

KEMRI-Wellcome Trust Research Programme

Human Resource Management Information System (HRMIS)

Demonstration Scripts

Demonstration Logistics

Vendor Demonstrations		
Location:	Online Via Microsoft Teams/Zoom/Skype	
Dates:	June 17 and 18th, 2020	
Start Time:	o800hrs to 1700hrs	
Room:	Online Via Microsoft Teams/Zoom/Skype	
What will be Provided:		
N/A	N/A	N/A

Agenda

#	Topic	Script Number	Time
1	Contract Management	CM01 – CM02	15 Minutes
2	Performance Management	PM01 – PM02	15 Minutes
3	Payroll Management	PY01 – PY02	15 Minutes
4	General Functional & technical requirements	GIT01 – T04	15 Minutes

The vendor demonstration tasks have been streamlined into different activity types:

- *Demonstrate* – Perform all required tasks in the live application
- *Upload* – Upload file into the live application
- *Generate* – Generate report in the live application
- *Display* – Display in the live applications
- *Capture* – Entries to be made in the live application
- *Show* – Kick-off the process or show the results o Screen shots and/or PowerPoint may be appropriate
- *Discuss* – Explain how the process is performed in the application

Each task provided will have one or many of these action verbs to describe the level of detail/action that KWTRP is requesting. Please review all scripts for these items.

The bidder has been allocated 1 hour to perform this demonstration. It is the responsibility of the bidder to manage their time and ensure that all demo tasks have been achieved.

Contract Management

CMo1 Contract Management

CMo1 Demo Script
<p>Major requirements in this area: <i>Contract Management for Long and Short term contracts</i></p> <p>Demonstrate the ability to capture the following information from the employee contract</p> <ul style="list-style-type: none"> - Staff name - Period of contract(Short term 1-11months; Long term 1Year and above) - Donor code - Split donor code - End date of grant - Change of condition if any - Salary - Title of staff - Line manager title - Project/study/ department - Notice period 1-3 months - One-point eligibility(Merit based Pay) - Two-point eligibility(Merit based Pay) <p>Demonstrate ability to assign specific benefits and entitlements based on existing policies – e.g. leave allowance, gratuity, medical, notice period etc. on set up</p> <p>Demonstrate ability to send end of contract notifications based on the required notice period</p>
CMo2 Demo Script
<p>Major requirements in this area: <i>Contract Management Reports</i></p> <p>Demonstrate the ability to generate the following reports based on the data uploaded.</p> <ul style="list-style-type: none"> • Staff by nature of Contract • Staff by Duration of Contract • Staff by contract end or start date • Staff by grant code • Ad hoc reports

Performance Management

PMo1 Performance Management

PMo1 Demo Script

Major requirements in this area: ***Performance Management for both New and Existing Staff***

Performance Management - New Staff Probation Objectives

Demonstrate the ability by a new employee to;

- Get a probation guide to guide them to fill in the probation objectives
- Correct the information and update it before sending for approval to line manager
- Fill in the name, the title, the probation starts date and end date.
- Share their key responsibilities on the form
- Fill in their objectives and the targets on the forms
- Do one objective per time and complete it before moving to the next.
- Edit before submission.
- Save and submit
- Get an email notification showing that the probation period is over

Demonstrate the ability by the Supervisor to;

- Receive a probation guide for supervisors
- View emails of their staff who have not submitted their probation objectives
- View the probation objectives of his direct reports or overview reports
- Approve as a direct line manager or overview manager
- Receive a prompt telling them the probation period is over
- Receive an email alert.

Demonstrate the ability by HR to;

- Send a prompt for the new employee to fill in their probation objectives
- View the probation objectives from the new employee
- Send to the line manager a probation guide
- Prompt a line manager that the probation objectives have not been received.

Performance Management – Objective Setting for Existing Staff

Demonstrate the ability by Staff to;

- Get performance guide them to fill in the annual objectives
- Correct the information and update it before sending for approval to line manager
- Fill in the name, the title, the probation starts date and end date.
- Share their key responsibilities on the form
- Fill in their objectives and the targets on the forms
- Do one objective per time and complete it before moving to the next.
- Edit before submission.
- Can save and submit.

Demonstrate the ability by the Supervisor to;

- Receive Annual Objective guide for supervisors
- View emails of their staff who have not submitted their probation objectives
- View the Annual objectives of his direct reports or overview reports
- Approve as a direct line manager or overview manager
- Prompt telling them the mid-year appraisal is due.

- If not every two days, they receive an email alert.
- Demonstrate the ability by HR to;
- Send a prompt for the new employee to fill in their objectives
 - View the annual objectives from the new employee
 - Send to the line manager a performance management guide
 - Prompt a line manager that objectives have not been received
 - Able to lock two months after due date.

Performance Management – Annual Appraisal for Existing Staff

Demonstrate the ability by Staff to;

- Receive email prompt informing them it is time for end year appraisal
- Give deadline by which one can get the one-point increment.
- The reminder does not stop until this is acted on
- View their objectives and rate themselves
- Save their ratings
- Put in their comments on career development
- Rate themselves on qualitative scores on behavior(new)
- Give feedback on the appraisal
- Submit their appraisal
- Once submitted this move to the supervisor
- See their overall score
- Print or email themselves a copy

Demonstrate the ability by the Supervisor to;

- Get a notification that an appraisal is completed, and it requires their action
- Go through the system and review the objectives with the staff
- Save their ratings agreed with the staff
- Rank the staff on the qualitative score on behavioral aspects (new)
- Submit
- If submitted this goes to the Overview manager
- If returned, move back to the staff for correction and then goes back to the supervisor
- Gets the notification that this has been returned.
- The cycle repeats itself
- If submitted it moves to the overview manager
- They are able to see the staff overall score
- They can print or email themselves a copy

Demonstrate the ability by the Overview Manager to;

- Receive an email requiring them to approve the appraisal with a deadline.
- See the objectives, the supervisor's comments and their section for approval.
- Comment and save it remains in their tab
- If they submit, this moves to HR
- If they return this is moved to the supervisor and back to staff. The cycle repeats itself
- They are able to see the staff overall score
- They can print or email themselves a copy

Demonstrate the ability by HR to;

- Receive notification of submission.

- View in a dashboard, completed, non-completed, in progress, at supervisor level and at overview manager level
- Send an email reminder by way of clicking a button the email recipient can be the staff, the supervisor or the overview manager to complete the process.

PMo2 Demo Script

Major requirements in this area: ***Performance Management Reports***

Demonstrate the ability to generate the following reports based on the data uploaded.

- Annual Performance Schedule
- Employee performance form
- Training Needs Report
- Individual performance history
- Organization performance summary
- Probation performance summary
- Bi annual/ mid-year performance reports
- Performance per department
- Performance per work group or per project
- List of all those who are eligible for one point.
- Email notifications and acknowledgement message upon completion of process
- Ad hoc Reports

Payroll Management

PY01 Payroll Management

PY01 Demo Script

Major requirements in this area: **Payroll Management**

Payroll Management - Change of conditions

Demonstrate the ability by system to capture the following information that can be input in the system.

- Name of staff
- Payroll number
- Job title
- Department
- Locations
- Notification for change of contract conditions
- The change requested, and the drop down should have all of the following;
- Title, grade, grant, state of grant code, cost center, contract duration and other if any
- The system should have the capability to allow the following authorizations
- Recommendation by immediate supervisor name, signature, date
- Approval by the budget holder, name, signature, date
- Finance confirmation of funds availability and grant period.
- State if funds are available on grant – yes/no and state grant period
- Capability to have the name, signature and date
- The final confirmation is from HR that is name and signature and date.
- The system should be able to capture the history of these documents and also once approved this will form part of the source documents

Payroll Management - Payroll Changes

The system should be designed to be able to capture the following information.

- Payroll number
- Staff names -drop down feature based on staff number
- Terms of the new grade
- Station
- Salary scale
- Rate of pay per month both figures and words
- Effective date of action
- Incremental date
- To be halted - if applicable
- Pay Remarks e.g. pay period, etc.
- Type of change, rate per month, with effect from, last date of payment notes
- Deductions or recoveries which would include Reason, total amount, monthly deduction, from which date, last date of recovery and notes on the same.
- Prepared by and date
- Checked by and date
- Authorized by and date.

The system should be able to upload the source documents such as

- o Personal details form for new staff
- o Clearance form for leavers
- o Overtime sheets
- o Other deductions e.g. insurance premiums, shares contribution and salary advances
- o Loan schedules
- o List of staff eligible for leave allowances, can upload the excel and export
- o List of the staff eligible for one point
- o For new staff the details of NHIF, NSSF, ID, PIN. Pulled in from employee master details

The system should be able to

- o Update all changes from the employee master details
- o Update changes in the COCs
- o Update all other changes that relate to compensation – overtime, gratuity.

The system should be able to upload third party payments and deductions directly through a specified format

System to be able to suspend or assign benefits based on type absence – leave of absence, suspension during disciplinary, in line with existing policies

Payroll Management – Mass Payroll Payment Processing

Demonstrate the system is able to process the following mass payments to staff

Gratuity

System able to capture this from contract management and identify those eligible for gratuity payment. This is paid at 10% of the gross salary per month for each month worked over one year. This list should be eligible and able to automatically preload gratuity payments on the payroll.

One-point payment

The system should be able to reflect from those who attained 1-3 and move them on the scale for one point

COLA

The system can be preloaded with the salary scale and is able to be prompted to put in one point and it preloads on selected staff.

It is able to sieve and not put those who do not attain this score.

This module is linked to the performance management module on merit pay.
The payroll can preload everyone to receive the one point.
The system should have the capability to load in the new scale with COLA.

Leave allowances

The system can allow for selection of only those eligible and it can pay out the leave allowance.
The system allows;

Overtime

- Capping of Max OT hours as per policy
- Staff to log in on the ESS and request for OT authorization through the PI/HoD to HR
- Upon approval, system auto computes the payable amount and updates the payable amount
- Payroll accountant generates OT payments report

PY02 Demo Script

Major requirements in this area: ***Payroll Management Reports***

Demonstrate the ability to generate the following reports based on the data uploaded.

- Summary payroll changes report
- Staff paid one point
- Staff paid gratuity
- Staff paid per month
- Staff exited the payroll per year
- Staff paid leave allowance
- Banking Schedule report
- Payroll journal report
- Statutory deductions report like social security and health insurance contribution reports
- Earnings and deductions summary by payroll period
- Upgrades for the year report.
- Ad hoc Reports

General IT functional requirement and non functional requirements

GTo1. Overview of Technical Architecture

GTo1 Demo Script
<u>Overview of Technical Architecture</u> Discuss the underlying technical architecture of the application(s): <ul style="list-style-type: none">• Identify each application and specify date the general version was released, date of last point or service pack release• Differentiate between the main functional uses of each application (Consolidation, Reporting & Analysis)

GTo2. Scalability

GTo2 Demo Script
<u>Scalability</u> Discuss the application's ability to be configured for greater throughput, greater data volume or a significant increase in users. <ul style="list-style-type: none">• Performance features (parallel processing, partitioning)• Clustering• Memory Management• Key indicators that performance ceilings are being reached

GTo3 Application Security & Audit

GTo3 Demo Script

Application Security & Audit

Address the security models for both Application and Data Security:

- Show the GUI used by Administrators to perform standard Administration tasks in the areas of Application and Data Security.
- Create user and assign security attributes for specific functions.
- User authentication and integration to other security protocols
- Discuss availability of reports to security administrators to monitor and enforce security requirements; such as how to identify the specific permissions a user has been granted for functional access, data access, etc.
- Discuss whether or not the application has the ability to update security access real-time; while a user is logged on and enforce a new set of security parameters without needing the user to log off and back on again.
- Discuss the method of identifying active versus inactive users.
- Discuss how a user's permissions and/or security profile can be changed when they switch day-to-day functions or responsibilities.
 - Show audit logs and trail of user activities within the system.

GTo4 Change Management

GTo4 Demo Script

Change Management

- Discuss how changes are planned and tracked as well as how migrations between environments are managed.
- Implementation of new features/customization of existing features.
- Rollback all or part of a recent change control
- Internal version control or ability to interface with 3rd party version control tools
- Ability to dynamically identify and track all changes made including time last modified and user who performed them

Manufacturer's authorization: (If applicable)

- Reseller agreement
- Annual Qualification

- Sales certification
- IP Certificate