

Date: 22nd June 2020

Invitation of Expression of Interest (EOI)
From
Software Consultancy Organizations
For Providing
Software Application Development Services
Towards
Enhancement of Existing
trustea Database Management System App
(trustea Code Management System)



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1. Invitation to Expression of Interest (EOI)

1.1 Invitation

trustea has envisaged to put in place a Digital **trustea Code management System** (here-in after call as **trusteaCMS**), covers the entire trustea certification cycle i.e. from certification body and Implementation Partner empanelment to their audit and activities, certification, System assurance audit and trustea secretariat level functionalities and monitoring. This proposed **trusteaCMS** (trusteaDBMS Version 2.0) is also expected to ease the demands of Certification Bodies, Implementation Partners, Certified Entities, Commercial partners and after all trustea administration for better record keeping, following standard operating procedure for every task, direct interaction with the certified entities and robust MIS and dashboard for rapid decision making.

The objective is to put in place an easy to use, secure, integrated information technology system, covering the following stakeholders of the audit cycle:

- i. Certified Entities – Bought Leaf Factories / Estate / Group of Tea producers with Small Growers owning Small Tea Gardens
- ii. Certification Bodies
- iii. Implementation Partners
- iv. Commercial partners of trustea program
- v. Trustea Secretariat

Considering that the system shall be in use in remote areas, with limited human resources having limited computer skillsets and limited infrastructure in terms of internet connectivity, it is expected that the system shall require minimum resources on the users and at the same time ensure that the required data is collected at the point of entry, in a consistent, secure and appropriate manner.

The requirements highlighted above are indicative in nature. The execution of this project requires good understanding of trustea business area and functionalities of Certification bodies in India as well as experience in setting up of IT enabled systems for the same categories.

Through this EOI, TRUSTEA is interested in short listing qualified Information Technology Consultancy Organizations for providing services for Supplying customized Software Application, Maintenance, Operations Support and Management Support for trusteaCMS towards India Sustainable Tea Programme. The interested bidders shall have competent human resources, having domain understanding of trustea / other tea standards as well as the required technical skills and experience in software development, training, implementation, maintenance, management and user technical support.

TRUSTEA invites Expression of Interest (EOI) from Organizations with experience in successfully executing similar projects.

This EOI document indicates the scope of work, qualifying requirements, forms and procedure for submission of proposal by interested Organizations. The short-listed Organizations shall be provided with further opportunities for interaction with TRUSTEA to study and submit a detailed technical and financial proposal for the objectives set forth in this EOI document. The selection of the successful bidder among the short-listed ones shall be based on technical and financial criteria.

TRUSTEA reserves the right to accept or reject any or all the offers at any stage of the process without assigning any reasons thereof and no claim/dispute on this aspect shall be entertained. May please contact the following for more details:

Rajesh Bhuyan, Director, trustea Secretariat,
DBS House, Room 201, 10/2 Hungerford Street,
Kolkata -700017, West Bengal, India
Email: bhuyan@trustea.org

Or

Debasish Dutta, IT Project Manager, trustea Secretariat,
DBS House, Room 202, 10/2 Hungerford Street,
Kolkata -700017, West Bengal, India
Email: dutta@trustea.org

1.2 SELECTION METHOD:

1. TRUSTEA invites Expression of Interest (EOI) only from experienced Software Consultancy Organizations with expertise in Software Development, Customization, Maintenance, Management and User support for IT-enabled systems.
2. TRUSTEA shall short-list only those organizations who fulfill the following criteria:
 - i. The applicant shall be a single entity, registered as a Company, Firm or Society under respective acts in India & should have been in existence in India for the last Five years.
 - ii. The agency must be registered in India with appropriate tax and other administrative authorities.
 - iii. Should have technically qualified and well-experienced strong in-house resource base on company role.
 - iv. The applicant should furnish an undertaking to the effect that the firm has not been black listed in India.
 - v. Documentary Support for last 2 previous years credentials

2. Scope of Work

2.1 Fundamental Requirements in Brief

Web & Mobile Based trusteaCMS for trustea Code Governance and Audit Cycle

1. A Web based trustea Code management system
2. A Mobile based audit evidence capture application (Hybrid OS based), with Online and offline operation facility with Sync feature

2.2 Functional Requirements (Only Indicative)

The functional and technical requirements are available in **Scope of Work Document (Annexure – I)**

3. Instructions to Consultants

3.1 Authorized Signatory

The 'Applicant' mentioned in the EOI document shall mean the one who has signed the EOI document forms. The applicant should be the duly Authorized Representative, for which a certificate of authority should be submitted. All certificates and documents (including any clarifications sought and any subsequent correspondence) received hereby, shall, as far as possible, be furnished and signed by the Authorized Representative.

Every sheet and all forms complete in all respects shall be signed by the person/ persons duly authorized to sign on behalf of the applicants with affixing the applicant's rubber stamp. The Power (s) of Attorney supporting/authorizing of the signatory shall be enclosed with the offer. Any / all corrections made in the offer shall be duly authenticated by the signature of the Authorized Signatory.

3.2 Sealing of Envelopes & Submission

- a) The Expression of Interest is sealed in an envelope super scribing "Expression of Interest – Application Development for Extension of trusteaDBMS" or in case of Email, subject matter should be texted as "Expression of Interest – Application Development for Extension of trusteaDBMS"
- b) This envelope shall be submitted on or before **14th July 2020 to the following officer of Trustea** by Email or Hardcopy:
Rajesh Bhuyan, Director, trustea,
Initiative Development Hub LLP,
DBS House, Room 201, 10/2 Hungerford Street,
Kolkata -700017, West Bengal, India
Email: bhuyan@trustea.org
CC: dutta@trustea.org, shrmajain@trustea.org
- c) TRUSTEA reserves the right to reject any or all the EOIs without assigning any reasons.

3.3 Documents to accompany EOI

The applications shall be complete with the following documents:

A. Technical Bid

1. Letter of Authorization.
2. Expression of Interest in Form – I.
3. Details of experience in Form-II.
4. Legal and statutory documents of organization
5. Company profile and association

B. Financial Bid

1. Budgetary estimate in FORM-III.

The applicant, in addition to furnishing complete information in the Forms appended with the documents, shall furnish a detailed document on proposed approach; methodology & work plan for the assignment. The work plan shall include full justification for procedures to be adopted.

3.4 Amendment to EOI

At any time prior to the last date for receipt of proposals, TRUSTEA, may for any reason, whether at its own initiative or in response to a clarification requested by a prospective applicant, modify the EOI document by an amendment. In order to provide prospective applicants reasonable time in which to take the amendment into account in preparing their proposals,

TRUSTEA may, at its discretion, extend the last date for the receipt of proposals and/or make other changes in the requirements set out in the EOI.

The applicant is required to visit the Notices & Circulars Section of TRUSTEA website for any changes or amendments in the EOI before submitting their Expression of Interests.

3.5 Preliminary examination for the applications

- a) The TRUSTEA shall examine the applications to determine whether they are complete, whether the documents have been signed as indicated in this document, whether all Forms as asked have been filled in properly, whether applications are generally in order and all information as indicated under various clauses have been furnished.
- b) The TRUSTEA reserves the right to waive minor deviations in the proposal application if they do not materially affect the capability of the bidder to perform the assignment.
- c) Prior to detailed evaluation formalities, TRUSTEA shall determine the substantial responsiveness of each application to the Invitation documents. A substantially responsive proposal is one, which conforms to all the terms and conditions of the Invitation document without any material deviation. A material deviation is one, which limits in any way responsibilities and liabilities of the bidder or any right of the employer as required in this document. TRUSTEA may waive any minor non-

conformity in an application, which does not constitute material deviation. Non-responsiveness shall run the risk of rejection.

- d) The evaluation shall be carried out on the basis of data available in the application documents received from the agency in the first instance. No account will be taken of any further documents or clarifications or any such additional information furnished subsequently by the consultant agency. However, TRUSTEA reserves the right to call for such clarifications confined in scope to the contents of the application, should such a clarification become necessary for proper judgment in evaluation.

3.6 Evaluation

The procedure of evaluation of the applications is indicated below:

a) TRUSTEA has specified the Pre-Qualification Criteria in the EOI document with minimum qualifying requirement for each of the criteria. The applicant shall submit the proposals in the same sequence indicating the qualification criteria on each certificate. The Evaluation matrix is attached with EoI as **Annexure - II**

b) TRUSTEA shall apply pass-fail test and short list all the consultants who meet the minimum requirement as specified.

c) After completion of technical evaluation, trustea will evaluate the financial proposal among the qualified bidders for the services desired in the project.

d) The Final Score is on the basis of summation of Technical and Financial score board. The highest scorer will be engaged as IT partner of trustea for this assignment.

3.8 Presentation

As a part of Evaluation of Expression of Interests submitted by the applicants, TRUSTEA may seek further information or a presentation from the Organizations at a short notice for evaluation purposes.

3.9 Pre-Bid Meeting

For details scope of proposed application, trustea may arrange for a pre-bid meeting with all requested participants. The proposed meeting will be informed to participants by mail or will be available in the Notices & Circulars Section of TRUSTEA website.

3.9 Rejection of EOI

The application is liable to be rejected if:

- a. Not in prescribed forms and not containing all required details.
- b. Not properly seal and signed as per requirements.
- c. Received after the expiry of due date and time.
- d. Offer is received by fax, telegram.
- e. Missing of any supporting document(s) with the EOI

3.10 Disclaimer

- a. The TRUSTEA shall not be responsible for any late receipt of applications for any reasons whatsoever. The applications received late will not be considered and returned unopened to the applicant.
- b. The TRUSTEA reserves the right
 - To reject any/all applications without assigning any reasons thereof.
 - To relax or waive any of the conditions stipulated in this document as deemed necessary in the best interest of the TRUSTEA without assigning any reasons thereof.
 - To include any other item in the Scope of work at any time after consultation with applicants or otherwise.

4. Formats for Submission

FORM I EOI Letter Performa

To
trustea Sustainable Tea Foundation

Sub: Expression of Interest for short-listing of Consultancy Organizations for Setting up of Traceability System for TRUSTEA

Sir,

The undersigned having read and examined in detail all the EOI documents pertaining to your assignment; do hereby express the interest to do the work as specified in the scope of work.

S.No	Description	Response
1.	Name of the Consultancy Organization	
2.	Address	
3.	Name, designation & address of the person to whom all references shall be made	
4.	Telephone (with STD code)	
5.	Mobile No. of the contact person	
6.	E-mail of the contact person	

We have enclosed the following documents:

1. Letter of Authorization.
2. Form I should be submitted on the company's letter head duly seal and signed by the authorized person.
3. Details of experience in Form-II with supporting documents
4. Budgetary Estimates in Form-III.
5. Company Profile
6. Photocopy of Legal and statutory Documents of organization
 - a. Trade License / Certificate of Incorporation
 - b. GST Registration Certificate
 - c. PAN / TAN
 - d. Last year IT return document

I/ We hereby declare that my/ our EOI is made in good faith and the information contained is true and correct to the best of my/ our knowledge and belief.

Thanking you,
Yours faithfully,
(Signature of the Applicant)

Name:

Designation:

Seal:

Date: _____

Place _____

**FORM-II
DETAILS OF EXPERIENCE**

A. Customer References related to Projects that the applicant has been engaged during the last two years:

S.No.	Name & Address of The client	Date of start Of the work	Date of Completion	Website Address (if any)	Value of the Project
1.					
2.					
3.					
4.					

Note:

Please also note that the copies of work orders and satisfactory completion certificate from the customers shall be required to be submitted for all the references mentioned above.

**FORM-III
Commercial Estimates (Budgetary)**

S.No.	Component/Activity	Period (Weeks)	Cost (INR)*
1.	Web Application Development, Deployment, Testing & Go-Live		
2.	Mobile Application Development, Deployment, Testing & Go-Live		
3.	Data Migration from old applications		
4.	Post Go-Live free support for 2 Months		
Total (Amount in Words)			

** trustee administration has full right to negotiate with L1 participant on Commercial estimates*

Annexure – I

Scope of Work

Introduction

trusteaDBMS is a database of trustea certified tea producers. The existing database is only accessible from a web application developed by trustea in the year of 2019. Beside the database of certified entities, this application is also used by Certification bodies for Audit Plan submission and approval, monthly report upload from Implementation partners of trustea for their activities.

trustea has envisaged to expand the scope of trustea DBMS application in a robust way to cover all the functionalities of certification, code management, support and core governance of trustea functional cycle.

To achieve such milestone, trustea is going to develop trustea DBMS version 2.0 with proposed application name as "trusteaCMS". trusteaCMS stands for trustea Code Management System. trusteaCMS will cover all the functionalities of trustea Secretariat. The proposed application will conduct good practices of regular functionalities and run on the basis of Standard operation procedure of trustea certification cycle and continues process development.

Benefits

- ✓ Single mode application for all trustea stakeholders
- ✓ Drilled down details of Entities and entity level interface for certification related activities
- ✓ Excellent appeal process for certified entities and Grievance redressal mechanism for all stakeholders
- ✓ Standard Operating System for empanelment of Certification Body and Implementation Partner
- ✓ At-an-access portal for Certification Bodies, Implementation Partner, Commercial partner and Secretariat for all of their activities in trustea life cycle
- ✓ Robust dashboard comprising of tabular and graphical information for trustea stakeholders
- ✓ Easy capture of audit evidence through mobile app.
- ✓ SMS and Email trigger for notification alert.

Indicative Users of Application

- a) Certified Entities
- b) Implementation Partner
- c) Commercial Partners
- d) Trustea Secretariat
- e) Certification Bodies
- f) Auditors
- g) Limited accessibility for Guest users

Application Functionalities

Introductory Flow

- ✓ Post Online application for new request, Scrutiny of submitted request by Secretariat, auto credential for portal (vide trustea protocol book, Part-1, clause 2.2) *(Enhancing the Existing features)*.
- ✓ Online empanelment procedure of Certification Bodies (CB)
- ✓ Online empanelment procedure of Implementation Partner (IP)

Certified Entities

- I. External and Internal Audit accessibility and management
- II. Certification Body engagement – Selection and engagement of Certification Body
- III. Verification Certificate Scope and Audit Extension – Application for extension of Certificate scope, Certification period extension and Audit plan extension request etc.
- IV. Appeal Desk – Appeal to CB, IP, trustea secretariat or any other trustea certification stakeholders.
- V. Robust MIS and report regarding certification history and code performance – Graphical and Tabular reports regarding year wise performance in sustainability code of trustea and monitoring of the continuous improvement. Facility for view and download of all previous verification certificates. PDF formatted downloadable reports.
- VI. Direct accessibility of trustea E-Learning and traceability portal – facility to directly go to the trustea E-Learning portal and traceability application.

Certification Bodies

- I. Auditor Creation, Audit Team management and Audit allocation
- II. Auditor creation and audit allocation – Auditor creation, allocation for audit *(Incorporation of Audit Portal features)*.
- III. Auditor activity management – Entity wise auditors activities monitoring and evaluation system *(Incorporation of Audit Portal features and its extension)*.
- IV. Verification of submitted audit report and completion notes – This section is for verification of submitted audit reports by auditors with evidences and submission to trustea secretariat for further process *(Incorporation of Audit Portal features and its extension)*.
- V. Online Verification Certificate generation with digital signature – System generated Verification certificate, portable downloadable format and embedment of digital signature of certifying authority for secure and genuine certification process *(Extension of the existing application feature)*.
- VI. Application for Sanctions (Decertification / Suspension / Warning etc.) – Application to trustea secretariat for decertification and suspension of entities for approval or necessary action, soft linked transaction with trustea in these matters.
- VII. System Assurance Audit as per trustea guideline – SAA audit planning, auditing, audit report submission and necessary interaction with trustea and entities for further action.
- VIII. Robust MIS, Reporting and dashboard for Single view decision - Graphical and Tabular reports regarding year and entity wise performance in sustainability code of trustea and monitoring the activities of certification cycle. Facility for view and download of various reports in PDF and excel format.

Implementation Partner

- I. [Team building and Monthly activities management](#) – Manpower allocation, Entity wise handhold support report submission with proper evidence and recording of other necessary activities.
- II. [GAP audit report submission](#) – Details GAP audit report submission in portal and day by day update of report as per the compliance of code by entities.
- III. [Robust MIS, Reporting and dashboard for Single view decision](#) - Graphical and Tabular reports regarding year and entity wise activities in sustainability code implementation. Facility for view and download of various reports in PDF and excel format.

trustea Secretariat

- I. [Entire Control of Audit Cycle – Audit Report checking and trail communication](#) - Audit Plan approval and year and entity wise audit activities, reports monitoring. Audit report checking, clarification management, CB level communication, approval or hold-on signal to CB for verification certificate generation and any other audit / certification related activities. Activities will be time bound process and auto email; auto notification and auto alert / SMS will be generated as and when require (*Incorporation of Audit Portal features and its extension*)
- II. [Sanction Management \(Warning, Suspension, Cancellation\)](#)
- III. [V.C scope and Audit Extension management](#)
- IV. [Exceptional case handling mechanism](#) – Overall extension of audit period or change of process flow etc.
- V. [Sanction management](#) – Warning, suspension and cancellation of certification.
- VI. [System assurance audit management](#) – Year wise SAA Figure determination, Filtration of year wise entities, SAA allocation – trustea and CB, SAA report preparation, SAA audit data analysis, notification to stakeholders etc.
- VII. [Grievance Management](#) – Management, communication and action for the appealed matters from stakeholders. The section is time bounded with alert system.
- VIII. [CB and IP Evaluation](#) – Performance Evaluation of CB and IP.
- IX. [Robust MIS, Reporting and dashboard for Single view decision](#) - Graphical and Tabular reports regarding year and entity wise activities in sustainability code implementation, Auto monthly tracker generation. Analytical Reports for rational, administrative and retrospective decision making. Facility for view and download of various reports in PDF and excel format.
- X. [Role management](#) – User creation, modification and role assignment / revocation.
- XI. [Monthly Operation Meeting Setup and management](#) – Meeting Plan, Agenda posting, minutes listing and MoM circulation from system in a specified format.
- XII. [CB and IP enrolment management](#)

Auditor

- I. [Upload Audit Report and audit completion report](#) – As like as existing audit portal or better way (*Incorporation of Audit Portal features and its extension*).
- II. [MIS, Reporting and dashboard for Single view decision](#) – Auditor wise Audit report and performance will be in dashboard in Tabular and graphical mode. Facility for view and download of various reports in PDF and excel format.

Commercial Partner

- I. Entity performance in sustainability code / Year wise continues improvement graph
- II. Customized Report generation for instant decision making (incorporation of Seagate Crystal Report 14.2 SP 27)

Common features for all Users

- I. Auto notification and E-mail – Pre setup trigger for time bound activities
- II. Alert mechanism – Alert notification for time bound and new activities.
- III. Auto SMS float for Certification life cycle – Audit and Certification related communication to Entities, IP and CB. The formats and text matters will be finalized during development hours.
- IV. Incorporation of Service delivery framework with auto functionalities / cron job.

** All the features of this application will be as per the updated trustea protocol book and its subsequent revised notification. All the above-mentioned activities are from web-based platform only.*

Mobile User – Auditors

- i. Auditors in the field level will be the only mobile app users
- ii. Auditors can capture the evidence of audit clause for particular audit ID only.
- iii. The session of capturing evidence for a particular audit ID should be valid within proposed audit timeline.
- iv. Facility for Offline capturing though mechanism will be started after online credential verification.
- v. Auto sync facility of captured data
- vi. Linking with the CB and trustea reports.

Important Notes:

1. The mentioned scope of services is the overview and indicative only
2. The functionalities will be more elaborate and verified. The presentation in Prebid meeting will be given broad idea
3. Dashboard and reports will be as per the requirement of trustea and not limited to the basic scope
4. The theme of the web and mobile app will only be finalized after consultation with IT project manager of trustea
5. The Scope in the Contract document will be the final only. This scope will be prepared in line with the broad discussion of Pre-Bid meeting

Data Migration

1. Migration of existing entities records and certificated from trusteaDBMS.org
2. Migration of existing audit reports of existing entities uploaded in the trusteaCode.in

- ☒ [trusteadbms.org](#): Database is in MySQL
- ☒ [trusteaCode.in](#): Database is in PostgreSQL

System Dependence

Technology

- ☒ For Web Apps:
Open source - PHP 7, Python based architecture (Preferable)
- ☒ For Mobile Apps:
Hybrid Architecture (For both Android and iOS)
- ☒ DBMS for Web Apps:
MySQL, PostgreSQL
- ☒ UI & UX:
CSS3 onward, CSSX and Responsive
- ☒ MVC & Framework:
Codeigniter or Laravel

Cloud Solution for hosting

- ☒ For Hosting and Platform:
 - ✓ Platform – Linux Flavour
 - ✓ Web Server - Apache / Tomcat Version (Preferable)
 - ✓ Will be provided by trustea

- ✚ For any clarification, feel free to mail us at dutta@trustea.org or support@trustea.org
 - ✚ Application Scope related queries only be entertained
 - ✚ No Financial matter will be discussed in any mail or meeting



trusteaDBMS

Version 2.0

Scope of Work

To be achieved in trusteaDBMS

- ✓ Single mode application for all trustea stakeholders
- ✓ Drilled down details of Entities and entity level interface for certification related activities
- ✓ Excellent appeal process for certified entities and Grievance redressal mechanism for all stakeholders
- ✓ Standard Operating System for empanelment of Certification Body and Implementation Partner
- ✓ At-an-access portal for Certification Bodies, Implementation Partner, Commercial partner and Secretariat for all of their activities in trustea life cycle
- ✓ Robust dashboard comprising of tabular and graphical information for trustea stakeholders
- ✓ Easy capture of audit evidence through mobile app.
- ✓ SMS and Email trigger for notification alert.

Indicative Users of Application

- ✓ Certified Entities
- ✓ Implementation Partner
- ✓ Commercial Partners
- ✓ Trustea Secretariat
- ✓ Certification Bodies
- ✓ Auditors
- ✓ Limited accessibility for Guest users

Introductory Flow

trusteaDBMS Version 1.0

- ✓ Online Application for New Membership Request from trustea web portal

Enhancement

New Inclusion

New Inclusion

trusteaDBMS Version 2.0

- ✓ Post Online application for new request, Scrutiny of submitted request by Secretariat, auto credential for portal (vide trustea protocol book, Part-1, clause 2.2)
- ✓ Online empanelment procedure of Certification Bodies (CB)
- ✓ Online empanelment procedure of Implementation Partner (IP)

Certified Entities

trusteaDBMS Version 1.0

- ✓ Implementation Partner support request
- ✓ Monthly production data upload
- ✓ Certificate History

New Inclusion

New Inclusion

New Inclusion

New Inclusion

New Inclusion

trusteaDBMS Version 2.0

- ✓ External and Internal Audit management

- ✓ Certification Bodies (CB) Engagement

- ✓ Verification Certificate Scope and Audit Extension

- ✓ Appeal Desk

- ✓ Direct accessibility of trustea E-Learning and traceability portal

Certification Bodies

trusteaDBMS Version 1.0

- ✓ Audit Plan Submission
- ✓ Verification Certificate Generation
- ✓ Apply for Decertification

New Inclusion

New Inclusion

New Inclusion

Enhancement

Enhancement

New Inclusion

trusteaDBMS Version 2.0

✓ Auditor Creation, Audit Team management and Audit allocation

✓ Activity Management of Auditors

✓ Audit Report Submission

✓ Embossing Verification Certificate with digital Signature of Certifying Authority

✓ Sanction application management (Warning, Suspension, Cancellation)

✓ System Assurance Audit Desk

Auditor

trusteaDBMS Version 1.0

N/A

New Inclusion

New Inclusion

trusteaDBMS Version 2.0

- ✓ Upload Audit Report and audit completion report
- ✓ Auditors in the field level will be the only mobile app users
- ✓ Auditors can capture the evidence of audit clause for particular audit ID only.
- ✓ The session of capturing evidence for a particular audit ID should be valid within proposed audit timeline.
- ✓ Facility for Offline capturing though mechanism will be started after online credential verification.
- ✓ Auto sync facility of captured data
- ✓ Linking with the CB and trustea reports.

Mobile App

Implementation Partner

trusteaDBMS Version 1.0

- ✓ Submission of Monthly Tracker
- ✓ Submission of NoC

New Inclusion

trusteaDBMS Version 2.0

- ✓ Monthly activities management

Commercial Partner

trusteaDBMS Version 1.0

- ✓ View - Monthly Tracker
- ✓ View – Entity Database

Enhancement

Enhancement

trusteaDBMS Version 2.0

- ✓ Entity performance in sustainability code / Year wise continues improvement graph
- ✓ Customized Report generation for instant decision making (incorporation of Seagate Crystal Report 14.2 SP 27)

Trustea Secretariat

trusteaDBMS Version 1.0

- ✓ Entity Profile database management
- ✓ IP and CB Assignment
- ✓ Monthly Wage Tracker Entry
- ✓ Audit Plan approval process
- ✓ User Management
- ✓ Decertification Processing
- ✓ View - Monthly Tracker



Dropping

- ✓ CB Assignment

New Inclusion

New Inclusion

New Inclusion

New Inclusion

New Inclusion

New Inclusion

New Inclusion

New Inclusion

New Inclusion

Enhancement

trusteaDBMS Version 2.0

- ✓ Entire Control of Audit Cycle – Audit Report checking and trail communication
- ✓ Sanction Management (Warning, Suspension, Cancellation)
- ✓ V.C scope and Audit Extension management
- ✓ Exceptional case management
- ✓ System Assurance audit Desk
- ✓ Grievance and Dispute Resolution Management
- ✓ CB and IP Performance Evaluation
- ✓ MoM Database management
- ✓ CB and IP enrolment management
- ✓ Role based User Management

Common Features

trusteaDBMS Version 1.0

- ✓ Auto Notification through E-Mail

New Inclusion

New Inclusion

trusteaDBMS Version 2.0

- ✓ Alert Mechanism - Alert notification for time bound and new activities.
- ✓ Auto SMS circulation based on activities in Certification life cycle

Disclaimer

- ❖ The mentioned scope of services is the overview and indicative only
- ❖ The functionalities will be more elaborate and verified. The presentation in Prebid meeting will be given broad idea
- ❖ Dashboard and reports will be as per the requirement of trustea and not limited to the basic scope
- ❖ The theme of the web and mobile app will only be finalized after consultation with IT project manager of trustea
- ❖ The Scope in the Contract document will be the final only. This scope will be prepared in line with the broad discussion of Pre-Bid meeting

** All the features of this application will be as per the updated trustea protocol book and its subsequent revised notification. All the above-mentioned activities are from web-based platform only.*

SOP Requirement – At a glance

SL no.	Process	Indicator
1	New Membership Request handling	☑
2	Certification Body Empanelment Process	☑
3	Implementation Partner Enrolment Process	☑
4	Implementation Partner Allotment Process	☑
5	V.C scope and audit extension process	☑
6	Modalities for Audit Cycle Timeframe and Certification	☑
7	Sanction (Cancellation, Suspension etc.) Process	☑
8	Grievance Management Process	☑
9	CB and IP Evaluation process and matrix	☑

Format standard Requirement – At a glance

SL no.	Process	Indicator
1	Certification Body Accreditation Certificate Format	☑
2	Certification Body Empanelment Contract Document Format	☑
3	Implementation Partner Enrolment Certificate Format	☑
4	Implementation Partner NoC Format	☑
5	Various Types of Sanctions Certificates	☑
6	CB and IP Yearly Evaluation Certificate	☑

Thank You

Annexure – II Evaluation Matrix

Process:

For General & Technical:

Score for each criterion is 1 and each Tick (✓) mark represent 1 mark.

For Financial:

Top 2 Scorers will be financially evaluated depend upon the number of submitted bids

Part 1: General and Technical Evaluation Matrix (Mark: 1 / criteria)	Total mark: 11		
Criteria	<i>Vendor Name [1]</i>	<i>Vendor Name [2]</i>	<i>Vendor Name [n]</i>
Document			
Letter of Authorization			
Expression of Interest in Form-I			
Details of Experience in Form-II with supporting documents			
Company Profile and association			
Budgetary estimate in Form-III			
Criteria			
Trade License / Certificate of Incorporation			
GST Certification			
PAN / TAN			
Income tax return of Last year			
Inhouse resource details			
Office should be in India			
Total Score			
Rank			

Part 2: Financial Evaluation Matrix									
	<i>Vendor Name [1]</i>			<i>Vendor Name [2]</i>			<i>Vendor Name [n]</i>		
Cost Criteria	Cost	Weeks	Cost/Week	Cost	Weeks	Cost/Week	Cost	Weeks	Cost/Week
Web Application Development, Deployment, Testing & Go-Live			[X1]			[X1]			[X1]
Mobile Application Development, Deployment, Testing & Go-Live			[X2]			[X2]			[X2]
Data Migration from the old applications			[X3]			[X3]			[X3]
Post Go-Live free support for 2 Months	[X4]			[X4]			[X4]		
Total Cost (Excluding tax) – [A] = [X1+X2+X3+X4]									
Annual Recurring Cost									
Google Play and iStore charge									
Total Annual Recurring Cost (Excluding tax) – [B]									
Rank [A] – <i>Based on Estimation. Lower bidder will be the highest scorer</i>									
Rank [B] – <i>Based on Estimation. Lower bidder will be the highest scorer</i>									