**Requirement**

**CHIEF- HR Onboard Preparation and Exit Clearance Process Automation**

|  |  |
| --- | --- |
| Purpose: | This document defines the requirements necessary to design the CHIEF- HR Onboard Preparation and Exit Clearance Process Automation Form.  This document is intended to be for the developers as well as for the business and system owner as a common basis for further communication and to document the requirements that were gathered with relevant personnel from the business.  Requirements must address applicable regulatory and business requirements. |
| In Scope: | The User and System Requirements including Security for its use within Lilly. |
| Out of Scope: | * Any enhancements not specifically mentioned in this document will be considered out of scope for the purpose of this project. |
| System Description: | This form is in CHIEF system, the user need to fill in this form to apply HR Onboard and Exit Process Automation Management Form. |



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# Introduction

## Terms and Acronyms

| Terms and Acronyms | Description |
| --- | --- |
| BQA | Business Quality Assurance |
| MDL | Master Document List |
| LQS | Lilly Quality Standard |
| LQP | Lilly Quality Practice |
| HR | Human Resource |
| CHIEF | China Integration E-Form |

Other ***Terms & Acronyms*** can be found in the EMEA iQMS Terms & Acronyms document.

## References

Please refer to:

* CHIEFMDL
* GIAMS

# System Description

A workflow system developed based on existing CHIEF platform, which is widely used in China Affiliate. Two workflow forms (onboard preparation form and exit clearance form) will be implemented to

* Provide clear, up-to-date, tailored on-boarding instruction and exit clearance item list for employee and supervisor
* Enable self-service online form for employee/supervisor and each supporting function
* Automate email notification and status tracking

# Business Process Modelling

HR Onboard and Exit Process Automation Management form is the essential part of the process, and will be the replacement of e-mail track. The activities of online Onboard and Exit Process Automation Management form are described as yellow part.

# Requirements Definition, Constraints, Assumption & Dependencies

## Definition of Functional (*F*) and Non-Functional Requirements (*NF*)

|  |  |
| --- | --- |
| Functional (**F**): | * Description of tasks or goals that the user must be able to perform within the system. From a business perspective, what do I need (what functions) to support my business process. * Specific guidelines, regulations, security and standards that must be adhered to; statements of policy that must be enforced in software, thereby driving system functionality. From a business perspective, what am I required to follow to support my business process. |
| Non-Functional (**NF**): | * Description of the software’s operation, development and deployment properties (e.g. performance, usability, and portability).From a business perspective, what are my other needs (not having a direct impact on how business process is supported). |

## Definition of Quality Criticality Requirements

|  |  |
| --- | --- |
| Compliance (**CC**) | * must be implemented for Compliance reasons; the system won’t be acceptable without the implementation of the requirement |
| Business (**CB**) | * must be implemented for Business reasons; the system won’t be acceptable without the implementation of the requirement |
| IT (**CIT**) | * must be implemented for IT reasons; the system won’t be acceptable without the implementation of the requirement |
| Should | * expected to be implemented if there is no constraint (ex: time, budget) ; the system will be acceptable without the implementation of the requirement |
| Criticality(No) | * Not Critical (No)  Must be implemented, but not quality critical |

## Definition of Quantitative (*Q*) and Non-Quantitative (*NQ*) Requirements

|  |  |
| --- | --- |
| Quantitative (Q) | * for requirements where the expected test result is a numeric value. |
| Non-Quantitative (NQ) | * for requirements where the expected test result is no numeric value |

## Definition of Requirement Version

Progressive number used to trace the updates of all requirements

# Requirements

The User Requirements, System Requirements and other Functional Requirements will explain what the end system will do, what is to be provided and the objectives for design of the system.

The following table clearly and accurately describes the requirements for the system and instructions.

## User Requirements

| User Req. # | | Requirement Text | | | | F / NF | | Version | | | Criticality | Q / NQ |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| General | | | | | | | | | | | | |
| U1 | | | User interfaces of detailed instructions should be displayed in Chinese. | | | | NF | 2 | | Should | | NQ |
| U2 | | | The system is open to users with a Lilly system ID. Each Lilly user can only view the onboard preparation and exit clearance form created for himself and for his subordinates, unless special privileges are assigned to the user. | | | | NF | 1 | | CB | | NQ |
| U3 | | | Group users can only access an employee’s onboard and/or exit item information of their own group. For example, an IT contact person (IT group user) cannot access an employee’s financial onboard or exit item. | | | | F | 1 | | CB | | NQ |
| U4 | | | All “Employee’s Name” and “System ID” information entered into the system must be validated against the employee database to ensure the information accuracy, except for new onboard employee himself and his system ID as it may not be entered in the active directory in time. | | | | F | 1 | | No | | NQ |
| **Administration and configuration** | | | | | | | | | | | | |
| U6 | | Group and coordinator setup  Only HR Operations team users can set up group and assign a coordinator for each group  The New page of Section Management Information includes:  Section Name, Section Description, Coordinator (Search field), Save and Cancel button. Use the Cancel button can return to the list page.  The list page includes: No., Section Name, Section, Coordinator, Operation column (Edit and Delete button). | | | | F | | 4 | | | No | NQ |
| U5 | | HR Operations user setup  Developer setup an HR administrator in the database. Then the administrator can setup other’s Operator Users.  The New page of HR user management information includes: User (Search field), Role (Dropdown list), Save and Cancel button. Use the Cancel button can return to the list page.  The list page includes: No., Login ID, User Name, Role, Operation column (Edit and Delete button). | | | | F | | 4 | | | No | NQ |
| U9 | | Onboard Item Template Management setup  HR Operations team users can set up a new Employee Category, which is later linked to a template for populating onboard preparation items.  The New page of Onboard Item Template Management includes: Employee Category, Description, Items (Include all items, the mandatory items are checked status can’t be edited), Save and Cancel button. Use the Cancel button can return to the list page.  The list page includes: No., Employee Category, Description, Operation(Edit and Delete button, the Category can’t be edited after saved )  To remove the Employee Category this attribute on the Exit Clearance Form detail page. | | | | F | | 4 | | | No | NQ |
| U7 | | Item Management Setup for Onboard Management Information configuration  Each group coordinator can configure onboard preparation items for his own group. The configurable information includes: Section Name, Item Name, Contact Person, Contact Mail, Phone Number, Mandatory(checkbox), Need to Dispatch(checkbox), , and Need to Send mail(checkbox), Instruction (text area), Save and Cancel button. Use the Cancel button can return to the list page.  If “Need to Send Mail “attribute of an item is set to “no”, system-generated notification emails will not be sent to the contact person of the item.  The list page includes: No., Section Name, Item Name, Contact Person, Phone Number, Mandatory, Need to Dispatch, Need to Send Mail, Operation(Edit and Delete button)  The different parts have the same coordinator. | | | | F | | 4 | | | No | NQ |
|  | |  | | | |  | |  | | |  |  |
| U10 | | The delete Action in the admin part  All the delete action are logically deleted. | | | | F | | 4 | | | No | NQ |
| **Onboard Preparation Process Automation** | | | | | | | | | | | | |
| 1. Initial the onboard preparation form | | | | | | | | | | | | |
| U11 | | Employee onboard basic information  Only HR Operations team users can create, save and update employee onboard basic information in the system. It includes: Employee System ID, Employee Name, Employee Phone, Employee Group, Employee Category, Expected Onboard Date (Date field), Eligible for Onboard (Yes and No Button, default to No), Eligible Onboard Date, Supervisor, notifier1, notifier2, notifier3, Department, Position, Cost Center, Work Location, Product, Group Key, Supervisor Confirm Actual Onboard.  Supervisor and notifiers share the same role for onboard confirmation and being informed. | | | | F | | 2 | | | No | NQ |
| U51 | | Only when Eligible for Onboard is selected “Yes”, Eligible Onboard Date can be entered and saved. | | | | F | | 3 | | | CB | NQ |
| U12 | | Default onboard item display and selection  Based on EMPLOYEE CATEGORY (i.e. sales or non-sales), pre-defined default onboard preparation items grouped by department are displayed for modification (i.e. add or remove items) by HR Operations team users only.  Different parts have the same coordinator. | | | | F | | 2 | | | No | NQ |
| U13 | | Submission for supervisor’s confirmation  Upon the submission of onboard preparation items by HR Operations team user only, an email will be automatically sent to new employee’s supervisors (listed in Employee Basic Information) with the URL link for onboard preparation item confirmation.  If the expected onboard date is within 2 working days of the form submission day, the email will not be sent. Instead, a dialogue will be displayed to remind HR to confirm the onboard preparation item. | | | | F | | 1 | | | CB | NQ |
| 1. Confirm Onboard Preparation Item | | | | | | | | | | | | |
| U14 | | Supervisor and HR confirmation  Supervisor and HR can add or remove non-mandatory items, update PRODUCT, and GROUP KEY information in the system during the confirmation process.  Upon the confirmation, an email will be automatically sent to the relevant item contact persons (needs to be email notified)instead of all contact persons, with the link of the form. | | | | F | | 2 | | | No | NQ |
| U15 | | System’s auto confirmation  If a submitted form is not confirmed by supervisor within 2 working days (Monday to Friday) after submission the system will confirm automatically with an email sent to supervisor, relevant item contact persons with the link of the form, or if the expected onboard date is within 2 working days of the submission date, the system will confirm automatically with an email sent to relevant item contact persons with the link of the form. | | | | F | | 2 | | | No | NQ |
| U16 | | Confirmation status  The system is able to record whether onboard preparation form is confirmed by supervisor, by HR, or by system automatically in database | | | | F | | 2 | | | No | NQ |
| 1. Activate Onboard Item Dispatch Process | | | | | | | | | | | | |
| U17 | | Update expected onboard date and eligibility by HR  Only HR Operations Team users can update the expected onboard date and Eligible for Onboard.  When the onboard status is not eligible, and the expected onboard date is updated, the system-generated email will be sent to Supervisor.  When Eligible onboard field is updated, the system-generated email will be sent to Supervisor. | | | | F | | 2 | | | No | NQ |
| U18 | | Cancelation of onboard preparation by HR  Only HR Operations Team users can cancel the onboard process if the Supervisor Confirm Actual Onboard is not filled and a notification email will be sent to the supervisor and contactor to stop the preparation process. | | | | F | | 1 | | | No | NQ |
| U19 | | Onboard date email notification  If the eligibility is set to yes, an email is sent to the supervisor one working day before the Expected Onboard Date at 13:00. | | | | F | | 1 | | | No | NQ |
| U20 | | Record actual onboard date  The supervisor can update ACTUAL ONBOARD if “Eligible for Onboard” is YES. The SUPERVISOR CONFIRM ACTUAL ONBOARD cannot be earlier than the current day or earlier than the Eligible for Onboard data and EXPECTED ONBOARD DATE.  Only Actual Onboard Date is recorded by supervisor in the system, the system will send a notification email to relevant contactor then item contact person can dispatch items in the system. | | | | F | | 3 | | | CB | NQ |
| U21 | | Upon updating ACTUAL ONBOARD DATE, a welcome email will be sent to the new employee immediately. If the employee’s email address is not available yet, the system will send an email to the relevant supervisor instead. | | | | F | | 2 | | | CB | NQ |
| 1. Dispatch Onboard Item: | | | | | | | | | | | | |
| U22 | | Dispatch item by contact person  Item contact person can view employee basic information, onboard prepare items information (Action, Status, item, Instruction, contact person, System ID, Phone Number, Dispatch Date, Sender, Confirm Date Confirmer, remark) update dispatch status (not dispatched未发放, no-need-to-dispatch无需发放, dispatched已发放, and ineligible拒绝发放). The system will log the user ID who performs the dispatch activity in the system.  A pop-up box containing detailed wording should be displayed when a mouse is placed on the word of “Instruction”.  After an item is dispatched, the system will send a notification email to employee with the link.  Each item contact person cannot view item information of other groups. | | | | F | | 2 | | | No | NQ |
| U23 | | Status change of no-need-to-dispatch items  Preparation items that do not need to be dispatched are set to “无需发放” automatically after Supervisor entered Actual Onboard date. | | | | F | | 1 | | | No | NQ |
| 1. Confirm item reception | | | | | | | | | | | | |
| U24 | | Employee is able to confirm in the system each item he/she received. The system will log the confirmation date and time. | | | | F | | 1 | | | No | NQ |
| U25 | | An email will be sent to the employee who has not confirmed the reception of an item after two weeks of Actual Onboard Day. | | | | F | | 1 | | | No | NQ |
| 1. ~~Onboard preparation form search functions (PC only)~~ | | | | | | | | | | | | |
| ~~U26~~ | | ~~By employee~~  ~~A group user can search the status of an onboard preparation form by employee name, employee’s system ID.~~  This RQ has been deleted in V3.0 | | ~~F~~ | | | | | ~~1~~ | | ~~No~~ | ~~NQ~~ |
| ~~U27~~ | | ~~By person performing the task~~  ~~A group user can list onboard preparation forms that processed already or need to be processed by himself or his group~~.  This RQ has been deleted in V3.0 | | ~~F~~ | | | | | ~~1~~ | | ~~No~~ | ~~NQ~~ |
| ~~U28~~ | | ~~By period~~  ~~A group user can list onboard preparation forms of a certain period.~~  This RQ has been deleted in V3.0 | | ~~F~~ | | | | | ~~1~~ | | ~~No~~ | ~~NQ~~ |
| ~~U29~~ | | ~~An employee can list onboard preparation forms created for himself and for his subordinates.~~  This RQ has been deleted in V3.0 | | ~~F~~ | | | | | ~~1~~ | | ~~No~~ | ~~NQ~~ |
| **Exit Process Automation** | | | | | | | | | | | | |
| 1. Initiate the exit clearance form | | | | | | | | | | | | |
| U30 | Employee exit basic information  Only HR Operations team users can create, save and update employee exit basic information in the system. It includes: Employee System ID, Employee Name, Employee Phone, Employee Group, Employee Category, last date on Premises, Contract Termination Date, Supervisor, Notifier1, Notifier2, Notifier3, Department, Position, Cost Center, Work Location, Product, and Group. | | | | F | | | 2 | | | No | NQ |
| U31 | Clearance form item determination  Only HR Operations team users can create and submit the exit clearance form to each coordinator in the system for coordinator or item contact person to define and confirm the clearance items on the clearance form.  Different parts have the same coordinator. | | | | F | | | 2 | | | CB | NQ |
| U47 | After HR submitted the form the relevant coordinator and contact person will receive the notification email (according to whether an item is set to notify contact person or not.  As long as an item contact person needs to be email notified, the coordinator of the same group will be notified as well.  Refer to U9. | | | | F | | | 2 | | | No | NQ |
| ~~U48~~ | ~~For return items defined as mandatory, they are correctly displayed in the form for the status, and those items don’t need to be confirmed by coordinator/contact person.~~  This RQ has been deleted in V3.0 | | | | ~~F~~ | | | ~~2~~ | | | ~~No~~ | ~~NQ~~ |
| U32 | HR confirmation on clearance item  In case there are less than 5 working days between HR’s exit clearance initiation and the employee’s last working day, the system will bypass the email notification to each group coordinator. HR can confirm the exit items and an email is sent to the employee and relevant supervisor with the link after the confirmation. | | | | F | | | 2 | | | CB | NQ |
| U33 | Coordinator’s confirmation on clearance item  Coordinator can view the exiting employee’s exit basic information, add and remove items to confirm what need to be returned to the company by the exiting employee. Once an item is confirmed by the coordinator, an email is sent to the employee and relevant supervisor with the link. | | | | F | | | 1 | | | CB | NQ |
| U52 | When one group (e.g., IT) has received all return items of a form, the contact person of IT group can view this form in “Returned” section. For contact persons of other groups who have not received items yet, they will view this form in “Waiting for return” section.  某个部门的所有物品都已经归还的情况下(其他部门的还未归还)，该部门的Contactor在表单Overview里查看，表单应显示已归还的栏位中 | | | | F | | | 3 | | | CB | NQ |
| U34 | Employee’s view of clearance form  The exiting employee can view the exit clearance item status (1.Not return未归还, 2. Return to supervisor已还至主管, 3. Returned已归还, 4. never returned无法归还) | | | | F | | | 2 | | | No | NQ |
| U35 | Email reminder to group coordinators and contactors for confirmation  An email will be sent to the coordinator and contactors if all following criteria are met:   * The coordinator has not confirmed the exit item for his group * It is one day before the earliest suggested return date of the potential return items for the coordinator’s group | | | | F | | | 1 | | | CB | NQ |
| 1. Record return information | | | | | | | | | | | | |
| U36 | Return via Supervisor  A supervisor only can view confirmed items and detail information of his subordinate’s on exit clearance form. The supervisor can update clearance item return information on the system.  The system will send an email to the employee with the link after supervisor updated clearance item return information. | | | | | | F | 2 | | | No | NQ |
| U49 | Clearance item’s return information, including return date, remarks, return status in detail item grid., Updater (auto captured by system) and update date(auto captured by system) are retained in the database for future queries. | | | | | | F | 2 | | | No | NQ |
| U37 | Return directly to business group  Group users can view the employee’s exit basic information and exit clearance item information of their group only. Group users can update clearance item return information on the system, including return date, remarks, return status, updater (auto captured by system) and update date(auto captured by system).  The system will send an email to the employee with the link afterbusiness group updated clearance item return information. | | | | | | F | 1 | | | No | NQ |
| U38 | Return status and logic  There are four return statuses: 1) not returned未归还, 2)returned to supervisor已还至主管, 3)returned 已归还and 4) never returned 无法归还. The return status can only be changed from the ascending order, i.e. from 1 to 2, 2 to 3, and 1 to 3.  Supervisor can update the status from 1 to 2 and 4. The Business group can only update the status from 1 to 3 or 2 to 3.  After business group update the status from2 to 3, system will send an email to the supervisor with the link. | | | | | | F | 2 | | | CB | NQ |
| U39 | A system email will be sent to employee and supervisor 1 day before employee’s last working day for all Items that not returned yet. | | | | | | F | 1 | | | No | NQ |
| U40 | A system email will be sent to supervisor 1 week after employee’s last working day, if any item is not returned either to supervisor or to supporting functions directly. | | | | | | F | 2 | | | CB | NQ |
| 1. ~~Exit clearance form search functions (PC only)~~ | | | | | | | | | | | | |
| ~~U41~~ | ~~By employee~~  ~~A group user can search the status of an exit clearance form by employee name, employee’s system ID.~~  This RQ has been deleted in V3.0 | | | | | | ~~F~~ | ~~1~~ | | | ~~No~~ | ~~NQ~~ |
| ~~U42~~ | ~~By person performing the task~~  ~~A group user can list exit clearance forms that processed already or need to be processed by himself or his group.~~  This RQ has been deleted in V3.0 | | | | | | ~~F~~ | ~~1~~ | | | ~~No~~ | ~~NQ~~ |
| ~~U43~~ | ~~By period~~  ~~A group user can list exit clearance forms of a certain period.~~ This RQ has been deleted in V3.0 | | | | | | ~~F~~ | ~~1~~ | | | ~~No~~ | ~~NQ~~ |
| ~~U44~~ | ~~An employee can list exit clearance forms created for himself and for his subordinates.~~  This RQ has been deleted in V3.0 | | | | | | ~~F~~ | ~~1~~ | | | ~~No~~ | ~~NQ~~ |
| 1. Cancelation of Exit by HR | | | | | | | | | | | | |
| U45 | Cancelation of Exit by HR  Only HR Operations Team users can cancel the Exit process before Contract Termination Date and a notification email will be sent to the supervisor, coordinator, contactor and employee to stop the exit process. | | | | | | F | 2 | | | No | NQ |
| 1. Miscellaneous | | | | | | | | | | | | |
| U46 | All operation users and employees can print the completely onboard and exit form with detailed item instruction related with them. | | | | | | F | 4 | | | CB | NQ |
| U50 | iPad end users can access the HR Onboard Preparation and Exit Clearance Process Automation form via Safari directly via a link. | | | | | | F | 3 | | | CB | NQ |
| Exit Clearance Form Changes | | | | | | | | | | | | |
| U51 | 用户权限更改成role base   1. Operator，Admin/system Owner，coordinator，contact person用户变成role base 2. 相同role 的人可以看到的表单是相同的 3. 相同role的人权限相同，能够做相同的操作和接收邮件 4. 如果是新加入的用户也可以看到这个role 下面相关的所有数据（包含历史表单数据） | | | | | | F | 1 | | | CB | NQ |
| U52 | 增加搜索和导出报表功能，搜索和导出功能开放给admin，contactor和coordinator用户，admin可以查看和导出所有的数据，其他用户可以查看和导出和自己相关的数据，分为   1. 入职表单搜索和导出 2. 离职表单搜索和导出 3. 入职表单和IT资产申请，IT资产暂借申请，门禁卡申请4个表单进行合并搜索和导出 | | | | | | F | 1 | | | CB | NQ |
| U53 | 入职表单search界面：上部分是搜索条件，下面是搜索结果列表，显示结果按照物品进行显示，有几个物品就显示几条数据，点击导出按钮可以导出数据，导出也按照物品条目进行导出（同一用户可能会有多条数据）  1.搜索条件包含：   1. No 2. System ID 3. Employee Name 4. Expected Onboard date 5. Supervisor   2.搜索结果内容包含：   1. No 2. Status 3. Requestor 4. System ID 5. Employee Name 6. Expected Onboard Date 7. Eligible for Onboard 8. Supervisor 9. Actual Onboard Date   3.导出文件内容包含：   1. No 2. Status 3. Requestor 4. Request Date 5. System ID 6. Employee Name 7. Employee Phone 8. Employee Group 9. Employee Category 10. Employee Onboard 11. Eligible For onboard 12. Eligible for Onboard Date 13. Supervisor 14. Department 15. Position 16. Cost Center 17. Word location 18. Actual Onboard Date 19. Item 20. Function Name 21. Item Status 22. Distribute Date 23. Comment | | | | | | F | 1 | | | CB | NQ |
| U54 | 离职表单search界面：上部分是搜索条件，下面是搜索结果列表，显示结果按照物品进行显示，有几个物品就显示几条数据，点击导出按钮可以导出数据，导出也按照物品条目进行导出（若同一员工有多样物品未确认或未归还，则显示多条记录）  1.搜索条件包含：   1. No 2. System ID 3. Employee Name 4. Last Date on Premises 5. Contract Termination Date 6. Supervisor 7. Working Location   2.搜索结果包含：   1. No 2. Status 3. Requestor 4. System ID 5. Employee Name 6. Last Date on Premises 7. Contract Termination Date 8. Supervisor 9. Request Date   3.导出文件内容包含：   1. No 2. Status 3. Requestor 4. Request Date 5. System ID 6. Employee Name 7. Employee Group 8. Employee Type 9. Employee Category 10. Department 11. Supervisor 12. Position 13. Work Location 14. Contract Termination Date 15. Last date on Premise 16. Waiting confirm Item 17. Function Name 18. Confirmed Item 19. Confirmed Item Status 20. Return Date 21. Function Name | | | | | | F | 1 | | | CB | NQ |
| U55 | 离职表单合并搜索和导出界面：上部分是搜索条件，下面是搜索结果列表，可以点击导出按钮导出数据，搜索结果和导出文件按照用户进行导出，有多少数据就显示多少条目数据  1.搜索条件包含：   1. System ID 2. Employee Name 3. Assets and Item 4. Form 5. Form Status 6. Form Submitted Date 7. Form Closed Date   2.搜索结果包含：   1. System ID 2. Employee Name 3. Assets and Item 4. Form 5. Form Status 6. Form Submitted Date 7. Form Closed Date   3.导出文件内容包含：   1. System ID 2. Employee Name 3. Assets and Item 4. Form 5. Form Status 6. Form Submitted Date 7. Form Closed Date | | | | | | F | 1 | | | CB | NQ |
| U56 | 离职表单增加模板功能，HR operation team的用户可以在此模块维护Category信息，具体可以refer U9   1. 创建界面包含：Employee Category，Description, Items(包含所有的item, 必选的item状态不能更改), save and Cancel 按钮, 点击cancel按钮可以返回到list界面 2. 列表界面包含：No, Employee Category, Description, Operation(Edit 和 delete按钮 ) | | | | | | F | 1 | | | CB | NQ |
| U57 | 离职物品属性设置：  在Item management界面可以维护离职物品属性，不同部门下的coordinator可以维护自己的item信息，  属性设置界面包含：   1. Section Name，必填 2. Item Name，必填 3. Contact Person，必填，（输入用户的system ID搜索用户），可以添加多个 4. Need to send mail: checkbox 5. Send to contact person：checkbox，选择此项，系统通知邮件发给所有的contact person 6. Send to other mailbox：输入框，选择此项，系统通知邮件发到此邮箱中不发给contact person   4.5.6三个字段的填写逻辑为三选一；如果勾选了4，那么5和6不需要选择；如果没有勾选4，那么5 和6二选一   1. Employee Contact Information：选填，包含Name，Phone Number， Email Address三个字段，如果填写了则在项目清单中的item信息上会会显示此部分内容 2. Item Attributes：   1）Need to collect，checkbox，   1. 如果勾选则此item需要显示在离职项目清单中； 2. 如果没有勾选则不显示   2）Need to track：checkbox，   1. 如果勾选，则此item是维持目前逻辑需要进行归还操作； 2. 如果不勾选则此item是一个提醒类的item， item的状态为“温馨提醒，请点击右侧详情进行了解”，员工需要在归还清单中看到这个item，contact person也可以收到邮件，但是contact person不需要操作 3. Instruction：输入框，必填，coordinator在编辑此字段的时候可以添加hyper link，点击此链接可以访问Lilly internal website 4. Save和Cancel按钮：cancel 按钮是取消当前操作，可以返回到item列表界面 5. Item 列表界面包含内容：No., Section Name, Item Name, Contact Person, Phone Number, Operation(Edit and Delete button) | | | | | | F | 1 | | | CB | NQ |
| U58 | 客制化Item信息   1. 用户创建表单的时候通过选择不同的部门关联出不同的item，可以看到template中勾选的所有item。表单上会说明"以下归还物品清单供您参考，各部门同事会在表单发出后的3天内为您客制化您的归还物品清单” 2. 表单提交之后，对于需要发邮件的item系统自动发通知邮件给contact person或者发到公共邮箱中 3. 表单提交之后用户和主管不能修改表单信息 4. Item contact person可以进入表单对item进行添加和删除操作 5. 表单提交之后，3个工作日内，item contact person可以对item进行增加或删除的操作，3天后不能在对item进行修改；如果contact person在3天内没有做任何操作，系统默认按照template中的item情况进行归还 6. 3天后系统自动发邮件给离职员工和主管，告知表单已经克制完成 7. 3天后系统针对离职项目清单中的item，给需要发邮件的contact person发通知邮件 8. Item客制化完成后（3天后），contact person不能在对表单做任何操作，coordinator可以进入表单对item进行增加或删除操作；如果有修改系统发通知邮件给离职员工，主管，coordinator和contact person 9. Contact person只能最和自己相关的item进行增加和删除，不会影响到统一部门下的其他用户   Note：3天时间是按照工作日进行计算，通过服务器时间进行比较，例如：  2016-2-1提交表单，那么3个工作日就是1,2,3三天，如果遇到节假日自动后延 | | | | | | F | 1 | | | CB | NQ |
| U59 | 待审批列表显示内容：   1. 待审批表单显示在waiting confirm 列表中 2. 审批人审批完成后就显示在returning列表中 | | | | | | F | 1 | | | CB | NQ |
| U60 | 文字和字段的修改：   1. 在离职清单中没有的item和function不需要显示在表单中 2. 删除表单中的“产品”字段 3. 增加中文姓名字段，放在现在的Employee Name下面，文本输入框，选填项 4. 表单列表界面增加城市（working location）和劳动关系终止日两个字段，城市字段放在Request Date前面，劳动关系终止日字段放在最后办公日期后面 5. 表单的字段title和内容都更改成中英文对照的样式 6. Item status增加“无需归还”选项，contactor和coordinator可以对item进行操作 7. Coordinator可以作为contact person的backup对item进行归还操作 | | | | | | F | 1 | | | CB | NQ |
| U61 | 增加提醒邮件：在劳动关系终止日期前5天系统发自动通知邮件给状态还是open的item contact person | | | | | | F | 1 | | | CB | NQ |
| Onboard Instruction Form自动化 | | | | | | | | | | | | |
| U62 | 输入员工的System ID，自动显示以下员工基本信息，不需要手动输入：   1. Chinese Name (中文姓名) : 2. Employee Phone (员工电话) : 3. Employee Group/Type (员工组): [礼来直签员工、合同员工、实习生…] 4. Supervisor (主管) : 5. Position Title(职位名称) : 6. Cost Center (成本中心) : 7. Working Location (工作地点) : 8. Department (部门): | | | | | | F | 1 | | | CB | NQ |
| Exit Instruction Form自动化 | | | | | | | | | | | | |
| U63 | 输入员工的姓名，带出System ID后，自动显示以下员工基本信息，不需要手动输入：   1. Chinese Name (中文姓名) : 2. Employee Phone (员工电话) : 3. Employee Group/Type (员工组): [礼来直签员工、合同员工、实习生…] 4. Employee Category (员工类别): [销售人员、销售管理人员 or行政人员] 5. Supervisor (主管) : 6. Position Title(职位名称) : 7. Cost Center (成本中心) : 8. Working Location (工作地点) : 9. Department (部门): | | | | | | F | 1 | | | CB | NQ |

The next user requirement will start at U53. For email template, please refer to the notification email list file provided by the business separately.

## Security System Requirements

| Refer to User requirement | System  Req. # | Requirement Text | Version | Criticality | Q / NQ |
| --- | --- | --- | --- | --- | --- |
| U2 | S1 | Lilly simplified Sign On is enforced for user authentication. | 1 | CIT | NQ |

**Requirement**

**CHIEF–HR Onboard Preparation and Exit Clearance Process Automation**

**Revision History & Approval Page**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Version | Reason | Date | Summary of Changes | Author |
| 1.0 | Update requirements for CR: CHG0089529 | 29-Feb-2016 | AddU51,U52,U53,U54,U55,U56  U57,U58,U59,U60,U61 | Mary Yan |
| 3.0 | Update requirement for CR: [CHG1280088](https://lilly.service-now.com/change_request.do?sys_id=f7523920136e53c00961bbc76144b0c8&sysparm_view=) | 20-Jun-2018 | Add U62 | Sandy Wang |
| 4.0 | Update requirement for CR: CHG1295488 | 12-Jul-2018 | Add U63 | Sandy Wang |

The Requirements Document is kept current throughout the existence of the application. Changes to a release version of the Requirements Document will be described in the Revision History of this document, specifying the person making the change, the date of the change and the updated section.

Any handwritten changes that change the meaning or content of the document must be counter-signed and dated by the approver(s) of the document.For documents related to GMP computer systems, Computer Systems Quality must counter-sign and date any handwritten changes to documents requiring their approval.For documents related to GMP computer systems, Computer Systems Quality must counter-sign and date any handwritten changes to documents requiring their approval

**Reviewers**

|  |  |  |
| --- | --- | --- |
| Name | Role | Location |
| *Haining Li* | *Project Manager* | *Innocellence,Dalian* |
| *DAN ZHI HU* | *Business Users* | *Shanghai, China* |

**System Custodian Approval**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| My signature means | * That appropriate people have reviewed this document. * The requirement meets all the requirements of the Lilly Quality Practice: Requirements and Design LQP302-16. | | | |
|  | | Date: |  |
| SC Signature: Xiang Richard Han–Sr. Manager-Business Integration | |  | dd-Mmm-yyyy |

**System Owner Approval**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| My signature means | * That appropriate people have reviewed this document. * The requirements are consistent with applicable regulations. * The functional, security, and ER/ES requirements accurately reflect the intended use and scope of the system. | | | |
|  | | Date: |  |
| SO Signature: Grace JIA YI ZHANG (Associate HR Director - Operations) | |  | dd-Mmm-yyyy |