The Chinese University of Hong Kong
Implementation of Human Resources Management System (HRMS)
User Group Briefing Session
25th March 2015
Agenda

1. Project Background and Progress Update
   - Needs and Expected Benefits of HRMS
   - Vendor Evaluation and Selection
   - Survey Results
   - Project Scope, Schedule and Update

2. Absence Management

3. Questions & Answers Part I

4. Staff Cost Planning & e-Recruitment

5. ESS & MSS

6. Upcoming Events

7. Questions & Answers Part II
Project Necessity

- Existing systems cannot be enhanced or maintained
- New requirements on academic administration today
- Lots of manual work required, and will be more
Goal & Objectives of ERP*–HRMS

1. To capture more comprehensive employee data generated from data sources or workflows
2. To allow access to certain HR information or functionalities by Department/individual users
3. To enhance work efficiency by automating and streamlining operational procedures

*ERP – Enterprise Resources Planning
Other Expected Benefits of HRMS

- Implement a web-enabled HRMS system
- Adopt a new e-Recruitment solution
- Consolidate many existing HRMS systems
- Align with go-green initiatives via self-service
Which Coach?
# Vendor Evaluation and Selection (2014)

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Two tender proposals received (IBM/Oracle PeopleSoft and Compass/SAP)</td>
<td>April</td>
</tr>
<tr>
<td>Vendor Demonstrations &amp; Shortlisting</td>
<td>May – June</td>
</tr>
<tr>
<td>Consultation with Stakeholders viz. open forum/survey</td>
<td>July</td>
</tr>
<tr>
<td>Scoping Exercise with IBM and Compass (3-week)</td>
<td>August – September</td>
</tr>
<tr>
<td>Final SOW &amp; implementation schedule</td>
<td>October 2014</td>
</tr>
<tr>
<td>Recommendation approved by Tender Board, Project Management Team and RAC</td>
<td>November</td>
</tr>
<tr>
<td>Sign Contract</td>
<td>December</td>
</tr>
</tbody>
</table>
Where to go?
Survey Results

- Opening period: 8 – 25 July 2014
- 213 responses received

<table>
<thead>
<tr>
<th>Department/Unit</th>
<th>Number of Respondent</th>
<th>Number of Non-Teaching staff</th>
<th>Number of Teaching staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty/Academic Department</td>
<td>109 (51%)</td>
<td>89 (82%)</td>
<td>20 (18%)</td>
</tr>
<tr>
<td>Administrative Unit</td>
<td>67 (31%)</td>
<td>67 (100%)</td>
<td>- -</td>
</tr>
<tr>
<td>College</td>
<td>15 (7%)</td>
<td>15 (100%)</td>
<td>- -</td>
</tr>
<tr>
<td>Research Unit</td>
<td>13 (6%)</td>
<td>12 (92%)</td>
<td>1 (8%)</td>
</tr>
<tr>
<td>Others</td>
<td>9 (4%)</td>
<td>9 (100%)</td>
<td>- -</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>213</strong></td>
<td><strong>192 (90%)</strong></td>
<td><strong>21 (10%)</strong></td>
</tr>
</tbody>
</table>
## Survey Results – Employee Self-Service (ESS)

**Top Priority (213 respondents)**

<table>
<thead>
<tr>
<th>Function Area</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Leave Applications</strong></td>
<td></td>
</tr>
<tr>
<td>- Online submission of leave applications, e-alert on leave expiry</td>
<td>1 (25.4%)</td>
</tr>
<tr>
<td><strong>Staff Reviews</strong></td>
<td></td>
</tr>
<tr>
<td>- Online forms, uploading of supporting documents</td>
<td>2 (12.0%)</td>
</tr>
<tr>
<td><strong>Payroll Payments</strong></td>
<td></td>
</tr>
<tr>
<td>- Online salary advice, updating payroll bank account number online</td>
<td>3 (11.5%)</td>
</tr>
<tr>
<td><strong>Email Alert and Notification Service</strong></td>
<td></td>
</tr>
<tr>
<td>- Application result notification, action reminder</td>
<td>4 (9.2%)</td>
</tr>
</tbody>
</table>
Survey Results – Manager Self-Service (MSS)

Top Priority (52 respondents are Heads/Administrators)

<table>
<thead>
<tr>
<th>Function Area</th>
<th>Ranking</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Leave Applications</strong></td>
<td></td>
</tr>
<tr>
<td>- Flexible approval routing, team calendar</td>
<td>1 (25.6%)</td>
</tr>
<tr>
<td><strong>Workforce Planning</strong></td>
<td></td>
</tr>
<tr>
<td>- Access to staffing and financial information, scenario simulations</td>
<td>2 (19.2%)</td>
</tr>
<tr>
<td><strong>Staff Reviews</strong></td>
<td></td>
</tr>
<tr>
<td>- Allow generation of configurable reports or figures for review</td>
<td>3 (12.8%)</td>
</tr>
<tr>
<td><strong>Recruitment and Selection</strong></td>
<td></td>
</tr>
<tr>
<td>- Online submission of job advertisement requests, monitoring recruitment progress, screening/shortlisting and making offer</td>
<td>4 (10.3%)</td>
</tr>
</tbody>
</table>
Other Expected Challenges of HRMS ??
Project Organisation and Governance Structure

CUHK HRMS Steering Committee

CUHK HRMS Project Mgmt Group

CUHK HRMS Advisory Sub-Committee

CUHK HRMS Change Mgmt Group

CUHK HRMS Project Delivery Group

ITSC HRMS Mega Task Force

Infrastructure Team

Technical Team

9 Functional Workstreams
Project Scope

- Absence Management
- Base Benefits
- Enterprise Training
- Global Payroll
- Performance Review
- Recruitment
- Staff Cost Planning
- Workforce Administration
- ESS & MSS
High level Project Schedule

CUHK HRMS Implementation

|                | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sept | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep |
|----------------|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| **Project Management** |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |
|                |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |
| **Analyse and Detailed Design** |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |
|                |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |
| **Solution Build** |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |
|                |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |
| **Testing (SIT, UAT)** |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |
|                |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |
| **Data Conversion** |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |
|                |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |
| **3T and End User Training** |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |
|                |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |
| **Production Cutover and Support** |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |
|                |     |     |     |     |     |     |     |     |      |     |     |     |     |     |     |     |     |     |     |     |     |     |

**Remark:**
- SIT = System Integration Test
- UAT = User Acceptance Test
- 3T = Train-the-Trainer Training
- EUT = End User Training
- PIS = Post Implementation Support
Design

- High level solution blueprint almost completed
1. Project Background and Progress Update
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Absence Management

- **Self-Service**
  - Allow submission of leave applications through Employee Self-Service (ESS)
  - Allow approval of leave applications through Manager Self-Service (MSS)
  - Allow cancellation of the approved leave application through the system
Request Absence

Judy Chow
Executive Officer II

Instructions
Enter Start Date and Absence Name. Then complete the rest of the required fields before submitting or save for later your request.

Absence Detail

*Start Date 16/03/2015
End Date 24/03/2015
*Absence Name Annual Leave
Reason Select Absence Reason
Duration 7.00 Days

Calculate Duration Forecast Balance Attach Document

Comments
Requestor Comments Please approve my annual leave request.

Go To View Absence Request History View Absence Balances
Submit Save for Later
* Required Field
Absence Management

- **Types of leave to be applied through Self-Service**
  - Contractual Leave (i.e. Annual Leave, Long Leave, Vacation Leave)
  - Sick Leave
  - Maternity Leave
  - Training Leave (for non-teaching staff)
  - Academic Leave

- **Other types of leave to be applied outside the system, e.g.**
  - Paternity Leave, Adoption Leave, Bereavement Leave
  - Leave to Perform Public Duties
  - No-pay Leave
Absence Management

**Request Details**

**Judy Chow**  
Executive Officer II

**Instructions**
Review the details for this request and either approve, deny or push back for rework. You may also enter optional comments about each approval choice.

**Absence Detail**

- **Start Date**: 16/03/2015  
  AM / PM
- **End Date**: 24/03/2015  
  AM / PM
- **Absence Name**: Annual Leave
- **Reason**
- **Duration**: 7.00 Days

**Workflow**

**Status**: In Approval Process

**Comments**

- **Requestor Comments**: Please approve my annual leave request.
- **Approver Comments**: Have a nice holiday.

**Go To**
- View Absence Request History
- View Absence Balances

**Actions**
- Approve
- Deny
- Push Back

**Return to Absence Requests**
Absence Management

Streamlining of approval steps:

- Single level of approval within Department/Unit:
  - Immediate Supervisor ("Supervisor ID")
  - Management of leave = management of manpower
    - "Team Calendar" to facilitate internal coordination

- Second level of approval beyond Department/Unit:
  - Examples of 2\textsuperscript{nd} level approver
    - Maternity Leave – Personnel Office
    - Training Leave – Department Head
    - Academic Leave (exceeding 10 days) – Faculty Dean
## Team Calendar

### View Team Calendar

#### Employee Selection

#### View Criteria

- **Month**: 03 - March
- **Year**: 2015

### Monthly Team Calendar

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Code Title</th>
<th>Department</th>
<th>Sun 01</th>
<th>Mon 02</th>
<th>Tue 03</th>
<th>Wed 04</th>
<th>Thu 05</th>
<th>Fri 06</th>
<th>Sat 07</th>
</tr>
</thead>
<tbody>
<tr>
<td>[-] Hillary Lau</td>
<td>Executive Officer I</td>
<td>ENG</td>
<td>-</td>
<td>-/AL</td>
<td>AL</td>
<td>AL/-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Johnny Yu</td>
<td>Office Assistant</td>
<td>ENG</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>SICK</td>
<td>SICK</td>
<td>-</td>
</tr>
<tr>
<td>Judy Chow</td>
<td>Executive Officer II</td>
<td>ENG</td>
<td>-</td>
<td>AL/SICK</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

### Legend

- **Approved Absence**
- **Request Absence**
Absence Management

- **Future roles of Department Leave Administrators:**
  - Significantly reduced manual input chores
    - Except for:
      - Leave records of appointees (mainly junior staff members without ready assess to computer) not applying level through ESS
      - Types of leave to be applied outside the system
  - More focused on facilitating and advisory roles, e.g. assignment of supervisor ID
    - For examples:
      - Assignment of Supervisor ID
      - Monitoring of long pending applications
## Absence Management

**Administrator – Absence Event**

<table>
<thead>
<tr>
<th>Absence Event Entry</th>
<th>Forecast Messages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID 600008</td>
<td>Empl Record 0</td>
</tr>
<tr>
<td>Name Judy Chow</td>
<td></td>
</tr>
</tbody>
</table>

**Absence Event Details**

<table>
<thead>
<tr>
<th>From</th>
<th>Through</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>26/11/2014</td>
<td>26/03/2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Absence Events**

<table>
<thead>
<tr>
<th>Absence Take</th>
<th>Process Status</th>
<th>Forecast Value</th>
<th>*Begin Date</th>
<th>AM/PM</th>
<th>End Date</th>
<th>AM/PM</th>
<th>Partial Hours</th>
<th>*Process Action</th>
<th>Voided</th>
<th>Original Begin Date</th>
<th>Details</th>
<th>Entry Source</th>
<th>Workflow Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACAD</td>
<td></td>
<td></td>
<td>02/02/2015</td>
<td>AM</td>
<td>28/02/2015</td>
<td>PM</td>
<td></td>
<td>Normal</td>
<td></td>
<td>02/02/2015</td>
<td>Details</td>
<td>Employee Absence Request</td>
<td>Submitted</td>
</tr>
<tr>
<td>AL</td>
<td></td>
<td></td>
<td>16/03/2015</td>
<td>AM</td>
<td>26/03/2012</td>
<td>PM</td>
<td></td>
<td>Normal</td>
<td></td>
<td>16/03/2015</td>
<td>Details</td>
<td>Employee Absence Request</td>
<td>Approved</td>
</tr>
</tbody>
</table>
Absence Management

Department Administrators

<table>
<thead>
<tr>
<th>Set ID</th>
<th>Department</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CU001</td>
<td>AFO</td>
<td>Faculty Office of Arts</td>
</tr>
</tbody>
</table>

**Maintain Department Administrator**

| Effective Date | 01/01/2015 |

**Administrator**

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Name</th>
<th>Primary</th>
<th>Workforce</th>
<th>Payroll</th>
<th>Leave</th>
<th>Performance Review</th>
<th>Staff Cost</th>
<th>Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>100001</td>
<td>Jimmy Lam</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>100022</td>
<td>Bruce Lee</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Absence Management

- **Challenges ahead:**
  - Individual preference, e.g. email or worklist alert
  - Team Calendar
  - Academic Leave – more than records of absence
  - ???
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Questions & Answers – Part I
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Staff Cost Planning

- Staff Cost Simulation
  - A function for Department/Unit to estimate the staff cost before recruitment (for full-time/fractional-time appointments)
  - Based on employment terms
    - Rank
    - Salary
    - FTE
    - Expected Appointment Start/End Date
    - Benefits (e.g. housing benefits, contract-end gratuity)
  - Check Budget Availability through the Funding Model System and/or SAP Financial System (depending on the funding source)
Staff Cost Planning

- Funding Clearance
  - Department/Unit to seek funding clearance from Bursary electronically
  - After approval by Bursary
    - Staff cost will be reflected in the relevant account
    - Department/Unit will receive an approved Budget ID + PDF file
  - Department/Unit to make recommendations for appointment through the e-Recruitment system by using the PDF file
Standard New Hire through Taleo

New Hire through Taleo

Before Offer Acceptance

- Check Budget Availability

Principal Investigator / Budget Holder

- Candidate Selection
- Manage Requisition

Department Administrator

- Staff Costing & Funding Clearance
- Manage Offer

PO

- Generate LA
- Update LA Status

Candidate

- Job Application
- Sign Letter of Appointment

After Offer Acceptance

- Mark Ready for Hire
- Update Pay Group
- Auto-Benefit Enrollment

After Assume Duty

- Trigger Onboarding Process
- Convert LA Data to Manage Hire
- Convert to Employee
- Mark Hire
- Update Visa (Optional)
- Update Dependent
- Update Housing Benefit (Optional)

End
Sub-Process - Staff Costing and Funding Clearance

Staff Costing and Funding Clearance Process

- **SAP Financial System**
  - Check Non One-Line Budget Balances (Real Time)
  - Actual Staff Cost Commitment (Real Time)

- **Funding Model System**
  - Check One-Line Budget & Self Financed Programmes Balances (Real Time)
  - Notional/Actual Staff Cost Commitment (Real Time)

- **Department Admin**
  - Staff Costing
  - Funding Clearance?
    - No
    - Yes
      - Funding Approval/Clearance
        - No
          - Standard Process
          - Customized Process
          - Manual Process
          - 3rd Party System Process
        - Yes
Staff Cost Simulation

Requester Information
Name: Jimmy Lee
Faculty/Department/School/Unit: Faculty of Engineering
Date: 22/02/2015

Budget ID: $000001
Appointment Type: Reappointment
Employee ID: (for Existing Staff Only)
Expected Appointment Start: 01/07/2015
Expected Appointment End: 30/06/2017

Status: Simulation
Mode: Simulation

Job Code: E01
FTE: 1.0
Contract or Regular?: Contract

With Housing Benefits?: Yes
With CG?: Yes
With COLA?: Yes

Monthly Salary
** The Salary Plan and Grade will be defaulted from Job Code
Salary Plan: HMPX
Grade: C64
Step: 15
Monthly Salary in HKD: 45,155.00

Funding Source

<table>
<thead>
<tr>
<th>Effective Start</th>
<th>Cost Center</th>
<th>Project</th>
<th>Internal Order</th>
<th>Percentage</th>
<th>Override CG</th>
<th>Override Medical</th>
<th>Override Housing Benefits</th>
<th>Approval Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/07/2015</td>
<td>ENG</td>
<td>8901111</td>
<td></td>
<td>50%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>01/07/2015</td>
<td></td>
<td></td>
<td></td>
<td>40%</td>
<td>7109808</td>
<td>7109808</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Estimated Staff Cost
Estimated Full Actual Staff Cost (HKD): 1,281,768.56

Message Log

Save  Review Simulation  Copy for another Simulation  Proceed to Funding Clearance
# Staff Cost Simulation

## Requester Information

<table>
<thead>
<tr>
<th>Name</th>
<th>Jimmy Lee</th>
<th>Faculty/Department/School/Unit</th>
<th>Faculty of Engineering</th>
<th>Dates</th>
<th>22/02/2015</th>
</tr>
</thead>
</table>

## Staff Cost Break Down

<table>
<thead>
<tr>
<th>Staff Cost Type</th>
<th>Details</th>
<th>Full Actual Cost</th>
<th>Actual Cost Charging in On-line</th>
<th>Notional Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Salary</td>
<td>HKD 45,155.00</td>
<td>1,105,394.40</td>
<td>1,105,394.40</td>
<td></td>
</tr>
<tr>
<td>Package Description</td>
<td>Terms B</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MPF/OISS/Contract Gratuity</td>
<td>15%</td>
<td>160,809.16</td>
<td>160,809.16</td>
<td></td>
</tr>
<tr>
<td>Medical Cost</td>
<td>HKD 440/month</td>
<td>10,560.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housing Benefits (HKD)</td>
<td>HKD 0/month</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>1,281,763.56</td>
<td>1,282,203.56</td>
<td>1,272,960.00</td>
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</tbody>
</table>

## Monthly Salary

<table>
<thead>
<tr>
<th>Salary Plan</th>
<th>HMPX</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade</td>
<td>G64</td>
</tr>
<tr>
<td>Step</td>
<td>15</td>
</tr>
<tr>
<td>Monthly Salary in HKD</td>
<td>45,155.00</td>
</tr>
</tbody>
</table>

## Message Log

<table>
<thead>
<tr>
<th>COLA Adjustment</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merit Increment</td>
<td>Yes</td>
</tr>
</tbody>
</table>

## Funding Source

<table>
<thead>
<tr>
<th>Effective Start Date</th>
<th>Cost Center</th>
<th>Project</th>
<th>Internal Order</th>
<th>Amount (HKD)</th>
<th>Percentage</th>
<th>Override</th>
<th>Housing Benefit</th>
<th>Approval Status</th>
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<tbody>
<tr>
<td>01/07/2015</td>
<td>ENG</td>
<td>6901111</td>
<td>780,068.14</td>
<td>80%</td>
<td></td>
<td>7100888</td>
<td>7109999</td>
<td></td>
</tr>
<tr>
<td>01/07/2015</td>
<td>ENG</td>
<td>7108888</td>
<td>442,157.76</td>
<td>40%</td>
<td>7100888</td>
<td>7109999</td>
<td></td>
<td></td>
</tr>
<tr>
<td>01/07/2015</td>
<td>ENG</td>
<td>7109999</td>
<td>68,323.66</td>
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<td></td>
</tr>
<tr>
<td>01/07/2015</td>
<td>ENG</td>
<td>7109999</td>
<td>4,224.00</td>
<td></td>
<td></td>
<td>7109999</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

© 2015 IBM Corporation
Create Requisition

Select the organization-location-job field structure
To open a blank requisition file, click "Create" without entering any information.

Organization
The Chinese University of HK > The Chinese University of HK > School of Biomedical Sciences

Primary Location
Hong Kong S.A.R.

Job Field
Clerical > Executive Officer > Executive Officer
### 1. Requisition Structure

For Terms of Service AVA and equivalent posts, the closing date of applications is usually THREE Weeks after the posting date of the advertisement.

#### Identification

<table>
<thead>
<tr>
<th><strong>Requisition Title</strong></th>
<th><strong>Number of Openings</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Officer I</td>
<td><em>1</em></td>
</tr>
</tbody>
</table>

#### Structure

- **Organization**
  - **Company:** The Chinese University of HK
  - **Business Unit:** The Chinese University of HK
  - **Department:** School of Biomedical Sciences

- **Primary Location**
  - **Country:** Hong Kong S.A.R.

- **Job Field**
  - **Post Category:** Clerical
  - **Post:** Executive Officer
  - **Rank:** Executive Officer I

- **Department**
  - **SBSS - School of Biological Science**

- **Requisition Template**
  - **Executive Officer I**

- **Additional Details**
  - Requisition title
  - No. of openings
  - Source of funding for the advertised post
  - Contract Duration
  - Contract-end gratuity (Y/N)
  - Housing benefits (Y/N)
  - Prospect for renewal (Y/N)
  - Prospect for substantiation (Y/N)
  - Advertisement content
  - Advertising venue
  - Contact person
Request for Requisition Approval

Amend Approval

Message Details

From: Kenneth
To:
Date: Feb 9, 2015, 11:21:52 PM
Comments: please approve
For Requisition: Executive Officer I (1500000)

<table>
<thead>
<tr>
<th>Order</th>
<th>Approver</th>
<th>Decision</th>
<th>Date and Time</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Department (Bio. Science) Head</td>
<td>Approved</td>
<td>Feb 9, 2015, 11:22:00 PM</td>
<td>please approve</td>
</tr>
<tr>
<td>2</td>
<td>PO Hiring Team</td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Add the approvers to the list of collaborators defined for this requisition
Add the approvers to the list of my frequent collaborators
* Comments

Assign the next task to
To: Kenneth

Add Approvers

Done  Cancel
Candidate Selection

Selected Criteria

Assets Met (X) ≥ greater than or equal to 1

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Status Name</th>
<th>Icon</th>
<th>Status</th>
<th>Step</th>
<th>Requirements</th>
<th>Assets</th>
<th>Residence</th>
</tr>
</thead>
<tbody>
<tr>
<td>G. Dong (10000)</td>
<td>CU Interview</td>
<td>To be Scheduled</td>
<td>0 / 0</td>
<td>1 / 1</td>
<td>RU</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lau. Andy (10045)</td>
<td>Hire</td>
<td>To Be Hired</td>
<td>0 / 0</td>
<td>1 / 1</td>
<td>RU</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Schedule Interview

#### Executive Officer I (1500000U)

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Language Icon</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lau, Andy (10063)</td>
<td>en</td>
<td></td>
</tr>
<tr>
<td>Lau, Andy (10043)</td>
<td>en</td>
<td></td>
</tr>
<tr>
<td>Chan, Jacky (10091)</td>
<td>en</td>
<td></td>
</tr>
</tbody>
</table>

#### More Actions
- Cancel Legacy Onboarding Process...
- Cancel Onboarding (Transitions) New Hire Process...
- Cancel Onboarding (Transitions) Pre-Hire Process...
- Check for Duplicates...
- Compare...
- Create Candidate...
- Create Self-assigned Task...
- Delete Submission...
- Enter Grade...
- Restore Submission...
- Schedule an Interview...
- Send Correspondence...
- Start Legacy Onboarding Process...
- Start Onboarding (Transitions) New Hire Process...
- Start Onboarding (Transitions) Pre-Hire Process...

#### Schedule an Interview

**Interview Properties**

- **Subject:** Interview for the position of Executive Officer I at The Chinese University of Hong Kong (1500000U)
- **Organizer:** Given, Dong
- **Location:**
- **Start:** Feb 3, 2015, 4:30 PM
- **End:** Feb 3, 2015, 6:00 PM
- **Default Time Zone:** UTC +08:00, China Time, Beijing, Chongqing, Hong Kong, Urumqi
- **Reminder:** 15 minutes
Update Interview Status

Change Step and Status

<table>
<thead>
<tr>
<th>Current Step</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>CU Interview</td>
<td>To be Scheduled</td>
</tr>
</tbody>
</table>

Information

New Step

- CU Interview

New Status

- Passed Interviews*
- Under Consideration
- Passed Interviews*
- Rejected
- Has Declined

Comments

Share candidate
Send correspondence
Start Process
# Staff Cost and Funding Clearance

**Requester Information**

<table>
<thead>
<tr>
<th>Name:</th>
<th>Jimmy Lee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty/Department/School/Unit:</td>
<td>Faculty of Engineering</td>
</tr>
<tr>
<td>Date:</td>
<td>22/02/2015</td>
</tr>
<tr>
<td>Budget ID:</td>
<td>B000001</td>
</tr>
<tr>
<td>Appointment Type:</td>
<td>Reappointment</td>
</tr>
<tr>
<td>Employee ID:</td>
<td></td>
</tr>
<tr>
<td>Expected Appointment Start:</td>
<td>01/07/2015</td>
</tr>
<tr>
<td>Expected Appointment End:</td>
<td>30/06/2017</td>
</tr>
<tr>
<td>Contract or Regular?</td>
<td>Contract ☐ Regular ☑</td>
</tr>
<tr>
<td>With Housing Benefits?</td>
<td>Yes ☑ No ☐</td>
</tr>
<tr>
<td>With Merit Increment?</td>
<td>Yes ☑ No ☐</td>
</tr>
<tr>
<td>Mode:</td>
<td>Simulation ☐ Funding Clearance ☑</td>
</tr>
</tbody>
</table>

**Monthly Salary**

- **Salary Plan:** MMFX
- **Grade:** G54
- **Step:** 15
- **Monthly Salary in HKD:** 45,155.00

**Message Log**

- **Save**
- **Review Staff Cost Commitment**
- **Copy to Simulation**
- **Copy for another Funding Clearance**

**Estimated Staff Cost**

- Estimated Full Actual Staff Cost (HKD): 1,281,783.56
Create Offer

Yang, Di applied for requisition:

**Executive Officer I (15000003)**

<table>
<thead>
<tr>
<th>Top Section</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Draft</td>
<td></td>
</tr>
<tr>
<td>Extended</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Target Start Date</td>
<td>Feb 9, 2015</td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>Feb 9, 2015, 8:00 AM</td>
<td></td>
</tr>
<tr>
<td></td>
<td>[Tentative]</td>
<td></td>
</tr>
<tr>
<td>Expiration Date</td>
<td>Feb 11, 2015, 11:26 PM</td>
<td></td>
</tr>
<tr>
<td>Created on</td>
<td>Mar 4, 2015</td>
<td>Jan 18, 2015</td>
</tr>
<tr>
<td>Maximum Salary</td>
<td>40,000.00</td>
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</tr>
<tr>
<td>Budget ID</td>
<td>B000001</td>
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</table>

<table>
<thead>
<tr>
<th>General Terms</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Currency</td>
<td>Hong Kong Dollar (HKD)</td>
<td>Hong Kong Dollar (HKD)</td>
</tr>
</tbody>
</table>

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Create Offer (Add Attachment)

Add a File

Attachments

The attachment will be scanned to ensure it does not contain any viruses.

Select a file

B00001.pdf

Comments about the file (250)

Attach to

Offer

Done  Cancel
Extend Offer & Capture Offer Response

Extend Offer
Expiration Date: Feb 12, 2015, 5:46 PM
Start Date: Feb 9, 2015, 8:00 AM
Target Start Date: Feb 9, 2015

How do you want to extend this offer?
- [ ] Extend in writing
- [x] Extend verbally, on Feb 9, 2015
- [ ] Capture candidate response

Comments:
Extend offer

Capture Offer Response

How did the candidate respond to the offer?
- [x] The candidate accepted the offer
- [ ] The candidate wants to negotiate the offer
- [ ] The candidate refused the offer

When did the candidate accept the offer?
Accepted on (Event Date):
Feb 9, 2015

When will the candidate start working?
Start Date:
Feb 9, 2015, 8:00 AM
- [ ] Tentative

Do you want to start the transition process?
- [ ] Start Process

Comments:
Accept
Standard New Hire through Taleo

New Hire through Taleo

<table>
<thead>
<tr>
<th>Before Offer Acceptance</th>
<th>After Offer Acceptance</th>
<th>After Assume Duty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Budget Availability</td>
<td>Staff Costing &amp; Funding Clearance</td>
<td>Mark Hire</td>
</tr>
<tr>
<td>Candidate Selection</td>
<td></td>
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</tr>
<tr>
<td>Manage Requisition</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage Offer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generate LA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update LA Status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sign Letter of Appointment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Application</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Trigger Onboarding Process
Create User Account (System)
Update Visa (Optional)
Update Dependent
Update Housing Benefit (Optional)

End
## Mark Hire after Assume Duty

### Change Step and Status

<table>
<thead>
<tr>
<th>Current Step</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offer</td>
<td>Accepted</td>
</tr>
</tbody>
</table>

### Information

**New Step**

- Hire

**New Status**

- Hired - External*

* Reaching a status marked with an asterisk (*) completes the step

### Additional Information

**Start Date**

- Mar 9, 2015, 8:00 AM

**Event Date**

- [ ] Create a self-assigned task
- [ ] Send correspondence
- [ ] Start Process

**Comments**

- [ ]
Agenda

1. Project Background and Progress Update
   - Needs and Expected Benefits of HRMS
   - Vendor Evaluation and Selection
   - Survey Results
   - Project Scope, Schedule and Update

2. Absence Management

3. Questions & Answers Part I

4. Staff Cost Planning & e-Recruitment

5. ESS & MSS

6. Upcoming Events

7. Questions & Answers Part II
Functions include:

<table>
<thead>
<tr>
<th>Phase</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>- Personal Information Summary (e.g. personal, job and benefit information)</td>
</tr>
<tr>
<td></td>
<td>- Leave Application</td>
</tr>
<tr>
<td></td>
<td>- Medical Reimbursement Records</td>
</tr>
<tr>
<td></td>
<td>- Payslip</td>
</tr>
<tr>
<td></td>
<td>- Updating of Bank Account</td>
</tr>
<tr>
<td>2</td>
<td>- Performance Review for Non-Teaching Staff (full PRD report for Terms A only)</td>
</tr>
<tr>
<td></td>
<td>- Training Application</td>
</tr>
<tr>
<td>Subsequent Enhancement</td>
<td>- Updating of Personal Particulars (phone no., address and emergency contact)</td>
</tr>
</tbody>
</table>
Manager Self-Service (MSS)

Functions include:

<table>
<thead>
<tr>
<th>Phase</th>
<th>Functions</th>
</tr>
</thead>
</table>
| 1     | - Employee Profile  
|       | - Leave Approval  
|       | - Managing Delegation |
| 2     | - Performance Review for Non-Teaching Staff (full PRD report for Terms A only)  
|       | - Training Approval |
Agenda

1. Project Background and Progress Update
   - Needs and Expected Benefits of HRMS
   - Vendor Evaluation and Selection
   - Survey Results
   - Project Scope, Schedule and Update

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4. Staff Cost Planning & E-recruitment

5. ESS & MSS

6. Upcoming Events

7. Questions & Answers Part II
## Upcoming Events

- HRMS Newsletter
- HRMS Website

Your views and suggestions are always welcome:-

| Telephone       | Mrs. Agnes Kan (ext. 39519)  
                 | Mr. Eric Chan (ext. 39895)   |
|-----------------|-----------------------------|
| email           | hrms@itsc.cuhk.edu.hk       |
Agenda

1. Project Background and Progress Update
   - Needs and Expected Benefits of HRMS
   - Vendor Evaluation and Selection
   - Survey Results
   - Project Scope, Schedule and Update

2. Absence Management

3. Questions & Answers Part I

4. Staff Cost Planning & E-recruitment

5. ESS & MSS

6. Upcoming Events

7. Questions & Answers Part II
Questions & Answers - Part II
The End

Thank You!