



Our Ref: EOI/TSD/M/AUTO/1/2018/006

03 Aug 2018

Dear Tenderers,

**RESPONSE TO TECHNICAL QUERIES NO. 004**

**for Expression of Interest (EOI)**

**TENDER REFERENCE NO. TEN/TSD/2018/001**

Agreement No. TSD 1/2018 (AAS)  
Information Technology (IT) Service on Design, Development and Maintenance  
for the BEAM Plus Assessment Automation System  
for the BEAM Society Limited (the "BSL")

With reference to the captioned EOI, we hereby respond to the technical queries as received from tenderers via details at **Annex A**.

2. If you have any query concerning the above submission, please write to the Procurement Division of the BSL by email or by post for any queries concerning this EOI exercise and its associated Response to Technical Queries as detailed below:

Procurement Division  
The BEAM Society Limited  
1/F, Jockey Club Environmental Building  
77 Tat Chee Avenue  
Kowloon Tong, Hong Kong SAR  
China

Tel: (852) 3610-5700  
Fax: (852) 3996-9108  
Email: [assessment\\_automation@beamsociety.org.hk](mailto:assessment_automation@beamsociety.org.hk)

Yours faithfully,

A handwritten signature in black ink, appearing to be 'C. S. Ho' with a stylized flourish at the end.

(Ir C. S. Ho)  
General Manager of the BSL

Encl.

cc.       The BSL Secretariat  
          The Automation Task Force of the BSL

## Response to Technical Queries

<b>Agreement No.</b>	TSD 1/2018 (AAS)
<b>Subject of Procurement</b>	Information Technology Service on Design, Development and Maintenance for the BEAM Plus Assessment Automation System for the BEAM Society Limited
<b>Submission Deadline</b>	12:00 noon on Friday, 10 August 2018

Item No.	Queries from Tenderers	Response from the BEAM Society Limited
1.	<p><u>With reference to Assignment Brief on Application and Project Input/Control Sub-system</u></p> <p>Page 13, para. 8. viii. “An online payment shall be initiated once all application fields are vetted;”</p> <p>The online payment is handled by this system or redirect to other application? If the online payment is handled by this system, what is the estimate amount of this?</p>	<p>The BSL does desire but is not yet firmly settled to use online interbank transfer which could either be an integral part of the Solution being sought, or in the form of an online payment service provided by a third party (or third parties) depending on which configuration excels in terms of reliability, user-friendliness, security, and cost effectiveness.</p> <p>The BSL currently handles around 20 transactions monthly and you may refer to our NB fee scales to work out an estimate:</p> <p><a href="https://www.beamsociety.org.hk/en_news_1_details.php?id=309">https://www.beamsociety.org.hk/en_news_1_details.php?id=309</a></p> <p>Given the rather low transaction frequency as indicated above, bidders’ views and suggestions are welcome on whether online payment should be sought at this stage or at all.</p>

2.	<p><u>With reference to Assignment Brief on E-form associated Development and Implementation Sub-system</u></p> <p>Page 15, para. 15. iv. <i>“The System shall perform functional validation and cross reference check;”</i></p> <p>Please further explain the cross-reference check.</p>	<p>The functional validation and cross reference check include data field validation, time reference check, specific input validation among fields within or associated document or e-form.</p>
3.	<p><u>With reference to Assignment Brief on E-form associated Development and Implementation Sub-system</u></p> <p>Page 15, para. 15. v. <i>“The System shall allow Applicants to complete and store individual e-form with multiple instances;”</i></p> <p>Q: Please further explain the expectation on scenario of multiple instances.</p>	<p>A typical assessment spans over many years during which Applicants may store and modify their e-forms before submission.</p> <p>Any modification/deletion/addition of submitted e-forms must first be authorized by the BSL.</p> <p>It is crucial to keep a tally of any change/deletion/modification for record purposes and compliance checks.</p> <p>The Solution shall also identify and locate any such modification/deletion/addition.</p>
4.	<p><u>With reference to Assignment Brief on BAS associated assignment and project scheduling Sub-system</u></p> <p>Page 18, para. 22. x. <i>“BAS’s activities and performance shall be monitored closely by the System on behalf of the BSL through regular reports and ad-hoc online queries;”</i></p> <p>Please further explain the expectation level on the monitor level.</p>	<p>BAS’s performance shall be monitored closely for timely and quality assurance purposes. The Solution shall monitor real-time, among other things, the activity level, competency, timeliness and quality of report of BAS.</p> <p>BAS shall be evaluated on each assignment, so his/her ratings may be updated at irregular intervals. The Solution shall prompt the BSL once a BAS’s ratings drop below a certain threshold and suggest a set of predetermined actions.</p> <p>The Solution shall also support generating of “As-is” report at any time with historical data.</p>

5.	<p><u>With reference to Assignment Brief on Technical Review Committee (TRC) Review and Conclusion Sub-system</u></p> <p>Page 20, para. 31. “TRC shall be able to retrieve reports online to discuss/comment/approve Applicant’s project accordingly. Any conclusion drawn during the TRC meetings shall be logged in knowledge data dictionary system and audit system for future reference.”</p> <p>Q: Does the conclusion have any pre-defined format?</p>	<p>The BSL has yet to develop a standard format. But you may make reference to the BSL’s publication of Technical Circular Letter and FAQ available at: <a href="https://www.beamsociety.org.hk/en_beam_assessment_project_1.php">https://www.beamsociety.org.hk/en_beam_assessment_project_1.php</a></p>
6.	<p><u>With reference to Assignment Brief on Technical Review Committee (TRC) Review and Conclusion Sub-system</u></p> <p>Page 20, para. 32 i “Questions &amp; Observations Generator to encapsulate all project files, BAS discussions, assessment results, together with reference information from knowledge data dictionary;”</p> <p>Q: Please further explain the term, “Questions &amp; Observations Generator”. Does it mean that “Generator” collects all related documents from a case; it could automatically look up the reference information from Knowledge Data Dictionary?</p>	<p>Reports and statistical data shall be generated, but intelligent decisions and rulings are NOT necessary at this stage although it is conceived that some forms of intelligent checking should be developed in future (but NOT in this Solution).</p> <p>The functions of "Questions &amp; Observations Generator" are as follows: -</p> <ul style="list-style-type: none"> <li>- Project Assessment;</li> <li>- Reporting; and</li> <li>- Knowledge management.</li> </ul>
7.	<p><u>With reference to Assignment Brief on Technical Review Committee (TRC) Review and Conclusion Sub-system</u></p> <p>Page 20, para. 32. ii “TRC report shall be produced in specific format detailing assessment results with supporting documents;”</p> <p>Q: The supporting documents are provided</p>	<p>Supporting documents may include documents submitted by the Applicants in support of their claims or any precedent cases generated from previous rulings etc.</p> <p>Since these supporting documents are stored in the Solution, the BSL expects the Solution to summon those information and data as identified specifically or as a class of information according to users’ instructions.</p>

	by TRC findings or by the System.	
8.	<p><u>With reference to Assignment Brief on Audit and Knowledge Data Dictionary Sub-system</u></p> <p>Page 21, para. 35 “A <i>carefully crafted knowledge data dictionary for specific keywords shall not only drive consistency throughout the decision process, but also help to rectify results simultaneously when there is a change of policies or trends that may influence prior cases.</i> “</p> <p>Q: Clarify the expectation: When there is a change of policies or trends, should the Knowledge Data Dictionary easily adjust with the scoring system and rectify the results simultaneously?</p>	<p>All the knowledge items, interpretation or rules captured will be stored permanently and dated, indexed and tagged to specific projects/claims. Changes of the knowledge items, interpretation and rules will be implemented as new ones on the top of the old, rather than to supersede the old ones because there could be a time dimension governing the validity of knowledge items, interpretation and rules. In rare cases, some of these could be project-specific, hence having no generic applicability on other projects before or after the creation of the items, interpretation or rules. In a gist, all the items, interpretation and rules, once established as such, are valid, but the Solution must be capable of assisting BSL to categorize and produce reference. As regard the assessment results, all completed assessments will only be used for reference only and would not be updated once close although there could be rare occasion when supplement is needed to be annexed to completed results. It follows that the Solution must also enable BSL to leverage the data dictionary to assess any potential impacts in the industry should there be any updates of policy, building practice and new technology.</p>
9.	<p><u>With reference to Assignment Brief on Audit and Knowledge Data Dictionary Sub-system</u></p> <p>Page 21, para. 40. ii “A <i>content search function compatible with files of different formats, including but not limited to, e-forms, words, spreadsheet, PDF, CFR, email, etc.;</i> “</p> <p>Q: What is the format of CFR and which email system is the BSL using?</p>	<p>The requirement should be changed into BIM associated product neutral IFC format instead of CFR. BSL is currently using office 365 email system.</p>

**\*\*\*\*\*End of Response to Technical Queries \*\*\*\*\***