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.	• 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
6.	Alignment and screen updated with the latest production environment	All Pages	1.6	25 Jul 2014
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

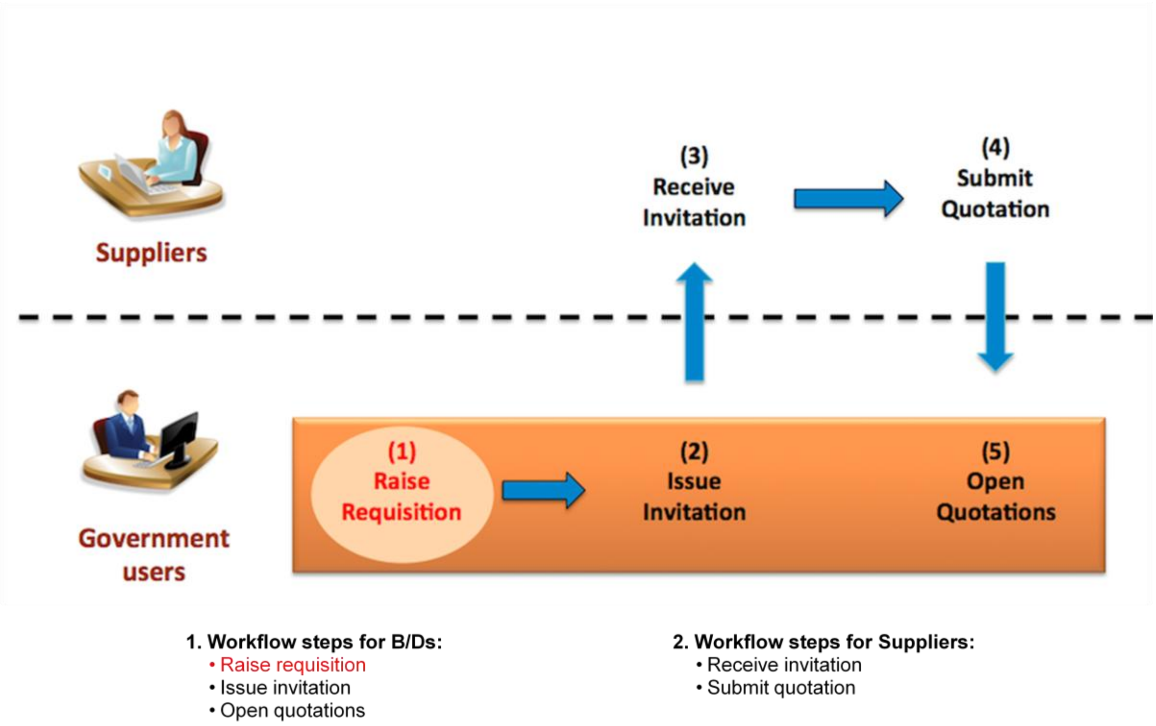
With the endorsement of the E-Government Steering Committee ("EGSC") chaired by the Financial Secretary in March 2012, B/Ds are required to use the IT SOA Function of the e-Procurement Service (e-PS) to procure IT products and services (i.e. Network Products, Server Systems, PC Products and Related Services)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

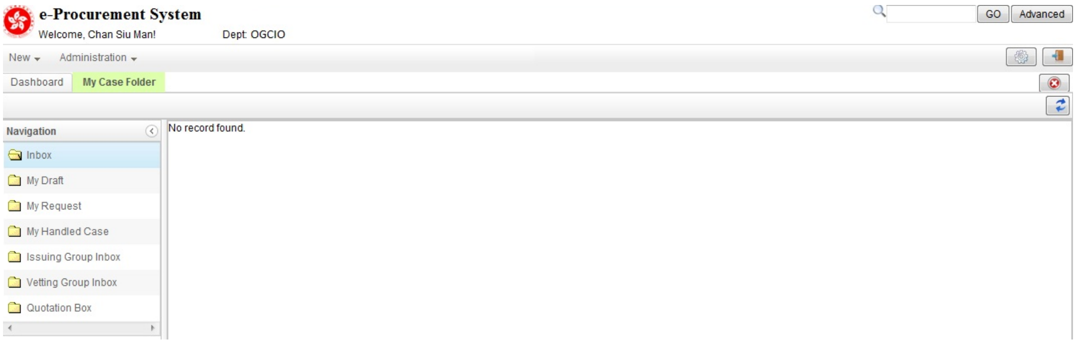
In summary, the IT SOA Function supports sending out invitation and receipt of acquisition proposals as stipulated in the SOA Acquisition Procedures. It is at B/D's discretion to decide the most suitable way of using the IT SOA Function. Since there is no procurement authority validation to check which 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:



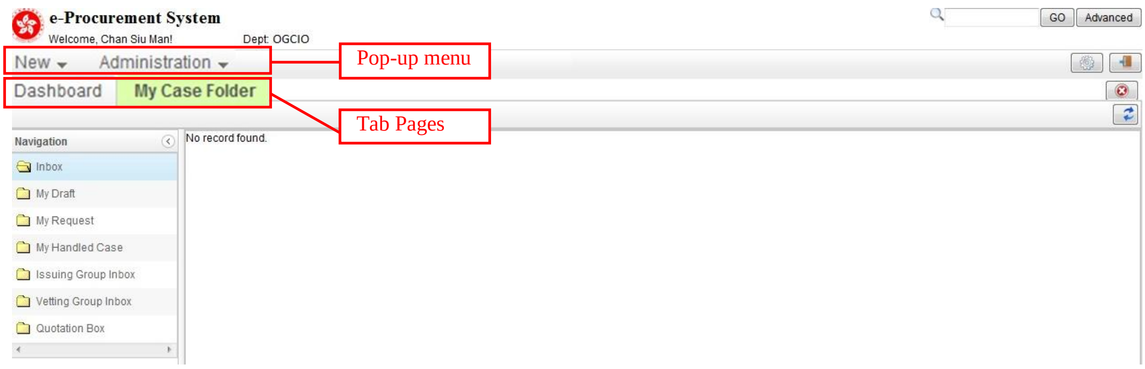
(Figure 3-1)

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

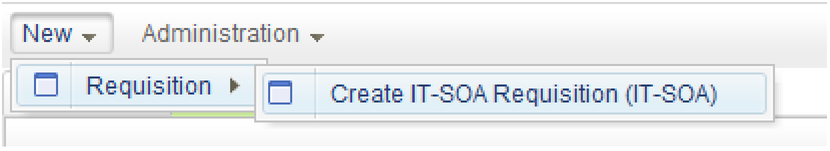
3. Close All Tab - To close all tab pages except Dashboard and My Case Folder tab pages

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

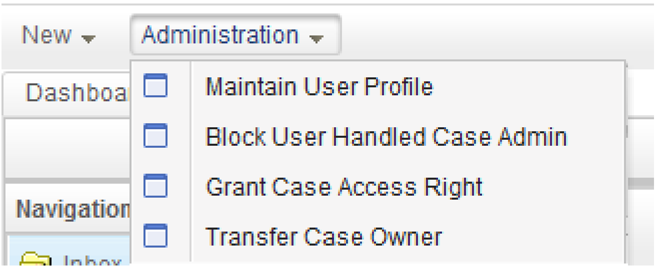


(Figure 3-4)

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



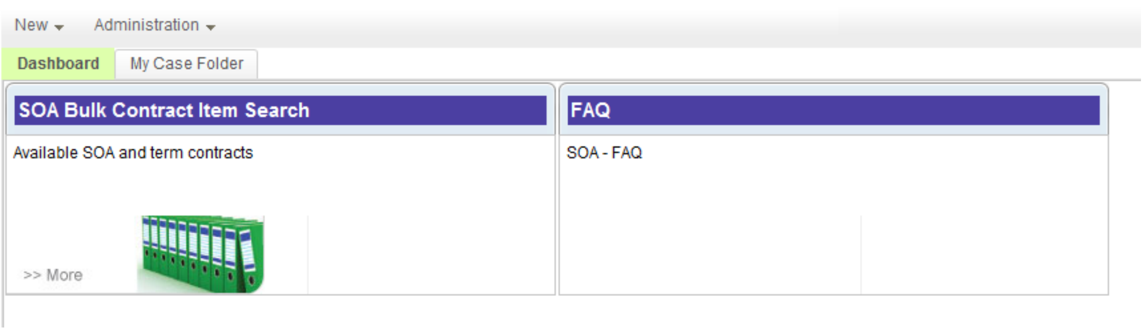
(Figure 3-5)

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

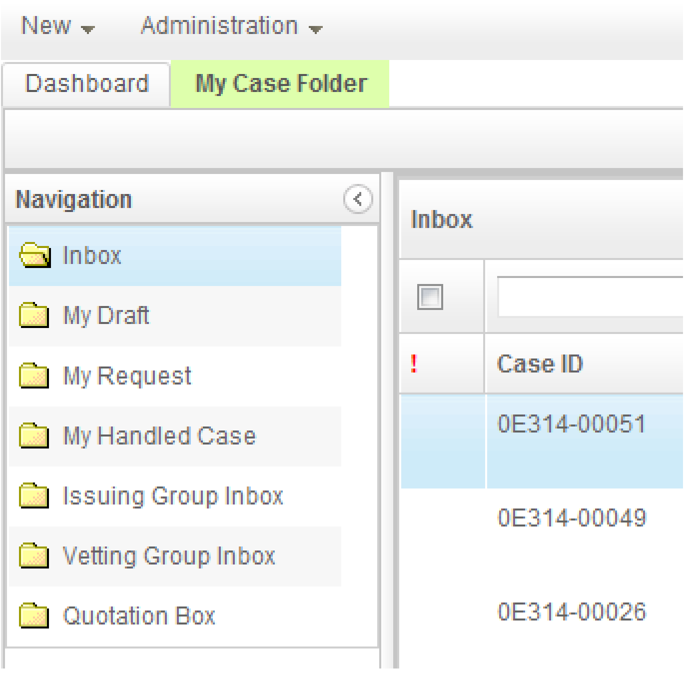


(Figure 3-6)

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



(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?caseId=1070000000000000145&requestId=1070000000000000252

Regards,

e-Procurement System

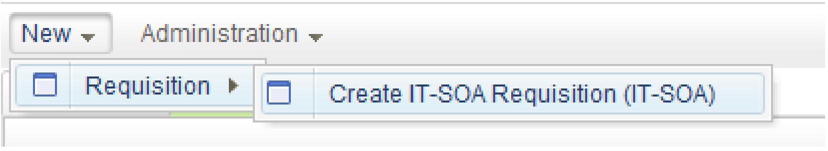
(Figure 3-10)

4. PROCUREMENT WORKFLOW

4.1 SOA REQUISITION REQUEST

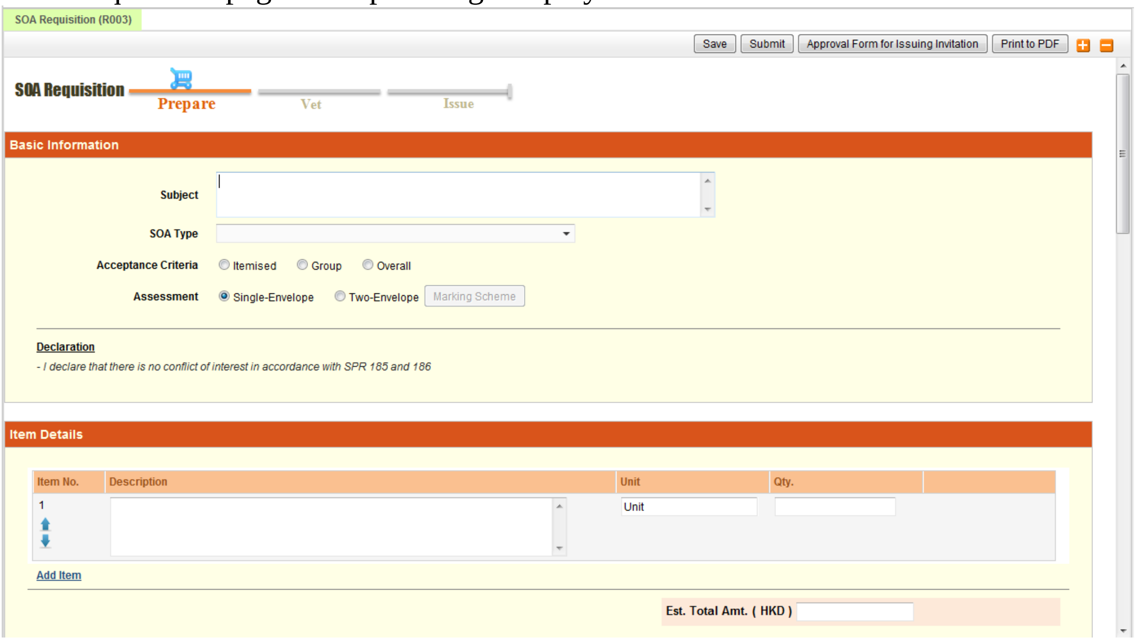
4.1.1 Prepare and Submit Requisition Request

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)**



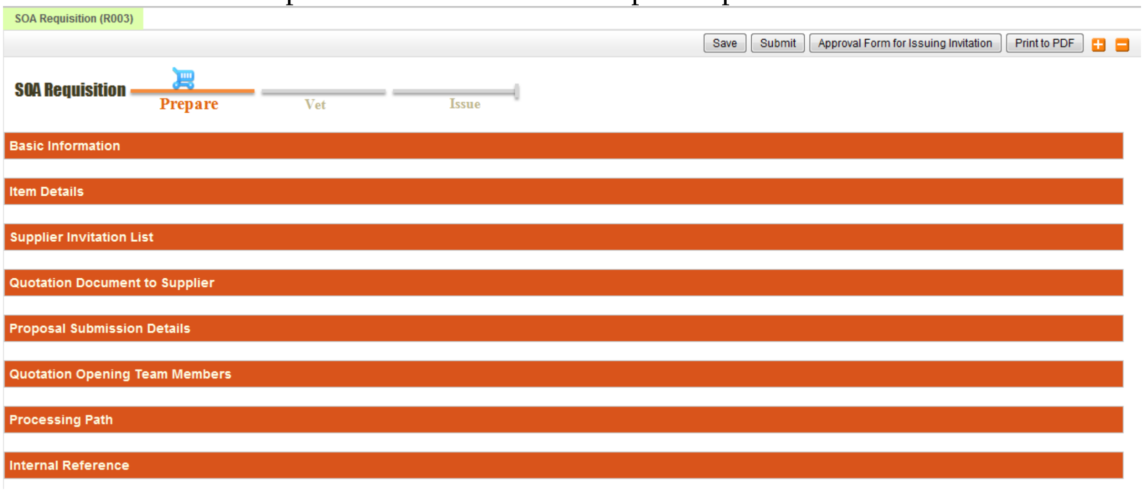
(Figure 4-1)

SOA Requisition page in Prepare stage displays.



(Figure 4-2)

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



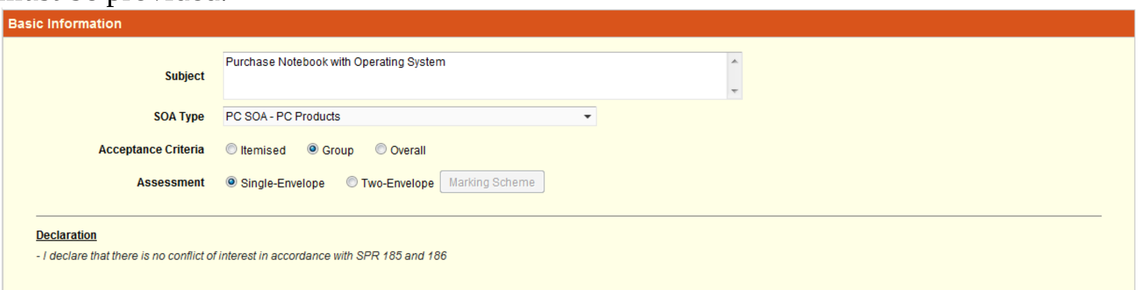
(Figure 4-3)

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.



(Figure 4-4)

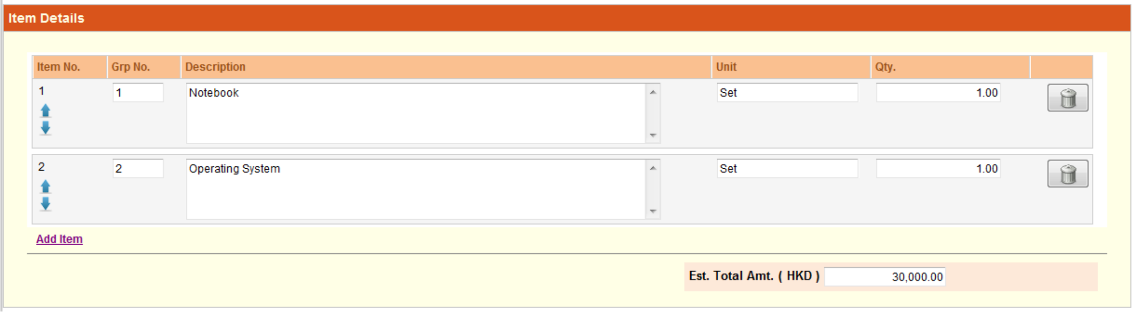
<u>Data Field Description</u>

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

4.1.1.2 Item Details

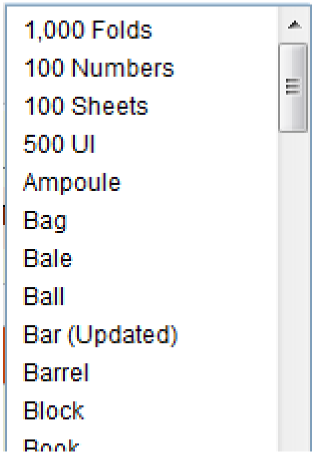
The item details of purchasing products / services (Group No., Description, Unit, Quantity, and Estimated Total Amount) must be provided.



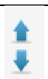
(Figure 4-5)

<u>Data Field Description</u>

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

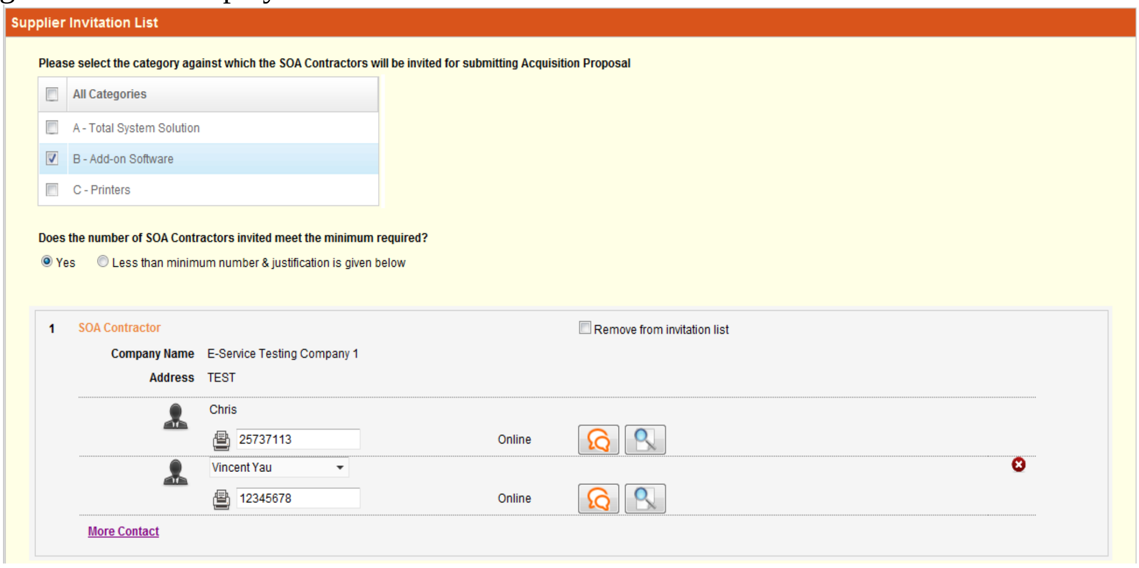
Field Name	**Field Description**	
Unit	Unit of measurement of the item. A list of unit is available for selection. 	Mandatory
Qty.	Quantity of the item	Mandatory
Est. Total Amt.(HKD)	Estimated amount for the requisition request in Hong Kong Dollars in 2-decimal place	Mandatory

Button Description

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

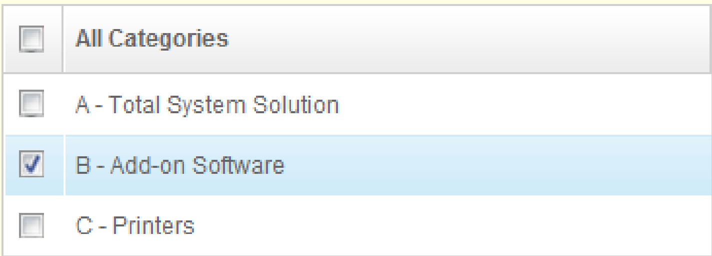
4.1.1.3 Supplier Invitation List

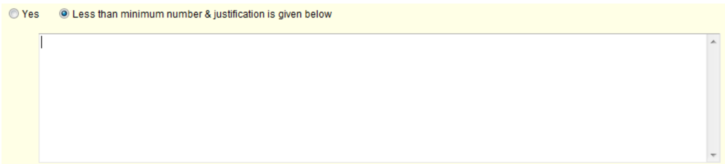
According to the selected SOA Type and Categories, a list of SOA Contractors is generated and displayed.



(Figure 4-6)

<u>Data Field Description</u>

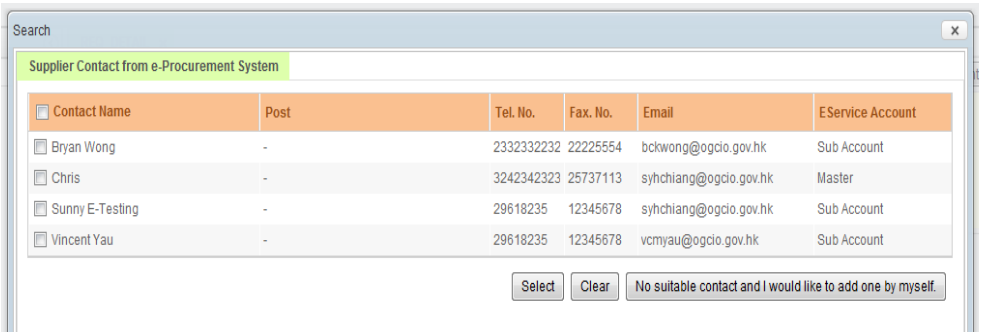
<table>
<tr><th>Field Name</th><th>Field Description</th><th></th></tr>
<tr><td>Please select the category against which the SOA Contractors will be invited for submitting Acquisition Proposal</td><td>To select one or more categories under the SOA Term Contract Type


The available categories depend on the selected SOA Type.</td><td>Mandatory</td></tr>
<tr><td>Does the number of SOA Contractors invited meet the minimum required?</td><td>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.

</td><td>Mandatory</td></tr>
<tr><td>Remove from invitation list</td><td>To remove the selected supplier from the invitation list

When the checkbox is ticked, the contact person information is hidden.</td><td>Optional</td></tr>
</table>

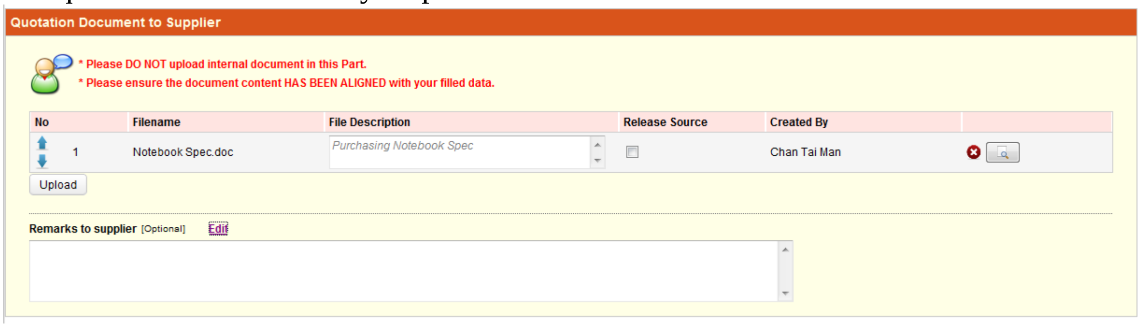
Field Name	Field Description	
	Contact point of invited supplier	Mandatory
	Fax number of the contact point Notes: 1. The format of fax number is in 8-digit without space or starting with '852' followed by 8-digit without space. 2. Checking on fax number against with Do-not-call Register will perform. 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
More Contact	To add contact person for the respective supplier. A pop-up window will be displayed for selection or a new contact creation.  **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.
	To remove the supplier contact person

4.1.1.4 Quotation Document to Supplier

The quotation document may be provided.

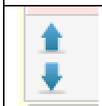


(Figure 4-7)

<u>Data Field Description</u>

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

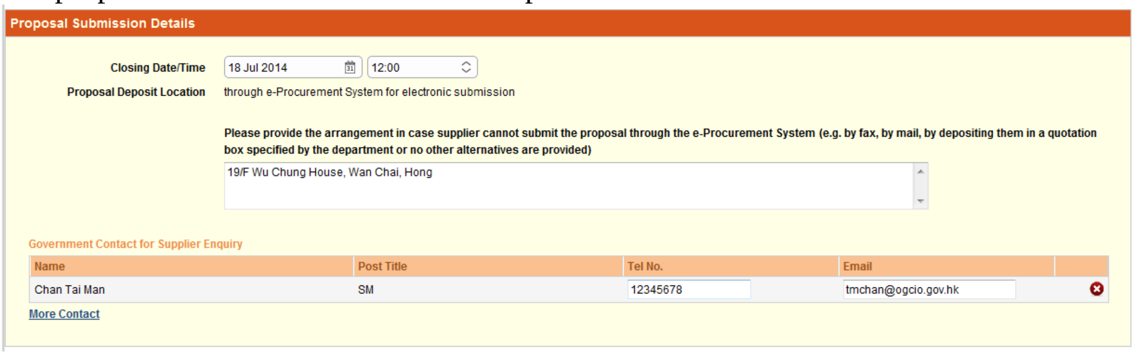
<u>Input Button Description</u>

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.



(Figure 4-8)

<u>Special Arrangement under Bad Weather</u>

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.

<u>Data Field Description</u>

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

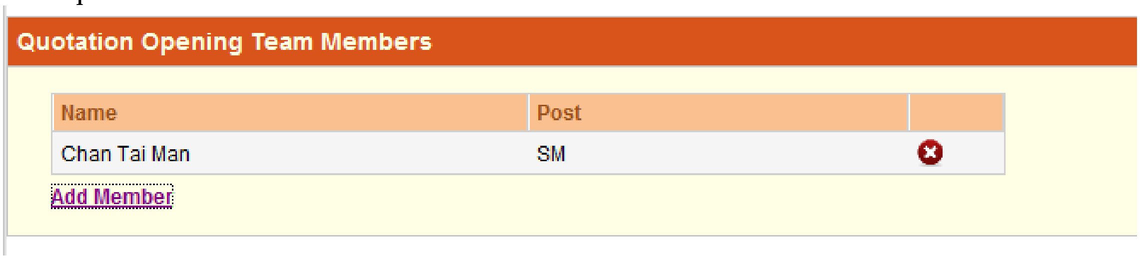
Input Button Description

Button	Description
More Contact	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.



(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
Add Member	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

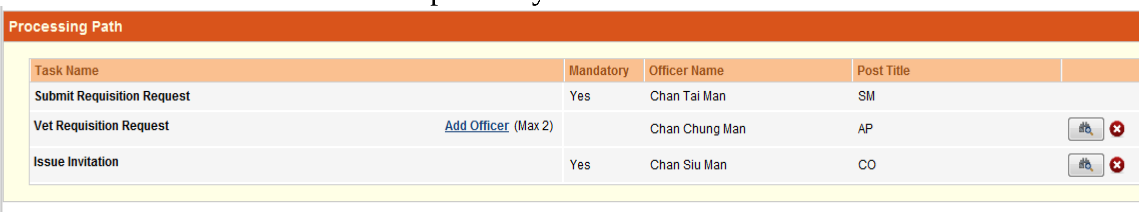
4.1.1.7 Processing Path

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.



(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.

(Figure 4-11)

Data Field Description

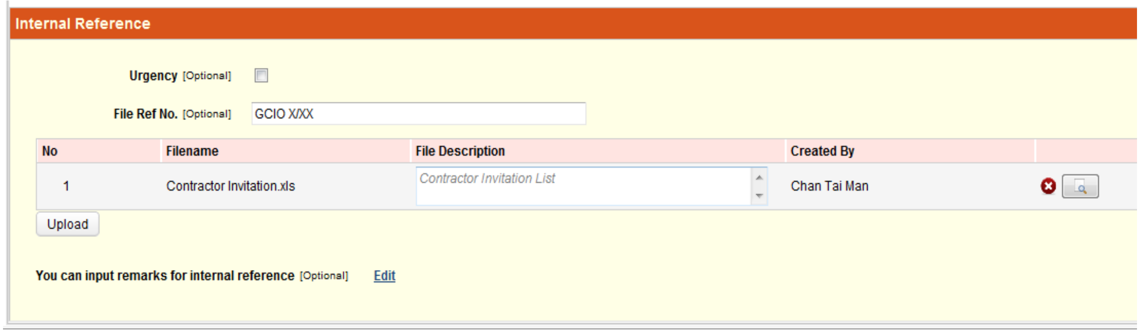
Field Name	Field Description	
Mandatory / Officer Name / Post Title (Submit Requisition Request)	Mandatory: 'Yes' (the task is necessary) The officer submits the requisition request.	Non-Editable
Mandatory / Officer Name / Post Title (Vet Requisition Request)	Mandatory: 'No' (the task is not necessary) 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
Add Officer	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

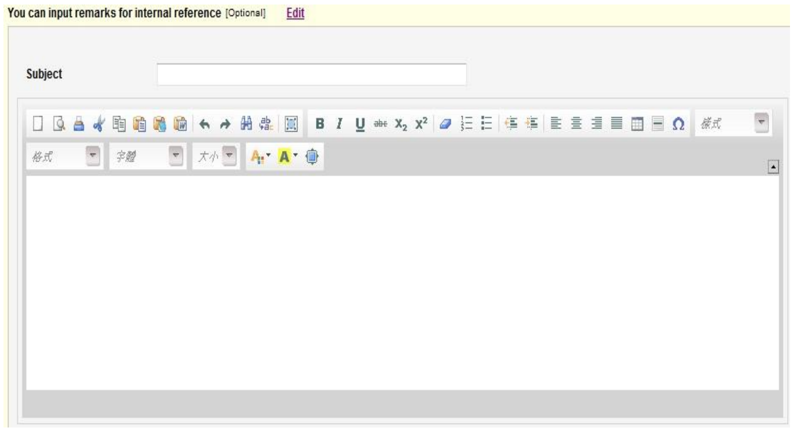
4.1.1.8 Internal Reference

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



(Figure 4-12)

<u>Data Field Description</u>

<table>
<tr><th>Field Name</th><th>Field Description</th><th></th></tr>
<tr><td>Urgency</td><td>Indicate the urgency of the request</td><td>Optional</td></tr>
<tr><td>File Ref No.</td><td>Internal reference number for record</td><td>Optional</td></tr>
<tr><td>Filename</td><td>Display the name of file uploaded to system</td><td>Optional</td></tr>
<tr><td>File Description</td><td>Description of the uploaded file
If the file is uploaded, the file description is mandatory to input.</td><td>Mandatory</td></tr>
<tr><td>You can input remarks for internal reference</td><td>Click <u>Edit</u> link to input the remarks in the editor panel.


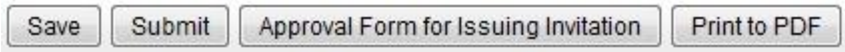
User may input Subject and Details in the panel. The content can be formatted by using the editor features.</td><td>Optional</td></tr>
</table>

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.



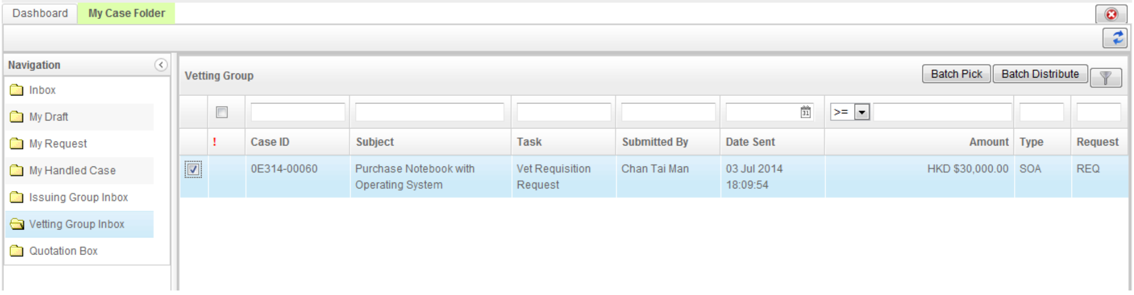
(Figure 4-13)

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.



(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.

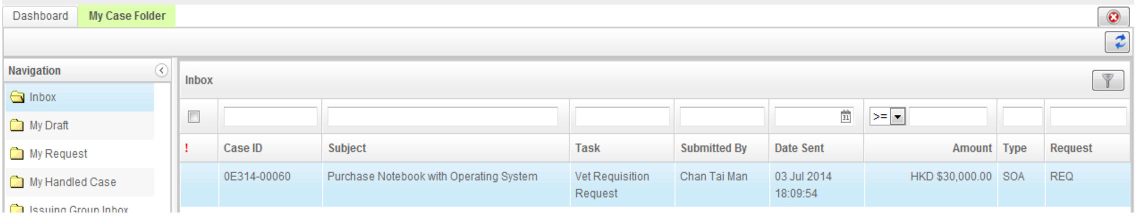
On the other hand, the team member may select the request, and click **Batch Distribute** button to assign another officer to handle the vetting request. Then, the Search User window will pop up for selecting an officer for distribution. For details on search user, please refer to the Section 8.2.

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

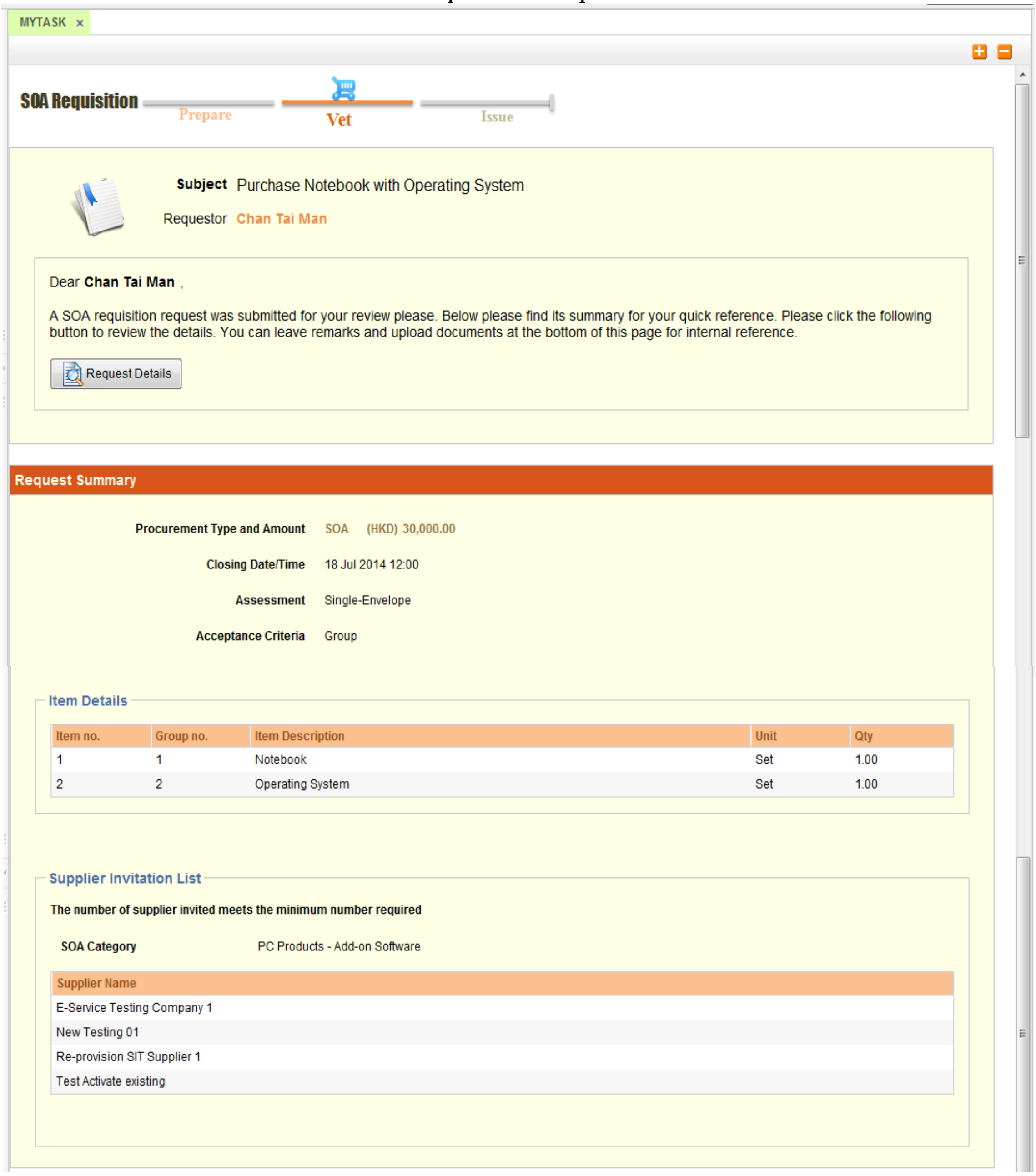
The Vetting Officer may locate the request from the Inbox folder. To perform the vetting, please follow the steps below:

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



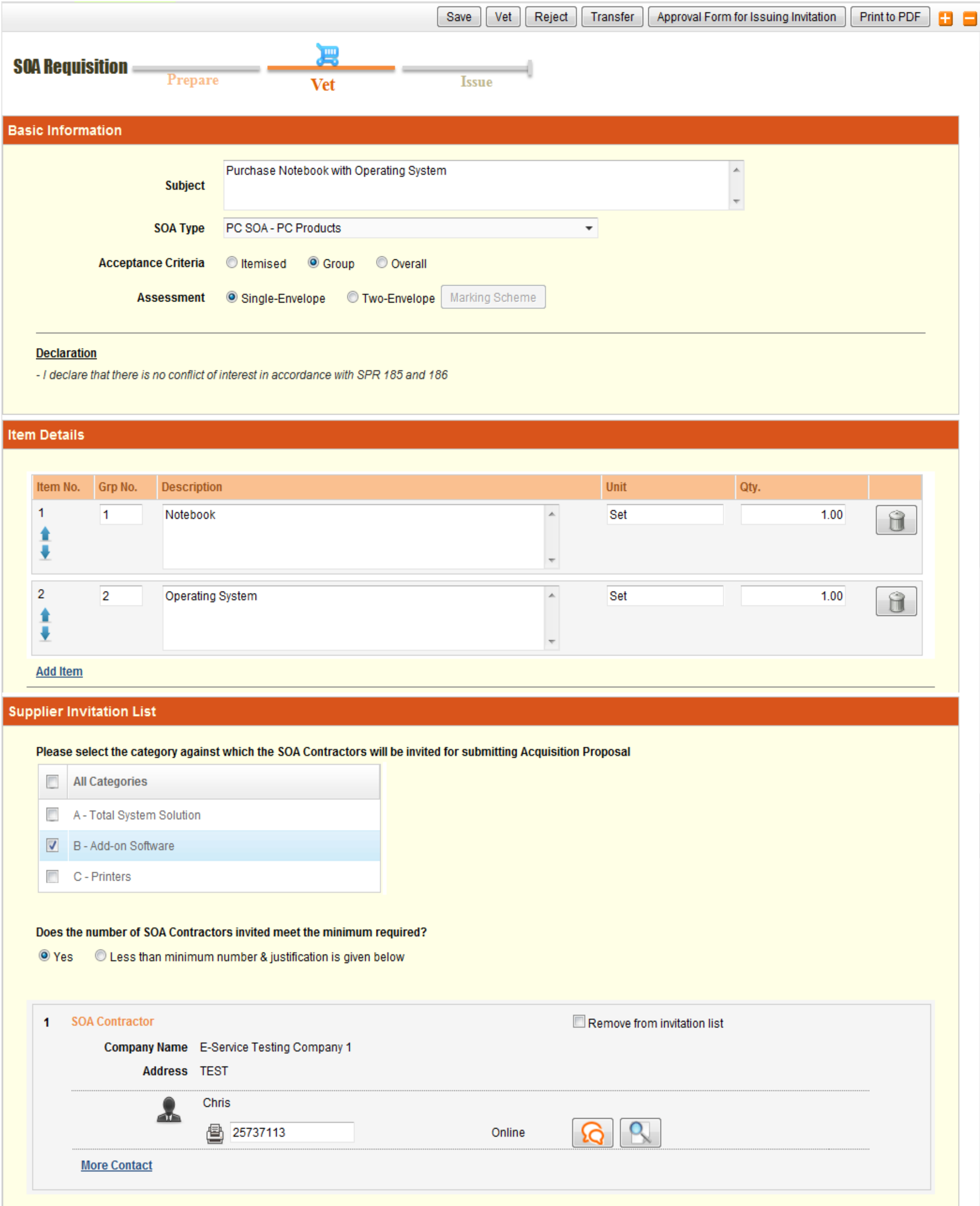
(Figure 4-15)

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

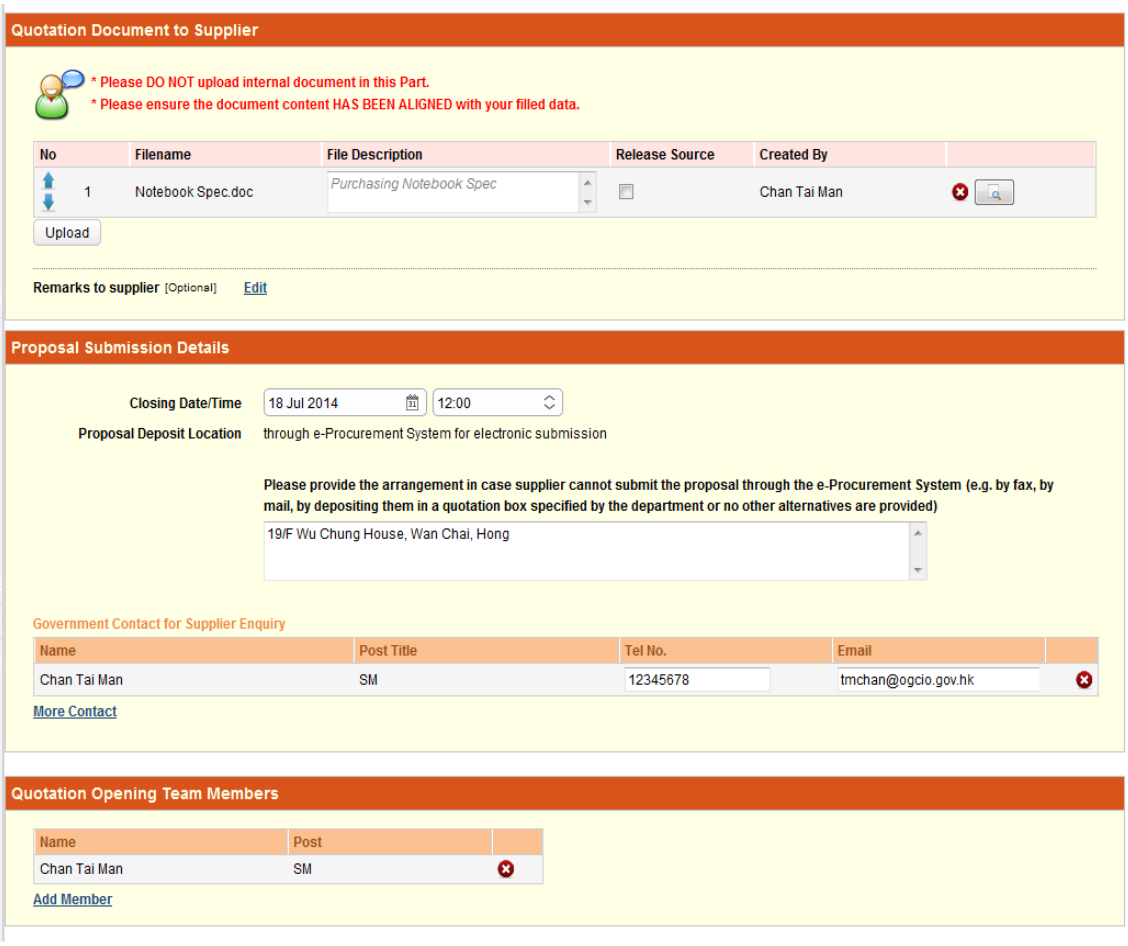


(Figure 4-16)

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.

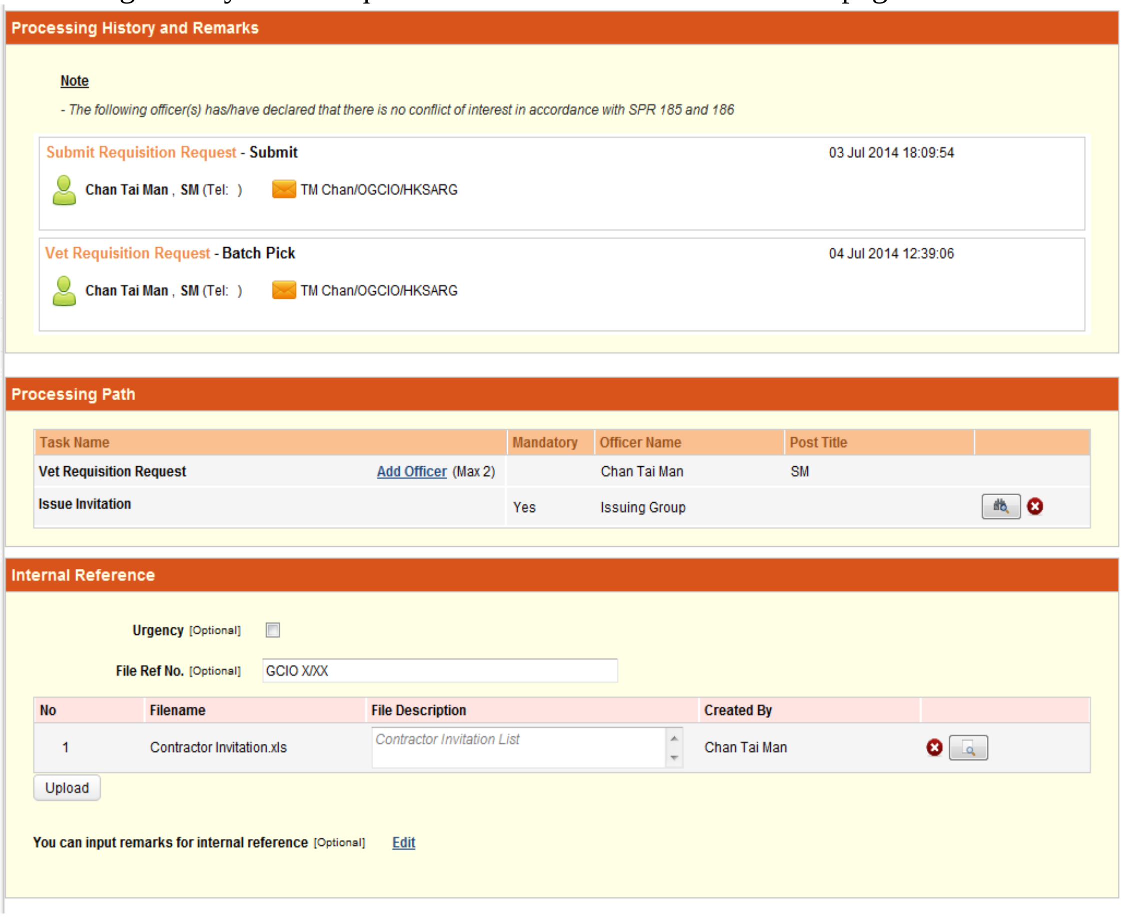


(Figure 4-17)


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
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

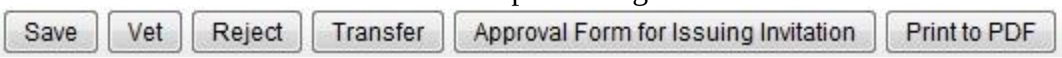
(Figure 4-18)

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



(Figure 4-19)

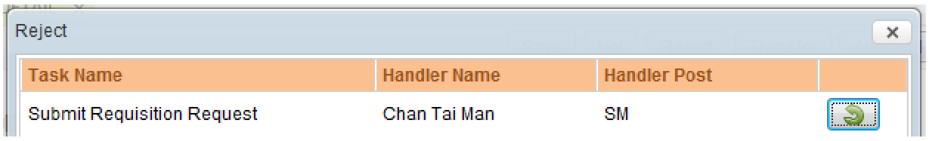
4. Choose the action button for further processing.



(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)

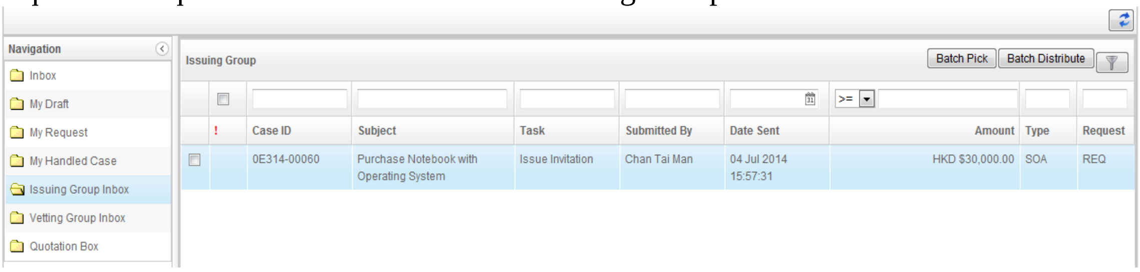
Button Description

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.



(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.

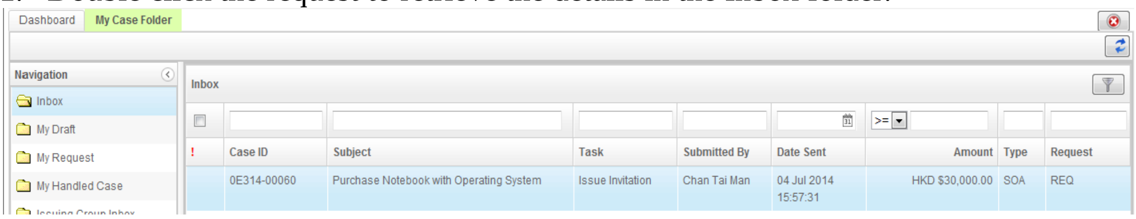
On the other hand, the team member may select the request and click **Batch Distribute** button to assign another officer to handle issuing invitation. Then, the Search User window will pop up for selecting an officer for distribution. For details on search user, please refer to the Section 8.2.

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

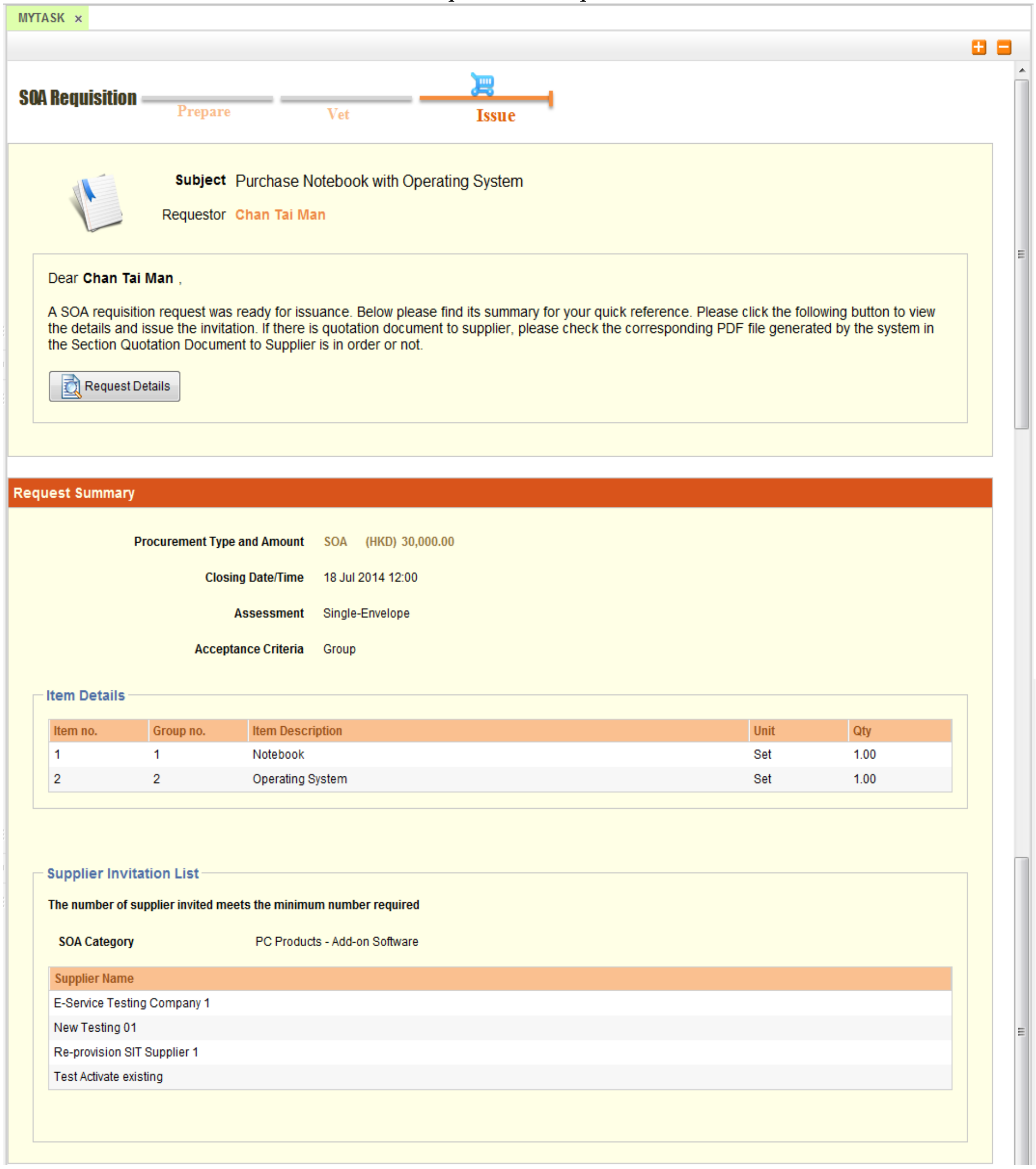
The Issuing Officer may locate the request from the Inbox folder. To perform the invitation issuing, please follow the steps below:

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



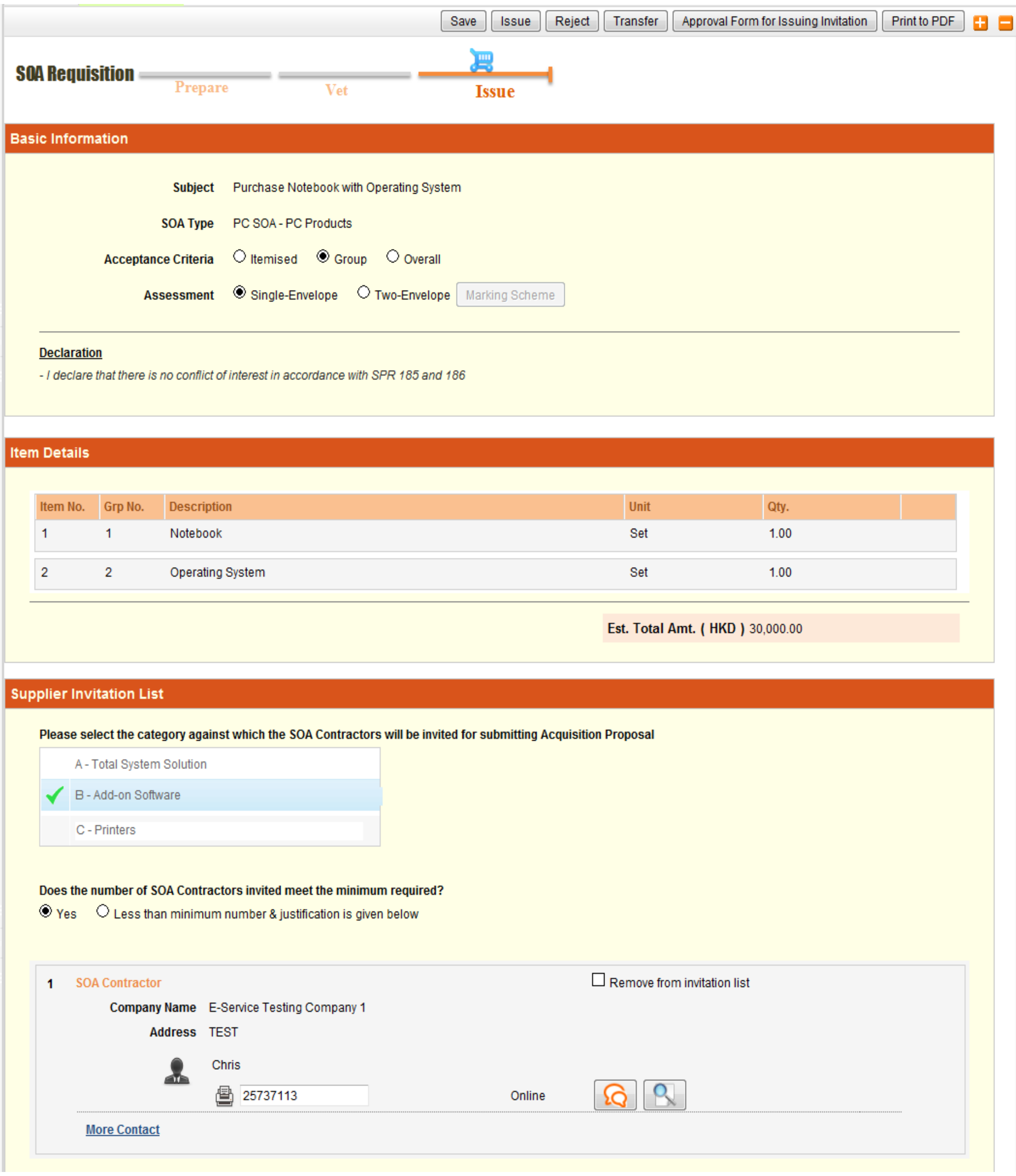
(Figure 4-23)

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



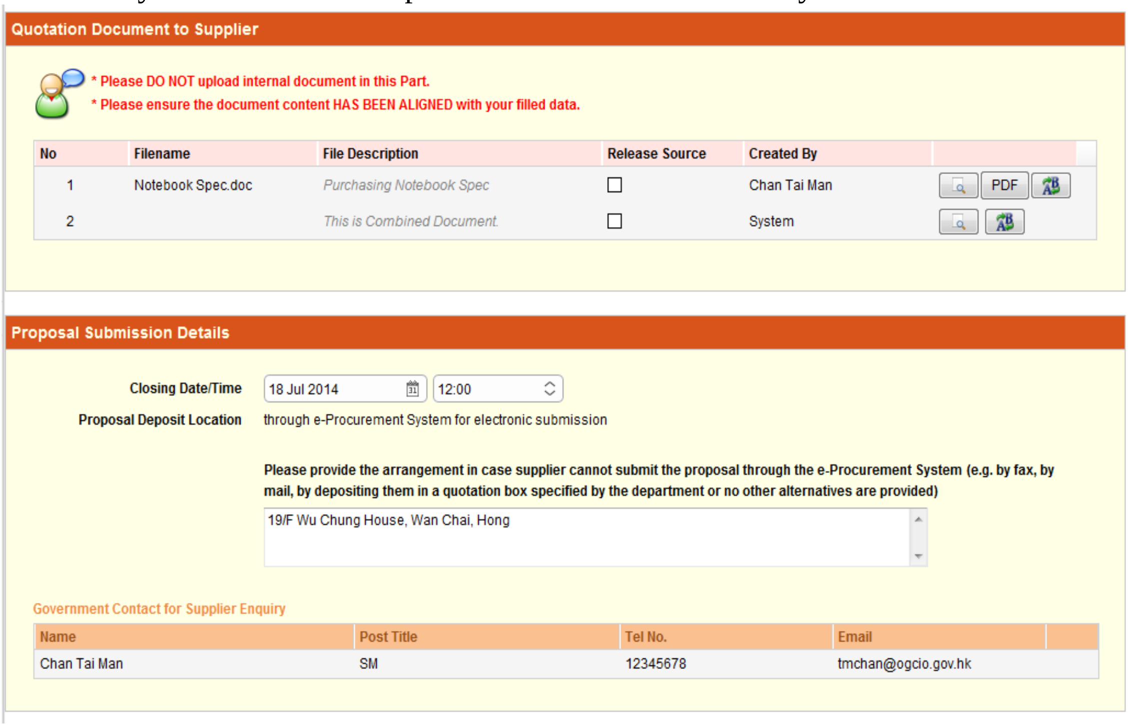
(Figure 4-24)

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.



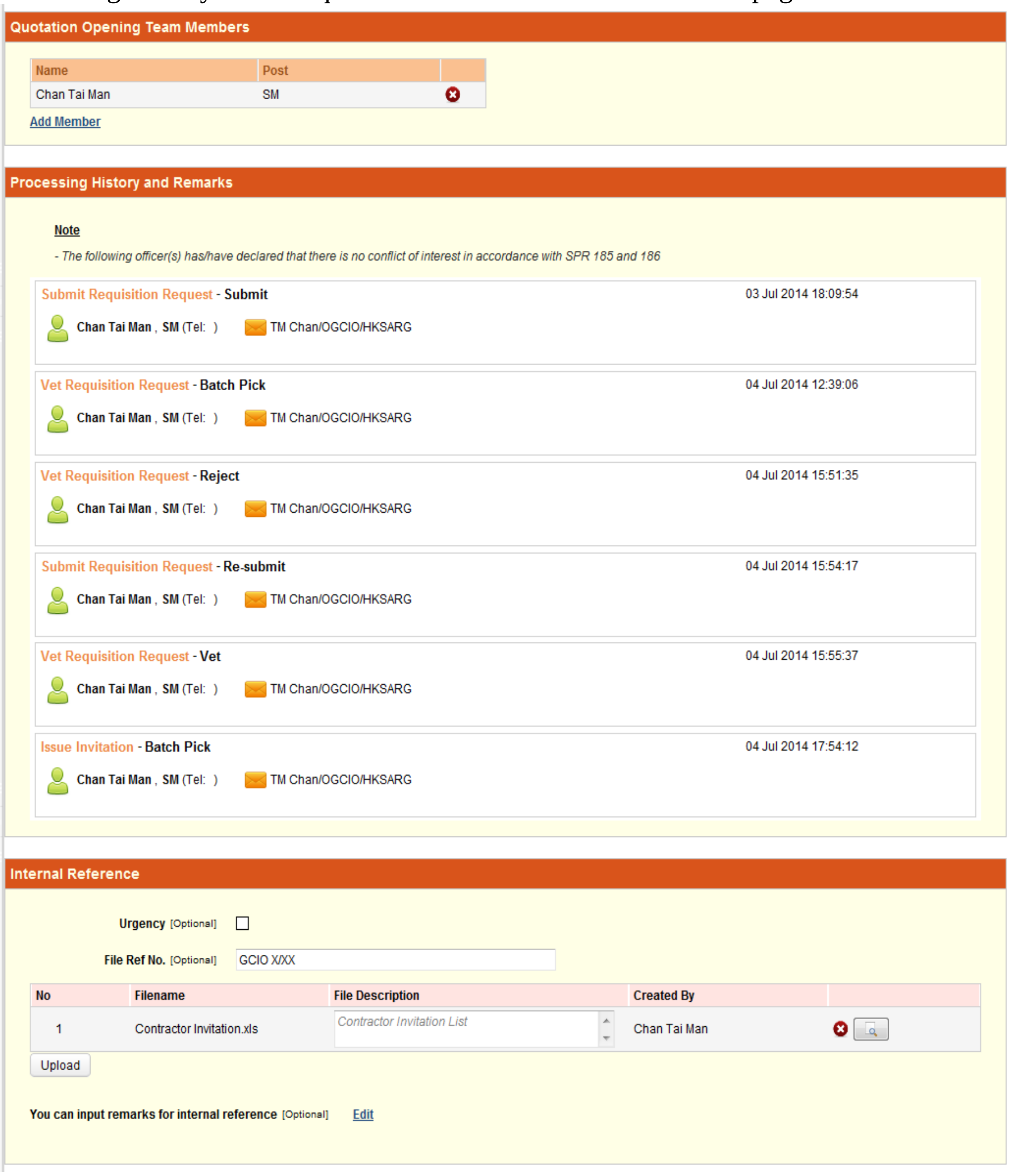
(Figure 4-25

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.



(Figure 4-26)

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

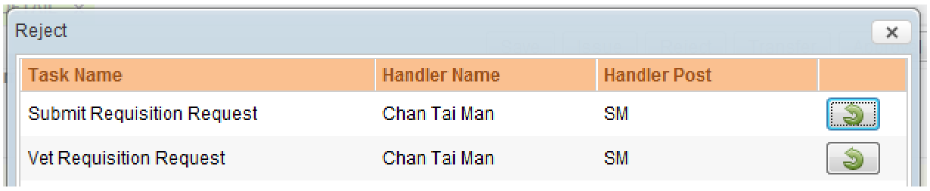


(Figure 4-27)

4. Choose the action button for further processing.

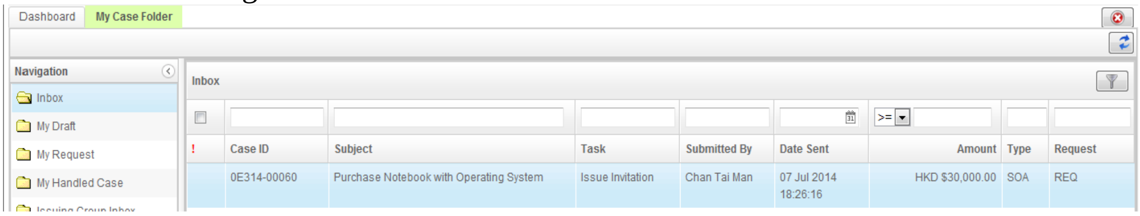
(Figure 4-28)

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.



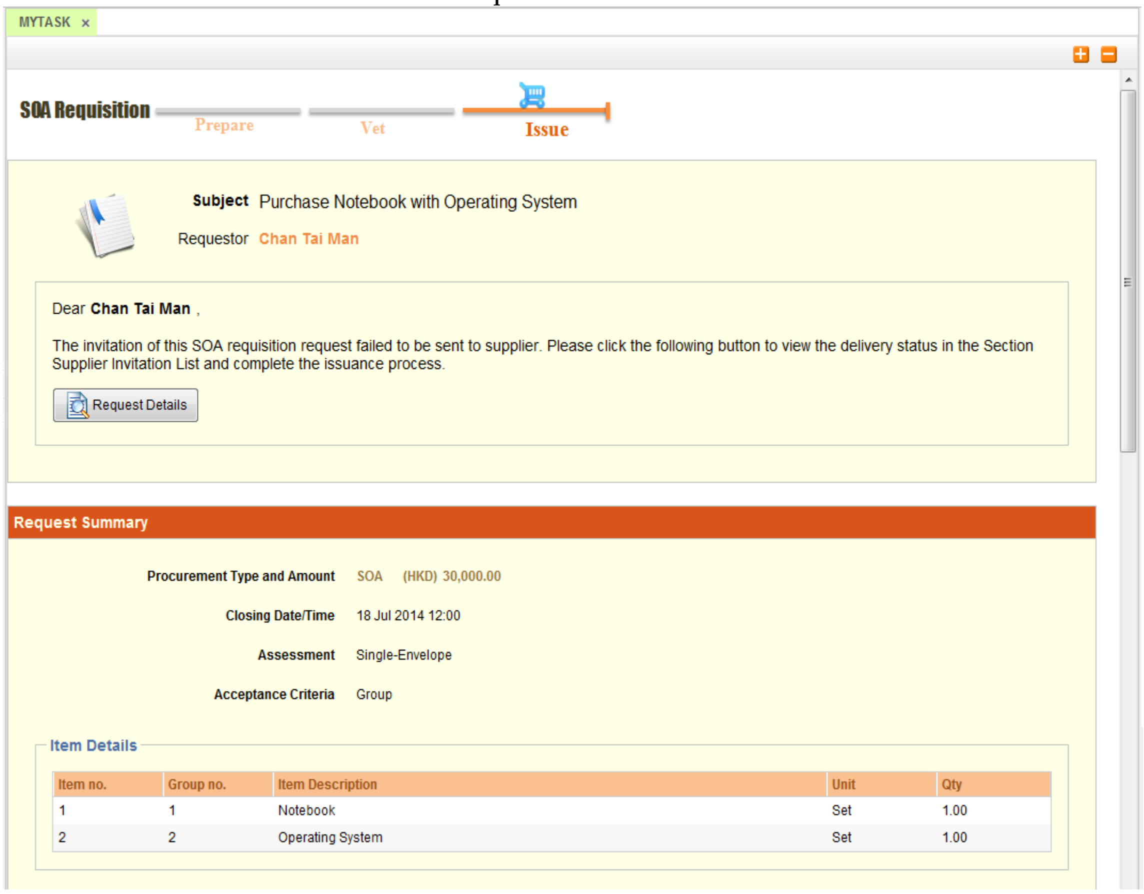
(Figure 4-29)

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:

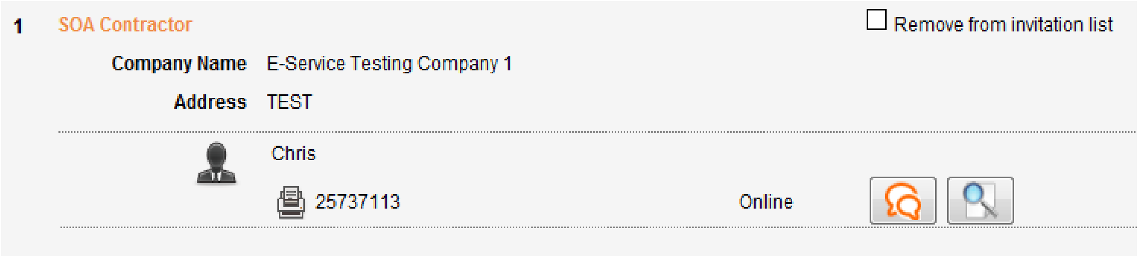
1. Retrieve the request from the Inbox folder by double clicking the request

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



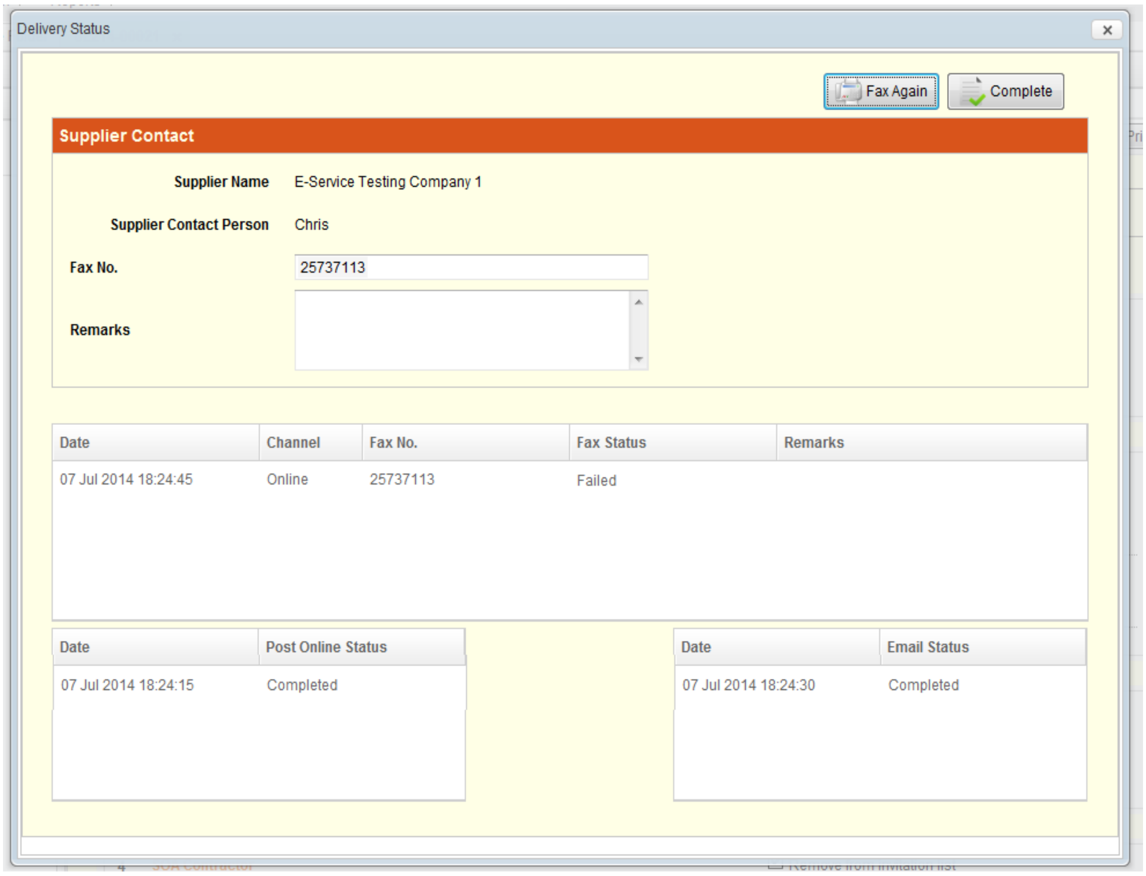
(Figure 4-30)

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



(Figure 4-31)

4. 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.

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

(Figure 4-33)

Button Description

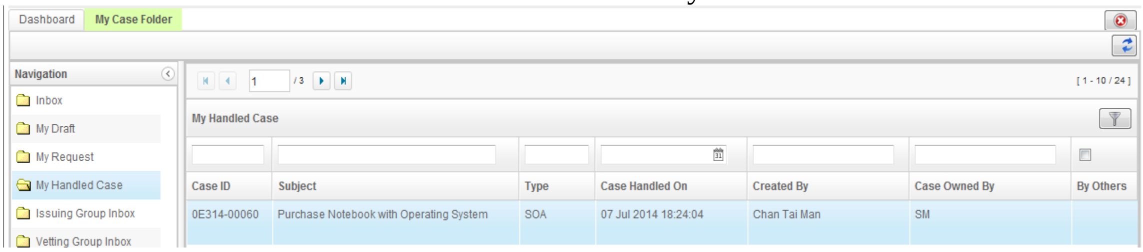
Button	Button Description
Complete Issuance	The system prompts user to confirm whether the issuance of invitation is completed or not. A successful message will be displayed if the issuance is completed.
Approval Form for Issuing Invitation	To generate formal document for seeking approval for issuing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

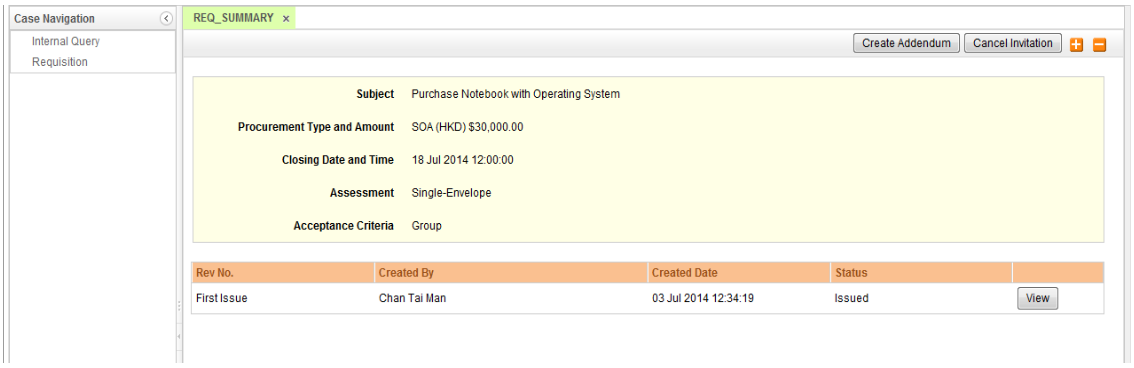
After the invitation to quotation issued, the handler is allowed to raise an addendum at least 48 hours before the submission closing date/time. To raise an addendum, please follow the steps below:

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



(Figure 4-34)

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

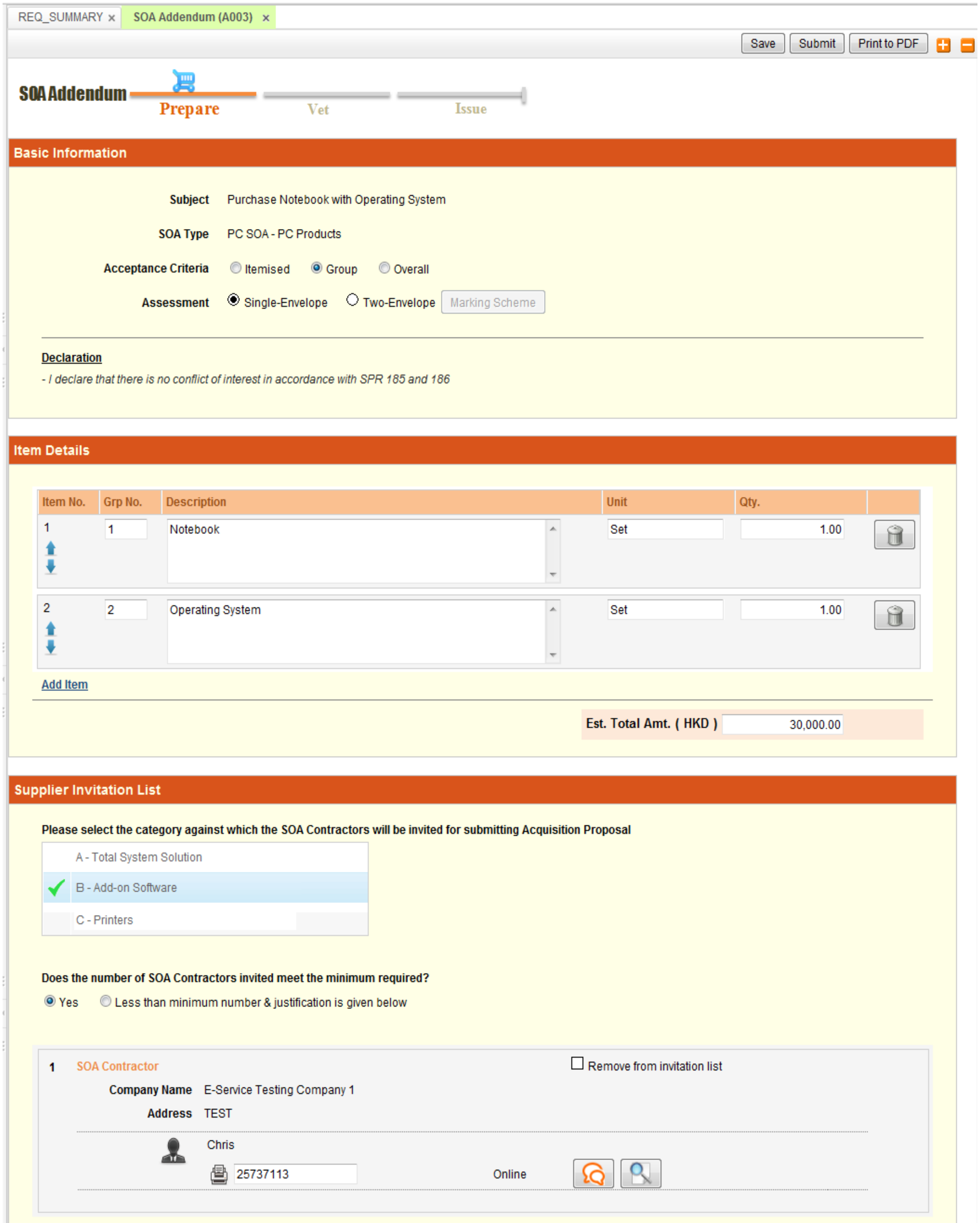


(Figure 4-35)

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

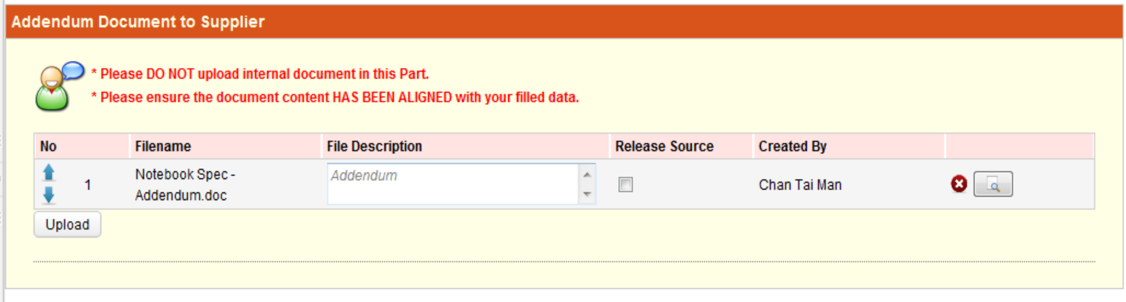
   Notes: Some of requisition information cannot be changed, e.g. Subject, SOA Type, Assessment, Supplier Invitation List (except Contact Information), etc.

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


REQ_SUMMARY
SOA Addendum (A003)
Save
Submit
Print to PDF
SOA Addendum
Prepare
Vet
Issue
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)
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
25737113
Online

(Figure 4-36)

The Addendum Document to Supplier must be provided.

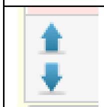
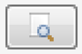


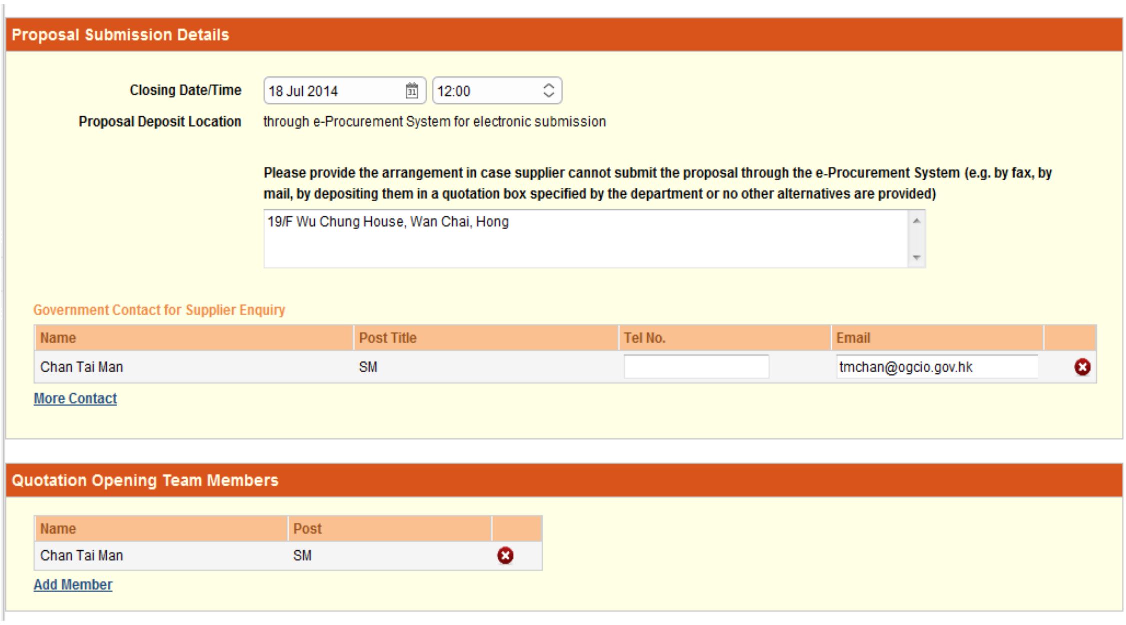
(Figure 4-37)

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
 PDF	To view the combined document
	To remove the uploaded file
	To replace the document



(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

(Figure 4-39)

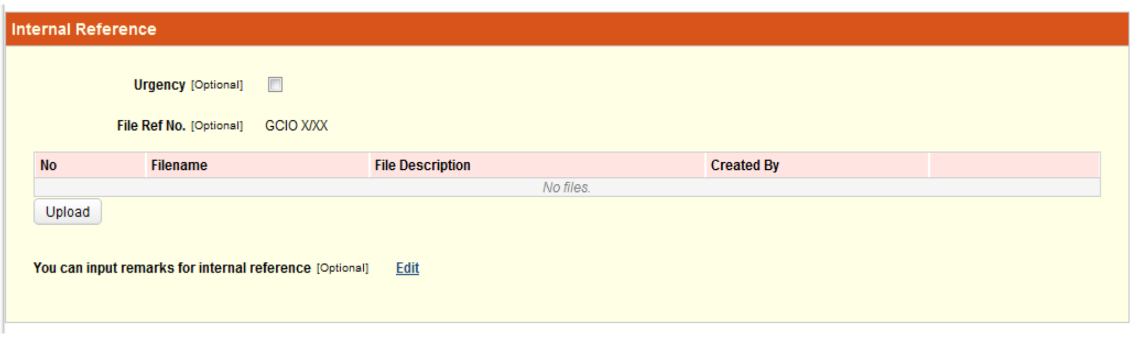
<u>Data Field Description</u>

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

<u>Button Description</u>

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.



(Figure 4-40)

4. Choose the action button for further processing.

(Figure 4-41)

Button Description

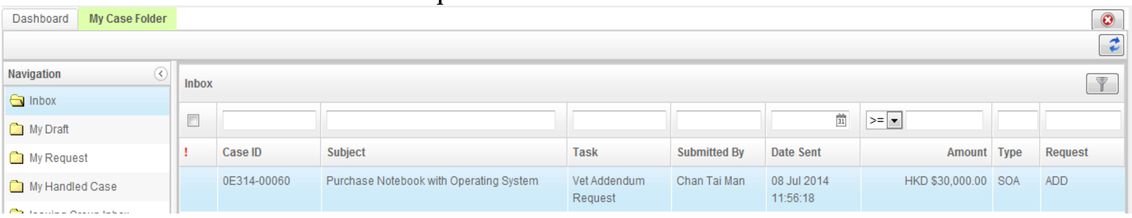
Button	Button Description
Save	To save the information inputted If the request is not copied from the latest version (i.e. another person has submitted another request), an alert message will be displayed. After saved, a successful message will be displayed. The request can be found in requestor's My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

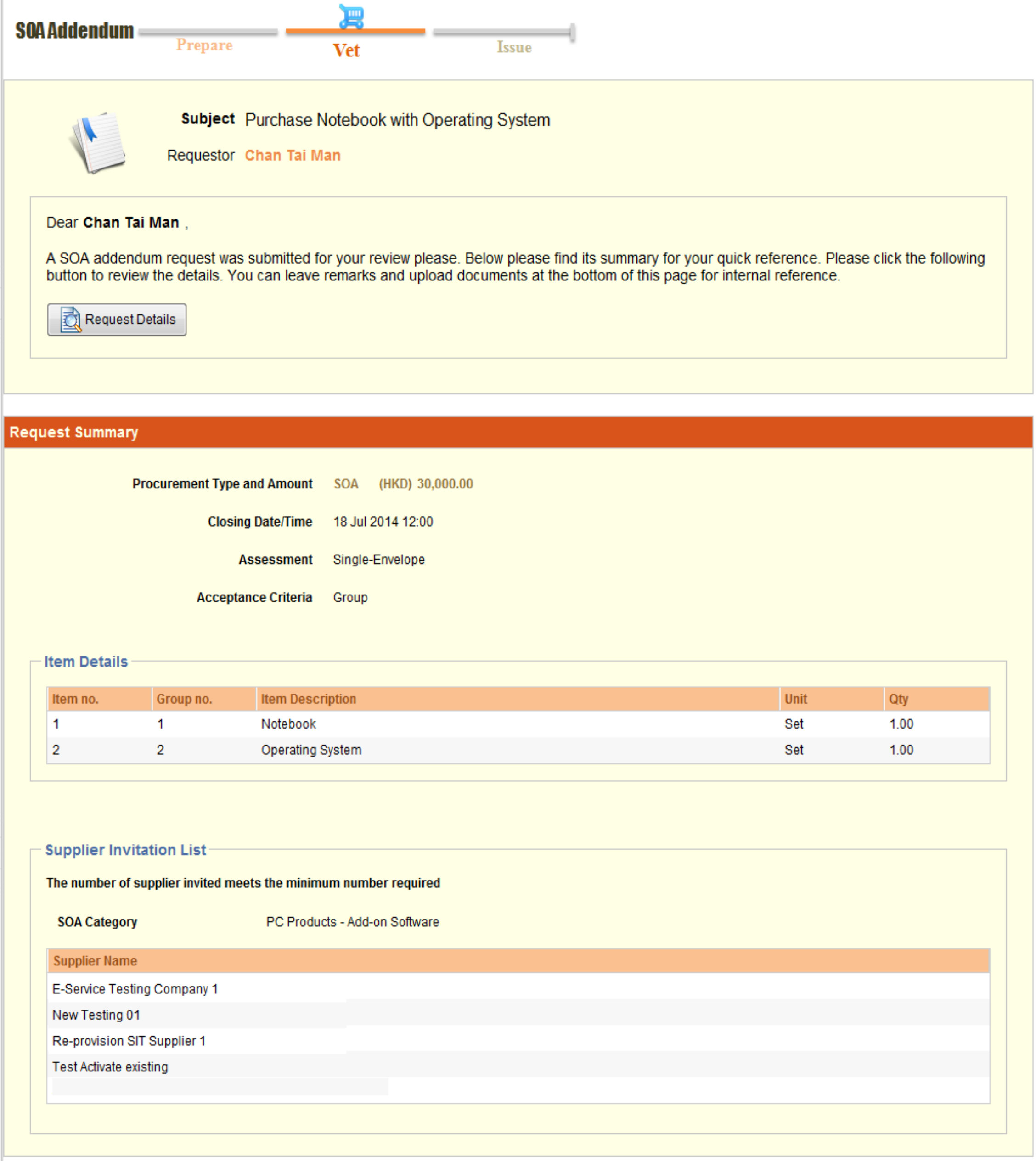
The Vetting Officer may locate the addendum request from the Inbox folder. To perform the vetting, please follow the steps below:

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



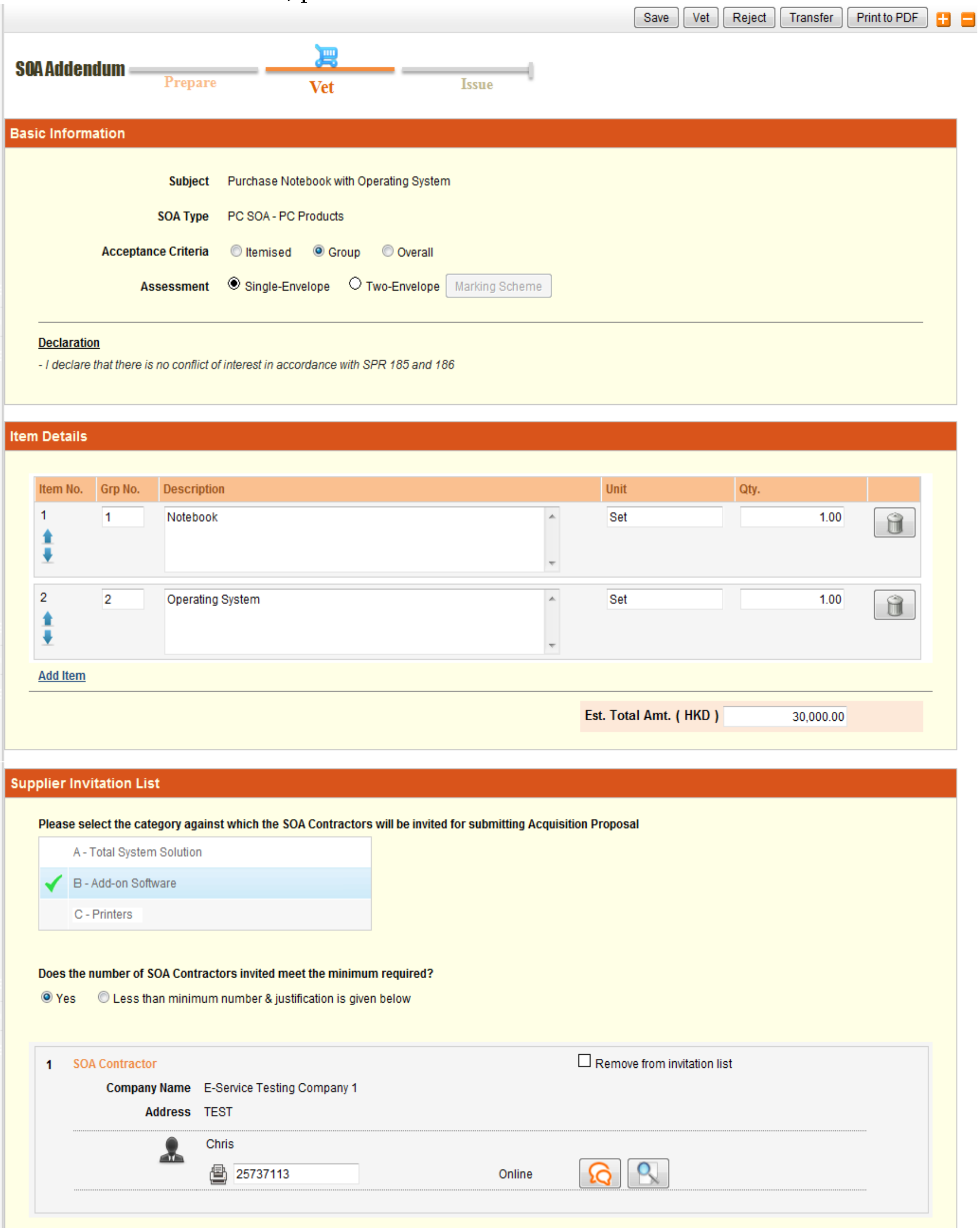
(Figure 4-42)

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

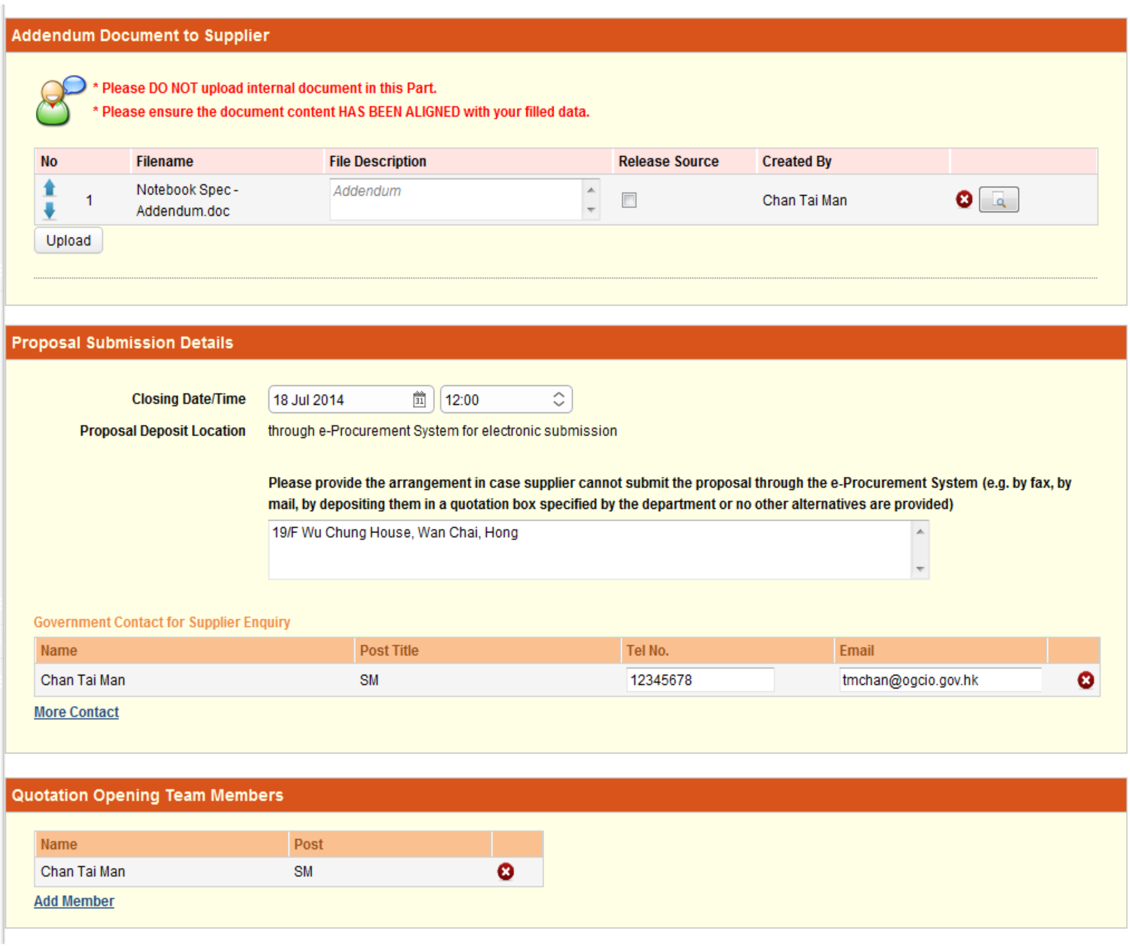


(Figure 4-43)

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.

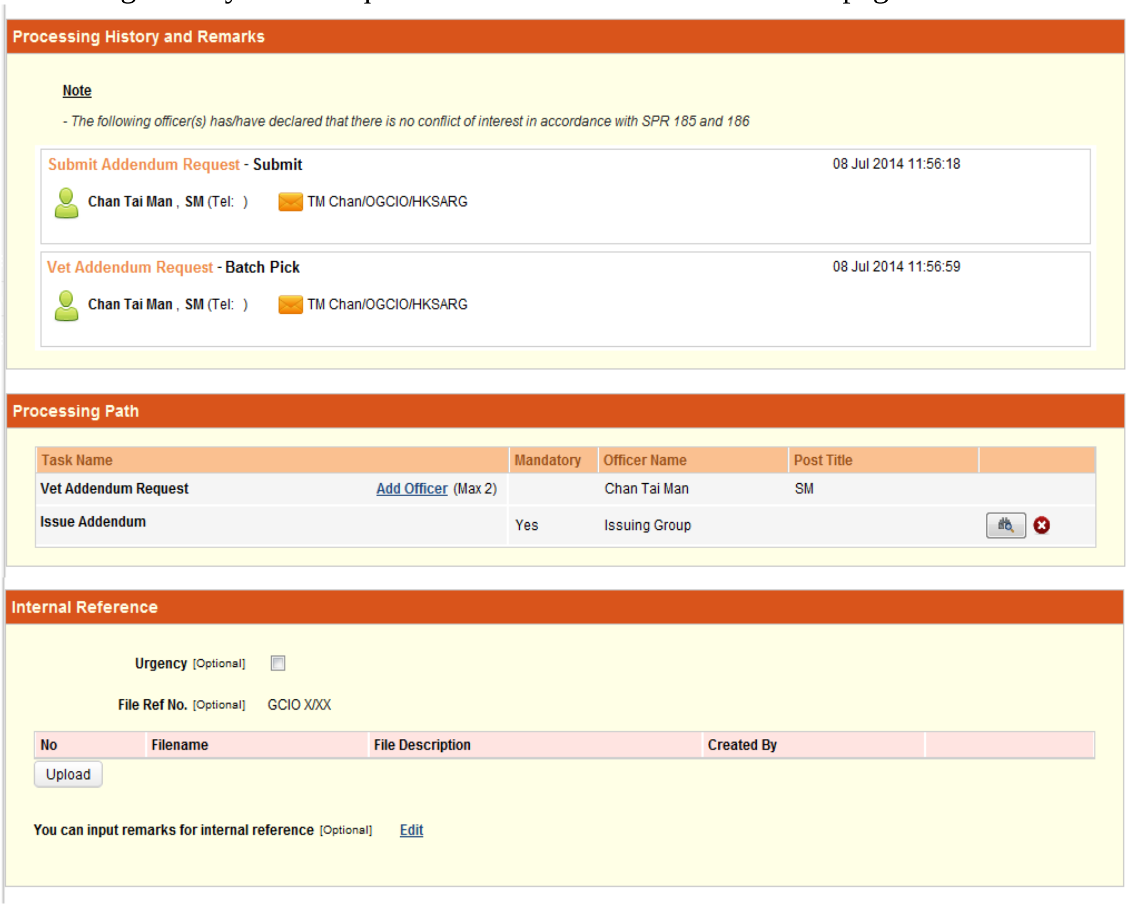


(Figure 4-44)


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
Upload
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
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.



(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)

<u>Button Description</u>

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.

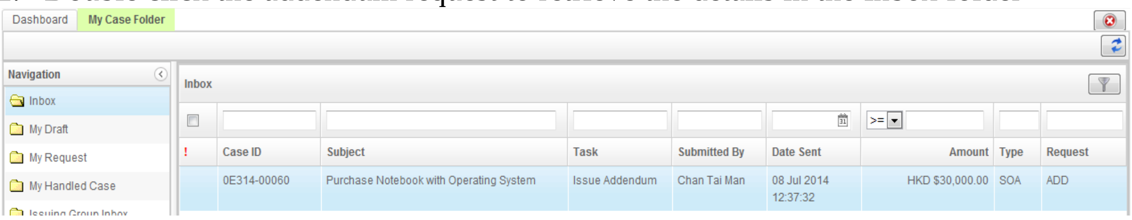
Button	Button Description
Re-submit	To submit the addendum request The system will perform validation on the user's inputs. If the validation is passed and the re-submit action is completed successfully, 1. A successful message will be displayed 2. The request will be passed to next handler, who will 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.

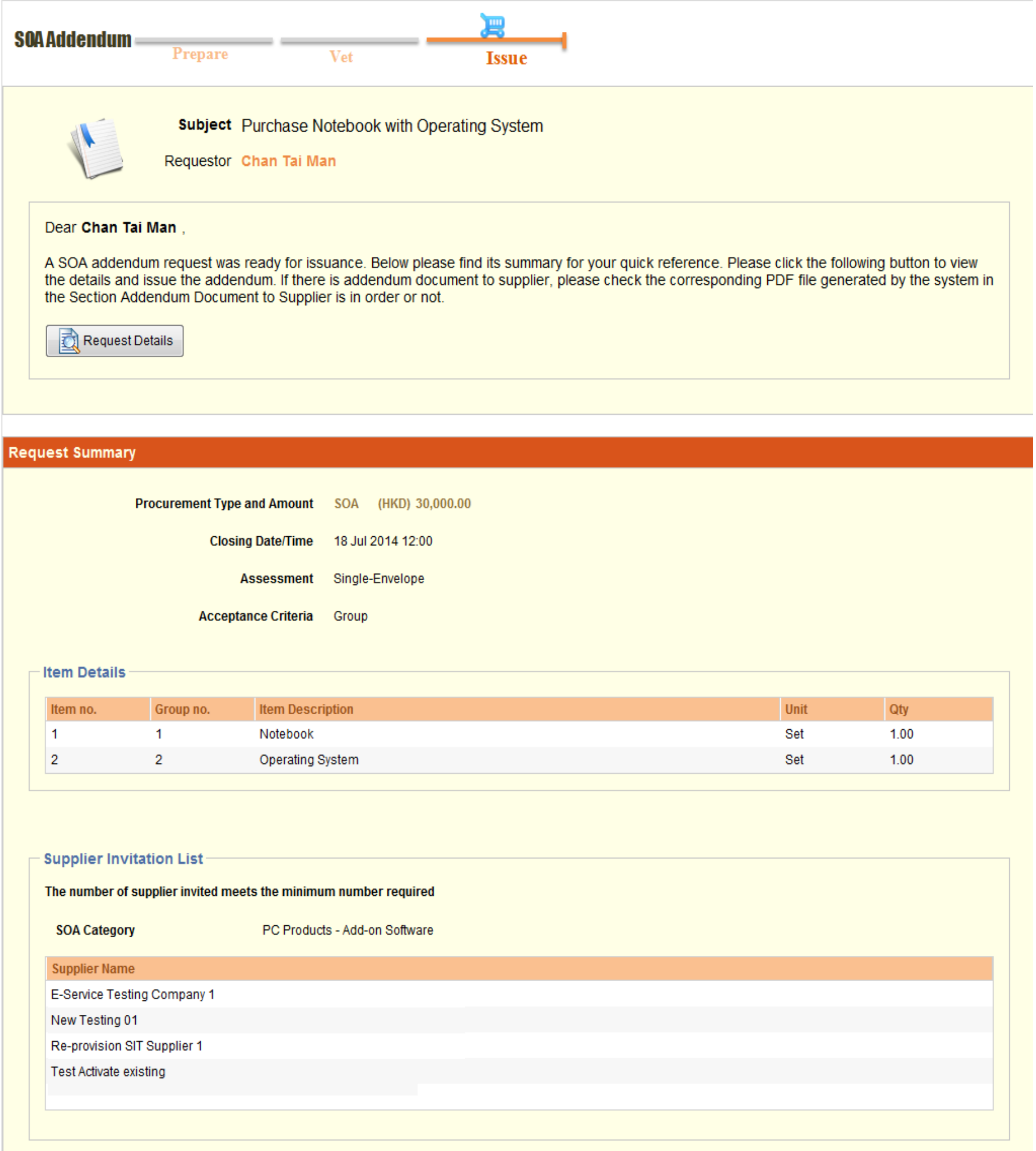
The Issuing Officer may locate the request from the Inbox folder. To perform the addendum issuing, please follow the steps below:

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



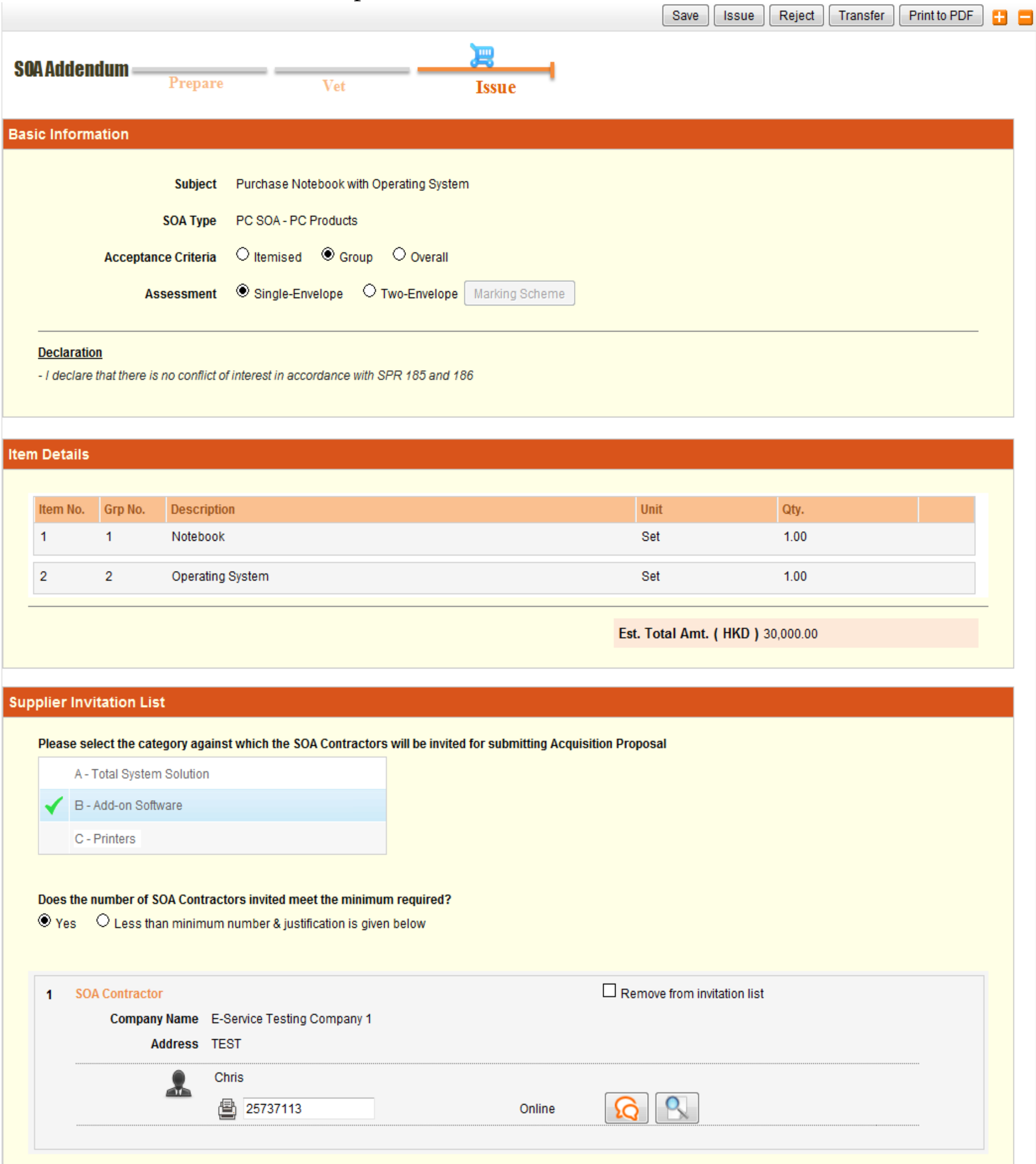
(Figure 4-49)

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



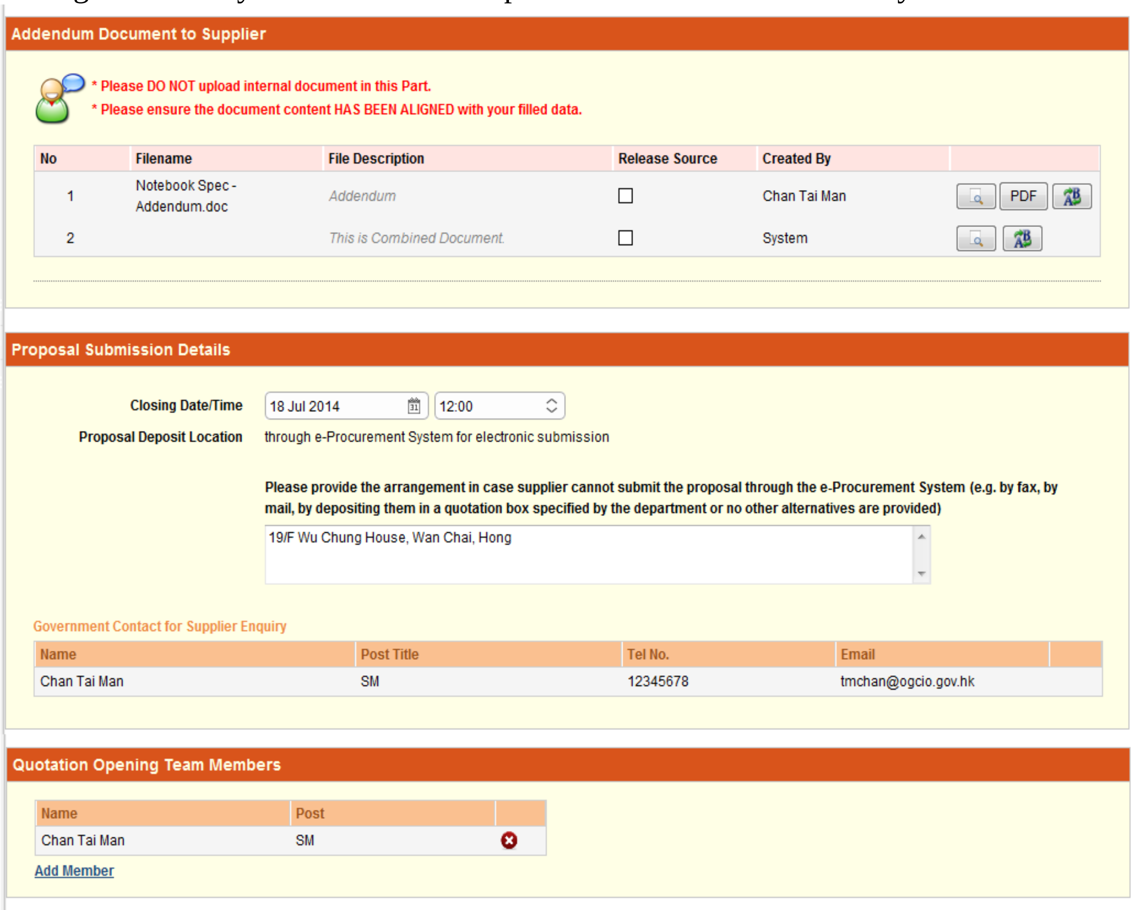
(Figure 4-50)

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.



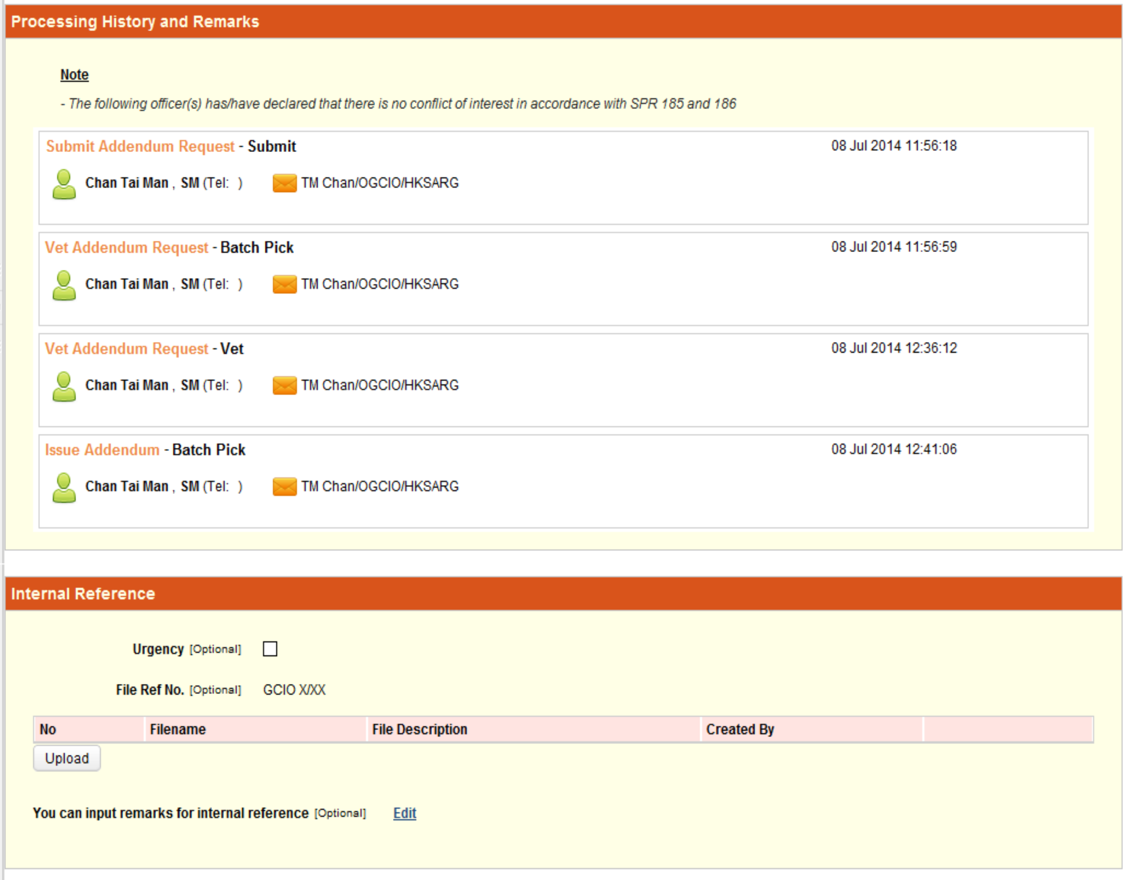
(Figure 4-51)

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.



(Figure 4-52)

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



(Figure 4-53)

4. Choose the action button for further processing.

(Figure 4-54)

<u>Button Description</u>

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	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 addendum. 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 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.

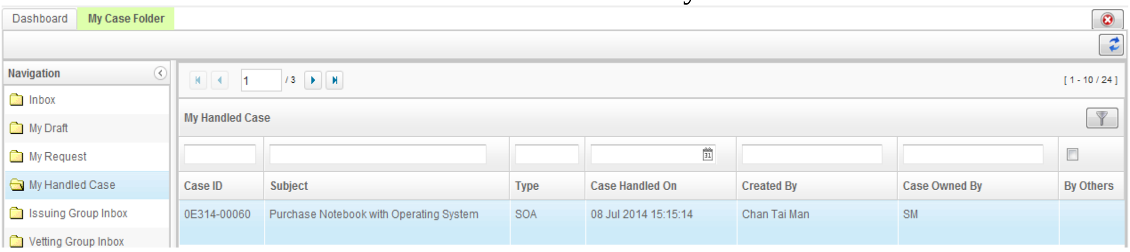
Notes: If the addendum issuing process is not complete, the system will not proceed to quotation opening stage.

4.4 CANCELLATION OF INVITATION

4.4.1 Prepare Cancellation of Invitation

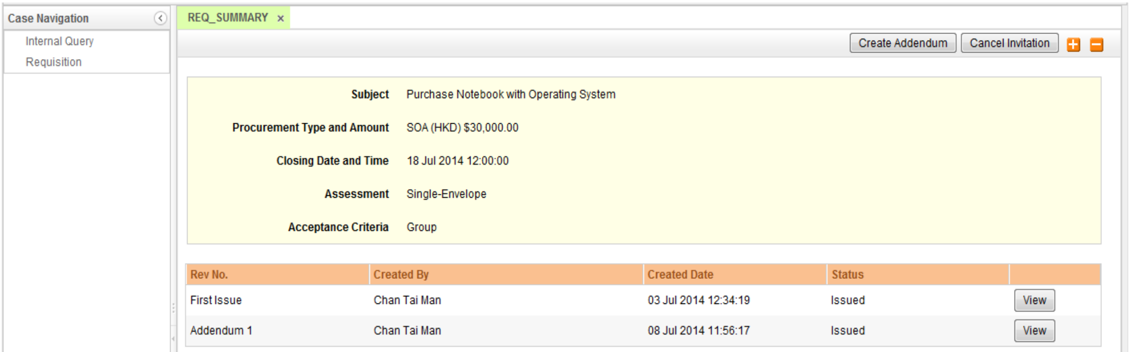
After the invitation to quotation is issued, the handler is allowed to raise a cancellation of invitation at least 48 hours before the submission closing date/time. To raise a cancellation of invitation, please follow the steps below:

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



(Figure 4-55)

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

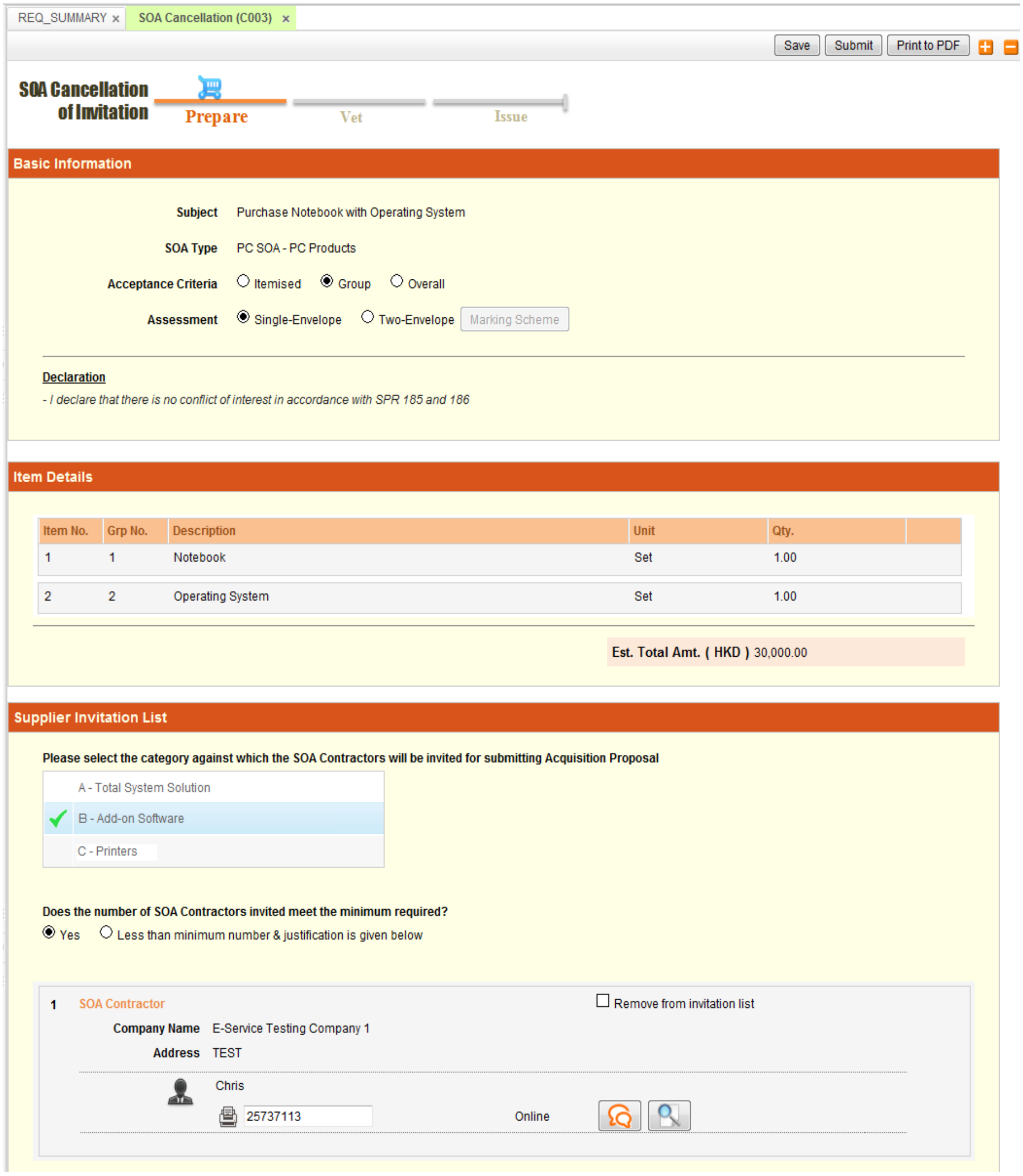


(Figure 4-56)

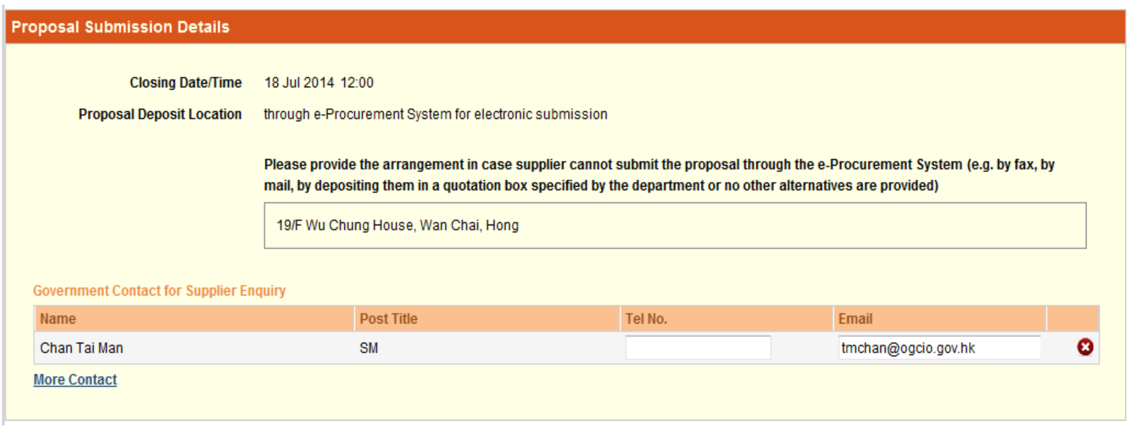
3. SOA Cancellation of Invitation page in Prepare stage displays. The handler may modify / provide the information for cancellation.

   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.


REQ_SUMMARY
SOA Cancellation (C003)
Save
Submit
Print to PDF
SOA Cancellation of Invitation
Prepare
Vet
Issue
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
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
25737113
Online

(Figure 4-57)



(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

(Figure 4-59)

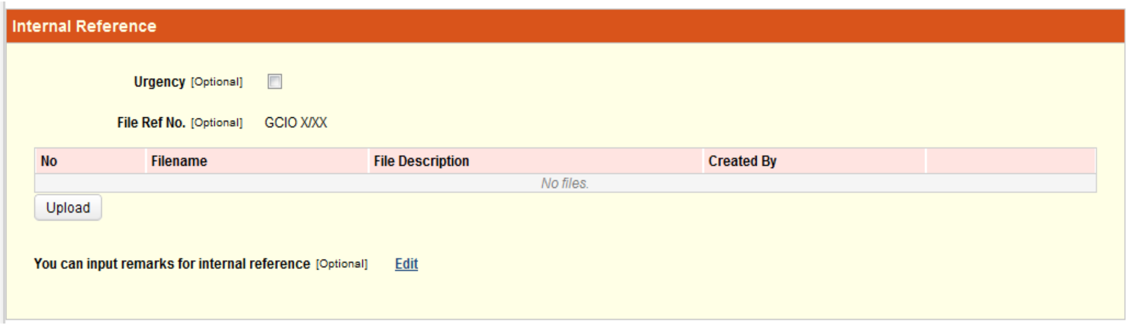
Data Field Description

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
Add officer	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



(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.

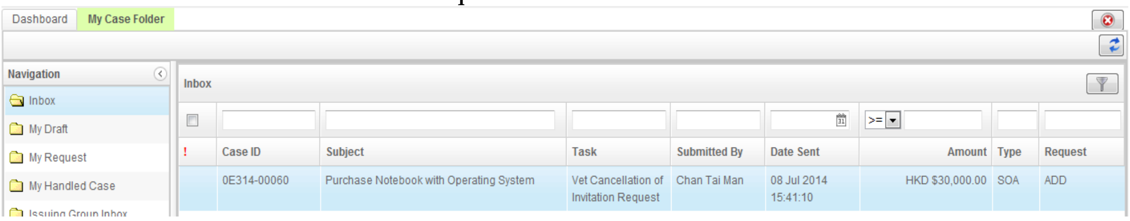
Submit	To submit the cancellation request If the request is not copied from the latest version (i.e. another person has submitted another request), an alert message will be displayed. The system will perform validation on the user's inputs. If the validation is passed and submit action is completed successfully, 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.

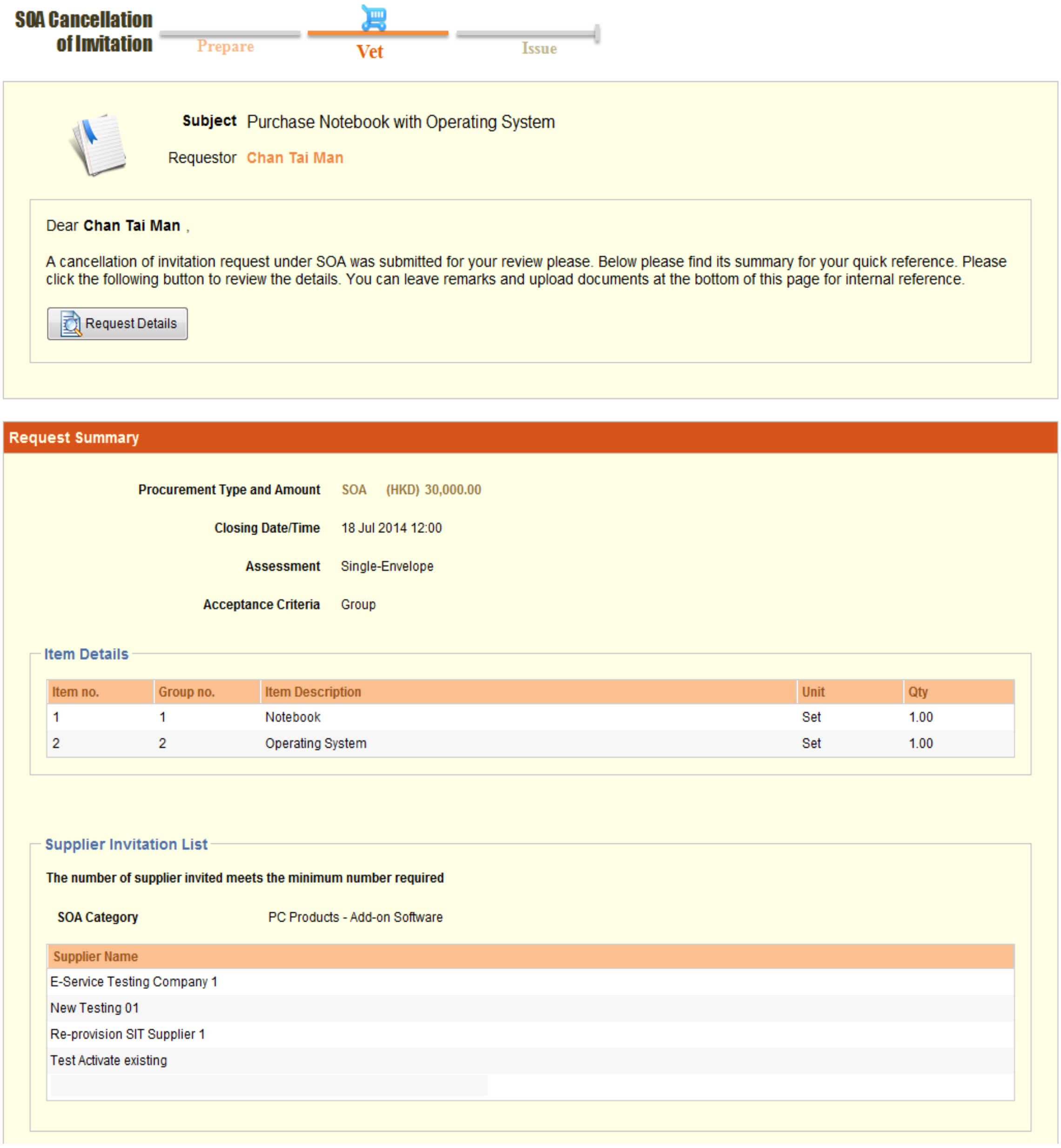
The Vetting Officer may locate the cancellation request from the Inbox folder. To perform the vetting, please follow the steps below:

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



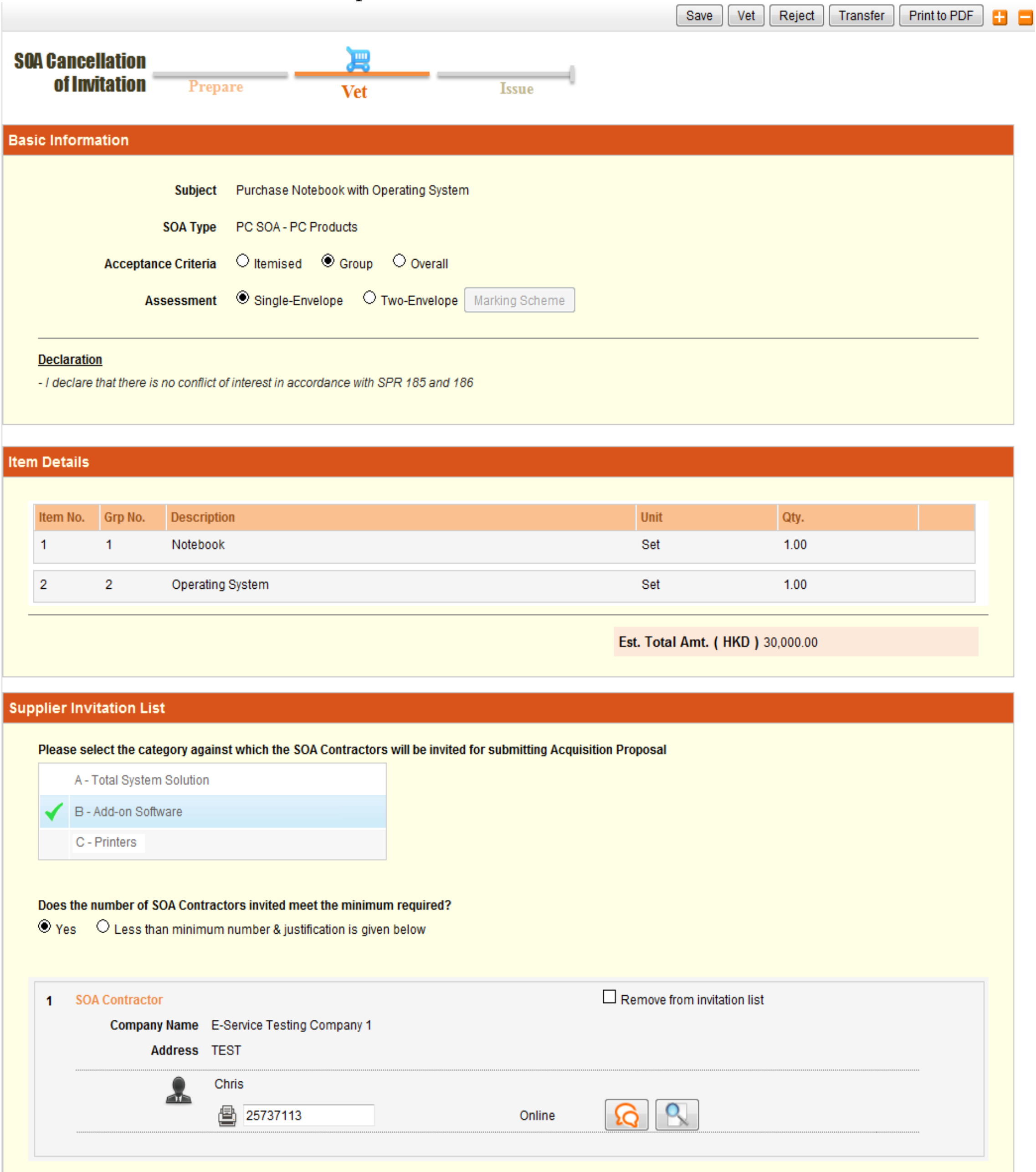
(Figure 4-62)

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

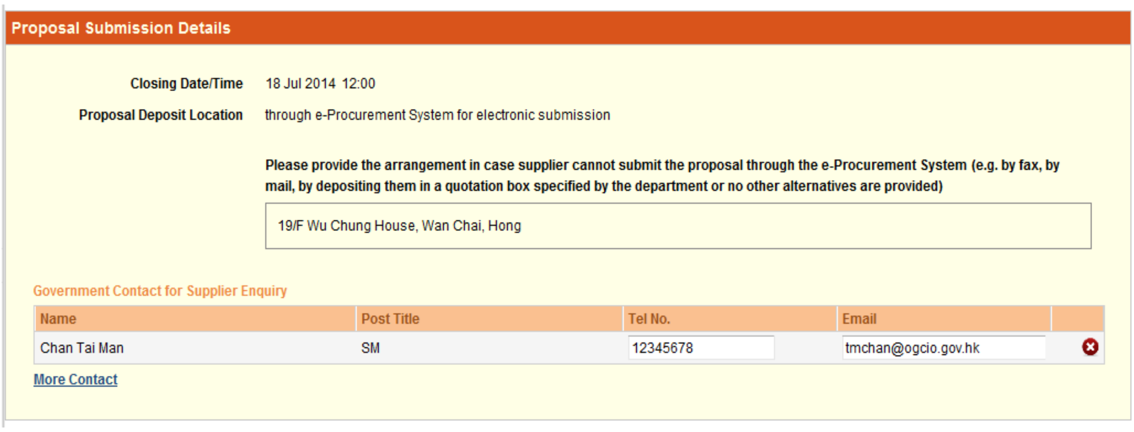


(Figure 4-63)

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.

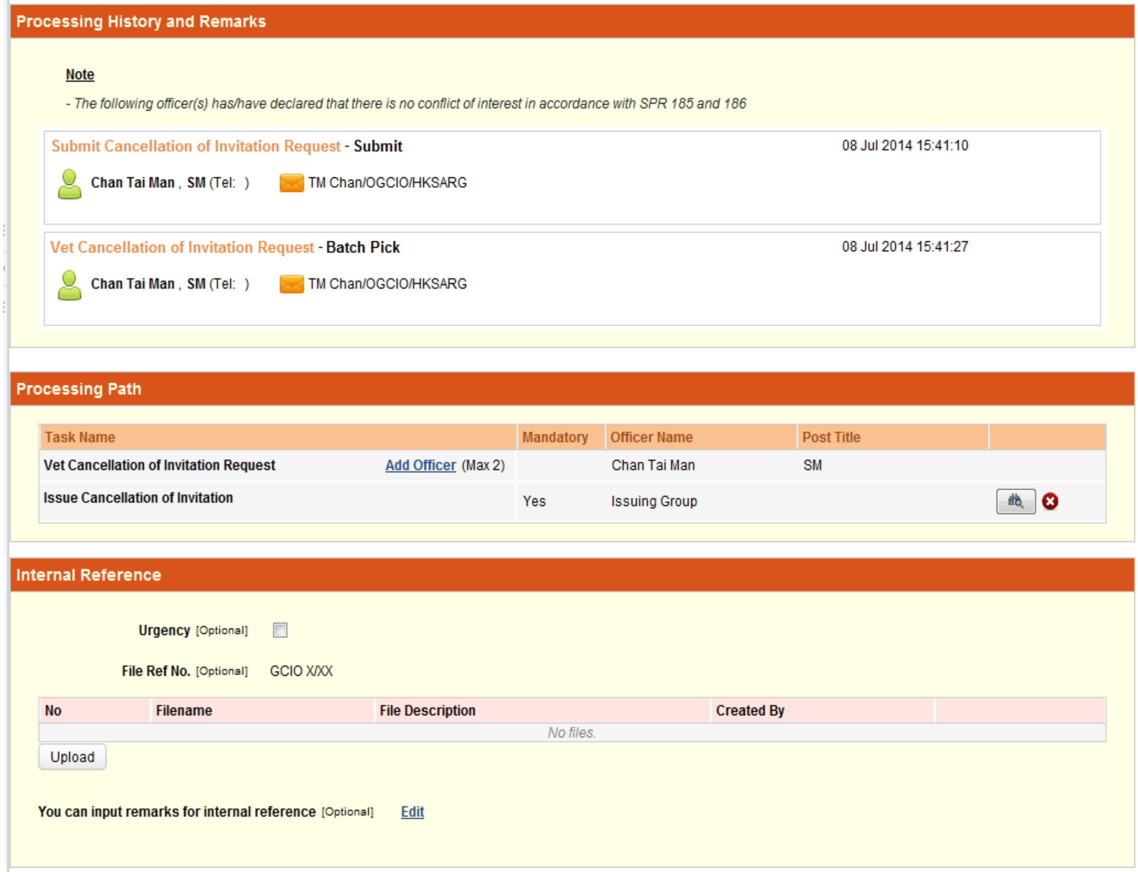


(Figure 4-64)



(Figure 4-65)

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



(Figure 4-66)

4. Choose the action button for further processing.

(Figure 4-67)

<u>Button Description</u>

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

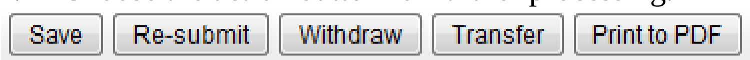
To re-submit / withdraw / transfer the cancellation request, the handler may follow the steps below:

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)

<u>Button Description</u>

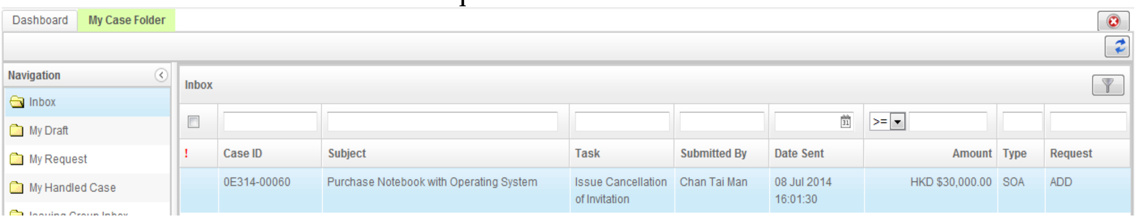
Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed. Notes: Only the request has been rejected, the button will be available.
Re-submit	To submit the cancellation request The system will perform validation on the user’s inputs. If the validation 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.

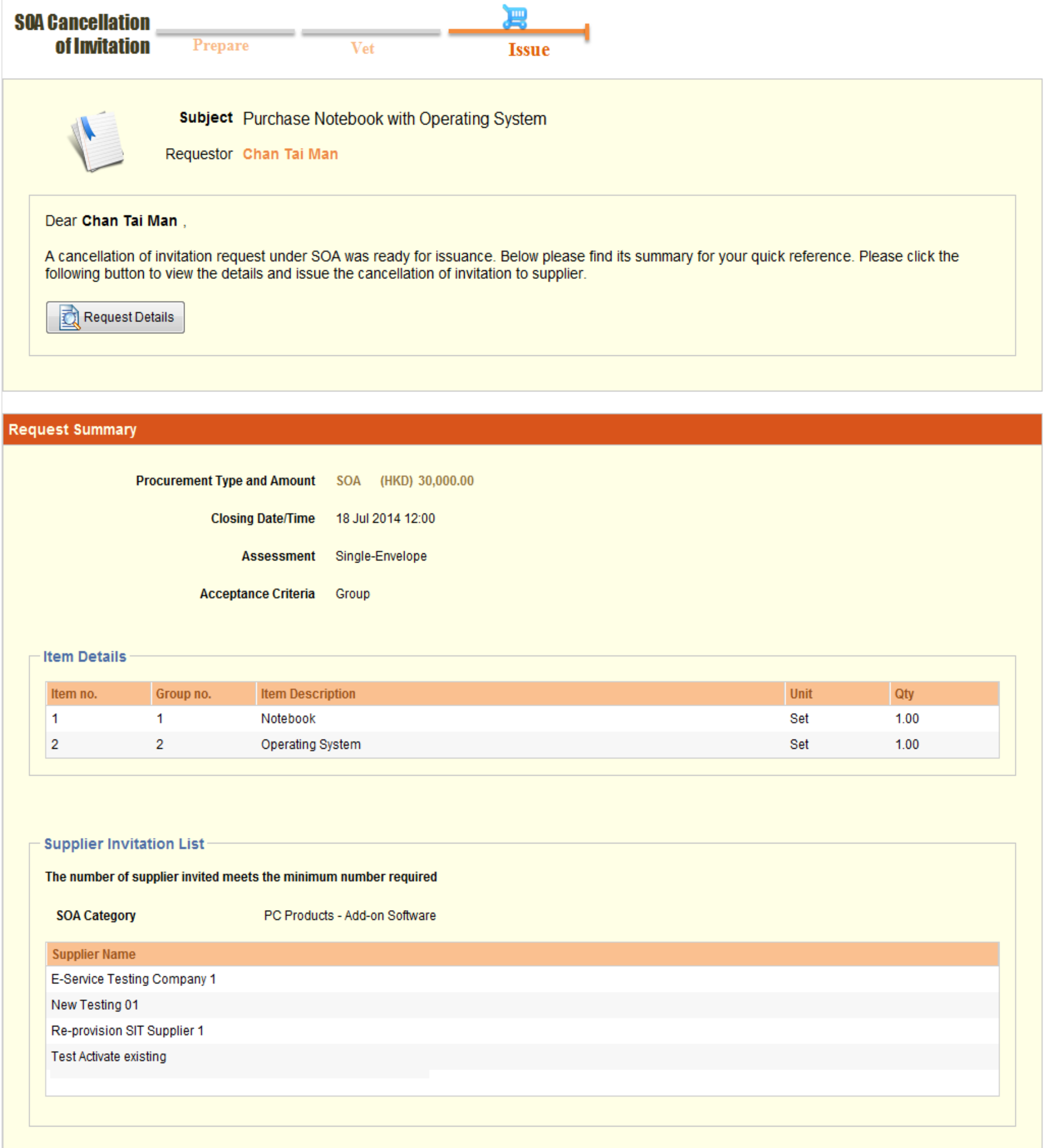
The Issuing Officer may locate the request from the Inbox folder. To perform the cancellation issuing, please follow the steps below:

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



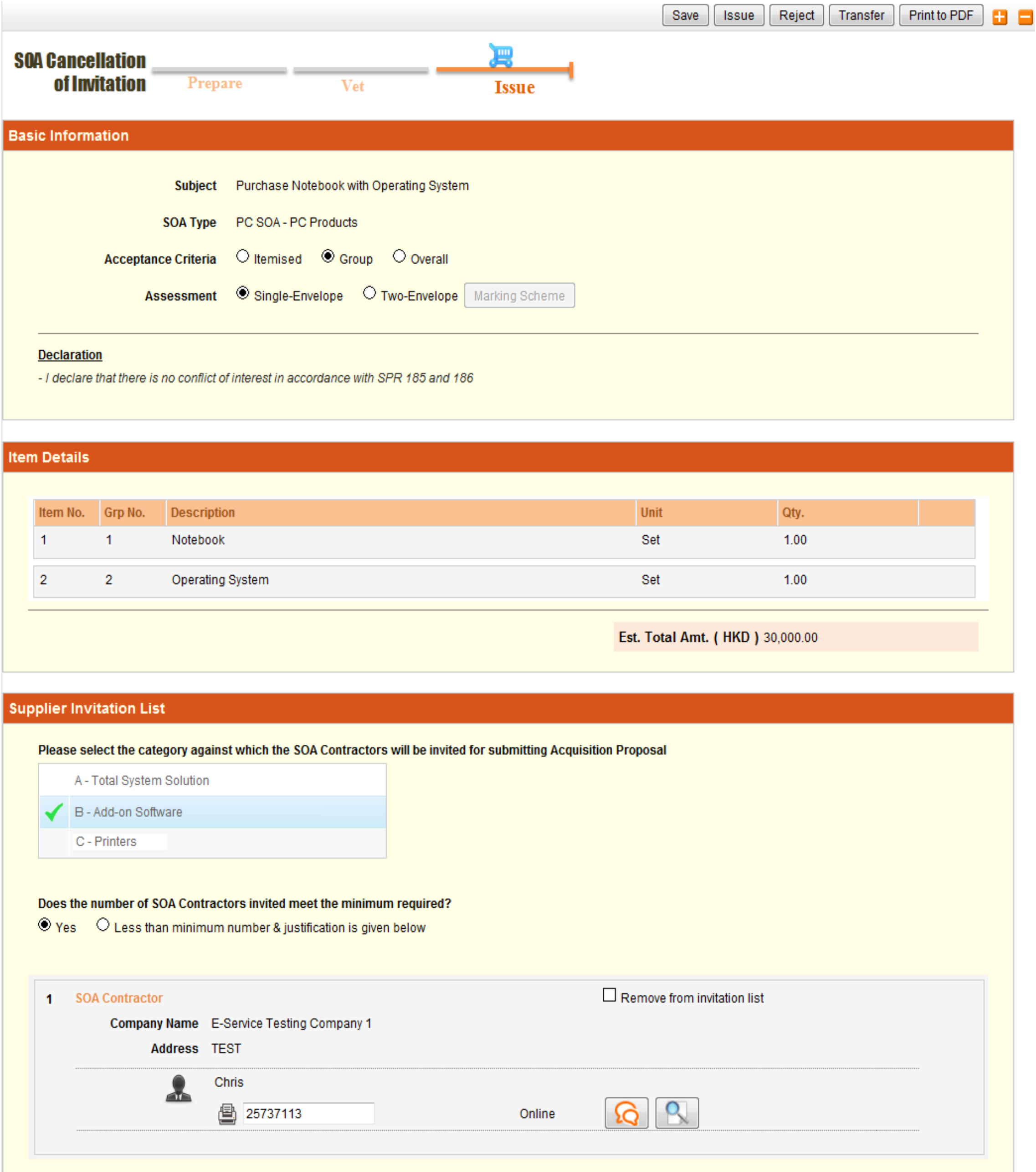
(Figure 4-69)

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



(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.



Save | Issue | Reject | Transfer | Print to PDF

SOA Cancellation of Invitation — Prepare — Vet — Issue

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	

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

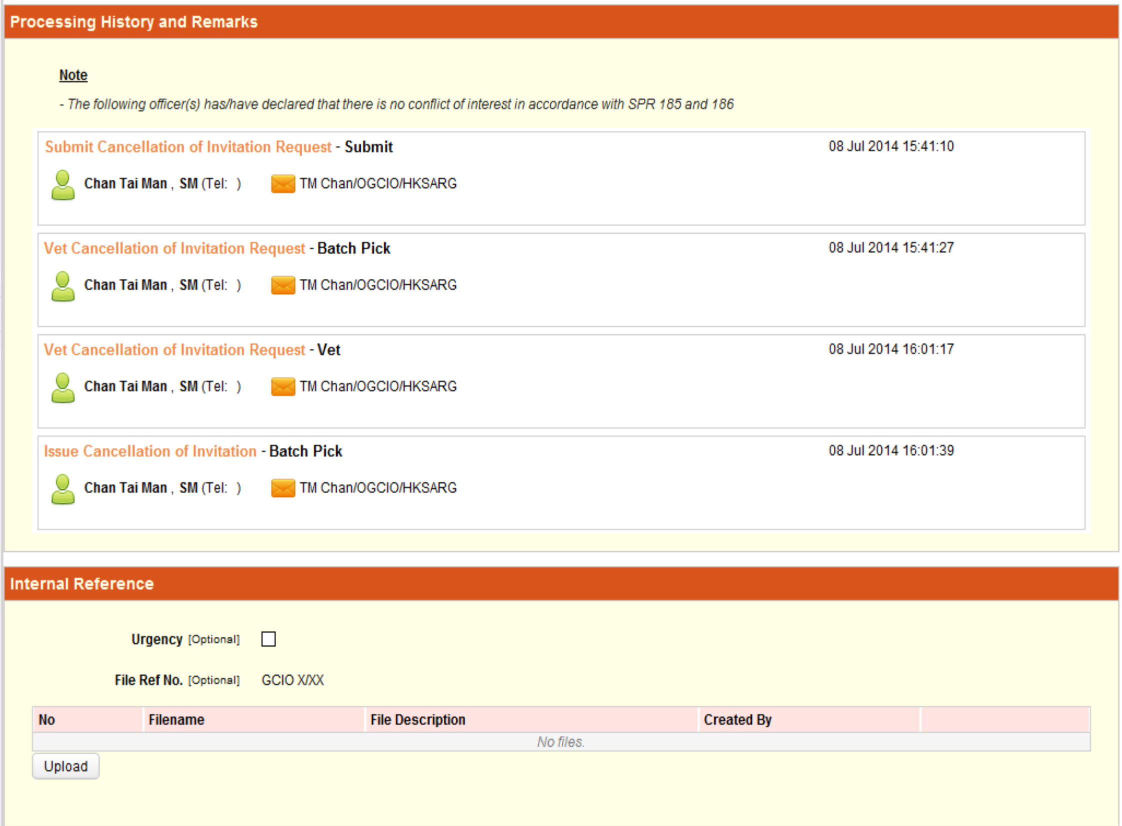
Chris

25737113 Online

(Figure 4-71)

(Figure 4-72)

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



(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

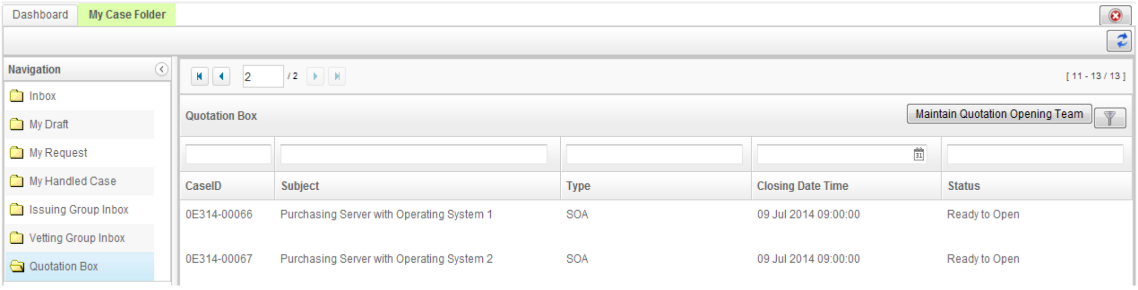
Under below conditions, Open Quotation Team member(s) will receive an email reminder on

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

<u>Special Arrangement under Bad Weather</u>

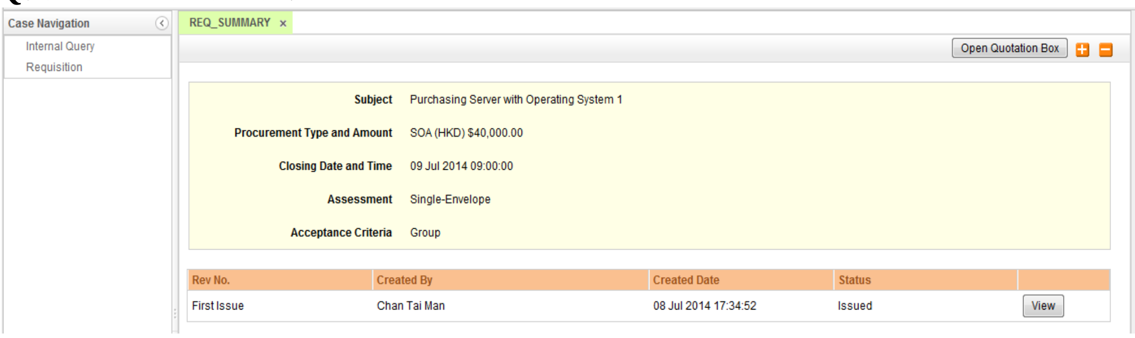
In case if a black rainstorm warning or a tropical cyclone signal No. 8 or above is hoisted ("inclement weather signal") any time within three hours prior to the quotation closing time on the quotation closing date, the quotation closing date will be extended to the next working day (except Saturday, 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.



(Figure 4-75)

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

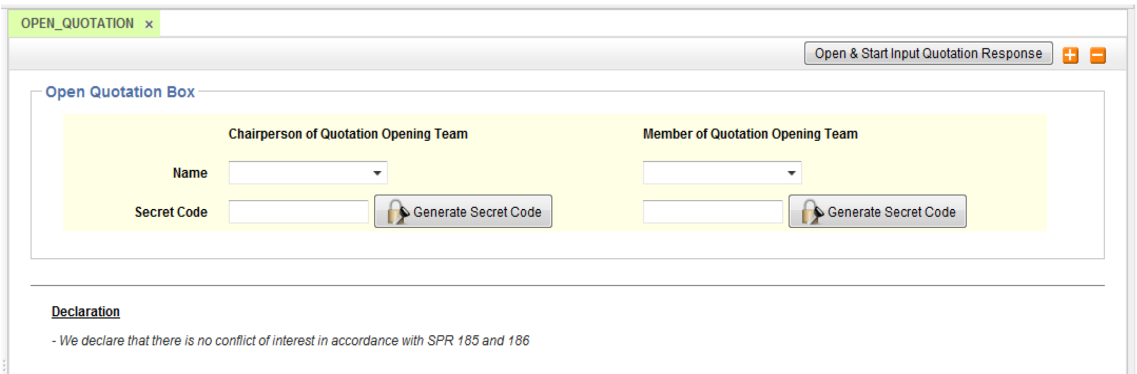


(Figure 4-76)

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



(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.

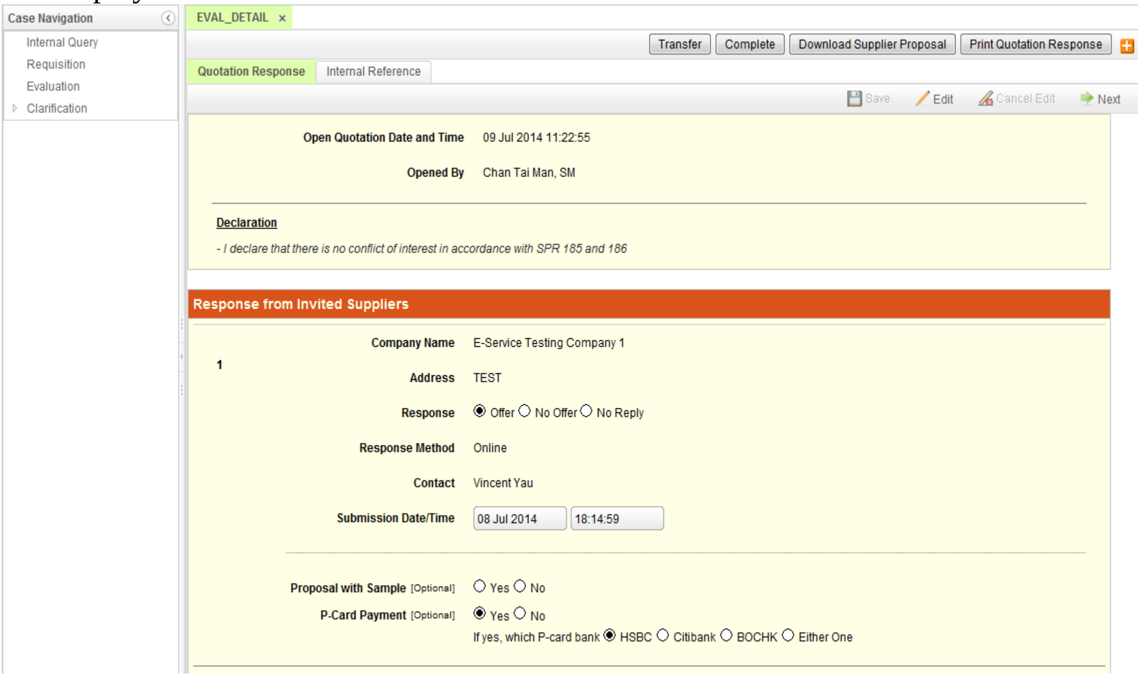
4.5.2 Single-Envelope

4.5.2.1 Input Quotation Response

Quotation Response

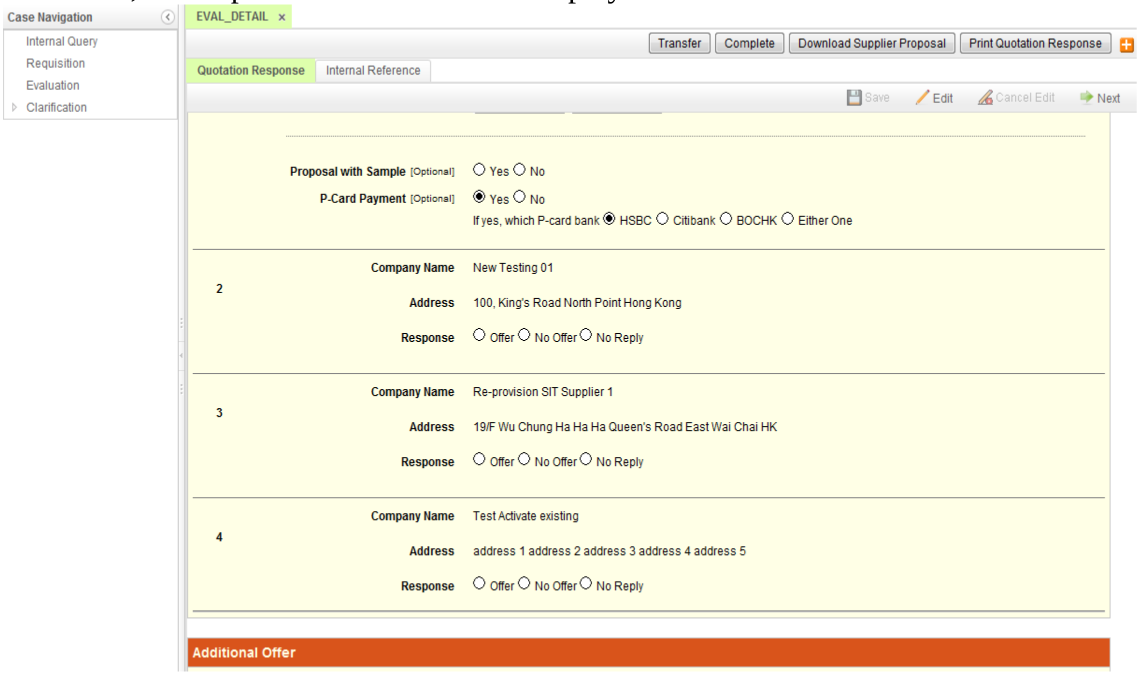
In the Quotation Response page under Evaluation Summary, a list of response from invited suppliers display.

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



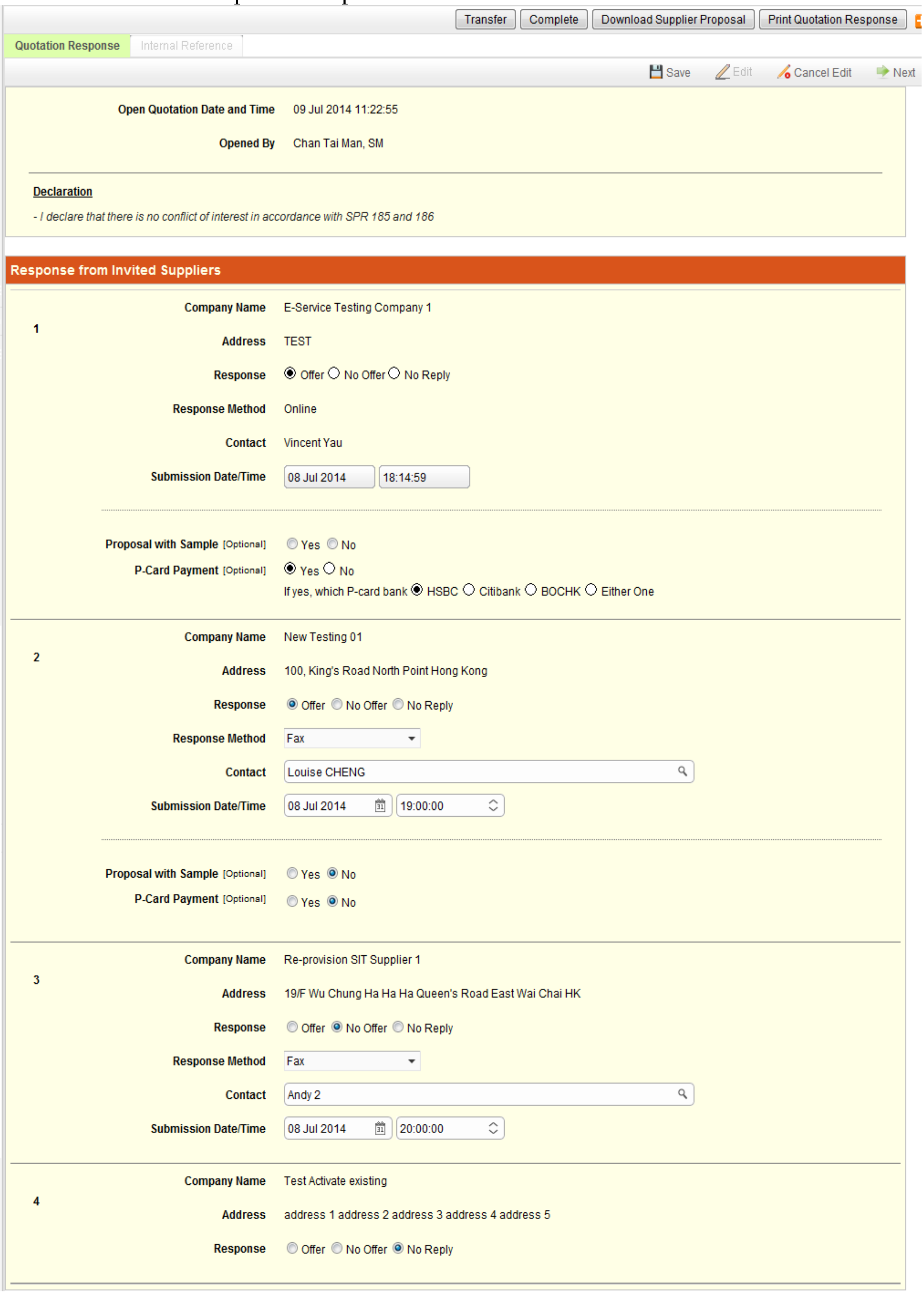
(Figure 4-78)

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



(Figure 4-79)

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

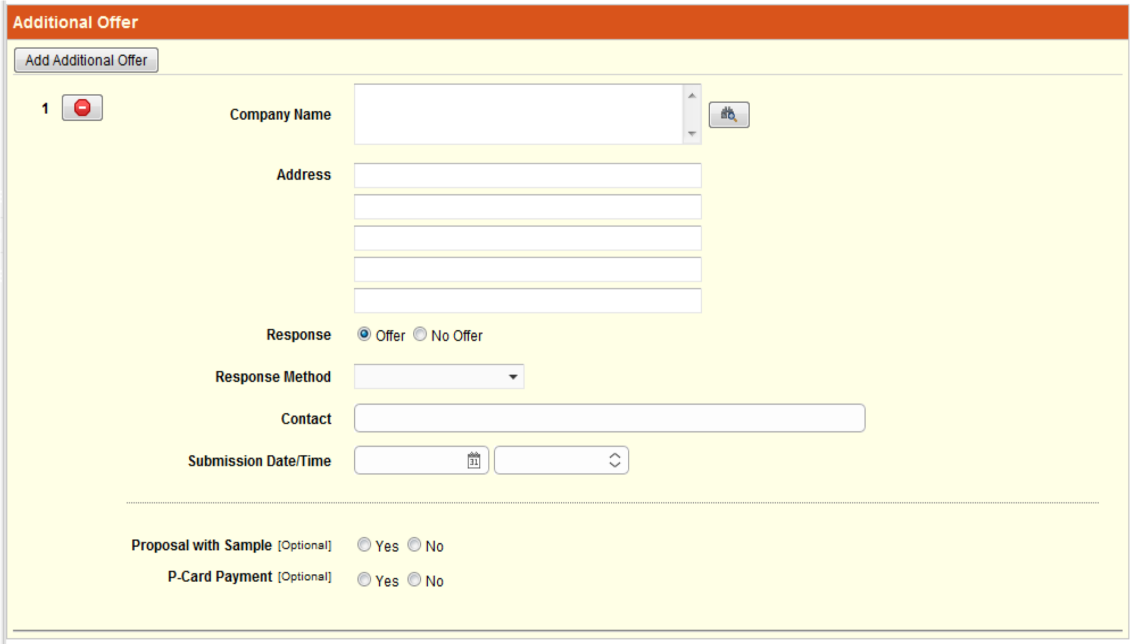


(Figure 4-80)

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	To input an additional offer submitted by supplier or non-invited supplier. This button is only available in edit mode. 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.
	To remove the additional offer of supplier

User may choose the action buttons for further processing.

(Figure 4-82)

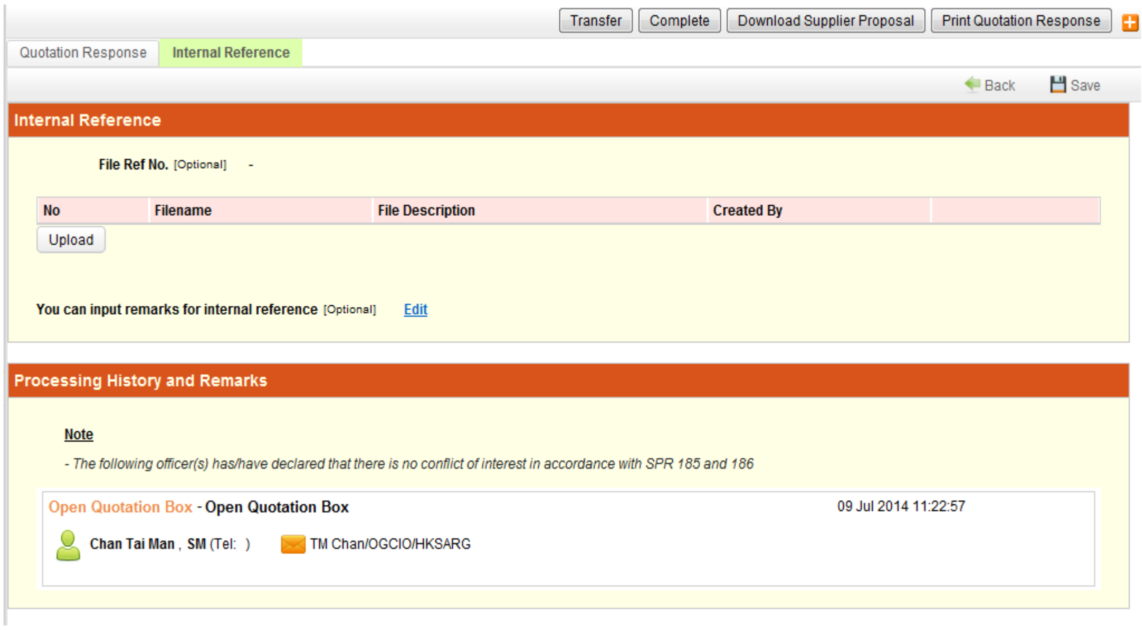
Button Description

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

<u>Button Description</u>

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)

<u>Button Description</u>

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.

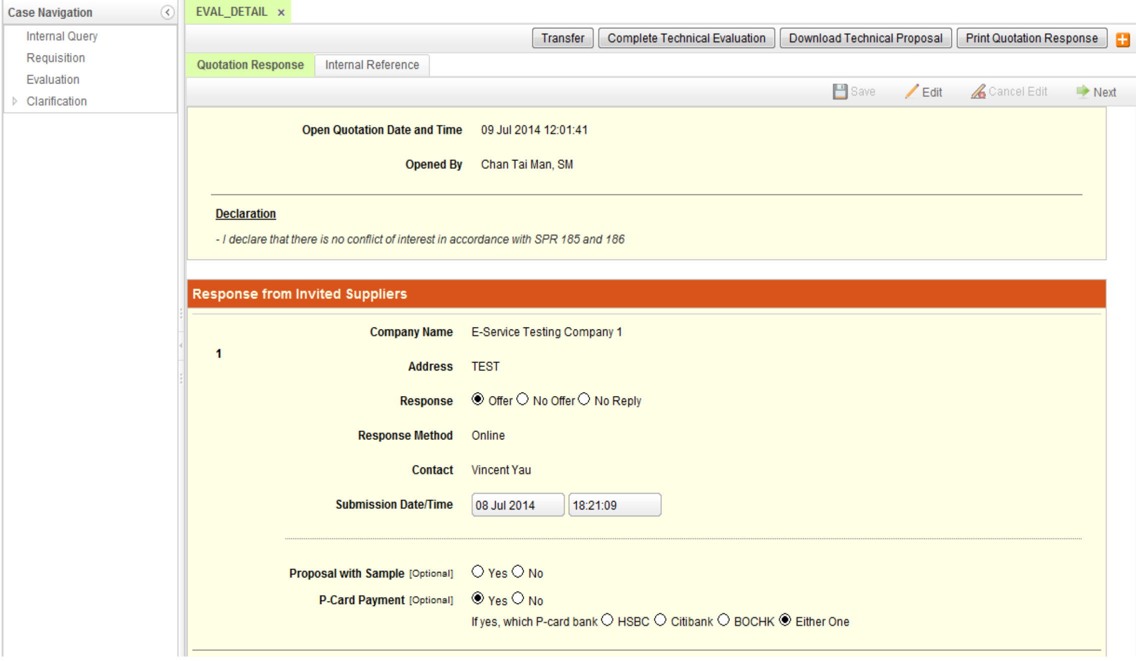
4.5.3 Two Envelope

4.5.3.1 Input Quotation Response

<u>Quotation Response</u>

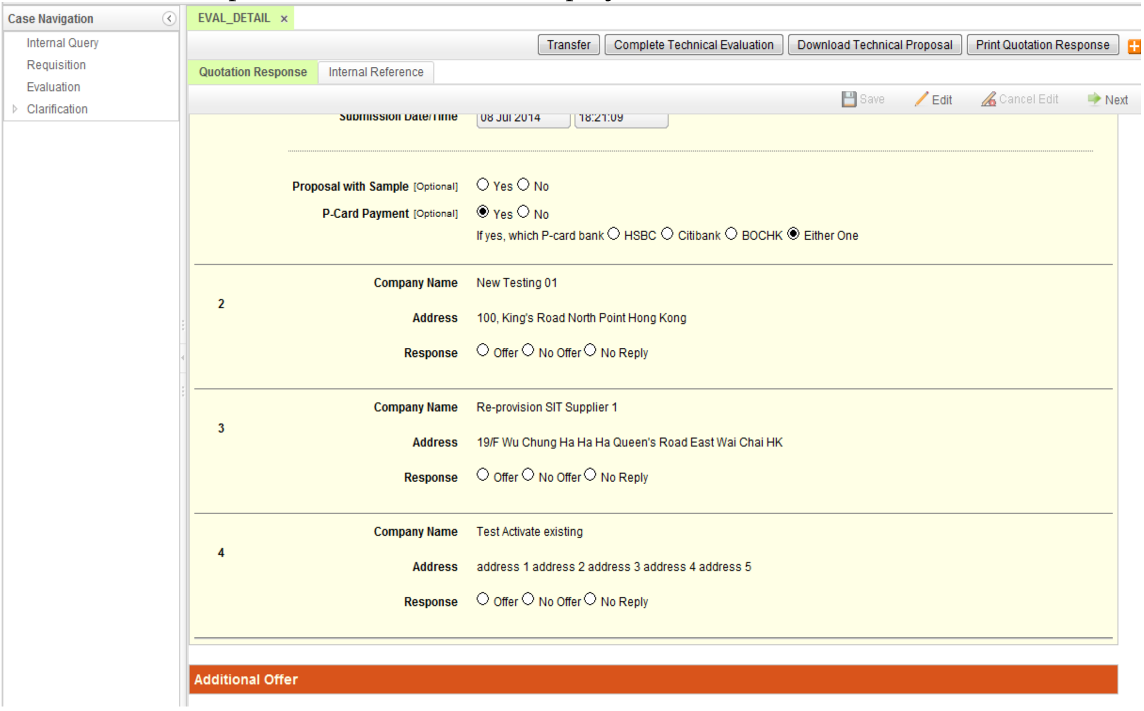
In the Quotation Response page under Evaluation Summary, a list of response from invited suppliers display.

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



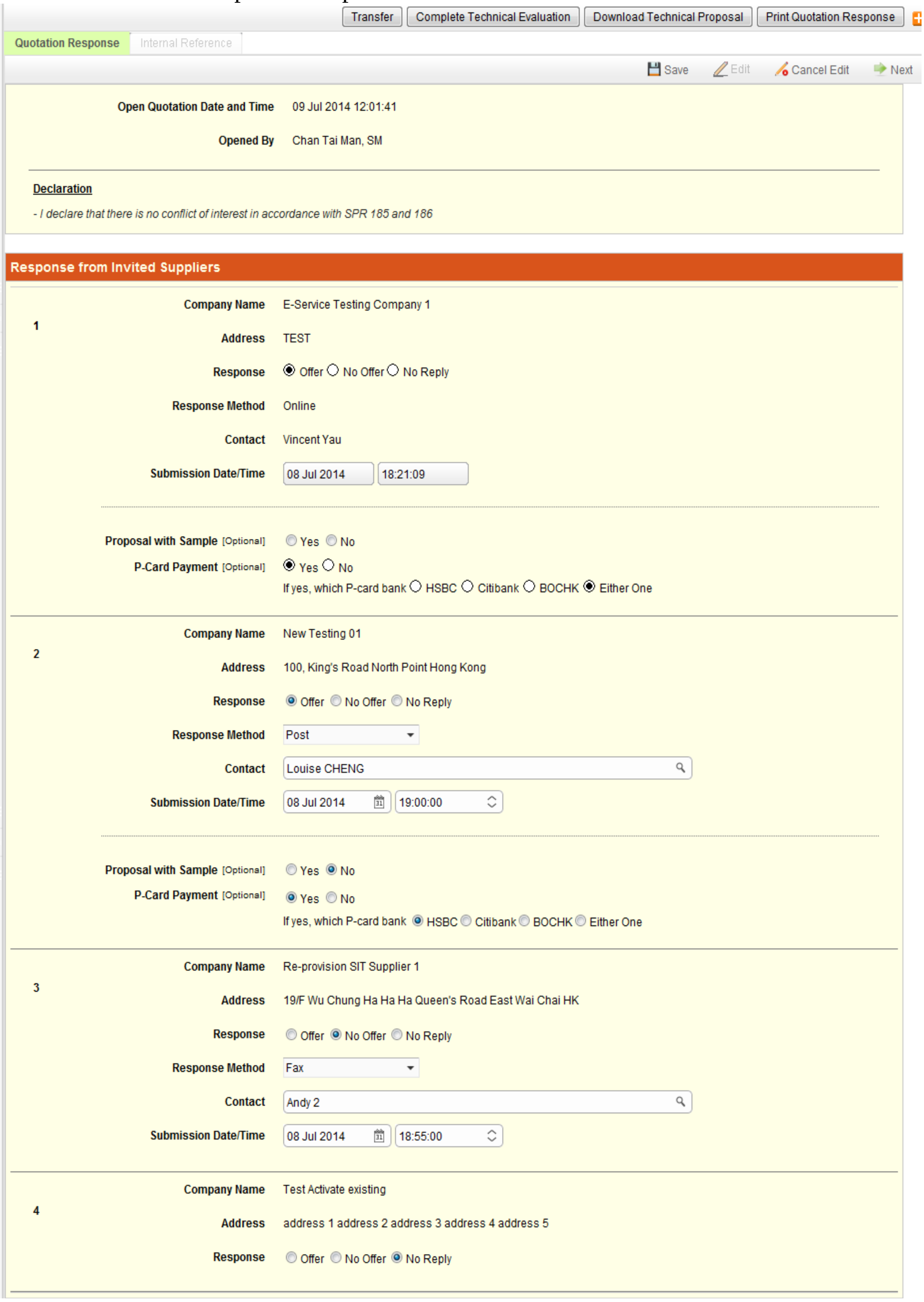
(Figure 4-86)

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



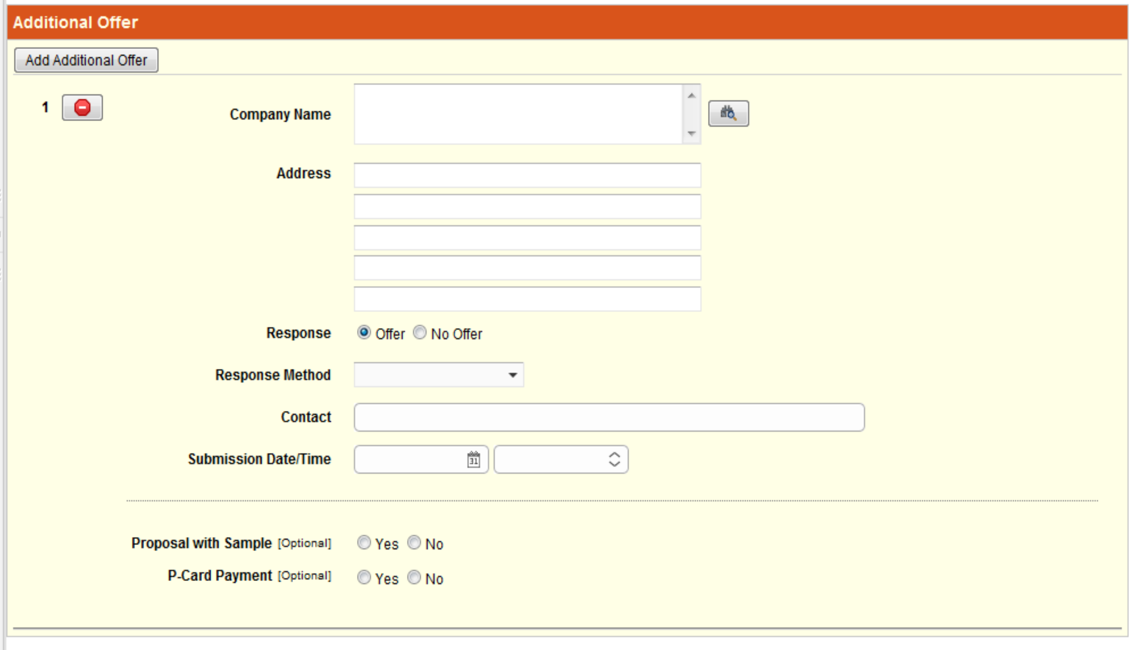
(Figure 4-87)

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



(Figure 4-88)

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



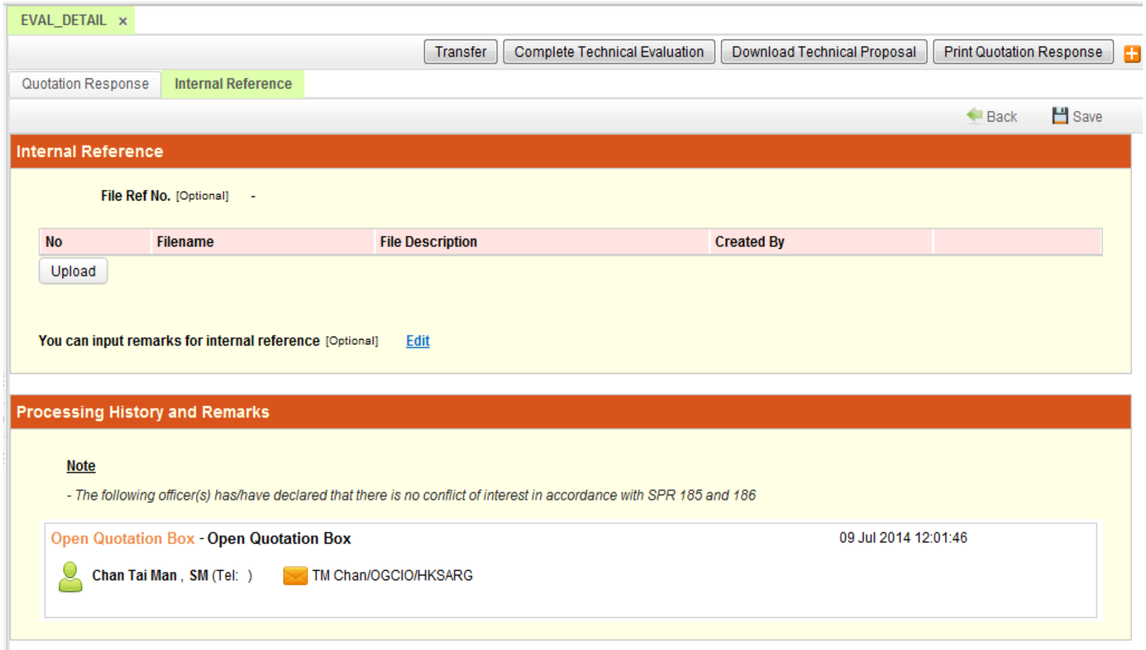
(Figure 4-89)

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

<u>Internal Reference</u>

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.



(Figure 4-90)

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

(Figure 4-91)

User may choose the action button for further processing.

(Figure 4-92)

<u>Button Description</u>

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.

(Figure 4-93)

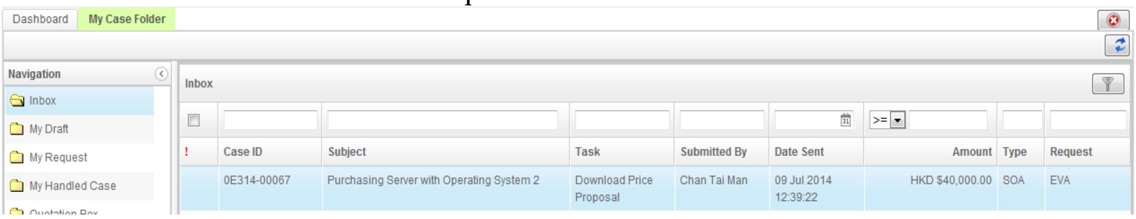
<u>Button Description</u>

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.

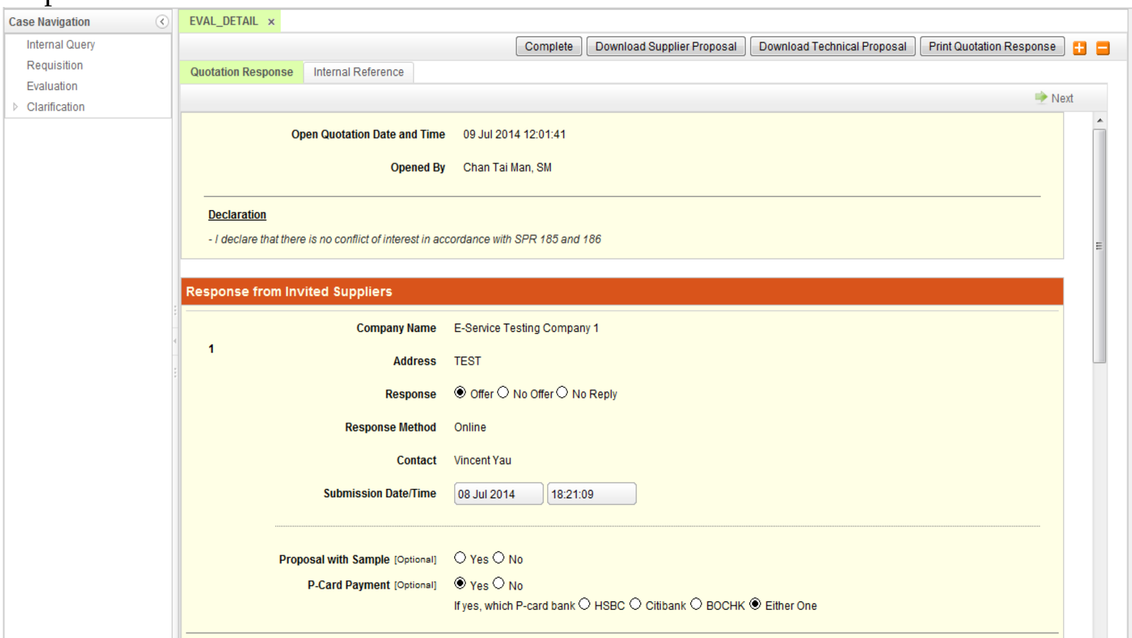
4.5.3.3 Price Evaluation

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)

<u>Button Description</u>

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

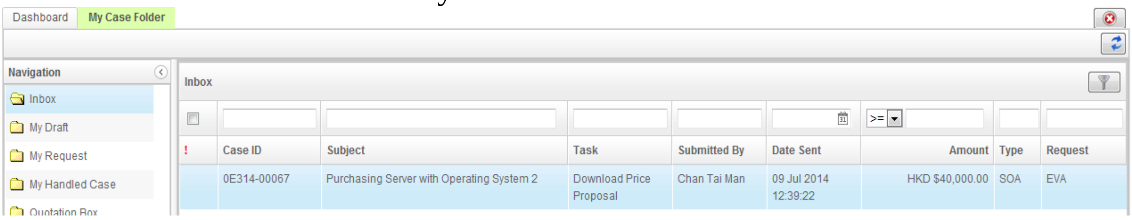
4.6.1 Prepare Clarification

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.

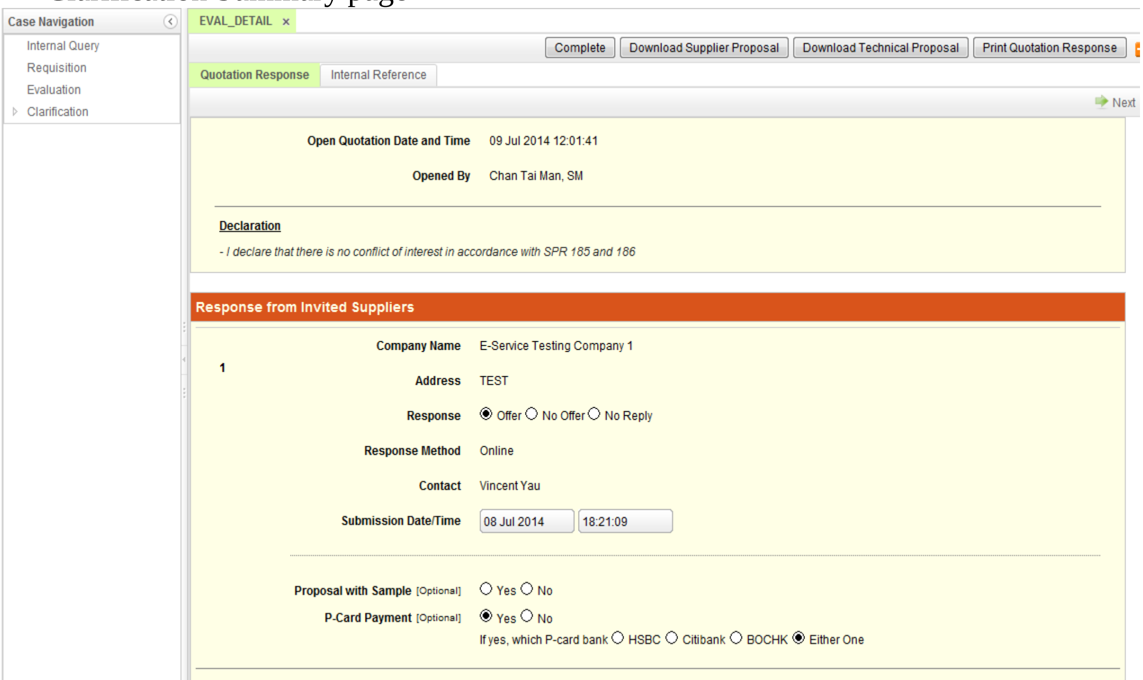
To raise a clarification, please follow the steps below:

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



(Figure 4-97)

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

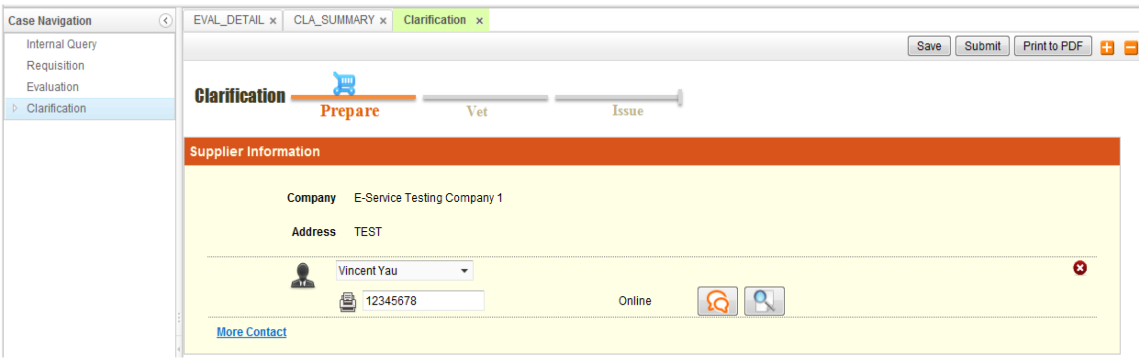


(Figure 4-98)

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.



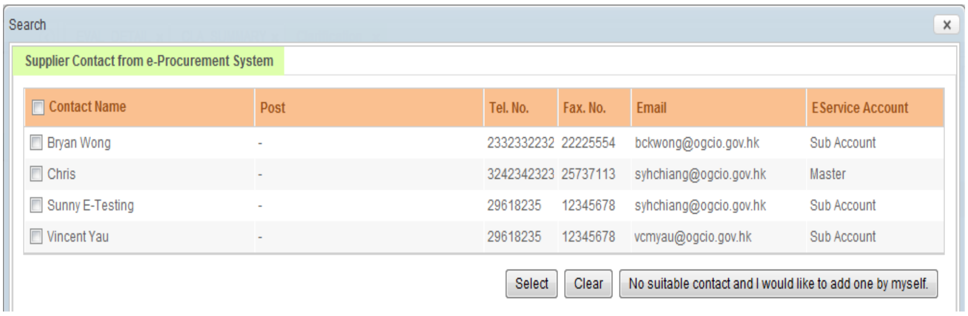
(Figure 4-100)

Data Field Description

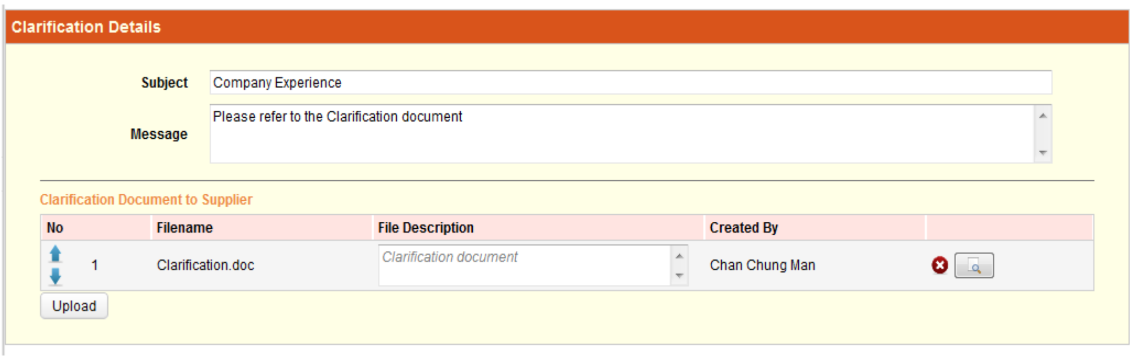
Field Name	Field Description	
Company / Address	The company name and address of the supplier	Non-Editable
	The supplier contact person who will receive the clarification request	Non-Editable
	The supplier contact person fax number	Editable

Button Description

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

<table>
<tr><th>Button</th><th>Button Description</th></tr>
<tr><td>More Contact</td><td>To add contact person for the respective supplier. A pop-up window will be displayed for selection or a new contact creation.


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</td></tr>
<tr><td></td><td>To remove the supplier contact person</td></tr>
</table>

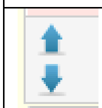


(Figure 4-101)

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

(Figure 4-102)

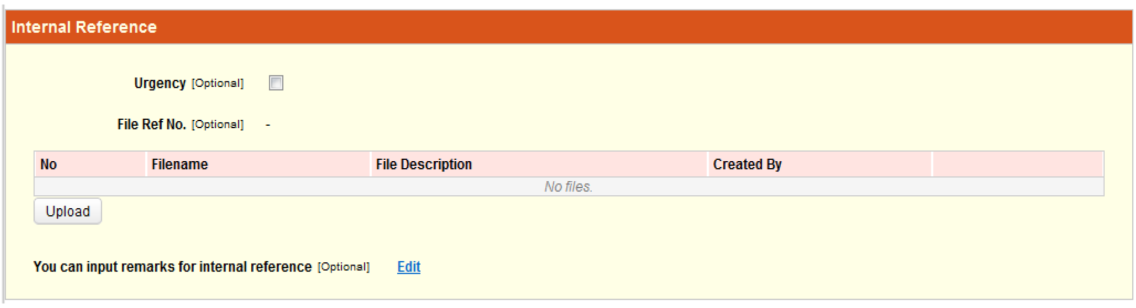
Data Field Description

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

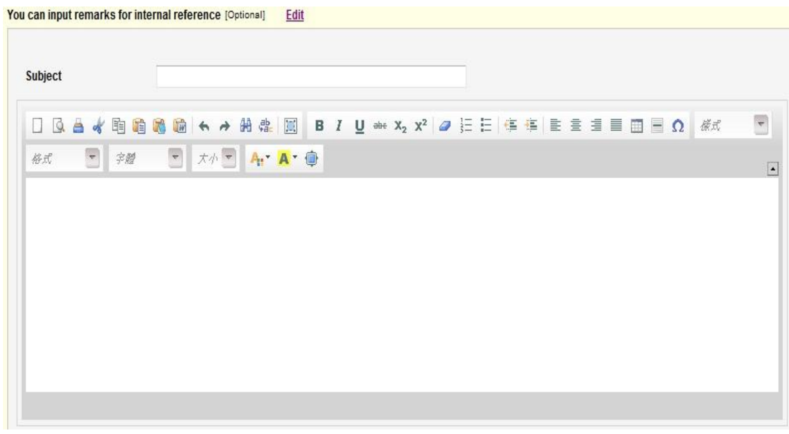
Button	Button Description
Add officer	To add one more officer for Vet Clarification Request When the link is clicked, a new row will be inserted.

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



(Figure 4-103)

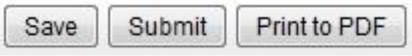
Data Field Description

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	Click **Edit** link to input the remarks in the editor panel.  User may input Subject and Details in the panel. The content can be formatted by using the editor features.	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

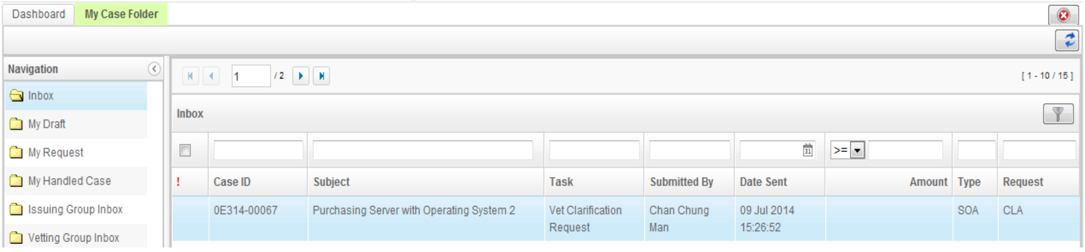
Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed. The request can be found in requestor's My Draft folder.
Submit	To submit the clarification request The system will perform validation on the user's inputs. If the validation is passed 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.

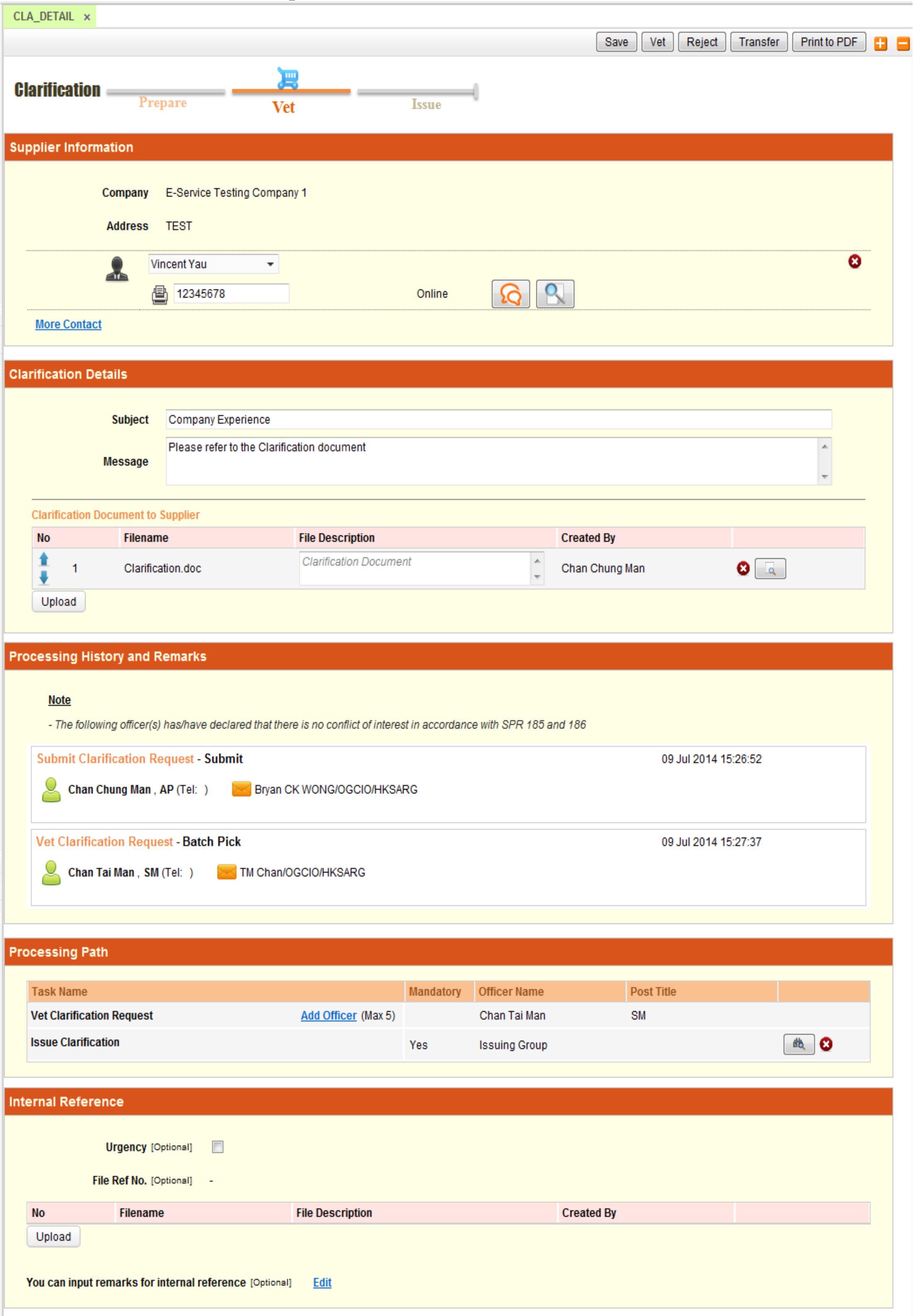
The Vetting Officer may locate the clarification request from the Inbox folder. To perform the vetting, please follow the steps below:

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



(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.



(Figure 4-106)

3. Choose the action buttons for further processing.

(Figure 4-107)

<u>Button Description</u>

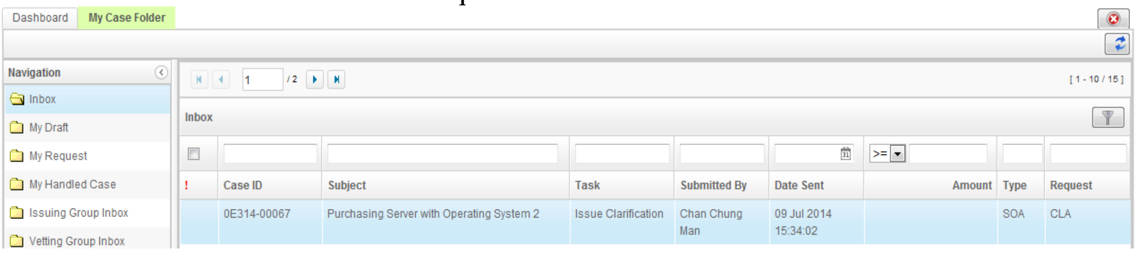
Button	**Button Description**
Save	To save the information inputted After saved, a successful message will be displayed.
Vet	To complete the vetting process The system will perform validation on the user’s inputs. If the validation is passed and the vet action is completed successfully, 1. A successful 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.

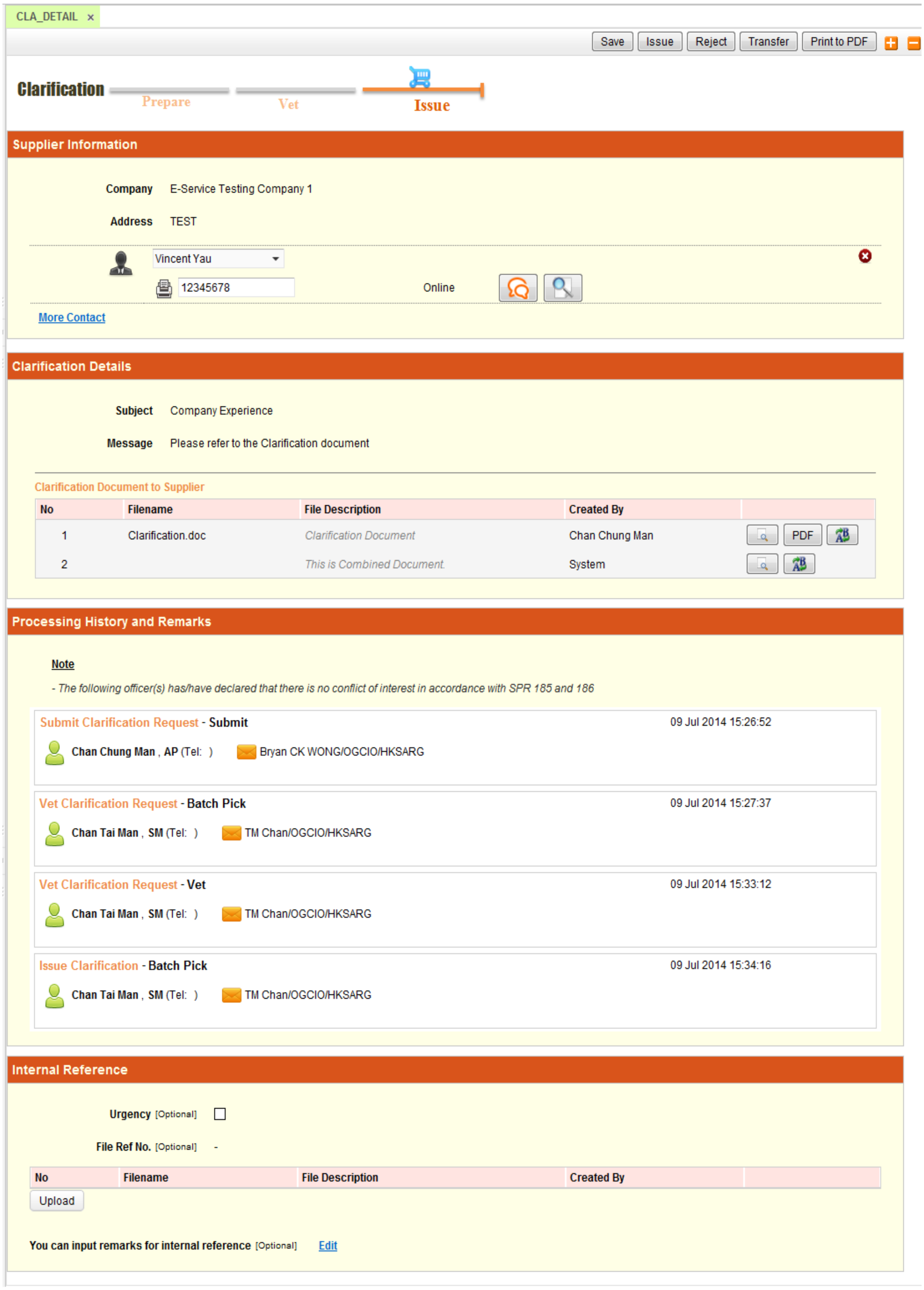
The Issuing Officer may locate the request from the Inbox folder. To perform the clarification issuing, please follow the steps below:

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



(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.


CLA_DETAIL
Save
Issue
Reject
Transfer
Print to PDF
Clarification
Prepare
Vet
Issue
Supplier Information
Company E-Service Testing Company 1
Address TEST
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
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)

<u>Button Description</u>

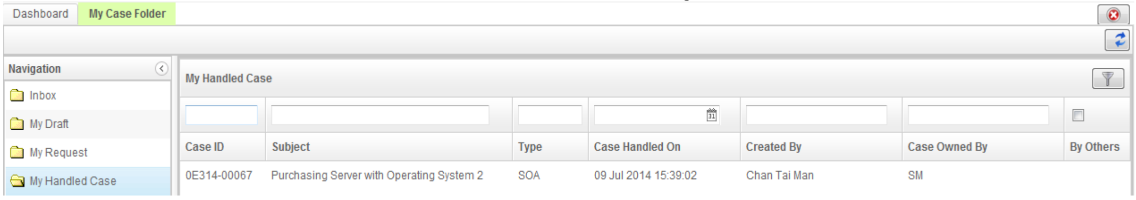
Button	Button Description
Save	To save the information inputted After saved, a successful message will be displayed.
Issue	To issue the clarification to the supplier. The system will perform validation on the user's inputs. If the validation is passed and issue action is completed successfully, 1. A 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

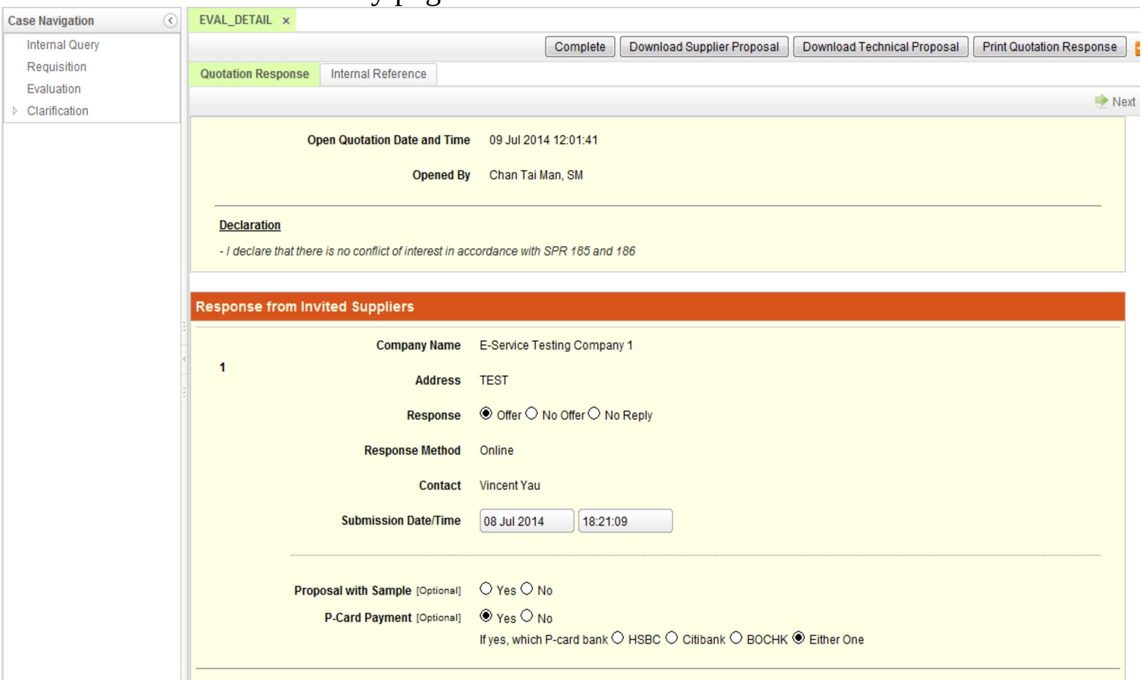
After the supplier replied the clarification, the user should input the clarification response into the system. To input clarification response, please follow the steps below:

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



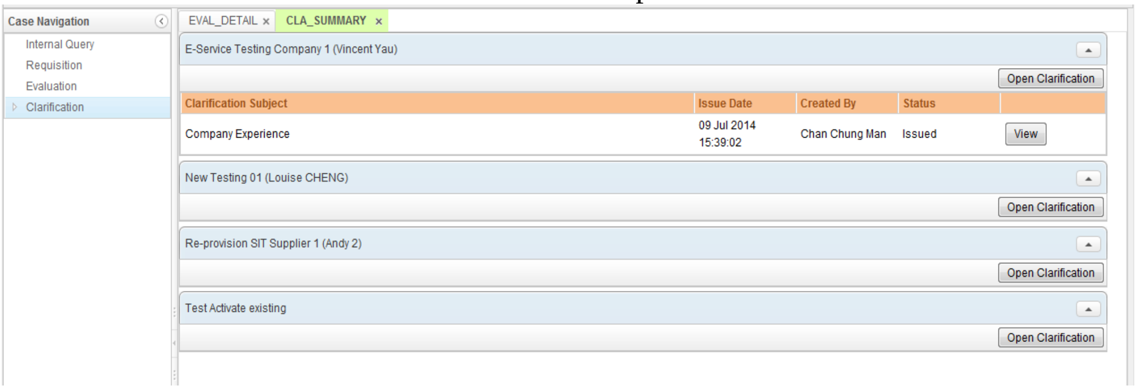
(Figure 4-111)

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



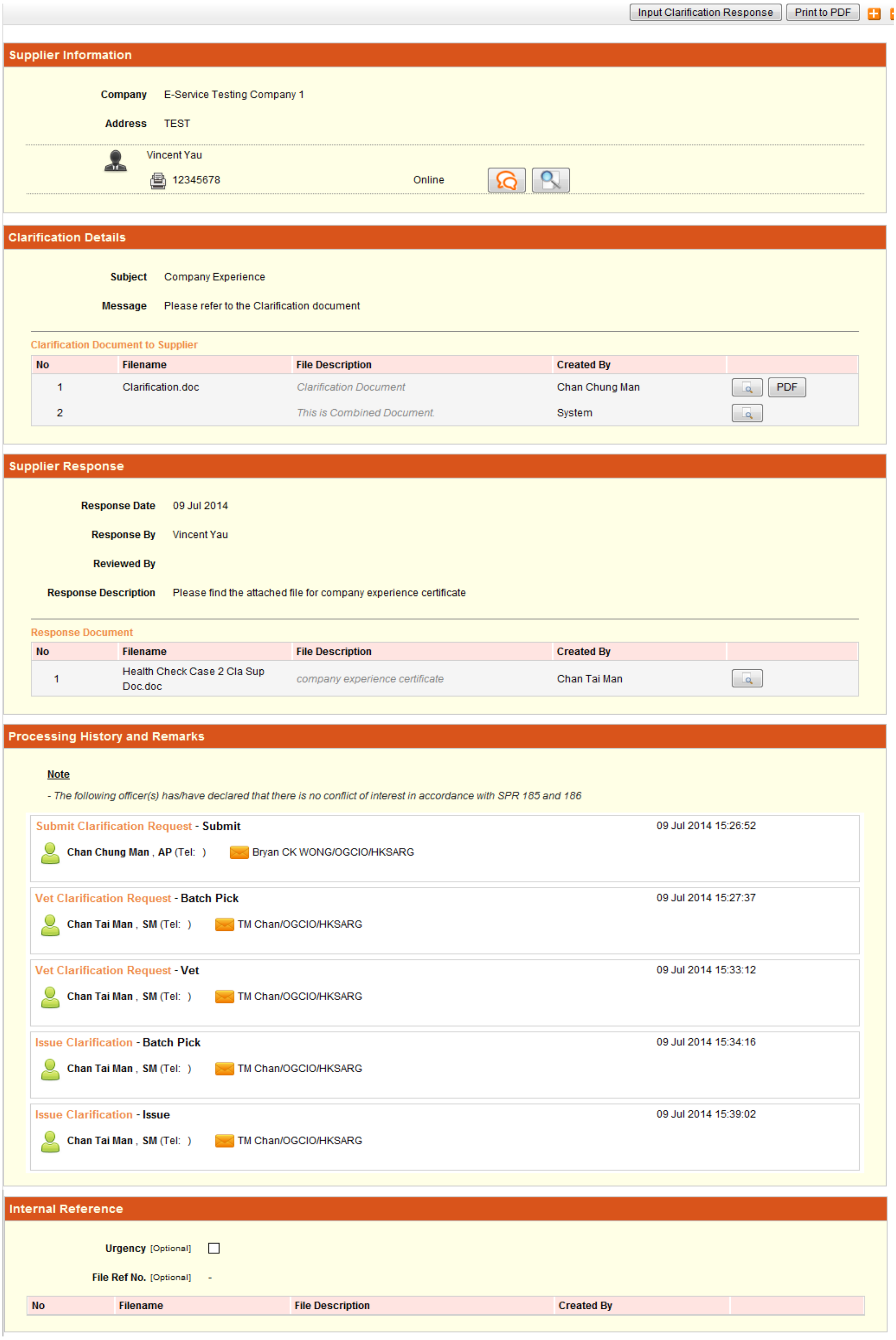
(Figure 4-112)

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



(Figure 4-113)

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



Input Clarification Response | Print to PDF

Supplier Information

Company E-Service Testing Company 1

Address TEST

Vincent Yau

12345678 Online

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	PDF
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

Response Document

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

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

Issue Clarification - **Issue** 09 Jul 2014 15:39:02
Chan Tai Man , **SM** (Tel:) TM Chan/OGCIO/HKSARG

Internal Reference

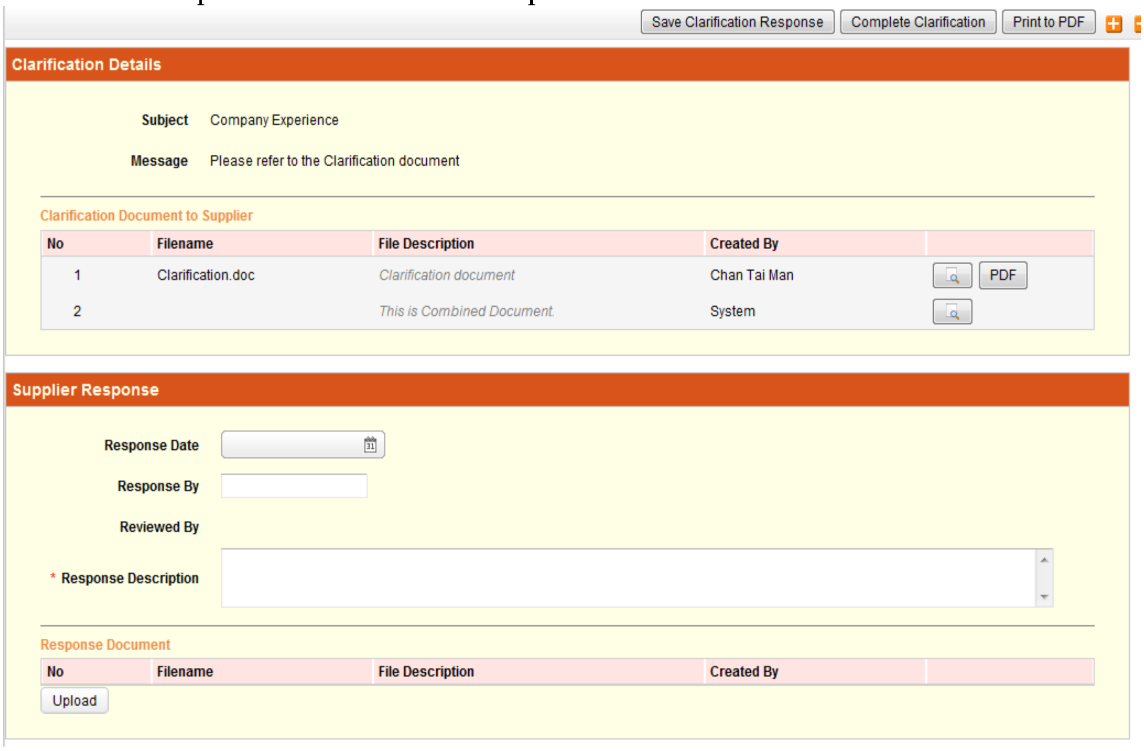
Urgency [Optional] ☐

File Ref No. [Optional] -

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.

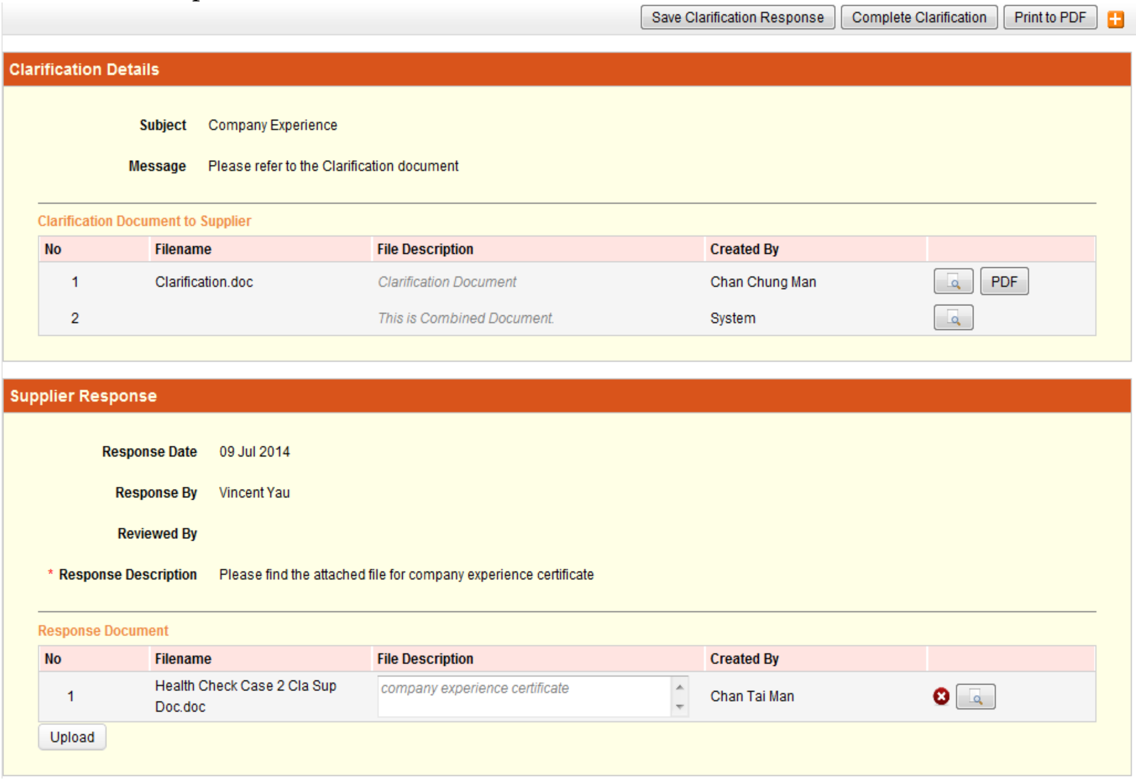


(Figure 4-115)

Data Field Description

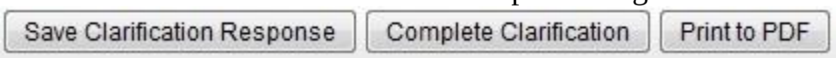
Field Name	Field Description	
Response Date	To display clarification response date	Editable
Response By	To indicate whom (supplier contact) responses the clarification	Editable
Reviewed By	To indicate whom (internal user) reviews the response	Editable
Response Description	Supplier’s response	Editable
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.



(Figure 4-116)

5. Choose the action button for further processing.



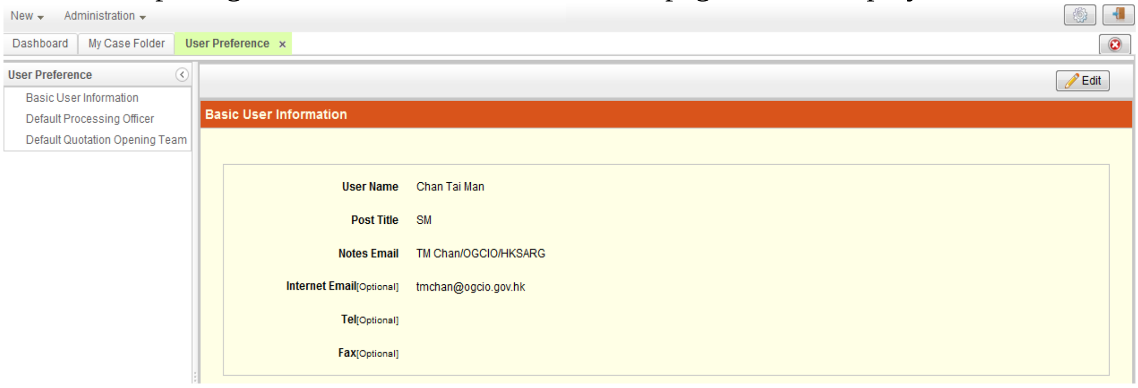
(Figure 4-117)

<u>Button Description</u>

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)

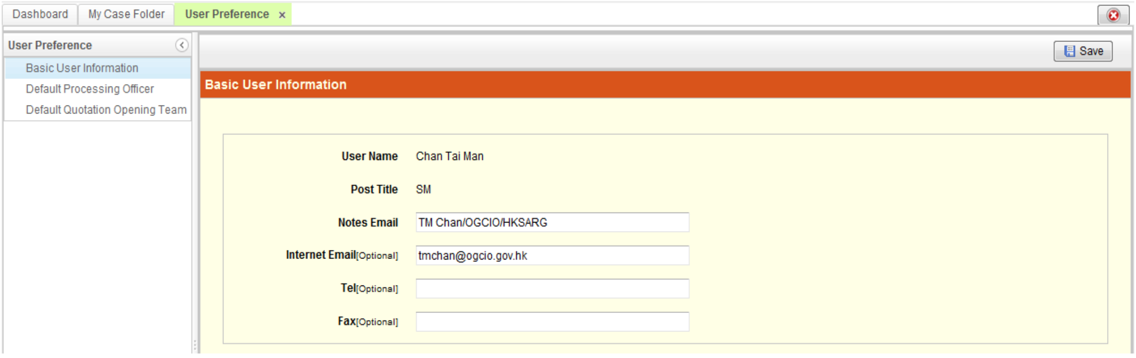
5.1 BASIC USER INFORMATION

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.



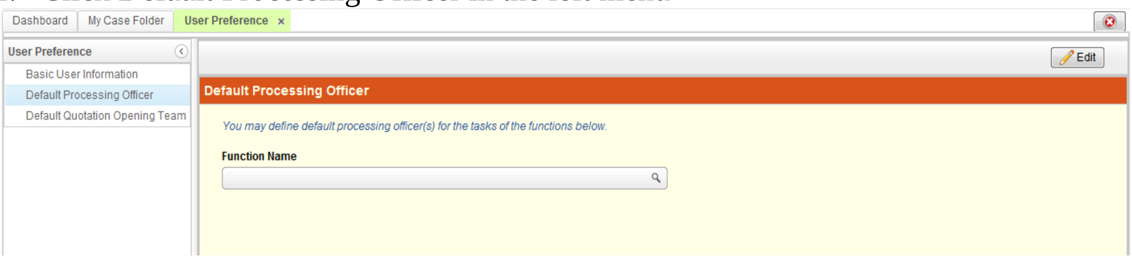
(Figure 5-3)

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

5.2 DEFAULT PROCESSING OFFICER

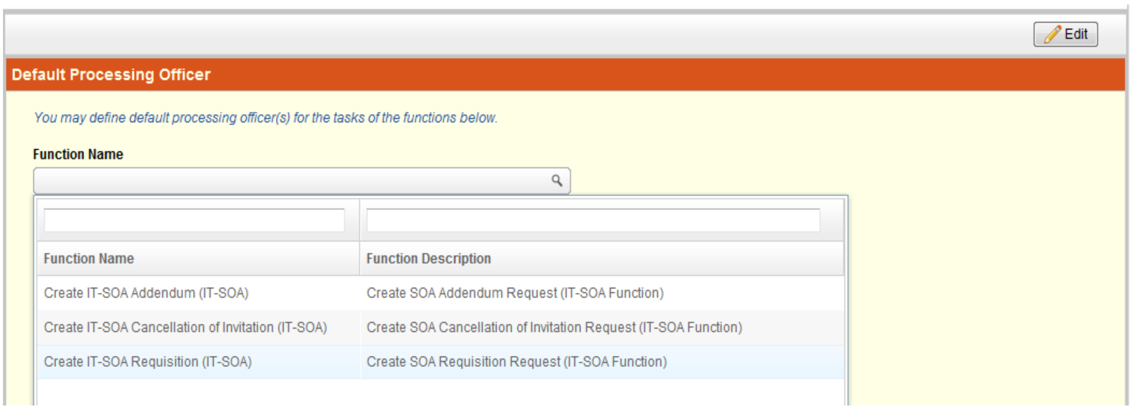
User may define own default processing officer for tasks (Vet and Issue) of functions (create Requisition, Addendum, and Cancellation) by clicking Default Processing Officer in the left menu The default processing officers / user groups will be assigned for corresponding tasks by function. To view/modify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

1. Click Default Processing Officer in the left menu



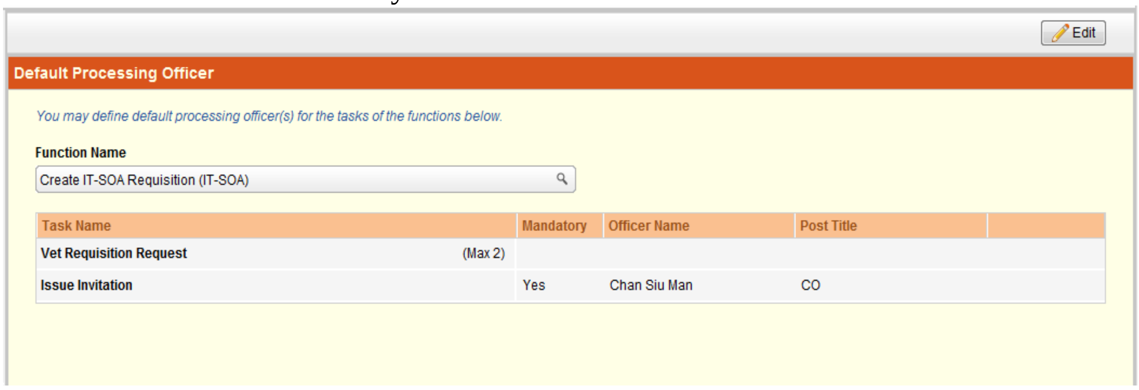
(Figure 5-4)

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



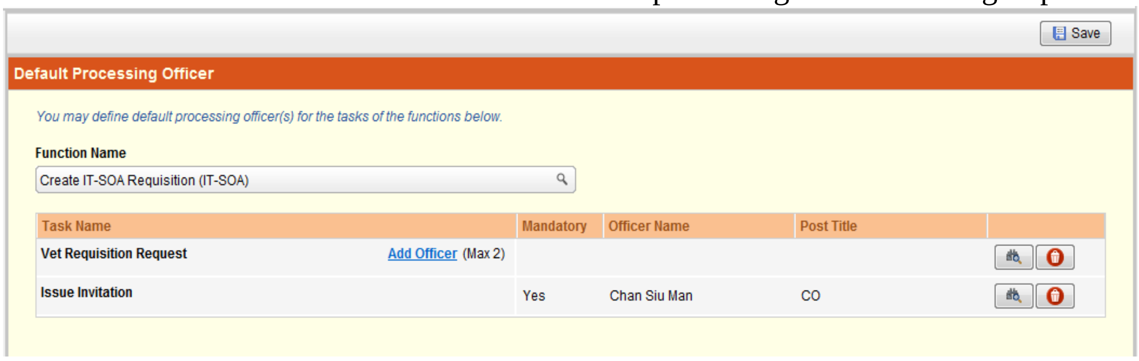
(Figure 5-5)

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



(Figure 5-6)

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



(Figure 5-7)

<u>Button Description</u>

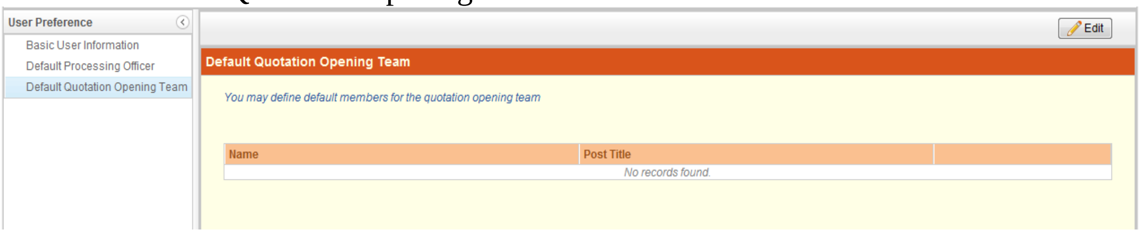
Button	Button Description
	To search officer / group and assign to process the task When the button is clicked, Search User / User Group window pops up. After an officer / a user group searched and selected, the details of information show in the table. For details on search user, please refer to the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

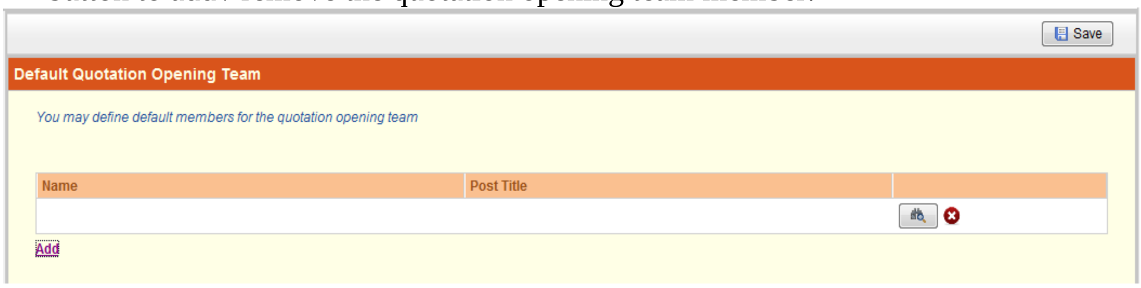
User may define default quotation opening team for requisition by clicking Default Quotation Opening Team in the left menu. The default quotation opening team will be assigned for requisition creation. To view/modify the Default Quotation Opening Team, please follow the steps below:

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)

<u>Button Description</u>

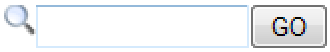
Button	Button Description
	To search officer / group and assign to quotation opening team When the button is clicked, Search User / User Group window pops up. After an officer / a user group searched and selected, the details of information show in the table. For details on search user, please refer 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

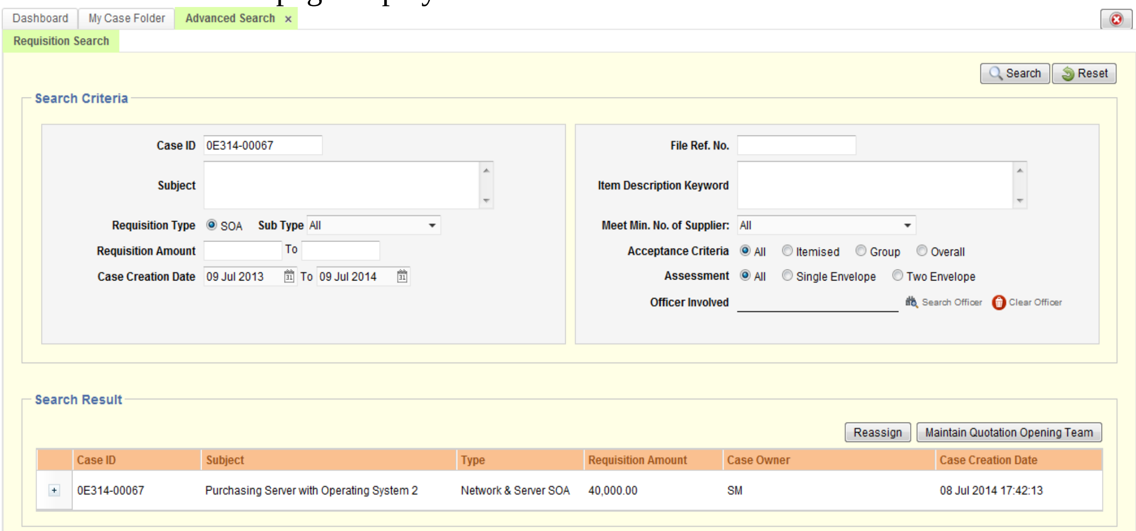
User may search case using Basic Search function by inputting the whole case number and clicking **GO** button if case number is known. Then, the case will be open in the new tab page.



(Figure 6-1)

6.2 ADVANCED SEARCH

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



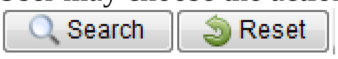
(Figure 6-2)

<u>Search Criteria - Data Field Description</u>

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	Handler of the request 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 Also, user may remove the officer by clicking **Clear Officer** button

User may choose the action button for further processing.



(Figure 6-3)

<u>Button Description</u>

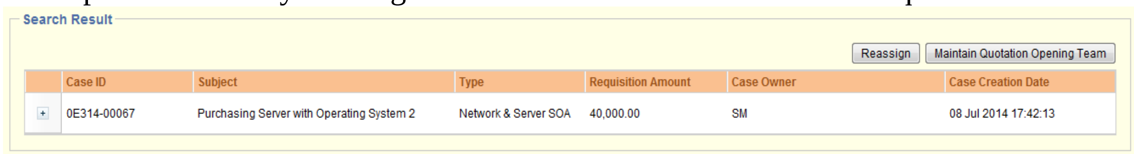
Button	**Button Description**
Search	To perform searching based on input criteria.
Reset	To clear the inputted criteria and search result

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

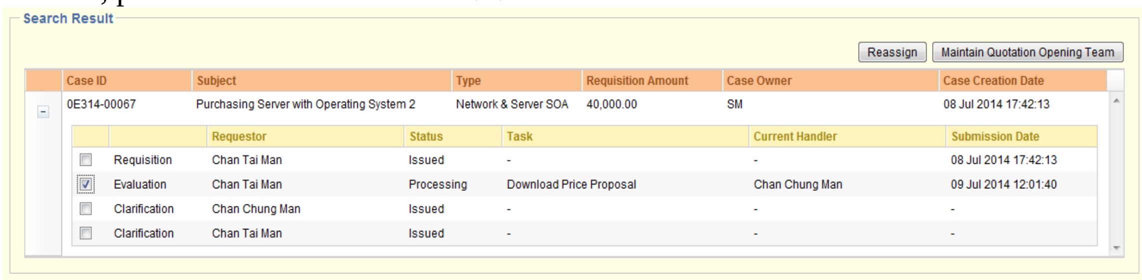
In some occasions, the current handler may not be available to handle the request immediately. If necessary, the requestor may reassign the request to another officer to handle. To reassign the request, please follow the steps below:

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



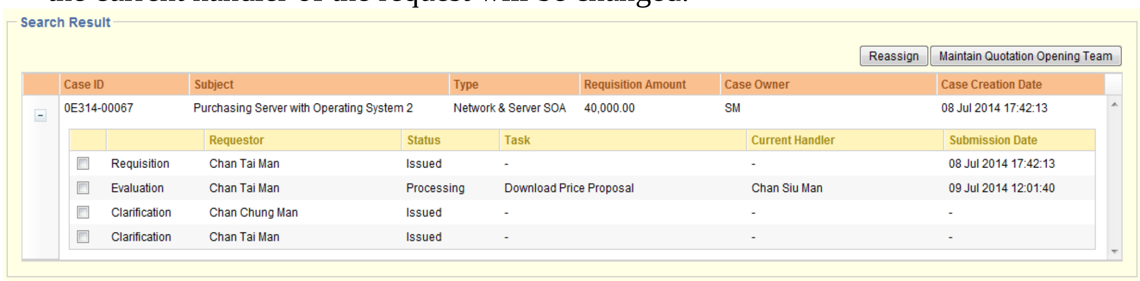
(Figure 6-4)

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



(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.



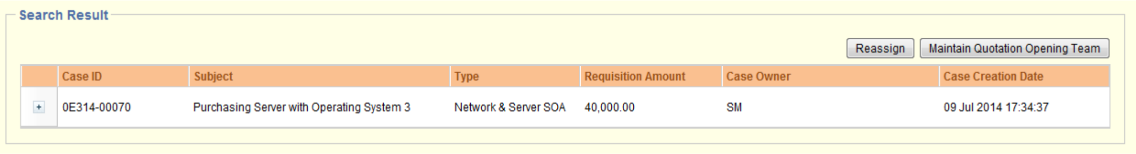
(Figure 6-6)

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

6.2.2 Maintain Quotation Team Member

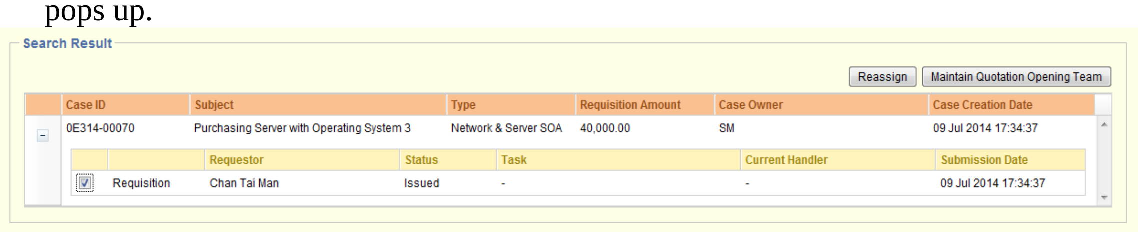
Under some situations, the quotation opening team member of the requisition need to change after the invitation of quotation issued and before closing date time. If necessary, the requestor may maintain the quotation team member of the requisition which is under waiting for quotation status. To maintain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



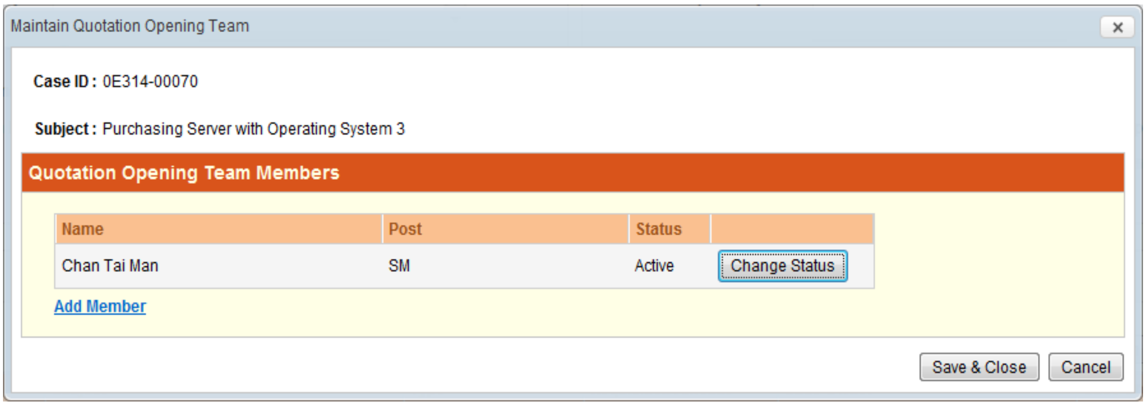
(Figure 6-7)

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



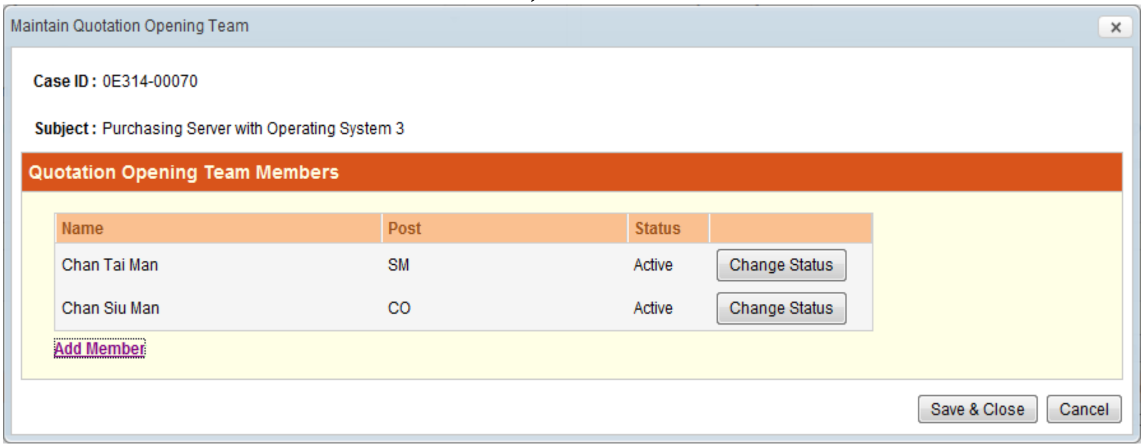
(Figure 6-8)

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



(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)

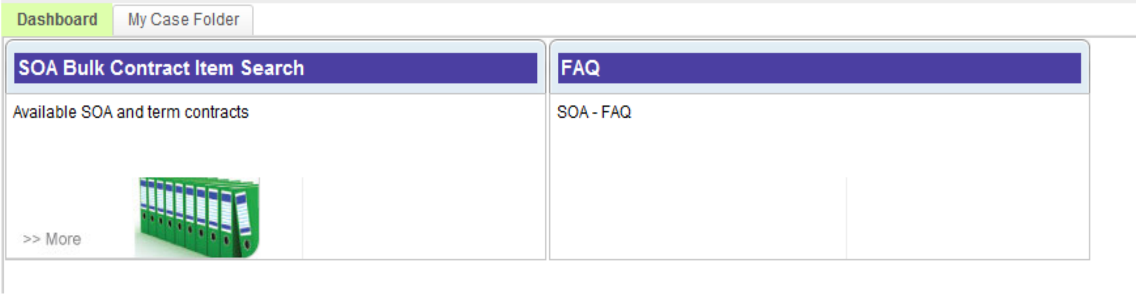
5. Click **Save & Close** button to save the inputted

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

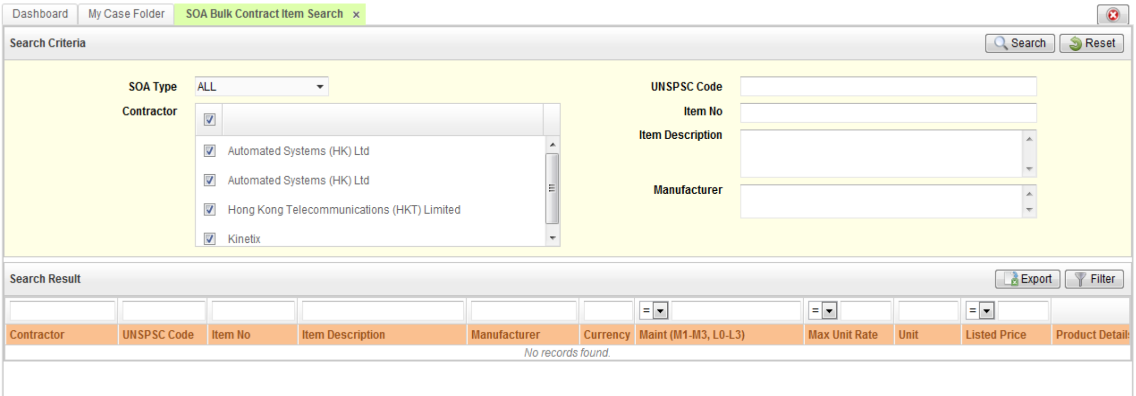
To facilitate user to have more information on items provided by suppliers under SOA Term Contract, SOA Bulk Contract Item Search function is available in Dashboard tab. To search bulk contract item, please follow the steps below:

1. Click Dashboard tab page



(Figure 6-11)

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



(Figure 6-12)

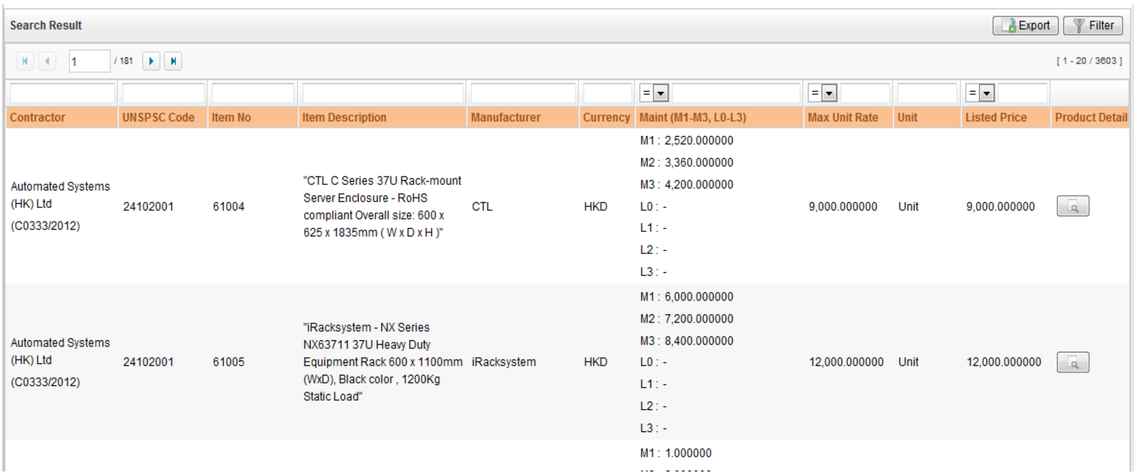
Data Field Description (Searching Widget)

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

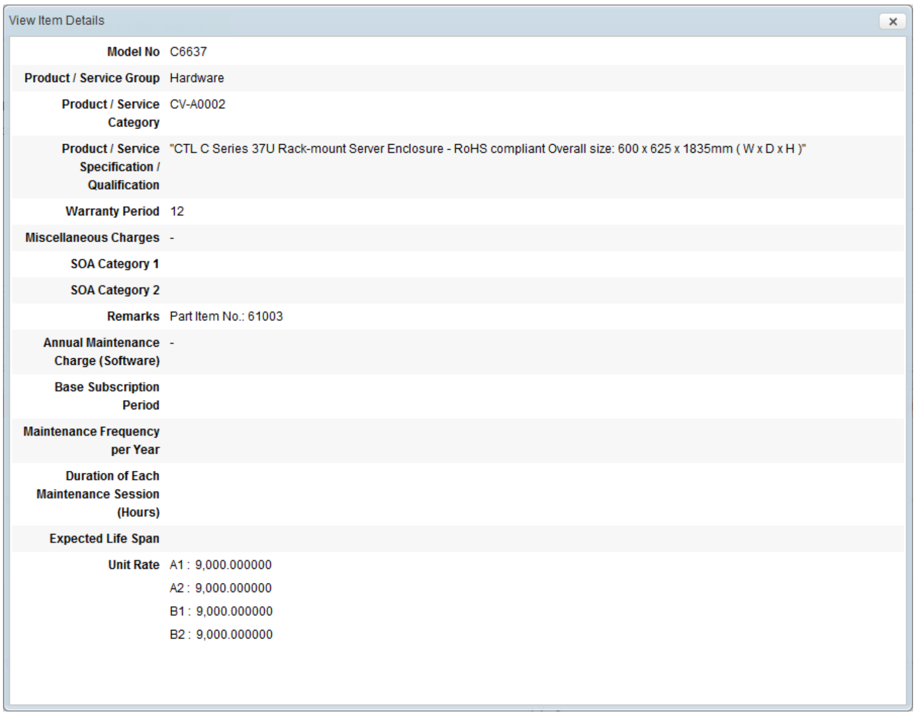
After **Search** button clicked, a list of result generated and displays in the Search Result section. Further filtering on search result is available by inputting keyword in the upper areas of the column heading and clicking **Filter** button. Also, export function is available to export the searching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



(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

<table>
<tr><th>Field Name</th><th>Field Description</th></tr>
<tr><td>Product Details</td><td>Click button to view the item details as below:


</td></tr>
</table>

<u>Button Description (Search Result)</u>

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

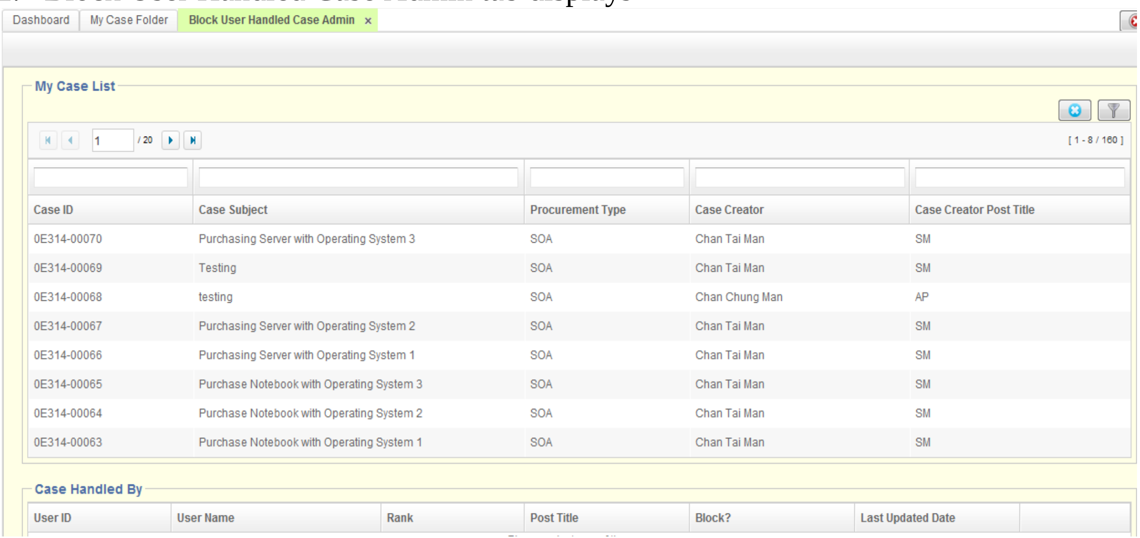
7.1 BLOCK USER HANDLED CASE ADMIN

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.

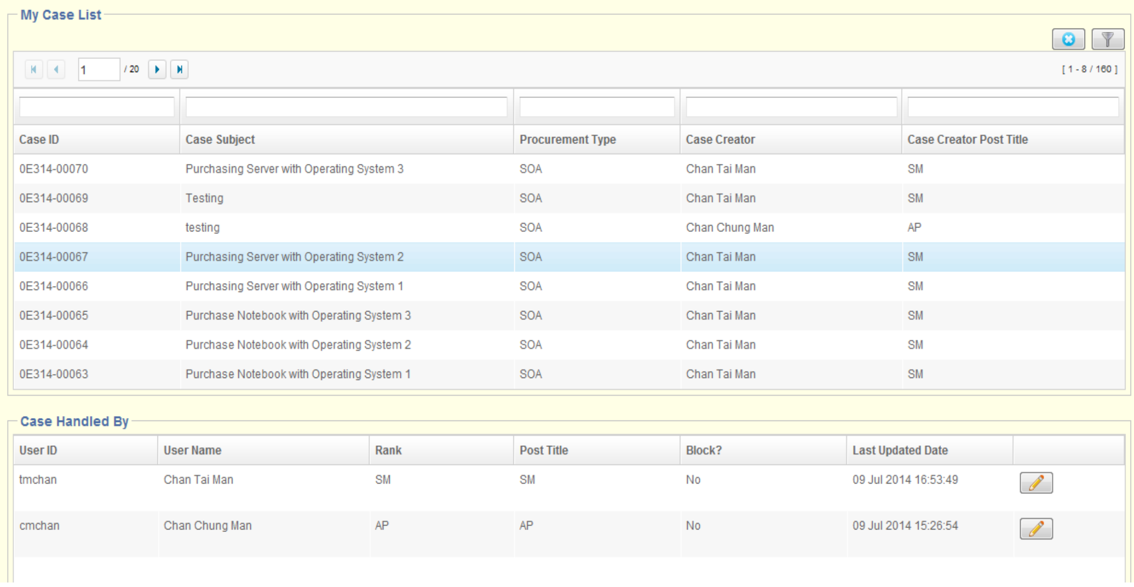
(Figure 7-1)

2. Block User Handled Case Admin tab displays



(Figure 7-2)

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



My Case List

1 / 20 [1 - 8 / 160]

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

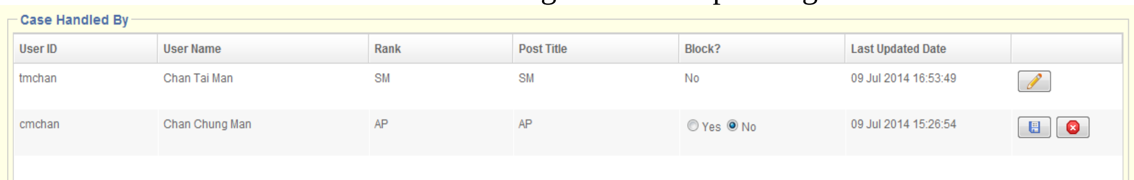
Case Handled By

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



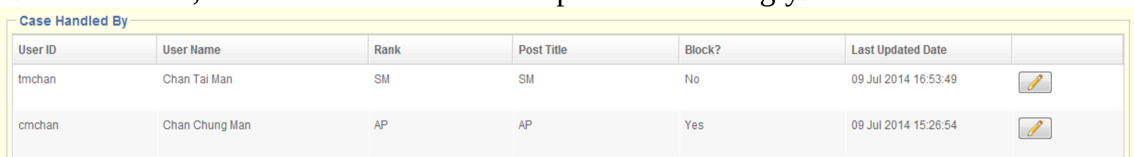
Case Handled By

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	Yes 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.



Case Handled By

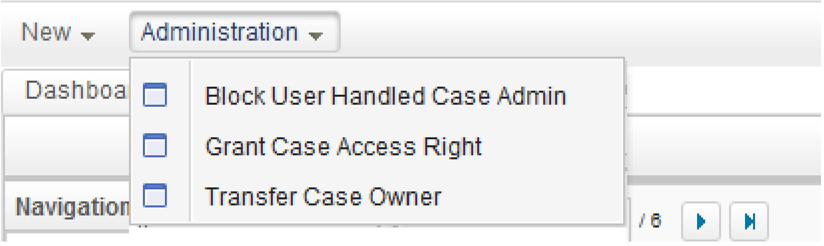
User ID	User Name	Rank	Post Title	Block?	Last Updated Date	
tmchan	Chan Tai Man	SM	SM	No	09 Jul 2014 16:53:49	
cmchan	Chan Chung Man	AP	AP	Yes	09 Jul 2014 15:26:54	

(Figure 7-5)

7.2 GRANT CASE ACCESS RIGHT

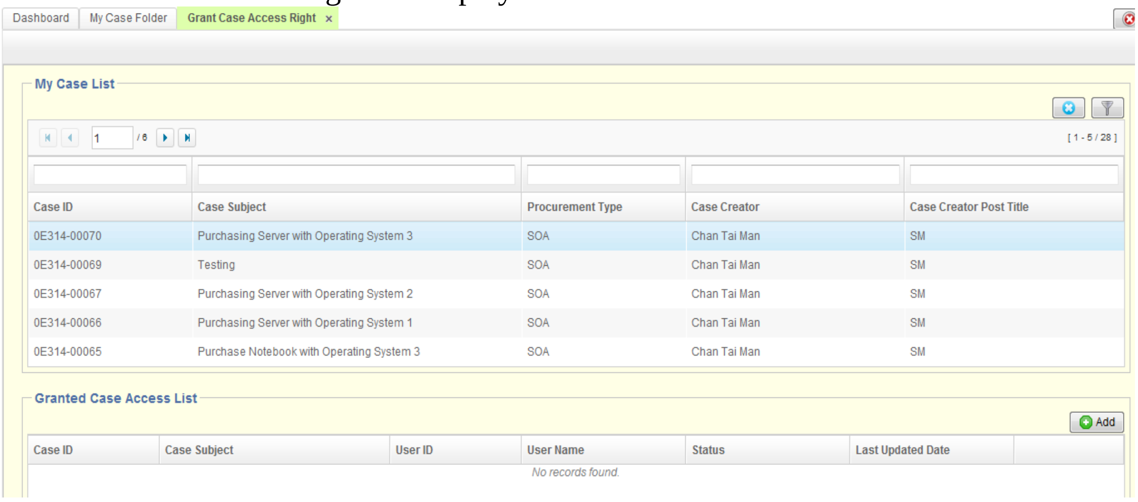
If an officer (not the handler) has to access the case for operational needs, the case owner may grant access right of the case to the officer. To perform the function, please follow the steps below:

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



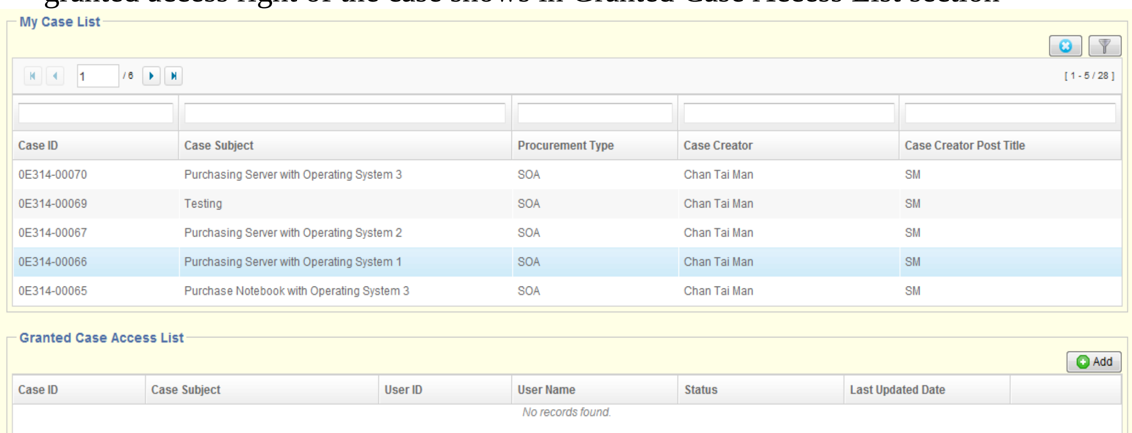
(Figure 7-6)

2. Grant Case Access Right tab displays



(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



(Figure 7-8)

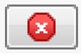
If the access right for the officer has granted, **Grant** will shows under Status column. Otherwise, **Revoke** will show.

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.

(Figure 7-9)

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

(Figure 7-10)

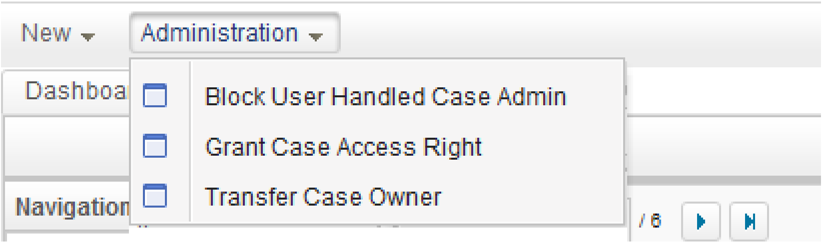
Click **Grant** to grant or **Revoke** to remove the access right for the corresponding officer. Then, click  button to save the editing or  button to cancel the editing.

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

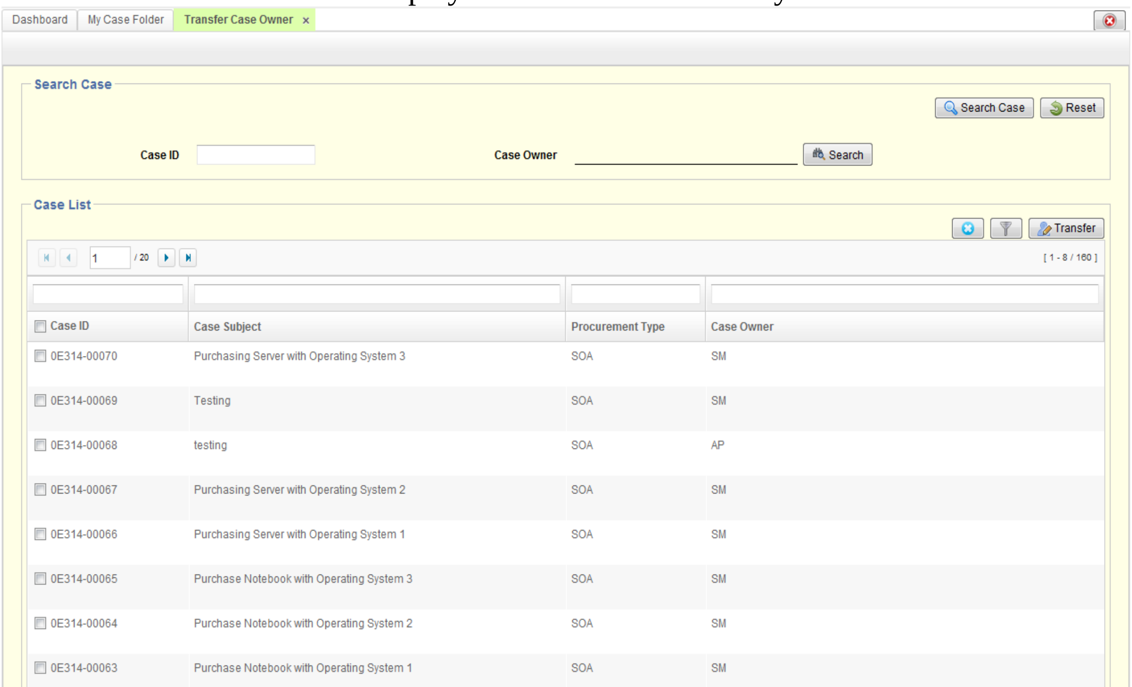
In some occasions, the case owner need to transfer case ownership to another officer (e.g. the case owner is going to post out). To perform the function, please follow the steps below:

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



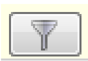
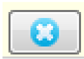
(Figure 7-11)

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

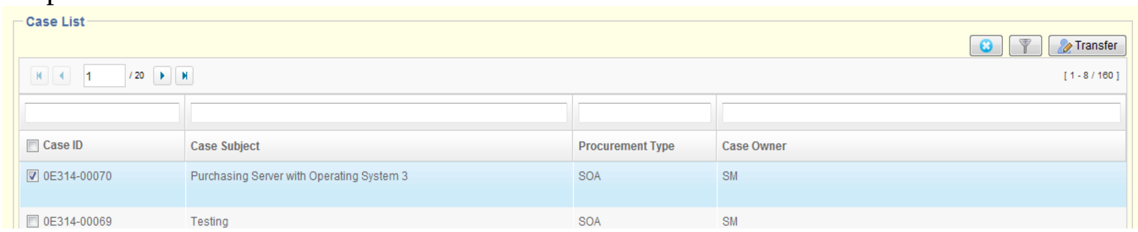


(Figure 7-12)

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

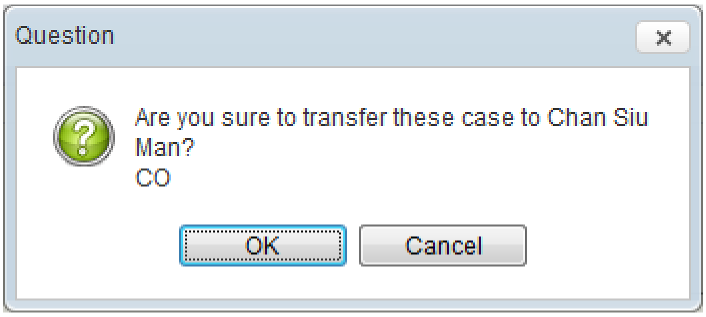
Input case information in the upper areas of column heading to perform filtering by clicking  button if necessary. Click  to clear case information from the upper areas of column heading.

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.



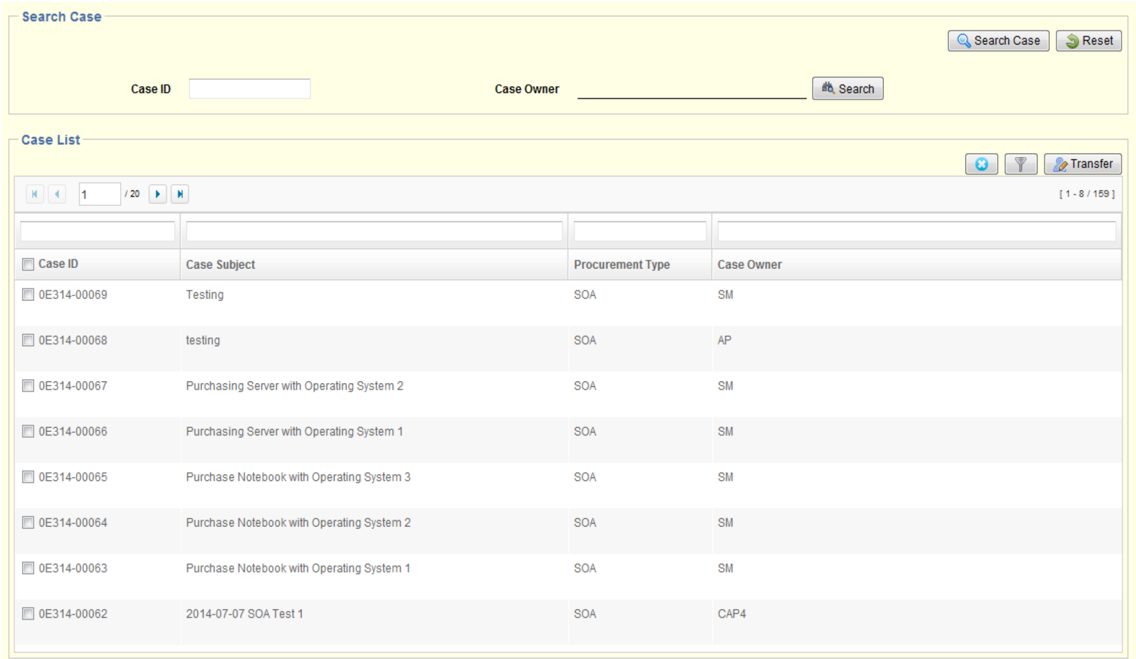
(Figure 7-13)

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.

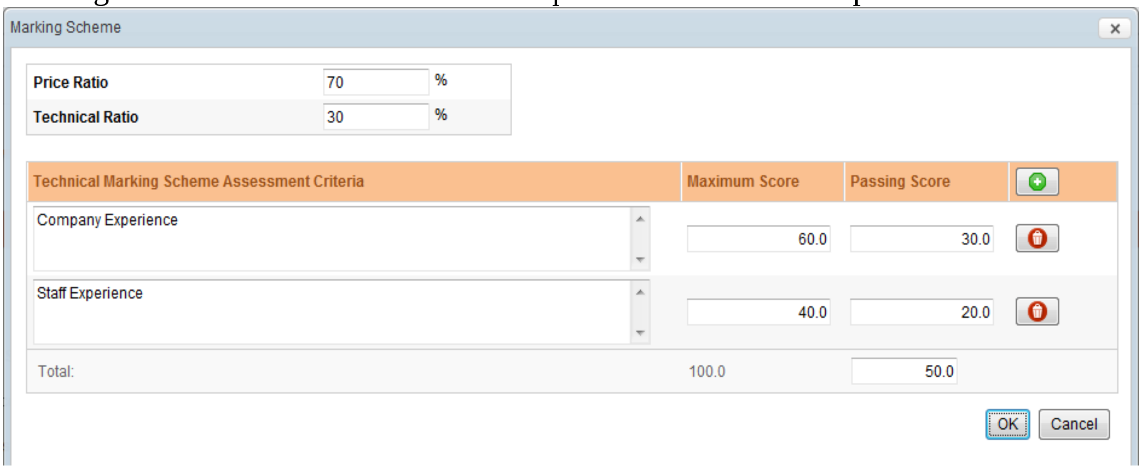


(Figure 7-15)

8. MISCELLANEOUS FUNCTIONS

8.1 MARKING SCHEME

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



(Figure 8-1)

<u>Data Field Description</u>

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

<u>Button Description</u>

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

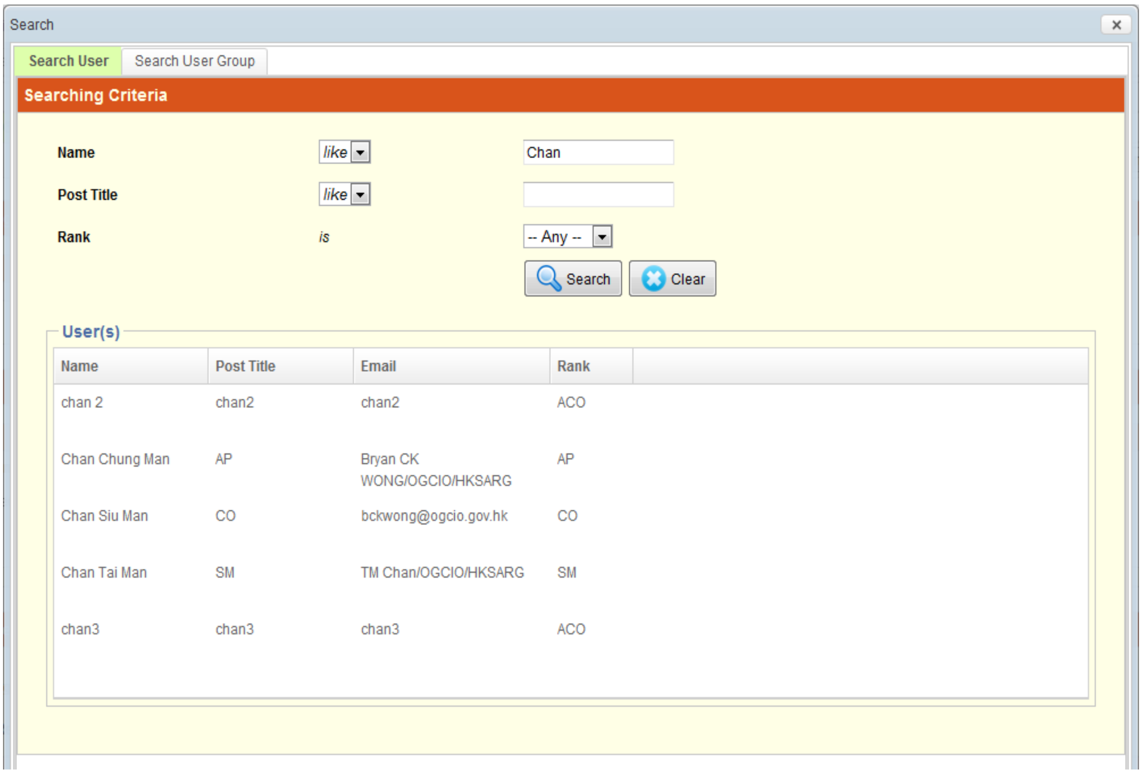
Button	**Button Description**
OK	To save the information inputted The system will perform validation on user’s inputs.
Cancel	To cancel the information inputted and return to the previous screen

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



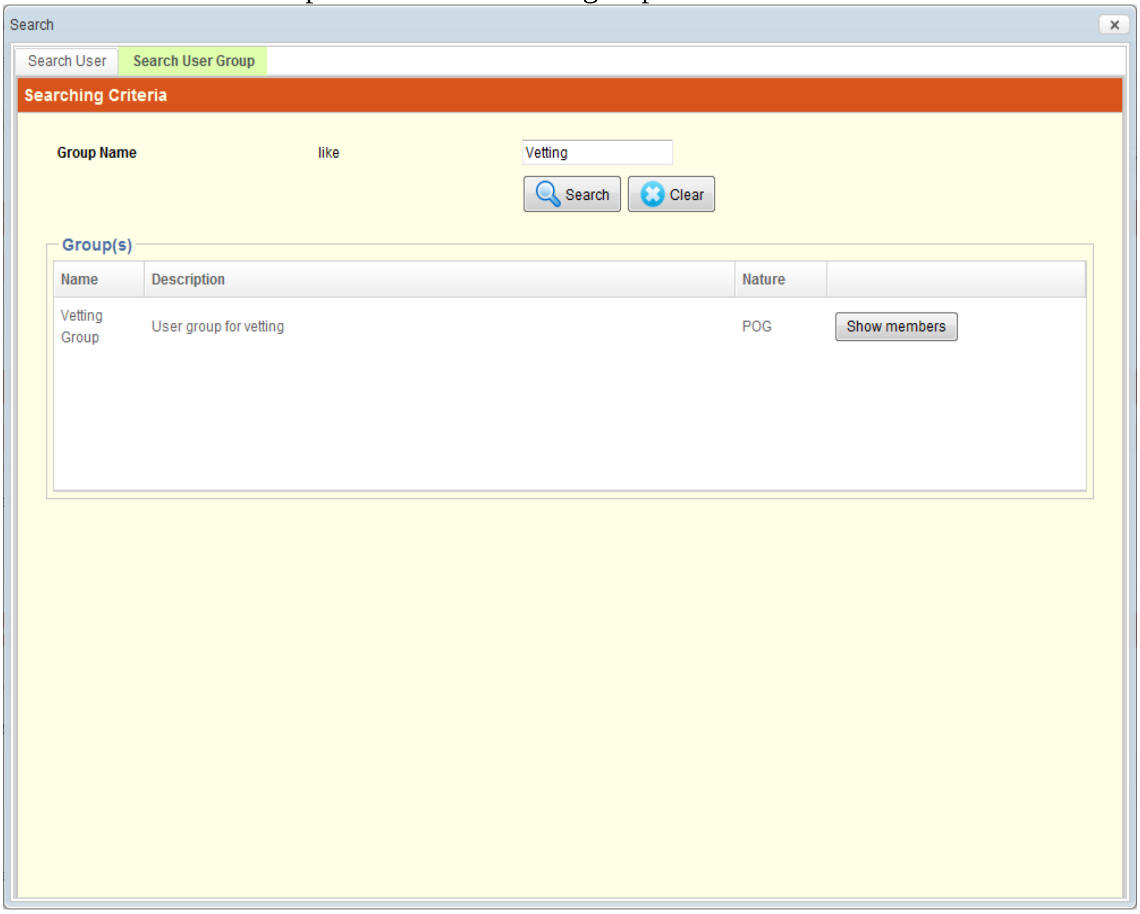
(Figure 8-2)

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



(Figure 8-3)

Data Field Description (Search User Group)

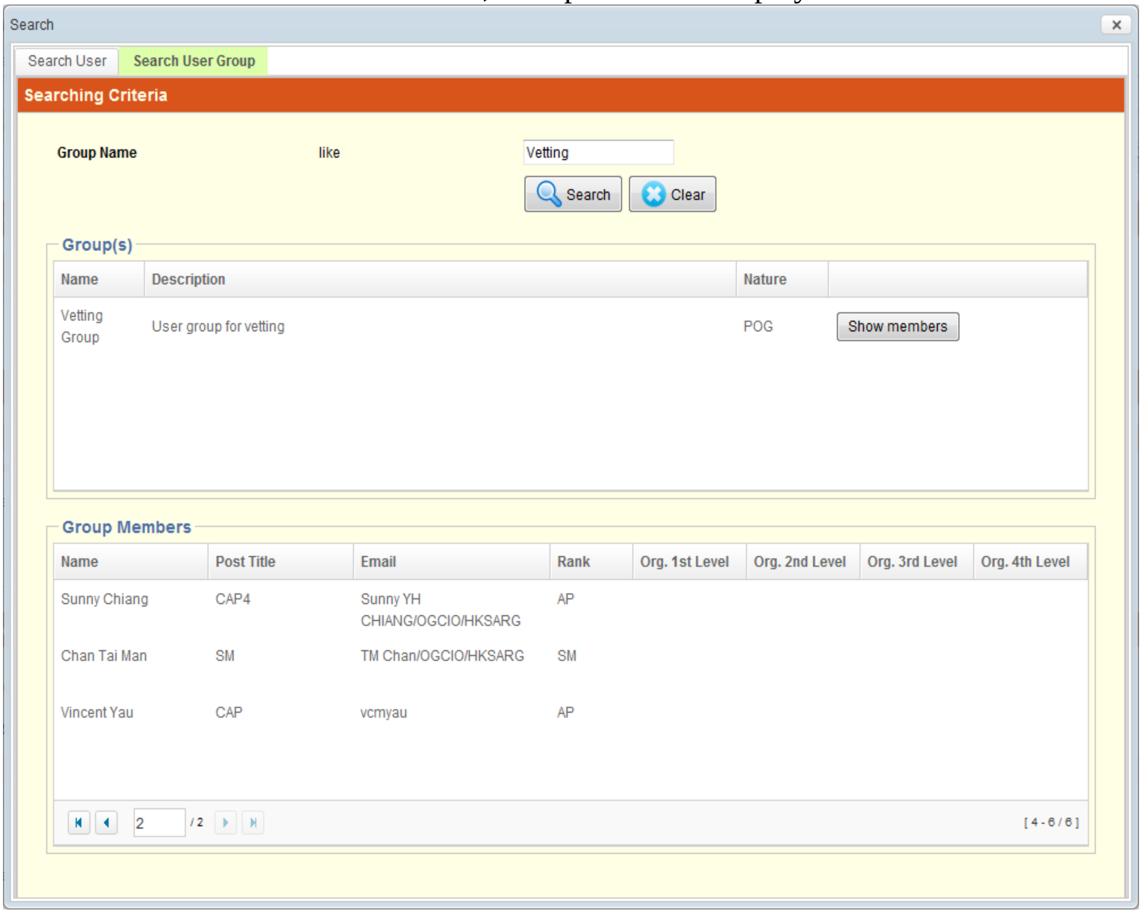
Field Name	Field Description
Group Name / Name	User group name. It allows keyword search.
Description	User group description
Nature	User group nature (e.g. POG means processing group)

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)

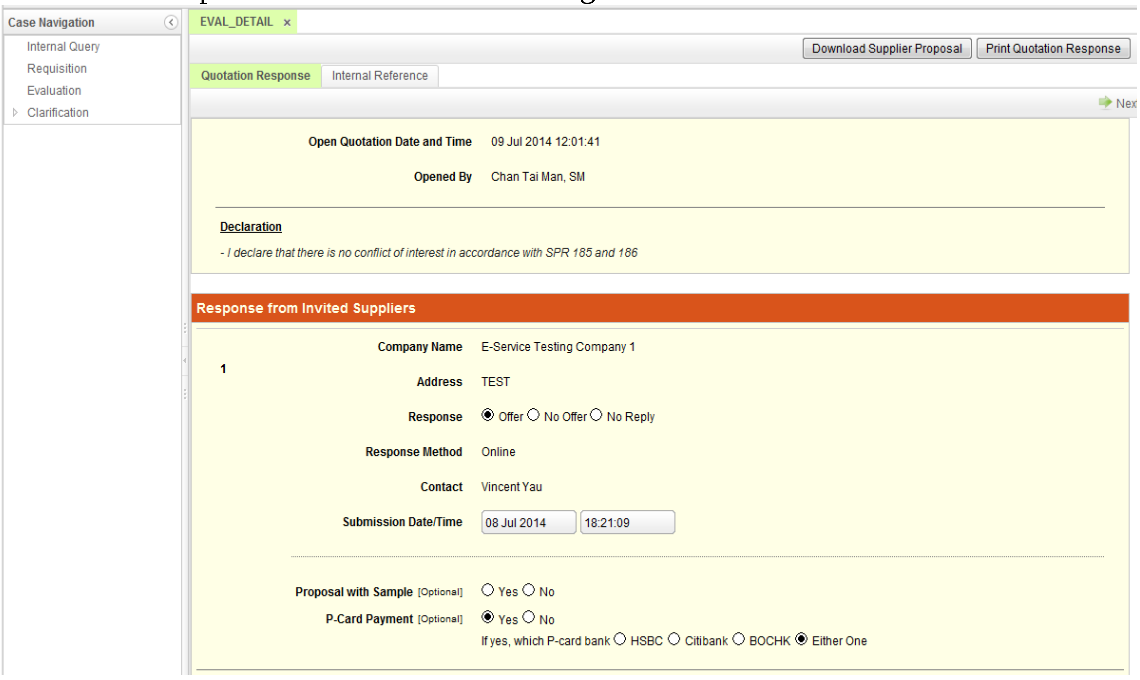
Field Name	Field Description
Name	Officer name
Post Title	Officer post title
Email	Officer Notes email address
Rank	Officer rank

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:

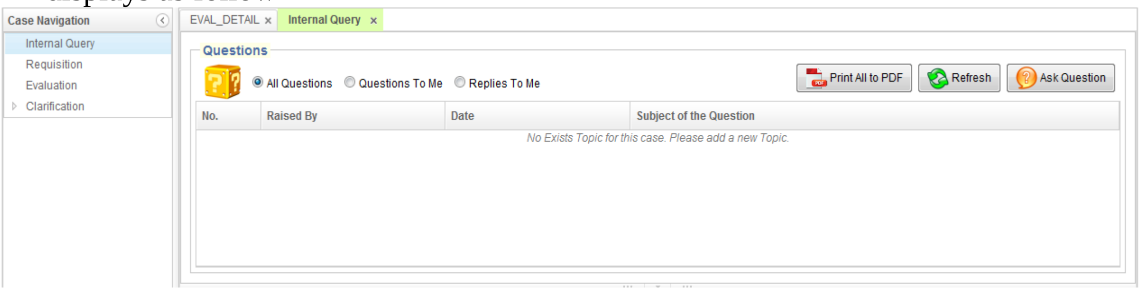
8.3.1 Raise Internal Query

1. Select and open a case to show Case Navigation



(Figure 8-5)

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



(Figure 8-6)

<u>Data Field Description (Internal Query)</u>

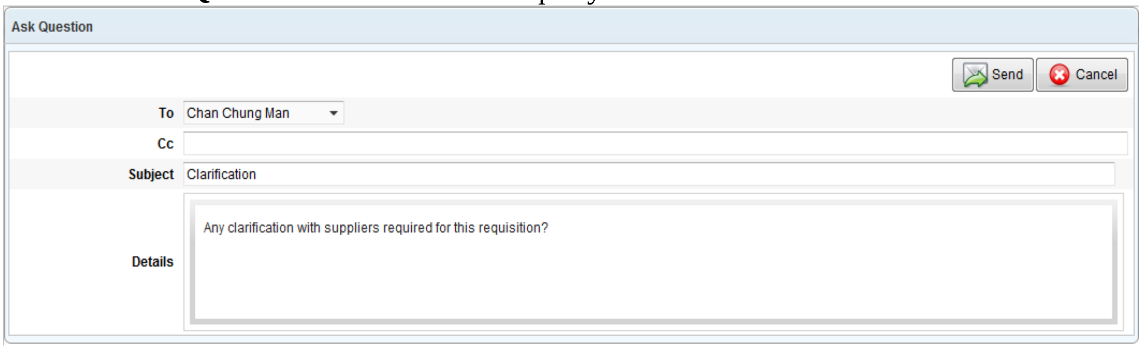
Field Name	Field Description
No.	Question No.

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



(Figure 8-7)

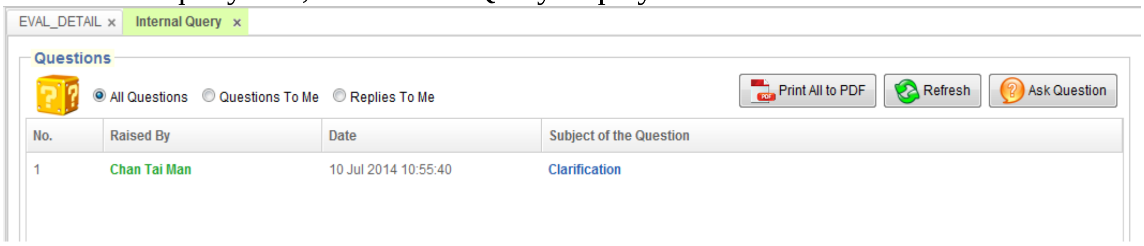
Data Field Description (Ask Question)

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.

<u>Button Description (Ask Question)</u>

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

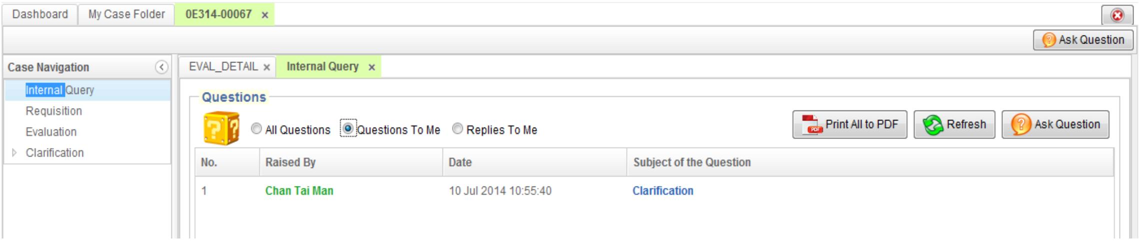


(Figure 8-8)

8.3.2 Reply Internal Query

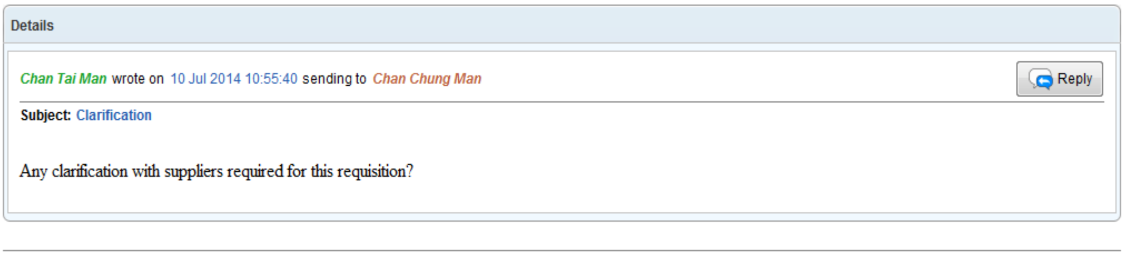
1. Repeat Section 8.3.1 Step 1 and 2

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



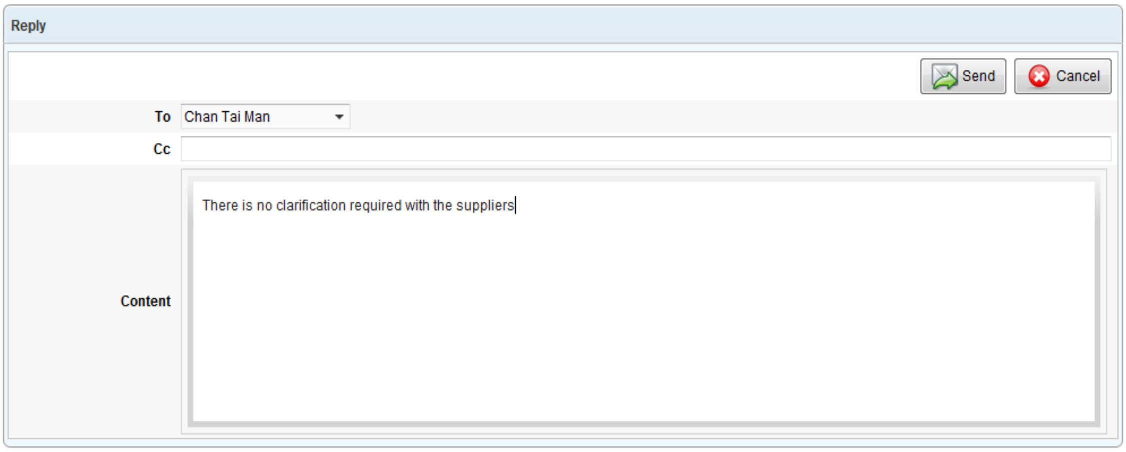
(Figure 8-9)

3. Select the question to show the question details



(Figure 8-10)

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



(Figure 8-11)

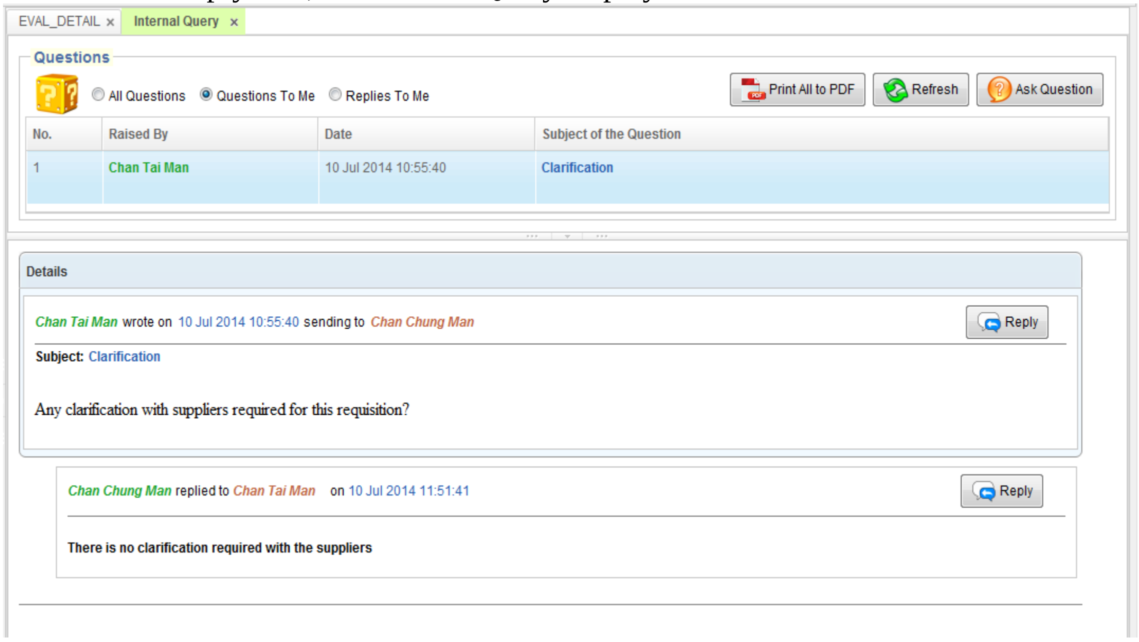
Data Field Description (Ask Question)

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

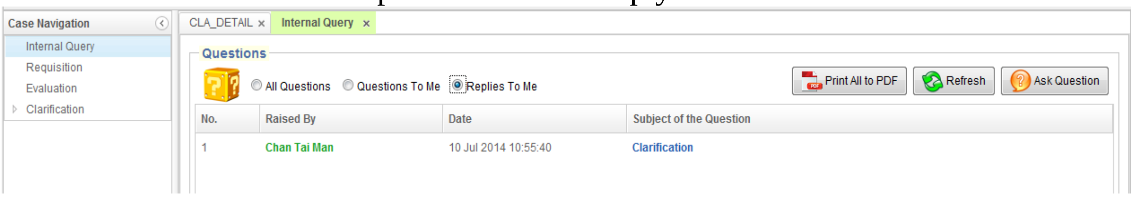


(Figure 8-12)

8.3.3 View Reply Details

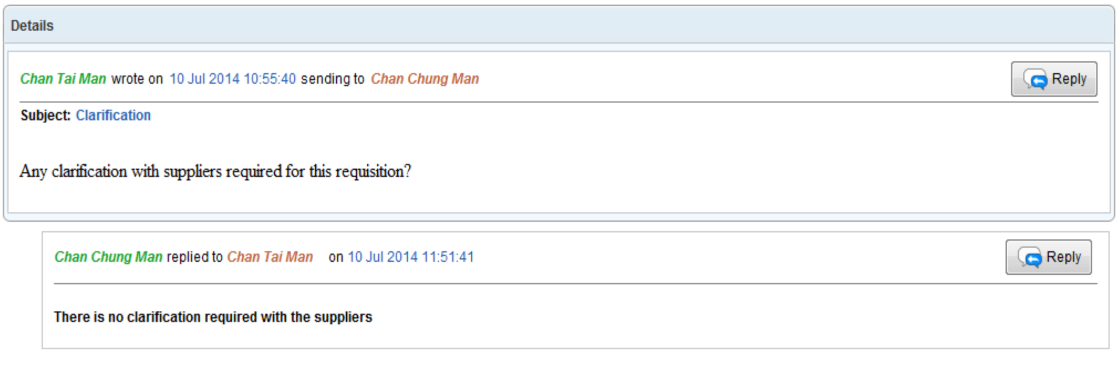
1. Repeat Section 8.3.1 Steps 1 and 2

2. Click the radio button Replies To Me. The reply in Section 8.3.2 shows.



(Figure 8-13)

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



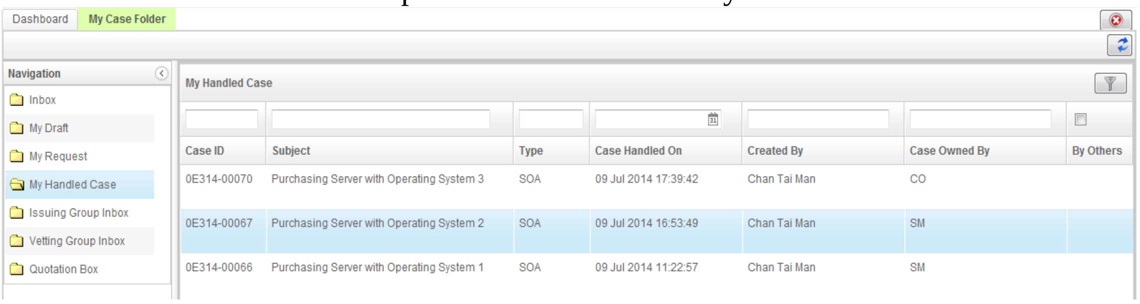
(Figure 8-14)

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

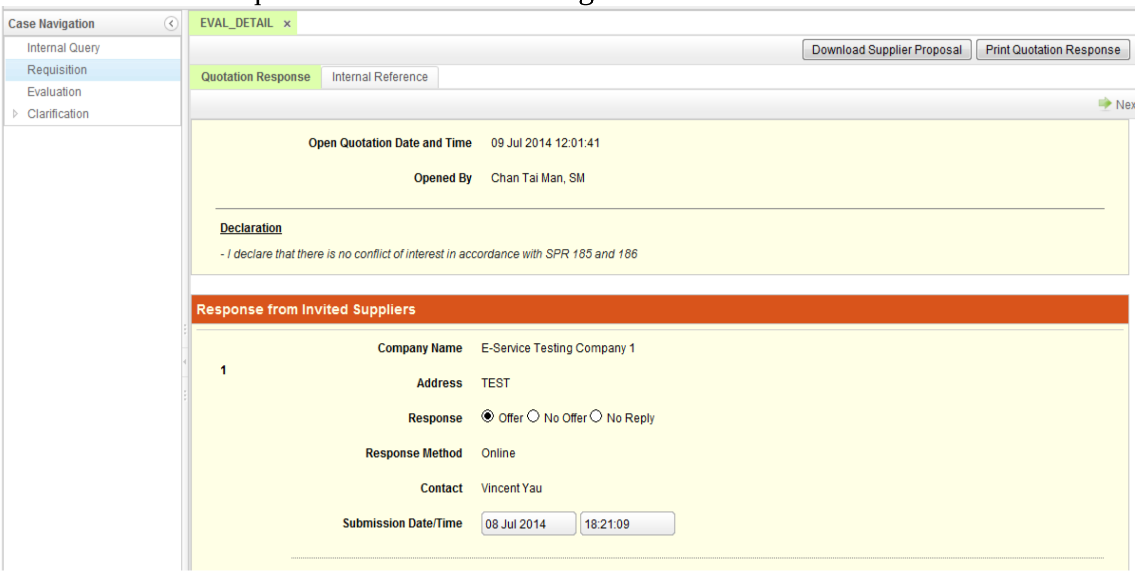
To facilitate user to create a new requisition making reference to the old one, Copy Requisition function is available. To perform the function, please follow the steps below:

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



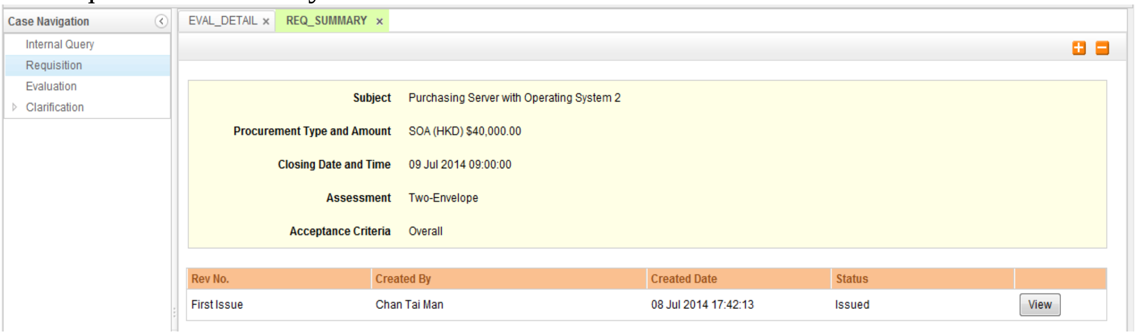
(Figure 8-15)

2. Double click Requisition in the Case Navigation



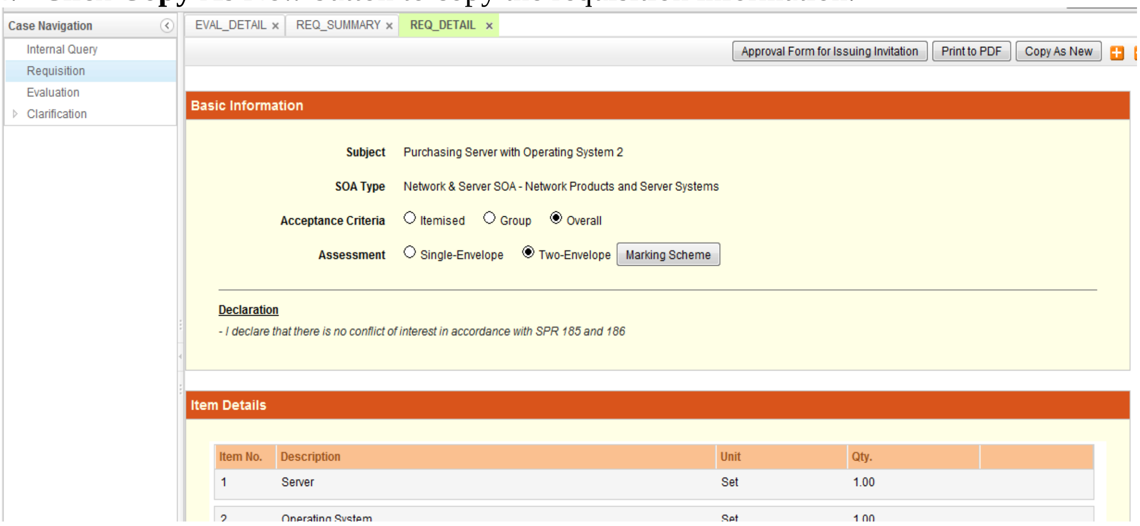
(Figure 8-16)

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



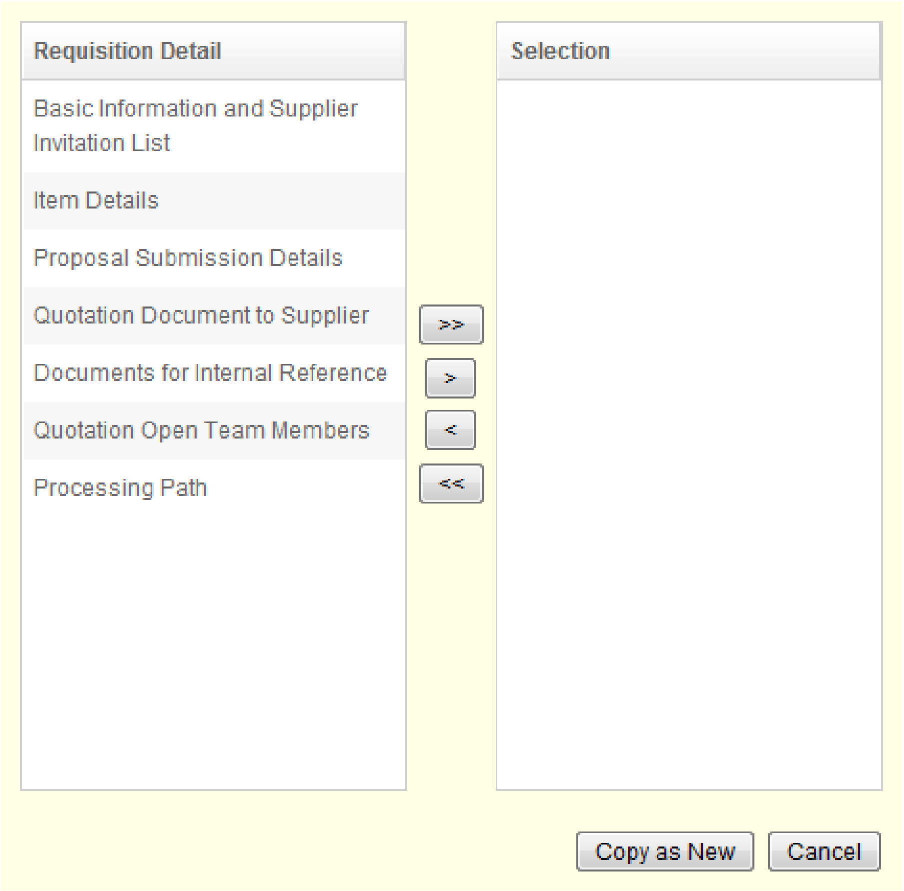
(Figure 8-17)

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



(Figure 8-18)

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



(Figure 8-19)

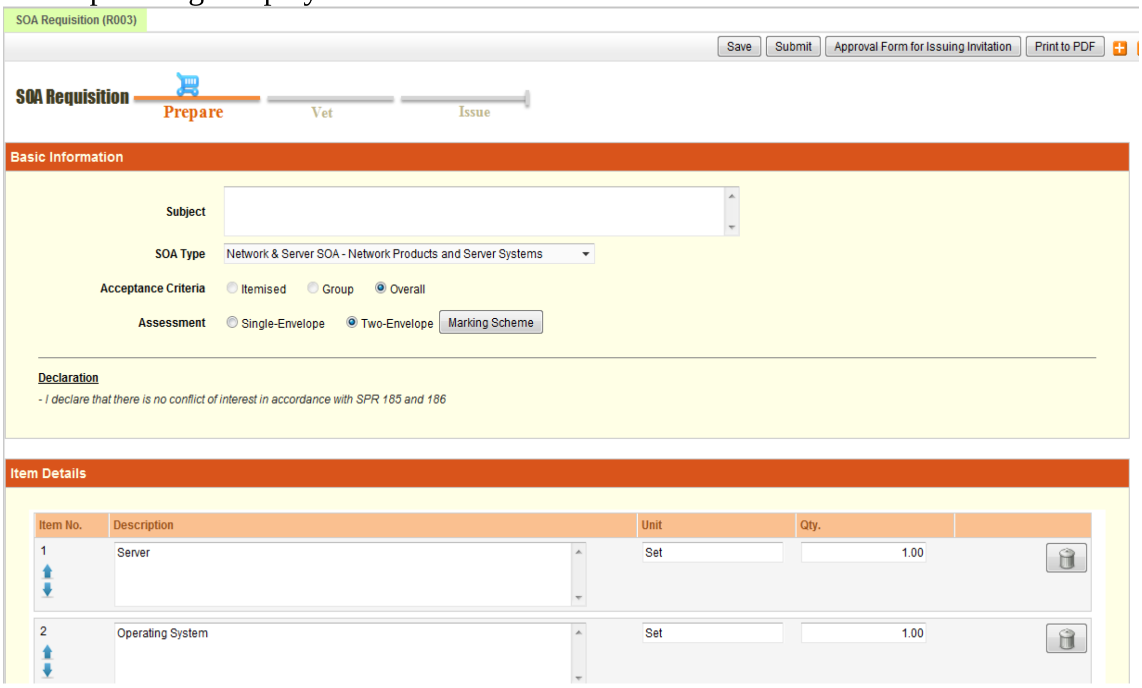
<u>Data Field Description</u>

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:



(Figure 8-20)