LABUAN SHIPYARD & ENGINEERING SDN BHD

Oracle Procurement Cloud

User Manual

Sourcing

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1 GETTING STARTED

This section provides start-up instructions for using the Oracle applications.

1.1 Sign-On to Cloud applications

To log into the application:

1. Open internet browser window.
2. Enter the below URL:

No.	URL Type	URL Link
1.	UAT	https://fa-etei-test-saasfaprod1.fa.ocs.oraclecloud.com/

Table 1: Direct Login URL

3. The Sign In page appears. Enter your **User ID** and **Password.**

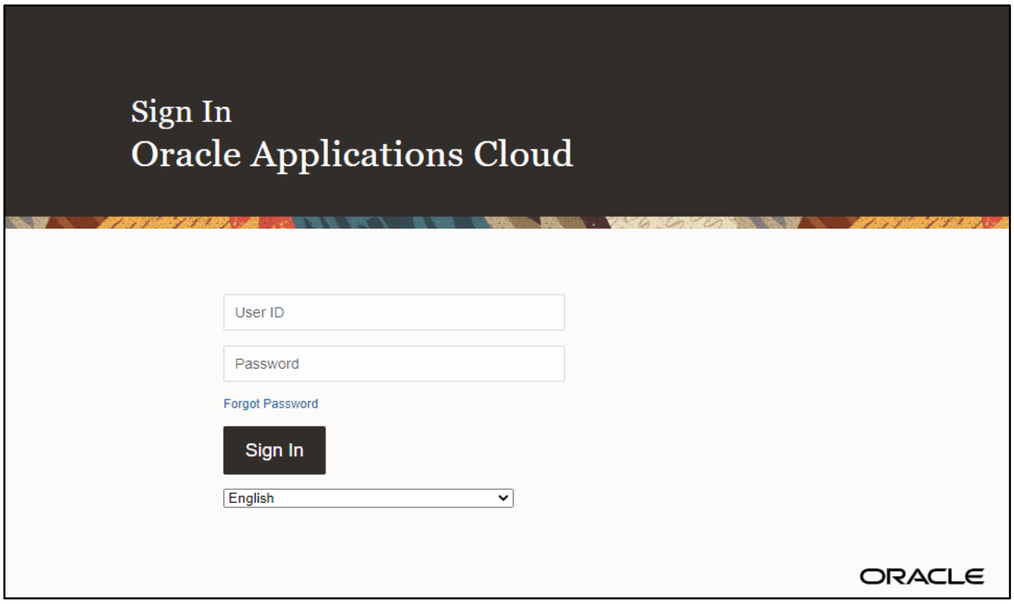


Figure 1: Oracle Cloud Sign-In Page

4. Your user ID and password are case sensitive. Passwords always appear as asterisks in the display as you enter them.
5. Tab to or click the  button to sign in.
6. Personal Homepage dashboard screen appears with CLOUD privilege access.

1.2 Navigating from Personal Home Page to Applications

After you log in to Oracle Applications, your Oracle Procurement Cloud Home page is displayed. All the functionality within the Oracle Cloud applications revolves around homepage which you can personalize. From here you can:

1.Get a quick glance at your work-related conversations and announcements.

2.Use the Application Link icons to navigate to pages and dashboards to perform your day-to-day activities.

3.Access the Navigator to access any additional applications that are not available in the application section on the home page

4. Favourited list of quick actions to quickly perform some key tasks.

Note: The exact appearance of your windows may vary depending on your personalization and roles that is assign to you.

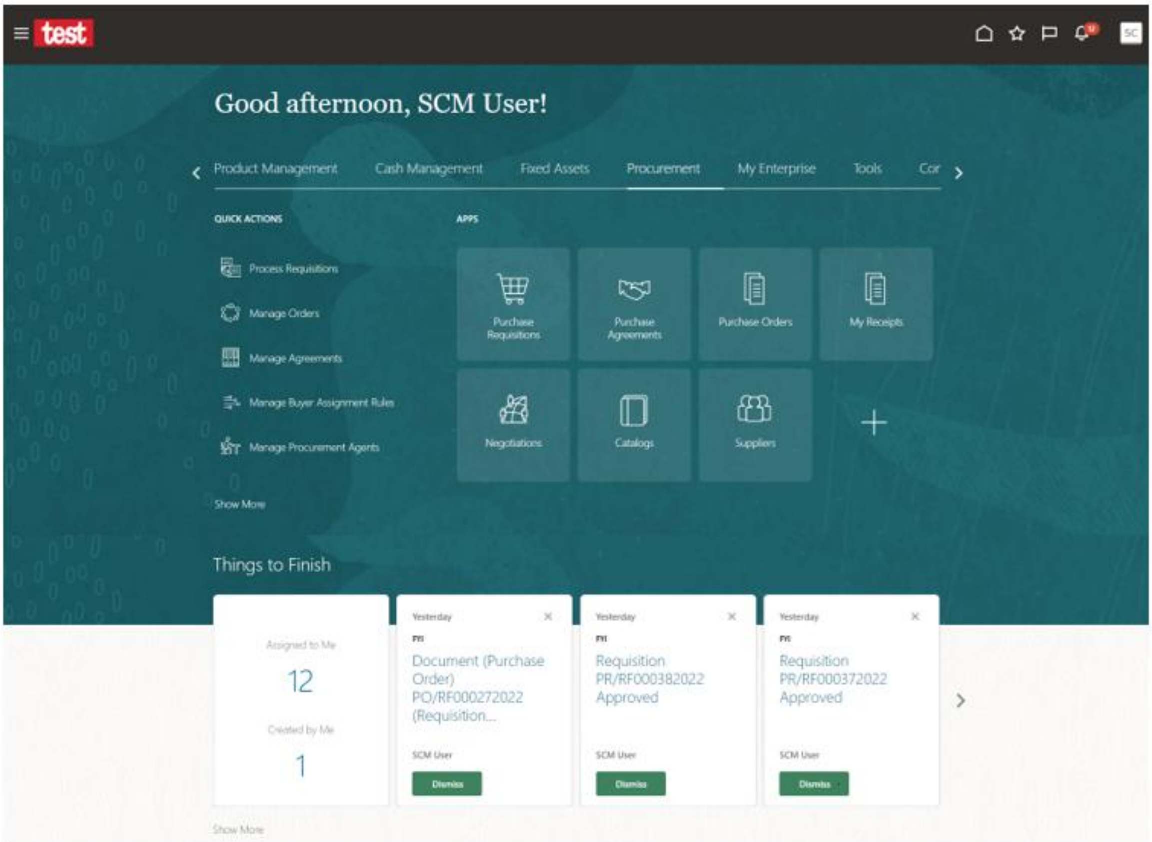


Figure 2: Personal Home Page

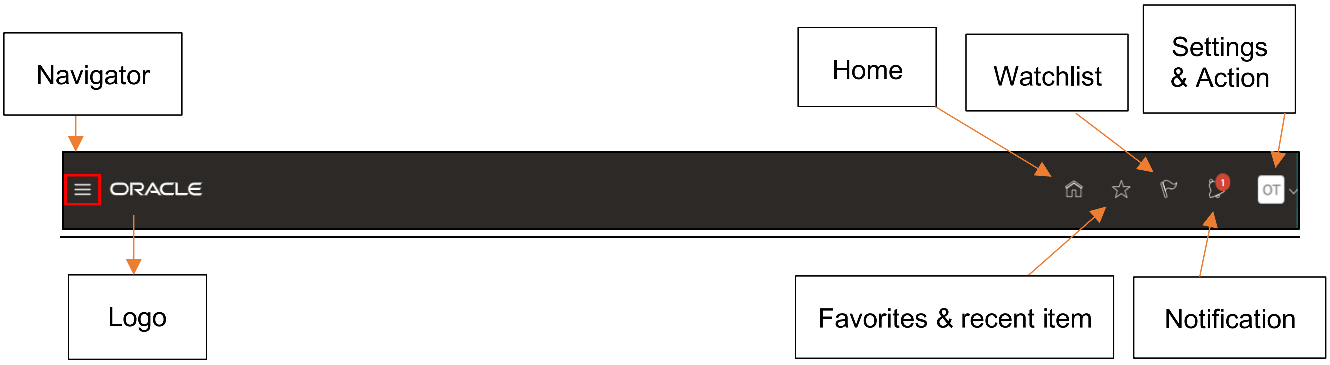


Figure 3: Navigation tools in the global area of the home page

Once you have set your homepage as the Newsfeed Home Page, then it will come with different sections.

1. **Apps Section.**

Figure 4: Apps section

Within the Apps section, you have various icons that can be used to start navigating into the different work areas of an application. For example, if you would like to navigate to the Invoices work area within Payables, you will select your application as Payables. And you will choose Invoices in the Apps section. When you select Invoices, the system takes you to the Invoices work area, where you can perform various activities, such as recording invoices, managing invoices, generating accounting for your invoices, etc. Once your work has been completed, you can go back to the home page by using the home icon.

You can also access the apps via the Navigator. 

Here, the access is granted to various work areas based on the roles that have been given to your user account. You have the flexibility to personalize the App section. You can decide what you want to show within these springboard icons and what you want to hide. If you are an order regular visitor to the Payment work area, you mostly work with Payable's dashboard invoices, you can hide the payments by clicking on this icon. So, it will not be shown in the apps icon but only accessible through the Navigator.

2. Things to Finish section.

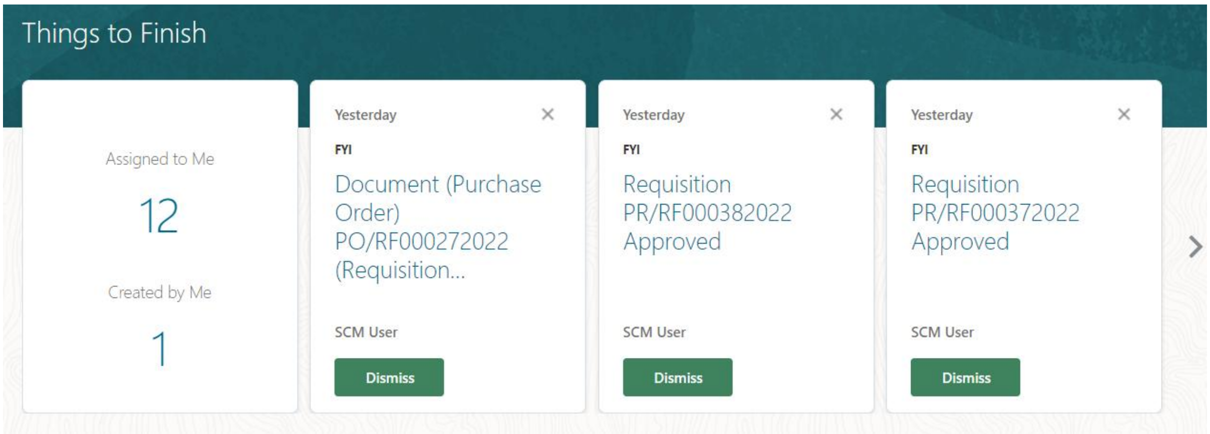


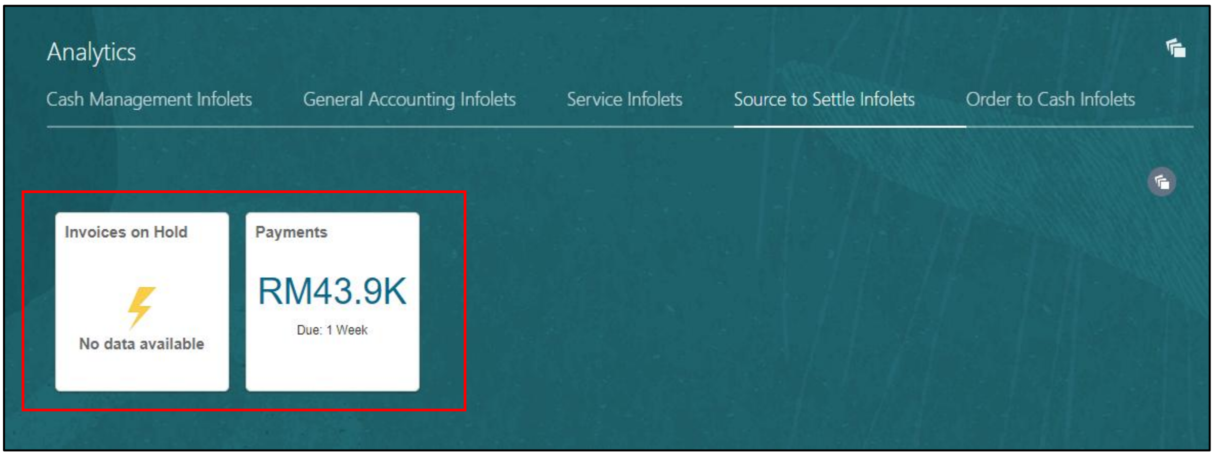
Figure 5: Things to Finish section

The Things to Finish section provides you with a count of any pending notifications that are assigned to you and may require an action from you. Account Link name created by me lists the approval requests that you have created. You can click the link to navigate to a full list of notifications pertaining to that account. Then the items listed in the Things to Finish section are same as the notifications that are listed in the global header.

The same information is available when you click on notifications icon. You can access the same number of notifications from here, as well as from the Things to Finish section. The list displays the latest notification first and allows you to scroll horizontally to view more notifications.

You can clear a notification from the list by clicking the Close icon. When you clear a notification, the count does not change, since no action is taken on that notification. If you click on you will get a listing of all the notifications that are either FYI or the notifications that require an action from you. When you click on the link it opens the notification and you can get the details of the notification. If you are satisfied, you can either approve it or you can either reject it. Once the notification is read then the count will change.

3. Analytics section



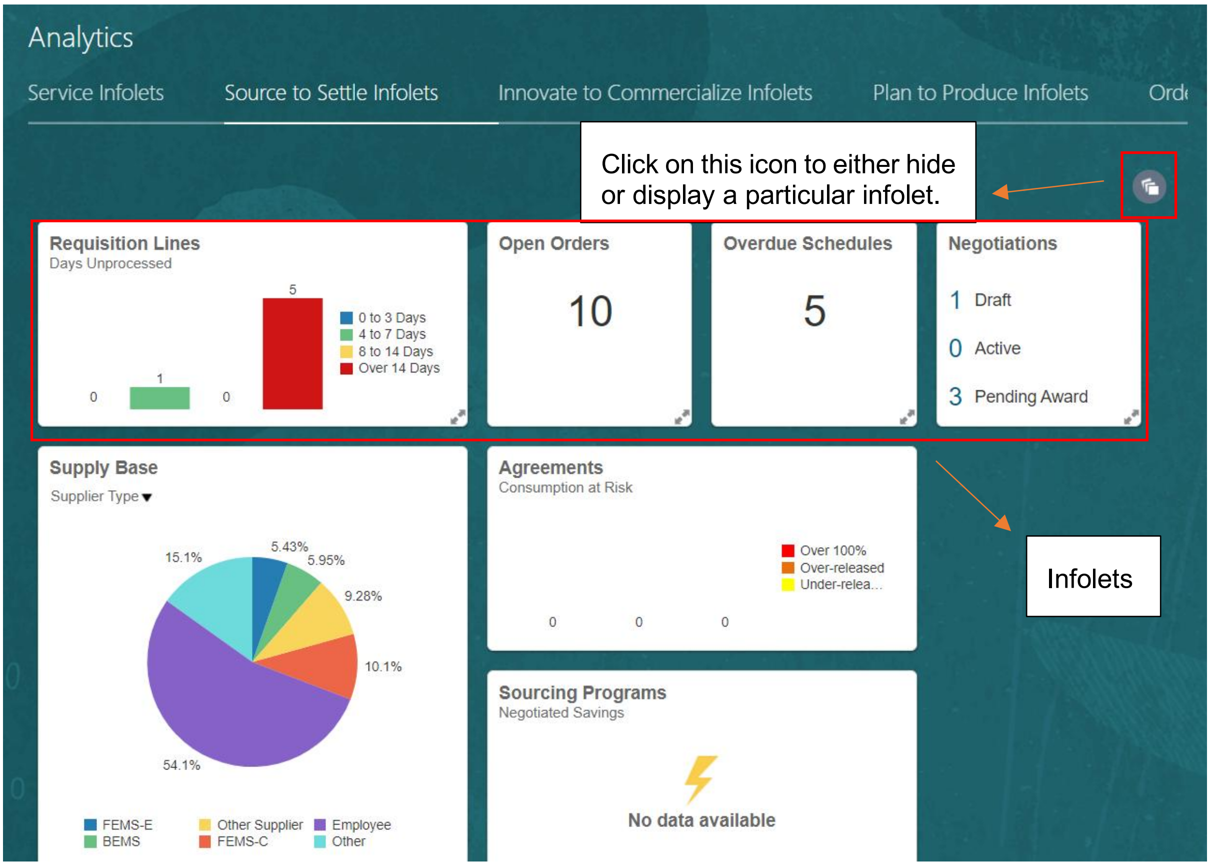


Figure 6: Analytics section

As far as procurement is concerned, there are currently few choices of analytics display. And they are source to settle infolet, service infolet, innovate to commercialize infolet, plan to produce and order to cash infolets. You can personalize the Analytics section and decide which infolet should be visible, which should not be visible.

1.3 Creating Favorites and Setting Preferences

Creating Favorites

Each user has their own favorites and adding favorites is easy in cloud: just go to your favorite work area or task page. Click on the favorite icon and click Add to Favorites. By this you get to your favorite pages directly and easily when you click the favorite icon. You can remove unwanted pages by clicking Manage Favorites.

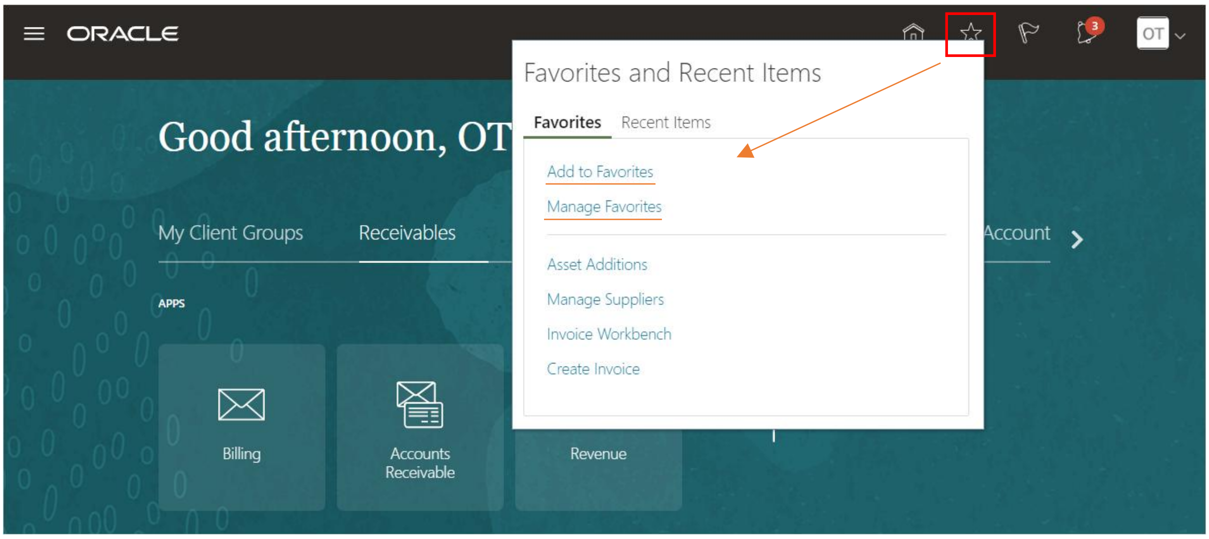


Figure 7: Creating and Managing Favorites

Set Preferences

Select Preferences to set personal options such as regional, language, accessibility setting, watchlist, etc as shown in the list in Figure 8. You can also reset your password from the Preferences page. To get into set preferences, click on setting and action dropdown menu click on Set Preferences.

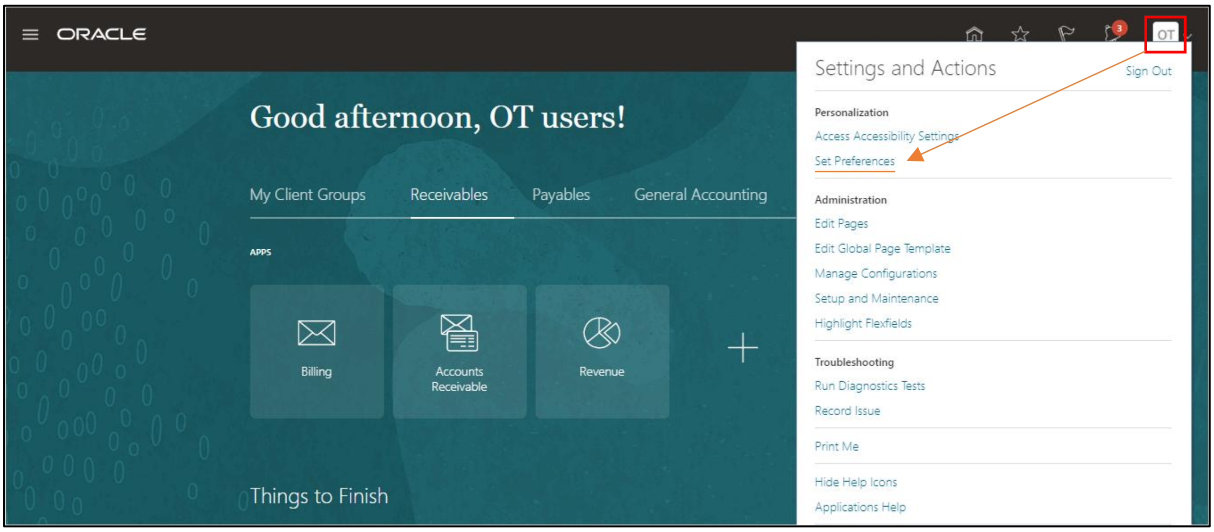


Figure 8: Setting Preferences

1.4 Overview of Using Work Areas to Streamline Business Processes

Use work areas to gain instant insight into your business and identify potential problems with processing transactions.

Work areas can include the following:

- Infotiles
- Content area
- Action toolbar
- Tasks panel tab
- Process Warnings and Errors
- Bank Statement Reconciliation
- Process Monitor

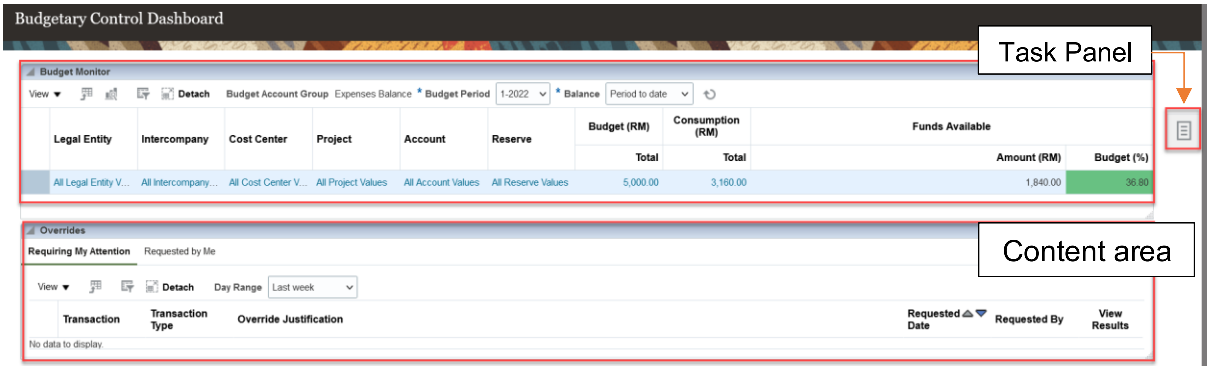


Figure 9: Budgetary Control Work Area

Infotiles

Summarize a high volume of transactional information. You can quickly identify potential problems and prioritize your daily activities by scanning the infotiles and accessing transaction details.

For example, select an infotile to display corresponding transactional information in the content area. You can also click links in the infotile to filter the records in greater detail in the content area.

Content Area

The content area displays transactional information related to the infotile you select. You can review the detailed information and take the necessary action.

For example, click the item link in the table to drill down to transaction-level information. You can perform multiple actions on the transaction, such as editing, approving, or rejecting the transaction, and posting the transaction to the ledger.

Actions Toolbar

Use the actions toolbar to perform a range of activities on one or more rows you select in the content area.

For example, select a transaction row and use the View menu to view the transaction in more detail. You can export the data to an Excel worksheet, detach the pane, approve, or reject one or more transactions, as well as apply additional filters.

Tasks Panel Tab

The Tasks panel includes tasks that are related to the work area and that you have access to perform.

For example, create an invoice, review journal entries, create mass additions, and manage accounting periods within a task panel.

Process Warnings and Errors

The process warnings and errors keep previous processes history that has been run for bank statement loader. This area contains purge function which is available to delete error files.

For example, select on the file then click on ✖ button to purge and completely terminate the files.

Bank Statement Reconciliation

The bank statement reconciliation will provide an information of bank statement and its status on reconciliation. There will be two tabs which are Incomplete and Complete.

For example, Incomplete tab listed all bank statement that consists of statement lines which have not yet to reconcile while Complete tab listed bank statement which have been completed reconciled.

Process Monitor

The Process Monitor is to monitor schedule process.

For example, instead of navigating to Scheduled Processes Task, you may use the refresh button to keep update on the process item. It will provide you the same info as in Scheduled Processes Page.

1.5 Scheduled process

Scheduled processes do tasks that are too complex or time-consuming to do manually, for example importing data or updating many records. You can run scheduled processes on a recurring schedule and send notifications based on how the process ends. Some scheduled processes give you printable output. Those processes might have Report in their name.

Jobs

Each scheduled process that you run is based on a job. The job is the executable that controls what the process can do and what parameters and other options you have for the process. A job set contains multiple jobs.

Job definitions can be set on Oracle Business Intelligence Publisher reports so that people can run the reports as scheduled processes.

Process Sets

A process set is a scheduled process that is based on a job set. So, when you submit a process set, you are running more than one job.

Note: When you submit certain scheduled processes, the job logic causes other processes to automatically run. But in this case, you are not submitting a process set that includes those other processes.

Submission

When you submit a scheduled process, you can use its parameters to control which records are processed and how. Some scheduled processes do not have parameters.

As part of the submission, you can also set up a schedule for the process, for example to run once a week for two months. Every time a process runs, there is a unique process ID.

Output

Some scheduled processes provide output in PDF, HTML, and other formats. For example, a process can import records and produce output with details about those records. There are many types of output, for example a tax document or a list of transactions.

Process Sets

A process set is a type of scheduled process that is based on a job set and contains at least two processes. So, you can run many processes in one go, for a specific purpose. These processes run in a certain order, in serial or parallel, or by some other logic.

Process sets can have any number of individual scheduled processes and even other process sets.

To Submit Scheduled Processes

Click **Navigator** > **Tools** > **Scheduled Processes.**

1. On the **Scheduled Processes Overview** page, click **Schedule New Process.**
2. Leave the type as **Job**, enter the process that you want to submit, and click **OK**.
3. In the **Process Details dialog box**, enter at least the required parameters, if any.

   Some processes have no parameters at all. Some parameters depend on other parameters. For example, date range parameters might appear only after you select By Date for another parameter.

4. Click the **Advanced button** if you want to define the schedule, notifications, or output. Continue to the next steps. Or just skip to the steps for
5. Click **Submit**, to run the process once as soon as possible with the default output.

Define the Schedule

Set up a schedule to run the process on a recurring basis or at a specific time. Use the Process Details dialog box in Advanced mode.

1. Open the Schedule tab and select Using a schedule for the Run option.
2. Select a frequency.
3. Select **User-Defined** if you want to enter the exact dates and times to run the process.
4. You can select Use a Saved Schedule to use an existing schedule if there are any.
5. Depending on the frequency, define when the process should run.

Define the Output

You can choose the layout, format, and destination for your output. Use the Process Details dialog box in Advanced mode.

1. Open the Output tab, if available.
2. Click **Add Output Document.**
3. Change the name if you want. The name identifies this output document when you go to view output later.
4. Select a layout if you have more than one to choose from.
5. Select a format, for example one of these:

   PDF: Is the best option if you want to print the output.

Excel: Supports embedded images, such as charts and logos, but can be opened only in Excel 2003 or higher.
Data: Gives you report data in an XML file, which is used mainly for editing the report layout.

6. Click **Add Destination** to send the output somewhere, for example to a printer or email address. You can add many destinations and send the output to all of them at the same time.

   Tip: You can also print the output as part of the steps for finishing the submission, instead of adding a printer destination here.

   To add more output documents, repeat steps 2 to 6.

Set Up Notifications

You can have notifications sent out depending on how the process ends. Use the Process Details dialog box in Advanced mode to set that up.

1. Open the **Notification** tab.
2. Click **Create Notification**.
3. In the Recipient field, enter the **user ID** of the person you want to send the notification to.
4. In the Condition list, select when to send the notification, for example when the process ends in error.
5. Click **OK.**

To send notifications to more people, repeat steps 2 to 5.

Finish the Submission

Follow these steps in the Process Details dialog box:

1. Click the **Process Options** button if you want to define settings that affect the data to be processed.
2. If the process gives you output and you want to print it, select the **Print output** check box and a printer.
3. Select the **Notify me when this process ends** check box if you want to get an email notification.
4. Enter submission notes to capture any information you want to associate with this submission. You can use your notes to find this submission later.
5. Click **Submit**.

6. Click **OK** to confirm.

Tip: Note down the process ID for your submission so you can easily find it later. For example, let's say you set the process to run once a week. If you later want to cancel all runs on this schedule, you need to cancel this original submission with this process ID.

To Submit Process Sets

To submit a process set from the Scheduled Processes Overview page:

1. Proceed with the steps that you would follow to submit any scheduled process, but select Job Set for the Type option.
2. In the Process details dialog box, set parameters for individual processes in the set. A process set itself does not have parameters.
   a. Select a process on the Processes tab.
   b. Enter parameters for that process, if any.
   c. Repeat for other processes in the set.
3. Define the schedule, output, and notifications for the process set, as you would do for any scheduled process.
4. Set any other options and click **Submit.**

To Check Status

1. Click **Navigator** > **Tools** > **Scheduled Processes**.

   The Search Results table shows processes that match the default saved search, **Last 24 hours**.
   - The table might be blank if nothing was submitted.
   - If submission notes were entered when submitting the process, you can use the **Submission Notes** column to help identify the process.

2. If you don't see the process, click the **Refresh** icon or use the Search section.
3. Do any of these tasks to check on the progress of the process:
   - For more details about the status, click the status link. For example, if a process is in the Ready status, you can click the **Ready** link in the **Status** column to see where the process is in the submission queue.
   - Check the **Start Time** column to see if the process has started running yet.
   - In the Search Results table, find the **This Job's Items Processed / Errors / Total** column. For some scheduled processes, this column shows what's getting processed and how things are going.
   - Click the **View Log** button, especially if your process has a blank **This Job's Items Processed / Errors / Total** column. The type of information in the log varies,

depending on the process. You can open the log from here only for if the process is currently running. When the process is done, you might want to also take a look at the final log, if any, from the Details section.

To view output from scheduled process

1. Click **Navigator** > **Tools** > **Scheduled Process**.
2. Find your scheduled process and, if you need to, refresh the search results to see the latest status.
3. Select the scheduled process.
4. Go to the Output subsection in the Details section.
5. Click the link in the **Output Name** column to view or download the output, which you can then print.
6. To view or export the output in a different format:
    a. Click the **Republish** button.
    b. Click the **Actions** icon.
    c. Select **Export**, and then select a format.

2 CREATE RFQ

Procurement team is responsible for creating a RFQ in oracle. RFQ is a document that an organization submits to one or more potential suppliers eliciting quotations for a product or service.

RFQs can be blind (buyer can see the quotes during the RFQ, but suppliers can't) or sealed (neither buyer nor suppliers can see the quotes until the RFQ is closed)

Two Stage RFQ

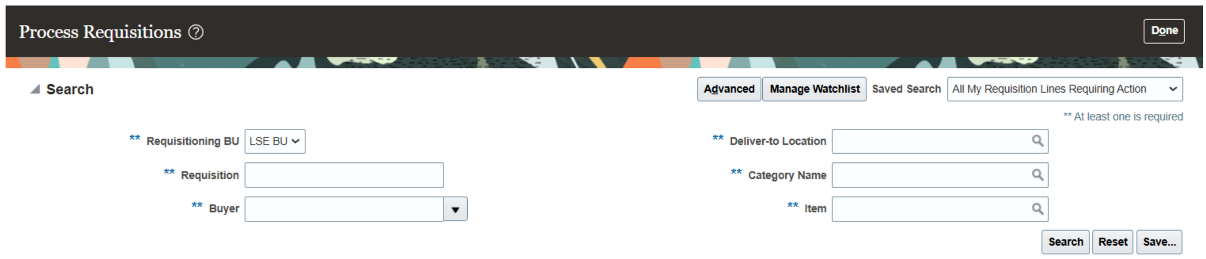
The two-stage RFQ process involves the submission by the suppliers of a technical quote and a commercial quote. The technical quotes are opened and evaluated first to determine a list of qualified suppliers, and only then are the commercial quotes of the qualified suppliers opened and evaluated.

No.	Work Area	Navigation
1.	Procurement	Purchase Orders

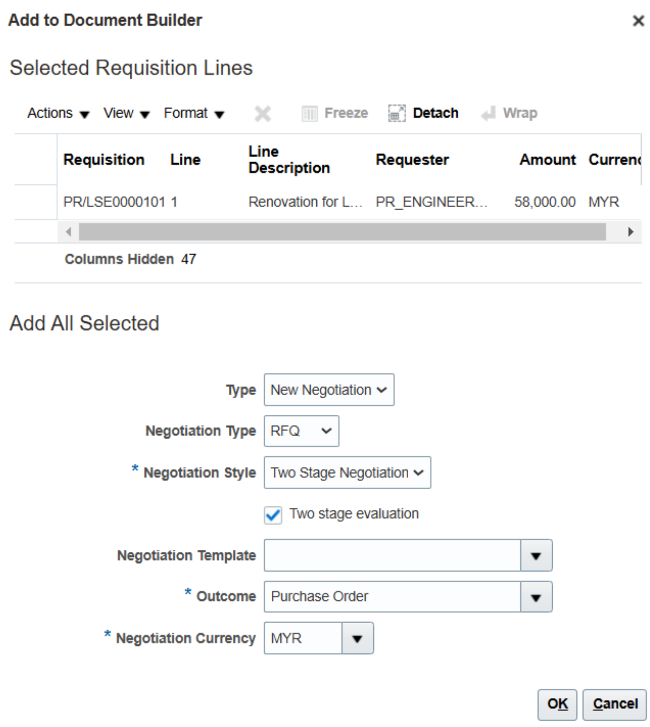
Table 2: Navigation

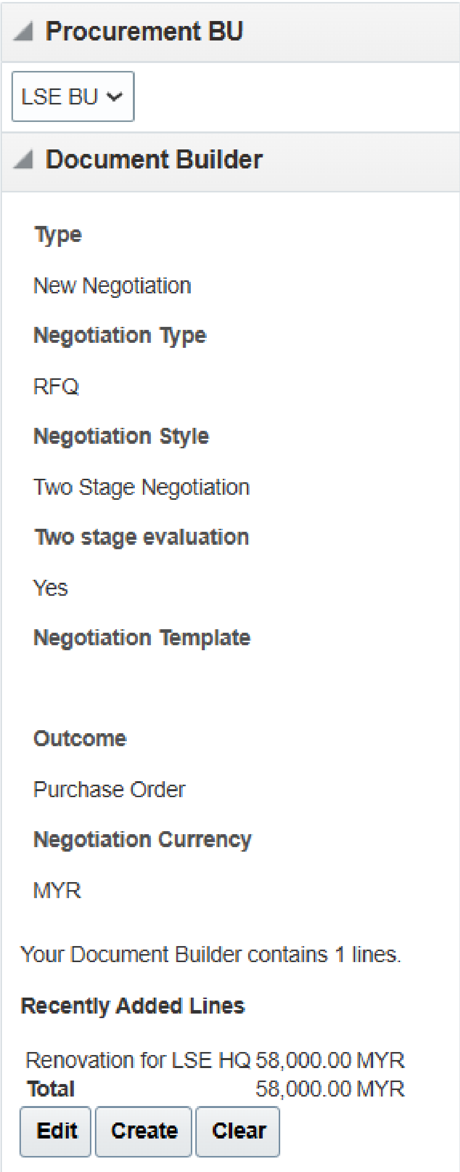
2.1 Create RFQ

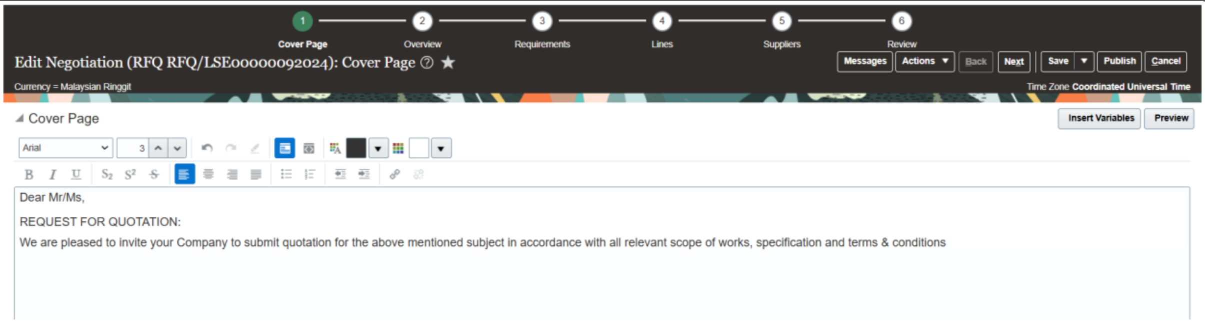
No.	Steps
1.	Click on Task 
2.	Choose Process Requisition *purchase by category. If PR contain mixed category items, Buyer need to segregate ikut category in one RFQ. 

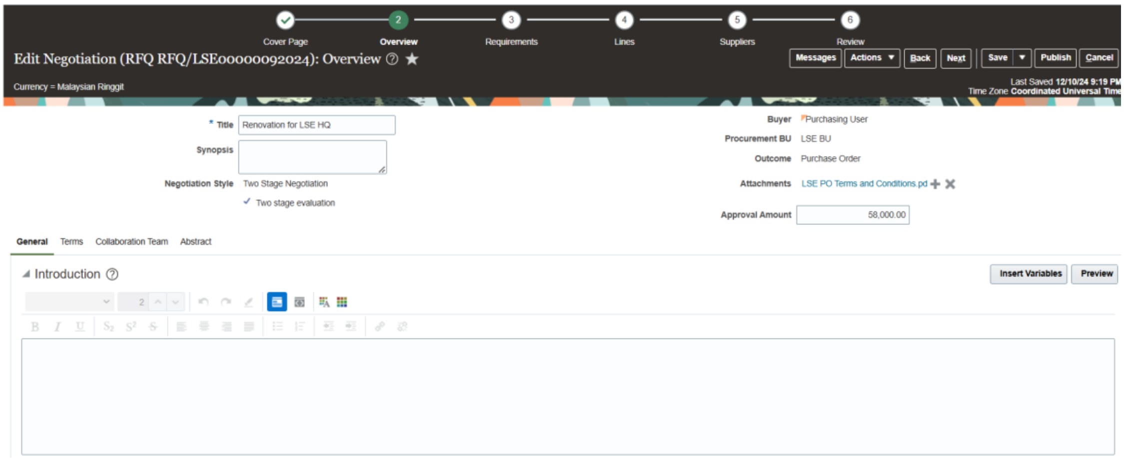
<table>
<tr><td></td><td colspan="2"></td></tr>
<tr><td>3.</td><td colspan="2">Enter the parameter and click Search button.


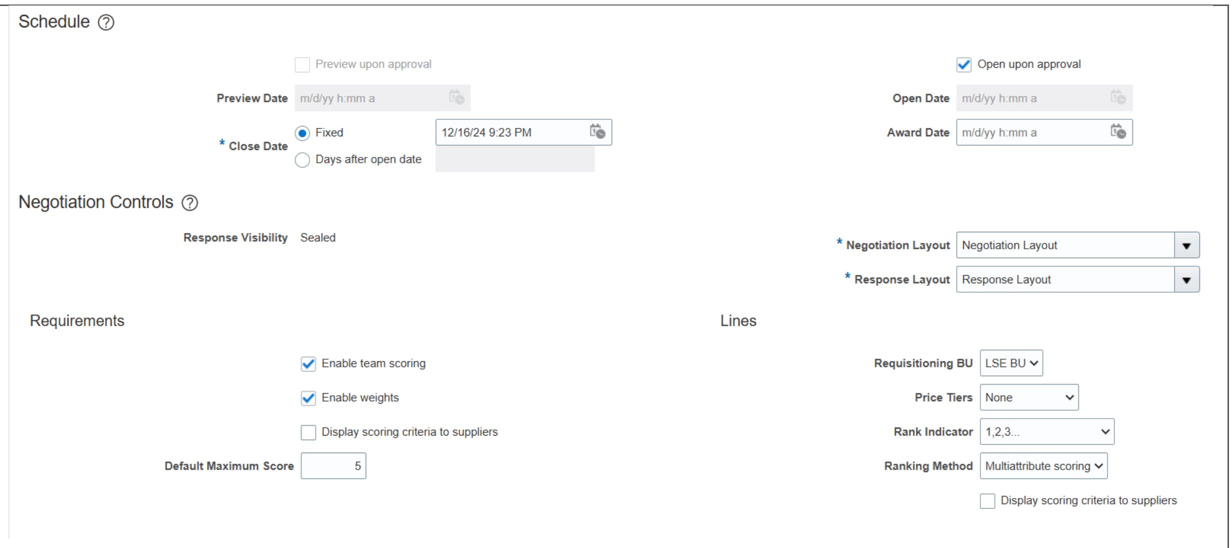
Click Add to Document Builder

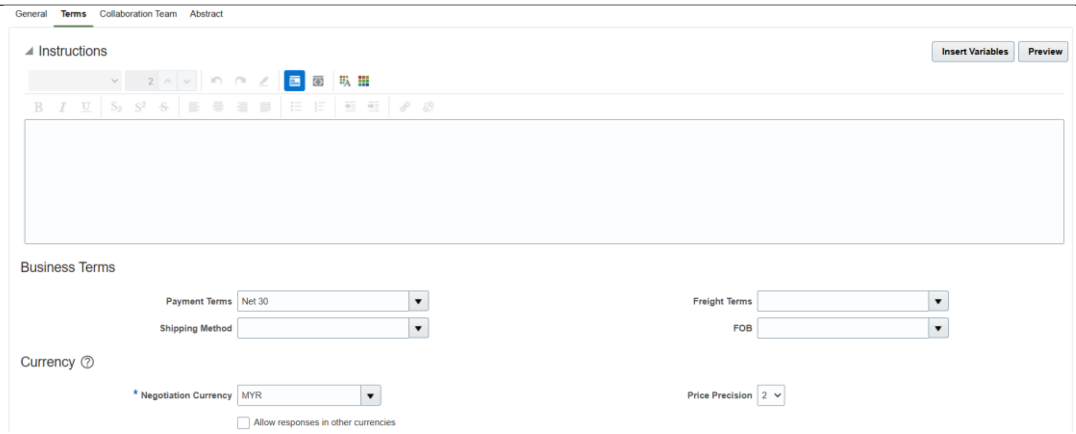
</td></tr>
<tr><td>4.</td><td colspan="2">
</td></tr>
<tr><td>5.</td><td>Type</td><td>Enter Type : RFQ</td></tr>
<tr><td>6.</td><td>Negotiation Type</td><td>Enter Negotitation Type : Two Stage Negotiation/Standard Negotiation</td></tr>
</table>

7.	**Negotiatation Template**	Enter negotiation template if Prourement Team already define predefine template.
8.	**Outcome**	Enter Outcome
9.	Click **OK** button	
10.	Review the detail of the information. Click **Create** Button  	
11.	Enter Cover Page Information	

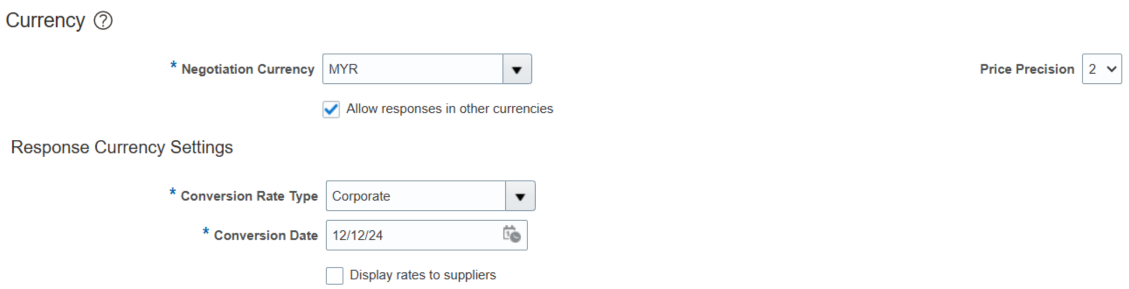
<table>
<tr><td></td><td>
</td></tr>
<tr><td>12.</td><td>Click Next.
Enter Overview Information

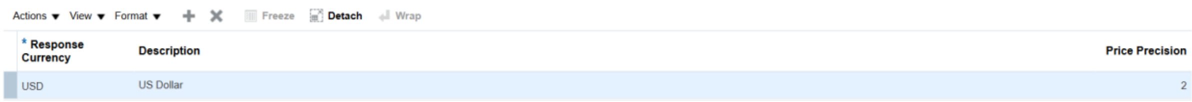
Go to General Tab
Add attchment if required

</td></tr>
<tr><td>13.</td><td>Define the Schedule
Define Negotiation Controls
Define Requirements</td></tr>
</table>

	
14.	<u>**Negotiation Dates**</u> **Preview Date** - During the preview period, all eligible suppliers may view the RFQ but not submit responses. **Open Date** - The date and time the negotiation opens. **Close Date** - The date and time the negotiation closes. Once closed, no further responses may be accepted. **Award Date** - The date and time by which RFQ/auction will be awarded. While buyers are encouraged to honor their award dates, the system does not enforce these dates. <u>Response Visibility</u> **Blind** - Only the buyer can see the quotes/bids. **Sealed** - The buyer can see the responses when the negotiation is unlocked. Both the buyer and suppliers can see the responses when they are unsealed.
15.	When calculating scores for supplier responses, there are three possible methods: **Automatic scoring** - The scores for responses are calculated by the application. When defining the negotiation. **Manual scoring** - When defining the negotiation, you don't define any score values. With this method, you (and any scoring team members) view the supplier response and enter scores yourself. **None** - if the scoring method is None, no scores are calculated by the application or assigned by anyone.
16.	Go to Terms



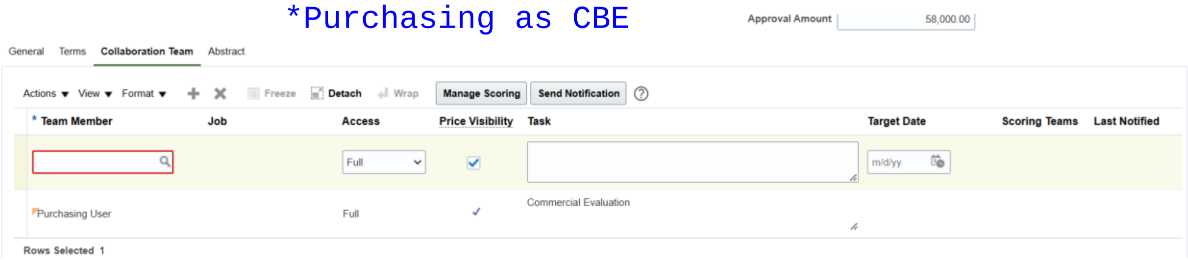
If the negotiation required response from overseas supplier, buyer need to tick allow responses in other currencies and define response currency.

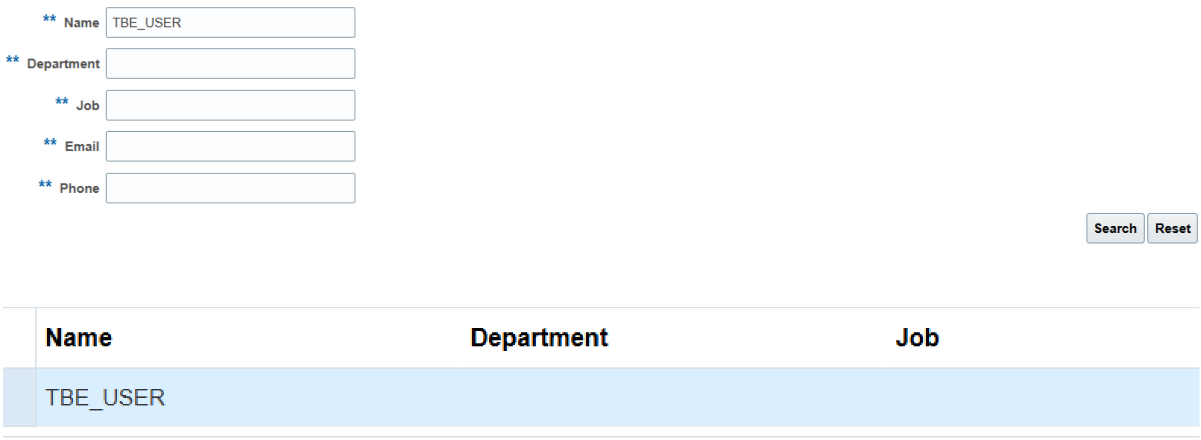
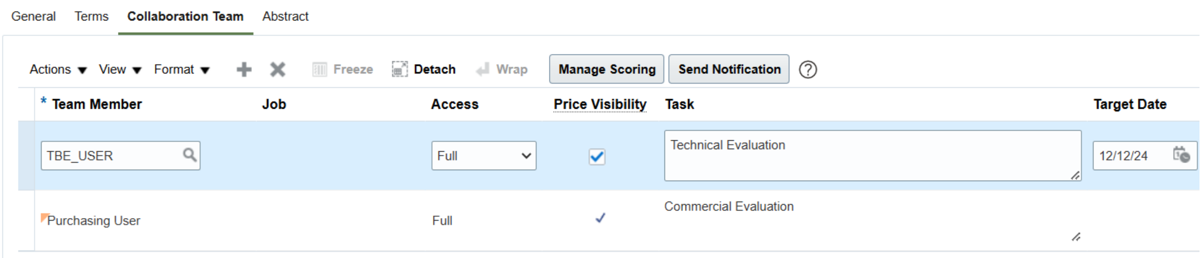
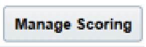
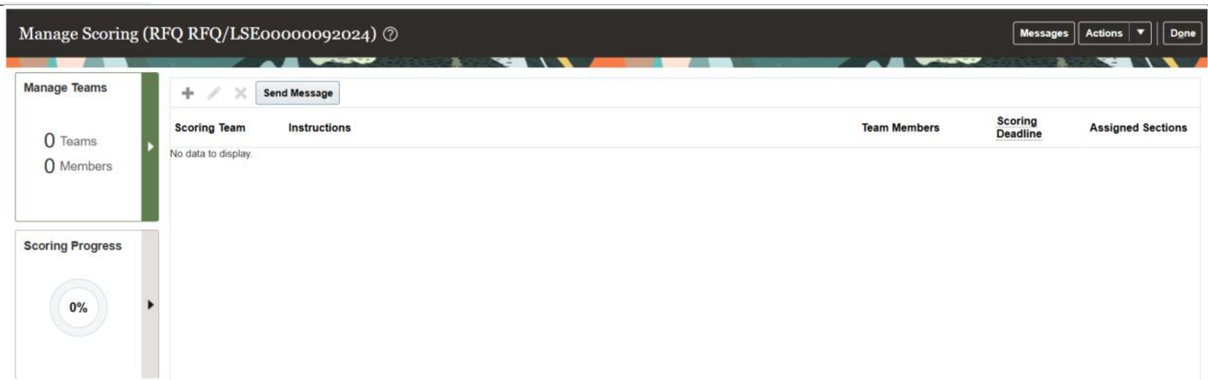
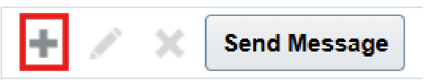


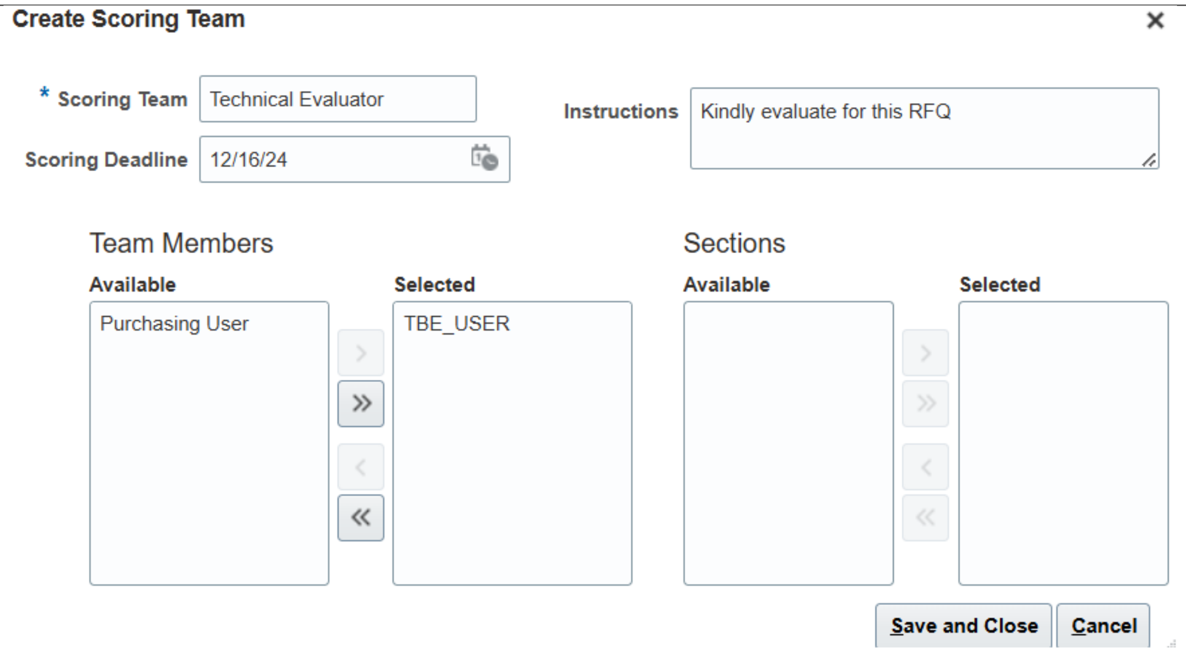


17. Go to **Collaboration Team.**

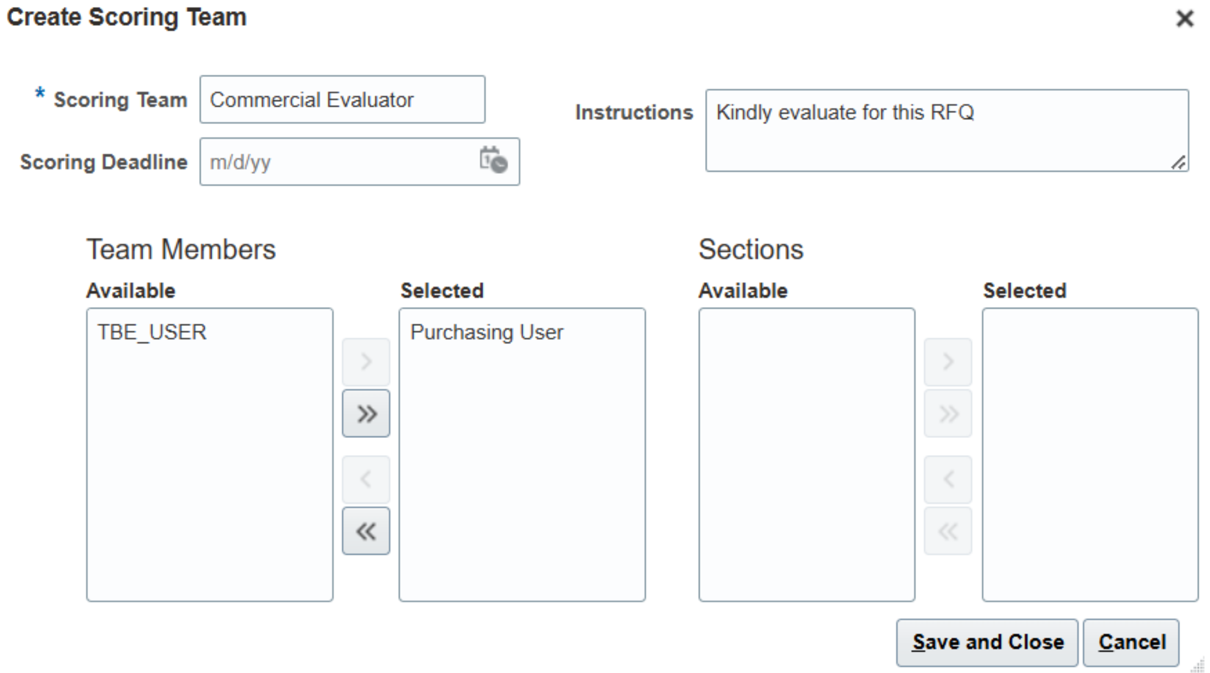
Enter Team member *TBE_User for Technical
*Purchasing as CBE



	 Set Access Enter Task Choose the target date 
18.	Click **Manage Scoring** 
19.	
20.	 Click + Icon Enter Information for Scoring Team

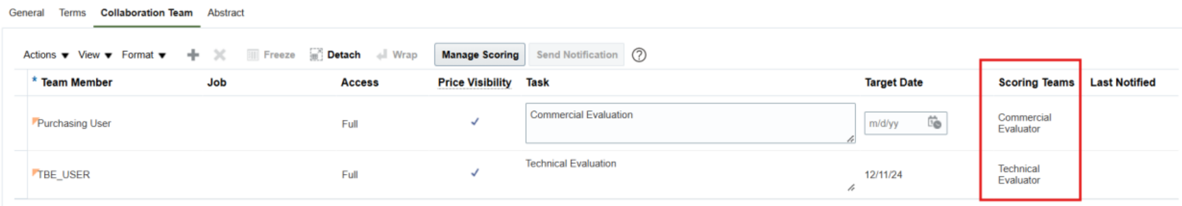


User can set scoring deadline for the technical and commercial scoring team



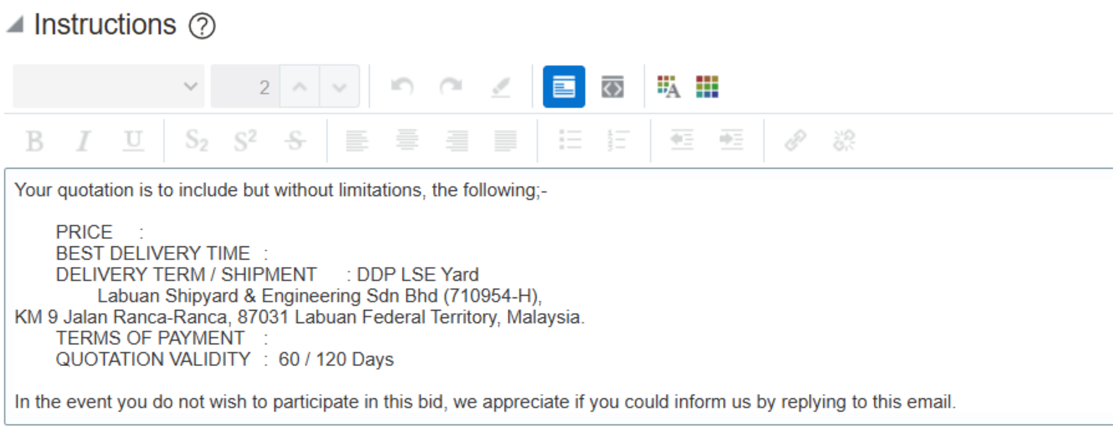
21.	Verify the information **Save and Close**
22.	Click **Done**

23.

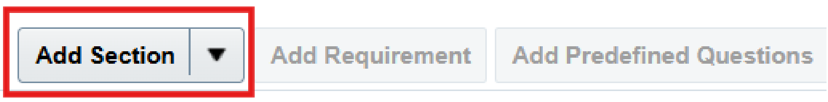


24. Click **Next** Button

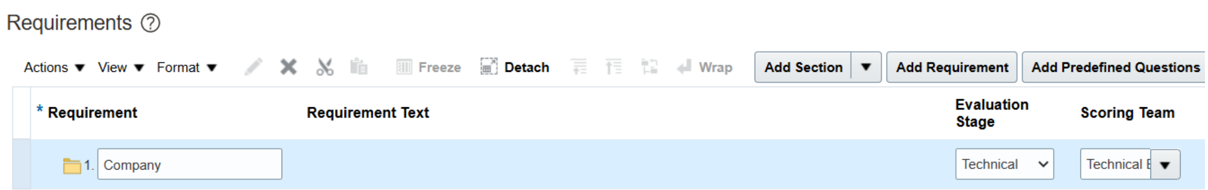
25. Enter Technical and Commercial Requirements Detail



26. Click **Add Section**

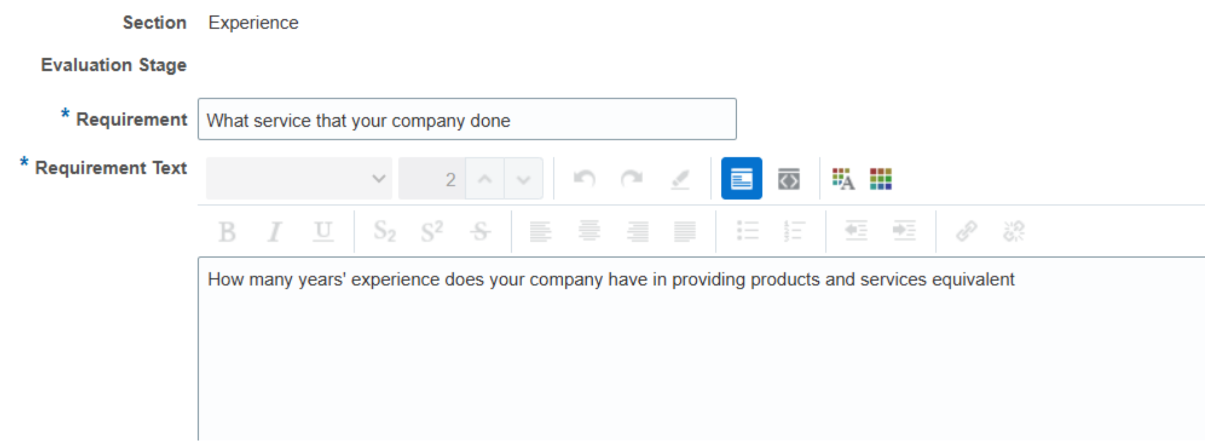


27. Enter **Section** Information



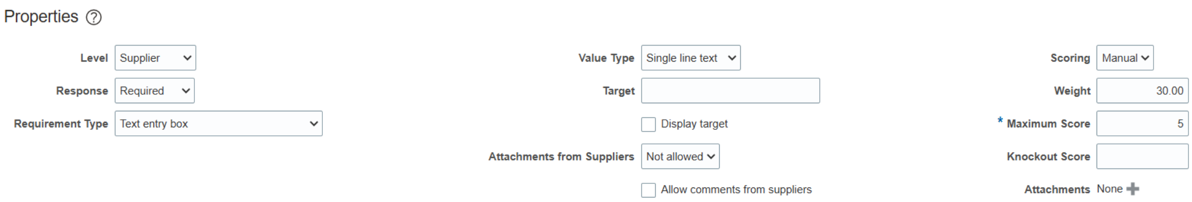
28. Click Add Requirement

29. Enter Requirement Information

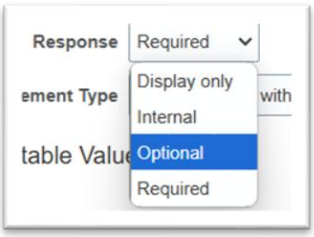


Define the Scoring Method, Weight and Maximum Score.

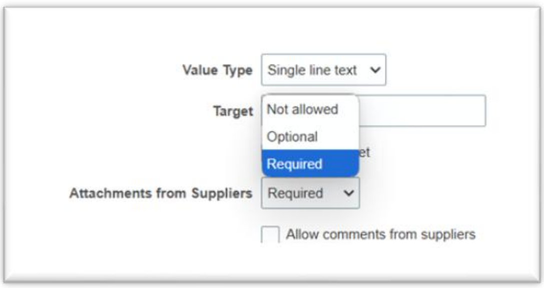
Requirement scores can also be weighted to more accurately reflect their importance within the negotiation.

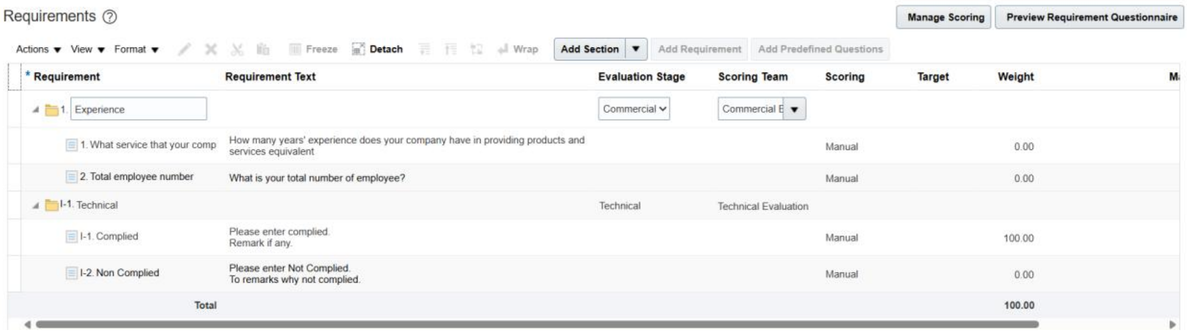


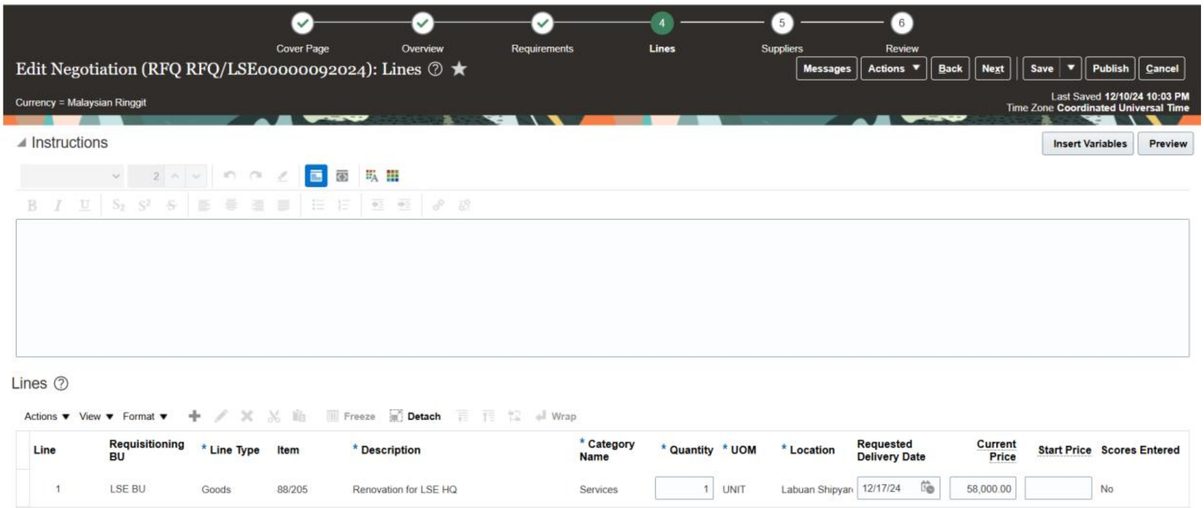
User can set the response options during supplier response.

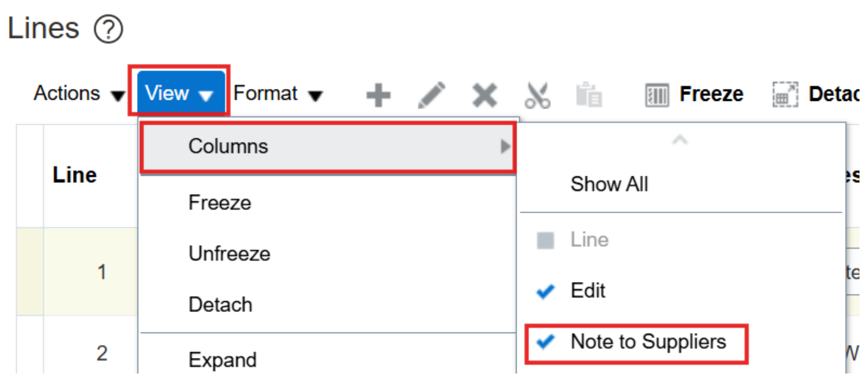


Attachment options can be set for specific requirements.

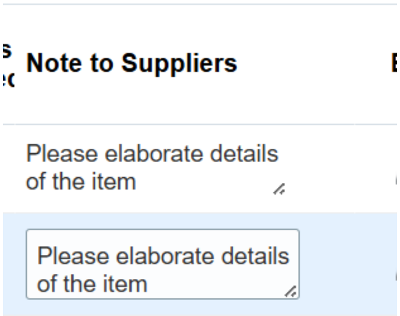
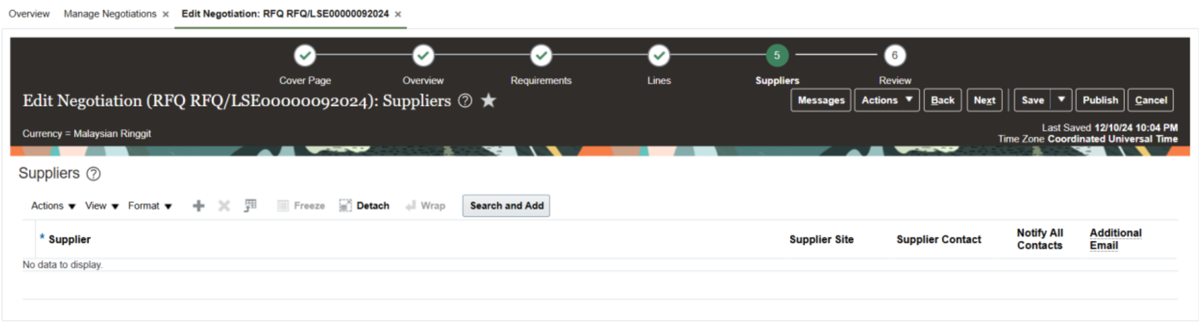
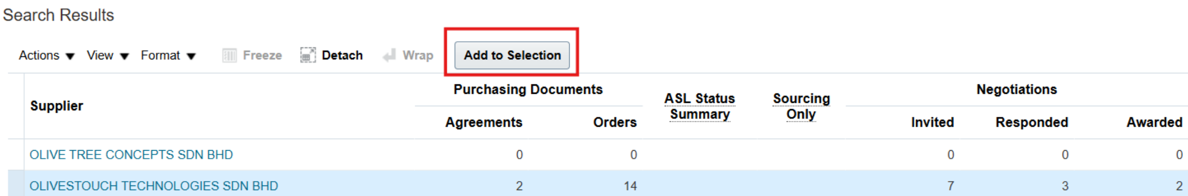
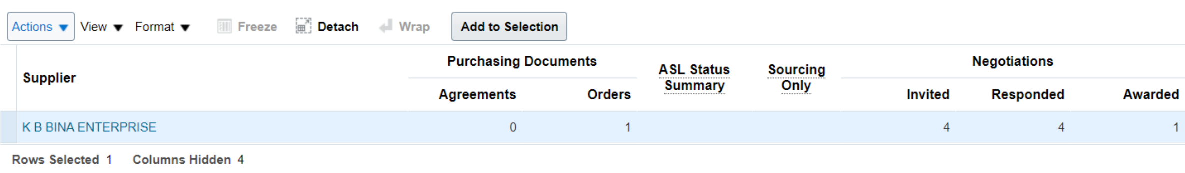


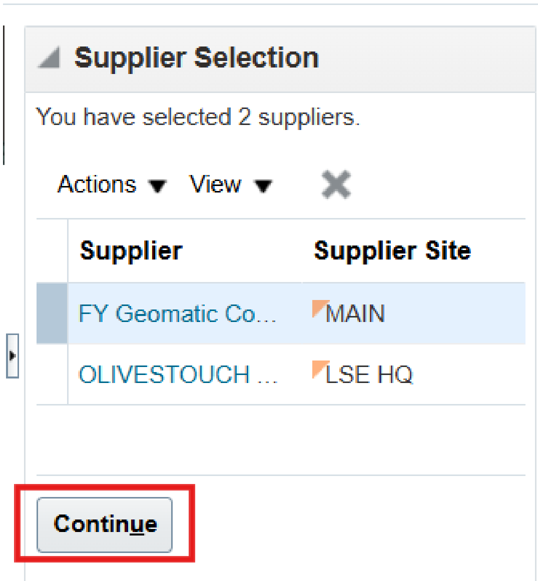
<table>
<tr><td>30.</td><td>Review the requirements entered.

</td></tr>
<tr><td>31.</td><td>Add Section and Requirement if you have additional information

Click Save and Close</td></tr>
<tr><td>32.</td><td>Click Next Button</td></tr>
<tr><td>33.</td><td>Go to Lines Information
The information created is from Purchase Requisition.




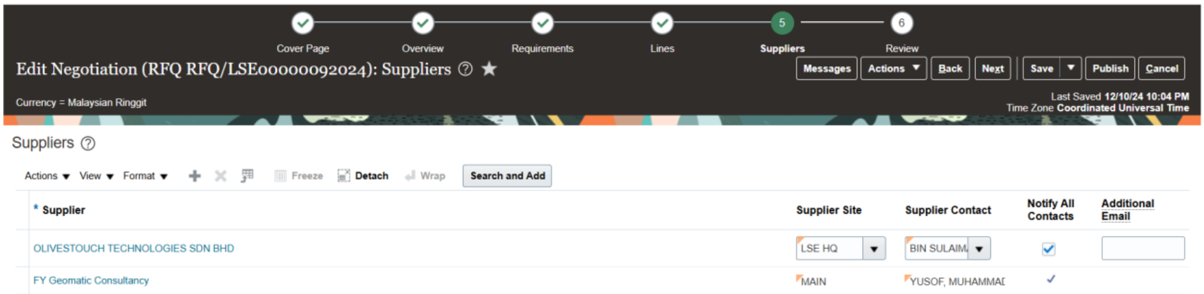
Note to Suppliers : This is to highlight any information to supplier for example to elaborate the details of the item.</td></tr>
</table>

<table>
<tr><td></td><td>
</td></tr>
<tr><td>34.</td><td>Click Next</td></tr>
<tr><td>35.</td><td>Click Search and Add

</td></tr>
<tr><td>36.</td><td>Enter Supplier Parameter and Search</td></tr>
<tr><td>37.</td><td>Choose Supplier Name and Click Add to Selection

</td></tr>
<tr><td>38.</td><td>Choose another supplier for this Negotiation

</td></tr>
<tr><td>39.</td><td>Click Continue</td></tr>
</table>

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


</td></tr>
<tr><td>40.</td><td>
The information will be defaulted from supplier setup.

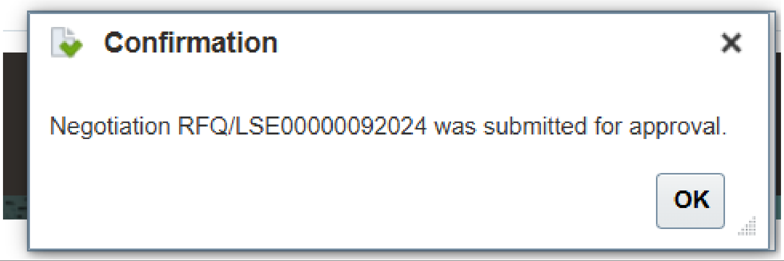
If the supplier have more than 1 supplier site, then user need to choose the Supplier Site.



</td></tr>
<tr><td>41.</td><td>
Click Next

User can Save or directly publish the RFQ.
</td></tr>
<tr><td>42.</td><td>
Review the Negotiation

Click Publish



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

Table 3: RFQ Creation

Negotiation/RFQ Status	Explanation
Draft	The initial status of the negotiation. Also the status of the negotiation after it's rejected. In this case, the category manager can edit and resubmit the negotiation document.
Approval in process	The negotiation document is in the process of being approved.
Submitted	The negotiation document has been approved, but the preview or open date is in the future.
Withdrawn	The negotiation document has been withdrawn from the approval process by the category manager.
Approved (not published)	The negotiation document has been approved but can't be published because the open or close dates have expired, or there was an error in publishing the negotiation. The category manager can use the Modify Schedule dialog box to enter new dates and publish the negotiation.
Active	The negotiation document has been approved is accepting responses.
Rejected	The negotiation document was rejected by one or more of the approvers. The category manager can edit the document and resubmit it.

Table 4: Negotiation Status

2.2 RFQ Approval

* approval is under Head of SCM

Click the Notifications (Bell icon) at the top right of the page.

System Notifications

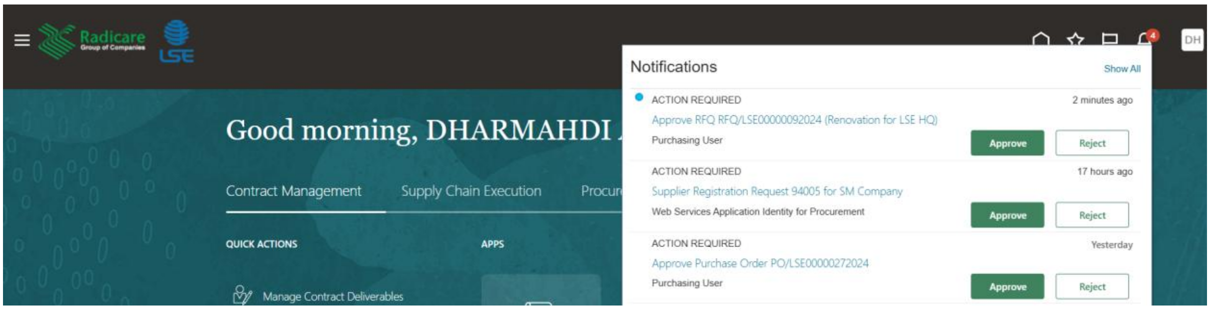
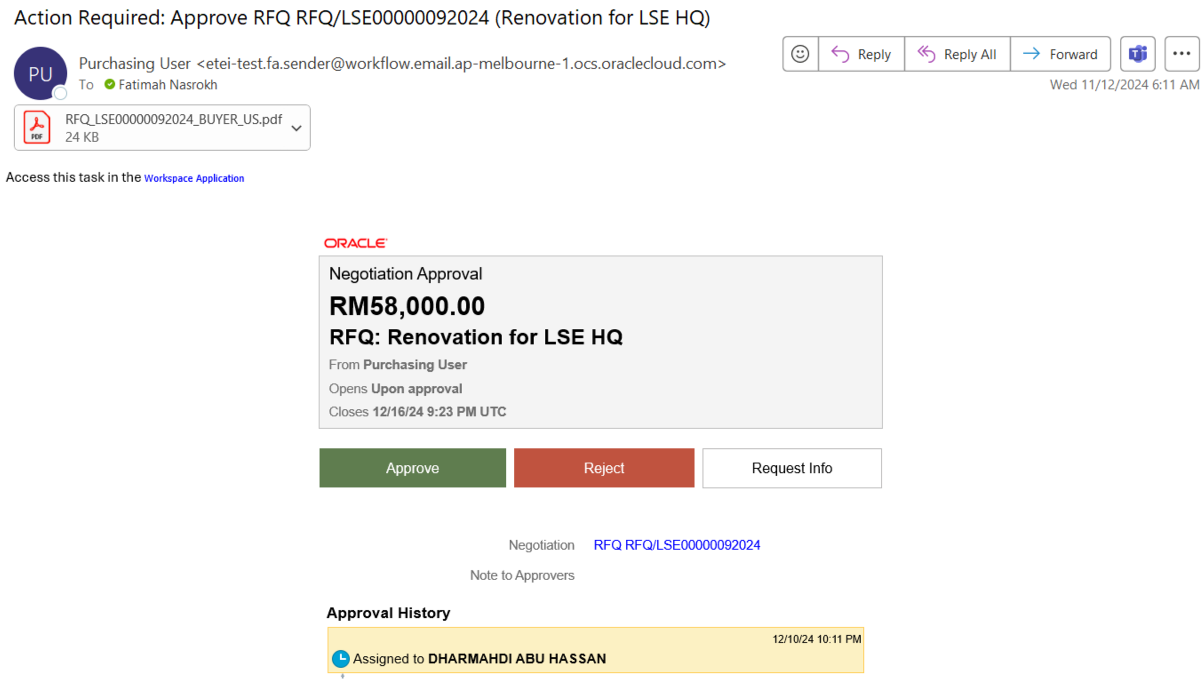


Figure 10: Approver System Notifications RFQ

Email Notifications



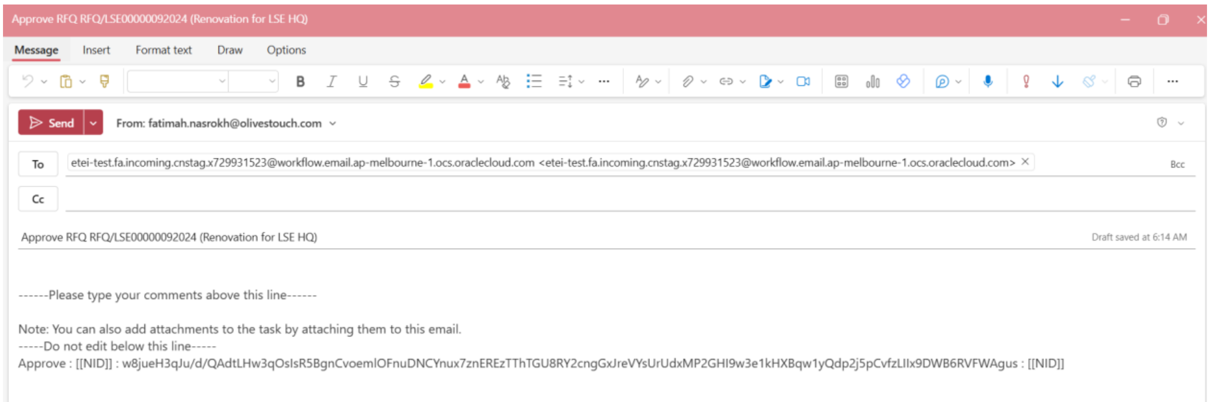
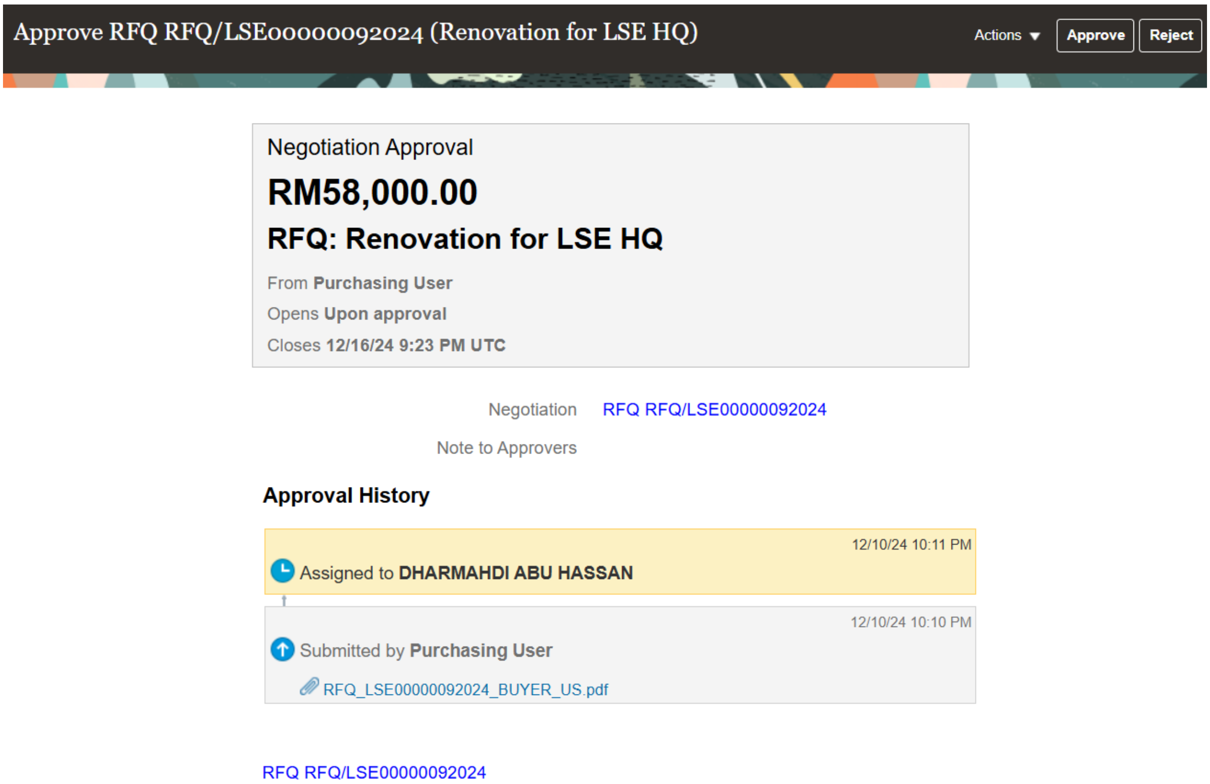


Figure 11: Approver Email Notifications RFQ

<table>
<tr><th>No.</th><th>Steps</th></tr>
<tr><td>1.</td><td>Approver can review detail of the RFQ information before approve.

</td></tr>
<tr><td>2.</td><td>Click Approve or Reject

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

Table 5: RFQ Notification

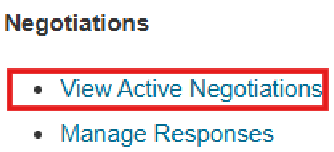
3 CREATE RESPONSE

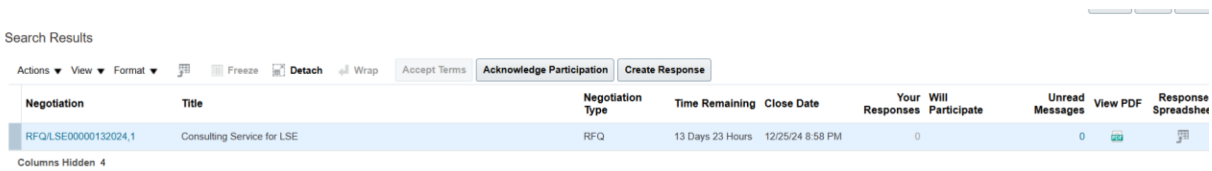
*this section is for Supplier guides on how to response to the RFQ. FYI, RFQ will be sent automatically by email to selected Suppliers.

No.	Work Area	Navigation
1.	Supplier Portal	Supplier Portal

Table 14: Navigation

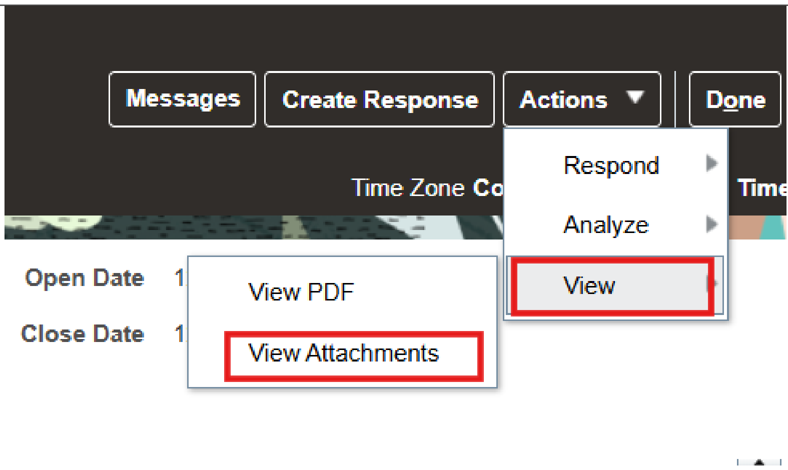
This section is focus on how supplier create response through supplier portal. Once RFQ has been approved and published, then supplier will receive the notification. They can respond to the negotiation through supplier portal if user already have access to supplier portal. Supplier will initially acknowledge the RFQ.

<table>
<tr><th>No.</th><th>Steps</th></tr>
<tr><td>1.</td><td>Go to Negotiations


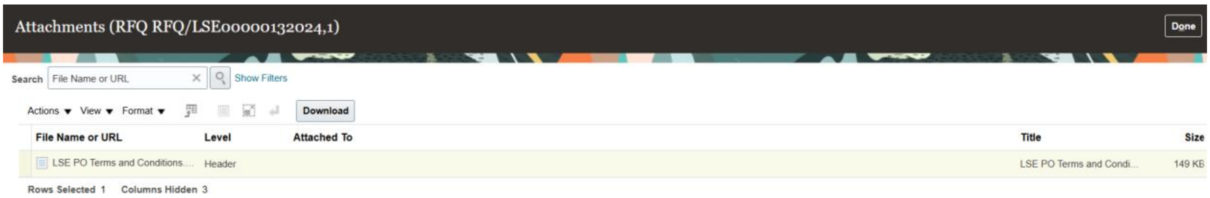
</td></tr>
<tr><td>2.</td><td>Supplier may see the list of active negotiation


</td></tr>
<tr><td>3.</td><td>Each negotiation in the system has multiple sections. To view each section, click on the corresponding link in the Table of Content.


</td></tr>
<tr><td>4.</td><td>Supplier can view attachment from buyer for example Terms & Condition</td></tr>
</table>

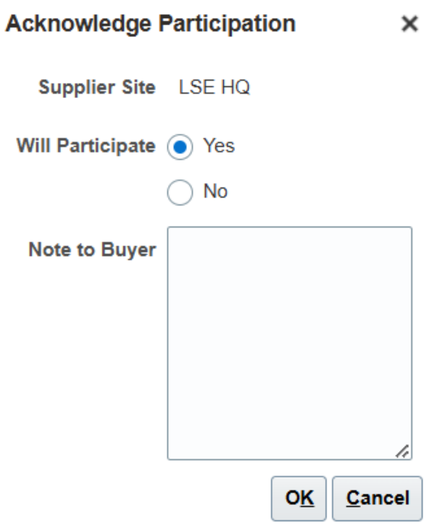


5. All files attached to the negotiation are listed on the Attachments page.
Supplier can download.



6. Supplier can click Acknowledge Participation to an ongoing negotiation that they interested.

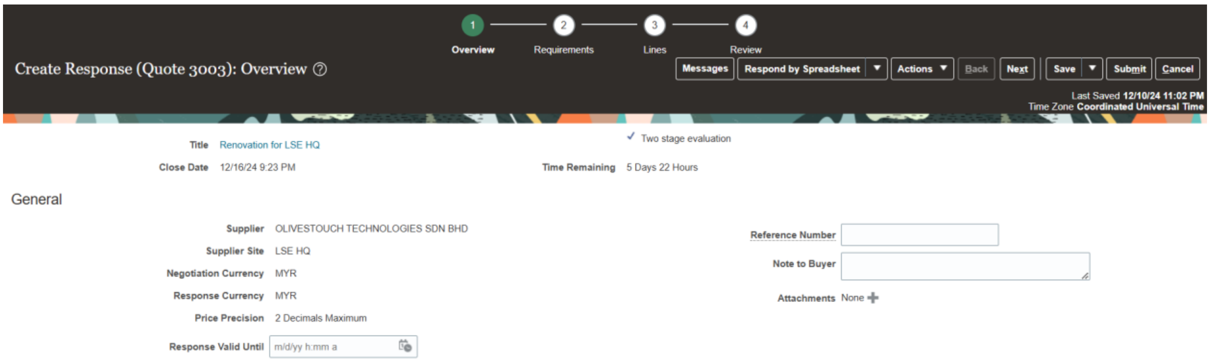
7.



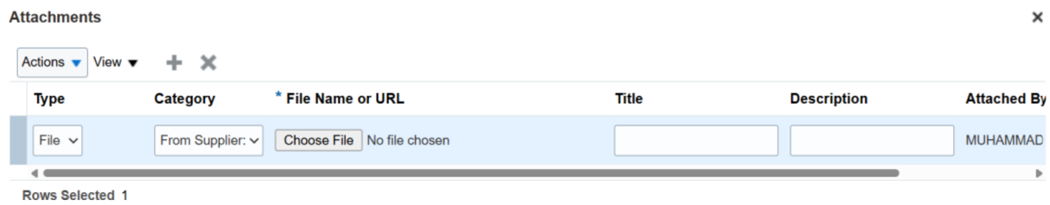
8. Create Response

Refer Overview tab and enter information

⚠ On each page the Time Remaining and Close Date is presented. These date are indicating the deadline for the quote submission.



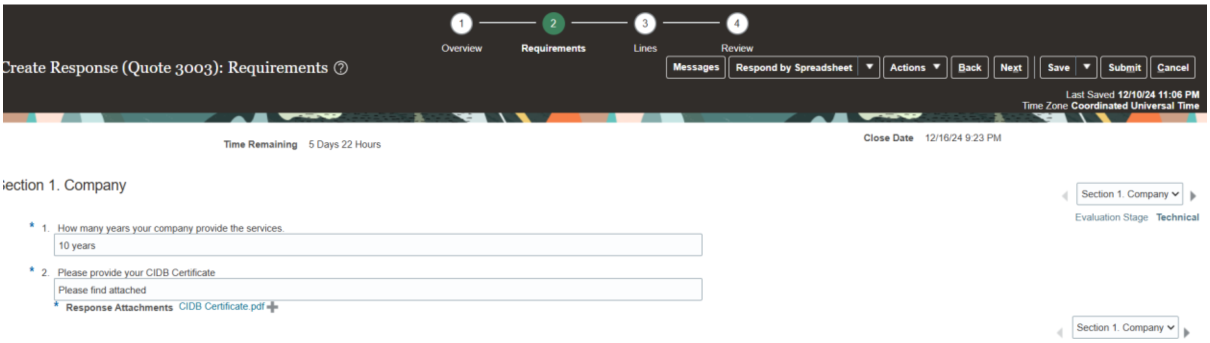
Supplier can attach file during the response submission.

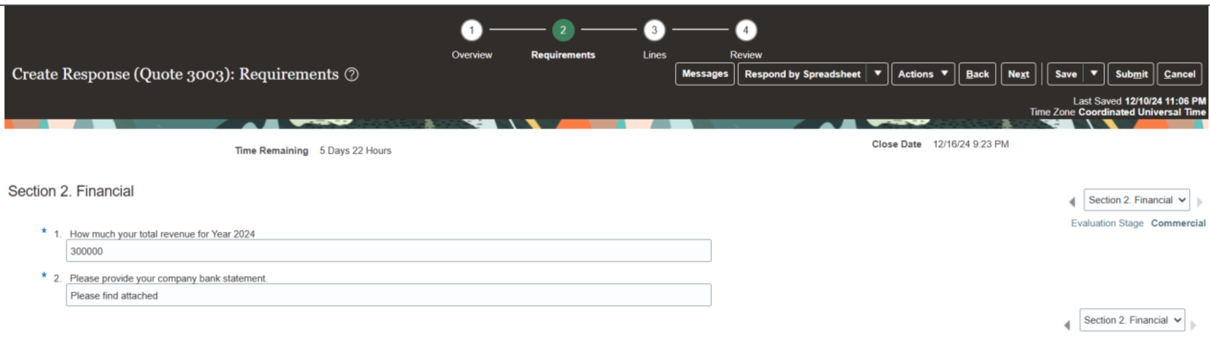


9. Refer Requirement Tab

Suppliers will answer negotiation questions (Requirement)

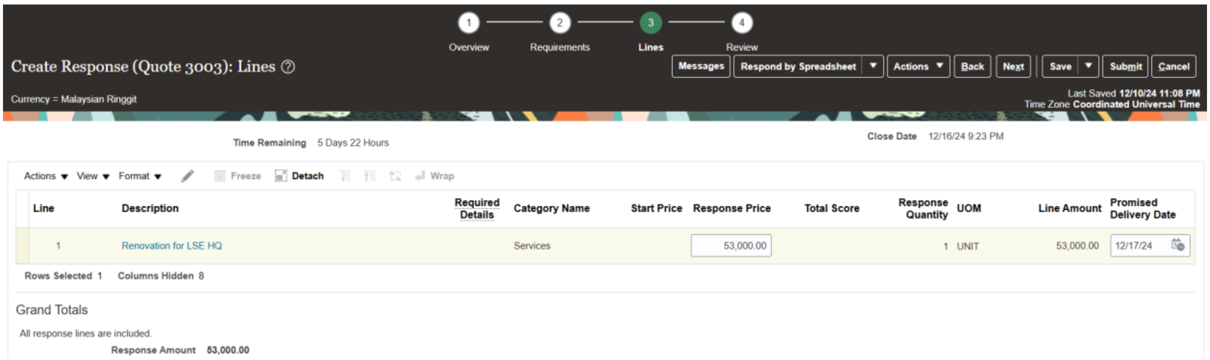
⚠ Response Required: When a question is marked by a start, it means that answering the question is mandatory to submit the quote response.



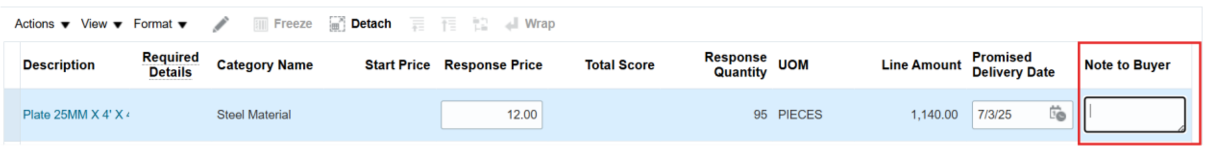


10. Refer Lines Tab.

Supplier will enter price offer in *response price.*



Suppliers need to enter the details of the specification for line purchase at Note to Buyer.



Suppliers can review the response by clicking Review. Once the response is validated, click on Submit button.

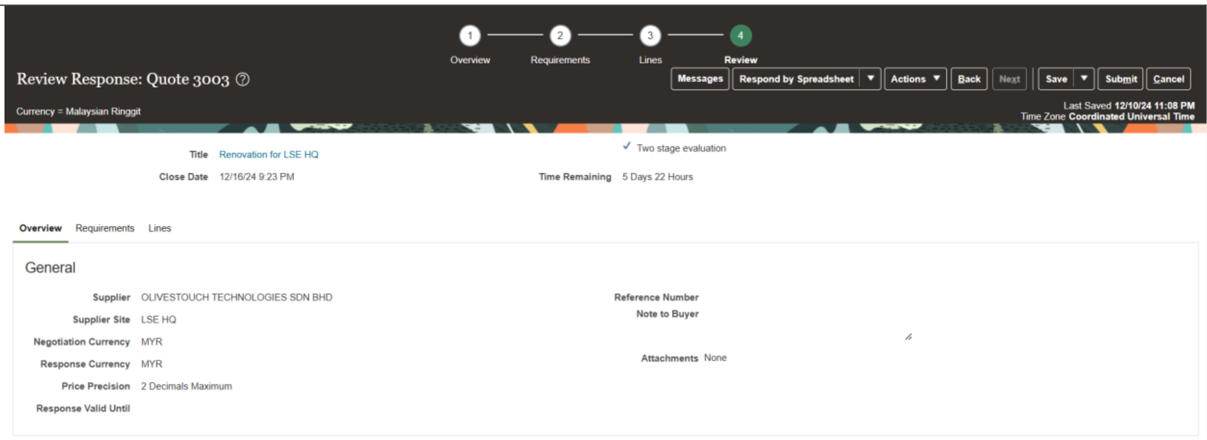
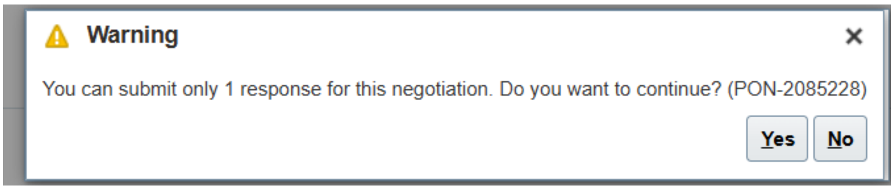
	
11.	

Table 6: Creation Supplier Response

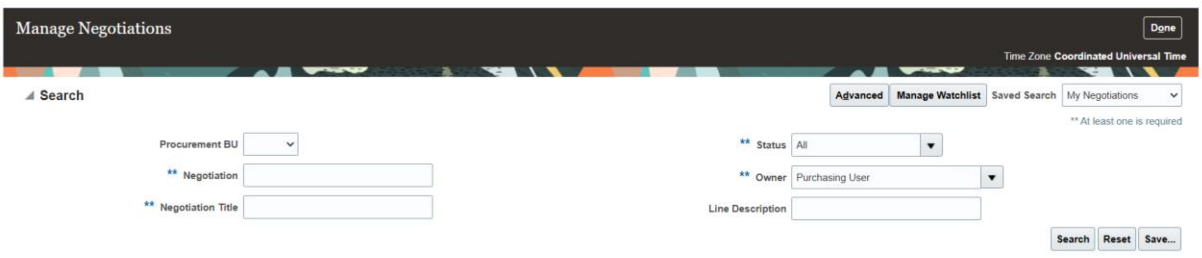
4 CREATE EVALUATION

To proceed with the evaluation, the RFQ status should be closed. The close date is defined during RFQ Creation. Procurement has the option to advance close the RFQ if required.

No.	Work Area	Navigation
1.	Procurement	Negotiations

Table 7: Navigation

4.1 Close RFQ

No.	Steps
1.	Click on Task 
2.	Click Manage Negotiations 
3.	Search and Open the RFQ 
4.	Click Actions Click Manage Click Close

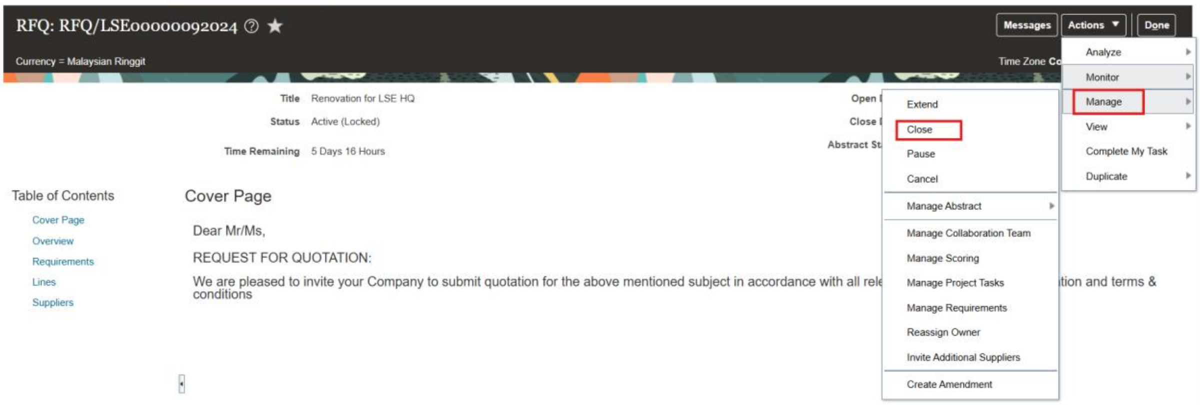
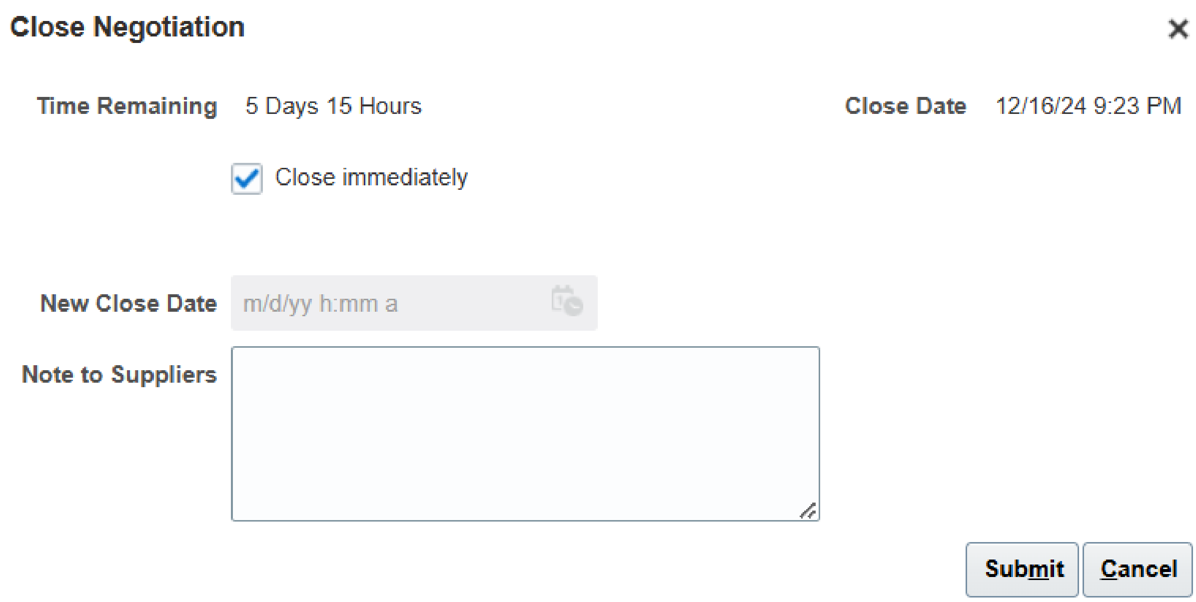
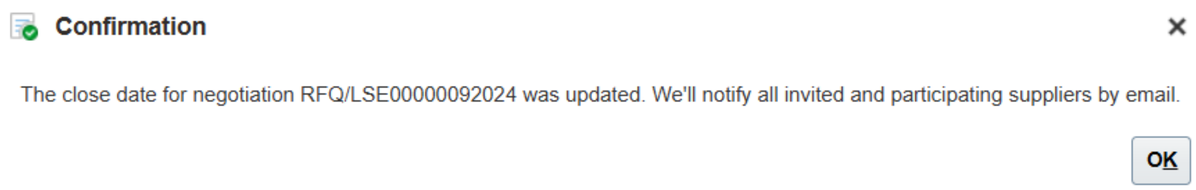
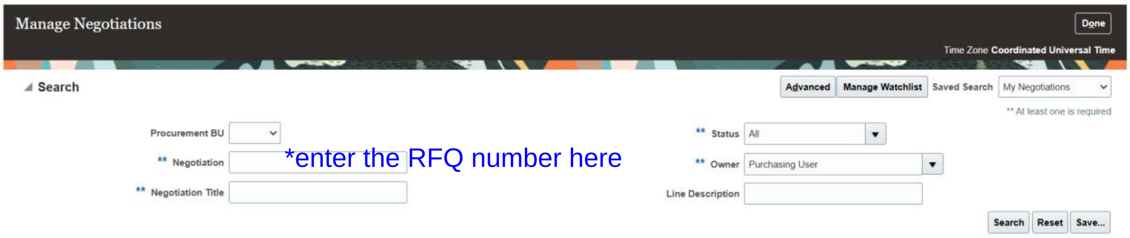
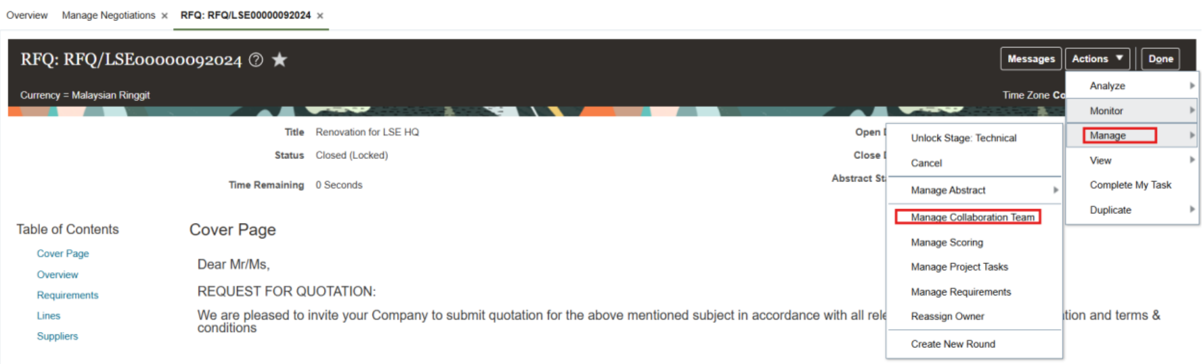
<table>
<tr><td></td><td>
</td></tr>
<tr><td>5.</td><td>Click Submit button

</td></tr>
<tr><td>6.</td><td>
</td></tr>
</table>

Table 8: Close RFQ

4.2 Manage Collaboration Teams

*For TBE and CBE processes

No.	Steps
1.	Click on Task
2.	Click Manage Negotiations 
3.	Search and Open the RFQ 
4.	Click Actions Click Manage Click Manage Collaboration Team 
5.	Choose team member and send notifications. Evaluators will receive the notifications.

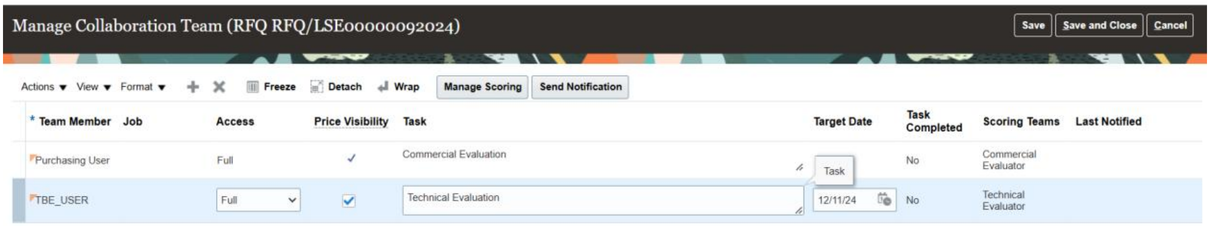
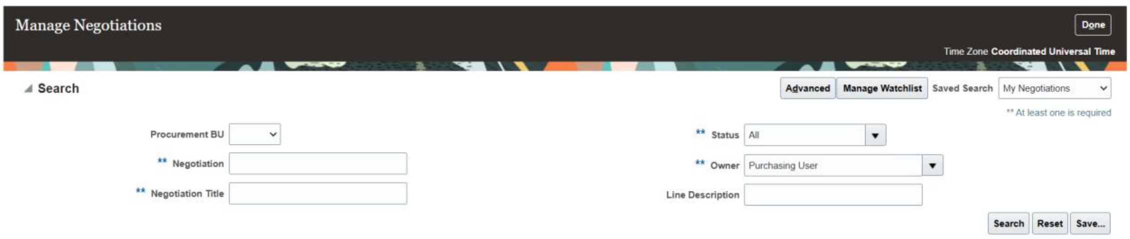
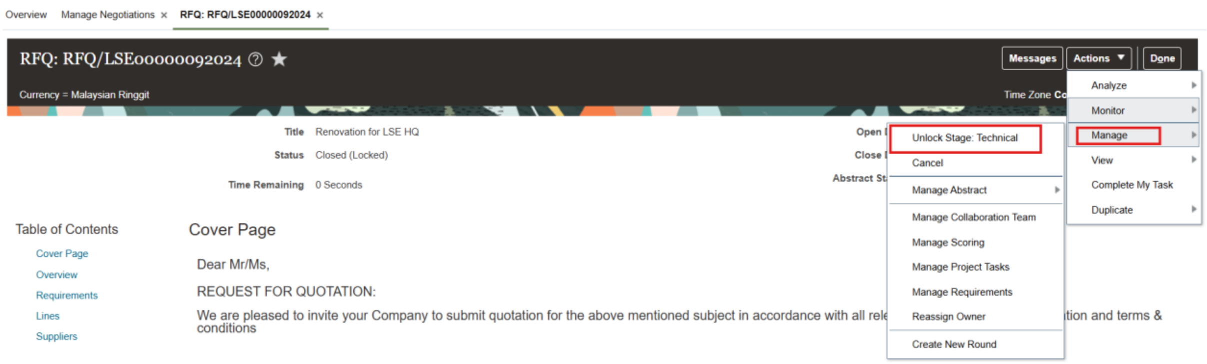
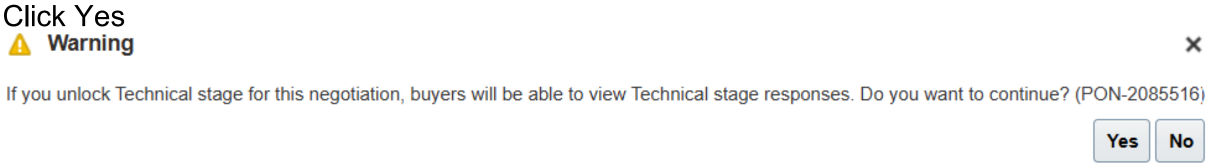
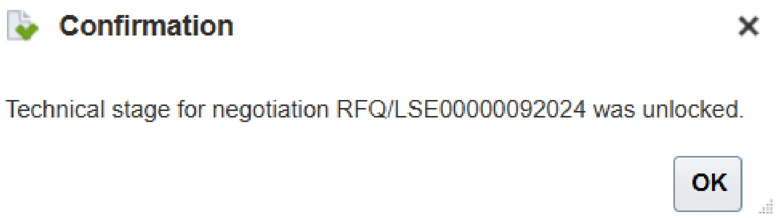
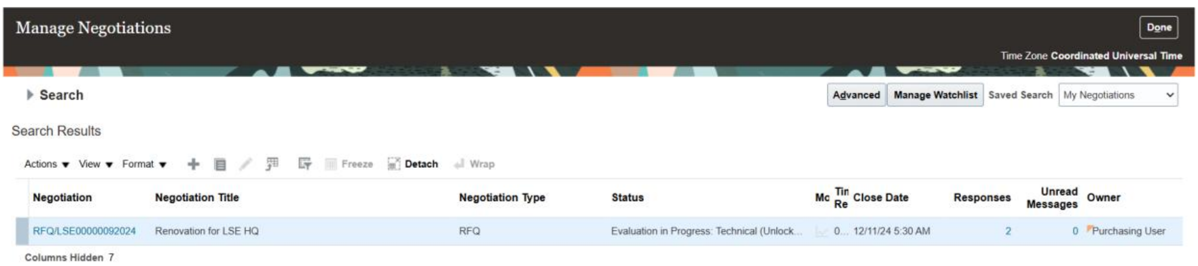
	

Table 9: Manage Collaboration Teams

4.3 Unlocked and Unsealed Technical Stage

No.	Steps
1.	Click on Task 
2.	Click Manage Negotiations 
3.	Search and Open the RFQ 
4.	Click Actions Click Manage Click Unlock Stage: Technical

	
5.	Click Yes 
6.	 Click OK
7.	The status change to **Evaluation in Progress: Technical (Unlocked)** 
8.	Click Actions Click Manage Click Unseal Stage: Technical

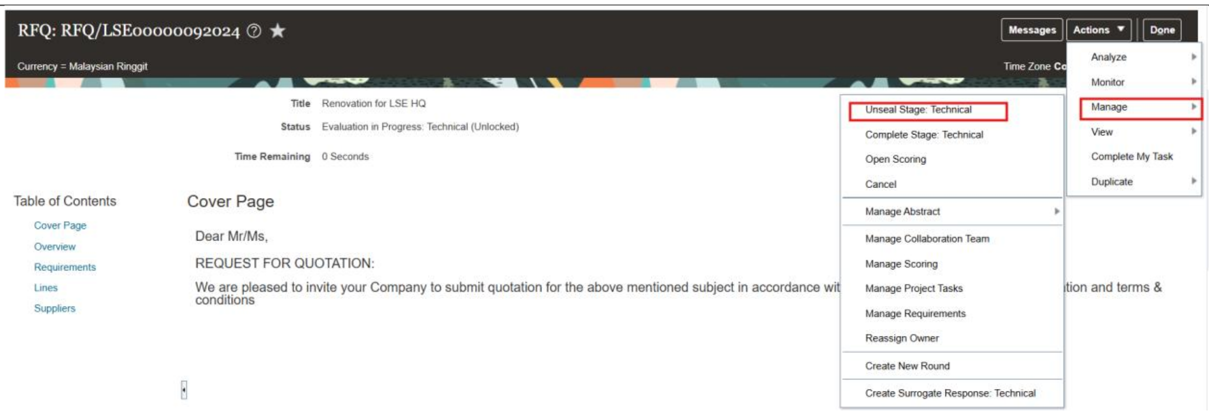
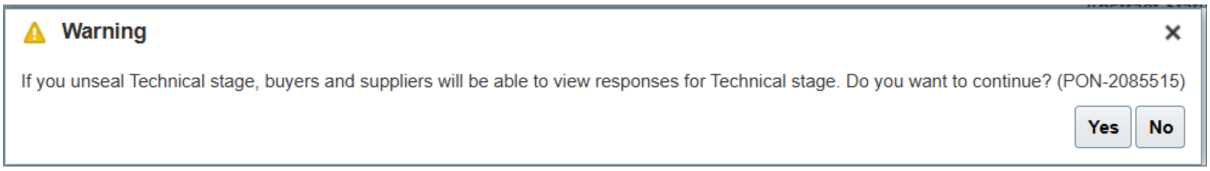
	
9.	 The status change to **Evaluation in Progress: Technical (Unsealed)**

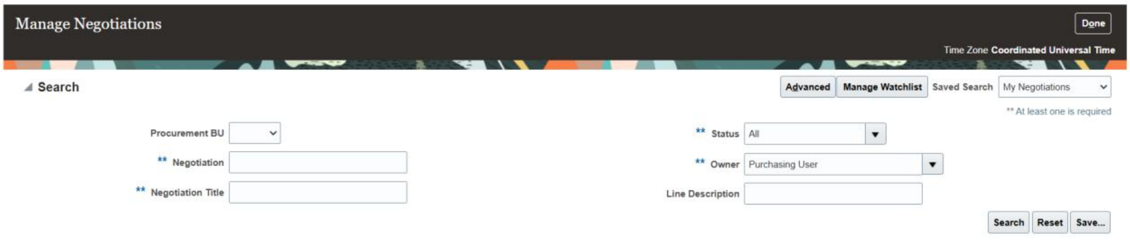
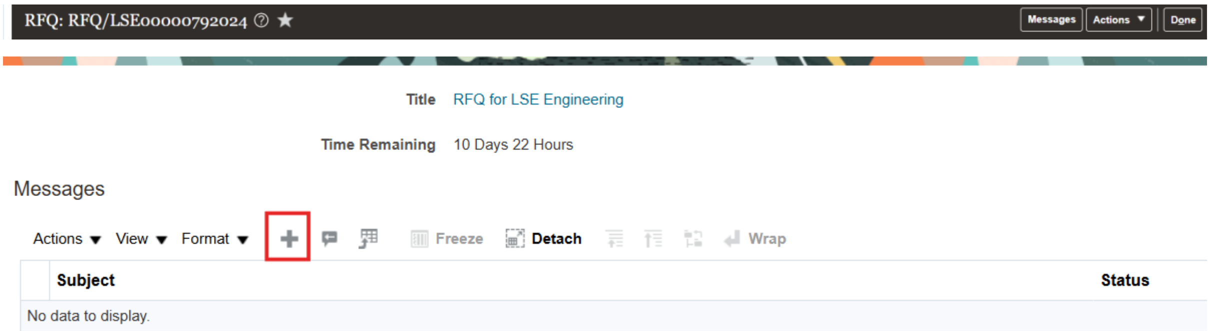
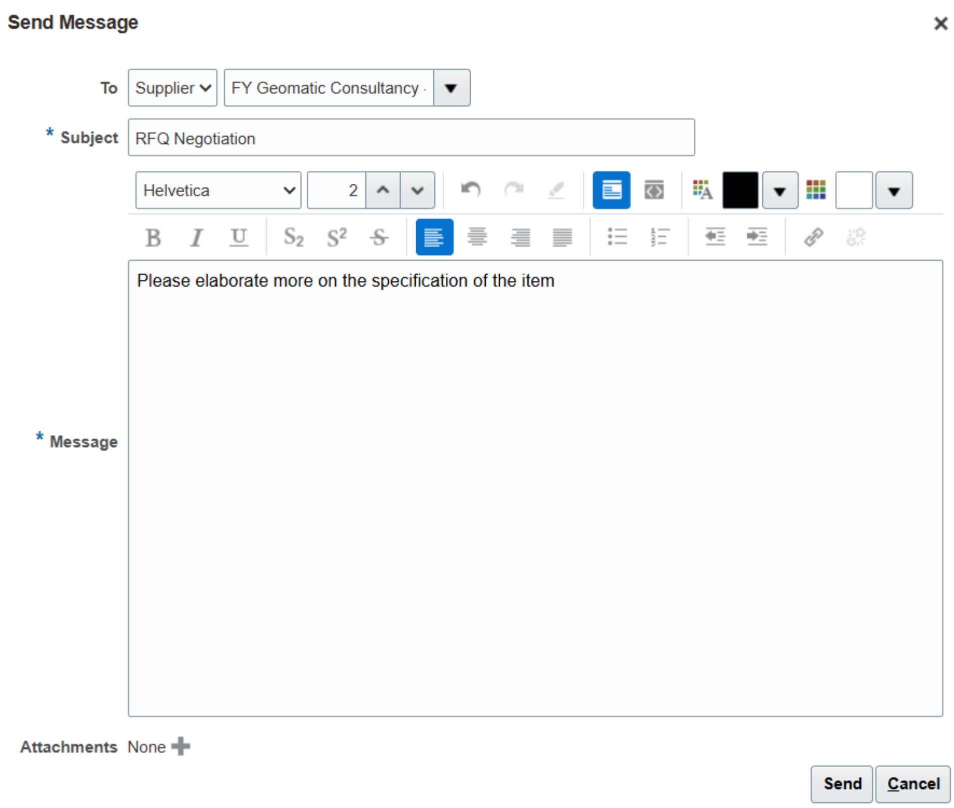
Table 10: Unlocked and Unsealed Technical Stage

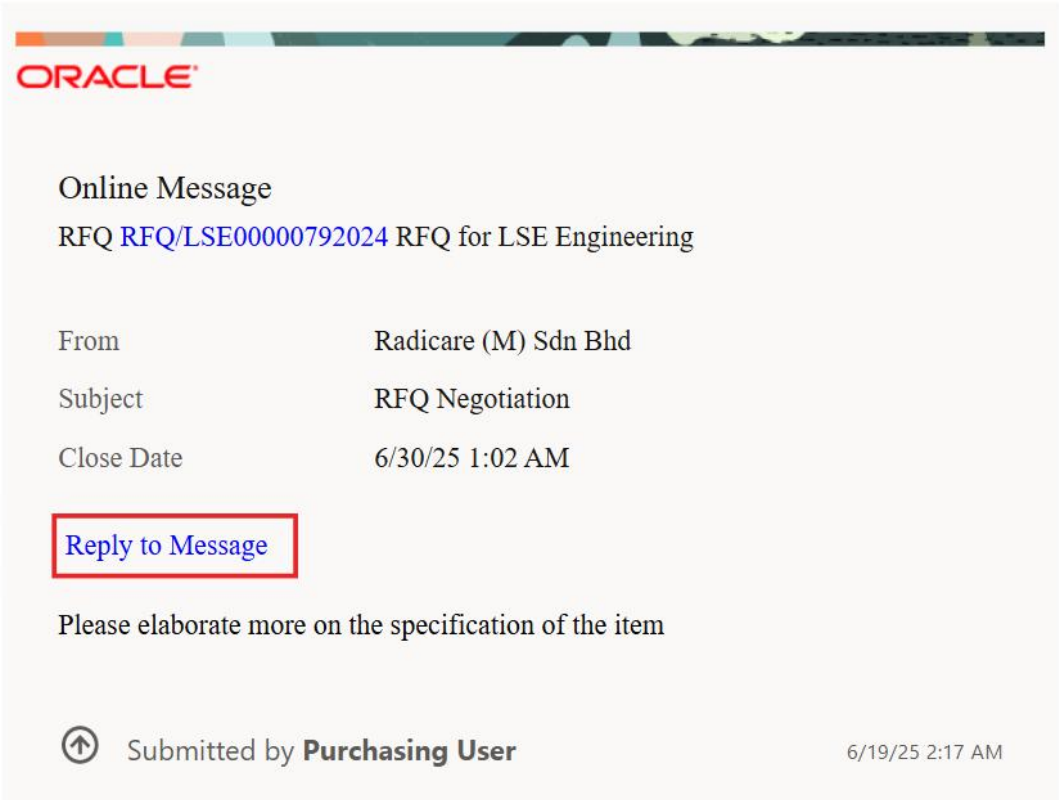
*After unlocked and and unsealed, TBE Team will download the Scoring format from Oracle, and conduct TBE seating(outside system).

4.4 Online conversation with supplier

This function is used when collaboration teams want to communicate with supplier via online. -> in other words, if TBE team need more clarifications, boleh communicate dgn supplier terus thru email

No.	Steps
1.	Click on Task 
2.	Click Manage Negotiations 
3.	Search and Open the RFQ

<table>
<tr><td></td><td>
</td></tr>
<tr><td>4.</td><td>Click Messages
Click '+' icon

</td></tr>
<tr><td>5.</td><td>Enter message information
Click Send

</td></tr>
<tr><td>6.</td><td>Supplier will receive the notification</td></tr>
</table>

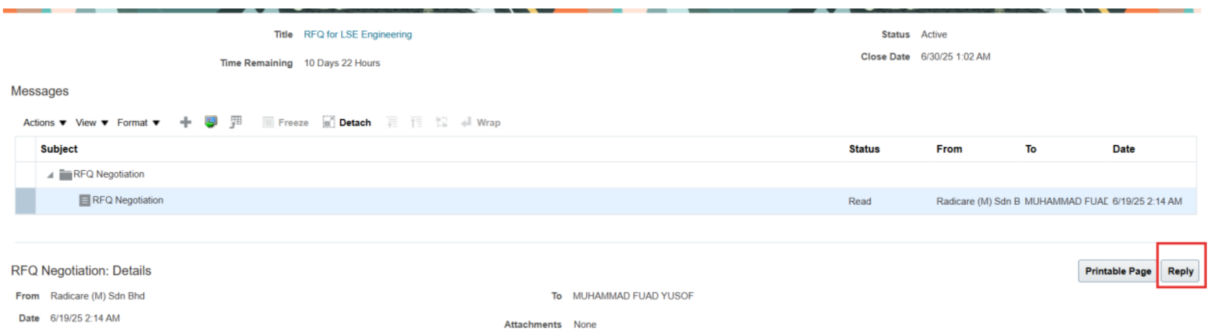


Click Reply to Message

It will automatically link to the login page.

Suppliers enter username/password.

7. Supplier reply by click Reply button.



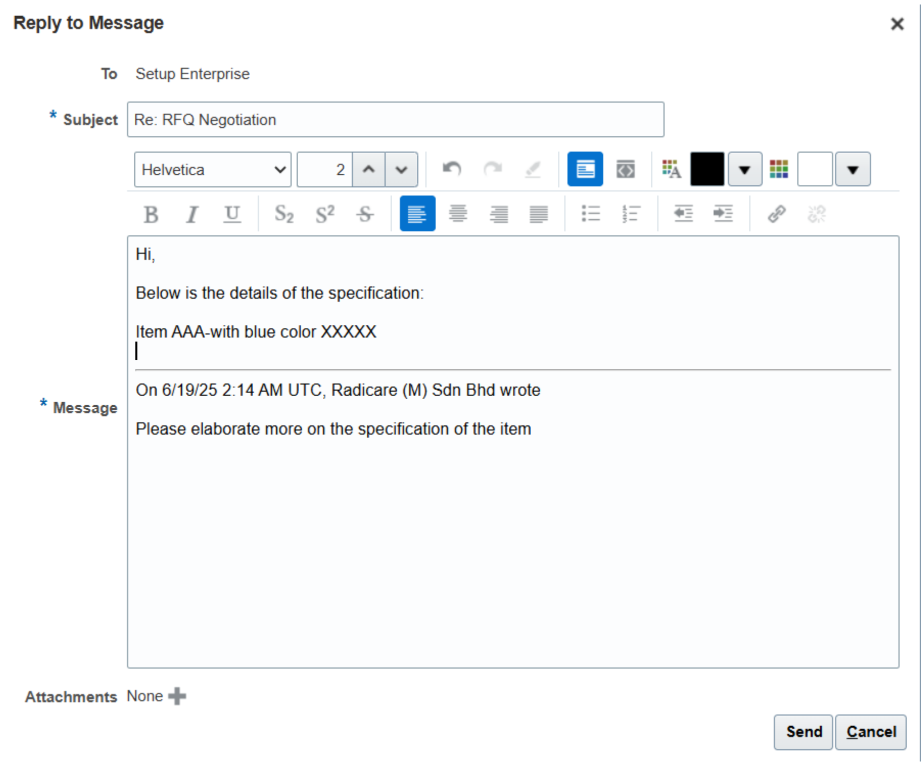
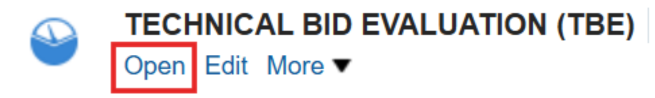
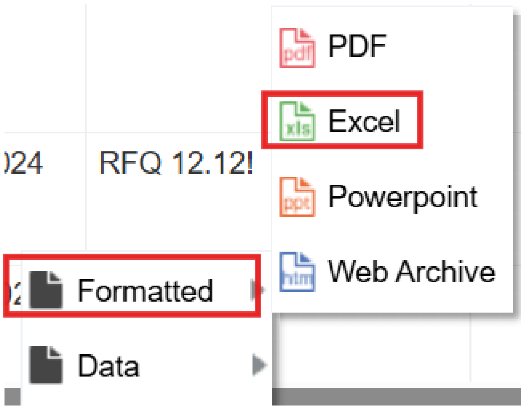
8.	Enter messages.  Click Send button.

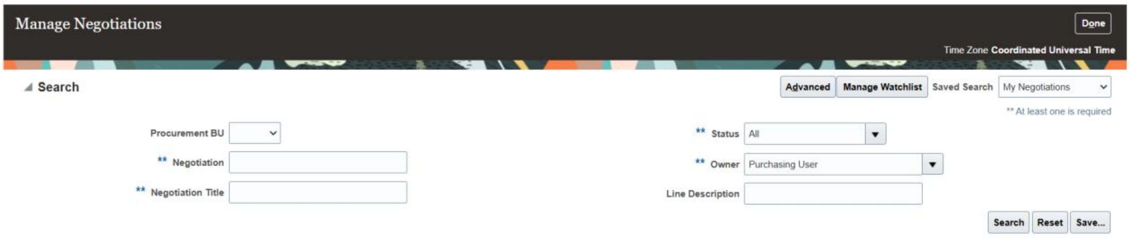
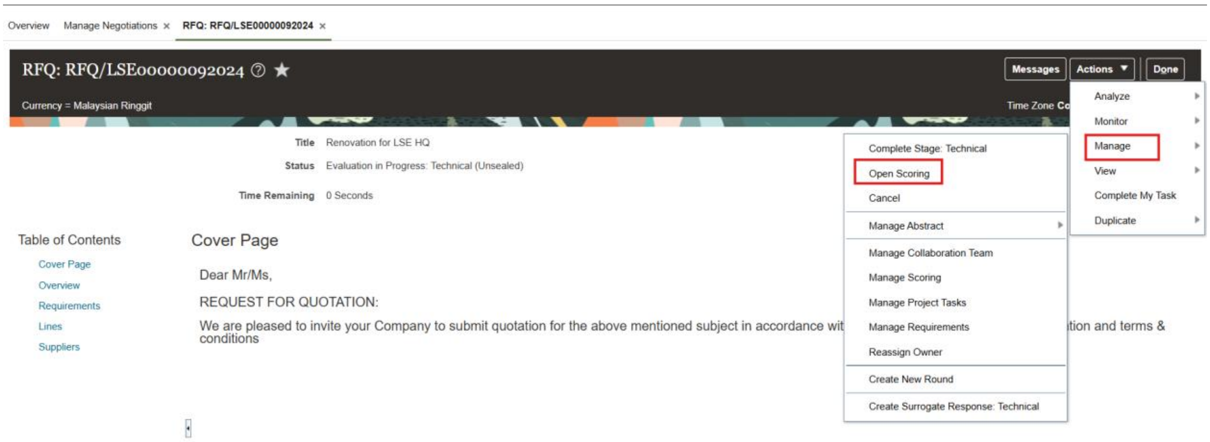
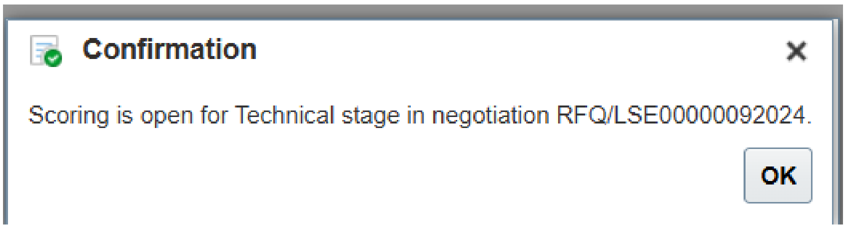
Table 11: Online Message with supplier

*This conversation with Supplier can happen anywhere during the TBE as long as the TBE is still Open.

4.5 Scoring RFQ

*TBE team will seat for TBE evaluation outside system. Once agreement on choosing supplier is done, TBE form will be signed and uploaded into Oracle as attachment.

No.	Steps
1.	TBE Evaluator runs TBE form from Reports and Analytics. *format in tabulation form, per supplier.   Click Enter parameter to view on specific RFQ.   Click Export and choose Excel. Amend the TBE Form by adding the signature part. After TBE form is completed then LSE can proceed for TBE Seating.
2.	After supplier is selected, then TBE user can login into oracle to enter the result and scoring.
3.	Click on Task 
4.	Click Manage Negotiations

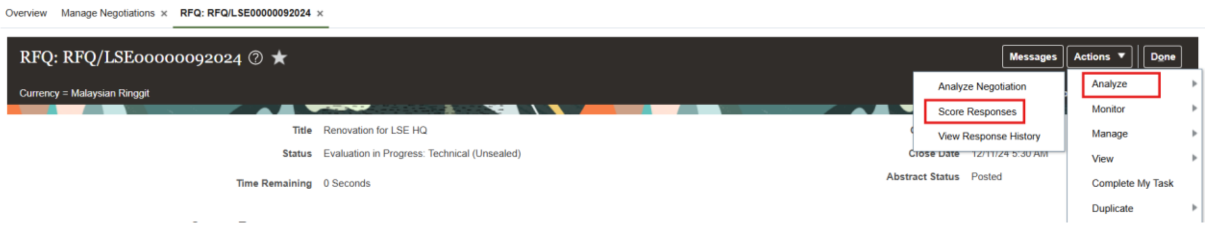
	
5.	Search and Open the RFQ 
6.	Click Actions Click Manage Click Open Scoring 
7.	 Click OK

8.

Click Actions

Click Analyze

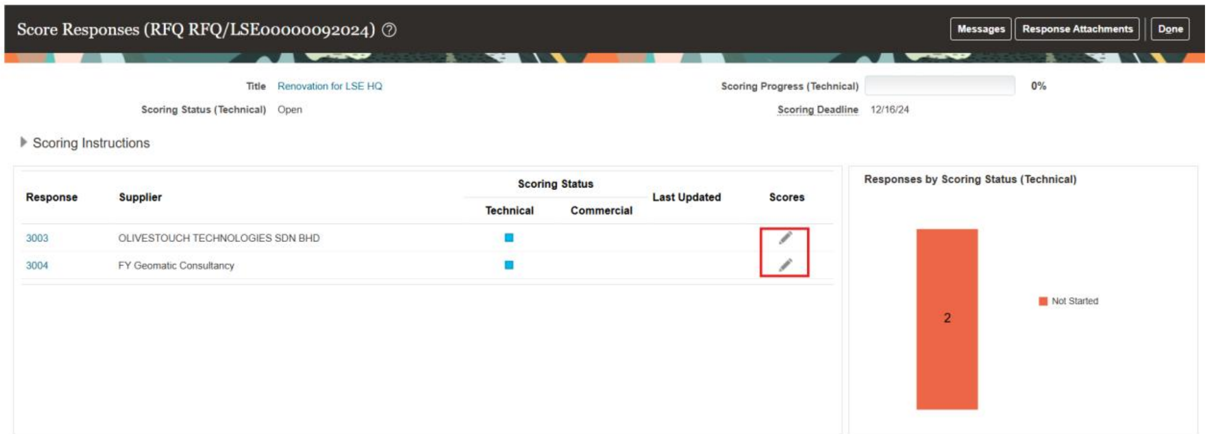
Click Score Responses



9.

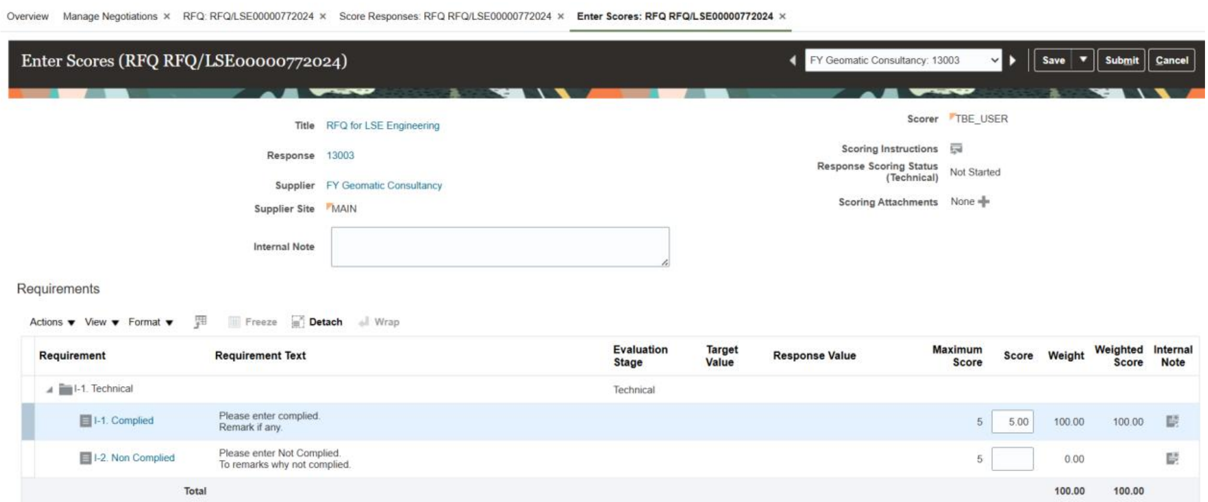
TBE Evaluator can proceed to perform **technical evaluation**

Click icon



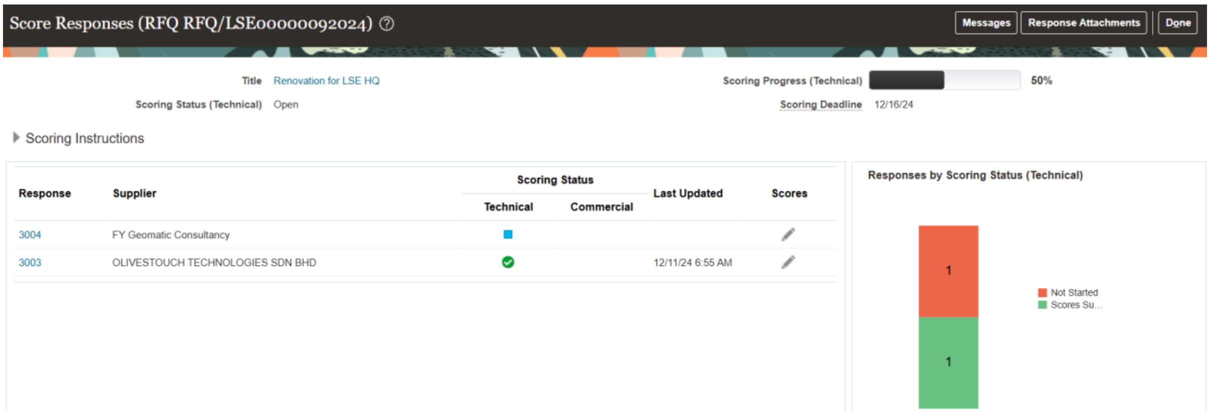
10.

Enter score for supplier

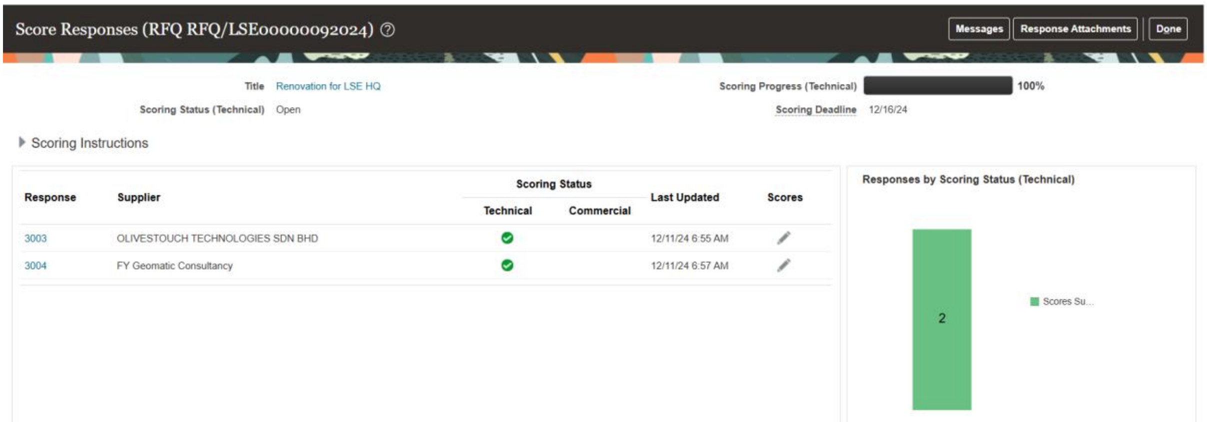


TBE users can attach TBE form during scoring by clicking Scoring Attachments.

11. User can view Scoring Progress – In Progress



12. User can view scoring progress – Completed

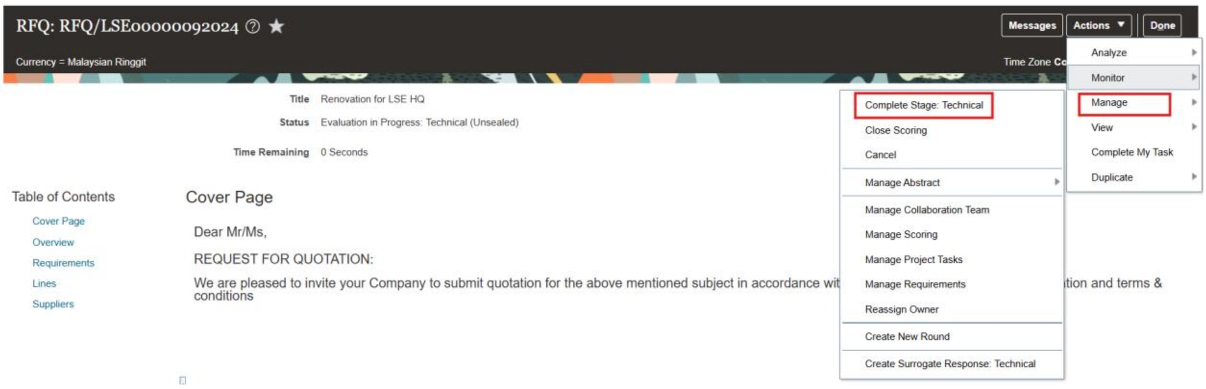


13. The buyer will complete the technical evaluation stage.

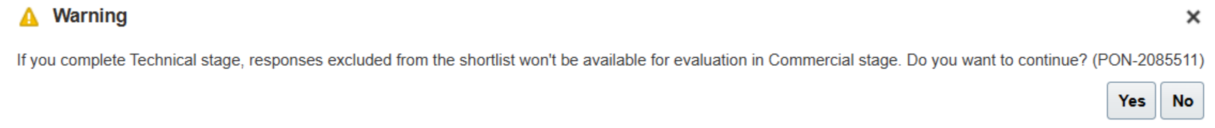
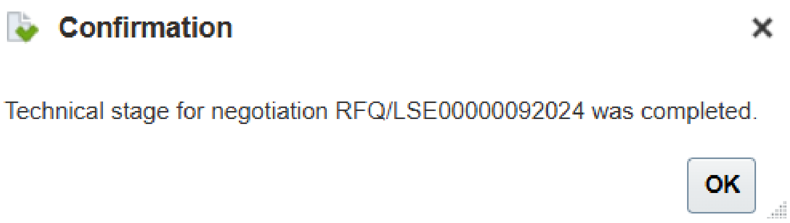
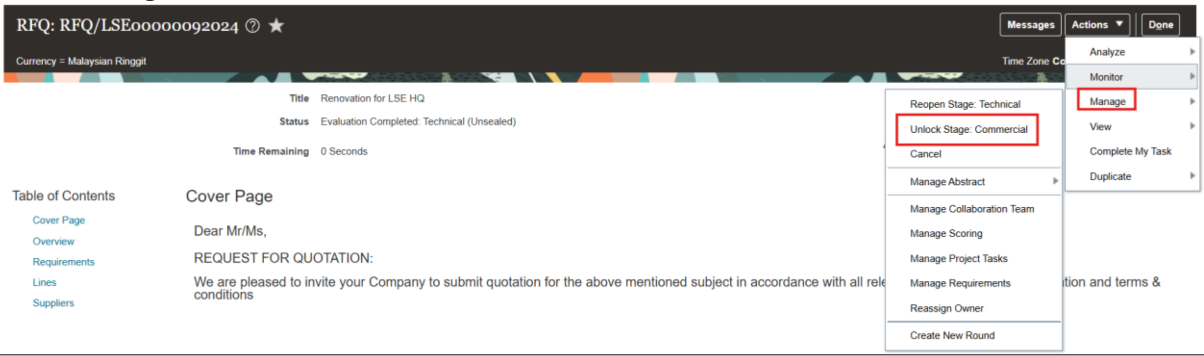
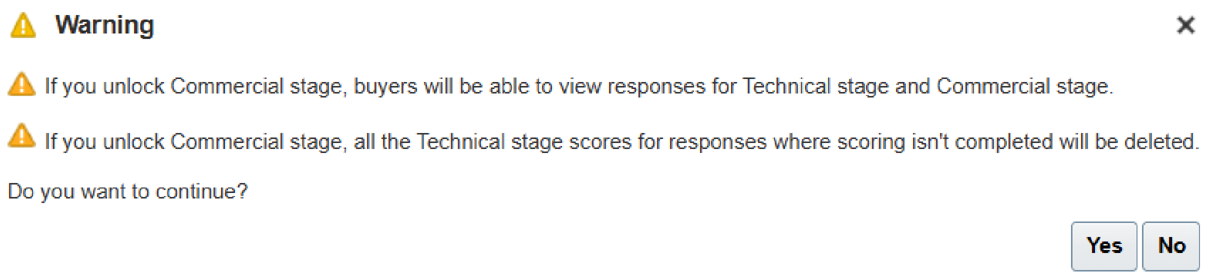
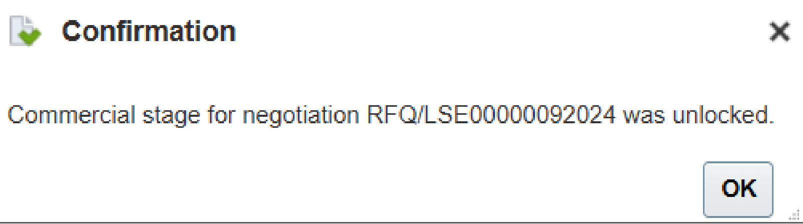
Click Actions

Click Manage

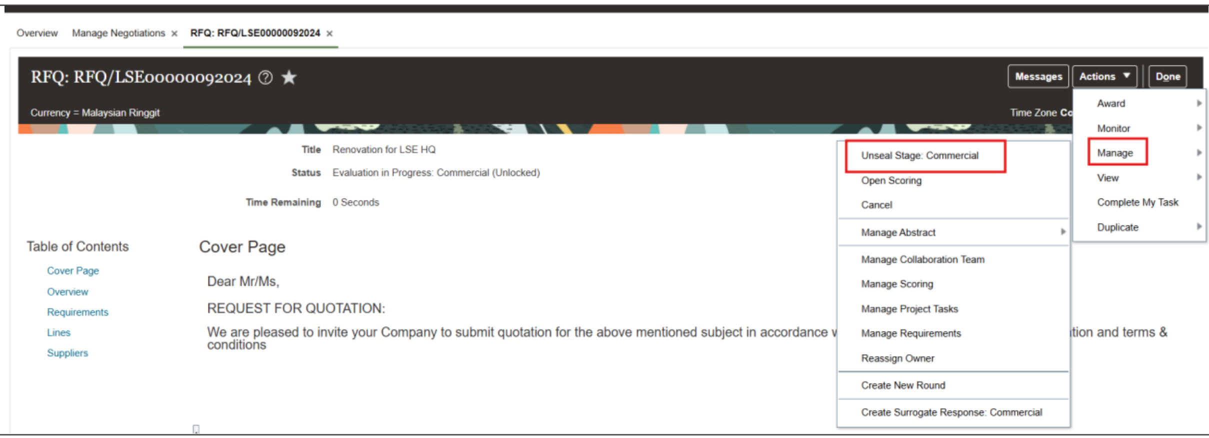
Click Complete Stage: Technical



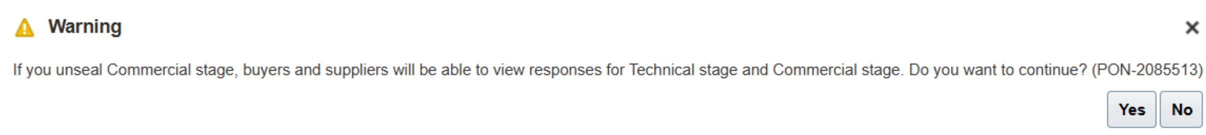
14. Click Yes

	
15.	 Click OK
16.	The status will change **Evaluation Completed: Technical (Unsealed)** *Only after completed, baru boleh CBE.
17.	Unlock Stage Commercial *CBE will be done by Purchasing user/buyer 
18.	Click 
19.	Click OK 

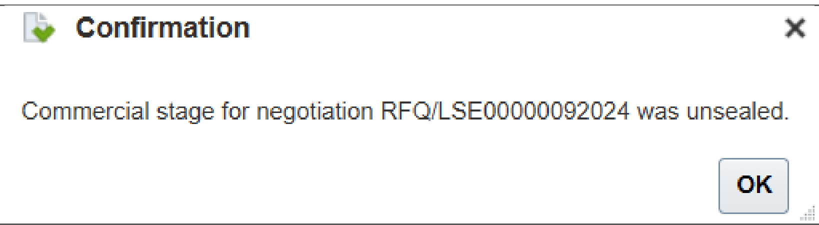
20.



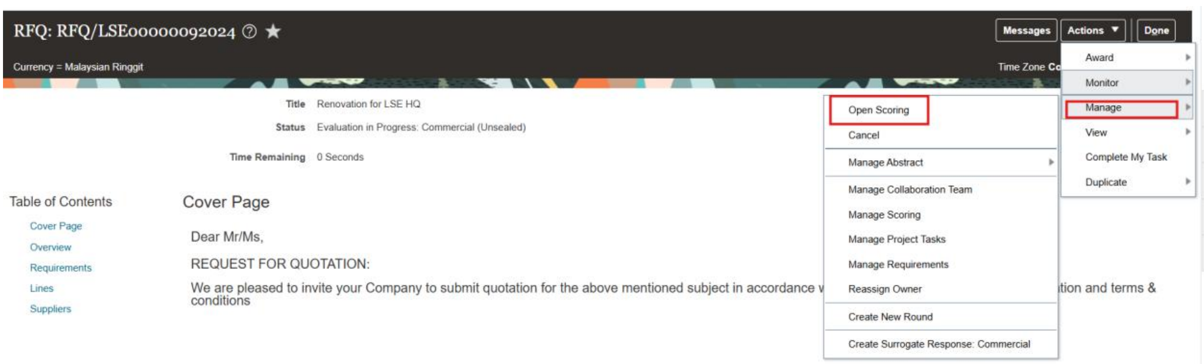
21.



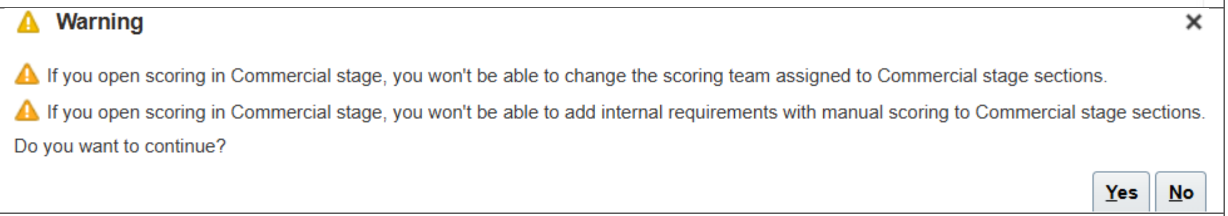
22.



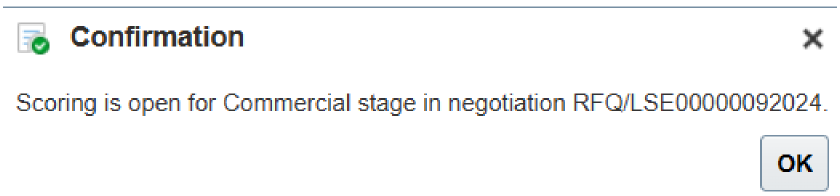
23.



24.

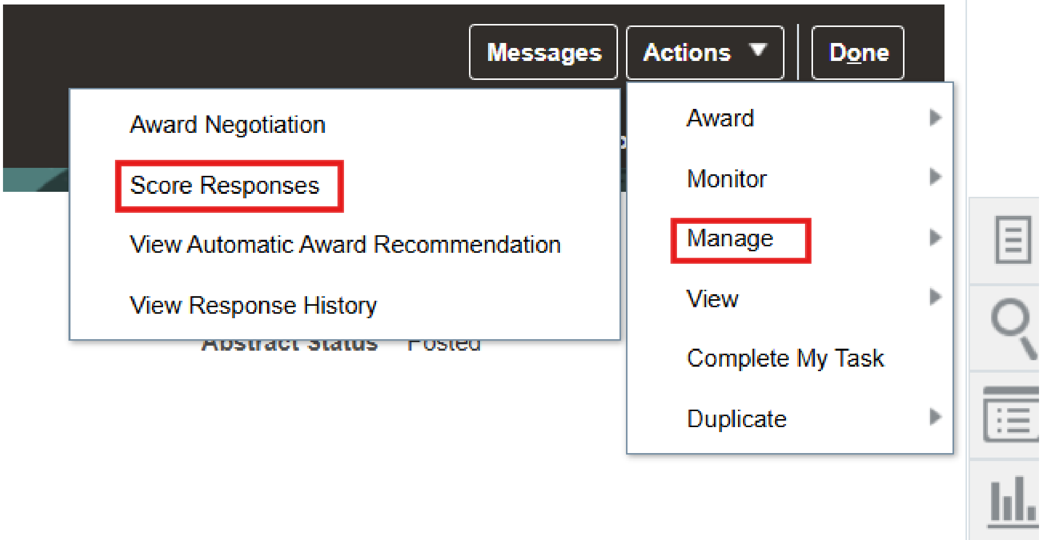


25.

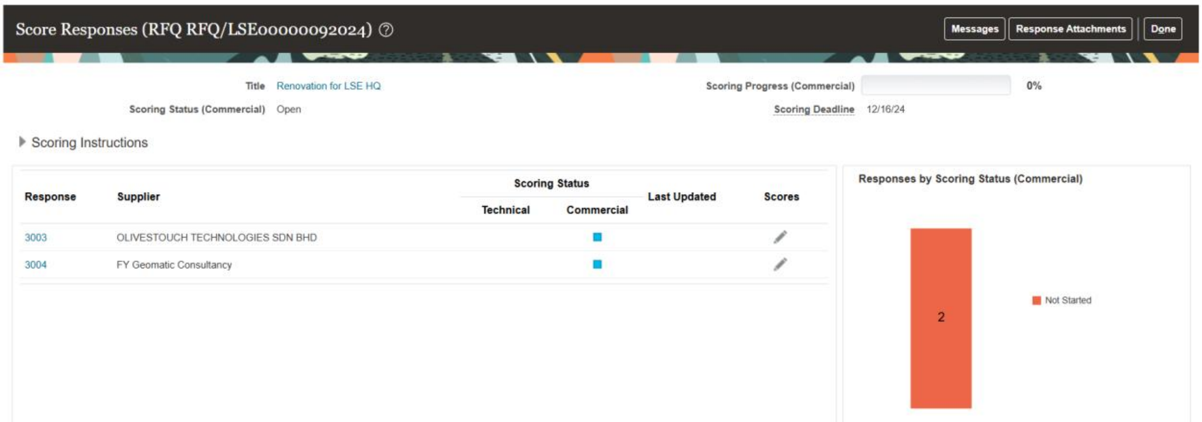


26. Status of RFQ change to Evaluation in Progress: Commercial (Unsealed)

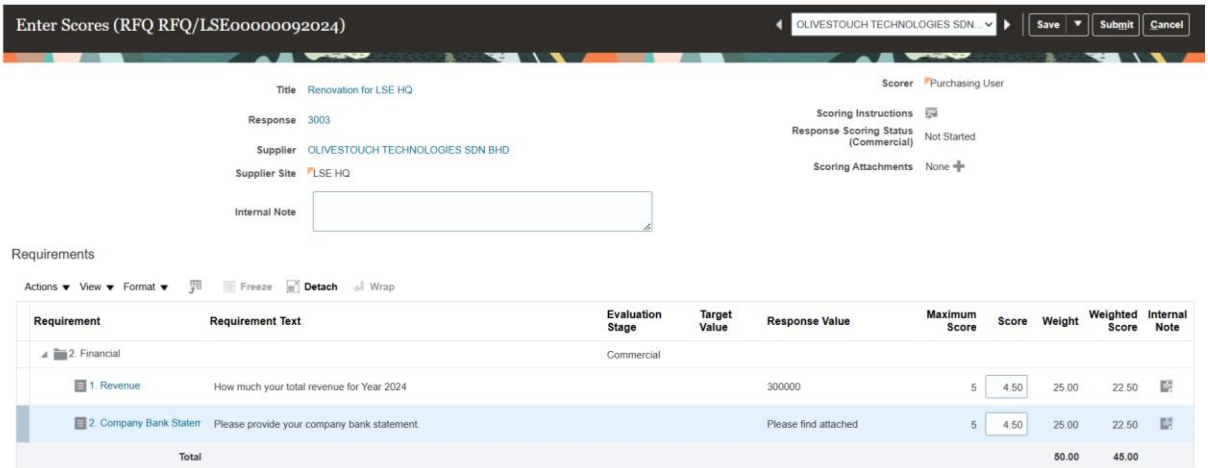
27.



28. Purchasing User can start with commercial evaluation.



29.



30.

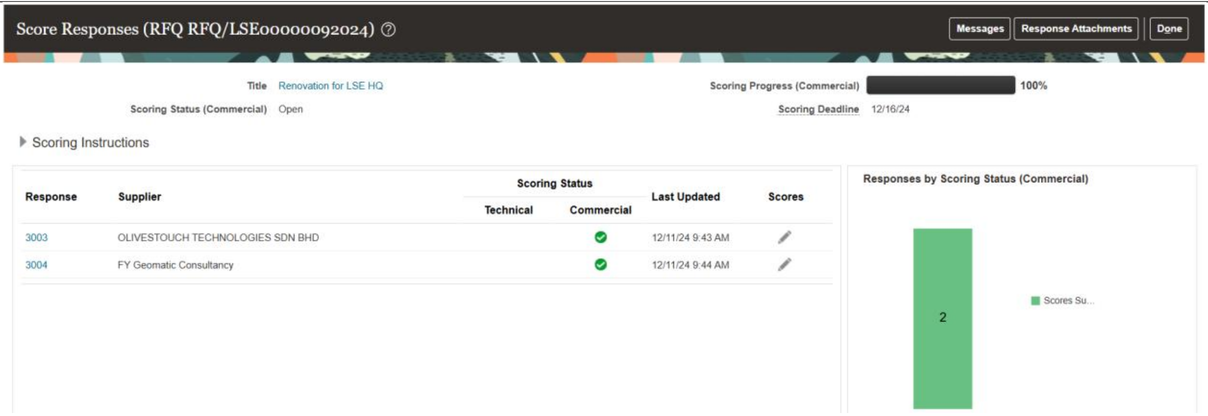
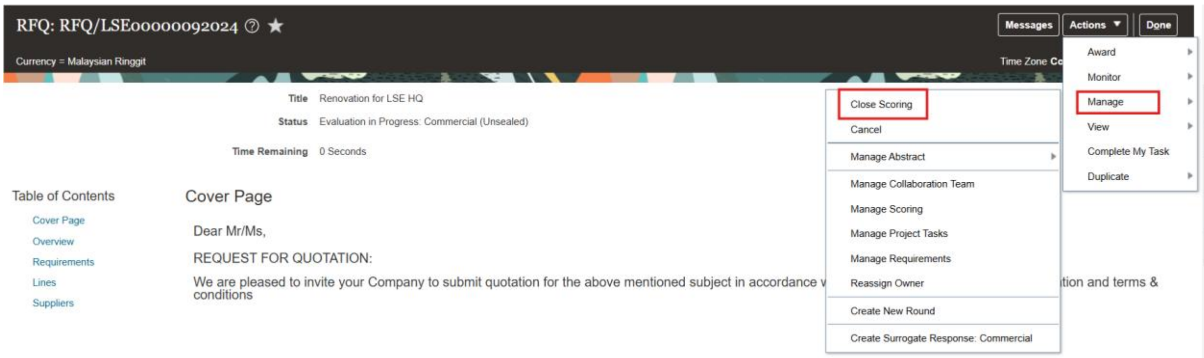
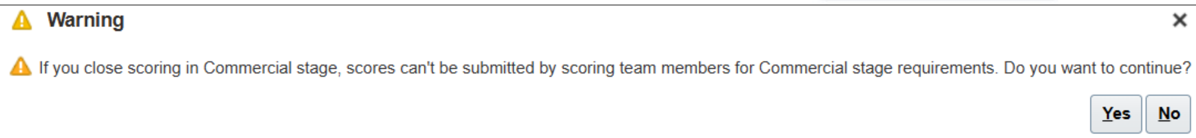
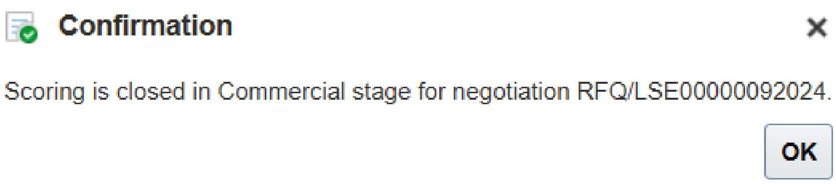
<table>
<tr><td></td><td>
</td></tr>
<tr><td>31.</td><td>
</td></tr>
<tr><td>32.</td><td>
</td></tr>
<tr><td>33.</td><td>
</td></tr>
</table>

Table 12: Scoring RFQ

*Signed TBE and CBE form MUST be uploaded to Oracle as attachment as supporting documents.

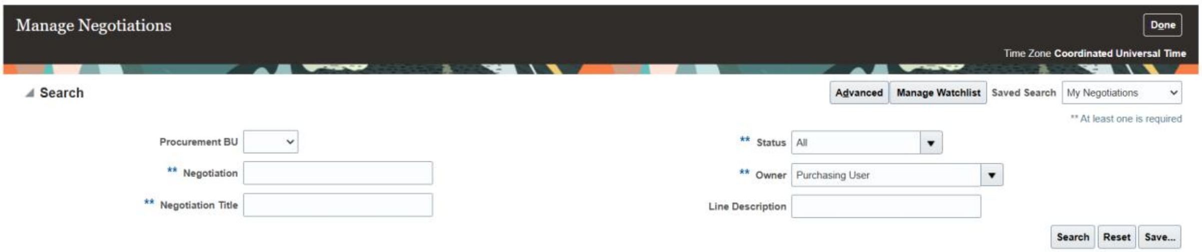
5 AWARD

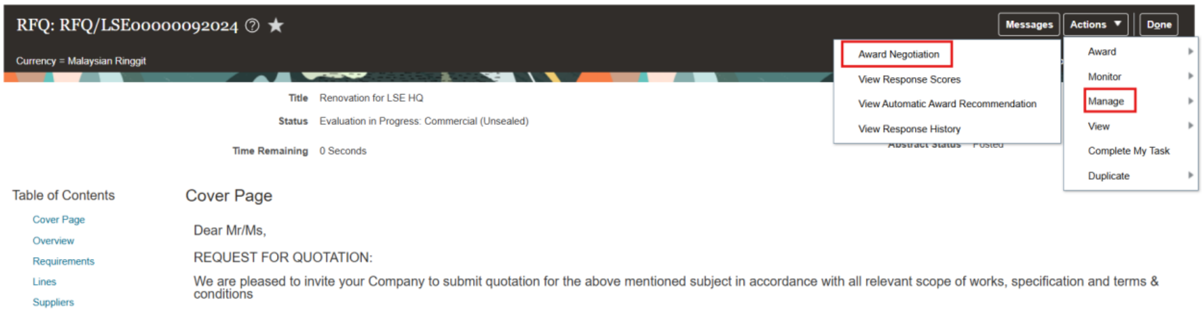
*Issuance of PO to supplier

No.	Work Area	Navigation
1.	Procurement	Negotiation

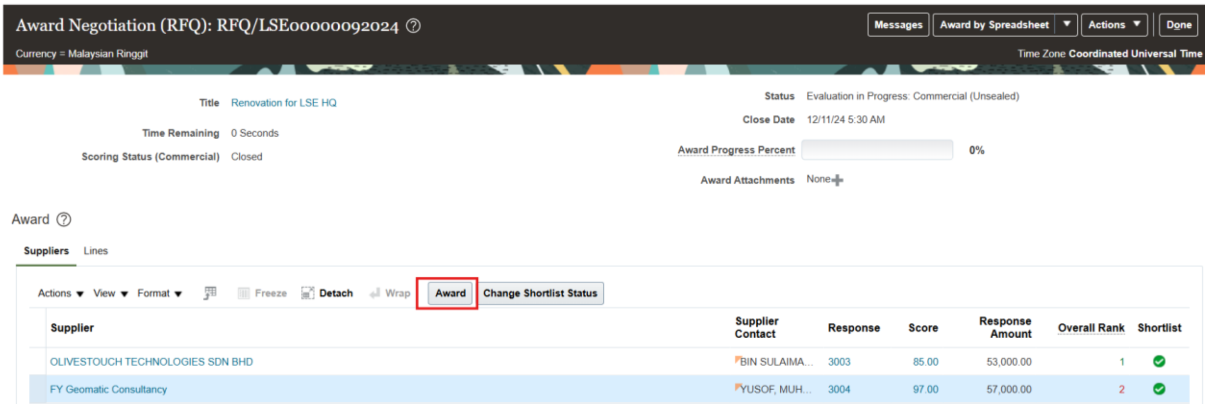
Table 13: Navigation

5.1 Award Supplier

No.	Steps
1.	Click on Task 
2.	Choose Manage Negotiations 
3.	Search and open the RFQ 
4.	Click Actions Click Manage Click Award Negotiation



5.



User can perform partially award by choose at line level.

6.

7.

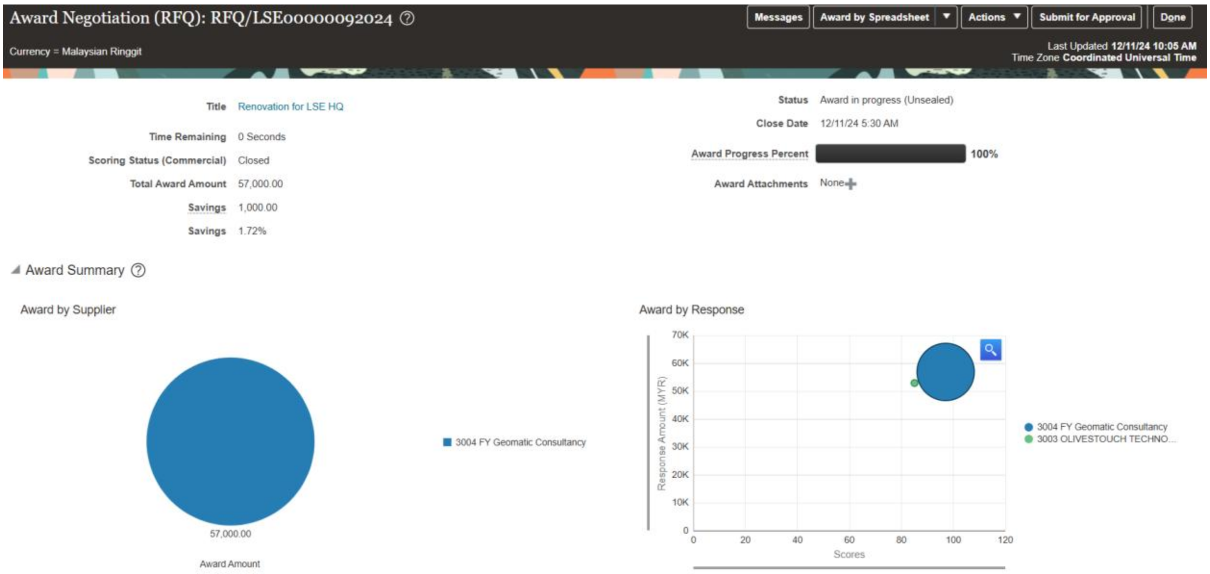

Compare and Award
Actions View Format Freeze Detach Wrap
Response Elements
Negotiation Target
FY Geomatic Consultancy
Award Decision
Award Notes
Supplier Information
10748
Supplier Site
MAIN
Supplier Contact
YUSOF, MUHAMMAD FUAD
Business Relationship
Spend Authorized
Response Information
Shortlist
Response
3004
Response Amount
57,000.00
Overall Rank
2
Savings
1,000.00
Current Value
58,000.00
Savings Percent
1.72%
Score
100.00
97.00

8. Save

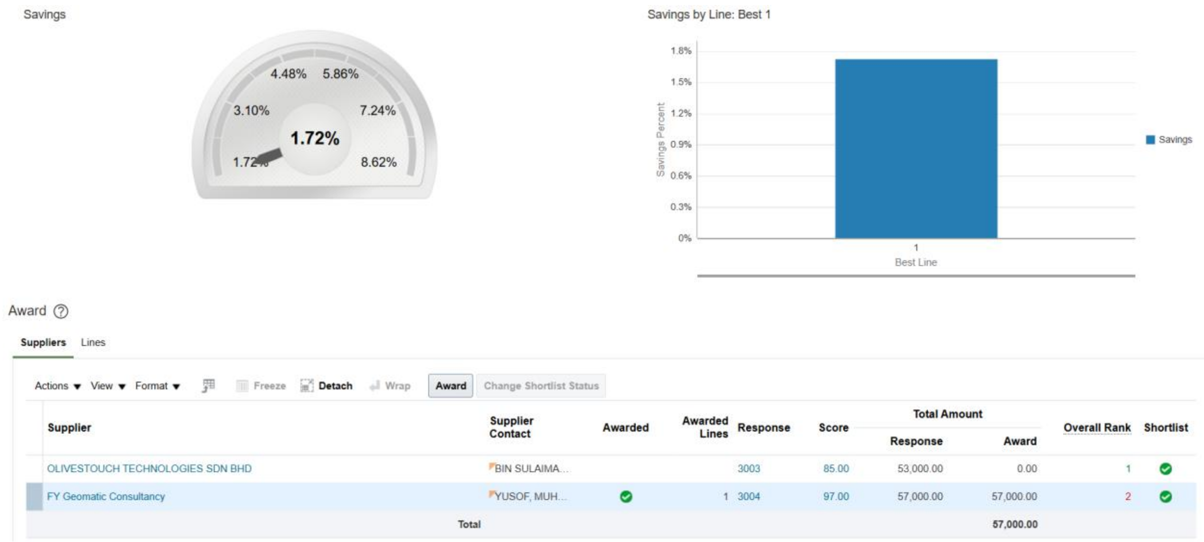

Award Responses (RFQ RFQ/LSE00000092024)
Messages
Save
Save and Close
Cancel
Currency = Malaysian Ringgit
Last Saved 12/11/24 10:03 AM
Title
Renovation for LSE HQ
Responses 2
Shortlisted 2
Status
Award in progress (Unsealed)
Close Date
12/11/24 5:30 AM
Award Analysis
Requirement Section Scores
Score
100
80
60
40
20
0
Company
Financial
3004 FY Geomatic Consultancy


Compare and Award
Actions View Format Freeze Detach Wrap
Response Elements
Negotiation Target
FY Geomatic Consultancy
Award Decision
Award Notes
Supplier Information
10748
Supplier Site
MAIN
Supplier Contact
YUSOF, MUHAMMAD FUAD
Business Relationship
Spend Authorized
Response Information
Shortlist
Response
3004
Response Amount
57,000.00
Overall Rank
2
Savings
1,000.00
Current Value
58,000.00
Savings Percent
1.72%
Score
100.00
97.00

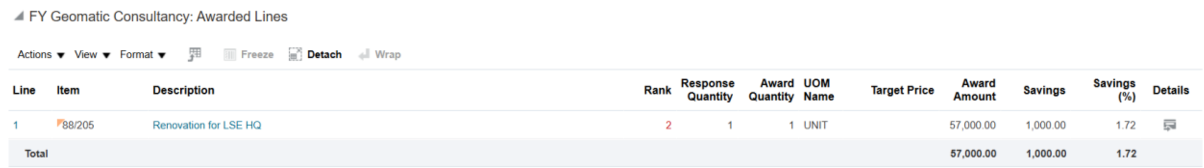
9.



10.



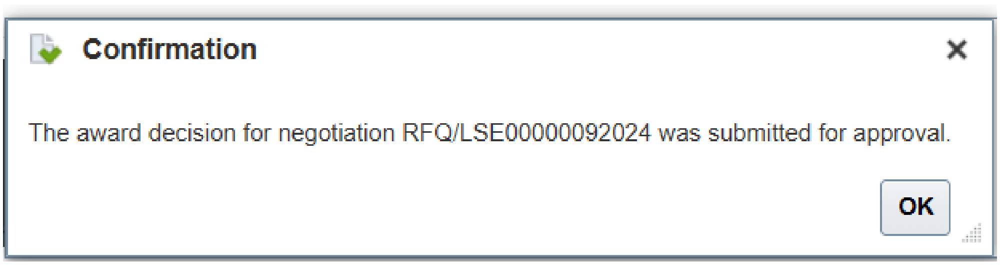
11.



12.

Click Submit for Approval

13.



	Click OK The award will go for approval processes.

Table 14: Award Process

5.2 Award Approval
*by HOD SCM

Click the Notifications (Bell icon) at the top right of the page.

Systems Notifications

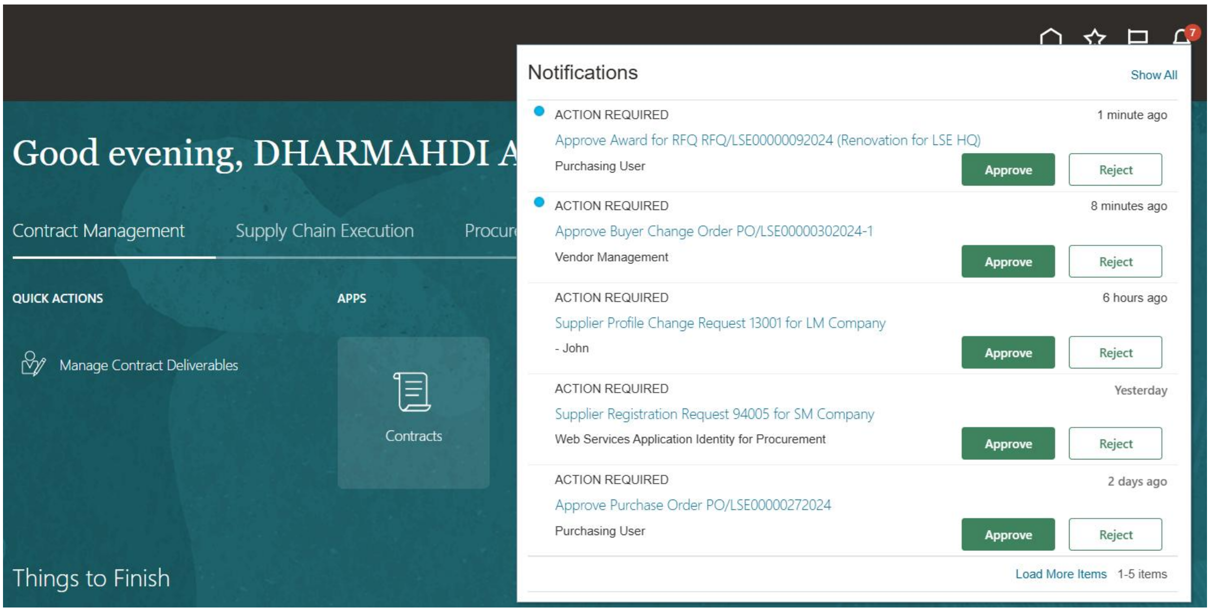
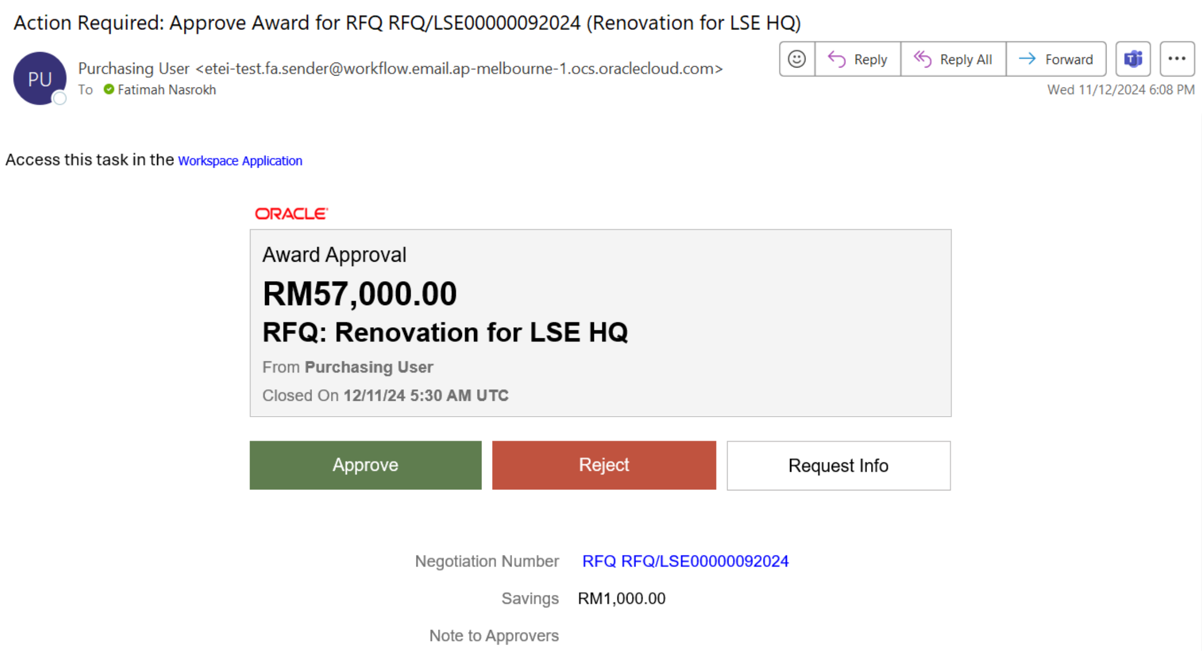


Figure 12: Approver System Notification Award

Email Notifications



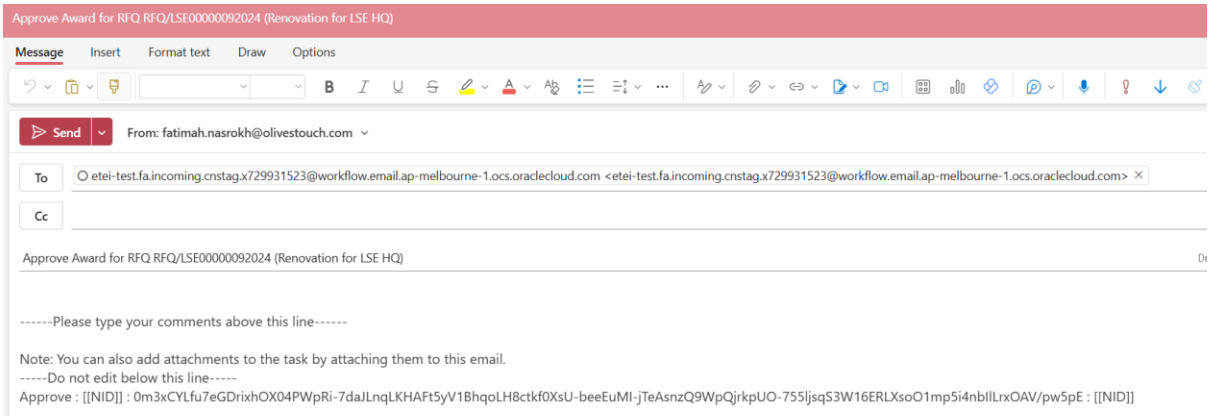


Figure 13: Approver Email Notifications Award

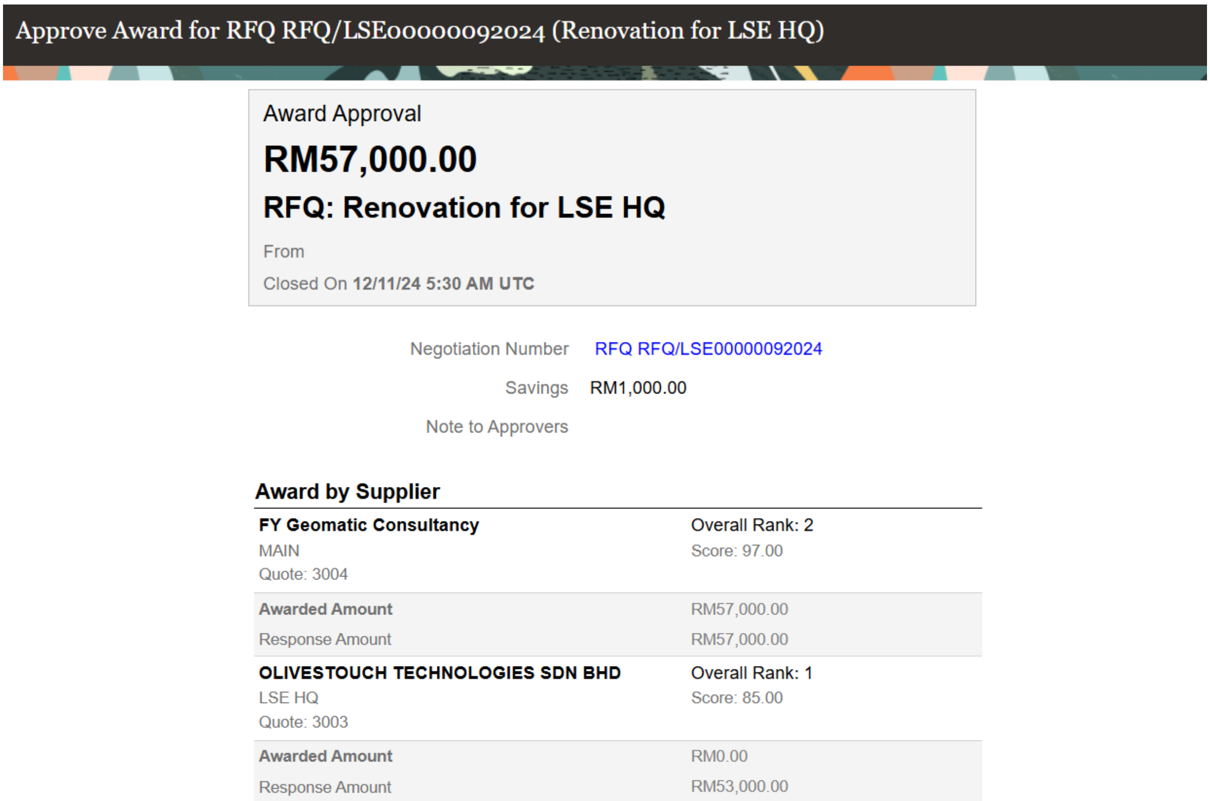
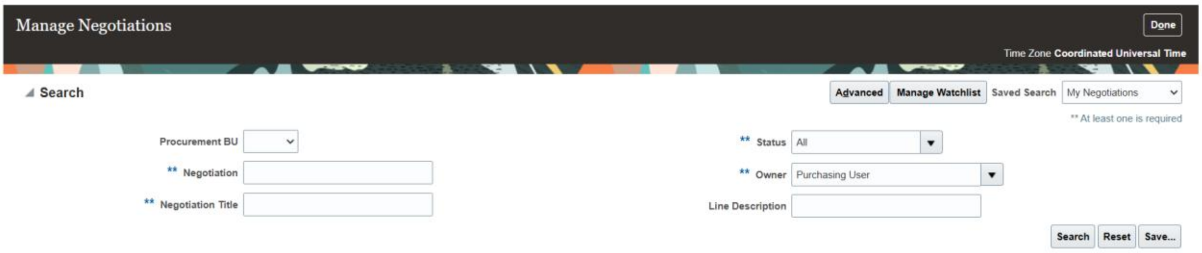
<table>
<tr><th>No.</th><th>Steps</th></tr>
<tr><td>1.</td><td>Approver can review detail of the Award Decision before approve.

</td></tr>
<tr><td>2.</td><td>Click Approve or Reject</td></tr>
</table>

Table 15: Award Approval Notification

5.3 Complete Award

No.	Steps
14.	Click on Task 
15.	Choose Manage Negotiations 
16.	Search and open the RFQ 
17.	Click Actions Click Manage Click Complete Award

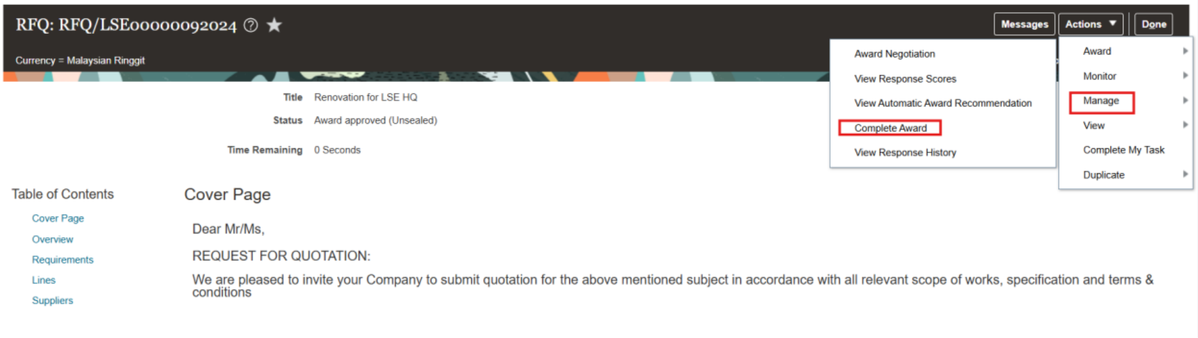
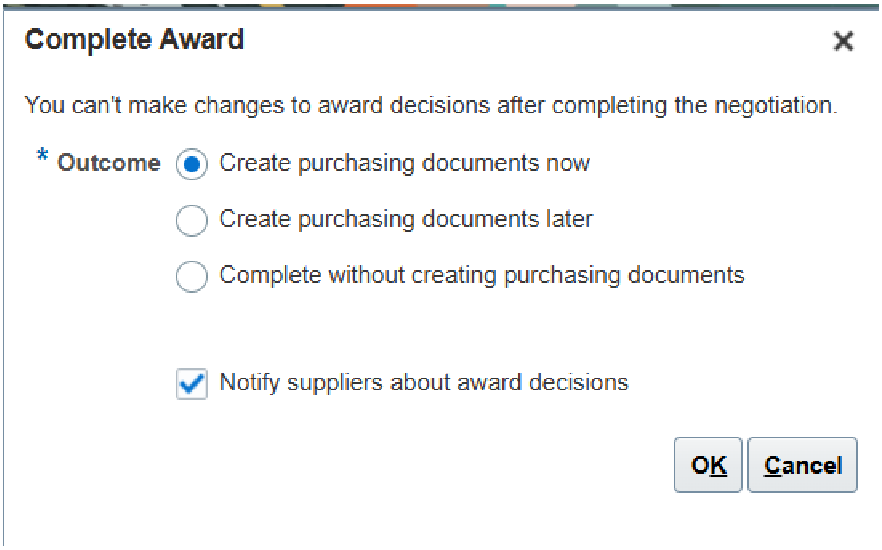
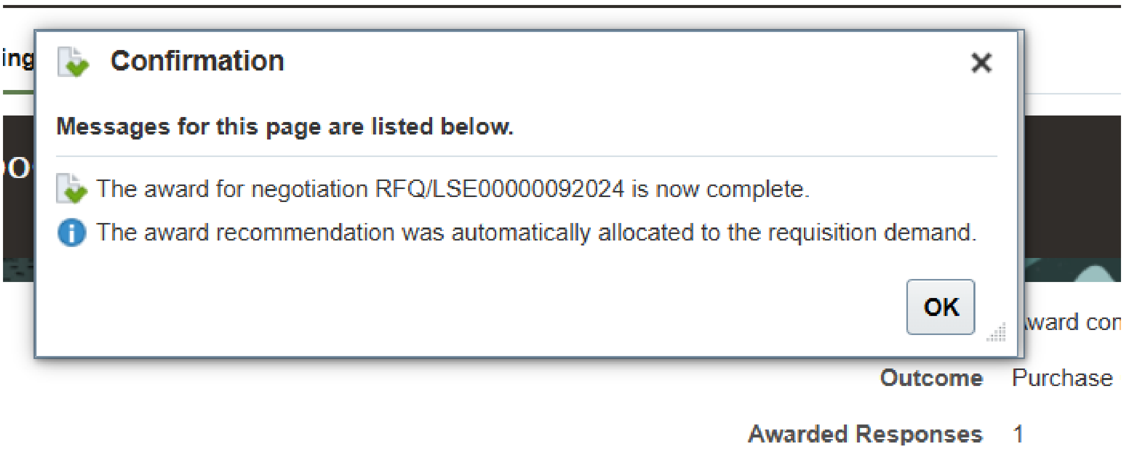
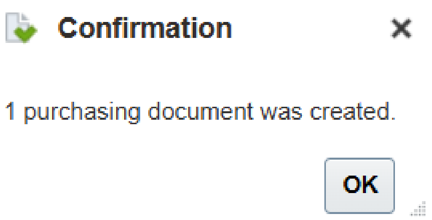
<table>
<tr><td></td><td>
</td></tr>
<tr><td>18.</td><td>
</td></tr>
<tr><td>19.</td><td>
</td></tr>
<tr><td>20.</td><td>
</td></tr>
<tr><td>21.</td><td>
</td></tr>
</table>

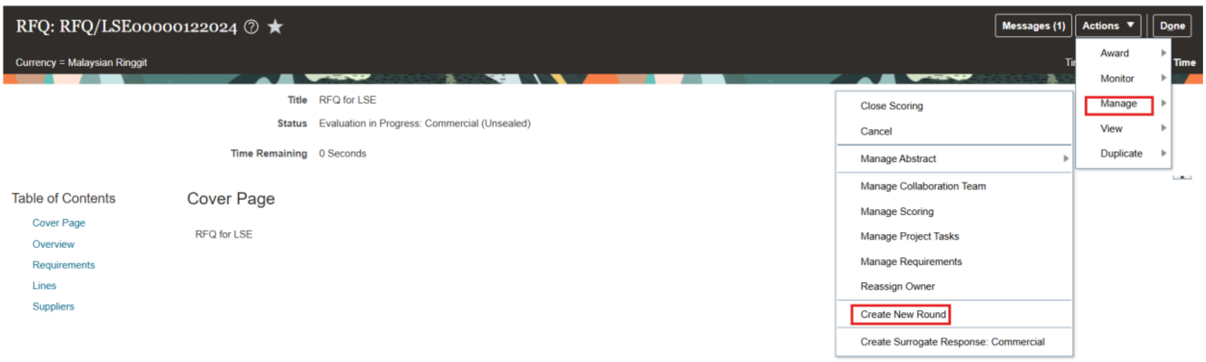
Table 16: Complete Award

6 NEW ROUND RFQ

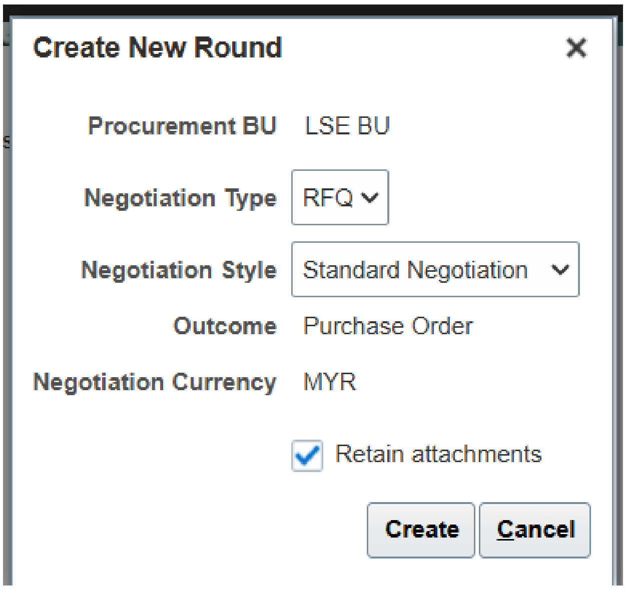
6.1 Create new round RFQ

No.	Work Area	Navigation
1.	Procurement	Negotiations

Table 17: Navigation

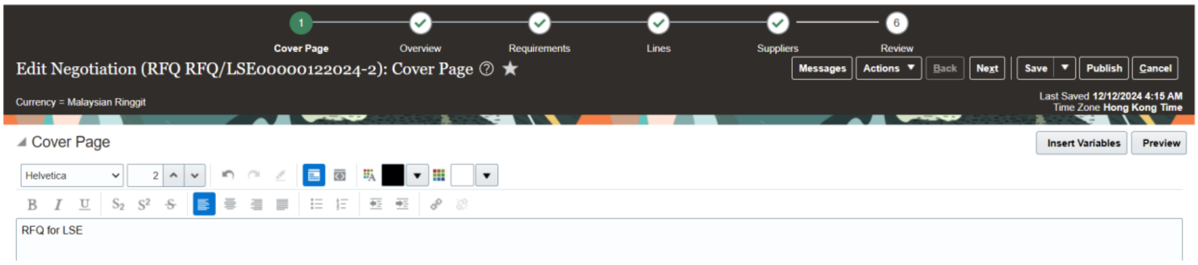
No.	Steps
1.	Click on Task 
2.	Choose Manage Negotiations 
3.	

4.

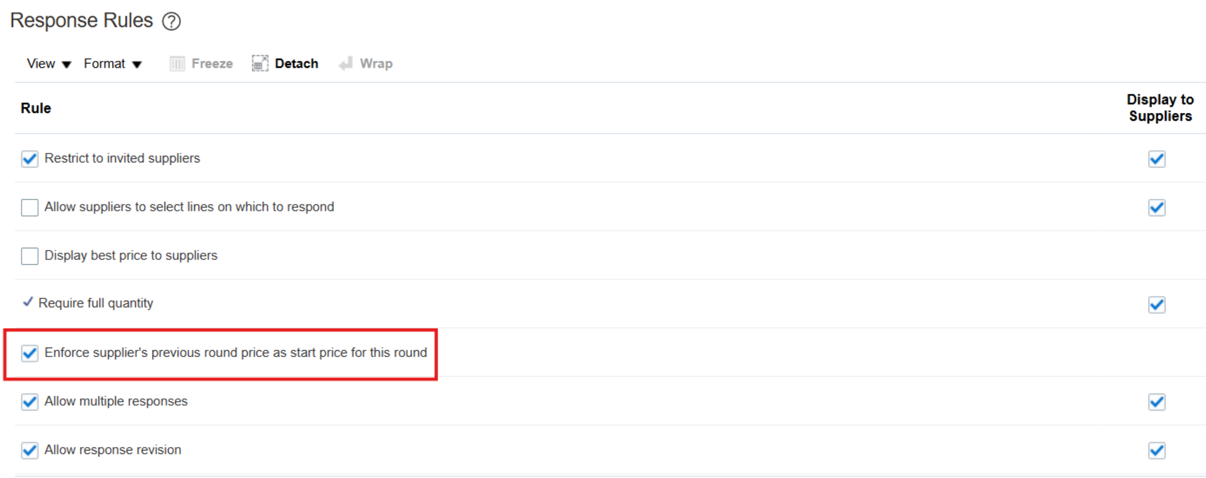


5.

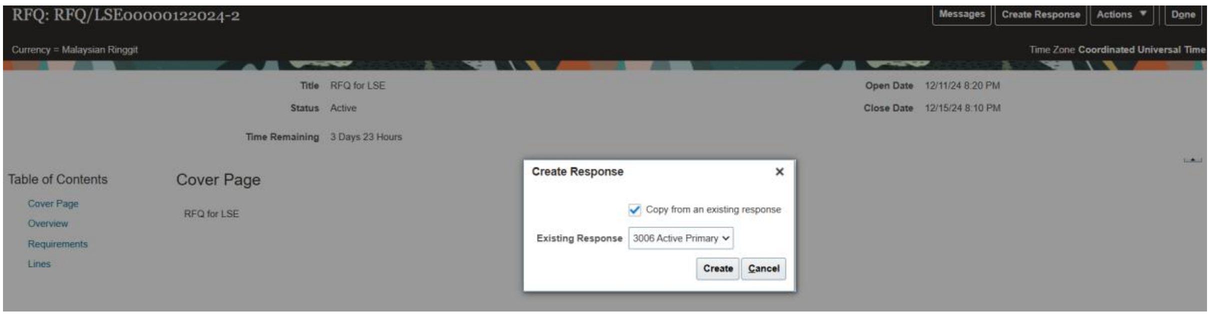
RFQ number will be generated from initial with revision.



6.



7.



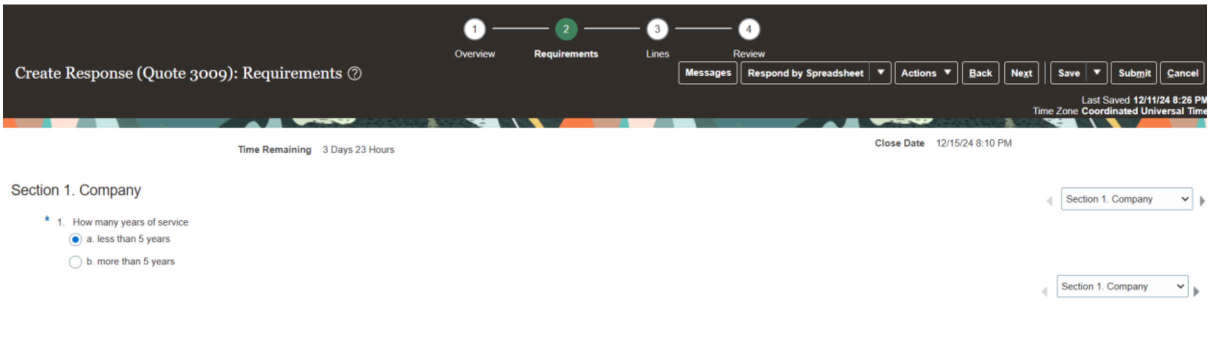
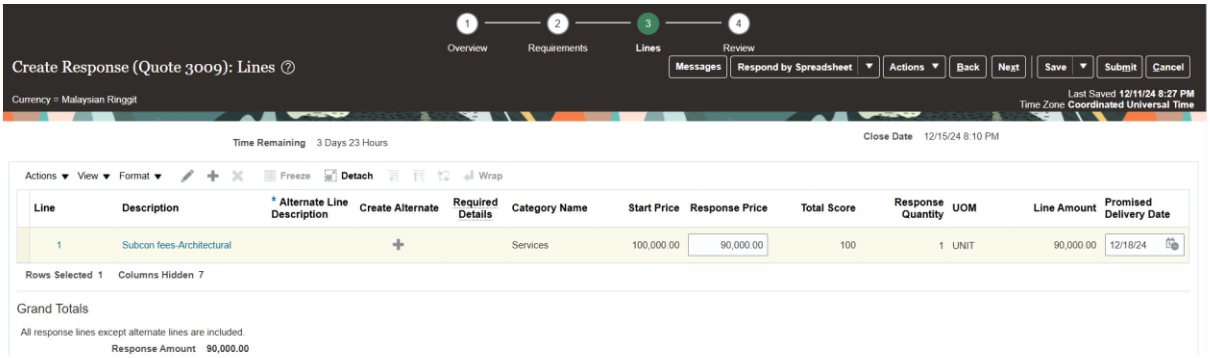
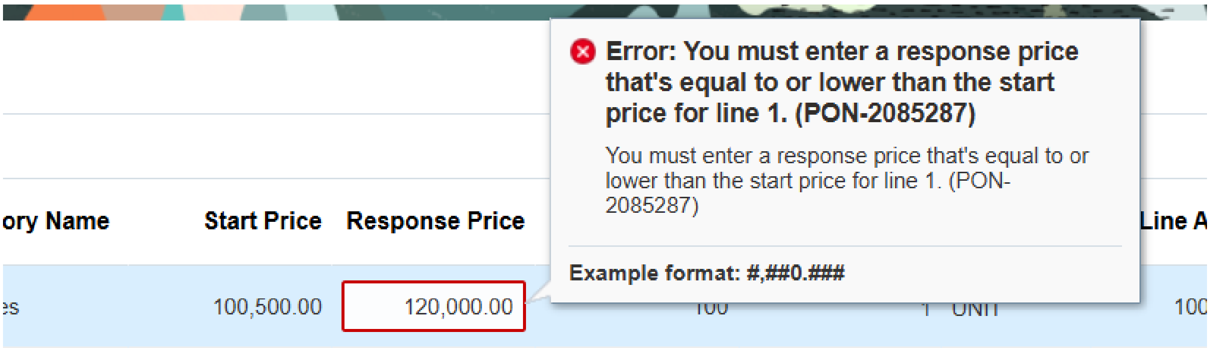
8.	Information will be carried from previous response. 
9.	
10.	Click Submit button 
11.	System will prompt error if supplier put the response price lower than the start price. 

Table 18: New Round RFQ

7 SURROGATE RESPOND

7.1 Create Surrogate Respond

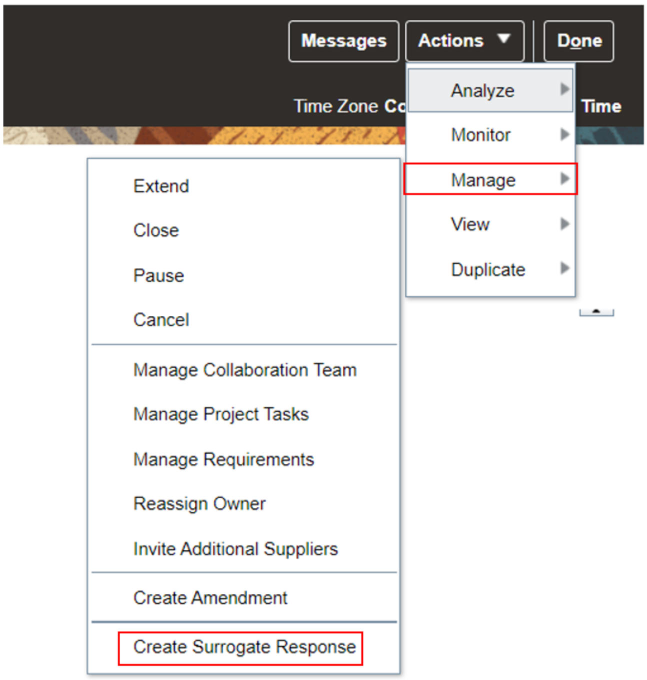
No.	Work Area	Navigation
1.	Procurement	Negotiations

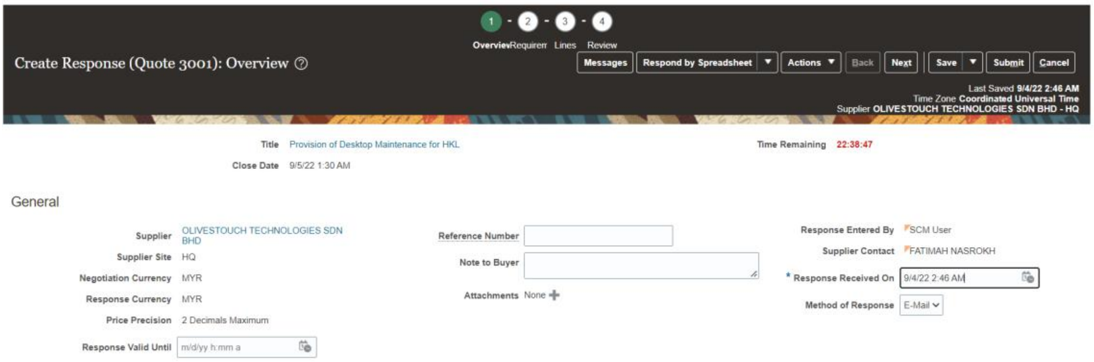
Table 19: Navigation

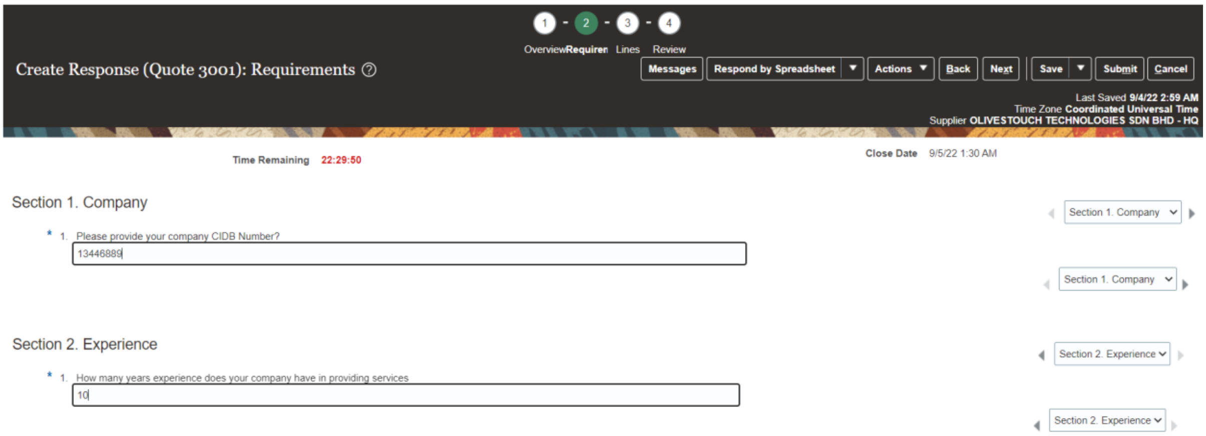
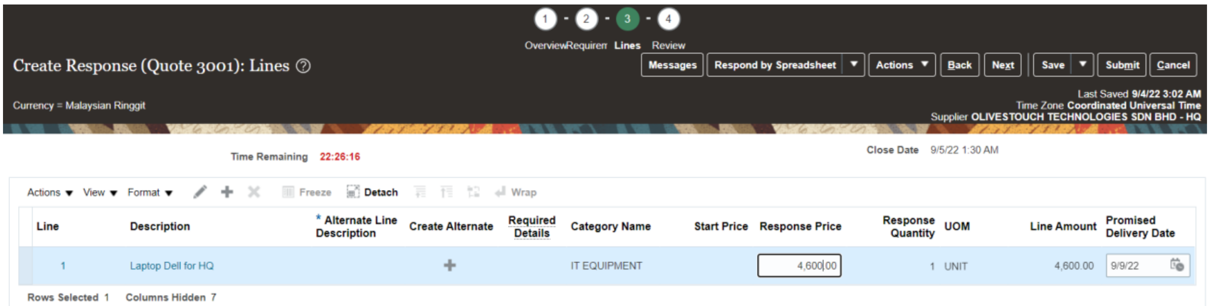
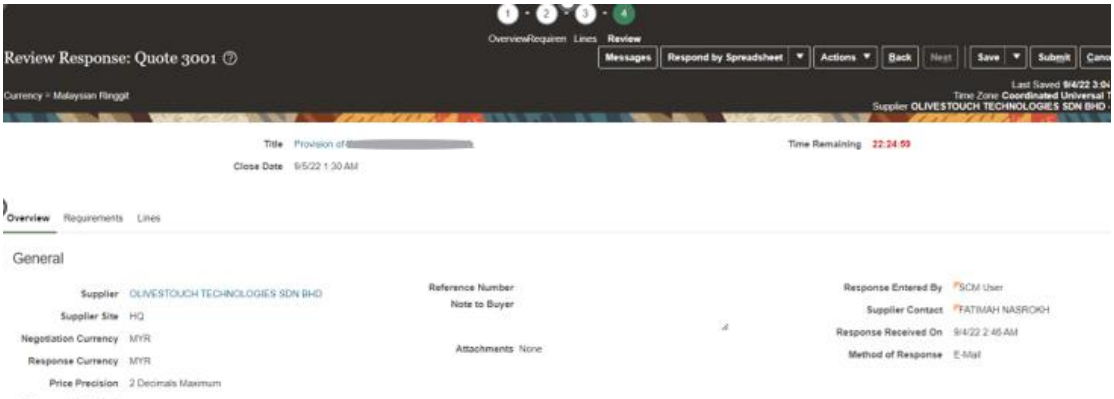
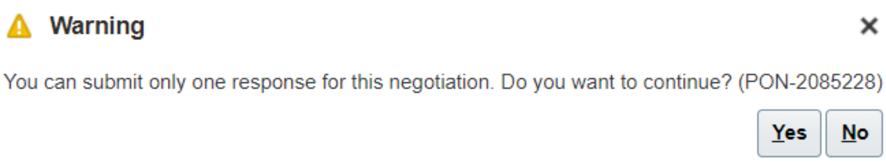
A surrogate response is a negotiation response that you enter on behalf of a supplier company. This feature gives the buying organization the ability to capture responses from suppliers who are not able to directly enter their responses online.

*"old school" supplier yg tidak dapat hantar RFQ secara online ke Oracle, jadi buyer yg tolong enter respond dalam system.

No.	Steps
1.	Click on Task 
2.	Choose Manage Negotiations 
3.	Click Actions Click Manage Create Surrogate Response

<table>
<tr><td></td><td colspan="2">
</td></tr>
<tr><td>4.</td><td colspan="2">Enter Supplier Name and Supplier Contact
Click Create Button

</td></tr>
<tr><td>5.</td><td colspan="2">Enter Create Response Information

</td></tr>
<tr><td>6.</td><td>Response Received On</td><td>Enter Response Received On</td></tr>
<tr><td>7.</td><td colspan="2">Click Next Button</td></tr>
</table>

<table>
<tr><td>8.</td><td>Go to the section field

</td></tr>
<tr><td>9.</td><td>Click Next Button</td></tr>
<tr><td>10.</td><td>Enter Response Price

</td></tr>
<tr><td>11.</td><td>Click Next Button</td></tr>
<tr><td>12.</td><td>Review Response and Submit

</td></tr>
<tr><td>13.</td><td>

Click Yes Button</td></tr>
</table>

Table 20: Create Surrogate Respond

8 FREQUENTLY ASKED QUESTIONS/ SPECIFIC SCENARIOS

8.1 Scenarios related to attachment during RFQ

? **QUESTION**

LSE want to attach attachment during RFQ processes. For Example LSE Terms and Conditions.

1. Go to attachments if user want to add any attachment
2. Click ➕ icon
3. Please ensure to choose Category as **To Supplier**

End of Document