

Demonstration on Academic Timesheet System for academic, teaching and research staff

8th Jun 2017



Agenda

- Project background and new Cost Allocation Guidelines (CAG)
- Demonstration on the online Academic Timesheet System
- UGC's guidance on UGC activities
- Questions and Answers

Project Background

- Key Drivers for the Revamp of FIS:



To meet new UGC requirements

- Segment Reporting in 2016-17
- Cost Allocation Guidelines in 2018-19



Support long-term needs of HKBU
and cater for future changes



Align with sisters institutions in using
ERP to support operation and keeping
up with technological advancements

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Selected Package Solutions

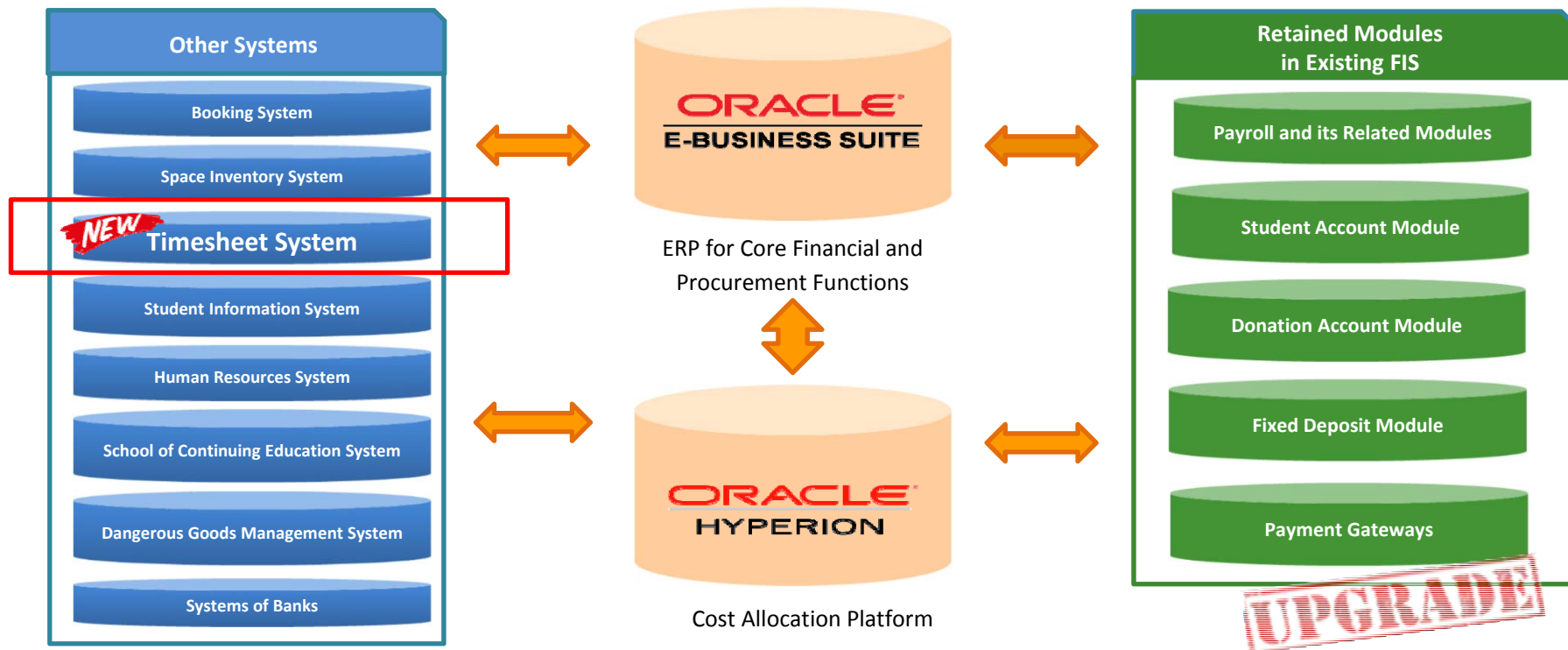
Deloitte.

Appointed Implementation Consultant

Interfaces with Retained Modules and Systems



- Some retained FIS modules and a new timesheet system will be enhanced/developed by **ITO** for integration



New Cost Allocation Guidelines (CAG) of UGC

Objectives

- To improve financial transparency and cost charging mechanisms among UGC-funded institutions.
- To **provide documentary evidence** there is **no cross-subsidisation** of UGC resources to non-UGC-funded activities.



New Cost Allocation Guidelines (CAG) of UGC

Requirements

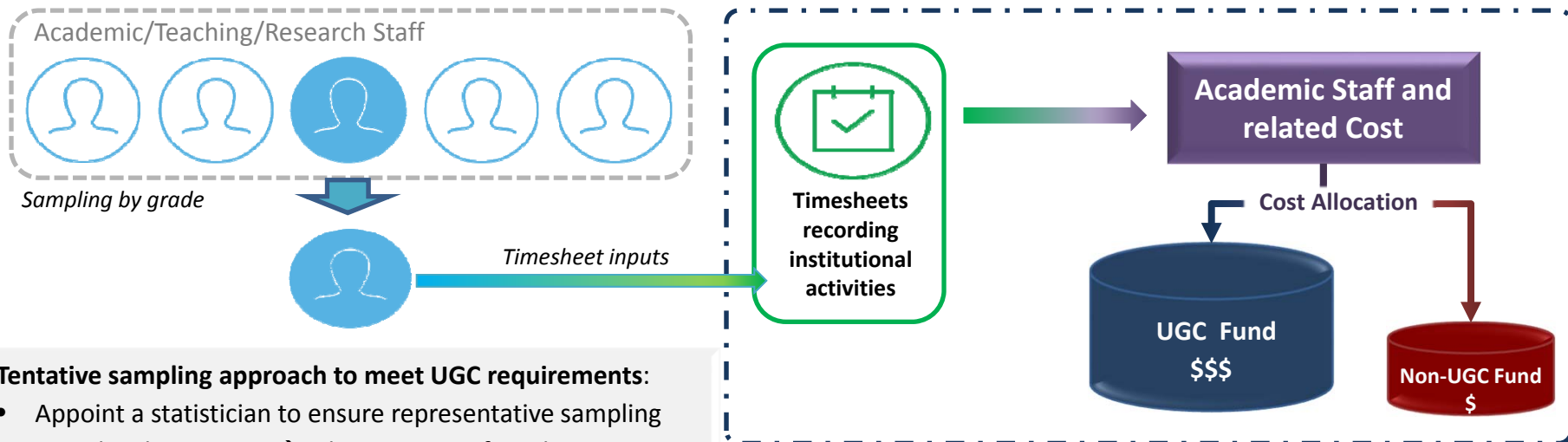
- One of the requirements is to prepare financial statements for FY2018-19 with:
 - allocation of **academic staff-related costs** into **UGC/non-UGC segments** based on the **analyses of actual time spent records of the academic staff** (including teaching and research staff).

Full set of Cost Allocation Guidelines is available at UGC website

<http://www.ugc.edu.hk/doc/eng/ugc/note/CAGs.pdf>

CAG Requirements

- Timesheet for Academic, Teaching and Research Staff



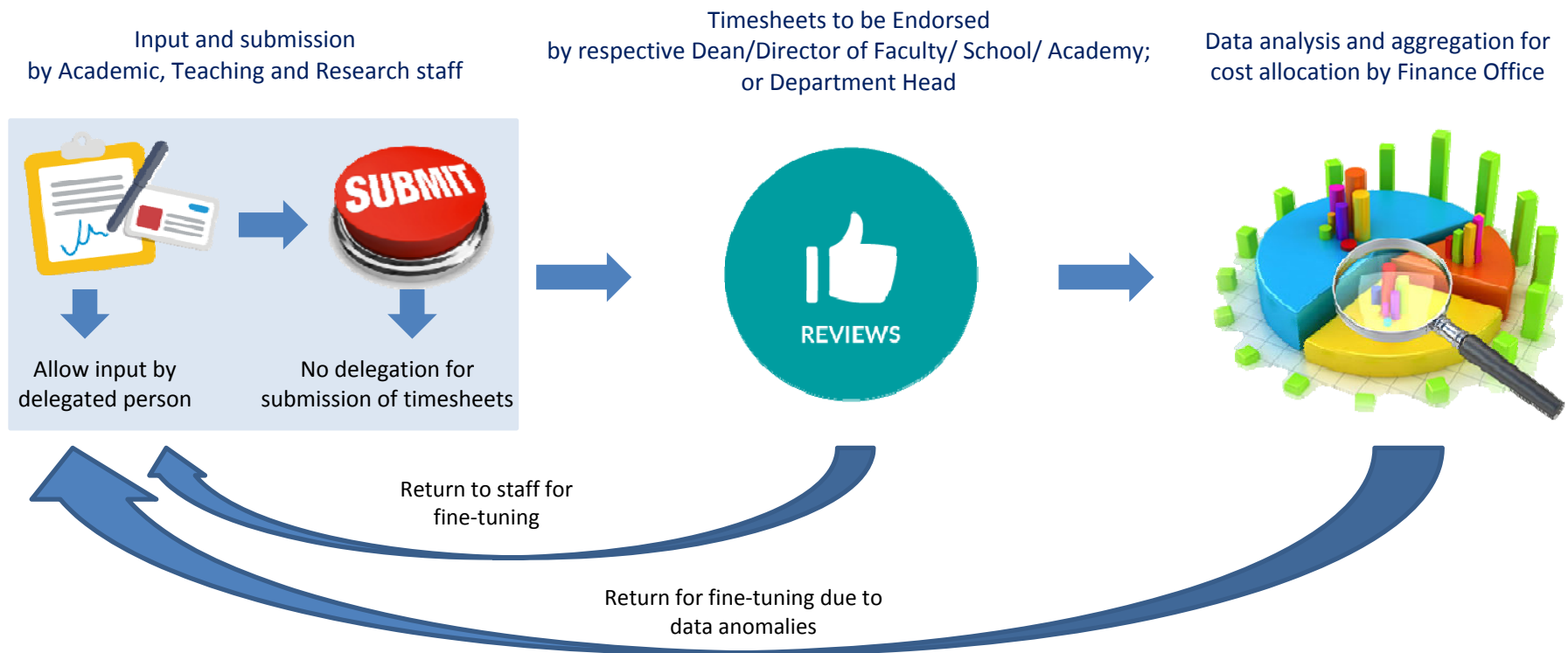
Tentative sampling approach to meet UGC requirements:

- Appoint a statistician to ensure representative sampling
- Sampling by rotation → Select 15-20% of total academic/teaching staff per sample (by staff [rank](#))
- 2-week duration for each timesheet input
- No standard working hours per week
- Conduct timesheet input 3 times a year (Oct, Nov and Mar)
- Sufficient documentation for UGC's inspection
- Timesheets require supervisor's endorsement

Implications

- Timesheet data will affect cost allocation to UGC and non-UGC funds
- Any unused UGC funds will be returned to UGC

Academic Online Timesheet System - Overview



CAG Requirements

- Timesheet for Academic, Teaching and Research Staff



Time spent on institutional activities that consume university resources



Activities such as holidays, leaves, private outside practices, etc.

Institutional Activities

Teaching*

Research and creative outputs

Other institutional activities

Institutional administration

Time Spent

UGC / Non UGC
Hours and %

Total Hours Only

Cost Allocation

UGC Fund
\$\$\$

Non-UGC Fund
\$



* Timetabling data such as lectures and tutorial classes will be extracted from Student Information System for review and confirmation

Demonstration on Academic Online Timesheet System

The screenshot displays the BU Portal University website. At the top, there is a navigation bar with links for SIGN OUT, HOME, and HKBU. The main header features the university's logo and name in both Chinese and English, along with a search bar. Below the header, a secondary navigation bar includes links for e-Announcements, Profile, Works, Share & Community, U-Wide Policies & Info, and Help. The user is logged in as Chan David T M, with a dropdown menu showing 'CHI - Individual Staff'. The main content area is divided into several sections: 'My Profile, Benefit & Finance', 'My Finance', 'My Profile', 'My Benefit', and 'My Timesheet'. The 'My Timesheet' section is highlighted with a red box and contains a link to 'Timesheet System' and a sub-link 'Timesheet'.



[Appendix](#)

CAG - Institutional Activities



Activities

Examples from CAG

Teaching

- Teaching / preparation of teaching materials
- Supervision of Research Postgraduates
- Course / programme planning and development
- Assessment and examination
- Student Contact / Supervision / Mentoring

Research and Creative Outputs

- Conduct research, write papers, reports, books, journals, creative arts, etc.
- Institutional contract research, knowledge transfer
- Research oriented conferences, seminars, exhibition, performance
- Supervision of research projects

Other Institutional Activities

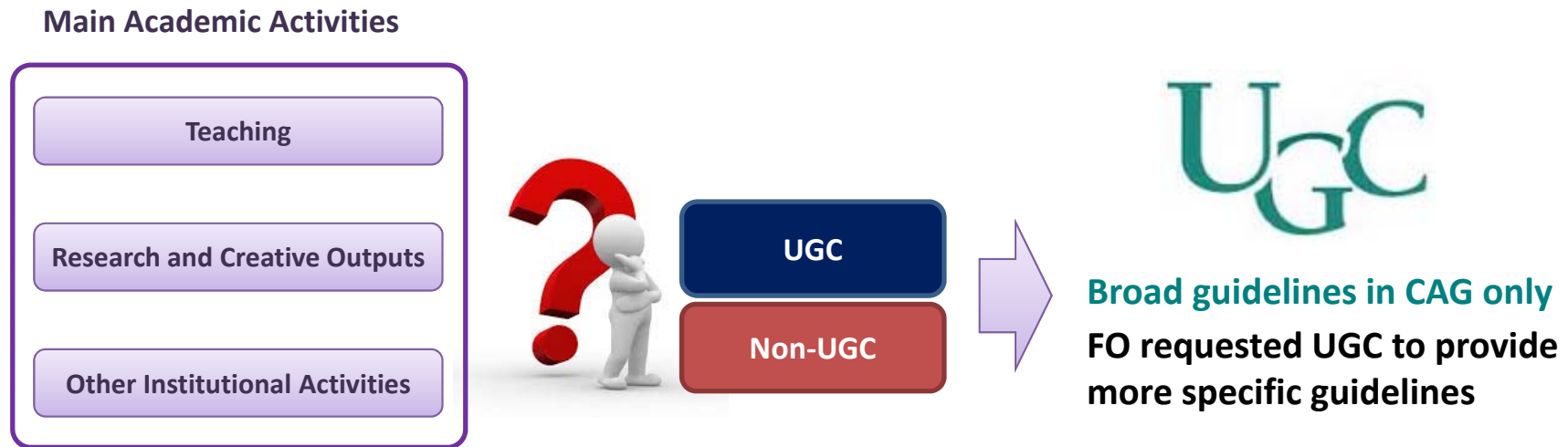
- Public services
- Consultancy*
- Outside practice*
- Clinical service*

** Activities for contract(s) entered into by HKBU*

Institutional Administration

- Internal meetings
- Administrative work such as serving as committee chairperson/member

CAG – How to classify UGC / Non-UGC activities?



UGC reiterated that

- CAGs are Principle-Based \neq Rule-Based
- NOT intend to cover exhaustive list of activities and treatment
- University should make **reasonable judgement** on treatment of activities



- FO will provide guidelines on common activities of HKBU
- Please email to FO for guidance if specific activities need clarification / judgement

CAG - Broad Classification for UGC / Non-UGC Activities

Teaching

- Number of UGC and Non-UGC registered students; *OR*
- Activities for UGC/Non-UGC funded programme



Research - Based on Fund Source with some Relaxation Rules

Research Projects Funded by

Block Grant

Matching Grant

Research Grant



Commercial Entities

Self-Funding



Research - Based on Funding Source with some *Relaxation Rules*

Research Projects Funded by



CAG - Broad Classification of UGC / Non-UGC Activities

Other Institutional Activities	Allocation basis
Public services	100% UGC
Consultancy	Classify as UGC activity, if the following conditions are met 1. Within “One Day per Week Arrangement”; <u>and</u> 2. NOT undertaking self-financed programmes / activities contracted with outside parties by HKBU
Service provided to hospitals / clinical service	
Outside practice	

UGC's guidance on UGC activities

- **Academic or profession-related activities**
 - without any compensation (excluding honorarium or reimbursement of expenses)

Interviews by news media



Serving as a representative of the University to attend conference / forum organized by external bodies

UGC Response

- *Assuming that the activities would consume the university's resources which should be aligned with the definition of "Institutional Activities"*

Reasonable Judgement/Interpretation by FO

- **Public Services → 100% UGC**

UGC's guidance on UGC activities

- UGC-fundable activities supported by non-UGC funds



UGC Response

- *Can be classified as UGC activities*

Questions & Answers



What's Next?

Academic Online Timesheet System

Activities	Time Schedule	Parties
System Integration Testing with Cost Allocation Platform	July to Aug 2017	Project Team, Deloitte and ITO
User Acceptance Test and Trial Run on Timesheet System	Oct 2017 (Tentative)	Select a sample of Academic, Teaching and Research Staff to fill in timesheet
Compliance of UGC requirement for CAG	Start in July 2018	Academic, Teaching and Research Staff to fill in timesheet

Change Management and Department Support Team on CAG

Name

Post



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We need your Kind Support & Cooperation

Thank You



Staff required to complete the Time Analysis Survey

Appendix 1

Staff Rank
1. Academic (Professorial Staff)
2. Lecturers and Instructors
3. Research Assistant Professor, Research Associate, Research Assistant

P/VC, Provost, VPs, AVPs, Deans and Directors are deemed as senior management by CAG and not required to fill in timesheets



Appendix

Timesheet Summary

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SAMPLE

STRICTLY CONFIDENTIAL

PURPOSE OF THIS FORM:
 The data collected from this form is ONLY used in the Cost Allocation Guidelines (CAG) model for allocating academic staff costs to UGC / non-UGC activities. Please note that individual timesheet data remains confidential and the timesheet is NOT connected with any performance evaluation.

Timesheet : Summary
[Submit](#)

Staff ID	: 991101	Timesheet Date	: 05/06/2017 to 18/06/2017
Staff Name	: Chan Tai Man	Deadline	: 30/06/2017 (Fri)
Faculty / Department / Unit	: CHI	Total Hours	: 31.0
Post Title Code	: L - Lecturer	UGC Hours / Non-UGC Hours	: 27.0 / 2.0
		Institutional Administration Hours	: 2.0

Instructions!
ATTENTION: EXCLUDE private time (such as holidays, leaves) and those activities with contract NOT entered by HKBU

[Next 7 days](#)

05/06/2017 Mon Total Hours 8.0 View	06/06/2017 Tue Total Hours 9.0 View	07/06/2017 Wed Total Hours 8.0 View	08/06/2017 Thu Total Hours 6.0 View	09/06/2017 Fri Total Hours 0.0 View	10/06/2017 Sat Total Hours 0.0 View	11/06/2017 Sun Total Hours 0.0 View
-Research & Creative Outputs: 8.0	-Teaching: 7.0 -Other Institutional Activities: 2.0	-Teaching: 6.0 -Institutional Administration: 2.0	-Teaching: 1.0 -Research & Creative Outputs: 4.0 -Other Institutional Activities: 1.0			

Appendix

Timesheet Input Form

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SAMPLE

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HELP

PURPOSE OF THIS FORM:
The data collected from this form is ONLY used in the Cost Allocation Guidelines (CAG) model for allocating academic staff costs to UGC / non-UGC activities. Please note that individual timesheet data remains confidential and the timesheet is NOT connected with any performance evaluation.

Timesheet : Input Form

Save Timesheet Summary

Staff ID : 991101

Staff Name : Chan Tai Man

Faculty / Department / Unit : CHI

Post Title Code : L - Lecturer

Timesheet Date : 08/06/2017 (Thu)

Deadline : 30/06/2017 (Fri)

Total Hours : 6.0

UGC Hours / Non-UGC Hours : 6.0 / 0.0

Institutional Administration Hours : 0.0

[Instructions!](#)
ATTENTION: EXCLUDE private time (such as holidays, leaves) and those activities with contract NOT entered by HKBU

Select	Category	Activity	Course Code	UGC (note1)	Non-UGC (note 1)	Total Hours Worked (note2)	UGC Hours	Non-UGC Hours
<input type="checkbox"/>	Teaching	Timetable from Student Inf. Sys.	CHIL4005-10001(16:30-17:20)	100%	0%	1.0	1.0	0.0
<input type="checkbox"/>	Research & Creative Outp	Research & Experimental Developn		100%	0%	4.0	4.0	0.0
<input type="checkbox"/>	Other Institutional Activities	Outside Practice		100%	0%	1.0	1.0	0.0

Note:

- The UGC and non-UGC ratios per course are calculated based on the student enrollment record extracted from Student Information System as at snapshot date (For enquiry, please contact Finance Office).
- Rounded to the nearest 0.5 hour.


 Timetable data will be interfaced from Student Information System (SIS)

Endorse Timesheet

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PURPOSE OF THIS FORM:
The data collected from this form is ONLY used in the Cost Allocation Guidelines (CAG) model for allocating academic staff costs to UGC / non-UGC activities. Please note that individual timesheet data remains confidential and the timesheet is NOT connected with any performance evaluation.

Timesheet : Endorsement [Return To Preparer](#) [Endorse](#)

Timesheet Period : 05/06/2017 to 18/06/2017
Deadline : 30/06/2017 (Fri)
Faculty / Department / Unit :

Select	Faculty/ Dept/Unit	Post Title Code	Staff Name	Preparer Created By/ Create Date	Preparer Submit By/ Date	Endorse By/ Date	
<input type="checkbox"/>	CHI	L	Chan Tai Man	Chan Tai Man 05/06/2017 10:39	Chan Tai Man 06/06/2017 15:11		
<input type="checkbox"/>	CHI	L	Lee Siu Yee	Lee Siu Yee 05/06/2017 18:14	Lee Siu Yee 06/06/2017 15:11		

Timesheet Report Details

Hong Kong Baptist University									
Timesheet Details									
STRICTLY CONFIDENTIAL									
Staff ID	991101				Timesheet Period		: 05/06/2017 To 18/06/2017		
Staff Name	Chan Tai Man				Deadline		: 30/06/2017 (Fri)		
Faculty / Department / Unit	CHI - Department of Chinese Language				Total hours		: 31.0		
Post Title Code	L - Lecturer				UGC Hours / Non-UGC Hours		: 27.0 / 2.0		
					Institutional Administration Hours		: 2.0		
					(rounded to the nearest 0.5 hour)				
Date	Category	Activity	Course code	UGC (in ratio)	Non-UGC (in ratio)	Total Hours Worked	UGC Hours	Non-UGC Hours	Remarks
05-06-17	Research & Creative Outputs	Research & Experimental Development		100%	0%	7.0	7.0	0.0	
	Research & Creative Outputs	Supervise Research Staff / Project		100%	0%	1.0	1.0	0.0	
06-06-17	Teaching	Timetable from Student Inf. Sys.	CHIL4005-1 (15:30-17:20)	100%	0%	2.0	2.0	0.0	
	Teaching	Teaching / Class Preparation		100%	0%	5.0	5.0	0.0	
	Other Institutional Activities	Public Services		100%	0%	2.0	2.0	0.0	
07-06-17	Teaching	Timetable from Student Inf. Sys.	CHIL1006 (11:30-13:20)	100%	0%	2.0	2.0	0.0	
	Teaching	Delivery of Teaching		0%	100%	2.0	0.0	2.0	
	Teaching	Supervise Research Postgraduates		100%	0%	2.0	2.0	0.0	
	Institutional Administration	Internal Meeting				1.0	0.0	0.0	
08-06-17	Teaching	Timetable from Student Inf. Sys.	CHIL4005-10001 (16:30-17:20)	100%	0%	1.0	1.0	0.0	
	Research & Creative Outputs	Research & Experimental Development		100%	0%	4.0	4.0	0.0	
	Other Institutional Activities	Outside Practice		100%	0%	1.0	1.0	0.0	
	Institutional Administration	Internal Meeting				1.0	0.0	0.0	Timesheet System Demo by FO
Total hours : Institutional Activity						29.0	27.0	2.0	
Institutional Administration						2.0			
Grand Total						31.0			

*** End of Report ***

SAMPLE

Timesheet Report For Deans / Department Heads

Print date & time: 8/6/2017 13:20:00

Hong Kong Baptist University Department Timesheet Summary

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Timesheet period : From 5/6/2017 To 18/6/2017
 Faculty : Faculty of Arts
 Department : CHI - Department of Chinese Language

Expressed in hour(s)

Staff ID	Staff Name	Post Title	Total = T+R+O+A	Subtotal = T+R+O		Institutional Administration (A)*	Teaching (T)		Research (R)		Other Institutional Activities (O)	
			Total	UGC	Non-UGC		UGC	Non-UGC	UGC	Non-UGC	UGC	Non-UGC
991101	Chan Tai Man	L - Lecturer	31.0	27.0	2.0	2.0	12.0	2.0	12.0	0.0	3.0	0.0
991102	Lee Siu Yee	L - Lecturer	27.0	15.0	8.0	4.0	5.0	5.0	10.0	0.0	0.0	3.0
				<i>a</i>	<i>b</i>							
Total Hours			58.0	42.0	10.0	6.0	17.0	7.0	22.0	0.0	3.0	3.0
Total %				80.8%	19.2%							
				$= a' / (a+b)$	$= b' / (a+b)$							

* - allocate based on the UGC/non-UGC ratios for time spent on Teaching, Research and Other Institutional Activities

*** End of Report ***

SAMPLE