



Indian Institute of Banking & Finance

**CIN: U91110MH1928GAP001391
(ISO 21001:2018)**

**Corporate Office
2nd Floor, Tower I,
Commercial II, Kohinoor City,
Kirod Road, Kurla – (West)
Mumbai – 400 070.**

REF NO: RFP-2024/25-IT-01

**REQUEST FOR PROPOSAL (RFP) FOR DESIGN, DEVELOPMENT OF NEW
WEBSITE, PORTAL AND BACK-END SYSTEMS & MIGRATION OF EXISTING
DATA, CONTENT OF WEBSITE AND
HOSTING & MAINTAINING IT IN A CLOUD ENVIRONMENT ON A TURNKEY
BASIS**

TO BE SUBMITTED ON OR BEFORE 19th August 2024

ADDRESSED TO:

**Chief Executive Officer
Indian Institute of Banking & Finance
Corporate Office
2nd Floor, Tower I,
Commercial II, Kohinoor City,
Kirod Road, Kurla – (West)
Mumbai – 400 070.**



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1.About IIBF:

Established in 1928 as a Company, Indian Institute of Banking & Finance (IIBF), formerly known as The Indian Institute of Bankers (IIB). IIBF is a professional body of banks, financial institutions and their employees in India with a mission to develop professionally qualified and competent bankers and finance professionals primarily through a process of education, training, examination, consultancy/counseling and continuing professional development programs. During its 96 years of service, IIBF has emerged as a premier institute in banking and finance education for those who employed as well as seeking employment in the sector. Since inception, the Institute has awarded several banking and finance qualifications, viz., JAIIB, CAIIB, Diplomas and Certificates in specialized areas and helped in sustaining their professionalism in banking and finance through continuing professional development programs.

IIBF is a ‘Distance Learning’ Institute. The candidates who appear for examinations, get adequate educational/knowledge inputs through various educational services offered by the Institute. The pedagogy of Distance Learning offered by the Institute is given below:-

- Publishing specific courseware for each paper/examination;
- Tutorials from accredited institutions;
- Contact classes;
- Video lectures;
- Virtual classes
- E-learning through portal;
- Campus training for selected courses, etc.

As a professional body, IIBF ensures that its members are enriched by latest developments and updated knowledge of the profession they practice. Towards this end, the Institute offers a daily e-news letter called “Fin @ Quest”, a monthly bulletin – “IIBF-Vision”, a quarterly journal – “Bank Quest”. It also sponsors research in banking & finance and publishes the research reports. The Institute offers Management Development courses in collaboration with leading Management Institutions, besides organizing Seminars, Workshops, Conferences, Lectures, and short duration programs, etc., as part of Continuing Professional Development(CPD).

The Institute’s Governing Council consists of eminent personalities from the banking and finance sector, academicians and professionals.

IIBF is an ISO 21001-2018 certified organization having its Corporate Office in Mumbai and Professional Development Centers in Delhi, Chennai, and Kolkata.



2. Major Activities of the Institute:

1. Membership: The number of ordinary and non members of the Institute as on 31st March-2024 were 1080531 and 1773951 respectively. There are 834 active Institutional members (Banks and Financial Institutions).

2. Courses Offered/Examinations Conducted: The Institute currently offers the following courses:

2.1 Flagship Courses:

- **JAIB**
- **CAIB**
- **Diploma in Banking and Finance**

2.2 Diploma Courses:

Diploma in Treasury, Investment and Risk Management, Diploma in Banking Technology, Diploma in International Banking and Finance, Advanced Wealth Management Course, Diploma in retail Banking etc.

2.3 Certificate Courses:

Certificate course in Anti- Money Laundering and Know Your Customer, Trade Finance, Information System Banker, IT Security, Cyber Crimes & Prevention of Fraud Management, FEMA, Rural Banking, Emerging Technologies, Strategic Management & Innovation in Banking etc.

2.4 Blended Courses:

Blended courses in Credit Management, Treasury, Compliance, Risk Management, Accounting & Auditing etc. (For details visit- www.iibf.org.in)

All these examinations are backed by specially developed courseware. The Institute revises publishes these courseware from time to time. The courseware are available with the publishers' viz. M/s Macmillan India Ltd. M/s Taxman Publications Pvt. Ltd and also with leading book shops.

3. Existing Application Systems Used by IIBF:

3.1 Web Site: The web portal disseminates information with regard to Institute's profile, its products & services.

3.2 Online Transaction Portal:

The online transactional portal offers registrations of various examinations, membership, training and other activities over web in online mode including all payments via payment gateway. The portal also offers educational support towards various courses(examinations)



through e-learning and video lectures. These support services are rendered by respective service providers.

3.3. Back-end Applications

The back-end application primarily comprises of Candidate Life Management System (CLMS), E-certificate, Training Management System.

(i). CLMS – Candidate Life Management System is consisting of examination, membership systems.

- (a) **Membership:** This module helps to enroll all kinds of members of the Institute. There various kinds memberships offered the Institute. 1. Institutional members for banks and NBFC 2. Ordinary Members 3. Associate members and 4. Institutional Members. This module also has KYC (Know your member) verification facility.
- (b) **Examination:** This module caters for enrolment of 50 plus examinations in individual and bulk mode basis. The module helps to process the results for dispatching digitally signed certificates. This system also covers various other modules such as recording unfair details, scheduling of examinations, uploading the score data received from testing agencies and processing of the results. There is an e-certificate module for generating and dispatching around 4 lakh digitally signed certificates in a year. Electronic certificates are delivered to recipients via secure channels, such as emails, and can be downloaded by candidates through OTP from Institutes portal. The application also has a provision to verify the digitally signed certificates through an URL and a QR code embedded on the certificates.
- (c) The examination system has also got separate modules for BC/BF and DRA registrations, where training are conducting before enrolment of examinations. After successful completion of training the candidates could enroll for these examinations.
- (d) **Back-end Change approval:** Certain exceptional changes to be carried out through this module with proper approval from the concerned head of the depts.

(ii) Training Module – The Institute Conducts Open & Customized training programs along with Blended ones on regular basis. Further the Institute also conducts programs on soft skills, leadership qualities. The training module maintains entire training details of the Institute. Further, it also maintains the faculty details, payment details etc.,

(iii) Complaint Management System - Complaint Management System (CMS) helps to redress and resolve the grievances received from members / non-members. The candidates can submit the grievances through a web interface and as well as through a common e-mail.

(iv) Internal Ticket System - Internal Ticket System helps to record various system related issue from user departments. The system tracks the issues raised by the users and displays it's current status.

3.4 Third Party Integrations

Presently, the Institute uses a payment gateway services from M/s Billdesk. In addition, certain other wallets such as a wallet from M/s CSC also used who conducts remote proctored exams of the Institute.



3.5 Testing Agencies

The Institute conduct all its exams with the help of third party testing agencies such as NSE IT, CSC, Team Lease, Sify, Flipick etc. The scores data received from said agencies through Cron, APIs and FTP.

3.6 SMS Gateway

SMS gateway is integrated with portal for all communications / notification, Login with OTP functionality.

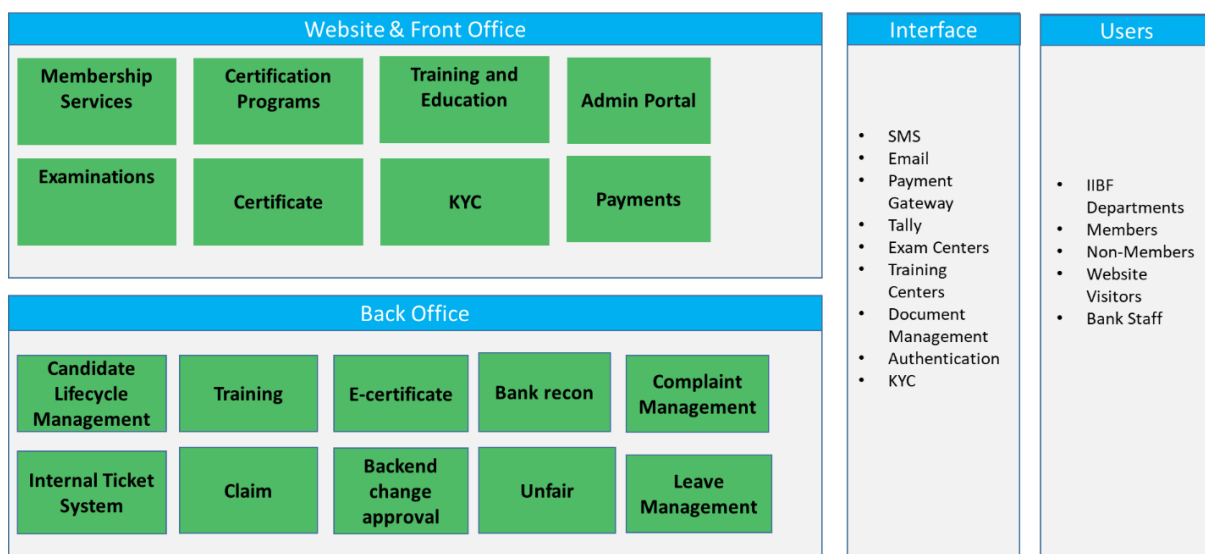
3.7 E-Learning

The Institute avails e-learning services from third party. The portal helps to link the e-learning services with vendor such as Team Lease etc. The e-learning registration data is shared through FTP/CRON with the vendor/s.

3.8 Bank-reconciliation Module: This module helps to re-conciliate all invoices generated on the transactional portal against the payments received in the various bank accounts.

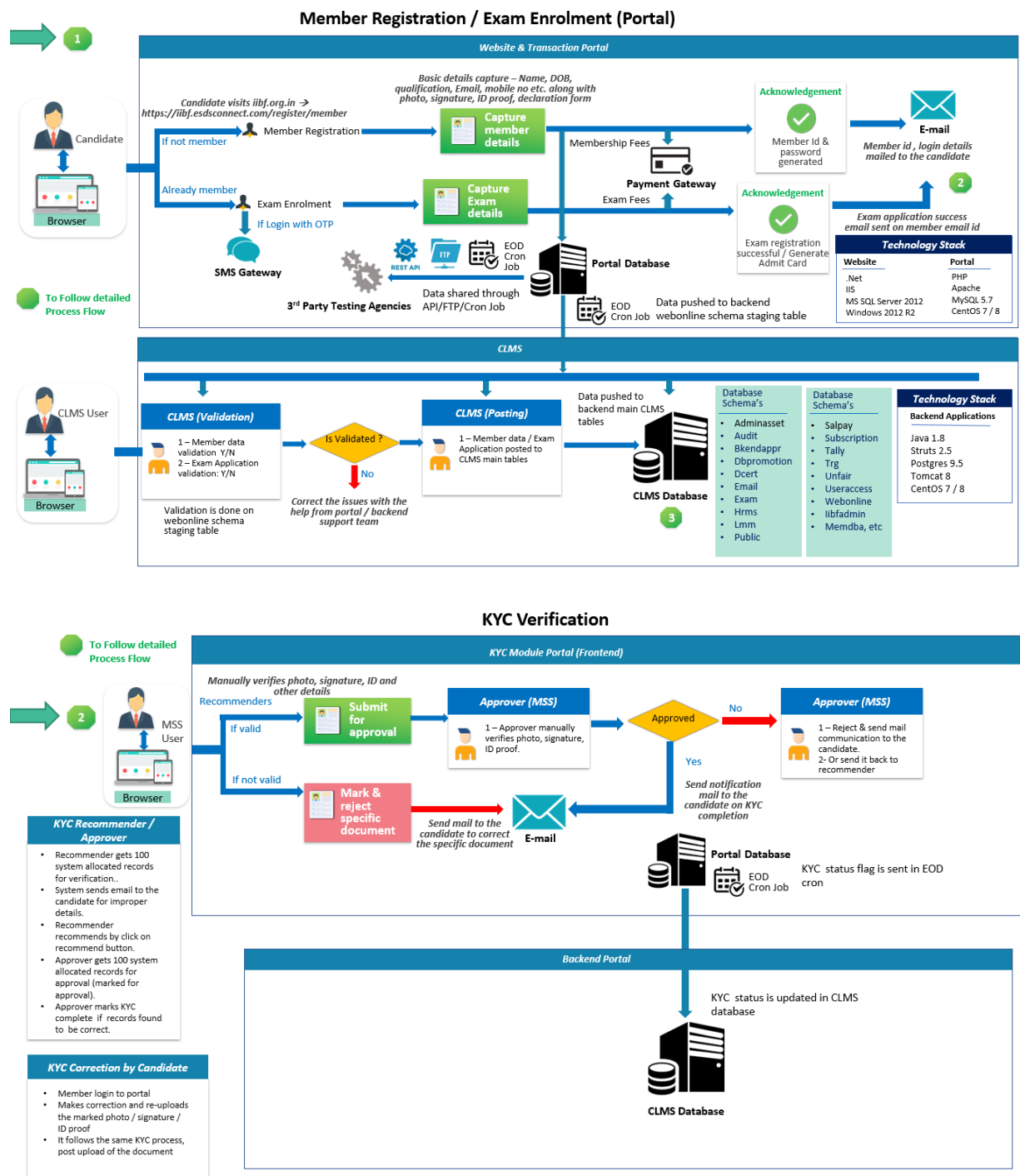
3.9 Admin Portal: Admin portal acts as dash boards for viewing day to count of registrations of membership, Examinations, for viewing and editing of profile of candidate

3.10 Block Diagram of the Existing Applications :



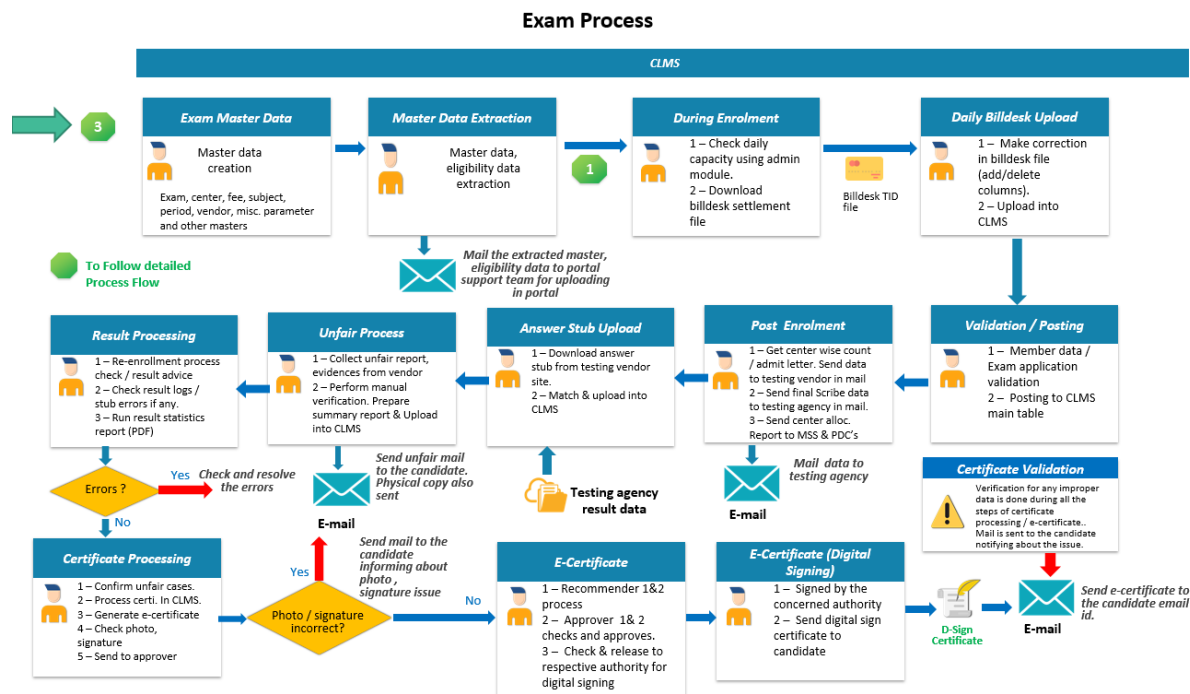


Block diagram of Existing application flow:





Request for proposal (RFP) for design, development of new website, portal and back-end systems & migration of existing data, content of website and hosting & maintaining it in a cloud environment on a turnkey basis



4. Introduction to the Assignment (Broad Requirements):

The Indian Institute of Banking & Finance (IIBF) desires to select a service provider who would Develop, migrate, customize, update and maintain the website, Transactional Portal, and internal back-end systems on a turn-key basis. The internal back-end system broadly covers major departments of the Institute viz., membership, examination, training and academics. The Payroll and Accounts activities are handled through different vendors like Paysquare and Tally respectively.

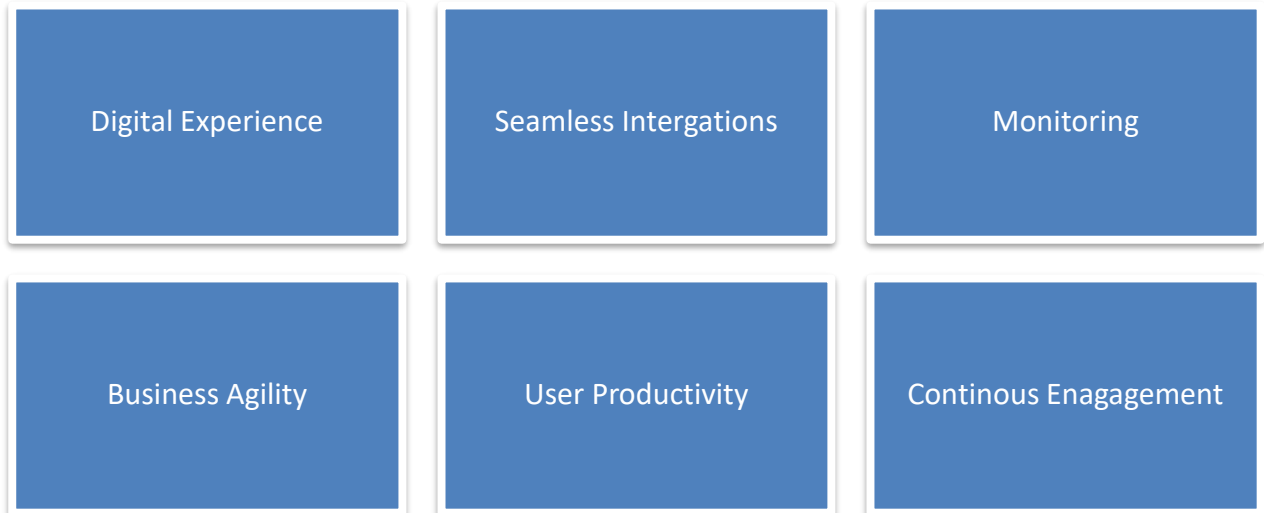
4.1 About The Project

The Indian Institute of Banking & Finance (IIBF) invites open tenders from prospective bidders to design, develop, host, manage and maintain new application systems as **turn-key project**. The detailed scope of the work shall be finalised in the “System Requirement Specifications” document before commencement of application development. The bidder also should install, configure, port applications in the new hosting environment. The bidder should map and migrate entire existing data of all applications systems into the new hosting environment. The bidder should also install, configure and migrate the existing accounting software such as tally along with entire accounting data into the new hosting environment. All the application systems should be hosted, managed, and maintained at least in a tier-III or higher level data centre located within India.

In this connection, the Institute wishes to invite bids through this RFP (Request for Proposals) from reputed and experienced bidders. The bidders have to offer an end-to-end solution as a turn-key project as per the requirements of IIBF. The project should be developed using the state-of-the-art technologies which should be scalable vertically and horizontally based on future requirements of the Institute. The solution should adhere to all technical, functional requirements mentioned in this RFP and should meet all future requirements of IIBF to achieve its vision and objectives.



The project should help the Institute to achieve the following aspects for better customer satisfaction.



4.2 Implementation

The identified bidder is responsible to carryout below given activities during the project development and implementation.

- Impact assessment
- Project management
- Gathering user requirements, Planning, Analysis, design and development of the new application and deployment.
- Integration of newly developed application with third-party systems as required.
- Creating hosting environment, manage and maintain the same.
- Creating a system Testing/UAT environment
- Users training
- Submit SRS, Functional Level, High Level Design Documents, Technical Specification Documents/ER Documents and Users Documentation

Further, the bidder shall also submit the following documents for each phase of the project by activity wise.

Project Stages	Deliverables
Planning	Project Plan, Communication and Escalation Plan, Weekly Status Updates, Risk & Issue Log, Defect Log, Change Register
Systems Requirements Gathering and Systems Design & analysis	Submit SRS/Functional Level, High Level Design Documents, Technical Specification Documents/ER Documents and Users Documentation. Interfacing documents(wire frames), Gaps and description, Prototype(POC) and firmied up Software & Hardware Requirements
Development	Source Code and related build/ make files, Unit Test Plans & Results, Code Review checklists, Online Help



Testing & Training	Creating a system Testing/UAT environment, System Testing Plan & Results, User Acceptance Testing Results, Performance Testing (Stress / Load) Plans & Results and record the Issues. Offer users training
Parallel run	The old systems and new systems should run parallel for a period of 90 days and old systems could be discarded thereafter.
Go Live	Backup Schedule & Register, Disaster Recovery Plan, Deployment Checklist, Release Notes
Transition to IT department (knowledge transfer)	Updated User Manual, Process Documents (New Group Setup, New User Setup), Contact List, Lessons Learnt

5. RFP Document

A detailed RFP Document covering the eligibility requirements, technical specifications, terms & conditions, statement of work, and service agreement can be downloaded from the Institute's website <http://www.iibf.org.in>

6. Adherence to Terms and Conditions

The bidders are advised to submit the bids adhering to all the terms & conditions contained in this RFP including other specifications and amendments, if any, issued by IIBF prior to submission of RFP. The bidders should comply with the formats prescribed in the RFP documents strictly. The bids that do not strictly adhere to the terms and conditions of this RFP are liable for summarily rejection.

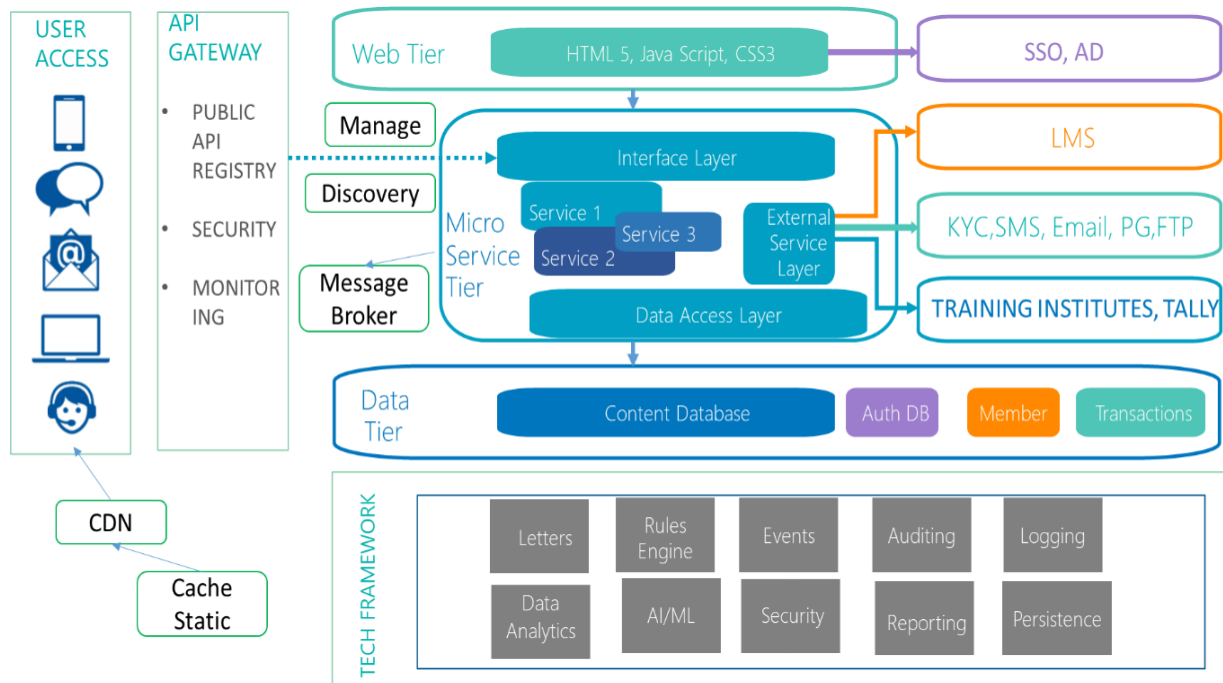
7. Brief Scope of the Work, Specifications and Requirements (on turn-key basis):

7.1 Scope of the Work:

Architecture of the new Applications:

Application Development:

We propose to develop the new applications with state-of-art technologies such as Micro Services architecture which should be cloud native and portable on any kind of cloud hosting environment.



a). The assignment requires development of a new **website with Chabot functionality**, back-end systems and transactional Portal. The transactional portal/back-end systems includes development and maintenance of various modules of

- Membership System along with KYC module
- Examination System:(to cater for 50 plus different courses covering individual and bulk registrations. Few examination enrollments should be accessible globally as and when required. The system should be capable of issuing at least 4lakh digitally signed certificates per annum.).
- E-Learning(Academics related)
- Training System
- Compliant Management System
- Internal ticketing System
- Integration of a FinTech solution for financial transactions
- Bank reconciliation
- Accounting web interface for GST (for B2B, B2C)
- Exceptional Handling module through back-end
- Admin Dashboard for all systems

The system should take care of registrations of memberships, examinations, accept payments, generate receipts, invoices, credit note where refunds to be made. Generate admit cards, allocate candidates for venues based on centres. Generate reports towards unfair activities. Serve notices toward unfair incidents and penalize with quantum of punishments. Integrate with



candidates score data automatically from third party testing agencies and process the results. Issue result advices/part completion, maintain history of marks, attempts and generate digitally signed final certificates and dispatch the same. The systems to be developed should be highly agile, parameterized and customizable to cater the new exams/trainings launched by the Institute from time to time.

The indicative list of functional modules of all systems are mentioned in Annexure – V(The final list shall be decided at the time of gathering the user requirements and preparation of SRS documents)

b). The assignment further required to carry out the following activities:

- (i) One time migration of the contents of existing website and maintaining the same.
- (ii) One time migration of existing databases of transactional portal and back-end systems into a new hosting environment.
- (iii) To maintain the look and feel of the new website and transactional portal on a turnkey basis.
- (iv) It is also required to take care of updates in the form of changes / additions / deletions/modifications of the contents of the Institute's new website (www.iibf.org.in) on regular basis.
- (v) To revamp the look and feel of the website with new templates once in a year.
- (vi) The bidder should use the images of national identity symbols namely flag, national emblem, map etc., from Government of India sources in case the same are required on the website.

c). Current Technology Stack: Presently, the front-end and back-end are running in two different databases and the data is synchronized by way of cron jobs at the end-of day. The back-end is running on CentOS with PostgreSQL with java based applications. The front-end of the website is running on .Net and transactional portal is running with PHP programs on Red Hat Linux with MySQL. The bidder should integrate the technology stack of front-end and back-end into a single platform.

d). The bidder has to capture the requirements from user departments/stakeholders of IIBF in co-ordination with IT dept. to design, develop, host and manage new application for Membership, Examinations, Training, Academics and HR departments. And the bidder should also to develop an interface to extract the online payment details as per the requirements of Accounts Department of the Institute.

e). The bidder has to develop the new application having the functionality of both the transactional portal and back-end systems into one by migrating legacy data to a single application platform, with a common database.

f). The bidder should have arrangement with third party to integrate the applications of the Institute to verify the KYC particulars of the members and non-members of the Institute. The KYC could be carried out using Aadhaar authentication/PAN authentication etc. The KYC module should also have the functionality of auto photo capturing through webcam with photo cropping facility with AI enabled functionality.

g). The bidder has to make a provision to provide a detailed audit trail for each application/module, each transaction/activity, tasks executed throughout application and or database.



- h). The bidder has to develop and design an administration module covering website/portal. The design should be structured such that most of changes like enabling / disabling/ updating of various services offered by the Institute should be through an User Interface.
- i). The Bidder should also provide a relevant performance-monitoring tools of APIs and application programs.
- j). The bidder should have an arrangement to trigger automated alerts, notifications through emails/ SMSs to all the members and non-members of the Institute for all services offered.
- k). The site should be tested against peak load of transactions on half yearly basis and certified documentation of such tests to be provided during the development and maintenance phase. The application should perform consistently during peak loads.
- l). The website and all applications should be responsive on all types of devices such as Mobiles (Android/IOS), Tabs, Laptops, Desktops and on browsers like IE, Chrome, Mozilla, Safari, etc.
- m). The bidder shall integrate all application programs/modules by payment gateways suggested by the IIBF. Further, the Bidder has to develop/consume APIs for exchanging data between various other agencies dealt by the Institute.
- n). The Institute offers enrollments for a certification course in Climate Risk and Green Finance for international candidates. The bidder has to make the provision to develop and hosting of such International courses also in secured environment. This exam should be hosted and managed in a separate hosting environment with different domain name.
- o). The website must take care of the backward/forward linkages with the back-end databases and all the applications currently used by IIBF such as payment gateway, examination system, mock test and membership systems etc., Currently, all the products and services of the Institute are offered online and are integrated with different payment gateways from M/s Billdesk and M/s CSC wherever applicable. The bidder has to take care of the existing linkages of third party also. The bidder should also take care new linkages that may required to be linked in future without any additional cost to the Institute.
- p). Bidder has to develop a Modules for Reconciliation of fees received through payment gateway/NEFT/ CSC Wallet for various services offered by the Institute like membership Services, Examination, Training, e-learning etc.
- q). For all financial transactions/payments that may happens over the portal, the bidder has to provide a mechanism to reconcile end to end of each transaction either it is success or failure by integrating a FinTech solution.
- r). Support & Migration of data during a parallel run: At the time of Production Deployment both applications (Existing and New) will be run parallel for a certain time period for smooth Functionality Testing. After successful verification and approval, the existing application will be sunset and the data entered during the pilot run will also have to be migrated to New System.
- s). Role based access and authorization of various modules: Multi Factor Authentication should be implemented. User management / Role profiling: Robust login system/ Secure Log-in



allowing stakeholders to access the system as per their roles / authorization thereby having retrieve & reset password facility on email / SMS.

t).The bidder has to run existing applications and website of IIBF and host it on new cloud platform, if outgoing vendor is unable to provide the support to IIBF till Go –Live of new application.

u) The bidder has to deploy sufficient resources for one time design, develop, deployment, migration of the contents of website and data of application systems to meet the time lines of project schedule as mentioned in the RFP clause no. 22.

Note: To gauge the volume of scope of the work, the bidder must go through current website of the Institute, check the transactional programs and back-end systems of the Institute i.e. **www.iibf.org.in**. **The service provider may arrive at actual time and efforts required before submission of the bids.** For clarifications and additional information the bidder may approach the institute in person or send the queries by e-mail which will be clarified in the pre-bid meeting as per schedule given under clause 10 of this RFP. The bidder may visit **www.iibf.org.in** to understand the existing details on the website. Before, submission of bids the bidders may be in touch with the Institute to understand further details of front-end and back-end applications systems.

Entire details of functional specifications/modules/reports shall be finalized at the time of preparation and finalization of SRS (Systems Requirement Specification) documents.

7.2 Project Governance

Putting a governance structure around IIBF's future IT implementation plan is essential to ensure that project implementation stays on track and achieves its strategies, objectives and goals. It acts as a mechanism to measure the progress of the implementation. Also, IT systems today are subject to many regulations such as governing data retention, confidential information, financial accountability and recovery from disasters. An IT governance framework is an efficient system to ensure regulatory compliance.

Overall responsibility for the implementation of all modules will remain with the bidder. Project progress review and monitoring will be the responsibility of bidder appoint a Single Point of Contact (SPOC) for entire project. Escalation of all issues related to the modules will be through this SPOC, who will also be responsible for reviewing the SLAs being met. For the project implementation phase, supervision and reporting during implementation will be responsibility of bidder.

7.3 Implementation and Support Services

The bidder offer the following services till go-live

- Management of installed Infrastructure
- Realization Configuration
- Customization
- Testing
- User Acceptance Testing
- Data Migration
- Training/Knowledge Transfer and Change Management



- Security audit
- OEM Audit Services
- Documentation
- Cutover and Go-Live

7.4 Testing

As part of testing, the bidder shall cover all activities during the development and implementation of application. The bidder shall create the test strategy document that defines the requirements and goals of testing.

(a) Baseline Testing

Baseline Scope Testing shall include: (a) Unit Testing: Testing of transactions and functions within modules and (b) Scenario Testing: Testing of business processes and scenarios.

Baseline Scope testing shall be carried out in three steps:

Define Baseline test cases:

1. Bidder shall develop the baseline test plan with scenarios and test data to be used for testing based on the test templates.
2. For simple transactions, testing (unit testing) shall be done straightforward during configuration and the results shall be recorded.
3. For transactions that are very complex involving multiple screens, functions and variations to run, the transactions shall be documented and tested with a Business Process Procedure, maintaining the test section with test conditions and variations of the standard transaction, or with case procedures, maintaining the test section.
4. Bidder shall use the Test Scenario template entering every single step (transaction) with input and output data to document process flows.

Create Baseline test plan:

1. Bidder shall organize and follow up the unit and scenario testing at the Function/Module level during Baseline scope testing.
2. Bidder shall assign timeframes and resources for testing.

Test Baseline:

1. Bidder shall use the Baseline test plan and the test cases to test Baseline configuration.
2. Bidder shall update the Baseline worksheet with status and completion date information.

(b). Development Testing

The bidder shall after development and customization/configuration of the proposed system, conduct tests to demonstrate that the system meets all the requirements of the Institute.



Based on these tests, a report would be submitted by the bidder for review and approval by IIBF. The test results and response times should be demonstrated by the bidder during the testing phases (System, integration & Stress and Load testing) to IIBF.

After development unit testing is completed, all customer-specific programs shall be included in the Integration Test.

(c). Integration & System Testing

The purpose of the Integration & System Test shall be to plan and execute the integrated components, including simulation of live operations, and analyse the results, important for the functional verification of the production system.

System Testing, as a second iteration, shall focus on the most important cross-functional scenarios.

(d). Load & Stress Testing

Load and stress testing would be conducted prior to commissioning & Go Live once the System developed and deployed. The bidder should develop a standard performance criteria plan. The bidder should use suitable simulation tools to carryout load and testing

(e). User Acceptance Testing

The bidder will develop acceptance test procedures and the same will need to be approved by relevant stake holders of IIBF. The purpose of this acceptance is to ensure conformance to the required process operations response time, the integrity of the application after installation, and to eliminate any operational bugs.

This will include:

1. Fine tuning of the application, ensuring all required related component software are installed and any debugging required.
2. The acceptance tests will be carried out before Go-Live at site.

7.5 Go-Live

IIBF will consider Go-Live date of the proposed system once “Certificate of User Acceptance” is provided to bidder. Final Go live: The system will be declared Final go live after UAT sign-off.

7.6 System Security and Audit Services:

a) The website must be protected from all kinds of security threats such as existing viruses, malwares, spywares, Trojans etc. the website should also be protected from any threats that may arise in future, including various kinds of hacking, DDoS attacks, SQL Injection etc. The bidder should also monitor the traffic entering or leaving the network. The bidder should configure entire hosting environment with appropriate security tools such as firewalls, intrusion detection systems (IDS), network segmentation, anti-malware tools, and Zero-trust Network Access (ZTNA) etc., to ensure the entire hosting environment tamper proof.



The bidder has to carry out the security audit covering the following.

- (i) Vulnerability Assessment and Penetration Testing(VAPT)
- (ii) code review,
- (iii) configuration review
- (iv) Develop Remediation plan to cover Patching and code fixes
- (v) The bidder should continuously monitor the logs using “Security Incident and Event management (SIEM)”

The security audit should be done on regular basis by a qualified Security Auditor empaneled by authorities such as Cert-in etc., Such audit certificates to be submitted to IIBF once in a year.

b). Bidder has to ensure that the all the portal applications should be secured from all kinds of cyber-attacks. The bidder has to proactively monitor the website, portal and backend systems against hacking and any other malicious attacks. The bidder has to submit a “Safe to Host” certificate before commissioning the hosting. Subsequently, the bidder has to renew the certificate on yearly basis and submit the same to the Institute during entire contract period.

c). The website must be secured by 128 bit SSL or higher encryption at client end, server end and also during the transmission of data. All Service end points expose to internet or internal systems shall be secured with 128 bits SSL or Latest version (Secure Socket Layer)/TLS (Transport Layer Security).

d). The bidder should ensure that the data should not be leaked or stolen by any unauthorized access. This should be taken care by deploying appropriate encryption techniques (at rest and during transit). Further, strict access controls, data loss prevention (DLP) mechanisms, should be put in place to prevent the data loss.(Ex. To prevent the ransomware infections).

e). The bidder should provide Privilege Access Management (PAM) to record users activity logs and grant appropriate privilege accesses to all users. The users should be authenticated as per the privilege access policy defined in the PAM before accessing any data/ systems. The PAM should offer complete audit trails of all kinds of systems and database activities.

f). The bidder should monitor all server software such as VMs, applications, databases to identify and mitigate various security threats in real time.

g). User Profiles and Account Management

The bidder should create, manage and maintain all the users of OS, databases, and applications as per the needs of the Institute. A dashboard for user management such as addition and deletion and granting of necessary roles to the users may be provided.

7.7 Cloud Hosting services:

a).The entire website, transactional portal and back-end systems, should be hosted in a Tier III or higher level cloud/ data centre environment. Bidders should have the cloud/data centre within India. The hosting service provider who offers the cloud/ data Centre services should be empaneled by MeitY (Ministry of Electronics and Information Technology). The proposed Data Centre should be successfully STQC audited. The DC and the DR should be in different seismic zones.



b). The cloud hosting services shall commence from the day of go live of the project as part of the AMC.

c). All system-level software such as servers, databases, application servers, web servers, SVN servers has to be taken care by the bidder. All kinds of enterprise software licenses including ATS should be procured by the bidder and Institute shall not pay any extra amount towards such licenses.

The bidder should create the following environments in the cloud.

(i) Development and Testing Environment

(ii) UAT Environment

(iii) Production Environment(DC)

(iv) Disaster Recovery (DR). DR is required only for full production site.

(v). Archival environment for data Retention: The Institute wish to retain old data in a archive environment. The bidder should create appropriate archival environment which should be accessible on demand. The sizing of the archival environment shall be determined at the time of go live.

(vi). Proposed solution to cover end-to-end provisioning of required IT infrastructure consisting of VM/server, Storage, operating system, database, Containerized/micro services orchestration, API gateways with all security features as mentioned in clause 7.6 of this RFP.

(vii). Provide SMS (Short Message Service) and Email services required to send and receive SMS and E-mails to end users of the web site as per business requirements of all application systems. The bidder to send at least 60 lakhs SMSs in a year towards all services. Over and above 60 lakh SMSs, the Institute shall pay separately per SMS. There will be no separate charges payable towards e-mail services.

(ix). The bidder should submit all documents pertaining to hosting environment including Technical & Architecture Design documentation, Standard Operating Procedures (SOPs) required for operations and management of services.

(x). The Bidder shall provide the tool to monitor the infrastructure proposed comprising of resource utilization of all the servers, storage, network devices, bandwidth, and facility to monitor the cloud environment.

(xi). IIBF and its appointed third-party auditors may visit the Bidder DC /BCP for auditing. The Bidder shall provide assistance and furnish the relevant information requested by the auditors.

(xii). Cloud dashboard should allow generating reports for trend analysis of system usage. There should be provision to generate historical reports of resources utilization.

(xiii). During the change from Primary DC to DR or vice-versa (regular planned changes), there should not be any data loss.

(xiv). Bidder would be responsible for Disaster Recovery Services so as to ensure business continuity of operations in the event of failure of primary DC and meet the RPO and RTO requirements.

- Recovery Point Objective (RPO) – 15 Minutes.



- Recovery Time Objective (RTO) – 2 Hours.

The service provider should offer dashboard to monitor RPO and RTO.

During normal operations, the Primary DC will serve the requests. The Disaster Recovery Site will not be performing any work but will remain on standby. During this period, the compute environment for the application in DR shall be available but with minimum possible compute resources required for a functional DR as per the solution offered. The application environment shall be installed and ready for use. DR Database Storage shall be replicated on an ongoing basis and shall be available in full (100% of the Primary DC) as per designed RTO/RPO and replication strategy. The storage should be 100% of the capacity of the Primary Data Centre site.

(xv). In the event of a site failover or switchover, DR site will take over the active role, and all requests should be routed through DR site. The pre-requisites to switch to DR should be shared and managed by the bidder.

(xvi). Whenever there is failover from primary DC to secondary (DR), compute environment for the application at DR site shall be equivalent to DC including all the security features and components of DC, without the failover components (without redundancy). The environments such as Development, Test, UAT etc., are not required at DR site.

(xvii). The bandwidth at the DR shall be scaled up to the level of Data Centre when DR is activated.

(xviii). The bidder shall conduct live DR drill once in six months by de-activating the Primary DC. All operations of DC shall be carried out from the DR Site. However, during the change from DC to DR or vice-versa (regular planned changes), there should not be any data loss. The DR drill report should be submitted to IIBF for compliance purpose.

(xix). Any lag in data replication should be clearly visible in dashboard and alerts of same should be sent to respective authorities.

d). Backup and Restore Services

Bidder has to take full backup of entire data including digitally signed certificates and application programs once in a week and an incremental back-up on daily basis. The back-up of application source code should be backed up in version control tools like GIT/ SVN etc. One copy of entire data and application programs has to be submitted to IIBF on Quarterly basis on an external hard drive. The hard drive for the back-up should be arranged and taken care by the bidder itself. The bidder should retain entire data of the Institute for 5 years (further, if the contract is extended for 2 more years then the data retention should be for 7 years). The bidder has to store the back-up media on off-site (other than DC and DR) in addition to the back-up submitted to the institute on quarterly basis.

The back-up services to be provided by bidder shall include:

- i. The bidder should take full backup in a week and incremental back-up on daily basis.
- ii. The back-up be restorable as when required by the Institute.



- iii. Real-time monitoring, log maintenance and reporting of backup status on a regular basis.
- iv. The bidder should manage backup media by testing, tagging, cross-referencing, storing, logging in fire proof cabinets (onsite and offsite).

7.8 Periodic reporting

The bidder shall submit the following period reports (but not limited to) to IIBF:

1. The bidder should provide the necessary reports of website and transactional portal such as traffic reports, visitor analysis, duration analysis, content wise analysis, top landing pages and top exit pages and other statistical reports as per IIBF's requirements. These reports may be fetched through Google analytics or any other similar tools and to be submitted to the Institute on regular basis.

2. Corrective Action report in response to the any audit findings/ other concerns as identified by IIBF and SLA Monitoring Reports

7.9 Network Connectivity:

(i) The bidder should ensure adequate Internet Bandwidth for entire website portal and back-end applications hosted in the DC. The bidder should provide multiple upstream providers so that if connectivity from either service provider goes down, redundancy is maintained.

ii). The bidder has to provide network connectivity between hosting environment (cloud /data-centres) and head office at Mumbai and all PDC offices located at Delhi, Mumbai, Kolkata and Chennai of the Institute.

- MPLS Line 10Mbps- between head office and data centre
- MPLS Lines 4Mbps-between data centre and each PDCs No: 4 units
- Point-to-Point line of 10Mbps-between data-centres and disaster-recovery sites.
- Unmetered Internet bandwidth at DC/DR for website/transactional portal and Bank-end

iii). The bidder has to take care the connectivity between head-office/ PDCs and disaster-recovery site in case DC fails without any extra network charges to the Institute.

- All the network connectivity should be offered over fibre-optics.
- The bidder should configure the MPLS for accessing the Intranet applications within the offices of Institute at Mumbai, New Delhi, Chennai and Kolkatta. In addition the bidder should configure and provide VPN services to access the Intranet applications.

iv). The bidder should configure the Network Time Protocol (NTP) Service such that all the devices in synch with their date/time.

v). The bidder should configure the Provide Privileged Identity Management (PIM)



7.10 Managed Services:

- a) All application systems deployed should be accessed through SSO (Single Sign on) for Authentication and Authorization through LDAP.
- b) The bidder should offer managed services towards system administration, database administration and network administration, etc. It includes installation of OS, databases, application servers, web-servers etc. The managed service should also cover version upgradation, patch management, release management etc.
- c) The bidder should take care tuning of internal and external applications, databases, and any other components provided as part of the solution to optimize the performance.

The bidder should offer the following managed services.

- Operating System Management
- Webserver Management
- Application Server Management
- Database Management Services
- Backup Management
- Firewall management
- Storage Management Services
- Network Management and Security Management
- Anti-virus
- LDAP
- Single-sign-on
- NTP
- VAPT
- PIM
- WAF
- SIEM(Security Incident Event Management)
- VPN for 30 users
- Others *

(*Any other services/tools related to hosting environment should be taken care by the bidder)

7.11 Facility management services (FMS)

The bidder to offer the facility management services(FMS) comprising a project tech-lead and a team of DBA and developers(5nos.) on site. The FMS team shall be placed at the Corporate office of the Institute, Mumbai. The terms of reference of the project manager and developers would be as under:

The Tech Lead (Senior Software Developer) shall interact with user departments in co-ordination with IT dept. to capture all the requirements and design the application as per the requirements of the Institute.



The bidder to provide a following team composition on calendar man month basis:

Srno	Team	Nos	Responsibilities
1	Tech Lead(Sr.Software Developer)	1	Overall Project Management/Development
2	Full stack Developers cum DBA	4	All database related activities on day to day basis and application Development/maintenance of website and portal including back-end system

i) The FMS team shall attend day to day changes required in all application programs (front-end and back-end), reports, databases queries, triggers, procedures, functions and query-optimization of databases.

ii) The FMS team shall design, develop and maintain all new application systems, website and transactional portal from time to time as per the requirements of the Institute.

iii) There will be no separate charges payable for any modification/addition/updation of existing programs or new programs other than calendar month charges to FMS team. The FMS team shall take care of all the requirements needed by the Institute within the FMS charges payable. If any new module to be developed needs more efforts than the approved resources deployed, the Institute may add or modify the number of resources required. The Institute shall pay additional charges for such extra resources during such projects. After completion of such projects, the Institute may surrender the additional resources back to the bidder. The charges per resource shall be payable as per the details given in the “Commercial Template” –Annexure - I.

iv) The FMS team shall maintain the code changes in a central repository.

v) The bidder should deploy experienced team to take up the software development activities of the Institute.

vi) The bidder shall take care proper training of the FMS team from time to time to keep them relevant with latest technologies adopted.

vii) In case any existing experienced resource leaves or withdrawn by the bidder abruptly, the bidder has to make sure that the incoming resource should be given adequate knowledge transfer of the assignment handled by the outgoing resource. Without which the outgoing resources may not be released by the Institute within short notice.

viii) Updating and maintenance of all project documents (including SRS, Functional documents, Technical Documents, user manuals etc.).

ix) The bidder will define the Software Change Management and version control process and obtain approval for the same from IIBF. For all proposed changes to the application, the bidder will prepare detailed documentation including proposed changes, impact on the system in terms of functional outcomes/additional features added to the system, etc.

x)The FMS services shall be engaged after go live of the project.



7.12 Migration of Legacy data

The bidder should carry out the data migration from the existing systems to new one by mapping appropriately. The bidder needs to migrate complete legacy records available to proposed system. Data shall be migrated from the current application and media to the new application prior to the 'go-live' of the respective module.

The bidder needs to do the following on data migration activities from the existing legacy systems and/or data stored otherwise.

- Design the data migration & acceptance methodology and plan.
- Risk Identification and Mitigation Plan for Data Migration
- Mapping of the data
- Identifying the data gaps
- Perform data cleansing for incorrect/ incomplete data.
- Providing templates for data collection
- Extraction and Loading of the data.
- Listing of errors during data migration
- Corrections of the migrated data during Data Quality Assessment and Review
- Final porting of the data into the proposed system
- Testing and obtain sign off on migrated data.

Data Mapping and cleansing: Since there might be significant difference between existing database table structures and database table structures of new application, there must be mapping done between existing tables and proposed tables and data be made compatible for migration into new tables. A comprehensive data mapping exercise must be undertaken by the bidder before embarking on data migration. A good data map will detail an in-depth cross-referencing of all mutual fields across the source system and the target system. It must include the following (but not limited to):

- Names of applicable "to and from" fields
- Lengths and data types of these fields
- Mapping of relationships between entities
- Check on the constraints, unique fields, and integrity checks.
- Any logic involved in mapping such as string truncations or validations against any business rules.

It is the responsibility of the bidder to develop the tools, extract data from the database, check the data integrity and migrate the data.

Bidder shall run mock data migration tests to validate the conversion programs that have been written.

Bidder shall validate the data before uploading the same to the production environment.

Bidder shall support in conducting the acceptance testing and verifying the completeness and accuracy of the data migrated from the legacy systems to the proposed solution.

The approximate size of entire data of back-end applications is 5TB. (Certificate database - 1.5TB, CMS - 1TB, CLMS database - 1TB, Front End Web Portal - 1 TB. (PostgreSQL).



8.Operational Mechanism of the Website/Portal:

8.1 Informational services:

The details of Institute's profiles, its products, and services to be accessible by page visitors.

8.2 Transactional services:

A prospective candidate visits IIBF site and creates his/her profile. During creation of a user profile, the transactional portal system should capture the mandatory inputs stipulated by the Institute. After creation of the profile, the login id and passwords must be generated and sent to candidates. Subsequently, in case if any candidate wishes to avail the services of the Institute he/she can choose a particular service, fill up necessary details through a form and makes requisite payment using payment gateways from M/s Billdesk or M/s CSC based on the kind of registration. The payment gateway(M/s Billdesk or M/s CSC) receives the payment in online mode and the necessary receipt for the payment must be generated in addition to tax invoices required for GST. The details of receipt of payments to be sent to candidates by an e-mail and by SMS for his/her record. The website should generate the necessary MIS at the end of the day for Institute's reference. The entire process should be full proof and must ensure that the necessary security controls are in place. It shall not give any room to fraudulently access transactions and should not be allowed to tamper the same. Integration with different payment gateways should be ensured.

8.3 Educational Services:

The Institute offers e-learning, virtual classes and mock tests to the registered candidates for various courses. The Institute has separate agreements with third party service providers for these facilities. The website should allow candidates to avail these facilities seamlessly.

8.4 Daily News Letter (Fin@Quest):

The Institute offers a daily e-news letter service to the registered candidates which covers banking and finance related news and information. The bidder should take care of generating the news letter on a daily basis by procuring news from various sources of national and international domains. For this purpose the bidder should engage proper resource persons.

9.Bidding Process:

The bids shall be evaluated on techno-commercial evaluation method. The evaluation criteria for technical and commercial bids are given in clauses 13.a and 13.b respectively. The entire work should be undertaken on a turnkey basis.



10. Schedule of activities of Bidding:

The schedule of activities of bidding process is as under:

Sr. No	Description	* Date
1	Release of Request for Proposal (RFP)	17 th July-2024
2	Last date of submission of written requests for any Clarifications from prospective bidders. Queries may be sent to the e-mail id: itbids@iibf.org.in	23 rd July 2024
3	Pre-bid meeting for clarifications on written Queries. Pre-bid meeting will be held at Corporate, Office, IIBF, Mumbai at 3.30 PM	30 th July 2024
4	Last Date of submission of Proposal up to 3PM. <u>(Bidders must carry out a proper due diligence analysis of systems and arrive an appropriate time and efforts needed for taking up the project before submission of proposals instead of quoting based on mere estimates.)</u>	19 th August 2024
5	Opening of technical bids in the presence of Bidders at 3.30PM, at Corporate Office, IIBF, Mumbai	19 th August 2024
6	Technical presentations from the bidders	26 th August 2024
7	Opening of commercial bids in the presence of bidders who qualify in the technical round	26 th August 2024

* Tentative dates

The above dates are tentative and IIBF reserves the right at its discretion to change the schedule of activities, including the associated dates.

11. Minimum Eligibility Criteria:

Sr.	Minimum Eligibility Criteria	Supporting Document
a.	The bidder should be a firm / Pvt. Ltd / Ltd. Co registered under the Indian Companies Act, 1956 having operations for 10 years in same field.	Registration certificate Firm / Public / Pvt Ltd. / Ltd. Co.
b.	The bidder should have a turnover of Rs.150 crores or above during each year of last three completed financial years.	Self certified copies of the audited balance sheet and profit & loss statement for the last 3 completed financial years.
c.	The bidder should be earning a Net Profit or having +ve Net Worth in each of the last three completed financial years.	Self certified copies of the audited balance sheet and profit & loss statement for the last 3 completed financial years.
d.	The bidder should have executed at least three orders of similar nature / value and preferably in multiple locations of Educational Institutes	<ul style="list-style-type: none"> • PO • Project completion report



e.	The bidder should provide the proof of accreditation to Quality Management Systems like ISO 9001:2008 or 2015/ SEI CMMI Level 3 and above/ Six Sigma practice (Minimum one certificate is Preferable)	Copy of any one certificate is preferable.
f.	The bidder should possess qualified and experienced software engineers to take care of hosting and maintain the website, portal and back-end systems	Self-certified statement indicating Number of Software Engineers with qualifications and year/s of experience.
g.	Bidder should have technical support help-desk for hosting and cloud operations 24x7 .	Escalation Matrix of hosting and data-centre/cloud should be enclosed.
h.	The bidder should not have been blacklisted by any department or undertaking of the Government of India and the Government of Maharashtra or other state governments or any public sector banks	A self declaration letter from the company secretary of the organization to be enclosed

Note: Necessary supporting documents should be arranged / numbered in the same order as mentioned above.

Failure to meet any of these criteria will disqualify the bidder and will be eliminated from the further process.

The Institute reserves the right to verify and/ or to evaluate the claims made under eligibility criteria. The decision of the Institute, in this regard shall be final, conclusive and binding upon the bidder.

‘Project Completion Report’ should include references of customers for whom website development projects of similar complexity / size / cost have been successfully implemented and is/are in operation. Provide the details of hardware, operating systems, application software, size of network, size of database etc., and certificates from the clients regarding the performance of such solutions to be provided.

12.Conflict of Interest:

Any bidder who is in a similar business as that of IIBF in the areas of education, training and certification, will not be considered and no correspondence or queries shall be entertained from such bidder. Institute’s decision in this regard shall be final and binding on the bidder.

13.Evaluation of Bids:

The evaluation of bids would be based on techno-commercial evaluation method.

The technical proposals shall be evaluated as per the clause 13.a given in this RFP.



a) Technical Evaluation:

The total points to be awarded in the technical round will be as under:

Sr.No	Description	Points Earmarked
1	Presentation on adoption of technology/ Understanding of project, Approach & and development and deployment Methodology of application systems.	40
2	Points for data centre (a) Own cloud/data centre within India: up to 25 points (b) Third party cloud data centre within India: up to 20 points	25
3	(i) Past experience maximum points up to (20) (a) For minimum 10 years operations: up to 15 Points (b) Above 10 years operations: up to 20 Points (ii) Support/Reference(15) (a) Minimum 3 projects: up to 10 points (b) More than 3 projects :up to 15 points	35
4	Total	100

Mechanism of awarding Technical Scores to bids:

The bidder/s who score/s highest points will be awarded with full Technical weightage of 70 marks, and accordingly the second highest; third highest scores will be calculated in proportion to the highest points obtained by a bidder in the technical round.

For example:

Suppose in response to the RFP, 3 bids are received from Bidder A, Bidder B & Bidder C then their scores will be calculated as under:

Assume, the bidders obtain the points as given below, based on the techno functional features:

Bidder A gets - 65 points,

Bidder B gets - 70 points

and Bidder C gets – 90 points

Out of technical scores the technical weightages calculated for each bidder, awarding 70% weightage to the bidder who scored highest points in the technical round.

The technical weightages are calculated as under:



(technical points scored by a bidder/highest points scored)* 70= arrived technical weightage of a bidder

(Points are arrived proportionately with the highest points divided by points obtained by a bidder and multiplied by the technical weightage i.e., 70)

The technical score of Bidder C will be = points awarded to C' (90)
----- * 70%=70
points awarded to C' (90)

The technical score of bidder A will be = Bidder A's score (70)
----- * 70% =54
Points awarded to C' (90)

The technical score of bidder B will be = Bidder B's score (65)
----- * 70% =50.55
Points awarded to C' (90)



Note:

- **Bidders who score 60 or above points/marks (will be rounded to nearest integer) in technical round will only be considered as qualified in the round**
- **Bidders who obtain less than 60 points/marks in the technical round shall not be considered for the next process of bidding**
- **No further discussions/interactions will be entertained with a bidder/s who could not qualify in the technical round**
- **The bidder/s who could not qualify in the technical round shall be intimated accordingly and their EMD and their commercial bids(unopened) will be returned to them.**

b) Commercial Evaluation:

The commercial bids will be opened in the presence of qualified bidders as per the schedule date given in clause No. 10 of this RFP.

A commercial bid which carries the lowest cost will be given the full weightage of 30 points and other bids are rated in inversely proportional to their prices.

As commercial bids are given 30% of weightage, the commercial score of each bidder is calculated as under:(arriving points in inversely proportional with the lowest price divided by the price offered by a bidder and multiplied by the commercial weightage ie., 30)

For example: Suppose the prices quoted by the qualified bidders are as under: Price quoted by bidder 'A' is = Rs.120/-

Price quoted by bidder 'B' is = Rs.100/-

Price quoted by bidder 'C' is = Rs.110/-

In this case, bidder 'B' will get full '30' points as it is lowest among others.

The commercial score of bidder 'A' will be = Bidder B's price(100)
----- * 30% =25
Bidder 'A' price (120)

The commercial score of bidder 'C' will be = Bidder B's price(110)
----- * 30% =27.5
Bidder 'A' price(120)

The weightages of technical and commercials will be added together to arrive at the Total weightage out of hundred marks for each bidder. The bidder who secures the highest combined



weightage(technical and weightage) will be ranked as H1, second highest as H2 and third highest as H3.

Example:

From the above examples, the combined Technical and Financial scores of the bidders would be ranked as under:

$$\text{Bidder A} = 51 + 25 = 76 = \text{H3}$$

$$\text{Bidder B} = 54 + 30 = 84 = \text{H2}$$

$$\text{Bidder C} = 70 + 27 = 97 = \text{H1}$$

The proposal from bidder C of Rs.110.00 will be considered as most responsive bid and it may be called for further price negotiations, if needed.

IIBF reserves the right to negotiate with the vendor who obtains 'H1' score before awarding the contract.

IIBF's decision in respect of evaluation methodology and short-listing a bidder shall be final and no claims whatsoever in this matter will be entertained.



14. Proposal Format:

The technical proposals should be submitted in a sealed cover, marked as **“Request For Proposal (RFP) for design, development of new website, portal and back-end systems & migration of existing data, content of website and hosting & maintaining it in a cloud environment on a turnkey basis on a turnkey basis on a turnkey basis -Technical Information only”**

- A bidder should submit the proposals with clarity & proper pagination so that the papers are not lost.
- The proposals, that are not sealed or RFPs sent by e-mails will be summarily rejected.
- The proposals that are not submitted in the prescribed format or incomplete in details are liable for rejection.
- The proposals containing unauthenticated erasing or alterations will not be considered.

14.1 Contents of the Technical Proposal:

- A company shall submit a letter through its duly authorized official bearing his/her name and designation. The letter shall include, a statement of proprietary information, if any.
- Table of Contents (List of documents enclosed)
- Authorization letters from OEMs (Original Equipment Manufacturers/Software Bidder) of the quoted products, in case of 3rd party products.
- Detailed technical specifications/brochures of the solutions proposed.
- Detailed architecture of the proposed solution with all the features/functions of the systems. This should also include details of the hardware system that will be used to host the web site and contents even though it is a hosted model.
- Future road map on scalability, version upgrades/releases etc. This pertains to any upgrades of OS, Application Server, Database server, Web server, Programming languages, or tools such as IDEs etc.
- Proof of implementation of similar project.
- Resume of the proposed Project Management team with Name, Designation, qualification & experience details.
- Specify the Hardware, Operating System, Software licenses, bandwidth required for successful implementation.
- Technical proposal should **not** indicate any cost aspect directly or indirectly.



14.2 Inputs of commercials:

The bidders should submit commercial bids in a separate envelope marked as **“Request For Proposal (RFP) for design, development of new website, portal and back-end systems & migration of existing data, content of website and hosting & maintaining it in a cloud environment on a turnkey basis – Commercial Information only”**

The envelope should consist of the item wise cost as per commercial template mentioned in **Annexure – I** and should be super scribed as “Prices Item Wise”.

Note:

The bidders must provide all the relevant information of price and not contradict the technical proposal in any manner. **All prices must be quoted in Indian Rupees only.**

The prices quoted in the proposal shall hold good for a period of six months or till the issue of the order letter. These prices shall not change till the end of the contract period after acceptance of the order letter by the bidder. The price formats are mentioned in the commercial template given in ‘Annexure-I’.

15. System Acceptance Testing:

Unsatisfactory performance of the entire project may result in rejection of the part or whole of the solution during acceptance testing. Acceptance test will end when the performance of the entire project meets the functional & technical specifications at primary site.

At the end of the successful completion of acceptance test of entire project, a sign-off shall be given for full-fledged commencement of the same. Bidder has to test entire project with the volumes mentioned in Clause 16 of this RFP



16. Infrastructure Sizing/ Technology stack:

The Bidder must deploy optimal infrastructure such as Hardware, Operating System, Database, Middleware etc. As the existing software has been developed in open-source technology stack, the Institute expects the bidder develop the proposed solutions in the open-source technology stack using relevant enterprise editions/Server editions. Keeping in view of the current requirements. The bidder must extrapolate the size of the infrastructure during the contract period (i.e. 5 years plus 2 if extended subject to the discretion of the Institute).

During contract period, at any point in time, the load on the hardware of the new website/transactional portal/back-end system should not exceed 75% of Memory, CPU, Hard Disk storage space utilization levels. In case, if load increases, an appropriate hardware sizing must be determined and deployed immediately. Such requirements may arise at the time of registration of exams; downloading of admit cards, uploading of answer responses, processing of results, declaration of results, generation of digitally-signed certificates and sending them to individual candidates via emails. The Institute will not pay any extra charges for such increment in the hardware-sizing of the CPU, Memory, Storage space and Bandwidth. The bidder has to apportion such upscaling cost of infrastructure in the commercial proposal to be submitted. The uptime of the website /transactional portal/back-end system must be maintained not less than 99.5%.

Irrespective of the load on the website, the response time at client side must be less than 3 seconds.

The bidder should submit the performance logs during peak volumes of registration, generation of admit cards and result declaration. These logs should indicate the response time of the system/web site during such peak volumes.

During the contract period, at any stage, if it is found that the solution deployed by the service provider does not match with the requisite performance as per the sizing parameters (i.e. up time above 99.5% and response time < 3 seconds) the bidder shall have to upscale the hardware, software without any additional cost to the Institute. Institute shall have a right to depute a system/web security auditor to audit the setup of Institute's website and hosting environment. The bidder has to remediate all vulnerabilities/threats observed by the auditor at no additional cost to the Institute.

(vi) For current resources utilized in the existing cloud for website, transaction portal and back-end system are mention under Annexures –VI(Part – A and Part-B)

The bidder shall scale the cloud resources to 15% on year-on-year basis. The bidder has to make a provision for such resources as part of hosting. There will be no separate charges for such increase. Over and above 15% increase in cloud resources, IIBF shall pay as per unit rate of such resources agreed in the contract.

Note: However, the bidder has to create a single hosting environment for website, portal and back-end systems as per the volume of infra resources mentioned in the table. The bidder may optimize the resources while creating single hosting environment for website, portal and back-end systems.



Note:

- **The current Infrastructure details of Website and Transactional Portal (DC/DR) given under Annexure-VI(Part – A)**
- **The current Infrastructure details of Back-End system (DC/DR) given under Annexure-VI(Part – B)**

16.1 Current transactional volumes of the Institute over the website:

- Total no. of Institutional Subscriptions: 834
- Total no of ordinary member records:10,80,531
- Total no. of non-member records:17,73,951
- Total no. of inactive members/non-members: 5,29,425 (Members), 10941 (Non-Members)
- Total no. of registrations for all exams per year: 7,50,000
- Total no.of certificates to be issued per year: 400000
- New ordinary members expected to be added every year: 40,000(Approx.)
- Total registrations of e-learning per year: 50000
- Total registrations for training per year: 10000
- Registration for other services of the Institute: (duplicate certificates, duplicate member id cards etc.,) : 30000
- Annual Projected growth of above statistics in 15 % (approximately)

17.Training:

17.1 Bidder shall organize a user training as follows:

A week's onsite training should be provided to the designated staff of the Institute covering the operational aspect of entire project .

Bidder shall provide a separate documentation to each participant (hardcopy and softcopy). Document should offer illustrations for each module / activity with probable solutions to the errors that may crop up during operations and steps of resolving the same.

17.2User training should also cover the following:

- Features / Functionality available in the website
- Parameterization
- Background process
- Admin module and Reports

18. Terms and Conditions:

- The bidders must sign / initial on all the pages of the RFP and give an undertaking that they have understood all the terms and conditions as specified in the RFP and shall abide them. This has to be done while submitting the bid/s.



- In case if any bidder seeks to clarify any terms of RFP or have doubts, such clarifications should be raised at the time of pre-bid meeting only. After pre-bid meeting, no deviation from the RFP terms shall be entertained and if any bidder is found to have deviated from the RFP terms, their bids will be rejected and they will be disqualified from the RFP process.
- The bidder must provide a Project Manager who shall act as a single point of contact for all activities regarding this project. The Project Manager should make on-site decisions regarding scope of the work and any other changes required therein.
- The bidder shall provide all reference manuals, booklets, e-books and other materials required to maintain the systems effectively. (print copy 3 number and a softcopy)
- The technical proposal will be evaluated based on the technical inputs as well as complying with terms and conditions of the RFP.
- Functional & technical information of the solution being offered must be provided in the exact format as given in RFP.
- Selected bidder shall have to sign a service agreement with the Institute, covering the scope of the work mentioned in this RFP. Draft copy of the agreement has been given in Annexure-IV of this RFP.
- The bidder shall bear all costs associated with preparation and submission of the proposal, attending pre-bid meeting or arranging product walk through and technical presentations etc.
- The Institute may call for any clarification from all or any of the bidders in connection with their offers.
- While offering their bids, the bidders should anticipate the version / product changes during the entire project (Total Cost of Ownership- TCO) period (for the entire contract period)
- The service provider has to customize all gaps observed in the following stages of website maintenance contract.
 - UAT and
 - Implementation.
- The bidder shall be responsible to provide complete documentation of the solution (three hard copies and a soft copy) which includes but not limited to the following:
 - User and technical Manuals; including error messages, their meanings and steps to rectify the errors.
 - Design and Analysis Manuals with relevant data flow diagrams.
 - Detailed Architectural Design, including fail over methodology/ strategy at both Primary & DR Site.



- Maintenance Documents.
- Post implementation of the website, portal, back-end systems, the bidder has to provide tech support services for 365 days.
- Bidder shall submit progress report of the project as per clause No.20 (Project Schedule) of this RFP. Bidder will be responsible to implement appropriate project control measures and report the same to Institute in timely manner.
- Bidder shall be responsible for knowledge transfer to the incoming bidder as and when required by IIBF
- At the time of exist of the contract, the bidder must provide entire site dump of the Institute's website, portal, back-end application, including the customized applications, databases and entire data. They should help the incoming bidder to restore the site dump seamlessly at the new site. Release of the performance guarantee and any final payments payable to the outgoing service provider shall be done only after smooth porting, transition of the new website all the applications. This shall include amongst others, system walkthrough and hands on support for minimum of 12 weeks.
- Any effort by a bidder to influence IIBF on any matter relating to the proposal, its evaluation, comparison, selection may result in rejection of the bidder's proposal.
- Any changes in the business logic affecting the **existing applications** must be covered within maintenance charges quoted and IIBF will not pay any separate charges for such work.
- In the event of bidder not owning a cloud/data centre, the bidder has to enter into an agreement with a data center service provider holding a valid audit certificate in respect of its cloud/data centre for the period of 5-years from the date of hosting. The hosting contract could be extended for two more years on yearly basis at a time based on the performance of the bidder on the same terms and conditions as the original agreement. A copy of the valid agreement from a cloud/data centre service provider, has to be submitted to the Institute after receipt of order letter. In case the bidder fails to submit the copy of the said agreement, the order issued by the Institute shall stand cancelled and the EMD submitted will be forfeited.
- Any initial advances(as mentioned in the payment terms under clause no.26) shall be released after submission of PBG(performance bank guarantee) and signing of the agreement.

19.Earnest Money Deposit (EMD):

A bidder who is interested to respond to the RFP, should deposit an earnest money of Rs. 10,00,000/- (Rupees ten Lakh only) in the form of a Bank Guarantee from any commercial bank, which is valid for six months favoring to IIBF and payable at Mumbai. The bidder may use any format of bank guarantee from any commercial bank.

Bank Guarantee should be accompanied by the technical bid. The EMD will not carry any interest.

19.1Refund of EMD:



EMD is refundable to unsuccessful bidders after completion of RFP process i.e. after declaration of successful bidder of the RFP process. EMD of the successful bidder shall be refunded after execution of SLA(service level agreement) and / or execution of Performance Bank Guarantee(PBG) which would be 10% of the total commercial bid value of the successful bidder.

19.2 Forfeiture of EMD:

The EMD (earnest money) submitted by the bidder towards RFP will be forfeited if the bidder-

- Withdraws the bid after acceptance of the bid by IIBF; or
- Withdraws the bid before the expiry of the valid period of the RFP; or
- Violates any of the provisions of the terms and condition of the RFP and SLA
- In case of a successful bidder fails to furnish the SLA and / or PGB in accordance with terms and conditions of the RFP document.
- Or in case the successful bidder picks up the order and does not proceed with the project. This period will be decided by the Institute.

20. Performance Bank Guarantee:

The successful bidder shall furnish the performance security equivalent to 10% of the total commercials mentioned in the commercial template that accrues for 5 years, in the form of Performance Bank Guarantee issued by any Commercial Bank in India. The bank guarantee should be valid for a period of 5-1/2 years. If the contract is extended, bidder has to furnish a fresh bank guarantee for the extended period for total cost of ownership (towards one time setup, FMS and AMC charges).

21. Rejection of Bids:

The bids are liable to be rejected if:-

- Received after the expiry of the due date and time.
- Not received in a sealed condition.
- It is a conditional bid.
- Not in conformity with the terms and conditions mentioned in the RFP.
- It is incomplete including non-furnishing of the requisite documents.

IIBF reserves the right to reject the bid/s without assigning any reasons. The decision of IIBF will be final, and no communication whatsoever will be entertained in this regard.

22. Project Schedule:

The successful bidder should complete the project within 9 months from the date of acceptance of the order letter as time is the essence of the project.

In case the existing service provider abruptly gives notice for termination the existing contract, the incoming bidder should take over the existing setup including present website, transactional



portal and back-end systems and maintain the same till roll over of the new system. The charges for such services shall be as applicable to AMC Charges.

23.Deliverables Acceptance Criteria

The acceptance criteria for each phase will be based on the completion of milestones and deliverables accepted by the IIBF.

24.Penalty for interruption in the services:

In case if any disruption occurs in hosting and maintenance services for a continuous period of 8 hours, IIBF at its discretion may impose a penalty of Rs.20000/- per day till resumption of the services.

The payment of the said penalty arises immediately on the failure of service provider to restore the proper services in question.

Notwithstanding any dispute/litigation between the service provider and the third party in connection with the arrangement/understanding for whatsoever reasons leading to disruption/deficiency/stoppage of hosting and maintenance services to IIBF for a continuous period of 48 hours; the service provider agrees without any demur to pay a penalty of Rs.25 Lakh (Rupees twenty five Lakh only) to IIBF. The payment of the said penalty arises immediately on the failure of service provider to restore the proper services in question.

Such a default on the part of service provider for whatsoever reasons in restoring the proper services to IIBF as aforementioned also tantamount to breach of these presents. Service provider agrees and understands that IIBF/Client has nothing to do with the terms/understanding/arrangement between the Service Provider & third party and IIBF is neither bound by any such arrangement nor any duty/obligation whatsoever flows from the said agreement/understanding



If the response time of the website is more than 3 seconds, for a continuous period of 2 hours at any point in time, a penalty of Rs.20000 may be levied for such block of nonperformance till restoration of proper services.

In case failure of registration of membership/examination or for any other services for a continuous period of 2 hours at any point in time, a penalty of Rs.20000 may be levied for such block of failure of registration till restoration of proper services.

25.Termination of the contract:

Both the parties can terminate the contract by giving three months notice in writing:

- In the event of bidder choosing to terminate the contract the Institute reserves the right to invoke performance bank guarantee and/or take such other steps as deemed necessary.
- IIBF may at its discretion terminate the contract if it is found that the services rendered by the bidder are not satisfactory and may invoke performance guarantee.

26. Payment Schedule:

i) One Time Setup Charges:

The payment in respect of one-time setup charges will be made as given below.

Milestones for payment	% of one time development charges
1.Advance with award of contract	5%*
2.SRS/Functional Specification Document, Detailed Specification Document and prototype delivery	10%*
3.Sing-off of User Acceptance Testing after commencement of hosting entire project	75%
4.After one year of Performance warranty	10%

***Note: The advance against item No.1 will be paid against equivalent amount of Bank Guarantee or after receipt of PBG. The payment towards item No.2 shall be made only after submission of PBG as mentioned in the RFP.**

ii) On Account of AMC:

Payment on account of AMC will be made at the end of each quarter in 4 equal installments of yearly AMC charges.

iii) Facility Management Charges(FMS) per Calendar Man month basis (per resource):



The facility management services shall be engaged after completion of entire projects and post go live.

The FMS charges shall be payable at the end of each quarter after reckoning the attendance of the team members on monthly basis. The attendance shall be approved by the Institute and based which the bidder shall raise the invoice for a quarter and submit to the Institute for payment. On-site support resources (FMS) should be experienced enough to capture the requirements for development, maintenance, customization and go-alive. Also, should have knowledge about the functionality, workflow and other technicality of the project. If Institute is not satisfied with the services of the onsite resource, then vendor has to replace them with more experienced resource immediately without any cost to Institute. Institute may ask to arrange technical interview of onsite resources.

27.Site Dump:

The bidder must supply the back up(site dump) of entire website/portal/back-end system along with existing source code at the end of each quarter. The site dump has to be restorable and work seamlessly after such restoration. Further bidder should note that the hosting and backup have to be taken care by the bidder, and no hardware infrastructure shall be provided by the Institute for such activity.

28.Non-Disclosure:

The contents of the proposal and all the project outputs should not be disclosed to any party unless Bidder and IIBF mutually agree in writing to the same. Bidder will not use the contents of this proposal to bid for any other contract. The IPR of the content will vest with IIBF and the bidder agrees to deliver the content to IIBF at the end of the contract period. The bidder should sign a non-disclosure agreement separately before commencement of the project along with service agreement.

29.Reservation of Rights:

The Institute reserves the right to change / add / modify / relax any / all conditions stipulated or increase / decrease items requested as also to accept / reject any / all offers without assigning any reasons whatsoever.

The Institute also reserves the right to cancel this RFP or go for a fresh one with or without any amendments without any liability or any obligations.

The decision of the Institute in selecting the bidder would be final and conclusive. The Institute shall not entertain any correspondence in this regard.

Bidders are requested to offer the best price, item wise (exclusive of taxes), along with other terms and conditions on or before **19th August -2024 by 3.00 pm** in sealed envelopes duly super scribed **“Request For Proposal (RFP) for design, development of new website, portal and back-end systems & migration of existing data, content of website and hosting & maintaining it in a cloud environment on a turnkey basis -Technical Information only”, “Request For Proposal (RFP) for design, development of new website, portal and back-end systems & migration of existing data, content of website and hosting &**



maintaining it in a cloud environment on a turnkey basis –Commercial Information only”.

The technical and commercial envelopes should be enclosed in a bigger single envelope superscribing **“Proposal (RFP) for design, development of new website, portal and back-end systems & migration of existing data, content of website and hosting & maintaining it in a cloud environment on a turnkey basis”** and it should be forwarded to the below address:

**To
The Chief Executive Officer
Corporate Office
Indian Institute of Banking & Finance
2nd Floor, Tower I,
Commercial II, Kohinoor City,
Kiroli Road, Kurla - West
Mumbai – 400 070.**



Annexure – I

Commercial Template

Sr. No	Particulars	1 st Year	2 nd Year	3 rd Year	4 th Year	5 th Year	*6 th Year	*7 th Year
1	One time charges for design, development of new website, portal and back-end systems & migration of existing data, content of website		NA	NA	NA	NA	NA	NA
2	<p>Total Annual Maintenance Charges on turnkey basis(AMC):</p> <p>(i) Infrastructure setup Charges and Hosting, Managing and Maintaining the website, portal and back-end systems in a cloud environment on turnkey basis for 5 years:(including DR per year)</p> <p>(ii) Total Charges for Network connectivity (as mentioned under clause No 7.9)</p> <p>(iii) Total Charges for Managed Services (includes all the items mentioned under clause No 7.10):</p> <p><u>Note: for items 2(i),2(ii) and 2(iii) the vender has to provide unit wise price for each component/service for entire period of contract. Hosting charges shall be applicable after go live of the entire project.</u></p>							
3	<p>Facility Management Charges for Onsite dedicated support to begin with (Per Resource charges per calendar month):</p> <ul style="list-style-type: none"> Project Tech Lead (Sr.Software Developer): (1Nos.) Full stack developer cum DBA- (per resource cost *4 nos.) <p><u>Note: These resources will be engaged after deployment and go live of the project.</u></p>							

Taxes shall be paid extra as applicable.

Note*: The Total Annual maintenance charges and Facility Management Charges for 6th and 7th year may be payable in case if the contract gets extended. The right of extension of the contract solely lies with the Institute and the bidder shall not claim the extension automatically.



ANNEXURE - II

PROJECT DETAILS

Project Contacts (primary contact details):

IIBF:

Mr. Malik Rizwan Khan/ Mr.Dattatreya
Dy.Director-(IT)
“Kohinoor City, Commercial II, Tower I,
Second Floor, Kirol Road,
Kurla -West Mumbai – 400 070.
E-mail id:dd.it1@iibf.org.in and assistantdirectorit2@iibf.org.in

(Bidder Name) – Project Co-ordinator details

Response Times

(BIDDER NAME) Support target response times are determined for cases based on the assigned severity. All response times are measured from the time the problem report was received by (BIDDER NAME).

Severity	Target Response Time for Standard Support
Production Down	2 business hours (Mon-Sat) in one time zone
Critical	4 to -6 business hours (Mon-Sat) in one time zone
Minor	1 business day (Mon-Sat) in one time zone
Major	2 business days (Mon-Sat) in one time zone

In case of a production down scenario, (BIDDER NAME) has to resolve the issue on the same day. In normal cases the issues should be resolved on in a single day. However, in worse case scenarios the resolution time could be acceptable up to 2-3 days.

Working Day: a working day shall be any day other than a Sunday or official bank holiday in India. However, if the exams are conducted by the client on those days, it will be deemed as a working day.



ANNEXURE – III

DECLARATION FORM

(TO BE SUBMITTED ON THE COMPANY LETTER HEAD)

I/We hereby solemnly declare and certify that I/We have read and understood all the terms and conditions of the Request for proposal (RFP) for design, development of new website, portal and back-end systems & migration of existing data, content of website and hosting & maintaining it in a cloud environment.

I/We agree to provide the support and services mentioned in the RFP. It is also certified that the Firm / (BIDDER) are never been black listed by any agency. All the terms and conditions mentioned in this RFP have been understood and acceptable to us. We are submitting all the relevant documents duly filled in, signed, and stamped on each page.

Name in Block Letters:

Signature:

Designation:

Company Seal

Place: Date



Annexure IV
Format of Service Agreement (Specimen)

		<p>Agreement entered into this _____day of _____</p> <p>_____2024 BETWEEN a company</p> <p>registered under the Indian Companies</p> <p>Act of 1956 having its office at _____</p> <p>_____</p> <p>India hereinafter referred to as the</p> <p>“Service provider” which expression shall unless it be repugnant to the</p> <p>context or meaning thereof mean and include their successors in interest</p> <p>and permitted assigns) of ONE PART</p> <p>AND</p> <p>Indian Institute of Banking & Finance, (formerly The Indian Institute of</p> <p>Bankers)a company registered and incorporated under the Indian</p> <p>Companies Act, 1913, having its corporate office at Kohinoor City,</p> <p>Commercial II, Tower I, Second Floor, Kirol Road, Kurla–(West),</p> <p>Mumbai – 400 070 hereinafter referred to as the “Client” which</p> <p>expression shall unless it be repugnant to the context or meaning thereof</p> <p>mean and include their successors in interest and permitted assigns) of</p> <p>the OTHER PART.</p> <p>Collectively both referred to as “Parties “and individually as “Party”.</p>
Recitals	(A)	Whereas Bidder is a Service Provider and creates of web-based products.



	(B)	<p>(i) And whereas Client is a professional body of banks, financial institutions and their employees in India.</p> <p>(ii) The client had issued a Request for Proposal (RFP) to select a Service Provider for hosting and maintaining its website/portal and back-end system on the lines of its existing website (www.iibf.org.in). The Service provider, pursuant to the terms of the RFP has agreed to take over the current website, host and maintain the same. The RFP forms part and parcel of these presents and shall be referred for giving effect to any of the terms/understanding or as the case may be.</p>
Scope of contract	(C)	The Service Provider shall host, maintain and manage administrative support in respect of the website, portal and back-end applications as per the broad scope of the work mentioned in this RFP during the term of this agreement on the terms and conditions set out below, for the price to be paid by the Client in respect thereof.
	D.	The parties hereto have decided to enter into an agreement, being these presents, setting out the terms and conditions on which Service Provider would provide their services as defined in this RFP and more particularly described in the respective Annexures accompanying hereto forming part and parcel of this Agreement.
	E.	This Agreement will come into effect from----- 2024 to 2029 and extendable for two more years on half yearly basis at a time on same terms and conditions as the original agreement.
Definitions	1.	In this Agreement, the following words and expressions shall have the following meanings.
	1.1	Acceptance: acceptance by the Client that the Deliverables or the Master (as the case may be) conforms/s to the FSD(Functional Specification Document) and DSD(Design Specification Document) and /or the FDSD(Functional and Design Specification Document) as applicable as hereinafter defined.



	1.2	Bug Fix: means any trouble shooting, patch, error correction to the website that corrects an Error and/or improves performance of the website but which does not add any new functionality.
	1.3	Client supplied content (CSC): content supplied by the Client for inclusion in the Products including but not limited to textual and other material, content manuals, unedited media, video clips, video elements, tools for product development, keyboards etc.
	1.4	The Service Provider agrees to deposit the site dump periodically with the client. The same should be restorable seamlessly.

	1.5	Design specification document (DSD): It is a document duly described in the SOW (Statement of Work) DSD which determines in respect of the deliverables the instructional design, visual design, navigational elements, communication design inclusive of icon design, element design and outline of text, illustrations, photographs, video, animation, charts, graphs, formulas and voice over of the entire website content more specifically mentioned in these presents.
Maintenance Period	1.6	This maintenance period would be for 5 years commencing from - - - - 2024 and would be valid up to ----- 2029 and extendable for two more year on yearly basis at a time on the same terms and conditions as the original agreement.
	1.7	Functional specification document (FSD): It a document duly described in the SOW. FSD which sets forth the program content, program sequence, and program structure of the deliverables in detail.
	1.8	Functional and Design specification document (FDSD): a document which is a combination of the Functional and Design specification document and is applicable depending upon the nature of the project. The FDSD would be described in the SOW.



	1.9	Project Co-ordinator: a co-ordinator appointed by the Client to co-ordinate work on the Products on behalf of the Client.
	1.10	Permitted Users: mean Client's employees, agents, customers and representatives.
	1.11	Price: shall have the meaning as set forth in this agreement or the SOW
	1.12	Upgrade: means any update, upgrade, patch, new version or other modification to the website that adds new functionalities.
	1.13	Working Day: a working day shall be any day other than a Sunday or official bank holiday in India. However, if the exams are conducted by the client on those days, it will be deemed as a working day.
	1.14	Statement of Work (SOW) - All assignments performed by Service Provider under this Agreement shall be in accordance with individual Statement of Works.

		NOW THIS AGREEMENT WITNESSETH AS FOLLOWS
Payment	2.	In consideration of the Price to be paid at the said times and in the manner set forth in the RFP (a) the Service Provider shall design, development of new website, portal and back-end systems and migration of existing data, content of website and hosting & maintaining it in a cloud environment as described in the RFP and SRS that may be finalized at the time during the requirements gathering;
	2.1	Signature by the Client or its authorized representative on the said documents as mentioned in clause 4.2 of the RFP from time to time above imply consensus and Client acceptance of content of the Deliverables. All Annexure's attached hereto shall be an integral part of this Agreement and shall be valid and binding upon the parties.



	2.2	All payments as referred to hereinabove shall be payable within a period of 45 days from the date of receipt by the client and all delayed payments without any reason beyond such period may attract interest charge @ SBI base rate per month or the maximum rate permitted by applicable law, whichever is lower, unless the same is withheld for the reasons brought to the notice of the Service Provider.
AMC/FMS	3	<p>The AMC includes Hosting, Managing and Maintaining the website, portal and back-end systems in a cloud environment, Managed services, and network connectivity charges.</p> <p>The FMS Charges shall be payable based on the no of resources deployed from time to time by the bidder.</p> <p>The maintenance contract (AMC) and FMS charges are valid for 5 years from ----- 2025 to----- 2029 and extendable for two more years, one year at time on same terms and conditions as the original agreement.</p> <p>The payments will be made in 4 equal installments in a year after satisfactory performance of the previous quarter.</p>
Mode of payment	4	All payments due to the Service Provider from the Client are to be made online to Service Provider's bank account.
Commencement of work	5	<p>The Service Provider should commence the services of Hosting, Managing and Maintaining the website, portal and back-end systems, offer managed services, and network connectivity after go live.</p> <p>FMS services should be offered after go live.</p>
Time of essence	6	The Service Provider acknowledges that time is the essence under this agreement.
Confidential Information	7.1	Each party hereto agrees to keep in confidence all information relating to or acquired from the other in connection with the performance of this agreement, including, but not limited to, the deliverables, the SOWs, the DSD, FSD and/or the FDSD and also the client supplied content.



	7.2	Each party agrees that it will not publish, communicate, divulge, disclose or use any information described in Section 7.1 above except for the purpose of furthering the performance of their duties connected thereto. In the event of a breach or threatened breach of the provisions of this Section 7.2, the non- breaching party shall be entitled to an injunction restraining the breaching party from disclosing or using, in whole or in part, such confidential information. Nothing herein shall be construed as prohibiting either party from pursuing any other remedies available to it for such breach or threatened breach, including the recovery of damages.
	7.3	The parties hereto agree that they will reveal such confidential information only to those of their officers and employees who, in their reasonable judgment, have a need to know such confidential information for the intended purposes.
	7.4	The parties hereto also agree that the confidential information described in Section 7.2 shall not include the following:
	7.4.1	Information that is or becomes generally known to the public other than as a result of a breach of this clause;
	7.4.2	Information disclosed to either party by an independent third party without any obligation of confidentiality;
	7.4.3	Information developed independently by either party, which is unrelated to the deliverables or information, which is trivial or obvious.
	7.4.4	These obligations of confidence shall survive for a period of one year after termination of this agreement, unless otherwise mutually agreed by the parties.



Return of Materials	8	Any materials or documents, which have been furnished by one party to the other, will be promptly returned, accompanied by all copies of such documentation, after the business possibility has been rejected or concluded. In the event it is not feasible or reasonable to return such material the receiving party should destroy the same and certify such destruction in writing to the disclosing party.
Warranty	9	The Service Provider represents and warrants that:
	.1	<p>The website as defined herein above will perform in accordance with the standards and requirements set forth in this agreement and the SOW, the DSD and FSD and /or the FDSD as applicable described in Annexure. The website will be free from textual defects, technical defects, operational defects, or bugs under normal use.</p> <p>The Service Provider will provide client support and troubleshooting for this period from the date of sign-off of the project. Any bugs in the website shall be fixed at no extra cost. In case of any change in the Scope of Work or re- work, which results in change in the agreed delivery milestones or price, the client shall agree to the extended delivery dates?</p>



Penalty	10	<p>a)In case of failure of all critical applications or any other services for a continuous period of 2 hours at any point in time a penalty of Rs. 20000/- shall be levied for such block of time period till restoration of such services.</p> <p>b)In the event of disruption in the services for a continuous period of 8 hours, IIBF at its discretion can impose a penalty in the sum of Rs.100000/- per day till resumption of the services.</p> <p>The payment of the said penalty arises immediately on the failure of service provider to restore the proper services in question.</p> <p>c)Notwithstanding any dispute/litigation between the Service provider and the third party in connection with the arrangement/understanding for whatsoever reasons leading to disruption/deficiency/stoppage of services to IIBF for a continuous period of 48 hours; the Service provider agrees without any demur to pay a penalty of Rs. 25 lakhs (Rupees twenty five lakhs only) to IIBF. The payment of the said penalty arises immediately on the failure of Service Provider to restore the proper services in question.</p> <p>Such a default on the part of Service provider for whatsoever reasons in restoring the proper services to IIBF as aforementioned also tantamount to breach of these presents. Service provider agrees and understands that IIBF/Client has nothing to do with the terms/ understanding/arrangement</p>
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		<p>between the Service Provider & third party and IIBF is neither bound by any such arrangement nor any duty/obligation whatsoever flows from the said agreement/understanding.</p> <p>c) If the response time of the website is more than 3 seconds, for the continuous period of 2 hours at any point in time, a penalty of Rs.20000 may be levied for such block of nonperformance till restoration of proper services.</p> <p>d) In case the bidder could not restore the services after 48 hours, the Institute may call for invoking the performance bank guarantee submitted.</p>
Intellectual Property Rights	11	<p>On payment of all sums payable to the Service Provider under this agreement all intellectual property rights, authorship rights and all other rights of whatsoever in nature shall vest in and shall remain vested in the Client. All and any CD-ROMS and/or pen drives and/or magnetic tapes and/or any other media (together with all and any copies thereof) for inclusion in the deliverables will be returned to the Client by the Service Provider immediately following the production by the Service Provider after go live of the project.</p>
Indemnity	12	<p>The hosting and maintenance of the website will not result in any breach or violations or infringement of any trademark, trade secret or copyright of any third party. It is clearly understood that the Service Provider shall take reasonable care to ensure that there is no violation or infringement of any trade secret, trademark, and copyright of any third party. Service Provider will indemnify the client during the term of this agreement against any such breach, violation or infringement of trade secret, trademark or copyright of any third party.</p>
Client's responsibility	13	<p>Client shall be responsible for:</p> <p>(a). Providing a detailed brief, including information to be hosted.</p> <p>(b). review of website content , its structure, , and of the program at development milestones</p> <p>(c). Providing outlines for branding and artwork.</p>



Project Co-ordinator	14	The client is entitled to appoint its own project co-ordinator hereinafter referred to as co-ordinator to oversee the progress of the work and inspect the workmanship and such other duties as may be entrusted to him by the client.
	14.1	The client is responsible for defining the role and responsibilities of the Project Co-ordinator.
	14.1.1	The client shall be wholly responsible for such Project Co-ordinator's fees, travel expenses, and lodging.
	14.2	The Project Co-ordinator may issue written instructions, details, directions and explanations to the Service Provider relating to:
	14.2.1	Variation and / or modification of the scope of the work
	14.2.2	Amending and correcting defects
	14.2.3	Any other matters involving the products
Promotional material	15	Subject to obtaining prior approval from the client, the Service Provider will retain all rights to provide references to and demonstrate the product to potential clients as promotional material and undertakes to acknowledge the client as being the commissioning organization for development of the product. The Service Provider ensures the client protection of its confidential information whilst providing such demonstrations. The client further agrees to acknowledge and credit the Service Provider “as Service Provider of the product”, in all public communications, if the product developed wins an international award, recognition or competition.
Modification	16	This agreement embodies the entire understanding of the parties as to its subject matter and shall not be amended except in writing executed by both the parties.



Term, Termination and effects of Termination	17	This agreement shall commence on the effective date of this agreement and unless and until terminated earlier in accordance with the terms of this agreement shall continue in force for 5 years from the date of hosting and may be extended for 2 more years on yearly basis at a time on same terms and conditions of the original agreement.
Termination of contract	17.1	<p>Both the parties can terminate the contract by giving three months notice in writing</p> <p>In the event of bidder choosing to terminate the contract without any reasonable cause and/ or failure on his part to perform the contract in full or in part, the Institute reserves the right to invoke performance bank guarantee and/or take such other steps as deemed necessary.</p> <p>IIBF may at its discretion terminate the contract if it is found that the services rendered by the bidder are not satisfactory and may invoke performance guarantee.</p>
	17.2	Either party shall also be entitled to terminate this agreement by giving written notice to the other to take effect as specified in the notice if:
	17.2.1	The other becomes insolvent or a receiver is appointed over any of such other party's property or assets.
	17.2.2	The other goes into liquidation, except for the purposes of amalgamation or restructuring and the company resulting there from effectively agrees to be bound by or assume the obligations imposed on such other under this agreement.
	17.2.3	The other ceases, or threatens to cease to carry on business.



Force Majeure	18	Neither party shall be in default under this agreement by reason of its failure or delay in the performance of its obligation if such failure or delay is caused by acts of God, Government laws or regulations, war or any other cause beyond its own control and without its fault or negligence.
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Governing Law	19	The Agreement is governed by the laws of India and in the event of dispute arising there from, only the Courts in Mumbai, Maharashtra alone have jurisdiction to try and entertain the dispute
Dispute Resolution	20	In the event of any dispute or difference arising out of or relating to this agreement or the breach thereof, the parties hereto shall use their best endeavors to settle such disputes or differences. To this effect they shall consult and negotiate with each other in good faith and understanding of their mutual interests to reach a just and equitable solution satisfactorily to both parties.
Service of Notice	21	<p>All notices, requests, consents, demands and communications provided for by this Agreement shall be in writing and shall (unless otherwise specifically provided herein) be deemed given when mailed via airmail, by registered or certified mail, or by an international fast courier addressed to the address of the parties as provided in this Section</p> <p>As to ----- (Name and Address of (Service Provider's Name))</p> <p>As to Indian Institute Banking & Finance Chief Executive Officer Kohinoor City, Commercial II, Tower I, Second Floor, Kiro Road, Kurla – West, Mumbai – 400 070.</p>



Construction	22	The article headings in this Agreement are provided for reference only and are not intended to be a part of or to affect the meaning or interpretation of this Agreement.
	22.1	References to Clauses and Annexures are references to the Clauses of and Annexures to this Agreement. Words and expressions in the Annexures shall (save where the context otherwise requires) have the same meaning throughout this Agreement.
Consensus	23	The parties acknowledge that they have read this Agreement and its Annexures, understand them and agree to be bound by their terms and conditions and further agree that this Agreement and its Annexures are the complete and exclusive state of the agreement between the parties, superseding all prior proposals or other agreements, oral or written and all other communications relating to the subject.
Counterparts	24	This Agreement may be executed in two (2) or more counterparts, all of which shall be considered one and the same agreement and each of which shall be deemed an original.
Waiver	25	The failure of either party to enforce at any time or for any period any one or more of the terms or conditions of this Agreement shall not be a waiver of them or of the right at any time subsequently to enforce all terms and conditions of this Agreement.
Rights and Remedies Cumulative	26	All rights and remedies available to either of the parties under the terms of this Agreement or under the general law shall be cumulative and no exercise by either of the parties of any such right or remedy shall restrict or prejudice the exercise of any other right or remedy granted by this Agreement or otherwise available to it.



Non- Solicitation	27	During the period of this agreement, both parties agree to refrain from soliciting or employing or engaging in any capacity, directly or indirectly, any employee of other party.
--------------------------	----	---

IN WITNESS WHEREOF, the parties hereto have signed this Agreement on the day and the year first above written.

Service Provider:

Name:

Designation:

IIBF:

Name:

Designation:



Annexure –V (Part A)

Website :

1. IIBF Website (www.iibf.org.in)

(i) Informational details:

The informational part of the website must cover and disseminate all the details of the products and services offered by the Institute covering the following pages of website:

(ii) Home page:

- The Home page must display a time stamp indicating the following:
 - Date on which the information was posted on the website.
 - Date on which the content was last reviewed and/or modified.
- Home page must be accessible from any other page in the website.
- Separate webpage link has to be provided on top of the home page to navigate to the PDC's of IIBF.
- There will be links to display details for various classes of business of IIBF i.e. like Training, Seminars, and Certifications etc. On clicking each line it should take to a page which should give details of these items and short write up on our strengths. Each line would require one page which can be graphically enhanced.
- Hit counter, which would track the number of hits from various geographical areas, should be available.

(iii) Mini menu:

Members / Candidates grievance resolution system

- E-Learning
- Learning Tree
- BC/BF
- Apply Now
- Login

(vi) Main menu:

- [Home](#)
- [CEO Message](#)
- [Management](#)
- [Feedback](#)
- [Archive](#)
- [Tender](#)
- [Career](#)
- [Press](#)
- [CSR Policy](#)



- [BFSI Course](#)
- [Contact Us](#)
- [Facebook](#)
- [YouTube](#)
- [Email](#)

(v) CSR Policy

(vi) Search Field

- A search field should be provided to search entire website based on certain key words.

(vii) Running Photo/Media Gallery:

An advanced photo gallery should be developed to publish best quality photos on the website. Some of the unique features of the Photo gallery should be:

- Should have facility to view/add/edit/delete Images in JPEG, JPG, PNG, GIF and SWF formats etc.
- To allow uploading of Image Name, Image, Image Description and Meta tags for each image.
- Should be accessible across all browsers like Internet Explorer, Mozilla Firefox, Google Chrome, Safari, Opera etc. and on all different resolutions.
- Event-wise photographs should be listed under this section. Each photograph would have a brief description.
- All photographs would be listed in thumb nail (small) size and on clicking on the photograph it should be opened in a new window with original size.
- Events Calendar: List along with details of all forthcoming events should be mentioned under this section. When the date of event passes it should automatically be moved to archives section under events.

(viii) Running Ticker Notices:

- A running ticker must be provided on the home page of the website. This portion will display the latest notices of the of the Institute covering all the products and services

2. Site Map of the Institute:

(i) CEO Message

(ii) Management

- [Governing Council](#)
- [Executive Committee](#)
- [Examination Committee](#)
- [Education & Training Committee](#)
- [IT Committee](#)



(iii) Feedback

- IIBF Appreciation
- Ordinary Members Feedback
- Institutional Members Feedback

(iv) Archives

- Annual Report
 - o 2016-17
 - o 2015-16
 - o 2014-15
 - o 2013-14
- CEO Message
- Bank Quest
- IIBF Vision
- Memorial Lectures
- IBSS-2009
- 10th Bank HR Conference
- New Courses - Launched
- APABI International Conference 2014
- APABI International Conference 2015
- International Conference 2018
- Inclusive Banking
- Press
- IIBF History Book

(v) Tender

(vi) Careers

(vii) Press

- Release News
- Press News

(viii) CSR Policy

- CSR policy
- CSR Committee

(ix) Membership

- Classes of Membership
- Duplicate Membership I-card Registration
- MEMBERS / CANDIDATES SUPPORT SERVICES

(x) EXAMINATIONS / COURSES



- Examinations / Courses at a Glance
- Admit Letter
- Provisional Score Card
- Results / Consolidated Mark sheet
- Flagship Courses
 - JAIB (Junior Associate Of IIB&F)
 - CAIB (Certified Associate Of IIB&F)
 - CAIB Elective Subjects as Separate Certificate Examination
 - Diploma In Banking & Finance
- Diploma Courses
 - Diploma In Banking Technology
 - Diploma In Treasury Investment and Risk Management (OLD SYLLABUS)
 - Diploma In Treasury Investment and Risk Management (REVISED SYLLABUS)
 - Diploma In International Banking & finance
 - Diploma In Commodity Derivatives For Bankers
 - Advanced Wealth Management (OLD SYLLABUS)
 - Advanced Wealth Management (REVISED SYLLABUS)
 - Diploma In Home Loan Advising
 - Retail Banking
 - Urban Co-operative Banking (OLD SYLLABUS)
 - Urban Co-operative Banking (REVISED SYLLABUS)
- Blended Courses
 - Certified Bank Trainer
 - Certified Banking Compliance Professional
 - Certified Credit Officer
 - Certified Treasury Professionals
 - Risk in Financial Services
 - Certified Accounting & Audit Professional
- Certificate Courses
 - MSME
 - Certificate In Trade Finance
 - Certificate Examination In Information System Banker
 - Certificate Examination in AML/KYC
 - Certificate Examination In Customer Service & Banking Codes and Standards
 - Certificate Examination In IT Security
 - Certificate Examination In Rural Banking Operations
 - Certificate Examination In Prevention Of Cyber Crimes And Fraud Management
 - Certificate Examination In Foreign Exchange Facilities For Individuals
 - Certificate Examination In Microfinance
 - Card Operations
 - Functions of Banks
 - Basics of Banking
 - Certificate Examination For DRA
 - Certificate Examination For DRA Tele callers
 - Business Correspondents / Facilitators



- Certificate Course In Foreign Exchange
- Certificate Course In Digital Banking
- Introduction to Banking

(xii) EDUCATION

- Editorial Board
- IIBF Vision
- E-Learning
 - IDRBT Announces E-Programmes
 - E-Learning for JAIIB Course
 - E-Learning for CAIIB Course
 - E-Learning for Credit Management
 - E-Learning for MSME
 - E-learning for IT Security
 - E-learning for Cyber Crimes
 - E-Learning for AML/KYC
 - E-Learning for ITF
 - E-Learning for DTIRM
 - Achieving Customer Service Excellence
- Video Lectures
 - JAIIB/DB&F
 - CAIIB
 - MSME
 - Business Correspondents (BCs)
- Bank Quest
- Subject Updates
- Master Circulars / Directions
- Continuing Professional Development (CPD)
- Publication
 - List of Books
 - Address of Publisher
- Finance Quotient
- Fin@Quest

(xiii) TRAINING / CONTACT CLASSES

- Training
 - Credit Analysis
 - Trainers Training Programme
 - Business Ethics and Corporate Governance
 - Statutory Annual Audit
 - Effective Branch Management
 - Digital Marketing & Use of Big Data Analytics in Customer Relationship Management
 - Programme on Foreign Exchange Operations
 - Preventive Vigilance and Fraud Management
 - Housing Finance
 - Law Officers Program
 - Financial Services Marketing Strategy



- Compliance In Banking
- NPA Management in Banks
- Trade Finance
- Financing MSME
- Program For IT Security & Prevention Of Cyber Crimes
- Agricultural Financing
- Programme For First Time Branch Managers
- KYC/AML & CFT
- Risk Management
- Recovery Management
- Certified Credit Officer
- Certified Treasury Professionals
- Certified Bank Trainer
- Digital Banking & Financial Inclusion
- Project Finance
- Credit Appraisal
- Understanding Banking Customer
- Training Department
- Training Department- Contact Details
- Credit Monitoring
- Contact Classes
 - Training Department- Contact Details

(xiv) RESEARCH / COLLABORATION

- Research
 - Research Advisory Committee
 - Micro
 - Macro
 - Diamond Jubilee and CH Bhabha Banking Overseas Research Fellowship
- Collaboration
 - MOU's
 - National
 - International
 - Accreditation
 - DRA
 - BC/BF
 - Others ATI

(xv) IMPORTANT ANNOUNCEMENT / NOTICE

- Exam Related Notices
- Academics Notices
- Membership Notices
- Other Notices
- Seminars / Workshops
- Memorial Lectures
 - R K Talwar Lecture
 - Sir PTML Lecture



- [Annual Reports](#)
- [Knowledge Session](#)
- [On-line Learning Notice](#)

(xvi) [**Home**](#)

(xvii) [**FAQs**](#)

(xviii) [**Contact Us**](#)

- [Corporate Office](#)
- [Professional Development Centre](#)

(xix) [**Help**](#)

(xx) [**Photo Gallery**](#)

(xxi) [**Privacy Policy**](#)

(xxii) [**Terms of Use**](#)

(xxiii) [**About Us**](#)

3. Apply now

- [Membership](#)
- [Exams \(Members\)](#)
- [Exams \(Non-Members\)](#)
- [APPLY FOR DISA CERTIFICATE](#)
- [Apply for Duplicate Certificate](#)
- [Fin@Quest Subscription](#)
- [DRA Examination](#)
- [Mock Test](#)

5. Mission of the Institute:

Indian Institute of Banking & Finance (IIBF)

- The mission of the Institute is to develop professionally qualified and competent bankers and finance professionals primarily through a process of education, training, examination, consultancy / counselling and continuing professional development programs.
- [View details »](#)

6. History of the Institute:

- **Established in 1928 as a Company under Section 26**
- Established in 1928 as a Company under Section 26 of the Indian Companies Act, 1913, Indian Institute of Banking & Finance (IIBF), formerly known as The Indian Institute of Bankers (IIB), is a professional body of banks, financial institutions and their employees in India.
- [View details »](#)

- **7. Indian Institute of Banking & Finance (IIBF) Member Feedback (video clip links)**



- **8. Indian Institute of Banking & Finance (IIBF) Photo Gallery (Photo gallery links)**

9. Bottom Menu:

(i) Useful Links

- [FAQ](#)
- [Sitemap](#)
- [Help](#)
- [Photo Gallery](#)
- [Privacy Policy](#)
- [CSR Policy](#)
- [Employees & EX-Employees](#)

(ii) Contact Us

Corporate Office

- Kohinoor City Commercial - II Tower-I, 2nd & 3rd Floor, Kiroli Road, Off-L.B.S Marg Kurla- West Mumbai - 400 070
- 022-68507000
- care@iibf.org.in

(iii) View us on

No: **023370095**

(iv) About IIBF:

Established in 1928 as a Company under Section 26 of the Indian Companies Act, 1913, Indian Institute of Banking & Finance (IIBF), formerly known as The Indian Institute of Bankers (IIB), is a professional body of banks, financial institutions and their employees in India.

Corporate Office:

- Kohinoor City Commercial - II Tower-I, 2nd & 3rd Floor, Kiroli Road, Off-L.B.S Marg Kurla- West Mumbai - 400 070
- 022 - 25039746 / 9604 / 9907
- care@iibf.org.in
- **Last modified : 30-Jul-2019 2:29:00 PM**
- **Your Visitor No 009653545**
- **Best viewed with Internet Explorer 10+ or Latest versions of Google Chrome & Mozilla Firefox**
- Copyright © 2019, INDIAN INSTITUTE OF BANKING & FINANCE (IIBF), All rights reserved.



10. Live Chat Bot (IIBF Chat bot):

A chat bot facility to be provided on the website for all FAQ related queries

Note – The list of links provided is only indicative. The incoming bidder should migrate the entire content of the website and add, modify and update all existing or new links.

Existing Functional modules of website:-

IIBF Website					
Sr. No	Department	Module Name	Sub-module Name	Type	Description
1	MSS, Examination	Login	Member	Form	User will enter member no. and passwords or else can login with OTP.
	MSS, Examination		Non-Member	Form	User will enter registration no. and password
2	MSS, Examination	Membership	Ordinary Membership	Form	User will fill the form to apply for ordinary membership.
	MSS, Examination		Renewal	Form	An ordinary membership can apply for renewal of membership.
	MSS, Examination		Duplicate ID Application	Form	User will view its Basic details (Membership no. , Name, Bank/Institute Name, Date of Birth, Mobile, Email, Fee, Photo and Sign) User will select the reason of the Duplicate Id Card application
3	MSS, Examination	Scribe	NA	Form Dashboard	Can Apply For Scribe/Special Assistance/Extra Time when candidate has disability or meet with an accident in which candidate will have problem to write or complete the paper on time.
4	MSS, Examination	Duplicate Certificate	NA	Form	User will enter membership no. and others data will be auto-fetched.
5	MSS, Examination	E-Certificate	NA	Form	User will enter membership no. and certificate will be downloaded.
6	Accounts	Payment Transaction Query	NA		User will enter membership no. and Transaction no. So, that Candidate can view transaction related information here and view where transaction got stuck
7	Examination , Academics, Training	Learning Tree	NA	Static Page	User will able to download the training modules for various subject.



8	Examination , Academics, Training	E-Learning	NA	Form	User will register for e-learning so that they can opt for e-learning for the enrol exam or just to enhance knowledge.
9	MSS, Examination	Feedback	Ordinary Membership	Form	User will fill the feedback form.
	MSS, Examination		Institutional Membership	Form	User will fill the feedback form.
10	MSS	Credit Note Module	NA	Dashbo ard	It is a dashboard designed to generate credit notes of Refunded Invoices
11	IT	AGM	NA	Form Dashbo ard	The form for IIBF to apply for Annual General Meeting. Dashboard is provided for the counts of number of registration and can download .csv.
12	HR	Career	Head PDC	Form Dashbo ard	The form is generated for the HR department so that candidates can apply for the recruitment process. Dashboard is provided so that Admin can download the CV and the form for the further requirement process.
			Faculty Member		
			Deputy director		
			Assistant director		
			Junior Executive		
13	Examination	Charter Banker	NA	Form	Candidates who have passed the JAIIB can apply for JAIIB Professional Conversion Route to Associate Chartered Banker.
14	Examination	Exam Query	NA	Form	It is used to recover the correct fees from the candidate in case of wrong fees taken
15	Examination	Professional Banker	Credit	Form	The Professional Banker is a gold level qualification which will provide cutting edge knowledge to the professionals in the banking & finance domains. It aims to create a pool of professionals in specialized and interlinked verticals to meet the emerging challenges.
			Treasury	Form	
			Accounting & Audit	Form	
			Information technology	Form	
			International banking	Form	
16	Examination , MSS	Certificate Verification	NA	Form	User will able to verify the certificate.
17	Examination , MSS	GST Query	NA	Form	IT is used to recover the GST from the candidate



Annexure – V(Part – B)

Existing Transactional

Portal:

(Under Apply Now)

The transactional activities - (Online Payment Activities)

1. Membership(menu)

- **Login for already registered Members**
 - **Edit Member profile**
- **Instructions for potential Members:**
 - Membership Frequently Asked Questions
 - How to Apply for membership
 - Instructions to new Applicants
 - ID Proof for membership
- **Ordinary Membership Registration:(programs)**
 - **Application for New Membership**
 - **Application for renewal of Membership**
 -
- **Application for Duplicate Member I-card**
- **KYC Module for member authentication with live photo capturing with photo cropping facility**

Note:

1. Provision of payment of application fee through Debit card/ Credit card / Internet Banking is available.
2. Those who are already registered life member, no need to apply again

2. Examinations(for members)(menu):

(i) General Instructions to candidates:(menu item- the below given information may be displayed)

- **IMPORTANT NOTE FOR CANDIDATES DESIROUS TO APPLY FOR MORE THAN ONE EXAMINATION**
Institute is conducting certain examinations simultaneously on the same day. Candidates are, therefore, requested to see the time table carefully and apply for only one **examination scheduled to be conducted on a date given in the time table.**
- **Login Id and Password is not required for Examination Online Registration.**

- (ii) Rules / Syllabus / Eligibility for Examinations
- (iii) Important Instructions for Examinations
- (iv) How to Apply for Examinations
- (v) Flag ship exams



- **JAIIB**
 - **Exam Instructions**
 - **Registration Form**
- **CAIIB**
 - **Exam Instructions**
 - **Registration Form**
- **SOB**
 - **Exam Instructions**
 - **Registration Form**
- **(vi) Diploma Courses(members):**
 - 1. All diploma courses List of Value to be displayed:**
 - 2. Exam Instructions**
 - 3. Registration Form**
- **(vii) Certificate Examinations(Remote Proctored):**
 - 1: Anti-Money Laundering And Know Your Customer (RPE)**
 - **Exam Instructions**
 - **Registration Form**
 - 2: Certificate Course in Digital Banking (RPE)**
 - **Exam Instructions**
 - **Registration Form**
 - 3: Certificate Course In Foreign Exchange (RPE)**
 - **Exam Instructions**
 - **Registration Form**
 - 4: Certificate course on MSME (RPE)**
 - **Exam Instructions**
 - **Registration Form**
 - 5: CERTIFICATE EXAMINATION FOR BUSINESS CORRESPONDENTS / FACILITATORS**
 - **Exam Instructions**
 - **Registration Form**
 - 6: Certificate in International Trade Finance (RPE)**
 - **Exam Instructions**
 - **Registration Form**
 - 7: CERTIFIED CREDIT PROFESSIONAL (RPE)**
 - **Exam Instructions**
 - **Registration Form**
 - 8: Prevention of Cyber Crimes and Fraud Management (RPE)**
 - **Exam Instructions**
 - **Registration Form**
- **(viii) Self-Paced E-learning Courses**
 - **Digital Banking**



- **Ethics in Banking**

- **(ix) Blended Exams:**
 - **All diploma courses List of Value to be displayed:**
 - **Exam Instructions**
 - **Registration Form**
- **(x) Customized Exams**
 - **All diploma courses List of Value to be displayed:**
 - **Exam Instructions**
 - **Registration Form**
- **(xi) Scribe for Examination(below information will be shown after clicking the menu item)**
 - GUIDELINES/RULES FOR USING SCRIBE BY VISUALLY IMPAIRED & ORTHOPEADICALLY CHALLENGED CANDIDATES
 - Application For Scribe/Special Assistance/Extra Time
- **In case payment is made through net banking or debit card and transaction is not successful/complete, the fees will be refunded by concern bank within 10-12 working days. if the payment is made vide credit card, the amount will be re-credited to candidate's account by the bank in the next billing cycle of credit card. Refund timeline indicated is approximate, as the processing of refund is dependent on multiple organization and working days/holidays of bank/financial Institutes.**

Note: Provision of payment of application fee through Debit card/ Credit card / Internet Banking is available.

3. Examinations(for non-members):

- **IMPORTANT NOTE FOR CANDIDATES DESIROUS TO APPLY FOR MORE THAN ONE EXAMINATION**
Institute is conducting certain examinations simultaneously on the same day. Candidates are, therefore, requested to see the time table carefully and apply for only one **examination scheduled to be conducted on a date given in the time table.**
- **Login Id and Password is not required for Examination Online Registration.**
 - **(i) General Instructions to candidates:**
 - (ii) Rules / Syllabus / Eligibility for Examinations
 - (iii) Important Instructions for Examinations
 - (vi) How to Apply for Examinations
 - **(v) DB&F Examination**
 - **Exam Instructions**
 - **Registration Form**
 - **(vi) Certificate Examinations(Remote Proctored):**
 - 1: **Anti-Money Laundering And Know Your Customer (RPE)**



- **Exam Instructions**
- **Registration Form**
- 2: Certificate Course in Digital Banking (RPE)**
 - **Exam Instructions**
 - **Registration Form**
- 3: Certificate Course In Foreign Exchange (RPE)**
 - **Exam Instructions**
 - **Registration Form**
- 4: Certificate course on MSME (RPE)**
 - **Exam Instructions**
 - **Registration Form**
- 5: CERTIFICATE EXAMINATION FOR BUSINESS CORRESPONDENTS / FACILITATORS**
 - **Exam Instructions**
 - **Registration Form**
- 6: Certificate in International Trade Finance (RPE)**
 - **Exam Instructions**
 - **Registration Form**
- 7: CERTIFIED CREDIT PROFESSIONAL (RPE)**
 - **Exam Instructions**
 - **Registration Form**
- 8: Prevention of Cyber Crimes and Fraud Management (RPE)**
 - **Exam Instructions**
 - **Registration Form**
- **(vii) Self-Paced E-learning Courses**
 - **Digital Banking**
 - **Ethics in Banking**
- (viii) Scribe for Examination**
 - GUIDELINES/RULES FOR USING SCRIBE BY VISUALLY IMPAIRED & ORTHOPEADICALLY CHALLENGED CANDIDATES
 - Application For Scribe/Special Assistance/Extra Time

Note: Provision of payment of application fee through Debit card/ Credit card / Internet Banking is available.

- **In case payment is made through net banking or debit card and transaction is not successful/ complete, the fees will be refunded by concern bank within 10-12 working days. if the payment is made vide credit card, the amount will be re-credited to candidate's account by the bank in the next billing cycle of credit card. Refund timeline indicated is approximate, as the processing of refund is dependent on multiple organization and working days/holidays of bank/financial Institutes.**



- 4.Application for DISA certificate:
- 5.Application for CISI Examination(level – I)
- 6.Application for JAIIB Professional Conversion Route to Associate Chartered Banker
- 7.Application for GARP FRR exam
- 8.Application for Professional Banker Qualification
- 9.Application for Duplicate Certificate
- 10.Download E-certificate
- 11.Application for FinQuest Subscription
- 12.DRA Examination
- 13.Mock Test
- 14. Admin module for above activities

Note: The above links/modules are only indicative and the actual links/modules shall be finalized at the time of finalization of the SRS (systems requirements specifications)

Existing List of Portal Modules currently integrated with payment gateway:

Sr.No	Module Name
1	Exam recovery Module
2	GST Recovery Module
3	Exams Registration (ordinary - Members)
4	Exams Registration (- Non members)
5	Membership registration
6	Membership Renewal
7	Exam Duplicate Certificate
8	Duplicate I card/Certificate
9	Registration for Blended Training
10	Blended
11	Enrolment for Contact classes
12	Registration for Finquest
13	Exam training
14	Special ELearning
15	Chartered Banker
16	Application for DISA
17	Application for CISI
19	DRA Agency Registration
20	Application for AMP
21	Enrolment for XLRI
22	Enrolment for GARP Exam
23	Registration for CPD
24	Enrolment for Professional Banker new module
25	Query status API



26	Refund API
27	Double verification crons
28	Auto refund crons
29	JBIMS
30	DRA add new center
31	Institute Payment Subscription

Note: The above links/modules are only indicative and the actual links/modules shall be finalized at the time of finalization of the SRS (systems requirements specifications)

Existing Sample List of Reports on the Portal

1. Date wise all transactions with e-mail options (MIS)
2. User management with Roles(Admin)
3. Successful payment transactions date wise(PG)
4. Failure of Transactions date wise(PG)
5. Transaction failure reasons date wise(PG)
6. Payment option wise transaction details(PG)
7. Duplicate I-Card – Successful transactions(PG)
8. Duplicate I-Card – Failure of transactions(PG)
9. Duplicate I-Card – Transaction Failure reasons(PG)
10. Duplicate I-Card – Payment option wise report(PG)
11. Downloading the data from website-----☐ Complete data(Admin)
 - ☐ Edit Profile data
 - ☐ Audit log
 - ☐ Images of photos, signatures and I-Cards
 - ☐ Audit log of images
12. Search options ----- ☐ Successful Transactions with membership number (MIS)
 - ☐ Failure of transaction
13. De-activation of new membership (Admin)
14. Payment refund details from the payment gateway vendor (Admin)



15. Masters (Admin)

- Examination Masters
- Period master
- Miscellaneous Parameters Master
- Subject Master
- Centre Master
- Fee master
- Medium master
- Institute master
- Exam activation masterEligible candidate master
- State code master
- Designation Master
- Qualification Master

16. Dashboard (MIS) (with reports)

17. AMP successful transactions (PG)

18. AMP failure transactions (PG)

19. AMP transactions failure reasons (PG)

20. CMS Transactions reports (MIS)

Note: The above list of reports are tentative. Actual number of reports shall be determined during finalization of SRS of the website



Existing Functional modules of Transactional Portal:-

Exams						
Sr. No	Department	Module Name	Sub-module Name	Type	M/NM	Description
1	Examination, Academic	Special E-Learning	Digital Banking	Form	Both	User will able to apply for Digital Banking Exam
				Result	Both	User will able to view result of Digital Banking Exam
	Examination, Academic		Ethics	Form	Both	User will able to apply for Ethics Exam
				Result	Both	User will able to view result of Ethics Exam
	Examination, Academic		Climate Risk & Sustainable Finance (Foundation)	Form	Both	User will able to apply for Climate Risk & Sustainable Finance (Foundation) Exam
				Result	Both	User will able to view result of Climate Risk & Sustainable Finance (Foundation) Exam
	Examination, Academic		Climate Risk & Sustainable Finance (Advance)	Form	Both	User will able to apply for Climate Risk & Sustainable Finance (Advance) Exam
				Result	Both	User will able to view result of Climate Risk & Sustainable Finance (Advance) Exam
2	Examination, Academic	Flagship Courses	JAIIB	Form	Member	User will able to apply for JAIIB Exam
				Result	Member	User will able to view result of JAIIB Exam
				Admit card	Member	User will able to view admit card of JAIIB Exam
	Examination, Academic		CAIIB	Form	Member	User will able to apply for CAIIB Exam
				Result	Member	User will able to view result of CAIIB Exam
				Admit card	Member	User will able to view admit card of CAIIB Exam
	Examination, Academic	CAIIB Elective	Form	Member	User will able to apply for CAIIB Elective Exam	



				Result	Member	User will able to view result of CAIIB Elective Exam
				Admit card	Member	User will able to view admit card of CAIIB Elective Exam
	Examination, Academic		DB & F	Form	Non-Member	User will able to apply for DBF Exam
				Result	Non-Member	User will able to view result of DBF Exam
				Admit card	Non-Member	User will able to view admit card of DBF Exam
	3		Examination, Academic	Diploma Courses	Diploma In Banking Technology	Form
Result		Both				User will able to view result of Diploma In Banking Technology Exam
Admit card		Both				User will able to view admit card of Diploma In Banking Technology Exam
Examination, Academic			Diploma In Treasury Investment and Risk Management	Form	Both	User will able to apply for Diploma In Treasury Investment and Risk Management Exam
				Result	Both	User will able to view result of Diploma In Treasury Investment and Risk Management Exam
				Admit card	Both	User will able to view admit card of Diploma In Treasury Investment and Risk Management Exam
Examination, Academic			Diploma In International Banking & finance	Form	Both	User will able to apply for Diploma In International Banking & finance Exam
				Result	Both	User will able to view result of Diploma In International Banking & finance Exam
				Admit card	Both	User will able to view admit card of Diploma In International



						Banking & finance Exam
	Examination, Academic		Advanced Wealth Management	Form	Both	User will able to apply for Advanced Wealth Management Exam
				Result	Both	User will able to view result of Advanced Wealth Management Exam
				Admit card	Both	User will able to view admit card of Advanced Wealth Management Exam
	Examination, Academic		Diploma In Retail Banking	Form	Both	User will able to apply for Diploma In Retail Banking Exam
				Result	Both	User will able to view result of Diploma In Retail Banking Exam
				Admit card	Both	User will able to view admit card of Diploma In Retail Banking Exam
	Examination, Academic		Diploma In Urban Co-operative Banking	Form	Both	User will able to apply for Diploma In Urban Co-operative Banking Exam
				Result	Both	User will able to view result of Diploma In Urban Co-operative Banking Exam
				Admit card	Both	User will able to view admit card of Diploma In Urban Co-operative Banking Exam
4	Examination, Academics, Training	Blended Courses	Compliance	Form	Member	User will able to apply for Compliance Exam
				Result	Member	User will able to view result of Compliance Exam
	Examination, Academics, Training		Bank Trainer	Form	Both	User will able to apply for Bank Trainer Exam
				Result	Both	User will able to view result of Bank Trainer Exam
	Examination, Academics, Training		Treasury	Form	Both	User will able to apply for Treasury Exam



				Result	Both	User will able to view result of Treasury Exam
	Examination, Academics, Training		Credit	Form	Both	User will able to apply for Credit Exam
				Result	Both	User will able to view result of Credit Exam
	Examination, Academics, Training		Risk in Financial service	Form	Both	User will able to apply for Risk in Financial service Exam
				Result	Both	User will able to view result of Risk in Financial service Exam
	Examination, Academics, Training		Accounting & Audit	Form	Both	User will able to apply for Accounting & Audit Exam
				Result	Both	User will able to view result of Accounting & Audit Exam
5	Examination, Academic	Certificate course	Foreign Exchange Facilities For Individuals	Form	Both	User will able to apply for Foreign Exchange Facilities For Individuals Exam
				Result	Both	User will able to view result of Foreign Exchange Facilities For Individuals Exam
				Admit card	Both	User will able to view admit card of Foreign Exchange Facilities For Individuals Exam
	Examination, Academic		Microfinance	Form	Both	User will able to apply for Microfinance Exam
				Result	Both	User will able to view result of Microfinance Exam
				Admit card	Both	User will able to view admit card of Microfinance Exam
	Examination, Academic, DRA		DRA	Form	Both	User will able to apply for DRA Exam
				Result	Both	User will able to view result of DRA Exam
				Admit card	Both	User will able to view admit card of DRA Exam
				Training	Both	User will able to apply for DRA Training



	Examination, Academic, Training	Business Correspondents/ Facilitators	Form	Both	User will able to apply for BCBF Exam
	Result		Both	User will able to view result of BCBF Exam	
	Admit card		Both	User will able to view admit card of BCBF Exam	
	Training		Both	User will able to apply for BCBF Training	
	Examination, Academic	Non-Banking Financial Companies	Form	Both	User will able to apply for Non-Banking Financial Companies Exam
			Result	Both	User will able to view result of Non-Banking Financial Companies Exam
			Admit card	Both	User will able to view admit card of Non-Banking Financial Companies Exam
	Examination, Academic	Small Finance Banks	Form	Both	User will able to apply for Small Finance Banks Exam
			Result	Both	User will able to view result of Small Finance Banks Exam
			Admit card	Both	User will able to view admit card of Small Finance Banks Exam
	Examination, Academic	Ethics in Banking	Form	Both	User will able to apply for Ethics in Banking Exam
			Result	Both	User will able to view result of Ethics in Banking Exam
			Admit card	Both	User will able to view admit card of Ethics in Banking Exam
	Examination, Academic	Specialists Officers of Banks	Form	Both	User will able to apply for Specialists Officers of Banks Exam
			Result	Both	User will able to view result of Specialists Officers of Banks Exam
			Admit card	Both	User will able to view admit card of



						Specialists Officers of Banks Exam
6	Examination, Academic	RPE	Strategic Management & Innovations in Banking	Form	Both	User will able to apply for Strategic Management & Innovations in Banking Exam
				Result	Both	User will able to view result of Strategic Management & Innovations in Banking Exam
				Admit card	Both	User will able to view admit card of Strategic Management & Innovations in Banking Exam
	Examination, Academic		Emerging Technologies	Form	Both	User will able to apply for Emerging Technologies Exam
				Result	Both	User will able to view result of Emerging Technologies Exam
				Admit card	Both	User will able to view admit card of Emerging Technologies Exam
	Examination, Academic		MSME	Form	Both	User will able to apply for MSME Exam
				Result	Both	User will able to view result of MSME Exam
				Admit card	Both	User will able to view admit card of MSME Exam
	Examination, Academic		AML/KYC	Form	Both	User will able to apply for AML/KYC Exam
				Result	Both	User will able to view result of AML/KYC Exam
				Admit card	Both	User will able to view admit card of AML/KYC Exam
	Examination, Academic		Prevention Of Cyber Crimes And Fraud Management	Form	Both	User will able to apply for Prevention Of Cyber Crimes And Fraud Management Exam
				Result	Both	User will able to view result of Prevention Of Cyber Crimes And



					Fraud Management Exam
			Admit card	Both	User will able to view admit card of Prevention Of Cyber Crimes And Fraud Management Exam
	Examination, Academic	Foreign Exchange	Form	Both	User will able to apply for Foreign Exchange Exam
			Result	Both	User will able to view result of Foreign Exchange Exam
			Admit card	Both	User will able to view admit card of Foreign Exchange Exam
	Examination, Academic	IT Security	Form	Both	User will able to apply for IT Security Exam
			Result	Both	User will able to view result of IT Security Exam
			Admit card	Both	User will able to view admit card of IT Security Exam
	Examination, Academic	Information System Banker	Form	Both	User will able to apply for Information System Banker Exam
			Result	Both	User will able to view result of Information System Banker Exam
			Admit card	Both	User will able to view admit card of Information System Banker Exam
	Examination, Academic	Digital Banking	Form	Both	User will able to apply for Digital Banking Exam
			Result	Both	User will able to view result of Digital Banking Exam
			Admit card	Both	User will able to view admit card of Digital Banking Exam
	Examination, Academic	International Trade Finance	Form	Both	User will able to apply for International Trade Finance Exam
			Result	Both	User will able to view result of International Trade Finance Exam
			Admit card	Both	User will able to view admit card of



						International Trade Finance Exam
	Examination, Academic		Resolution of Stressed Assets with Special Emphasis on Insolvency and Bankruptcy Code, 2016 for Bankers	Form	Both	User will be able to apply for Resolution of Stressed Assets with Special Emphasis on Insolvency and Bankruptcy Code, 2016 for Bankers Exam
				Result	Both	User will be able to view result of Resolution of Stressed Assets with Special Emphasis on Insolvency and Bankruptcy Code, 2016 for Bankers Exam
				Admit card	Both	User will be able to view Admit card of Resolution of Stressed Assets with Special Emphasis on Insolvency and Bankruptcy Code, 2016 for Bankers Exam
7	Examination, Academic	AMP	NA	Form	Both	User will be able to apply for AMP Exam (Self/Bank)
				Result	Both	User will be able to view result of AMP Exam
				Admit card	Both	User will be able to view admit card of AMP Exam
				Dashboard	Both	User will be able to view dashboard of AMP Exam
8	Examination, Academic	DISA	NA	Form	Member	User will be able to apply for DISA Exam
				Result	Member	User will be able to view result of DISA Exam
				Admit card	Member	User will be able to view admit card of DISA Exam
9	Examination, Academic	CISI	NA	Form	Member	User will be able to apply for CISI Exam
				Result	Member	User will be able to view result of CISI Exam



				Admit card	Member	User will able to view Admit card of CISI Exam
10	Examination, Academic	CFP	NA	Form	Member	User will able to apply for CFP Exam
				Result	Member	User will able to view result of CFP Exam
				Admit card	Member	User will able to view Admit card of CFP Exam
11	Examination, Academic	GARP-FRR	NA	Form	Both	User will able to apply for GARP Exam
				Result	Both	User will able to view result of GARP Exam
				Admit card	Both	User will able to view Admit card of GARP Exam
				Dashboard	Both	User will able to view dashboard of GARP Exam
12	Examination	IPPB	NA	Form	Both	User will able to apply for IPPB Exam
				Result	Both	User will able to view result of IPPB Exam
				Admit card	Both	User will able to view Admit card of IPPB Exam
				Dashboard	Both	User will able to view dashboard of IPPB Exam
13	Academic	CPD	NA	Form	Both	Continuing Professional Development [CPD] demonstrates continuous learning allowing you to take control of your career and provides valuable evidence of commitment to learning and self-development. By taking control of your own development, you can respond to your employers' and customers' expectations while shaping your career in an increasingly competitive industry.



14	Examination, Academic	JBIMS	NA	Form	Both	User will able to apply for JBIMS Exam (Self/Bank)
				Result	Both	User will able to view result of JBIMS Exam
				Admit card	Both	User will able to view admit card of JBIMS Exam
				Dashboard	Both	User will able to view dashboard of JBIMS Exam
15	Examination, Academic	XLRI	NA	Form	Both	User will able to apply for XLRI Exam (Self/Bank)
				Result	Both	User will able to view result of XLRI Exam
				Admit card	Both	User will able to view admit card of XLRI Exam
				Dashboard	Both	User will able to view dashboard of XLRI Exam



Examination						
Sr. No	Department	Module Name	Sub-module Name	Type	M/NM	Description
1	Examination, Academic	Special E-Learning	Digital Banking	Form	Both	User will able to apply for Digital Banking Exam
				Result	Both	User will able to view result of Digital Banking Exam
	Examination, Academic		Ethics	Form	Both	User will able to apply for Ethics Exam
				Result	Both	User will able to view result of Ethics Exam
	Examination, Academic		Climate Risk & Sustainable Finance (Foundation)	Form	Both	User will able to apply for Climate Risk & Sustainable Finance (Foundation) Exam
				Result	Both	User will able to view result of Climate Risk & Sustainable Finance (Foundation) Exam
	Examination, Academic		Climate Risk & Sustainable Finance (Advance)	Form	Both	User will able to apply for Climate Risk & Sustainable Finance (Advance) Exam
				Result	Both	User will able to view result of Climate Risk & Sustainable Finance (Advance) Exam
2	Examination, Academic	Flagship Courses	JAIIB	Form	Member	User will able to apply for JAIIB Exam
				Result	Member	User will able to view result of JAIIB Exam
				Admitcard	Member	User will able to view admitcard of JAIIB Exam
	Examination, Academic		CAIIB	Form	Member	User will able to apply for CAIIB Exam



				Result	Member	User will able to view result of CAIIB Exam
				Admitcard	Member	User will able to view admitcard of CAIIB Exam
	Examination, Academic		CAIIB Elective	Form	Member	User will able to apply for CAIIB Elective Exam
				Result	Member	User will able to view result of CAIIB Elective Exam
				Admitcard	Member	User will able to view admitcard of CAIIB Elective Exam
	Examination, Academic		DB & F	Form	Non-Member	User will able to apply for DBF Exam
				Result	Non-Member	User will able to view result of DBF Exam
				Admitcard	Non-Member	User will able to view admitcard of DBF Exam
	3		Examination, Academic	Diploma Courses	Diploma In Banking Technology	Form
Result		Both				User will able to view result of Diploma In Banking Technology Exam
Admitcard		Both				User will able to view admitcard ofDiploma In Banking Technology Exam
Examination, Academic			Diploma In Treasury Investment and Risk Management	Form	Both	User will able to apply for Diploma In Treasury Investment and Risk Management Exam
				Result	Both	User will able to view result of Diploma In Treasury Investment and Risk Management Exam
				Admitcard	Both	User will able to view admitcard of Diploma In Treasury Investment and Risk Management Exam



	Examination, Academic	Diploma In International Banking & finance	Form	Both	User will able to apply for Diploma In International Banking & finance Exam
			Result	Both	User will able to view result of Diploma In International Banking & finance Exam
			Admitcard	Both	User will able to view admitcard of Diploma In International Banking & finance Exam
	Examination, Academic	Advanced Wealth Management	Form	Both	User will able to apply for Advanced Wealth ManagementExam
			Result	Both	User will able to view result of Advanced Wealth Management Exam
			Admitcard	Both	User will able to view admitcard of Advanced Wealth Management Exam
	Examination, Academic	Diploma In Retail Banking	Form	Both	User will able to apply for Diploma In Retail Banking Exam
			Result	Both	User will able to view result of Diploma In Retail Banking Exam
			Admitcard	Both	User will able to view admitcard of Diploma In Retail Banking Exam
	Examination, Academic	Diploma In Urban Co-operative Banking	Form	Both	User will able to apply for Diploma In Urban Co-operative Banking Exam
			Result	Both	User will able to view result of Diploma In Urban Co-operative Banking Exam



				Admitcard	Both	User will able to view admitcard of Diploma In Urban Co-operative BankingExam
4	Examination, Academics, Training	Blended Courses	Compliance	Form	Member	User will able to apply for Compliance Exam
				Result	Member	User will able to view result of Compliance Exam
	Examination, Academics, Training		Bank Trainer	Form	Both	User will able to apply for Bank Trainer Exam
				Result	Both	User will able to view result of Bank Trainer Exam
	Examination, Academics, Training		Treasury	Form	Both	User will able to apply for Treasury Exam
				Result	Both	User will able to view result of TreasuryExam
	Examination, Academics, Training		Credit	Form	Both	User will able to apply for Credit Exam
				Result	Both	User will able to view result of Credit Exam
	Examination, Academics, Training		Risk in Financial service	Form	Both	User will able to apply for Risk in Financial service Exam
				Result	Both	User will able to view result of Risk in Financial service Exam
	Examination, Academics, Training		Accounting & Audit	Form	Both	User will able to apply for Accounting & Audit Exam
				Result	Both	User will able to view result of



						Accounting & Audit Exam
5	Examination, Academic	Certificate course	Foreign Exchange Facilities For Individuals	Form	Both	User will able to apply for Foreign Exchange Facilities For Individuals Exam
				Result	Both	User will able to view result of Foreign Exchange Facilities For Individuals Exam
				Admitcard	Both	User will able to view admitcard of Foreign Exchange Facilities For Individuals Exam
	Examination, Academic		Microfinance	Form	Both	User will able to apply for Microfinance Exam
				Result	Both	User will able to view result of Microfinance Exam
				Admitcard	Both	User will able to view admitcard of Microfinance Exam
	Examination, Academic, DRA		DRA	Form	Both	User will able to apply for DRA Exam
				Result	Both	User will able to view result of DRA Exam
				Admitcard	Both	User will able to view admitcard of DRA Exam
		Training		Both	User will able to apply for DRA Training	
	Examination, Academic, Traning	Business Correspondents/ Facilitators	Form	Both	User will able to apply for BCBF Exam	
			Result	Both	User will able to view result of BCBF Exam	
			Admitcard	Both	User will able to view admitcard of BCBF Exam	



			Training	Both	User will able to apply for BCBF Training
Examination, Academic	Non Banking Financial Companies	Form	Both	User will able to apply for Non Banking Financial Companies Exam	
		Result	Both	User will able to view result of Non Banking Financial Companies Exam	
		Admitcard	Both	User will able to view admitcard of Non Banking Financial Companies Exam	
Examination, Academic	Small Finance Banks	Form	Both	User will able to apply for Small Finance Banks Exam	
		Result	Both	User will able to view result of Small Finance Banks Exam	
		Admitcard	Both	User will able to view admitcard of Small Finance Banks Exam	
Examination, Academic	Ethics in Banking	Form	Both	User will able to apply for Ethics in Banking Exam	
		Result	Both	User will able to view result of Ethics in Banking Exam	
		Admitcard	Both	User will able to view admitcard of Ethics in Banking Exam	
Examination, Academic	Specialists Officers of Banks	Form	Both	User will able to apply for Specialists Officers of Banks Exam	
		Result	Both	User will able to view result of Specialists Officers of Banks Exam	
		Admitcard	Both	User will able to view admitcard of Specialists Officers of Banks Exam	



6	Examination, Academic	RPE	Strategic Management & Innovations in Banking	Form	Both	User will able to apply for Strategic Management & Innovations in Banking Exam
	Result			Both	User will able to view result of Strategic Management & Innovations in Banking Exam	
	Admitcard			Both	User will able to view admitcard of Strategic Management & Innovations in Banking Exam	
	Examination, Academic		Emerging Technologies	Form	Both	User will able to apply for Emerging Technologies Exam
				Result	Both	User will able to view result of Emerging Technologies Exam
				Admitcard	Both	User will able to view admitcard of Emerging Technologies Exam
	Examination, Academic		MSME	Form	Both	User will able to apply for MSME Exam
				Result	Both	User will able to view result of MSME Exam
				Admitcard	Both	User will able to view admitcard of MSME Exam
	Examination, Academic		AML/KYC	Form	Both	User will able to apply for AML/KYC Exam
				Result	Both	User will able to view result of AML/KYC Exam
				Admitcard	Both	User will able to view admitcard of AML/KYC Exam
	Examination, Academic		Prevention Of Cyber Crimes And Fraud Management	Form	Both	User will able to apply for Prevention Of Cyber Crimes And Fraud Management Exam



			Result	Both	User will able to view result of Prevention Of Cyber Crimes And Fraud Management Exam
			Admitcard	Both	User will able to view admitcard of Prevention Of Cyber Crimes And Fraud Management Exam
	Examination, Academic	Foreign Exchange	Form	Both	User will able to apply for Foreign Exchange Exam
			Result	Both	User will able to view result of Foreign Exchange Exam
			Admitcard	Both	User will able to view admitcard of Foreign Exchange Exam
	Examination, Academic	IT Security	Form	Both	User will able to apply for IT Security Exam
			Result	Both	User will able to view result of IT Security Exam
			Admitcard	Both	User will able to view admitcard of IT Security Exam
	Examination, Academic	Information System Banker	Form	Both	User will able to apply for Information System Banker Exam
			Result	Both	User will able to view result of Information System Banker Exam
			Admitcard	Both	User will able to view admitcard of Information System Banker Exam
	Examination, Academic	Digital Banking	Form	Both	User will able to apply for Digital Banking Exam
			Result	Both	User will able to view result of Digital Banking Exam
			Admitcard	Both	User will able to view admitcard of Digital Banking Exam



	Examination, Academic		International Trade Finance	Form	Both	User will able to apply for International Trade Finance Exam
				Result	Both	User will able to view result of International Trade Finance Exam
				Admitcard	Both	User will able to view admitcard of International Trade Finance Exam
	Examination, Academic		Resolution of Stressed Assets with Special Emphasis on Insolvency and Bankruptcy Code,2016 for Bankers	Form	Both	User will able to apply for Resolution of Stressed Assets with Special Emphasis on Insolvency and Bankruptcy Code,2016 for Bankers Exam
				Result	Both	User will able to view result of Resolution of Stressed Assets with Special Emphasis on Insolvency and Bankruptcy Code,2016 for Bankers Exam
				Admitcard	Both	User will able to view admitcard of Resolution of Stressed Assets with Special Emphasis on Insolvency and Bankruptcy Code,2016 for Bankers Exam
7	Examination, Academic	AMP	NA	Form	Both	User will able to apply for AMP Exam (Self/Bank)
				Result	Both	User will able to view result of AMP Exam
				Admitcard	Both	User will able to view admitcard of AMP Exam
				Dahsboard	Both	User will able to view dashboard of AMP Exam



8	Examination, Academic	DISA	NA	Form	Member	User will able to apply for DISA Exam
				Result	Member	User will able to view result of DISA Exam
				Admitcard	Member	User will able to view admitcard of DISA Exam
9	Examination, Academic	CISI	NA	Form	Member	User will able to apply for CISI Exam
				Result	Member	User will able to view result of CISI Exam
				Admitcard	Member	User will able to view admitcard of CISI Exam
10	Examination, Academic	CFP	NA	Form	Member	User will able to apply for CFP Exam
				Result	Member	User will able to view result of CFP Exam
				Admitcard	Member	User will able to view admitcard of CFP Exam
11	Examination, Academic	GARP-FRR	NA	Form	Both	User will able to apply for GARP Exam
				Result	Both	User will able to view result of GARP Exam
				Admitcard	Both	User will able to view admitcard of GARP Exam
				Dahsboard	Both	User will able to view dashboard of GARP Exam
12	Examination	IPPB	NA	Form	Both	User will able to apply for IPPB Exam
				Result	Both	User will able to view result of IPPB Exam
				Admitcard	Both	User will able to view admitcard of IPPB Exam
				Dashboard	Both	User will able to view dashboard of IPPB Exam



13	Academic	CPD	NA	Form	Both	Continuing Professional Development [CPD] demonstrates continuous learning allowing you to take control of your career and provides valuable evidence of commitment to learning and self-development. By taking control of your own development, you can respond to your employers' and customers' expectations while shaping your career in an increasingly competitive industry.
14	Examination, Academic	JBIMS	NA	Form	Both	User will able to apply for JBIMS Exam (Self/Bank)
				Result	Both	User will able to view result of JBIMS Exam
				Admitcard	Both	User will able to view admitcard of JBIMS Exam
				Dashboard	Both	User will able to view dashboard of JBIMS Exam
15	Examination, Academic	XLRI	NA	Form	Both	User will able to apply for XLRI Exam (Self/Bank)
				Result	Both	User will able to view result of XLRI Exam
				Admitcard	Both	User will able to view admitcard of XLRI Exam
				Dashboard	Both	User will able to view dashboard of XLRI Exam



BCBF/DRA					
Sr. No	Department	Module Name	Sub-module Name	Type	Description
DRA					
1	Examination	Admin	Home	Dashboard	User will view the registration count for the DRA training.
			Transaction	Dashboard	User will view the transaction details and can also download invoice and receipt. User can also search the transaction.
			Agency List	Dashboard	User will view the agency details and can also view the details of the particular agency.
			Faculty Master	Dashboard	User will view the faculty details and can also active or deactivate the faculty.
			Training Batch	Dashboard	User will view the training batch details and can view each batch details and candidate list in each batch. User can also search the particular batch.
				View Form	User will view batch details and can assign inspector, can perform action like reject or keep batch on hold or approve it. User can also perform batch communication with the batch agency.
			Candidate List	Dashboard	User will view the candidate list and can edit the candidate details. User can also search the particular candidate.
				Edit Form	User can edit the details of the candidate.
			Inspection Summary	Form	User will select the batch for which they have to view the inspection summary.
					User will view the summary of the batch performed by inspectors. User can also keep candidates on hold or manually realise the candidate which have been auto hold.
			Inspector MIS	Dashboard	User will view list of all the details of batch as per the inspection
			Approver NEFT Transaction	Dashboard	User will view the transaction details and verify the transaction and also view details of the transaction.
			Batch MIS	Dashboard	User will detail of the batch and which inspector has inspected the batch. User can also search particular batch.



			Batch Summary	Dashboard	User will detail of the batch and which inspector has inspected the batch. User can also search particular batch.
2	Examination	Agency	Centre	Dashboard	User will view the list of the centre present in the agency. User can view and renew the centre.
				Form	User can also add new centre entering the data required in the form.
			Faculty	Dashboard	User will view list of the faculty and edit or view the faculty details.
				Form	User can also add new faculty entering the data required in the form.
			Training Batch	Dashboard	User will view list of the batch and edit or view the batch details.
				Form	User can create the training batch
			Candidate	Form	User can add candidate in the batch.
			Review Batch and Submit to IIBF	Dashboard	User will batch details and then send the batch to super admin (IIBF) for the final approver.
			Batch Applicant Checklist	Dashboard	User will select the batch and view the details of the candidate.
			Member Status	Dashboard	User will enter the member no. and view details of each candidate with no. of attempt given for the exam.
			Result	Dashboard	User will view result of the candidate centre view. They can download it ZIP format.
			Admit card	Dashboard	User will view admit card of the candidate centre view. They can download it ZIP format.
			Transaction Details	Dashboard	User will view the transaction details and can also download invoice and receipt. User can also search the transaction.
			Change Password	Form	User will enter details present on the screen to the change password.
3	Examination	Inspector	Batch List	Dashboard	User will view list of batch details.
			Add Inspection Report	Form	User will select the batch and then fill the report to add the inspection.
			Inspection Report	Dashboard	User will view the inspection data of the particular batch.
			Change Password	Form	User will enter details present on the screen to the change password.



BCBF					
1	Examination	Admin	Dashboard	Dashboard	User will view the counts of exam and training registration.
			Training Batch	Dashboard	User will view details of training batched and can also search particular batch. User can also release or hold the candidate
			All Candidate	Dashboard	User can also view the candidate list and also can hold or release the candidate.
			NEFT Transaction	Dashboard	User will view the details of the transaction and can also download receipt, invoice.
			Reports	Reports	User will view reports of the following: 1. Inspection Summary 2. Builldesk Transaction 3. CSC Transaction 4. NEFT Transaction 5. Batch MIS 6. Exam Details Report 7. Individual Registration 8. Institution wise Batch Report 9. Candidate Eligible for Exam 10. Training Batch Details 11. Batch Action 12. Batch Communication 13. Candidates required for re-enrol for Training 14. Inspection 15. Institution
			Change Password	Form	User will enter details present on the screen to the change password.
			Masters	Dashboard	User will view all the masters: 1. Agency (Form) 2. Centre 3. Faculty 4. Inspector 5. Exam 6. Exam Activation 7. Exam Fee 8. Exam Misc 9. Exam Centre 10. Exam Medium 11. Exam Subject 12. Exam Venue 13. CSC Exam Date



2	Examination	Agency	Dashboard	Dashboard	User will view profile inform action of the agency. User can view counts of centre, batch, faculty and candidate.
			Centre	Dashboard	User will view details of centres and can also view details, change password or edit the details of the centre. User can also search particular centre.
				Form	User can add new centre by entering details in the form displayed on the screen.
			Faculty	Dashboard	User will view details of faculty and can also view details. User can also search particular faculty.
				Form	User can add new faculty by entering details in the form displayed on the screen.
			Training Batch	Dashboard	User will view details of training batched and can also search particular batch. User can also release or hold the candidate
			All Candidate	Dashboard	User can also view the candidate list and also can hold or release the candidate.
			Batch Applicant Checklist	Dashboard	User will view details of the candidate.
			Transaction Details	Dashboard	User will view the details of the transaction and can also download receipt, invoice.
			Change Password	Form	User will enter details present on the screen to the change password.
3	Examination	Centre	Faculty	Dashboard	User will view details of faculty and can also view details. User can also search particular faculty.
				Form	User can add new faculty by entering details in the form displayed on the screen.
			Training Batch	Dashboard	User will view list of the batch and edit or view the batch details.
				Form	User can create the training batch
			Candidate	Form	User can add candidate in the batch.
			Batch Applicant Checklist	Dashboard	User will view details of the candidate.
			Exam (Advance)	Form Admit Card Result	User can apply for exam.



			Exam (Basic)	Form Admit Card Result	User can apply for exam.
			Transaction	Dashboard	User will view the details of the transaction and can also download receipt, invoice, admit card
			Change Password	Form	User will enter details present on the screen to the change password.
4	Examination	Inspector	Dashboard	Dashboard	User will view total no. of inspection performed by the inspector.
			Batch List	Dashboard	User will view list of batch details.
			Add Inspection Report	Form	User will select the batch and then fill the report to add the inspection.
			Inspection Report	Dashboard	User will view the inspection data of the particular batch.
			Change Password	Form	User will enter details present on the screen to the change password.

IIBF Admin					
Sr. No	Department	Module Name	Sub-module Name	Type	Description
1	Examination, MSS, IT	Dashboard	NA	Dashboard	Dashboard shows all statistical information of registration details based on Total successful transaction till date, Total Failure Transaction and so on. 1. Redirection links for the following - - My Home - Reports - Downloads - Search - Exam Application 2. Statistical data for - - Registration Details - Profile Edit Details - Duplicate I-Card Details - Examination Details
2		Home	Date wise	Dashboard	Date wise Registration List is shown with details such as Membership Number, Candidate name, Date of Birth, Membership Password, Payment Status, Send Registration Mail and Actions like Edit Member Profile.



3			User Management	Form	Features like Add user with specific roles and permissions, User list with operations like Activate, deactivate, Edit and delete users profile
4			Admit Card Settings	Dashboard	You can download admit cards by selecting the to and from dates and the desired examination name.
5		Reports	<ol style="list-style-type: none"> 1. Registration Success 2. Registration Failure 3. Registration Failure Reason 4. Duplicate i-card Success 5. Duplicate i-card Failure 6. Dup i-card Failure Reason 7. Exam Registration Details 8. Duplicate Certificate Transactions 	Reports	<p>User will view reports of the following:</p> <ol style="list-style-type: none"> 1. Registration Success 2. Registration Failure 3. Registration Failure Reason 4. Duplicate i-card Success 5. Duplicate i-card Failure 6. Dup i-card Failure Reason 7. Exam Registration Details 8. Duplicate Certificate Transactions
6		Search	<ol style="list-style-type: none"> 1. Success Transaction 2. Failure Transaction 3. View Failure Candidate 4. Deactivation 5. Transaction Refund 	Dashboard	<p>User will search and view data of the following:</p> <ol style="list-style-type: none"> 1. Success Transaction 2. Failure Transaction 3. View Failure Candidate 4. Deactivation 5. Transaction Refund



7		Masters	1. Exam Master 2. Misc Master 3. Subject Master 4. Centre Master 5. Medium Master 6. Exam Fee Master 7. Institution Master 8. Exam Activation Master 9. Eligible Master 10. State Master 11. Designation Master 12. Inspector Master	Dashboard Form	User can view and add new masters in the system: 1. Exam Master 2. Misc Master 3. Subject Master 4. Centre Master 5. Medium Master 6. Exam Fee Master 7. Institution Master 8. Exam Activation Master 9. Eligible Master 10. State Master 11. Designation Master 12. Inspector
8		Downloads	Data	Dashboard	Download data enables admin user to search and download complete candidate registration data. Data can be downloaded in 2 file formats CSV or text file.
9			Edited Data	Dashboard	Edit profile data, images of photos, signature and I-cards along with audit logs of images. Data can be downloaded in 2 file formats CSV or text file.
10		KYC List	NA	Dashboard	KYC List is shown with details such as Membership no., Candidate name, DOB and can perform action like send registration mail.



11		As on date Report	NA	Dashboard	<p>1. Can view counts of total member applied for duplicate i-card and total membership i-card download count.</p> <p>2. Can view total new registration and total edited profile.</p> <p>3. Can view total KYC approved new member and edited member.</p> <p>4. Can view count and download CSV for pending for recommender for new member and edit member.</p> <p>5. Can view count and download CSV for pending for approver for new member and edit member.</p> <p>6. Can view count and download CSV for recommender rejected member for new member and edit member.</p> <p>7. Can view count and download CSV for approver rejected member for new member and edit member.</p>
12		Report	Query Report	Report	Query report shows details such as Membership no., Employee ID, Name, Member type, Password and can perform action like send password in the email. It will help us to view transaction details, exam details, etc. as per the requirement.
13			Membership details	Report	In Membership details fetch details like member details, refund details, invoice details, admit card details and seat full cases of any specify details.

KYC					
Sr. No	Department	Module Name	Sub-module Name	Type	Description
1	MSS				
		Dashboard	NA	Dashboard	User will find the links for the pending member list, allocating pending members and edit, new, recommender member lists
		Pending Member List	NA	Dashboard	User will view list of KYC pending member list.
		Allocating Pending Member	Member	Dashboard Form	User will view member's details and will perform KYC of the pending member. User can search for specific member



			Non-Member	Dashboard Form	User will view member's details and will perform KYC of the pending member. User can search for specific member
		New Member	Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			Non-Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			Associate Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			Fellow Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			DBF Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
		Edit Member	Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			Non-Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			Associate Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			Fellow Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			DBF Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
		Recommended Member	NA	Dashboard	User will view list of recommended members.
		Benchmark Member	NA	Dashboard Form	User will view list for members applied for benchmark. User will also perform the KYC of this members. User will be able to search the candidate.



		Scribe Member	NA	Dashboard Form	User will view list for members applied for benchmark. User will also perform the KYC of this members. User will be able to search the candidate.
Approver					
2	MSS	Dashboard	NA	Dashboard	User will find the links for the pending member list, allocating pending members and edit, new, approver recommender member lists
		Pending Member List	NA	Dashboard	User will view list of KYC pending member list.
		Allocating Pending Member	Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			Non-Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
		New Member	Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			Non-Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			Associate Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			Fellow Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			DBF Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
		Edit Member	Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			Non-Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member



			Associate Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			Fellow Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
			DBF Member	Dashboard Form	User will view members details and will perform KYC of the pending member. User can search for specific member
		Approver Recommended Member	NA	Dashboard	User will view list of approver recommended members.
		KYC Complete	NA	Dashboard	User will view list of Complete KYC.
		Benchmark Member	NA	Dashboard Form	User will view list for members applied for benchmark. User will also perform the KYC of this members. User will able to search the candidate.
		Scribe Member	NA	Dashboard Form	User will view list for members applied for benchmark. User will also perform the KYC of this members. User will able to search the candidate.

IIBF Post Login					
Sr. No	Department	Module Name	Sub-module Name	Type	Description
1	Examination	Dashboard	NA	Dashboard	Informative page
2	Examination	Apply for Exam	NA	Form	User will be able to apply for the exam
3	Examination	Exam history	NA	Dashboard	User will view its exam history
4	Examination	Admit Letter	NA	Admit letter	User will able to download admit letter.
5	Examination	Transaction	NA	Dashboard	User will view candidates transaction details
6	Accounts	Payment Transaction Query	NA	Form	User will enter membership no. and Transaction no. So, that Candidate can view transaction related information here and view where transaction has been stuck.
7	Examination	Edit	NA	Form	User can edit their form.
8	Examination	Change Password	NA	Form	User can change their password as per their requirement



9	Examination	Duplicate ID Application	NA	Form	User will view its Basic details (Membership no. , Name, Bank/Institute Name, Date of Birth, Mobile, Email, Fee, Photo and Sign) User will select the reason of the Duplicate Id Card application
10	Examination	Renewal		Form	An ordinary membership can apply for renewal of membership.



Annexure – V (Part – C)

Existing Functional modules of Back-End Systems

Module name	Menu Name	Menu Type	Menu Desc
Membership	Designation	MASTER	Creates new Designation
Membership	Tax	MASTER	Creates new Tax for FY
Membership	Financial Year	MASTER	Creates new Financial Year
Membership	State	MASTER	Creates new State
Membership	Pick List	MASTER	Creates new Pick List
Membership	Debar	MASTER	Creates new Debar code
Membership	Bank	MASTER	Creates new Bank
Membership	Qualification	MASTER	Creates new Qualification
Membership	Category	MASTER	Creates new Category
Membership	Fees	MASTER	Creates new Fee for institutional subscription and members registration
Membership	Service	MASTER	Creates new Services
Membership	Individual Member	TRANSACTION	Creates new Individual Ordinary/Associate/Fellow Members
Membership	Institute	TRANSACTION	Creates new Institute
Membership	Institute Debar/Terminate	TRANSACTION	Debar/Terminate the Institute
Membership	Invoice Generation	TRANSACTION	Institute Renewal Invoice Generation process
Membership	Member Query	TRANSACTION	Display the entire details of Member
Membership	Invoice Payment	TRANSACTION	Institute Renewal Invoice Payment process
Membership	Institute Query	TRANSACTION	Display the entire details of Institute
Membership	Credit Note Print	TRANSACTION	Prints the Credit Note
Membership	Staff Strength	TRANSACTION	Creates Staff Strength of institute for FY
Membership	Member Debar/Termination	TRANSACTION	Debar/Termination of Member
Membership	Merge Institute	TRANSACTION	Merger Institute
Membership	Financial Year Closing	TRANSACTION	Financial Year Closing activates to generate the master auto
Membership	NM/DB Member Edit	TRANSACTION	Allow modifying the details of NM/DB Member
Membership	Arrears Invoice Generation	TRANSACTION	Generates Arrears Invoice of institute for more than 1 year
Membership	Member Completing Year	TRANSACTION	Entry for Member Completing Years
Membership	Credit Note Generation	TRANSACTION	Generate Credit Note against invoice



Membership	Bulk Mail Send	TRANSACTION	Provision to sent Bulk Mail to institute
Membership	Member Linkage Maker	TRANSACTION	Ordinary and NM Member Linkage Maker
Membership	Member Linkage Approver	TRANSACTION	Ordinary and NM Member Linkage Approver
Membership	Credit Note Report	REPORT	Generate report of Credit Note
Membership	Recovery Letter	REPORT	Generate report of details of Recovery from institute
Membership	Remittance Report	REPORT	Generate report of transactions that paid and needs to be paid of institute
Membership	Debar Member Report	REPORT	Generate report of Debarred Members
Membership	Institute Payment Details	REPORT	Generate report of Institute Payment Details for last 3 years
Membership	Annual Report	REPORT	Generate report of Institute and members for CFY
Membership	Circular For Institute Member	REPORT	Generate Circular letter For Institute Member
Membership	List Member Report	REPORT	Generate List of Members
Membership	Recovery Register	REPORT	Generate Recovery Register
Membership	Enrolment Report	REPORT	Generate Enrolment details
Membership	Download Photo Sign Id	REPORT	Download Photo, Sign, Id , contact details, communication details
Membership	Benchmark Disability	REPORT	Generate report of Benchmark Disability members
Membership	Member Completing Year Report	REPORT	Generate report for Member Completing Years
Membership	Active-Inactive Institute Detail report	REPORT	Generate list of Active-Inactive Institute
Membership	Institutional Subscription Report	REPORT	Generate Institutional Subscription details
Membership	Amount Received against Institutional Subscription Report	REPORT	Generate details of Amount Received against Institutional Subscription
Membership	Arrears Pending Against Institutional Subscription Report	REPORT	Generate details of Arrears Pending Against Institutional Subscription
Membership	Institute Receipt Report	REPORT	Generate details of Institute Receipt
Membership	New Member Details Report	REPORT	Generate details count of Member
Examination	Examination Master	MASTER	Create New Examination master
Examination	Exam Period Misc. Master	MASTER	Create New Period for Exam



Examination	Subject Master	MASTER	Create New Subject
Examination	Exam Prize Master	MASTER	Create New Exam Prizes
Examination	Exam Prize Master - Auto generation	MASTER	Generate New Exam Prize master From Old FY New FY
Examination	Accredited Institution Master	MASTER	Create New Accredited / BCBF/ DRA institute in Examination Module
Examination	Vendor Master	MASTER	Create New Vendor
Examination	Centre Master	MASTER	Create New Centre
Examination	Centre Exam Master	MASTER	Newly Created Centre Mapped With Exam and Period.
Examination	Exam Fee	MASTER	Create Examination Fees Exam Wise Period wise
Examination	Master Extraction of Application	MASTER	Extract all masters which is Created for a Particular Exam and Period.
Examination	Exam Query	MASTER	View Entire details of member including Registration , examination , invoice , photos, unfair , kyc ...etc
Examination	Subject Linkage Exam	MASTER	Subject Linkage with Exam Period
Examination	Auto Generation of Masters	MASTER	Generate all Master From one period into another period
Examination	Exam Application Validation	MASTER	Exam application validation
Examination	Exam Application Posting	MASTER	Exam Application posting
Examination	DBT Project Work Entry	MASTER	Insert Project Details for DBT exams
Examination	Examination Date	MASTER	Generate Exam dates for RPE exams
Examination	Discount Fee	MASTER	Create/Define the discount against institute
Examination	Medium Exam Master	MASTER	Create Medium for Examinations
Examination	Exam Schedule	MASTER	Create Exam Schedules
Examination	FEDAI Institute Master	MASTER	Create Fedai Institute
Examination	Exemption Form Detail	TRANSACTION	Insert Exception Details for Candidates in Particular Subjects For Some Exams .
Examination	Answer Stub Marks	TRANSACTION	Upload the ANSWER STUB file For examinations.
Examination	Updation Of Marks To History	TRANSACTION	Process the History for exams or Result Processing and generate the summary log
Examination	Credit Transfer Of DBF	TRANSACTION	Insert the details of DBA Passed Candidates Get Credit Transfers For JAIB .
Examination	Extraction Of Admit Card	TRANSACTION	Extract the Admit Card for examination.



Examination	Upload Answer Stub Excel	TRANSACTION	Upload the ANSWER STUB file For examinations via excel
Examination	Exam Application	TRANSACTION	Insert Exam Application Data from Front end .
Examination	History Master Maintenance	TRANSACTION	Modify the examination history details
Examination	List of Eligible Members For Exam	TRANSACTION	Extract Eligible Member Data for Examination.
Examination	Entry Of Answer Stub Data	TRANSACTION	Modify the ANSWER STUB details
Examination	Centre Bill Transaction New	TRANSACTION	Create the Centre Bill Entry.
Examination	Approval (Recommender)	TRANSACTION	Centre Bill Recommender
Examination	Approval (Approver)	TRANSACTION	Centre Bill Approver
Examination	Approval (Account Officer Approver)	TRANSACTION	Centre Bill Accounts Approver
Examination	Result Downloading	TRANSACTION	Download the result data
Examination	Credit Note Generation	TRANSACTION	Generate the credit note
Examination	Eligible Candidates for Online Payment	TRANSACTION	Extract the Eligible Candidates for Online Payment
Examination	List Of Eligible Candidates For E-Learning	TRANSACTION	Extract the Eligible Candidates For E-Learning
Examination	Center Bill Status	REPORT	Generate Centre Bill Status Report
Examination	Eligible Candidate Email List for Vendors	TRANSACTION	Generate Email List for Vendor
Examination	Prize Generation	TRANSACTION	Prize Generation Process
Examination	Re-Enrolment data transfer	TRANSACTION	Process re-enrolment for exam
Examination	Re-Enrolment data reversal	TRANSACTION	Process to reverse the process re-enrolment for exam
Examination	Accredited Application Validation	TRANSACTION	Accredited Institute Application Validation
Examination	Accredited Application Posting	TRANSACTION	Accredited Institute Application Posting
Examination	Process Certificate	TRANSACTION	Certificate Generation process
Examination	Duplicate Cert Validation	TRANSACTION	Duplicate Certificate Application Validation
Examination	Duplicate Cert Posting	TRANSACTION	Duplicate Certificate Application Posting
Examination	Process Certificate Excel	TRANSACTION	Certificate Generation process with help of excel
Examination	Process Certificate Report	REPORT	Process Certificate Report



Examination	Certificate Tracking Uploading	TRANSACTION	Uploading details of Certificate Tracking
Examination	Certificate Tracking Updation	TRANSACTION	Updating details of Certificate Tracking
Examination	Eligible Data of CISI	TRANSACTION	Extract the eligible data for CISI examination.
Examination	Application Validity Updation	TRANSACTION	Update the validity date of exam application
Examination	Sent Mail after History Updation	TRANSACTION	Email sent facility after history processing
Examination	Updation of Member Name in Certificate (Maker)	TRANSACTION	Updation of member name in certificate maker
Examination	Updation of Member Name in Certificate (Approver)	TRANSACTION	Updation of member name in certificate approver
Examination	Upload Venue Master	TRANSACTION	Upload Venue Master
Examination	DBF to JAIB Conversion	TRANSACTION	Convert the DBF to JAIB
Examination	Supervision Approver	TRANSACTION	Approver approves the Supervision claim details
Examination	Supervision Account Approver	TRANSACTION	Account Approver approves the Supervision claim details
Examination	Application and Admit Card Summary Report	REPORT	Application and Admit Card Summary of validation and posting
Examination	Level 2 extraction	REPORT	Extract the members eligible for training-Level 2
Examination	Members Completed Exam	REPORT	Display the list of Members Completed Exam
Examination	Result Statistics	REPORT	Generate the Statistics of result data
Examination	Application Invoice Tally	REPORT	Application and Invoice Summary of validation and posting
Examination	Pre Result Statistics	REPORT	Generate the Statistics of result data before processing result
Examination	Choice Of Electives CAIB Report	REPORT	Display count of Electives CAIB made by members
Examination	Rejected Application List	REPORT	Display the rejected application list
Examination	Percentage of can app and pass the examination	REPORT	Report generates percentage of candidate appeared and passed the examination
Examination	Centre Bill Sent To Acc	REPORT	Report of Centre Bill details to Sent Accounts department
Examination	Centre Bill Payment	REPORT	Report generates percentage of candidate appeared and passed the examination



Examination	Candidate details for Diploma & Certificate Exam	REPORT	Report generates count of candidate appeared, failed and passed the examination details for Diploma & Certificate Exam
Examination	Candidate details flagship/associate exam	REPORT	Report generates count of candidate appeared, failed and passed the examination details for flagship/associate Exam
Examination	Candidate details of Associate and Diploma Exam	REPORT	Report generates count of candidate appeared, failed and passed the examination details for diploma/associate Exam
Examination	Centre-wise Candidates Details	REPORT	Report generate Centre-wise Candidates Details
Examination	Examination Result Declared between period	REPORT	Report generate details of Examination Result Declared between period
Examination	Exam Places in India & Abroad	REPORT	Report generates centre of Exam Places in India & Abroad
Examination	Bill Desk Reconciliation Report	REPORT	Report for Bill Desk Reconciliation against application and invoice
Examination	Comparative Percentage of Passes Report	REPORT	Report generates Comparative Percentage of Passes
Examination	Continuing Professional Development(CPD) Report	REPORT	Report generates Continuing Professional Development(CPD) details
Examination	Duplicate Certificate Report	REPORT	Report generates Duplicate Certificate details
Examination	Consolidated Mark sheet	REPORT	Report generates Consolidated Mark sheet of member
Examination	Diploma in Banking Merit List Report	REPORT	Report generates Merit List of Diploma
Examination	Consolidated Marksheet Data	REPORT	Generates Consolidated Marksheet Data to share the vendor
Examination	Centre Bill Payment Excel Report	REPORT	Report generates Centre Bill Payment in Excel
Examination	Prize Generation Report	REPORT	Report generates Prize processed details
Examination	Exam Registration Promotional	REPORT	Report generates Exam Registration Promotional details
Examination	DBT Report	REPORT	Report generates DBT details
Examination	Bank Statistics Report	REPORT	Report generates Bank Statistics for financial year



Examination	Answer Stub and History Summary Report	REPORT	Report generates Answer Stub and History Summary
Examination	Result Statistic Report in Details	REPORT	Report generates Result Statistic in Details
Examination	Annual Budget Report	REPORT	Report generates Annual Budget details of exams
Examination	Photo marksheet/result for DRA	REPORT	Report generates Photo marksheet/result for DRA exam
Examination	Candidate Single Attempt Certificate	REPORT	Report generates Candidate Single Attempt Certificate
Examination	Consolidated Marksheet with 60%	REPORT	Report generates Consolidated Marksheet with 60%
Examination	Refund Report	REPORT	Report generates Refund details of exams
Examination	Contact Class Report	REPORT	Report generates Contact Class details
Examination	Annual Report	REPORT	Report generates details of exams appeared, pass, fail and pass percentage details of exam
Examination	Exam Fees Details	REPORT	Report generates Exam Fees Details of exam appeared in one financial year and payment received in other financial year
Examination	Exam and Subject Wise Report	REPORT	Report generates Exam and Subject Wise member transactional details of result
Examination	Prize Certificate Report	REPORT	Report generates Prize Certificate
Examination	Benchmark Disability	REPORT	Report generates Benchmark Disability details of exam
Examination	NAR Report	REPORT	Report generates NAR exam details
Examination	Chartered Banker & GARP Report	REPORT	Report generates Chartered Banker & GARP exam details
Examination	Exemption List	REPORT	Report generates Exemption List of member who opt exemption
Examination	ELearning Details	REPORT	Report generates ELearning Details
Examination	Exam Schedule Report	REPORT	Report generates Exam Schedule details
Examination	Green Finance Exam Details	REPORT	Report generates Green Finance Exam Details
Examination	Supervision Report	REPORT	Report generates Supervision Report detail
Web Interface	Upload Bill Desk	MASTER	Upload Bill Desk
Web Interface	Accounting Year	MASTER	Create the Accounting Year for validation & posting



Web Interface	Member Data Validation	TRANSACTION	Member Data Validation
Web Interface	Member Data Posting	TRANSACTION	Member Data Posting
Web Interface	Member Data Re-Validation	TRANSACTION	Member Data Re-Validation
Web Interface	Online Admit Card Validation	TRANSACTION	Online Admit Card Validation
Web Interface	Online Admit Card Posting	TRANSACTION	Online Admit Card Posting
Web Interface	Webonline Query	TRANSACTION	Display the Webonline details
Web Interface	Summary Report	REPORT	Generate the Summary details of all services
Web Interface	Bill Desk Summary Report	REPORT	Generate Bill Desk details Summary
Web Interface	Exam Summary Report	REPORT	Generate Exam Summary details
Web Interface	IT Invoice Tally	REPORT	Tally all services application with invoices
Web Interface	IT Bill DeskTally	REPORT	Tally all services application with billdesk details
Web Interface	Validation Posting Error Summary Report	REPORT	Generate report of Error after Validation Posting process
Subscription	Subscription Fee Master	MASTER	Create Subscription Fee Master
Subscription	Subscription Data Validation	TRANSACTION	Subscription Data Validation
Subscription	Subscription Data Posting	TRANSACTION	Subscription Data Posting
Subscription	Subscription Form Entry	TRANSACTION	Subscription Form Entry
Subscription	Subscription Report	REPORT	Generate Subscription details
Subscription	Subscription Wrapper Label	REPORT	Generate Subscription address details for sending subscriptions
DBF Promotion	College Or University Master	MASTER	Create new College Or University
DBF Promotion	Student Master	MASTER	Create new Student
DBF Promotion	Upload Master Data	TRANSACTION	Upload Master Data with help of excel, to generate master data
DBF Promotion	College Visit Details	TRANSACTION	Enter College Visit Details
DBF Promotion	College Visit Details Approval	TRANSACTION	Approver approves the College Visit Details
DBF Promotion	Communication To College/University/Student	TRANSACTION	Sent mails for Communication To College/University/Student



Tally Upload	Extract Transaction	TRANSACTION	Extraction of Transaction of all services which will help to upload in Tally S/W
Tally Upload	Manual Invoice Entry	TRANSACTION	Create Manual Invoice Entry
Tally Upload	Upload Form16A	TRANSACTION	Upload Form16A
Tally Upload	Download Transaction	REPORT	Provision to Download extracted Transaction
Tally Upload	GST Report	REPORT	Generate the GST details of all services
Tally Upload	Credit Note Report	REPORT	Generate the Credit Note details of all services
Tally Upload	GST Count Report	REPORT	Generate count of all GST services
Tally Upload	Audit Report	REPORT	Generate GST details in Auditor format
Tally Upload	Exam Fees Details	REPORT	
Tally Upload	Json Generation	REPORT	Generate Json of Invoices which will be uploaded on GST portal
Tally Upload	Upload Signed Json	REPORT	Upload Signed Json details
Tally Upload	Convert Json to Pdf	REPORT	Process to Convert Signed Json details to Pdf of invoices
Tally Upload	Json PDF Download	REPORT	E-invoice Download facility
Tally Upload	Json PDF Download - Bulk	REPORT	Download E-invoice in Bulk
Tally Upload	JSON PDF Mail Status	REPORT	Sent mail of E-invoices in Bulk
Tally Upload	Download Form16A	REPORT	Download Form16A
E-certificate	Preview Template	MASTER	A preview of templet uploaded by exam code form
E-certificate	Template Upload	MASTER	Uploading template for certificate by particular exam code
E-certificate	Generation	TRANSACTION	A new certificate generation form
E-certificate	Recommender 1	TRANSACTION	New generated certificate recommender 1 form
E-certificate	Recommender 2	TRANSACTION	New generated certificate recommender 2 form
E-certificate	Approver 1	TRANSACTION	New generated certificate approver 1 form
E-certificate	Approver 2	TRANSACTION	New generated certificate approver 2 form
E-certificate	Approver 2(Both R2 and A1 Listing)	TRANSACTION	New generated certificate approver 2 form of R2 and A1 status
E-certificate	List of D-Certificate available for D-signing	TRANSACTION	List of certificate available for digital sign after A2 level
E-certificate	Complete Digital-signing Process	TRANSACTION	New certificate Digital signing process form



E-certificate	Bulk Email	TRANSACTION	Send new certificates in bulk by exam code, exam period, from certificate no, to certificate no
E-certificate	Certificate Revoke	TRANSACTION	Form to revoke digital signed certificate to recommender lever
E-certificate	Candidate Query	TRANSACTION	A form to search certificate details of candidate
E-certificate	Re-Generation	TRANSACTION	A form to regenerate revoke certificate
E-certificate	Generation	TRANSACTION	Duplicate certificate form generation
E-certificate	Recommender 1	TRANSACTION	Duplicate certificate recommender 1 form
E-certificate	Recommender 2	TRANSACTION	Duplicate certificate recommender 2 form
E-certificate	Approver 1	TRANSACTION	Duplicate certificate approver 1 form
E-certificate	Approver 2	TRANSACTION	Duplicate certificate approver 2 form
E-certificate	Complete Digital-signing Process	TRANSACTION	Duplicate Digital signing process form
E-certificate	Bulk Email	TRANSACTION	Send duplicate certificates in bulk by exam code, exam period, from certificate no, to certificate no
E-certificate	Dashboard	TRANSACTION	Dashboard to view Digital Certificate Details
E-certificate	DCert Detail Report	REPORT	DCert Detail Report
E-certificate	Extraction	REPORT	Provision to Extraction E-certificate
E-certificate	Digital Certificate Information Report	REPORT	Generate the details of Digital Certificate data
E-certificate	Certificate Download	REPORT	Provision to download E-certificate state wise
E-certificate	DCert Process Statistics Report	REPORT	E-certificate Process Statistics Report
E-certificate	Register Entry Form	REPORT	Create new Register Entry
E-certificate	Register Entry Form Edit	REPORT	Modify the Register Entry
E-certificate	DCert Register Report	REPORT	Generate the E-certificate Register Report
User Management	Role Master	MASTER	Crete new Role
User Management	User Master	MASTER	Crete new User which will be user to access the entire all module of IIBF
User Management	User Role Mapping	MASTER	Linkage process of User and Role



User Management	Role Menu Mapping	MASTER	Linkage process of Menu and Role
User Management	Change Password	MASTER	Provision to Change Password of user
User Management	Menu Master	MASTER	Create new Menu of module
Training	Program	MASTER	Create new Program
Training	Topic	MASTER	Create new Topic
Training	Session	MASTER	Create new Session timing
Training	Company/Institute	MASTER	Create new Company/Institute
Training	Conveyance	MASTER	Create new Conveyance
Training	Fee	MASTER	Create new Faculty Fee
Training	Faculty	MASTER	Create new Faculty
Training	Program Batch Link	MASTER	Create new Batch
Training	Faculty Attendance Payment Maker Form	TRANSACTION	Create Faculty Attendance Payment Entry
Training	Participant Attendance Form	MASTER	Create Participant Attendance entry
Training	Extraction for Virtual Class	TRANSACTION	Provision to Extract master for Virtual Class
Training	Upload VC Attendance/MCQ Test	TRANSACTION	Provision to Upload VC Attendance/MCQ Test
Training	Training Score Upload	TRANSACTION	Process to post the training result
Training	Extraction for Online Registration	TRANSACTION	Provision to Extract registration data for Online Registration
Training	Application Validation	TRANSACTION	Blended Application Validation
Training	Application Posting	TRANSACTION	Blended Application Posting
Training	Error Revalidation	TRANSACTION	Blended Application Error Revalidation
Training	Attendance/MCQ Delete	TRANSACTION	Provision for deletion of Attendance/MCQ data
Training	Registration	TRANSACTION	Create new candidate Registration entry
Training	Receipt Invoice Link	TRANSACTION	Create new Receipt Invoice of invoice
Training	Batch Session Faculty Link	MASTER	Provision to link Batch Session and Faculty
Training	Participant Feedback Form	TRANSACTION	Create new Participant Feedback entry
Training	Faculty Feedback Form	TRANSACTION	Create new Faculty Feedback entry
Training	Batch Expenses Form	TRANSACTION	Create new Batch Expenses entry
Training	Faculty Payment Recommender Form	TRANSACTION	Provision to Recommend the Faculty Attendance Payment Entry
Training	Faculty Payment Approver Form	TRANSACTION	Provision to Approve the Faculty Attendance Payment Entry



Training	Faculty Payment Account Approver Form	TRANSACTION	Provision to Accounts Approve the Faculty Attendance Payment Entry
Training	Confirmation Payment Approver Form	TRANSACTION	Provision to Confirm Faculty Payment Entry
Training	Upload File	TRANSACTION	Provision to Upload File of Feedback, Registration
Training	Faculty Payment Approved	REPORT	Generate the report of Faculty Payment details
Training	VC Attendance MCQ Test Report	REPORT	Generated the Evaluation and consolidated report of VC Attendance MCQ
Training	Institute Query	REPORT	View all the details of batch
Training	Certificate	REPORT	Generate the Training Certificate
Training	Invoice Receipt	REPORT	Generate the details of Invoice Receipt details after payment
Training	Participant Attendance Sheet	REPORT	Generate the Participant Attendance Sheet
Training	Faculty Attendance Sheet	REPORT	Generate the Faculty Attendance Sheet
Training	Marketing Letter	REPORT	Generate the Marketing Letter to institute
Training	Program Schedule	REPORT	Generate the Program Schedule of batch
Training	Faculty Listing Topic Wise Report	REPORT	Generate the Faculty Listing Topic Wise details
Training	Batch Expenses Report	REPORT	Generate the Batch Expenses Report
Training	Invoices Report	REPORT	Generate the Invoices Report
Training	Registration Report	REPORT	Generate the Registration details
Training	Participant Feedback Report	REPORT	Generate the Participant Feedback Report
Training	Faculty Feedback Report	REPORT	Generate the Faculty Feedback Report
Training	Faculty Payment Approval Report	REPORT	Generate the Faculty Payment details FY wise
Training	Pan wise Payment Detail Report	REPORT	Generate the Pan wise Faculty Payment Details
Training	Download File	REPORT	Provision to Download File
CMS	Complaint Category	MASTER	Complaints category master creation form
CMS	Complaint Sub Category	MASTER	Sub category of category master creation form
CMS	Exam	MASTER	Exam names master creation form for exam type complaints
CMS	Complaint Source	MASTER	Source master creation form of complaints source



CMS	Complaint Status	MASTER	Status master creation form of complaints status
CMS	Complaint User Mapping	MASTER	Mapping complaints to user by complaints category wise
CMS	Complaint Email Parameter	MASTER	Complaints send/receive email id, password configuration form
CMS	Email Template	MASTER	Complaints reply matter template creation form
CMS	Escalation Email	MASTER	Escalated complaints information receivers email id configuration form
CMS	Bulk Reply (Complaint Mgmt)	TRANSACTION	Complaints added to bulk reply appear in this form for bulk reply
CMS	End Of Day Process	TRANSACTION	Solution Offered status complaints closing form
CMS	Retrieve Email	TRANSACTION	Triggering email complaints retrieving process manually using this form
CMS	Complaint Query	TRANSACTION	Search complaints by complaint id,member/registration no.,name,mobile no.,email id,source,status
CMS	Complaint Management	TRANSACTION	Providing reply or solution to complaints appearing based of complaints to user mapping
CMS	Complaint Entry Form	TRANSACTION	Manual complaint entry/creation form
CMS	Complaint Management(Email)	TRANSACTION	Email complaints sorting like assigning category and subcategory form
CMS	Complaint Release Management	TRANSACTION	Releasing complaint to make it again visible for complaints attendant
CMS	Complaint Management (Email) - with Delete	TRANSACTION	Deleting junk or repetitive or unnecessary email complaints
CMS	Retrieve Webonline Complaints	TRANSACTION	Triggering portal complaints retrieving process manually using this form
CMS	Force Close Complaints	TRANSACTION	Forcefully closing complaints which are not closed yet
CMS	Bulk Reply (Compose Email)	TRANSACTION	Email Complaints added to bulk reply appear in this form for bulk reply
CMS	Bulk Reply (Send Email)	TRANSACTION	Triggering bulk reply complaints email manually
CMS	MIS Report - Closed Complaints	REPORT	Report for summary of closed complaints



CMS	FTP Summary	REPORT	Report for summary of complaints forward to third party complaints
CMS	Complaint Summary	REPORT	Complaints courting summary by category, sub category , status
CMS	User Effort Summary	REPORT	Complaint Attendance complaints management performance/effort summary
CMS	MIS Report - Open Complaints	REPORT	Report for summary of open complaints
CMS	MIS REPORT - Attended/Unattended Complaints (Summary)	REPORT	Detailed report of attended/unattended complaints summary
Admin Asset	Department	TRANSACTION	Create new Department
Admin Asset	Category	TRANSACTION	Create new Category of Asset
Admin Asset	Sub-Category	TRANSACTION	Create new Sub-Category of Asset
Admin Asset	Asset	TRANSACTION	Create new Asset
Admin Asset	Asset Department Linkage Upload	TRANSACTION	Linkage of Asset and Department
Admin Asset	Asset Vendor Master	TRANSACTION	Create new Asset Vendor Master
Admin Asset	Asset Details Report	REPORT	Generate report of Asset Details
UTS	Query	TRANSACTION	View all the details of Tickets
UTS	Ticket Assigning	TRANSACTION	Process to Assign Ticket
UTS	Ticket Accept Reject	TRANSACTION	Process to Accept or Reject Ticket
UTS	Ticket Closing	TRANSACTION	Process to close the Ticket
UTS	Ticket Management	TRANSACTION	Process where Ticket is worked and solution is offered
UTS	Raise Ticket	TRANSACTION	Create new Ticket
UTS	Summary	REPORT	Generate the Tickets Summary details
UTS	Ticket Status Report	REPORT	Generate Ticket Status Report
UTS	Module Menu Wise Report	REPORT	Generate ticket details with Module Menu Wise
Backend Approval	Backend Request(Maker)	TRANSACTION	Create Backend Request for any changes to be done from backend
Backend Approval	Backend Request(Checker)	TRANSACTION	Provision of Checker of Backend Request
Backend Approval	Backend Request(IT)	TRANSACTION	Provision of IT Checker of Backend Request to proceed for updation
Bank Reconciliation	Upload Data	TRANSACTION	Upload Data of GST , Creditnote ,Bank and Refunds
Bank Reconciliation	Auto Reconciliation	TRANSACTION	Process of Reconciliation of transactions
Bank Reconciliation	Force Matching	TRANSACTION	Process of Force Matching of transactions



Bank Reconciliation	Reversal Reconciliation	TRANSACTION	Process of Reversal Reconciliation o reconciliation transactions
Bank Reconciliation	Bank Reconciliation	REPORT	Generate details of Reconciliation details
Bank Reconciliation	Difference In Amount	REPORT	Generate the transactions that are not Reconciliation due to Difference In Amount
Unfair	Upload And Validate Unfair Data	TRANSACTION	provision to Upload And Validate Unfair Data
Unfair	Show Cause Letter Generation	TRANSACTION	Provision to generate the Show Cause Letter against unfair charges
Unfair	Edit Show Cause Details	TRANSACTION	Provision to Edit Show Cause Details
Unfair	Showcase Letter Approver	TRANSACTION	Approves the Show cause Letter generated
Unfair	Candidate Reply Observation	TRANSACTION	Provision to enter the Candidate Reply Observation against the show cause letter
Unfair	Delete Show cause Generated Letter	TRANSACTION	Provision to Delete Show cause Generated Letter
Unfair	Upload Signed Hard Copy	TRANSACTION	Provision to Upload Signed Hard Copy of letters
Unfair	Reminder Email	TRANSACTION	Provision to trigger the Reminder Email
Unfair	Download Letters	TRANSACTION	Provision to Download Letters generated
Unfair	Charges Updation	TRANSACTION	Provision to apply the Charges against show cause letter
Unfair	Charges Updation Approver	TRANSACTION	Approves the Charges applied against the show cause letter
Unfair	Committee Note	REPORT	Generate the Committee Note against unfair
Unfair	Statement	REPORT	Generate Statement of unfair details
Unfair	Status Report	REPORT	Generate Status Report of unfair details
Unfair	Print Show cause Details Letter	REPORT	provision to Print Show cause Details Letter
Result Analysis	Upload Data	TRANSACTION	Provision to Upload Data Answer key and response data
Result Analysis	Response Analysis	TRANSACTION	Process of Response Analysis
Result Analysis	Analysis Report	REPORT	Generate the Analysis Report
Result Analysis	CRR Analysis Report	REPORT	CRR Analysis Report



Request for proposal (RFP) for design, development of new website, portal and back-end systems & migration of existing data, content of website and hosting & maintaining it in a cloud environment on a turnkey basis

Result Analysis	File Upload Details	REPORT	Generate details of File Uploaded
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Annexure-VI(Part – A)

I.Current Infrastructure details of Website and Transactional Portal (DC)

Private Cloud - Data Center Site				
Env.	Description			
A.1	Cloud Instances	Unit	Application Name	Status
VM-1	vCores: 24 RAM: 188 GB Performance Storage (3000 IOPs/TB): 872 GB OS: CentOS Linux release 7.9.2009 (Core) DB: Microsoft SQL Server 2012 (SP3)	1 No.	database1	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-2	vCores: 24 RAM: 188 GB Performance Storage (3000 IOPs/TB): 872 GB OS: CentOS Linux release 7.9.2009 (Core) DB: Microsoft SQL Server 2012 (SP3)	1 No.	database2	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-3	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	Portal app	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-4	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 1.6 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	Portal app2	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-5	vCores: 4 RAM: 16 GB Performance Storage (3000 IOPs/TB): 292 GB OS: Windows Server R2 DB: MySql (5.7.44)	1 No.	Website DB	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-6	vCores: 16 RAM: 16 GB Performance Storage (3000 IOPs/TB): 279 GB OS: Windows 2012 R2	1 No.	Web app	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-7	vCores: 24 RAM: 46 GB Performance Storage (3000 IOPs/TB): 122 GB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	Internal Server	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-8	vCores: 24 RAM: 46 GB Performance Storage (3000 IOPs/TB): 122 GB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	Internal Server	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-9	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS: Windows 2012 R2	1 No.	Internal Server	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.



VM-10	vCores: 18 RAM: 24 GB Performance Storage (3000 IOPs/TB): 1.3 GB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	Internal Server	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-11	vCores: 4 RAM: 15 GB Performance Storage (3000 IOPs/TB): 279 GB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	Internal Server	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-12	vCores: 4 RAM: 8 GB Performance Storage (3000 IOPs/TB): 250 GB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	Internal Server	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-13	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-14	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-15	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-16	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-17	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-18	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-19	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-20	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-21	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.



VM-22	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-23	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-24	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-25	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-26	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-27	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-28	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-29	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-30	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-31	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-32	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	N/A	This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
A.2	Backup & Storage	Unit		
Storage	Backup Storage	5 TB		Provisioned



Storage	Additional Storage	3 TB		Provisioned
A.3	Software Licenses - SPLA model	Unit		
OS	Windows Standard 2019	3 No.		Provisioned but windows server Std 2012 Edition
OS	Centos	29 No.		Provisioned
DB	MySQL Community Server 2012 (SP3)	1 No.		Provisioned
DB	MSSQL STD (5.7.44)	4 No.		Provisioned
Backup	Backup Agent	32 No.		Provisioned
Control Panel	Plesk- Web Admin Panel (Upto 10 Domain)	1 No.		Provisioned
A.4	Security	Unit		
Security	vFirewall with 1Gbps Throughput	2 No.		provisioned
	AV+HIPS	32 No.		provisioned
	DDoS Mitigation as a Service -1 Gbps Mitigation	1 No.		provisioned
	VAPT Audit-Cert In	2 No.		provisioned
	SMS Gateway - SMS Service	20000 0 No.		provisioned
	Vulnerability Threat Monitoring - 4 Scan	1 No.		provisioned
	Application performance Monitoring	29 No.		provisioned
	Database Monitoring	3 No.		provisioned
A.5	network	Unit		
Networki ng Services	Internet Bandwidth - Speed Based	50 Mbps		Provision
	Load Balancer- 1 Gbps Throughput	2 No.		Provision
	Public IP's	10 No.		Provision
A.6	Managed Hosting Services	Unit		
	One Time Infrastructure setup	1 Job		Provision



Managed Services	Operating System Management Services	32 Inst.		Provision
	Storage Management Services - Per TB	1 No.		Provision
	Database Management Services- Per- Instance - Upto 100GB	3 Inst.		Provision
	Backup Management Services	32 No.		Provision
	WAF Management Services	1 No.		not provision
	vLoad balancer Management Services	2 No.		Provision
	Firewall Management Services	2 No.		Provision
	Infra Management	1 No.		Provision
	Advanced Infra Monitoring for Infra	32 No.		Provision

II.Current Infrastructure details of Website and Transactional Portal (DR)

Private Cloud - Data Center Site				
Env.	Description			
A.1	Cloud Instances	Unit	Application Name	Status
VM-1	vCores: 24 RAM: 188 GB Performance Storage (3000 IOPs/TB): 872 GB OS: CentOS Linux release 7.9.2009 (Core) DB: Microsoft SQL Server 2012 (SP3)	1 No.	database1	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-2	vCores: 24 RAM: 94 GB Performance Storage (3000 IOPs/TB): 5.2 TB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	Web app	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-3	vCores: 18 RAM: 24 GB Performance Storage (3000 IOPs/TB): 1.3 GB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	Internal Server	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.



VM-4	vCores: 4 RAM: 15 GB Performance Storage (3000 IOPs/TB): 279 GB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	Internal Server	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-5	vCores: 4 RAM: 8 GB Performance Storage (3000 IOPs/TB): 250 GB OS: CentOS Linux release 7.9.2009 (Core)	1 No.	Internal Server	Provisioned. This is a basic configuration and upgrades happen based on the monitoring observation.
VM-6	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS: Windows 2012 R2	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-7	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS: CentOS Linux release 7.9.2010	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-8	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS: CentOS Linux release 7.9.2011	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-9	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS: CentOS Linux release 7.9.2012	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-10	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS: CentOS Linux release 7.9.2013	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.



VM-11	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2014	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-12	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2015	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-13	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2016	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-14	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2017	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-15	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2018	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-16	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2019	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-17	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2020	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.



VM-18	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2021	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-19	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2022	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-20	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2023	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-21	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2024	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-22	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2025	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-23	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2026	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-24	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2027	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.



VM-25	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2028	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-26	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2029	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-27	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2030	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-28	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2031	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-29	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2032	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-30	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2033	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
VM-31	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2034	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.



VM-32	vCores: 24 RAM: 64 GB Performance Storage (3000 IOPs/TB): 299 GB OS:CentOS Linux release 7.9.2035	1 No.		This gets added based on the traffic expected hence monitoring 24*7 and resources are amended accordingly.
A.2	Backup & Storage	Unit		
Storage	Additional Storage	5 TB		
A.3	Software Licenses - SPLA model	Unit		
OS	Windows Standard 2019	1no.		Provisioned but windows server Std 2012 Edition
OS	Centos	32 No.		Provisioned
DB	MySQL Community	1 No.		provisioned
DB	MSSQL STD	0 No.		Not provisioned
DRM	DRM software	29 No.		provisioned
CP	Plesk- Web Admin Panel (Upto 10 Domain)	1 No.		provisioned
A.4	Security	Unit		
Security	vFirewall with 1Gbps Throughput	1 No.		provisioned
	HIPS	32 No.		provisioned
	DDoS Mitigation as a Service -1 Gbps Mitigation	1 No.		provisioned
	vWAF -1Gbps Throughput	1 No.		not provisioned
	VAPT Audit-Cert In	2 No.		provisioned
	SIEM	32 No.		not opt.
	SMS Gateway - SMS Service	20000 0 No.		provisioned
	Vulnerability Threat Monitoring 4 Scans	1 No.		provisioned



	Application performance Monitoring	31 No.		provisioned
	Database Monitoring System	1 No.		provisioned
A.5	network	Unit		
Network ing Services	Internet Bandwidth - Speed Based	50 Mbps		Provisioned
	Replication Link from Primary DC to DR	20 Mbps		Provisioned
	Load Balancer- 1 Gbps Throughput	1 No.		Provisioned
	Public IP's	10 No.		Provisioned
A.6	Managed Hosting Services	Unit		
Manage d Services	One Time Infrastructure setup	1 Job		Provisioned
	Operating System Management Services	32 No.		Provisioned
	Storage Management Services	1 No.		Provisioned
	Database Management Services- Per- Instance - Upto 100GB	1 No.		Provisioned
	DR Drills (Twice a Year)	2 No.		Provisioned
	Replication Link Management	1 No.		Provisioned
	Replication Monitoring	32 No.		Provisioned
	WAF Management Services	0 no.		Not Provisioned
	vLoad balancer Management Services	1 No.		Provisioned
	Firewall Management Services	1 No.		Provisioned
	Infra Management	1 No.		Provisioned
	Advanced Infra Monitoring for Infra	32 No.		Provisioned



Annexure-VI(Part – B)

I.Current Infrastructure details of Back-End Systems(DC).

Private Cloud - Data Center Site			
Env.	Description		
A.1	Cloud Instances	Unit	Application Name
VM-1	vCores 8 RAM 48 GB Performance Disk (300 IOPs/TB) 600 GB OS : CentOS Linux release 7.9.2009 (Core)	1 NO	App + Web Server
VM-2	vCores 8 RAM 72 GB Performance Disk (300 IOPs/TB) 600 GB OS : CentOS Linux release 7.9.2009 (Core) DB : PostgreSQL 9.5	1 NO	DB Server
VM-3	vCores 8 RAM 72 GB Performance Disk (300 IOPs/TB) 600 GB OS : CentOS Linux release 7.9.2009 (Core) DB : PostgreSQL 9.5	1 NO	DB Server
VM-4	vCores 4 RAM 48 GB Performance Disk (300 IOPs/TB) 600 GB OS : CentOS Linux release 7.9.2009 (Core)	1 NO	UAT/Dev - App/Web and DB Server
VM-5	vCores 4 RAM 8 GB Performance Disk (300 IOPs/TB) 200 GB OS : CentOS Linux release 7.9.2009 (Core)	1 NO	NTP/Syslog Server
VM-6	vCores 8 RAM 48 GB Performance Disk (300 IOPs/TB) 600 GB OS : CentOS Linux release 7.9.2009 (Core)	1 NO	E-Certificate application / Database Server
VM-7	vCores 4 RAM 8 GB Performance Disk (300 IOPs/TB) 600 GB OS : CentOS Linux release 7.9.2009 (Core)	1 NO	Interface Server
VM - 8	vCores 4 RAM 8 GB Performance Disk (300 IOPs/TB) 600 GB OS : Windows 2012 R2	1 NO	AD
VM - 9	vCores 4 RAM 8 GB Performance Disk (300 IOPs/TB) 600 GB OS : CentOS Linux release 7.9.2009 (Core)	1 NO	Linux
VM - 10	vCores 4 RAM 8 GB Performance Disk (300 IOPs/TB) 600 GB OS : CentOS Linux release 7.9.2009 (Core)	1 NO	Linux
VM- 11	vCores 4 RAM 8 GB Performance Disk (300 IOPs/TB) 600 GB OS : Windows 2012 R2	1 NO	tally
VM- 12	vCores 4 RAM 8 GB Performance Disk (300 IOPs/TB) 600 GB OS : CentOS Linux release 7.9.2009 (Core)	1 NO	NFS
A.2	Backup & Storage	Unit	



Storage	Enterprise Storage Space - (300 IOPS/TB)	1 TB	
Backup	Backup Storage Space - with Backup Software	1 TB	
A.3	Software Licenses - SPLA model	Unit	
OS	Windows Server R2 2012	2 No.	
OS	CentOS 7.0	10 No.	
DB Server	PostgreSQL 9.5	2 No.	
A.4	Network and Security	Unit	
Services	vFirewall	1 NO	
Services	Cross Connect - (MPLS/P2P Link)	1 NO	
Services	Port Termination - (MPLS/P2P Link)	1 NO	
Services	VPN Users (for 10 Users)	10 NO	
Services	Unmetered Internet Bandwidth	2 Mbps	
Services	Public IPs	1 NO	
A.5	Managed Hosting Services	Unit	
Services	Operating System Management Services	2 No.	
Services	Postgres/Mysql/MSSQL Database Administration (DB)	2 No.	
Services	Application Management	12 No.	
Services	Storage Management	12 No.	
Services	vFirewall Management Services	1 No.	
Services	Backup Management	12 No.	
Services	eMagic Advanced Monitoring for VMs, Ports & Firewall	12 No.	
Services	Standard Support for above Mentioned services via Chat, Phone, Ticket	1 No.	
	Advanced Infra Monitoring for Infra	12 No.	



II.Current Infrastructure details of Back-End Systems(DR).

Private Cloud - Data Center Site			
Env.	Description		
A.1	Cloud Instances	Unit	Application Name
App/ Web Server	vCores 6 RAM 48 GB Performance Disk (300 IOPs/TB) 600 GB OS : CentOS Linux release 7.9.2009 (Core)	1 NO	App/ Web Server
DB Server	vCores 6 RAM 72 GB Performance Disk (300 IOPs/TB) 600 GB OS : CentOS Linux release 7.9.2009 (Core) DB : PostgreSQL 9.5	1 NO	DB Server
A.2	Backup & Storage	Unit	
Storage	Backup Storage	5 TB	
Storage	Additional Storage	3 TB	
A.3	Software Licenses - SPLA model	Unit	
OS	CentOS 7.0	1 No.	
DB Server	PostgreSQL 9.5	1 No.	
A.4	Security	Unit	
Services	vFirewall	1 NO	
Services	Cross Connect - (MPLS/P2P Link)	1 NO	
Services	Port Termination - (MPLS/P2P Link)	1 NO	
Services	Unmetered Internet Bandwidth	2 Mbps	
A.5	network	Unit	
Networking Services	Internet Bandwidth - Speed Based	50 Mbps	
	Load Balancer- 1 Gbps Throughput	1 NO.	
	Public IP's	1 No.	
A.6	Managed Hosting Services	Unit	
Services	Operating System Management Services	2 NO	



Services	Database Management Services	1 NO	
Services	Application Management Services	1 NO	
Services	Storage Management Services	1 NO	
Services	vFirewall Management Services	1 NO	
Services	eMagic Advanced Monitoring for VMs, Ports & Firewall	2 NO	
Services	Replication Management and Monitoring Services	1 NO	
Services	DR Drill (Yearly 2 Drill's)	2 NO	
Services	Standard Support for above Mentioned services via Chat, Phone, Ticket	1 NO	
	Advanced Infra Monitoring for Infra	2 No.	

Note: The above infra details of Website, Portal and Back-end of DC/DR are currently used by the Institute. The bidder has to arrive at appropriate sizing of infra for website, portal and back-end systems in the new environment based on the new application systems developed and deployed.