

Personnel Information – 2.1 New Hire



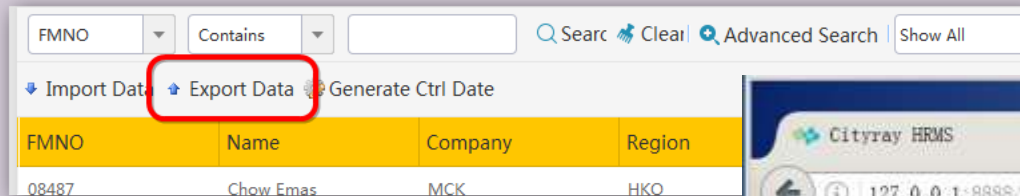
Input New Hire Information Process

Batch Input by excel file with fixed format

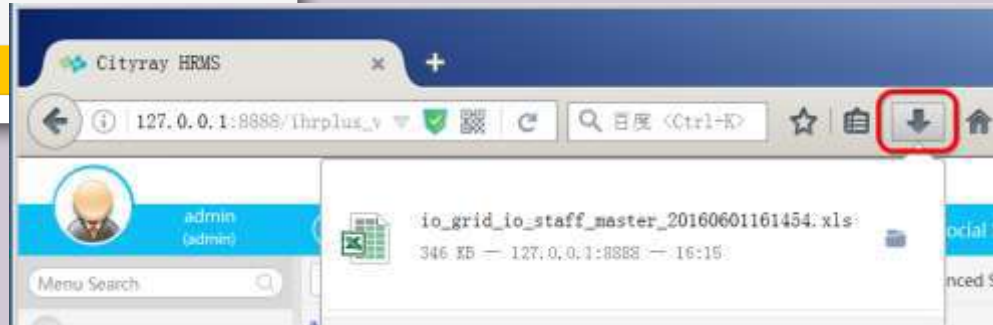
1) Export excel format from system

- Click “Export Data”
- Download and open the exported excel.

(The format needs to be exported from system only at the first time. The data can be edited directly in the excel and imported into system since then.)



FMNO	Name	Company	Region
08487	Chow Emas	MCK	HKO



Personnel Information – 2.1 New Hire

Line1&2 must be retain

Line1 FMNO	Name	Group	Tax Office	Department	GOC	Position	Job Name	PCAT	Location
Line2 employee no	employee name	company	region	sub company	division	position code	position name	category	working lo
08487	Chow Emas	MCK	HKO	HKE	Others	31002	Senior Implementation Facilitator	CSSA	HKO

2) Input new hire information under excel format.

- Line1 – Field names defined by McKinsey ePeople
- Line2 – Corresponding field names defined by Cityray (no use here but do not delete)
- Line3 – An example
- **When filling in information , please delete line3**

Note:

- Only new hires' information can be imported in this function. Once done, you can't change anything through this function.
- Some fields are mandatory.
- Save the excel as template. When importing new hire's information, use this template.
- Line1&2 cannot be deleted or changed.

Personnel Information 2.1 – New Hire

FMNO	Name	Company	Region	Sub Company	Division
08487	Chow Emas	MCK	HKO	HKE	Others

3) Click “Import Data”

Select the “File Path”, tick “Has Header”, then click “Import”.

4) If it’s successfully imported

A pop-up window will show success message.

5) If it fails

Click “File Name” path. A file with all wrong data can be opened. Modify the data and import again.

Note: The imported data can be queried in the following process- Employee Master.

Import ID	Status	File Name	import date
1695	Success		2016-06-01 11:12:37
1691	Failed	io_phys_1_20160527135956.xls	2016-05-27 13:59:56
1690	Success		2016-05-26 16:45:37

Personnel Information – 2.2 Employee Master



- **Personnel Information** – Query active employee
- ****Personnel Information Batch Import** – Batch import to edit active employee's information by excel.

(Previous information will be overwritten without history record)

(Now cease this function temporarily)

- **Employee Contract** – Signed contract records
- **Generate Headcount*** - Calculate headcount monthly

Personnel Information – 2.2.1 Employee Master

- Query about active employee

The screenshot displays the 'Employee Master' interface. On the left, the 'Organization' pane shows a tree view with 'McKinsey Company' selected (indicated by a red box and the number 1). The main area, 'Staff Information', features a search bar with 'FMNO' selected as the filter condition (indicated by a red box and the number 2). Below the search bar is an 'Edit Employee' button (indicated by a red box and the number 3). A table of employee records is shown below, with the row for 'Fu Ryan' (FMNO 60079) highlighted (indicated by a red box and the number 3).

Organization Unit	FMNO	Name	Job Name	Tax Office	Department	GOC
McKinsey Company	60076	Lin Eugene	Senior Implementati...	HKO	HKE	OTHERS
SHA	60078	Dunn Alfred	Senior Implementati...	HKO	HKE	OTHERS
SHA	60079	Fu Ryan	Senior Implementati...	HKO	HKE	OTHERS
HKD	60085	Wang Xin	Senior Implementati...	HKO	HKE	OTHERS
BEI	60229	Lee Jeanne	Senior Implementati...	HKO	HKE	OTHERS
SHZ	60230	Leung Brenda	Senior Implementati...	HKO	HKE	OTHERS

- Choose organization. Employee records under this unit will show.
- Set “Filter Condition” to quick search employee
- Choose one record and click “Edit Employee” to check detail information

Personnel Information – 2.2.1 Employee Master

- Company

Employee information management

Organization **Company** Policy Personal Profile Payroll Movement

Previous Copy Employee Next Save

FINNO: 60076
Name: Lin Eugene
Position Code: 31086
Position Name: Senior Implementation Facil
GROUP: McKinsey Company
Tax Office: HKO
Department: HKE
GOC: OTHERS

Position Category: CSS CSS
PCAT Code: P
P/N: N P N
Employee Status: P
Contract terms: Permanent P Permanent
eLeave Approver: P
Latest Hire Date: 2007/08/31 Company: 8 Y 9 M 9 D
Service Date: 2007/08/31 Service Days Adj: 0 Group: 8 Y 9 M 9 D
Work Start Date: Work Start Days Adj: 0 Society: 0 Y 0 M 0 D
Rehire Date: Last Terminated on:
Probation Complete: Location: HKO HKO
Last Review Date: Email Address:
Next Review Date: Pay Advice Password:
Current Position Start: 2007/08/31

Company Policy Personal Spouse Cost Center Position Info Leave Record Payroll Move

Save

PCAT: 高管 高管
PCAT Code: 非管理职
P/N: 不定时
Employee Status:
Contract terms: Y
eLeave Approver: 0215
Date Join: 2010/06/24

Movement Form

Save

O Value: New Value: P
Effect Date: 2016/05/31
Code: P
Reason:

- Underlined Fields: Information can be updated directly. (See Left Pic)
- Double click underlined fields, and then input new value. Change effective date and code, then click “Save”.
- Once a new value is saved in underlined fields, whether it will overwrite the old records, it depends on the effective date.



This sign means you can choose from drop down menu.



For the date field, you can choose from drop down menu or input information using the format “YYYY-MM-DD” or “YYYY/MM/DD”

Personnel Information – 2.2.1 Employee Master

Personal

Employee information management

Organization < Company Policy Personal Spouse Cost Center Position Info Leave Record Payroll Moved >

Previous Copy Employee Next Save Help

EE No.: 0156	Title: Mr	Last Name: 郑
Employee Name: 郑永强	Official Name: Zheng Yongqiang	Chinese Name: 永强
Position Code: 10000001	ID Number: 33010319750318241	First Name:
Position Name: Vice President/副总经理	HK ID Number: ()	Gender: Male
COM: Cityray	Prefer Name: 双	Date of Birth: 1975/03/18
Region: President	Politic Status: 群众	Age: 41 2 14 Upload
SubCOM: Vice President3	AC Location: 上海	Nationality: 中国
	File Location: 离职	Mobile Phone: 13701647681
	Passport No.:	
	Place of Issue:	
	Work Permit	
	Marital Status: 单身	
	Personal Email:	
	Language:	

Personnel Information – 2.2.1 Employee Master

Payroll- Special Pay Period

Company Policy Personal Position Info Leave Record **Payroll** Movement Pr

Special Pay Period Payroll Result Detail Currency Issuing records Fixed Item Period

Add Edit Delete

FMNO	Pay Code	Pay Name	Start Date	End Date
60076	15100	Take Time	2016-03-01	2016-06-30

Add

Save

Special Pay Type by PayCode Define

Pay Terms: Hongkong Local[2016/05/01-2016/05/31]

4 Pay Code: 15700 Referral Bonus Pay

Start Date: 2016/01/01

End Date: 2016/06/30

Prorata Unit: Months

Amount: 36000

Remarks: Referral Bonus Pay Testing Case **5**

Pay Code

Pay Code: Greater or

Pay Name: Contains

Search

Pay Code	Pay Name
15100	Take Time
15200	Unpaid LOA
15300	SOB Pay
15400	Interest Free Loan Pay
15500	MBA Loan Application ...
15600	Educational Leave Pay
15700	Referral Bonus Pay

Page 1 of 1 | Displaying 1 - 7 of 7

- 1 Click "Payroll" and then
- 2 Click "Special Pay Period"
- 3 Click "Add" and then a window will pop up
- 4 Select types of "Special Pay Period"
- 5 Input related Information and then click "Save"

Personnel Information – 2.2.3 Employee Contract

- Employee Contract

Employee Contract Management

FMNO Contains [] Search Clear Advanced Search Show All

Contract

FMNO	Name	Job Name	Tax Office	Department	GOC	Sub_Deapar...
08487	Chow Emas	Senior Implementation Facilit...	HKO	HKE	OTHERS	
09178	Chu Tian-cho	Senior Implementation Facilit...	HKO	HKE	OTHERS	
131264	Elektra Qin	40001	SHA	SHA	FIN	

Personnel Information – 2.2.4 Generate Headcount*

- Headcount report can be generated.
- The report is based on the data on the date when closing current month payroll and posting to the next month

Personnel Information – 2.2.4 Generate Headcount*

- Example

Cityray Technology Limited									
AQUA_P05_HeadcountReport (P05) Example									
count_date:2016/08/01									
print_date:2016/06/08									
Area	Company	Department	last_month_HC	Joiner	Leaver	Move	current_month_HC	Different	percentage
Great China	Sub Total		135	0	0	0	135	0	0.00%
	SHA Office	Supporting	266				266		
		Marketing	68				68		
		Admin	5				5		
	Sub Total		339	0	0	0	339	0	0.00%
	HKO Office	Admin	66				66		
		Finance	133				133		
		Marketing	152				152		
		Sales	156				156		
		Supporting	200				200		
Sub Total		707	0	0	0	707	0	0.00%	
Sub Total		1181	0	0	0	1181	0	0.00%	

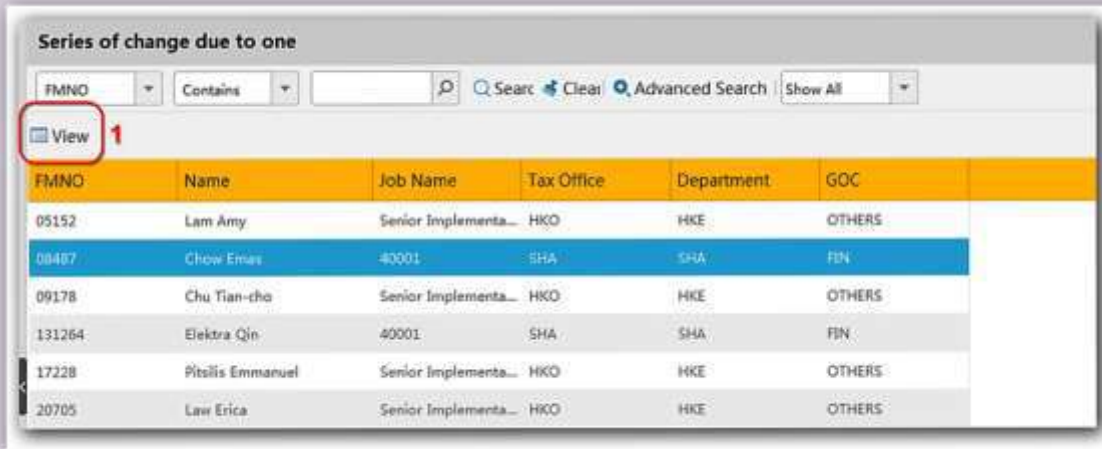
Personnel Information – 2.3 Change Status



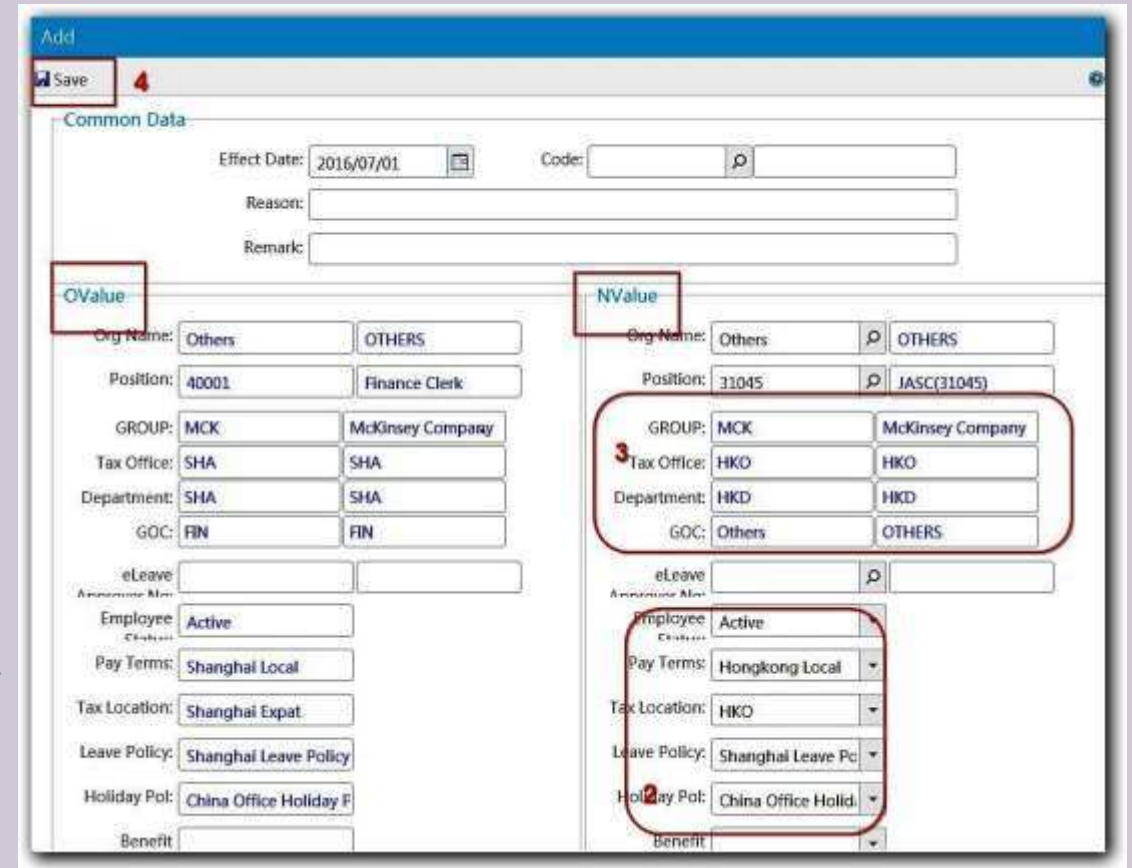
- **Series of Change due to One Change**
- **Single Change**
- **One Field Batch Replacement**

Personnel Information – 2.3.1 Series of Change due to One Change

2.3.1 Series of Change due to One Change



FMNO	Name	Job Name	Tax Office	Department	GOC
05152	Lam Amy	Senior Implementa...	HKO	HKE	OTHERS
08487	Chow Emma	40001	SHA	SHA	FIN
09178	Chu Tian-cho	Senior Implementa...	HKO	HKE	OTHERS
131264	Elektra Qin	40001	SHA	SHA	FIN
17228	Pitsilis Emmanuel	Senior Implementa...	HKO	HKE	OTHERS
20705	Law Erica	Senior Implementa...	HKO	HKE	OTHERS



Common Data

Effect Date: 2016/07/01 Code: []

Reason: []

Remark: []

OValue

Org Name: Others OTHERS

Position: 40001 Finance Clerk

GROUP: MCK McKinsey Company

Tax Office: SHA SHA

Department: SHA SHA

GOC: FIN FIN

eLeave: []

Employee Status: Active

Pay Terms: Shanghai Local

Tax Location: Shanghai Expat

Leave Policy: Shanghai Leave Policy

Holiday Pol: China Office Holiday F

Benefit: []

NValue

Org Name: Others OTHERS

Position: 31045 JASC(31045)

GROUP: MCK McKinsey Company

3 Tax Office: HKO HKO

Department: HKD HKD

GOC: Others OTHERS

eLeave: []

Employee Status: Active

Pay Terms: Hongkong Local

Tax Location: HKO

Leave Policy: Shanghai Leave Pc

4 Holiday Pol: China Office Holid

Benefit: []

- 1 Select one employee then and then click “View”
- 2 The “Ovalue” has the same information as that in “Nvalue”. When changing value in “Nvalue”, you only need to change the fields you want to change, leaving other fields unchanged.
- 3 Some fields can't be changed. But when you change a special field, series of changes will happen.
- 4 Save data

Personnel Information-2.3.1 Series of Change due to One

Org Salary Base Info Transfer

Header Contains Search Clear Advanced Search Show All

Back Add Edit Delete Edit MV Code View MV Org Detail

M Header	Header	Old Value	New Value	Effect Date	Effect Seq	Mcode na...	Reason	Remark
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**Example – Organization Change due to transfer

Add

Save 4

Choose Change Code

1

Effect Date: 2016/07/01 Code:

Reason:

Remark:

Change Org & Position

OValue	NValue
Org Name: Others OTHERS	Org Name: Others OTHERS
Position: 40001 Finance Clerk	Position: 31045 JASC(31045)
GROUP: MCK McKinsey Company	GROUP: MCK McKinsey Company
Tax Office: SHA SHA	Tax Office: HKO HKO
Department: SHA SHA	Department: HKD HKD
GOC: FIN FIN	GOC: Others OTHERS
eLeave: <input type="text"/>	eLeave: <input type="text" value="P"/>
Employee: Active	Employee: <input type="text"/>
Pay Terms: Shanghai Local	Pay Terms: Hongkong Local
Tax Location: Shanghai Expat	Tax Location: HKO
Leave Policy: Shanghai Leave Policy	Leave Policy: Hongkong Leave F
Holiday Pol: China Office Holiday F	Holiday Pol: Hongkong Holiday

2

3

Auto Change here

- ① Change code: choose type of change
- ② Change Org Name and Position in "Nvalue"
- ③ Auto change: these series of change will automatically happen after step2.
- ④ Save

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