

**Request for quotation (RFQ)**

## Request for quotation for the Provision of

A Careers Service Management Solution

**To be supplied to the University of London**

|  |  |
| --- | --- |
| Project | *A Careers Service Management Solution* |
| RFQ Release Date | 7th June 2019 |
| Issuer | Tina Pask |
| Tenderer Response Date | 1st July 2019 |

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These limitations are not intended to restrict continuing business discussions between University of London and the Supplier.

Any proposal received byUniversity of London is subject to contract.

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# Section A - Introduction and Overview

# Introduction

**University of London (UoL) Background**

* 1. **The University of London is a federal University and is one of the oldest, largest and most diverse universities in the UK (it was granted its first charter in 1836). The teaching is carried by the 19 Colleges and Institutes that comprise the University.** Between the Colleges and Institutes we have over 120,000 students studying over 3700 courses. Not all of our students are actually located in London either: some study at the University of London Institute in Paris and we have over 50,000 students studying by distance and flexible learning in 180 countries with the University of London International Programmes.
  2. Today – as it has been throughout its long history – the University is a family of world-class

institutions, collectively upholding its international reputation of academic distinction in teaching and research.  Its degrees have always been awarded without discrimination on religious, social or sexual grounds. The outstanding achievements of the Colleges and Institutes mean that the University of London degree continues to be internationally recognised for its quality and excellence.

The Careers Group, University of London is one of the oldest and largest higher education careers services is the UK, recognised as a centre of excellence in relation to careers and employability support for HE students and graduates. The Careers Group is a membership organisation consisting of a range of higher education Careers Services supported by a small central team within the University of London. Many of our colleagues are based permanently in colleges, working in university careers service alongside locally employed careers and employability staff.

The Careers Group exists to ensure that each member Careers Service is the best it can be strategically and operationally, benefitting fully from the collaborative activities of The Careers Group whilst also ensuring that it maximises its unique institutional offering. The Careers Group also strives to be a thought and practice leader within the sector, focused on evidence-based innovation within the employability landscape.

The following university Careers Services are full members of The Careers Group:

•​​City Careers Service

•Goldsmiths Careers Service​

•King’s College London Careers & Employability Service

•Queen Mary Careers & Enterprise Service

•Royal Holloway Careers & Employability Service

•SOAS Careers

•St Mary’s University Careers Service

•University College London

Specialist institutions of The University of London:

•The Courtauld Institute of Art

•Heythrop College

•St George’s University of London

•School of Advanced Study, University of London

•The London School of Hygiene & Tropical Medicine

•The Royal Veterinary College

For the avoidance of doubt, where this RFQ refers to UoL or their advisers and representatives this includes all the members of TCG listed above.

* 1. *Additional general information about UoL can be found at* [*www.london.ac.uk*](http://www.london.ac.uk)
  2. **Project Background**

The Careers Group (TCG) are tendering for a Careers Service Administration & Management System (CSMS) used by the central team & member Services. TCG are at the forefront of Careers service provision and are looking for a system that allows a highly customised experience for each student/graduate based on their circumstances, preferences and data gathered from similar profile clients, underpinned by AI and advanced interfaces. The aim is to improve the chances of students & graduates securing relevant employment and ultimately improve the graduate outcome & our member colleges’ positions in league tables.

# Overview

2.1 The UoL has issued this RFQ to a selection of suppliers and expects to trade using its own terms and conditions.

2.2 You are invited to submit your proposal for these services in accordance with this RFQ.

* 1. Section B contains the Instructions to Supplier and the conditions of this RFQ.

2.4 Prior to commencing formal evaluation, supplier responses will be checked to ensure they are fully compliant with the conditions of RFQ. Non-compliant responses may be rejected by the University of London. Responses which are deemed by the University of London to be fully compliant will proceed to evaluation. These will be evaluated using the evaluation criteria and weightings detailed in Table 3 of Section C.

2.5 Following evaluation of the compliant quotes and approval of the outcome the University of London intends to appoint a single Supplier to enter into a Contract. However, the University of London reserves the right not to award a Contract as a result of the current procurement process.

# Section B – Instructions to Suppliers

# 1 General Instructions

These instructions are designed to ensure that all suppliers are given equal and fair consideration. It is important therefore that you provide all the information asked for in the format and order specified. Please contact the University of London Representative – Tina Pask, Head of ICT Supply Chain and Vendor Management, ICT, Senate House, Malet Street, London WC1E 7HU, [ICT.office@london.ac.uk](mailto:ICT.office@london.ac.uk) if you have any doubt as to what is required or will have difficulty in providing the information requested.

Suppliers should read these instructions carefully before completing the RFQ documentation. Failure to comply with these requirements for completion and submission of the RFQ Response may result in the rejection of the quote.

All material issued in connection with this RFQ shall remain the property of the University of London and shall be used only for the purpose of this procurement exercise. Any due diligence or other information issued to suppliers shall be either returned to the University of London or securely destroyed by the supplier (at the University of London’s option) at the conclusion of the procurement exercise.

The supplier shall nominate a Lead supplier and single point of contact, and ensure that each and every sub-contractor, consortium member and adviser abides by the terms of these instructions.

The supplier shall not make contact with any other employee, agent or consultant of the University of London who are in any way connected with this procurement exercise during the period of this procurement exercise, unless instructed otherwise by the University of London Representative.

The University of London shall not be committed to any course of action as a result of:

* + - * issuing this RFQ or any invitation to participate in this procurement exercise;
      * an invitation to submit any response in respect of this procurement exercise;
      * communicating with a supplier or a supplier’s representatives or agents in respect of this procurement exercise; or
      * any other communication between the University of London (whether directly or by its agents or representatives) and any other party.

The University of London reserves the right to amend, add to or withdraw all or any part of this RFQ at any time during the procurement exercise. Notification of such an event will be provided to all suppliers.

# **2** **Site Visits**

Not required

3 Confidentiality

3.1 Subject to the exceptions referred to in paragraph 3.2, the contents of this RFQ are being made available by the University of London on condition that:

* + 1. Suppliers shall at all times treat the contents of the RFQ and any related documents (together called the ‘Information’) as confidential, save in so far as they are already in the public domain;
    2. Suppliers shall not disclose, copy, reproduce, distribute or pass any of the Information to any other person at any time or allow any of these things to happen;
    3. Suppliers shall not use any of the Information for any purpose other than for the purposes of submitting (or deciding whether to submit) a quote;

and

* + 1. Suppliers shall not undertake any publicity activity within any section of the media.
  1. Suppliers may disclose, distribute or pass any of the Information to the Supplier’s advisers, sub-contractors or to another person provided that either:
     1. This is done for the sole purpose of enabling a quote to be submitted and the person receiving the Information undertakes in writing to keep the Information confidential on the same terms as if that person were the Supplier; or
     2. The Supplier obtains the prior written consent of the University of London in relation to such disclosure, distribution or passing of Information; or
     3. The disclosure is made for the sole purpose of obtaining legal advice from external lawyers in relation to the procurement or to any Contract arising from it; or
     4. The Supplier is legally required to make such a disclosure
  2. In paragraphs 3.1 and 3.2 above the definition of ‘person’ includes but is not limited to any person, firm, body or association, corporate or incorporate.

3.4 The University of London may disclose detailed information relating to Suppliers to its officers, employees, agents or advisers and the University of London may make any of the Contract documents available for private inspection by its officers, employees, agents or advisers. The University of London also reserves the right to disseminate information that is materially relevant to the procurement to all Suppliers, even if the information has only been requested by one Supplier, subject to the duty to protect each Supplier's commercial confidentiality in relation to its quote (unless there is a requirement for disclosure under the Freedom of Information Act, as explained in paragraphs 4.1 to 4.3 below).

4 Freedom of Information

4.1 In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the ‘FoIA’), the University of London may, acting in accordance with the Secretary of State’s Code of Practice on the Discharge of the Functions of Public Authorities under Part 1 of the said Act, or the EIR be required to disclose information submitted by the Supplier to the University of London.

* 1. In respect of any information submitted by a Supplier that it considers to be commercially sensitive the Supplier should:

4.2.1 Clearly identify such information as commercially sensitive;

4.2.2 Explain the potential implications of disclosure of such information; and

4.2.3 provide an estimate of the period of time during which the Supplier believes that such information will remain commercially sensitive.

4.3 Where a Supplier identifies information as commercially sensitive, the University of London will endeavour to maintain confidentiality. Suppliers should note, however, that, even where information is identified as commercially sensitive, the University of London may be required to disclose such information in accordance with the FoIA or the Environmental Information Regulations. In particular, the University of London is required to form an independent judgment concerning whether the information is exempt from disclosure under the FoIA or the EIR and whether the public interest favours disclosure or not. Accordingly, the University of London cannot guarantee that any information marked ‘confidential’ or “commercially sensitive” will not be disclosed.

4.4 Where a Supplier receives a request for information under the FoIA or the EIR during the procurement process, this should be immediately passed on to the University of London and the Supplier should not attempt to answer the request without first consulting with the University of London.

5 Quote Validity

5.1 Your quote should remain open for acceptance for a period of 90days. A quote valid for a shorter period may be rejected.

6 Timescales

6.1 Set out below is the proposed procurement timetable. This is intended as a guide and whilst the University of London does not intend to depart from the timetable it reserves the right to do so at any stage.

|  |  |
| --- | --- |
| **TABLE 1: PROCUREMENT TIMETABLE** | |
| **DATE** | **STAGE** |
| 07/06/2019 | RFQ to be issued via ContractsFinder by the University of London |
| 07/06/2019 | Clarification period opens |
| 24/06/2019 | Deadline for Suppliers to confirm receipt of RFQ via email and confirm intention to submit a response |
| 27/06/2019 | Clarification period closes |
| 01/07/2019 | Closing date and time for receipt by the University of London of Supplier Responses to the RFQ |
| 01/07/2019 | Evaluation of RFQ Responses commences |
| w/c 15/07/2019 | Supplier shortlisting |
| w/c 22/07/2019 | Supplier presentations |
| Until 16/08/2019 | RFQ recommendation and internal approval / governance |
| w/c 19/08/2019 | Award of Contract and Letters to Unsuccessful Suppliers |
| w/c 19/08/2019 | Debriefing of Unsuccessful Suppliers on request |
| w/c 26/08/2019 | Commencement Date of Contract |
| w/c 26/08/2019 | Implementation of works/services etc |

Table 1 – Procurement Timetable

7 University of London Contact Details

* 1. Unless stated otherwise in these Instructions or in writing from the University of London, all communications from suppliers (including their sub-contractors, consortium members, consultants and advisers) during the period of this procurement exercise must be directed to the designated University of London Representative named in paragraph 1.1 above.
  2. All communications (other than the RFQ Response) should be clearly headed RFQ forTina Pask and include the name, contact details and position of the person making the communication.
  3. Requests for quote clarifications must be submitted in accordance with the procedure set out in Section B paragraph 16 – Queries Relating to RFQ.

8 Intention to Submit a quote

8.1 Suppliers must acknowledge receipt of the RFQ documentation and indicate whether they intend to submit a quote to the University of London Representative at the email address provided at Section B paragraph 1.1 above no later than 24/06/2019.

8.2 In the event that a Supplier does not wish to participate further in this procurement exercise, the Supplier should advise the University of London Representative at the email address provided at Section B paragraph 1.1

9 Preparation of Quote

9.1 Suppliers must obtain for themselves at their own responsibility and expense all information necessary for the preparation of quotes. Suppliers are solely responsible for the costs and expenses incurred in connection with the preparation and submission of their quote and all other stages of the procurement process. Under no circumstances will the University of London, or any of their advisers, be liable for any costs or expenses borne by Suppliers, sub-contractors, or advisers in this process.

9.2 Suppliers are required to complete and provide all information required by the University of London in accordance with the RFQ. Failure to comply may lead the University of London to reject a quote Response.

9.3 The University of London relies on Suppliers' own analysis and review of information provided. Consequently, Suppliers are solely responsible for obtaining the information which they consider is necessary in order to make decisions regarding the content of their quotes and to undertake any investigations they consider necessary in order to verify any information provided to them during the procurement process. By submitting a response, Suppliers are committing to an understanding that they understand the requirement and have sufficiently addressed all aspects of the requirement and information provided and that they have checked all stated details, such as prices, to be correct and as intended at the time of submission.

9.4 Suppliers must form their own opinions, making such investigations and taking such advice (including professional advice) as is appropriate, regarding the RFQ requirementand their quotes, without reliance upon any opinion or other information provided by the University of London or their advisers and representatives. Suppliers should notify the University of London promptly of any perceived ambiguity, inconsistency or omission in this RFQ, any of its associated documents and/or any other information issued to them during the procurement process.

10 Submission of quotes

10.1 Suppliers must submit their quotes as per the instructions below or their quote maybe rejected.

10.2 The University of London may at its own absolute discretion extend the closing date and the time for receipt of quote.

* 1. Any extension granted under Section B paragraph 10.2 will apply to all Suppliers.
  2. Tenderers must submit one electronic **priced** copyof their quote to email address:

[ICT.office@london.ac.uk](mailto:ICT.office@london.ac.uk) by **12 noon 01/07/2019** (**“the Deadline”)**

10.5 The quote and any documents accompanying it must be in the English language.

10.6 Price and any financial data provided must be submitted in or converted into pounds sterling. Where official documents include financial data in a foreign currency, a sterling equivalent must be provided.

10.7 Quotes will be received any time up to the deadline stated above. Quotes received before this deadline will be unopened until the opening date.

10.8 The University of London does not accept responsibility for the premature opening or mishandling of quotes that are not submitted in accordance with these instructions.

11 Canvassing

11.1 Any Supplier who directly or indirectly canvasses any officer, member, employee, or agent of the University of London or its members, including other TCG members, concerning the establishment of the Contract or who directly or indirectly obtains or attempts to obtain information from any such officer, member, employee or agent or concerning any other Supplier, the RFQ or proposed Tender will be disqualified.

12 Disclaimers

12.1 Whilst the information in this RFQ, any due diligence information and supporting documents has been prepared in good faith, it does not purport to be comprehensive nor has it been independently verified.

12.2 Neither the University of London, nor their advisors, nor their respective directors, officers, members, partners, employees, other staff or agents:

makes any representation or warranty (express or implied) as to the accuracy, reasonableness or completeness of the RFQ; or

accepts any responsibility for the information contained in the RFQ or for their fairness, accuracy or completeness of that information nor shall any of them be liable for any loss or damage (other than in respect of fraudulent misrepresentation) arising as a result of reliance on such information or any subsequent communication.

12.3 Any persons considering making a decision to enter into contractual relationships with the University of London following receipt of the RFQ should make their own investigations and their own independent assessment of the University of London and its requirements for a careers service management solution and should seek their own professional financial and legal advice. For the avoidance of doubt the provision of clarification or further information in relation to the RFQ or any other associated documents (including the Schedules) is only authorised to be provided following a query made in accordance with paragraph 16 of this RFQ.

12.4 Any Contract awarded as a result of this RFQ shall be governed by English law.

13 Collusive Behaviour

13.1 Any Supplier who:

1. fixes or adjusts the amount of its quote by or in accordance with any agreement or arrangement with any other party; or
2. communicates to any party other than the University of London the amount or approximate amount of its proposed Quote or information which would enable the amount or approximate amount to be calculated (except where such disclosure is made in confidence in order to obtain quotations necessary for the preparation of the Quote or insurance or any necessary security); or
3. enters into any agreement or arrangement with any other party that such other party shall refrain from submitting a Quote; or
4. enters into any agreement or arrangement with any other party as to the amount of any Quote submitted; or
5. offers or agrees to pay or give or does pay or give any sum or sums of money, inducement or valuable consideration directly or indirectly to any party for doing or having done or causing or having caused to be done in relation to any other Quote or proposed Quote, any act or omission, shall (without prejudice to any other civil remedies available to the University of London and without prejudice to any criminal liability which such conduct by a Supplier may attract) be disqualified.

14 No Inducement or Incentive

14.1 The RFQ is issued on the basis that nothing contained in it shall constitute an inducement or incentive nor shall have in any other way persuaded a Supplier to submit a Quote or enter into the Contract or any other contractual agreement.

15 Acceptance and Award of Contract

15.1 The Supplier in submitting the Quote undertakes that in the event of the Quote being accepted by the University of London and the University of London confirming in writing such acceptance to the Supplier, the Supplier will within 7days of being called upon to do so by the University of London execute the proposed contract.

16 Queries Relating to RFQ

* 1. All requests for clarification about the requirements or the process of this procurement exercise shall be made in accordance with 16.3 of these Instructions.
  2. The University of London will endeavour to answer all questions as quickly as possible, but cannot guarantee a minimum response time. The University of London has designated a specific window of time to deal with clarification requests from Suppliers.
  3. Clarification requests can be submitted via e-mail only to Tina Pask, email: [ICT.office@london.ac.uk](mailto:ICT.office@london.ac.uk) from 07/06/2019.
  4. No further requests for clarifications will be accepted after 27/06/2019.
  5. In order to ensure equality of treatment of Suppliers, the University of London intends to publish the questions and clarifications raised by Suppliers together with the University of London’s responses (but not the source of the questions) to all participants on a regular basis.
  6. Suppliers should indicate if a query is of a commercially sensitive nature – where disclosure of such query and the answer would or would be likely to prejudice its commercial interests. However, if the University of London at its sole discretion does not either; consider the query to be of a commercially confidential nature or one which all Suppliers would potentially benefit from seeing both the query and University of London’s response, the University of London will:
     1. invite the Supplier submitting the query to either declassify the query and allow the query along with the University of London’s response to be circulated to all Suppliers; or
     2. request the Supplier, if it still considers the query to be of a commercially confidential nature, to withdraw the query.

16.7 The University of London reserves the right not to respond to a request for clarification or to circulate such a request where it considers that the answer to that request would or would be likely to prejudice its commercial interests.

17 Amendments to Quote Documents

* 1. At any time prior to the deadline for the receipt of Quotes, the University of London may modify the RFQ by amendment. Any such amendment will be sent to all prospective Suppliers by email and the University of London may, at its discretion, extend the Deadline for receipt of Quotes.

18 Late Quotes

18.1 Any Quote received after 12 noon on 01/07/2019 may be rejected.

19 Proposed Clarification Amendments to the Contract by the Tenderer

* 1. The University of London will not undertake negotiation of the Contract terms and conditions. However, amendments by Tenderers and/or the University of London to clarify its terms will be considered.
  2. The University of London will consider proposed clarification amendments strictly on their merits, and will not be obliged to accept any proposed clarification amendments.
  3. Any proposed clarification amendments to the Contract must be detailed separately on the Proposed Clarification Amendments form included at Schedule 8**,** and returned with the Tenderer’s ITT Response.
  4. On no account will Tenderer’s “Terms of Business” be accepted in lieu of the form of terms and conditions contained in the ITT. The successful Tenderer shall enter into a formal contract to provide a careers service management solution to the University of London in the form and in accordance with the terms and conditions set out in Section G of this RFQ.

20 Modification and Withdrawal

20.1 Suppliers may modify their Quote prior to the Deadline by giving notice to the University of London via electronic submission to the University of London Representative Tina Pask. No Quote may be modified subsequent to the Deadline for receipt, except where the Quote is found to be incorrect due to mathematical error (including clarification and subsequent correction of omissions or duplications) in the pricing information supplied by the bidder. In such instances bidders will be invited to agree to the correction of these mathematical errors. The method of correction will be by a written addendum to the Pricing Document. This addendum will then form part of the Contract.

* 1. Suppliers may withdraw their Quote at any time prior to the Deadline or any other time prior to accepting the offer of a Contract. The notice to withdraw the Quote must be in writing and sent to the University of London representative, Tina Pask.

21 Right to Reject/Disqualify

21.1 The University of London reserves the right to reject or disqualify a Supplier where:

1. the Supplier fails to comply fully with the requirements of this RFQ or is guilty of a serious misrepresentation in supplying any information required in this document; and/or
2. the Supplier is guilty of serious misrepresentation in relation to its Quote; and/or the Quote process; and/or
3. there is a change in identity, control, financial standing or other factor impacting on the selection and/or evaluation process affecting the Supplier.

22 Right to Cancel, Clarify or Vary the Process

22.1 The University of London reserves the right to:

1. amend the terms and conditions of the RFQ process,
2. cancel the evaluation process at any stage; and/or
3. require the Supplier to clarify its Quote in writing and/or provide additional information. (Failure to respond adequately may result in the Supplier not being selected),

23 Notification of Award

23.1 The University of London will notify the successful Supplier of their appointment in writing.

24 Debriefing

24.1 Following the conclusion of the Contract, all unsuccessful Suppliers will be afforded the opportunity of a debriefing. Unsuccessful Suppliers should notify the University of London in writing that they wish to be debriefed. The University of London will formally debrief the unsuccessful Supplier within 15 days of receiving such a request.

Section C – Evaluation Methodology

1 Introduction

1.1 The procurement process will be conducted to ensure that suppliers are evaluated fairly to ascertain the most economically advantageous quote.

2 RFQ Evaluation Criteria

2.1 Suppliers Response to the RFQ Questionnaire in Section E, together with pricing information provided in Section F will be evaluated against the criteria, shown in Table 3 below.

2.2 The successful supplier will be the one who, in the opinion of the University of London at the conclusion of the evaluation, offers the most economically advantageous quote.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **TABLE 3: EVALUATION CRITERIA FOR CONTRACT AWARD** | | |
| **CRITERION** | | **RFQ REFERENCE AS APPLICABLE** | **PERCENTAGE WEIGHTINGS or PASS/FAIL** |
| Section E Schedule 5 RFQ Questionnaire | | Section E | 60%  (To note this includes Pass/Fail of Essential requirements) |
| Price | | Section F | 40% |
| Supplier Information | | Section G | Pass / Fail |

3 Evaluation Process

3.1 The evaluation process will feature the following phases:

3.1.1 Phase 1 – Compliance Checks, receipt of quote within deadline is confirmed

3.1.2 Phase 2 – Evaluation and marking of quotes

3.1.3 Phase 3 – Moderation of Scores

3.1.4 Evaluation Report and Recommendation

3.1.5 Approvals

4 Award of Contract

4.1 The University of London will inform all suppliers in writing of the outcome including any intention to award a Contract.

4.2 Unsuccessful suppliers will be able to seek a debriefing in accordance with Section B paragraph 24.

Section D – Specification

**Project background and scope**:

The Careers Group (TCG) require a Careers Service Administration & Management System (CSMS) for the Central Team & member Services that meets the challenges of running the world’s largest HE Careers Service and helps achieve the aims of the Group’s strategy.

The system must allow the Central Team and each member Service to fully run and manage their prospective service as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| Team | Admin size | Students size | Function(s) summary |
| Central TCG Team | 20 staff in total | - | - Sharing organisation profiles and vacancies across the whole group  - Collating data and reporting on the performance and use of the CSMS across the whole group  - Central TCG Team with special permissions must be able to access & report on all the data from all CSMS instances across the group |
| Medium to Large members/colleges | 20-60 staff per college (7 colleges) | 6.5k-39k per college (133,000 in total) + graduates | - Advertising & managing job vacancies & internships  - Advertising and managing careers appointments  - Running & managing placements and awards  - Advertising and managing careers events  - Managing careers communications with students, graduates and organisations  - Managing organisation profiles and their organisational contacts  - Creating & collecting feedback on all client facing parts of the system and Careers-related surveys  - Careers resources management  - Handling careers-related payments  - Reporting on all aspects of the system  - College staff must only be able to access their college’s data and none of the other colleges.  - Each college must have its own local/separate instance with own branding that reflects that of the institution. |
| Small members/colleges | 20 staff in total | 500-5.5k per college (15,000 in total) + graduates | - Advertising & managing job vacancies & internships  - Advertising and managing careers appointments  - Advertising and managing careers events  - Managing careers communications with students, graduates and organisations  - Managing organisation profiles and their organisational contacts  - Reporting on all aspects of the system  - College staff must only be able to access their college’s data and none of the other colleges.  - Each college must have its own local/separate instance with own branding that reflects that of the institution. |

**Project timetable**:

**Phase One**:

Implementing the system for the central team, including the group-wide vacancies sharing & reporting functionalities, and a pilot group of members (2 colleges) in time for the 2020/21 academic year with a soft launch for employers in January 2020 and launching to students & graduates in June 2020. The pilot group will be 50,000 students, 50,000 graduates and 70 members of staff across the 2 pilot colleges. The system will require integrating with the existing CSMSs that are currently in use within the group to allow vacancies sharing and cross-group reporting.

**Phase Two**:

A group, or potentially all, of the remaining colleges will be part of phase two to move to the new CSMS in time for the 2021/22 academic year with a soft launch for employers in January 2021 and launching to students & graduates in June 2021.

**Phase Three**:

Any remain colleges that haven’t been part of previous 2 phases, will be part of this phase to move to the new CSMS in time for the 2022/23 academic year with a soft launch for employers in January 2022 and launching to students & graduates in June 2022.

**Project constraints**:

* Some colleges might not move to the new CSMS, or delay the move beyond the above 3 phases. The new CSMS will need to provision for this and the potential of integration with the existing CSMSs used across the group.
* During phases one and two, the group will be potentially running 3 different CSMSs simultaneously, supplier will need to come up with a solution to avoid staff having to enter the same information in 2-3 different CSMSs.

**Summary of Objectives**:

* To ensure that member College Careers Services have to a reliable state-of-the-art CSMS that uses the latest technology to deliver exceptional user experience to our clients.
* To improve staff efficiency in delivering career services in member colleges.
* To enable the central vacancies team to share vacancies across all member colleges.

Section E - RFQ Questionnaire

# 1 RFQ Questionnaire

1.1 Table 4 in Schedule 5 below sets out the University of London’s RFQ Questions relating to the requirements of this RFQ. Suppliers should complete their responses, noting any response requirements such as word limits.

1.2 Requirements marked as Essential are mandatory, solutions unable to meet the mandatory requirements will be disqualified.

1.3 Requirements marked as Desirable are optional, they will still be marked but failure to fulfil the requirement will not be exclusionary.

1.4 Suppliers are required to confirm in their responses to each question where relevent whether the functionality is Standard (out of the box) or whether that funtionality is Bespoke i.e. would need consultancy to achieve. Where functionality would be Bespoke suppliers are requested to give indicative costs for enabling the functionality.

1.5 For each Yes / No requirement please indicate whether your system is able to meet the requirement by marking the Yes box, or if unable to meet the requirement please mark the No box. Where your solution can meet the requirement but would need a work-around, code changes or bespoke changes etc please advise in the Comments box. Where a Yes is marked with no Comments then this is standard functionality, already within your solution and deliverable ‘out of the box’.

1.6 For the embedded PDF process maps, the colour legend is: Red is essential while blue is desirable. If there is a conflict between essential/desirable in the questionnaire and the process maps, then the essential/desirable in the questionnaire takes precendence.

Schedule 5: RFQ Questionnaire

Table 4

| **Ref** | **Requirement** | **Essential** | **Desirable** | **Yes** | **No** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- |
| R.1 | **Appointments** | | | | | |
| R.1.0 | Please see the following embedded PDF file for the appointments process. Please give a top level overview in the Comments section (the detail will be dealt within the subsequent questions) of how you solution will enable this process and highlight any unique features or benefits that your solution would bring to this process. | E |  |  |  |  |
| R.1.1 | Operators must be able to create different appointment types and set up different duration, advisers, location, description, medium (face to face, Skype or remote), restrictions for each | E |  |  |  |  |
| R.1.2 | Operators must be able to pre-set the medium for the appointment, e.g. Skype/Face to face, or set it as "any" | E |  |  |  |  |
| R.1.3 | CSMS should support the ability to allow students to select their preferred option in case of "any" |  | D |  |  |  |
| R.1.4 | Operators must be able to add student viewable description to each appointment type | E |  |  |  |  |
| R.1.5 | Operators must be able to create appointments that are drop in style where there is functionality for queue management | E |  |  |  |  |
| R.1.6 | Operators must be able to create referral only appointments that can only be viewed and booked by the students when they have been referred to it by the adviser or operator | E |  |  |  |  |
| R.1.7 | Operators should be able to set different types of appointments at the same location and time with the same adviser(s) but once one type is booked by the student, the rest would disappear |  | D |  |  |  |
| R.1.8 | Operators must be able to create a non-student bookable type of appointments for operators to use, e.g. only operators can view and book this type of appointment | E |  |  |  |  |
| R.1.9 | Operators must be able to restrict appointments to students by: course/degree, school / faculty, departments, student type (PGR, PGT, UG, Foundation, Post Docs, Graduates, Prospective),  additional student details (fee status: International / home / EU, WP, Disabled, Sandwich / gap year and gender), year of study, year of graduation, by student tag / label and by operator defined custom criteria | E |  |  |  |  |
| R.1.10 | Operators must be able to set the order of appearance for each appointment type, i.e. which should show up first |  | D |  |  |  |
| R.1.11 | Operators must be able to create restrictions for appointments by: Particular group of students / graduates, course / degree, school / faculty, department, student type: (PGR, PGT, UG, Foundation Post Docs, Graduates, Prospective), other student type: (international / home / EU, WP, disabled, sandwich / gap year, gender), year of study, year of graduation, by student tag / label, custom (operator defined), combination of groups, with and / or options, Career readiness, All apart from certain groups, or place no restrictions | E |  |  |  |  |
| R.1.12 | Operators must be able to restrict the number of bookings that a student can make over a set period of time | E |  |  |  |  |
| R.1.13 | Operators must be able to bulk schedule a series of appointments up to a certain date / number of appointments | E |  |  |  |  |
| R.1.14 | Operators must be able to schedule appointments that repeat on certain days and are one off | E |  |  |  |  |
| R.1.15 | Operators must be able to schedule appointments which generate a calendar appointment / invite as an in-system calendar and as an appointment invite to their email calendar i.e. as iCal) | E |  |  |  |  |
| R.1.16 | Operators must be able to schedule appointments which checks the location’s and the operator’s calendars for conflicts and warns the user of any conflicts | E |  |  |  |  |
| R.1.17 | Operators must be able to release appointments that release to the different groups on different dates /times |  | D |  |  |  |
| R.1.18 | Operators must be able to release appointments that release on a specific day, release X days before, release Y hours before, release the full week on a certain time, roll on release | E |  |  |  |  |
| R.1.19 | Operators must have the ability to assign an adviser(s) as the appointment owner(s) and to receive related notifications | E |  |  |  |  |
| R.1.20 | Operators must have the ability to set up a form that can recommend appointment types for the students to book based on their answers |  | D |  |  |  |
| R.1.21 | Operators must be able to modify appointments by time and date, location and adviser / consultant that sends an automatic calendar update to the existing calendar entries for the operator and the booked student | E |  |  |  |  |
| R.1.22 | Operators must be able to modify appointments by booked student (and see any key flags on that student), restrictions, release / hide | E |  |  |  |  |
| R.1.23 | Operators must be able to modify a series of appointments at the same time | E |  |  |  |  |
| R.1.24 | Operators must be able to delete one off appointments, bulk / series of appointments and send email alerts if students are booked into these appointments | E |  |  |  |  |
| R.1.25 | Operators must be able to view their own appointments and other appointments that are viewable by all advisers | E |  |  |  |  |
| R.1.26 | Operators must be able to view notes from advisers | E |  |  |  |  |
| R.1.27 | Operators with special permissions should be able to view ‘confidential’/restricted notes |  | D |  |  |  |
| R.1.28 | Operators must be able to have a calendar view of all appointments as long as the operator meets the viewing permissions | E |  |  |  |  |
| R.1.29 | Operators must be able to have a calendar view of all appointments which they can filter to see their own appointments, filter by certain adviser(s), filter by appointment type, filter by location | E |  |  |  |  |
| R.1.30 | Operators must be able to view a location's calendar of appointments | E |  |  |  |  |
| R.1.31 | For the above, where appointments that the operator doesn’t have permissions to see the appointment, it should be shown as ‘private’ on the calendar |  | D |  |  |  |
| R.1.32 | Operators must be able to contact the student/graduate via the CSMS regarding the appointment | E |  |  |  |  |
| R.1.33 | Operators must be able to manage the setting of booking criteria e.g. the student meeting certain prerequisites i.e. attended certain workshop or did X activity |  | D |  |  |  |
| R.1.34 | Operators must be able to manage the set up of pre-appointment booking custom forms, which include the ability to attach documents and to make the form / some of the questions compulsory | E |  |  |  |  |
| R.1.35 | Operators should be able to create drop in / queues with the ability to set the tile, set joining criteria / restrictions, use a default opening & closing time day of week, and set the queue opening and closing to these defaults or to manual only |  | D |  |  |  |
| R.1.36 | Operators should be able to create drop in / queues and assign the default operators and / or group of operators that will be running the queue |  | D |  |  |  |
| R.1.37 | Operators should be able to set the queue size limit |  | D |  |  |  |
| R.1.38 | Operators should be able to manage the opening and closing of queues using default times with the option to manually override opening and closing |  | D |  |  |  |
| R.1.39 | Operators should be able to manage drop in / queues through adding and removing of advisers on duty to calculate the estimated waiting time, and allow students to self-join and cancel, which staff can override |  | D |  |  |  |
| R.1.40 | Operators should be able to run drop in queues with the ability to mark themselves active on the queues they’ve been assigned to, be able to add / remove students to the queue, and be able to mark the reason why the student is here (from a pre-set drop down list) or leave blank (triaging) |  | D |  |  |  |
| R.1.41 | Operators must be able to run appointments so the adviser is notified when the student arrives, with the adviser also being able to run the appointment | E |  |  |  |  |
| R.1.42 | Operators must be able to see the student booking notes and form if used, and see any previous (non-private) notes including any key flags e.g. WP, number of appointments booked, and any red flags placed on student profile i.e. there is a concern with the particular student | E |  |  |  |  |
| R.1.43 | Operators must be able to see their next appointment time and basic details about the appointment | E |  |  |  |  |
| R.1.44 | Operators must be able to ‘finish’ their appointments and be able to add notes and documents if required. They must be able to set these notes to either student viewable or only viewable by staff | E |  |  |  |  |
| R.1.45 | Operators should be able to tag other operators in these notes and the tagged operators to be notified automatically by the CSMS |  | D |  |  |  |
| R.1.46 | Operators must be able to raise flags when finishing an appointment that will be visible to other operators | E |  |  |  |  |
| R.1.47 | Operators must be able to book the student another appointment or refer them to referrals-only appointments | E |  |  |  |  |
| R.1.48 | Operators should be able to tick off certain fields i.e. as part of awards / pathways when finishing an appointment |  | D |  |  |  |
| R.1.49 | The CSMS must log the start and finish time of each appointment | E |  |  |  |  |
| R.1.50 | Operators must have the ability to set the CSMS to send a pre-set feedback forms to the student once the appointment is completed | E |  |  |  |  |
| R.1.51 | The CSMS should have the option to send the form after a custom set period of time that can be set differently per appointment type | E |  |  |  |  |
| R.1.52 | Operator must be able to report on appointments by the following criteria by adviser: group / tags; time parameter; cancellations, missed and completed appointments; locations; duration | E |  |  |  |  |
| R.1.53 | Operator must be able to report on appointments by the following criteria by student: department, school / faculty, course / degree, type of student, year of study, tags, by group / tags, appointment type(s) | E |  |  |  |  |
| R.1.54 | In addition to the previous, the operator should report by number of booking attempts by each student |  | D |  |  |  |
| R.1.55 | Operator must be able to report by appointment type by all the above criteria, and by custom criteria (e.g. by custom date range) | E |  |  |  |  |
| R.1.56 | Operator must be able to work as a student to see the available appointments from the student’s perspective, book the appointment on their behalf, see previously booked appointment, see the appointment notes they can see | E |  |  |  |  |
| R.1.57 | Students / graduates must be able to see the appointment types that they’re eligible for, including the appointment description and the number of appointments of this type that are available | E |  |  |  |  |
| R.1.58 | Students / graduates must be able to see available appointments including bookable and non-bookable appointments (can be enable / disabled by operator), appointment type description, the adviser’s name, location and booked appointments | E |  |  |  |  |
| R.1.59 | Students / graduates must be able to search and filter appointments by adviser, location, type and by specific date / date range | E |  |  |  |  |
| R.1.60 | Students / graduates must be able to see referral appointments if they have been referred with ability to complete any related forms that might have been assigned to them for the referral | E |  |  |  |  |
| R.1.61 | CSMS should recommended tailored appointment for each student & graduate based on their individual circumstances, preferences, interests and / or behaviour on the system (AI driven) including career readiness status |  | D |  |  |  |
| R.1.62 | Students / graduates should be able to use an appointment finder tool that recommends certain appointment type(s) after answering a form (in case they are not sure which type to book) |  | D |  |  |  |
| R.1.63 | Students / graduates must be able to book an appointment on the spot, amend their booking (as long as it meets operator set time limit), add notes / fill in booking form if required | E |  |  |  |  |
| R.1.64 | Students / graduates must be able to book an appointment which generates a calendar appointment / invite within the CSMS's student calendar and as an appointment invite to their email calendar (i.e. as iCal) | E |  |  |  |  |
| R.1.65 | Students / graduates must be able to book an appointment, which notifies the adviser, updates the adviser’s calendar with the student’s details within the CSMS's adviser calendar and as an update to their existing iCal appointment | E |  |  |  |  |
| R.1.66 | Students / graduates must be able to book an appointment and the system checks for an appointment conflict in the student’s calendar and prevents the booking if that is the case | E |  |  |  |  |
| R.1.67 | Students / graduates must be able to attend appointments and self-check in using a tablet / PC (E), | E |  |  |  |  |
| R.1.68 | Students / graduates should be able to scan themselves in using supported scanning / swiping hardware or using their app in a certain location i.e. geofencing /beacon |  | D |  |  |  |
| R.1.69 | Students / graduates should be able to see all the drop-in queues that are currently open and they’re eligible to join, along with an estimated waiting time based on the number of advisers active on duty, length of appointment, number of students being seen and number of students waiting |  | D |  |  |  |
| R.1.70 | Students / graduates should be able to remove themselves from a drop in queue that they’re currently in the queue for |  | D |  |  |  |
| R.1.71 | Students / graduates must be able to cancel certain types of appointments within an operator set time limit, which triggers an update of the adviser’s calendar with the removal of the student’s details (in-CSMS calendar and updates their existing iCal appointment) | E |  |  |  |  |
| R.1.72 | Visiting/external advisers must have a temporary access to the CSMS with the ability to set up, view and manage their own appointments only | E |  |  |  |  |
| R.1.73 | Academic staff/personal tutors should be able to view available and/or completed appointments based on the group of students that they are assigned to/look after and the appointment notes |  | D |  |  |  |
| R.1.74 | Peer support students must be able to access the CSMS but with restrictions on viewing personal details and notes of students | E |  |  |  |  |
| R.1.75 | Peer support students must be able to view/raise flags to student profiles | E |  |  |  |  |
| R.1.76 | Peer support students must be able to check in students for appointments when they arrive and book appointments on their behalf | E |  |  |  |  |
| R.1.77 | Peer support students should be able to manage/add/remove students to the drop in queues |  | D |  |  |  |
| R.2 | **Events** | | | | | |
| R.2.0 | Please see the following embedded PDF file for the events process. Please give a top level overview in the Comments section (the detail will be dealt within the subsequent questions) of how you solution will enable this process and highlight any unique features or benefits that your solution would bring to this process. | E |  |  |  |  |
| R.2.1 | The system must allow operators to create, read, update and delete customisable events | E |  |  |  |  |
| R.2.2 | Events must be customised by type/category, location, description, associated employer(s), duration, booking procedures, booking criteria, and any additional custom fields that are controlled by an operator | E |  |  |  |  |
| R.2.3 | The system must allow operators to pre-set event types & templates for different event types including which fields should appear on each type | E |  |  |  |  |
| R.2.4 | The system must allow operators to view, update and delete those different pre-set event types and templates | E |  |  |  |  |
| R.2.5 | Operators must be able to control which students can view each events. The restrictions can be set to none, particular group of students/graduates by: course/degree, school/faculty, department, type (postgraduate taught, postgraduate research, undergraduate, foundation, post doctorate, perspective, graduate), year of study, year of graduation, student tags/labels, career readiness statement, other attributes (widening participation background, disability, gender & on a sandwich/gap year) and any other custom fields as set by the operator, or a combination of the above attributes (with an and/or option) | E |  |  |  |  |
| R.2.6 | Operators must be able to control which employers can see the employer viewable events. This needs to be done in order, by the following attributes: employer association (if the event is assigned to that organisation(s)), industry, employer tags, or by invitation only (operator to manually invite that organisation to view and/or book the event) | E |  |  |  |  |
| R.2.7 | Operators must be able to control which employers can view & book events | E |  |  |  |  |
| R.2.8 | Operators must be able to schedule a one-off event and repeat events (on a weekly, biweekly, monthly or quarterly basis) with the ability to control the maximum number of times any student can book on a repeat event | E |  |  |  |  |
| R.2.9 | Operators must have the ability to breakdown an event into slots and bulk schedule them (in concurrent slots, back to back or spread out), with the ability to limit the number of slots any student book (default must be one) | E |  |  |  |  |
| R.2.10 | Ability for employers to view and manage the above event slots |  | D |  |  |  |
| R.2.11 | Ability to release events to employers without a set date, so that employers can express an interest in attending or hosting those events. Employers need the ability to be able to specify a date or a date range that works for them. |  | D |  |  |  |
| R.2.12 | Ability to release certain events types on a pre-set date/s that employers can pick and choose from |  | D |  |  |  |
| R.2.13 | The CSMS must have a calendar for each event location and automatically check for conflicts when scheduling events and appointments | E |  |  |  |  |
| R.2.14 | Ability to release the event to different groups at different dates & times, i.e. students, graduates and employers | E |  |  |  |  |
| R.2.15 | Ability to release to different groups of students at different dates & times, i.e. first years, final year … etc |  | D |  |  |  |
| R.2.16 | Ability to set a different booking opening date & time that is separate from the event's publishing/release date | E |  |  |  |  |
| R.2.17 | Ability for operators to set the maximum number of bookings/available spaces, with an option to have this set as unlimited | E |  |  |  |  |
| R.2.18 | Ability to add a waiting list to a bookable event and operators to set either the waiting lists as unlimited or limited space (operators must be able to set a number for the latter). CSMS to transfer students on the waiting list onto bookings automatically when cancellations occur | E |  |  |  |  |
| R.2.19 | Ability for operators to create tasks when setting up events and assigning them to operators, which will then appear on their dashboard until marked as complete |  | D |  |  |  |
| R.2.20 | Ability to set a deadlines & reminders for the assigned tasks |  | D |  |  |  |
| R.2.21 | The CSMS must handle payments from employers for events attendance and hosting, including taking credit & debit card payments | E |  |  |  |  |
| R.2.22 | The system must be able to generate invoices and accept Purchase Orders | E |  |  |  |  |
| R.2.23 | The system should be able to mark invoices and/or charges as paid |  | D |  |  |  |
| R.2.24 | The system should be able to send automatic payment reminders (by email/in-system notification/text) to employers and/or contacts |  | D |  |  |  |
| R.2.25 | Operators must be able to set different bands of charges for different types of employers (such as charities),and set the price for each and relevant discount rates | E |  |  |  |  |
| R.2.26 | Operators must be able to override payments and where appropriate, waive the charge for certain employers | E |  |  |  |  |
| R.2.27 | The CSMS must be able to integrate/sync with the college's own payment system (instead of the CSMS built in one) for the colleges that needs to use their own payment system | E |  |  |  |  |
| R.2.28 | The system should allow events to be co-hosted between 2 or more colleges, with the ability to set a primary host college |  | D |  |  |  |
| R.2.29 | The system should allow additional colleges to have access to the event's settings, once they've become a co-host, and have the ability to see attendees (and their college) and waiting lists |  | D |  |  |  |
| R.2.30 | The system must allow the ability to assign an operator(s) or a group of operators as the event owner(s) so as to receive event related notifications and have the ability to edit the event details | E |  |  |  |  |
| R.2.31 | Operators must be able to duplicate an existing event as a new event and edit any of the details and settings | E |  |  |  |  |
| R.2.32 | The system must allow the operator to set up and select which fields go on the event details as well as their data type | E |  |  |  |  |
| R.2.33 | The system must allow the operator to use rich text to input and edit event details | E |  |  |  |  |
| R.2.34 | The operator must be able to attach documents (such as PDF, DOC and DOCX) and images (PNG, JPEG, GIF) to the event details | E |  |  |  |  |
| R.2.35 | The operator must be able to link the event to an employer(s) and have the ability to use the employer's logo from the linked employer profile | E |  |  |  |  |
| R.2.36 | Linked employers should have the ability to receive event related notifications for the event(s) that they're hosting/attending |  | D |  |  |  |
| R.2.37 | The system must allow the ability to link existing in-system vacancies and/or events to a particular event | E |  |  |  |  |
| R.2.38 | Operators must be able to enable or disable booking for each event. Bookings can be for students, employers or both, which must be selected by the operator | E |  |  |  |  |
| R.2.39 | Operators must be able to set the booking conditions and criteria for each different user group. Users who don't meet the booking criteria must not see the booking option | E |  |  |  |  |
| R.2.40 | Operators must be able to set additional custom data fields to fill and documents to upload as part of the booking process. Users won't be able to book until they've completed & submitted that information. Operators must be able to set different fields for different user groups | E |  |  |  |  |
| R.2.41 | Operators (with appropriate permissions) must be able to edit existing events, including the ability to release/hide that event and any of the details | E |  |  |  |  |
| R.2.42 | Date/time and location modifications must automatically trigger a notification/email to the booked users and update any calendar invites with the new details | E |  |  |  |  |
| R.2.43 | Operators must be able to edit only their own events or events that they have been assigned to. Other operators will require an extra level of permissions to edit events that they're not associated with | E |  |  |  |  |
| R.2.44 | Operators must be able to switch booking on/off, waiting lists on/off, increase/decrease booking capacity and add/remove users to those lists | E |  |  |  |  |
| R.2.45 | Operators (with appropriate permissions) must be able to delete events. This could be a one off deletion, bulk delete (for a series of events), and/or delete certain slots rather than the full event. Booked users must be notified automatically by email and/or other forms of notification (push notification, text notification or in-CSMS notification) about events deletion that they have been booked on | E |  |  |  |  |
| R.2.46 | Operators must be able to view all events (providing that they're eligible to view them) via a calendar view and a list view | E |  |  |  |  |
| R.2.47 | Operators must be able to filter events on those 2 views by various criteria, e.g. event type, location, date range, booking size … etc | E |  |  |  |  |
| R.2.48 | Operators must be able to quickly view all events that are associated with a particular employer (for both events they're attending and events that they're hosting) | E |  |  |  |  |
| R.2.49 | Operators must be able to view all events and appointments at a particular location | E |  |  |  |  |
| R.2.50 | Operators (with appropriate permissions) must be able to see a list of students who booked to attend an event including any additional details and documents that they've supplied | E |  |  |  |  |
| R.2.51 | Operators should be able to create/generate a single PDF document with the all the booked students' details and the documents that they've supplied |  | D |  |  |  |
| R.2.52 | Operators must be able to print an attendance sheet with the booked names and any other selectable additional fields including an empty column for students to sign | E |  |  |  |  |
| R.2.53 | Operators must be able to filter the list of attendees based on any of the supplied details | E |  |  |  |  |
| R.2.54 | Operators must be able to bulk email all and filtered booked students via the CSMS with custom emails | E |  |  |  |  |
| R.2.55 | Operators should be able to attach documents to the above custom emails |  | D |  |  |  |
| R.2.56 | CSMS must generate and send booking confirmation and reminders near the time of the event to the booked students | E |  |  |  |  |
| R.2.57 | Operators must be able to send notification to all and filtered attending students via email, in-CSMS notification, push notification via CSMS app and by text/SMS | E |  |  |  |  |
| R.2.58 | CSMS should support the ability to send geo-fenced notifications to booking/attending students |  | D |  |  |  |
| R.2.59 | Operators should be able to create/generate a single PDF document with the all the waiting list students' details and the documents that they've supplied |  | D |  |  |  |
| R.2.60 | Operators must be able to print an attendance sheet with the waiting list names and any other selectable additional fields inc. an empty column for students to sign | E |  |  |  |  |
| R.2.61 | Operators must be able to filter the list of students on the waiting list based on any of the supplied details | E |  |  |  |  |
| R.2.62 | Operators must be able to bulk email all and filtered waiting list students via the CSMS with custom emails | E |  |  |  |  |
| R.2.63 | Operators must be able to send notification to all and filtered waiting list students via email, in-CSMS notification, push notification via CSMS app and by text/SMS | E |  |  |  |  |
| R.2.64 | CSMS must move students on the waiting list to the booked list when a space becomes available or when an operator increases the booking capacity | E |  |  |  |  |
| R.2.65 | Student to be notified automatically by the system | E |  |  |  |  |
| R.2.66 | CSMS should default to first in first out, while giving additional control to the operator, i.e. taking other criteria in place or allowing an operator to manually confirm/change the booking rather than it happening automatically |  | D |  |  |  |
| R.2.67 | Operators (with appropriate permissions) must be able to override the booking restrictions and criteria at any time including the ability to add additional students manually to the booking list beyond the set capacity (the system needs to warn about this) | E |  |  |  |  |
| R.2.68 | Operators must be able to mark students as attended either by marking them manually one at the time or via a bulk attendance (i.e. uploading a list of names/student IDs … etc) | E |  |  |  |  |
| R.2.69 | Operators must be able to send feedback forms once the event is completed. This could be done automatically by setting the event to send it straight after the event's end time or after a set time (by hours) after the event's end time. Alternatively, this can be set to manual and will only be sent when the operator triggers it | E |  |  |  |  |
| R.2.70 | CSMS must support self check in for attendees to mark themselves as arrived/attended | E |  |  |  |  |
| R.2.71 | This can be done via a service-provided tablet/device that's locked to the self check in screen and students can scan their ID or use the touch screen to input their details | E |  |  |  |  |
| R.2.72 | The system must support 3rd party scanners, either directly connected to a device running the CSMS check in screen or an offline scanner that scans IDs and these can be uploaded in bulk to the CSMS to mark as attended | E |  |  |  |  |
| R.2.73 | Ability for students to use their own devices to check in/mark themselves as attended as long as they're within certain proximity from a certain location, i.e. geofencing |  | D |  |  |  |
| R.2.74 | All (non-offline) devices and checking terminals must sync and show real time attendance data | E |  |  |  |  |
| R.2.75 | Operators (with appropriate permissions) must be able to see a list of employers who booked to attend an event including any additional details and documents that they've supplied | E |  |  |  |  |
| R.2.76 | Operators should be able to create/generate a single PDF document with the all the booked employers details and the documents that they've supplied |  | D |  |  |  |
| R.2.77 | Operators must be able to print an attendance sheet with the booked employers names and any other selectable additional fields | E |  |  |  |  |
| R.2.78 | Operators must be able to filter the list of attendees based on any of the supplied details | E |  |  |  |  |
| R.2.79 | Operators must be able to bulk email all and filtered booked employers via the CSMS with custom emails | E |  |  |  |  |
| R.2.80 | Operators should be able to attach documents to the above custom emails |  | D |  |  |  |
| R.2.81 | CSMS must generate and send booking confirmation and reminders near the time of the event to the booked employers | E |  |  |  |  |
| R.2.82 | Operators must be able to send notification to all and filtered attending students via email, in-CSMS notification, push notification via CSMS app and by text/SMS | E |  |  |  |  |
| R.2.83 | Operators should be able to create/generate a single PDF document with the all the waiting list employers' details and the documents that they've supplied |  | D |  |  |  |
| R.2.84 | Operators must be able to print an attendance sheet with the waiting list names and any other selectable additional fields | E |  |  |  |  |
| R.2.85 | Operators must be able to filter the list of employers on the waiting list based on any of the supplied details | E |  |  |  |  |
| R.2.86 | Operators must be able to bulk email all and filtered waiting list employers via the CSMS with custom emails | E |  |  |  |  |
| R.2.87 | Operators must be able to send notification to all and filtered waiting list employers via email, in-CSMS notification, push notification via CSMS app and by text/SMS | E |  |  |  |  |
| R.2.88 | CSMS must move employers on the waiting list to the booked list when a space becomes available or when an operator increases the booking capacity | E |  |  |  |  |
| R.2.89 | Employers to be notified automatically by the system | E |  |  |  |  |
| R.2.90 | CSMS should default to first in first out, while giving additional control to the operator, i.e. taking other criteria in place or allowing an operator to manually confirm/change the booking rather than it happening automatically |  | D |  |  |  |
| R.2.91 | Operators must be able to remove employers from the waiting list entirely | E |  |  |  |  |
| R.2.92 | CSMS should allow operators to set up a staff rota for specific events and sub part of events with ability to select staff from the list of active operators on the CSMS |  | D |  |  |  |
| R.2.93 | Ability for operators to mark tasks and/or sub tasks as complete |  | D |  |  |  |
| R.2.94 | CSMS to generate an in-CSMS task in each operator's account for the assigned tasks and calendar invite |  | D |  |  |  |
| R.2.95 | CSMS to send reminders for outstanding tasks and near the deadlines |  | D |  |  |  |
| R.2.96 | CSMS to produce a printout/export of the staff rota that can be circulated/shared |  | D |  |  |  |
| R.2.97 | Operators (with appropriate permissions) must be able to use the CSMS as a particular student and see the events that they're eligible for from the student's perspective | E |  |  |  |  |
| R.2.98 | Operators must be able to view previously booked events by this student and book new events on their behalf | E |  |  |  |  |
| R.2.99 | Operators (with appropriate permissions) must be able to use the CSMS as a particular employer/contact and see the events that they're eligible for from the employer's perspective | E |  |  |  |  |
| R.2.100 | Operators must be able to view previously booked events by this employer and book new events on their behalf | E |  |  |  |  |
| R.2.101 | Operators should be able to book non-students into events, e.g. staff members |  | D |  |  |  |
| R.2.102 | Operators must be able to report on all events on the system and their attendance | E |  |  |  |  |
| R.2.103 | Operators must be able to report on students engagement with events by: department, school/faculty, course/degree, type of student, year of study, student tag(s), careers readiness, event type(s), registration/attendance status (booked, attended, missed, cancelled or attended without booking) | E |  |  |  |  |
| R.2.104 | Operators must be able to report on all employers engagement with events by: employer type, industry, employer tag(s), event type, employer's location, registration/attendance status (booked, attended, missed or cancelled) | E |  |  |  |  |
| R.2.105 | Ability to report on custom fields and custom criteria | E |  |  |  |  |
| R.2.106 | Students/graduates to view all events that they're eligible to view, inc. list and calendar views, event description & any attachments, location, linked employer and booking status (no booking needed, bookable with spaces available, bookable but fully booked, bookable but booking managed on an external site) | E |  |  |  |  |
| R.2.107 | Students/graduates to see related/similar events to the one that they're currently viewing | E |  |  |  |  |
| R.2.108 | The above needs to be predominant in case the event is fully booked |  | D |  |  |  |
| R.2.109 | Students/graduates must be able to search and filter events by various criteria, such as event type, employer type, event tag(s), location and on a specific date/date range | E |  |  |  |  |
| R.2.110 | Students/graduates must be able to save / "star" events that they're interested in without having to book | E |  |  |  |  |
| R.2.111 | CSMS to recommend events to students based on their circumstances, preferences, interests and/or behaviour on the system (must be AI driven) |  | D |  |  |  |
| R.2.112 | Students/graduates to be able to book on the spot if there are spaces available (as long as they're not blocked from booking events on the system) | E |  |  |  |  |
| R.2.113 | Students/graduates to be able to join a waiting list for a fully booked event and be automatically notified if/when a space becomes available | E |  |  |  |  |
| R.2.114 | Students/graduates to fill any required fields and upload any required documents on the event booking as set by the operator | E |  |  |  |  |
| R.2.115 | Students/graduates to receive a calendar invite to their personal calendar for confirmed/booked events as well as their in-CSMS calendar | E |  |  |  |  |
| R.2.116 | Students/graduates must be able to amend/cancel their booking as long as it's within an operator set time limit for amends/cancellation | E |  |  |  |  |
| R.2.117 | Students/graduates should be able to share the event on social media/by email. CSMS to pre-populate a message with the unique link to the event (without the location) that they can use |  | D |  |  |  |
| R.2.118 | CSMS to check for any conflicts in the student's CSMS calendar before booking an event (in case it clashes with another event or appointment) and warn/prevent booking if that's the case | E |  |  |  |  |
| R.2.119 | Students/graduates must be able to self check in when they attend events (as defined under the operator's section) and/or checked in manually by the operator | E |  |  |  |  |
| R.2.120 | CSMS to remove the calendar entry in their own calendar (and the CSMS's) upon cancelling their booking | E |  |  |  |  |
| R.2.121 | Employers must be able to view the employer viewable/bookable events that they are eligible to view, inc. fairs and available empty event slots that they can book to host | E |  |  |  |  |
| R.2.122 | Employers must be able to view the booking information, procedures and terms & conditions | E |  |  |  |  |
| R.2.123 | Employers should be able to contact operators within the CSMS with enquiries about specific events |  | D |  |  |  |
| R.2.124 | Employers must be able to express an interest in attending/booking certain events rather than booking them directly (needs to be reviewed and authorised by an operator) | E |  |  |  |  |
| R.2.125 | Employers should be able to see the number of students booked to attend their events but with no personal details (this can be switched on/off per event by operators) |  | D |  |  |  |
| R.2.126 | Employers should be able to view the CVs/profiles of the booked the students (if made viewable by both the student and operator) |  | D |  |  |  |
| R.2.127 | CSMS to recommend events to employers based on their profile preferences and/or behaviour on the system (must be AI driven) |  | D |  |  |  |
| R.2.128 | CSMS to display similar events at other TCG colleges that might be of interest to the employer (needs to be switched on/off by each individual college) |  | D |  |  |  |
| R.2.129 | Employers must be able to book to attend an event if they meet the eligibility criteria, which would need checking and approving by the operator before the booking is confirmed and providing that there are spaces left | E |  |  |  |  |
| R.2.130 | Employers must be able to join a waiting list for fully booked events and automatically move & be notified when a space becomes available | E |  |  |  |  |
| R.2.131 | Employers must be able to amend and/or cancel their event booking as long as it meets the operator set time limit | E |  |  |  |  |
| R.2.132 | Employers to complete any required booking form fields and additional questions, i.e. stand size, before their booking application goes through as set by the operator | E |  |  |  |  |
| R.2.133 | Employers must be able to select a contact(s) (or add a new one) to be their main contact for this event | E |  |  |  |  |
| R.2.134 | CSMS to generate a calendar invite and send to the main contact(s) as well as adding it to their in-CSMS calendar | E |  |  |  |  |
| R.2.135 | Assigned operator to the event must be notified when an employer cancel or amend their booking | E |  |  |  |  |
| R.2.136 | Ability for employers to add their own off-campus hosted events (must be reviewed and approved by an operator) |  | D |  |  |  |
| R.2.137 | Academic staff/personal tutors to view all events on the CSMS | E |  |  |  |  |
| R.2.138 | Academic staff/personal tutors to filter events on the CSMS by booked students (or their department) that the staff is attached to |  | D |  |  |  |
| R.2.139 | Academic staff/personal tutors to see list of events on the CSMS that are booked by the individual students that the staff is attached to |  | D |  |  |  |
| R.2.140 | Peer support students to check in students during events | E |  |  |  |  |
| R.2.141 | Peer support students to book events on behalf of students | E |  |  |  |  |
| R.2.142 | Peer support students to be able to add notes/flags to booked students' profiles | E |  |  |  |  |
| R.3 | **Employers** |  |  |  |  |  |
| R.3.0 | Please see the following embedded PDF file for the employers process. Please give a top level overview in the Comments section (the detail will be dealt within the subsequent questions) of how your solution will enable this process and highlight any unique features or benefits that your solution would bring to this process. | E |  |  |  |  |
| R.3.1 | Operators must be to view all employers on the system and whether they are: active, deleted/archived, in draft, pending release, hidden or blocked | E |  |  |  |  |
| R.3.2 | Operators must be able to search & filter all employers by: industry type, job type(s), location, size, employer tag(s), free text search, by contact details, by being active (contact logged in during specific date range, posted vacancies, participated in/hosted events) and by any other custom criteria | E |  |  |  |  |
| R.3.3 | Operators must be able to view employer details including: contact details, associated vacancies (active, pending & expired), associated placements to this employer (active, pending & expired), associated events to this employer that they're hosting (active & expired) and attending (upcoming, pending and expired) | E |  |  |  |  |
| R.3.4 | Operators must be able to view the communication history & emails with this employer | E |  |  |  |  |
| R.3.5 | Operators must be able to view all contacts associated with this employer and their individual details. Operators must be able to add/modify/remove contacts to this employer (if they have appropriate permissions) | E |  |  |  |  |
| R.3.6 | Operators must be able to merge employer profiles (of 2 or more existing profiles on the system) with the ability to select which details to retains from the different profiles. Operators also need the option of defining one of more of these profiles as a subsidiary or a parent company. | E |  |  |  |  |
| R.3.7 | Operators must be able to view/add/edit/remove notes and flags to this employer | E |  |  |  |  |
| R.3.8 | Operators should be able to view and set whether this employer and/or contacts has been authorised to automatically approve vacancies and/or contacts without going through the standard manual review workflow |  | D |  |  |  |
| R.3.9 | Operators must be able to view and assign/de-assign employers to custom operator-set groups, i.e. Times Top 100 | E |  |  |  |  |
| R.3.10 | Operators must be able to view and assign/de-assign employer tag(s) and any additional custom fields as set by the operators | E |  |  |  |  |
| R.3.11 | Operators must be able to view a list of all contacts on the system and their contact details | E |  |  |  |  |
| R.3.12 | Operators must be able to view if individual contacts have used/logged in the CSMS and the dates & times of their recent visits | E |  |  |  |  |
| R.3.13 | Operators must be able to view the activity log for each contact and the vacancies &placements they've posted, events they've booked and history of communication | E |  |  |  |  |
| R.3.14 | Operators must be able to view the contact details changes and whether it was the contact themselves or which of the operator(s) who made them & when | E |  |  |  |  |
| R.3.15 | Operators must be able to set a particular contact to be the main contact for the employer and assign roles for other contacts, i.e. main events contact, main placement contact … etc | E |  |  |  |  |
| R.3.16 | Operators must be able to search and filter all contacts by any of their details and contact tags | E |  |  |  |  |
| R.3.17 | When adding a new employer, the CSMS must check for duplication/existence in the system and inform the user in case one was found | E |  |  |  |  |
| R.3.18 | In case of duplication, the CSMS must allow the operator to merge profiles, adding it as a subsidiary or a parent company (with the ability to select which is which) or adding it as a new employer | E |  |  |  |  |
| R.3.19 | Operators must be able to add new employers and complete the following details: employer's name, main industry (one selection), additional industry(s) (multiple selection), contact details (physical address, telephone number(s), email(s) and URL(s)), employer's address (one primary and additional addresses that can be labelled, i.e. regional offices), employer's description, employer tag(s), company size, logo and any additional custom fields as defined by the operator | E |  |  |  |  |
| R.3.20 | Operators should be able to add the company registration number, flag if this is a recruitment agency, flag if this is a charity/NGO (if triggered, option to add the charity registration number should appear) and social media handles |  | D |  |  |  |
| R.3.21 | The CSMS must allow rich text input and editing for some of the above fields, i.e. description | E |  |  |  |  |
| R.3.22 | Operators (with appropriate permissions) must be able to add/edit/remove any of the fields above and set which are required and which are optional | E |  |  |  |  |
| R.3.23 | Operators must be able to control which students can view each employers. The restrictions can be set to none, particular group of students/graduates by: course/degree, school/faculty, department, type (postgraduate taught, postgraduate research, undergraduate, foundation, post doctorate, perspective, graduate), year of study, year of graduation, student tags/labels, career readiness statement, other attributes (widening participation background, disability, gender & on a sandwich/gap year) and any other custom fields as set by the operator, or a combination of the above attributes (with an and/or option) | E |  |  |  |  |
| R.3.24 | Operators should have the option of setting the employer's profile to be only viewable when there are active vacancies or events attached |  | D |  |  |  |
| R.3.25 | Operators must have the ability to assign an operator or a group of operators to the employer | E |  |  |  |  |
| R.3.26 | Operators must be able to assign/de-assign the employer to an internal band/category/group classification | E |  |  |  |  |
| R.3.27 | Operators should have the option to mass-set settings and bulk email employers on those internal groups |  | D |  |  |  |
| R.3.28 | Operators should have the option to make the employer's profile hidden on the system |  | D |  |  |  |
| R.3.29 | Operators must have the ability to block/unblock employers from using the system | E |  |  |  |  |
| R.3.30 | Operators must have the ability to create new contacts and fill their: name, position, address (with the default being the employer's address), email(s), telephone number(s), whether they can access the CSMS (yes/no), social media handles, opting in/out to receive CSMS bulk mailing, notes (only viewable by operators), history of communication and any other additional fields as defined by the operator | E |  |  |  |  |
| R.3.31 | Operators must be able to assign/de-assign an operator/group of operators to the contact | E |  |  |  |  |
| R.3.32 | Operators must have the ability to block/unblock the contact from using the CSMS | E |  |  |  |  |
| R.3.33 | Operators must be able to modify employer accounts including: their details, contacts' details, changing status, merging & deactivating profiles | E |  |  |  |  |
| R.3.34 | Operators must be able to modify contacts accounts including: their details, trigger their password reset, ability to deactivating their account, move their account to another organisation and block/unblock their access to the system | E |  |  |  |  |
| R.3.35 | Operators must be able to delete and/or archive employer and contact contacts accounts | E |  |  |  |  |
| R.3.36 | Operators must be able to add/edit/remove individuals notes on the employer accounts and contacts | E |  |  |  |  |
| R.3.37 | Operators must be able to attach emails from Outlook/email clients to the employer and/or contact notes section on the CSMS | E |  |  |  |  |
| R.3.38 | Operators should be able to add/modify/remove tasks relating to employers and contacts |  | D |  |  |  |
| R.3.39 | Operators should be able to assign these tasks to operator(s), group of operators or themselves and add a completion date/deadline |  | D |  |  |  |
| R.3.40 | Operators should be able to mark their own tasks as complete |  | D |  |  |  |
| R.3.41 | CSMS should send reminders to the tasks assignee when new tasks are assigned to them and near the deadline if the task not complete |  | D |  |  |  |
| R.3.42 | Operators must be able to upload unlimited number of files & documents to the employer and contact profiles | E |  |  |  |  |
| R.3.43 | CSMS must accept the following formats: PDF, DOC, DOCX, JPEG, PNG, PPT, PPTX, XLS, XLSX and RTF | E |  |  |  |  |
| R.3.44 | CSMS must log the date of upload and which operator uploaded them | E |  |  |  |  |
| R.3.45 | Operators (with appropriate permissions) must be able to delete any of the uploaded files | E |  |  |  |  |
| R.3.46 | Operators must be able to view the list of employers in the pending queue | E |  |  |  |  |
| R.3.47 | Operators must be able to search and filter those pending employers by various criteria (as stated in the search & filter employers requirement) | E |  |  |  |  |
| R.3.48 | Operators must be able to approve pending employer requests and add them to the list of active employers | E |  |  |  |  |
| R.3.49 | Operators must be able to modify a pending new employer request then approve | E |  |  |  |  |
| R.3.50 | Operators should be able to lock/assign a pending request to themselves/other operators, i.e. so other operators will leave this request to the assigned operator |  | D |  |  |  |
| R.3.51 | Operators must be able to reject pending requests, they'll need to specify a reason for rejection (which must be free text and an optional pre-set list of common rejection reasons) | E |  |  |  |  |
| R.3.52 | Operators must have to the option to notify the employer of the rejection and its reasons (or not) | E |  |  |  |  |
| R.3.53 | Operators must be able to add operator-only notes to the pending new employer request without having to approve/reject the request | E |  |  |  |  |
| R.3.54 | Operators should have the ability to tag other operator in those notes. Tagged operators must be notified of the tagging |  | D |  |  |  |
| R.3.55 | Operators should be able to select from different templates/pre-set emails to contact the employers via the CSMS, i.e. to check minimum wage or query some details on their request |  | D |  |  |  |
| R.3.56 | Operators must be able to view the list of contacts in the pending queue | E |  |  |  |  |
| R.3.57 | Operators must be able to search and filter those pending contacts by various criteria (as stated in the search & filter contacts requirement) | E |  |  |  |  |
| R.3.58 | Operators must be able to approve pending contact requests and add them to the list of active contacts of their associated employer (either one at the time or in bulk) | E |  |  |  |  |
| R.3.59 | Operators must be able to modify a pending new contact request then approve | E |  |  |  |  |
| R.3.60 | Operators must be able to reject pending new contacts requests, they'll need to specify a reason for rejection (which must be free text and an optional pre-set list of common rejection reasons) | E |  |  |  |  |
| R.3.61 | Operators must have to the option to notify the contact of the rejection and its reasons (or not) | E |  |  |  |  |
| R.3.62 | Operators must be able to add operator-only notes to the pending new contact request without having to approve/reject the request | E |  |  |  |  |
| R.3.63 | Operators must be able to see questions/queries raised by employers and contacts | E |  |  |  |  |
| R.3.64 | Operator must have the ability to respond to their queries via the CSMS and/or mark open threads as done | E |  |  |  |  |
| R.3.65 | Employers to be notified of the operator's response along with an email/in-system alert | E |  |  |  |  |
| R.3.66 | Operators should be able to define/set the types/categories of questions and which operator(s)/group of operator(s) will these types of questions go to |  | D |  |  |  |
| R.3.67 | Operators should have the ability to add/edit/remove these question categories |  | D |  |  |  |
| R.3.68 | Operators must have the ability to reassign the incoming query to another operator(s) / group of operator(s) | E |  |  |  |  |
| R.3.69 | Operators must have the ability to flag employers and/or contacts activity as inappropriate or of concern | E |  |  |  |  |
| R.3.70 | Operators must be able to report on all employers and contacts on the system and their activity/engagement with the CSMS and other user groups | E |  |  |  |  |
| R.3.71 | Operators must be able to report on students engagement with employers by: department, school/faculty, course/degree, type of student, year of study, student tag(s), employer profile views, associated jobs views, "starring"/"favouriting" employers and other criteria as set by the operator | E |  |  |  |  |
| R.3.72 | Operators must be able to report on all employers and contacts engagement with CSMS by: employer type, contact type, industry, employer & contact tag(s), location, company size, activity (logged into the system, posted vacancies & placements, hosted or attended events, contacted the operators via the in-system CSMS) | E |  |  |  |  |
| R.3.73 | Ability to report on the source of employer and contact profiles, whether they were added by operators or posted by the employer/contact, and who added them and when | E |  |  |  |  |
| R.3.74 | Ability to report on custom fields and custom criteria | E |  |  |  |  |
| R.3.75 | Students/graduates must be able to view all organisations on the system (that meet their restriction criteria) | E |  |  |  |  |
| R.3.76 | They must be able to view them via a dedicated employers section on the CSMS and via going to the vacancies section and click through the associated employer(s) | E |  |  |  |  |
| R.3.77 | Students/graduates must be able to search and filter employers by various criteria including: location(s), industry type(s), job type(s), company size, whether they have active vacancies or not, by free text search, by custom criteria | E |  |  |  |  |
| R.3.78 | Students/graduates must be able to use "and" / "or" for the above search criteria | E |  |  |  |  |
| R.3.79 | Students/graduates must be able to save the above search/filter criteria and use them again in the future | E |  |  |  |  |
| R.3.80 | Students/graduates must be able to set up individual email alerts from the CSMS based on their saved search/filter criteria | E |  |  |  |  |
| R.3.81 | Students/graduates must be able to view the organisation's details/profile, including: employer's name, description, main industry, additional industries, company size, website, social media handles and job types that they're recruiting | E |  |  |  |  |
| R.3.82 | Students/graduates must be able to "star"/favourite employers | E |  |  |  |  |
| R.3.83 | Students/graduates must not see any of the contacts or their details | E |  |  |  |  |
| R.3.84 | Students/graduates must be able to view/retrieve a unique link to each employer's profile that they can bookmark and/or share with their fellow students | E |  |  |  |  |
| R.3.85 | Students/graduates must be able to view all the active/live vacancies, placements and events associated with the employer (that meet their restriction criteria) | E |  |  |  |  |
| R.3.86 | Students/graduates should be able to view expired vacancies, placements and events associated with the employer (that meet their restriction criteria) - ideally this needs to be a system-wide setting that super admin can switch on/off |  | D |  |  |  |
| R.3.87 | Students/graduates should be able to see their peers / "in-CSMS friends" who are working/have worked for this employer |  | D |  |  |  |
| R.3.88 | Students/graduates should be able to review & rate employers on the CSMS when doing a placement/internship/job with them - needs to be moderated by the operators |  | D |  |  |  |
| R.3.89 | Students/graduates should be able to ask questions to the employers (moderated by the operators) and employers should be able to respond on those and have them public |  | D |  |  |  |
| R.3.90 | Students/graduates should be able to view employer reviews by other students and graduates |  | D |  |  |  |
| R.3.91 | Academic/other staff must be able to view all employers on the system | E |  |  |  |  |
| R.3.92 | Academic/other staff must be able to search and filter employers by various criteria including: location(s), industry type(s), job type(s), company size, whether they have active vacancies or not, by free text search, by custom criteria | E |  |  |  |  |
| R.3.93 | Academic/other staff must be able to use "and" / "or" for the above search criteria | E |  |  |  |  |
| R.3.94 | Academic/other staff must be able to save the above search/filter criteria and use them again in the future | E |  |  |  |  |
| R.3.95 | Academic/other staff must be able to view the organisation's details/profile, including: employer's name, description, main industry, additional industries, company size, website, social media handles and job types that they're recruiting | E |  |  |  |  |
| R.3.96 | Academic/other staff must be able to view/retrieve a unique link to each employer's profile that they can bookmark and/or share with their fellow students | E |  |  |  |  |
| R.3.97 | Academic/other staff must be able to view all the active/live and expired vacancies, placements and events associated with employers | E |  |  |  |  |
| R.3.98 | Academic/other staff must not see any of the contacts or their details | E |  |  |  |  |
| R.3.99 | Academic/other staff should be able to view employer reviews by students and graduates |  | D |  |  |  |
| R.3.100 | Employers must be able to create their own contact account using their email and set up a CSMS password | E |  |  |  |  |
| R.3.101 | CSMS must check for the email address being in use already or have been set up an operator previously, and if found, it prompts the user to log in with their password or reset it | E |  |  |  |  |
| R.3.102 | CSMS to auto-approve contact account, if their email address's domain matches the organisation's domain name. Must be switch on for select employers by the operator (default is off) | E |  |  |  |  |
| R.3.103 | Employers must be able to complete their own contact details and accept the CSMS & college's terms and conditions before they can use the CSMS | E |  |  |  |  |
| R.3.104 | Employers must be able to create their organisation profile and complete the following details: employer's name, main industry (one selection), additional industry(s) (multiple selection), contact details (physical address, telephone number(s), email(s) and URL(s)), employer's address (one primary and additional addresses that can be labelled, i.e. regional offices), employer's description, employer tag(s), company size, logo and any additional custom fields as defined by the operator | E |  |  |  |  |
| R.3.105 | User should be able to add the company registration number, flag if this is a recruitment agency, flag if this is a charity/NGO (if triggered, option to add the charity registration number should appear) and social media handles |  | D |  |  |  |
| R.3.106 | The CSMS must allow rich text input and editing for some of the above fields, i.e. description | E |  |  |  |  |
| R.3.107 | Employer users must be able to modify their contact account details inc. changing their password | E |  |  |  |  |
| R.3.108 | Employer users must be able to modify their organisation's profile | E |  |  |  |  |
| R.3.109 | Employer users must be able to see other contacts associated with their organisation and add new contact(s) | E |  |  |  |  |
| R.3.110 | Employer users must be able to request changes to other contact(s) details and/or remove contact(s) that are associated with their organisation. These need to be approved by an operator | E |  |  |  |  |
| R.3.111 | Employer users must be able to view their organisation details and track their own engagement with the CSMS | E |  |  |  |  |
| R.3.112 | Employer users must be able to see all the active vacancies, placements and events associated with their organisation and their basic view hits/stats | E |  |  |  |  |
| R.3.113 | Employer users must be able to message the operators easily and securely via the CSMS | E |  |  |  |  |
| R.3.114 | These messages/enquiries must go to the operator(s)/operator group(s) that is associated with the raised question type/category | E |  |  |  |  |
| R.3.115 | Employers must be notified when operators respond and see their response with the ability to send further messages relating to the initial query | E |  |  |  |  |
| R.3.116 | Employers must be able to see a history of their questions and operator responses | E |  |  |  |  |
| R.3.117 | Employers must be able to close/withdraw their message/enquiry | E |  |  |  |  |
| R.4 | **Vacancies** | | | | | |
| R.4.0 | Please see the following embedded PDF file for the vacancies process. Please give a top level overview in the Comments section (the detail will be dealt within the subsequent questions) of how your solution will enable this process and highlight any unique features or benefits that your solution would bring to this process. | E |  |  |  |  |
| R.4.1 | Operators must be to view all vacancies on the system and whether they are: active, expired, rejected (and reasons for rejection), draft, withdrawn, deleted/archived or pending | E |  |  |  |  |
| R.4.2 | For the pending vacancies, operators must be able to approve, edit & approve or reject (with specifying the rejection reasons and option to notify the employer) | E |  |  |  |  |
| R.4.3 | Operators must have the ability to search and filter jobs by: industry type, job type(s), location (UK-based locations: cities, counties and UK-wide option, and worldwide locations: countries & major cities), job tag(s), closing/expiry date, employer, salary, free text search and any other custom fields as set up by the operator | E |  |  |  |  |
| R.4.4 | Operators should have the ability to save search criteria and share that saved search with other users: in-system and via unique link. This should be accessible to students |  | D |  |  |  |
| R.4.5 | Operators must be able to easily view basic job stats on each vacancy, such as number of views, number of "apply now" clicks and number of job saves/favouriting | E |  |  |  |  |
| R.4.6 | Operators must be able to view the details of each job such as: job title, employer (with a link to their employer profile), description, person requirements, expiry date, application details, location (UK-based locations: cities, counties and UK-wide option, and worldwide locations: countries & major cities), job tag(s), salary, job type(s), industry, number of vacancies and any additional custom fields as specified by the operator | E |  |  |  |  |
| R.4.7 | Operators should be able to see more jobs from the same employer on the job's page |  | D |  |  |  |
| R.4.8 | If it's a 3rd party recruiter, operators must be able to see the employer that they're recruiting for |  | D |  |  |  |
| R.4.9 | Operators must be able to view/access a unique link to each job that can be shared outside of the CSMS | E |  |  |  |  |
| R.4.10 | Operators must be able to associated new jobs with an employer profile. This can be done by creating a new employer account (as per employer account creation requirements) or a quick search for an existing employer account & linking the job to it | E |  |  |  |  |
| R.4.11 | Operators should be able to create a basic employer profile to attach the job to. This is a one-off employer profile and is not linked to a proper employer account and doesn't show on the list of organisations |  | D |  |  |  |
| R.4.12 | Operators should be able to post as a third party organisation, i.e. recruiter X recruiting on behalf of employer Y |  | D |  |  |  |
| R.4.13 | Operators must be able to complete the following: job title, description, person requirements (by degree selection and free text), expiry date inc. deadline (option of integrating with expiry date as one field or 2 separate fields), salary (pre-set bands/options, free text, ability to select different currencies, i.e. £, $, € ... etc), job type(s), job tag(s), industry, number of vacancies, job start date and any additional custom created fields by the operators | E |  |  |  |  |
| R.4.14 | Operators must be able to define the application process for each job, which must be one of the following: applying via the CSMS (CSMS-managed recruitment), link to the employer's/3rd party's recruitment website, link to an email address and/or a free text option for the application details | E |  |  |  |  |
| R.4.15 | Operators must be able to define the location by one of the following: UK-based locations: cities, counties and UK-wide option, and worldwide locations: countries & major cities, with ability to add multiple location for multi-location jobs | E |  |  |  |  |
| R.4.16 | The CSMS must check and stop duplication/misspelling of location names | E |  |  |  |  |
| R.4.17 | Option to map (and display) a location by nearest city/county based on entering the postcode/location's name |  | D |  |  |  |
| R.4.18 | The CSMS must allow rich text input and editing for some of the above fields, i.e. description, person requirements, application details … etc | E |  |  |  |  |
| R.4.19 | The CSMS should allow the ability to show the salary's equivalent in Pounds for non-Pounds salaries based on the current exchange rates |  | D |  |  |  |
| R.4.20 | Operators must be able to add operator-only notes to jobs that cannot be viewed by the employer or their contacts | E |  |  |  |  |
| R.4.21 | These notes should include the ability to raise and assign tasks to operators, and operator reminders |  | D |  |  |  |
| R.4.22 | Ability to tag other operators in those notes, and they get notified of the mention |  | D |  |  |  |
| R.4.23 | Operators must be able to set a job as "featured", that will be displayed predominantly/on top of the jobs list | E |  |  |  |  |
| R.4.24 | Operators must be able to set "featured" start and expiry dates & time, with the ability to override at any time. The default start & expiry date should made the job advert's start & expiry dates | E |  |  |  |  |
| R.4.25 | Operators must be able to charge the employers for this feature | E |  |  |  |  |
| R.4.26 | Operators must specify the charge amount from a pre-set price options list with the ability to override with a custom amount | E |  |  |  |  |
| R.4.27 | Operators must specify if the charge is VAT applicable or not, if applicable, they need to provide the VAT registration number | E |  |  |  |  |
| R.4.28 | The CSMS must be able to handle payments, if paid by card | E |  |  |  |  |
| R.4.29 | The CSMS must have the ability to integrate with the pre-existing payment handling system that are used at certain colleges | E |  |  |  |  |
| R.4.30 | The system must be able to generate invoices | E |  |  |  |  |
| R.4.31 | The operators must be able to mark payments as received (if received outside the system) and to bypass payment entirely | E |  |  |  |  |
| R.4.32 | Operators must be able to control which students can view each job. The restrictions can be set to none, particular group of students/graduates by: course/degree, school/faculty, department, type (postgraduate taught, postgraduate research, undergraduate, post doctorate, perspective, graduate), year of study, year of graduation, student tags/labels, career readiness statement, other attributes (widening participation background, disability, gender & on a sandwich/gap year) and any other custom fields as set by the operator, or a combination of the above attributes (with an and/or option) | E |  |  |  |  |
| R.4.33 | Operators should have the ability to set the job to be viewable by all, specific or none of the contacts that are associated with that employer |  | D |  |  |  |
| R.4.34 | Operators must be able to duplicate existing jobs as new and amend their details | E |  |  |  |  |
| R.4.35 | Operators must be able to modify the closing at any time, including extending the closing date/advert or closing it earlier | E |  |  |  |  |
| R.4.36 | Operators must be able to change the associated employer with the job and students/graduates restrictions | E |  |  |  |  |
| R.4.37 | Operators must be able to change the job status between: active/live, delete/archive, draft, pending, withdrawn and reject | E |  |  |  |  |
| R.4.38 | Operators must be able to change any of the job details including; title, description, person requirements, application details & method, salary, location(s), job type(s), industry, number of vacancies, job start date and any other additional custom fields created by the operator | E |  |  |  |  |
| R.4.39 | Operators should be able to change which employer contact(s) can view this job |  | D |  |  |  |
| R.4.40 | Operators must be able to delete/archive jobs | E |  |  |  |  |
| R.4.41 | Operators must be able to view/create/edit/remove operator-only notes on the job | E |  |  |  |  |
| R.4.42 | Operators should be able to tag other operators and they get notified by the CSMS |  | D |  |  |  |
| R.4.43 | Operators should be able to view/add/modify/remove tasks per job |  | D |  |  |  |
| R.4.44 | Operators should be assign tasks to themselves and/or other operator(s)/group of operator(s) and set completion deadline |  | D |  |  |  |
| R.4.45 | CSMS should notify the operators of tasks being assigned to them and remind them near the deadline |  | D |  |  |  |
| R.4.46 | Operators must be able to mark tasks as complete |  | D |  |  |  |
| R.4.47 | Operators must be able to view list of jobs submitted by employers for review in the pending jobs queue | E |  |  |  |  |
| R.4.48 | Operators must be able to search and filter jobs by various criteria | E |  |  |  |  |
| R.4.49 | Operators should be able to lock/assign a pending requests to themselves, i.e. so other operators won't deal with this job while the initial operator is investigating it further |  | D |  |  |  |
| R.4.50 | Operators must be able to approve a pending job posting request, either as an one-off or in bulk | E |  |  |  |  |
| R.4.51 | Operators must be able to modify then approve a pending job posting request | E |  |  |  |  |
| R.4.52 | Operators must be able to reject a pending job posting request | E |  |  |  |  |
| R.4.53 | Operators must specify a reason for the rejection, which could be from a pre-set list of common rejection reasons or a free text option | E |  |  |  |  |
| R.4.54 | Operators must have the option to notify (or not) the employer/contact who posted this job about the rejection and the reason behind it | E |  |  |  |  |
| R.4.55 | Changes made by employers/contacts to live jobs must be reviewed and approved by the operator in a similar manner to the pending job posting requests | E |  |  |  |  |
| R.4.56 | Operators must be able to see the changes quickly compared to the previous/approved post | E |  |  |  |  |
| R.4.57 | Operators must be able to approve, edit then approve or reject the changes (reverting to the current live version of the advert) | E |  |  |  |  |
| R.4.58 | Operators should be able to pre-approve/pre-authorise certain employers/contacts to bypass this and post their changes straight to the live site |  | D |  |  |  |
| R.4.59 | Operators should be able to send/select from different templates/pre-set emails to employers/contacts via the CSMS in relation to the pending job request, i.e. to check the minimum wage or to query some details on their application |  | D |  |  |  |
| R.4.60 | Operators must be able to view "featured" jobs requests by employers | E |  |  |  |  |
| R.4.61 | Operators must be able to approve, edit then approve or reject the requests (in case of approve and edit then approve, then will need to go to the payment handling) | E |  |  |  |  |
| R.4.62 | Operators must be able to specify the reasons for rejection with the option of notifying the employer/contact of the rejection & its reasons | E |  |  |  |  |
| R.4.63 | Operators must be able to handle in-CSMS job applications from students | E |  |  |  |  |
| R.4.64 | Operators must be able to view all applications on the system without having to download them, and their status | E |  |  |  |  |
| R.4.65 | Operators must be able to filter and search those applications by (but not limiting to): associated job, associated employer, job type, application status, closing date and by student details | E |  |  |  |  |
| R.4.66 | Operators must be able to mark applications and add notes (that are viewable by the operators only, by the student or by the employer) | E |  |  |  |  |
| R.4.67 | Operators should have the ability to add score to the applications (with an option to make it viewable by the employers) |  | D |  |  |  |
| R.4.68 | Operators should have the option to rank candidates (with option to make it visible to employers) |  | D |  |  |  |
| R.4.69 | Operators must be able to define the recruitment stages and shortlist candidates | E |  |  |  |  |
| R.4.70 | CSMS must notify the student of the shortlisting by one or more of the following methods: system-generated email, in-system notification, by text/SMS and/or by push notification to the app | E |  |  |  |  |
| R.4.71 | Operators must be able to add student viewable notes/comments to the shortlisting and can be included in the above notification to the student | E |  |  |  |  |
| R.4.72 | Operators must be able to reject candidates with the ability to add feedback/comments to the rejection reasons and notify the student via one or more of the above notification methods | E |  |  |  |  |
| R.4.73 | Operators should have the ability to invite the student to an interview via the CSMS |  | D |  |  |  |
| R.4.74 | Operators should have the ability to define interview slots that students can see and book |  | D |  |  |  |
| R.4.75 | Operators should be able to book an existing CSMS room location for the interview (CSMS should check for clashes with appointments and events) |  | D |  |  |  |
| R.4.76 | Operators should be able to see which students booked which slots |  | D |  |  |  |
| R.4.77 | Operators should be able to print an interview schedule on the day |  | D |  |  |  |
| R.4.78 | Operators should be able to book the student into a slot themselves |  | D |  |  |  |
| R.4.79 | Operators should be able to edit an interview booking and change slots |  | D |  |  |  |
| R.4.80 | Operators should be able to mark students as arrived/attended/missed for their interview slot |  | D |  |  |  |
| R.4.81 | Operators should be able to cancel a booked interview slot |  | D |  |  |  |
| R.4.82 | Operators must be able to make an offer to a student with the ability to add comments/custom text to the offer | E |  |  |  |  |
| R.4.83 | Operators must be notified when the students accepts/rejects the offer | E |  |  |  |  |
| R.4.84 | Operators must be able to see the outcome from the student and any additional comments/feedback that they have added | E |  |  |  |  |
| R.4.85 | Operators should have the ability to time limit the offer |  | D |  |  |  |
| R.4.86 | Operators must be able to complete any additional information and paperwork after the student has accepted the offer, i.e. health & safety … etc, as defined by the operators | E |  |  |  |  |
| R.4.87 | Operators must be able to share the application/profile with the employer and other operators (with optionally academic staff/personal tutors) |  | D |  |  |  |
| R.4.88 | Operators must be able to report on all vacancies on the system including (but not limiting to): number of hits (total & unique), application link clicks (total & unique), job statuses, source of the vacancy (added by the operator, employer via JobOnline team or via the CSMS network), location(s), job type(s), posting date and closing date | E |  |  |  |  |
| R.4.89 | Operators must be able to report on students engagement with vacancies by: department, school/faculty, course/degree, type of student, year of study, student tag(s), "starring"/"favouriting" jobs and other criteria as set by the operator | E |  |  |  |  |
| R.4.90 | Operators must be able to report on all employers and contacts engagement with CSMS to add vacancies by: employer type, contact type, industry, employer & contact tag(s), location, company size, activity or contacted the operators via the in-system CSMS | E |  |  |  |  |
| R.4.91 | Ability to report on the rejected jobs and the reasons for rejection | E |  |  |  |  |
| R.4.92 | Ability to report on custom fields and custom criteria | E |  |  |  |  |
| R.4.93 | Students/graduates must be able to view all the vacancies on the system (that meet their restriction criteria), via a dedicated vacancies section or via going to the employer's profile and seeing their associated (active) vacancies | E |  |  |  |  |
| R.4.94 | Students/graduates must be able to search and filter vacancies by various criteria including: degree requirements, location(s), industry type(s), job type(s), posting date, closing date, by free text search and by custom criteria | E |  |  |  |  |
| R.4.95 | Students/graduates must be able to use "and" / "or" for the above search criteria | E |  |  |  |  |
| R.4.96 | Students/graduates must be able to save the above search/filter criteria and use them again in the future | E |  |  |  |  |
| R.4.97 | Students/graduates should be able to set up individual email alerts from the CSMS based on their saved search/filter criteria |  | D |  |  |  |
| R.4.98 | Students/graduates must have the ability to "star"/"favourite" jobs | E |  |  |  |  |
| R.4.99 | Students/graduates should be able to receive relevant notification to their starred jobs and closing date reminders |  | D |  |  |  |
| R.4.100 | Students/graduates must be able to view/retrieve a unique link to each job that they can bookmark and/or share with their peers | E |  |  |  |  |
| R.4.101 | Students/graduates must be able to apply for CSMS-managed jobs within the system | E |  |  |  |  |
| R.4.102 | Students/graduates must be able to complete the application form as set by the operator (including any custom fields) | E |  |  |  |  |
| R.4.103 | Students/graduates must be able to attach/submit files as set by the operator, i.e. CV. Accepted file formats must be (but not limited to): DOC, DOCX, PDF and RTF | E |  |  |  |  |
| R.4.104 | Students/graduates must be able to accept the terms and conditions (and any other conditions that they must read and accept) as set by the operator | E |  |  |  |  |
| R.4.105 | Students/graduates must be able to start an application then save as draft to complete later | E |  |  |  |  |
| R.4.106 | Students/graduates must be able to view their draft and submitted applications at any time | E |  |  |  |  |
| R.4.107 | Students/graduates must be able to resume completing a previously saved draft application form and submit it (if still within the deadline) | E |  |  |  |  |
| R.4.108 | The CSMS must create a link between the student profile and job once the application has been submitted. i.e. operators will be able to see jobs that this student has applied to & their outcome when visiting their profile as well as seeing the student's name & link to their profile when viewing the applicants section for this job | E |  |  |  |  |
| R.4.109 | Students/graduates must be able to apply for non-CSMS managed jobs by going to the employer's recruitment website or emailing the employer as set by the operator/employer contact | E |  |  |  |  |
| R.4.110 | Students/graduates must be able to manage existing application and track their status with the ability to accept/reject an offer and withdraw their application | E |  |  |  |  |
| R.4.111 | Students/graduates must be notified of the outcome of their application automatically as soon as it's decided along with any additional comments/feedback by the operator | E |  |  |  |  |
| R.4.112 | Students/graduates should be able to see available interview slots if invited to an interview |  | D |  |  |  |
| R.4.113 | Students/graduates should be able to book an interview slot. CSMS must send a calendar invite to the student with the interview details and reminds them near the time |  | D |  |  |  |
| R.4.114 | Students/graduates should be able to change/edit/cancel an existing interview slot booking |  | D |  |  |  |
| R.4.115 | Students/graduates must be able to complete and submit feedback/reflection forms, if requested by the operator after an operator-set interval | E |  |  |  |  |
| R.4.116 | CSMS should have a provision for students to self report outcome for non-CSMS managed vacancies, i.e. if they were offered/accepted a job that was advertised on the CSMS but was managed externally |  | D |  |  |  |
| R.4.117 | Employers should be prompted whether they're a 3rd party recruiting on behalf of a client. If yes, they should be warned about a potential charge |  | D |  |  |  |
| R.4.118 | Employers must be able to add new job adverts to the CSMS themselves | E |  |  |  |  |
| R.4.119 | Employers must be able to associate a contact(s) with the job that could be themselves, a selection from the existing contacts associated with the same employer or a brand new contact | E |  |  |  |  |
| R.4.120 | Employers must be able to input the following details: job title, description, person requirements (by degree selection and free text), expiry date inc. deadline (option of integrating with expiry date as one field or 2 separate fields), salary (pre-set bands/options, free text, ability to select different currencies, i.e. £, $, € ... etc), job type(s), industry, number of vacancies, job start date and any additional custom created fields by the operators | E |  |  |  |  |
| R.4.121 | Employers must be able to define the application process for each job, which must be one of the following: applying via the CSMS (CSMS-managed recruitment - requires operator's authorisation), link to the employer's/3rd party's recruitment website, link to an email address and/or a free text option for the application details | E |  |  |  |  |
| R.4.122 | Employers must be able to define the location by one of the following: UK-based locations: cities, counties and UK-wide option, and worldwide locations: countries & major cities, with ability to add multiple location for multi-location jobs | E |  |  |  |  |
| R.4.123 | The CSMS must check and stop duplication/misspelling of location names | E |  |  |  |  |
| R.4.124 | The CSMS must allow rich text input and editing for some of the above fields, i.e. description, person requirements, application details … etc | E |  |  |  |  |
| R.4.125 | The CSMS should allow the ability to show the salary's equivalent in Pounds for non-Pounds salaries based on the current exchange rates |  | D |  |  |  |
| R.4.126 | Employers must accept the job advertising terms and conditions as set by the operator | E |  |  |  |  |
| R.4.127 | CSMS not to advertise the job if that's not ticked/accepted | E |  |  |  |  |
| R.4.128 | Operators must be able to control the terms and conditions text with ability to link to 3rd party websites for further details | E |  |  |  |  |
| R.4.129 | Employers should be able to select which contact(s) from those associated with the same employer can view the same job |  | D |  |  |  |
| R.4.130 | Employers must be able to duplicate an existing job as new (from an active or an expired job) | E |  |  |  |  |
| R.4.131 | Employers must be able to request to set their job as "featured" | E |  |  |  |  |
| R.4.132 | CSMS must warn that this will require the approval by the operator and there could be a potential charge for this | E |  |  |  |  |
| R.4.133 | Employers must be able to select their desired start and end dates of their job being featured | E |  |  |  |  |
| R.4.134 | Employers must be able to modify jobs that they have previously posted themselves or posted by the operator (and viewable by the employer contact(s)) | E |  |  |  |  |
| R.4.135 | Employers must be able to amend the closing date by either closing the job now or extending it further | E |  |  |  |  |
| R.4.136 | Employers must be able to amend the following details about the job: Location, title, description, requirements, application details, job type(s), number of vacancies, expected interview date(s), job start date and any other custom fields as set by the operator | E |  |  |  |  |
| R.4.137 | Employers must be able to change the associated contact(s) with the advertise job | E |  |  |  |  |
| R.4.138 | Employers be able to view all the jobs associated with their account (that the contacts are eligible to see). Including: active/live jobs (with their full details, closing date, views/hits stats & application clicks), expired jobs (with their full details, closing date, views/hits stats and the ability to re-advertise again or create a duplicate job based on it) and rejected jobs by the operators and their reason(s) for rejection | E |  |  |  |  |
| R.4.139 | Ability to view/retrieve a unique link to each job | E |  |  |  |  |
| R.4.140 | Employers must have the ability to contact/message the operator internally via the CSMS | E |  |  |  |  |
| R.4.141 | Employers must be able to see the responses from the operator and be notified about it. They must be able to follow it up with further questions or messages if necessary | E |  |  |  |  |
| R.4.142 | Employers must be able to mark a question/query as complete or withdraw it | E |  |  |  |  |
| R.4.143 | Employers should be able to see the history of their communication with the operators |  | D |  |  |  |
| R.4.144 | Employers should be able to report the outcome of the advertised vacancy after it's closed, i.e. X students from that college actually applied and Y were offered/accepted the job |  | D |  |  |  |
| R.4.145 | Academic/other staff must be able to view all vacancies on the system | E |  |  |  |  |
| R.4.146 | Academic/other staff must be able to search and filter vacancies by various criteria including: degree requirements, location(s), industry type(s), job type(s), posting date, closing date, by free text search and by custom criteria | E |  |  |  |  |
| R.4.147 | Academic/other staff must be able to use "and" / "or" for the above search criteria | E |  |  |  |  |
| R.4.148 | Academic/other staff must be able to save the above search/filter criteria and use them again in the future | E |  |  |  |  |
| R.4.149 | Academic/other staff must have the ability to "star"/"favourite" jobs | E |  |  |  |  |
| R.4.150 | Academic/other staff must be able to view/retrieve a unique link to each job that they can bookmark and/or share with their students | E |  |  |  |  |
| R.4.151 | Academic/other staff should have the ability to share saved searches and their results with their students |  | D |  |  |  |
| R.5 | **Placements** | | | | | |
| R.5.0 | Please see the following embedded PDF file for the placements process. Please give a top level overview in the Comments section (the detail will be dealt within the subsequent questions) of how your solution will enable this process and highlight any unique features or benefits that your solution would bring to this process. | E |  |  |  |  |
| R.5.1 | Students must be able to view a list of specific or all placement schemes that they're eligible to view | E |  |  |  |  |
| R.5.2 | Students must be able to "follow" or express an interest in a particular scheme | E |  |  |  |  |
| R.5.3 | Students must be able to search and filter placements | E |  |  |  |  |
| R.5.4 | Students should be able to save search criteria and results (placements/schemes) |  | D |  |  |  |
| R.5.5 | Students must be able to receive relevant notifications when they are following a placement or scheme. Automatic notifications to be sent near the closing date, staff should also be able to generated notifications | E |  |  |  |  |
| R.5.6 | Students must be able to view the placement/scheme timelines, including closing date, start date and finish date | E |  |  |  |  |
| R.5.7 | Students must be able to apply for placements/schemes with the CSMS | E |  |  |  |  |
| R.5.8 | Students must be able to complete an application form, which should be able to include custom fields and submit file attachments (e.g. DOC, DOCX, PDF, RTF) | E |  |  |  |  |
| R.5.9 | Students must be able to tick that they have accepts the terms and conditions, as well as any additional conditions set by the operator | E |  |  |  |  |
| R.5.10 | Students must be able to start an application and save a draft, with the ability to resume completing this application at a later date and submit it | E |  |  |  |  |
| R.5.11 | Students must be able to track the status of the their application and are able to withdraw their application | E |  |  |  |  |
| R.5.12 | Applications made for placements/schemes within the CSMS should be linked to the student profile (visible to operators when viewing the student profile) and to the provider's profile | E |  |  |  |  |
| R.5.13 | Operators must be able to see the student name and link to their profile from the placements application section | E |  |  |  |  |
| R.5.14 | Students must be able to apply for placements via a link to a third party recruitment site | E |  |  |  |  |
| R.5.15 | Students must be able to email the employer to apply if requested | E |  |  |  |  |
| R.5.16 | Students must be able to report a self sourced placements (i.e. one that is sourced outside the CSMS) with all the job details | E |  |  |  |  |
| R.5.17 | Self sourced placements must be linked to the student profile, the placement and the provider's profile so operators can see in the student's profile the placements they have applied to and the outcomes of these applications, and operators must be able to see the student's name in the placement applications section | E |  |  |  |  |
| R.5.18 | The CSMS must be able to collect additional information/paperwork on placements (such as health & safety, DBA, tripartite agreements (signed by student/university/employer)) as well as any other custom fields) from placements advertised through the CSMS or independently sourced placements | E |  |  |  |  |
| R.5.19 | Student should be able to book interviews for placement schemes via the CSMS |  | D |  |  |  |
| R.5.20 | Students should be able to see available interview slots if invited to an interview and book a slot. The booking process should send a calendar invite to the student and send an automated reminder to them nearer the time. |  | D |  |  |  |
| R.5.21 | Students should be able to change/edit/cancel an interview via the CSMS |  | D |  |  |  |
| R.5.22 | Students should be able to submit timesheets for hours worked on placements |  | D |  |  |  |
| R.5.23 | Students must be able to complete and submit feedback/reflection forms before, during and after placements | E |  |  |  |  |
| R.5.24 | Employers must be able to view placement schemes that they have been pre-authorised by operators to see | E |  |  |  |  |
| R.5.25 | Employers must be able to view student applications to placements associated to their employer profile by an operator | E |  |  |  |  |
| R.5.26 | Employers must be able to view the number of views of their placements | E |  |  |  |  |
| R.5.27 | Employers must be able to view the number of applications to their placements | E |  |  |  |  |
| R.5.28 | Employers must be able to add placements to a pre-approved scheme by the operator, adding details of the placement, the number of positions available, and set limits for the number of candidates at each state of the recruitment process | E |  |  |  |  |
| R.5.29 | Employers should be able to review, rank and shortlist applications, as well as reject applications, add notes/comments/feedback on applications. |  | D |  |  |  |
| R.5.30 | Employers should have the ability to offer interviews and placements to candidates, with the option to time limit offers made |  | D |  |  |  |
| R.5.31 | Employers must be able to edit a placement advert they have submitted, changing the details of the placement, extend the closing date or to close application submissions early | E |  |  |  |  |
| R.5.32 | Employers should be able to invite a third party employer to manage application on the CSMS, e.g. their recruitment agency |  | D |  |  |  |
| R.5.33 | Academic staff should be able to mark, rank, shortlist and reject placement applications to placements schemes or particular students they are associated with |  | D |  |  |  |
| R.5.34 | Academic staff should be able to add notes/comments/feedback on applications relating to their assigned student(s) |  | D |  |  |  |
| R.5.35 | Academic staff should be able to see and contribute to incident management relating to their assigned student(s) |  | D |  |  |  |
| R.5.36 | Academic staff should be able to see the status and report on their assigned student(s) via the CSMS |  | D |  |  |  |
| R.5.37 | Operators must be able to view the different placement schemes | E |  |  |  |  |
| R.5.38 | Operators must be able to view students who have followed or expressed an interest, applied for a placement, have been shortlisted or offered the placement | E |  |  |  |  |
| R.5.39 | Operators must be able to search and filter students who have applied for placement (including the ability to see what stage of the application process students are in) or which students are on a placement | E |  |  |  |  |
| R.5.40 | Search results for placement applications and placement students must be filterable by application process stage, course/degree, school/faculty, departments, type (postgraduate taught, postgraduate research, undergraduate, foundation, post doctorate, perspective, graduate) or other characteristic (widening participation background, disability, international/home/EU, gender & on a sandwich/gap year), as well as year of study, year of graduation, career readiness by a student tag/label, or custom label (operator defined) | E |  |  |  |  |
| R.5.41 | Operators must be able to contact all/filtered students by email, in a CSMS notification, push notification | E |  |  |  |  |
| R.5.42 | Operators must be able to filter and view students on a particular placement to see: their placement progress, start/end dates, the stage they're at and the status of their application | E |  |  |  |  |
| R.5.43 | Operators must be able to see all applications for system-hosted placements and self-sourced placements | E |  |  |  |  |
| R.5.44 | Operators must be able to restrict student personal details from sub groups of operators | E |  |  |  |  |
| R.5.45 | Operators must be able to create placement schemes, including scheme titles, details, descriptions and which operator group(s) can view/use it | E |  |  |  |  |
| R.5.46 | Operators must be able to set restrictions on the visibility of placement schemes | E |  |  |  |  |
| R.5.47 | Visibility of schemes to be able to be limited by characteristic on student profile: course/degree, school/faculty, departments, type (postgraduate taught, postgraduate research, undergraduate, foundation, post doctorate, perspective, graduate) or other characteristic (widening participation background, disability, international/home/EU, gender & on a sandwich/gap year), as well as year of study, year of graduation, career readiness by a student tag/label, or custom label (operator defined) | E |  |  |  |  |
| R.5.48 | Visibility of schemes to be limited by activity student has completed on the CSMS including attending certain event(s), appointment(s)/appointment type(s), completed certain job(s)/placement(s), completed their profile or certain fields on their profile | E |  |  |  |  |
| R.5.49 | Visibility of schemes to be limited by combinations or characteristics or activities, including a "with and/or" option | E |  |  |  |  |
| R.5.50 | Operators must be able to release schemes on the spot or release them on a particular day | E |  |  |  |  |
| R.5.51 | Operators should be able to release schemes to different groups at different dates/times |  | D |  |  |  |
| R.5.52 | Operators must be able to create/edit/archive/delete placements, including titles, descriptions, set closing and start dates, have the ability to combine the closing and expiry dates, set expected interview dates, select which students can view the placement | E |  |  |  |  |
| R.5.53 | Operators must be able to review employer submitted placements before they go live, with the ability to accept, amend or reject adverts | E |  |  |  |  |
| R.5.54 | The CSMS will notify an employer if their placement has been rejected and will allow for comments/feedback from the operator to be included | E |  |  |  |  |
| R.5.55 | Operators must be able to pre-authorise employers and/or employer contacts to submit placements to a specific scheme | E |  |  |  |  |
| R.5.56 | Operators must be able to set the application method, including setting an limit on the number of applications, which application fields need to be completed, allow students to upload attachments and set internal dates and deadlines | E |  |  |  |  |
| R.5.57 | Operators must be able to set/select the stages for shortlisting and which operators/employers should be able to view which stage | E |  |  |  |  |
| R.5.58 | Operators must be able to set application process layers to allow certain groups of operators to approve/add extra fields/information before the application form can be published, view and approve applications before they go to an employer, to be able to involve employers in the selection process to accept/reject candidates (and add extra notes/fields), to customise any of the previous steps | E |  |  |  |  |
| R.5.59 | Operators must be able to set the application method to link to an external website or for candidates to email the employer | E |  |  |  |  |
| R.5.60 | Operators must be able to add documents and images to placement adverts | E |  |  |  |  |
| R.5.61 | Placement adverts will automatically be connected to their an existing or new employer profile. If the employers is new the operator should be able to complete the employer profile on the spot | E |  |  |  |  |
| R.5.62 | Operators must be able to control which students can view each placement. The restrictions can be set to none, particular group of students/graduates by: course/degree, school/faculty, department, type (postgraduate taught, postgraduate research, undergraduate, post doctorate, perspective, graduate), year of study, year of graduation, student tags/labels, career readiness statement, other attributes (widening participation background, disability, gender & on a sandwich/gap year) and any other custom fields as set by the operator, or a combination of the above attributes (with an and/or option) | E |  |  |  |  |
| R.5.63 | CSMS must support rich text editor for some of the fields on the placement and scheme details | E |  |  |  |  |
| R.5.64 | Operators must be able to release each placement on the spot or release them on a particular day | E |  |  |  |  |
| R.5.65 | Operators should be able to release each placement to different groups at different dates/times |  | D |  |  |  |
| R.5.66 | Operators must be able to see notes and tasks that are only visible to other operators | E |  |  |  |  |
| R.5.67 | Tasks should be able to be assigned to self/other operators, who can be tagged in these tasks/comments |  | D |  |  |  |
| R.5.68 | Operators must have the ability to assign the placement to a particular operator(s) or a group of operators | E |  |  |  |  |
| R.5.69 | Operators must be able to set a maximum number of applications for students per placements and scheme (default is one) | E |  |  |  |  |
| R.5.70 | Operators must be able to manage self-sourced placements and those applied for via the CSMS, on behalf of a student, including accepting self source placements submissions, completing an application form with the job details, completing additional information/paperwork (e.g. health & safety, DBS, tripartite agreement (student/university/employer), any other custom field, and also be able to withdraw an application. Operators must be able to link it to an existing or new employer on the CSMS | E |  |  |  |  |
| R.5.71 | Operators must be able to manage placements (both self-sourced and those applied for through the CSMS), including the ability to export all applications for a placement as a single PDF or zip file with all attachments. Applications can be filterable by scheme/status/start or completion date/student details | E |  |  |  |  |
| R.5.72 | Operators should have the ability to receive & review timesheets submitted by students on placements and the ability to submit the timesheets on their behalf |  | D |  |  |  |
| R.5.73 | Operators must be able to view all self-sourced placements applications on the system (without having to download them) and filter them by scheme/status/closing date/student details | E |  |  |  |  |
| R.5.74 | Operators must be able to view all applications on the system (without having to download them) | E |  |  |  |  |
| R.5.75 | Operators must be able to share applications with the employer/other operators or operator groups/academic staff or personal tutor | E |  |  |  |  |
| R.5.76 | Operators must be able to mark applications by adding notes and shortlisting candidates. Notes can be operator viewable only, and/or shared with the student/employer (operator to share in this case). Students to be notified of the shortlisting by email/in-CSMS notification/text/SMS/push notification with the ability to include the student viewable notes/comments in the notification | E |  |  |  |  |
| R.5.77 | Operators should be able to mark applications by adding scores and candidate rankings (with the option to make all of this visible to employers) |  | D |  |  |  |
| R.5.78 | Operators should be able to set interview dates and book rooms for these interviews, which shortlisted students should be able to view and book |  | D |  |  |  |
| R.5.79 | Operators should be able to see which students have booked interview slots, book students into interview slots themselves, cancel an interview slot, print an interview schedule and mark students as arrived/attended/missed for their interview |  | D |  |  |  |
| R.5.80 | Operators must be able to define the recruitment stages and the shortlisting processes within the CSMS, e.g. using one or all of the functionalities mentioned above | E |  |  |  |  |
| R.5.81 | Operators must be able to notifying students of placement application outcomes by email/in system notification/text/SMS/push notifications, including signposting further help/alternative opportunities in these messages | E |  |  |  |  |
| R.5.82 | Operators must be able to make offers to a student, adding comments or custom text to the offer, and see when a student accepts/rejects the offer | E |  |  |  |  |
| R.5.83 | Operators must be able to reject a self-sourced placement submission by a student, notifying by email/in system notification/text/SMS/push notification. Operators must be able to add feedback and share it with the student | E |  |  |  |  |
| R.5.84 | Operators must be able to see the outcome from any student (accept or rejects the offer) and any additional feedback/comments they have added | E |  |  |  |  |
| R.5.85 | Operators should be able to make placement offers to students which can be time limited |  | D |  |  |  |
| R.5.86 | Operators should be able to share /push/integrate the placement with a link back to the placement via the VLE, social media, RSS feed |  | D |  |  |  |
| R.5.87 | Operators must be able to mark applications for both self-sourced, and placements applied through via the CSMS, as complete | E |  |  |  |  |
| R.5.88 | Operators must be able to send reminders and custom notifications to students on or who have completed a placement | E |  |  |  |  |
| R.5.89 | Operators should be able to pre-authorise employers and/or contacts to submit placements directly to a specific scheme (without operator's approval) |  | D |  |  |  |
| R.5.90 | Operators should be able to manage incidents via CSMS for students on placements, e.g. quickly identifying via the CSMS students on placements by locations (UK locations - cities, countries, UK-wide option, worldwide locations - countries and major cities) and/or by employer(s) |  | D |  |  |  |
| R.5.91 | Operators should be able to quickly see /retrieve the students contact details (personal email & phone number, on-placement email/phone number/address, placement supervisor email and next of kin) |  | D |  |  |  |
| R.5.92 | Operators should be able to contact students via email, CSMS, SMS/text, push notification regarding any incident |  | D |  |  |  |
| R.5.93 | Operators should be able to mark a student as safe, including adding details of the last contact point and any additional notes |  | D |  |  |  |
| R.5.94 | Operators should be able to mark students as unable to reach and must be able to identify these students again quickly |  | D |  |  |  |
| R.5.95 | Operators must be able to report on the number views of a placement advert by total and unique views, views by department/course/student type/year, as well as the number of application/email clicks | E |  |  |  |  |
| R.5.96 | Operators must be able to report on placements by scheme, organisation, type, self-sourced placements, industry type(s), posting and closing dates (with the option of searching a specific date range), placement start/end dates, by academic department/school, by academic supervisor/personal tutor, by free text or custom criteria | E |  |  |  |  |
| R.5.97 | Operators must be able to report on the source of the placement, e.g. added by operators/employers/via CSMS network/student (for self-sourced placements) | E |  |  |  |  |
| R.5.98 | Operators must be able to report on placements by outcome: shortlisted/withdrawn/offered/successful/rejected/unsuccessful/complete | E |  |  |  |  |
| R.5.99 | Operators must be able to report on placement by location: UK-based locations (cities, counties, UK-wide option) and worldwide locations (countries, major cities) | E |  |  |  |  |
| R.6 | **Awards/Pathways** | | | | | |
| R.6.0 | Please see the following embedded PDF file for the Awards / Pathways process. Please give a top level overview in the Comments section (the detail will be dealt within the subsequent questions) of how you solution will enable this process and highlight any unique features or benefits that your solution would bring to this process. | E |  |  |  |  |
| R.6.1 | Students must be able to view, search, filter and save different pathways they are eligible for and view the pathways details, timelines (e.g. closing/start/finish dates) and list of activities associated with the pathways | E |  |  |  |  |
| R.6.2 | Students should be able to "follow"/express an interest in a pathway and receive relevant notifications |  | D |  |  |  |
| R.6.3 | Students must be able to receive relevant notifications near the pathway closing date (if there is one) and staff generated notifications for specific pathways | E |  |  |  |  |
| R.6.4 | Students must be able to apply/sign up for pathways via the CSMS, via any additional custom forms/fields/surveys and be able to upload an attachment (DOC/DOCX/PDF/RTF) to the application form if required | E |  |  |  |  |
| R.6.5 | Students must be able to start an application and save it as a draft, resuming/completing it at a later date | E |  |  |  |  |
| R.6.6 | The CSMS will automatically match the pathway's criteria and objective to activities that a student has already completed/needs to complete on the CSMS | E |  |  |  |  |
| R.6.7 | Once a pathway has been signed up to/applied to the CSMS will allow operators to see which pathways that students have applied to and the pathway outcome via their profile or the pathways applications section | E |  |  |  |  |
| R.6.8 | Students must be able to apply for more than one pathway as long as they meet the eligibility requirements | E |  |  |  |  |
| R.6.9 | Students must be able to manage their existing applications for pathways, tracking the status of their applications, as well as withdrawing applications and accepting/rejecting offers | E |  |  |  |  |
| R.6.10 | If a pathway requires the student to be interviewed, the student should be able to see and book available interview slots, as well as change or cancel an interview. The CSMS will send calendar invitation to the student when they have booked an interview slot and send reminders to them nearer the time |  | D |  |  |  |
| R.6.11 | Students should be able to record and submit timesheets for activities required on the pathway |  | D |  |  |  |
| R.6.12 | Students must be able to mark activities completed outside the CSMS as complete or in progress | E |  |  |  |  |
| R.6.13 | Students must be able to add notes to their pathways, either only viewable to themselves or also viewable by operators | E |  |  |  |  |
| R.6.14 | Students must be able to complete and submit feedback/reflection forms; before the start of activities, during the activities and after the completion of activities | E |  |  |  |  |
| R.6.15 | Academic/personal tutors must be able to view students assigned to them and the activities they are undertaking within a pathway | E |  |  |  |  |
| R.6.16 | Academic/personal tutors must be to mark their students' awards activities as complete (if they have the right permissions) and to add notes/comments/feedback to activities | E |  |  |  |  |
| R.6.17 | Academic/personal tutors must be able to see the status and reports of students assigned to them | E |  |  |  |  |
| R.6.18 | External staff/mentors must be able to view students assigned to them and the activities they are undertaking within a pathway | E |  |  |  |  |
| R.6.19 | External staff/mentors should be to mark their students' awards activities as complete (if they have the right permissions) and to add notes/comments/feedback to activities |  | D |  |  |  |
| R.6.20 | External staff/mentors must be able to see the status and reports of students assigned to them | E |  |  |  |  |
| R.6.21 | Operators must be able to view available pathways, search & filter pathways, see a list of students who have applied to these pathways, and track/see the current status of these students | E |  |  |  |  |
| R.6.22 | Operators must be able to filter the students who have applied by: course/degree, school/faculty, departments, type (postgraduate taught, postgraduate research, undergraduate, post doctorate, perspective, graduate), other factor (widening participation background, disability, international/home/EU, gender & on a sandwich/gap year), year of study, year of graduation, career readiness, student tag/label, custom (operator defined), based on activities completed within the CSMS (e.g. attended specific events/appointments, completed their profile/fields on their profile/placements/jobs | E |  |  |  |  |
| R.6.23 | Operators must be able to create/edit/archive/delete bespoke pathways for different cohorts of students | E |  |  |  |  |
| R.6.24 | Operators must be able to set the pathway details (title/description/start and end date (or the option to have ongoing pathways - no closing date) | E |  |  |  |  |
| R.6.25 | Operators must be able to set the required activities and objectives within each pathway including attending an appointment/specific appointment type, attended an event, completed a placement, completed a set of volunteering or work hours, completed a custom form/survey, completed another pathway, completed an operator custom criteria (e.g. tick boxes for activities outside of the CSMS), completion of modules on a VLE | E |  |  |  |  |
| R.6.26 | Operators must be able to set up "external mentor" operator profiles, assigning students and pathways to them, and allowing them to see the activities of these students, along with certain details of their profiles | E |  |  |  |  |
| R.6.27 | Pathways can be restricted by any of the following, a combination of or excluding: course/degree, school/faculty, departments, type (postgraduate taught, postgraduate research, undergraduate, post doctorate, perspective, graduate), other factor (widening participation background, disability, international/home/EU, gender & on a sandwich/gap year), year of study, year of graduation, career readiness, student tag/label, custom (operator defined), based on activities completed within the CSMS (e.g. attended specific events/appointments, completed their profile/fields on their profile/placements/jobs | E |  |  |  |  |
| R.6.28 | Operators must be able to export all applications for a pathway as a single PDF file or as a zip file with any attachments to applications included | E |  |  |  |  |
| R.6.29 | Operators must be able to view pathway applications and filter by pathway/status/closing date/student details | E |  |  |  |  |
| R.6.30 | Operators must be able to mark pathways applications (adding notes that are only viewable to operators, notes that are viewable to students and/or external mentors) | E |  |  |  |  |
| R.6.31 | Operators must be able to shortlist pathway candidates, defining the recruitment stage, inviting candidates to interview, add student viewable notes/comments and notifying them by email/in system notification/text/SMS/push notifications | E |  |  |  |  |
| R.6.32 | Operators must be able to reject pathway candidates, with the ability to add student viewable feedback/comments, ability to signpost the student to alternative opportunities/resources/further help and notifying them by email/in system notification/text/SMS/push notifications | E |  |  |  |  |
| R.6.33 | Operators should be able to set interview dates or specific pathways and book rooms for these interviews |  | D |  |  |  |
| R.6.34 | Operators should be able to see which students have booked interview slots, book students into interview slots themselves, cancel an interview slot, print an interview schedule and mark students as arrived/attended/missed for their interview |  | D |  |  |  |
| R.6.35 | Operators must be able to mark applications/pathways as complete | E |  |  |  |  |
| R.6.36 | Operators must be able to make pathway offers to students, adding in custom text/comments to these offers. These offers can be time limited | E |  |  |  |  |
| R.6.37 | Operators should be able to share/push/integrate the placement with a link back to the placement via the VLE, social media, RSS feed |  | D |  |  |  |
| R.6.38 | Operators must be notified when student accept/reject a pathway offer and any additional comments/feedback they have added | E |  |  |  |  |
| R.6.39 | Operators must be able to accept a pathway activity submission from students who have been accepted to a pathway and notify the student of this via email/in system notification/text/SMS/push notification | E |  |  |  |  |
| R.6.40 | Operators must be able to link activities to existing or new employers on the CSMS | E |  |  |  |  |
| R.6.41 | Operators must be able to reject an activity submission by a student, with the option to include feedback to the student, and notifying them via email/in system notification/text/SMS/push notification | E |  |  |  |  |
| R.6.42 | Operators must be able to send reminders and custom notifications to students who are currently active on the pathway or who have completed a pathway | E |  |  |  |  |
| R.6.43 | Operators must be able to request feedback/survey upon activity/pathway completion | E |  |  |  |  |
| R.6.44 | Operators must be able to report on pathway registrations differentiating between self registration and those authorised by an operator | E |  |  |  |  |
| R.6.45 | Operators must be able to report on pathways tasks (completed/uncompleted), stage/status, free text, custom criteria, pathways, activities or by student attribute - course/degree, school/faculty, departments, type (postgraduate taught, postgraduate research, undergraduate, post doctorate, perspective, graduate), other factor (widening participation background, disability, international/home/EU, gender & on a sandwich/gap year), year of study, year of graduation, career readiness, student tag/label, custom (operator defined) | E |  |  |  |  |
| R.6.46 | Operators must be able to report on the number of views of a pathway by total and unique views | E |  |  |  |  |
| R.7 | **Communication** | | | | | |
| R.7.0 | Please see the following embedded PDF file for the communications process. Please give a top level overview in the Comments section (the detail will be dealt within the subsequent questions) of how your solution will enable this process and highlight any unique features or benefits that your solution would bring to this process. | E |  |  |  |  |
| R.7.1 | Operators must be able to communicate through the CSMS messaging system, with certain employers / students / graduates and other operators | E |  |  |  |  |
| R.7.2 | Operators must be able to receive communication/questions through the CSMS messaging system from other users of the system and respond to them | E |  |  |  |  |
| R.7.3 | Operators should be able to set up and use pre-set responses particularly with employers and students, for commonly asked questions |  | D |  |  |  |
| R.7.4 | Operators should be able to mark an incoming communications item in the CSMS messaging system as read or being locked /dealt with by a particular operator |  | D |  |  |  |
| R.7.5 | Employers / contacts must be able to use the CSMS messaging system to ask questions, see responses and follow them up, with the history of their communications shown on their individual contact profile | E |  |  |  |  |
| R.7.6 | Students / graduates must be able to use the CSMS messaging system to ask questions, see responses and follow them up, with the history of their communications shown on their individual contact profile | E |  |  |  |  |
| R.7.7 | The in CSMS messaging system needs to be simple i.e in plain text | E |  |  |  |  |
| R.7.8 | The in CSMS messaging system must be able to attach files to a message where accepted formats are PDF, DOCX, DOC, JPEG, PNG, PPTX, PPT and RTF | E |  |  |  |  |
| R.7.9 | The in-CSMS messaging system must have the functionality where the recipient is notified of new incoming messaging via an in-CSMS notification and users must be able to see the history of their own communication that they have raised and received | E |  |  |  |  |
| R.7.10 | Operators must be able to send bulk emails to students / graduates by custom groups which can be saved per operator | E |  |  |  |  |
| R.7.11 | Operators should be able to share the saved groups with other select operator(s) as long as they have permissions to send bulk emails |  | D |  |  |  |
| R.7.12 | Operators must be able to send bulk emails to all students who are on the system as long as they haven’t opted out from receiving bulk emails and be able to filter and bulk email a select group of students | E |  |  |  |  |
| R.7.13 | Operators must be able to send bulk emails to students where they can save and reuse search / filtering criteria which include course / degree, school / faculty, departments; type: postgraduate taught, postgraduate research, undergraduate, post doctorate, perspective, graduate; other: widening participation background, disability, international/home/EU, gender & on a sandwich/gap year; year or study, year of graduation, career readiness, by student tag / label, custom (operator defined), used / logged in the CSMS | E |  |  |  |  |
| R.7.14 | Operators must be able to see the history of bulk emails sent to students / graduates | E |  |  |  |  |
| R.7.15 | Operators must be able to see track bulk emails sent to students / graduates by successful delivery, by open rate (total and unique), by link clicks and by sender(s) | E |  |  |  |  |
| R.7.16 | Operators must be able to customise bulk emails sent to students / graduates using Rich text and / or HTML, be able to embed images, be able to use smart fields i.e. hello [first name] | E |  |  |  |  |
| R.7.17 | Operators should be able to create bulk emails and their templates by dragging and dropping components and content types into it |  | D |  |  |  |
| R.7.18 | Operators must be able to re-use a previous bulk email / pre-set template when emailing students/graduates | E |  |  |  |  |
| R.7.19 | Operators must be able to bulk email students / graduates who have booked to attend a particular event, bulk email all students who are on the waiting list of a particular event, bulk email students who have attended a particular event and bulk email students who have missed a particular event | E |  |  |  |  |
| R.7.20 | Operators must be able to bulk email students / graduates who have expressed an interest / starred a particular vacancy |  | D |  |  |  |
| R.7.21 | Operators should be able to select / enter which email address the bulk email to students / graduates is sent from and define the reply to email address that could be different than the above |  | D |  |  |  |
| R.7.22 | Operators should be able to add attachments / files to bulk emails sent to students / graduates (or host them on the CSMS and include a link to them on the bulk email) |  | D |  |  |  |
| R.7.23 | Bulk emails must be responsive and viewable on smart phones, tablets, different screen sizes etc | E |  |  |  |  |
| R.7.24 | Operators must be able to send bulk emails to employers where the default is send to primary contact with the option to send to all associated contacts and the option to send to different groups of contacts i.e. events liaison by tag | E |  |  |  |  |
| R.7.25 | Operators should be able to send bulk emails to employers by custom groups where groups can be saved per operator, and saved groups should be shared with other select operator(s) |  | D |  |  |  |
| R.7.26 | Operators must be able to send bulk emails to employers and email all employers who are on the system as long as they haven’t opted out from receiving bulk emails | E |  |  |  |  |
| R.7.27 | Operators must be able to send bulk emails to employers where they can filter and bulk email a select group of employers | E |  |  |  |  |
| R.7.28 | Operators should be able to send bulk emails to employers with the ability to save and reuse search / filtering criteria by company size, employer tags, location(s), industry type(s), contact tag; activity: advertising vacancies with us, hosted events with us, booked / attended employer bookable events, used / logged in the CSMS and custom criteria |  | D |  |  |  |
| R.7.29 | Operators must be able to send bulk emails to employers where they can see the history of bulk emails sent, including the sender and the sending date/time | E |  |  |  |  |
| R.7.30 | Operators must be able to track bulk emails sent to employers by successful delivery, by open rate (total & unique) and by link clicks | E |  |  |  |  |
| R.7.31 | Operators must be able to customise bulk emails sent employers using Rich text and / or HTML, be able to embed images, be able to use smart fields i.e. hello [first name] | E |  |  |  |  |
| R.7.32 | Operators must be able to re-use a previous bulk email / pre-set template when emailing employers | E |  |  |  |  |
| R.7.33 | Operators must be able to send bulk emails to employers who have expressed an interest to attend an employer bookable event, employers who booked to attend an employer bookable event, employers who have attended an employer bookable event, and employer who have missed an employer bookable event that they were booked to attend | E |  |  |  |  |
| R.7.34 | Operators should be able to select / enter which email address the bulk email to employers is sent from and define the reply to email address that could be different than the above |  | D |  |  |  |
| R.7.35 | Operators should be able to add attachments / files to bulk emails sent to employers (or host them on the CSMS and include a link to them on the bulk email) |  | D |  |  |  |
| R.7.36 | Operators must be able to report on the above by demographics of recipients | E |  |  |  |  |
| R.7.37 | Students / graduates must be able to opt in / out of bulk emails and be able to see the previous communication that was sent to them | E |  |  |  |  |
| R.7.38 | Employers must be able to opt in / out of bulk emails and be able to see the previous communication that was sent to them | E |  |  |  |  |
| R.7.39 | Employers should be able to select bulk emails to be sent on their behalf for a specific group of students, for attendees / booked students to attend their event and for students who have starred their vacancies / placements etc |  | D |  |  |  |
| R.7.40 | Operators must be able to see all notification categories of system generated notification emails and be able to switch each notification category on & off | E |  |  |  |  |
| R.7.41 | Operators must be able to customise each notification template for system generated notification emails using plain text, Rich text and / or HTML (via WYSIWYG editor), with the ability to embed images, and the ability to use smart fields i.e. hello [first name] | E |  |  |  |  |
| R.7.42 | Operators must be able to see and revert back to the original notification template for system generated notification emails | E |  |  |  |  |
| R.7.43 | Operators should be able to create new custom categories and assign notification templates to them |  | D |  |  |  |
| R.7.44 | Operators should be able to see the stats via system generated notifications sent including the number sent in each category, the number opened / viewing and the number of links clicked |  | D |  |  |  |
| R.7.45 | Students / graduates must be able to receive custom notifications generated by the system and be able to opt out of certain notifications have the ability to receive customised notifications | E |  |  |  |  |
| R.7.46 | Students / graduates must be able to opt in / out of daily and weekly digest emails (default is opted out) for vacancies, events and placements. They must have the ability to customise the preferences for each of these, e.g. setting up specific criteria for vacancies, events and placements that will be included on those digests | E |  |  |  |  |
| R.7.47 | Students / graduates should be able to set instant custom email alerts for when a vacancy, event or placement that meet specific criteria that they've set is published on the CSMS |  | D |  |  |  |
| R.7.48 | Operators must be able to send push notifications to the CSMS's App that are automated | E |  |  |  |  |
| R.7.49 | Operators should be able to customise and filter specific groups of students or employers and target them with custom push notifications |  | D |  |  |  |
| R.7.50 | Operators should be able to see the stats of the push notifications |  | D |  |  |  |
| R.7.51 | Students /graduates must be able to opt in / out of receiving push notifications via the app notification settings | E |  |  |  |  |
| R.7.52 | Operators must be able to have the same functionality as above for app notifications but via text messages |  | D |  |  |  |
| R.7.53 | Students /graduates should be able to opt in / out of receiving text notifications |  | D |  |  |  |
| R.8 | **Surveys/Feedback/Custom Forms** | | | | | |
| R.8.0 | Please see the following embedded PDF file for the survey / feedback / custom forms process. Please give a top level overview in the Comments section (the detail will be dealt within the subsequent questions) of how your solution will enable this process and highlight any unique features or benefits that your solution would bring to this process. | E |  |  |  |  |
| R.8.1 | Operators must be able to create, read, update and delete feedback forms & templates and custom forms | E |  |  |  |  |
| R.8.2 | Operators must be able to assign those feedback forms and templates to events, appointments, vacancies, placements and awards | E |  |  |  |  |
| R.8.3 | Operators must be able to assign the feedback form to an one-off event, bulk assign to multiple events, a series of events, particular event type(s) and to any user group to complete (i.e. students, graduates and employers) | E |  |  |  |  |
| R.8.4 | Operators must be able to assign the feedback form to an one-off job advert, bulk assign to multiple jobs, series of jobs, particular job type(s) and to any user group to complete (i.e. students, graduates and employers) | E |  |  |  |  |
| R.8.5 | Operators must be able to assign the feedback form to an one-off placement, bulk assign to multiple placements, placement scheme, self-sourced placements and to any user group to complete (i.e. students and employers) | E |  |  |  |  |
| R.8.6 | Operators must be able to assign the feedback form at different stages of the same placement, i.e. at the beginning, middle and end of the placements | E |  |  |  |  |
| R.8.7 | Operators must be able to assign the feedback form to an one-off appointment, bulk assign to multiple appointments, particular appointment type(s) and to a series of appointments (by adviser, date range and/or location) | E |  |  |  |  |
| R.8.8 | Operators must be able to assign the feedback form at different stages of the same award/pathway, i.e. at the beginning, middle and end | E |  |  |  |  |
| R.8.9 | Operators must be able to assign the feedback/custom form directly to student/graduate profile by direct assignment or bulk assign (operators must be able to search and filter students before selecting the group of students to assign it to them) | E |  |  |  |  |
| R.8.10 | Operators must be able to assign the feedback/custom form directly to employer contacts accounts by direct assignment or bulk assign (operators must be able to search and filter employer contacts before selecting the group of contacts to assign it to them) | E |  |  |  |  |
| R.8.11 | Operators must be able to set the release time for the feedback/custom forms which could be: as soon as it's assigned, straight after the assigned activity, after a pre-set number of hours after completing the activity or after a pre-set number of days after completing the activity | E |  |  |  |  |
| R.8.12 | Operators must be able to create different data types in each feedback form, including (but not limited to): text fields, long text/memo, radio buttons, checklist, dropdown menu (with option of one selection or multiple), file upload and star rating | E |  |  |  |  |
| R.8.13 | Operators must be able to view and filter the results of any feedback and custom forms | E |  |  |  |  |
| R.8.14 | Operators must be able to track and report on any surveys/feedback/custom forms completed | E |  |  |  |  |
| R.8.15 | Operators must be able to print and export the results of any feedback/survey or custom form as PDF, CSV, XLSX, XLS, DOC and DOCS | E |  |  |  |  |
| R.8.16 | Operators must have the ability to set a custom form as mandatory and the assignees won't be able to use the CSMS unless the form is completed | E |  |  |  |  |
| R.8.17 | Students/graduates must be able to complete the feedback and custom forms that are assigned to them | E |  |  |  |  |
| R.8.18 | Employer contacts must be able to complete the feedback and custom forms that are assigned to them | E |  |  |  |  |
| R.9 | **Reporting** | | | | | |
| R.9.0 | Please see the following embedded PDF file for the reporting process. Please give a top level overview in the Comments section (the detail will be dealt within the subsequent questions) of how your solution will enable this process and highlight any unique features or benefits that your solution would bring to this process. | E |  |  |  |  |
| R.9.1 | College operators must be able to report on all aspects of vacancies on their local college system in particular job views: total views, unique hits, application clicks, "starred"/"favourited" jobs and their viewers breakdown & demographics | E |  |  |  |  |
| R.9.2 | College operators must be able to report on the sources of all vacancies and whether they've been added by the operators, submitted by the employers or came via the CSMS own network | E |  |  |  |  |
| R.9.3 | College operators must be able to report on locations of all the jobs advertised including their country, county/region and city/town breakdown | E |  |  |  |  |
| R.9.4 | College operators must be able to report on the jobs advertise by industry type(s), posting date, job type(s), closing date (with the ability to filter in/out the expired jobs) and by any other custom fields or criteria created by the operator | E |  |  |  |  |
| R.9.5 | College operators must be able to report on all employers and contacts on the system and their activity/engagement with the CSMS and other user groups | E |  |  |  |  |
| R.9.6 | College operators must be able to report on students engagement with employers by: department, school/faculty, course/degree, type of student, year of study, student tag(s), employer profile views, "starring"/"favouriting" employers and other criteria as set by the operator | E |  |  |  |  |
| R.9.7 | College operators must be able to report on all employers and contacts engagement with CSMS by: employer type, contact type, industry, employer & contact tag(s), location, company size, activity (logged into the system, posted vacancies & placements, hosted or attended events, contacted the operators via the in-system CSMS | E |  |  |  |  |
| R.9.8 | Ability to report on the source of employer and contact profiles, whether they were added by operators or posted by the employer/contact, and who added them and when | E |  |  |  |  |
| R.9.9 | College operators must be able to report on all events on their local college system | E |  |  |  |  |
| R.9.10 | College operators must be able to report on employer demographics for attending and hosting events | E |  |  |  |  |
| R.9.11 | College operators must be able to report on students & graduates demographics for booking and attending events | E |  |  |  |  |
| R.9.12 | College operators must be able to report on attendance of their events (inc. bookings, attendance, missed, cancelled and attendance without booking) | E |  |  |  |  |
| R.9.13 | College operators must be able to report on all appointments that are hosted and managed by the CSMS including by student demographics and appointment types | E |  |  |  |  |
| R.9.14 | College operators must be able to report on the attendance for each appointment, including those completed, cancelled and missed | E |  |  |  |  |
| R.9.15 | College operators must be able to report on the appointment's actual length, outcome and follow up actions by the student/graduate | E |  |  |  |  |
| R.9.16 | College operators must be able to report on students & graduates demographics for booking and attending events | E |  |  |  |  |
| R.9.17 | College operators must be able to report on attendance of their events (inc. bookings, attendance, missed, cancelled and attendance without booking) | E |  |  |  |  |
| R.9.18 | College operators must be able to report on user groups engagement with the system in particular students & graduates including whether they've logged into the CSMS and when were their most recent visits | E |  |  |  |  |
| R.9.19 | College operators must be able to report on the in-system job applications (for in-CSMS management applications) including the details and demographics of the students/graduates who have been shortlisted, withdrawn their application, offered the job, accepted the job, rejected the job and unsuccessful | E |  |  |  |  |
| R.9.20 | College operators must be able to report on how the students/graduates found vacancies, i.e. whether they've navigated through the vacancies or employers section, bulk email received from the CSMS, via a direct link or by searching on the CSMS | E |  |  |  |  |
| R.9.21 | College operators should be able to report on the self-reported outcome by the students/graduates/employer for the non-CSMS managed vacancies |  | D |  |  |  |
| R.9.22 | College operators must be able to report on events attendance by the students, which events they've attended, and whether they've attended, cancelled, missed or attended without booking | E |  |  |  |  |
| R.9.23 | College operators must be able to report on how the students/graduates found events, i.e. whether they've navigated through the events or employers section, bulk email received from the CSMS, via a direct link or by searching on the CSMS | E |  |  |  |  |
| R.9.24 | College operators must be able to report on all placements on their local college system | E |  |  |  |  |
| R.9.25 | College operators must be able to report on the in-system placements applications (for in-CSMS management applications) including the details and demographics of the students/graduates who have been shortlisted, withdrawn their application, offered the placements, accepted the placement, rejected the placement, unsuccessful and completed their placement | E |  |  |  |  |
| R.9.26 | College operators must be able to report on how the students/graduates found placements, i.e. whether they've navigated through the placements or employers section, bulk email received from the CSMS, via a direct link or by searching on the CSMS | E |  |  |  |  |
| R.9.27 | College operators must be able to report on the self-reported outcome by the students/graduates/employer for the non-CSMS managed placements | E |  |  |  |  |
| R.9.28 | College operators must be able to report on the start/finish dates for the completed placements and the status of their paperwork | E |  |  |  |  |
| R.9.29 | College operators must be able to report on all awards/pathways on their local college system | E |  |  |  |  |
| R.9.30 | College operators must be able to report on awards/pathways registrations and whether they are self registrations or done by the operators | E |  |  |  |  |
| R.9.31 | College operators must be able to report on all tasks on the system (and whether they've been completed or not) and all stages/statuses | E |  |  |  |  |
| R.9.32 | College operators must be able to report on the number of views including (total hits, unique views & application link/email clicks) | E |  |  |  |  |
| R.9.33 | College operators must be able to report on each pathway activity and the associated student demographics | E |  |  |  |  |
| R.9.34 | College operators must be able to report on all communications that are handled/done by the CSMS on their local college | E |  |  |  |  |
| R.9.35 | College operators must be able to report on system notifications, how effective they are, opt ins and opt outs | E |  |  |  |  |
| R.9.36 | College operators must be able to report on events, vacancies and placements email alerts including their delivery, open rates, links click through and further actions by the recipients as a result of this email (i.e. opting out or applying for a job/event/placement) | E |  |  |  |  |
| R.9.37 | College operators must be able to report on the in-system messaging functionality of the CSMS including the number of the questions raised, how long did it took to respond to queries, number of questions, responses and how did the advisers preform in dealing with them | E |  |  |  |  |
| R.9.38 | College operators must be able to report on the in-system notifications and their effectiveness, including the number of notifications sent, received, viewed and what next actions were taken as a result | E |  |  |  |  |
| R.9.39 | College operators must be able to report on the app/push & SMS/text notifications and their effectiveness, including the number of notifications sent, viewed and what next actions were taken as a result | E |  |  |  |  |
| R.9.40 | College operators must be able to report on student details and their demographics including (but not limited to): course/degree, school/faculty, department, type (postgraduate taught, postgraduate research, undergraduate, post doctorate, perspective, graduate), year of study, year of graduation, student tags/labels, career readiness statement, other attributes (widening participation background, disability, gender & on a sandwich/gap year) and any other custom fields as set by the operator | E |  |  |  |  |
| R.9.41 | College operators should be able to report on students searches & trends on the CSMS, i.e. most popular keywords, number of times they were searched, most popular results and most clicked on |  | D |  |  |  |
| R.9.42 | Ability to report on custom fields and custom criteria | E |  |  |  |  |
| R.9.43 | Central team operators must be able to report on all of the above for all TCG colleges collectively and for select college(s) at the time | E |  |  |  |  |
| R.9.44 | Central team operators should be able to build operator-specific datasets from different colleges and databases and save those custom built datasets for re-use later |  | D |  |  |  |
| R.9.45 | Central team operators should be able to share the above custom-built datasets with other central team operators |  | D |  |  |  |
| R.9.46 | Central team operators should be able to share the above custom-built datasets with college operators, however college operators should only see the report but not the data behind it in this case, with limitation to other college's data |  | D |  |  |  |
| R.9.47 | Central team operators should be able to link multiple datasets from different colleges and databases |  | D |  |  |  |
| R.9.48 | Central team operators must be able to report on all JobOline jobs and employers in the same way as college operators can do above but on a TCG wide level | E |  |  |  |  |
| R.9.49 | The CSMS must integrate with and support 3rd party Business Intelligence tools, specifically PowerBI and similar tools | E |  |  |  |  |
| R.9.50 | The CSMS must have accessible in-system data visualisation and business intelligence tools | E |  |  |  |  |
| R.9.51 | CSMS must at least represent data in bar and pie charts in-system | E |  |  |  |  |
| R.9.52 | CSMS should also support presenting data in scatter graphs, stacked graphs and treemaps |  | D |  |  |  |
| R.9.53 | CSMS must present data in tables in-system with the ability to sort by any column (ascending, descending and expand selection) and use filters | E |  |  |  |  |
| R.9.54 | CSMS should support adding additional custom columns to those above tables by the operators and able to use/make calculations as set by the central team operator |  | D |  |  |  |
| R.9.55 | CSMS should support the ability to highlight columns and rows |  | D |  |  |  |
| R.9.56 | CSMS should be able to display data in a list format with the central team operator able to sort it by certain fields and able to use filters |  | D |  |  |  |
| R.9.57 | CSMS must support exporting the raw data, reports and visualisations in the following formats: CSV, XLSX, XLS, PDF, JSON, DOCX and DOC | E |  |  |  |  |
| R.9.58 | CSMS should support exporting the raw data, reports and visualisations in PPT, PPTX and RTF as well |  | D |  |  |  |
| R.9.59 | Central team operator must be able to print and copy/paste data and reports directly from the CSMS | E |  |  |  |  |
| R.9.60 | Central team operators must be able to share their reports with other central team and college level operators (if they have the right permissions) | E |  |  |  |  |
| R.10 | **JobOnline/TCG-vacancies sharing** | | | | | |
| R.10.0 | Please see the following embedded PDF file for the JobOnline / TCG-vacancies sharing process. Please give a top level overview in the Comments section (the detail will be dealt within the subsequent questions) of how your solution will enable this process and highlight any unique features or benefits that your solution would bring to this process. | E |  |  |  |  |
| R.10.1 | Central team operators must be to view all vacancies on the system and whether they are: active, expired, rejected (and reasons for rejection), draft, withdrawn, deleted/archived or pending | E |  |  |  |  |
| R.10.2 | For the pending vacancies, Central team operators must be able to approve, edit & approve or reject (with specifying the rejection reasons and option to notify the employer) | E |  |  |  |  |
| R.10.3 | Central team operators must have the ability to search and filter jobs by: industry type, job type(s), location (UK-based locations: cities, counties and UK-wide option, and worldwide locations: countries & major cities), job tag(s), closing/expiry date, employer, salary, free text search and any other custom fields as set up by the operator | E |  |  |  |  |
| R.10.4 | Central team operators must have the ability to view which colleges the jobs were sent to and which were accepted and which were rejected (including the rejection reason) | E |  |  |  |  |
| R.10.5 | Central team operators must be able to easily view basic job stats on each vacancy, such as number of views including the total and per college breakdown | E |  |  |  |  |
| R.10.6 | Central team operators must be able to easily view basic job stats on each vacancy, such as the number of job saves/starring and the total saved and per college breakdown |  | D |  |  |  |
| R.10.7 | Central team operators must be able to view the details of each job such as: job title, employer (with a link to their employer profile), description, person requirements, expiry date, application details, salary, location (UK-based locations: cities, counties and UK-wide option, and worldwide locations: countries & major cities), job tag(s), job type(s), industry, number of vacancies, additional custom fields as specified by the operator and whether the job-level terms and conditions were accepted or not and if accepted by whom and when | E |  |  |  |  |
| R.10.8 | Central team operators must be able to view a list of all employers and whether they are active, have been deleted/archived, are draft, pending or blocked | E |  |  |  |  |
| R.10.9 | Central team operators should be able to see a list of hidden employers |  | D |  |  |  |
| R.10.10 | Central team operators must be able to have the ability to search and filter employers by industry type, job type(s), location, size, employer tags, a free text search, by custom criteria and by contact details (including email address, name and contact tags) | E |  |  |  |  |
| R.10.11 | Central team operators must be able to have the ability to search and filter employers by being active, the specific date range a contact has logged in (or if never), vacancy posting (across TCG) | E |  |  |  |  |
| R.10.12 | Central team operators should be able to have the ability to search and filter employers by being active, event posting (across TCG), event participating/hosting (across TCG) |  | D |  |  |  |
| R.10.13 | Central team operators must be able to view the employer's contact details, associated vacancies with this employer (including active, pending, expired), list of contacts associated with this employer, including whether they've accepted the Terms and Conditions or not (and if accepted by whom and when) | E |  |  |  |  |
| R.10.14 | Central team operators must be able to view the list of employer contacts, including their contact details, if they've used/logged in the system, activity log for each contact, have the ability to view contact detail changes and who made them, whether they've logged into the system and the date and time of their most recent visits | E |  |  |  |  |
| R.10.15 | Central team operators must be able to have the ability to merge employer profiles, of 2 or more existing profiles on the system and have the option of adding it as a subsidiary or a parent company to a existing profile and view notes and flags added by other operators | E |  |  |  |  |
| R.10.16 | Central team operators should have the ability to view communications and emails with a particular employer, whether this employer and/or contact has been authorised by the operators to auto approve vacancies, whether the employer and/or contact has been authorised by the operators to auto approve new contacts, whether this employer is part of an operator-set custom group and if so which group(s) and link to the group members |  | D |  |  |  |
| R.10.17 | Central team operators must have the ability to view employer details by assigned employer tag(s) and by operator set customer field(s) | E |  |  |  |  |
| R.10.18 | Central team operators must have the ability to view the list of contacts by their contact details, if they've used/logged into the system (if so the date and time of their most recent visits), the activity log for each contact, the ability to view contact detail changes and who made them (whether it was the operator or the contact themselves) and setting a particular contact to be the main contact | E |  |  |  |  |
| R.10.19 | Central team operators must have the ability to associate the job with the employer by creating a new employer, linking to an existing employer (with quick search facility), ability to post as a 3rd party employer (i.e. recruiter X recruiting on behalf of employer Y) | E |  |  |  |  |
| R.10.20 | Central team operators must have the ability to create a basic employer profile which includes basic employer text that's not associated with an employer profile on the system |  | D |  |  |  |
| R.10.21 | Central team operators must be able to view the details of each job such as: job title, description, person requirements (including by degree selection and free text), expiry date (including deadline with the option of integrating with expiry date as well as the option of a separate field and also a rolling date option), application details (including link to a 3rd party website, link to email address, free text option), salary (pre-set bands/options and free text), location (UK-based locations: cities, counties and UK-wide option, and worldwide locations: countries & major cities), job tag(s), job type(s) (pre-set list by the operators), industry (pre-set list by the operators), number of vacancies, job start date, it must allow rich text input/editing and any additional custom fields as specified by the operator | E |  |  |  |  |
| R.10.22 | Under location, the system should pick up on spelling mistakes and duplicate locations |  | D |  |  |  |
| R.10.23 | Central team operators must be able to post to all TCG college or select college(s) | E |  |  |  |  |
| R.10.24 | Central team operators must be able to add operator-only notes, including operator tasks, neither of which are viewable by employers | E |  |  |  |  |
| R.10.25 | Central team operators should be able to add operator-only notes, including operator reminders and the ability to tag other Central team operators in notes |  | D |  |  |  |
| R.10.26 | Central team operators must be able to set a job as 'featured', including making it stand out in the list of jobs, set 'featured' start/expiry dates with the option to override at any time | E |  |  |  |  |
| R.10.27 | Central team operators should be able to set a job as 'featured' and charge the employer for this feature, with the operator specifying the charge amount, whether it's VAT applicable (requiring the VAT registration number if applicable), the system will handle the payment if paid by card, having an option to generate a PO for non-card payments, the option for operator to mark payment as received and the option for operator to bypass payment |  | D |  |  |  |
| R.10.28 | Central team operators must be able to set restrictions as none, a combination of college(s) restriction groups, or as college-specific student/graduate restrictions (including by course/degree, school/faculty, departments), by type (including PGR, PGT, UG, Foundation, Post Docs, Graduates, Prospective) or by other (International/home/EU, WP, Disabled, Sandwich/gap year, gender) or by year of study, year of graduation, by student tag/label or by customer (operator defined) | E |  |  |  |  |
| R.10.29 | Operator should be able to set restrictions as career readiness |  | D |  |  |  |
| R.10.30 | Operator should be able to set restrictions as all apart from certain group(s) |  | D |  |  |  |
| R.10.31 | Central team operators must be able to add new employers and complete the following details: employer's name, main industry (one selection), additional industry(s) (multiple selection), contact details (physical address, telephone number(s), email(s) and URL(s)), employer's address (one primary and additional addresses that can be labelled, i.e. regional offices), employer's description, employer tag(s), company size, logo and any additional custom fields as defined by the operator | E |  |  |  |  |
| R.10.32 | Central team operators should be able to add the company registration number, flag if this is a recruitment agency, flag if this is a charity/NGO (if triggered, option to add the charity registration number should appear) and social media handles |  | D |  |  |  |
| R.10.33 | The CSMS must allow rich text input and editing for some of the above fields, i.e. description | E |  |  |  |  |
| R.10.34 | Central team operators (with appropriate permissions) must be able to add/edit/remove any of the fields above and set which are required and which are optional | E |  |  |  |  |
| R.10.35 | Central team operators must be able to create contacts and complete the following details: name, position, physical address (with the default being the employer's address), email(s), telephone number(s), can access the system (yes/no), opting in/out to receive mailing and notes (viewable only by central team operators) | E |  |  |  |  |
| R.10.36 | Central team operators must be able to post the new employer to: all TCG colleges or a selection of college(s) | E |  |  |  |  |
| R.10.37 | Central team operators should have the options to hide that employer profile from the colleges when there are no vacancies attached | E |  |  |  |  |
| R.10.38 | Central team operators must be able to set an internal band/category classification for each employer | E |  |  |  |  |
| R.10.39 | Central team operators should be able to assign an operator/group of operators to the employer |  | D |  |  |  |
| R.10.40 | Central team operators should be able to create custom employer groups on a local system level (with the ability to mass-set settings for this group and bulk emailing them) |  | D |  |  |  |
| R.10.41 | Central team operators should have the ability to make the employer profile hidden |  | D |  |  |  |
| R.10.42 | Central team operators must be able to block the employer/employer contact from using the JobOnline system either indefinitely or for a set period of time | E |  |  |  |  |
| R.10.43 | Central team operators must be able to duplicate existing jobs on the system as new | E |  |  |  |  |
| R.10.44 | Central team operators must be able to modify existing jobs on the system as follows: changing the closing date (close now/archive or to extend to a new date), change associated employer, change job restrictions, change status (active/live, delete/archive, send to draft, pending, withdrawn or reject (need to specify rejection reason with option to notify the employer)), change the colleges that receive this job, job details (title, description, person requirements, application details, salary, location(s), job type(s), industry, number of vacancies, job start date and any other custom fields that were created by the operator), and the terms & conditions acceptance flag | E |  |  |  |  |
| R.10.45 | Central team operators must be able to modify employer accounts as following: changing their status, details, colleges that can see this employer, contacts, merging profiles and deleting/archiving | E |  |  |  |  |
| R.10.46 | Central team operators should be able to set whether the employer/contact should approve vacancies and/or live jobs changes without having to be reviewed by the operator. Operator should do it by either assigning the employer to a custom group of employers with this ability or do it just for specific contact(s) within that organisation |  | D |  |  |  |
| R.10.47 | Central team operators must have the ability to delete any job, employer and contact with the option of archiving without deletion | E |  |  |  |  |
| R.10.48 | Central team operators must be able to add/edit/remove operator-only notes on jobs, employers and contacts. With the ability to attach emails from Outlook/email clients | E |  |  |  |  |
| R.10.49 | Central team operators should be able to tag other operators (central and college level) in the notes. Tagged operators should be notified of the tagging |  | D |  |  |  |
| R.10.50 | Central team operators should be able to add/edit/remove tasks |  | D |  |  |  |
| R.10.51 | Central team operators should be able to set a completion date for each task and assign/unassign it to operators/group of operators including themselves |  | D |  |  |  |
| R.10.52 | Assigned operators should be able to mark their task as complete |  | D |  |  |  |
| R.10.53 | CSMS should send reminders to the assignee near the deadline |  | D |  |  |  |
| R.10.54 | Central team operators must be able to upload and attach files/documents to employer and contact accounts, with the ability to delete them | E |  |  |  |  |
| R.10.55 | Central team operators must be able to set which user group(s) can view these files/documents | E |  |  |  |  |
| R.10.56 | CSMS should accept the following formats as minimum: PDF, DOC, DOCX, JPEG, PNG, PPT, PPTX, XLS, XLSX and RTF | E |  |  |  |  |
| R.10.57 | Central team operators must be able to view a list of all employers, contacts and jobs in the pending queue | E |  |  |  |  |
| R.10.58 | Central team operators must be able to search and filter the pending requests by various criteria | E |  |  |  |  |
| R.10.59 | Central team operators must be able to: approve, amend then approve or reject (with the ability to specify the rejection reason and notify the employer of the rejection) the pending requests | E |  |  |  |  |
| R.10.60 | Central team operators should be able to lock/assign/unlock pending requests, e.g. mark a pending request as locked while the operator does further checks/investigations so other operators leave it be |  | D |  |  |  |
| R.10.61 | Central team operators must be able to add operator-only notes (and potentially tagging with operators) to the pending requests | E |  |  |  |  |
| R.10.62 | Central team operators should be able to select from a list of different templates/pre-set emails to send to the employers via the system, e.g. to query details about their request/application like minimum wage or missing/wrong details |  | D |  |  |  |
| R.10.63 | Central team operators must be able to view change requests to live jobs by employers/contacts and be able to: approve, amend then approve or reject (with the ability to specify the rejection reasons and notifying the employer - job goes back to the original approved version) | E |  |  |  |  |
| R.10.64 | Central team operators must be able to view "featured" job requests and be able to do one of the following: approve, amend then approve or reject (with the ability to specify the rejection reasons and notifying the employer - job goes back to the original approved version) | E |  |  |  |  |
| R.10.65 | In case of the approval of the above, it should go to the payment handling and ensuring that the employer has paid (or had their payment waived by the operator) before the post is advertised as "featured" |  | D |  |  |  |
| R.10.66 | Central team operators must be able to see questions/queries raised by the employers & contacts, and respond to them (notifies the employer in this case) | E |  |  |  |  |
| R.10.67 | Central team operators must have the ability to mark outstanding queries as done or close incoming queries without responding | E |  |  |  |  |
| R.10.68 | Central team operators should be able to set, edit and remove the types/categories of the questions/queries and set which operator(s)/operator group(s) do these questions go to |  | D |  |  |  |
| R.10.69 | Central team operators should be able to reassign the question/query to another operator(s)/operator group(s) |  | D |  |  |  |
| R.10.70 | Operators must be able to report on all vacancies on the system including (but not limiting to): number of hits (total & unique), application link clicks (total & unique), job statuses, source of the vacancy (added by the central team operator, employer or via the CSMS network), location(s), job type(s), posting date and closing date | E |  |  |  |  |
| R.10.71 | Operators must be able to report on all employers and contacts engagement with CSMS to add vacancies by: employer type, contact type, industry, employer & contact tag(s), location, company size, activity or contacted the operators via the in-system CSMS | E |  |  |  |  |
| R.10.72 | Operators must be able to report on all employers and contacts engagement with CSMS by: employer type, contact type, industry, employer & contact tag(s), location, company size, activity (logged into the system, posted vacancies, contacted the operators via the in-system CSMS) | E |  |  |  |  |
| R.10.73 | Ability to report on the source of employer and contact profiles, whether they were added by operators or posted by the employer/contact, and who added them and when | E |  |  |  |  |
| R.10.74 | Ability to report on the rejected jobs and the reasons for rejection | E |  |  |  |  |
| R.10.75 | Ability to report on custom fields and custom criteria | E |  |  |  |  |
| R.10.76 | Employers must be able to create their own contact account using their email and set up a CSMS password | E |  |  |  |  |
| R.10.77 | CSMS must check for the email address being in use already or have been set up an operator previously, and if found, it prompts the user to log in with their password or reset it | E |  |  |  |  |
| R.10.78 | CSMS to auto-approve contact account, if their email address's domain matches the organisation's domain name. Must be switch on for select employers by the operator (default is off) | E |  |  |  |  |
| R.10.79 | Employers must be able to complete their own contact details and accept the CSMS & TCG's terms and conditions before they can use the CSMS | E |  |  |  |  |
| R.10.80 | Employers must be able to create their organisation profile and complete the following details: employer's name, main industry (one selection), additional industry(s) (multiple selection), contact details (physical address, telephone number(s), email(s) and URL(s)), employer's address (one primary and additional addresses that can be labelled, i.e. regional offices), employer's description, employer tag(s), company size, logo and any additional custom fields as defined by the operator | E |  |  |  |  |
| R.10.81 | User should be able to add the company registration number, flag if this is a recruitment agency, flag if this is a charity/NGO (if triggered, option to add the charity registration number should appear) and social media handles |  | D |  |  |  |
| R.10.82 | Employers should be prompted whether they're a 3rd party recruiting on behalf of a client. If yes, they should be warned about a potential charge |  | D |  |  |  |
| R.10.83 | Employers must be able to add new job adverts to the CSMS themselves | E |  |  |  |  |
| R.10.84 | Employers must be able to associate a contact(s) with the job that could be themselves, a selection from the existing contacts associated with the same employer or a brand new contact | E |  |  |  |  |
| R.10.85 | Employers must be able to input the following details: job title, description, person requirements (by degree selection and free text), expiry date inc. deadline (option of integrating with expiry date as one field or 2 separate fields), salary (pre-set bands/options, free text, ability to select different currencies, i.e. £, $, € ... etc), job type(s), industry, number of vacancies, job start date and any additional custom created fields by the operators | E |  |  |  |  |
| R.10.86 | Employers must be able to define the application process for each job, which must be one of the following: applying via the CSMS (CSMS-managed recruitment - requires operator's authorisation), link to the employer's/3rd party's recruitment website, link to an email address and/or a free text option for the application details | E |  |  |  |  |
| R.10.87 | Employers must be able to define the location by one of the following: UK-based locations: cities, counties and UK-wide option, and worldwide locations: countries & major cities, with ability to add multiple location for multi-location jobs | E |  |  |  |  |
| R.10.88 | The CSMS must check and stop duplication/misspelling of location names | E |  |  |  |  |
| R.10.89 | The CSMS must allow rich text input and editing for some of the above fields, i.e. description, person requirements, application details … etc | E |  |  |  |  |
| R.10.90 | The CSMS should allow the ability to show the salary's equivalent in Pounds for non-Pounds salaries based on the current exchange rates |  | D |  |  |  |
| R.10.91 | Employers must accept the job advertising terms and conditions as set by the central team operator | E |  |  |  |  |
| R.10.92 | CSMS not to advertise the job if that's not ticked/accepted | E |  |  |  |  |
| R.10.93 | Central team operators must be able to control the terms and conditions text with ability to link to 3rd party websites for further details | E |  |  |  |  |
| R.10.94 | Employers should be able to select which contact(s) from those associated with the same employer can view the same job |  | D |  |  |  |
| R.10.95 | Employers must be able to duplicate an existing job as new (from an active or an expired job) | E |  |  |  |  |
| R.10.96 | Employers must be able to request to set their job as "featured" | E |  |  |  |  |
| R.10.97 | CSMS must warn that this will require the approval by the operator and there could be a potential charge for this | E |  |  |  |  |
| R.10.98 | Employers must be able to select their desired start and end dates of their job being featured | E |  |  |  |  |
| R.10.99 | Employer users must be able to modify their contact account details inc. changing their password | E |  |  |  |  |
| R.10.100 | Employer users must be able to modify their organisation's profile | E |  |  |  |  |
| R.10.101 | Employer users must be able to see other contacts associated with their organisation and add new contact(s) | E |  |  |  |  |
| R.10.102 | Employer users must be able to request changes to other contact(s) details and/or remove contact(s) that are associated with their organisation. These need to be approved by an operator | E |  |  |  |  |
| R.10.103 | Employers must be able to modify jobs that they have previously posted themselves or posted by the operator (and viewable by the employer contact(s)) | E |  |  |  |  |
| R.10.104 | Employers must be able to amend the closing date by either closing the job now or extending it further | E |  |  |  |  |
| R.10.105 | Employers must be able to amend the following details about the job: Location, title, description, requirements, application details, job type(s), number of vacancies, expected interview date(s), job start date and any other custom fields as set by the operator | E |  |  |  |  |
| R.10.106 | Employers must be able to change the associated contact(s) with the advertise job | E |  |  |  |  |
| R.10.107 | Employer users must be able to view their organisation details and track their own engagement with the CSMS | E |  |  |  |  |
| R.10.108 | Employer users must be able to see all the active vacancies, placements and events associated with their organisation and their basic view hits/stats | E |  |  |  |  |
| R.10.109 | Employers be able to view all the jobs associated with their account (that the contacts are eligible to see). Including: active/live jobs (with their full details, closing date, views/hits stats & application clicks), expired jobs (with their full details, closing date, views/hits stats and the ability to re-advertise again or create a duplicate job based on it) and rejected jobs by the operators and their reason(s) for rejection | E |  |  |  |  |
| R.10.110 | Employer users must be able to message the operators easily and securely via the CSMS | E |  |  |  |  |
| R.10.111 | These messages/enquiries must go to the central team operator(s)/operator group(s) that is associated with the raised question type/category | E |  |  |  |  |
| R.10.112 | Employers must be notified when operators respond and see their response with the ability to send further messages relating to the initial query | E |  |  |  |  |
| R.10.113 | Employers must be able to see a history of their questions and operator responses | E |  |  |  |  |
| R.10.114 | Employers must be able to close/withdraw their message/enquiry | E |  |  |  |  |
| R.10.115 | College level operator must be able to view a list of incoming jobs from the central JobOnline team and do one of the following: approve & publish to the local college, edit then approve & publish to the local college or reject | E |  |  |  |  |
| R.10.116 | College level operator must be able to add the college-specific view restrictions to each job. The restrictions can be set to none, particular group of students/graduates by: course/degree, school/faculty, department, type (postgraduate taught, postgraduate research, undergraduate, foundation, post doctorate, perspective, graduate), year of study, year of graduation, student tags/labels, career readiness statement, other attributes (widening participation background, disability, gender & on a sandwich/gap year) and any other custom fields as set by the operator, or a combination of the above attributes (with an and/or option) | E |  |  |  |  |
| R.10.117 | For the rejected jobs, college level operators must specify (or select from a pre-set dropdown list) the reason for rejection | E |  |  |  |  |
| R.10.118 | CSMS must log and make it viewable to the central team operator that the college rejected a job and the reason for the rejection | E |  |  |  |  |
| R.10.119 | College level operator must be able to search and filter incoming jobs from the central JobOnline with the ability to bulk approve/reject the filtered jobs | E |  |  |  |  |
| R.10.120 | College level operator must be able to see the basic stats on each job, including the number of hits from their local college, number of application clicks and number of "starring"/"favouriting" of the job | E |  |  |  |  |
| R.10.121 | College level operator must have in-CSMS means of communication back and forth with the central JobOnline about a specific job that they've received | E |  |  |  |  |
| R.10.122 | College level operator must be able to view a list of incoming employer profiles from the central JobOnline team and do one of the following: approve & publish to the local college, edit then approve & publish to the local college or reject | E |  |  |  |  |
| R.10.123 | College level operator must be able to add the college-specific view restrictions to each employer. The restrictions can be set to none, particular group of students/graduates by: course/degree, school/faculty, department, type (postgraduate taught, postgraduate research, undergraduate, foundation, post doctorate, perspective, graduate), year of study, year of graduation, student tags/labels, career readiness statement, other attributes (widening participation background, disability, gender & on a sandwich/gap year) and any other custom fields as set by the operator, or a combination of the above attributes (with an and/or option) | E |  |  |  |  |
| R.10.124 | For the rejected employer accounts, college level operators must specify (or select from a pre-set dropdown list) the reason for rejection | E |  |  |  |  |
| R.10.125 | CSMS must log and make it viewable to the central team operator that the college rejected an employer profile and the reason for the rejection | E |  |  |  |  |
| R.10.126 | College level operator must be able to search and filter incoming employer profiles from the central JobOnline with the ability to bulk approve/reject the filtered accounts | E |  |  |  |  |
| R.10.127 | CSMS to check and indicate to the college level operator whether this employer is already on the local college's CSMS or not. In case of a match, CSMS must give the option to merge profiles, ignore the new profile but attach any incoming vacancies or extra info to the old profile, remove the old profile and put the new one on the local CSMS instead, or add a subsidiary/parent company | E |  |  |  |  |
| R.10.128 | College level operator must be able to see the basic stats on each employer profile including the number of hits from their local college, collective number of hit on the associated jobs to this employer, collective number of application clicks for the associated jobs to this employer and number of "starring"/"favouriting" of the employer's profile | E |  |  |  |  |
| R.10.129 | College level operator must have in-CSMS means of communication back and forth with the central JobOnline about a specific employer profile that they've received | E |  |  |  |  |
| R.10.130 | College level operator should have the option to set an "auto approve" for all/some jobs and employer from the central JobOnline team in case they don't have the resources to check and approve the incoming jobs & employers |  | D |  |  |  |
| R.10.131 | CSMS should pick up any duplicates, e.g. the incoming job matches a pre-existing job on the local system, and must notify the operator rather than "auto approve it" |  | D |  |  |  |
| R.11 | **Other** | | | | | |
| R.11.0 | Please see the following embedded PDF file for the Other process. Please give a top level overview in the Comments section (the detail will be dealt within the subsequent questions) of how your solution will enable this process and highlight any unique features or benefits that your solution would bring to this process. | E |  |  |  |  |
| R.11.1 | CSMS must be responsive and works with mobile devices with different screen sizes and dimensions | E |  |  |  |  |
| R.11.2 | CSMS must be responsive and works on different monitors with different resolutions | E |  |  |  |  |
| R.11.3 | All aspects of the dashboard and CSMS functionality to work when the display is scaled down to fit a mobile device | E |  |  |  |  |
| R.11.4 | CSMS should have a native mobile device application that's available to download via the Apple App Store or Google Play Store |  | D |  |  |  |
| R.11.5 | CSMS must support and work with assistive technology | E |  |  |  |  |
| R.11.6 | CSMS should work with JAWS (screen reader) and Apple's VoiceOver |  | D |  |  |  |
| R.11.7 | Operators (super admins) must be able to create, read, update and delete operators and their CSMS permissions | E |  |  |  |  |
| R.11.8 | CSMS must support and allow granular user rights across the who system that can be customised by the super admin | E |  |  |  |  |
| R.11.9 | CSMS must allow the ability to have different permissions settings for the different data within the same section | E |  |  |  |  |
| R.11.10 | Super admins can only access the permissions settings and the global CSMS settings | E |  |  |  |  |
| R.11.11 | Super admins must be able to create, read, update and delete permissions groups and assign them to the operators | E |  |  |  |  |
| R.11.12 | CSMS must allow students/graduates to be blocked from accessing the system or doing certain activities based on a pre-set criteria, i.e. missing certain number of appointments, events or a combination of both | E |  |  |  |  |
| R.11.13 | CSMS must allow the operators to set the restrictions/limitations that these blocked students can no longer do while they're blocked, i.e. book appointments, book events, see vacancies or use the system entirely | E |  |  |  |  |
| R.11.14 | CSMS must allow the student/graduate block to either be time-specific that's set by the operator or be indefinite | E |  |  |  |  |
| R.11.15 | Operators must have the ability to manually block/unblock students at any time | E |  |  |  |  |
| R.11.16 | CSMS must allow employer contacts to be blocked from accessing the system or doing certain activities based on a pre-set criteria, i.e. missing events or posting jobs that constantly rejected by the operators | E |  |  |  |  |
| R.11.17 | CSMS must allow the operators to set the restrictions/limitations that these blocked employer contact can no longer do while they're blocked, i.e. book events, see/post vacancies or use the system entirely | E |  |  |  |  |
| R.11.18 | CSMS must allow the employer contact block to either be time-specific that's set by the operator or be indefinite | E |  |  |  |  |
| R.11.19 | Operators must have the ability to manually block/unblock employer contacts at any time | E |  |  |  |  |
| R.11.20 | CSMS must allow a 2 way synchronisation between the system and individual user groups calendars | E |  |  |  |  |
| R.11.21 | CSMS must allow locations management, including creating, reading, updating and deleting locations. Details about locations to include, name, building, campus, description and default capacity | E |  |  |  |  |
| R.11.22 | CSMS must allow to set up a locations within each other, i.e. rooms within a building | E |  |  |  |  |
| R.11.23 | Each location to have its own calendar that is accessible by the operator | E |  |  |  |  |
| R.11.24 | CSMS to check for booking conflicts when arranging events and appointments at each location | E |  |  |  |  |
| R.11.25 | CSMS must have a separate test/staging/User Acceptance Testing site that the operators can test functionality on and train staff | E |  |  |  |  |
| R.11.26 | Test site must its data refreshed from the live site periodically, i.e. every 3 months | E |  |  |  |  |
| R.11.27 | Test site must have the same operators and group permissions as the live site | E |  |  |  |  |
| R.11.28 | Test site must have the same look and feel as the live site | E |  |  |  |  |
| R.11.29 | New features/functionality must be released on the test site first for staff to test and train on before they are being released to the live site | E |  |  |  |  |
| R.11.30 | CSMS must support the ability to create, read, update and delete custom RSS feeds for vacancies and events | E |  |  |  |  |
| R.11.31 | Operators must be able to customise what goes on each feed based on certain criteria, i.e. mechanical engineering jobs only | E |  |  |  |  |
| R.11.32 | CSMS must support the following RSS feed formats: RSS 0.90, RSS 0.91, RSS 0.92, RSS 0.93, RSS 0.94, RSS 1.0, RSS 2.0, ATOM 0.3 and ATOM 1.0 | E |  |  |  |  |
| R.11.33 | Operators must be able to switch feeds on and off | E |  |  |  |  |
| R.11.34 | Operators must be able to control the CSMS's header and footer content | E |  |  |  |  |
| R.11.35 | Operators must be able to add a disclaimer text and/or link in the footer | E |  |  |  |  |
| R.11.36 | Operators must have the ability to customise the disclaimer text and/or link in the footer for different user groups, i.e. employers, students, graduates | E |  |  |  |  |
| R.11.37 | Each user group to have their own customisable dashboard that feeds from the CSMS functionality that they can access | E |  |  |  |  |
| R.11.38 | Operator must be able to set & customise the default dashboard layout for each group | E |  |  |  |  |
| R.11.39 | Operators should be able to further customise the dashboard per additional user group criteria, i.e. 1st year psychology students … etc |  | D |  |  |  |
| R.11.40 | Users must be able to customise their own dashboard with the ability to hide/collapse/remove certain dashboard items and change the layout | E |  |  |  |  |
| R.11.41 | Customised dashboards must be saved and appear by default to the user next time they log in to the CSMS | E |  |  |  |  |
| R.11.42 | CSMS must have a careers resources management and display provision | E |  |  |  |  |
| R.11.43 | Operators must be able to add and display different careers resources on the system of the following types: articles, embedded videos (hosted outside the CSMS but can be embedded in - in CSMS hosting is a bonus), 3rd party links/websites, images and documents (PDF, DOC, DOCX, XLS, XLSX, PPT, PPTX and RTF) | E |  |  |  |  |
| R.11.44 | The resources section should be able to integrate with the VLE |  | D |  |  |  |
| R.11.45 | Operators must be able to create, read, update and delete resource each resource content item | E |  |  |  |  |
| R.11.46 | CSMS to log the edit history and by which operator | E |  |  |  |  |
| R.11.47 | Operators must be able to control the restrictions and access permissions for each item, i.e. which user group (with granular breakdown) can access as per the vacancies restrictions control | E |  |  |  |  |
| R.11.48 | Operators should be able to tag each resource using one or more tags. Tags could be pre-existing/pre-used or new that are added on the spot |  | D |  |  |  |
| R.11.49 | CSMS should display a list of available clickable tags to all the user groups (as long as they fall within their permissions/restrictions criteria) |  | D |  |  |  |
| R.11.50 | Users should be able to click on any of the available tags and see all the content under that tag (as long as they fall within their permissions/restrictions criteria) |  | D |  |  |  |
| R.11.51 | Each tag should have an unique link that can be retrieved and shared outside the CSMS. When users click on that link, providing that they've been authenticated successfully by the CSMS, should immediately see a list of all the content under that tag |  | D |  |  |  |
| R.11.52 | Operators must be able to report on the number of views, clicks and viewers demographics | E |  |  |  |  |
| R.11.53 | CSMS to have a real time synchronisation with the college's students & recent graduates registry/database | E |  |  |  |  |
| R.11.54 | CSMS to detect when a student is no longer an active student and either convert to a graduate account if they’ve completed their course without losting any of their data or close their account if they have withdrawn from the university | E |  |  |  |  |
| R.11.55 | Operators must be able to access and view student and graduate profiles (depending on permissions with ability to restrict certain data on their account to operators with certain permissions) | E |  |  |  |  |
| R.11.56 | Operators must be able to search and filter student profiles by, but not limiting to: course/degree, school/faculty, department, type (Undergraduate, postgraduate research, postgraduate taught, foundation, post doctorate, graduate or prospective), year of study, year of graduation, career readiness, student tag(s)/label(s), other attributes (widening participating, disability, on a sandwich/gap year and gender), their activity on & interaction with the CSMS (logged in, attended certain events, attended certain appointment(s)/appointment type(s), completed certain job(s)/placement(s)/award(s) or completed their profile/certain fields on their profile) and any other custom fields as defined by the operator | E |  |  |  |  |
| R.11.57 | Operators must be able to bulk add & remove student tags to the filtered profiles above | E |  |  |  |  |
| R.11.58 | Operators (with certain permissions) should be able to override the information on a student or a graduate profile |  | D |  |  |  |
| R.11.59 | Operators (with certain permissions) should be able to create, read, update and remove local student and graduate accounts (separate from those on the students data feed) |  | D |  |  |  |
| R.11.60 | Graduates must be able to access the system after they finish their studies, either by logging in directly or registering for a graduate access | E |  |  |  |  |
| R.11.61 | Operators must be able to set a time limit for graduate access that could be: by an operator set number of days, months or years after their graduation date, or no time limit on their access | E |  |  |  |  |
| R.11.62 | Operators (with certain permissions) must be able to manually add and remove graduate accounts | E |  |  |  |  |
| R.11.63 | Operators (with certain permissions) must be able to access and view the history of each student/graduate's activities and interactions with the system including all the CSMS-generation/managed communication and notifications that went out to them | E |  |  |  |  |
| R.12 | **Non-functional requirements** | | | | | |
| R.12.1 | Solution implemented at TCG and its member colleges must be accessible to ALL users with a diverse range of hearing, movement, sight, and cognitive ability enabling people with disabilities to participate equally on the web. The solution should support assistive technology such as screen readers and voice recognition tools and must adhere to Accessibility Standard (web Content Accessibility guidelines (WCAG) 2.0. The solution must also adhere to the University of London and its member colleges' information accessibility policies such as <http://www.kcl.ac.uk/governancezone/Assets/InformationPolicies/Accessible%20Information%20Policy.pdf> | E |  |  |  |  |
| R.12.2 | Multiple Branding: The solution should be capable of being locally branded to reflect institutional branding guidelines. Each member institute must be able to brand their CSMS in their own branding.  Each member institute to be have full control to add logos to placement/internship adverts | E |  |  |  |  |
| R.12.3 | Solution Must be available 24/7 to all users (99.95 % Uptime) which will be measured by member colleges' Monitoring Software and Vendors Monitoring Software.  Core Business Hours are between 9am and 5pm It is estimated that the solution usage will be over 100% above the baseline during peak periods such as the first half of October | E |  |  |  |  |
| R.12.4 | Solution provider must monitor available service using an appropriate tools. Some of the member colleges are currently using service monitor software, such as Nagios, to monitor publicly available services and want to continue to be able to do so. | E |  |  |  |  |
| R.12.5 | Sufficient backups should exist to support the recoverability requirements. These should be monitored and tested on a regular basis to ensure that recovery is achievable within the RTO.  Our standard backup provision is: Application Tier Monday-Friday 23:30, Daily Differential – retention 2 weeks Saturday, Weekly Full – retention 1 month First Saturday of month, Monthly Full – retention 6 months  Database Tier Backups saved to file-share File-share backup: Monday-Friday 23:30, Daily Differential – retention 2 weeks Saturday, Weekly Full – retention 6 months | E |  |  |  |  |
| R.12.6 | If the system is acquired as SAAS the solution vendor must provide disaster recovery processes. Solution must be able to restore data from last back up point. Recovery Time Objective : 24 hours Recovery Point Objective: 24 hours | E |  |  |  |  |
| R.12.7 | Vendor and TCG/member college's IT must demonstrate capability for the solution users to continue delivery of the services at acceptable predefined level following a disruptive incident as agreed in the Service Level Agreement and Contract. Should at least meet the ISO22301 Business Continuity Standard | E |  |  |  |  |
| R.12.8 | At least 50 Mb of document storage per student, for at least 50k students (per solution/college instance). | E |  |  |  |  |
| R.12.9 | Vendor solution to demonstrate structured process used to ensure that changes to a product from Test/Dev environment to Live environment are in a controlled and coordinated manner. Any transition into Live environment MUST be approved and signed of by TCG and its member colleges Project Review Boards. New features/functionality are to be released on the test site first for business acceptance before being released to live | E |  |  |  |  |
| R.12.10 | The solution must adhere to IT Network usage policies at UoL and its member colleges such as <http://www.kcl.ac.uk/governancezone/InformationPolicies/IT-Network-Policy.aspx> | E |  |  |  |  |
| R.12.11 | Solution vendor must provide reliable, efficient and proactive helpdesk/second level support to TCG and its member colleges including email and UK Telephone customer support for resolution of queries during normal UK Business Hours. Vendor must demonstrate the ability to document escalation process including management policy. Calls should be assigned priorities with relevant response times – minimum response time for priority call one hour; maximum repose time one working day.  There must be mechanism in place for vendor to communicate with TCG IT and its member college's IT Service Desk teams Please give details of prioritisation for multiple user demands across institutions at peak times. | E |  |  |  |  |
| R.12.12 | From your experience of installing your product, provide TCG and its member colleges with an approach to migrating our data when required. There should be a description of the data migration activities in your project plan, including exit strategy All structured and unstructured data must be available and provided to TCG and/or its member colleges upon request in an industry standard format (e.g., .doc, . pdf, logs, and flat files).  TCG and/or its member college will be the sole owner of the (Solution Name) data and data must be available upon request within 48 Business Hours | E |  |  |  |  |
| R.12.13 | Data migration: please confirm your recommended approach for cut-over from a pre-existing solution i.e. dual-running or data migration. | E |  |  |  |  |
| R.12.14 | The solution must adhere to UoL's Data Protection Policy <https://london.ac.uk/sites/default/files/governance/data-protection-policy.pdf> and the member colleges' Data Protection Policies where it will be deployed, such as <https://www.kcl.ac.uk/governancezone/GovernanceLegal/Data-Protection-Policy.aspx>.  AND in compliance with the EU General Data Protection Regulation (GDPR) A Data Protection Impact Assessment must be completed for all data used and processed by the solution | E |  |  |  |  |
| R.12.15 | The solution must provide, as a minimum, business reporting outputs via Excel or CSV using selectable parameters; users should be able to save reports for future use within the solution. | E |  |  |  |  |
| R.12.16 | The solution will ideally also facilitate secure SQL querying/data connections, and possibly full third party MI/BI integration (e.g. PowerBI, Tableau etc.). | E |  |  |  |  |
| R.12.17 | Data stored in Solution is required to be retained for four years following graduation.  Archive records must be available upon request by TCG and/or its member colleges within 48 Business Hours | E |  |  |  |  |
| R.12.18 | Backup data must be encrypted to preserve the confidentiality and integrity of data. The solution vendor must use strong encryption algorithm AES-256 bit to store the backup data. The SP must also provide TCG detailed key management process. | E |  |  |  |  |
| R.12.19 | Solution Development Roadmap: please provide the details of your solution development roadmap for the next 24 months. Please include details as to how customers might influence this roadmap and what feedback opportunities forums exist for customers | E |  |  |  |  |
| R.12.20 | The solution must display live (or very close to live) booking, event, placement, appointment or vacancy availability without the need for the user to refresh the screen | E |  |  |  |  |
| R.12.21 | It should take no longer than five minutes to for users to achieve goals of simple tasks,e.g. appointment set up, event creation, job review and approval. | E |  |  |  |  |
| R.12.22 | Production and non-production (test, staging) environments shall be separated to prevent unauthorised access or changes to information assets. A separate (test/staging/UAT) environment will be available to allow operators to test functionality and train staff, and to trial new features before release to the production environment | E |  |  |  |  |
| R.12.23 | In-system data transactions must have documentation and formatted error messages, e.g. so users know exactly what they did wrong in order not to repeat their mistake and/or clear that the error is not a result of their action | E |  |  |  |  |
| R.12.24 | Describe the properties that enables vendor solution to continue operating properly in the event of the failure of some of its components. | E |  |  |  |  |
| R.12.25 | We would require unlimited staff users, and the capacity to add new APIs to the system from other internal systems and stakeholders as required. | E |  |  |  |  |
| R.12.26 | Ability for employers to add vacancies with one click - as opposed to navigating through various menus | E |  |  |  |  |
| R.12.27 | Mark as 'safe' or 'Uncontactable' functionality for service users on placements/internships | E |  |  |  |  |
| R.12.28 | Solution location: Solution must be supplier-hosted within UK/EU data centre. Please provide details of this.  If the solution is solely supplier hosted i.e. a Cloud type solution, please provide full details on the hosting environment, specifically addressing data security and any accreditation that may apply e.g. ISO27001 etc. | E |  |  |  |  |
| R.12.29 | User categories: the solution must provide configurable categories of users, to which specified privileges can be added by system administrators who can assign users to specific categories. Administrators must be able to tailor access levels for individual users where required, to grant CRUD permissions for all types of data held in the solution. Access permissions: the solution should support data security in terms of access restrictions placed on user roles including giving access to reports.  External employers must be able to be granted differing levels access to data and documents as required Guest access provided to specific academics to oversee and approve documentation for credit bearing placements/internships/awards | E |  |  |  |  |
| R.12.30 | Integration: The solution must be able to integrate using a Batch Process for two-way data processing - Integration must be accompanied with documentation and examples. The two-way data processing must be able to provide or receive data deltas, have the ability to filter the data by what data has changed or by providing the change and creation timestamp columns to allow for delta processing. • Must use one of the following Protocols; HTTPS, FTPS or SSL • Must use one of the following frameworks; SOAP, REST, File or Database (SQL Server, Oracle, etc.) • Must output the data in one of the following formats; XML, JSON, CSV or SQL | E |  |  |  |  |
| R.12.31 | API: The solution should be able to integrate using a Pull/Push Process for two-way data processing – API based Integration and must be accompanied with documentation and examples.  The two-way data processing must be able to provide or receive data deltas or have the ability to filter the data by what data has changed to allow for delta processing. • Must use one of the following Protocols; HTTPS • Must use one of the following frameworks; SOAP or REST • Must output the data in one of the following formats; XML, JSON or CSV • Office 365 and G Suite For Education integration: solution will provide two way updates with Office 365 and G Suite for Education calendars • Just the necessary finance system integration (Unit 4 Business World) for the raising of charges for Employer Organisations, payment and reconciliation - plus a payment portal to facilitate payment by Credit Card • Student Database (SITS, Banner) integration for the population of student data • Virtual Learning Environment (VLE) (Moodle, Canvas and Blackboard) integration so student journey can be enhanced through online learning and reflection methodologies.  • Potential integration with in-house CRMs, e.g. MS Dynamics, in the future | E |  |  |  |  |
| R.12.32 | Single Sign On (SSO): the solution must support the most common SSO protocols e.g. Shibboleth/SAML/CAS and LDAP and the option to use local accounts instead; please outline the SSO protocols supported | E |  |  |  |  |
| R.12.33 | Access logging: the solution must be able to trace or log use of the system (e.g. who created or updated an event on the system). This information must be accessible to relevant users | E |  |  |  |  |
| R.12.34 | System updates (minor):  Please give details on how minor systems updates are managed securely (security patching, bug fixes etc.).  Please include responsibilities for the application of minor updates (Supplier / Customer) | E |  |  |  |  |
| R.12.35 | System updated (major): please give details of how major system updates are managed securely (new versions, significant updates and new standard functionality). Include responsibilities for the application of these updates (supplier/customer). | E |  |  |  |  |
| R.12.36 | Implementation timescales: please give a short, example scope of works for the project to install, configure, and test the solution. | E |  |  |  |  |
| R.12.37 | Vendor Solution must adhere to criteria's below;  1. Agreed line of support (support owner) from TCG/member college/which department are responsible for contacting them in the event of incidents. 2. Agreed SLA’s on responses to first contact from TCG/member college to vendor/provider/line of support, SLA’s for resolution, and regularity of updates. For both usual working hours and out of hours. 3. Named contacts and contact details for contacts for vendor support. 4. Agreed troubleshooting tasks for first point of contact on IT Support Desk | E |  |  |  |  |
| R.12.38 | API Data Processing (per solution/college instance) • Data transactions must handle up to [25 GB] of data • Data transactions must handle up to [100,000] records hourly processing or [1,000,000] daily processing • Data transactions processing time must handle a minimum of [10,000] records per minute • A record must handle up to [100] fields (Columns) • Data transactions must have documentation and formatted error messages if no data can be retrieved | E |  |  |  |  |
| R.12.39 | Staff and service users to be able to push events hosted on the solution to social media platforms Able to share vacancies via a feed to advertising platforms such as the member college's website, VLE platforms (Moodle, Canvas and Blackboard) and via RSS Feed | E |  |  |  |  |
| R.12.40 | System intuitive enough so that new users can learn core functionality with minimal teaching using provided documentation and training resources | E |  |  |  |  |
| R.12.41 | Solution to responsively support devices running Chrome, Internet Explorer, Edge, Firefox, Safari and Opera browsers.  MS Windows, MacOS, Linux, iOS and Android Operating Systems  Mobile access: The solution must support mobile access and be smart-phone/tablet optimised (responsive design) in terms of user experience. Including user dashboard, booking functionality and messaging. Ideally a bespoke mobile application available for core processes such as booking appointments | E |  |  |  |  |
| R.12.42 | Please provide details of what modes of customer service support you offer – i.e. FAQ online, email support, phone support etc. - Please confirm the physical location of Service Desk and support staff. Please advise if data leaves EMEA for support escalation - Please detail how call logging process works e.g. via phone, email, web portal etc. - Please detail support call prioritisation and escalation processes | E |  |  |  |  |
| R.12.43 | Technical skillset requirement: please provide details of any specific technical skillsets required during the implementation phase e.g. Web developer, DBA etc. | E |  |  |  |  |
| R.12.44 | Project management methodology: please detail your project management methodology and confirm what accreditations your company holds | E |  |  |  |  |
| R.12.45 | Quality Assurance: Please provide details of your measures for ensuring quality, details of your quality registrations (if any) for example ISO9001 or equivalent. | E |  |  |  |  |
| R.12.46 | References: please provide 2 site references for customers where you have implemented the same or similar solution. Ideally these should be within the HE sector. | E |  |  |  |  |
| R.12.47 | Live search responses: the search tool should provide results within 2 seconds of starting the search.  New content: creating or deleting an appointment/event/vacancy or similar listing should take no longer than 5 seconds from saving the command.  Form submission: submission of forms should take no longer than 2 seconds from the user submitting the form.  Simultaneous commands: ability to handle a minimum of 100,000 user commands at any one time without detrimental effect on overall system performance. (per solution/college instance) Instantaneous changes: the solution should be able to handle instantaneous page changes and be able to send emails instantly.  File uploads: ability to upload files to the system in no more than 2 seconds for files of 500KB or less, and no more than 10 seconds for files larger than 500 KB. A live connection between the event attendance monitoring mechanism and the solution | E |  |  |  |  |
| R.12.48 | Solution provider must demonstrate the solution should be scalable to extend further as part of The Careers Group and its member colleges expansion strategy. It includes scalability of the software (SaaS), Platform (PaaS) and Infrastructure (IaaS) There should be the opportunity to create separate instances for each member college and possibly departments within the member colleges. | E |  |  |  |  |
| R.12.49 | SLA contracts: Please confirm you accept our SLA (Appendix 1) and it is included in the costs quoted. | E |  |  |  |  |
| R.12.50 | Account management: please confirm your account management processes, including details of dedicated account manager for the group as a whole and each site. | E |  |  |  |  |
| R.12.51 | Review meetings to be held quarterly and SLA reports produced annually as a minimum | E |  |  |  |  |
| R.12.52 | Vendor to describe their support model - what are the expected turnaround times, do you use support packages, how will queries be logged and tracked? | E |  |  |  |  |
| R.12.53 | System upgrades and changes: describe the procedure, costing and timescales for creating custom features and enhancements to meet the needs of TCG and its member colleges? | E |  |  |  |  |
| R.12.54 | System upgrades and changes: what is the policy and procedure for releasing minor and major system updates, and its communication strategy? | E |  |  |  |  |
| R.12.55 | System upgrades and changes: where a client requests an additional feature that is subsequently built and implemented, will this be offered to other clients as part of the standard package or at an additional cost? | E |  |  |  |  |
| R.12.56 | Solution provider must provider TCG and its member colleges IT Services with appropriate and relevant Technical Documentation including on maintenance and support | E |  |  |  |  |
| R.12.57 | Solution provider to demonstrate they have carried out internal testing (including Penetration, Security, Load, etc.) to the need of TCG and its member colleges This encompasses the vendor to provide the following test documentation:  Test Strategy. Test Schedule (for all activities). Test Progress Reports. Test Scripts/Cases/Scenarios. Test Results. Defect Logs. Test Exit Report. Test Completion Sign Off.  Any certification should be demonstrated as well as evidence of regular ongoing testing & retesting at TCG and/or its member college's Request | E |  |  |  |  |
| R.12.58 | Training/materials: full system training/materials should be provided at both technical and end-user level, customised for site-specific cases as relevant. Please provide details of materials available and format. | E |  |  |  |  |
| R.12.59 | Documentation expectations are user guides, a blog and webinars which can be agile and updated. | E |  |  |  |  |
| R.12.60 | Calendar synchronisation responsive enough to prevent the double booking of appointment slots  Data validation used to prevent errors, providing existing system data as drop-downs as opposed to free text wherever possible  Hover over question mark pop-ups to explain more complicated fields/menus - with links referencing existing system guidance/documentation | E |  |  |  |  |
| R.12.61 | Each college/member service must have its own separate/local instance from the rest of the colleges/member services and reflects the institution’s own branding and colour themes. Colleges/member services must not see other colleges/member services data, branding and settings. With the exception of the central TCG instance that can report on all colleges/member services data under the UoL/TCG umbrella. | E |  |  |  |  |
| R.12.62 | User group activity: please provide the details of any solution user groups or forum that may exist, how frequently they interact and any examples of user-driven improvements to the solution arising from the group(s). | E |  |  |  |  |
| R.12.63 | UX: User interface and functions should be intuitive, user friendly and easy to navigate  Design: The solution must be consistent in design, aesthetics and formatting relevant to core user groups (i.e. formatting for students, employers and administrator groups may differ but be internally consistent) | E |  |  |  |  |
| R.12.64 | Effective knowledge transfer of the solution and process(as) must be provided by the provider before the solution 'Go-Live' date. System training designed for end users, TCG and member colleges' Project Teams including Application Support Team, End User Support Team and their Service Desk to assist them in understanding the functionality and technical information of the solution. | E |  |  |  |  |
| R.12.65 | Implementation plan: please provide an outline implementation plan for the project, including a breakdown of roles and responsibilities for the installation, configuration and testing of the solution - (Supplier / Customer). | E |  |  |  |  |
| R.12.66 | Please add your software license or subscription terms and conditions as an appendix to your quote submission. | E |  |  |  |  |
| R13 | **Online payments** | | | | | |
| R.13.1 | Merchant accepts only 3D Secure transactions? | E |  |  |  |  |
| R.13.2 | Are return, refund, cancellation and minimum age policies stated? | E |  |  |  |  |
| R.13.3 | Is the merchant's name, trading address and country, displayed on either the payment page or within the sequence of pages the cardholder accesses during the payment process? | E |  |  |  |  |
| R.13.4 | Does the website or T&C contain a privacy statement covering use of customer data? | E |  |  |  |  |
| R.13.5 | Is there a "click to accept" or other acknowledgement button for customers to accept T&C, including return/refund policy? | E |  |  |  |  |
| R.13.6 | Are card association marks correctly displayed? | E |  |  |  |  |
| R.13.7 | Is there a complete and clear description of merchant's goods and services, for example, electrical goods, voltage requirements are provided? | E |  |  |  |  |
| R.13.8 | Does the website ensure that the cardholder understands that the merchant is responsible for the transaction including delivery of the product or service. | E |  |  |  |  |
| R.13.9 | Is transaction currency clearly displayed, including country name, when the name of the currency is not unique, for example, US Dollar, Australian Dollar? | E |  |  |  |  |
| R.13.10 | Are Terms & Conditions of purchase included in Website? | E |  |  |  |  |
| R.13.11 | Is there a clear delivery policy for those items that require physical delivery? | E |  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Ref** | **Requirement** | **Essential** | **Answer** | |
| **Solution Security**  Please note all questions in this section are Essential and to be answered in detail (rather than Yes / No) | | | | |
| R.14.1 | Data in transit protection  Please explain how customer data transiting networks is adequately protected against tampering (integrity) and eavesdropping (confidentiality) via a combination of network protection and encryption. | E |  | |
| R.14.2 | **Asset protection and resilience**  Please explain where the data is to be stored geographically, (including any colocation data centres) and how physical resilience and availability is achieved. | E |  | |
| R.14.3 | **Asset protection and resilience**  Please explain how data is protected at rest, including cryptographic controls and/or physical security measures. | E |  | |
| R.14.4 | **Asset protection and resilience**  Please explain how data is sanitised following provisioning, migration and de-provisioning resources, as well as at equipment disposal or by request from the customer. | E |  | |
| R.14.5 | **Separation between consumers**  Please explain how separation is achieved between different consumers of the service to prevent one malicious or compromised consumer from affecting the service or data of another. | E |  | |
| R.14.6 | **Governance framework**  Please explain how your security governance framework coordinates and directs your overall approach to the management of the service and information within it. Include any certification to recognised security standard (e.g. ISO27001/2, PCI-DSS) | E |  | |
| R.14.7 | **Operational security**  Please explain the processes and procedures in place to ensure the operational security of the service, including: configuration and change management, vulnerability management, protective monitoring and incident management. | E |  | |
| R.14.8 | **Personnel security**  Please explain how you screen and manage personnel within any privileged roles, including how you ensure they understand their responsibilities and receive regular security training. | E |  | |
| R.14.9 | **Secure development**  Please explain how development is carried out in line with industry best practise regading secure design, coding, testing and deployment. | E |  | |
| R.14.10 | **Secure development**  Please explain how new and evolving threats are reviewed and the service improved in line with them, including the timeframes in which critical and non-critical patches are supplied. | E |  | |
| R.14.11 | **Supply chain security**  Please explain how the service supply chain satisfactorily supports all of the security principles that this service implements, including: third party procurement processes, management of conformance, security risks and verification that hardware and software is genuine and has not been tampered with. | E |  | |
| R.14.12 | **Supply chain security**  The use of any third party software, application or operating systems as part of the service must always be a version currently supported by the vendor. For the avoidance of doubt, it does not need to be the latest version but must be a supported version.  Upgrades must always take place before the support period ends.  Please confirm how your solution conforms to this requirement. | E |  | |
| R.14.13 | **Secure consumer management**  Please explain how customers are provided with the tools required to help them securely manage their service**,** including authentication, separation and access control within management interfaces. | E |  | |
| R.14.15 | **Identity and authentication**  Please explain how access to all service interfaces (for consumers and providers) is constrained to authenticated and authorised individuals. Include any implementations of multi-factor authentication, Single Sign-On (including any support for Azure AD/OpenID Connect), inactive session timeouts, maximum logon attempts, etc | E |  | |
| R.14.16 | **Identity and authentication**  Please verify that any stored passwords are protected with a salf and one-way hash, ideally using PBKDF2. | E |  | |
| R.14.17 | **External interface protection**  Please confirm that all external interfaces have appropriate protections to defend against attack.  Please advise how your solution conforms to this requirement | E |  | |
| R.14.18 | **External interface protection**  Penetration tests must be performed by qualified 3rd party testers before any new service is made live, at regular intervals and after any major system upgrade. It is the responsibility of the supplier to fix any identified vulnerabilities.  Upon commencement of contract, we will need to see evidence that this is actioned, if you are unable to share the reports, we require that we are able to conduct our own PEN Testing,  Please advise how your solution conforms to this requirement | E |  | |
| R.14.19 | **Secure service administration**  Please explain how the methods used to manage the operational service are designed to mitigate any risk of exploitation that could undermine the security of the service. | E |  | |
| R.14.20 | **Audit information provision to consumers**  Please explain what audit information will be provided to the customer, how and when it will be made available, the format of the data and retention period. | E |  | |
| R.14.21 | **Secure use of the service by the consumer**  Please explain how customers are informed of their responsibilities when using the service in order for it to remain secure and for their data to be adequately protected, including configuration options and security requirements on customer processes, use and infrastructure. | E |  | |
| R.14.22 | **Data Protection,**  Please detail how the solution safe guards personal data, specifically in relation the Data Protection Act (DPA) and impending GDPR. | E |  | |
| R.14.23 | **Data Protection / General Data Protection Regulation**  As you will be acting as a "Data Processor" for the University, please confirm that any of the University's user data obtained or stored in the provision of your services will not be processed for any other purposes than those specified the University's (e.g. the University's customer/user data will not be subject to your privacy policy  or terms and conditions, no advertising or personal data based analytics). | E |  | |
| **Ref** | **Requirement** | **Essential** | **Desirable** | **Comment** |
| R15 | **Additional Questions**  Please answer the following questions in detail rather than Yes / No | | | |
| R.15.1 | Please confirm the solution design will be the intellectual property (IP) of the University of London. If your solution contains any bespoke code or code libraries, please confirm if the IP will be transferred to the University of London.  It is acknowledged the software itself will remain the intellectual property of the vendor. | E |  |  |
| R.15.2 | Suppliers must provide details on how they will provide the services in a socially, economically and environmentally sustainable way. Please advise how you will deliver upon the key points of the [University’s Corporate Social Responsibility policy](http://www.london.ac.uk/5634.html?&no_cache=1&sword_list%5B%5D=responsibility)? | E |  |  |
| R.15.3 | Supply chain ethics  For the term of the contract the Supplier must ethically manage their employees, partners, supply chain, supplies and other resources to deliver a quality service to the University. Please advise your methodology for achieving this and how you maintain and monitor for the duration of the contract? | E |  |  |
| R.15.4 | Anti-money laundering regulations has two aspects - verifying transactions over a certain amount (£10,000) and ensuring we take appropriate steps to ensure that we identify the customer in order to confirm they are who they claim to be (Know Your Customer) as well as ongoing customer due diligence.  Please outline how your system can help with these requirements? |  | D |  |
| R.15.5 | Currency risk  Please advise how you will identify and manage currency risk on this contract?  Please confirm if there is a currency risk and if so, which currency and what % value of the contract is it? | E |  |  |
| R.15.6 | The University is very interested in any added value, benefits or innovation that the Supplier can provide to the University through the delivery of this contract.  Suppliers are encouraged to submit their added value proposals for this contract. |  | D |  |
| R.15.7 | Given what you understand of our aims and utlising your experience, what other features and functionality could your system offer that would be of value to us? | E |  |  |
| R.15.8 | The University of London encourages all of their Suppliers to support an internship, work experience or apprenticeship programme that benefits University of London students.  Please advise if you already have these programmes in place which the University can access or whether you would be willing to create them for Unviersity of London students. |  | D |  |
| R.15.9 | Please confirm how your company can help promote and market the benefits of the system to users, both internal and external. | E |  |  |

# Section F - Pricing Documents

It is anticipated that this implementation of this project will be paid at milestones based on key acceptance points within the project. Consequently we have laid the pricing table out in the expected payment schedule but please note that project acceptance is solely at the discretion of UoL and that the project will not move onto the next phase until the previous phase is accepted.

Please note the University does not pay on a time and materials basis but on a fixed price based on milestone payments, against project deliverables.

Please note UoL requires a 3 year contract, longer contract terms will not be considered.

If you anticipate your solution will have variable implementation costs depending onthe size of the institution then please detail that in the table below, repeatng the rows for Small, Medium, and Large institutions as defined in Section D of this RFQ.

Please complete the following table :

|  |  |  |  |
| --- | --- | --- | --- |
| Project | Phase | Price ex-vat | Price inc-vat |
| CSMS Phase 1 | Sign off of solution design document & scope of works |  |  |
|  | UAT |  |  |
|  | Go-Live |  |  |
|  | Training as consumed |  |  |
| Licensing or subscription costs p.a. | Annually |  |  |
| Annual software maintenance | Annually |  |  |

The University of London requires a flexible contract that will enable sites to join at different points in the contract or potentially not at all. Please detail below how the contract pricing would be constructed to enable this, showing the costs for adding and removing sites. As the cost matrix will vary depending on how your solution is licensed we are unable to be prescriptive. Please complete the table as per the matrix for your solution. The matrix could be number of sites, license subscriptions, students numbers, number of admin users etc. If there is a cost break e.g. additional discount after a certain number of licenses, then please also detal that in the table below.

If your solution is a flat rate regardless of number of sites etc then please also confirm that below.

|  |  |  |  |
| --- | --- | --- | --- |
| {Vendor to complete – matrix} | Quantity | Price ex-vat | Price inc-vat |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Section G – Supplier Information

# 1 Supplier details

| **INFORMATION REQUIRED** | **RESPONSE** |
| --- | --- |
| **Full name of your company**  State whether your company is acting as a sole company or as part of a consortium. If acting as part of a consortium, state the names of the other companies involved in the consortium; how long your company has been working with these other companies; and the nature of the services that these companies are providing to the consortium. |  |
| **Registered office and address** |  |
| **Company or charity registration number** |  |
| **VAT registration number** |  |
| **Date of formation (and date of registration in relevant state, if different from each other)** |  |
| **Name & address of immediate parent company** |  |
| **Name & address of ultimate parent company** |  |
| **Type of organisation (e.g. Public Ltd, Sole Trader etc)** |  |
| **Indicate of the principal areas of business activity of your firm** |  |
| **How many persons does your organisation normally employ?** |  |
| **Contact Name for Enquiries related to your response** |  |
| **Contact’s company position** |  |
| **Contact’s email address** |  |
| **Contact’s landline telephone number** |  |
| **Contact’s mobile telephone number** |  |

# 2 Financial and legal information

Please state ‘Yes’ or ‘No’ to each question. It is mandatory in tis RFQ that the questions below are answered positively; if a supplier cannot answer ‘no’ to every question in this section the RFQ they will not be approved. Suppliers should contact the relevant staff member at the University if there are questions regarding the completion of this form.

**Has your organisation or any directors or partner or any other person who has powers of representation, decision or control been convicted of any of the following offences?**

|  |  |  |
| --- | --- | --- |
| **A** | Conspiracy within the meaning of section 1 of the [Criminal Law Act 1977](http://www.legislation.gov.uk/ukpga/1977/45) where that conspiracy relates to participation in a criminal organisation as defined in [Article 2(1) of Council Joint Action 98/733/JHA (as amended)](http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A31998F0733) | Yes  No |
| **B** | Corruption within the meaning of section 1 of the [Bribery Act 2010](http://www.legislation.gov.uk/ukpga/2010/23/contents) | Yes  No |
| **C** | The offence of bribery, where the offence relates to active corruption | Yes  No |
| **D** | Bribery within the meaning of section 1 or 6 of the [Bribery Act 2010](http://www.legislation.gov.uk/ukpga/2010/23/contents) | Yes  No |
| **E** | The offence of cheating the Revenue | Yes  No |
| **F** | The offence of conspiracy to defraud | Yes  No |
| **G** | Fraud or theft within the meaning of the [Theft Act 1968](http://www.legislation.gov.uk/ukpga/1968/60/contents) and the [Theft Act 1978](http://www.legislation.gov.uk/ukpga/1978/31) | Yes  No |
| **H** | Fraudulent trading within the meaning of section 458 of [the Companies Act 1985](http://www.legislation.gov.uk/ukpga/1985/6/contents) or section 993 of the [Companies Act 2006](http://www.legislation.gov.uk/ukpga/2006/46/contents) | Yes  No |
| **I** | Fraudulent evasion within the meaning of section 170 of the [Customs and Excise Management Act 1979](http://www.legislation.gov.uk/ukpga/1979/2/section/139) or section 72 of the [Value Added Tax Act 1994](http://www.legislation.gov.uk/ukpga/1994/23/contents) | Yes  No |
| **J** | Defrauding the Customs within the meaning of the [Customs and Excise Management Act 1979](http://www.legislation.gov.uk/ukpga/1979/2/contents) and the [Value Added Tax Act 1994](http://www.legislation.gov.uk/ukpga/1994/23/contents) | Yes  No |
| **K** | Destroying, defacing or concealing of documents or procuring the extension of a valuable security within the meaning of section 20 of the [Theft Act 1968](http://www.legislation.gov.uk/ukpga/1968/60/contents) | Yes  No |
| **L** | Fraud within the meaning of section 2, 3, 4 or 7 of the [Fraud Act 2006](http://www.legislation.gov.uk/ukpga/2006/35/contents) | Yes  No |
| **M** | Money laundering within the meaning of section 340(11) of the [Proceeds of Crime Act 2002](http://www.legislation.gov.uk/ukpga/2002/29/contents) | Yes  No |
| **N** | An offence in connection with the proceeds of criminal conduct within the meaning of section 93A, 93B or 93C of the [Criminal Justice Act 1988](http://www.legislation.gov.uk/ukpga/1988/33/contents) or article 45, 46 or 47 of the [Proceeds of Crime (Northern Ireland) Order 1996](http://www.legislation.gov.uk/nisr/2016/33/made) | Yes  No |
| **O** | An offence in connection with the proceeds of drug trafficking within the meaning of section 49, 50 or 51 of the [Drug Trafficking Act 1994](http://www.legislation.gov.uk/ukpga/1994/37/part/I) | Yes  No |
| **P** | Any offence that includes non-compliance with the [Immigration, Asylum and Nationality Act 2006](http://www.legislation.gov.uk/ukpga/2006/13/contents), ensuring that your staff are eligible to work in the UK | Yes  No |
| **Q** | An offence under section 2 or section 4 of the [Modern Slavery Act 2015](http://www.legislation.gov.uk/ukpga/2015/30/contents/enacted) | Yes  No |

In the following section, please state ‘Yes’ or ‘No’ to each question below. Suppliers may be excluded from consideration if any of the following apply, though the University may decide to allow suppliers to proceed further. If suppliers cannot answer ‘no’ to every question it is possible that the application might not be accepted. In the event that any of the following do apply, please set out (in a separate document) full details of the relevant incident and any remedial action that was taken. The information provided will be taken into account by the University in considering whether or not a supplier will be able to proceed any further in respect of this procurement exercise.

**Are any of the following true of your business or organisation?**

|  |  |  |
| --- | --- | --- |
| A | Being an individual, is bankrupt or has had a receiving order or administration order or bankruptcy restrictions order made against him or has made any composition or arrangement with or for the benefit of his creditors or has not made any conveyance or assignment for the benefit of his creditors or appears unable to pay or to have no reasonable prospect of being able to pay, a debt within the meaning of section 268 of the Insolvency Act 1986, or article 242 of the Insolvency (Northern Ireland) Order 1989, or in Scotland has granted a trust deed for creditors or become otherwise apparently insolvent, or is the subject of a petition presented for sequestration of his estate, or is the subject of any similar procedure under the law of any other state | Yes  No |
| B | Being a partnership constituted under Scots law, has granted a trust deed or become otherwise apparently insolvent, or is the subject of a petition presented for sequestration of its estate | Yes  No |
| C | Being a company or any other entity within the meaning of section 255 of the [Enterprise Act 2002](http://www.legislation.gov.uk/ukpga/2002/40/contents) has passed a resolution or is the subject of an order by the court for the company’s winding up otherwise than for the purpose of bona fide reconstruction or amalgamation, or had a receiver, manager or administrator on behalf of a creditor appointed in respect of the company’s business or any part thereof or is the subject of similar procedures under the law of any other state | Yes  No |
| D | Has your organisation been convicted of a criminal offence relating to the conduct of your business or profession? | Yes  No |
| E | Has your organisation committed an act of grave misconduct in the course of your business or profession? | Yes  No |
| F | Has your organisation failed to fulfil obligations relating to the payment of social security contributions under the law of any part of the United Kingdom or of the relevant State in which you are established? | Yes  No |
| G | Has your organisation failed to fulfil obligations relating to the payment of taxes under the law of any part of the United Kingdom or of the relevant State in which you are established? | Yes  No |

# 3 Equality and diversity

| **INFORMATION REQUIRED** | **RESPONSE** | |
| --- | --- | --- |
| **Yes** | **No** |
| As an employer do you have an equal opportunities or diversity policy which describes your policies and practice not to treat one group of people less favourably than others in relation to decisions to recruit, train or promote employees because of their: |  |  |
| Pregnancy and Maternity |  |  |
| Marriage and Civil Partnership |  |  |
| Race |  |  |
| Sexual Orientation |  |  |
| Gender |  |  |
| Gender Re-assignment |  |  |
| Religion or Belief |  |  |
| Disability |  |  |
| Age |  |  |
| In the last three years has any finding of unlawful discrimination been made against your organisation by an employment or any other court? |  |  |
| In the last three years has your organisation been the subject of a formal investigation on grounds of alleged unlawful discrimination by, for example, Equality and Human Rights Commission (EHRC)? |  |  |
| If the answer to either of the last two questions above was yes, what actions were you required to take as a result of that finding or investigation? |  | |

|  |  |  |
| --- | --- | --- |
| **A** | Please self-certify that your organisation has an Equal Opportunities Policy statement that complies with current legislative requirements, and confirm this is available to employees, recognised trade unions or other representative groups; and in recruitment advertisements or other literature. | Yes    No |
| **B** | In the last three years, has any finding of unlawful discrimination been made against your organisation by an Employment Tribunal, an Employment Appeal Tribunal or any other court (or in comparable proceedings in any jurisdiction other than the UK)? | Yes    No |
| **C** | In the last three years, has your organisation had a complaint upheld following an investigation by the Equality and Human Rights Commission or its predecessors (or a comparable body in any jurisdiction other than the UK), on grounds of alleged unlawful discrimination?  If you have answered “yes” to one or both of the questions in this module, please provide, as a separate Appendix, a summary of the nature of the investigation and an explanation of the outcome of the investigation to date.  If the investigation upheld the complaint against your organisation, please explain what action (if any) you have taken to prevent unlawful discrimination from reoccurring. A separate appendix may be provided for this question | Yes    No |
| **D** | If you use sub-Contractors, do you have processes in place to check whether any of the above circumstances apply to these other organisations? | Yes    No |

# 4 Disclosure of Interest

Please state ‘Yes’ or ‘No’ to each question below. If you answered “yes” to any of the questions in A-C, please identify the pertinent individual(s) and their relationship to your company in the space E, below. If you answered “yes” to D below please provide information in the space E, below.

If suppliers cannot answer ‘no’ to every question the application may not be accepted. In the event that any of the following do apply, please provide full details in space E, including any remedial action that was taken. The information provided will be taken into account by the University in considering whether or not a supplier will be able to proceed any further in respect of this procurement exercise.

|  |  |  |
| --- | --- | --- |
| **A** | Does any member of the University of London Board of Trustees (a “Trustee”) serve as an officer or director of your company? | Yes  No |
| **B** | Does any immediate family member (spouse or dependent child) of a Trustee have an ownership interest in your company? | Yes  No |
| **C** | Does any University of London employee or their immediate family member serve as an officer, director, partner or sole proprietor of your company? | Yes  No |
| **D** | Are you aware of any other circumstances that could constitute a conflict of interest with the University? | Yes  No |
| **E** | In the space below please provide information on the above questions, if required: | |
|  |  | |

Schedule 7: RFQ Pricing Assumptions

### (Assumptions must only be included where these have not been able to be clarified during the clarification period)

|  |  |  |
| --- | --- | --- |
| **Pricing Assumption** | **Implications** | **Clarification attempt made (date of emailed query)** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# 

Schedule 8: Proposed Contract amendments

|  |  |  |
| --- | --- | --- |
| **Clause Number/Schedule ref** | **Proposed Amendment With Revised Wording** | **Cost Adjustment** |
|  |  |  |
|  |  |  |
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|  |  |  |

Other than those provisions identified above, [Tenderer to insert name] confirms that it has reviewed the terms and conditions of the proposed Contract and is content with its provisions

# 

# 

# Section G – Terms and Conditions / Form of Contract

This procurement is to be against UoL’s terms and conditions:



# Appendix 1

**Generic Service Level Agreement**

1. **Service Description**

{To be completed}

1. **Support Commitments**
2. **Support during Business Hours {amend as necessary to add out of hours}**

In order to maintain clear communication channels and receive effective support, UoL expects a defined support process, support team and contact details.

Support is provided by a team of people at the supplier with the full range of skills to maintain the relevant service. The primary and preferred point of contact for all support requests (i.e. problem reporting, change requests and advice) is via the Service Desk. Support is to be access via email, telephone call and portal to the Service Desk which will attempt first line fix and where not possible will escalate to the relevant internal support teams within the supplier.

Where a failure of a provided Service occurs, the supplier will work to achieving the response and resolution times defined below during Business hours.

1. **Incident Management Service Level Agreement**

The current Call Types UoL use are: Incident, Service Request, Request for Change, Complaint, Compliment and Out of Scope.

The following SLA values only apply where the call type = Incident\*

\*[ISO 20000](http://en.wikipedia.org/wiki/ISO_20000) defines an *incident* (part 1, 2.7) as:

*Any event which is not part of the standard operation of a service and which causes or may cause an interruption to, or a reduction in, the quality of that service.*

“Response time” *is defined as the time it (the Service Provider i.e. the supplier) has to accept a “call” as genuine and requires investigation as an incident or to reject the call.*

“Resolution time” *is the time it takes from the initial placement of the call to when the “Incident” has been diagnosed, any underlying problem identified and it is resolved or a mutually agreed workaround is implemented.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Priority** | **Definition** | **Response SLA** | **Resolution SLA** | **Response Performance** |
| P1 | Showstopper, significant business or user impact | 1 hour | 4 Hours | 95% |
| P2 | High priority, impacting effective use of the service for a significant number of users | 2 hours | 1 Business Day  i.e. 8 hours | 95% |
| P3 | Normal priority, service impaired for a small number of users | 4 hours | 3 Business Days  i.e. 24 hours | 90% |
| P4 | Low priority, service not functioning as expected, but not significantly affecting use | 1 business Day  i.e. 8 hours | 5 Business Days  i.e. 40 hours | 90% |

1. **Service Request Fulfilment**

Requests can cover a variety of requirements that are not due to a service interruption e.g. request for access, request for information etc. Service Requests are logged with the supplier by the same means as Incidents: directly to the supplier Service Desk by phone, email or via customer portal. UoL will receive an initial acknowledgment of the Service Request at the point of logging the request.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Call Type** | **Definition** | **Response SLA** | **Resolution SLA** | **Response Performance** |
| Service Request | A non-service impacting requirement | 1 business Day  i.e. 8 hours | 5 Business Days  i.e. 40 hours | 95% |

1. **Change Management**

A request for change can be invoked as a result of an enhancement, service scope change, new service, preventative maintenance or corrective maintenance activity.  Requests for change can be raised by either the supplier or UoL and are to be logged as request for change calls with the Service Desk. Where UoL logs the request for change call, the Service Desk is to promptly acknowledge that the call is logged however due to the potentially complicated nature of change there is no defined resolution time and it is accepted that there may be instances where the change is declined by the supplier.

The supplier is to ensure all requests for change are logged, evaluated, priced, signed-off and monitored with a further risk assessment if required. The supplier is to maintain the change records which are to be made available to UoL on request (given reasonable notice).

All changes which involve additional charges, change to the scope or nature of the contract, that may impact service or user experience require sign off by UoL, prior to the implementation of the change. Minor changes such as server patching which are not service or user impacting can remain within the supplier’s internal change procedures and do not require authorisation from UoL.

Emergency Change means an immediate change required to resolve an issue which is significantly affecting a service. In these circumstances, UoL should still be informed prior to the implementation of the change. However if this is not feasible, then the change should go ahead and review of the change should be actioned after the event. Emergency Changes are still to be recorded etc.as per a change request by the supplier and the number of Emergency Changes monitored to ensure that the process is not being abused. Changes must not be released during the hours of operations, unless it’s critical. The hours of operation are 08:00 to 20:00 (GMT/BST), changes ideally should be done in the following windows:

Between 20:01 Monday to 07:59 on Tuesday

Between 20:01 Tuesday to 07:59 on Wednesday

Between 20:01 Wednesday to 07:59 on Thursday

1. **Escalation Procedure**

Escalations can be initiated be both the supplier and UoL where response or resolution times are not met, or unlikely to be met (proactive escalation).

Escalation will be based on the priority of the call as follows:

1. **P1:** standard resolution time = 4hrs, escalate to Level 1 contact after 4hrs and Level 2 contact after 1 working day
2. **P2:** standard resolution time = 4hrs, escalate to Level 1 contact after 8hrs  and Level 2 contact after 2 working days
3. **P3:** standard resolution time = 2 working days, escalate to Level 1 contact after 5 working days, and Level 2 contact after a further 5 working days
4. **P4:** standard resolution time = 4 Business Days, escalate to Level 1 contact after a further 6 working days and Level 2 contact after a further 6 working days

Level 1 contact: {TO BE CONFIRMED BY SUPPLIER}

Level 2 contact: {TO BE CONFIRMED BY SUPPLIER}

1. **Complaints procedure**

If UoL is not satisfied with the supplier response or any other aspect of the Services, then a complaint may be raised. Complaints are to be reported to the Service Desk where they will be logged and referred to a member of the supplier’s senior management team.

All complaints must be acknowledged as received within 4 working hours and a response issued within 2 working days. If the customer is still not satisfied with the supplier’s response then the issue will be referred to the Dispute Resolution as per the contract.

1. **Maintenance and Release management**
2. **Maintenance Window**

The supplier operates a weekly maintenance window between 6:00am and 7:59am on Tuesday mornings (GMT/BST). During this period of time, the service may be either partially or wholly unavailable. The supplier will attempt where possible to provide at least five (5) days’ notice of maintenance activities that will impact the service. Downtime during this time period shall not be included in availability calculations.

The supplier have the right to perform essential maintenance (critical update) without notice if the service is deemed as a security risk.

1. **Release Cycle**

As software manufacturers release new versions or patches to supported software, the supplier will advise UoL of the new releases and work with UoL to implement them to a mutually agreed timetable. Software updates are to follow the Change Control Procedure as per above clause 2.3.

1. **Major Releases**

Where a software manufacturer releases a significant version increase (1 to 2), the supplier will advise UoL of the benefits and impacts of the new release and work with UoL to implement the new release to a mutually agreed timetable. The cost of implementing the major release will be included in the service charge. UoL will be responsible for User Acceptance Testing (UAT) prior to any major release going live.

1. **Minor Releases**

Any release not designated as a Major Release shall be considered a Minor Release. The supplier will advise UoL of any minor releases and schedule the installs at a mutually convenient time. Where the supplier becomes aware of issues with an update this should be discussed with UoL prior to recommending installation.

The supplier shall maintain configuration management records for the overall service, application modules and underlying infrastructure, including patch levels, both major and minor.

1. **Critical Updates**

The supplier may, at any time, decide to install a critical update for the purpose of improving security or for any other reason. As much notice as possible will be provided but any resulting outage will not contribute to calculations of unavailability according to the service levels defined in this Agreement. The supplier will promptly install any security patches as soon as they are available.

1. **Security**

The supplier as the host of the systems is responsible for ensuring both the physical and digital security of the systems and service. The supplier will follow industry standard best practise to secure and protect the service.

The University of London Penetration Testing Policy will apply to all web facing services.

{ADD SECURITY BASED ON QUESTIONNAIRE RESPONSE}

1. **Customer Data Storage**
2. **System Backups**

The UoL data on the servers managed by the supplier is backed up on a regular basis and retained as per the schedule below. These backups are performed to protect against critical server failure and are not seen as a method of restoring files accidentally deleted.

Data backup table:

|  |  |  |
| --- | --- | --- |
| **Service** | **Cycle** | **Retention** |
| {SERVER / SERVICE NAME} | Daily | 2 weeks |
| {SERVER / SERVICE NAME} | Weekly | 3 weeks |

The time required to restore a server following a critical failure system varies depending upon many different factors. In the event that the data on a server needs to be fully recovered from backups then the restore process will commence as soon as initial analysis has been performed and the server becomes usable. The restore process will be monitored continuously until the data is fully recovered and the applications are fully available again.

1. **Disaster recovery and Business Continuity**

{ADD Suppliers DR and BCP to be confirmed here along with any specific UoL requirements}

1. **Service Availability**

The service will be accessible twenty-four (24) hours a day, seven (7) days a week, with a 99.9% targeted uptime. 99.9% uptime means that for 99.9% of the time during any calendar month. Unavailability is a condition in which the service cannot be accessed, excluding during the planned maintenance window. Each instance of unavailability is a Service Outage.

If a Service Outage occurs, the supplier will notify the UoL’s Service Account Manager via email. This notice will include the reason for the Service Outage and the estimated time for restoration of the service if the supplier knows this information when it gives this notice. The supplier will also notify the UoL’s Service Account Manager via e-mail once the Service Outage is over and the Service is restored.

{ADD FORMULA FOR AVAILABILITY CALCULATION}

1. **Service Credits**

Where the combined service outages for a calendar month mean the service availability KPI is not met, the supplier will provide UoL with service credits based on the following table:

|  |  |
| --- | --- |
| **Service Availability** | **Amount of the refund as a percentage of monthly fee for affected Service** |
| 99.0% to 99.89% | 3% of monthly fee credited |
| 98.0% to 98.99% | 5% of monthly fee credited |
| 95.0% to 97.99% | 10% of monthly fee credited |
| 90.0% to 94.9% | 25% of monthly fee credited |
| 89.9% or below | 2.5% credited for every 1% of lost availability up to the maximum total penalty limit |

1. **Service Reporting**

1. **Monthly Reporting**

The supplier will provide UOL with one report per calendar month. That report will include the following information for the previous three (3) months:

* **Management Summary**;
* **Service Summary** - a narrative summary of the service bringing out major changes, opportunities, achievements, areas for improvement and performance;
* **Service Levels and Targets** - a presentation of the major service levels showing volumes and performance against target;
* **Incident and Problem Analysis** - summaries of incidents and problems arising, including:
* Number of incidents
* Average initial response time
* First time resolution rate
* Resolution within SLA
* Average incident resolution effort (hours)
* Number of repeated incidents
* **Changes** - summary of any major changes to the service including reorganisation, upgrade work undertaken and details of any Emergency Changes;
* **Projects & Development Requests** - information on any ongoing projects and developments;
* **Other Service Components** - any relevant information on other service components;
* **Security** - a summary of any security incidents such as attempted breaches, virus detection’s or similar;
* **Service Improvement**;
* **Customer Satisfaction Feedback** - results of any customer satisfaction survey information received.
* **Customer Complaints** – details of any complaints received and the response, including number of escalations and analysis of the complaints.

1. **Service Metrics**

The following Key Performance Indicators (KPIs) are to be included in the monthly report.

|  |  |  |
| --- | --- | --- |
| **KPI** | **Measurement** | **Metric** |
| First time Incident resolution rate | Percentage of Service Desks calls resolved at first response | 90% |
| Incident Resolution within SLA | Percentage of Service Desks calls  resolved within SLA | 95% |
| Service Availability | Uptime (excluding scheduled maintenance) | 99.9% |
| Custom Satisfaction | Percentage of satisfied users from incident feedback | 95% |