

**Office of the
Government Chief Information Officer**

USER MANUAL

**IT SOA FUNCTION
OF
E-PROCUREMENT SERVICE**

Version : 1.7

October 2014

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Amendment History				
Change Number	Revision Description	Pages Affected	Revision Number	Date
1.	Add “delivery status” and fax re-send description	Section 4.2.3	1.1	08 Jan 2014
2.	<ul style="list-style-type: none"> • Add note on “Complete” button • Screen Updated to align with the latest production environment 	Section 4.5.2, 4.5.3 & 4.6.1	1.2	23 Jan 2014
3.	Add section for the functions “Case Re-assign” and “Maintain Quotation Opening Team”	Section 6.1.1	1.3	27 Jan 2014
4.	Re-formatting	All Pages	1.4	8 Apr 2014
5.	Re-formatting and screen updated to align with the latest production environment	All Pages	1.5	9 May 2014
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7.	Update “Introduction” and “Overview of IT SOA Function of e-PS	Section 1, 2	1.7	14 Oct 2014

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1. INTRODUCTION

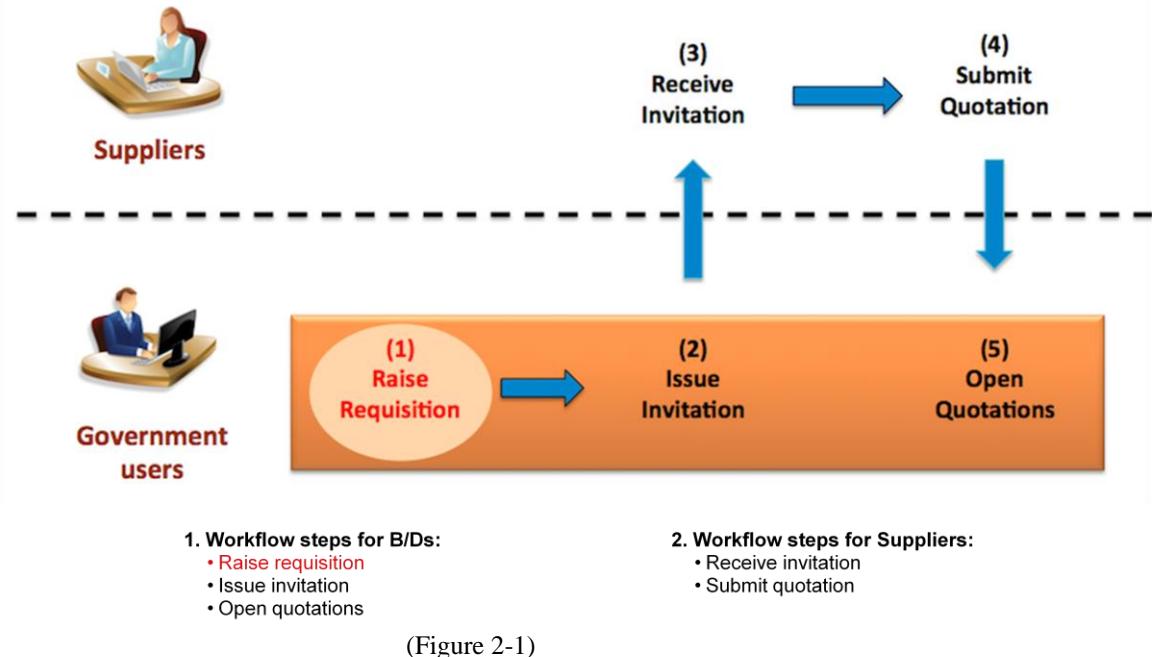
With the endorsement of the E-Government Steering Committee (“EGSC”) chaired by the Financial Secretary in March 2012, B/Ds are required to use the IT SOA Function of the e-Procurement Service (e-PS) to procure IT products and services (i.e. Network Products, Server Systems, PC Products and Related Services) under the corresponding Standing Offer Agreements (SOA).

The IT SOA Function was launched on 17 December 2013. Since then, the Function was progressively rolled out to different B/Ds, and the rollout was completed in June 2014.

2. OVERVIEW OF IT SOA FUNCTION OF E-PS

The IT SOA Function is a simple and easy-to-use solution for B/Ds to procure IT products and services under the corresponding SOA. In contrast to the Full Functions of the e-PS, which comprises a complete set of procurement workflows to support the whole procurement process, the IT SOA Function offers one common and generic procurement workflow to support the first few steps of the procurement process.

The procurement process supported by the IT SOA Function is illustrated below:



(Figure 2-1)

In general, there are five main steps along the procurement process:

1. Raise Requisition - B/Ds submit and vet (optional) the requisition request
2. Issue Invitation - B/Ds issue the invitation to quotation to suppliers
3. Receive Invitation - Suppliers receive the invitation and download the details
4. Submit Quotation - Suppliers submit the quotation
5. Open Quotations - B/Ds open the quotation box and download the quotations

Since the workflow of the IT SOA Function is common and generic to support all B/Ds, there are no rules incorporated in e-PS controlling which users can perform which tasks. B/Ds shall review their own SOA procurement procedures and decide how to make use of the IT SOA Function. Some usage scenarios are provided below for reference:

Scenario 1: End User Submitting Request via e-PS to Supplies Section for Issuing Invitation (with Vetting).

Department A

An end user prepares the requirement specification document and seeks approval for issuing the invitation outside e-PS (say manually by hardcopy or via email). He/she then logins e-PS and submits the requisition request to Supplies Officer using the IT SOA Function.

The Supplies Officer vets the requisition request and then issues the invitation to suppliers via e-PS. Upon the closing time, the Supplies Officer opens the quotation box via e-PS and downloads the quotation from the system. After that, the Supplies Officer continues the procurement process with the end user (e.g. evaluation of acquisition proposal) according to the procedures of the department.

Scenario 2: End User Submitting Request via e-PS to ITMU for Issuing Invitation (without Vetting).

Department B

An end user prepares the requirement specification document and seeks approval for issuing the invitation outside e-PS (say manually by hardcopy or via email). He/she then logins e-PS and submits the requisition request to ITMU user using the IT SOA Function.

The ITMU user issues the invitation to suppliers via e-PS. Upon the closing time, the ITMU user opens the quotation box via e-PS and downloads the quotation from the system. After that, the ITMU user continues the procurement process with the end user (e.g. evaluation of acquisition proposal) according to the procedures of the department.

Scenario 3: Administration Section Submitting Request and Issuing Invitation via e-PS

Department C

An end user prepares the requirement specification document, seeks approval for issuing the invitation and then sends all information to an Executive Officer of the administration section outside e-PS (say manually by hardcopy or via email).

The Executive Officer logins e-PS, submits the requisition request and then issues the invitation to suppliers by the IT SOA Function. Upon the closing time, the Executive Officer opens the quotation box via e-PS and downloads

the quotation from the system. After that, the Executive Officer continues the procurement process with the end user (e.g. evaluation of acquisition proposal) according to the procedures of the department.

No matter which of the above scenario is adopted, when an end user submits a requisition request through the IT SOA Function, he/she can select the corresponding user to perform each task along the procurement workflow, such as issuing the invitation and opening the quotation box. Apart from selecting an individual user, the IT SOA Function also supports selecting a user group to perform the tasks. There are two user groups for each B/D:

- a) Vetting Group
- b) Issuing Group

User administrators of each B/D can maintain the members of these two groups. When a user group (e.g. Issuing Group) is selected to perform a task, all members of the group will receive notification from the system. One of the group members shall then pick up the task and handle it accordingly. More information on how to submit a requisition request and select user groups can be found in Chapter 4 of the User Manual.

In summary, the IT SOA Function supports sending out invitation and receipt of acquisition proposals as stipulated in the SOA Acquisition Procedures. It is at B/D's discretion to decide the most suitable way of using the IT SOA Function. Since there is no procurement authority validation to check which users can perform which tasks, B/Ds shall perform the procurement authority checking following their current manual practice. In comparison with the IT SOA Function, the Full Functions of the e-PS offer a complete set of procurement workflows together with authority checking feature. More information of the Full Functions can be found on the portal page of the e-PS.

3. OVERVIEW OF USER INTERFACE

3.1 LOGIN AND LOGOUT

To login the e-Procurement System, please follow the steps below:

1. Login to user's Departmental Portal (DP)
2. Click the link to access e-Procurement Portal (For location of the link, please check with DP Administrator)
3. The landing page of e-Procurement Portal displays as below:



(Figure 3-1)

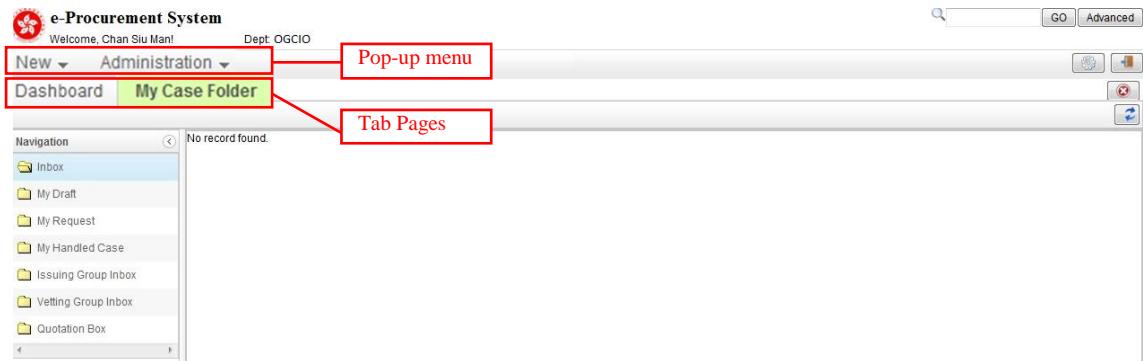
4. To logout e-Procurement System, click  button.



(Figure 3-2)

3.2 LANDING PAGE

The landing page is the first page loaded upon successful login the system as shown below. In this page, there are Pop-up menu and a set of tab pages. The Pop-up menu allows user to access various functions easily. The tab pages provide views for user to browse different kinds of records.



(Figure 3-3)

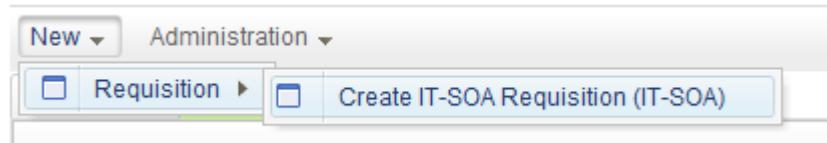
In addition, there are short-cut buttons in upper right side of the page.

1. Search Function
 - To perform basic search for case record by inputting case ID or advanced search for cases with search criteria
2. User Preference
 - To perform editing on User Preference setting
3. Close All Tab
 - To close all tab pages except Dashboard and My Case Folder tab pages
4. Refresh
 - To refresh contents displayed in the current screen

3.3 POP-UP MENU

3.3.1 New - Requisition

Create IT-SOA Requisition (IT-SOA) – To prepare and submit a new requisition request for purchase IT products / services under IT SOAs



(Figure 3-4)

3.3.2 Administration

The administration function is as follows:

1. Maintain User Profile - To maintain user profiles in the department (For user administrator only)
2. Block User Handled Case Administration - To remove user access right from a case
3. Grant Case Access Right - To grant access right of a case to other officer
4. Transfer Case Owner - To transfer case ownership to other officer



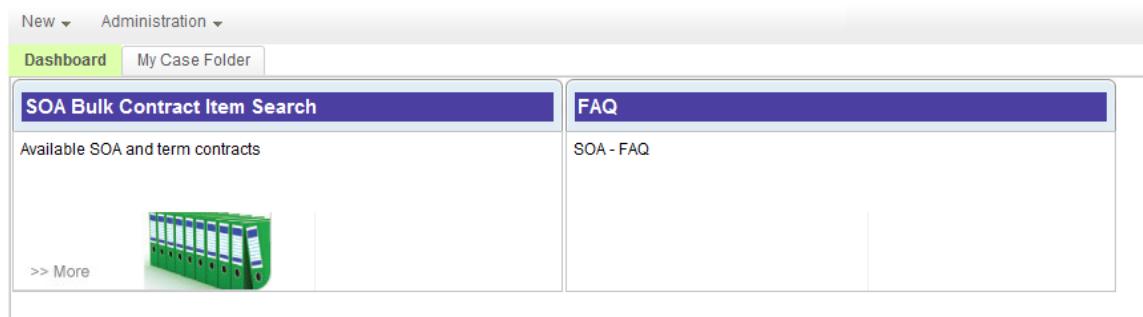
(Figure 3-5)

3.4 BASIC TAB PAGES

Upon successful login, two basic tab pages display.

3.4.1 Dashboard

- SOA Bulk Contract Item Search - To perform search on SOA Contract item
- FAQ - Link to Frequently Asked Questions (FAQs) for IT SOA of e-Procurement theme page



(Figure 3-6)

3.4.2 My Case Folder

My Case Folder tab page contains cases / requests accessible by user in different views.

- | | |
|------------------------|---|
| 1. Inbox | – Display the requests pending for the user's action |
| 2. My Draft | – Display the requests in draft status prepared by the user |
| 3. My Request | – Display the requests raised by the user |
| 4. My Handled Case | – Display the cases handled by the user |
| 5. Vetting Group Inbox | – Display the requests pending for members of Vetting Group to pick up or distribute |
| 6. Issuing Group Inbox | – Display the requests pending for members of Issuing Group to pick up or distribute |
| 7. Quotation Box | – Display the cases pending for members of Quotation Opening Team to open quotation box |

The screenshot shows a software application window titled 'My Case Folder'. At the top, there are 'New' and 'Administration' dropdown menus. Below them are two tabs: 'Dashboard' and 'My Case Folder', with 'My Case Folder' being the active one. On the left, a vertical 'Navigation' pane lists several categories: 'Inbox' (selected), 'My Draft', 'My Request', 'My Handled Case', 'Issuing Group Inbox', 'Vetting Group Inbox', and 'Quotation Box'. To the right of the navigation pane is a section titled 'Inbox' which displays a table of cases. The table has columns for a checkbox, a red exclamation mark icon, and 'Case ID'. Three rows are visible, each containing a checkbox, the exclamation mark icon, and the case ID 'OE314-00051', 'OE314-00049', and 'OE314-00026' respectively.

(Figure 3-7)

3.5 QUICK SORTING

The quick sorting feature is provided for the screens that list the records (e.g. case searching result, request list in the Inbox folder, etc.).

Click title of column to sort the records in ascending order of the respective column.

Case ID	Subject	Type	Case Handled On	Created By	Case Owned By	By Others
0E213-00070	Purchase Notebook and Operating System	SOA	22 Nov 2013 12:16:22	Chan Siu Man	PD(64)APII	
0E213-00072	Purchase Notebook and Operating System	SOA	21 Nov 2013 19:44:04	Chan Siu Man	PD(64)APII	
0E213-00085	Purchase Notebook and Operating System	SOA	25 Nov 2013 14:38:14	Chan Siu Man	PD(64)APII	
0E213-00086	Purchase Notebook and Operating System	SOA	25 Nov 2013 15:31:59	Chan Siu Man	PD(64)APII	
0E213-00088	Purchase Notebook and Operating System	SOA	26 Nov 2013 13:46:56	Chan Siu Man	PD(64)APII	
0E213-00089	Purchase Notebook and Operating System	SOA	26 Nov 2013 14:35:14	Chan Siu Man	PD(64)APII	
0E213-00095	Purchase Notebook and Operating System	SOA	26 Nov 2013 19:46:26	Chan Siu Man	PD(64)APII	
0E213-00122	Purchase Notebook and Operating System	SOA	02 Dec 2013 10:41:54	Chan Siu Man	PD(64)APII	

(Figure 3-8)

Click the title of column again and the sorting order will be changed to descending order.

Case ID	Subject	Type	Case Handled On	Created By	Case Owned By	By Others
0E213-00122	Purchase Notebook and Operating System	SOA	02 Dec 2013 10:41:54	Chan Siu Man	PD(64)APII	
0E213-00095	Purchase Notebook and Operating System	SOA	26 Nov 2013 19:46:26	Chan Siu Man	PD(64)APII	
0E213-00089	Purchase Notebook and Operating System	SOA	26 Nov 2013 14:35:14	Chan Siu Man	PD(64)APII	
0E213-00088	Purchase Notebook and Operating System	SOA	26 Nov 2013 13:46:56	Chan Siu Man	PD(64)APII	
0E213-00086	Purchase Notebook and Operating System	SOA	25 Nov 2013 15:31:59	Chan Siu Man	PD(64)APII	
0E213-00085	Purchase Notebook and Operating System	SOA	25 Nov 2013 14:38:14	Chan Siu Man	PD(64)APII	
0E213-00072	Purchase Notebook and Operating System	SOA	21 Nov 2013 19:44:04	Chan Siu Man	PD(64)APII	
0E213-00070	Purchase Notebook and Operating System	SOA	22 Nov 2013 12:16:22	Chan Siu Man	PD(64)APII	

(Figure 3-9)

3.6 EMAIL NOTIFICATION

An email notification will be issued to the relevant officer along the processing stages, such as notification to vet the requisition, notification for the request rejected, notification to issue invitation to quotation, etc. Normally, the email notification will be delivered to user's Notes Lotus email account.

Email Sample

Dear Chan Tai Man,

Chan Chung Man PD(64)API has submitted a requisition request to you. Details are listed below –

Case No: 0E213-00139

Subject: Purchase Notebook and Operating System

Raised by: Chan Siu Man PD(64)APII

Task: Issue Invitation

Please click the following link to process the request

<https://10.104.17.33/eprocurement/open.zul?caseld=1070000000000000145&requestId=1070000000000000252>

Regards,

e-Procurement System

(Figure 3-10)

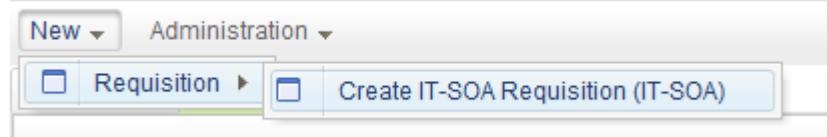
4. PROCUREMENT WORKFLOW

4.1 SOA REQUISITION REQUEST

4.1.1 Prepare and Submit Requisition Request

To create a new requisition, please follow steps below or use Copy Requisition function mentioned in Section 8.4:

Click New → Click Requisition → Click Create IT-SOA Requisition (IT-SOA)



(Figure 4-1)

SOA Requisition page in Prepare stage displays.

The screenshot shows the SOA Requisition (R003) page in the Oracle Applications interface. The top navigation bar has tabs for 'New', 'Administration', 'Requisition', and 'Create IT-SOA Requisition (IT-SOA)'. The 'Requisition' tab is active. Below the navigation is a toolbar with 'Save', 'Submit', 'Approval Form for Issuing Invitation', 'Print to PDF', and other icons. The main content area is divided into sections:

- Basic Information:** Fields include Subject (dropdown), SOA Type (dropdown), Acceptance Criteria (radio buttons for Itemised, Group, Overall), and Assessment (radio buttons for Single-Envelope, Two-Envelope, and Marking Scheme).
- Declaration:** A checkbox for "I declare that there is no conflict of interest in accordance with SPR 185 and 186".
- Item Details:** A table with columns for Item No., Description, Unit, and Qty. One row is shown with item number 1. An "Add Item" button is at the bottom.
- Summary:** A field labeled "Est. Total Amt. (HKD)" with an input box.

(Figure 4-2)

Click button to expand or button to collapse all parts of information.

The screenshot shows the 'SOA Requisition (R003)' interface. At the top, there are buttons for 'Save', 'Submit', 'Approval Form for Issuing Invitation', 'Print to PDF', and a refresh icon. Below this is a navigation bar with tabs: 'SOA Requisition' (selected), 'Prepare' (highlighted in orange), 'Vet', and 'Issue'. The main area contains eight sections, each with a plus sign icon to its left: 'Basic Information', 'Item Details', 'Supplier Invitation List', 'Quotation Document to Supplier', 'Proposal Submission Details', 'Quotation Opening Team Members', 'Processing Path', and 'Internal Reference'. Each section is represented by a horizontal bar.

(Figure 4-3)

Click the section heading to expand or collapse details of the section. It is required to fill in information for the requisition request in 8 areas as below.

1. Basic Information
2. Item Details
3. Supplier Invitation List
4. Quotation Document to Supplier
5. Proposal Submission Details
6. Quotation Opening Team Members
7. Processing Path
8. Internal Reference

4.1.1.1 Basic Information

The basic information (Subject, SOA Type, Acceptance Criteria and Assessment) must be provided.

The screenshot shows the 'Basic Information' section of the SOA Requisition form. It includes fields for 'Subject' (containing 'Purchase Notebook with Operating System'), 'SOA Type' (set to 'PC SOA - PC Products'), 'Acceptance Criteria' (radio buttons for 'Itemised', 'Group', and 'Overall'), and 'Assessment' (radio buttons for 'Single-Envelope', 'Two-Envelope', and a 'Marking Scheme' button). Below the form is a 'Declaration' section with a checkbox and a note: '- I declare that there is no conflict of interest in accordance with SPR 185 and 186'.

(Figure 4-4)

Data Field Description

Field Name	Field Description	

Field Name	Field Description	
Subject	Subject of the procurement case (maximum 200 characters)	Mandatory
SOA Type	SOA Term Contract (PC SOA / Network & Server SOA)	Mandatory
Acceptance Criteria	Itemised: Offers in individual item basis Group: Offers in groups of items basis Overall: Offers in overall basis	Mandatory
Assessment	To indicate assessment of the requisition in Single-Envelope or Two-Envelope approach. If Two-Envelope is selected, marking scheme must be defined. Then, Marking Scheme button will be enabled. For details, please refer to Section 8.1 Marking Scheme.	Mandatory
	<input checked="" type="radio"/> Assessment <input type="radio"/> Single-Envelope <input checked="" type="radio"/> Two-Envelope <input type="button" value="Marking Scheme"/>	

4.1.1.2 Item Details

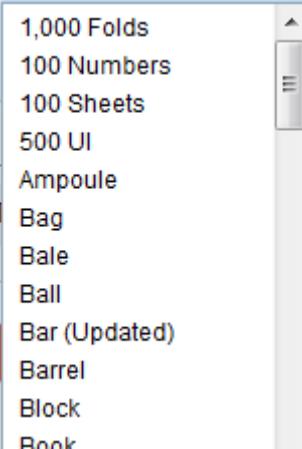
The item details of purchasing products / services (Group No., Description, Unit, Quantity, and Estimated Total Amount) must be provided.

Item Details					
Item No.	Grp No.	Description	Unit	Qty.	
1	1	Notebook	Set	1.00	<input type="button" value="Delete"/>
2	2	Operating System	Set	1.00	<input type="button" value="Delete"/>
Add Item Est. Total Amt. (HKD) 30,000.00					

(Figure 4-5)

Data Field Description

Field Name	Field Description	
Grp No.	3-digit group identifier of the item This is available if the Acceptance Criteria is in Group basis.	Mandatory
Description	Item description (maximum 300 characters)	Mandatory

Field Name	Field Description	
Unit	<p>Unit of measurement of the item. A list of unit is available for selection.</p> 	Mandatory
Qty.	Quantity of the item	Mandatory
Est. Total Amt.(HKD)	Estimated amount for the requisition request in Hong Kong Dollars in 2-decimal place	Mandatory

Button Description

Button	Description
	To move the selected item up or down to change the order
	To remove the selected item
<u>Add Item</u>	<p>To add a new item</p> <p>When the link is clicked, a new row will be inserted.</p>

4.1.1.3 Supplier Invitation List

According to the selected SOA Type and Categories, a list of SOA Contractors is generated and displayed.

The screenshot shows a user interface titled "Supplier Invitation List". At the top, a message asks to select categories for invitation. Below is a list of categories with checkboxes: "All Categories" (unchecked), "A - Total System Solution" (unchecked), "B - Add-on Software" (checked), and "C - Printers" (unchecked). A note below asks if the number of contractors meets the minimum required, with radio buttons for "Yes" (selected) and "Less than minimum number & justification is given below". The main area displays a table of "SOA Contractor" details. The first row shows company name "E-Service Testing Company" and address "TEST". It lists two contacts: "Chris" (phone 25737113, status online) and "Vincent Yau" (phone 12345678, status online). Each contact has a "Remove from invitation list" link and search icons. A "More Contact" link is at the bottom. The entire interface has a light yellow background.

(Figure 4-6)

Data Field Description

Field Name	Field Description	
Please select the category against which the SOA Contractors will be invited for submitting Acquisition Proposal	<p>To select one or more categories under the SOA Term Contract Type</p> <p><input type="checkbox"/> All Categories <input type="checkbox"/> A - Total System Solution <input checked="" type="checkbox"/> B - Add-on Software <input type="checkbox"/> C - Printers</p> <p>The available categories depend on the selected SOA Type.</p>	Mandatory
Does the number of SOA Contractors invited meet the minimum required?	<p>To declare minimum number of SOA Contractors invited according to relevant SPRs and Standing Offer Agreements. Otherwise, justifications must be provided in the text box.</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> Less than minimum number & justification is given below</p>	Mandatory
Remove from invitation list	<p>To remove the selected supplier from the invitation list</p> <p>When the checkbox is ticked, the contact person information is hidden.</p>	Optional

Field Name	Field Description	
	Contact point of invited supplier	Mandatory
	Fax number of the contact point Notes: 1. The format of fax number is in 8-digit without space or starting with '852' followed by 8-digit without space. 2. Checking on fax number against with Do-not-call Register will perform. 3. An oversea fax number is not supported.	Mandatory

Input Button Description

Button	Description																														
	To display the invitation delivery status of the supplier																														
	To view the invitation cover letter																														
<u>More Contact</u>	<p>To add contact person for the respective supplier. A pop-up window will be displayed for selection or a new contact creation.</p> <table border="1"> <thead> <tr> <th>Contact Name</th> <th>Post</th> <th>Tel. No.</th> <th>Fax. No.</th> <th>Email</th> <th>EService Account</th> </tr> </thead> <tbody> <tr> <td>Bryan Wong</td> <td>-</td> <td>2332332232</td> <td>22225554</td> <td>bckwong@ogcio.gov.hk</td> <td>Sub Account</td> </tr> <tr> <td>Chris</td> <td>-</td> <td>3242342323</td> <td>25737113</td> <td>syhchiang@ogcio.gov.hk</td> <td>Master</td> </tr> <tr> <td>Sunny E-Testing</td> <td>-</td> <td>29618235</td> <td>12345678</td> <td>syhchiang@ogcio.gov.hk</td> <td>Sub Account</td> </tr> <tr> <td>Vincent Yau</td> <td>-</td> <td>29618235</td> <td>12345678</td> <td>vcmyau@ogcio.gov.hk</td> <td>Sub Account</td> </tr> </tbody> </table> <p>Select button: To select appropriate contact person(s) Clear button: To clear the selection No suitable contact and I would like to add one by myself button: To add a new contact person by user input. Then, a new row appends in supplier contact person.</p>	Contact Name	Post	Tel. No.	Fax. No.	Email	EService Account	Bryan Wong	-	2332332232	22225554	bckwong@ogcio.gov.hk	Sub Account	Chris	-	3242342323	25737113	syhchiang@ogcio.gov.hk	Master	Sunny E-Testing	-	29618235	12345678	syhchiang@ogcio.gov.hk	Sub Account	Vincent Yau	-	29618235	12345678	vcmyau@ogcio.gov.hk	Sub Account
Contact Name	Post	Tel. No.	Fax. No.	Email	EService Account																										
Bryan Wong	-	2332332232	22225554	bckwong@ogcio.gov.hk	Sub Account																										
Chris	-	3242342323	25737113	syhchiang@ogcio.gov.hk	Master																										
Sunny E-Testing	-	29618235	12345678	syhchiang@ogcio.gov.hk	Sub Account																										
Vincent Yau	-	29618235	12345678	vcmyau@ogcio.gov.hk	Sub Account																										
	To remove the supplier contact person																														

4.1.1.4 Quotation Document to Supplier

The quotation document may be provided.

No	Filename	File Description	Release Source	Created By	
1	Notebook Spec.doc	Purchasing Notebook Spec		Chan Tai Man	

Remarks to supplier [Optional] [Edit](#)

(Figure 4-7)

Data Field Description

Field Name	Field Description	
File Name	Display the name of file uploaded to the system	Mandatory
File Description	Description of the uploaded file If the file is uploaded, the file description is mandatory to input.	Mandatory
Release Source	Release the original source of document in external e-Procurement Portal for supplier download The system will combine all uploaded quotation document(s) in the order of sequence number into a single PDF file for supplier download.	Optional
Remarks to supplier	Click Edit link to input the remarks to supplier. Remarks will be displayed in external e-Procurement Portal to supplier.	Optional

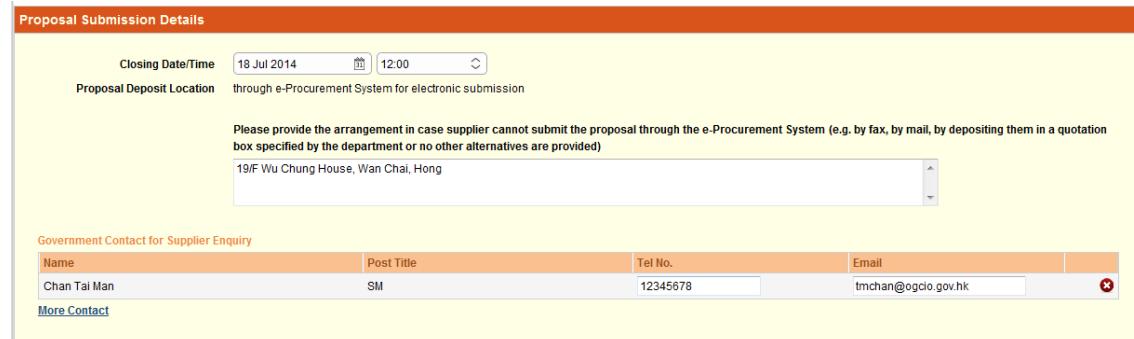
Input Button Description

Button	Description
	To move the selected item up or down to change the order
Upload	To browse and upload file Notes: 1. The file should be in Word, Excel, PDF, or Plain Text format. 2. The maximum file size of each uploaded document is 5 MB.
	To view the original uploaded file
	To remove the uploaded file
	To view the combined document This button is only available in Issue Invitation of Quotation Stage.

Button	Description
	To replace the document This button is only available in Issue Invitation of Quotation Stage.

4.1.1.5 Proposal Submission Details

The proposal submission details must be provided.



The screenshot shows a form titled "Proposal Submission Details". It includes fields for "Closing Date/Time" (set to 18 Jul 2014 at 12:00), "Proposal Deposit Location" (set to "through e-Procurement System for electronic submission"), and a note about alternative submission methods. Below these are sections for "Government Contact for Supplier Enquiry" (listing Chan Tai Man as SM with contact info) and a note about "Special Arrangement under Bad Weather".

Government Contact for Supplier Enquiry			
Name	Post Title	Tel No.	Email
Chan Tai Man	SM	12345678	tmchan@ogcio.gov.hk

(Figure 4-8)

Special Arrangement under Bad Weather

In case if a black rainstorm warning or a tropical cyclone signal No. 8 or above is hoisted (“inclement weather signal”) any time within three hours prior to the quotation closing time on the quotation closing date, the quotation closing date will be extended to the first working day (except Saturday, Sunday and public holiday) at the same closing time when no inclement weather signal has been hoisted any time within three hours prior to such closing time. In the event of any extension, references to “quotation closing date and time” shall be construed as the extended quotation closing date and time.

Data Field Description

Field Name	Field Description	
Closing Date/Time	Closing date and time of the invitation to quotation	Mandatory
Proposal Deposit Location	Suppliers have to submit proposals through e-Procurement System for electronic submission	Non-Editable
Please provide the arrangement in case supplier cannot submit the proposal through the e-Procurement System	Specify arrangement in case supplier cannot submit the proposal through the e-Procurement System (e.g. by fax, by mail, by depositing them in a quotation box specified by the department or no other alternatives are provided)	Mandatory

Field Name	Field Description	
Government Contact for Supplier Enquiry (Name)	Name of the Government contact person By default, the requestor name is assigned.	Non-Editable
Government Contact for Supplier Enquiry (Post Title)	Post Title of the Government contact person By default, post title of the requestor is assigned.	Non-Editable
Government Contact for Supplier Enquiry (Tel No.)	Telephone number of the Government contact person By default, telephone number of the requestor is assigned.	Mandatory
Government Contact for Supplier Enquiry (Email)	Email of the Government contact person By default, Notes email of the requestor is assigned.	Optional

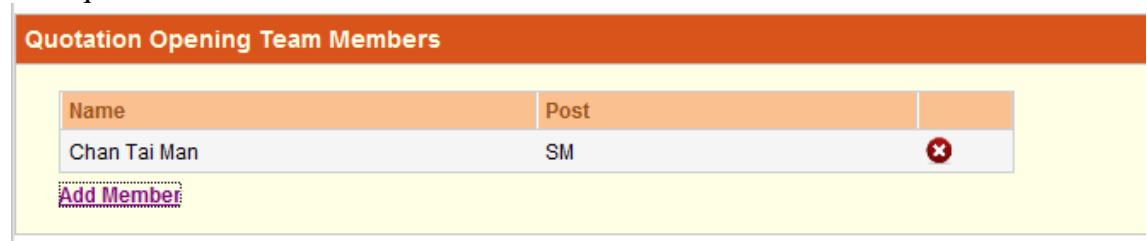
Input Button Description

Button	Description
<u>More Contact</u>	To add Government contact person When the link is clicked, Search User window pops up. After a contact person searched and selected, the details of contact person show in the Government Contact for Supplier Enquiry table. For details on search user, please refer to the Section 8.2.
	To remove the corresponding Government contact person

4.1.1.6 Quotation Opening Team Members

The quotation opening team member must be provided. The information will be auto-assigned according to Default Quotation Opening Team under User Preference if any. For details on Default Quotation Opening Team, please refer to Section 5.3.

At least one quotation opening team member must be provided. For requisition with total estimated amount > \$50K, at least two quotation opening team members are required.



Quotation Opening Team Members		
Name	Post	
Chan Tai Man	SM	
Add Member		

(Figure 4-9)

Data Field Description

Field Name	Field Description	
Name / Post	Name and post of quotation team member	Non- Editable / Mandatory

Input Button Description

Button	Description
<u>Add Member</u>	To add quotation opening team member When the link is clicked, Search User window pops up. After a member searched and selected, the details of member show in the table. For details on search user, please refer to the Section 8.2.
	To remove the corresponding quotation opening team member

4.1.1.7 Processing Path

The processing path must be provided. The information will be auto-assigned according to Default Processing Officer for Create IT-SOA Requisition (IT-SOA) Function under User Preference if any. For details on Default Processing Officer, please refer to Section 5.2.

An individual officer or a group is allowed to assign in Vet Requisition or Issue Invitation task. If a task assigns to a group instead of an officer, it will be delivered to Vetting / Issuing Group Inbox folder instead of Inbox folder of the officer.

Notes: When the requisition request is submitted, it will go through the following processes:

Submit Requisition → Vet Requisition (Optional) → Issue Invitation of Quotation

An individual officer is assigned in the task as follow. The Vet Requisition Request and Issue Invitation tasks will deliver to Inbox folder of Chan Chung Man and Inbox folder of Chan Tai Man respectively.

Processing Path			
Task Name	Mandatory	Officer Name	Post Title
Submit Requisition Request	Yes	Chan Tai Man	SM
Vet Requisition Request	Add Officer (Max 2)	Chan Chung Man	AP
Issue Invitation	Yes	Chan Siu Man	CO

(Figure 4-10)

A group is assigned in the task as follow. The Vet Requisition Request and Issue Invitation tasks will deliver to Vetting Group Inbox folder and Issuing Group Inbox folder respectively.

Processing Path				
Task Name	Mandatory	Officer Name	Post Title	
Submit Requisition Request	Yes	Chan Tai Man	SM	 
Vet Requisition Request	Add Officer (Max 2)	Vetting Group	Group	 
Issue Invitation	Yes	Issuing Group	Group	 

(Figure 4-11)

Data Field Description

Field Name	Field Description	
Mandatory / Officer Name / Post Title (Submit Requisition Request)	Mandatory: 'Yes' (the task is necessary) The officer submits the requisition request.	Non-Editable
Mandatory / Officer Name / Post Title (Vet Requisition Request)	Mandatory: 'No' (the task is not necessary) The individual officer or vetting group vets the requisition request. At most 2 vetting officers or groups are assigned for vetting the requisition.	Non-Editable / Optional
Mandatory / Officer Name / Post Title (Issue Invitation)	Mandatory: 'Yes' (the task is necessary) The individual officer or issuing group issues the invitation of quotation to suppliers.	Non-Editable / Mandatory

Input Button Description

Button	Description
<u>Add Officer</u>	To add one more officer for Vet Requisition Request task When the link is clicked, a new row will be inserted.
	To search officer / group and assign to process the task When the button is clicked, Search User / User Group window pops up. After an officer / a user group searched and selected, the details of information show in the table. For details on search user, please refer to the Section 8.2.
	To remove the corresponding officer / group from the processing task

4.1.1.8 Internal Reference

User may upload any documents and provide remarks for internal reference if necessary.

The screenshot shows a user interface titled "Internal Reference". At the top, there is a field for "Urgency [Optional]" with a dropdown menu. Below it is a field for "File Ref No. [Optional]" containing the value "GCIO X/XX". A table lists one uploaded file: "Contractor Invitation.xls" (No. 1), with a description "Contractor Invitation List" and created by "Chan Tai Man". There is a "Upload" button and a "Delete" button. At the bottom, a note says "You can input remarks for internal reference [Optional]" with an "Edit" link, followed by a rich text editor window.

(Figure 4-12)

Data Field Description

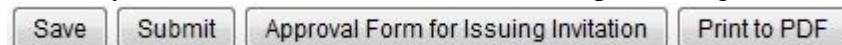
Field Name	Field Description	
Urgency	Indicate the urgency of the request	Optional
File Ref No.	Internal reference number for record	Optional
Filename	Display the name of file uploaded to system	Optional
File Description	Description of the uploaded file If the file is uploaded, the file description is mandatory to input.	Mandatory
You can input remarks for internal reference	<p>Click Edit link to input the remarks in the editor panel.</p> <p>You can input remarks for internal reference [Optional] Edit</p> <p>The rich text editor interface includes a "Subject" input field and a toolbar with various formatting options like bold, italic, underline, and alignment.</p> <p>User may input Subject and Details in the panel. The content can be formatted by using the editor features.</p>	Optional

Input Button Description

Button	Description
Upload	To browse and upload file Notes: 1. The file should be in Word, Excel, PDF, or Plain Text format. 2. The maximum file size of each uploaded document is 5 MB.
	To view the uploaded file
	To remove the uploaded file

4.1.1.9 Action Buttons

User may choose the action button for further processing.



(Figure 4-13)

Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed. The request can be found in the requestor's My Draft folder.
Submit	To submit the requisition request The system will perform validation on the user's inputs. If the validation is passed and the submit action is completed successfully, 1. A successful message will be displayed 2. If there is no Vet Requisition Request task, the system will render quotation document and combine the document in a single PDF format. This step will take a few minutes to process. 3. The request will be passed to next handler, who will be notified by email. If Vet Requisition Request task is required and the requestor is also the next handler, the system will ask whether the requestor continue the vetting task immediately or not.
Approval Form for Issuing Invitation	To generate formal document for seeking approval for issuing invitation of the requisition in Word document format
Print to PDF	To generate details of the request in PDF format

4.1.2 Pick / Distribute Requisition Request for Vetting

If the requisition request requires vetting by a Vetting Group, the requisition request will be available in the Vetting Group Inbox folder.

Case ID	Subject	Task	Submitted By	Date Sent	Amount	Type	Request
0E314-00060	Purchase Notebook with Operating System	Vet Requisition Request	Chan Tai Man	03 Jul 2014 18:09:54	HKD \$30,000.00	SOA	REQ

(Figure 4-14)

To handle the request, team member of the Vetting Group may tick check box to select the request, and click **Batch Pick** button to move the request to the Inbox folder.

On the other hand, the team member may select the request, and click **Batch Distribute** button to assign another officer to handle the vetting request. Then, the Search User window will pop up for selecting an officer for distribution. For details on search user, please refer to the Section 8.2.

After picked or distributed, a notification will send to the next handler and the handler may locate the request from the Inbox folder.

4.1.3 Vet Requisition Request

The Vetting Officer may locate the request from the Inbox folder. To perform the vetting, please follow the steps below:

1. Double click the request to retrieve the details in the Inbox folder

Case ID	Subject	Task	Submitted By	Date Sent	Amount	Type	Request
0E314-00060	Purchase Notebook with Operating System	Vet Requisition Request	Chan Tai Man	03 Jul 2014 18:09:54	HKD \$30,000.00	SOA	REQ

(Figure 4-15)

2. View the Request Summary with cover message and click **Request Details** button to view the details of the requisition request.

SOA Requisition

Subject: Purchase Notebook with Operating System
Requestor: Chan Tai Man

Dear Chan Tai Man ,
A SOA requisition request was submitted for your review please. Below please find its summary for your quick reference. Please click the following button to review the details. You can leave remarks and upload documents at the bottom of this page for internal reference.

[Request Details](#)

Request Summary

Procurement Type and Amount: SOA (HKD) 30,000.00
Closing Date/Time: 18 Jul 2014 12:00
Assessment: Single-Envelope
Acceptance Criteria: Group

Item Details

Item no.	Group no.	Item Description	Unit	Qty
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00

Supplier Invitation List

The number of supplier invited meets the minimum number required

SOA Category: PC Products - Add-on Software

Supplier Name:

- E-Service Testing Company 1
- New Testing 01
- Re-provision SIT Supplier 1
- Test Activate existing

(Figure 4-16)

3. Review and amend the details of the requisition request if necessary. For details on the fields and related buttons of the requisition, please refer to Sections 4.1.1.1 – 4.1.1.8.

The screenshot shows the SOA Requisition application in the 'Vet' step. The top navigation bar includes 'Save', 'Vet', 'Reject', 'Transfer', 'Approval Form for Issuing Invitation', 'Print to PDF', and other icons. The main sections are:

- Basic Information:** Subject: Purchase Notebook with Operating System; SOA Type: PC SOA - PC Products; Acceptance Criteria: Itemised (selected); Assessment: Single-Envelope (selected).
- Declaration:** A declaration box stating: "I declare that there is no conflict of interest in accordance with SPR 185 and 186".
- Item Details:** A table showing two items:

Item No.	Grp No.	Description	Unit	Qty.
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00

 Buttons for 'Add Item' and 'Delete' are visible.
- Supplier Invitation List:** A list of categories for invitation selection:
 - All Categories
 - A - Total System Solution
 - B - Add-on Software
 - C - Printers
 A question "Does the number of SOA Contractors invited meet the minimum required?" with options "Yes" (selected) and "Less than minimum number & justification is given below".
- SOA Contractor:** Details for one contractor:

1 SOA Contractor	<input type="checkbox"/> Remove from invitation list
Company Name	E-Service Testing Company 1
Address	TEST
Chris	<input type="checkbox"/> Online
25737113	
More Contact	

(Figure 4-17)

USER MANUAL OF IT SOA FUNCTION

Quotation Document to Supplier

* Please DO NOT upload internal document in this Part.
* Please ensure the document content HAS BEEN ALIGNED with your filled data.

No	Filename	File Description	Release Source	Created By	
1	Notebook Spec.doc	Purchasing Notebook Spec		Chan Tai Man	 

Upload

Remarks to supplier [Optional] [Edit](#)

Proposal Submission Details

Closing Date/Time: 18 Jul 2014 12:00

Proposal Deposit Location: through e-Procurement System for electronic submission

Please provide the arrangement in case supplier cannot submit the proposal through the e-Procurement System (e.g. by fax, by mail, by depositing them in a quotation box specified by the department or no other alternatives are provided)
19/F Wu Chung House, Wan Chai, Hong Kong

Government Contact for Supplier Enquiry

Name	Post Title	Tel No.	Email
Chan Tai Man	SM	12345678	tmchan@ogcio.gov.hk

[More Contact](#)

Quotation Opening Team Members

Name	Post
Chan Tai Man	SM

[Add Member](#)

(Figure 4-18)

Processing History of the request is available at the bottom of the page.

Processing History and Remarks				
<p>Note</p> <p>- The following officer(s) has/have declared that there is no conflict of interest in accordance with SPR 185 and 186</p>				
<p>Submit Requisition Request - Submit</p>  Chan Tai Man , SM (Tel:)  TM Chan/OCCIO/HKSARG				03 Jul 2014 18:09:54
<p>Vet Requisition Request - Batch Pick</p>  Chan Tai Man , SM (Tel:)  TM Chan/OCCIO/HKSARG				04 Jul 2014 12:39:06

Processing Path				
Task Name	Mandatory	Officer Name	Post Title	
Vet Requisition Request	Add Officer (Max 2)	Chan Tai Man	SM	 
Issue Invitation	Yes	Issuing Group		 

Internal Reference														
<p>Urgency [Optional] <input type="checkbox"/></p> <p>File Ref No. [Optional] GCIO X/XX</p> <table border="1"> <thead> <tr> <th>No</th> <th>Filename</th> <th>File Description</th> <th>Created By</th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Contractor Invitation.xls</td> <td>Contractor Invitation List</td> <td>Chan Tai Man</td> <td> </td> </tr> </tbody> </table> <p>Upload</p> <p>You can input remarks for internal reference [Optional] Edit</p>					No	Filename	File Description	Created By		1	Contractor Invitation.xls	Contractor Invitation List	Chan Tai Man	 
No	Filename	File Description	Created By											
1	Contractor Invitation.xls	Contractor Invitation List	Chan Tai Man	 										

(Figure 4-19)

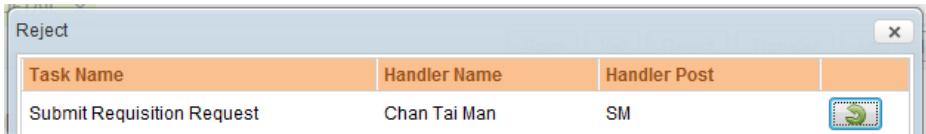
4. Choose the action button for further processing.

Save	Vet	Reject	Transfer	Approval Form for Issuing Invitation	Print to PDF
-------------	------------	---------------	-----------------	---	---------------------

(Figure 4-20)

Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed.
Vet	To complete the vetting process The system will perform validation on the user's inputs. If the validation is passed and the vet action is completed successfully, 1. A successful message will be displayed 2. If there is no further Vet Requisition Request task, the system will render quotation document and combine the document in a single PDF format. This step will take a few minutes to process. 3. The request will be passed to next handler, who will be notified by email.

Button	Button Description
Reject	To reject the requisition request A pop-up window will be displayed to define next handler of the rejected request by clicking  button. The next handler can be the requestor or the previous vetting officer of the request if appropriate.  Then, a successful message will be displayed and the request will be passed to next handler, who will be notified by email.
Transfer	To transfer the request to another officer for vetting When the button is clicked, Search User window will pop up for selecting an officer to transfer for vetting. For details on search user, please refer to the Section 8.2. A notification of the transfer action will send to original handler and assigned handler by notification email.
Approval Form for Issuing Invitation	To generate formal document for seeking approval for issuing invitation of the requisition in Word document format
Print to PDF	To generate details of the request in PDF format

4.1.4 Re-submit / withdraw / transfer Requisition Request

To re-submit / withdraw / transfer the requisition request, the handler may follow the steps below:

1. Retrieve the request from the Inbox folder for re-submit/transfer or from My Request folder for withdrawal by double clicking the request
2. View the Request Summary with cover message and click **Request Details** button to view the details of the requisition
3. Review and amend the details of the requisition request
4. Choose the action button for further processing.



(Figure 4-21)

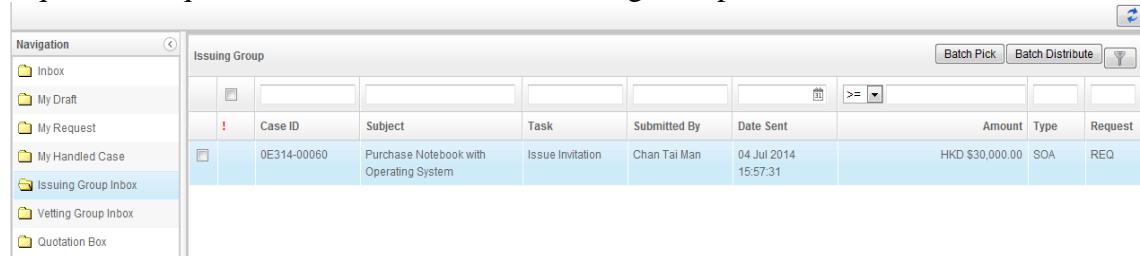
Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed. Notes: Only the request has been rejected, the button will be available.
Re-submit	To re-submit the requisition request The system will perform validation on the user's inputs. If the validation is passed and the re-submit action is completed successfully, 1. A successful message will be displayed 2. The request will be passed to next handler, who will be notified by email. Notes: Only the request has been rejected, the button will be available.
Withdraw	To withdraw the requisition request Then, the case will be closed and it can be located at My Handled Case folder. Notes: Only the requestor may withdraw the request. A notification of the withdrawal action will send to requestor and copy to handlers of previous processing task by notification email.
Transfer	To transfer the request to another officer When the button is clicked, Search User window will pop up for selecting an officer to transfer. For details on search user, please refer to the Section 8.2. Notes: Only the current handler may transfer the request to another officer to handler. A notification of the transfer action will send to original handler and assigned handler by notification email.
Approval Form for Issuing Invitation	To generate formal document for seeking approval for issuing invitation of the requisition in Word document format
Print to PDF	To generate details of the request in PDF format

4.2 ISSUE INVITATION TO QUOTATION

4.2.1 Pick / Distribute Requisition Request for Invitation Issuing

If the requisition request is assigned to an Issuing Group for invitation issuing, the requisition request will be available in the Issuing Group Inbox folder.



The screenshot shows a software interface titled 'Issuing Group'. On the left is a navigation sidebar with options: Inbox, My Draft, My Request, My Handled Case, Issuing Group Inbox (which is selected and highlighted in blue), Vetting Group Inbox, and Quotation Box. The main area is a grid titled 'Issuing Group' with columns: Case ID, Subject, Task, Submitted By, Date Sent, Amount, Type, and Request. A single row is selected, showing Case ID 0E314-00060, Subject 'Purchase Notebook with Operating System', Task 'Issue Invitation', Submitted By 'Chan Tai Man', Date Sent '04 Jul 2014 15:57:31', Amount 'HKD \$30,000.00', Type 'SOA', and Request 'REQ'. There are also buttons for 'Batch Pick' and 'Batch Distribute' at the top right of the grid.

(Figure 4-22)

To handle the request, team member of the Issuing Group may tick check box to select the request, and click **Batch Pick** button to move the request to the Inbox folder.

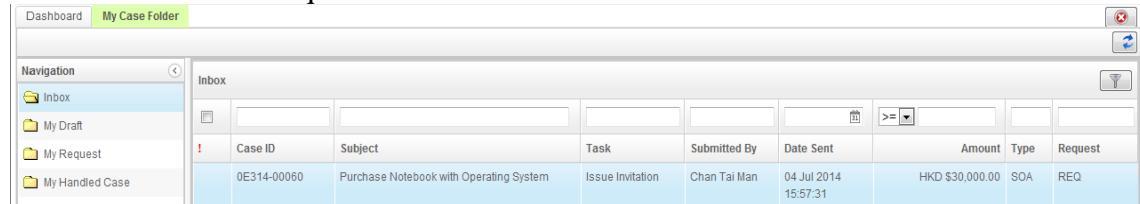
On the other hand, the team member may select the request and click **Batch Distribute** button to assign another officer to handle issuing invitation. Then, the Search User window will pop up for selecting an officer for distribution. For details on search user, please refer to the Section 8.2.

After picked or distributed, a notification will send to the next handler and the handler may locate the request from the Inbox folder.

4.2.2 Issue Invitation to Quotation

The Issuing Officer may locate the request from the Inbox folder. To perform the invitation issuing, please follow the steps below:

1. Double click the request to retrieve the details in the Inbox folder.



The screenshot shows a software interface titled 'Inbox'. On the left is a navigation sidebar with options: Dashboard, My Case Folder (which is selected and highlighted in green), Inbox, My Draft, My Request, My Handled Case, and Issuing Group Inbox. The main area is a grid with columns: Case ID, Subject, Task, Submitted By, Date Sent, Amount, Type, and Request. A single row is selected, showing Case ID 0E314-00060, Subject 'Purchase Notebook with Operating System', Task 'Issue Invitation', Submitted By 'Chan Tai Man', Date Sent '04 Jul 2014 15:57:31', Amount 'HKD \$30,000.00', Type 'SOA', and Request 'REQ'. There are also buttons for 'Dashboard' and 'My Case Folder' at the top right of the grid.

(Figure 4-23)

2. View the Request Summary with cover message and click **Request Details** button to view the details of the requisition request.

The screenshot shows the MYTASK application interface for managing SOA Requisitions. At the top, there is a navigation bar with tabs: 'SOA Requisition' (selected), 'Prepare', 'Vet', and 'Issue'. Below the navigation bar, there is a message box containing a cover letter and a 'Request Details' button.

Subject: Purchase Notebook with Operating System
Requestor: Chan Tai Man

Dear Chan Tai Man ,
A SOA requisition request was ready for issuance. Below please find its summary for your quick reference. Please click the following button to view the details and issue the invitation. If there is quotation document to supplier, please check the corresponding PDF file generated by the system in the Section Quotation Document to Supplier is in order or not.

Request Details

Request Summary

Procurement Type and Amount: SOA (HKD) 30,000.00
Closing Date/Time: 18 Jul 2014 12:00
Assessment: Single-Envelope
Acceptance Criteria: Group

Item Details

Item no.	Group no.	Item Description	Unit	Qty
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00

Supplier Invitation List

The number of supplier invited meets the minimum number required

SOA Category: PC Products - Add-on Software

Supplier Name

- E-Service Testing Company 1
- New Testing 01
- Re-provision SIT Supplier 1
- Test Activate existing

(Figure 4-24)

3. Review and amend the details of the requisition request if necessary. For details on the fields and related buttons of the requisition, please refer to Sections 4.1.1.1 – 4.1.1.8.

The screenshot shows the SOA Requisition application interface. At the top, there are buttons for Save, Issue, Reject, Transfer, Approval Form for Issuing Invitation, Print to PDF, and a help icon. Below this is a navigation bar with tabs: Prepare, Vet, and Issue (highlighted in orange). The main sections are:

- Basic Information:**
 - Subject: Purchase Notebook with Operating System
 - SOA Type: PC SOA - PC Products
 - Acceptance Criteria: Itemised Group Overall
 - Assessment: Single-Envelope Two-Envelope
- Declaration:**

- I declare that there is no conflict of interest in accordance with SPR 185 and 186
- Item Details:**

Item No.	Grp No.	Description	Unit	Qty.
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00

Est. Total Amt. (HKD) 30,000.00
- Supplier Invitation List:**

Please select the category against which the SOA Contractors will be invited for submitting Acquisition Proposal

 - A - Total System Solution
 - B - Add-on Software
 - C - Printers

Does the number of SOA Contractors invited meet the minimum required?

Yes Less than minimum number & justification is given below

1 SOA Contractor	<input type="checkbox"/> Remove from invitation list
Company Name: E-Service Testing Company 1	
Address: TEST	
Chris	Online
<input type="button" value="More Contact"/>	

(Figure 4-25)

The system combined the quotation document(s) into a single PDF file. The Issuing Officer may view the PDF or replace the document if necessary.

Quotation Document to Supplier					
 * Please DO NOT upload internal document in this Part. * Please ensure the document content HAS BEEN ALIGNED with your filled data.					
No	Filename	File Description	Release Source	Created By	
1	Notebook Spec.doc	Purchasing Notebook Spec	<input type="checkbox"/>	Chan Tai Man	  
2		This is Combined Document.	<input type="checkbox"/>	System	 

Proposal Submission Details					
Closing Date/Time	18 Jul 2014		12:00		
Proposal Deposit Location	through e-Procurement System for electronic submission				
Please provide the arrangement in case supplier cannot submit the proposal through the e-Procurement System (e.g. by fax, by mail, by depositing them in a quotation box specified by the department or no other alternatives are provided) 19/F Wu Chung House, Wan Chai, Hong Kong					

Government Contact for Supplier Enquiry				
Name	Post Title	Tel No.	Email	
Chan Tai Man	SM	12345678	tmchan@ogcio.gov.hk	

(Figure 4-26)

Processing History of the request is available at the bottom of the page.

Quotation Opening Team Members				
Name	Post			
Chan Tai Man	SM 			
Add Member				
Processing History and Remarks				
<p>Note - The following officer(s) has/have declared that there is no conflict of interest in accordance with SPR 185 and 186</p>				
Submit Requisition Request - Submit 03 Jul 2014 18:09:54  Chan Tai Man , SM (Tel:)  TM Chan/OGCIO/HKSARG				
Vet Requisition Request - Batch Pick 04 Jul 2014 12:39:06  Chan Tai Man , SM (Tel:)  TM Chan/OGCIO/HKSARG				
Vet Requisition Request - Reject 04 Jul 2014 15:51:35  Chan Tai Man , SM (Tel:)  TM Chan/OGCIO/HKSARG				
Submit Requisition Request - Re-submit 04 Jul 2014 15:54:17  Chan Tai Man , SM (Tel:)  TM Chan/OGCIO/HKSARG				
Vet Requisition Request - Vet 04 Jul 2014 15:55:37  Chan Tai Man , SM (Tel:)  TM Chan/OGCIO/HKSARG				
Issue Invitation - Batch Pick 04 Jul 2014 17:54:12  Chan Tai Man , SM (Tel:)  TM Chan/OGCIO/HKSARG				
Internal Reference				
Urgency [Optional] <input type="checkbox"/>				
File Ref No. [Optional] <input type="text" value="GCIO X/XX"/>				
No	Filename	File Description	Created By	
1	Contractor Invitation.xls	Contractor Invitation List	Chan Tai Man  	<input type="button" value="Upload"/>
You can input remarks for internal reference [Optional] Edit				

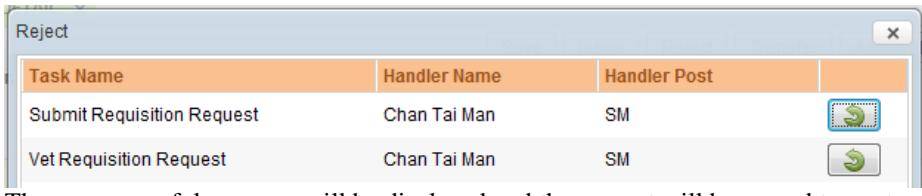
(Figure 4-27)

4. Choose the action button for further processing.

Save	Issue	Reject	Transfer	Approval Form for Issuing Invitation	Print to PDF
----------------------	-----------------------	------------------------	--------------------------	--	------------------------------

(Figure 4-28)

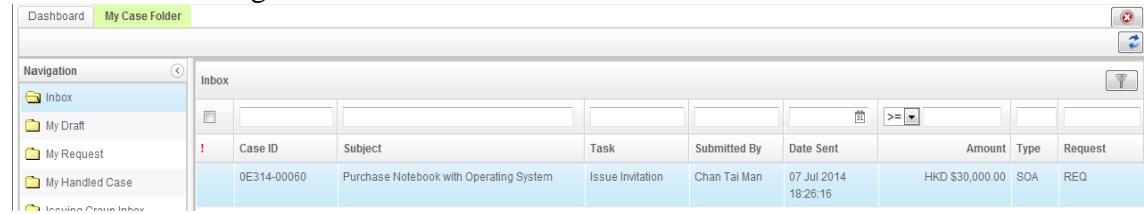
Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed.
Issue	To issue the invitation to quotation to the invited suppliers. The system will perform validation on the user's inputs. If the validation is passed and the issue action is completed successfully, 1. A successful message will be displayed 2. The requestor will be notified by email. 3. The system will issue invitation cover letter to the invited supplier contact person by email and fax. Besides, the system will publish the combined document and requirement details to the external e-Procurement Portal for supplier to download. 4. After the invitation cover letter delivered to suppliers, a notification will send to the Issuing Officer with delivery status by email.
Reject	To reject the requisition request A pop-up window will be displayed to define next handler of the rejected request by clicking  button. The next handler can be the requestor or the previous vetting officer of the request if appropriate,  Then, a successful message will be displayed and the request will be passed to next handler, who will be notified by email.
Transfer	To transfer the request to another officer for invitation issuing. When the button is clicked, Search User window will pop up for selecting an officer to transfer for issuing. For details on search user, please refer to the Section 8.2. A notification of the transfer action will send to original handler and assigned handler by notification email.
Approval Form for Issuing Invitation	To generate formal document for seeking approval for issuing invitation of the requisition in Word document format
Print to PDF	To generate details of the request in PDF format

4.2.3 Re-issue / Complete Invitation Issuing

When the system failed to deliver the invitation cover letter to the invited supplier by fax, the Issuing Officer may re-issue the invitation and must complete the

invitation issuance. The request for issue invitation will be appeared in the Inbox folder of the Issuing Officer.



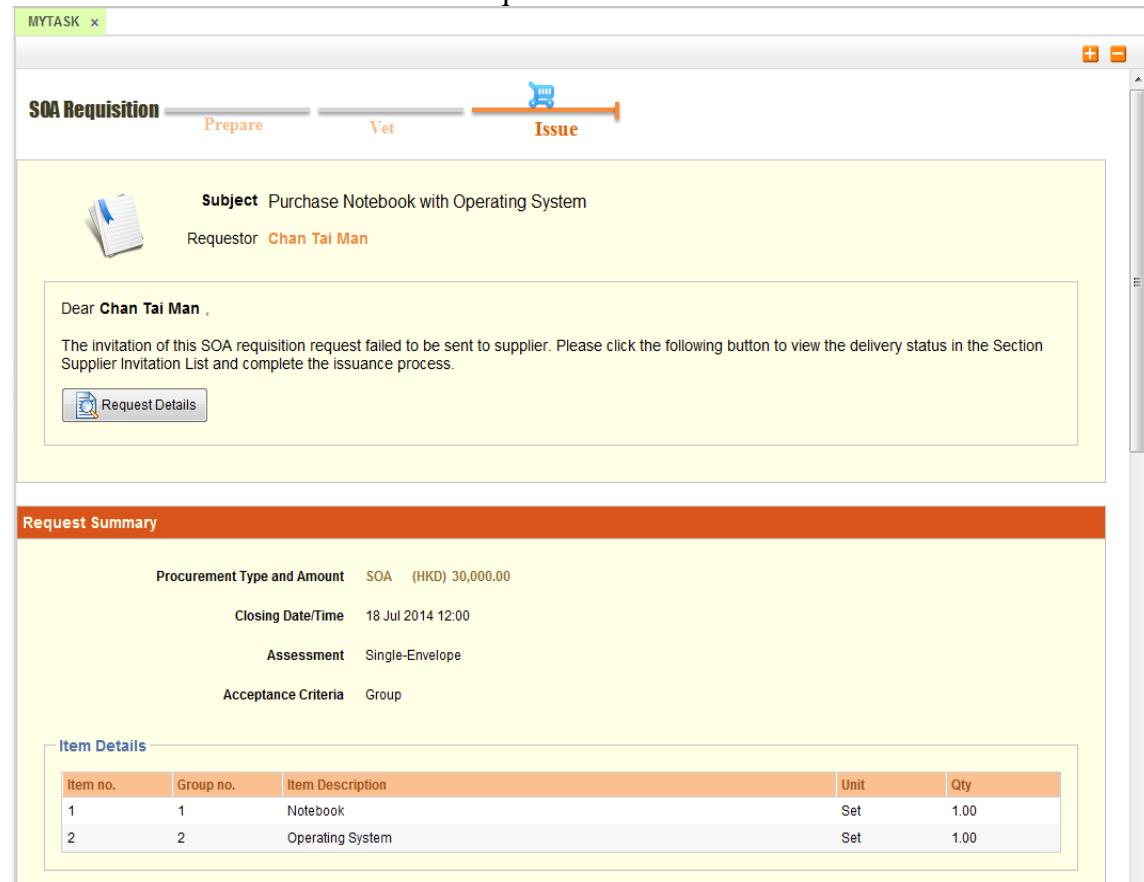
Case ID	Subject	Task	Submitted By	Date Sent	Amount	Type	Request
OE314-00060	Purchase Notebook with Operating System	Issue Invitation	Chan Tai Man	07 Jul 2014 18:26:16	HKD \$30,000.00	SOA	REQ

(Figure 4-29)

Notes: If the invitation issuing process is not complete, the system will not proceed to quotation opening stage.

To re-issue /complete invitation issuing, the Issuing Officer may follow the steps below:

1. Retrieve the request from the Inbox folder by double clicking the request
2. View the Request Summary with cover message and click **Request Details** button to view the details of the requisition



SOA Requisition **Prepare** **Vet** **Issue**

Subject Purchase Notebook with Operating System
Requestor Chan Tai Man

Dear Chan Tai Man ,
The invitation of this SOA requisition request failed to be sent to supplier. Please click the following button to view the delivery status in the Section Supplier Invitation List and complete the issuance process.

[Request Details](#)

Request Summary

Procurement Type and Amount SOA (HKD) 30,000.00
Closing Date/Time 18 Jul 2014 12:00
Assessment Single-Envelope
Acceptance Criteria Group

Item Details

Item no.	Group no.	Item Description	Unit	Qty
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00

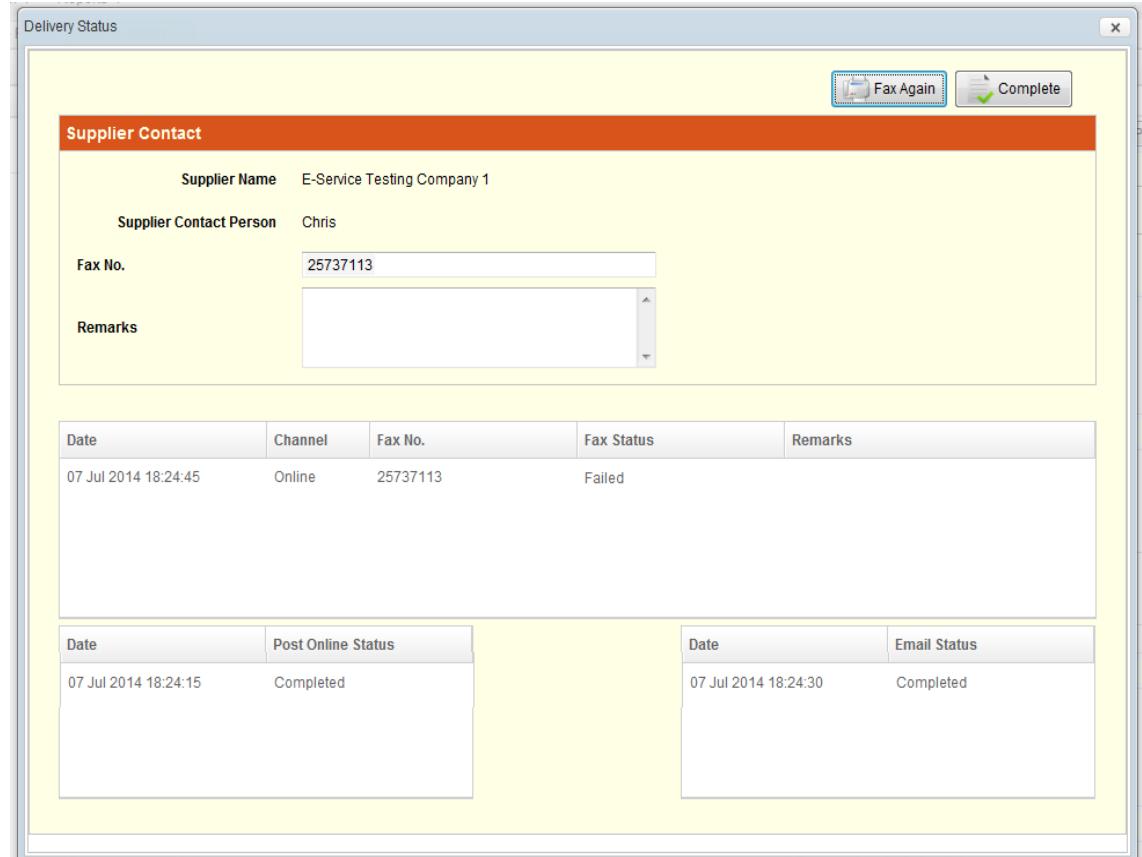
(Figure 4-30)

3. View the delivery status by clicking  button in the Supplier Invitation List section of the Requisition Detail page



(Figure 4-31)

- Delivery Status window with **Failed** status showed. Click **Fax Again** button to re-fax the invitation to quotation to supplier. Then, the delivery information will be showed.



(Figure 4-32)

Alternatively, the invitation to quotation may be delivered to supplier outside the system.

Click **Complete** button to complete and close the delivery status window and return to the Requisition Detail page.

- Click **Complete Issuance** button in the Requisition Detail page to complete the issuing process.

Complete Issuance **Approval Form for Issuing Invitation** **Print to PDF**

(Figure 4-33)

Button Description

Button	Button Description
Complete Issuance	The system prompts user to confirm whether the issuance of invitation is completed or not. A successful message will be displayed if the issuance is completed.
Approval Form for Issuing Invitation	To generate formal document for seeking approval for issuing invitation of the requisition in Word document format
Print to PDF	To generate details of the request in PDF format

4.3 ADDENDUM

4.3.1 Prepare and Submit Addendum

After the invitation to quotation issued, the handler is allowed to raise an addendum at least 48 hours before the submission closing date/time. To raise an addendum, please follow the steps below:

1. Double click the case to retrieve the case in the My Handled Case folder

Case ID	Subject	Type	Case Handled On	Created By	Case Owned By	By Others
0E314-00060	Purchase Notebook with Operating System	SOA	07 Jul 2014 18:24:04	Chan Tai Man	SM	

(Figure 4-34)

2. View the Requisition Summary and click **Create Addendum** button to raise an addendum for the case.

Rev No.	Created By	Created Date	Status
FirstIssue	Chan Tai Man	03 Jul 2014 12:34:19	Issued

(Figure 4-35)

3. SOA Addendum page in Prepare stage displays. The handler may modify / provide the further information of the requisition.

Notes: Some of requisition information cannot be changed, e.g. Subject, SOA Type, Assessment, Supplier Invitation List (except Contact Information), etc.

For details on the fields and related buttons of the requisition, please refer to Sections 4.1.1.1 – 4.1.1.8.

USER MANUAL OF IT SOA FUNCTION

REQ_SUMMARY x SOA Addendum (A003) x

Save Submit Print to PDF + -

SOA Addendum **Prepare**

Basic Information

Subject: Purchase Notebook with Operating System
 SOA Type: PC SOA - PC Products
 Acceptance Criteria: Itemised Group Overall
 Assessment: Single-Envelope Two-Envelope [Marking Scheme](#)

Declaration
- I declare that there is no conflict of interest in accordance with SPR 185 and 186

Item Details

Item No.	Grp No.	Description	Unit	Qty.	
1	1	Notebook	Set	1.00	
2	2	Operating System	Set	1.00	

[Add Item](#)

Est. Total Amt. (HKD)

Supplier Invitation List

Please select the category against which the SOA Contractors will be invited for submitting Acquisition Proposal

A - Total System Solution
<input checked="" type="checkbox"/> B - Add-on Software
C - Printers

Does the number of SOA Contractors invited meet the minimum required?
 Yes Less than minimum number & justification is given below

1 SOA Contractor Remove from invitation list

Company Name: E-Service Testing Company 1
 Address: TEST

Chris
 Online

(Figure 4-36)

The Addendum Document to Supplier must be provided.

The screenshot shows a software interface titled 'Addendum Document to Supplier'. At the top, there are two red warning messages: 'Please DO NOT upload internal document in this Part.' and 'Please ensure the document content HAS BEEN ALIGNED with your filled data.' Below this is a table with one row. The columns are labeled 'No', 'Filename', 'File Description', 'Release Source', and 'Created By'. The first row contains the value '1' in the 'No' column, 'Notebook Spec-Addendum.doc' in the 'Filename' column, 'Addendum' in the 'File Description' column, an empty 'Release Source' column, and 'Chan Tai Man' in the 'Created By' column. There are also icons for moving rows up and down, deleting, and searching. A button labeled 'Upload' is located at the bottom left of the table.

(Figure 4-37)

Data Field Description

Field Name	Field Description	
File Name	Display the name of file uploaded to the system	Mandatory
File Description	Description of the uploaded file If the file is uploaded, the file description is mandatory to input.	Mandatory
Release Source	Release the original source of document in external e-Procurement Portal for supplier download The system will combine all uploaded addendum document(s) in the order of sequence number into a single PDF file for supplier download.	Optional

Button Description

Button	Button Description
	To move the selected item up or down to change the order
Upload	To browse and upload file. Notes: 1. The file should be in Word, Excel, PDF, or Plain Text format. 2. The maximum file size of each uploaded document is 5 MB.
	To view the original source of uploaded file
	To view the combined document
	To remove the uploaded file
	To replace the document

Proposal Submission Details

Closing Date/Time: 18 Jul 2014 12:00

Proposal Deposit Location: through e-Procurement System for electronic submission

Please provide the arrangement in case supplier cannot submit the proposal through the e-Procurement System (e.g. by fax, by mail, by depositing them in a quotation box specified by the department or no other alternatives are provided)

19/F Wu Chung House, Wan Chai, Hong Kong

Government Contact for Supplier Enquiry

Name	Post Title	Tel No.	Email
Chan Tai Man	SM		tmchan@ogcio.gov.hk

[More Contact](#)

Quotation Opening Team Members

Name	Post
Chan Tai Man	SM

[Add Member](#)

(Figure 4-38)

The Processing Path must be provided. The information will be auto-assigned according to Default Processing Officer for Create IT-SOA Addendum (IT-SOA) Function under User Preference if any. For details on Default Processing Officer, please refer to Section 5.2.

Notes: When the addendum request is submitted, it will go through the following processes:

Submit Addendum → Vet Addendum (Optional) → Issue Addendum

Processing Path

Task Name	Mandatory	Officer Name	Post Title
Submit Addendum Request	Yes	Chan Tai Man	SM
Vet Addendum Request	Add Officer (Max 2)	Vetting Group	Group
Issue Addendum	Yes	Issuing Group	Group

(Figure 4-39)

Data Field Description

Field Name	Field Description	
Mandatory / Officer Name / Post Title (Submit Addendum Request)	Mandatory: ‘Yes’ (the task is necessary) The officer submits the addendum request.	Non-Editable

Field Name	Field Description	
Mandatory / Officer Name / Post Title (Vet Addendum Request)	Mandatory: ‘No’ (the task is not necessary) The individual officer or vetting group vets the addendum request. At most 2 vetting officers or groups are assigned for vetting the addendum.	Non-Editable / Optional
Mandatory / Officer Name / Post Title (Issue Addendum)	Mandatory: ‘Yes’ (the task is necessary) The individual officer or issuing group issues the addendum to suppliers.	Non-Editable / Mandatory

Button Description

Button	Button Description
<u>Add officer</u>	To add one more officer for Vet Addendum Request task When the link is clicked, a new row will be inserted.
	To search officer / group and assign to process the task When the button is clicked, Search User / User Group window pops up. After an officer / a user group searched and selected, the details of information show in the table. For details on search user, please refer to the Section 8.2.
	To remove the corresponding officer / group from the processing task list.



The screenshot shows a form titled "Internal Reference". It includes fields for "Urgency [Optional]" (with a checkbox), "File Ref No. [Optional]" (containing "GCIO X/XX"), and a file upload section with a table header ("No", "Filename", "File Description", "Created By") and a note "No files.". Below the table is an "Upload" button. At the bottom, there is a note "You can input remarks for internal reference [Optional]" with an "Edit" link.

(Figure 4-40)

4. Choose the action button for further processing.



(Figure 4-41)

Button Description

Button	Button Description
Save	<p>To save the information inputted</p> <p>If the request is not copied from the latest version (i.e. another person has submitted another request), an alert message will be displayed.</p> <p>After saved, a successful message will be displayed. The request can be found in requestor's My Draft folder.</p>
Submit	<p>To submit the addendum request</p> <p>If the request is not copied from the latest version (i.e. another person has submitted another request), an alert message will be displayed.</p> <p>The system will perform validation on the user's inputs.</p> <p>If the validation is passed and the submit action is completed successfully,</p> <ol style="list-style-type: none"> 1. A successful message will be displayed 2. If there is no Vet Addendum Request task, the system will render addendum document and combine the document in a single PDF format. This step will take a few minutes to process. 3. The request will be passed to next handler, who will be notified by email. <p>If Vet Addendum Request task is required and the requestor is also the next handler, the system will ask whether the requestor continue the vetting task immediately or not.</p>
Print to PDF	To generate details of the request in PDF format

4.3.2 Vet Addendum

If the addendum request requires vetting by a Vetting Group, please make reference to Section 4.1.2 for Pick / Distribute Requisition Request for Vetting.

The Vetting Officer may locate the addendum request from the Inbox folder. To perform the vetting, please follow the steps below:

1. Double click the addendum request to retrieve the details in the Inbox folder.

Case ID	Subject	Task	Submitted By	Date Sent	Amount	Type	Request
0E314-00060	Purchase Notebook with Operating System	Vet Addendum Request	Chan Tai Man	08 Jul 2014 11:56:18	HKD \$30,000.00	SOA	ADD

(Figure 4-42)

2. View the Addendum Request Summary with cover message and click **Request Details** button to view the details of the addendum request.

The screenshot displays the SOA Addendum interface with the following sections:

- SOA Addendum** process flow: Prepare (orange), Vet (blue), Issue (grey).
- Request Details** section:
 - Subject:** Purchase Notebook with Operating System
 - Requestor:** Chan Tai Man
 - Message: Dear Chan Tai Man, A SOA addendum request was submitted for your review please. Below please find its summary for your quick reference. Please click the following button to review the details. You can leave remarks and upload documents at the bottom of this page for internal reference.
 - Request Details** button (highlighted with a blue border).
- Request Summary** section:
 - Procurement Type and Amount: SOA (HKD) 30,000.00
 - Closing Date/Time: 18 Jul 2014 12:00
 - Assessment: Single-Envelope
 - Acceptance Criteria: Group
- Item Details** section:

Item no.	Group no.	Item Description	Unit	Qty
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00
- Supplier Invitation List** section:
 - The number of supplier invited meets the minimum number required
 - SOA Category: PC Products - Add-on Software
 - Supplier Name** table:

Supplier Name
E-Service Testing Company 1
New Testing 01
Re-provision SIT Supplier 1
Test Activate existing

(Figure 4-43)

3. Review and amend the details of addendum request if necessary. For details on data fields and buttons, please refer to Section 4.3.1.

The screenshot shows the SOA Addendum application interface. At the top, there are buttons for Save, Vet, Reject, Transfer, Print to PDF, and two icons. Below this is a navigation bar with tabs: SOA Addendum (selected), Prepare, Vet (highlighted in orange), and Issue. The main content area is divided into sections:

- Basic Information:** Subject: Purchase Notebook with Operating System; SOA Type: PC SOA - PC Products; Acceptance Criteria: Itemised (radio button selected); Assessment: Single-Envelope (radio button selected); Marking Scheme button.
- Declaration:** A checkbox stating "I declare that there is no conflict of interest in accordance with SPR 185 and 186".
- Item Details:** A table showing two items:

Item No.	Grp No.	Description	Unit	Qty.
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00

 An "Add Item" link is below the table. To the right, an "Est. Total Amt. (HKD)" field contains "30,000.00".
- Supplier Invitation List:** A section asking to select the category against which SOA Contractors will be invited. Options A (Total System Solution) and B (Add-on Software) are listed, with B selected. Option C (Printers) is also available. Below this, a question asks if the number of contractors invited meets the minimum required, with "Yes" selected.
- SOA Contractor:** A detailed view of one contractor:

1 SOA Contractor	<input type="checkbox"/> Remove from invitation list
Company Name	E-Service Testing Company 1
Address	TEST
Chris	<input type="checkbox"/> Online
25737113	

(Figure 4-44)

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Addendum Document to Supplier

* Please DO NOT upload internal document in this Part.
* Please ensure the document content HAS BEEN ALIGNED with your filled data.

No	Filename	File Description	Release Source	Created By	
1	Notebook Spec - Addendum.doc	Addendum		Chan Tai Man	

Proposal Submission Details

Closing Date/Time: 18 Jul 2014 12:00

Proposal Deposit Location: through e-Procurement System for electronic submission

Please provide the arrangement in case supplier cannot submit the proposal through the e-Procurement System (e.g. by fax, by mail, by depositing them in a quotation box specified by the department or no other alternatives are provided)
19/F Wu Chung House, Wan Chai, Hong Kong

Government Contact for Supplier Enquiry

Name	Post Title	Tel No.	Email
Chan Tai Man	SM	12345678	tmchan@ogcio.gov.hk

[More Contact](#)

Quotation Opening Team Members

Name	Post
Chan Tai Man	SM

[Add Member](#)

(Figure 4-45)

Processing History of the request is available at the bottom of the page.

Processing History and Remarks

Note
- The following officer(s) has/have declared that there is no conflict of interest in accordance with SPR 185 and 186

Submit Addendum Request - Submit	08 Jul 2014 11:56:18
Chan Tai Man , SM (Tel:) TM Chan/OGCIO/HKSARG	
Vet Addendum Request - Batch Pick	08 Jul 2014 11:56:59
Chan Tai Man , SM (Tel:) TM Chan/OGCIO/HKSARG	

Processing Path

Task Name	Mandatory	Officer Name	Post Title
Vet Addendum Request	Add Officer (Max 2)	Chan Tai Man	SM
Issue Addendum	Yes	Issuing Group	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Internal Reference

Urgency [Optional]	<input type="checkbox"/>		
File Ref No. [Optional]	GCIO XXX		
No	Filename	File Description	Created By
<input type="button" value="Upload"/>			
You can input remarks for internal reference [Optional] Edit			

(Figure 4-46)

4. Choose the action button for further processing.



(Figure 4-47)

Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed.
Vet	To complete the vetting process The system will perform validation on the user's inputs. If the validation is passed and the vet action is completed successfully, 1. A successful message will be displayed 2. If there is no further Vet Addendum Request task, the system will render addendum document and combine the document in a single PDF format. This step will take a few minutes to process. 3. The request will be passed to next handler, who will be notified by email.

Button	Button Description
Reject	To reject the addendum request A pop-up window will be displayed to define next handler of the rejected request by clicking  button. The next handler can be the addendum requestor or the previous vetting officer of the addendum request if appropriate, Then, a successful message will be displayed and the request will be passed to next handler, who will be notified by email.
Transfer	To transfer the addendum request to another officer for vetting When the button is clicked, Search User window will pop up for selecting an officer to transfer for vetting. For details on search user, please refer to the Section 8.2. A notification of the transfer action will send to original handler and assigned handler by notification email.
Print to PDF	To generate details of the request in PDF format

4.3.3 Re-submit / withdraw / transfer Addendum Request

To re-submit / withdraw / transfer the addendum request, the handler may follow the steps below:

1. Retrieve the addendum request from the Inbox folder for re-submit/transfer or from My Request folder for withdrawal by double clicking the request
2. View the Addendum Request Summary with cover message and click **Request Details** button to view the details of addendum request
3. Review and amend the details of the addendum request
4. Choose the action button for further processing.



(Figure 4-48)

Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed. Notes: Only the request has been rejected, the button will be available.

Button	Button Description
Re-submit	To submit the addendum request The system will perform validation on the user's inputs. If the validation is passed and the re-submit action is completed successfully, 1. A successful message will be displayed 2. The request will be passed to next handler, who will be notified by email. Notes: Only the request has been rejected, the button will be available.
Withdraw	To withdraw the addendum request Then, the case will be closed and it can be located at My Handled Case folder. Notes: Only the requestor may withdraw the request. A notification of the withdrawal action will send to requestor and copy to handlers of previous processing task by notification email.
Transfer	To transfer the request to another officer When the button is clicked, Search User window will pop up for selecting an officer to transfer. For details on search user, please refer to the Section 8.2. Notes: Only the current handler may transfer the request to another officer to handler. A notification of the transfer action will send to original handler and assigned handler by notification email.
Print to PDF	To generate details of the request in PDF format

4.3.4 Issue / Re-Issue Addendum

If the addendum request is assigned to Issuing Group for issuing addendum, please make reference to Section 4.2.1 for Pick / Distribute Requisition Request for Invitation Issuing.

The Issuing Officer may locate the request from the Inbox folder. To perform the addendum issuing, please follow the steps below:

1. Double click the addendum request to retrieve the details in the Inbox folder

Case ID	Subject	Task	Submitted By	Date Sent	Amount	Type	Request
0E314-00060	Purchase Notebook with Operating System	Issue Addendum	Chan Tai Man	08 Jul 2014 12:37:32	HKD \$30,000.00	SOA	ADD

(Figure 4-49)

2. View the Addendum Request Summary with cover message and click **Request Details** button to view the details of addendum request.

The screenshot displays the SOA Addendum process flow and its associated details:

- SOA Addendum Process Flow:** A horizontal bar at the top shows three stages: **Prepare**, **Vet**, and **Issue**. The **Issue** stage is highlighted with an orange background and a blue gear icon.
- Request Details Page:** This section contains the following information:
 - Subject:** Purchase Notebook with Operating System
 - Requestor:** Chan Tai Man
 - A message to the requestor: "Dear Chan Tai Man, A SOA addendum request was ready for issuance. Below please find its summary for your quick reference. Please click the following button to view the details and issue the addendum. If there is addendum document to supplier, please check the corresponding PDF file generated by the system in the Section Addendum Document to Supplier is in order or not."
 - A **Request Details** button with a magnifying glass icon.
- Request Summary:** This section provides a summary of the procurement details:

Procurement Type and Amount	SOA (HKD) 30,000.00
Closing Date/Time	18 Jul 2014 12:00
Assessment	Single-Envelope
Acceptance Criteria	Group
- Item Details:** A table showing the items being procured:

Item no.	Group no.	Item Description	Unit	Qty
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00
- Supplier Invitation List:** This section lists the suppliers invited:

Supplier Name
E-Service Testing Company 1
New Testing 01
Re-provision SIT Supplier 1
Test Activate existing

(Figure 4-50)

3. Review and amend the details of the addendum request if necessary. For details on data fields and buttons, please refer to Section 4.3.1.

The screenshot shows the SOA Addendum application interface. At the top, there is a navigation bar with buttons for Save, Issue, Reject, Transfer, Print to PDF, and a plus sign. Below the navigation bar, a progress bar indicates the current step is 'Issue'. The main sections include:

- Basic Information:** Subject: Purchase Notebook with Operating System; SOA Type: PC SOA - PC Products; Acceptance Criteria: Group (selected); Assessment: Single-Envelope (selected); Marking Scheme button.
- Declaration:** A declaration statement: "I declare that there is no conflict of interest in accordance with SPR 185 and 186".
- Item Details:** A table showing two items:

Item No.	Grp No.	Description	Unit	Qty.
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00

 Estimated Total Amount: HKD 30,000.00
- Supplier Invitation List:** A section asking to select categories for contractors. Options A (Total System Solution) and B (Add-on Software) are listed, with B selected. C (Printers) is also listed. A question follows: "Does the number of SOA Contractors invited meet the minimum required?". Options: Yes (radio button selected) and Less than minimum number & justification is given below.
- SOA Contractor:** A detailed view of one contractor:

1	SOA Contractor	<input type="checkbox"/> Remove from invitation list
Company Name: E-Service Testing Company 1		
Address: TEST		
Chris <input type="text"/> 25737113		<input type="checkbox"/> Online

(Figure 4-51)

The system combined the addendum document(s) into a single PDF file. The Issuing Officer may view the PDF or replace the document if necessary.

Addendum Document to Supplier					
 * Please DO NOT upload internal document in this Part. * Please ensure the document content HAS BEEN ALIGNED with your filled data.					
No	Filename	File Description	Release Source	Created By	
1	Notebook Spec - Addendum.doc	Addendum	<input type="checkbox"/>	Chan Tai Man	  
2		This is Combined Document.	<input type="checkbox"/>	System	 

Proposal Submission Details					
Closing Date/Time	18 Jul 2014		12:00		
Proposal Deposit Location	through e-Procurement System for electronic submission				
Please provide the arrangement in case supplier cannot submit the proposal through the e-Procurement System (e.g. by fax, by mail, by depositing them in a quotation box specified by the department or no other alternatives are provided) 19/F Wu Chung House, Wan Chai, Hong Kong					

Government Contact for Supplier Enquiry					
Name	Post Title	Tel No.	Email		
Chan Tai Man	SM	12345678	tmchan@ogcio.gov.hk		

Quotation Opening Team Members					
Name	Post				
Chan Tai Man	SM				
Add Member					

(Figure 4-52)

Processing History of the request is available at the bottom of the page.

Processing History and Remarks	
Note - The following officer(s) has/have declared that there is no conflict of interest in accordance with SPR 185 and 186	
Submit Addendum Request - Submit	08 Jul 2014 11:56:18
Chan Tai Man , SM (Tel:)	TM Chan/OGCIO/HKSARG
Vet Addendum Request - Batch Pick	08 Jul 2014 11:56:59
Chan Tai Man , SM (Tel:)	TM Chan/OGCIO/HKSARG
Vet Addendum Request - Vet	08 Jul 2014 12:36:12
Chan Tai Man , SM (Tel:)	TM Chan/OGCIO/HKSARG
Issue Addendum - Batch Pick	08 Jul 2014 12:41:06
Chan Tai Man , SM (Tel:)	TM Chan/OGCIO/HKSARG

Internal Reference			
Urgency [Optional]	<input type="checkbox"/>		
File Ref No. [Optional]	GCIO XXX		
No	Filename	File Description	Created By
<input type="button" value="Upload"/> You can input remarks for internal reference [Optional] Edit			

(Figure 4-53)

4. Choose the action button for further processing.



(Figure 4-54)

Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed.
Issue	To issue the addendum to the invited suppliers. The system will perform validation on the user's inputs. If the validation is passed and the issue action is completed successfully, 1. A successful message will be displayed. 2. The requestor will be notified by email. 3. The system will issue notification to the invited supplier contact person by email and fax. Besides, the system will publish the combined document and details to the external e-Procurement Portal for supplier to download. 4. After the notification delivered to suppliers, a notification will send to the Issuing Officer with delivery status by email.

Button	Button Description
Reject	<p>To reject the request</p> <p>A pop-up window will be displayed to define next handler of the rejected request by clicking  button. The next handler can be the requestor or the previous vetting officer of the request if appropriate,</p> <p>Then, a successful message will be displayed and the request will be passed to next handler, who will be notified by email.</p>
Transfer	<p>To transfer the request to another officer for issuing addendum.</p> <p>When the button is clicked, Search User window will pop up for selecting an officer to transfer for issuing. For details on search user, please refer to the Section 8.2.</p> <p>A notification of the transfer action will send to original handler and assigned handler by notification email.</p>
Print to PDF	To generate details of the request in PDF format

When the system failed to deliver the notification to the invited supplier by fax, the Issuing Officer may re-issue the addendum notification and must complete the issuance. The addendum request for issuing will be appeared in the Inbox folder of the Issuing Officer. For details, please make reference to Section 4.2.3 Re-issue/Complete Invitation Issuing, which steps are similar.

Notes: If the addendum issuing process is not complete, the system will not proceed to quotation opening stage.

4.4 CANCELLATION OF INVITATION

4.4.1 Prepare Cancellation of Invitation

After the invitation to quotation is issued, the handler is allowed to raise a cancellation of invitation at least 48 hours before the submission closing date/time. To raise a cancellation of invitation, please follow the steps below:

1. Double click the case to retrieve the case in the My Handled Case folder

Case ID	Subject	Type	Case Handled On	Created By	Case Owned By	By Others
0E314-00060	Purchase Notebook with Operating System	SOA	08 Jul 2014 15:15:14	Chan Tai Man	SM	

(Figure 4-55)

2. View the Requisition Summary, and click **Cancel Invitation** button to raise a cancellation of invitation.

Rev No.	Created By	Created Date	Status	Action
First Issue	Chan Tai Man	03 Jul 2014 12:34:19	Issued	<button>View</button>
Addendum 1	Chan Tai Man	08 Jul 2014 11:56:17	Issued	<button>View</button>

(Figure 4-56)

3. SOA Cancellation of Invitation page in Prepare stage displays. The handler may modify / provide the information for cancellation.

Notes: Most of requisition information cannot be changed. Only a few areas are allowed to modify, e.g. Supplier Contact Information, Government Contact for Supplier Enquiry, Internal Reference, etc.

For details on the fields and related buttons of the requisition, please refer to Sections 4.1.1.1 – 4.1.1.8.

USER MANUAL OF IT SOA FUNCTION

REQ_SUMMARY x SOA Cancellation (C003) x

Save Submit Print to PDF +

SOA Cancellation of Invitation   

Basic Information

Subject: Purchase Notebook with Operating System
 SOA Type: PC SOA - PC Products
 Acceptance Criteria: Itemised Group Overall
 Assessment: Single-Envelope Two-Envelope

Declaration
- I declare that there is no conflict of interest in accordance with SPR 185 and 186

Item Details

Item No.	Grp No.	Description	Unit	Qty.
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00

Est. Total Amt. (HKD) 30,000.00

Supplier Invitation List

Please select the category against which the SOA Contractors will be invited for submitting Acquisition Proposal

A - Total System Solution
 B - Add-on Software
 C - Printers

Does the number of SOA Contractors invited meet the minimum required?
 Yes Less than minimum number & justification is given below

1 SOA Contractor Remove from invitation list

Company Name: E-Service Testing Company 1
 Address: TEST

 Chris
  

(Figure 4-57)

Proposal Submission Details														
Closing Date/Time	18 Jul 2014 12:00													
Proposal Deposit Location	through e-Procurement System for electronic submission													
Please provide the arrangement in case supplier cannot submit the proposal through the e-Procurement System (e.g. by fax, by mail, by depositing them in a quotation box specified by the department or no other alternatives are provided)														
19/F Wu Chung House, Wan Chai, Hong Kong														
Government Contact for Supplier Enquiry <table border="1" style="width: 100%;"> <tr> <th>Name</th> <th>Post Title</th> <th>Tel No.</th> <th>Email</th> <th></th> </tr> <tr> <td>Chan Tai Man</td> <td>SM</td> <td><input type="text"/></td> <td>tmchan@ogcio.gov.hk</td> <td></td> </tr> </table> More Contact					Name	Post Title	Tel No.	Email		Chan Tai Man	SM	<input type="text"/>	tmchan@ogcio.gov.hk	
Name	Post Title	Tel No.	Email											
Chan Tai Man	SM	<input type="text"/>	tmchan@ogcio.gov.hk											

(Figure 4-58)

The Processing Path must be provided. The information will be auto-assigned according to Default Processing Officer for Create IT-SOA Cancellation of Invitation (IT-SOA) Function under User Preference if any. For details on Default Processing Officer, please refer to Section 5.2.

Notes: When the cancellation request is submitted, it will go through the following processes:

Submit Cancellation of Invitation → Vet Cancellation of Invitation (Optional) → Issue Cancellation of Invitation

Processing Path				
Task Name	Mandatory	Officer Name	Post Title	
Submit Cancellation of Invitation Request	Yes	Chan Tai Man	SM	
Vet Cancellation of Invitation Request	Add Officer (Max 2)	Vetting Group	Group	
Issue Cancellation of Invitation	Yes	Issuing Group	Group	

(Figure 4-59)

Data Field Description

Field Name	Field Description	
Mandatory / Officer Name / Post Title (Submit Cancellation of Invitation Request)	Mandatory: ‘Yes’ (the task is necessary) The officer submits the cancellation request.	Non-Editable
Mandatory / Officer Name / Post Title (Vet Cancellation of Invitation Request)	Mandatory: ‘No’ (the task is not necessary) The individual officer or vetting group vets the cancellation request. At most 2 vetting officers or groups are assigned for vetting the cancellation request.	Non-Editable / Optional

Field Name	Field Description	
Mandatory / Officer Name / Post Title (Issue Cancellation of Invitation)	Mandatory: ‘Yes’ (the task is necessary) The individual officer or issuing group issues the cancellation of invitation to suppliers.	Non-Editable / Mandatory

Button Description

Button	Button Description
<u>Add officer</u>	To add one more officer for Vet Cancellation of Invitation Request task When the link is clicked, a new row will be inserted.
	To search officer / group and assign to process the task When the button is clicked, Search User / User Group window pops up. After an officer / a user group searched and selected, the details of information show in the table. For details on search user, please refer to the Section 8.2.
	Remove officer / group from the processing task list

Internal Reference

Urgency [Optional]

File Ref No. [Optional] GCIO X/XX

No	Filename	File Description	Created By
No files.			
<input type="button" value="Upload"/>			

You can input remarks for internal reference [Optional]

(Figure 4-60)

4. Choose the action button for further processing.



(Figure 4-61)

Button Description

Button	Button Description
Save	To save the information inputted If the request is not copied from the latest version (i.e. another person has submitted another request), an alert message will be displayed. After saved, a successful message will be displayed. The request can be found in requestor’s My Draft folder.

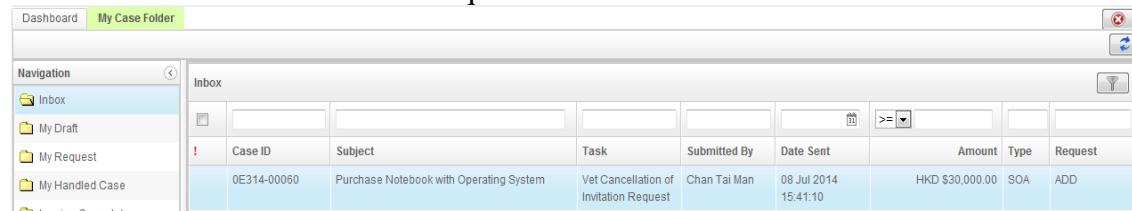
Submit	To submit the cancellation request If the request is not copied from the latest version (i.e. another person has submitted another request), an alert message will be displayed. The system will perform validation on the user's inputs. If the validation is passed and submit action is completed successfully, 1. A successful message will be displayed 2. The request will be passed to next handler, who will be notified by email. If Vet Cancellation of Invitation Request task is required and the requestor is also the next handler, the system will ask whether the requestor continue the vetting task immediately or not.
Print to PDF	To generate details of the request in PDF format

4.4.2 Vet Cancellation of Invitation

If the cancellation request requires vetting by Vetting Group, please make reference to Section 4.1.2 for Pick / Distribute Requisition Request for Vetting.

The Vetting Officer may locate the cancellation request from the Inbox folder. To perform the vetting, please follow the steps below:

1. Double click the cancellation request to retrieve the details in the Inbox folder



(Figure 4-62)

2. View the Cancellation Request Summary with cover message and click **Request Details** button to view the details of the cancellation of invitation request.



SOA Cancellation of Invitation

Subject: Purchase Notebook with Operating System
Requestor: Chan Tai Man

Dear Chan Tai Man ,
A cancellation of invitation request under SOA was submitted for your review please. Below please find its summary for your quick reference. Please click the following button to review the details. You can leave remarks and upload documents at the bottom of this page for internal reference.

[Request Details](#)

Request Summary

Procurement Type and Amount	SOA (HKD) 30,000.00
Closing Date/Time	18 Jul 2014 12:00
Assessment	Single-Envelope
Acceptance Criteria	Group

Item Details

Item no.	Group no.	Item Description	Unit	Qty
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00

Supplier Invitation List

The number of supplier invited meets the minimum number required

SOA Category	PC Products - Add-on Software
Supplier Name	E-Service Testing Company New Testing 01 Re-provision SIT Supplier 1 Test Activate existing

(Figure 4-63)

3. Review and amend the details of cancellation request if necessary. For details on data fields and buttons, please refer to Section 4.4.1.

The screenshot displays the 'SOA Cancellation of Invitation' application. At the top, there is a navigation bar with buttons for Save, Vet, Reject, Transfer, Print to PDF, and two icons. Below the navigation bar is a progress bar showing 'Prepare' (orange), 'Vet' (blue), and 'Issue' (grey). The main area is divided into sections:

- Basic Information:** Includes fields for Subject (Purchase Notebook with Operating System), SOA Type (PC SOA - PC Products), Acceptance Criteria (Itemised, Group, Overall), and Assessment (Single-Envelope, Two-Envelope, Marking Scheme).
- Declaration:** A statement: "I declare that there is no conflict of interest in accordance with SPR 185 and 186".
- Item Details:** A table showing items:

Item No.	Grp No.	Description	Unit	Qty.
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00

 An estimated total amount of HKD 30,000.00 is displayed at the bottom of the table.
- Supplier Invitation List:** A section asking to select categories for contractors. Options include:
 - A - Total System Solution
 - B - Add-on Software
 - C - Printers
 A question follows: "Does the number of SOA Contractors invited meet the minimum required?". Options are:
 - Yes
 - Less than minimum number & justification is given below
 A detailed view of a selected contractor is shown:

1	SOA Contractor	<input type="checkbox"/> Remove from invitation list
Company Name: E-Service Testing Company 1		
Address: TEST		
Chris <input type="text"/> 25737113		<input type="checkbox"/> Online

(Figure 4-64)

USER MANUAL OF IT SOA FUNCTION

Proposal Submission Details

Closing Date/Time: 18 Jul 2014 12:00

Proposal Deposit Location: through e-Procurement System for electronic submission

Please provide the arrangement in case supplier cannot submit the proposal through the e-Procurement System (e.g. by fax, by mail, by depositing them in a quotation box specified by the department or no other alternatives are provided)

19/F Wu Chung House, Wan Chai, Hong Kong

Government Contact for Supplier Enquiry

Name	Post Title	Tel No.	Email
Chan Tai Man	SM	12345678	tmchan@ogcio.gov.hk

[More Contact](#)

(Figure 4-65)

Processing History of the request is available at the bottom of the page.

Processing History and Remarks

Note

- The following officer(s) has/have declared that there is no conflict of interest in accordance with SPR 185 and 186

Submit Cancellation of Invitation Request - Submit	08 Jul 2014 15:41:10
Chan Tai Man, SM (Tel:) TM Chan/OGCIO/HKSARG	
Vet Cancellation of Invitation Request - Batch Pick	08 Jul 2014 15:41:27
Chan Tai Man, SM (Tel:) TM Chan/OGCIO/HKSARG	

Processing Path

Task Name	Mandatory	Officer Name	Post Title
Vet Cancellation of Invitation Request	Add Officer (Max 2)	Chan Tai Man	SM
Issue Cancellation of Invitation	Yes	Issuing Group	

Internal Reference

Urgency [Optional]

File Ref No. [Optional] GCIO XXX

No	Filename	File Description	Created By
No files.			

Upload

You can input remarks for internal reference [Optional] [Edit](#)

(Figure 4-66)

4. Choose the action button for further processing.

[Save](#) [Vet](#) [Reject](#) [Transfer](#) [Print to PDF](#)

(Figure 4-67)

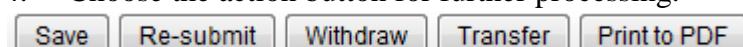
Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed.
Vet	To complete the vetting process The system will perform validation on the user's inputs. If the validation is passed and the vet action is completed successfully, 1. A successful message will be displayed 2. The request will be passed to next handler, who will be notified by email.
Reject	To reject the cancellation request A pop-up window will be displayed to define next handler of the rejected request by clicking  button. The next handler can be the cancellation requestor or the previous vetting officer of the cancellation request if appropriate, Then, a successful message will be displayed and the request will be passed to next handler, who will be notified by email.
Transfer	To transfer the cancellation request to another officer for vetting When the button is clicked, Search User window will pop up for selecting an officer to transfer for vetting. For details on search user, please refer to the Section 8.2. A notification of the transfer action will send to original handler and assigned handler by notification email.
Print to PDF	To generate details of the request in PDF format

4.4.3 Re-submit / withdraw / transfer Cancellation of Invitation Request

To re-submit / withdraw / transfer the cancellation request, the handler may follow the steps below:

1. Retrieve the cancellation request from the Inbox folder for re-submit/transfer or My Request folder for withdrawal by double clicking the request
2. View the Cancellation Request Summary with cover message and click **Request Details** button to view the details of cancellation request
3. Review and amend the details of the cancellation request
4. Choose the action button for further processing.



(Figure 4-68)

Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed. Notes: Only the request has been rejected, the button will be available.
Re-submit	To submit the cancellation request The system will perform validation on the user's inputs. If the validation is passed and the re-submit action is completed successfully, 1. A successful message will be displayed 2. The request will be passed to next handler, who will be notified by email. Notes: Only the request has been rejected, the button will be available.
Withdraw	To withdraw the cancellation request Then, the case will be closed and it can be located at My Handled Case folder. Notes: Only the requestor may withdraw the request. A notification of the withdrawal action will send to requestor and copy to handlers of previous processing task by notification email.
Transfer	To transfer the request to another officer When the button is clicked, Search User window will pop up for selecting an officer to transfer. For details on search user, please refer to the Section 8.2. Notes: Only the current handler may transfer the request to another officer to handler. A notification of the transfer action will send to original handler and assigned handler by notification email.
Print to PDF	To generate details of the request in PDF format

4.4.4 Issue Cancellation of Invitation

If the cancellation request is assigned to Issuing Group for issuing, please make reference to Section 4.2.1 for Pick / Distribute Requisition Request for Invitation Issuing.

The Issuing Officer may locate the request from the Inbox folder. To perform the cancellation issuing, please follow the steps below:

1. Double click the cancellation request to retrieve the details in the Inbox folder

Case ID	Subject	Task	Submitted By	Date Sent	Amount	Type	Request
0E314-00060	Purchase Notebook with Operating System	Issue Cancellation of Invitation	Chan Tai Man	08 Jul 2014 16:01:30	HKD \$30,000.00	SOA	ADD

(Figure 4-69)

2. View the Cancellation Request Summary with cover message and click the **Request Details** button to view the details of cancellation request.

The screenshot displays the SOA Cancellation of Invitation interface. At the top, there is a navigation bar with three steps: 'SOA Cancellation of Invitation' (highlighted in blue), 'Prepare' (grey), 'Vet' (grey), and 'Issue' (orange). Below the navigation bar, the 'Issue' step is highlighted with a blue bar.

Request Details:

- Subject:** Purchase Notebook with Operating System
- Requestor:** Chan Tai Man
- Message:** Dear Chan Tai Man ,
A cancellation of invitation request under SOA was ready for issuance. Below please find its summary for your quick reference. Please click the following button to view the details and issue the cancellation of invitation to supplier.
- Request Details Button:** A button labeled "Request Details" with a magnifying glass icon.

Request Summary:

Procurement Type and Amount	SOA (HKD) 30,000.00
Closing Date/Time	18 Jul 2014 12:00
Assessment	Single-Envelope
Acceptance Criteria	Group

Item Details:

Item no.	Group no.	Item Description	Unit	Qty
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00

Supplier Invitation List:

The number of supplier invited meets the minimum number required

SOA Category	PC Products - Add-on Software
Supplier Name	E-Service Testing Company 1 New Testing 01 Re-provision SIT Supplier 1 Test Activate existing

(Figure 4-70)

3. Review and amend the details of cancellation request if necessary. For details on data fields and buttons, please refer to Section 4.4.1.

The screenshot shows the 'SOA Cancellation of Invitation' application. The process flow is indicated by a horizontal bar at the top: 'Prepare' (grey), 'Vet' (orange), and 'Issue' (blue). The 'Issue' button is highlighted. Below the bar, there are several action buttons: Save, Issue, Reject, Transfer, Print to PDF, and two small icons.

Basic Information

Subject	Purchase Notebook with Operating System
SOA Type	PC SOA - PC Products
Acceptance Criteria	<input type="radio"/> Itemised <input checked="" type="radio"/> Group <input type="radio"/> Overall
Assessment	<input checked="" type="radio"/> Single-Envelope <input type="radio"/> Two-Envelope Marking Scheme

Declaration
- I declare that there is no conflict of interest in accordance with SPR 185 and 186

Item Details

Item No.	Grp No.	Description	Unit	Qty.
1	1	Notebook	Set	1.00
2	2	Operating System	Set	1.00

Est. Total Amt. (HKD) 30,000.00

Supplier Invitation List

Please select the category against which the SOA Contractors will be invited for submitting Acquisition Proposal

A - Total System Solution
<input checked="" type="checkbox"/> B - Add-on Software
C - Printers

Does the number of SOA Contractors invited meet the minimum required?
 Yes Less than minimum number & justification is given below

SOA Contractor

Company Name	E-Service Testing Company 1	<input type="checkbox"/> Remove from invitation list
Address	TEST	
Chris	25737113	Online

(Figure 4-71)

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Proposal Submission Details

Closing Date/Time 18 Jul 2014 12:00
Proposal Deposit Location through e-Procurement System for electronic submission

Please provide the arrangement in case supplier cannot submit the proposal through the e-Procurement System (e.g. by fax, by mail, by depositing them in a quotation box specified by the department or no other alternatives are provided)
19/F Wu Chung House, Wan Chai, Hong Kong

Government Contact for Supplier Enquiry

Name	Post Title	Tel No.	Email
Chan Tai Man	SM	12345678	tmchan@ogcio.gov.hk

[More Contact](#)

(Figure 4-72)

Processing History of the request is available at the bottom of the page.

Processing History and Remarks

Note
- The following officer(s) has/have declared that there is no conflict of interest in accordance with SPR 185 and 186

Submit Cancellation of Invitation Request - Submit	08 Jul 2014 15:41:10
Chan Tai Man , SM (Tel:) TM Chan/OGCIO/HKSARG	
Vet Cancellation of Invitation Request - Batch Pick	08 Jul 2014 15:41:27
Chan Tai Man , SM (Tel:) TM Chan/OGCIO/HKSARG	
Vet Cancellation of Invitation Request - Vet	08 Jul 2014 16:01:17
Chan Tai Man , SM (Tel:) TM Chan/OGCIO/HKSARG	
Issue Cancellation of Invitation - Batch Pick	08 Jul 2014 16:01:39
Chan Tai Man , SM (Tel:) TM Chan/OGCIO/HKSARG	

Internal Reference

Urgency [Optional]

File Ref No. [Optional] GCIO XXX

No	Filename	File Description	Created By
No files.			

Upload

(Figure 4-73)

4. Choose the action button for further processing.



(Figure 4-74)

Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed.
Issue	To issue the cancellation to the invited suppliers. The system will perform validation on the user's inputs. If the validation is passed and the issue action is completed successfully, 1. A successful message will be displayed. 2. The requestor will be notified by email. 3. The system will issue notification to the invited supplier contact person by email and fax. Besides, the system will publish the details to the external e-Procurement Portal for supplier. 4. After the notification delivered to suppliers, a notification will send to the Issuing Officer with delivery status by email.
Reject	To reject the request A pop-up window will be displayed to define next handler of the rejected request by clicking  button. The next handler can be the requestor or the previous vetting officer of the request if appropriate. Then, a successful message will be displayed and the request will be passed to next handler, who will be notified by email.
Transfer	To transfer the request to another officer for issuing cancellation. When the button is clicked, Search User window will pop up for selecting an officer to transfer for issuing. For details on search user, please refer to the Section 8.2. A notification of the transfer action will send to original handler and assigned handler by notification email.
Print to PDF	To generate details of the request in PDF format

When the system failed to deliver the notification to the invited supplier by fax, the Issuing Officer may re-issue the cancellation notification and must complete the issuance. The cancellation request for issuing will be appeared in the Inbox folder of the Issuing Officer. For details, please make reference to Section 4.2.3 Re-issue/Complete Invitation Issuing, which steps are similar.

4.5 QUOTATION BOX OPENING

4.5.1 Open Quotation Box

Under below conditions, Open Quotation Team member(s) will receive an email reminder on

- i. requisition which the submission closing date is approached, or;
- ii. requisition which the submission closing date pasted and it is pending for opening quotation box

Special Arrangement under Bad Weather

In case if a black rainstorm warning or a tropical cyclone signal No. 8 or above is hoisted (“inclement weather signal”) any time within three hours prior to the quotation closing time on the quotation closing date, the quotation closing date will be extended to the next working day (except Saturday, Sunday and public holiday) at the same closing time when no inclement weather signal has been hoisted any time within three hours prior to such closing time. In the event of any extension, references to “quotation closing date and time” shall be construed as the extended quotation closing date and time.

After the submission closing date and time, the Open Quotation Team member may locate the case from the Quotation Box folder, and then double click the case to retrieve the details.

CaseID	Subject	Type	Closing Date Time	Status
0E314-00066	Purchasing Server with Operating System 1	SOA	09 Jul 2014 09:00:00	Ready to Open
0E314-00067	Purchasing Server with Operating System 2	SOA	09 Jul 2014 09:00:00	Ready to Open

(Figure 4-75)

The Requisition Summary page displays. The team member may click the **Open Quotation Box** button.

Case Navigation	Internal Query	Requisition	Open Quotation Box
REQ_SUMMARY			
Subject Purchasing Server with Operating System 1 Procurement Type and Amount SOA (HKD) \$40,000.00 Closing Date and Time 09 Jul 2014 09:00:00 Assessment Single-Envelope Acceptance Criteria Group			
Rev No.	Created By	Created Date	Status
FirstIssue	Chan Tai Man	08 Jul 2014 17:34:52	Issued
			View

(Figure 4-76)

For Estimated Total Amount Not Exceeding HK\$ 50K

A successful message displays for completion of open quotation box. The Quotation Response page will display directly.

For Estimated Total Amount Exceeding HK\$ 50K

The Open Quotation Box page displays. To open the quotation box, the team member should:

1. Define the Chairman and Member of the Open Quotation
2. Generate secret code and deliver to Chairman and Member through email by clicking **Generate Secret Code** button of Chairman and Member respectively
3. The Chairman and Member have to enter the received secret codes at the same time in the same window under the same machine
4. Click the **Open & Start Input Quotation Response** button to open quotation box

The screenshot shows a software interface titled "OPEN_QUOTATION". At the top right is a button labeled "Open & Start Input Quotation Response". Below it is a section titled "Open Quotation Box" containing two sets of input fields. Each set has a label, a dropdown menu, and a "Secret Code" input field followed by a "Generate Secret Code" button. A "Declaration" section below contains a checkbox and a note about conflict of interest.

(Figure 4-77)

Data Field Description

Field Name	Field Description	
Name	Open Quotation Team Chairman and member.	Mandatory
Secret Code	Secret code received through Notes email Notes: the secret code will be invalid after the expiry time specified in the email.	Mandatory

Button Description

Button	Button Description
Generate Secret Code	To generate the secret code After the button clicked, an email with secret code and expiry time will deliver to Chairman or Member
Open & Start Input Quotation Response	To open the Quotation Response page for inputting the quotation response and evaluation result. A successful message displays for completion of open quotation box Please refer to Section 4.5.2 & 4.5.3.

4.5.2 Single-Envelope

4.5.2.1 Input Quotation Response

Quotation Response

In the Quotation Response page under Evaluation Summary, a list of response from invited suppliers display.

If supplier submitted proposal via e-Procurement system, the response information will display on the screen as below.

The screenshot shows the 'EVAL_DETAIL' interface with the 'Quotation Response' tab selected. The main content area displays the following information:

- Open Quotation Date and Time:** 09 Jul 2014 11:22:55
- Opened By:** Chan Tai Man, SM
- Declaration:** - I declare that there is no conflict of interest in accordance with SPR 185 and 186
- Response from Invited Suppliers:**
 - Supplier 1:**
 - Company Name:** E-Service Testing Company 1
 - Address:** TEST
 - Response:** Offer No Offer No Reply
 - Response Method:** Online
 - Contact:** Vincent Yau
 - Submission Date/Time:** 08 Jul 2014 18:14:59
- Proposal with Sample [Optional]:** Yes No
- P-Card Payment [Optional]:** Yes No
- If yes, which P-card bank:** HSBC Citibank BOCHK Either One

(Figure 4-78)

Otherwise, the response information will display on the screen as below

The screenshot shows the EVAL_DETAIL screen with the 'Quotation Response' tab selected. The interface includes a 'Case Navigation' sidebar with options like Internal Query, Requisition, Evaluation, and Clarification. The main area displays three rows of response details:

- Case 2:** Company Name: New Testing 01; Address: 100, King's Road North Point Hong Kong; Response: Offer No Offer No Reply.
- Case 3:** Company Name: Re-provision SIT Supplier 1; Address: 19/F Wu Chung Ha Ha Queen's Road East Wai Chai HK; Response: Offer No Offer No Reply.
- Case 4:** Company Name: Test Activate existing; Address: address 1 address 2 address 3 address 4 address 5; Response: Offer No Offer No Reply.

At the bottom left, there is an orange bar labeled "Additional Offer".

(Figure 4-79)

Click **Edit** button to input the response information.

The screenshot shows a software interface for managing quotation responses. At the top, there are several buttons: Transfer, Complete, Download Supplier Proposal, Print Quotation Response, Save, Edit, Cancel Edit, and Next. The main area is titled "Quotation Response" and "Internal Reference". Below this, the "Open Quotation Date and Time" is listed as 09 Jul 2014 11:22:55, and it was "Opened By" Chan Tai Man, SM.

Declaration:
- I declare that there is no conflict of interest in accordance with SPR 185 and 186

Response from Invited Suppliers:

- Supplier 1:** Company Name: E-Service Testing Company 1; Address: TEST; Response: Offer (radio button selected); Response Method: Online; Contact: Vincent Yau; Submission Date/Time: 08 Jul 2014 18:14:59. Options: Proposal with Sample [Optional] (Yes selected), P-Card Payment [Optional] (Yes selected). Note: If yes, which P-card bank (HSBC selected).
- Supplier 2:** Company Name: New Testing 01; Address: 100, King's Road North Point Hong Kong; Response: Offer (radio button selected); Response Method: Fax; Contact: Louise CHENG; Submission Date/Time: 08 Jul 2014 19:00:00. Options: Proposal with Sample [Optional] (No selected), P-Card Payment [Optional] (Yes selected).
- Supplier 3:** Company Name: Re-provision SIT Supplier 1; Address: 19/F Wu Chung Ha Ha Queen's Road East Wai Chai HK; Response: No Offer (radio button selected); Response Method: Fax; Contact: Andy 2; Submission Date/Time: 08 Jul 2014 20:00:00. Options: Proposal with Sample [Optional] (Yes selected), P-Card Payment [Optional] (No selected).
- Supplier 4:** Company Name: Test Activate existing; Address: address 1 address 2 address 3 address 4 address 5; Response: Offer (radio button selected); Response Method: Fax.

(Figure 4-80)

Data Field Description

Field Name	Field Description	
Response	Offer – The supplier submitted the quotation offer. No Offer – The supplier indicated that there is no offer to the quotation. No Reply – The supplier did not respond to the quotation. Notes: User should fill in the response for all invited supplier.	Mandatory
Response Method	Indicates the quotation submission channel (Fax, Post, Telephone, Email, or Other) by supplier	Mandatory
Contact	The contact person in supplier's response	Mandatory
Submission Date/Time	The submission date and time of the quotation	Mandatory
Proposal with Sample	Indicate whether the submitted proposal with sample	Optional
P-Card Payment	Indicate whether the supplier accepts p-card payment and which bank accepts	Optional

Click **Add Additional Offer** button to add an additional offer submitted by supplier or non-invited supplier

(Figure 4-81)

Button	Button Description
Add Additional Offer	<p>To input an additional offer submitted by supplier or non-invited supplier.</p> <p>This button is only available in edit mode.</p> <p>User may click this button to insert and enter an additional offer from invited supplier or non-invited supplier. Supplier and response information must be provided e.g. Company Name, Address, Response, Response Method, Contact, Submission Date/Time, Proposal with Sample, and P-Card Payment.</p>
	To remove the additional offer of supplier

User may choose the action buttons for further processing.



(Figure 4-82)

Button Description

Button	Button Description
Save	<p>To save the information inputted</p> <p>This button is only available in edit mode.</p> <p>After saved, a successful message will be displayed.</p>
Edit	<p>To change to edit mode and perform editing on quotation response</p> <p>When the page loaded, non-edit mode is set. User must click Edit button before input information.</p>
Cancel Edit	<p>To cancel the editing and return to non-edit mode.</p> <p>This button is only available in edit mode.</p>
Next	To go to Internal Reference page

Internal Reference

In the Internal Reference page under Evaluation Summary, Internal Reference and Processing History and Remarks will display. By clicking section heading (e.g. Internal Reference), the details of section will be displayed.

For details on the fields and related buttons of the Internal Reference, please refer to Section 4.1.1.8. Also, the Processing History of the case may be viewed as below.

(Figure 4-83)

User may choose the action button for further processing.



(Figure 4-84)

Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed.
Back	To go back to Quotation Response page

4.5.2.2 Evaluation

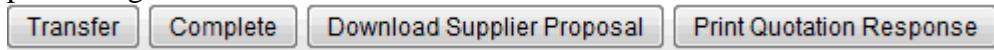
The user may download proposals submitted by suppliers via e-Procurement System for evaluation by clicking **Download Supplier Proposal** button. If necessary, clarification with supplier via e-Procurement system is allowed. For details, please refer to Section 4.6 Clarification.

4.5.2.3 Complete Quotation Opening

After all of the quotation responses inputted, and clarification completed in the system, the user shall complete the process by clicking **Complete** button.

Notes: Once the process completed, the case is closed. Further input and clarification with supplier through the system is not allowed.

User may choose the action button under Evaluation Summary for further processing.



(Figure 4-85)

Button Description

Button	Button Description
Transfer	To transfer the case to another officer for handling e.g. the requestor, for downloading evaluation documents and submitting clarifications. When the button is clicked, Search User window will pop up for selecting an officer to transfer. For details on search user, please refer to the Section 8.2. A notification of the transfer action will send to original handler and assigned handler by notification email.
Complete	To complete the quotation response input process The system will perform validation on the user's inputs. If the clarification process is not yet completed, an alert message will be displayed. This process cannot be completed. If the validation is passed and the action is completed successfully, a successful message will be displayed
Download Supplier Proposal	To download proposals submitted by suppliers via e-Procurement System A zip file contains suppliers' proposals is downloaded to the user's desktop. If there is no quotation response from supplier via e-submission, the message of no files for download will be displayed. The zip file contains sub-folder for each supplier (who has responded to invitation) containing the proposals submitted by the supplier contact.
Print Quotation Response	To generate the quotation response details report in PDF format.

4.5.3 Two Envelope

4.5.3.1 Input Quotation Response

Quotation Response

In the Quotation Response page under Evaluation Summary, a list of response from invited suppliers display.

If supplier submitted proposal via e-Procurement system, the response information will be displayed on the screen as below.

The screenshot shows the EVAL_DETAIL interface with the 'Quotation Response' tab selected. The response details are as follows:

- Open Quotation Date and Time:** 09 Jul 2014 12:01:41
- Opened By:** Chan Tai Man, SM
- Declaration:** - I declare that there is no conflict of interest in accordance with SPR 185 and 186
- Response from Invited Suppliers:**
 - 1** Company Name: E-Service Testing Company 1
 - Address: TEST
 - Response: Offer No Offer No Reply
 - Response Method: Online
 - Contact: Vincent Yau
 - Submission Date/Time: 08 Jul 2014 18:21:09
- Proposal with Sample [Optional]:** Yes No
- P-Card Payment [Optional]:** Yes No
- If yes, which P-card bank: HSBC Citibank BOCHK Either One

(Figure 4-86)

Otherwise, the response information will display on the screen as below

The screenshot shows the EVAL_DETAIL interface with the 'Quotation Response' tab selected. The responses are listed as follows:

- 1** Company Name: New Testing 01
Address: 100, King's Road North Point Hong Kong
Response: Offer No Offer No Reply
- 2** Company Name: Re-provision SIT Supplier 1
Address: 19/F Wu Chung Ha Ha Queen's Road East Wai Chai HK
Response: Offer No Offer No Reply
- 3** Company Name: Test Activate existing
Address: address 1 address 2 address 3 address 4 address 5
Response: Offer No Offer No Reply

(Figure 4-87)

Click **Edit** button to input the response information.

The screenshot shows a software interface for managing quotation responses. At the top, there are several buttons: Transfer, Complete Technical Evaluation, Download Technical Proposal, Print Quotation Response, Save, Edit, Cancel Edit, and Next. The main area is titled "Quotation Response" and "Internal Reference". Below this, the "Open Quotation Date and Time" is listed as "09 Jul 2014 12:01:41" and "Opened By" is "Chan Tai Man, SM". A "Declaration" section contains the text: "I declare that there is no conflict of interest in accordance with SPR 185 and 186".

Response from Invited Suppliers:

- Supplier 1:** Company Name: E-Service Testing Company 1; Address: TEST; Response: Offer (selected); Response Method: Online; Contact: Vincent Yau; Submission Date/Time: 08 Jul 2014 18:21:09. Options: Proposal with Sample (Yes selected), P-Card Payment (Yes selected), If yes, which P-card bank: HSBC, Citibank, BOCHK, Either One.
- Supplier 2:** Company Name: New Testing 01; Address: 100, King's Road North Point Hong Kong; Response: Offer (selected); Response Method: Post; Contact: Louise CHENG; Submission Date/Time: 08 Jul 2014 19:00:00. Options: Proposal with Sample (Yes selected), P-Card Payment (Yes selected), If yes, which P-card bank: HSBC, Citibank, BOCHK, Either One.
- Supplier 3:** Company Name: Re-provision SIT Supplier 1; Address: 19/F Wu Chung Ha Ha Queen's Road East Wai Chai HK; Response: No Offer (selected); Response Method: Fax; Contact: Andy 2; Submission Date/Time: 08 Jul 2014 18:55:00. Options: Proposal with Sample (Yes selected), P-Card Payment (Yes selected), If yes, which P-card bank: HSBC, Citibank, BOCHK, Either One.
- Supplier 4:** Company Name: Test Activate existing; Address: address 1 address 2 address 3 address 4 address 5; Response: No Offer (selected); Response Method: Fax; Contact: (empty); Submission Date/Time: (empty). Options: Proposal with Sample (Yes selected), P-Card Payment (Yes selected), If yes, which P-card bank: HSBC, Citibank, BOCHK, Either One.

(Figure 4-88)

Click **Add Additional Offer** button to add an additional offer submitted by supplier or non-invited supplier

The screenshot shows a user interface for adding an additional offer. At the top, there is a red header bar with the title 'Additional Offer'. Below it, a grey toolbar contains a button labeled 'Add Additional Offer'. The main form area has a light yellow background. It includes the following fields:

- A row with a small number '1' and a red minus button, followed by a 'Company Name' input field with a dropdown arrow and a magnifying glass icon.
- An 'Address' section with five stacked input fields.
- A 'Response' section with radio buttons for 'Offer' (selected) and 'No Offer'.
- A 'Response Method' dropdown menu.
- A 'Contact' input field.
- A 'Submission Date/Time' field with a calendar icon and a dropdown arrow.

At the bottom of the form, there are two sections of optional checkboxes:

- 'Proposal with Sample [Optional]' with radio buttons for 'Yes' (selected) and 'No'.
- 'P-Card Payment [Optional]' with radio buttons for 'Yes' (selected) and 'No'.

(Figure 4-89)

For details on the fields and related buttons of the Quotation Response, please refer to Section 4.5.2.1 on Quotation Response.

Internal Reference

In the Internal Reference page under Evaluation Summary, Internal Reference, Processing History and Remarks, and Review Subsequent Approval Path will display. By clicking section heading (e.g. Internal Reference), the details of section will be displayed.

For details on the fields and related buttons of the Internal Reference, please refer to Section 4.1.1.8. Also, the Processing History of the case may be viewed as below.

The screenshot shows the 'EVAL_DETAIL' interface with the 'Internal Reference' tab selected. At the top, there are buttons for Transfer, Complete Technical Evaluation, Download Technical Proposal, Print Quotation Response, Back, and Save. Below the tabs, there is a table with columns: No, Filename, File Description, and Created By. An 'Upload' button is also present. A note below the table states: 'File Ref No. [Optional] -'. A link to 'Edit' is provided. In the 'Processing History and Remarks' section, there is a note: 'Note - The following officer(s) has/have declared that there is no conflict of interest in accordance with SPR 185 and 186'. Below this, a box shows an entry for 'Open Quotation Box - Open Quotation Box' by 'Chan Tai Man, SM (Tel:)' on '09 Jul 2014 12:01:46'. The entry includes icons for user profile, email, and delete.

(Figure 4-90)

In the Review subsequent Approval Path, Download Price Proposal task should be defined by clicking button to search user.

The screenshot shows the 'Review Subsequent Approval Path' interface. It displays a table with columns: Task Name, Mandatory, Officer Name, Post Title, and Action. The table contains two rows: 'Input Quotation Response & Start Technical Evaluation' (Mandatory Yes, Officer Name Chan Tai Man, Post Title SM) and 'Download Price Proposal' (Mandatory Yes, Officer Name Chan Chung Man, Post Title AP). To the right of the second row is a search icon and a delete icon.

(Figure 4-91)

User may choose the action button for further processing.



(Figure 4-92)

Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed.
Back	To go back to Quotation Response page

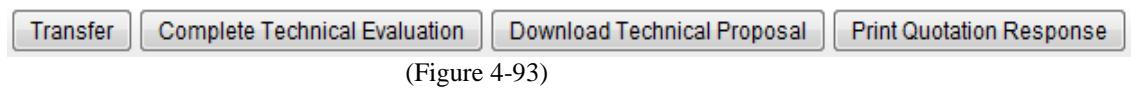
4.5.3.2 Technical Evaluation

The user may download technical proposals submitted by suppliers via e-Procurement System by clicking **Download Technical Proposal** button to perform technical evaluation. If necessary, clarification with supplier via e-Procurement system is allowed. For details, please refer to Section 4.6 Clarification.

After technical evaluation completed, the user shall click **Complete Technical Evaluation** button to complete the technical evaluation. A confirmation message will prompt.

In case, handling staff of the task Download Price Proposal is not yet defined in the Review Subsequent Approval Path, the system will ask whether the user continue the Download Price Proposal task immediately.

Notes: Once the technical evaluation completed, further input on quotation response in the system is not allowed.



Button Description

Button	Button Description
Transfer	To transfer the case to another officer When the button is clicked, Search User window will pop up for selecting an officer to transfer. For details on search user, please refer to the Section 8.2. A notification of the transfer action will send to original handler and assigned handler by notification email.
Complete Technical Evaluation	To complete the quotation response input process and the technical evaluation The system will perform validation on the user's inputs. If the validation is passed and the action is completed successfully, a successful message will be displayed. The task will be passed to the next handler for the task Download Price Proposal, who will be notified by email. If user has not defined the next handler for the task Download Price Proposal, the system prompts whether the user wants to handle the task immediately.
Download Technical Proposal	To download technical proposals submitted by suppliers via e-Procurement System A zip file contains suppliers' technical proposals is downloaded to the user's desktop. If there is no quotation response from supplier via e-submission, the message for no files for download will be displayed. The zip file contains sub-folder for each supplier (who has responded to invitation) containing the proposals submitted by the supplier contact.

Button	Button Description
Print Quotation Response	To generate the quotation response details report in PDF format.

4.5.3.3 Price Evaluation

The handler for Download Price Proposal task may locate the request from the Inbox folder and double click the request to retrieve the details.

(Figure 4-94)

The Evaluation Detail page displays as below. For details on the fields and related buttons of the Quotation Response, please refer to Section 4.5.2.1 on Quotation Response.

(Figure 4-95)

The handler may download proposals with technical and price submitted by suppliers via e-Procurement System for further evaluation by clicking **Download Supplier Proposal** button. If necessary, clarification with supplier via e-Procurement system is allowed. For details, please refer to Section 4.6 Clarification.

4.5.3.4 Complete Quotation Opening

After the clarification completed in the system, the user shall complete the process by clicking **Complete** button.

Notes: Once the process completed, the case is closed. Further input and clarification with supplier through the system is not allowed.



(Figure 4-96)

Button Description

Button	Button Description
Complete	To complete the Download Supplier Proposal task If the clarification process is not yet completed, an alert message will be displayed. This process cannot be completed. Otherwise, a successful message will be displayed
Download Supplier Proposal	To download technical and price proposals submitted by suppliers via e-Procurement System A zip file contains suppliers' proposals is downloaded to the user's desktop. If there is no quotation response from supplier via e-submission, the message "No files for download" will be displayed. The zip file contains sub-folder for each supplier (who has responded to invitation) containing the proposals submitted by the supplier contact.
Download Technical Proposal	To download technical proposals submitted by suppliers via e-Procurement System A zip file contains suppliers' technical proposals is downloaded to the user's desktop. If there is no quotation response from supplier via e-submission, the message for no files for download will be displayed. The zip file contains sub-folder for each supplier (who has responded to invitation) containing the proposals submitted by the supplier contact.
Print Quotation Response	To generate the quotation response details report in PDF format.

4.6 CLARIFICATION

4.6.1 Prepare Clarification

During the evaluation, the user is allowed to raise a clarification with supplier once quotation responses saved

Notes: Clarification function can only be available before the case is completed and closed, for details please refer to section 4.5.2 & 4.5.3.

To raise a clarification, please follow the steps below:

1. Double click the case in the My Handled Case folder

Case ID	Subject	Task	Submitted By	Date Sent	Amount	Type	Request
0E314-00067	Purchasing Server with Operating System 2	Download Price Proposal	Chan Tai Man	09 Jul 2014 12:39:22	HKD \$40,000.00	SOA	EVA

(Figure 4-97)

2. Double click Clarification in Case Navigation under Evaluation Details to open Clarification Summary page

Declaration

- I declare that there is no conflict of interest in accordance with SPR 185 and 186

Response from Invited Suppliers

1

Company Name: E-Service Testing Company 1
Address: TEST
Response: Offer No Offer No Reply
Response Method: Online
Contact: Vincent Yau
Submission Date/Time: 08 Jul 2014 18:21:09

Proposal with Sample [Optional]: Yes No
P-Card Payment [Optional]: Yes No
If yes, which P-card bank: HSBC Citibank BOCHK Either One

(Figure 4-98)

3. A list of invited suppliers will show in the Clarification Summary page. To raise clarification to the corresponding supplier, click **Open Clarification** button

(Figure 4-99)

4. Clarification page in Prepare stage displays. The handler may provide the information on the clarification.

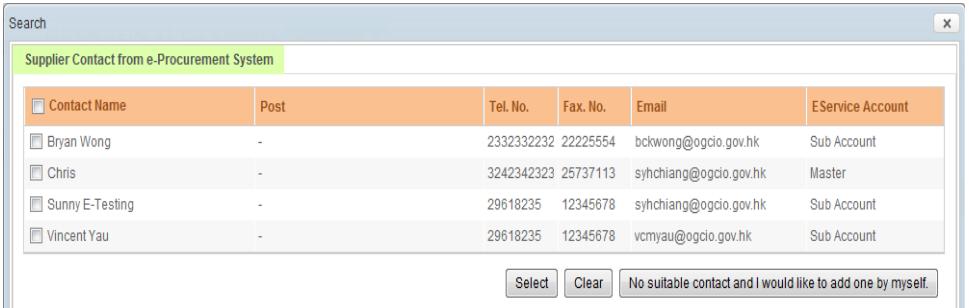
(Figure 4-100)

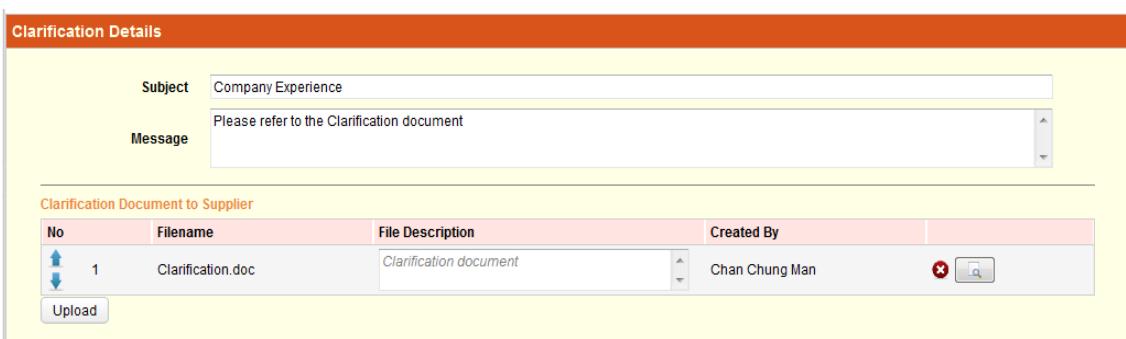
Data Field Description

Field Name	Field Description	
Company / Address	The company name and address of the supplier	Non-Editable
	The supplier contact person who will receive the clarification request	Non-Editable
	The supplier contact person fax number	Editable

Button Description

Button	Button Description
	To display the invitation delivery status of the supplier
	To view the invitation cover letter.

Button	Button Description
More Contact	<p>To add contact person for the respective supplier. A pop-up window will be displayed for selection or a new contact creation.</p>  <p>Select button: To select appropriate contact person(s) Clear button: To clear the selection No suitable contact and I would like to add one by myself button: To add a new contact person by user input. Then, a new row appends in supplier contact person</p>
	To remove the supplier contact person



(Figure 4-101)

Data Field Description

Field Name	Field Description	
Subject	Clarification subject	Editable
Message	Clarification message	Editable
Clarification Document to Supplier - File Description	Description of the uploaded file	Editable

Button Description

Button	Button Description
	To move the selected item up or down to change the order

Button	Button Description
Upload	To browse and upload file Notes: 1. The file should be in Word, Excel, PDF, or Plain Text format. 2. The maximum file size of each uploaded document is 5 MB.
	To view the original uploaded file
	To remove the uploaded file
	To view the combined document
	To replace the document

Processing Path

Task Name	Mandatory	Officer Name	Post Title	
Submit Clarification Request	Yes	Chan Chung Man	AP	 
Vet Clarification Request	Add Officer (Max 5)	Vetting Group	Group	 
Issue Clarification	Yes	Issuing Group	Group	 

(Figure 4-102)

Data Field Description

Field Name	Field Description	
Mandatory / Officer Name / Post Title (Submit Clarification Request)	Mandatory: 'Yes' (the task is necessary) The officer submits the clarification request.	Non-Editable
Mandatory / Officer Name / Post Title (Vet Clarification Request)	Mandatory: 'No' (the task is not necessary) The individual officer or vetting group vets the clarification request. At most 5 vetting officers or groups are assigned for vetting the request.	Non-Editable / Optional
Mandatory / Officer Name / Post Title (Issue Clarification)	Mandatory: 'Yes' (the task is necessary) The individual officer or issuing group issues the clarification to suppliers.	Non-Editable / Mandatory

Button Description

Button	Button Description
Add officer	To add one more officer for Vet Clarification Request When the link is clicked, a new row will be inserted.

Button	Button Description
	To search officer / group and assign to process the task When the button is clicked, Search User / User Group window pops up. After an officer / a user group searched and selected, the details of information show in the table. For details on search user, please refer to the Section 8.2.
	To remove officer / group from the processing task

Internal Reference

Urgency [Optional]

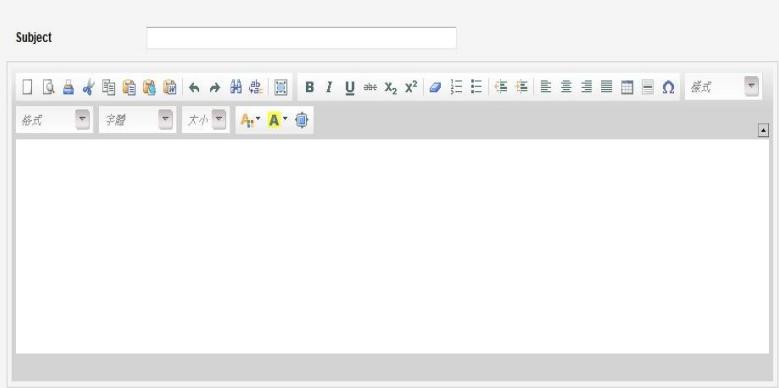
File Ref No. [Optional] -

No	Filename	File Description	Created By
No files.			

You can input remarks for internal reference [Optional] [Edit](#)

(Figure 4-103)

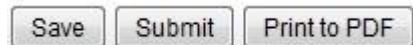
Data Field Description

Field Name	Field Description	
Urgency	Indicate the urgency of the request.	Optional
File Ref No.	Internal reference number for record.	Optional
Filename	Display the name of file uploaded to system	Optional
File Description	Description of the uploaded file If the file is uploaded, the file description is mandatory to input.	Mandatory
You can input remarks for internal reference	<p>Click Edit link to input the remarks in the editor panel.</p> <p>You can input remarks for internal reference [Optional] Edit</p>  <p>User may input Subject and Details in the panel. The content can be formatted by using the editor features.</p>	Optional

Input Button Description

Button	Description
Upload	To browse and upload file Notes: 1. The file should be in Word, Excel, PDF, or Plain Text format. 2. The maximum file size of each uploaded document is 5 MB.
	To view the uploaded file
	To remove the uploaded file

5. Choose the action button for further processing.



(Figure 4-104)

Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed. The request can be found in requestor's My Draft folder.
Submit	To submit the clarification request The system will perform validation on the user's inputs. If the validation is passed and the submit action is completed successfully, 1. A successful message will be displayed 2. If there is no Vet Clarification Request task, the system will render clarification document and combine the document in a single PDF format. This step will take a few minutes to process 3. The request will be passed to next handler, who will be notified by email If Vet Clarification Request task is required and the requestor is also the next handler, the system will ask whether the requestor continue the vetting task immediately or not.
Print to PDF	To generate details of the request in PDF format

4.6.2 Vet Clarification

If the clarification request requires vetting by a Vetting Group, please make reference to Section 4.1.2 for Pick / Distribute Requisition Request for Vetting.

The Vetting Officer may locate the clarification request from the Inbox folder. To perform the vetting, please follow the steps below:

1. Double click the clarification request to retrieve the details in the Inbox folder.

Case ID	Subject	Task	Submitted By	Date Sent	Amount	Type	Request
OE314-00067	Purchasing Server with Operating System 2	Vet Clarification Request	Chan Chung Man	09 Jul 2014 15:26:52		SOA	CLA

(Figure 4-105)

2. Review and amend the details of clarification request if necessary. For details on data fields and buttons, please refer to Section 4.6.1.

CLA_DETAIL x

Save Vet Reject Transfer Print to PDF + -

Clarification ————— **Vet** ————— Issue

Supplier Information

Company E-Service Testing Company 1
Address TEST

Person: Vincent Yau (12345678) Online

[More Contact](#)

Clarification Details

Subject: Company Experience
Message: Please refer to the Clarification document

Clarification Document to Supplier

No	Filename	File Description	Created By
1	Clarification.doc	Clarification Document	Chan Chung Man

[Upload](#)

Processing History and Remarks

Note
- The following officer(s) has/have declared that there is no conflict of interest in accordance with SPR 185 and 186

Submit Clarification Request - Submit 09 Jul 2014 15:26:52
Chan Chung Man, AP (Tel:) Bryan CK WONG/OCGIO/HKSARG

Vet Clarification Request - Batch Pick 09 Jul 2014 15:27:37
Chan Tai Man, SM (Tel:) TM Chan/OCGIO/HKSARG

Processing Path

Task Name	Mandatory	Officer Name	Post Title
Vet Clarification Request	Add Officer (Max 5)	Chan Tai Man	SM
Issue Clarification	Yes	Issuing Group	

Internal Reference

Urgency [Optional]
File Ref No. [Optional] -

No	Filename	File Description	Created By
Upload			

You can input remarks for internal reference [Optional] [Edit](#)

(Figure 4-106)

3. Choose the action buttons for further processing.



(Figure 4-107)

Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed.
Vet	To complete the vetting process The system will perform validation on the user's inputs. If the validation is passed and the vet action is completed successfully, 1. A successful message will be displayed 2. If there is no further Vet Clarification Request task, the system will render clarification document and combine the document in a single PDF format. This step will take a few minutes to process. 3. The request will be passed to next handler, who will be notified by email.
Reject	To reject the request A pop-up window will be displayed to define next handler of the rejected request by clicking button. The next handler can be the clarification requestor or the previous vetting officer of clarification if appropriate. Then, a successful message will be displayed and the request will be passed to next handler, who will be notified by email.
Transfer	To transfer the clarification request to another officer for vetting When the button is clicked, Search User window will pop up for selecting an officer to transfer for vetting. For details on search user, please refer to the Section 8.2. A notification of the transfer action will send to original handler and assigned handler by notification email.
Print to PDF	To generate details of the request in PDF format

4.6.3 Issue Clarification

If the clarification request is assigned to Issuing Group for issuing, please make reference to Section 4.2.1 for Pick / Distribute Requisition Request for Invitation Issuing.

The Issuing Officer may locate the request from the Inbox folder. To perform the clarification issuing, please follow the steps below:

1. Double click the clarification request to retrieve the details in the Inbox folder

	Case ID	Subject	Task	Submitted By	Date Sent	Amount	Type	Request
!	0E314-00067	Purchasing Server with Operating System 2	Issue Clarification	Chan Chung Man	09 Jul 2014 15:34:02		SOA	CLA

(Figure 4-108)

2. Review and amend the details of clarification request if necessary. For details on data fields and buttons, please refer to Section 4.6.1. The system combined the clarification document(s) into a single PDF file. The Issuing Officer may view the PDF or replace the document if necessary.

USER MANUAL OF IT SOA FUNCTION

CLA_DETAIL

Save Issue Reject Transfer Print to PDF + -

Clarification ————— Prepare ————— Vet ————— **Issue**

Supplier Information

Company E-Service Testing Company 1
Address TEST

Avatar: Vincent Yau (dropdown menu)
Phone: 12345678
Status: Online

[More Contact](#)

Clarification Details

Subject: Company Experience
Message: Please refer to the Clarification document

Clarification Document to Supplier

No	Filename	File Description	Created By
1	Clarification.doc	Clarification Document	Chan Chung Man
2		This is Combined Document.	System

Processing History and Remarks

Note
- The following officer(s) has/have declared that there is no conflict of interest in accordance with SPR 185 and 186

Submit Clarification Request - Submit 09 Jul 2014 15:26:52
Chan Chung Man, AP (Tel:) Bryan CK WONG/OGCIO/HKSARG

Vet Clarification Request - Batch Pick 09 Jul 2014 15:27:37
Chan Tai Man, SM (Tel:) TM Chan/OGCIO/HKSARG

Vet Clarification Request - Vet 09 Jul 2014 15:33:12
Chan Tai Man, SM (Tel:) TM Chan/OGCIO/HKSARG

Issue Clarification - Batch Pick 09 Jul 2014 15:34:16
Chan Tai Man, SM (Tel:) TM Chan/OGCIO/HKSARG

Internal Reference

Urgency [Optional]
File Ref No. [Optional] -

No Filename File Description Created By

Upload

You can input remarks for internal reference [Optional] [Edit](#)

(Figure 4-109)

3. Choose the action button for further processing.



(Figure 4-110)

Button Description

Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed.
Issue	To issue the clarification to the supplier. The system will perform validation on the user's inputs. If the validation is passed and issue action is completed successfully, 1. A successful message will be displayed. 2. The requestor will be notified by email. 3. The system will issue notification to the supplier contact person by email and fax. Besides, the system will publish the information to the external e-Procurement Portal for supplier.
Reject	To reject the request A pop-up window will be displayed to define next handler of the rejected request by clicking button. The next handler can be the requestor or the previous vetting officer of the request if appropriate. Then, a successful message will be displayed and the request will be passed to next handler, who will be notified by email.
Transfer	To transfer the request to another officer for issuing clarification. When the button is clicked, Search User window will pop up for selecting an officer to transfer for issuing. For details on search user, please refer to the Section 8.2. A notification of the transfer action will send to original handler and assigned handler by notification email.
Print to PDF	To generate details of the request in PDF format

When the system failed to deliver the notification to the supplier by fax, the Issuing Officer may re-issue the clarification notification and must complete the issuance. The clarification request for issuing will be appeared in the Inbox folder of the Issuing Officer. For details, please make reference to Section 4.2.3 Re-issue/Complete Invitation Issuing, which steps are similar.

4.6.4 Input Clarification Response and Complete Clarification

After the supplier replied the clarification, the user should input the clarification response into the system. To input clarification response, please follow the steps below:

1. Double click the case to retrieve the case in the My Handled Case folder

Case ID	Subject	Type	Case Handled On	Created By	Case Owned By	By Others
0E314-00067	Purchasing Server with Operating System 2	SOA	09 Jul 2014 15:39:02	Chan Tai Man	SM	

(Figure 4-111)

2. Double click Clarification in Case Navigation under Evaluation Details to view the Clarification Summary page

Quotation Response Internal Reference

Open Quotation Date and Time: 09 Jul 2014 12:01:41
Opened By: Chan Tai Man, SM

Declaration
- I declare that there is no conflict of interest in accordance with SPR 185 and 186

Response from Invited Suppliers

1

Company Name: E-Service Testing Company 1
Address: TEST
Response: Offer No Offer No Reply
Response Method: Online
Contact: Vincent Yau
Submission Date/Time: 08 Jul 2014 18:21:09

Proposal with Sample [Optional]: Yes No
P-Card Payment [Optional]: Yes No
If yes, which P-card bank: HSBC Citibank BOCHK Either One

(Figure 4-112)

3. Click **View** button to view the clarification response.

Clarification Subject	Issue Date	Created By	Status	Action
Company Experience	09 Jul 2014 15:39:02	Chan Chung Man	Issued	View
New Testing 01 (Louise CHENG)				Open Clarification
Re-provision SIT Supplier 1 (Andy 2)				Open Clarification
Test Activate existing				Open Clarification

(Figure 4-113)

4. The Clarification Details displays as follow. Click **Input Clarification Response** button to provide Supplier Response

USER MANUAL OF IT SOA FUNCTION

				Input Clarification Response	Print to PDF																					
Supplier Information																										
<p>Company E-Service Testing Company 1</p> <p>Address TEST</p> <p> Vincent Yau 12345678 Online </p>																										
Clarification Details																										
<p>Subject Company Experience</p> <p>Message Please refer to the Clarification document</p>																										
<p>Clarification Document to Supplier</p> <table border="1"> <thead> <tr> <th>No</th> <th>Filename</th> <th>File Description</th> <th>Created By</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Clarification.doc</td> <td>Clarification Document</td> <td>Chan Chung Man</td> </tr> <tr> <td>2</td> <td></td> <td>This is Combined Document.</td> <td>System</td> </tr> </tbody> </table>							No	Filename	File Description	Created By	1	Clarification.doc	Clarification Document	Chan Chung Man	2		This is Combined Document.	System								
No	Filename	File Description	Created By																							
1	Clarification.doc	Clarification Document	Chan Chung Man																							
2		This is Combined Document.	System																							
Supplier Response																										
<p>Response Date 09 Jul 2014</p> <p>Response By Vincent Yau</p> <p>Reviewed By</p> <p>Response Description Please find the attached file for company experience certificate</p>																										
<p>Response Document</p> <table border="1"> <thead> <tr> <th>No</th> <th>Filename</th> <th>File Description</th> <th>Created By</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Health Check Case 2 Cla Sup Doc.doc</td> <td>company experience certificate</td> <td>Chan Tai Man</td> </tr> </tbody> </table>							No	Filename	File Description	Created By	1	Health Check Case 2 Cla Sup Doc.doc	company experience certificate	Chan Tai Man												
No	Filename	File Description	Created By																							
1	Health Check Case 2 Cla Sup Doc.doc	company experience certificate	Chan Tai Man																							
Processing History and Remarks																										
<p>Note</p> <p>- The following officer(s) has/have declared that there is no conflict of interest in accordance with SPR 165 and 186</p> <table border="1"> <tr> <td>Submit Clarification Request - Submit</td> <td>09 Jul 2014 15:26:52</td> </tr> <tr> <td> Chan Chung Man , AP (Tel:) Bryan CK WONG/OCGIO/HKSARG</td> <td></td> </tr> <tr> <td>Vet Clarification Request - Batch Pick</td> <td>09 Jul 2014 15:27:37</td> </tr> <tr> <td> Chan Tai Man , SM (Tel:) TM Chan/OCGIO/HKSARG</td> <td></td> </tr> <tr> <td>Vet Clarification Request - Vet</td> <td>09 Jul 2014 15:33:12</td> </tr> <tr> <td> Chan Tai Man , SM (Tel:) TM Chan/OCGIO/HKSARG</td> <td></td> </tr> <tr> <td>Issue Clarification - Batch Pick</td> <td>09 Jul 2014 15:34:16</td> </tr> <tr> <td> Chan Tai Man , SM (Tel:) TM Chan/OCGIO/HKSARG</td> <td></td> </tr> <tr> <td>Issue Clarification - Issue</td> <td>09 Jul 2014 15:39:02</td> </tr> <tr> <td> Chan Tai Man , SM (Tel:) TM Chan/OCGIO/HKSARG</td> <td></td> </tr> </table>							Submit Clarification Request - Submit	09 Jul 2014 15:26:52	Chan Chung Man , AP (Tel:) Bryan CK WONG/OCGIO/HKSARG		Vet Clarification Request - Batch Pick	09 Jul 2014 15:27:37	Chan Tai Man , SM (Tel:) TM Chan/OCGIO/HKSARG		Vet Clarification Request - Vet	09 Jul 2014 15:33:12	Chan Tai Man , SM (Tel:) TM Chan/OCGIO/HKSARG		Issue Clarification - Batch Pick	09 Jul 2014 15:34:16	Chan Tai Man , SM (Tel:) TM Chan/OCGIO/HKSARG		Issue Clarification - Issue	09 Jul 2014 15:39:02	Chan Tai Man , SM (Tel:) TM Chan/OCGIO/HKSARG	
Submit Clarification Request - Submit	09 Jul 2014 15:26:52																									
Chan Chung Man , AP (Tel:) Bryan CK WONG/OCGIO/HKSARG																										
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Vet Clarification Request - Vet	09 Jul 2014 15:33:12																									
Chan Tai Man , SM (Tel:) TM Chan/OCGIO/HKSARG																										
Issue Clarification - Batch Pick	09 Jul 2014 15:34:16																									
Chan Tai Man , SM (Tel:) TM Chan/OCGIO/HKSARG																										
Issue Clarification - Issue	09 Jul 2014 15:39:02																									
Chan Tai Man , SM (Tel:) TM Chan/OCGIO/HKSARG																										
Internal Reference																										
<p>Urgency [Optional] <input type="checkbox"/></p> <p>File Ref No. [Optional] -</p> <table border="1"> <thead> <tr> <th>No</th> <th>Filename</th> <th>File Description</th> <th>Created By</th> </tr> </thead> </table>							No	Filename	File Description	Created By																
No	Filename	File Description	Created By																							

(Figure 4-114)

If the response submitted by the supplier outside the system, the following page is shown. The response details should be inputted.

The screenshot shows a web-based application interface for managing supplier clarifications. At the top right are buttons for 'Save Clarification Response', 'Complete Clarification', 'Print to PDF', and a '+' icon. Below this is a section titled 'Clarification Details' with fields for 'Subject' (Company Experience) and 'Message' (Please refer to the Clarification document). A table titled 'Clarification Document to Supplier' lists two documents: 'Clarification.doc' (Clarification document, created by Chan Tai Man) and 'This is Combined Document.' (created by System). Below this is a 'Supplier Response' section with fields for 'Response Date' (with a calendar icon), 'Response By' (a dropdown menu), 'Reviewed By' (a dropdown menu), and a large text area for '* Response Description'. At the bottom is a 'Response Document' section with a table for uploading files and a 'Upload' button.

(Figure 4-115)

Data Field Description

Field Name	Field Description	
Response Date	To display clarification response date	Editable
Response By	To indicate whom (supplier contact) responses the clarification	Editable
Reviewed By	To indicate whom (internal user) reviews the response	Editable
Response Description	Supplier's response	Editable
Response Document	Supplier response document To upload the clarification response submitted by supplier for recording if necessary	

If the response submitted by the supplier through the system, the following page is shown. The response details will be available.

Clarification Details

Subject: Company Experience
Message: Please refer to the Clarification document

No	Filename	File Description	Created By
1	Clarification.doc	Clarification Document	Chan Chung Man
2		This is Combined Document.	System

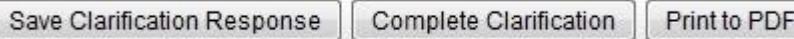
Supplier Response

Response Date: 09 Jul 2014
Response By: Vincent Yau
Reviewed By:
*** Response Description:** Please find the attached file for company experience certificate

No	Filename	File Description	Created By
1	Health Check Case 2 Cla Sup Doc.doc	company experience certificate	Chan Tai Man

(Figure 4-116)

5. Choose the action button for further processing.



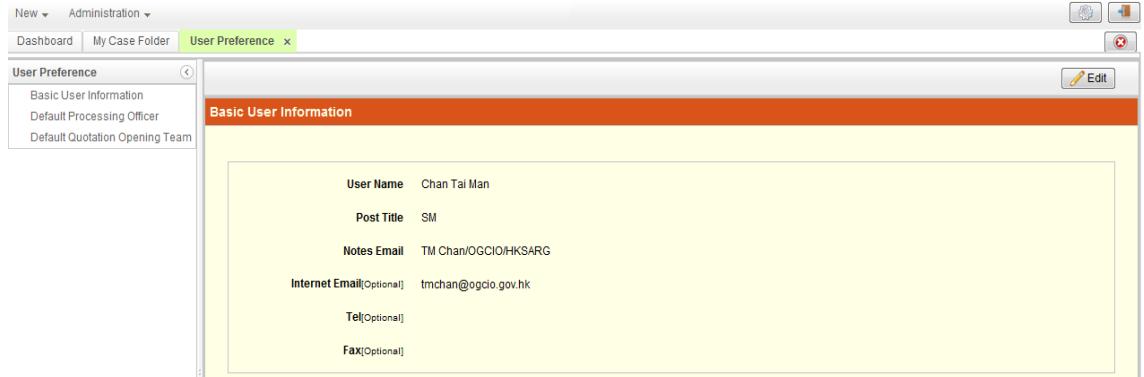
(Figure 4-117)

Button Description

Button	Button Description
Save Clarification Response	To save the clarification response inputted After saved, a successful message will be displayed.
Complete Clarification	To complete the clarification process The system will perform validation on the user's inputs. If the validation is passed and the action is completed successfully, a successful message will be displayed. After the completion, further input on the clarification response is not allowed.
Print to PDF	To generate details of the request in PDF format

5. USER PREFERENCE

In the upper right side of page, click  button to configure User Preference setting including Basic User Information, Default Processing Officer, and Default Quotation Opening Team. The User Preference tab page will be displayed.



(Figure 5-1)

5.1 BASIC USER INFORMATION

To view/modify the user profile, please follow the steps below:

1. Click Basic User Information in the left menu to view user profile information



(Figure 5-2)

2. Click **Edit** button to modify the profile information, e.g. Notes Email, Internet Email (Optional), Tel (Optional), Fax(Optional) etc.

User Name: Chan Tai Man
Post Title: SM
Notes Email: TM Chan/OGCIO/HKSARG
Internet Email[Optional]: tmchan@ogcio.gov.hk
Tel[Optional]:
FAX[Optional]:

(Figure 5-3)

3. Click **Save** button to update the setting. After saved, a successful message will be displayed.

5.2 DEFAULT PROCESSING OFFICER

User may define own default processing officer for tasks (Vet and Issue) of functions (create Requisition, Addendum, and Cancellation) by clicking Default Processing Officer in the left menu. The default processing officers / user groups will be assigned for corresponding tasks by function. To view/modify the Default Processing Officer, please follow the steps below:

1. Click Default Processing Officer in the left menu

You may define default processing officer(s) for the tasks of the functions below.
Function Name:

(Figure 5-4)

2. Select Function Name (Create IT-SOA Requisition, Create IT-SOA Addendum, or Create IT-SOA Cancellation of Invitation) to view the information for individual function

The screenshot shows a configuration interface titled 'Default Processing Officer'. At the top right is an 'Edit' button. Below it is a search bar labeled 'Function Name'. A table lists three functions:

Function Name	Function Description
Create IT-SOA Addendum (IT-SOA)	Create SOA Addendum Request (IT-SOA Function)
Create IT-SOA Cancellation of Invitation (IT-SOA)	Create SOA Cancellation of Invitation Request (IT-SOA Function)
Create IT-SOA Requisition (IT-SOA)	Create SOA Requisition Request (IT-SOA Function)

(Figure 5-5)

3. Click **Edit** button to modify the default officers for tasks.

The screenshot shows the same configuration interface. The 'Function Name' dropdown is set to 'Create IT-SOA Requisition (IT-SOA)'. Below it is a table for task details:

Task Name	Mandatory	Officer Name	Post Title
Vet Requisition Request	(Max 2)		
Issue Invitation	Yes	Chan Siu Man	CO

(Figure 5-6)

4. Click action button to add / remove the default processing officers / user group.

The screenshot shows the configuration interface with the 'Edit' button at the top right. The 'Function Name' dropdown is still set to 'Create IT-SOA Requisition (IT-SOA)'. The 'Vet Requisition Request' row in the table has an 'Add Officer (Max 2)' link next to the 'Mandatory' column. To the right of the table are two action buttons: a blue square with a person icon and a red circle with a minus sign.

(Figure 5-7)

Button Description

Button	Button Description
	To search officer / group and assign to process the task When the button is clicked, Search User / User Group window pops up. After an officer / a user group searched and selected, the details of information show in the table. For details on search user, please refer to the Section 8.2.
	To remove officer / group from the processing task
Add Officer	To add one more officer for vetting the request task When the link is clicked, a new row will be inserted.

5. Click **Save** button to save the setting. After saved, a successful message will be displayed.

5.3 DEFAULT QUOTATION OPENING TEAM

User may define default quotation opening team for requisition by clicking Default Quotation Opening Team in the left menu. The default quotation opening team will be assigned for requisition creation. To view/modify the Default Quotation Opening Team, please follow the steps below:

1. Click Default Quotation Opening Team in the left menu to view the information

(Figure 5-8)

2. Click **Edit** button to modify the default quotation opening team and click action button to add / remove the quotation opening team member.

(Figure 5-5)

Button Description

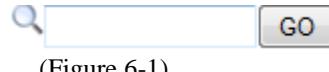
Button	Button Description
	To search officer / group and assign to quotation opening team When the button is clicked, Search User / User Group window pops up. After an officer / a user group searched and selected, the details of information show in the table. For details on search user, please refer to the Section 8.2.
	To remove officer / group from the quotation opening team
Add	To add a team member When the link is clicked, a new row will be inserted.

3. Click **Save** button to save the setting. After saved, a successful message will be displayed.

6. CASE SEARCH AND RELATED FUNCTIONS

6.1 BASIC SEARCH

User may search case using Basic Search function by inputting the whole case number and clicking **GO** button if case number is known. Then, the case will be open in the new tab page.



(Figure 6-1)

6.2 ADVANCED SEARCH

Alternatively, user may perform advanced searching by clicking **Advanced** button. Advanced Search tab page displays.

The screenshot shows the 'Advanced Search' tab selected in the top navigation bar. The main area is titled 'Requisition Search'. It contains two main sections: 'Search Criteria' and 'Search Result'.

Search Criteria:

- Case ID:** 0E314-00067
- Subject:** [dropdown]
- Requisition Type:** SOA Sub Type: All
- Requisition Amount:** To [dropdown]
- Case Creation Date:** 09 Jul 2013 To 09 Jul 2014
- File Ref. No.:** [dropdown]
- Item Description Keyword:** [dropdown]
- Meet Min. No. of Supplier:** All
- Acceptance Criteria:** All Itemised Group Overall
- Assessment:** All Single Envelope Two Envelope
- Officer Involved:** _____

Search Result:

	Case ID	Subject	Type	Requisition Amount	Case Owner	Case Creation Date
[+]	0E314-00067	Purchasing Server with Operating System 2	Network & Server SOA	40,000.00	SM	08 Jul 2014 17:42:13

(Figure 6-2)

Search Criteria - Data Field Description

Field Name	Field Description
Case ID	Case number assigned by the system. It allows keyword search.
Subject	Subject of requisition request. It allows keyword search.
File Ref. No.	Reference number of the case. It allows keyword search.
Requisition Type	Indicate SOA If the radio button clicks, a dropdown Sub Type displays with value All, PC SOA, and Network & Server SOA.
Requisition Amount	Range of estimated purchasing amount of requisition request

Field Name	Field Description
Case Creation Date	Range of case creation date. By default, its range is set to the past 1 year.
Item Description Keyword	Description of purchasing item. It allows keyword search.
Meet Min. No. of Supplier	Meet Min. No. of Supplier (All / Meet Min. Requirement / Not Meet Min. Requirement)
Acceptance Criteria	Acceptance Criteria (All / Itemised / Group / Overall)
Assessment	Assessment (All / Single-Envelope / Two-Envelope)
Officer Involved	<p>Handler of the request</p> <p>User may add officer by clicking Search Officer button. When the button is clicked, Search User window pops up. After an officer searched and selected, the officer name shows. For details on search user, please refer to the Section 8.2</p> <p>Also, user may remove the officer by clicking Clear Officer button</p>

User may choose the action button for further processing.



(Figure 6-3)

Button Description

Button	Button Description
Search	To perform searching based on input criteria.
Reset	To clear the inputted criteria and search result

After **Search** button clicked, a list of result generated and displays in the Search Result section by Case ID. User may click + button to expand or - button to collapse the case details. Also, there are 2 functions (Reassign, and Maintain Quotation Opening Team) available in the Search Result section.

6.2.1 Reassign

In some occasions, the current handler may not be available to handle the request immediately. If necessary, the requestor may reassign the request to another officer to handle. To reassign the request, please follow the steps below:

1. Expand the case by clicking + button in the result and select the request

Search Result						
	Case ID	Subject	Type	Requisition Amount	Case Owner	Case Creation Date
+	0E314-00067	Purchasing Server with Operating System 2	Network & Server SOA	40,000.00	SM	08 Jul 2014 17:42:13

(Figure 6-4)

2. Click **Reassign** button. Search User window pops up. For details on search user, please refer to the Section 8.2.

Search Result						
	Case ID	Subject	Type	Requisition Amount	Case Owner	Case Creation Date
+	0E314-00067	Purchasing Server with Operating System 2	Network & Server SOA	40,000.00	SM	08 Jul 2014 17:42:13
	Requestor	Status	Task	Current Handler	Submission Date	
<input type="checkbox"/>	Requisition	Chan Tai Man	Issued	-	-	08 Jul 2014 17:42:13
<input checked="" type="checkbox"/>	Evaluation	Chan Tai Man	Processing	Download Price Proposal	Chan Chung Man	09 Jul 2014 12:01:40
<input type="checkbox"/>	Clarification	Chan Chung Man	Issued	-	-	-
<input type="checkbox"/>	Clarification	Chan Tai Man	Issued	-	-	-

(Figure 6-5)

3. After an officer searched and selected, a successful message will display and the current handler of the request will be changed.

Search Result						
	Case ID	Subject	Type	Requisition Amount	Case Owner	Case Creation Date
+	0E314-00067	Purchasing Server with Operating System 2	Network & Server SOA	40,000.00	SM	08 Jul 2014 17:42:13
	Requestor	Status	Task	Current Handler	Submission Date	
<input type="checkbox"/>	Requisition	Chan Tai Man	Issued	-	-	08 Jul 2014 17:42:13
<input type="checkbox"/>	Evaluation	Chan Tai Man	Processing	Download Price Proposal	Chan Siu Man	09 Jul 2014 12:01:40
<input type="checkbox"/>	Clarification	Chan Chung Man	Issued	-	-	-
<input type="checkbox"/>	Clarification	Chan Tai Man	Issued	-	-	-

(Figure 6-6)

Notes: Reassign Function also is available in the My Request folder

6.2.2 Maintain Quotation Team Member

Under some situations, the quotation opening team member of the requisition need to change after the invitation of quotation issued and before closing date time. If necessary, the requestor may maintain the quotation team member of the requisition which is under waiting for quotation status. To maintain the quotation team member of the requisition, please follow the steps below:

1. Expand the case by clicking + button in the result and select the request



A screenshot of a search results page titled "Search Result". It displays a single row of data in a table format. The columns are: Case ID (OE314-00070), Subject (Purchasing Server with Operating System 3), Type (Network & Server SOA), Requisition Amount (40,000.00), Case Owner (SM), and Case Creation Date (09 Jul 2014 17:34:37). There are two buttons at the top right of the table: "Reassign" and "Maintain Quotation Opening Team".

(Figure 6-7)

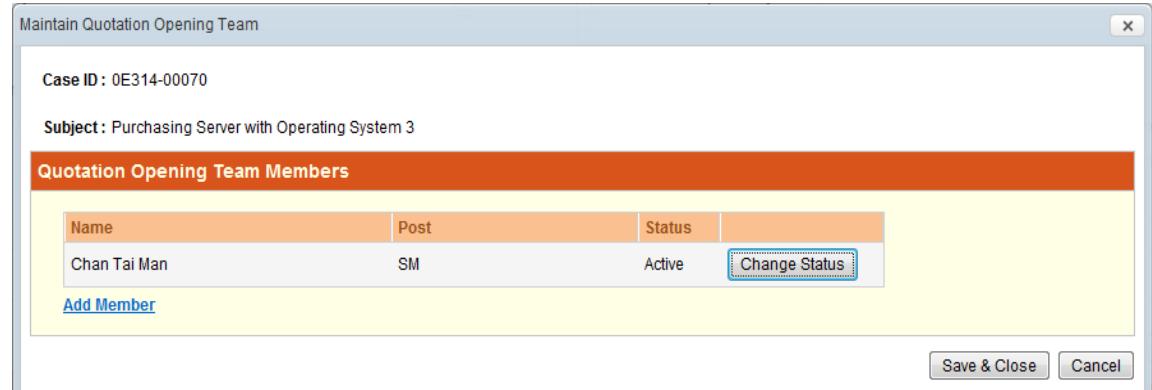
2. Click **Maintain Quotation Team** button. Maintain Quotation Team window pops up.



A screenshot of the "Maintain Quotation Team" window. It shows the same requisition record as Figure 6-7, but with more detailed information expanded. The "Requestor" row shows Chan Tai Man. The "Requisition" row shows "Issued". The "Current Handler" and "Submission Date" fields are also visible. The window has the same "Reassign" and "Maintain Quotation Opening Team" buttons at the top right.

(Figure 6-8)

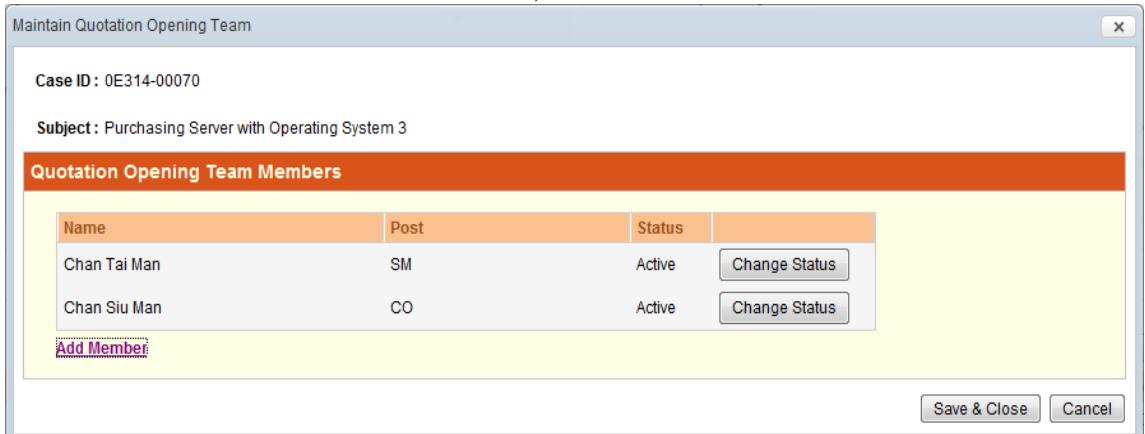
3. Make the opening team member **Active / Inactive** by clicking **Change Status** button



A screenshot of the "Maintain Quotation Opening Team" dialog box. It contains the following fields:
 - Case ID: 0E314-00070
 - Subject: Purchasing Server with Operating System 3
 - Quotation Opening Team Members table:
 | Name | Post | Status |
 | Chan Tai Man | SM | Active |
 | Add Member |
 - Buttons at the bottom: Save & Close and Cancel.

(Figure 6-9)

4. Add officer to quotation opening team by clicking **Add Member** button. Search User window pops up. For details on search user, please refer to the Section 8.2. After an officer searched and selected, the officer will be added.



(Figure 6-10)

5. Click **Save & Close** button to save the inputted

Notes: Maintain Open Quotation Team Function also is available in the My Request folder and Quotation Box folder.

6.3 SOA BULK CONTRACT ITEM SEARCH

To facilitate user to have more information on items provided by suppliers under SOA Term Contract, SOA Bulk Contract Item Search function is available in Dashboard tab. To search bulk contract item, please follow the steps below:

1. Click Dashboard tab page

SOA Bulk Contract Item Search	FAQ
Available SOA and term contracts >> More	SOA - FAQ

(Figure 6-11)

2. Click SOA Bulk Contract Item Search to show search window

(Figure 6-12)

Data Field Description (Searching Widget)

Field Name	Field Description
SOA Type	SOA Type (All / PC SOA / Network & Server SOA)
Contractor	Name of Contractor is available for selection
UNSPSC Code	United Nations Standard Products and Services Code. It allows keyword search
Item No	Number of item. It allows keyword search.
Item Description	Description of Item. It allows keyword search.
Manufacturer	Name of manufacturer of the item. It allows keyword search.

Button Description (Searching Widget)

Button	Button Description
Search	To perform searching of contract items based on input criteria.
Reset	To clear the inputted criteria and search result

After **Search** button clicked, a list of result generated and displays in the Search Result section. Further filtering on search result is available by inputting keyword in the upper areas of the column heading and clicking **Filter** button. Also, export function is available to export the searching result to Microsoft Excel file format by clicking **Export** button.

Search Result												
											[1 - 20 / 3603]	
Contractor	UNSPSC Code	Item No	Item Description	Manufacturer	Currency	Maint (M1-M3, L0-L3)	Max Unit Rate	Unit	Listed Price	Product Detail		
Automated Systems (HK) Ltd (C0333/2012)	24102001	61004	"CTL C Series 37U Rack-mount Server Enclosure - RoHS compliant Overall size: 600 x 625 x 1835mm (WxDxH)"	CTL	HKD	L0 : - L1 : - L2 : - L3 : -	9,000.000000	Unit	9,000.000000			
Automated Systems (HK) Ltd (C0333/2012)	24102001	61005	"Racksystem - NX Series NX63711 37U Heavy Duty Equipment Rack 600 x 1100mm iRacksystem (WxD), Black color, 1200Kg Static Load"	iRacksystem	HKD	L0 : - L1 : - L2 : - L3 : - M1 : 1.000000 -----	12,000.000000	Unit	12,000.000000			

(Figure 6-13)

Data Field Description (Search Result)

Field Name	Field Description
Contractor	Contractor name with contract number
UNSPSC Code	United Nations Standard Products and Services Code
Item No	Number of item
Item Description	Description of item
Manufacturer	Name of manufacturer of the item.
Currency	Purchasing currency
Maint (M1-M3, L0-L3)	Maintenance scheme
Max Unit Rate	Maximum unit rate for the item
Unit	The unit of item
Listed Price	Listed price of the item

Field Name	Field Description
Product Details	<p>Click  button to view the item details as below:</p> <div data-bbox="516 347 1421 1068" style="border: 1px solid #ccc; padding: 5px;"> <p>View Item Details</p> <p>Model No C6637</p> <p>Product / Service Group Hardware</p> <p>Product / Service CV-A0002</p> <p>Category</p> <p>Product / Service "CTL C Series 37U Rack-mount Server Enclosure - RoHS compliant Overall size: 600 x 625 x 1835mm (W x D x H)"</p> <p>Specification / Qualification</p> <p>Warranty Period 12</p> <p>Miscellaneous Charges -</p> <p>SOA Category 1</p> <p>SOA Category 2</p> <p>Remarks Part Item No.: 61003</p> <p>Annual Maintenance -</p> <p>Charge (Software)</p> <p>Base Subscription Period</p> <p>Maintenance Frequency per Year</p> <p>Duration of Each Maintenance Session (Hours)</p> <p>Expected Life Span</p> <p>Unit Rate A1 : 9,000.000000 A2 : 9,000.000000 B1 : 9,000.000000 B2 : 9,000.000000</p> </div>

Button Description (Search Result)

Button	Button Description
Filter	To filter the contract item based on filtering criteria. The result will be displayed under search result.
Export	To export the search result to Microsoft Excel file format.

7. CASE ADMINISTRATION

7.1 BLOCK USER HANDLED CASE ADMIN

In case the handler is not appropriate to access the case anymore, the case owner may remove access right for the handler from the case. To perform the function, please follow the steps below:

1. Click Administration in the pop-up menu and click Block User Handled Case Admin.



(Figure 7-1)

2. Block User Handled Case Admin tab displays

Case ID	Case Subject	Procurement Type	Case Creator	Case Creator Post Title
0E314-00070	Purchasing Server with Operating System 3	SOA	Chan Tai Man	SM
0E314-00069	Testing	SOA	Chan Tai Man	SM
0E314-00068	testing	SOA	Chan Chung Man	AP
0E314-00067	Purchasing Server with Operating System 2	SOA	Chan Tai Man	SM
0E314-00066	Purchasing Server with Operating System 1	SOA	Chan Tai Man	SM
0E314-00065	Purchase Notebook with Operating System 3	SOA	Chan Tai Man	SM
0E314-00064	Purchase Notebook with Operating System 2	SOA	Chan Tai Man	SM
0E314-00063	Purchase Notebook with Operating System 1	SOA	Chan Tai Man	SM

User ID	User Name	Rank	Post Title	Block?	Last Updated Date
---------	-----------	------	------------	--------	-------------------

(Figure 7-2)

3. Select a case in My Case List and all handlers of the case show in Case Handled By section

The screenshot shows a web-based application interface. At the top, there's a header bar with icons for search and refresh. Below it is a table titled 'My Case List' with columns: Case ID, Case Subject, Procurement Type, Case Creator, and Case Creator Post Title. The table contains several rows of data. Below this table is another section titled 'Case Handled By' with columns: User ID, User Name, Rank, Post Title, Block?, and Last Updated Date. It lists two users: tmchan and cmchan, each with their respective details and edit/cancel buttons.

Case ID	Case Subject	Procurement Type	Case Creator	Case Creator Post Title
0E314-00070	Purchasing Server with Operating System 3	SOA	Chan Tai Man	SM
0E314-00069	Testing	SOA	Chan Tai Man	SM
0E314-00068	testing	SOA	Chan Chung Man	AP
0E314-00067	Purchasing Server with Operating System 2	SOA	Chan Tai Man	SM
0E314-00066	Purchasing Server with Operating System 1	SOA	Chan Tai Man	SM
0E314-00065	Purchase Notebook with Operating System 3	SOA	Chan Tai Man	SM
0E314-00064	Purchase Notebook with Operating System 2	SOA	Chan Tai Man	SM
0E314-00063	Purchase Notebook with Operating System 1	SOA	Chan Tai Man	SM

Case Handled By						
User ID	User Name	Rank	Post Title	Block?	Last Updated Date	
tmchan	Chan Tai Man	SM	SM	No	09 Jul 2014 16:53:49	
cmchan	Chan Chung Man	AP	AP	No	09 Jul 2014 15:26:54	

(Figure 7-3)

If the access right for the handler has granted, **No** will shows under Blocked column. Otherwise, **Yes** will shows.

4. Click button to edit the access right for corresponding handler

The screenshot shows a table titled 'Case Handled By' with columns: User ID, User Name, Rank, Post Title, Block?, and Last Updated Date. The 'Block?' column contains radio buttons for 'Yes' and 'No'. The table lists two users: tmchan and cmchan. To the right of the table are edit and cancel buttons.

User ID	User Name	Rank	Post Title	Block?	Last Updated Date	
tmchan	Chan Tai Man	SM	SM	No	09 Jul 2014 16:53:49	
cmchan	Chan Chung Man	AP	AP	<input type="radio"/> Yes <input checked="" type="radio"/> No	09 Jul 2014 15:26:54	

(Figure 7-4)

Click **No** to grant or **Yes** to remove the access right for the corresponding handler. Then, click button to save the editing or button to cancel the editing.

5. After saved, the Block column will be updated accordingly.

The screenshot shows the same 'Case Handled By' table as Figure 7-4, but the 'Block?' column for cmchan now shows 'Yes' instead of 'No', indicating the change was saved successfully.

User ID	User Name	Rank	Post Title	Block?	Last Updated Date	
tmchan	Chan Tai Man	SM	SM	No	09 Jul 2014 16:53:49	
cmchan	Chan Chung Man	AP	AP	Yes	09 Jul 2014 15:26:54	

(Figure 7-5)

7.2 GRANT CASE ACCESS RIGHT

If an officer (not the handler) has to access the case for operational needs, the case owner may grant access right of the case to the officer. To perform the function, please follow the steps below:

1. Click Administration in the pop-up menu, and click Grant Case Access Right.



(Figure 7-6)

2. Grant Case Access Right tab displays

Case ID	Case Subject	Procurement Type	Case Creator	Case Creator Post Title
0E314-00070	Purchasing Server with Operating System 3	SOA	Chan Tai Man	SM
0E314-00069	Testing	SOA	Chan Tai Man	SM
0E314-00067	Purchasing Server with Operating System 2	SOA	Chan Tai Man	SM
0E314-00066	Purchasing Server with Operating System 1	SOA	Chan Tai Man	SM
0E314-00065	Purchase Notebook with Operating System 3	SOA	Chan Tai Man	SM

Case ID	Case Subject	User ID	User Name	Status	Last Updated Date
No records found.					

(Figure 7-7)

3. Select a case in My Case List and all officers (except handlers) have been granted access right of the case shows in Granted Case Access List section

Case ID	Case Subject	Procurement Type	Case Creator	Case Creator Post Title
0E314-00070	Purchasing Server with Operating System 3	SOA	Chan Tai Man	SM
0E314-00069	Testing	SOA	Chan Tai Man	SM
0E314-00067	Purchasing Server with Operating System 2	SOA	Chan Tai Man	SM
0E314-00066	Purchasing Server with Operating System 1	SOA	Chan Tai Man	SM
0E314-00065	Purchase Notebook with Operating System 3	SOA	Chan Tai Man	SM

Case ID	Case Subject	User ID	User Name	Status	Last Updated Date
No records found.					

(Figure 7-8)

If the access right for the officer has granted, **Grant** will shows under Status column. Otherwise, **Revoke** will show.

4. Clicked  button to grant access right of the case to an officer, then Search User window pops up. For details on search user, please refer to the Section 8.2. After an officer searched and selected, the office name shows in the Granted Case Access List with **Grant** status.



Case ID	Case Subject	User ID	User Name	Status	Last Updated Date
0E314-00066	Purchasing Server with Operating System 1	cmchan	Chan Chung Man	Grant	09 Jul 2014 18:14:37

(Figure 7-9)

5. Click  button to edit the access right for corresponding officer.



Case ID	Case Subject	User ID	User Name	Status	Last Updated Date
0E314-00066	Purchasing Server with Operating System 1	cmchan	Chan Chung Man	<input checked="" type="radio"/> Grant <input type="radio"/> Revoke	09 Jul 2014 18:14:37

(Figure 7-10)

Click **Grant** to grant or **Revoke** to remove the access right for the corresponding officer. Then, click  button to save the editing or  button to cancel the editing.

6. Click  button to remove the access right for the officer and a confirmation message display to confirm the removing. Then, the officer is removed from the Grant Case Access List.

7.3 TRANSFER CASE OWNER

In some occasions, the case owner need to transfer case ownership to another officer (e.g. the case owner is going to post out). To perform the function, please follow the steps below:

1. Click Administration in the pop-up menu and click Transfer Case Owner



(Figure 7-11)

2. Transfer Case Owner tab displays with all cases owned by the user in Case List.

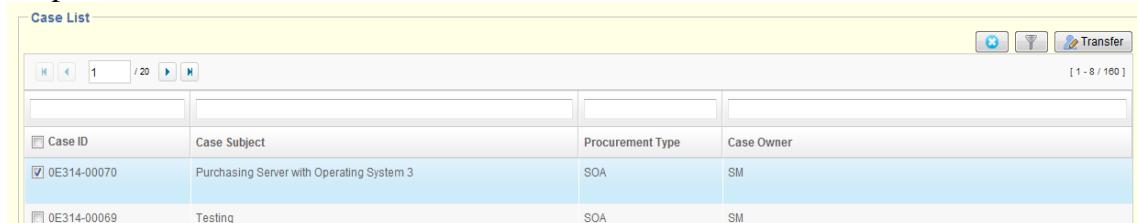
Case ID	Case Subject	Procurement Type	Case Owner
0E314-00070	Purchasing Server with Operating System 3	SOA	SM
0E314-00069	Testing	SOA	SM
0E314-00068	testing	SOA	AP
0E314-00067	Purchasing Server with Operating System 2	SOA	SM
0E314-00066	Purchasing Server with Operating System 1	SOA	SM
0E314-00065	Purchase Notebook with Operating System 3	SOA	SM
0E314-00064	Purchase Notebook with Operating System 2	SOA	SM
0E314-00063	Purchase Notebook with Operating System 1	SOA	SM

(Figure 7-12)

Input Case ID or select Case Owner in Search Case section to perform case searching by clicking **Search Case** button if necessary.

Input case information in the upper areas of column heading to perform filtering by clicking button if necessary. Click to clear case information from the upper areas of column heading.

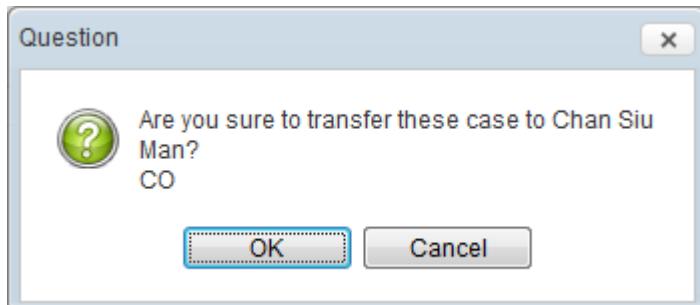
3. Select the case and click **Transfer** button to transfer the case ownership to another officer, then Search User window pops up. For details on search user, please refer to the Section 8.2.



Case ID	Case Subject	Procurement Type	Case Owner
0E314-00070	Purchasing Server with Operating System 3	SOA	SM
0E314-00069	Testing	SOA	SM

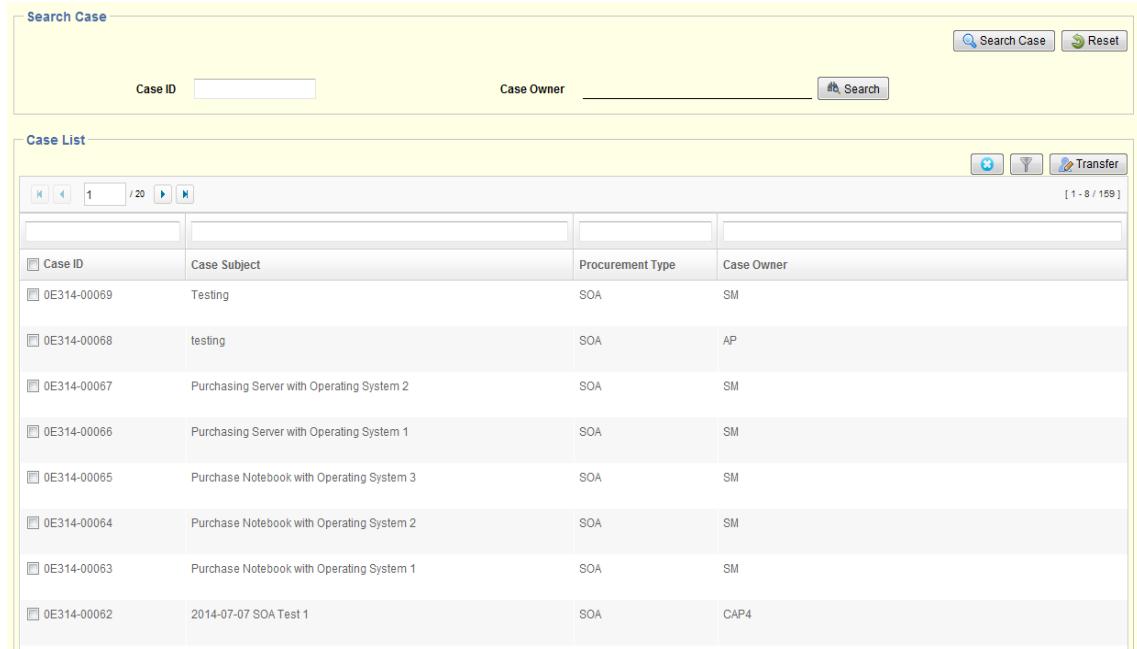
(Figure 7-13)

4. After an officer searched and selected, a confirmation message displays to confirm the transfer.



(Figure 7-14)

5. After confirmed, the case ownership transferred to another officer and the case removed from the Case List.



Case ID	Case Subject	Procurement Type	Case Owner
0E314-00069	Testing	SOA	SM
0E314-00068	testing	SOA	AP
0E314-00067	Purchasing Server with Operating System 2	SOA	SM
0E314-00066	Purchasing Server with Operating System 1	SOA	SM
0E314-00065	Purchase Notebook with Operating System 3	SOA	SM
0E314-00064	Purchase Notebook with Operating System 2	SOA	SM
0E314-00063	Purchase Notebook with Operating System 1	SOA	SM
0E314-00062	2014-07-07 SOA Test 1	SOA	CAP4

(Figure 7-15)

8. MISCELLANEOUS FUNCTIONS

8.1 MARKING SCHEME

Marking Scheme must be defined in the requisition for two-envelope assessment.

Marking Scheme	
Price Ratio	70 %
Technical Ratio	30 %
Technical Marking Scheme Assessment Criteria	
Company Experience	Maximum Score: 60.0 Passing Score: 30.0
Staff Experience	Maximum Score: 40.0 Passing Score: 20.0
Total:	100.0 50.0
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

(Figure 8-1)

Data Field Description

Field Name	Field Description	
Price Ratio	Price ratio of the assessment Sum of Price Ratio and Technical Ratio must be 100%.	Mandatory
Technical Ratio	Technical ratio of the assessment Sum of Price Ratio and Technical Ratio must be 100%.	Mandatory
Technical Marking Scheme Assessment Criteria	Assessment criteria of technical marking scheme. At least one technical marking scheme assessment criteria must be added	Mandatory
Maximum Score	Maximum score of the assessment criteria	Mandatory
Passing Score	Passing score of the assessment criteria. Total Passing Score must be smaller than or equal to Total Maximum Score	Mandatory

Button Description

Button	Button Description
	To add assessment criteria
	To remove the selected assessment criteria

Button	Button Description
OK	To save the information inputted The system will perform validation on user's inputs.
Cancel	To cancel the information inputted and return to the previous screen

8.2 SEARCH USER FUNCTION

In the system, there are a lot of areas need to find out / locate an officer / user group. Search User function will be involved for searching officer / user group.

Search User tab

Click Search User tab to search an officer

Name	Post Title	Email	Rank
chan2	chan2	chan2	ACO
Chan Chung Man	AP	Bryan CK WONG/OCGIO/HKSARG	AP
Chan Siu Man	CO	bckwong@ocgio.gov.hk	CO
Chan Tai Man	SM	TM Chan/OCGIO/HKSARG	SM
chan3	chan3	chan3	ACO

(Figure 8-2)

Data Field Description (Search User)

Field Name	Field Description
Name	Officer name If “like” selected, keyword search will perform. If “is” selected, exact match will perform.
Post Title	Officer post title If “like” selected, keyword search will perform. If “is” selected, exact match will perform.
Rank	Officer rank
Email	Officer Notes email address

Search User Group tab

Click Search User Group tab to search a user group

The screenshot shows a software interface titled 'Search'. At the top, there are two tabs: 'Search User' and 'Search User Group', with 'Search User Group' being the active tab. Below the tabs is a red header bar labeled 'Searching Criteria'. Underneath is a search form with fields for 'Group Name' (containing 'Vetting') and operators ('like'). There are 'Search' and 'Clear' buttons. Below the search form is a table titled 'Group(s)' with columns 'Name', 'Description', and 'Nature'. One row is visible: 'Vetting Group' with description 'User group for vetting' and nature 'POG'. To the right of this row is a 'Show members' button.

(Figure 8-3)

Data Field Description (Search User Group)

Field Name	Field Description
Group Name / Name	User group name. It allows keyword search.
Description	User group description
Nature	User group nature (e.g. POG means processing group)

Button Description

Button	Button Description
Search	To perform searching on officer or user group based on input criteria. The result will be displayed under Search Result.
Clear	To clear the inputted criteria and search result.

Button	Button Description
Show members	To show members in the group

When **Show members** button clicked, Group Members display as below.

(Figure 8-4)

Data Field Description (Search User Group – Group Members)

Field Name	Field Description
Name	Officer name
Post Title	Officer post title
Email	Officer Notes email address
Rank	Officer rank

8.3 INTERNAL QUERY

The handler may communicate with other handlers within the case through the system by using Internal Query function. To perform the function, please follow the steps below:

8.3.1 Raise Internal Query

1. Select and open a case to show Case Navigation

The screenshot shows the 'EVAL_DETAIL' case navigation window. The left sidebar has 'Case Navigation' with 'Internal Query' selected. The main area shows a response from 'E-SERVICE TESTING COMPANY 1' with details like address, response method, and contact information. At the bottom, there are optional fields for 'Proposal with Sample' and 'P-Card Payment'.

(Figure 8-5)

2. Double click Internal Query from the Case Navigation. The Internal Query page displays as follow

The screenshot shows the 'Internal Query' page within the 'EVAL_DETAIL' case. The left sidebar shows 'Internal Query' selected. The main area has a 'Questions' section with a search bar and buttons for 'All Questions', 'Questions To Me', and 'Replies To Me'. A message at the bottom says 'No Exist Topic for this case. Please add a new Topic.'

(Figure 8-6)

Data Field Description (Internal Query)

Field Name	Field Description
No.	Question No.

Field Name	Field Description
Raised By	Name of the user who raised the question
Date	Date of question raised
Subject of the Question	Subject of the question

Button Description (Internal Query)

Button	Button Description
All Questions	To show all of the questions
Questions To Me	To show the questions raised to me
Replies to Me	To show the questions replied to me
Print All to PDF	To export all the questions in PDF file
Refresh	To refresh the screen
Ask Question	To raise a query

3. Click Ask Question button to raise a query

The screenshot shows a window titled "Ask Question". It contains the following fields:

- To:** Chan Chung Man
- Cc:** (empty)
- Subject:** Clarification
- Details:** Any clarification with suppliers required for this requisition?

At the top right are two buttons: "Send" and "Cancel".

(Figure 8-7)

Data Field Description (Ask Question)

Field Name	Field Description
To	Name of recipient of the query Only the handler is available in the list
Cc	Copy the query to other officer Only the handler is available in the list
Subject	Subject of the question
Details	Content of the question.

Button Description (Ask Question)

Button	Button Description
Send	To deliver the query to To recipient and copy to Cc recipient Also, the To and Cc recipients will be notified by email.
Cancel	To cancel the inputted and close the Ask Question window

4. After the query sent, the Internal Query displays as follow

The screenshot shows the Internal Query interface. At the top, there are tabs for 'EVAL_DETAIL' and 'Internal Query'. Below the tabs, there's a section titled 'Questions' with a question icon. There are three radio button options: 'All Questions' (selected), 'Questions To Me', and 'Replies To Me'. On the right side of the interface are three buttons: 'Print All to PDF', 'Refresh', and 'Ask Question'. The main content area displays a table with four columns: 'No.', 'Raised By', 'Date', and 'Subject of the Question'. A single row is shown, indicating a question raised by 'Chan Tai Man' on '10 Jul 2014 10:55:40' with the subject 'Clarification'.

(Figure 8-8)

8.3.2 Reply Internal Query

1. Repeat Section 8.3.1 Step 1 and 2
2. Click the radio button Questions To Me. The question raised in Section 8.3.1 shows.

This screenshot is similar to Figure 8-8, showing the Internal Query interface. The 'Questions To Me' radio button is now selected. The rest of the interface and the displayed question details remain the same as in Figure 8-8.

(Figure 8-9)

3. Select the question to show the question details

This screenshot shows the 'Details' view for the selected question. It displays the message: 'Chan Tai Man wrote on 10 Jul 2014 10:55:40 sending to Chan Chung Man'. Below this, there's a 'Subject: Clarification' field and a text area asking for 'Any clarification with suppliers required for this requisition?'. A 'Reply' button is located in the top right corner of the details panel.

(Figure 8-10)

4. Click **Reply** button to respond the question

The screenshot shows a 'Reply' dialog box. The 'To' field is populated with 'Chan Tai Man'. The 'Content' area contains the text 'There is no clarification required with the suppliers|'. In the top right corner, there are two buttons: 'Send' with a green envelope icon and 'Cancel' with a red cancel icon.

(Figure 8-11)

Data Field Description (Ask Question)

Field Name	Field Description
To	Name of recipient of the reply Only the handler are available in the list
CC	Copy the reply to other officer Only the handler are available in the list
Content	Content of the reply

Button Description (Ask Question)

Button	Button Description
Send	To deliver the reply to To recipient and copy to Cc recipient Also, the To and Cc recipients will be notified by email.
Cancel	To cancel the inputted and close the Reply window

5. After the reply sent, the Internal Query displays as follow

The screenshot shows the Internal Query interface with the following details:

- Questions Tab:** Shows a single question raised by Chan Tai Man on 10 Jul 2014 at 10:55:40, titled "Clarification".
- Details Section:**
 - Message: *Chan Tai Man wrote on 10 Jul 2014 10:55:40 sending to Chan Chung Man*
 - Subject: *Clarification*
 - Text: *Any clarification with suppliers required for this requisition?*
- Reply Section:**
 - Message: *Chan Chung Man replied to Chan Tai Man on 10 Jul 2014 11:51:41*
 - Text: *There is no clarification required with the suppliers*

(Figure 8-12)

8.3.3 View Reply Details

1. Repeat Section 8.3.1 Steps 1 and 2
2. Click the radio button Replies To Me. The reply in Section 8.3.2 shows.

The screenshot shows the Internal Query interface with the following details:

- Case Navigation:** Shows Internal Query selected.
- Questions Tab:** Shows a single question raised by Chan Tai Man on 10 Jul 2014 at 10:55:40, titled "Clarification".
- Details Section:**
 - Message: *Chan Tai Man wrote on 10 Jul 2014 10:55:40 sending to Chan Chung Man*
 - Subject: *Clarification*
 - Text: *Any clarification with suppliers required for this requisition?*
- Reply Section:**
 - Message: *Chan Chung Man replied to Chan Tai Man on 10 Jul 2014 11:51:41*
 - Text: *There is no clarification required with the suppliers*

(Figure 8-13)

3. Select the question to show the question and reply details

The screenshot shows the Internal Query interface with the following details:

- Case Navigation:** Shows Internal Query selected.
- Questions Tab:** Shows a single question raised by Chan Tai Man on 10 Jul 2014 at 10:55:40, titled "Clarification".
- Details Section:**
 - Message: *Chan Tai Man wrote on 10 Jul 2014 10:55:40 sending to Chan Chung Man*
 - Subject: *Clarification*
 - Text: *Any clarification with suppliers required for this requisition?*
- Reply Section:**
 - Message: *Chan Chung Man replied to Chan Tai Man on 10 Jul 2014 11:51:41*
 - Text: *There is no clarification required with the suppliers*

(Figure 8-14)

4. Click **Reply** button to raise further question on the subject if necessary. Please repeat Section 8.3.2 Step 4.

8.4 COPY REQUISITION

To facilitate user to create a new requisition making reference to the old one, Copy Requisition function is available. To perform the function, please follow the steps below:

1. Double click the record to open the old case in the My Handled Case folder

Case ID	Subject	Type	Case Handled On	Created By	Case Owned By	By Others
0E314-00070	Purchasing Server with Operating System 3	SOA	09 Jul 2014 17:39:42	Chan Tai Man	CO	
0E314-00067	Purchasing Server with Operating System 2	SOA	09 Jul 2014 16:53:49	Chan Tai Man	SM	
0E314-00066	Purchasing Server with Operating System 1	SOA	09 Jul 2014 11:22:57	Chan Tai Man	SM	

(Figure 8-15)

2. Double click Requisition in the Case Navigation

(Figure 8-16)

3. Click **View** button for First issue to retrieve the requisition details in the Requisition Summary.

The screenshot shows a software interface for managing requisitions. On the left, a vertical navigation bar lists 'Case Navigation' items: Internal Query, Requisition (which is selected and highlighted in blue), Evaluation, and Clarification. The main window title is 'EVAL_DETAIL x | REQ_SUMMARY x'. The 'REQ_SUMMARY' tab is active. The screen displays the following details:

- Subject:** Purchasing Server with Operating System 2
- Procurement Type and Amount:** SOA (HKD) \$40,000.00
- Closing Date and Time:** 09 Jul 2014 09:00:00
- Assessment:** Two-Envelope
- Acceptance Criteria:** Overall

Below this, a table provides item details:

Rev No.	Created By	Created Date	Status	
First Issue	Chan Tai Man	08 Jul 2014 17:42:13	Issued	<button>View</button>

(Figure 8-17)

4. Click **Copy As New** button to copy the requisition information.

The screenshot shows a software interface for managing requisitions. On the left, a vertical navigation bar lists 'Case Navigation' items: Internal Query, Requisition (selected and highlighted in blue), Evaluation, and Clarification. The main window title is 'EVAL_DETAIL x | REQ_SUMMARY x | REQ_DETAIL x'. The 'REQ_DETAIL' tab is active. The screen displays the following details:

Basic Information

- Subject:** Purchasing Server with Operating System 2
- SOA Type:** Network & Server SOA - Network Products and Server Systems
- Acceptance Criteria:** Itemised Group Overall
- Assessment:** Single-Envelope Two-Envelope

Declaration

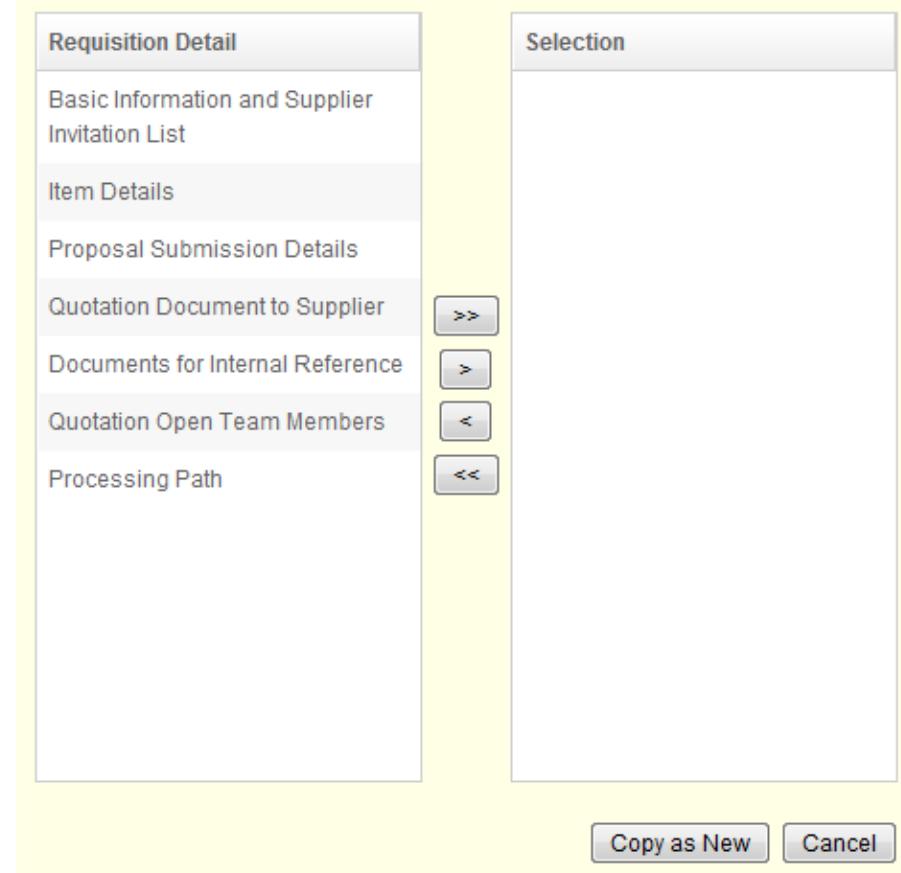
- I declare that there is no conflict of interest in accordance with SPR 185 and 186

Item Details

Item No.	Description	Unit	Qty.
1	Server	Set	1.00
2	Operating System	Set	1.00

(Figure 8-18)

5. A pop-up window displays for selection of the information to be copied.



(Figure 8-19)

Data Field Description

Field Name	Field Description
Requisition Detail - Select Information to be Copied	User may select the following information to be copied: - Basic Information and Supplier Invitation List - Item details - Proposal Submission Details - Quotation Document to Supplier - Documents for Internal Reference - Quotation Open Team Members - Processing Path
Selection	Information selected to be copied:

Input Button Description

Button	Button Description
	To move all requisition details to Selection column
	To move the selected requisition detail to Selection column
	To remove the selected requisition detail from Selection column
	To remove all requisition details from Selection column
Copy As New	To copy the selected requisition details to a new requisition, and the Create Requisition page displays for further processing
Cancel	To cancel the copy operation and back to Requisition Detail page.

6. After selection and **Copy as New** button clicked, SOA Requisition page in Prepare stage displays as follow:

The screenshot shows the SOA Requisition (R003) page in the Prepare stage. The top navigation bar includes Save, Submit, Approval Form for Issuing Invitation, Print to PDF, and a plus sign icon. Below the navigation is a breadcrumb trail: SOA Requisition — Prepare — Vet — Issue. The main content area is divided into sections: Basic Information, Declaration, and Item Details.

Basic Information:

- Subject: [Text input field]
- SOA Type: Network & Server SOA - Network Products and Server Systems
- Acceptance Criteria: Overall (radio button selected)
- Assessment: Two-Envelope (radio button selected)

Declaration:

- I declare that there is no conflict of interest in accordance with SPR 185 and 186

Item Details:

Item No.	Description	Unit	Qty.	Action
1	Server	Set	1.00	
2	Operating System	Set	1.00	

(Figure 8-20)