

Minutes of Pre-Bid- Meeting

Brief Description: Hiring Agency for ERP Implementation For Quality Council of India

Date and Time for Pre-Bid meeting: February 15, 2022, 2:00 PM - 4:00 PM

Mod of Pre-Bid Meeting: Video Conference

The following Bidders' Representatives attended the pre-bid meeting:

S.No.	Name of prospective bidders/firm	Name and designation
1	S3 Infotech Private Limited	Raj kumar
2	Cloudstrats Technologies	Nisha Yadav
3	Corporateserve Solutions Pvt.	Anindita Chatterjee
4	All e Technologies	Gautam Kumar, Bhawani Singh
5	Microsoft	Alok Ratan Sharma
6	PositiveEdge Technologies	Sachin Diwan
7	Vserve consultants Pvt ltd	Gauravsingh Rajput, Parag Raibagkar
8	DEV Information Technology Ltd	Julie Roy
9	TCIL	Ranjana Singh
10	MKT Softwares (P) Ltd	Amit Tiwari
11	Oasys Cybernetics Pvt Ltd	Balajee

QCI officials were present in the pre-bid meeting to provide clarification to the queries.

In order to bring uniformity and clarity among the prospective bidders on various terms and conditions as mentioned in the RFP document, the queries received from bidder(s) during pre-bid meeting were discussed and clarified. The clarifications arrived thereof are indicated as under:

S. No.	Content of Para / Clause under Reference as per Bid Document	Queries/Suggestions	Response
1.	<u>Page No. 2: TENDER SUMMARY</u> 2 .Contract Duration	The Firm enquired whether the support contract is to be proposed for one or five years.	The support contract will be for a period of one year which will further be extended every year till a period of five years.
2.	7. Presentation Round	The Firm enquired about the parameters to be covered in presentation, will demo of product be considered, mode of presentation and tentative date of presentation.	As mentioned in Page No. 25:7. Technical evaluation criteria, Point 4. of the RFP. The mode of presentation will be virtual. The vendor is open to present as per their best experience and capability.
3.	<u>Page No. 3: OBJECTIVE</u> QCI intends to select an agency for providing ERP solution through this Request For Proposal for Analysis, Design ,Development, customization, Supply, Configuration, Operation, Rollout and Regular Update/ Upgradation & Maintenance of ERP system for QCI for a period of 3 years. RFP provides vendors with relevant operational, performance, application and architectural requirements of the system.	The Firm enquired what is the layout of the current system as it needs to understand the software used, its architecture and the details of the current vendor.	Currently for finance and accounts we are using Tally Prime.
4.	Rollout and Regular Update/ Upgradation & Maintenance of ERP system for QCI for a period of 3 years.	The Firm sought clarification on the period of support as support is requested for one year whereas upgrade mentioned is for 3 years.	The support is for the service/ implementation part.

5.	This RFP is envisaged for a comprehensive and integrated automation system for the key functions of QCI including but not limited to Finance, Human Resources & Project Management.	The firm asked whether HR and PM to be add-ons from other ISV or standalone applications integrated with ERP	The firm can propose a different application for HRMS which can be integrated with the ERP system.
6.	1. Operational excellence Integration and standardization—Finance, HR, Project Management and Procurement processes across the constituent Boards & Divisions of QCI The ERP is expected to bring all central functions together in a streamlined manner for ease of access and equitable implementation across all Boards & Divisions.	The firm enquired whether QCI already have HR and PM systems in place or needs to be considered as new implementation?	There is a HRMS system in place in the organization. The firm's proposed solution will be compared with the current HRMS system on different parameters based on which decision on continuation of current will be taken.
7.	<p><u>Page No. 4: 3. SCOPE OF WORK AND DELIVERABLES</u></p> <p>Deliverables:</p> <p>c. Training (Overview, Core and Train the Trainer): The success of any implementation depends on having well-trained end users who are comfortable with their knowledge of new business processes and have the required skill set to work within the designed processes and use the application. Initial and ongoing user training ensures successful adoption of the new processes and tools, which is a critical aspect of any implementation.</p>	The Firms asked about the number resources to be trained, levels of training required and frequency of training required .	Bidder has to suggest a training plan/methodology. Currently we are looking to train around 50 users.

8.	h. Final Data Migration: Transfer of opening balances in a new system.	<p>The Firms asked whether the data to be migrated is master data or transaction data.</p> <p>The firm asked whether historical data is to be considered for data migration or not.</p>	<p>Master and transaction from tally accounting software, for a period of around 5 years.</p> <p>In the second phase historical data of last five financial years will be required to be migrated to the system.</p>
9.	l. There are numerous web applications/portals in QCI through which payments may-be accepted. These portals along with GST and banks portals must be integrated with the proposed ERP solution before the Go-Live of core ERP solution.	The firm has asked for information on total no. of web applications/portals/banks to be considered for integration and what are their integration touch points? As the accurate number is important for effort estimate, project timeline and costing	As mentioned in Page No. 14:Other Features. At the time of final implementation correct numbers will come into picture. Vendor can make some assumptions and quote the price.
10	m. The bidder may propose the different types of tools for HRMS and project management that maybe integrated during the later stages of the project once the core ERP solution has stabilized.	The firm sought for clarity whether to use existing HRMS or propose new HRMS system implementation in RFP?	There is a HRMS system in place in the organization. The bidders proposed solution will be compared with the current HRMS system on different parameters based on which decision on continuation of current will be taken.
11	<p>Page 5.</p> <p>a) Finance and Accounts Module v) Grants vi) Treasury</p> <p>System should have the trigger option wherever required as per the requirement.</p>	<p>The firm sought clarification in the given module as this functionality is not available in BC and need to look into customization for addressing this module</p> <p>The firm enquired about the expectation here.</p>	<p>The customization cost can be added as a part of implementation cost.</p> <p>Report requirement for tracking the grants in terms of its utilization and other details for specific projects.</p>

	The system should have specific Demarcation of each bank/cash account, it might be at board/ division level	The firm need to understand the limitations.	The system should go through an approval process before making payments
12	<p>viii)General Accounting</p> <p>The System shall allow the creation of a suspense account to hold transactions with errors that can be processed and classified at a later date.</p> <p>Cash transactions accounting</p> <p>The system must have the facility of consolidating information across the independent GLs for month-end reporting purposes</p> <p>Any changes made to ERP financial transactions should reflect information about who, what, why and when the change was made</p> <p>System should be able to track any duplicate transactions</p> <p>Ability to send Emails and SMS</p>	<p>The firm asked what is nature of Suspense Account. What is expectation here?</p> <p>The firm asked is there any daily cash payment limitations?</p> <p>The firm sought elaborative response on this point</p> <p>The firm sought elaborative response on this point</p> <p>The firm sought elaborative response on this point</p> <p>The firm asked which transactions /Information are required to be applicable for Email/SMS</p>	<p>Need to be opened to park the intermediate entries</p> <p>There are no defined limitations ,it is required for petty expenses</p> <p>Report requirement for consolidation of data from all GLs ,depending on the the chart of account created on system.</p> <p>The system should be able to generate an audit trail of changes made in the system or financial data</p> <p>System should alert similar kind of transaction has taken place</p> <p>The system should have ability to send Emails and SMS to external parties.</p>

	Ability to maintain multiple companies (Legal Entities)	The firm enquired about the number of legal entities?	Number of legal entity is one.
13	<p>ix) Accounts Payable</p> <p>Ability to modify vendor master through appropriate controls</p> <p>System should have only unique vendor account across every board and division.</p> <p>Ability to maintain preapproved vendors so as to generate POs against such vendors automatically.</p> <p>Has the ability to blacklist vendors.</p> <p>Ability to receive expense claim form/ expense report from Assessor through System</p>	<p>The firm enquired whether the authorized person can modify this.</p> <p>The firm asked are Board and Division part of same company or can be part of separate legal entities?</p> <p>The firm asked whether the vendors have to be approved .The firm asked about the basis for requirement of creating PO Automatically?</p> <p>The firm asked whether the vendors can be blocked.</p> <p>The firm enquired whether there is a requirement of Employee Expense Re-imbursment Module?</p>	<p>Yes, they can</p> <p>All the Boards and Departments are part of single legal entity</p> <p>The system should have ability to raise PO automatically with date as the criteria.</p> <p>Yes</p> <p>The system should have a module wherein claim forms can be uploaded .It should contain different invoice templates for different types of customers. It should be covered in HRMS.</p>
14	<p>xi) Revenue and Accounts Receivable</p> <p>Ability to set up user-defined invoice templates for specific type of clients or specific nature of projects .Ability to</p>	<p>The firm sought elaborative response on this. The firm further enquires if the point refers to Invoice Print Templates? The firm</p>	<p>The system should have the option to create different templates which should accept</p>

	<p>update invoices on projects on various options such as "milestone basis/date basis/ duration basis"" and "continuous basis", "Per Unit/Sample/Location basis"</p> <p>Ability to generate invoices, journal entries and post it to WIP on a periodical basis.</p> <p>Ability to track for provisions or for bad debts against invoices (full or partial) with appropriate approval workflow</p>	<p>enquired about the types of projects.</p> <p>The firm asked whether WIP calculation related to project to identify recognized Revenue and Costs?</p> <p>The firm asked whether there any Parameters for calculation of Provision or Bad Debts?</p>	<p>different criteria of making payments based on which invoice can be generated.</p> <p>The intention is to recognise the revenue until its booked</p> <p>We are looking for only finance and accounts entries</p>
<p>15</p>	<p>Page 11. b) Procurement, Inventory and Store Module</p> <p>System to allow the PO span across different fiscal years, buyer groups, boards, divisions / cost centres etc.</p> <p>The system should have facility to store service / material contract documents of vendors</p> <p>Change request to be routed via tool as per defined approval matrix configured in system</p>	<p>The firm asked whether the system allows PO to be fulfilled across financial years. Is there anything specific to be handled for multiple financial years/Buyer Groups/Boards/Divisions/Cost Centers?</p> <p>attachement</p> <p>The firm asked about the approval matrix.</p>	<p>Yes, it can fulfilled across financial years.</p> <p>Yes, it is talking about attachment</p> <p>The system should track the approval matrix</p>

	<p>Vendor Performance Evaluation: The proposed tool to be utilized to automatically trigger to roll out/ reminder/ follow-up for the evaluation processing</p>	<p>The firm enquired about the expectations and parameters for Vendor Performance Evaluation?</p>	<p>Tracking matrix having feedback or remarks field. We will discuss this further during implementation</p>
<p>16</p>	<p>Page 12. d) Human Resource and Payroll Module</p> <p>System to have an Employee Self Service portal (for leave request, approvals, viewing salary details, BTF, ECF, or handling any employee requests), etc.</p> <p>System to maintain a complete track of employee learning and development such as trainings, speaking events, conference presentations, etc.</p> <p>System to maintain various types of compensations schemes and payroll</p>	<p>The firm has asked for details of existing system and its capabilities for integration with BC. The firm further enquired whether APIs be provided to them by QCI and do the existing HRMS have all capabilities as per the scope mentioned in the RFP?</p> <p>The firm enquired whether it can propose third party HRMS solution and they will bid seperately for HRMS</p> <p>The firm asked for elaborative response on what BTF and ECF stand for?</p> <p>The firm asked for the elaborate use case explaining the tracking of "Speaking events, conference presentations etc."?</p> <p>The firm asked by Region, did you mean domestic regions like North India, South India, or International Regions like Europe,</p>	<p>QCI currently uses the Qandle HRMS. Bidders can evaluate the same and propose either the same or a different solution. If any APIs are required, QCI will facilitate their provision.</p> <p>Yes, they can propose separate solution</p> <p>The term BTF stands for Before the fire(termination) and ECF stands for Employee Change Firm</p> <p>The system should have a training module for scheduling events.</p> <p>The term region refers to Indian regions</p>

	packages (as per the local country or regional regulations).	North America?	
17	e) Other Features There are at least 30 such portals to be integrated.	The firm has asked for information of these portals. What are these portals and what are the integration touch points? Are API's available already? How many Banks are to be considered for integration?	The firm can provide per bank wise cost. To be answered by team. The firm can provide per bank wise cost. At the time of final implementation correct numbers will come in to picture. Vendor can take some assumptions and quote the price. A total of 6-7 banks are to be integrated.
18	Reporting and Compliance Requirements	The firm asked whether training to users on report development is to be considered or not? QCI may re-consider this requirement as report development involves fair technical knowledge of entire system and IT skills	Training to users on report development to be considered as training requirement.
19	Bill receivable/payable scheduling functionality based on given criteria (NABL , NABH, milestone completion % wise etc)	The firm asked what are the parameters applicable for receivable/Payable as per NABL, NABH?	There is no different criteria for bills payable and receivable for different boards.
20	Page No. 18 :Technical Requirement 1. (2) No. of Users (ERP)	The firm asked to provide count of Full users and users who need read only and approval rights	Considering the scope, vendors are requested to suggest the best user type as per the scope mentioned in the RFP
21	2. (1) Functional Resource	The firm has requested for relaxation in this clause.	Otherwise the person should have experience in Finance and Accounts for 10 years.
22	2. (7) Change Management	In the firm's view, the concept of change management proposed is not the standard way of doing changes in the project. The proposed methodology will lead to a lot of	Already in our RFP, we have requested the vendors to suggest us a quality change management plan.

		changes leading to confusion and conflicts. This point needs to be removed. Change Management should be followed as per change management process of the IT agency.	
23	2. (9) Quality Plan (QC)	The firm enquired whether there will be no involvement of any external agencies for QC..	The firm should suggest a Quality Plan and execution can be done by either firm and QCI or both as per the suggestion of the firm.
24	<p><u>Page No. 21: 4. PRE-QUALIFICATION CRITERIA</u></p> <p>2. The bidder must be a Microsoft partner and should have been engaged in the job of implementation, maintenance & support of Tier-1 ERP projects (Microsoft Dynamics 365 ERP) in, Central/State Govt/PSUs/Autonomous Organization/private during the last 5 years.</p> <p>Copy of Purchase Orders & a Completion Certificate a. 2 with government (minimum 30 lakhs each for implementation services) or b. 4 with Private (minimum 30 lakhs each for implementation services)</p>	The Firms has requested for relaxation in this condition.	Already this has been designed as we are looking for experienced partner.
25	<p><u>Page No. 22: 5. SPECIFIC TERMS AND CONDITIONS</u></p> <p>i) The bidder shall design, size, purchase, install, configure, commission and</p>	The firm seeks removal of this clause as it don't provide and maintain hardware.	It is a conditional clause which is only needed when hardware is a requirement.

	<p>maintain the software and hardware components, if any, for the solution implementation as per the minimum requirements provided hereunder. These requirements need to be addressed by the Bidder while recommending Hardware for the solution. Bidder would be responsible for the entire infrastructure including maintenance of the infrastructure and any structured cabling (LAN / SAN) requirements interconnecting the racks, if any required.</p>		
26	<p>ii) Bidders have to size and propose the hardware infrastructure, if required, to host the applications as part of the Integrated Systems Solution duly meeting the SLA requirements. The Bidder would have to identify infrastructure requirements which will include server, storage, backup, operating system, database, network, security etc. The sizing needs to be done keeping in mind clients requirement for performance, response time and scalability, latest state-of-the-art, virtualisation & guaranteed uptime during its entire lifespan with uninterrupted services</p>	<p>In the firm's view this is SaaS solution wherein all this is managed by Microsoft</p>	<p>Since no hardware is required in SaaS Model, this will be relaxed.</p>
27	<p>iii) QCI is not responsible for any assumptions or judgments made by the Bidder for arriving at any type of sizing or costing. QCI at all</p>	<p>In the firm's view this is SaaS solution wherein all this is managed by Microsoft</p>	<p>Wherever, QCI has asked the vendor to take the assumption, they can take it.</p>

	<p>times will benchmark the performance of the Bidder to the RFP Documents circulated to the Bidder and the expected service levels as mentioned in these documents. In the event of any deviations from the requirements of these documents, the Bidder must make good the same at no extra costs to QCI within two weeks of detection of the deviation, in order to achieve the desired service levels as well as meeting the requirements of these documents.</p>		
28	<p>Page No. 24: 6. TIMELINE The contract for implementation will be valid for a period of 1 Year from the date of Go-Live</p>	<p>The firm asked what would be the scope of the support? How will the Change Requests or Enhancements in the application handled during support period?</p> <p>In the firm's view the implementation methodology and payment terms are as per traditional waterfall approach. We recommend Hybrid Agile framework; Are we allowed to use this or we need to follow the one mentioned in the RFP?</p>	<p>Support will be for a period of one year. The firm can provide per man-day/week/monthly consideration as part of the financial bid.</p> <p>Bidder can suggest his methodology. We will assess it and decide accordingly.</p>
29	<p>Duration & Timeline and payment milestone</p>	<p>In the firm's view, 3 weeks of development period assigned is considered highly insufficient given the scope of development. It is suggested that timeline for development be increased to six months as there are areas which lack clarity as of now and a reasonable estimate of the timelines</p>	<p>As mentioned in the RFP, the bidder can suggest their plan for development.</p>

		<p>can be arrived once the clarity is provided.</p> <p>The firm enquired about the training frequency and locations expected? Is the training envisaged during the support period? If yes, what would be the duration and frequency?</p>	<p>Suggestion by firm for training frequency may be incorporated .The locations wpuld be Delhi NCR(Delhi and Gurgaon).The training would be envisaged during the support period .The firm can mention their training approach in the proposal .along with the restrictions in the proposal</p>
30	<p><u>Page No. 26: 7. TECHNICAL EVALUATION CRITERIA</u></p> <p>4. .Technical Presentation - Demonstration of the proposed software solution (currently in use by some clients) having functions as per the requirements in the RFP.</p>	<p>In the firm’s view demonstration of full-fledged application of another client is not feasible as we are bound by NDA clause with our clients which makes such demo illegal and breach of contract. However, a features and functionalities covered can be showcased in a presentation.</p>	<p>As mentioned in Page No. 25:7. Technical evaluation criteria, Point 4. of the RFP.</p>
31	<p><u>Page No. 33: Financial Proposal</u></p> <p>Part A -Backup services cost</p>	<p>The firm enquired as BC is SAAS based and hosted by Microsoft, this cost is not applicable. Request confirmation and consider deletion of this line from financial proposal.</p>	<p>If not applicable, this can be relaxed. Vendor has to suggest.</p>
32	<p>Part B</p>	<p>The firm enquired why only the license cost of HRMS is included in the financial proposal. However, there will an implementation cost involved in</p>	<p>As mentioned in Page No. 33:Financial Proposal, Part-B of the RFP.</p> <p>Number of licenses -around 1000</p>

		operationalizing the HRMS solution. It is requested to include a column for the same in financial proposal.	
	Other queries		
33		The firm asked for inclusion of the Microsoft Dynamics 365 FO ERP	No changes in the clause
34		The firm asked to also mention 1 PSU order implementation above then INR 30 Lakh (Implemented module - Finance and Accounts Module, Procurement, Inventory and Store Module, Human Resource and Payroll Module, Other Features, Reporting and Compliance Requirements)	Copy of Purchase Orders & a Completion Certificate a. 2 with government (minimum 20 lakhs each for implementation services) or b. 4 with Private (minimum 20 lakhs each for implementation services)
35		The firm asked that due to last year pandemic situation company facing lots of financial issue and turnover goes down. So that also consider minimum INR 3.5 Cr turnover on 2018- 2019,2019-2020,2020-2021.	5 cr turnover requirement has been made already considering the pandemic
36		Mark also this point – One any PSU order detail where implementation going on/done	Copy of Purchase Orders & a Completion Certificate a. 2 with government (minimum 20 lakhs each for implementation services) or b. 4 with Private (minimum 20 lakhs each for implementation services)
37			

		The firm asked that due to pandemic situation in last two years, we are here by requesting you to consider the last three-year turnover with minimum INR 3 crore also for participation.	This 5 cr turnover requirement has been made already considering the pandemic
38		The firm enquired whether SI must be Microsoft Gold Partner	Gold Partner is not necessary. They should be Microsoft partner for ERP Implementation
39		The firm asked whether BOQ need to update for pricing	The query is not clear. The specific bidder may contact the procurement team for any clarification latest by 22-Feb-2022 5PM.
40		The firm seeks modification in Time Line to minimum 6-8 Month	The vendor can suggest their plan for implementation and development
41		The firm enquired about the License and Implementation Payment terms and condition	It is mentioned in the RFP
42		The firm asked for license payment advance at the time of signing the agreement	The contract will be for one year but the payment will be done quarterly only.

- ❖ All above points are noted and agreed by the firm.
 - a. These minutes of pre-bid meeting shall form the part of bid document/Agreement.
 - b. Rest of the terms and conditions and specifications of the bid document shall continue to remain same.
 - c. The above amendments/ clarifications are issued for the information for all the intending bidders.
 - d. The submission of bid by the firm shall be construed to be in conformity to the bid document, Corrigendum and amendments/ clarifications given above.