether offered on campus, off-campus or both, the date ranges for which the programmes / each modules were co-ordinated, percentage of contribution of Programme Directors, hours/days of effort of program assistants and co-ordinators	ExEd-P1		
2.5	ExEd Office - Programme Definition			
2.5.1	Setup Open Programmes for Registration (individual or group), IIMU owned programs or GoI Supported programs, and Setup Custom Programs	ExEd-P1		
2.5.2	Set up programme fees for residential and non-residential participants, INR and USD (if applicable)	ExEd-P2		
2.5.3	Set up fees payable on registration, including, early bird discounts, their validity and applicable taxes	ExEd-P2		
2.5.4	Setup screening requirements if applicable and deadline for fee payment after screening	ExEd-P2		
2.5.5	Set up Group discount percentages and group size	ExEd-P2		
2.5.6	Setup fee schedule for OEP-Long durations	ExEd-P2		
2.5.7	Publish online, showing only relevant fees and other information	ExEd-P2		

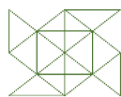
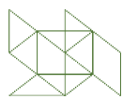
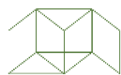


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2.6	Online Application / Registration	ExEd-P2		
	Separate applications for	ExEd-P2		
2.6.1	(OEP - Short Duration), - individual Registration			
2.6.2	(OEP - Short Duration), - Group Registration			
2.6.3	(OEP - Long Duration) - individual registration			
2.6.4	(OEP - Long Duration) - Group registration			
2.6.5	(CEP - Custom Programs)			
2.6.6	(CEP - Custom Programs) - these programs are not to be published on dashboard, ExEd office should be able to send links to the participating company / group owners for registration of participants, billing and payments	ExEd-P2		
2.6.7	Single online application account for a participant based on email / mobile number	ExEd-P2		
2.6.8	Ability to request for change in mobile number / email id for the account as long as the unique criteria is satisfied	ExEd-P2		
2.6.9	Ability for participant to apply to multiple ExEd programs	ExEd-P2		
2.6.10	Display a dashboard for prospects showing separately programmes offered in the functional areas they have expressed their interest and programme offered in other functional areas	ExEd-P2		
2.6.11	Enable prospects to view programme objectives & description, programme coordinators, their profile & photographs, programme start and end dates, whether offered on campus, off-campus or both	ExEd-P2		
2.6.12	Enable prospects to view programme fees details	ExEd-P2		
2.6.13	Enable prospects to apply (for programmes where participant screening is required for admission or directly register for programmes (where screening of participants is not required) on payment of the prescribed fees	ExEd-P2		
2.6.14	Online application consists of several sections. Ability to add/modify fields depending on the Short duration Programme and different types of Long duration programme and custom programme	ExEd-P2		
2.6.15	Ability for ExEd office to specify document uploads - mandatory, conditional mandatory, optional	ExEd-P2		
2.6.16	Photographs / PDF documents can be uploaded in the appropriate sections, with a facility for the applicant to delete and re-upload any document	ExEd-P2		
2.6.17	Ability to verify documents uploaded and update status as verified / pending, with comments.	ExEd-P2		
2.6.18	Reports of pending documents with due date alerts to specified users / candidate	ExEd-P2		

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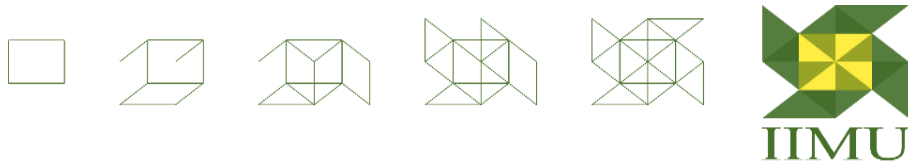
2.6.19	Each section will be marked as complete when all mandatory fields in that section have been entered, Percentage of application completion visibility	ExEd-P2		
2.6.20	Applicants can specify the sponsor details if applicable	ExEd-P2		
2.6.21	A separate upload section provides upload of PDF documents that do not pertain to any specific section, with a facility for the applicant to delete and re-upload a specific document	ExEd-P2		
2.6.22	An application preview facility allows the applicant to periodically view his / her application in PDF format	ExEd-P2		
2.6.23	Ability to integrate and collect online payments, identifying the purpose of payment, program etc. both in INR and foreign currency	ExEd-P2		
2.6.24	Ability to specify allowed payment methods for different kinds of payments and issue receipts	ExEd-P2		
2.6.25	Ability to issue receipt in the name of the sponsor, wherever applicable	ExEd-P2		
2.6.26	Ability to collect part payments for a single transaction and track closure of payments	ExEd-P2		
2.6.27	Ability to generate challans for offline payments by third parties (banks) to virtual accounts and update of the same back to the originating transaction	ExEd-P2		
2.6.28	Ability to make online payments In foreign currency	ExEd-P2		
2.6.29	Group owner should be able to trigger links for the group members to fill in the application form, the members should be able to submit without payment.	ExEd-P2		
2.6.30	Replacing group members should invalidate the earlier link generated for application form	ExEd-P2		
2.6.31	Provide for Fees payment for a group by the group owner / creator. Facility to add, replace group members after payment is made.	ExEd-P2		
2.6.32	Provision for multiple payments towards one invoice and multiple invoices for one group registration.	ExEd-P2		
2.6.33	For OEP - Long Duration, provide for participants to pay in advance for an instalment	ExEd-P2		
2.6.34	The submit facility enables the applicant to formally submits his / her application for the programme. Upon submit the applicant can only view the various sections of the application in 'Read only' mode and view the PDF.	ExEd-P2		
2.6.35	Generate proforma invoice, Invoice and receipts that can be printed by the applicants; if opted for, the invoices can be generated in the name of the sponsoring organization.	ExEd-P2		



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2.6.36	GST, TDS applicability are to be taken care of in all scenarios	ExEd-P2		
2.6.37	Ability to configure help text / instructions specific for each type of program (inline help texts, tooltips, on-page help texts)	ExEd-P2		
2.7	ExEd office - programme Administration	ExEd-P2		
2.7.1	Application viewing for all kinds of ExEd programs	ExEd-P2		
2.7.2	For OEP - Short Duration programmes where screening is required, enable confirmation of application and intimate the participant(s) for payment of fees	ExEd-P2		
2.7.3	Ability to verify documents uploaded and update status as verified / pending, with comments. Reports of pending documents with due date alerts to specified users / candidate	ExEd-P2		
2.7.4	Shortlisting and acceptance management (if applicable for OEP - Long Duration programmes)	ExEd-P2		
2.7.5	View the PDFs of Applicants as well as view their details in the Admin screen	ExEd-P2		
2.7.6	Enable programme directors to view the applicant profiles online	ExEd-P2		
2.7.7	Generate a spreadsheet containing relevant information required for shortlisting for selection for the specific programme	ExEd-P2		
2.7.8	Set up status as a tag as offered/accepted etc. for further monitoring	ExEd-P2		
2.7.9	Send out 'offer' emails and facilitate 'acceptance amount' payment from the candidates who have been offered; provision for attachment, images to be included in the letter templates, with downloadable PDF option	ExEd-P2		
2.7.10	Manage 'wait list' by sending offers to candidates in their waitlisted order, should anyone who has been offered does not accept it within the stipulated timeframe	ExEd-P2		
2.7.11	If a participant who has paid subsequently wishes to withdraw, enable a process flow to accept refund request, send it for approval and then release to D365 for processing the refund	ExEd-P2		
2.7.12	Provision to fetch back the processed refund details from Finance system and intimate the same to participants	ExEd-P2		
2.7.13	Set up class schedules for each session in the programme, assign instructor(s)	ExEd-P1		
2.7.14	Publish and view class schedule in prescribed format	ExEd-P1		
2.7.15	Upon conclusion of each programme, facility to review and finalize the teaching and co-ordination workload of faculty members ; this information will be part of faculty work reports	ExEd-P1		



भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

2.7.16	Assign unique roll number for each registered participant in IIMU prescribed format, the same roll no to be used for LMS integration	ExEd-P1		
2.7.17	Mark attendance for programmes that mandate attendance for sessions	ExEd-P1		
2.7.18	Enter / upload via spreadsheet Participant Grades for Modules & Topics as applicable; when LMS is implemented, fetch the grades/marks from the LMS into this platform	ExEd-P1		
2.7.19	Feedback Collection on the programme - Setup questionnaire with options and weightage, text based questions, feedback open and close dates. Allow configurability in feedback setup for different types of programs	ExEd-P1		
2.7.20	Marks / Grade sheet printing for Long duration programmes in IIMU prescribed format	ExEd-P1		
2.7.21	Certificate printing - Print certificates of successful completion for the participants in IIMU prescribed format for all types of programs. The issued certificate should also be maintained in the system for future reference	ExEd-P1		
2.7.22	At the end of the year / month / quarter, generate consolidated reports of all faculty w.r.t teaching and co-ordination across programmes, this will be used for disbursing payments to guest faculty etc. and for import into faculty work reports	ExEd-P1		
2.7.23	Other Participant profiling reports	ExEd-P1		
2.7.24	Programme-wise, academic year-wise feedback reports, analysis across years and instances of the same program	ExEd-P1		
2.7.25	BI dashboards as per IIMU requirement	ExEd-P1		
2.7.26	For participants who have completed the programs, collection of Alumni fee, update to Alumni status, capture / upload of Alumni id card number, date of issue	ExEd-P1		
2.8	ExEd Office - Finance functionalities			
2.8.1	Ability to define and view the individual ExEd programs (all types) and the corresponding participants in D365 Finance system	ExEd-P1		
2.8.2	Invoices and payment transactions should be facilitated both in INR and foreign currency ; Invoice format should be GST compliant and as per IIMU approved format	ExEd-P1		
2.8.3	Proforma Invoice generation for participant / group owner / organisation; Invoice format should be GST compliant and as per IIMU approved format	ExEd-P1		



भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

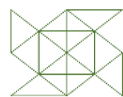
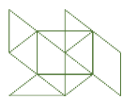
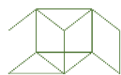
2.8.4	For OEP - Short Duration programmes , create GST invoices only upon payment by participant, either in the name of the participant or in the name of the sponsor company	ExEd-P1		
2.8.5	For OEP - Long Duration programmes , based on the instalment dates, system generates invoices for all valid participants of the programme. ExEd office and accounts office are alerted by system generated emails about invoice generation. These are then validated / confirmed by Finance and posted to the D365 Finance system	ExEd-P1		
2.8.6	All Financial documents generated in D365 Finance and payments should be posted to D365 Finance only after confirmation by Finance department.	ExEd-P1		
2.8.7	The D365 Finance provided features for multiple tax rates, discounts etc. over a period of time, should be reflected in the ExEd invoices and payments too	ExEd-P1		
2.8.8	Online payments should be directly visible in the D365 Finance system along with relevant identifying information without user having to manually upload any payment transactions	ExEd-P1		
2.8.9	Advances are accounted separately and the invoice generation process also considers the advance amount while creating the receivable and GST components	ExEd-P1		
2.8.10	Printing of Receipt voucher in IIMU Prescribed format for Advances received	ExEd-P1		
2.8.11	For guest faculty, based on the teaching effort hours report generated from the system, Ex-Ed office should be able to initiate/recommend payment, submit for approval. The approved advice should be visible for Finance to disburse the payment, and the corresponding disbursement should be updated against the faculty in the programme records. This is to give visibility of program-wise payment status (pending, approved, disbursed) of guest faculty	ExEd-P1		
2.8.12	ExEd office and Finance department get a list of reports which help them to track and reconcile the invoices and payments along with tax(GST, TDS etc.) and discount components for each programme so that the management is aware of the revenue and receivable for each programme at any point in time	ExEd-P1		
2.8.13	The Income and Expenditure statement report(summary and details) for each programme should be available as a report for any defined period / year.	ExEd-P1		
2.8.14	By each participant (customer) of ExEd program, view of all transactions including refunds(if any) should be available in D365 Finance - Customer Account statement	ExEd-P1		



भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

2.8.15	Profitability analytics reports of ExEd programmes across years should be available	ExEd-P1		
2.8.16	BI dashboards as per IIMU requirement	ExEd-P1		
2.9	Participants' services through portal			
2.9.1	Dashboard of past programmes attended and the current calendar	ExEd-P2		
2.9.2	Application process depending on the program and type of participant, document uploads, sponsor details	ExEd-P2		
2.9.3	Ability to communicate with ExEd office from within the application	ExEd-P2		
2.9.4	Proforma invoices	ExEd-P2		
2.9.5	Online payments, choice of payment methods, part payments, foreign currency payments if allowed in setup.	ExEd-P2		
2.9.6	Optionally Specify TDS and other deduction components while making payments	ExEd-P2		
2.9.7	Invoices and Payment transactions with downloadable invoices and payment acknowledgements	ExEd-P2		
2.9.8	Instructions and help text accessibility	ExEd-P2		
2.9.9	Post application and registration	ExEd-P2		
2.9.9.1	View programme schedule	ExEd-P2		
2.9.9.2	view attendance where applicable	ExEd-P2		
2.9.9.3	View Grades where applicable	ExEd-P2		
2.9.9.4	Provide programme feedback	ExEd-P2		
2.10	Customized / Organization based programmes for domestic and international customers			
2.10.1	Define organizational customers along with their attributes	ExEd-P1		
2.10.2	Allow for definition of company-parent company hierarchy	ExEd-P1		
2.10.3	Define programmes for customers along with a batch no for repeat instances of a programme	ExEd-P1		
2.10.4	Allow for definition of modules and phases within each programme based on programme packaging and delivery	ExEd-P1		
2.10.5	Allow for defining module level faculty co-ordinators (one/multiple)	ExEd-P1		
2.10.6	Allow session-wise scheduling for each phase of programme delivery	ExEd-P1		
2.10.7	Define payment milestones in INR/ foreign currency	ExEd-P1		

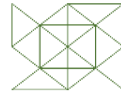


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भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

2.10.8	ExEd office generates invoices based on milestones; provision for generating non-milestone invoice also provided. Currency selection, exchange rate selection allowed during invoice creation. Proforma invoice creation is facilitated. Invoice can be cancelled until it is posted. Allow for confirmation of invoice, printing of invoice and emailing of invoice to customer after posting the same.	ExEd-P1		
2.10.9	Each customer is sent a unique link which can be used for online payment. Customer views the invoices and payments in his account. Customer should be able to also specify details of deductions while making the payment	ExEd-P1		
2.10.10	ExEd office reviews the payments received. Online payments are auto confirmed. ExEd office apportions the received payment against one or more pending invoices posts them to D365 Finance system.	ExEd-P1		
2.10.11	ExEd office can choose to move any extra payment to advance account for the customer. This advance is visible to ExEd office to offset against future invoices for the customer.	ExEd-P1		
2.10.12	Receipts for verified payments are generated by the D365 Finance system. Accounting for foreign currency payments is as per D365 Finance system	ExEd-P1		
2.10.13	Allow for emailing the receipts / view of the receipts to the customer organisation	ExEd-P1		
2.11	Reporting requirements			
2.11.1	Detailed programme-wise, period-wise and summary reports of design, co-ordination, teaching effort for concerned faculty(regular and guest), spill over sessions and co-ordination days, invoices and payments tracking, revenue figures are made available.	ExEd-P1		
2.11.2	Report of teaching, design and co-ordination hours should be compatible to upload and initiate payments from the HRMS system of IIMU	ExEd-P1		
2.11.3	The Income and Expenditure statement report for each programme should be available as a report for any defined period / year.	ExEd-P1		
2.11.4	Profitability analytics reports of ExEd programmes across years should be available	ExEd-P1		
2.11.5	Report of program-wise payment status (pending, approved, disbursed) of guest faculty for any given period	ExEd-P1		
2.11.6	Analytics of program participation and revenue by customer organisation individually or consolidated up to its parent organisation (if defined)	ExEd-P1		
2.11.7	BI dashboards as per IIMU requirement	ExEd-P2		
2.12	Integration Requirements with other systems			



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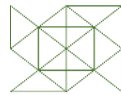
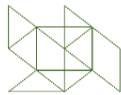
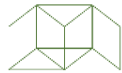
Indian Institute of Management Udaipur

2.12.1	Ability to integrate with D365 FO ERP to post all kinds of invoices and payments collected either in real time or in scheduled batches, and to process refunds approved by ExEd office	ExEd-P1		
2.12.2	Ability to integrate invoice and payment posting to D365 in multiple currencies	ExEd-P1		
2.12.3	Ability to receive information from the D365 FO system regarding refund disbursements and payment receipts and intimate the participant / organisation in their account and via email / SMS / WhatsApp	ExEd-P1		
2.12.4	Controls to ensure data consistency and integrity between the IIMU D365 FO ERP system and the ExEd platform	ExEd-P1		
2.12.5	Ability to push identified data elements into the proposed IIMU Data warehouse layer as per pre-determined schedule	ExEd-P3		
2.13	Audit trail and security			
2.13.1	Ability for maintaining audit trail for all data changes and actions along with "changed from" and "changed to" values, date and timestamp and userid	ExEd-P1		
2.13.2	Ability to view / download the system-maintained audit trail	ExEd-P1		
2.13.3	Ability to ensure good response time and performance of system with audit trail enabled	ExEd-P1		
2.13.4	Ability to define user roles, privileges, and user groups to administer data and functional security	ExEd-P1		



Financial quote elements-BoQ

Sl	Details	Note to Bidders
1	Cost of licences per year (Refer estimated counts in the Note to bidders)	<p>If there are more than one product in the total solution offering, provide the total per year license cost. The cost should be a bundled cost including the cloud infrastructure, platform and application costs.</p> <p>User base to be assumed: CRM Prospects (Unlimited), Academic programs Applicants per year: 2000, ExEd participants per year : 2000, Admissions operational users : 10, ExEd operational users : 10; System Admin users : 3 ; MIS reports users (unlimited)</p>
2	One-time implementation / configuration cost	<p>This should include blueprinting with Conference room pilots, configuration / development including customisations and external system integrations, Training and UAT, Staging and LIVE deployment, , Post go-Live hypercare until one complete cycle of every business process is concluded.</p> <p>This cost should also cover project management, delivery of user guides & process documentation as applicable to IIMU. While a single cost for one-time implementation should be quoted, the breakup of cost for the multiple phases may be provided for clarity. Payment milestone percentages for each phase will be decided with mutual consent after the contract is signed. User acceptance on LIVE for the agreed functionality phases will be the basis for payment milestones. Even if multiple products are involved, the bidder has to be responsible for the delivery of the functionality module and should quote the cost accordingly. Bidder should assume that the requirements provided cover 85% of scope of work and provision to include additional requirements/changes amounting to 15% of the overall implementation effort. The days deemed to be included may be quantified as 15% of 1st year cost / blended daily rate in the quote</p>
3	Data migration cost - one time	This cost should include effort of extraction, transformation and loading into the proposed platform, the admissions related data of past 6 years in order to facilitate analytics. The bidder has to own responsibility of the data migration
4	Cost of Integration with Student Information System of current ERP platform - one time	This integration is applicable only for pushing enrolment data of applicants of Degree granting academic programs from the Admissions platform of the proposed system to the SIS-ERP. Not applicable for Executive education functionalities. The bidder has to own the responsibility of the integration
5	Cost of Integration with Dynamics 365-FinOps System of current	This integration is applicable only for integrating the relevant invoicing and payments collection and reporting functionalities of Executive Education Modules in the proposed system. Not applicable for Admissions Module of degree granting programmes. The bidder has to own the responsibility of the integration



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भारतीय प्रबंध संस्थान उदयपुर

Indian Institute of Management Udaipur

	ERP platform - one time	
6	Annual maintenance/ support cost for the total solution implemented (product(s) and customisations)	This cost should include complete platform maintenance and augmentation on demand, proactive monitoring of platform health, uptime and performance. Should include platform (server, OS, Database and product) upgrades and re-certification of customisations and integrations post upgrade. Should include operational support of all implemented functionalities, assistance for changes configurable in the product(s), minor report changes, assistance for reporting / analytics, product issue resolution, issue resolution of customisations/extensions/integrations even if issues are discovered after PROD deployment. Under the AMC, Bidder should also include development of at least 4 additional reports / dashboards per year OR provide access, training and assistance to IIMU technical resource for development and modification of reports and BI dashboards.
7	Implementation of any enhancements beyond scope of work - Blended per-person day rate	Single per-person day blended rate, regardless of the skill type, skill level involved. Effort estimate will be mutually agreed upon for each change request
8	Implementation of any enhancements beyond scope of work - Single techno-functional resource dedicated to IIMU work	Bidder's Resource will work full-time for IIMU engagement, on any technical tasks assigned by IIMU
9	Overall scope of work	Bidders are advised to refer to detailed scope of work in Annexure XIII of tender document