# Request for Proposal

## Selection of the Bidder for Implementation of Project Management, CRM, Asset Management and Support Center for Odisha Renewable Energy Development Agency (OREDA), Bhubaneswar, Odisha.

**RFP No.: OCAC-TH-04/2025/ENQ/25044**

# Vol-II | Terms of Reference

**ODISHA COMPUTER APPLICATION CENTRE**

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# 1 Background

The Odisha Computer Application Centre (OCAC) is a key government entity under the Department of Electronics & Information Technology (DeitY) of the Government of Odisha. OCAC serves as the central hub for implementing and overseeing e-Governance initiatives across the state. Its primary mission is to modernize government services through technology, ensuring better public service delivery and governance through efficient use of information and communication technology (ICT).

OCAC plays a pivotal role in driving digital transformation within various government departments and public sector organizations, leveraging technology to improve the efficiency, transparency, and accessibility of services for citizens. It is involved in the development and deployment of ICT-based solutions across various sectors such as education, health, agriculture, urban governance, rural development, and public distribution systems.

As the technology backbone for the Government of Odisha, OCAC is responsible for ensuring seamless digital service delivery, including the management and support of state-wide e-Governance applications. The center has also been instrumental in the creation of online platforms for public services, aiming to enhance citizen engagement and satisfaction through digital interfaces.

OCAC collaborates closely with various government departments, local bodies, and agencies to implement digital solutions that cater to the evolving needs of the public, there by contributing to the state's vision of being a digitally empowered government. Through its continuous efforts in fostering innovation and promoting digital literacy, OCAC aims to create a more transparent, responsive, and citizen-centric government in Odisha.

**Project Background**

Odisha Renewable Energy Development Agency was constituted as a State Nodal agency in 1984 under aegis of Dept. of Science and Technology, Government of Odisha with a view to popularize the exploitation and use of renewable energy resources in the State.

While the State's mission in renewable energy focuses on significantly increasing the use of these sources to achieve energy security, reduce carbon emissions, and promote sustainable development through initiatives like solar parks, wind power projects, and hydro-power development, aiming to reach a large-scale adoption of clean energy by setting ambitious targets for renewable energy capacity installation. India has also set a target of producing 175 GW by 2022 and 500 GW by 2030 from renewable energy.

In order provide timely and effective services to customers OREDA established a Customer Relationship Centre (CRC) for better customer experience and to make it

further sustainable, intends to set a standard by automating the associated customer interfacing process through strong CRM for queries and grievance management with ticketing system, Asset life-cycle management, workflow for faster decisions, Dashboard for central monitoring and management.

### 1.1.1 Current Challenges

The Odisha Renewable Energy Development Agency (OREDA) is responsible for driving the state's transition to renewable energy, enhancing the efficiency of energy infrastructure, and improving the accessibility of clean energy solutions across Odisha. While substantial progress has been made in advancing renewable energy projects, there are several challenges and limitations in managing renewable energy assets, vendor relationships, and addressing grievances, which hinder the optimization and scaling of these initiatives. These challenges include:

**Fragmented Asset Management Systems:** There is no unified system for monitoring and managing the renewable energy assets deployed across Odisha. The lack of centralized data on asset health, performance, and maintenance needs creates inefficiencies in tracking and optimizing energy resources, leading to unplanned downtimes and increased operational costs.

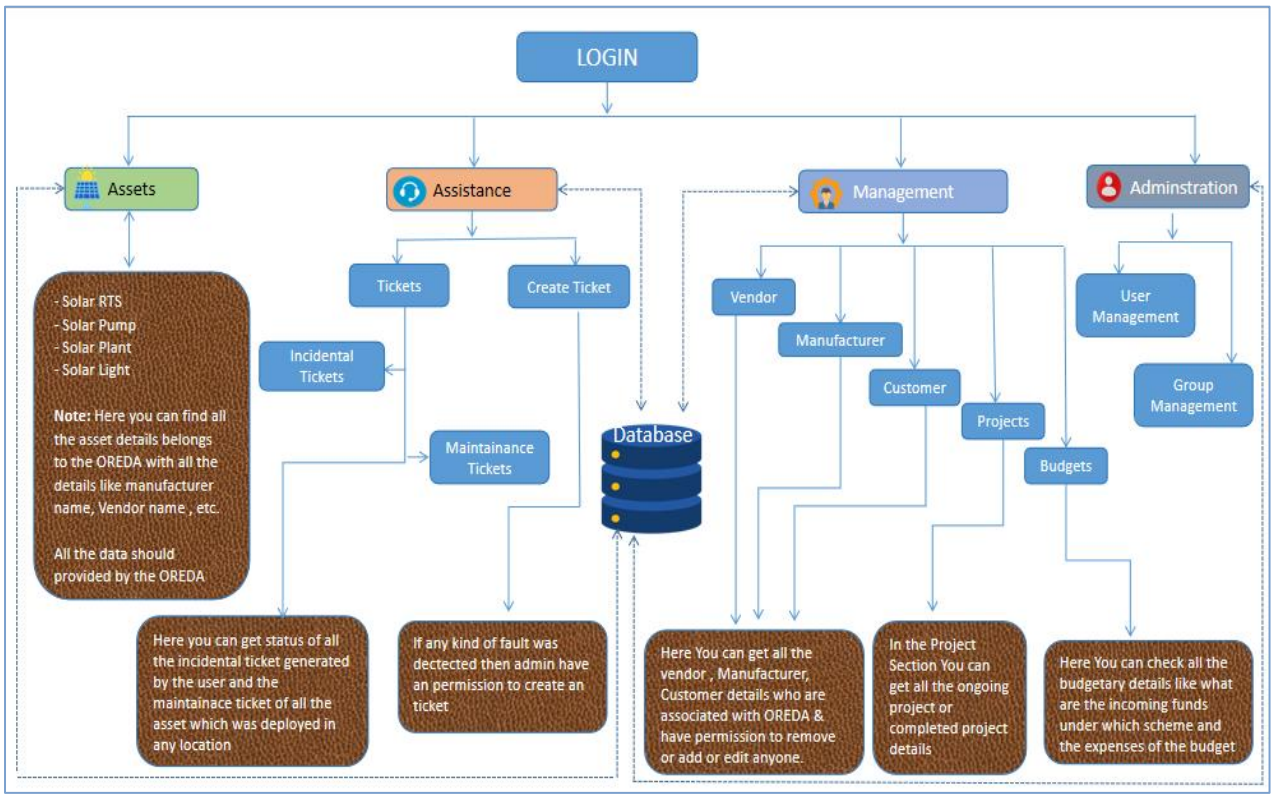
**Ineffective Vendor Management:** Managing a large number of vendors for procurement, installation, and maintenance of renewable energy assets is a complex and fragmented process. Without an integrated vendor management system, it becomes difficult to track vendor performance, monitor contract compliance, and ensure timely delivery of goods and services. This leads to delays, cost overruns, and poor quality of service.

**Lack of Robust Grievance Redressal Mechanism:** The absence of a real-time, efficient grievance management system for citizens and stakeholders has made it challenging to address issues related to renewable energy projects. Complaints regarding installation defects, service disruptions, or performance failures often go unresolved or face delays in resolution, leading to dissatisfaction and reduced trust in the system.

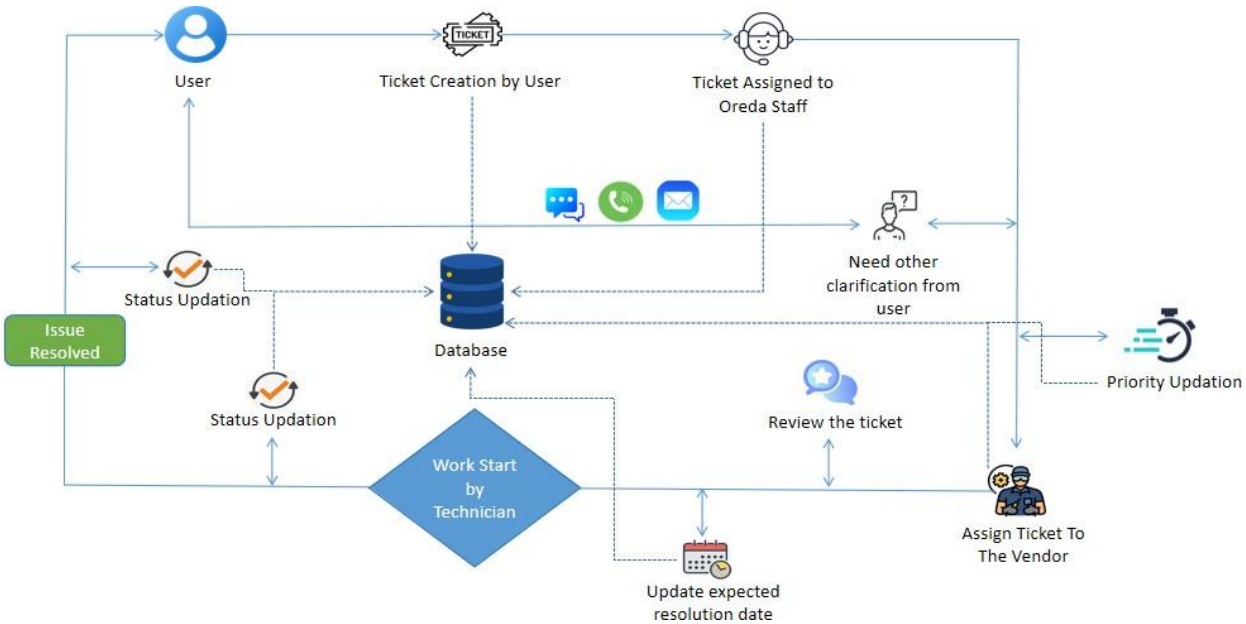
**Data Silos Across Departments:** Feedback, asset performance data, and vendor records are often stored in isolated systems, making it difficult to consolidate and analyze data across multiple departments. This lack of data integration impedes the ability to generate comprehensive insights, identify systemic issues, and make informed decisions for continuous improvement in service delivery and policy effectiveness.

**Compliance and Security Risks:** As a government organization, OREDA needs to ensure that all data collected through surveys and feedback mechanisms comply with national and international data protection regulations. This includes securing personally identifiable information (PII) and ensuring that citizen data is managed securely to prevent breaches and misuse.

### 1.1.2 Envisaged System Workflow Diagram




### Ticketing System Workflow




The Odisha Renewable Energy Development Agency (OREDA) want a streamlined and comprehensive workflow for managing and optimizing renewable energy assets. This process should integrate multiple asset data collection points, a centralized database for asset performance aggregation, and advanced analytics to derive actionable insights for enhanced decision-making and asset management efficiency.

# 2 Scope of work

To address the current challenges in managing renewable energy assets, vendor relationships, and grievance redressal, **OREDA** seeks an integrated solution that focuses on asset management, vendor management, project management, and grievance management. The solution should include a comprehensive asset management platform and a robust grievance management system.

The project has the major components as below:

A. Fund Management and Vendor Portal

B. Asset Management

C. Project Management and Monitoring

D. Customer Relationship Management System

E. Customer Relation Center (Call Center)

## Part A: Vendor Portal and Fund Management

OREDA has multiple registered vendors as OEMs and Implementing Agencies [EPC Vendors] to implement renewable/solar based solutions at different locations of the state with selected users as customers. These vendors are selected and evaluated from time to time based on their performance and other set parameters.

The proposed application should incorporate a workflow-based decision platform to enable department and EPC agencies [selected through existing process] from fund allocation against different schemes, orders to registration of vendors, their work completion report till payment and performance monitoring.

- Create appropriate masters to register departmental Users and stake holders, OEMs, Schemes details, etc.
- EPC Vendor portal for vendor on boarding, work assigned details, status of projects till closure, document uploads, bill desk integration, performance reports, etc.
- Workflow system for Fund allocation for projects to approval of customer application for respective projects with selection of EPC vendor with approved OEM products, Order to Delivery to implementation and its joint certification on compliance, Bill desk for bill upload with approvals against delivery, acceptance, verification reports, its approval levels to fund disbursements of Respective vendor.
- This will be online vendor portal which will be further integrated with support stake holder for asset life cycle till contract ends.
- Role based User credentials to access, monitor and manage the entire process
- Dashboard to capture with dynamic features for different parameters to monitor and manage the overall process with History and Records for future use and reporting's.

- This should also be mobile friendly interface for all the appropriate modules

***Fund Management System***

- Deposit Management: Track all incoming deposits (grants, subsidies, investor funds, etc.).
- Scheme-Wise Budget Allocation: Allocate funds per scheme and project category.
- Government Budget: Monitor funds received from state/national agencies.
- Work Category & Amount Received: Maintain records of funds allocated to different work categories.
- Fund Disbursement Workflow: Automate the approval & release of payments based on milestones.

## Part B: Asset Management System

OREDA plans to implement a comprehensive Asset Management System (AMS) with a user-friendly help-desk and ticketing system. Key features include:

- **User and Asset Databases**: Creation of a detailed user database and an asset database categorized by project, asset type, EPC vendor, and location.
- **Asset and Spare Parts Tracking:** The system will allow for tracking assets and their associated spare parts, including stock availability.
- **Supplier and Procurement Management:** It will manage supplier details, inventory availability, pricing, procurement, and installation by selected vendors.
- **Inventory Management:** The system will track and manage inventory across different locations with GPS coordinates, ensuring efficient stock monitoring and reporting.
- **Warranty and Support Management**: The system will handle warranty periods, support services, and the procurement process according to OREDA's terms.
- **Help-Desk Integration:** A centralized help-desk and ticketing system will capture service requests, complaints, and queries, with escalation protocols for delays. It will also schedule maintenance and support services, integrating with vendors and field staff.
- **Scheduled Maintenance and Monitoring:** The system will support regular preventive maintenance, performance monitoring, and equipment health tracking to avoid major issues.
- **Inventory Specifications and Decisions:** Users will be able to view product specifications and make informed decisions about replacements.
- **Audit and Performance Tracking:** It will offer reconciliation of asset details, audit support, and performance monitoring with history and reports.
- **Dashboard:** A dashboard will consolidate service requests, performance data, and reports for effective management and oversight.

## Part C: Project Management

OREDA undertakes multiple renewable energy projects, collaborating with various EPC vendors to deploy and maintain assets across different locations. To ensure efficient tracking and management of projects, a Project Management System (PMS) is required. This system will provide end-to-end visibility of projects, from initiation to completion, ensuring transparency, accountability, and efficient resource management.

The **Project Management System** for OREDA will include the following key features:

### I. Project Creation & Tracking

- **Project Setup:** Users can create detailed projects, specifying descriptions, objectives, timelines, budgets, and stakeholders.
- **Project Categorization**: Projects will be categorized by type, such as Solar, Wind, Biomass, etc.
- **Stakeholder Assignment**: EPC vendors and OREDA staff will be assigned specific responsibilities for each project.
- **Project Dashboard**: A dashboard will display real-time project progress, including completed milestones, pending tasks, and any delays.

### II. Project Stakeholders & Roles

- **OREDA Admin & Staff:** Full access to project data, approvals, and monitoring. They oversee the project's progress.
- **EPC Vendors:** Vendors can update the project status, report issues, and manage the installation process.
- **End Users (Customers/Communities):** Customers can track project status, request support, and provide feedback after the project is installed.

### III. Asset & Inventory Integration

- **Asset Linkage**: Each project will be linked to the deployed assets and inventory, such as solar panels, batteries, and more.
- **Asset Tracking**: Users can track the equipment used in each project, including details about the assigned vendor for the installation.
- **Real-Time Inventory Visibility:** The system will show real-time stock availability and procurement requirements for each project's assets.

### IV. Project Workflow Management

- **Initiation**: Define the project's scope, budget, vendor selection, and set expectations for timelines.
- **Execution**: Track the installation process, assign tasks, and update the progress status.
- **Inspection & Certification:** Ensure a joint inspection and compliance tracking post-installation before certification.
- **Completion & Handover:** OREDA provides final approval for the project, transitioning it to operational status.

### V. Task Assignment & Status Updates

- **Task Assignment:** Tasks are assigned to vendors, engineers, and field staff based on project stages.
- **Automated Status Updates:** The system will automate updates across stages such as Planning, Installation, Inspection, and Completion.
- **Progress Indicators:** Color-coded indicators show project status (Green: On Track, Yellow: Delayed, Red: Critical).
- **Issue Tracking:** Users can log issues, schedule corrective actions, and track resolutions as part of project management.

## Part D: Customer Relationship Management & Ticketing System

The suggested enhancements for the Customer Relationship Management (CRM) System based on the system study and analysis include:

- Escalation Mechanism: To ensure accountability and timely resolution, complaints should be escalated to higher authorities if not addressed by the concerned agency.
- Geo-Tagging of Assets: The exact location of assets should be captured using latitude and longitude to help maintenance teams track them effectively.
- Intuitive Dashboard: The portal's home screen should have a user-friendly and attractive dashboard displaying key statistics for senior management.
- Customer Information Management: The system should store and manage customer details (name, address, phone, email) to facilitate quick resolution of grievances.
- Team Collaboration: The CRM should support seamless communication and collaboration among team members for more efficient work.
- Mobile-Friendly Interface: The system should be accessible on mobile devices, allowing users to access and update customer information on the go.
- Centralized Database: A central database will store information on registered vendors, customers, and other users.
- Automated Service Requests: Service requests should be automatically forwarded to the respective vendors for resolution, and can be generated through voice, email, or mobile.
- Open-Source Development: The application will be developed on an open-source platform and hosted on the web as per OREDA's recommendation.
- Role-Based Login & Permissions: Different users (OREDA employees and vendors) will have access according to their roles, allowing them to track and resolve service requests or complaints.

These provisions aim to improve efficiency, accountability, and overall customer service.

## Part E: Customer Relation Center (CRC)

A centralized support center will be established at OREDA, equipped with the necessary software and hardware for a contact center. Key details include:

- Operating Hours: 10 AM to 6 PM every day, including holidays and Sundays.
- Facilities: The centre will be housed in a 1500 square-foot, fully furnished, air-conditioned space with security and power backup.
- Staffing: The centre will have 2 seats and 1 supervisor for inbound and outbound calls.
- Communication: OREDA will provide official landline and toll-free numbers for customer calls (0674-2550580 and 1800-345-7135), with the capability to register missed calls and SOS-based mobile app queries. OREDA will cover monthly telephone bills and rentals.
- Role of Customer Relation Executive (CRE): CREs will handle ticketing, address issues and grievances, provide L1 support for OREDA projects, and manage queries related to solar/renewable energy projects in Odisha.
- Ticketing Process: Once a ticket is generated, CREs will attempt to resolve it at L1 level. If a site visit or third-party involvement is required, the ticket will be assigned accordingly, with notifications sent to the relevant authorities.
- Complaint Handling: The center will manage and resolve user complaints by coordinating with service providers and following up with EPC teams to ensure timely ticket closure.
- Reporting and Feedback: Monthly reports will be generated based on key performance metrics, and user feedback will be collected for final ticket closure.
- SOP and FAQs: CREs will adhere to SOP guidelines for FAQs and query resolution.
- Internet connectivity and Telephone Connectivity would be provided by OREDA.
- Computer for the resources will be provided by OREDA

## 2.1 SCOPE OF WORK

The Odisha Renewable Energy Development Agency (OREDA) invites proposals for the procurement and implementation of an advanced solution for asset management, vendor management, and grievance redressal in renewable energy projects. The proposed solution will serve as a centralized platform to efficiently monitor, manage, and optimize renewable energy assets, track vendor performance, and address citizen grievances across various channels.

**Key Features of the Proposed Solution**

- **Centralized Asset Management Platform:** A unified system for real-time tracking, monitoring, and optimizing renewable energy assets such as solar panel , solar pump etc across Odisha, with a centralized database to aggregate asset data for informed decision-making, performance analysis, and proactive maintenance.
- **Integrated Vendor Management Module:** Streamlined functionality for vendor registration, performance tracking, contract management, and compliance monitoring, with automated workflows for managing procurement, installation, maintenance, and performance evaluation, all centralized to ensure transparency and accountability across renewable energy projects.
- **CRM/ Grievance Redressal System:** A unified platform for capturing, tracking, and resolving grievances related to renewable energy services, assets, and vendor interactions, with multi-channel submission options (SMS, email, mobile apps, IVR, phone calls) and real-time status tracking, supported by automated escalation workflows for timely resolutions.
- **Continuous Feedback and Performance Monitoring:** Real-time feedback collection from stakeholders, performance monitoring of renewable energy assets with automated alerts for system irregularities, and insights on project effectiveness and alignment with state goals.
- **Integrated Call Center Module:** Streamlined functionality for ticket creation, tracking, and resolution.

**OREDA's Vision**

The Odisha Renewable Energy Development Agency (OREDA) envisions creating a unified and effective platform for citizens to engage and provide feedback on the state's renewable energy initiatives and services. This vision aligns with the Government of Odisha's commitment to promoting sustainable energy solutions while ensuring transparency, accountability, and responsiveness to citizen concerns.

**Project Scope in brief**

The scope of the project includes:

- Deployment of an integrated asset and vendor management system for monitoring and optimizing renewable energy assets.
- Implementation of a centralized grievance redressal system for efficient tracking and resolution of issues related to renewable energy services and vendors.
- Development of a reporting and analytics platform for real-time performance monitoring, anomaly detection, and data-driven decision-making.
- Development of a mobile application for field staff to upload performance reports, asset health data, and maintenance updates.

This initiative reflects OREDA's commitment to enhancing governance in the renewable energy sector and ensuring prompt, efficient service delivery to the citizens of Odisha. By fostering transparency, accountability, and active citizen engagement, OREDA strives to create a responsive framework that addresses citizen concerns and drives sustainable energy solutions across the state.

**The bidder has to furnish unpriced Bill of Quantities of the items they have quoted in Technical bid.**

**The bidder has to furnish approach and Methodology including platform details for software applications as well as hosting requirements in Technical Bid**

The detailed scope of the RFP are as follows

## 2.2 DESIGN

The Service Provider shall design the solution architecture and specifications to meet the requirements mentioned in this document. The Service Provider shall be entirely responsible for the design and architecture of the software system implemented to satisfy all requirements as described in this document, including ensuring optimal system performance and scalability.

## 2.3 DEVELOPMENT

The Service Provider shall identify, design, and develop the necessary components and functionalities required to address the application requirements mentioned in this RFP. The Service Provider shall deliver the following documents along with the developed components:

- Business process guides
- Sample reports
- Frequently asked question (FAQ) guides
- Any other documentation necessary for the effective use of the implemented solution

The Service Provider shall also implement a system for monitoring Service Level Agreements (SLAs) to ensure the system meets all SLA measurement requirements and accurately calculates applicable penalties as outlined in this document.

## 2.4 INTEGRATION

The Service Provider is responsible for integrating the application with the following systems relevant to OREDA. OREDA will facilitate the required APIs and web services for seamless integration. Any additional integration requirements that arise during the project period will need to be implemented by the Service Provider with additional cost. The primary integrations will focus on obtaining data related to citizens who have interacted with OREDA's services or accessed any e-Governance applications for renewable energy-related services. These minor integrations must be incorporated by the bidder as part of the initial scope.

| Sl# | Application | Purpose of Integration |
|---|---|---|
| 1 | SMS & Email | Automated Feedback Collection through SMS & Email |
| 2 | WhatsApp | Automated Feedback Collection through WhatsApp |

## 2.5 TESTING

The Service Provider shall design the testing strategy, including test cases, and conduct comprehensive testing of various components. Application testing shall include at least unit testing, system integration testing, performance testing, and other necessary tests. At least the following activities will be carried out by the Service Provider:

a) Ensure the solution meets all functional and technical requirements as per the RFP, including Functional Requirement Specifications (FRS).

b) Perform testing of the solution based on the test plan, document the results, and fix any bugs identified during testing.

c) Ensure that the integration aspects of the solution are successfully tested.

d) Connecting with multiple data sources, databases, their seamless integration etc. should be tested and verified.

OREDA shall provide formal approval for the test plan. The Service Provider is responsible for ensuring that the end product delivered meets all the requirements specified in this bidding document and that the solution is fully functional, reliable, and performs at the required standards.

## 2.6 THIRD PARTY SECURITY AUDIT

a) The Service Provider needs to ensure that the solution follows the CERT-In Security Policy and Guidelines.

b) The Service Provider shall appoint CERT-In empaneled auditor who shall be responsible for performing the security audit of the solution.

c) The cost of the audit and rectification of any non-compliance issues shall be borne by the Service Provider.

d) Carryout security audit before go-live of application and obtain the safe-to-host certification

e) The audit shall be performed at least on the below mentioned aspects.

- Accessibility Testing
- Application Security Audit
- Vulnerability Testing

f) The illustrative deliverables for this activity are mentioned below.

| ***Activity*** | ***Responsibility*** |
|---|---|
| First Round Audit Report | Auditor |
| Rectified solution and submission of next round of audit | Service Provider |
| Next Round Audit Report | Auditor |
| If required, rectified solution & submission of next round of audit | Service Provider |
| Compliance Confirmation | Auditor |

## 2.7 SSL CERTIFICATION

The Service Provider shall carry out SSL certification.

a) Secure connection between Client and Server through Secure protocol HTTPS

b) Encryption of Data during transmission from server to browser and vice versa

c) Encryption key assigned to it by Certification Authority (CA) in form of a Certificate.

d) SSL Security in the application server

## 2.8 TRAINING

a) The Service Provider is required to undertake training on a train the trainer mode.

b) Training would be done at OREDA Headquarter in Bhubaneswar

c) OREDA will facilitate the training space & related logistics

d) The schedule / training calendar and the training material for imparting training shall be developed by the Service Provider in consultation with OREDA, and department officials. The Service Provider shall submit a hardcopy of the training material to OREDA before every training session.

e) In case of modifications, either in the training plans or substitutions of the regular trainers, proper communication with OREDA and Participating Department need to be made.

f) If required, the Service Provider may conduct the training on virtual mode and related expenditure for licensing (fixed & recurring) shall be borne by the service provider.

## 2.9 DEPLOYMENT & CONFIGURATION

a) The Service Provider shall deploy the application/portal on OSDC data center, as provided or designated by OREDA. The deployment process should ensure that the software solution is properly configured, optimized, and integrated with existing systems. The Service Provider shall be responsible for ensuring that the application is fully functional, secure, scalable, and meets all specified technical and operational requirements upon deployment to the cloud environment.

b) The Service Provider shall be responsible for the end-to-end management of hosting and deployment of the application.

c) The Service Provider shall ensure deployment of the application as per the policy of OREDA.

## 2.10 UAT & GO-LIVE

After the completion of the development work for the application, OREDA will conduct technical reviews of the development work performed by the Service Provider as part of the User Acceptance Testing (UAT). The Service Provider shall be responsible for:

a) Preparation and submission of test strategy, test cases and test results

b) Demonstration of module-wise functionalities/ features before the OREDA in staging environment

c) Support OREDA and its designated authority for conducting the testing and provide access of the systems as required by them.

d) Rectification in the new application for any issues/ bugs/ and improvements/ Enhancements / up-gradations suggested Departments (if any) during the UAT without any additional cost.

## 2.11 DATA MIGRATION

The Data Migration to be performed by the Service Provider shall be preceded by an appropriate Data Migration Strategy & Methodology which is to be prepared by the Service Provider and approved by OREDA.

Data Migration should be carried out as per industry practice and all care must be taken to log in each error. The Service Provider should clearly define the data migration strategy in the proposal. The following activities will be carried out as part of the Data Migration:

a) Define all the specifications that are needed to populate the data into the new system

b) Prepare the Data cleaning and migration plan and submit to concern authority for approval.

c) Prepare uniform codification of all data sets

d) Identification, configuration or development of the data upload / download programs for the Data Migration

e) Ensure minimum business downtime at the time of data cleaning and migration

f) Ensure the accuracy and completeness of the migrated data

g) Ensure migration of all data is completed by the time of Go Live

h) Database of existing system would be migrated to the newly developed system

i) The Service Provider will be expected to understand the data which has been captured and devise a template so that meaningful information can be captured and entered into the new system

j) This template should have basic sanity check to prevent entry of incorrect information. E.g. numerals should not be allowed in patient name etc.

### 2.11.1 Implementing Software & Tools

a) The Service Provider shall design, implement/customize the solution and shall install supplied tools and licenses as mentioned in the BOQ.

b) The observations of the audit shall be addressed and same shall be tested and verified again before the go-live.

## 2.12 POST IMPLEMENTATION SUPPORT

### 2.12.1 Application Support

a) Fixing the bugs identified during the period
b) The defects will be covered, which occur due to development error(s), the subject of which appears in the requirements specification.
c) Minor changes to the business process will be addressed except new table, database etc.
d) Monitor application to ensure that the application does not suspend, hang etc.
e) Ensure the desired functioning of the Interface / integration
f) Ensuring uptime of the application developed
g) Ensure periodic backup and recovery of the Data
h) Perform Performance Tuning
i) Modification / improvisation of existing MIS reports
j) New software modules are not covered in this phase.
k) Quality audit compliance (if applicable)
l) Regular database maintenance activity

### 2.12.2 Operational Support

**The Service provider will also provide following support for the CRM & Reporting Console to all participatory departments of the OREDA Contact Centre**

a) Ensure the accuracy and timeliness of data uploaded as received
b) Resolve and report the data discrepancies to the designated OCAC persons
c) Submit document on the performance of the application on a quarterly basis
d) Perform Performance Tuning
e) Provide handholding support, if required
f) Present relevant information and impart training as applicable
g) Support for high level review meeting

## 2.13 PROJECT MANAGEMENT

The envisioned project is a multi-disciplinary initiative. An effective project management plan and commitment to adhere to it is a mandatory requirement. The project plan should also include the resource, task and time plan for the entire duration of the project. The Service Provider shall employ best practices in project management methodology to ensure that the envisioned project components are developed and implemented within the defined time period. A copy of the project management plan shall be handed over to the department to keep track of the progress of the project

## 2.14 GUIDING PRINCIPLES

The proposed solution should adhere to the following principles.

### 2.14.1 Standards

a) The system architecture should be based on industry standards and protocols
b) The system will be centrally deployed and globally accessed
c) The system shall be designed to be scalable and easily extensible
d) The system should be flexible to cater to changing business, industry and compliance requirements (including reporting requirements in proper formats)

### 2.14.2 Application

a) All applications must consider appropriate security, performance, efficiency and maintainability issues.
b) The ownership of the product licenses would be with OREDA.

### 2.14.3 Integration

The integrated solution design should include framework for integration of both internal and external applications and services using suitable architecture.

### 2.14.4 Data

a) Data will be owned, shared, controlled and protected as a corporate asset of the OREDA.
b) Data should only be accessed through application / interfaces to create, update and delete. There should not be any direct access to the data layer for users.

### 2.14.5 Data Security

a) The Service Provider shall provide strategy to maintain data security at the application level
b) The Service Provider shall provide strategy to maintain data security at the database level
c) The Service Provider shall provide strategy to maintain data security at the messaging and middleware level
d) The Service Provider shall provide security strategies when the applications are accessed from outside the network or accessing resources outside the network.
e) The Service Provider shall provide strategies of encryption and security for external transaction with partner network and systems

## 2.15 ADHERENCE TO STANDARDS

The system shall comply with relevant defined industry standards (their latest versions as on date) wherever applicable. This will apply to all the aspects of solution including but not limited to its design, development, security, installation, and testing. The suggested architecture must be scalable and flexible for modular expansion. It should ensure ease of integration with software / applications developed using common industry standards since the solution may be linked and connected to other sources (websites, contents, portals, systems of other user departments etc.) as well as there may be loose/tight integration with backend system of other departments depending on individual service processes. The solution architecture should thus have provision to cater to the evolving requirements of the Department.

A reference list of the minimum industry standards which the system components should adhere to is mentioned below:

| Component | Standards |
|---|---|
| Information Access / Transfer Protocols | SOAP, HTTP/HTTPS |
| Interoperability | Web Services, Open Standards |
| Portal Development | W3C Specifications |
| Document encryption | PKCS specification |
| Information Security | ISO 27001 certified System |
| Operation | ISO 9001 Certified |
| Service Management | ISO 20000 specifications or latest |
| Project Documentation | IEEE/ISO Specifications for documentation |
| Data Standards | All-important data entities should be in line with standards published by DeiTY. |

## 2.16 SECURITY, INTEGRITY & CONFIDENTIALITY

***a)*** ***Web Services Security:*** System shall comply to all the Web services including routing, management, publication, and discovery should be carried out in a secure manner. Those who are using the Web services should be able to utilize security services such as authentication, authorization, encryption and auditing. Encryption of data shall take place at client level itself. Application server shall provide SSL security.

***b)*** ***Data Integrity and Confidentiality:*** Data integrity techniques need to be deployed to ensure that information has not been altered, or modified during transmission without detection. Similarly, Data confidentiality features are also to be applied to ensure that the data is only accessible by the intended parties.

***c) Transactions and Communications:*** With respect to the Data Transactions and Communications, system needs to ensure that the business process are done properly and the flow of operations are executed in correct manner.

***d) Non Repudiation Security*:** The application shall have the Non-repudiation security services to protect a party to a transaction against false denial of the occurrence of that transaction by another party. End-to-End Integrity and Confidentiality of Messages The integrity and confidentiality of messages must be ensured even in the presence of intermediaries.

***e) Database Controls*:** The database controls for online transaction processing systems like access to database directly, access to database through application, access to log files, access by the remote terminals, DBA controls, backup policy and backup procedures.

## 2.17 EXIT PLAN

a) The selected firm will provide systematic exit plan and conduct proper knowledge transfer process to handover operations to OREDA technical team at least three months before project closure.

b) IT resource persons of OREDA will work closely with resource persons of the Service Provider at test, staging and production environment during knowledge transfer phase.

c) All knowledge transfer should be documented and possibly recorded.

d) The Service Provider will ensure capacity building of the IT resource persons of OREDA on maintenance of software and infrastructure.

## 2.18 PROJECT DOCUMENTATION

The Service Provider will share below list of documents to OREDA during the project contract period.

a) Latest version of Source Code

b) System Requirement Study Documents

c) High Level Design (HLD) / Low Level Design (LLD) documents including

- Application architecture documents
- ER diagrams and other data modelling documents
- Database design
- Application component design including component deployment views, control flows, etc.
- Application flows and logic

d) Test Plans and Reports
e) Issue Logs
f) User Manual
g) Application Installation & Configuration Manual
h) Report of Security Audit & Safe-to-Host Certificate
i) Any other documents defined under Timeline & Tentative Deliverables
j) All the above documentation should be done as per IEEE/ISO/CMM Standard

# 3 Functional Requirements

## 3.1 MODULES TO BE DEVELOPED:

### 3.1.1 Asset and Vendor Management System

| Sl# | Functional Specification - Asset Management |
|---|---|
| FR 1. | The system shall provide a unified platform to manage, track, and optimize renewable energy assets such as solar, wind, and battery storage systems across Odisha. |
| FR 2. | The platform should offer real-time performance monitoring of renewable energy assets and provide alerts for performance irregularities |
| FR 3. | The platform should allow for proactive maintenance management, providing reminders and schedules for asset inspections and servicing. |
| FR 4. | The system should be able to integrate with external databases and sources for up-to-date asset performance and operational data. |
| FR 5. | The system shall include automated reports and analytics to identify maintenance needs, asset performance trends, and areas requiring improvement. |
| FR 6. | The platform should support multi-level user roles for different stakeholders (OREDA staff, maintenance teams, vendors, etc.) to manage and access the asset data based on their access permissions. |
| FR 7. | The platform should allow for detailed asset tracking, including serial numbers, installation dates, warranties, and maintenance history for each renewable energy asset to ensure compliance with regulatory and manufacturer requirements. |
| FR 8. | The system should allow for asset lifecycle management, including tracking depreciation, useful life, and end-of-life recommendations for optimal asset replacement or retirement planning. |

| Sl# | Functional Specification - Vendor Management |
|---|---|
| FR 9. | The platform shall provide a streamlined functionality for vendor registration, performance tracking, contract management, and compliance monitoring. |
| FR 10. | The system should include automated workflows for managing procurement, installation, and maintenance services. |
| FR 11. | The platform should allow real-time tracking of vendor performance, including timelines for delivery, quality of services, and contract adherence. |
| FR 12. | The platform shall allow vendors to be rated and reviewed based on performance metrics to ensure transparency and accountability. |
| FR 13. | The system should support the generation of automated alerts for upcoming contract renewals, compliance checks, and user reviews. |
| FR 14. | The platform should provide the ability to automatically generate purchase orders, track contracts, and monitor compliance with set terms and conditions. |

### 3.1.2 CRM / Grievance Management System

| Sl# | Functional Specification - Grievance Management |
|---|---|
| FR 15. | The platform shall provide a centralized grievance management system for renewable energy service-related complaints and issues. |
| FR 16. | The system should enable multi-channel grievance submission, including SMS, WhatsApp, IVR, email, phone calls, and mobile applications. |
| FR 17. | The system should allow users, vendors, and OREDA staff to track the status of submitted grievances in real-time. |
| FR 18. | The platform should support automated escalation workflows to ensure timely resolution of grievances by the appropriate authority. |
| FR 19. | The platform should generate automated reminder notifications for unresolved grievances based on pre-defined timelines. |

### 3.1.3 Performance Monitoring and Analytics

| Sl# | Functional Specification – Performance Analytics |
|---|---|
| FR 20. | The platform should provide real-time feedback collection from stakeholders (citizens, vendors, and OREDA staff) to monitor the effectiveness of renewable energy assets and related services. |
| FR 21. | The system shall integrate with renewable energy asset performance data to provide insights on the effectiveness of the systems in achieving OREDA’s goals. |
| FR 22. | The platform shall allow administrators to define and track key performance indicators (KPIs) related to renewable energy projects, including energy production, efficiency, and maintenance frequency. |

| Sl# | Functional Specification – Performance Analytics |
|---|---|
| FR 23. | The system should allow for data aggregation and visualization of performance metrics to provide insights into service delivery effectiveness and areas for improvement. |
| FR 24. | The platform should support advanced reporting tools with customizable templates for performance, vendor, and grievance analysis. |
| FR 25. | The system shall support automated alerts for performance irregularities or asset issues that may require attention. |

### 3.1.4 Multi-Channel Feedback Collection

| Sl# | Functional Specification |
|---|---|
| FR 1. | The platform should support feedback collection from multiple touchpoints across the lifecycle of renewable energy projects, such as during installation, service requests, policy implementation, and maintenance. |
| FR 2. | The system shall be capable of sending feedback requests through Email, SMS, WhatsApp, IVR, Mobile App, and Web. |
| FR 3. | The platform should provide advanced scheduling for feedback collection, allowing surveys to be sent at pre-defined intervals or on specific dates and times. |

### 3.1.5 Project Management

| Sl# | Functional Specification |
|---|---|
| FR 1. | The platform shall include a centralized project management dashboard that provides real-time updates on the status of all renewable energy projects, including asset deployment, maintenance schedules, vendor performance, and grievance resolutions. |
| FR 2. | The platform should have the capability to define, assign, and track tasks related to project implementation, maintenance, and grievance management, ensuring accountability across all project stages. |
| FR 3. | The system shall allow OREDA to define and manage vendor allocation, equipment, and budget, to ensure optimal deployment and utilization. |
| FR 4. | The system should include financial tracking features to monitor project budgets, payments, and financial compliance throughout the life cycle of the project. |

### 3.1.6 Development of Mobile app

The Service Provider shall design, develop, and deploy a mobile application to facilitate the management and monitoring of renewable energy assets, vendor performance, and citizen interactions within the scope of OREDA's projects. The app will enable vendors, users (citizens), and OREDA officials to access key features, track progress, and engage with services efficiently. The mobile app should include the following features:

**For Vendors:**

- **Vendor Dashboard:** A dedicated dashboard for vendors to view the status of renewable energy projects, including asset installation, performance, and maintenance schedules.
- **Progress Tracking:** Allow vendors to update the status of ongoing projects, including project milestones, completed work, and pending tasks.
- **Feedback and Issue Reporting:** Enable vendors to log issues, raise concerns, and report problems related to asset installation or maintenance directly via the app.
- **Work Order Management:** Facilitate the creation, tracking, and closure of work orders related to asset management, ensuring timely completion and updates.

**For Users:**

- **Project Status Tracking:** Allow users to check the status of renewable energy projects (solar, wind, etc.) in their area, including real-time progress updates and completion timelines.
- **Feedback Submission:** Enable citizens to provide feedback on the performance of renewable energy systems, including service quality and system performance.
- **Grievance Registration:** Allow users to submit complaints or report issues related to energy projects, with options for uploading images, videos, or providing detailed descriptions of the problem.
- **Real-Time Notifications:** Users should receive notifications regarding updates on their complaints, project statuses, or any system issues.

**Develop a Mobile-based dashboard for officials and administrators to:**

  - View consolidated reports and analytical insights.
  - Monitor Project status energy usage and many other things also.
  - Manage and allocate tasks to Vendors.
  - Generate reports.
- Integrate analytical tools to process and analyze field data for:
  - Identifying trends and patterns in citizen issues and grievances.
  - Evaluating the progress of schemes and projects.
  - Generating automated and customizable reports for decision-making.
- Enable visualization through charts and graphs for actionable insights.
- The mobile app should be developed for Android platform

## 3.2 CONTACT CENTRE SOLUTION

### 3.2.1 Call Recording

The solution must have facility of recording the calls on real time basis. The recorded voice files must be encrypted to avoid any tampering. The detailed specification is given below table.

| Sl# | Functional Specification |
|---|---|
| FR 1. | Should use the recording interface provided by ACD or PBX API |
| FR 2. | Should provide 100% voice call recordings for inbound & outbound calls. |
| FR 3. | Should provide a single license that can support recording on all IP Phones. |
| FR 4. | Should be able to record calls coming on any type of trunk line like PRI/IP and system should also record internal calls. |
| FR 5. | Should be able to record IP endpoints |
| FR 6. | Should support SIP or IP or TDM (Time Division Multiplexing) endpoints |
| FR 7. | Should support for search and replay of calls |
| FR 8. | Should have Rules-based storage and recording |
| FR 9. | Should be able to "Tag" or classify calls with user-defined labels for simplified search and replay |
| FR 10. | Should be able to provide online, and offline storage capability in any combination. |
| FR 11. | Should have an open storage platform that can provide instant access to call recording in the storage. |
| FR 12. | Should provide facility to store voice digitally in central database or to a hierarchical file system in any of the standard format like wav, mp3 etc. |
| FR 13. | Provision for archival to network attached storage or network drive should be included as a standard component with the recording platform |
| FR 14. | Should be provided in high availability configuration |

### 3.2.2 IVRS (Interactive Voice Response Solution)

IVR shall be used during Out-bound calls to distribute communications to citizens. The IVR system should enable to make agentless outbound calls and blast calls to citizens. The detailed specification is given below table.

| Sl# | Functional Specification |
|---|---|
| FR 1. | Provision for receiving all inbound calls on the toll-free telephone number |
| FR 2. | Provision for identifying customer through command line interface (CLI) and support intelligent call routing. |

| Sl# | Functional Specification |
|---|---|
| FR 3. | Provision for calling on identified numbers for outbound calls. |
| FR 4. | The system should flexible enough to configure speech recognition engine in order to support and interpret multiple languages, especially English and Hindi in Future |
| FR 5. | Provision for Text-to-speech capability support for English and Hindi. |
| FR 6. | Should be an easy to configure system that enables the users to change the IVR tree with no hard coding. |
| FR 7. | Should support messages scheduling |
| FR 8. | Should support Outbound blast of Voice (pre-recorded or text to speech), email or SMS messages |
| FR 9. | Should support running multiple campaigns at the same time |
| FR 10. | Provision for capturing usage details of each citizen as the citizen traverses through a call. The IVR solution will have an interface through which usage details can be shared with other solutions. |
| FR 11. | Provision for integration with the rest of the proposed solution using web services / rest APIs to provide seamless Contact Centre performance. |

### 3.2.3 ACD (Automatic Call Distribution)

The Automatic Call Distributor shall be capable of handling high call volumes and distributing the calls amongst the CCEs. ACD shall support relaying of the information messages (marketing messages) to voice callers waiting in queues or on hold. It shall support Skill based routing with standard features like Call Transfer, Conference, Barge in, Dialed Number Identification Sequence (DNIS), Automatic Number Identification (ANI), Caller Line Identification (CLI), etc.

The detailed specification is given below table.

| Sl# | Functional Specification |
|---|---|
| FR 1. | Should be capable to identify User availability and route the call to the identified executive. |
| FR 2. | Should be able to handle call & IP Phone as per capacity defined in scope |
| FR 3. | Should support skill base routing, multiple group support, priority handling and Queue status indicator. |
| FR 4. | Should have capability to distribute the calls based on Skill level of the user like efficiency of the user and work load |
| FR 5. | Should have Least Occupied User details |
| FR 6. | Should have functionality where Supervisor can observe the executive pattern or silently monitor the executive. |
| FR 7. | Should have functionality to provide best service to the caller like listen only, listen and talk only etc. |

| Sl# | Functional Specification |
|---|---|
| FR 8. | Should allow comparing specified skills, identifying the skill that will provide the best service to a call, and deliver the call to that resource. If no executives are currently available, the call is queued. |
| FR 9. | Should have expected Time for waiting in routing |
| FR 10. | Should support load balancing of all calls |
| FR 11. | Should support for multiple announcements be played to a caller on queue. |
| FR 12. | Should redirect unanswered calls. |
| FR 13. | Should provide interface to signal call release, call hold, requests from call takers |
| FR 14. | Should allow a call facility for executives. If a call taker enters clerical mode that will be signaled to ACD and call will not be routed to that executive until it becomes free. |
| FR 15. | Should be able to block nuisance callers against list of numbers captured in master database until either number is removed from the master database of nuisance callers. |
| FR 16. | Should allow non-voice communication channel like email, web chat and SMS to be routed to agent based on skill set and agent availability. |
| FR 17. | Automatic Call back: The automatic call back function should enable calling back the missed calls or abandon calls which may be received on the system. It has to work in conjunction with the ACD as well. |
| FR 18. | Should be deployed in High availability |

### 3.2.4 Outbound Dialer

Outbound Dialers shall enable the CCEs to place outbound calls to customer for collecting feedback. It shall also facilitate conference calls between the customer, vendor and Identified OREDA Authority as and when required. The detailed specification is given below table.

| Sl# | Functional Specification |
|---|---|
| FR 1. | Should support outbound preview dialing, either automated or user-initiated |
| FR 2. | Should provide campaign management tool for supervisors to manage the campaigns |
| FR 3. | Should have the capability to fetch missed calls data from the ACD and dial out whenever the executive is available |
| FR 4. | Should be able to perform a screen pop with caller information based on the campaign |
| FR 5. | Should support campaign management for data selection. |
| FR 6. | Should support Do not call list. |
| FR 7. | Should support agentless dialing. |

## 3.3 CONTACT CENTRE INFRASTRUCTURE

The bidder will setup a 2-seater contact Centre at OREDA Premises only, all the cost related to Contact Centre will borne by Service Provider and OREDA will only provide the toll-free number and an Internet connectivity. The contact center will be operational from 10 AM to 6 PM on all working days. The space for call Centre will be provided by OREDA. Computer for the resources to be provided by OREDA.

## 3.4 CONTACT CENTRE MANAGEMENT

### 3.4.1 Inbound Call Management

a) Receive calls from the citizen
b) Provide relevant information to the citizens if available or may inform about the source from where the information can be availed
c) Reply to inbound emails received
d) Register the feedback received from the citizens through mails and voice calls
e) Update status of a particular complaints
f) Generate required reports and submit the same to the concerned authority
g) Interacting with citizens through Voice calls

### 3.4.2 Outbound Call Management

a) Receive request from official for outbound calls
b) Initiate calls to citizens through randomization logic
c) Capture citizens' feedback on a particular service availed by them on the CRM
d) Bridge calls between Department and respective citizens as and when needed
e) Update status of a particular feedback
f) Support data analytic services (if required)
g) Generate required reports and submit the same to the concerned authority

### 3.4.3 Operation Management

a) Deploy Contact Centre Executive for managing the contact centre operation
b) Increase or decrease the capacity of the resources for providing the required service as per the need of the client.
c) Contact Centre operation will be from 7:00 AM to 7.00 PM (IST) on all days (including holidays and Sundays).

d) Outbound call shall be done in business hours. For inbound calls in non-business hour the caller would be notified about the operation timing through Interactive Voice Response system.
e) Provide required information to OREDA officials ensuring quality of services rendered by the CCEs.
f) Impart regular training in soft skills; call handling, exposure to related application for preparing the CCE to answer different types of queries, or provide information as made available by the department.

## 3.5 UNIFIED CALL CENTER MANAGEMENT VIA CRM

The CRM system will serve as the operational backbone of the call center, integrating feedback processes and enabling efficient tracking and resolution. Key features include:

- **Omni-Channel Communication:**
    - Integration of voice calls, emails, SMS, WhatsApp, social media, and web portals for a seamless citizen experience.
    - Unified platform for managing all interactions in one place, ensuring no feedback is missed.
- **Agent Tools:**
    - Unified agent desktop providing comprehensive caller data, call history, and ticket information.
    - Auto dialers for outbound campaigns to streamline feedback collection and outreach efforts.
- **Ticketing System:**
    - Feedback and complaints automatically converted into tickets with unique reference numbers.
    - Tickets categorized by priority and urgency, routed to appropriate departments with automated SLA tracking
- **Notification and Escalation:**
    - Automated notifications to citizens for ticket creation, status updates, and resolution outcomes.
    - Predefined workflows for escalation and SLA monitoring to ensure timely issue resolution.

## 3.6 DATA ANALYTICS & QUALITY MONITORING

### 3.6.1 Data Analytics

Data Analytics To ensure the effective management and optimization of renewable energy assets, OREDA's data analytics and monitoring system will focus on analyzing asset performance, vendor management, citizen feedback, and grievance resolution. A combination of On-Site and Off-Site Teams, including subject matter experts (SMEs) and system coordinators, will be deployed for this purpose. Data Analytics services will encompass the following activities:

a) Define Standard Operating Procedures (SOPs) for asset management, vendor management, and grievance resolution to standardize operations and optimize performance.

b) Generating Live Cross-Channel Insight Reports to analyze asset performance, vendor progress, and citizen feedback across various platforms (SMS, mobile apps, web portal, etc.). These reports will allow for the identification of issues in real-time and the opportunity for immediate corrective action.

c) Error Rectification and Content Management: Ensuring that all reports and data are accurate, and any errors in the content or features of the platform are promptly rectified.

d) Operations & Monitoring of the Data Infrastructure: Regular monitoring, maintenance, and optimization of the database and data flow to ensure high efficiency in tracking and reporting renewable energy projects and initiatives.

e) Evaluation of Renewable Energy Projects: Analyze feedback from citizens and stakeholders regarding renewable energy assets, schemes, and policies. This includes assessments of asset performance, vendor services, and the public's satisfaction with the implementation of renewable energy solutions.

### 3.6.2 Quality Monitoring

a) Do sample survey of calls on Call Quality

b) Facilitate OREDA officials to listen to any calls at any point of time and give access to relevant sub-systems/servers (including IVR, ACD, security measures including data & software backups, firewalls, antivirus software updates, etc. related to Contact Centre Setup)

c) Generate reports including those required for cross-verification of SLAs regarding calls and quality.

## 3.7 PROJECT TIMELINE

T- Issuance of Work Order/Purchase Order

| *Sl#* | *Activity* | *Tentative Deliverables* | *Timeline* |
|---|---|---|---|
| a) | System Study & Prototype Design | – Detailed Team Structure with team members<br>– Point of Contact (SPOC)<br>– FSR/SRS Document<br>– Screenshot of prototypes | T+4 Weeks |
| b) | Support Centre Setup and Go-Live | – Procurement and installation of associated hardware and software<br>– Support center resource recruitment<br>– Commissioning of the call center | T+10 Weeks |
| c) | Design, Development & Implementation | – Source Code<br>– Test Plans & Test Cases<br>– Operation Manual<br>– FAQs<br>– Load Testing report<br>– Hosting in a staging environment | T+20 Weeks |
| d) | UAT, Training & Go-Live | – Preparation Test Cases<br>– UAT certificate<br>– Training to users, and provide training completion report.<br>– Movement of application from Staging to the Production environment<br>– Safe to host certificate issued by Cert-in empaneled firm | T+ 24 Weeks |
| e) | Operation & Maintenance of Software | – Issue Logs<br>– Quarterly Activities report | Three years from the date of Go-Live |
| f) | Help desk | – Monthly Attendance Sheet | Three years from the date of Go-Live |

## 3.8 SERVICE LEVEL & PENALTY

The Service Provider shall agree to the following service level agreement (SLA) parameters while providing Contact Centre services. These SLAs shall be tracked on a periodic basis and are envisaged to have penalty and/or liquidation damage clauses on non-adherence to any of them. The Service Provider has to provide the SLA tool which will facilitate generating the SLA reports. The SLA parameters are divided into 2 (two) types: -

### 3.8.1 During implementation

In case of delay in implementation of the project as per the Delivery Schedule mentioned in the RFP/ PO/ Agreement, penalties shall be imposed as mentioned below:

a) In the event of delay in execution of work, specified in this Contract /furnishing of deliverables, the Service Provider shall be liable to a penalty @ 0.25% of the value of work order for the respective component/item, for delay of 15 days or part thereof, up to a maximum of 10%, after which OCAC shall be at liberty to take action against the Service Provider as deemed proper (such as cancellation of order forfeiting of Performance Guarantee., increase of penalty percentage etc.)
b) Penalty will not be applicable, if the delay is not attributable to the SI. However, in such cases, the Service Provider has to communicate in writing the reason of delay. The decision of the Chairman, OCAC in this regard shall be final.

### 3.8.2 Post Implementation

**a) Solution Uptime**

The solution uptime shall be based on the overall performance of the hardware, application software, system software, where the uptime represents the percentage of time the system remains operational.

The uptime shall be calculated as follows:
Total uptime in minutes*100/ Total minutes of operations in a month.

| Measurement Interval | Reporting Period | Target | Penalty |
|---|---|---|---|
| Daily | Monthly | >=99.5% | Nil |
| | | >=98.7% but <99.5% | 0.5% of Quarterly billed value |
| | | >=97% but <98.7% | 1.0% of Quarterly billed value |
| | | >=95% but <97 % | 1.5% of Quarterly billed value |
| | | <95 % | 2.0% of Quarterly billed value |

**b) Inbound/ Outbound call**

This is defined as the percentage of time a CCE is productive for Contact Centre against the total duration he/ she is connected using his/her login ID to the Contact Centre's Automatic Call Distribution (ACD) system.

This shall be calculated as follows:
(Productive Auxiliary Time - Non-Productive Auxiliary Time} *100 / Total Staffed Time)

Note:
"Productive Auxiliary time" is length of time spent by a CCE on briefing, outbound call, feedback, support and on-job training.
Any Time other than "Productive Auxiliary time" shall be considered as Non-Productive Auxiliary time.
"Staffed time" is length of time spent by a CCE connected using his/her login ID to Automatic Call Distribution (ACD) system in any mode pre-defined in Automatic Call Distribution (ACD) system.

| Measurement Interval | Reporting Period | Target | Penalty |
|---|---|---|---|
| Daily | Monthly | >=80% | Nil |
| | | >=75% & <80% | 0.5% of Quarterly billed value |
| | | >=70% & <75% | 1% of Quarterly billed value |
| | | <70 % | 1.5% of Quarterly billed value |

**c) Average Update Time**

This is applicable for Inbound/Outbound Voice calls.

This shall be calculated as follows:

Total calls registered or made or answered*100/ Total Successful calls

| Measurement Interval | Reporting Period | Target | Penalty |
|---|---|---|---|
| Daily | Monthly | >=95% Records | Nil |
| | | >=90% and <=95% Records | 0.5% of Quarterly billed value |
| | | >=80% and <=90% Records | 1% of Quarterly billed value |
| | | <80 % Records | 1.5% of Quarterly billed value |

### d) Reporting Procedures of SLA

The SI's representative will prepare and distribute Service level performance reports in a mutually agreed format by the 10th working day of the completion of each month. The reports will include "actual versus target" Service Level Performance, a variance analysis and discussion of appropriate issues or significant events. Performance reports will be distributed to Purchaser management personnel as directed by Purchaser. Discrepancies in the service levels shall be monitored as per Escalation matrix given below.

**Escalation Matrix for Contact Centre**

| Sl# | Designation | Position in escalation matrix (L1/L2/L3) | Escalation Time/ Period |
|---|---|---|---|
| a) | Floor Manager- | L1 | Escalation In case of Call issue at the Contact Centre (inbound) |
| b) | Project Leader | L2 | Escalation In case of Call issue at the Contact Centre (outbound) |
| c) | Service Delivery Head | L3 | Escalation time period after 1 day in case of issue with Call and Contact centre management and resources management |

**Escalation Matrix for Portal**

| Sl# | Designation | Position in escalation matrix (L1/L2/L3) | Escalation Time/ Period |
|---|---|---|---|
| a) | Executive | L1 | Escalation time period in case of issue with the application management, Quality Analysis & Reporting |
| b) | Onsite Manager | L2 | Escalation time period after 2 days in case of issue with application Quality Analysis and Reporting |
| c) | Project Manager | L3 | Escalation time period after 3 days in case of issue with application Quality Analysis and Reporting |

## 3.9 PAYMENT TERMS

| SL# | CATEGORY/ACTIVITIES | PAYMENT TERM |
|---|---|---|
| 1. | Application Design, Development, Integration and Implementation. | • 20% of application development cost on approval of SRS.<br>• 40% of application development cost on approval of UAT.<br>• 30% of application development cost after declaration of Go-Live by OCAC/User Department.<br>• 10% After 6 months from the date of successful Go-live. |
| 3. | Application Support and Software Maintenance for a period of three year. | QGR Payment. To be paid in 12 Installment on submission of quarterly status report. |
| 4. | SSL Certificate | 100% of the cost shall be paid after configuration of SSL in the Live Web application |
| 5. | Third Party Security Audit | 100% of the cost shall be paid on submission of Safe-to-Host certificate |
| 6 | Change request Cost | 100% of approved cost after approval and incorporation. |
| 7 | (Infrastructure, IT/ITES Component, Solution) | 100% of the contract value (Infra Component) on delivery and installation of items. |
| 8 | Manpower Cost (Call Center Executive, Supervisor) | Quarterly payment based on the submission of Invoice, attendance report and Quarterly agent wise call handling summery. |

### 3.9.1 General Conditions

a) Payment schedule - Payments to the bidder/authorized partner, after successful completion of the target milestones (including specified project deliverables), would be made as under: -

b) The supplier's selected bidder's request for payment shall be made to the purchaser in writing, accompanied by invoices describing, as appropriate, the goods delivered and related services performed, and by the required documents submitted pursuant to general conditions of the contract and upon fulfillment of all the obligations stipulated in the Contract.

c) Cost of manpower will be released as per actual deployment and number of days reported

d) Due payments shall be made promptly by the purchaser, generally within thirty (30) days after submission of an invoice or request for payment by the supplier/ selected bidder/authorized partner, and the purchaser has accepted it.

e) The currency or currencies in which payments shall be made to the supplier/ selected bidder under this Contract shall be Indian Rupees (INR) only.

f) All remittance charges will be borne by the supplier/ selected bidder/authorized partner.

g) In case of disputed items, the disputed amount shall be withheld and will be paid only after settlement of the dispute.

h) Payment in case of those goods which need testing shall be made only when such tests have been carried out, test results received conforming to the prescribed specification.

i) Any penalties/ liquidated damages, as applicable, for delay and non-performance, as mentioned in this bidding document, will be deducted from the payments for the respective milestones.

j) Taxes, as applicable, will be deducted/ paid, as per the prevalent rules and regulations at the time of billing. Legitimate payment shall be made within 30 working days of the receipt of invoice along with supporting documents subject to penalties, if any.

## 3.10 SLA MANAGEMENT AND REPORTING

Service Level Agreements (SLAs) ensure operational efficiency and accountability. Key elements include:

- **Custom SLAs:**
  - Defined response and resolution times based on case type and priority.
- **SLA Monitoring:**
  - Real-time tracking with automated alerts for potential or actual breaches.
- **Performance Reports:**
  - Detailed SLA adherence reports highlighting bottlenecks and areas for improvement.

### 3.11 Training and Knowledge Management

- **Knowledge Base:**
  - Central repository of FAQs, troubleshooting guides, and service protocols accessible to agents in real-time.
- **Agent Training:**
  - Comprehensive onboarding and regular refresher programs covering CRM usage, communication skills, and problem-solving.

### 3.12 Performance Monitoring

- **Real-Time Dashboards:**
  - Supervisors can monitor key performance indicators such as call wait times, resolution rates, and agent efficiency.
- **Custom Reports:**
  - Tailored reports for analyzing operational trends and identifying areas for optimization.

## 4 Technical Requirements

| Sl# | Technical Specification – Platform Features |
|---|---|
| TR 1. | It must provide a user-friendly, customizable dashboard for analytics, reporting, and performance monitoring. |
| TR 2. | It should enable the addition of multiple user accounts with granular, role-based permissions. |
| TR 3. | The platform should provide a mobile app for OREDA officials and other users. |
| TR 4. | It should enable custom dashboards and deliver push notifications for updates. |
| TR 5. | The Contractor should provide training and support during implementation |
| TR 6. | The implementation team must be based in India, ensuring close collaboration with OREDA. |
| TR 7. | The Contractor should facilitate smooth data migration during provider transitions, ensuring no loss of logs, data, or masters. |
| TR 8. | The Contractor should provide a mobile app for government officials to view real-time survey data and insights. |
| TR 9. | The Contractor should enable users to customize dashboards for their specific needs, such as monitoring district-wise performance or citizen sentiment. |
| TR 10. | The Contractor should deliver notifications for key updates. |
| TR 11. | The Platform should ensure encryption for data at rest and in transit to protect sensitive information. |
| TR 12. | The Platform should Comply with data protection regulations, including GDPR, CCPA, and applicable national standards. |