**Scope of Work (SoW) for the provision of Resource Management System (RMS) Solution**

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1. **Introduction**

Insurance Authority (“IA”) invites qualified Tenderer to submit bids for the provision of Resources Management System (“RMS”) solution with comprehensive technical capabilities.

The solution shall streamline and transform IA’s operational processes, in particular Human Resources and Expense Claim. It aims to leverage the real-time information sharing and provide data integrity. The solution shall benefit IA by providing data duplication elimination, productivity enhancement, driving operational excellence with quality improvements, costs reduction, accurate and effective decision-making and controls.

The solution shall also bring value to IA by increasing speed and automating routine tasks, delivering meaningful and deeper insights, business intelligence and analytics, facilitating the agility and scalability of operating models.

1. **Functional Requirements**

The Tenderer shall cover the detailed solution, implementation service and plan to implement the RMS solution.

Functional Requirements include:

* Human Resources (HR) for 500 users
* Expense Claim for 500 users
	1. **HR Requirements:**

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| --- | --- | --- | --- | --- |
| **Module** | **Function** | **Sub-Function** | **Ref** | **Functional Specification** |
| General |  |  |  | The Solution shall include the Software as a Service (“SaaS”) and shall be a secure and reliable with helpdesk services in a single contact point. All IA related data which is processed and stored in the SAAS solution/system must be safely protected by the incumbent vendor. Please elaborate how the SAAS solution/system and the accompanying infrastructure protects the data asset from accidental and/or deliberate leakage. Please also elaborates the types of audit that are in place to monitor processes/procedures on safe handling of the data asset and the related security functions. |
| 1. Talent Acquisition | 1.1 Hiring Requisition |   | 1.1.1  | Allow Hiring Manager (or delegated staff) submit the Headcount Form on the system for hiring   |
| 1. Talent Acquisition | 1.1 Hiring Requisition |   | 1.1.2 | Recognise the approve flow base on the organisation structure, and show on the system |
| 1. Talent Acquisition | 1.1 Hiring Requisition |   | 1.1.3 | Ensure all approvers should have the access right to check the status of related Headcount Form only.  |
| 1. Talent Acquisition | 1.1 Hiring Requisition |   | 1.1.4 | Send automatic email notification to the approvers (or appointed persons) (for any update of the Headcount Form) (e.g. request raised, approve /reject, source of funding, approval)  |
| 1. Talent Acquisition | 1.1 Hiring Requisition |   | 1.1.5 | Send Reminder email to the approvers (e.g. C-Levels, TA) for approval (Allow to define the reminder time) |
| 1. Talent Acquisition | 1.1 Hiring Requisition |   | 1.1.6 | Allow all approvers to return / add feedback on Headcount Form to appointed parties if any information is missing / incomplete. |
| 1. Talent Acquisition | 1.1 Hiring Requisition |   | 1.1.7 | Be able to configure /update any changes of Headcount Form (e.g. job requisition/ requirements / title / hiring manager) by TA team and/or obtain appointed approvers' approval |
| 1. Talent Acquisition | 1.1 Hiring Requisition |   | 1.1.8 | Be able to Inactive/cancel the approved Headcount Form (with cancellation date) by inputting reason by hiring manager, appointed person or TA team at any stage (with indicator on the record showing active/inactive status) |
| 1. Talent Acquisition | 1.2. Job Posting |   | 1.2.1 | Send automatic email notification to the approver for approval |
| 1. Talent Acquisition | 1.2. Job Posting |   | 1.2.2 | Send reminder email notification to the approver (Allow to define the reminder time) |
| 1. Talent Acquisition | 1.3. Applicant (Job Seeker) |   | 1.3.1 | Job seekers can apply through other job boards and the application will go to the system |
| 1. Talent Acquisition | 1.3. Applicant (Job Seeker) |   | 1.3.2 | Able to apply for a job vacancy on mobile / digital devices easily. |
| 1. Talent Acquisition | 1.3. Applicant (Job Seeker) |   | 1.3.3 | Job seekers have an option not to create an account in the system for submitting applications. |
| 1. Talent Acquisition | 1.3. Applicant (Job Seeker) |   | 1.3.4 | Job seekers are required to opt out if they don’t want to receive any IA job or recruitment updates. |
| 1. Talent Acquisition | 1.3. Applicant (Job Seeker) |   | 1.3.5 | Able for job seeker to fill manually in Company CV template (e.g., submission channel, experience, education) |
| 1. Talent Acquisition | 1.3. Applicant (Job Seeker) |   | 1.3.6 | If the candidate chooses to upload the CV in word doc or PDF format (English, Traditional or Simplified Chinese, other languages), the system can recognise, extract, and map the content to the application form  |
| 1. Talent Acquisition | 1.3. Applicant (Job Seeker) |   | 1.3.7 | Able to create recruitment agencies account for multiple CVs submission. |
| 1. Talent Acquisition | 1.4. Recruitment Process | 1.4.1 Multiple Application | 1.4.1.1 | System can recognise any repeated or duplicated applications for the same opening and notify HR and TA (Same full name applying the same job post within a certain period of time) |
| 1. Talent Acquisition | 1.4. Recruitment Process | 1.4.1 Multiple Application | 1.4.1.2 | System can recognise multiple applications for various openings and notify the corresponding TA when candidate is being shortlisted for interview on either one of the opening |
| 1. Talent Acquisition | 1.4. Recruitment Process | 1.4.2 Pre-screening | 1.4.2.1 | Able to define filtering criteria based on answers submitted by candidates and effectively eliminate disqualified candidates, priorities/rank candidates’ application based on set criteria as early as in the application process. |
| 1. Talent Acquisition | 1.4. Recruitment Process | 1.4.2 Pre-screening | 1.4.2.2 | Be able to define screening criteria (e.g., computer skillsets) based on profile/CV data |
| 1. Talent Acquisition | 1.4. Recruitment Process | 1.4.3 Others | 1.4.3.1 | Able for TA team to modify / update information of Job seekers |
| 1. Talent Acquisition | 1.4. Recruitment Process | 1.4.3 Others | 1.4.3.2 | Allow hiding confidential information (e.g., contact details, salary history) and convert to PDF before sending to Hiring Manager |
| 1. Talent Acquisition | 1.4. Recruitment Process | 1.4.3 Others | 1.4.3.3 | Allow TA and hiring manager to view only their openings' recruitment status |
| 1. Talent Acquisition | 1.4. Recruitment Process | 1.4.3 Others | 1.4.3.4 | The system can indicate the recruitment status (e.g., Interviewed, shortlisted, rejected, offer extended) of each application |
| 1. Talent Acquisition | 1.4. Recruitment Process | 1.4.3 Others | 1.4.3.5 | Support CV sharing and forwarding applications within the TA team or to Hiring Managers |
| 1. Talent Acquisition | 1.4. Recruitment Process | 1.4.3 Others | 1.4.3.6 | Support downloading batches of applications for each hiring |
| 1. Talent Acquisition | 1.4. Recruitment Process | 1.4.3 Others | 1.4.3.7 | Automatic email notification for the approval process in the interview assessment form |
| 1. Talent Acquisition | 1.5. Database Search (Talent Pool) |   | 1.5.1 | Allow pulling potential candidates by searching the Talent Pool for keywords within CVs or profiles |
| 1. Talent Acquisition | 1.5. Database Search (Talent Pool) |   | 1.5.2 | Enable mass emailing to all Talent Pool candidates for recruitment campaigns (e.g., Career Talks) |
| 1. Talent Acquisition | 1.5. Database Search (Talent Pool) |   | 1.5.3 | Enable contacting suitable candidates who fit job requirements via email or other means |
| 1. Talent Acquisition | 1.5. Database Search (Talent Pool) |   | 1.5.4 | Support keyword search (Traditional/Simplified Chinese and English) in skills, experience, location, education, company, etc. |
| 1. Talent Acquisition | 1.6. Extended Offer & Salary Proposal |   | 1.6.1 | Manage job rejections (withdrawals, declined offers) with configurable notifications |
| 1. Talent Acquisition | 1.6. Extended Offer & Salary Proposal |   | 1.6.2 | In the salary proposal, it can generate the internal candidate profile in the same division for comparison e.g. no. of working experience, education and professional qualification and the name of the company |
| 1. Talent Acquisition | 1.6. Extended Offer & Salary Proposal |   | 1.6.3 | Maintain assignment date, staff grade, contract period (with ending reminders), supervisor, and offer details |
| 1. Talent Acquisition | 1.6. Extended Offer & Salary Proposal |   | 1.6.4 | Upload candidate-provided reference/supporting documents |
| 1. Talent Acquisition | 1.6. Extended Offer & Salary Proposal |   | 1.6.5 | Automatically notify candidates about missing supporting documents |
| 1. Talent Acquisition | 1.6. Extended Offer & Salary Proposal |   | 1.6.6 | Allow candidates to upload supporting documents for work visas |
| 1. Talent Acquisition | 1.7. On boarding |   | 1.7.1 | Be able to share onboard information |
| 1. Talent Acquisition | 1.7. On boarding |   | 1.7.2 | New joiner information will be reflected on the organisation chart automatically |
| 1. Talent Acquisition | 1.7. On boarding |   | 1.7.3 | Can log the background check or the reference check status |
| 1. Talent Acquisition | 1.8. Performance Reports (Recruitment Status, Measurement & Analysis) |   | 1.8.1 | Lead time (From Headcount to Verbal Offer) Analysis report |
| 1. Talent Acquisition | 1.8. Performance Reports (Recruitment Status, Measurement & Analysis) |   | 1.8.2 | Generate Budgeted Headcount vs filled position, hiring position, position to be on board and on hold positions Analysis report |
| 1. Talent Acquisition | 1.8. Performance Reports (Recruitment Status, Measurement & Analysis) |   | 1.8.3 | Generate and Analysis number of Leavers report |
| 1. Talent Acquisition | 1.8. Performance Reports (Recruitment Status, Measurement & Analysis) |   | 1.8.4 | Allow TA to define / customise various report formats and data analysis & forecasting |
| 1. Talent Acquisition | 1.8. Performance Reports (Recruitment Status, Measurement & Analysis) |   | 1.8.5 | All the reports should be available in selected formats, e.g. CSV, Excel and Word |
| 1. Talent Acquisition | 1.8. Performance Reports (Recruitment Status, Measurement & Analysis) |   | 1.8.6 | The system can generate all the application records (Date/Time/Lead Time/Education/Employment History) |
| 1. Talent Acquisition | 1.8. Performance Reports (Recruitment Status, Measurement & Analysis) |   | 1.8.7 | Support with functions / statistics to know how many incoming applications for the position or coming from which channels |
| 1. Talent Acquisition | 1.8. Performance Reports (Recruitment Status, Measurement & Analysis) |   | 1.8.8 | Recruitment report generation (i.e., number of job openings, number of applications received, number of interviews arranged, lead time, candidate’s profile/attachment |
| 1. Talent Acquisition | 1.8. Performance Reports (Recruitment Status, Measurement & Analysis) |   | 1.8.9 | Recruitment Requisition report on each hiring (i.e. who raised, approval progress, remarks / comment) |
| 1. Talent Acquisition | 1.9 Data Privacy |   | 1.9.1 | Must follow Person Data Privacy Policy. System will sort out and send out notification to HR if personal data of unsuccessful candidates are stored in system for 6 months or above (6 months counts from the date HR updated the status of candidate to "unsuccessful").  |
| 2. Human Resources Office | 2.1. Core Human Resource (“HR”) Functions |   | 2.1.1 | Provide comprehensive employee self-service platform and mobile app |
| 2. Human Resources Office | 2.1. Core Human Resource (“HR”) Functions |   | 2.1.2 | Have customisable dashboard functions for all users based on their role / authority, e.g. Turnover rate, Vacancy rate, etc |
| 2. Human Resources Office | 2.1. Core Human Resource (“HR”) Functions |   | 2.1.3 | Have e-filing function which can store documents linked to individual employee records e.g. contracts, appraisals, qualification certificates, supporting documents for leave application |
| 2. Human Resources Office | 2.1. Core Human Resource (“HR”) Functions |   | 2.1.4 | Allow access right of the system be defined by users and system is able to record all change of users’ profile and security settings |
| 2. Human Resources Office | 2.1. Core Human Resource (“HR”) Functions |   | 2.1.5 | Provide a user-friendly and comprehensive reporting tool to enable HR user to create, design and save report templates for further use |
| 2. Human Resources Office | 2.1. Core Human Resource (“HR”) Functions |   | 2.1.6 | Be scalable and extensible. Modules other than HR related functionalities & features (for example: Financial & accounting system, procurement system) must also be available for further consideration |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.1 Organisation Structure Setup | 2.2.1.1 | Employee category such as Permanent (non-contract end), Contract, Temporary, Part-time (can indicate e.g. 0.5 headcount), Intern), contract holding Perm H/C, on loan H/C |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.1 Organisation Structure Setup | 2.2.1.2 | Employee title category such as CEO, senior manager, manager, assistance manager, senior analyst, analyst, etc. |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.1 Organisation Structure Setup | 2.2.1.3 | New HR system can support at least 6 organisation structure layers (e.g. Company/Group/Division/Department/Section/Team/Project) and has the flexibility to adjust the layers hierarchy. |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.1 Organisation Structure Setup | 2.2.1.4 | Reporting line hierarchy (can support at least 3 to 4 levels approval, dual reporting lines)  |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.1 Organisation Structure Setup | 2.2.1.5 | Hierarchy setting for those holding acting positions / dual roles  |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.1 Organisation Structure Setup | 2.2.1.6 | Start date and end date of organisation structure |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.1 Organisation Structure Setup | 2.2.1.7 | Start date and end date of approval line |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.1 Organisation Structure Setup | 2.2.1.8 | Built-in organisation chart which allow users to edit/ view/ generate organisation chart |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.2 Master Table Configuration | 2.2.2.1 | Public/statutory holiday table of Hong Kong. Table can be linked with leave & attendance |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.2 Master Table Configuration | 2.2.2.2 | Retirement age setting & notification |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.2 Master Table Configuration | 2.2.2.3 | Master table capture grading / pay range with start date & obsolete date |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.2 Master Table Configuration | 2.2.2.4 | Leave table capture all leave rounding rule / calculation rule / entitlement according to employment ordinance and IA’s leave policy |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.3 Authorisation / assess right table configuration | 2.2.3.1 | Ability to set the limitation & grant assess right by modules / department / office / grade / data fields based on users' preference |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.3 Authorisation / assess right table configuration | 2.2.3.3 | Ability to create, edit and view vacancy date using different selection criteria (e.g. history, current, future, by different categories or by different cadre) |
| 2. Human Resources Office | 2.2. Organisation Management | 2.2.3 Authorisation / assess right table configuration | 2.2.3.4 | Ability for a system to link positions to recruiting functionality to ensure that a vacant position must exist before creating recruitment action |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.1 | Employee Name (Chinese Name, English Name, Surname, Given Name, preferred name, Alias) |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.2 | Indicator to close family members are IA's employee, relationship, Staff number of family members |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.3 | Home Address / Correspondence Address / All telephone number provided / e-mail address |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.4 | Date of Birth / Nationality / Place of Birth / Gender / Retirement date |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.5 | Marital Status / Date of marriage / Spouse information (Name, Date of Birth, Gender, HKID, Passport Number, other ID card number, issue place) Should keep all status changes with Start Date/ End Date |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.6 | Number of Child / Child(ren) information (Name, Date of Birth, Gender, HKID, Passport Number, other ID card number, Issue place) |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.7 | Emergency contact, Contact Name, Relationship |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.8 | Capture more than 1 Bank information with Start Date / End Date, with indicator which bank account is for salary payment / medical reimbursement |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.9 | Contract type, notice period, Contract start date / Contract end date |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.10 | Date Joined / Date Joined as Regular Staff/ Date of re-joined/ Date of re-appointment/ Position title (Both Chinese & English) / Year in position / Year in grade / Termination Date |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.11 | Working visa record with Start Date & Expiry date |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.12 | Education (pull down menu for the common school name, type of Education, studying subjects, other than those shown in pull down menu, free text can also be allowed) |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.13 | Language ability / Professional qualification /license information with start date & end date, type of qualification (pull down menu for common qualification. Free text is allowed if other than pull down menu, recognised by company or not) |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.14 | All past work experience records (start date, end date, position title, company name), total work experience, total relevant work experience |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.15 | External activities (to capture all memberships/ title of the organisation, with start date & end date) |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.16 | Information about secondment |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.17 | Store highly confidential records: Bankruptcy information, disciplinary history, warning letter issue date, description) |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.1 Employee Information | 2.3.1.18 | Capture historical information on performance evaluation (year of appraisal, rating, comment, variable payment % and actual amount, salary adjustment % and actual amount) |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.2. Employment Movement records | 2.3.2.1 | Have an audit trail for tracking all type of movement including existing and terminated staff e.g. New hiring, promotion, Reappointment, Internal transfer, change of grade, change of position, acting role, change of employment status, Special salary adjustment, annual salary adjustment, Resignation, Termination, Retirement, Completion of contract, Deceased. Audit trail logs for all system activities can be retrieved by different data types, including but not limited to user, date field, date, type of action |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.2. Employment Movement records | 2.3.2.2 | Able to handle re-join case. There should be field to fill in the old staff number for record tracking purpose. |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.3. General features/ System alert / reminder | 2.3.3.1 | Reminder via HR system or Employee Self-service (ESS) platform / mobile app., email reminder will be also issued if no response received for certain days |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.3. General features/ System alert / reminder | 2.3.3.2 | Enable batch update of key employee information data fields by data import from excel files, e.g. positions, reporting line., Group/Division/Department |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.3. General features/ System alert / reminder | 2.3.3.3 | All fields are downloadable |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.3. General features/ System alert / reminder | 2.3.3.4 | Historical information can be downloaded according to the specified date |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.3. General features/ System alert / reminder | 2.3.3.5 | System should facilitate advanced search options for the employee database with categorisation |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.3. General features/ System alert / reminder | 2.3.3.6 | Prior system alert/reminder for work visa expiry, contract end, retirement and refund of the sponsorship fee (like training sponsorship) before the departure |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.4. E-Filing | 2.3.4.1 | Be able to upload, store and retrieve various type of supporting documents (e.g. doc., pdf., peg., CSV) |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.4. E-Filing | 2.3.4.2 | Have e-filing for all supporting documents about past work experience, reference letter |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.4. E-Filing | 2.3.4.3 | Have e-filing for all supporting documents about professional qualifications, education, license |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.4. E-Filing | 2.3.4.4 | Have e-filing for HKID, passport, marriage certificate, birth certificate |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.4. E-Filing | 2.3.4.5 | Have control access right of the above data |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.4. E-Filing | 2.3.4.6 | Have password protection for top sensitive documents |
| 2. Human Resources Office | 2.3 Employee Record Maintenance / Management | 2.3.4. E-Filing | 2.3.4.7 | Have e-filing for all existing declaration forms (e.g., annual financial interest, investment, outside work, rental reimbursement, etc.). |
| 3. Payroll & Leave and Benefit Admin | 3.1. Payroll Process | 2.4.1 Payment  | 2.4.1.1 | The Payroll function must integrate seamlessly with the current COL system. The integration should facilitate real-time updates and synchronisation of payment data, including overseas allowances and withholding for IR56G preparation. |
| 3. Payroll & Leave and Benefit Admin | 3.1. Payroll Process | 2.4.2. Taxation  | 2.4.2.1 | The taxation function must seamlessly integrate with the current COL system, ensuring proper tax grouping and accurate recording of rental reimbursements, departure information, and tax-related data for forms IR56E, B, G, and F. This integration should facilitate real-time updates and synchronisation of tax data |
| 3. Payroll & Leave and Benefit Admin | 3.1. Payroll Process | 2.4.2. Taxation  | 2.4.2.2 | The interface should securely transfer tax data, including encrypted tax files, to comply with Inland Revenue Department (IRD) requirements. It must support the generation of all necessary tax forms, summaries, detailed checking reports, and control sheets, incorporating robust error handling and data validation to maintain data integrity. |
| 3. Payroll & Leave and Benefit Admin | 3.1. Payroll Process | 2.4.3. Posting / Headcount planning / Budgeting | 2.4.3.1 | Able to direct posting to Accounting & Finance system  |
| 3. Payroll & Leave and Benefit Admin | 3.1. Payroll Process | 2.4.3. Posting / Headcount planning / Budgeting | 2.4.3.2 | Able to handle forecast / budget plan for employee cost |
| 3. Payroll & Leave and Benefit Admin | 3.1. Payroll Process | 2.4.3. Posting / Headcount planning / Budgeting | 2.4.3.4 | Able to insert the monthly payment, MPF, allowance, tax information data from the existing HRIS system |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.1 | Leave balance counting can be based on common leave year / anniversary year, can balance the leaving based on the grade and tenure and only earned leave can be applied |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.2 | Annual leave entitlement can be automatically forfeited according to IA’s policy. Manual adjustment for exceptional case can be allowed, approval function is nice to have for the annual leave entitlement application  |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.3 | Ability to limit earn leave carry-over as applicable as per policies / ordinance |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.4 | Allow employee to enquire about the leave balance & details / apply for leave via browser / apps. anywhere anytime |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.5 | Allow employee to cancel / amend any approved application based on pre-set approval path / notification to approver |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.6 | Allow employee to check up-to-date balance / balance as of a specified date |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.7 | Approval flow can be automatically updated according to the criteria provided. |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.8 | Allow approver to approve the leave application via browser/ apps. anywhere anytime |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.9 | Enough information can be provided to approver for approving any application such as manpower status on the day/period |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.10 | Allow delegate person to proceed application / approval on behalf basis |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.11 | Annual leave closing exercise should be handled by system |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.12 | Accumulate sickness day automatically according to Employment Ordinance (EO) & company policy and can be classified as Category 1/2  |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.13 | Enable to reorder all leave date automatically to ensure the balance is correctly calculated |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.14 | Ability to suspend accruals leaves entitlement for in-eligible employees |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.15 | Allow master user to administer leave applications, including edit / input / cancel / bypass approvers / assign delegation of approvers |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.16 | Annual Leave entitlement can be clearly divided into two parts (statutory & others) |
| 3. Payroll & Leave and Benefit Admin | 3.2. Leave Administration | 3.2.1. Leave & attendance Management | 3.2.1.17 | Allow employees to apply at least 15 types of leave (e.g. sick leave, annual leave, birthday leave, no pay leave, study leave, maternity leave, etc.) New leave type(s) are able to be created.  |
| 3. Payroll & Leave and Benefit Admin | New leave type(s) are able to be created.  | 3.2.1. Leave & attendance Management | 3.2.1.18 | Able to set "HR Verify" as final approver for specific leave type |
| 3. Payroll & Leave and Benefit Admin | 3.3. Benefits administration |   | 3.3.1 | The benefits administration function must integrate seamlessly with the current COL system. This integration should support real-time updates and synchronisation of all salary and leave related data. |
| 4. Compensation Planning |   |   | 4.1 | Be able to ensure HR to distribute allocated budget to individual Department. |
| 4. Compensation Planning |   |   | 4.2 | Allow HR to set up pay rise (rating vs salary ratio) and bonus allocation matrix (rating vs performance) to guide authorized to allocate the budget |
| 4. Compensation Planning |   |   | 4.3 | Authorized users allocate pay rise and VP budget in the system. |
| 4. Compensation Planning |   |   | 4.4 | Be able to show allocated budgets and remaining budget amounts for each section, department, and the overall company. |
| 4. Compensation Planning |   |   | 4.5 | Automated reminders (via email, in-app notifications, etc.) should alert users about pending or overdue tasks to ensure timely completion of activities like budget approval or salary adjustments. |
| 4. Compensation Planning |   |   | 4.6 | Authorized users should be able to update or modify an employee’s salary within the system. The system be able to keep a log of such changes. |
| 5. Performance Management |   |   | 5.1 | Appraisal forms (Probation and Annual) via employee self-service portal / mobile app. with pre-set approval path / workflow.  |
| 5. Performance Management |   |   | 5.2 | Employee can submit his/her self-appraisal as per defined workflow and hierarchy.  |
| 5. Performance Management |   |   | 5.3 | Appraisee/appraiser can fill in the goal setting form and appraisal form online |
| 5. Performance Management |   |   | 5.4 | Ability to specify weighted values for goals, specific competencies (Knowledge, skills and abilities) matching proficiency level and year of experience, and assessment scores |
| 5. Performance Management |   |   | 5.5 | Employee should also be able to view feedback from supervisor and track the status |
| 5. Performance Management |   |   | 5.6 | Auto-generated email alert sent out to the person who is responsible for the next step, when the current step has been submitted  |
| 5. Performance Management |   |   | 5.7 | Ability to customise workflows for routing, approvals and notifications, has flexibility to setup one or different levels approval. Notification for late submission of goals setting and appraisal rating, endorsement from appraisees on the appraisal result and page to view overall appraisal status is a must.  |
| 5. Performance Management |   |   | 5.8 | Countersigner (normally supervisor's supervisor), Supervisor able to evaluate employee goal, review appraisal form filled by employee and to comment and rate as per predefined rating criteria |
| 5. Performance Management |   |   | 5.9 | Line & HR users and authorised person can generate summary of appraisal e.g. score, submission status, distribution, comment, employee information / profile |
| 5. Performance Management |   |   | 5.10 | HR user can generate cases with follow-up action, analysis reports, distribution reports in Excel, Word or PDF |
| 5. Performance Management |   |   | 5.11 | Report for performance review outcomes, including rating distribution by different department by ranks |
| 6. Training | 6.1. Course Enrolment |   | 6.1.1 | Enable to integrate with current Learning Management System ("LMS") system (i.e. Cornerstone), and enable data transfer of course enrolment between the system with Cornerstone |
| 6. Training | 6.1. Course Enrolment |   | 6.1.2 | Able to track training sponsorship for employees and sponsor limits (including examination fees and membership fees) |
| 6. Training | 6.1. Course Enrolment |   | 6.1.3 | Able to integrate with finance system and can approve the budget/cost before enrolment and can claim the reimbursement after getting the certifications |
| 6. Training | 6.2. Training Course Posting and Administration |   | 6.2.1 | The system must seamlessly integrate with current LMS system (i.e. Cornerstone)'s API to enable bi-directional data synchronisation. This includes synchronising user data (profiles, enrolments, completions), course data (metadata, content), and learning activity data (progress, scores). The synchronisation should be automated and configurable, with robust error handling and logging |
| 6. Training | 6.2. Training Course Posting and Administration |   | 6.2.2 | Be able to provide an interface for external training course approvals (i.e. CPD courses), potentially integrating with the LMS system for tracking enrolments and completions, the interface should allow for data exchange regarding approved courses, employee participation, and associated costs |
| 7. Succession Planning |   |   | 7.1 | Database to capture and manage talent pool, key positions & related key competence in the company and succession plan  |
| 7. Succession Planning |   |   | 7.2 | Project the gap of talent, the readiness of talent and those at risk of attrition |
| 7. Succession Planning |   |   | 7.3 | Ability to maintain a career plan for employees that includes their career aspirations/interest and training plan & integrated with Learning & Development |
| 7. Succession Planning |   |   | 7.4 | Ability to track employee progress against their training plan for career advancement |
| 7. Succession Planning |   |   | 7.5 | Analysis succession development path |
| 7. Succession Planning |   |   | 7.6 | Capability to analyse and for cast skill-wise, cadre-wise, category wise manpower requirements for a specified period based on data relating to new upcoming company structure, future retirement, upcoming resignations, future critical roles |
| 7. Succession Planning |   |   | 7.7 | Ability to identify and develop successors for a key role/position |
| 8. Exit Management |   |   | 8.1 | Employees can complete the Exit Survey in the system, including confirmation of last working day, any leave will be taken during notice period, reason of leave, improvement recommendation to IA. Pull down menu to list the common reason of resignation |
| 8. Exit Management |   |   | 8.2 | Employees are allowed to complete the required forms in the system (e.g “Declaration of Confidentiality Protection and Post-employment Restrictions”; “Exit Questionnaire”, “Checklist for Departing Staff”) |
| 8. Exit Management |   |   | 8.3 | Resignation Letter can be uploaded by the employee or the HR |
| 9. Employee Self-Services Platform | 9.1. Mobile app |   | 9.1.1 | The ESS platform / mobile app. can facilitate employee mobility, speed up various HR related processes, approval procedures, documents sharing and effectively enhance 2-way communication. Approval forms can be designed for handling Duty Travel applications, medical scheme enrolment the ESS platform / mobile app. can facilitate employee mobility, speed up various HR related processes, approval procedures, documents sharing and effectively enhance 2-way communication. Approval forms can be designed for handling Duty Travel applications, medical scheme enrolment |
| 9. Employee Self-Services Platform | 9.1. Mobile app |   | 9.1.2 | The ESS platform is able to allow employee to submit the change request of personal data / address etc. |
| 9. Employee Self-Services Platform | 9.2. General configuration / features |   | 9.2.1 | Leave data, employee data can be automatically synchronised with core modules timely  |
| 9. Employee Self-Services Platform | 9.2. General configuration / features |   | 9.2.2 | Employee Self-service (ESS) account/ mobile app. can be automatically created when new join record is created |
| 9. Employee Self-Services Platform | 9.2. General configuration / features |   | 9.2.3 | Status of approval activities can be tracked |
| 9. Employee Self-Services Platform | 9.2. General configuration / features |   | 9.2.4 | Notification / alert can be defined by HR users |
| 9. Employee Self-Services Platform | 9.3. Personal information |   | 9.3.1 | Employee can view certain part of personal information such as address, phone number, dependent records, emergency contact, education / professional qualification |
| 9. Employee Self-Services Platform | 9.3. Personal information |   | 9.3.2 | Ability to create, edit, view and maintain history of all employee certification, accomplishment, and skill information regardless of job title |
| 9. Employee Self-Services Platform | 9.3. Personal information |   | 9.3.3 | Allow employee to update/ add/ remove/ modify part of data online with notification to specific HR user for follow-up |
| 9. Employee Self-Services Platform | 9.3. Personal information |   | 9.3.4 | Notification/ reminder to employee via Employee Self-service (ESS) / email / mobile app regarding modification or requirement of additional data |
| 9. Employee Self-Services Platform | 9.4. Leave, payment & tax form |   | 9.4.1 | Employee can view the leave balance & details (accrual balance can also be shown) online via browser / mobile app. anywhere, anytime (only applicable to leave module) |
| 9. Employee Self-Services Platform | 9.4. Leave, payment & tax form |   | 9.4.2 | Employee can apply/amend/ cancel and get an approval for the same as per defined workflow and hierarchy via browser / mobile app. Anywhere, anytime |
| 9. Employee Self-Services Platform | 9.4. Leave, payment & tax form |   | 9.4.3 | Employee can upload the supporting documents for leave application (e.g. Sick leave certificate, maternity cert, confirmation of pregnant) |
| 9. Employee Self-Services Platform | 9.4. Leave, payment & tax form |   | 9.4.4 | Online view, retrieve, download, save and print payslip and tax return password protection |
| 9. Employee Self-Services Platform | 9.5. Supervisor module |   | 9.5.1 | Supervisor can view details of employees reporting to him/her |
| 9. Employee Self-Services Platform | 9.5. Supervisor module |   | 9.5.2 | Supervisor can approve / reject leave request initiated by employees reporting to him/her and forward the request to next level automatically |
| 9. Employee Self-Services Platform | 9.5. Supervisor module |   | 9.5.3 | Access right of dashboard function for supervisor able to be set by HR |
| 10. Forms to streamline the process |   |   | 10.1 | Allow to setup various form / survey and define approval flows such as e-medical enrolment form / request for personal information / annual declaration of compliance / employee engagement survey (e.g. 360- insights Feedback, 360-degree Feedback, etc.) |
| 10. Forms to streamline the process |   |   | 10.2 | Ability to generate custom notifications to employees/ specific group of employees based on type of notification including policy changes / internal transfer / change of reporting line |
| 10. Forms to streamline the process |   |   | 10.3 | With the pre-set workflow and approvers, HR/Approvers are able to return the form to the submitter to resubmit after amendment. |
| 10. Forms to streamline the process |   |   | 10.4 | Reminder can be sent in the preset timeline if follow up action being marked by the Approver.  |
| 10. Forms to streamline the process |   |   | 10.5 | Reports can be drawn from the forms for analysis and review purpose |
| 11. Reports  | 11.1 Reports for employee record maintenance |   | 11.1.1 | Summary of employment movement list (by specified date, month, period) |
| 11. Reports  | 11.1 Reports for employee record maintenance |   | 11.1.2 | Detailed of changes list (by staff number, by specified date): for record checking |
| 11. Reports  | 11.1 Reports for employee record maintenance |   | 11.1.3 | Termination / Resignation list (by specified date, month, period) |
| 11. Reports  | 11.1 Reports for employee record maintenance |   | 11.1.4 | List of new joined staff, should include retirees and those re-joined company (by specified date, month, period).  |
| 11. Reports  | 11.1 Reports for employee record maintenance |   | 11.1.5 | Employee record summary list for data checking / filing |
| 11. Reports  | 11.1 Reports for employee record maintenance |   | 11.1.6 | Exit interview analysis report to define patterns |
| 11. Reports  | 11.2 Reports for annual exercise |   | 11.2.1 | Eligibility list for annual pay rise and variable pay  |
| 11. Reports  | 11.2 Reports for annual exercise |   | 11.2.2 | Various types of letter will be issued to employee concerned. System can perform mail merged according to the letter type and generate the letter |
| 11. Reports  | 11.3. Reports for MPF Scheme |   | 11.3.1 | New joined member list |
| 11. Reports  | 11.3. Reports for MPF Scheme |   | 11.3.2 | Movement list |
| 11. Reports  | 11.3. Reports for MPF Scheme |   | 11.3.3 | Termination list |
| 11. Reports  | 11.4. Report for medical scheme |   | 11.4.1 | New enrolment / termination / movement list can be generated to report / download to excel based on medical provider requirements |
| 11. Reports  | 11.5. Reports for leave administration |   | 11.5.1 | Report captures leave entries and leave payment processing date |
| 11. Reports  | 11.5. Reports for leave administration |   | 11.5.2 | Work injury leave report |
| 11. Reports  | 11.5. Reports for leave administration |   | 11.5.3 | No pay leave report |
| 11. Reports  | 11.5. Reports for leave administration |   | 11.5.4 | Reports can be generated by HR users / departmental representatives |
| 11. Reports  | 11.5. Reports for leave administration |   | 11.5.5 | Detail leave report |
| 11. Reports  | 11.5. Reports for leave administration |   | 11.5.6 | Annual Leave summary report |
| 11. Reports  | 11.5. Reports for leave administration |   | 11.5.7 | Excess leave report |
| 11. Reports  | 11.5. Reports for leave administration |   | 11.5.8 | Leave forfeiture report |
| 11. Reports  | 11.5. Reports for leave administration |   | 11.5.9 | Annual leave accrual report |
| 11. Reports  | 11.5. Reports for leave administration |   | 11.5.10 | Leave entitlement adjustment report |
| 11. Reports  | 11.5. Reports for leave administration |   | 11.5.11 | Sick leave monitoring report to capture cases over certain number of sickness day |
| 11. Reports  | 11.5. Reports for leave administration |   | 11.5.12 | Maternity leave report |
| 11. Reports  | 11.5. Reports for leave administration |   | 11.5.13 | Annual leave balance report, able to capture the earned leave entitlement, leave taken, leave balance as of a specific date selected.  |
| 11. Reports  | 11.6. Other HR Analysis Reports |   | 11.6.1 | Month-end headcount report (By staff type / Department / Office) with breakdown including new joiners, leavers, transfer and promotion of staff |
| 11. Reports  | 11.6. Other HR Analysis Reports |   | 11.6.2 | Month-end attrition report (By staff type / Department / Office / Grade / Reason of Departure) |
| 11. Reports  | 11.6. Other HR Analysis Reports |   | 11.6.3 | Staff list with tenure, academic, professional qualifications, year of working experience and salary |
| 11. Reports  | 11.6. Other HR Analysis Reports |   | 11.6.4 | Ability to generate vacancy report |
| 11. Reports  | 11.6. Other HR Analysis Reports |   | 11.6.5 | Allow query creation and amendment by either system vendor or authorized HR users. Reports should be freely extracted and downloaded as Excel or PDF files etc. All data is being extracted are from columns in Employee Information modules; data included but not limited to personal information, education qualifications, visa information etc. Users can select specific data to be generated in reports via checklist. |
| 11. Reports  | 11.6. Other HR Analysis Reports |   | 11.6.6 | Allow HR and the respective Supervisor / Division Head to download the data in the created forms (e.g. Summary of the Declaration information of the annual declaration forms) |

* 1. **Expense Claim**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Module** | **Function** | **Sub-Function** | **Ref** | **Functional Specification** |
| General |  |  |  | The Solution shall include the Software as a Service (“SaaS”) and shall be a secure and reliable with helpdesk services in a single contact point. All IA related data which is processed and stored in the SAAS solution/system must be safely protected by the incumbent vendor. Please elaborate how the SAAS solution/system and the accompanying infrastructure protects the data asset from accidental and/or deliberate leakage. Please also elaborates the types of audit that are in place to monitor processes/procedures on safe handling of the data asset and the related security functions. |
| 1. Expense Claim | 1.1 Input |   | 1.1.1  | Applicant has to select expense type and input transaction date, description and transaction amount in HK$ for each claim item. |
| 1. Expense Claim | 1.1 Input |   | 1.1.2 | Allow claim to be prepared by others (e.g. an assistant can prepare a claim for a director and submit for approval after director’s review) |
| 1. Expense Claim | 1.1 Input |   | 1.1.3 | Claimant / preparer can select approver from a list (based on approval authority) |
| 1. Expense Claim | 1.1 Input |   | 1.1.4 | Claimant / preparer can withdraw a claim before approval |
| 1. Expense Claim | 1.1 Input |   | 1.1.5 | Store receipts and supporting documents in any format |
| 1. Expense Claim | 1.1 Input |   | 1.1.6 | Justification is required if the transaction date exceeds 1 month; alert approver for such case |
| 1. Expense Claim | 1.1 Input |   | 1.1.7 | Reason is required for missing receipt; alert approver for such case |
| 1. Expense Claim | 1.1 Input |   | 1.1.8 | PR/PO Number is required for claim above a certain amount |
| 1. Expense Claim | 1.1 Input |   | 1.1.9 | Generate a hash total and show it on screen |
| 1. Expense Claim | 1.1 Input |   | 1.1.10 | Assign a serial number upon submission of claim |
| 1. Expense Claim | 1.1 Input |   | 1.1.11 | Perform duplicate claim check (e.g. by staff ID, transaction date, expense type, expense amount)  |
| 1. Expense Claim | 1.1 Input |   | 1.1.12 | Alert the claimant if the claim exceeds budget (function will be activated when the budget module is implemented) |
| 1. Expense Claim | 1.1 Input |   | 1.1.13 | Allow unlimited transaction lines and allow copy line  |
| 1. Expense Claim | 1.1 Input |   | 1.1.14 | Allow scanning and uploading receipts and supporting documents to system and the information on receipt will be identified and loaded to the expense claim template for user checking |
| 1. Expense Claim | 1.1 Input |   | 1.1.15 | Allow claimant to input the claim amount in foreign currency (per invoice) and in HKD (per supporting document) |
| 1. Expense Claim | 1.2 Approval |   | 1.2.1 | Allow approver to approve multiple claims simultaneously (i.e. by batch) |
| 1. Expense Claim | 1.2 Approval |   | 1.2.2 | Allow delegation of approver (e.g. when an approver is on leave, the claim could be approved by the delegated authority in accordance with the sub-delegation of functions) |
| 1. Expense Claim | 1.2 Approval |   | 1.2.3 | Send email notification to relevant parties in approval process  |
| 1. Expense Claim | 1.2 Approval |   | 1.2.4 | Claim to be verified by Finance team after approved |
| 1. Expense Claim | 1.2 Approval |   | 1.2.5 | Finance user can ask the claimant / preparer to supplement additional information / supporting documents and select re-approval is required or not |
| 1. Expense Claim | 1.2 Approval |   | 1.2.6 | Return claim to requester when it is not approved beyond predefined expiry period (e.g. 1 month) |
| 1. Expense Claim | 1.3 Inquiry |   | 1.3.1 | History records are retrievable by Employees / Approvers |
| 1. Expense Claim | 1.3 Inquiry |   | 1.3.2 | Show the status of each expense claim (e.g. pending approval / pending Finance / paid) |
| 1. Expense Claim | 1.4 Interface |   | 1.4.1 | Could be interfaced to AP module for payment (function will be activated when the AP module is implemented) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.1 | Applicant has to select expense type (e.g. Lunch / Dinner / Gift) and input transaction date, purpose of entertainment, name of parties involved, number of external guests, number of IA staff and transaction amount in HK$ for each claim item. |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.3.2 | (same to 1.1.2) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.3 | (same to 1.1.3) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.4 | (same to 1.1.4) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.5 | (same to 1.1.5) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.6 | (same to 1.1.6) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.7 | (same to 1.1.7) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.9 | (same to 1.1.9) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.10 | (same to 1.1.10) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.11 | (same to 1.1.11) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.12 | (same to 1.1.12) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.13 | (same to 1.1.13) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.14 | (same to 1.1.14) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.15 | (same to 1.1.15) |
| 2. Claim for Entertainment Expense | 2.1 Input |   | 2.1.16 | Monitor the claim adhere to IA's policies (e.g. limits set for meals, ratio of external guests & IA staff); justification is required and alert approver for such case |
| 2. Claim for Entertainment Expense | 2.2 Approval |   | 2.2.1 | (same to 1.2.1) |
| 2. Claim for Entertainment Expense | 2.2 Approval |   | 2.2.2 | (same to 1.2.2) |
| 2. Claim for Entertainment Expense | 2.2 Approval |   | 2.2.3 | (same to 1.2.3) |
| 2. Claim for Entertainment Expense | 2.2 Approval |   | 2.2.4 | (same to 1.2.4) |
| 2. Claim for Entertainment Expense | 2.2 Approval |   | 2.2.5 | (same to 1.2.5) |
| 2. Claim for Entertainment Expense | 2.2 Approval |   | 2.2.6 | (same to 1.2.6) |
| 2. Claim for Entertainment Expense | 2.3 Inquiry |   | 2.3.1 | (same to 1.3.1) |
| 2. Claim for Entertainment Expense | 2.4 Interface |   | 2.4.1 | (same to 1.4.1) |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.1 Input |   | 3.1.1 | Applicant has to input purpose of duty travel, city/country of travel, date of travel, estimated costs and select participants (from employee list) for each travel. |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.1 Input |   | 3.3.2 | Allow application to be prepared by others (e.g. an assistant can prepare an application for a director and submit for approval after director's review) |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.1 Input |   | 3.1.3 | Applicant / preparer can select approver from a list (based on approval authority) |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.1 Input |   | 3.1.4 | Applicant / preparer can withdraw a claim before approval |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.1 Input |   | 3.1.5 | Store quotations and supporting documents in any format |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.1 Input |   | 3.1.6 | Justification is required if the application is made after the date of travel; alert approver for such case |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.1 Input |   | 3.1.10 | Assign a serial number upon submission of application |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.1 Input |   | 3.1.11 | Perform duplicate application check (e.g. by staff ID, date of travel)  |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.1 Input |   | 3.1.12 | Alert the applicant if the application exceed budget (function will be activated when the budget module is implemented) |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.1 Input |   | 3.1.16 | Applicant / preparer has to select the class of travel & hotel, justification is required if it is beyond the policy limit. |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.1 Input |   | 3.1.17 | Applicant has to indicate if the passage arrangement is varied for personal reasons. Supporting documents to show the difference in cost of travel are required and alert approver for such case |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.1 Input |   | 3.1.18 | Allow applicant to vary the passage and submit for re-approval |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.2 Approval |   | 3.2.1 | Allow approver to approve multiple applications simultaneously (i.e. by batch) |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.2 Approval |   | 3.2.2 | Allow delegation of approver (e.g. when an approver is on leave, the claim could be approved by the delegated authority in accordance with the sub-delegation of functions) |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.2 Approval |   | 3.2.3 | Send email notification to relevant parties in approval process  |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.2 Approval |   | 3.2.4 | Application to be verified by Finance team after approved |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.2 Approval |   | 3.2.5 | Finance user can ask the applicant / preparer to supplement additional information / supporting documents and select re-approval is required or not |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.2 Approval |   | 3.2.6 | Return application to requester when it is not approved beyond predefined expiry period (e.g. 1 month) |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.2 Approval |   | 3.2.7 | For training outside Hong Kong, the application would be routed to HR for review before verified by Finance |
| 3. Pre-Approval on Duty travel outside Hong Kong | 3.3 Inquiry |   | 3.3.1 | History records are retrievable by Employees / Approvers |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.1 | Applicant has to select expense type and input transaction date, description and transaction amount in Foreign Currency and HK$ for each claim item. |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.2 | (same to 1.1.2) |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.3 | (same to 1.1.3) |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.4 | (same to 1.1.4) |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.5 | (same to 1.1.5) |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.6 | Justification is required if the claim is submitted after two weeks from the completion date of the trip; alert approver for such case |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.7 | (same to 1.1.7) |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.9 | (same to 1.1.9) |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.10 | (same to 1.1.10) |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.11 | (same to 1.1.11) |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.12 | (same to 1.1.12) |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.13 | (same to 1.1.13) |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.14 | (same to 1.1.14) |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.15 | (same to 1.1.15) |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.16 | Have a mechanism for claiming trip expenses subject to a limit according to policy on duty travel outside Hong Kong  |
| 4. Claim for duty travel related expense | 4.1 Input |   | 4.1.17 | Be able to match the claim to the pre-approval itinerary |
| 4. Claim for duty travel related expense | 4.2 Approval |   | 4.2.1 | (same to 1.2.1) |
| 4. Claim for duty travel related expense | 4.2 Approval |   | 4.2.2 | (same to 1.2.2) |
| 4. Claim for duty travel related expense | 4.2 Approval |   | 4.2.3 | (same to 1.2.3) |
| 4. Claim for duty travel related expense | 4.2 Approval |   | 4.2.4 | (same to 1.2.4) |
| 4. Claim for duty travel related expense | 4.2 Approval |   | 4.2.5 | (same to 1.2.5) |
| 4. Claim for duty travel related expense | 4.2 Approval |   | 4.2.6 | (same to 1.2.6) |
| 4. Claim for duty travel related expense | 4.3 Inquiry |   | 4.3.1 | (same to 1.3.1) |
| 4. Claim for duty travel related expense | 4.4 Interface |   | 4.4.1 | (same to 1.4.1) |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.1 | Applicant has to input transaction date, travelling point, mode of transport, purpose of journey and transaction amount in HK$ for each claim item. |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.2 | (same to 1.1.2) |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.3 | (same to 1.1.3) |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.4 | (same to 1.1.4) |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.5 | (same to 1.1.5) |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.6 | Justification is required if the claim is submitted after two weeks from the completion date of the trip; alert approver for such case |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.7 | (same to 1.1.7) |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.9 | (same to 1.1.9) |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.10 | (same to 1.1.10) |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.11 | (same to 1.1.11) |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.12 | (same to 1.1.12) |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.13 | (same to 1.1.13) |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.14 | (same to 1.1.14) |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.15 | (same to 1.1.15) |
| 5. Claim for local duty travel expense | 5.1 Input |   | 5.1.16 | Applicant has to select justification of using taxi (if applicable) |
| 5. Claim for local duty travel expense | 5.2 Approval |   | 5.2.1 | (same to 1.2.1) |
| 5. Claim for local duty travel expense | 5.2 Approval |   | 5.2.2 | (same to 1.2.2) |
| 5. Claim for local duty travel expense | 5.2 Approval |   | 5.2.3 | (same to 1.2.3) |
| 5. Claim for local duty travel expense | 5.2 Approval |   | 5.2.4 | (same to 1.2.4) |
| 5. Claim for local duty travel expense | 5.2 Approval |   | 5.2.5 | (same to 1.2.5) |
| 5. Claim for local duty travel expense | 5.2 Approval |   | 5.2.6 | (same to 1.2.6) |
| 5. Claim for local duty travel expense | 5.3 Inquiry |   | 5.3.1 | (same to 1.3.1) |
| 5. Claim for local duty travel expense | 5.4 Interface |   | 5.4.1 | (same to 1.4.1) |

1. **General IT Requirements**

The Tenderer shall cover the detailed solution, implementation service and plan to implement the RMS solution.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Module** | **Function** | **Sub-Function** | **Ref** | **Technical Specification** |
| General IT |   |   | 1.01 | The Solution shall include the Software as a Service (“SaaS”) and shall be a secure and reliable with helpdesk services in a single contact point. All IA related data which is processed and stored in the SAAS solution/system must be safely protected by the incumbent vendor. Please elaborate how the SAAS solution/system and the accompanying infrastructure protects the data asset from accidental and/or deliberate leakage. Please also elaborates the types of audit that are in place to monitor processes/procedures on safe handling of the data asset and the related security functions. |
|   |   |   | 1.02 | It must be a mainstream solution which can be found in popular reports/product reviews authored by reputable IT consultancy/intelligence organisation. Please provide factual evidence.  |
|   |   |   | 1.03 | It must have a good size customer base located locally and overseas. Please provide factual evidence.  |
|   |   |   | 1.04 | The data centre shall be hosted in Asia. Pls. state the 1st, 2nd and 3rd country locations.  |
|   |   |   | 1.05 | The Solution shall be installed in the cloud platform and shall be accessible to users through web browsers (including, without limitation, Google Chrome, Mozilla Firefox, Microsoft Edge, Safari) or lightweight client application/smartphone App. |
|   |   |   | 1.06 | The Solution shall be accessible from multiple computer and mobile platforms (including, without limitation, Microsoft Windows, macOS, iOS, Android), ensuring a consistent user experience across devices. |
|   |   |   | 1.07 | All Solution data and files shall be stored securely in the cloud platform. This includes data from both computer and mobile access (including, without limitation, Microsoft Windows, macOS, iOS, Android).  |
|   |   |   | 1.08 | The Solution shall be accessible from anywhere with an Internet connection. |
|   |   |   | 1.09 | The Tenderer shall manage the Cloud platform (including, without limitation, Software, Operating Systems, Hardware, Network, Storage Systems) and perform necessary fixes or updates to ensure the Solution operates normally. |
|   |   |   | 1.1 | The Solution shall provide user authentication and access control for multiple computer and mobile platforms users. All private or master cryptographic or encryption keys must be kept exclusively at the Service Recipient’s nominated sites.  |
|   |   |   | 1.11 | The data and content must be logically segregated from other organisations’ data and content (i.e. other than IA), which are hosted in the same data centre. |
|   |   |   | 1.12 | The Tenderer must ensure there is no single point of failure in the Solution's network architecture. |
|   |   |   | 1.13 | High available is expected for the system. |
|   |   |   | 1.14 | Data at rest and data in transit shall be encrypted.  |
|   |   |   | 1.15 | The tenderer shall state the Recovery Time Objective (RTO) and Recovery Point Ojective (RPO).  |
|   |   |   | 1.16 | The Tenderer shall cover and submit the disaster recovery plan. |
|   |   |   | 1.17 | The connection between the Solution and user must be under a secure communication protocol provided by the Tenderer. |
|   |   |   | 1.18 | The Solution should be able to extend to other modules which are available in the future. The Tenderer shall also advise IA on the compatibility and interoperability of such future modules. The integration of future modules with current acquired modules are subject to additional consultation services and additional charge. |
|   |   |   | 1.19 | The Solution should be scalable and compatible with other commercially available reporting tools, including, without limitation, Microsoft Power BI |
|   |   |   | 1.2 | The Solution must allow all licensed users to concurrently access and use the Solution as per the number of user licenses purchased by IA. |
|   |   |   | 1.21 | All users must have unique username and password to identify user and ensure that role-based access control, and rule-based access control are in place. The Solution must be able to apply the least privilege principle. The privilege controls should be implemented and controls by IA’s IT staffs. |
|   |   |   | 1.22 | The Solution must support single sign-on integration with IA’s Azure Active Directory (for internal user accounts) and multi-factor authentication (for external user accounts i.e. vendor) for authenticating user access. |
|   |   |   | 1.23 | All user activities must be logged down in the Solution’s system log. The Solution must provide auditing features to each user to check their own activities. Pls. state the retention period of the audit data.  |
|   |   |   | 1.24 | The Tenderer must provide data conversion tools, strategy, and execute the data conversion plan. The data shall be converted correctly in terms of comprehensiveness and accuracy. The Tenderer must lead and manage the data conversion process. IA’s existing data may be stored in existing application system, database, Excel, and text files. (For implementation service provider) |
|   |   |   | 1.25 | The Tenderer must create the data mapping table and methodology to conduct the data conversion. The Tenderer must provide data definitions and analyse existing files for data completeness, quality, and redundancy. The data conversion methodology shall be reviewed and agreed by IA. (For implementation service provider) |
|   |   |   | 1.26 | The Tenderer must complete the data conversion from IA’s existing systems to the Solution. The Tender shall assure the smooth transition and transfer of data from the legacy systems to the new environment and interface with other systems. (For implementation service provider) |
|   |   |   | 1.27 | The Tenderer must provide their data conversion verification plan. Such plan shall be reviewed and agreed by IA. The Tenderer must conduct data verification after completing the data conversion. Data conversion reports must be provided afterwards. The reports shall include, without limitation, number of records converted, percentage of converted records, correctness of the records converted. (For implementation stage) |
|   |   |   | 1.28 | The required IA data must be converted completely and correctly. (For implementation service provider) |
|   |   |   | 1.29 | The Solution must also provide interfaces for future data conversion between IA’s systems and the Solution. |
|   |   |   | 1.3 | The Tenderer must provide data cleansing plan and execute the data cleansing process. The data cleansing plan shall be reviewed and agreed by IA. The Tenderer must provide data cleansing reports after executing the process. (For implementation service provider) |
|   |   |   | 1.31 | The Solution should have and maintain 24/7/365 availability. Planned system maintenance is expected. Prior notification with reason should be given to IA.  |
|   |   |   | 1.32 | The Tenderer must provide the cloud services on a resilient computing infrastructure which is designed to provide and maintain service availability and continuity in the case of any incidents affecting the services. |
|   |   |   | 1.33 | The Tenderer must incorporate redundancy in one or more layer to maintain the service, including, without limitation, network infrastructure, program servers, database servers and/or storage. |
|   |   |   | 1.34 | The Tenderer shall have a regular data backup and retention policy. Pls. provide the detailed backup plan including but not limit to daily, weekly, monthly or yearly backup. . |
|   |   |   | 1.35 | The backup file should be stored in an alternate site other than the primary site of the system running.  |
|   |   |   | 1.36 | IA has the right to download these data backups from cloud server and store such data backups in IA’s premises. |
|   |   |   | 1.37 | Backup process shall not introduce any interruptions to the Solution. |
|   |   |   | 1.38 | The solution should provide procedures for offboarding users, including the deletion of user data upon termination of service. Users shall have the right to be forgotten, ensuring that all personal data is permanently removed from the system when they leave. |
|   |   |   | 1.39 | The Tenderer shall have the system/solution/service availability with Service Level Agreement (SLA). Pls. provide detailed information. |
|   |   |   | 1.4 | The Tenderer shall have the technical/incident support plan with Service Level Agreement (SLA). Pls. provide detailed information. |

1. **Implementation Requirements**
	1. **Implementation Plan**

The Tenderer shall provide a proposed implementation approach, implementation plan and timeline for the proposed solution. Insurance Authority 's desires the project to start in **Apr 2025** and the system rollout date in **Nov 2025**. The detailed implementation plan should include but not limited to major activities, deliverables, responsible parties, start dates, end dates, cutover plan and contingency plan.

* 1. **Implementation Service**

The Tenderer must also provide the implementation service of the proposed solution. The implementation service should include but not limited to:

* User requirements collection
* System build
* System testing
* Integration testing
* Performance testing
* User acceptance testing
* Connectivity testing
* Data conversion
* Training and skill transfer
* Privacy Impact Assessment (PIA) and Security Risk Assessment & Audit (SRAA)
* Deployment and system rollout
* Change management
* Documentation
* Post go-live Support and Business as usual support
* Incident Management
	1. **User Requirement Collection**
* Conduct user requirements collection workshop with users to understand the detailed requirements for each required function. System prototype must be presented to users to confirm their requirements
* Prepare user requirements specifications to document user requirements collected
* Walk through the proposed system design with users to ensure all user requirements are met
	1. **System Build**
* Build the system by configuration and development required to meet all user requirements
* Prepare functional specifications, technical specifications, design workbooks, configuration workbooks and job role design specifications for all system configuration and development done
* Ensure all system configuration and development will not be affected or overwritten by future system upgrades and will not void the warranty of the system
* Ensure all system configuration and development can be packaged and migrated by automatic system migration tools from development environment to quality assurance environment, training environment and finally to the production environment
	1. **System Testing**
* Prepare system testing plan and testing scripts that include testing the functionalities as well as the security settings of the system
* Conduct system testing to verify functionalities and security settings of the system and ensure the system works as specified in the user requirement specifications, functional specifications and job role design specifications
* Follow up on any issues found during system testing
* Document the system testing result with screenshots and prepare the system testing report
	1. **Integration Testing**
* Prepare integration testing plan and testing scripts that include testing the interoperability and integrity of the entire system and integration with other systems
* Conduct integration testing to verify the integrity and interoperability of the entire system and ensure the system works with other systems as specified in the user requirement specifications and functional specifications
* Follow up on any issues found during integration testing
* Document the integration testing result with screenshots and prepare the integration testing report
	1. **Performance Testing**
* Perform performance and stress tests to ensure the system meets or exceeds the throughput and reasonable response time requirements
* Fine tune system/modules where necessary to achieve the expected performance for meeting the performance requirements
* Document performance testing result and prepare the performance testing report
	1. **User Acceptance Testing**
* Implement and configure an environment for UAT
* Provide assistance for developing UAT test plan and test scripts
* Train and provide instructions to users responsible for performing UAT
* Provide guidance and assistance during the UAT session
* Log and track issues identified during UAT
* Fix issues identified during UAT in a timely manner
	1. **Connectivity Testing**
* Arrange connectivity testing for users who will be connecting to the system from Insurance Authority offices
* Fix issues identified during connectivity testing
* Tenderer must also ensure the adequacy of the technical design, including the Interface (Application Program Interface (“API”) and/or system integration) for the functions of the proposed solution.

* 1. **Data Conversion**
* Prepare data conversion strategy and plan
* Provide data conversion tools for loading all legacy data into the system
* Perform data conversion mock runs to ensure data is loaded correctly by the data conversion tools
* Perform data conversion in the production system
	1. **Training and Skill Transfer**

The Contractor shall provide adequate training to Insurance Authority staff of different roles, including:

* Normal users
* Super users with the ability to undertake self-sufficiency to manage Business as Usual “BAU” template changes and reporting activities with basic user-level administration
* Technical support / System administrator / Security administrator
	+ The work shall include training for the Insurance Authority personnel to carry out daily system administration, operation and problem filtering.
* Application support
	+ The work shall include Application configuration / programming / development training in accordance with this specification.

The Tenderer shall be responsible for preparing all training materials / handouts and set up training environments including creating data required for training.

It is preferable to have computer-based training software package or self-study materials in addition to classroom training.

All training material and documentation shall be the property of Insurance Authority and Insurance Authority has the right to copy or reproduce the training material and documentation.

* 1. **Privacy Impact Assessment (PIA) and Security Risk Assessment & Audit (SRAA)**
* The tenderer shall invite independent third-party company which is under HKSAR's Standing Offer Agreement for Quality Professional Services 5 - Category B (Information security, privacy assessment and independent testing services) to conduct PIA and SRAA.
* The study shall include, but not limit to, assess and ensure compliance with Personal Data (Privacy) Ordinance (Cap. 486) and other relevant Ordinances, system general review, vulnerability scanning, penetration testing, code review, risk analysis.
* The tenderer shall address and tackle the findings from invited independent third-party company.
* The invited independent third-party company shall provide Privacy Impact Assessment Report, Security Risk Assessment & Audit Report, Presentation material on Privacy Impact Assessment and Security Risk Assessment & Audit, Security Audit Report.
	1. **Deployment and System Rollout**
* Prepare system rollout plan, checklist and deployment procedures in accordance with Insurance Authority processes
* Ensure no interruption to the operation of current systems in Insurance Authority during system rollout
* Deploy the system to production
	1. **Change Management**
* The tender shall provide change management strategy and outline plan for cultural change programme.
	1. **Documentation**
* The tender shall provide documentation standard and coverage for the implementation project, including but not limited to
* SA&D Report
* Business Continuity Plan
* Disaster Recovery Drill Recovery Plan and Procedure
* System Manual
* Application Operation Manual
* Application User Manual
* Training Manual and relevant Training Course Materials
* Computer Operations Procedure Manual (COPM)
* Helpdesk Service Plan and Reports
* Hotline Knowledge Base
* Incident Management Procedures
	1. **Post go-live Support and Business as usual support**
* The tender shall provide service plan and service level of the Post go-live (“PGL”) and Business as Usual (“BAU”) support.
* The tender shall provide user support for all in-scoped Insurance Authority locations.
* HR and Finance (for expense claim) background and knowledge is required to the support team of Post go-live and Business as usual stages
	1. **Incident Management**
* Provide technical support and guidance within the severity level of the incident and the response time as stated in the following table. Manage incident support including, without limitation, detection, escalation, diagnosis, status reporting, repair and recovery.
* Research, identify, and completely resolve the incidents and subsequent issues. Conduct root cause analysis and create Standard Operating Procedures (SOP) for commonly known errors, and reoccurring incidents to prevent future re-occurrence. Provide response time compliance reports, monitoring and maintenance related reports. Tenderer is required to provide the response time for each severity level (Critical, High, Medium and Low).
1. **Project Management**
* Tenderer must provide the detailed Project Schedule Plan to IA. The Project Schedule Plan shall include all the target major and minor milestones, work breakdown structures in each activity and tasks, items and products delivery schedules, activities and tasks priorities, sequences, and duration. The Project Schedule Plan shall be presented in Microsoft Project document format.
* Tenderer and Solution Vendor must conduct the following Governance Meeting with IA top management. The Governance Meetings are scheduled on project kick-off, before and after deployment of each Stage, and project closure. Tenderer’s project manager and Solution Vendor main representatives must participate and conduct these Governance Meetings. IA reserves the right to have an additional Governance Meeting with Tenderer and Solution Vendor if needed. Agenda of the Governance Meeting shall be sent to IA one week before the meeting.
* Tenderer’s project manager must conduct bi-weekly Project Team Meeting with IA project team members to report the project status, progress, service performance, incidents, auditing and/or other issues to resolve the conflict and speed up the process. Agenda of bi-weekly Project Team Meeting shall be sent to IA two days before the meeting. The project manager from Tenderer must participate in and conduct this bi-weekly Project Team Meeting.
* After the project contract is signed, the project manager from tenderer must provide Project Status Update information to IA weekly. The information should be updated to the Project Schedule Plan. The delivery of this Project Schedule Plan can be sent via email.
1. **Roles and Responsibilities of Tenderer and Solution Vendor**
* Tenderer and Solution Vendor must state their project roles and responsibilities to IA including, without limitation, service delivery and performance, support and helpdesk operation.
* The roles and responsibilities of all team members in Tenderer and Solution Vendor who participated in this project must be clearly defined. Both Tenderer and Solution Vendor must assign their main contact point.
* All team members contact information must be stated, including email, office telephone. Mobile telephone number of Tenderer and Solution Vendor main contact point must be provided to IA.
* If any roles and responsibilities, personnel information updated, Tenderer and Solution Vendor need to inform IA within 2 working days.
1. **Project Team and Professional Staff Requirements**
* The implementation team shall consist of Project Manager and Business Analyst / System Analyst.
* The Project Manager shall obtain experience at least 8 years of IT experience including at least 5 years of experience in the management of the IT projects for the implementation of IT systems.
* The Business Analyst / System Analyst shall obtain at least 5 years of IT experience including at least 3 years of experience in the development of relevant systems.
1. **Service Level Agreement**
* Tenderer is required to provide a Service Level Agreement which shall include the response time for each severity level (Critical, High, Medium and Low).
1. **License subscription and payment requirements**
* No. of HR users required is 500.
* No. of Expense Claim users required is 500.
* IA is looking for a master contract agreement for total 5-year subscription.
* The payment for the subscription is made annually.
* The subsequent purchase of additional licenses should align to the end date of the master contract.
* Implementation service cost should be stated separately.
* An assessment of a total 5-year total cost of ownership (TCO) will be conducted.
* The technical proposal and the price proposal must be stored in two envelopes. Besides, the technical proposal must not contain any PRICE information. Failure to do so might be considered as an invalid proposal.
1. **Project Completion Schedule:**
* The target completion date is Nov 2025.

End.