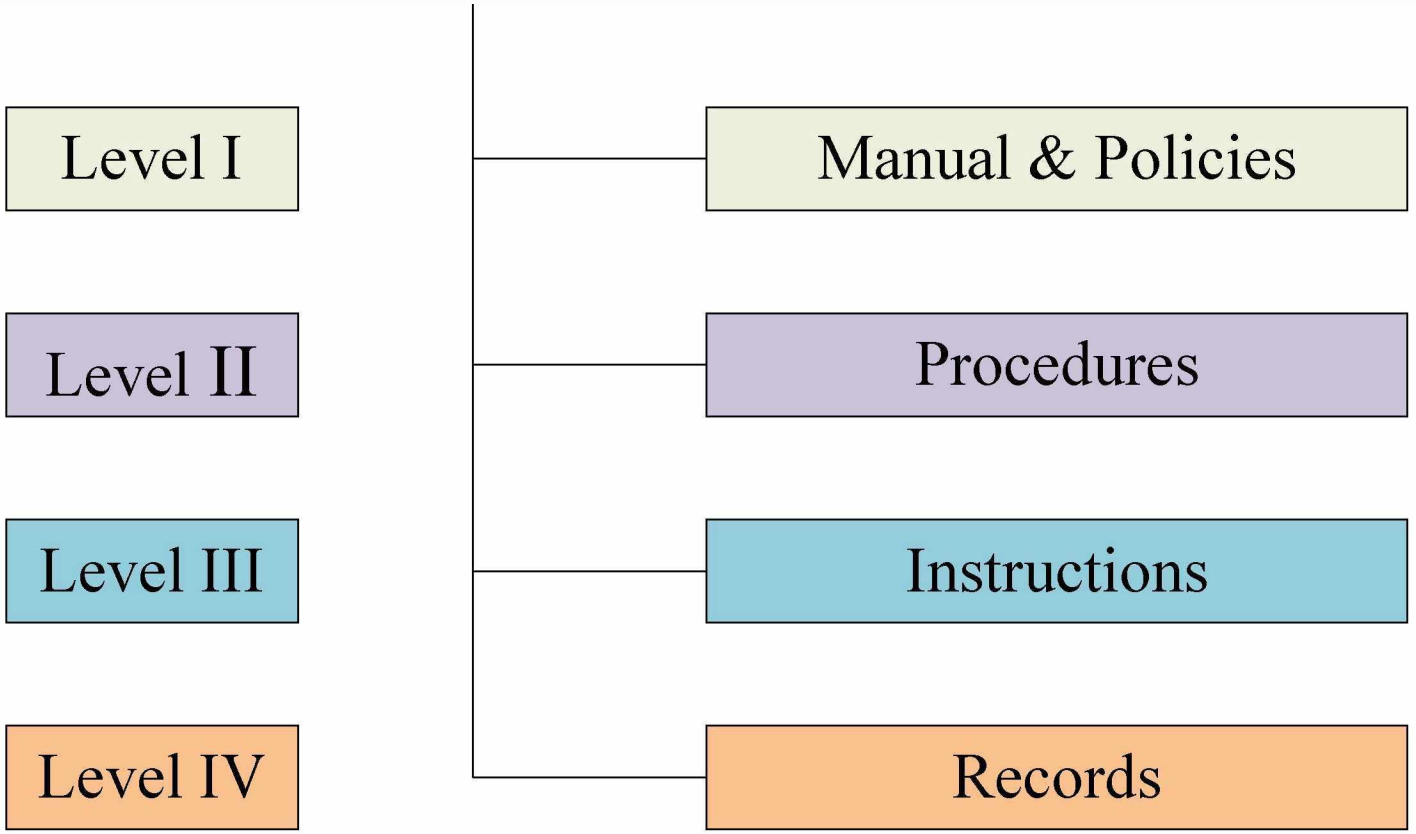
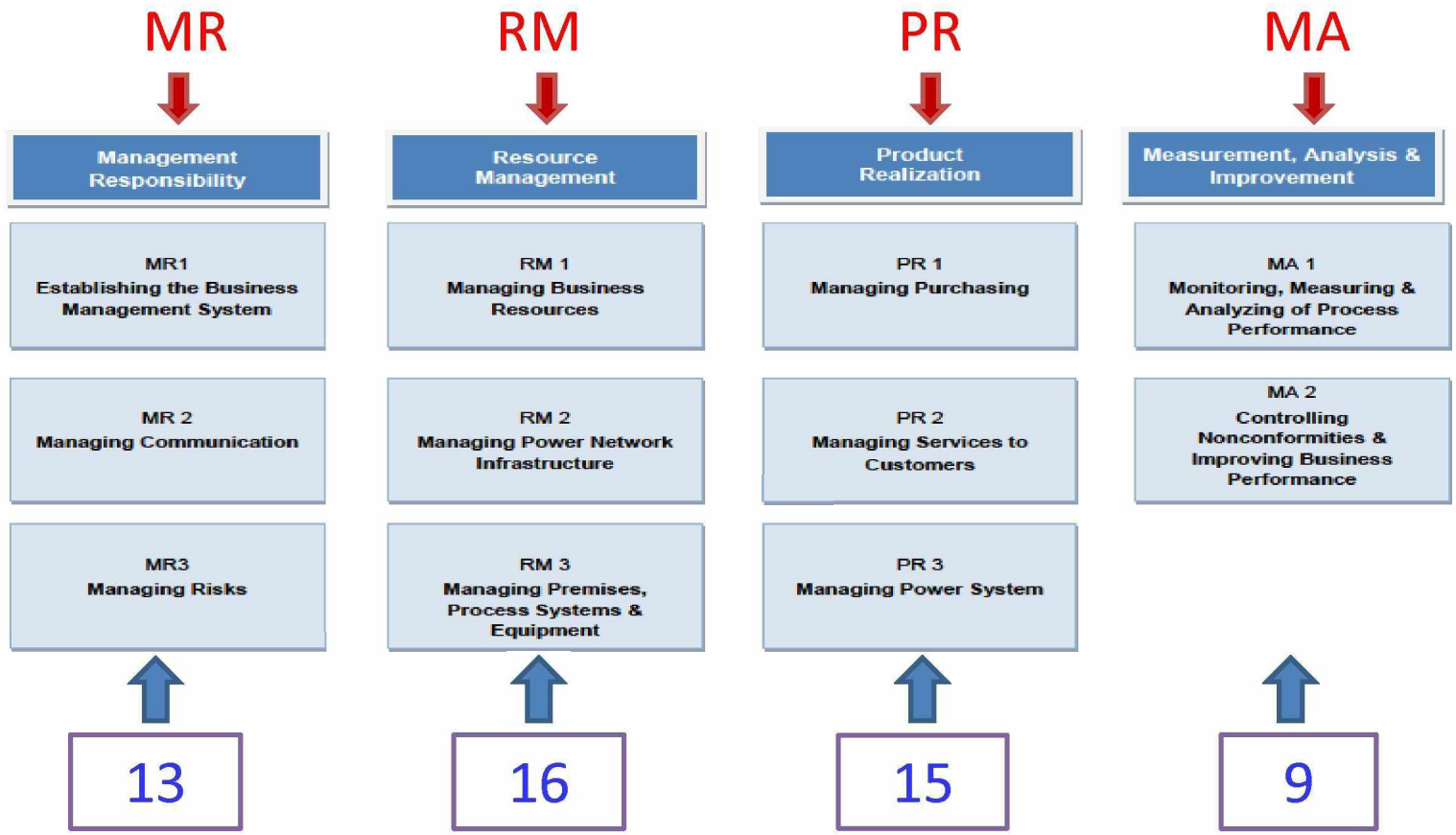
IMS Document Library

IMS Document Structure

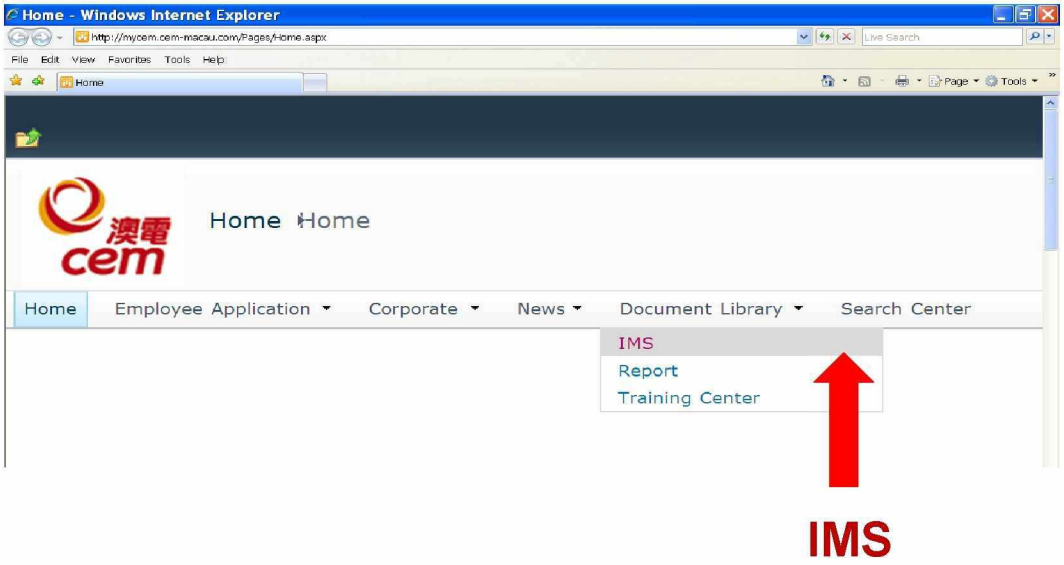


IMS document structure is constructed based on the ISO9001 Quality Management Standard Requirements, which contains 4 main processes namely MR, RM, PR and MA. The IMS documents are arranged in according to **CEM Process List.**

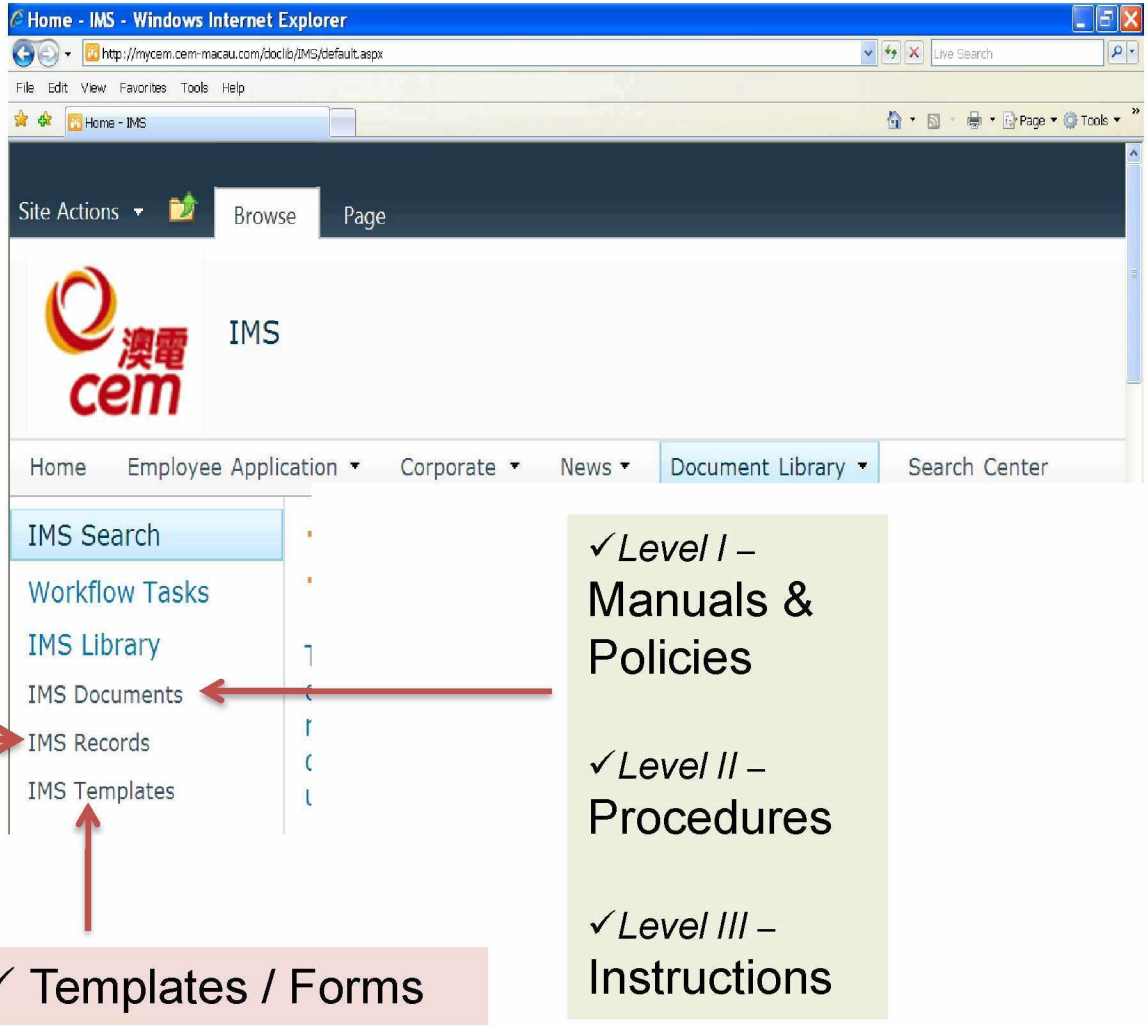


Access to IMS Documents

MyCEM → Document Library → IMS



Access to IMS Documents



✓*Level IV*
Records

✓ Templates / Forms

✓*Level I* –
Manuals & Policies

✓*Level II* –
Procedures

✓*Level III* –
Instructions

Quick ways to find a document in IMS Library

- *Go to the "IMS Process" if you know the process where the document is allocated*
- *Use Filter function from "Issuer" if the document belongs to a specific area, i.e. GED/TSV/LAB, DSF/CNT, CSD/CCC*
- *Use Filter function from "Content Type" if you know the type of document, i.e. manual, policy, procedure*
- *Use Search function if you know the key words of document*

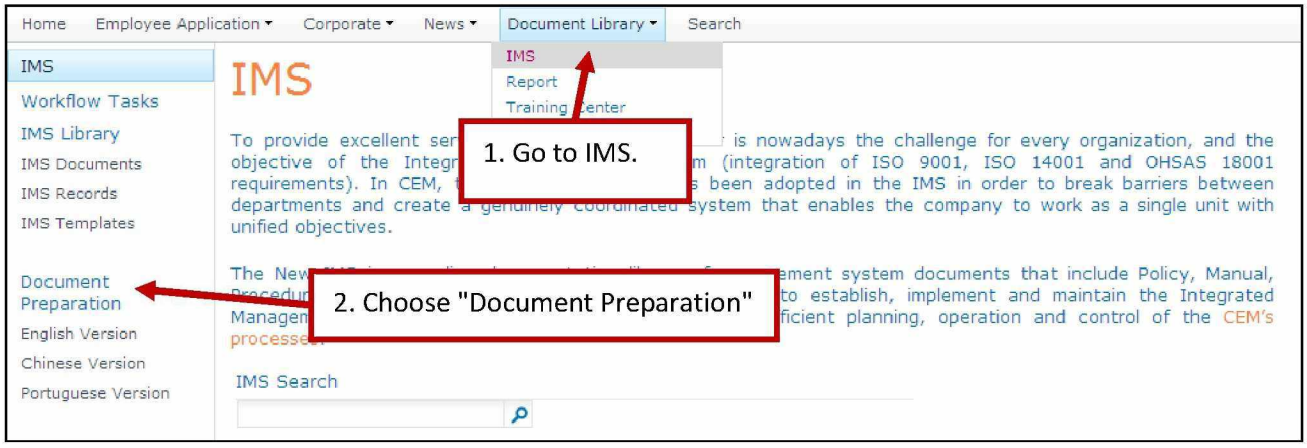
1 – Add New IMS Instruction to IMS Library

IMS Library

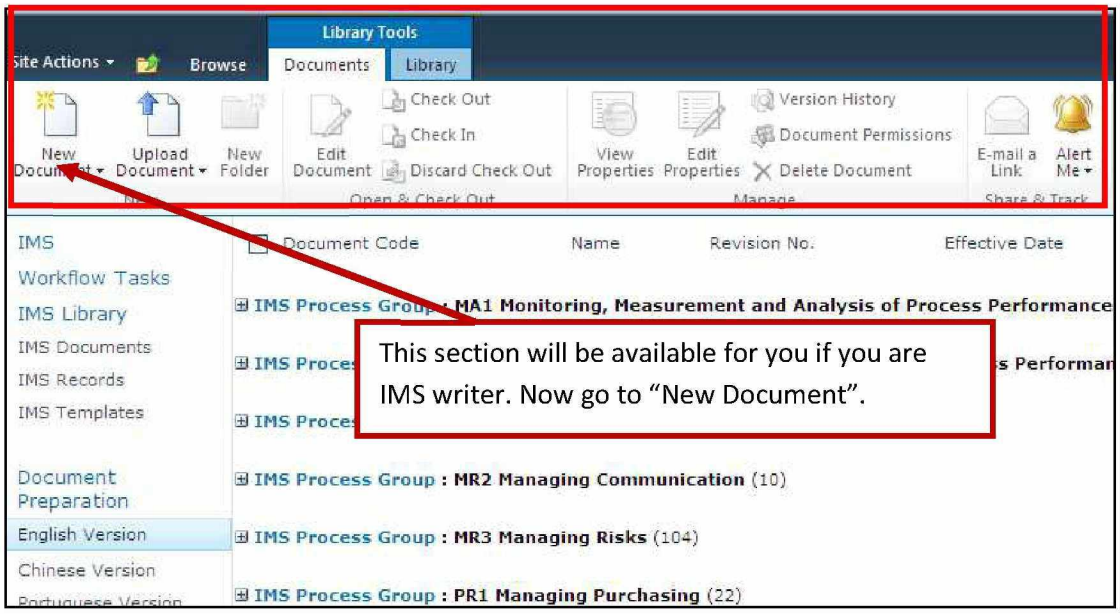
Frequent Asked Questions

Q: How to add new IMS Instruction to IMS Library?
A: You need to be an authorized IMS writer. If you aren't, kindly create a log in Online HelpDesk (Application: IMS) to be granted this access. For some departments you may need the approval of Senior Manager to be an IMS writer.

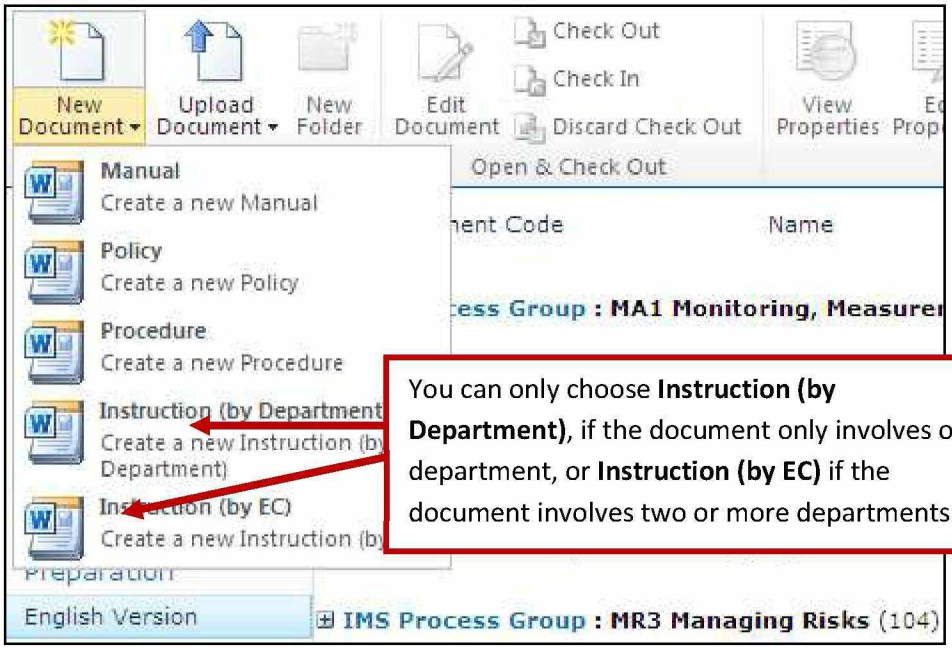
1. Then go to IMS:



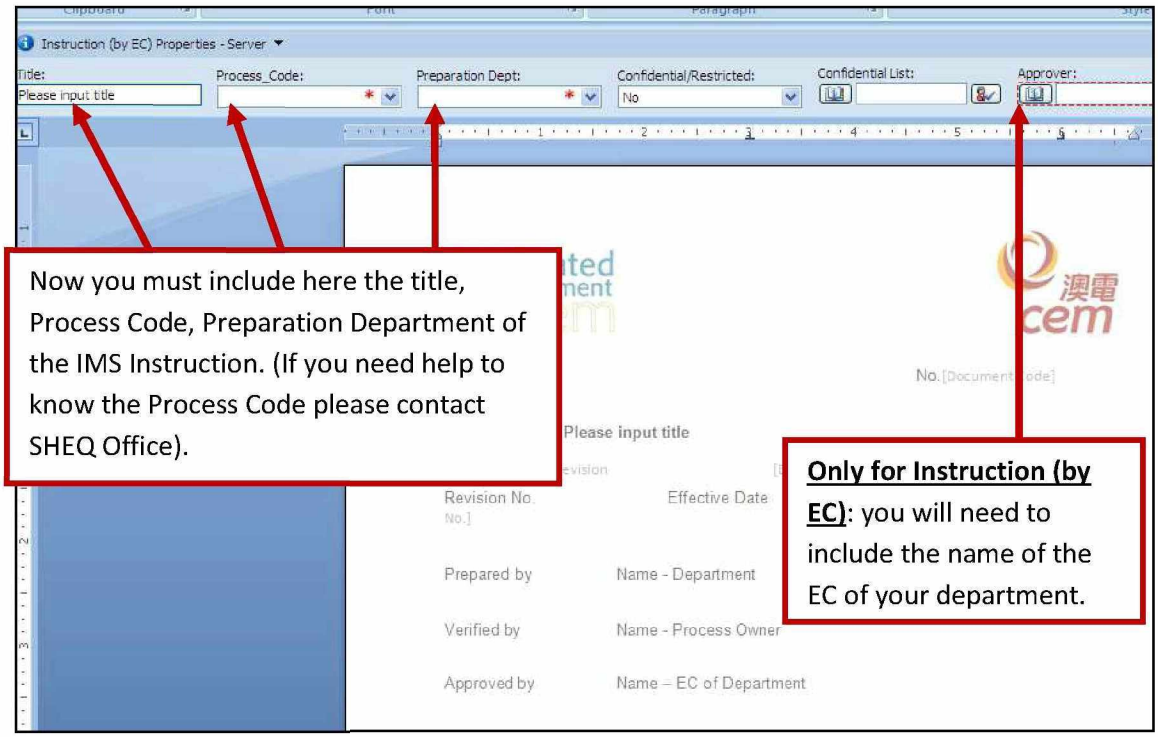
2. You will go to this window:



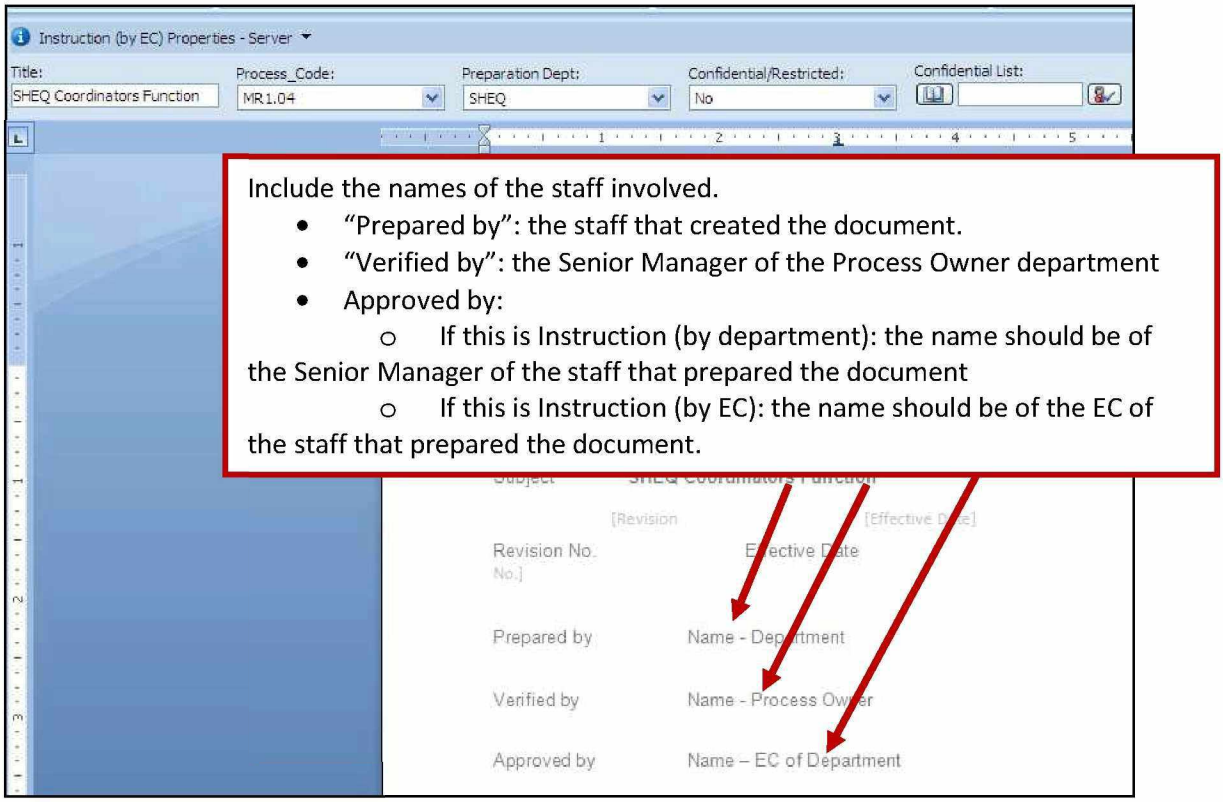
3. You can choose 5 categories of IMS documents, however there only two options for the IMS writer:



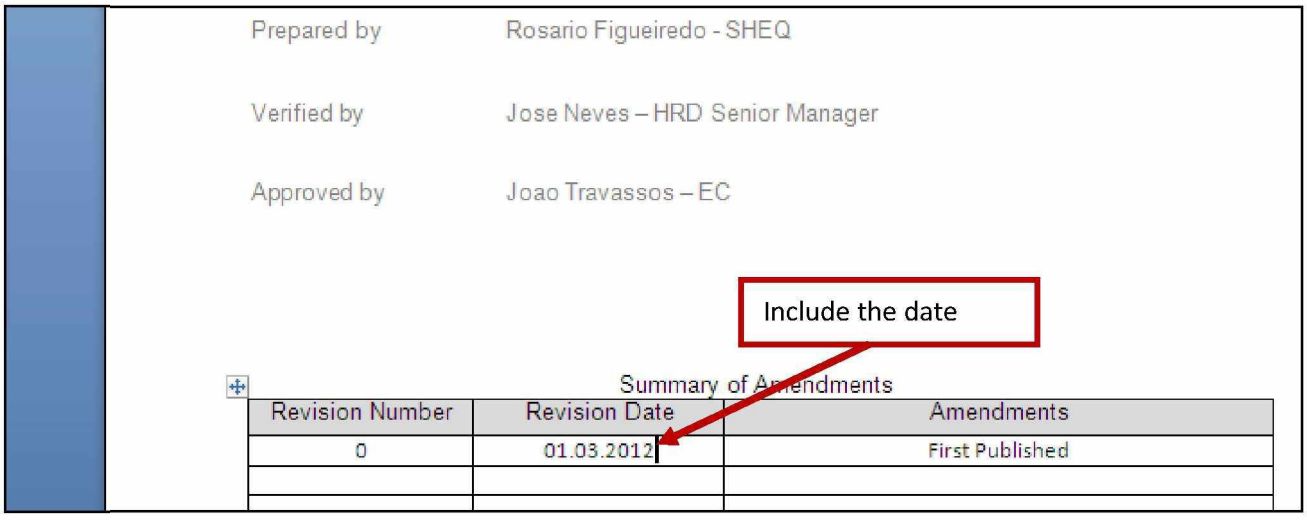
4. After you choose the correct type of Instruction template, you will go here:



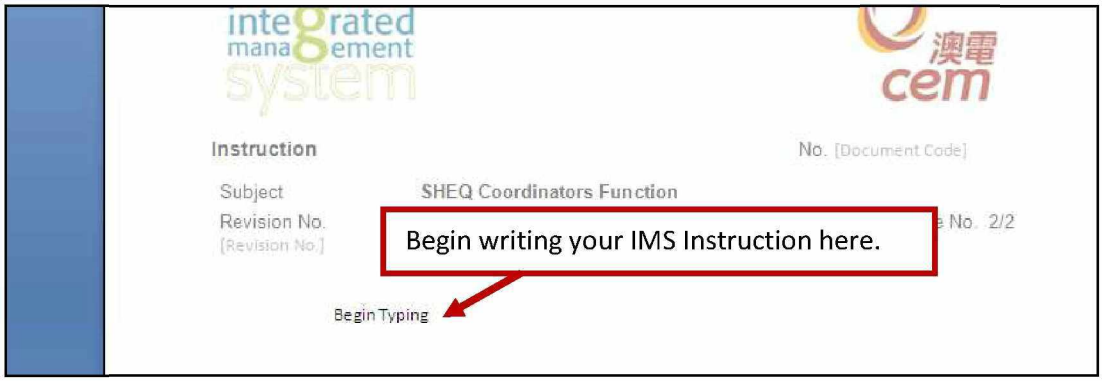
5. Now input the names of the staff involved in the preparation, verification and approval of the IMS document.



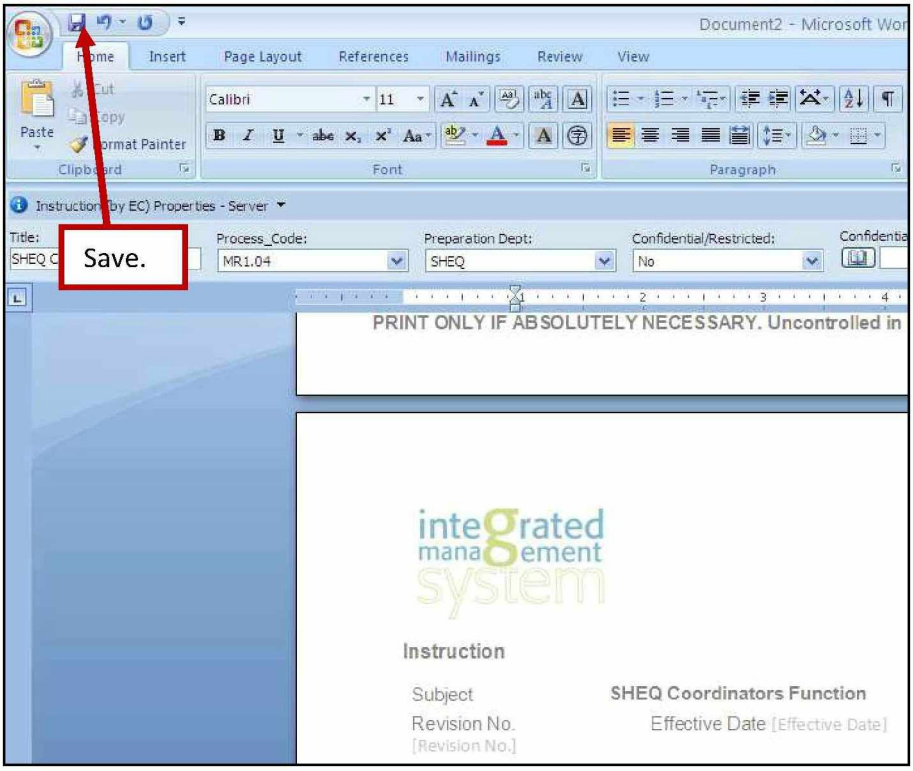
6. Now include the date here:



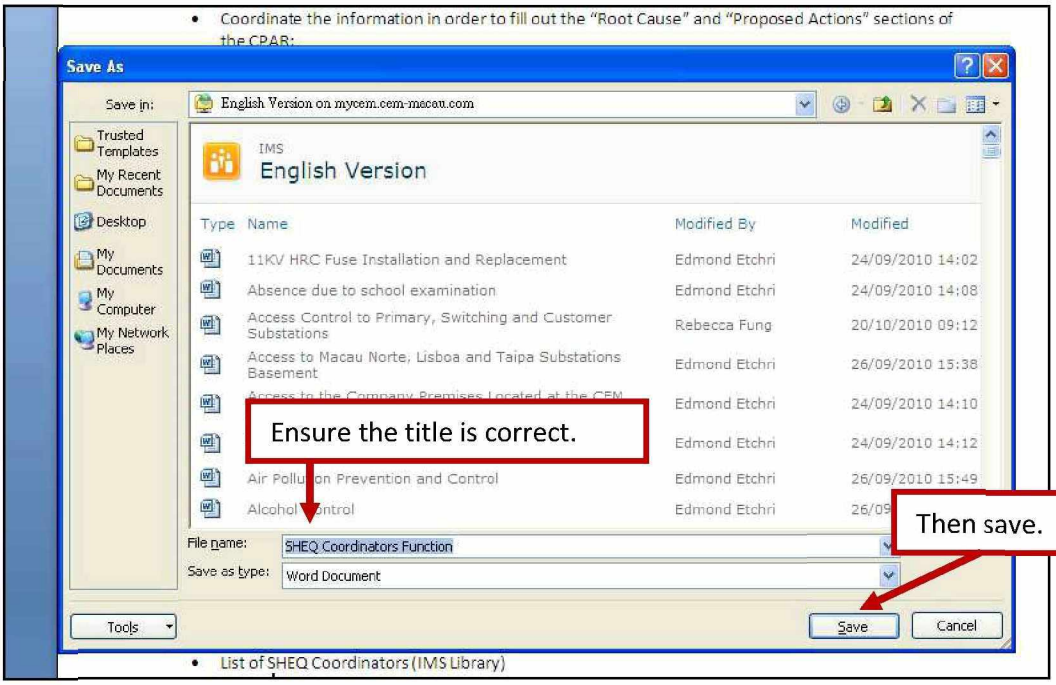
7. Go to the second page and add you document content:



8. After you finish, save your document:

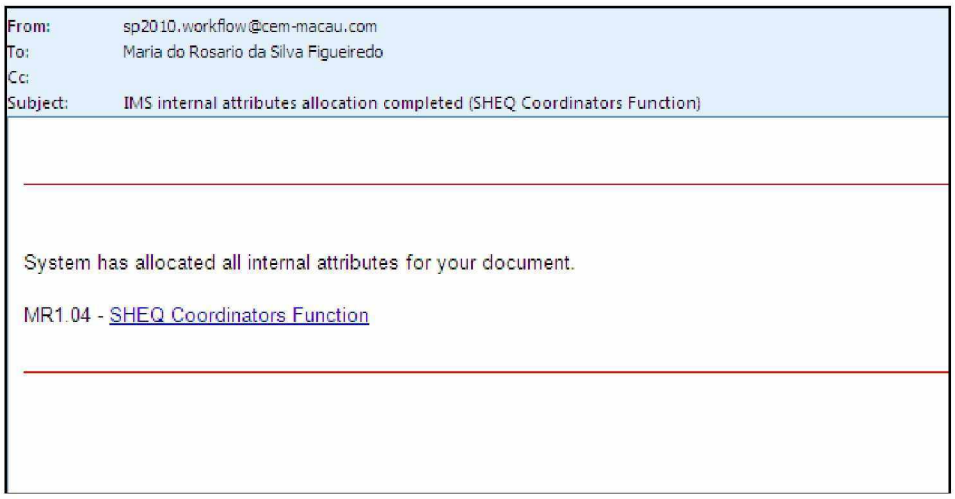


9. This window will open:

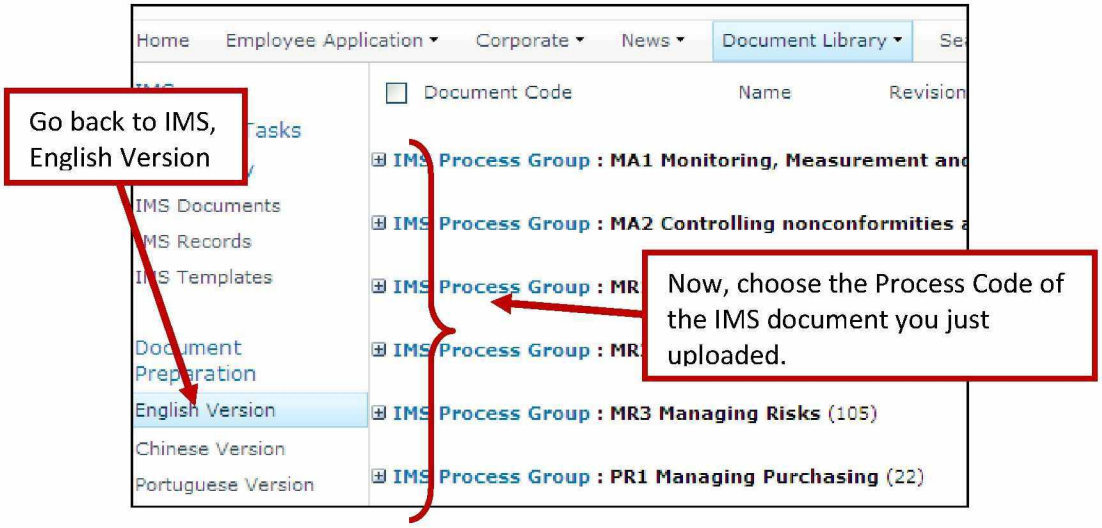


10. Now close your document. You have finished uploading your document.

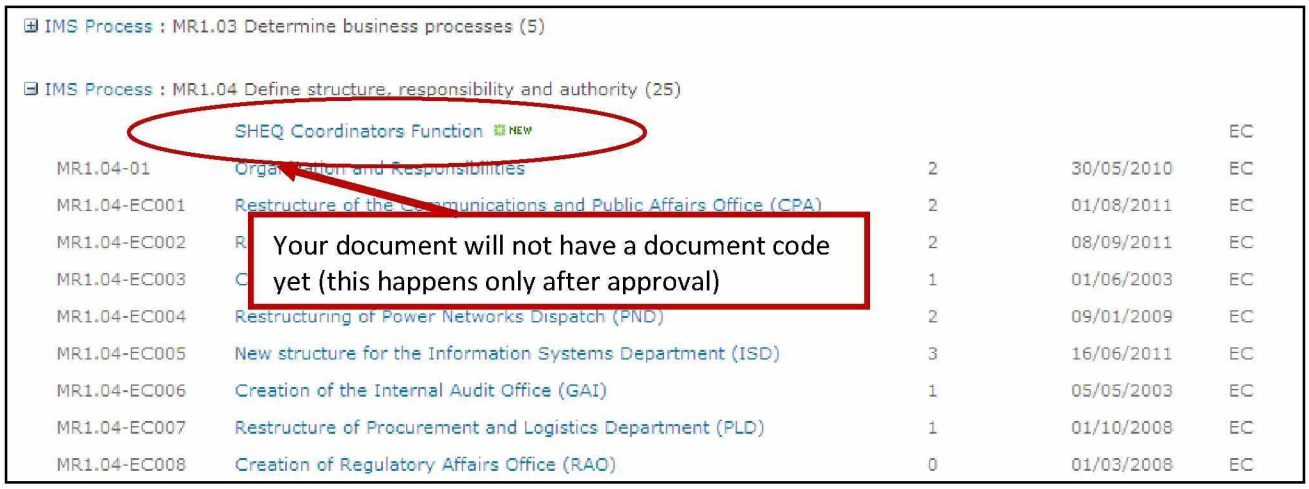
After a few minutes, you will receive an email notification in your Outlook.



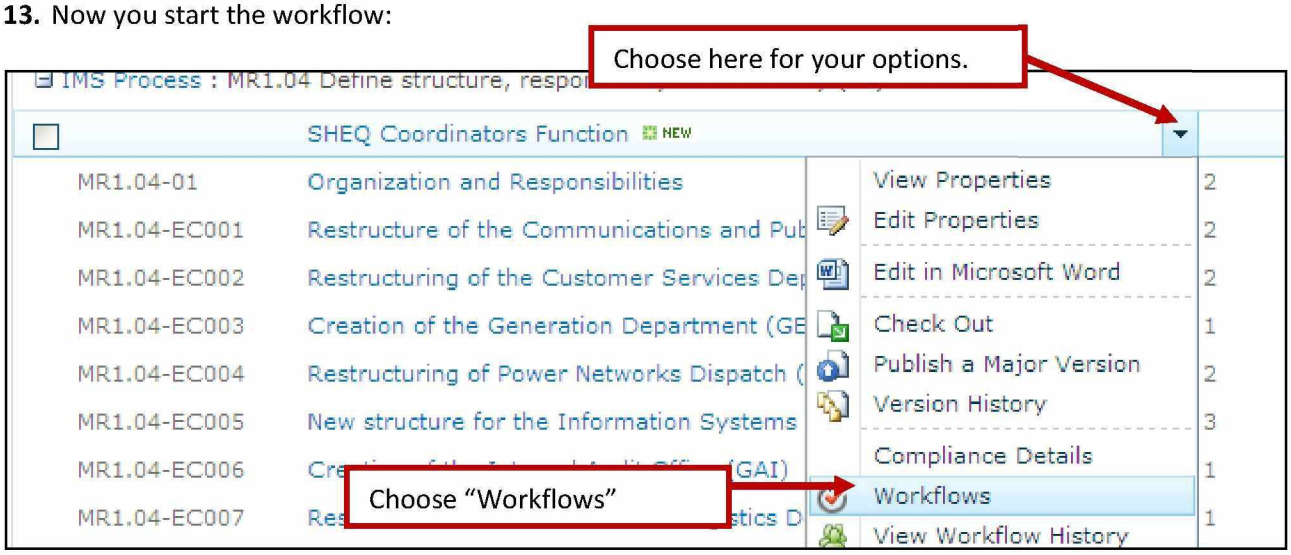
11. So now you must start the workflow for approval of the document. It is still possible to request comments from colleagues if you like.



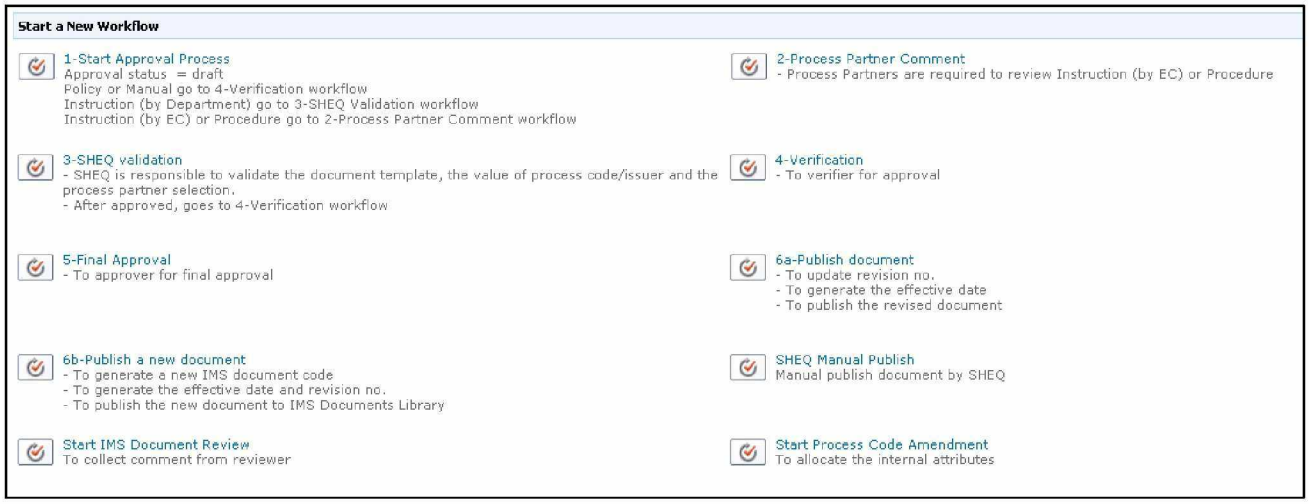
12. Find your document:



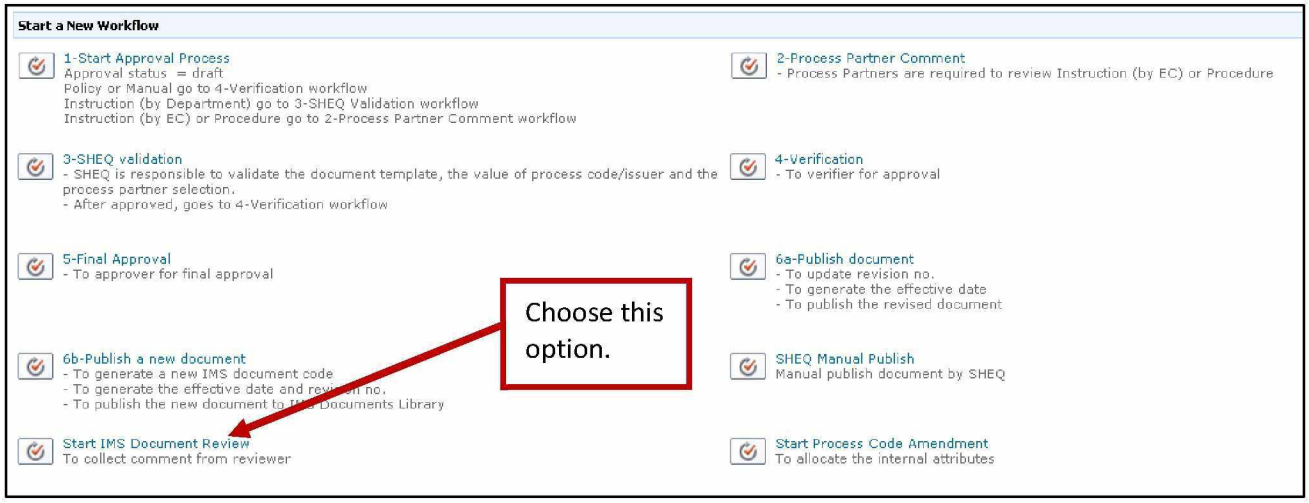
13. Now you start the workflow:



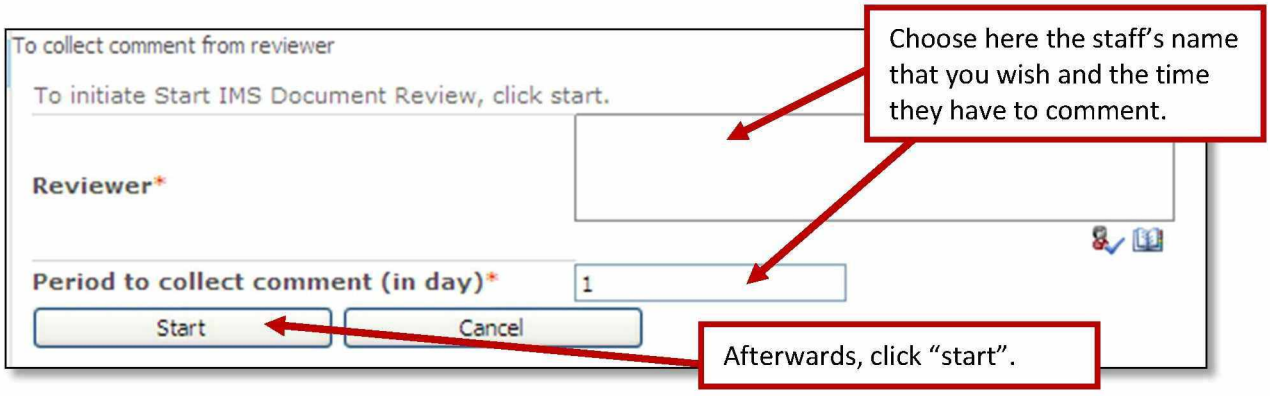
14. This window will appear:



15. Do you want comments from colleagues? If yes, please see the next step. If not, go to step 21.

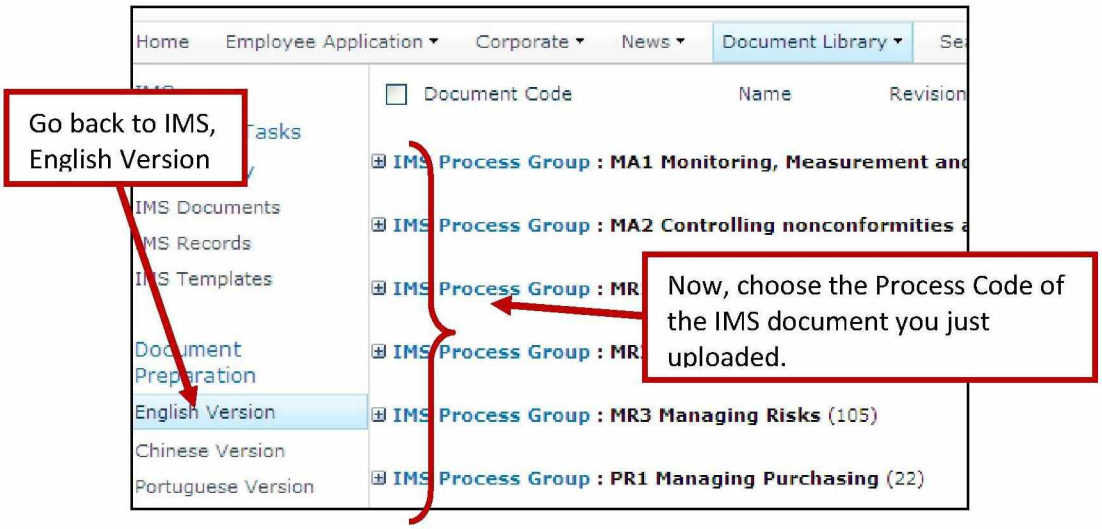


16. Then:

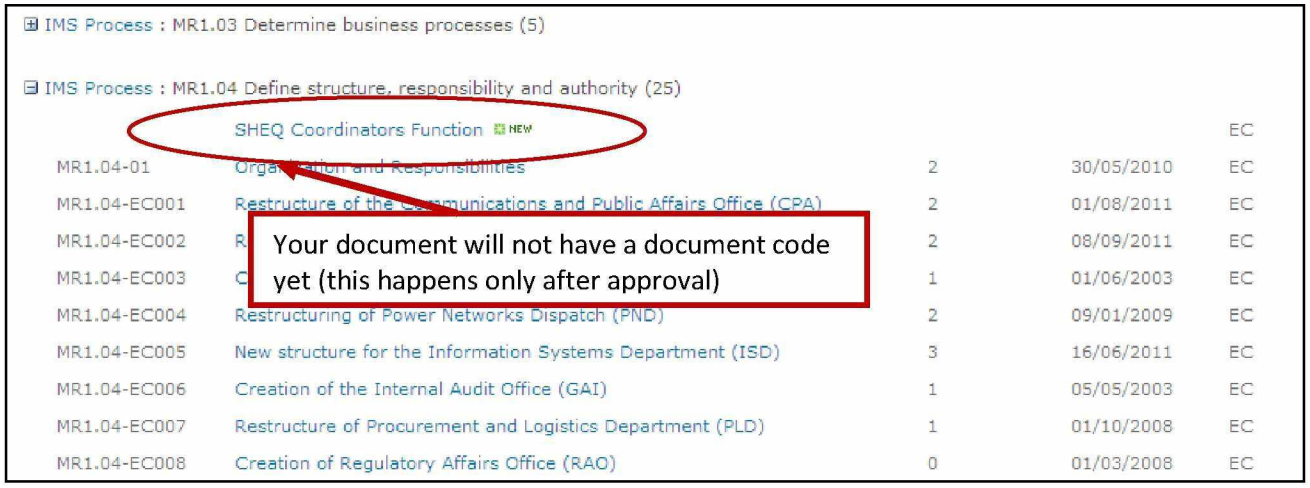


17. Now close your document. After a few minutes, you will receive an email notification in your Outlook.

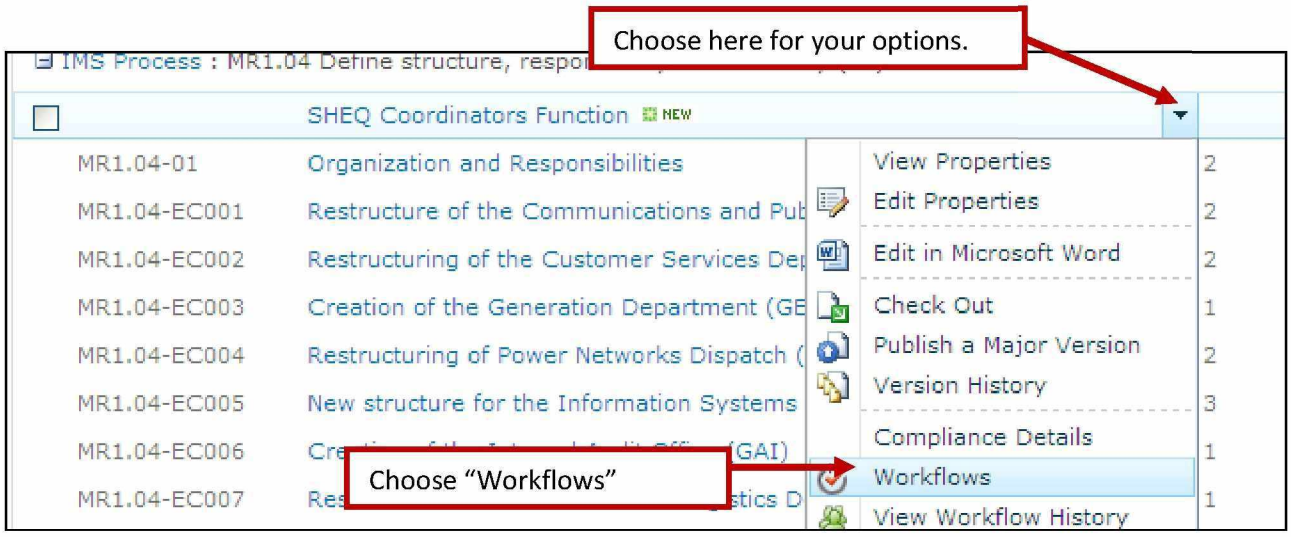
18. After the colleagues comment your document, you will receive another email notification. So now you must start the workflow for approval of the document.



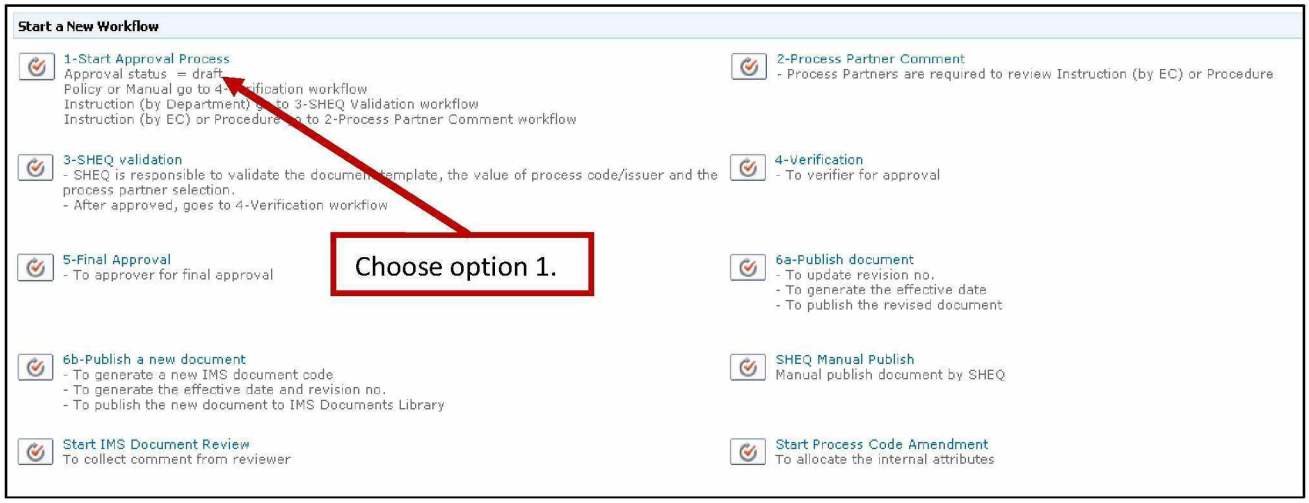
19. Find your document:



20. Now you start the workflow:



21. This window will appear:



22. Then:



23. The workflow will start and you will receive an Outlook email notification for each step of the way.

2 – Revision of IMS Instructions

修改綜合管理系統指引
Revision of IMS Instructions

此位置可找到"MA1.05-01 管理系統審核"用戶指導的例子。 We will use the document "MA1.05-01 Management System Audit" as an example for this User Guide.

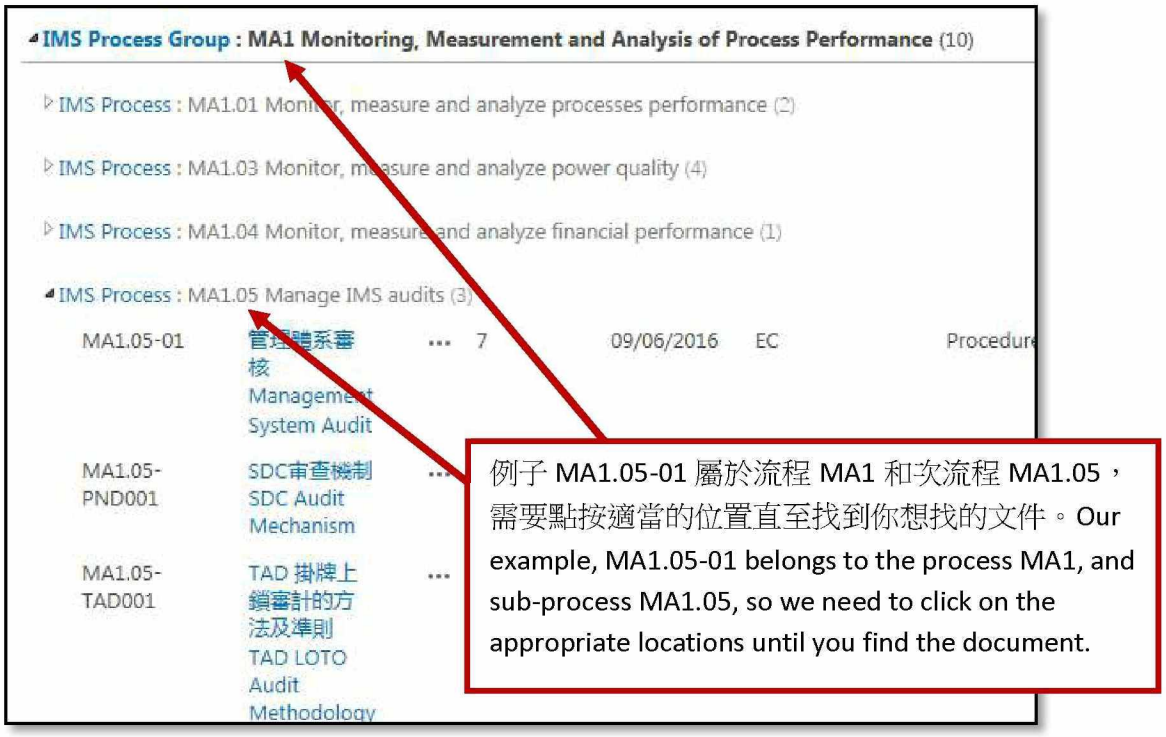
1. 去 MyCEM： Go to MyCEM:



2. 然後：Then:



3. 點選綜合管理系統內相關的流程：Choose the process where the IMS Instruction is inserted:



4. 然後：Then:

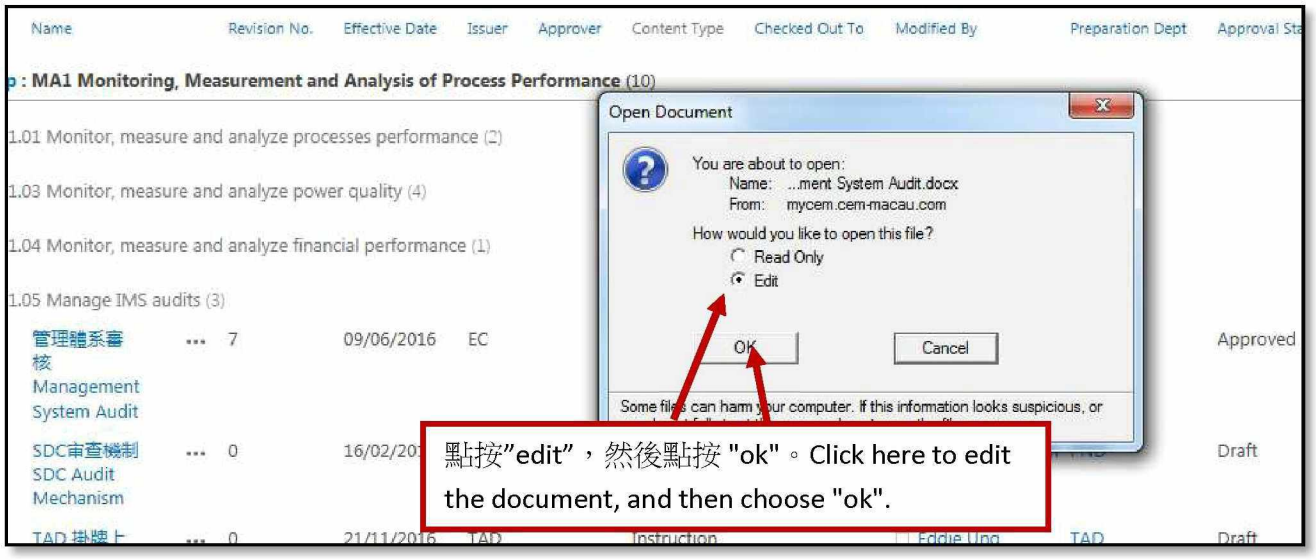


5. 如文件標題不是雙語，發電郵到 HRS/SUS (Kelvin.Kou@cem-macau.com)，要求製作此文件的雙語範本。製作後會收到通知，去步驟 6。If the title of the document is not bilingual (if it doesn't have both the Chinese and English titles), then please send an email to HRS/SUS (Kelvin.Kou@cem-macau.com) requesting the bilingual template for this document. After they do this, they will notify you and you can go to step 6.

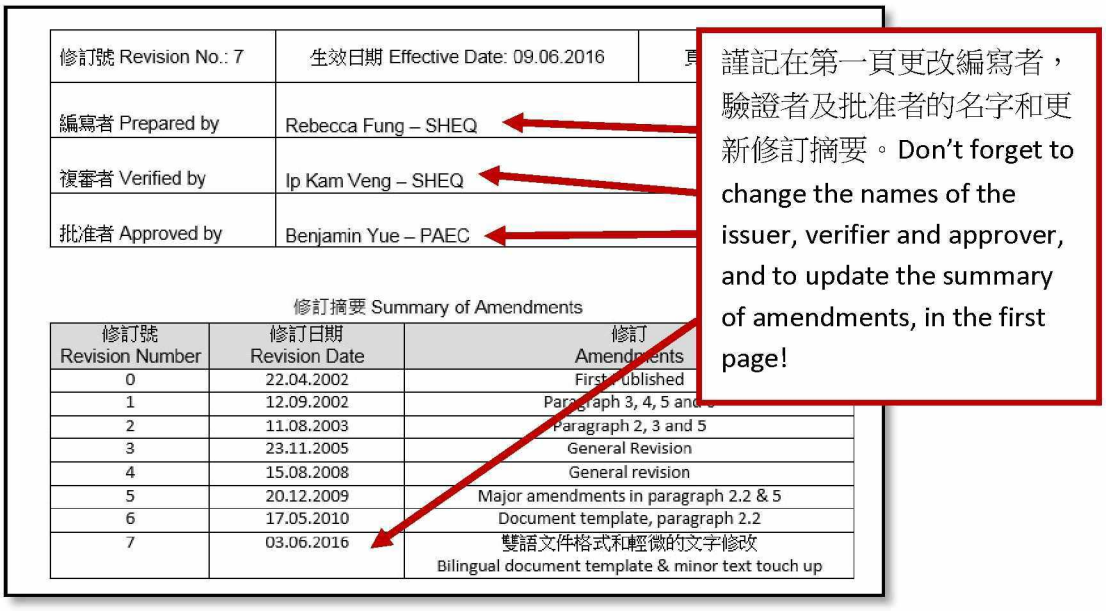
6. 點按想修改的文件。Click the document you want to revise.



7. 此視窗會出現。This window will appear.



8. 文件出現後可進行修改：You will go to the document and can start doing your changes:



修訂號 Revision No.: 7	生效日期 Effective Date: 09.06.2016	頁
編寫者 Prepared by	Rebecca Fung – SHEQ	
複審者 Verified by	Ip Kam Veng – SHEQ	
批准者 Approved by	Benjamin Yue – PAEC	

謹記在第一頁更改編寫者，驗證者及批准者的名字和更新修訂摘要。Don't forget to change the names of the issuer, verifier and approver, and to update the summary of amendments, in the first page!

修訂摘要 Summary of Amendments

修訂號 Revision Number	修訂日期 Revision Date	修訂 Amendments
0	22.04.2002	First published
1	12.09.2002	Paragraph 3, 4, 5 and
2	11.08.2003	Paragraph 2, 3 and 5
3	23.11.2005	General Revision
4	15.08.2008	General revision
5	20.12.2009	Major amendments in paragraph 2.2 & 5
6	17.05.2010	Document template, paragraph 2.2
7	03.06.2016	雙語文件格式和輕微的文字修改 Bilingual document template & minor text touch up

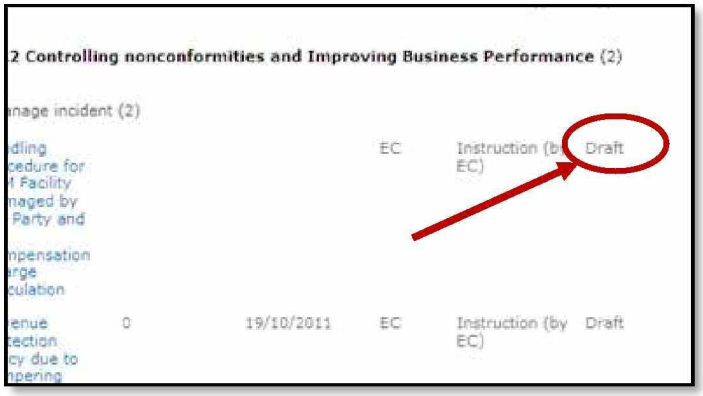
9. 請於修改時謹記：Do the revision in the text. Don't forget:

a. 倘若只有少部份需要修改，請把修改內容以藍色斜體字體(只是文件內容，不是修訂摘要)，並把修改的章節敍述於第一頁的修訂摘要內。If there are few sections to revise, the updated text must be blue italic (just the content of the Instruction, not the Summary of Amendments), and please state the paragraphs revised in the "Summary of Amendments" (1st page);

b. 如需大幅修改，所有內容皆為正常字體及黑色，並在第一頁的修訂摘要內列明"一般修改"。If the revisions are extensive, then all text should be normal font and black, and please write "General Revision" in the "Summary of Amendments" (1st page).

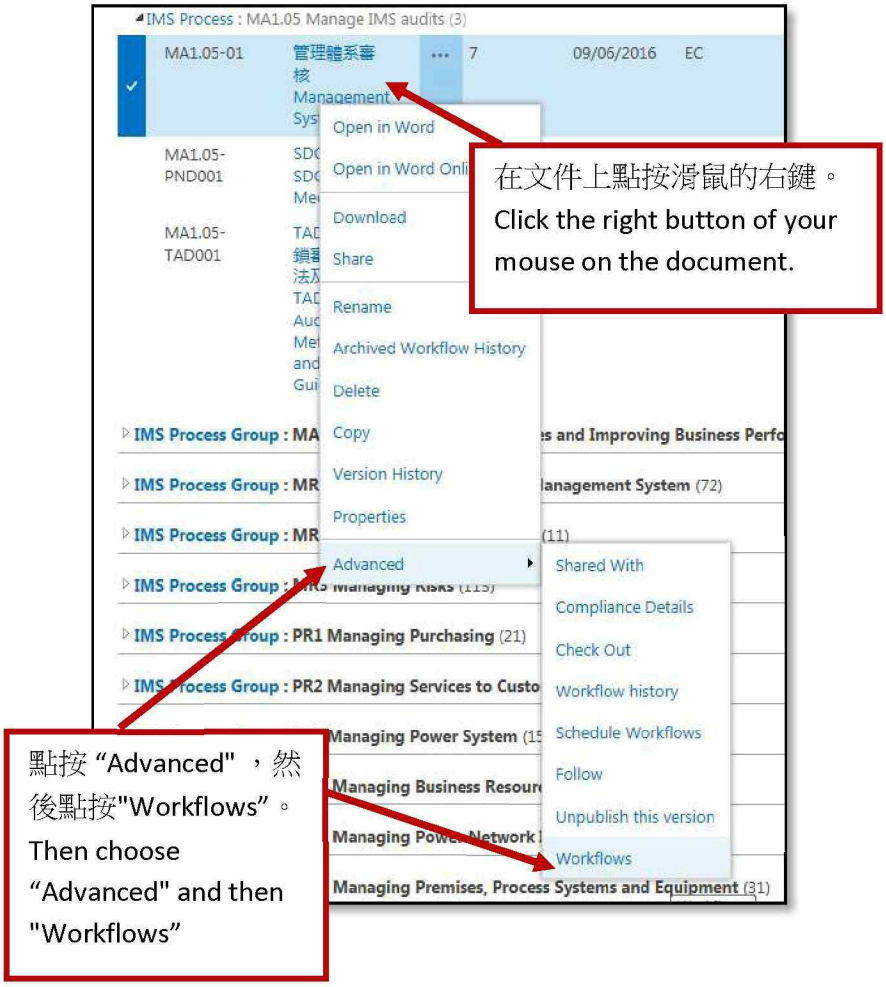
10. 修改文件後，請點按"save"。After you edit the document, save.

11. 此時文件為"Draft"，不是"Approved" 。Note that the document is now classified as "Draft" and not "Approved".

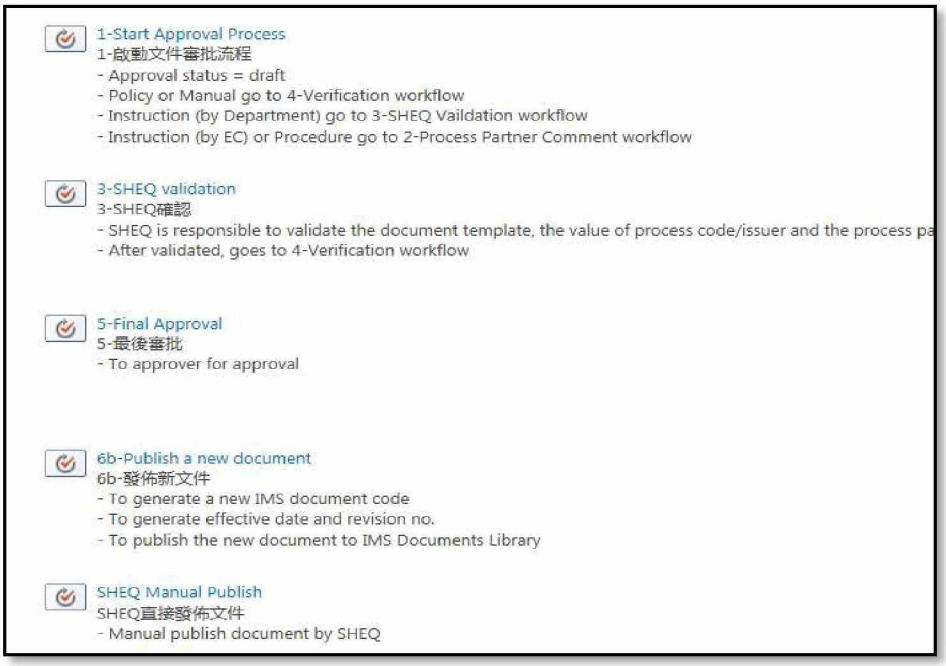


12. 如有需要進一步修改，再次進入文件，重覆執行步驟 6-10。If you want to do further changes, just access the document again, and perform steps 6-10 again.

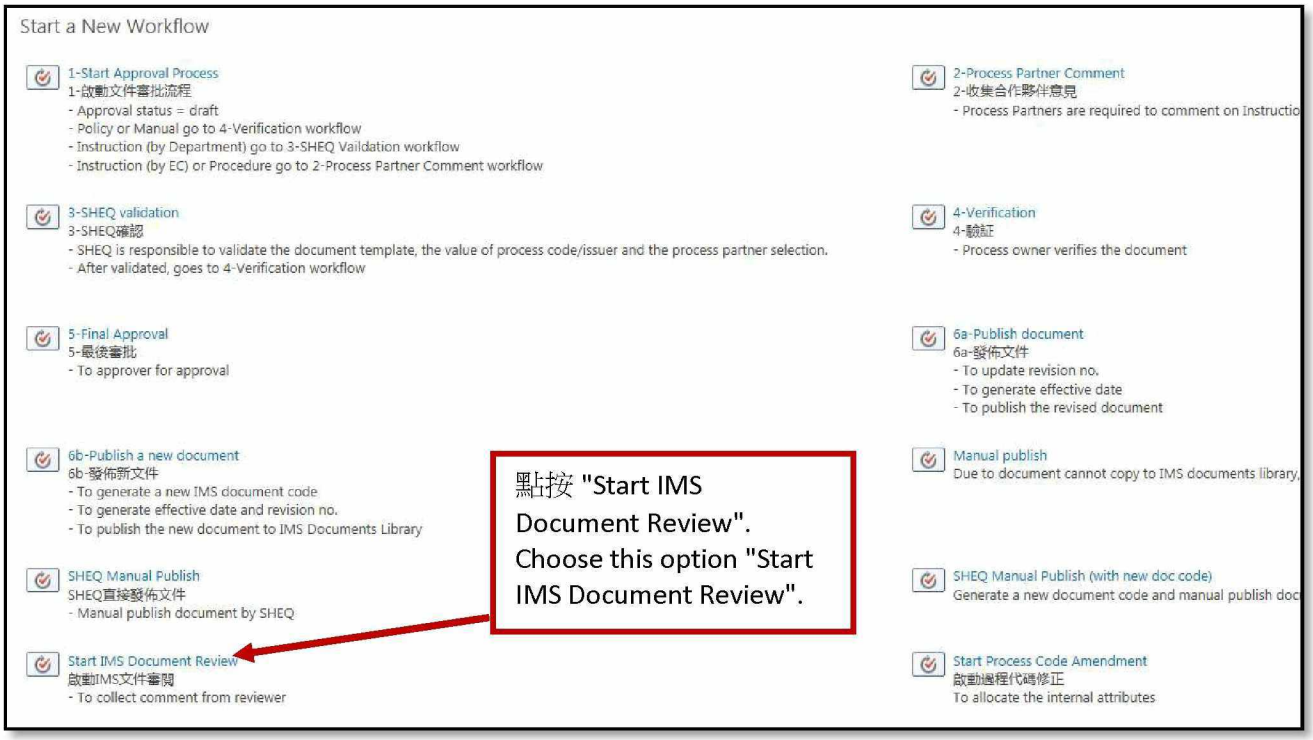
13. 當文件修改完成，需要開始批准流程。When the document revision is finished, you must start the approval process.



14. 此視窗會出現：You will go to this window:



15. 需要其他同事的意見？如需要，到下一步驟。如沒需要，到步驟 19。Do you want comments from colleagues first? If yes, please see the next step. If not, go to step 19.



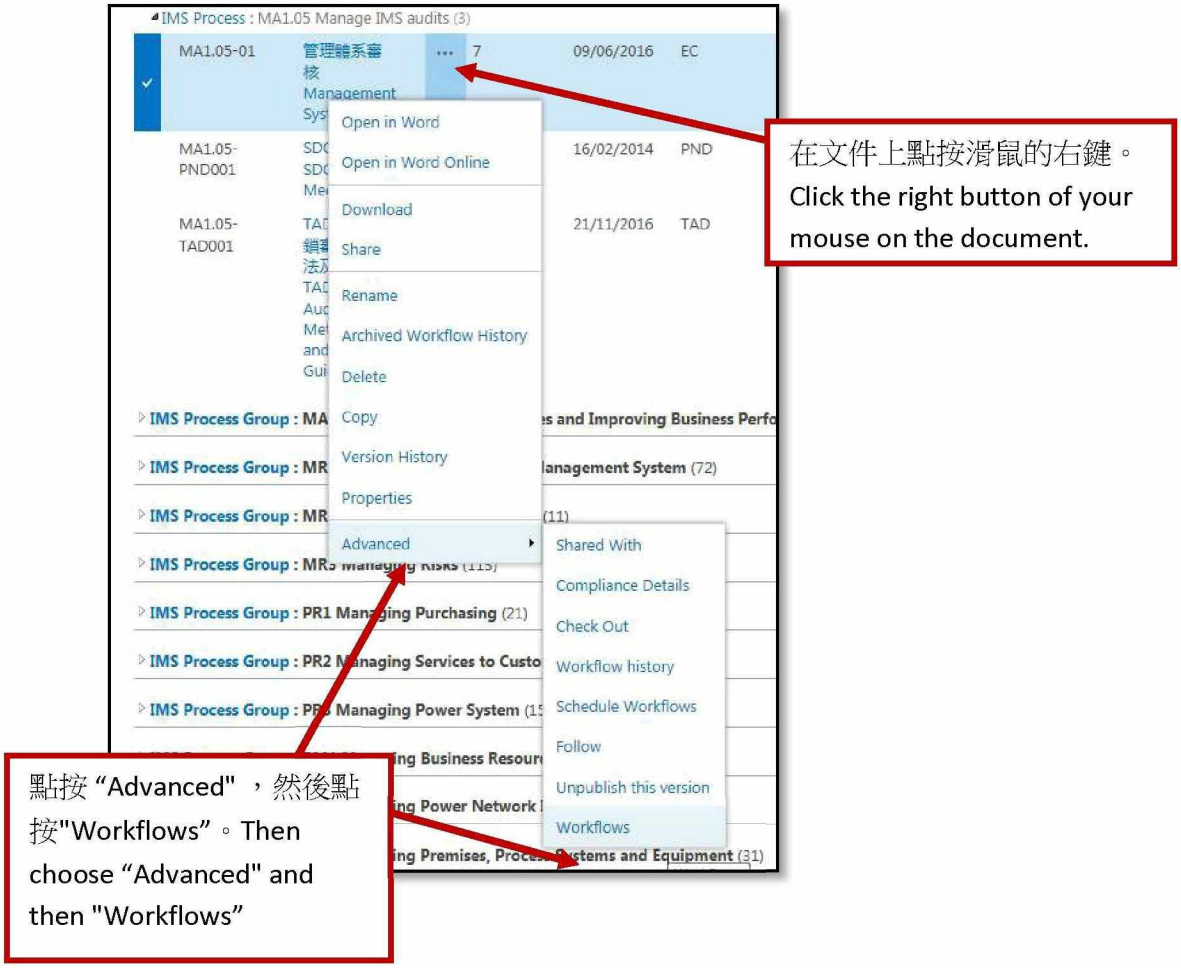
16. 然後：Then:



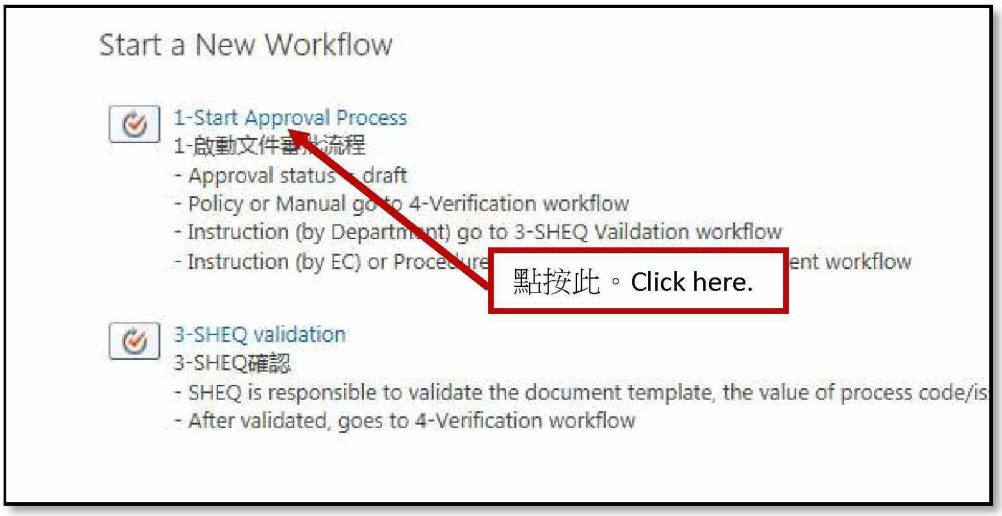
17. 現在關閉文件。數分鐘後在 Outlook 收到電郵通知。Now close your document. After a few minutes, you will receive an email notification in your Outlook.

當有人給予意見，也會收到電郵通知。After everyone gives their comments, you will receive an email notification.

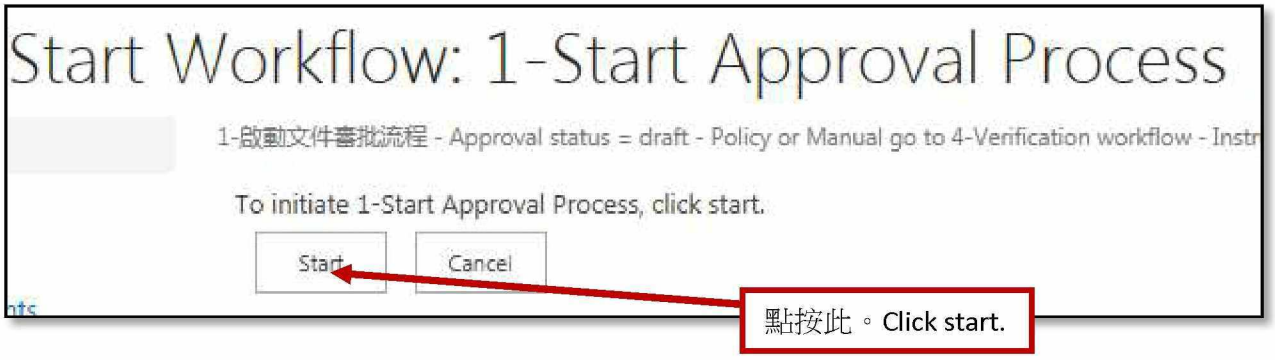
18. 當文件修改完成，需要開始批准流程。When the document revision is finished, you must start the approval process.



19. 此視窗會出現：You will go to this window:



20. 此視窗會出現：You will go to this window:



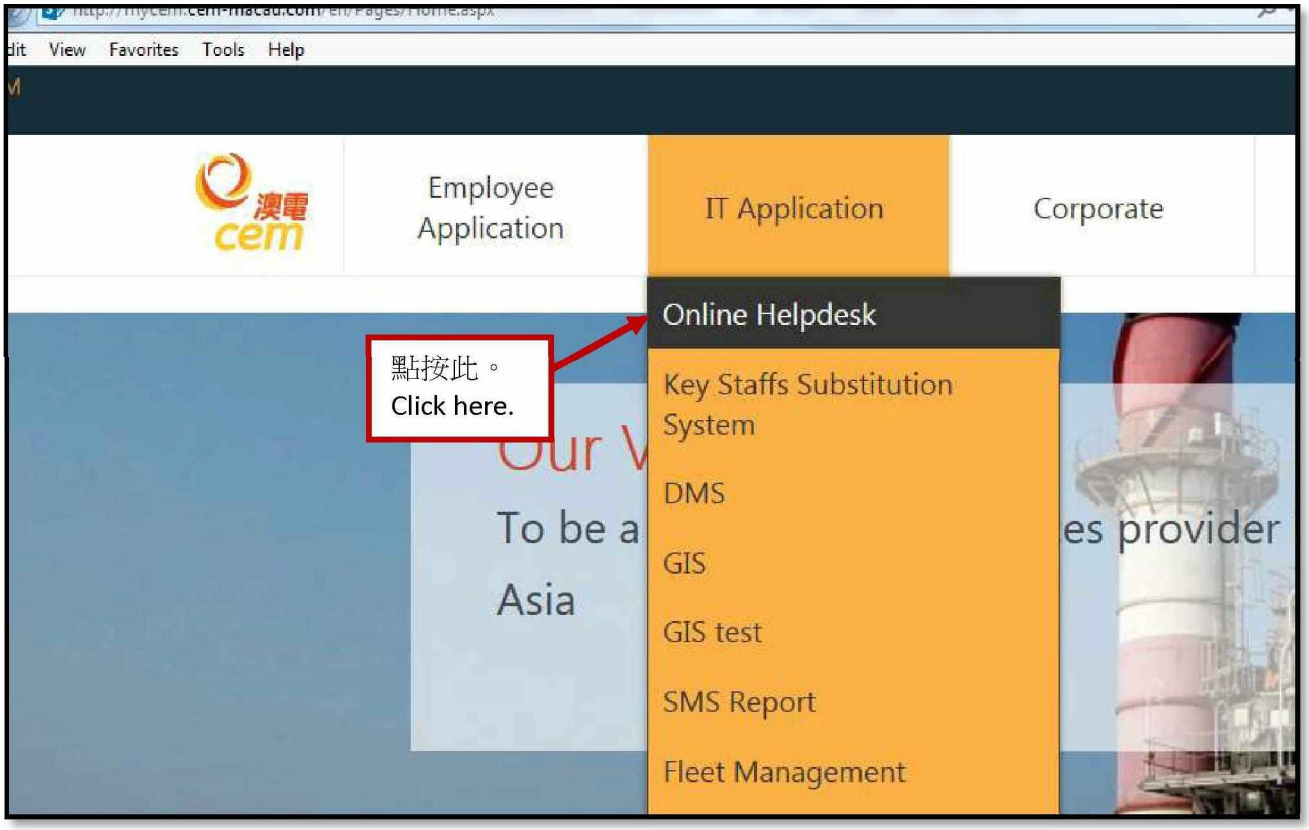
21. 工作流程會進行批准流程的第二點，程序內每個步驟都會收到電郵通知。The workflow will go to point 2 of the approval process and you will receive Outlook email notifications every step of the way.

3 - Revoke of IMS Instructions

Revoke of IMS Instruction

綜合管理系統圖書館工作流程是沒有撤回功能，需在 Online Helpdesk 開 log。The revoking of Instructions is not included in the IMS Library workflows, so we need to open an Online Helpdesk log for this.

1. 去 MyCEM 的 Online Helpdesk 開 log ：Go to MyCEM and open an online Helpdesk log:



2. 點選“Application Log”。Then choose “Application Log”



3. HelpDesk 會跟進。你的總監在 Outlook 將會收到撤回文件工作流程的通知以作批准。
Afterwards, HelpDesk will follow-up. Your Director will receive an Outlook workflow notification for revoking the IMS document, which must be approved.

4. 然後該文件會被棄用。Then the document will become obsolete.

4 - Create New IMS Record in IMS Library

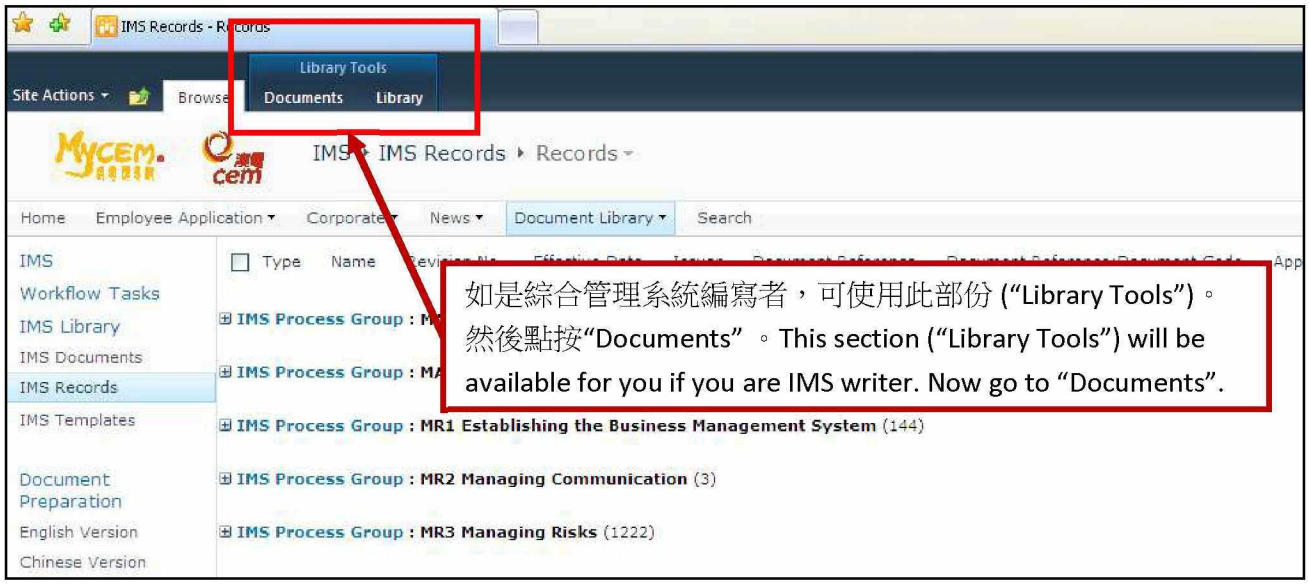
Create New IMS Record in IMS Library

你需要是受權的綜合管理系統編寫者。如不是，在 Helpdesk 開一個 log，要求成為綜合管理系統編寫者。有些部門需要得到部門總監批示。You need to be an authorized IMS writer. If you aren't, kindly create a log in Online HelpDesk (Application: IMS) to be granted this access. For some departments you may need the approval of Director to be an IMS writer.

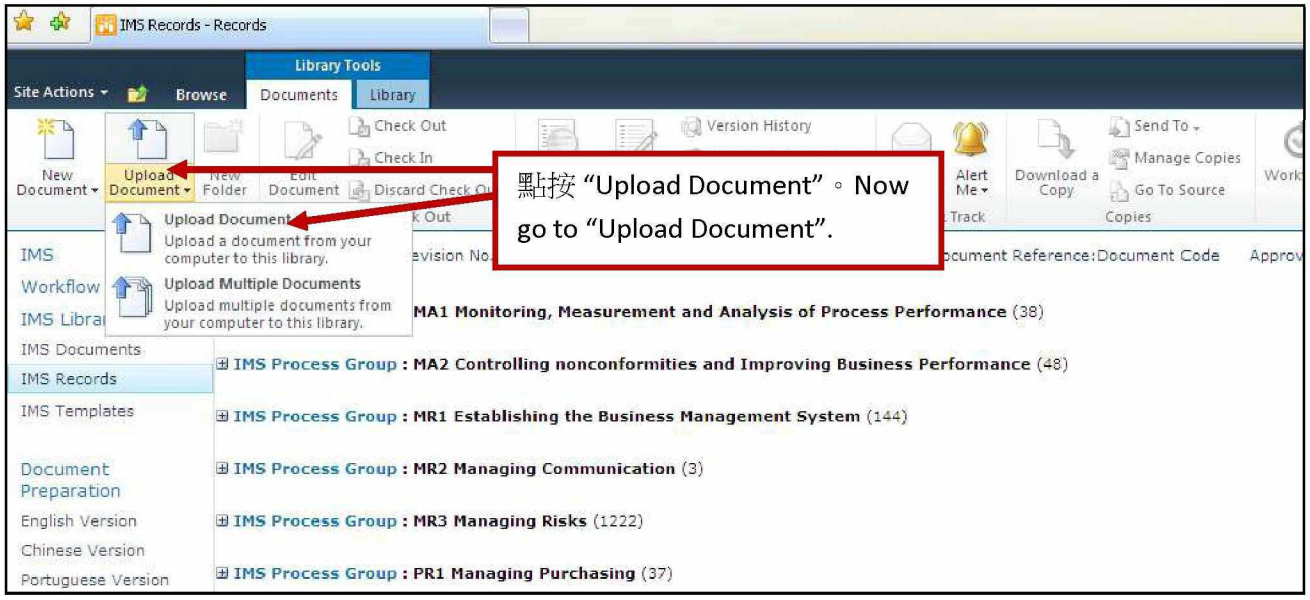
1) 進入 IMS：Then go to IMS:



2) 會進入此視窗 You will go to this window:



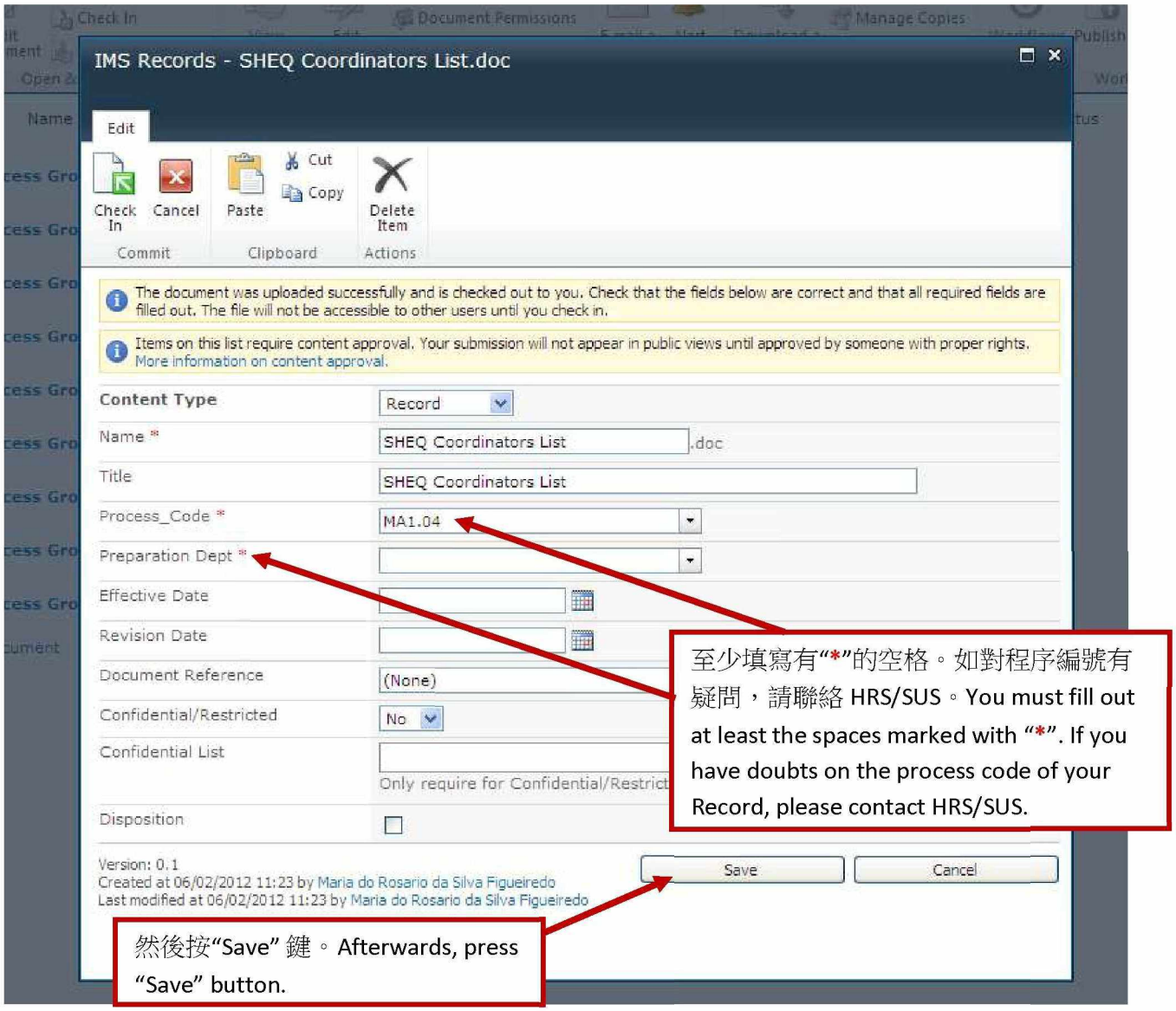
3) 然後：Then:



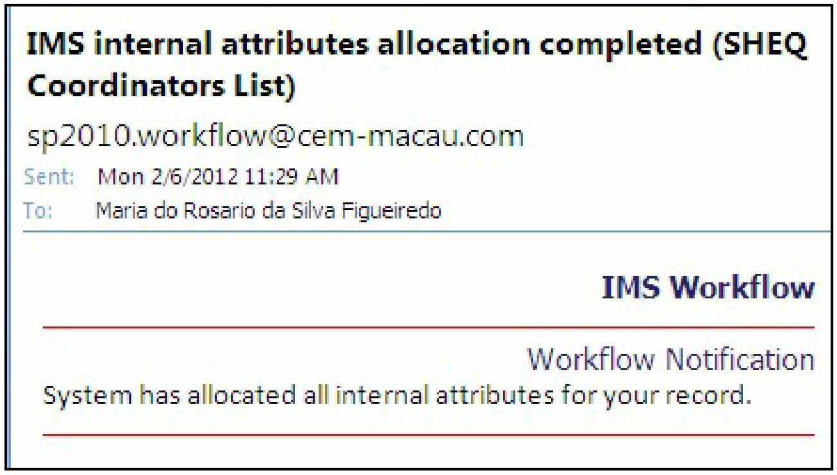
4) 一個新視窗出現：A new window will open:



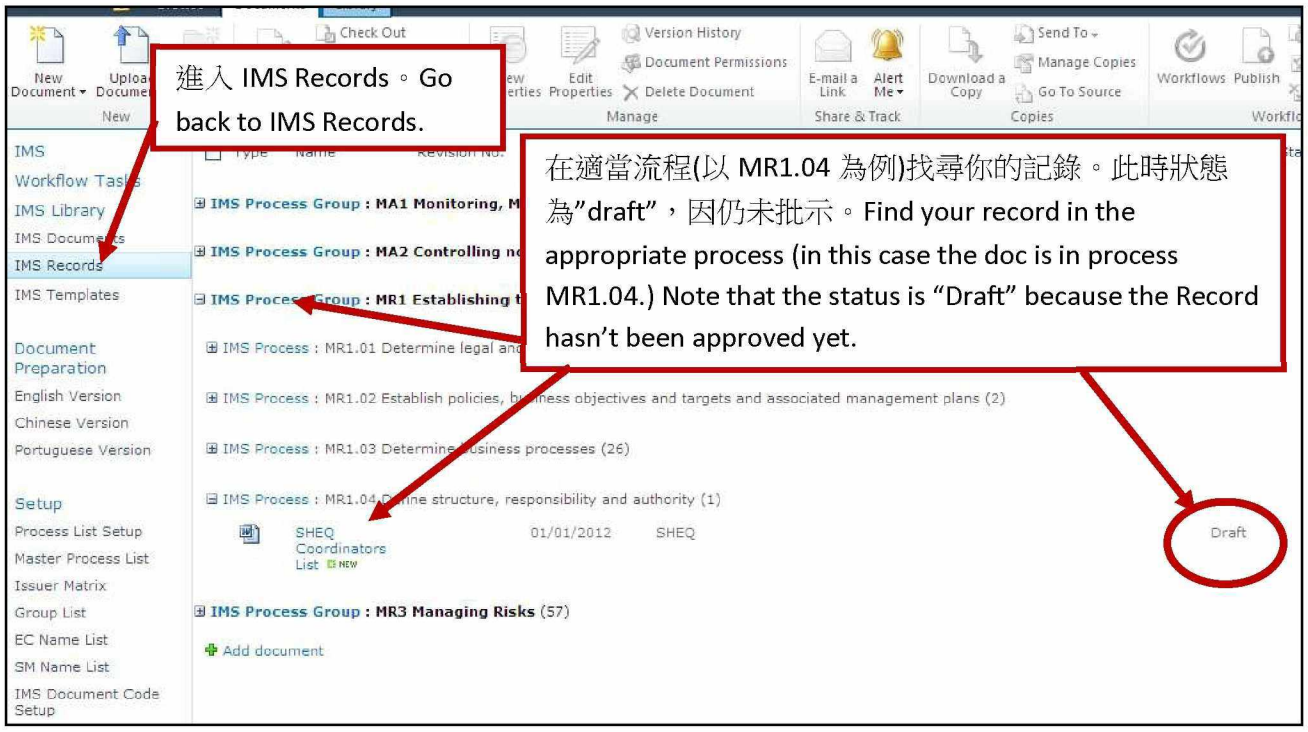
5) 然後一個新視窗出現：Then a new window will open:



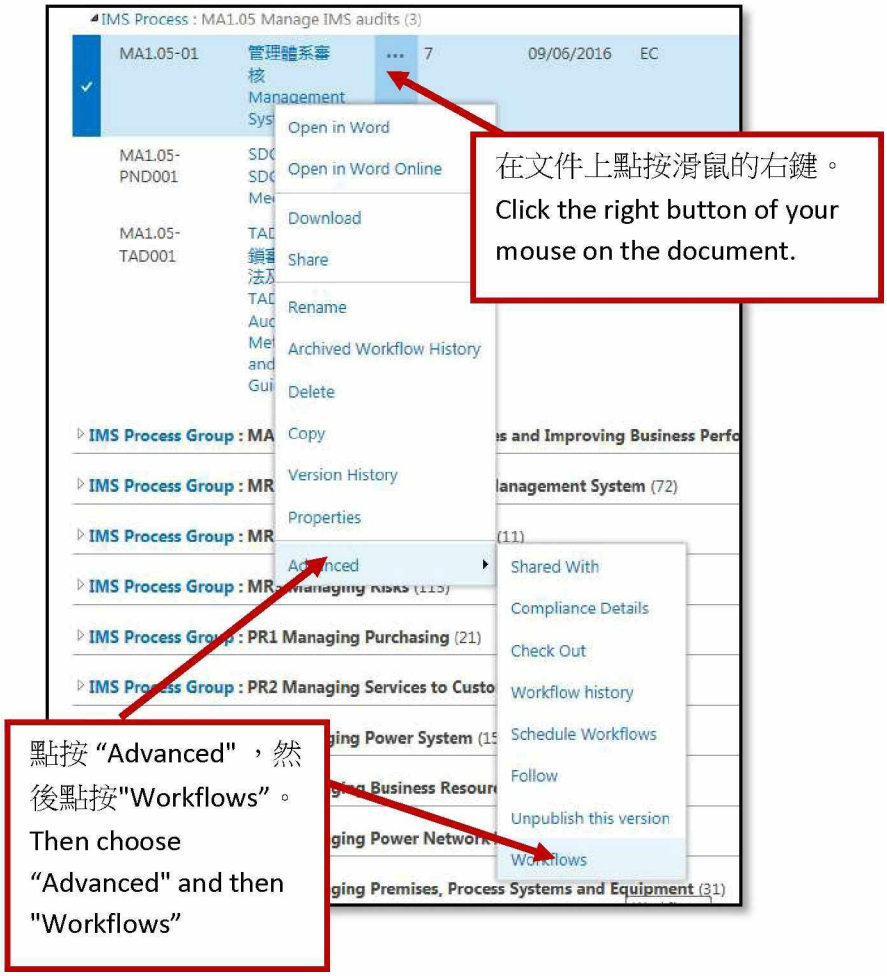
6) 當記錄上傳後，會收到電郵通知：After the Record is uploaded, you will receive an email notification in Microsoft Outlook:



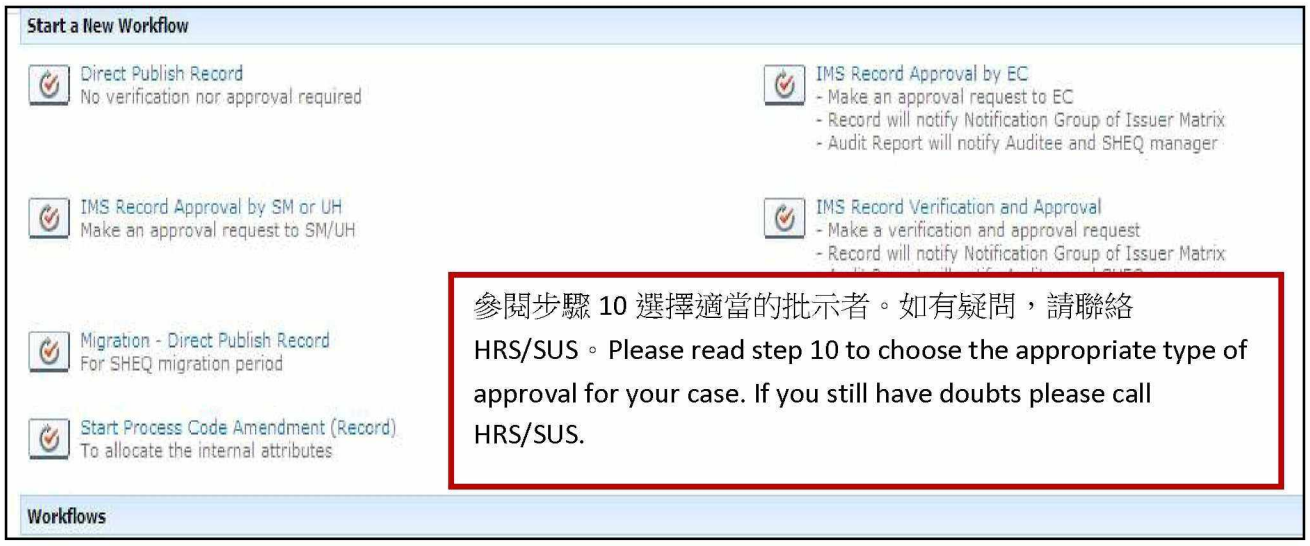
7) 現在記錄需被驗證及批示：Now the Record needs to be verified and approved:



8) 點選"workflows": Then choose "workflows":



9) 來到此視窗。不同情況有不同批示流程，需選擇適當的批示者。You will go to this window. Note that the approval process depends on each case. So choose the appropriate approver.



10) 如果記錄包括: If the record involves:

a. 一個單位，點選 one Unit, choose “Approval by UH”;
b. 部分內兩個或以上單位，點選 Two or more units of one department, choose “Approval by SM”
c. 兩個或以上部門，點選 Two or more different departments, choose “Approval by EC”
d. 特別記錄(例如 JHA)需驗證受批示，此情況點選 Special records (higher level, like JHA) need verification and approval. In this case choose “IMS Record Verification and Approval”

11) 新視窗出現: A new window will appear:



12) 你會在 Outlook 收到通知 Workflow 已啟動，批示者執行 Workflow 下一步。You will receive a Outlook notification that says that the workflow was activated and the next step of the workflow is with the approver.

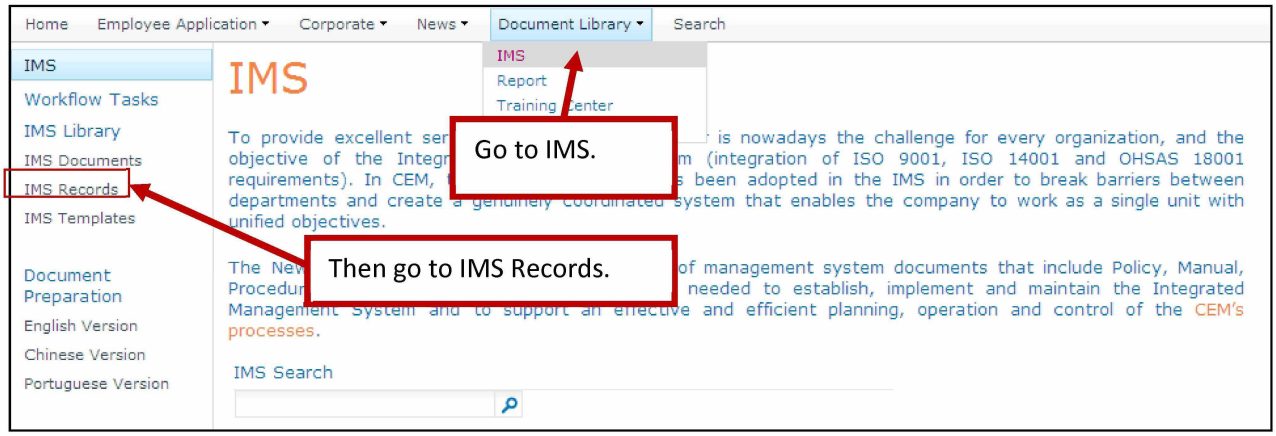
5 - Revision of IMS Records

IMS Library

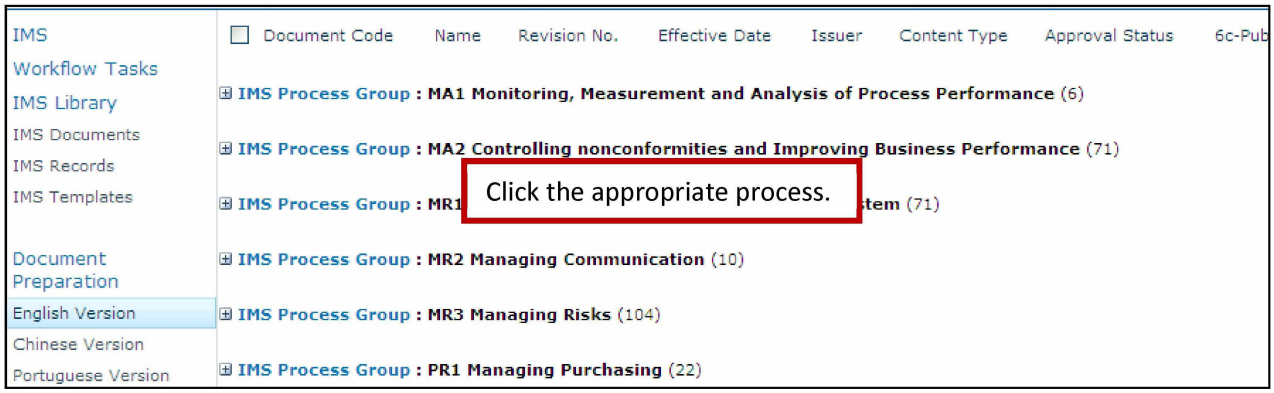
Frequent Asked Questions

Q: How do I revise an IMS Revision?
A: Follow the next steps.

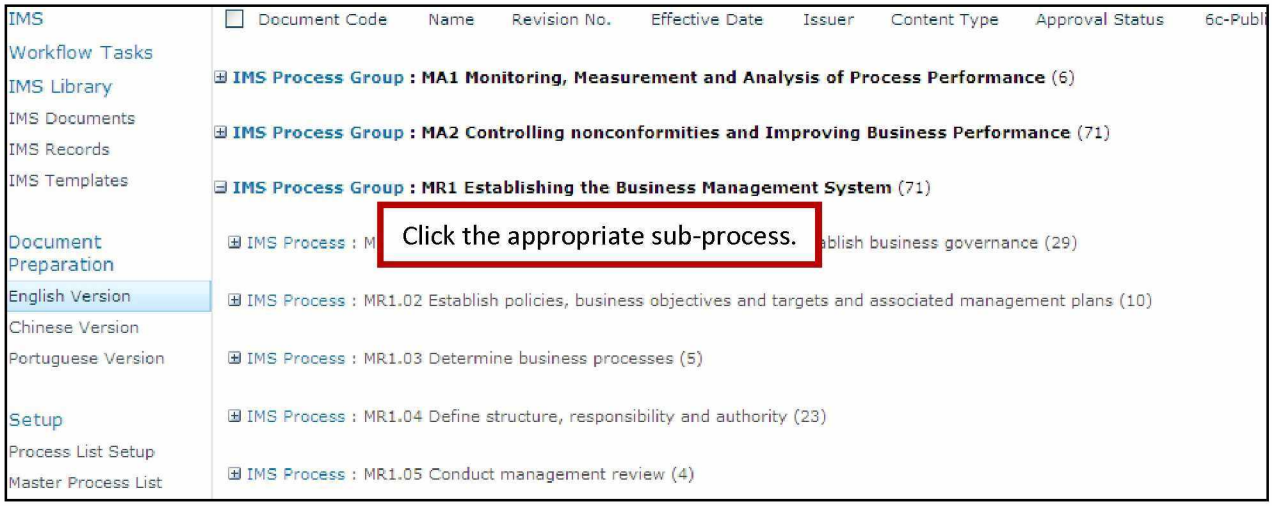
1) Go to IMS records in MyCEM:



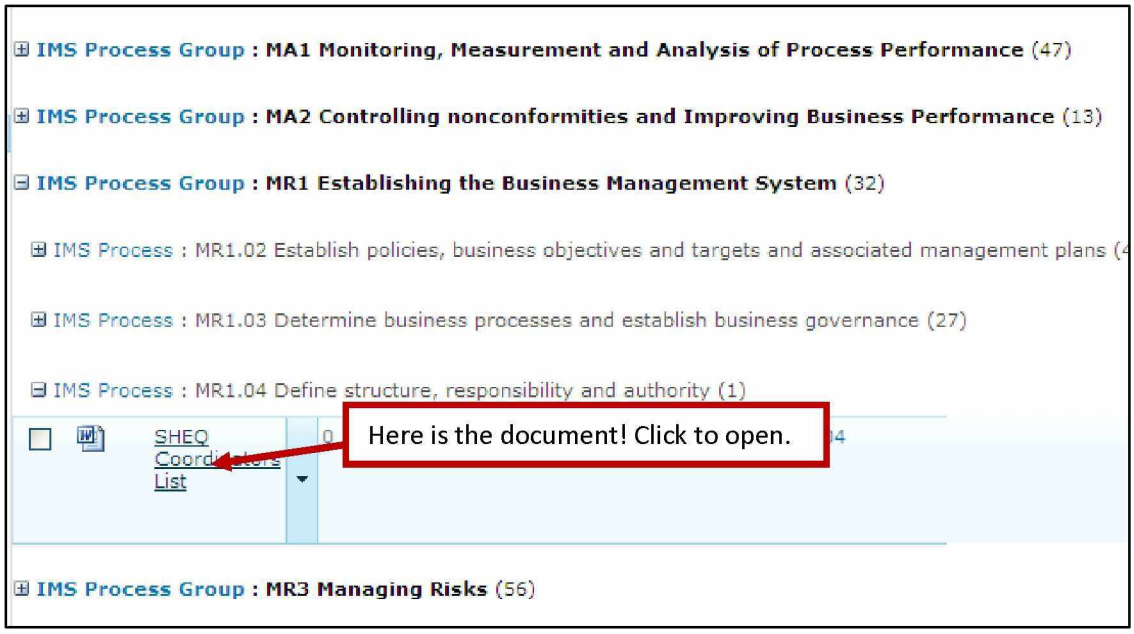
2) Choose the process where the IMS Record to revise is inserted:



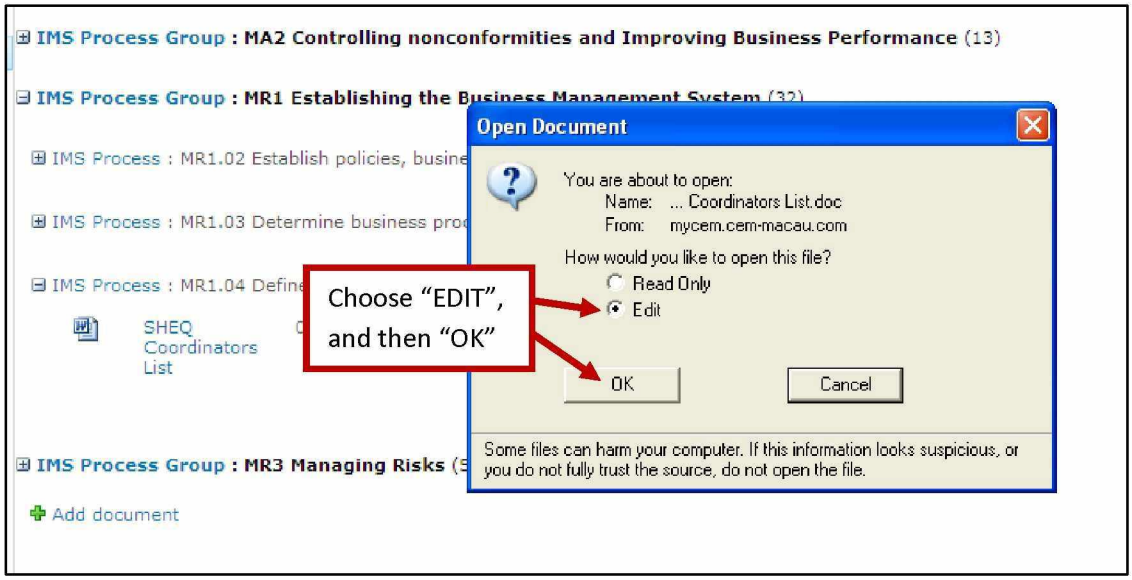
3) Then click the sub-process you need.



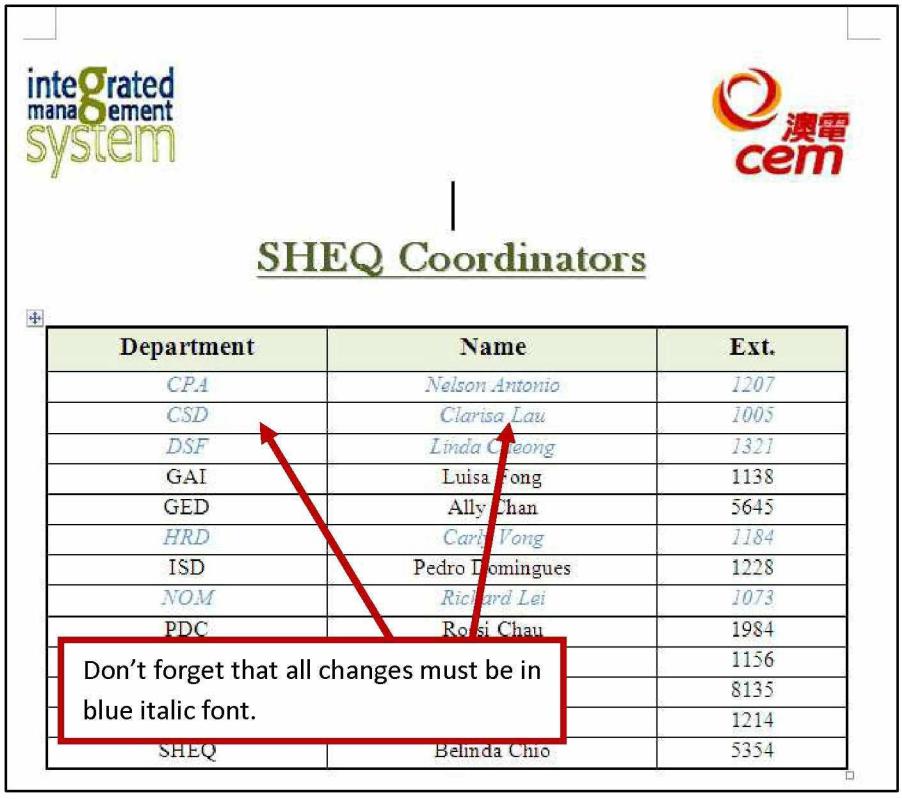
4) Did you find your document? Then click it.



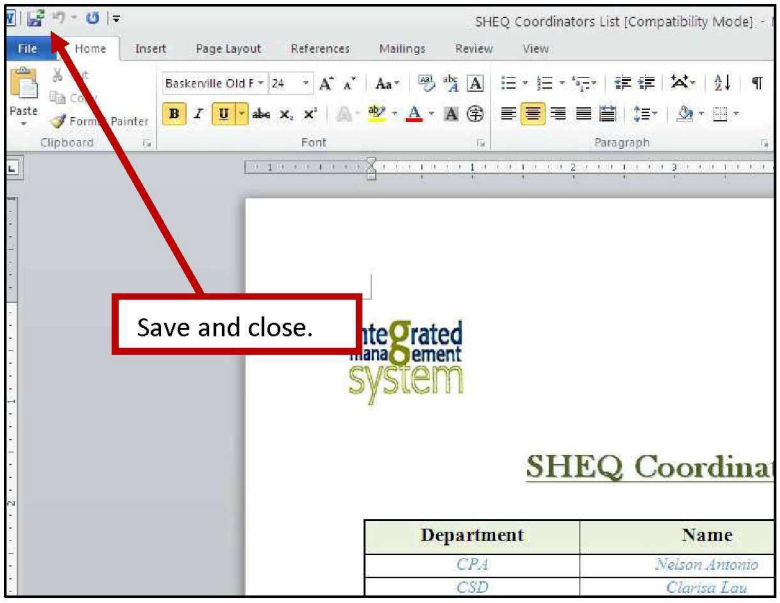
5) A new window will open.



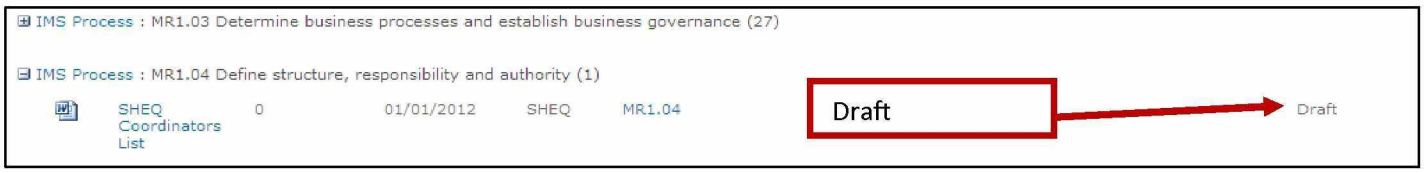
6) Now you can make your changes in your record.



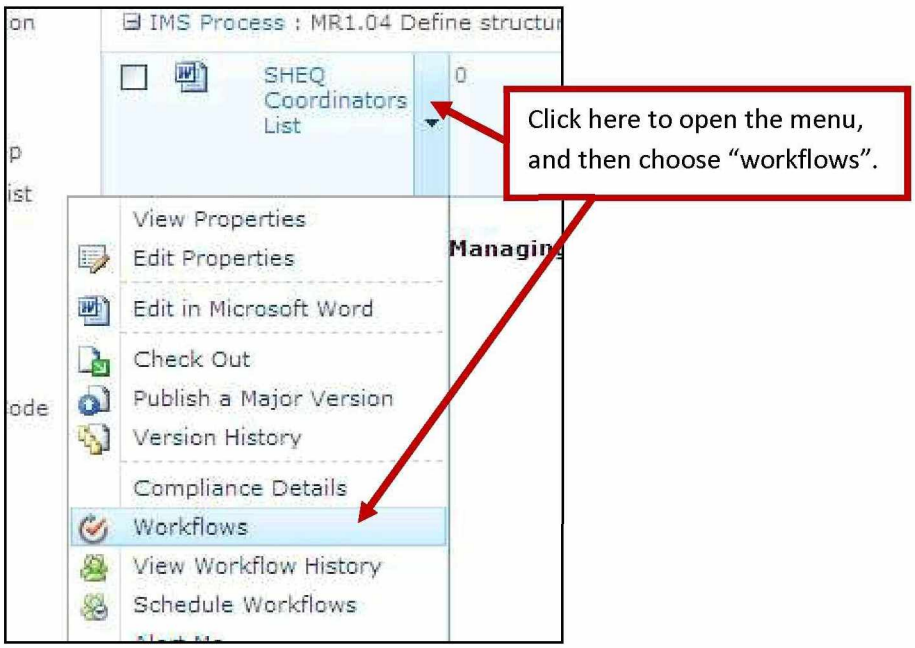
7) Now Save.



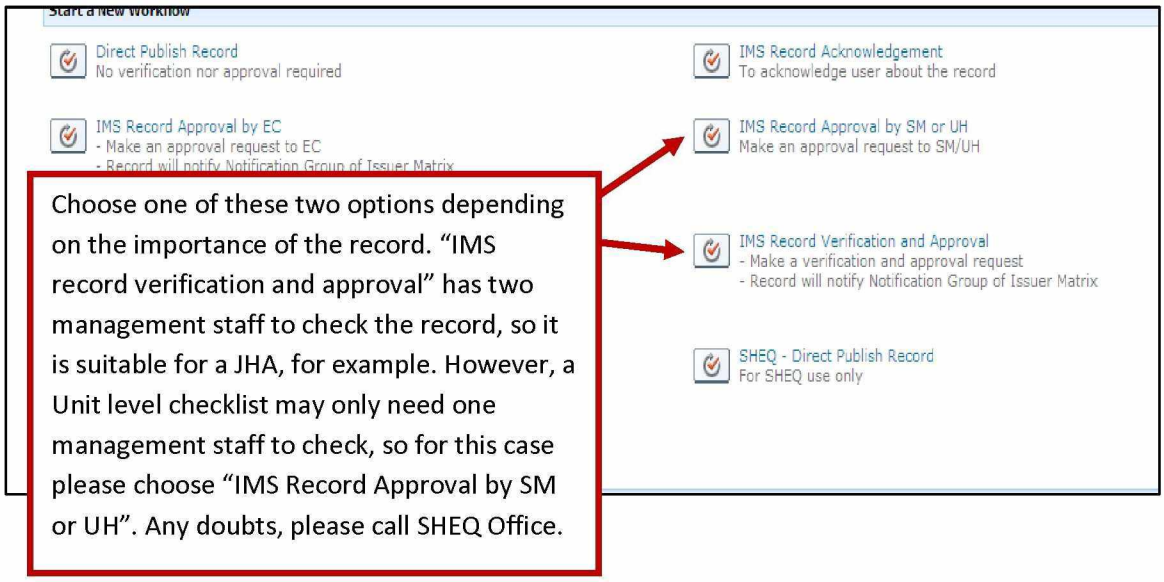
8) Go back to IMS records in IMS Library. Your record now is in a "Draft".



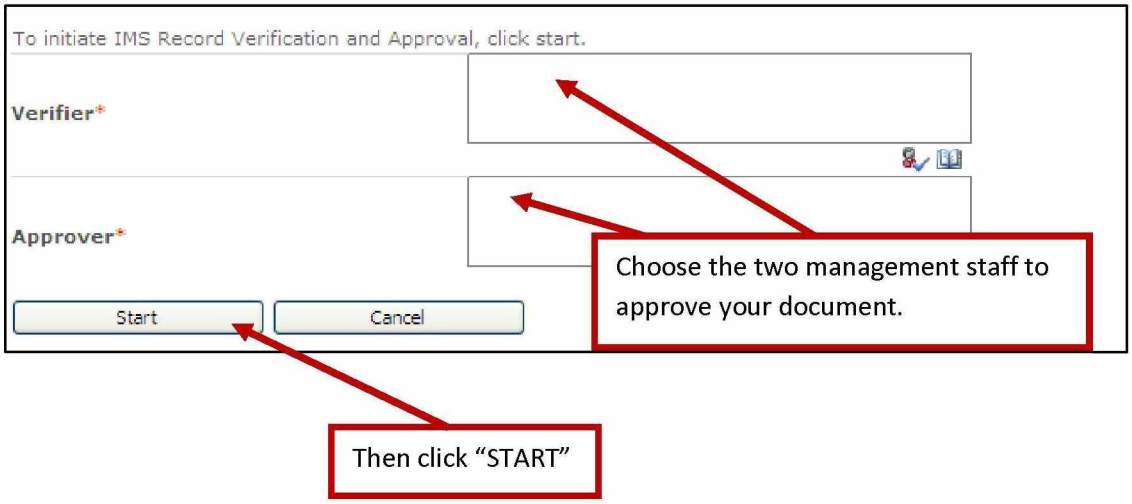
9) So now it is necessary to start the approval process of the record:



10) A new window will open.



11) A new window will appear:



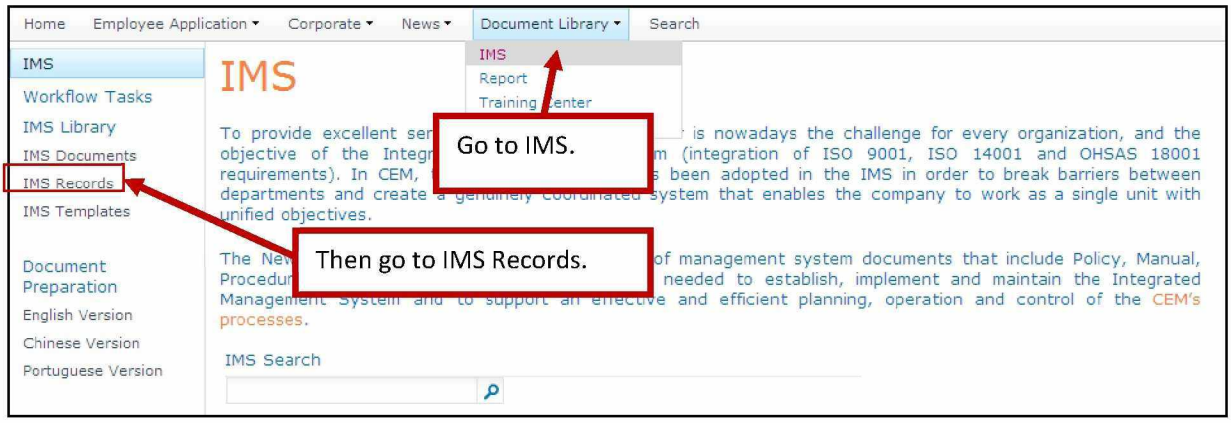
12) Now the workflow will go to the management staff you chose. You will receive an email notification for all the steps of the approval process.

6 - Revision of JHA in IMS Records

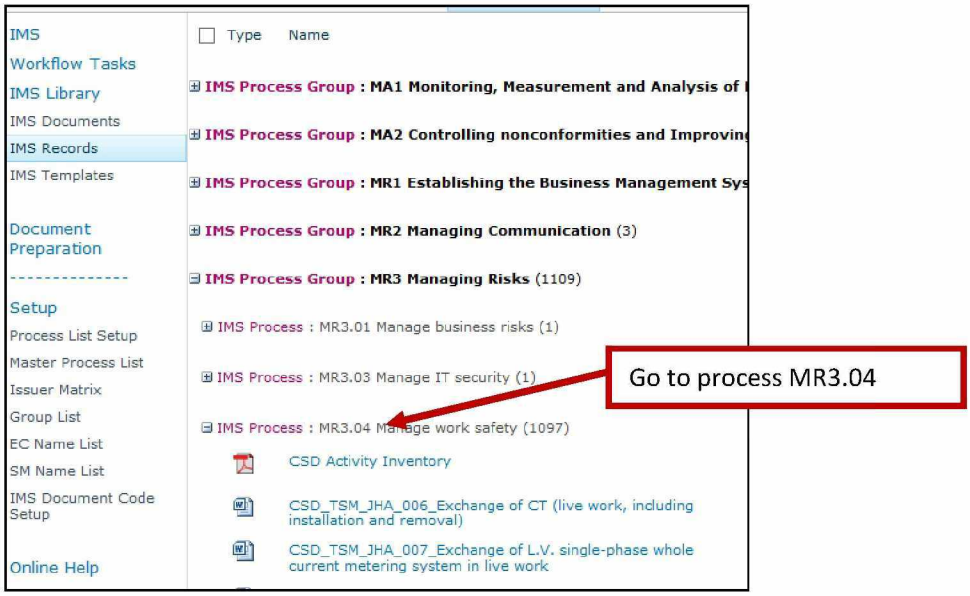
Revision of JHA in IMS Records

All JHAs shall be revised in IMS library directly by the department reviewing the JHA.

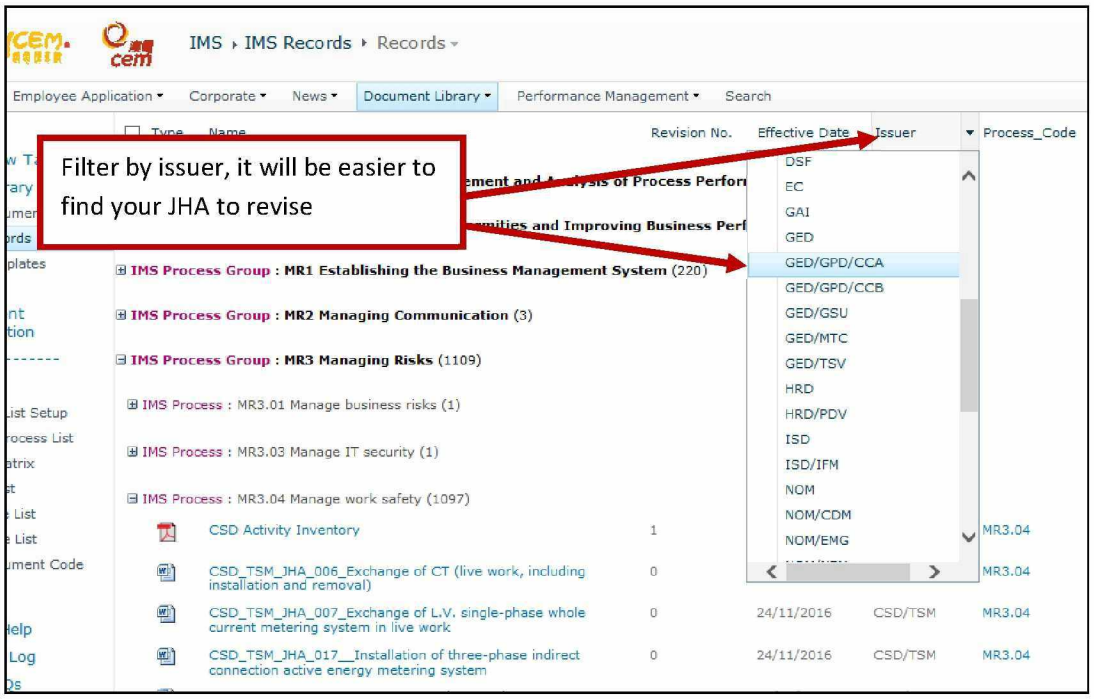
1) Go to IMS records in MyCEM:



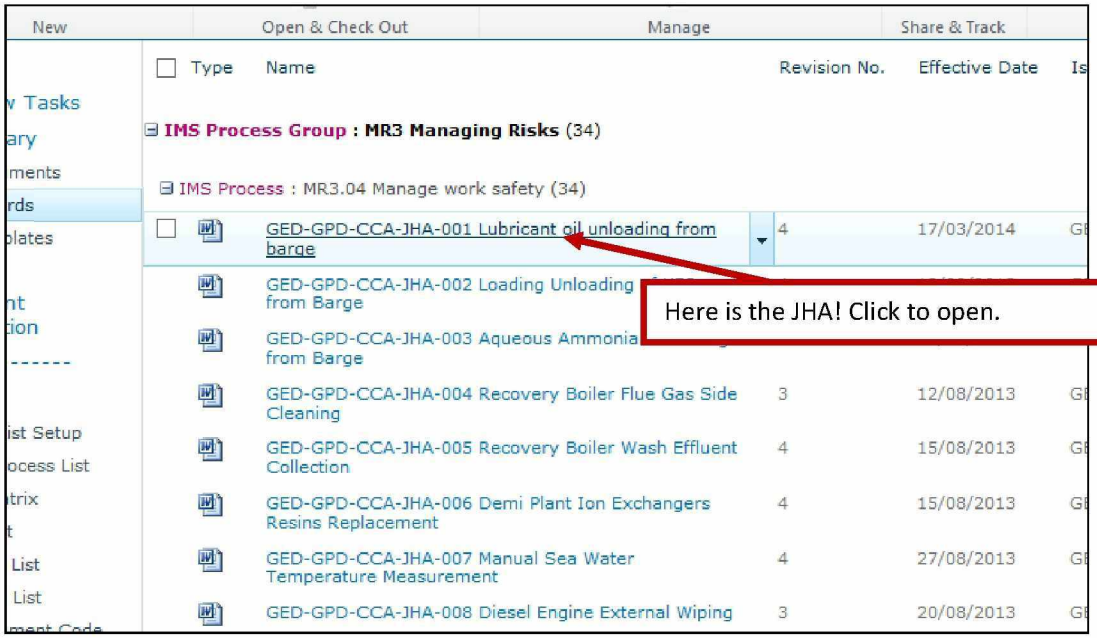
2) Choose the process MR3.04 where the JHA are inserted:



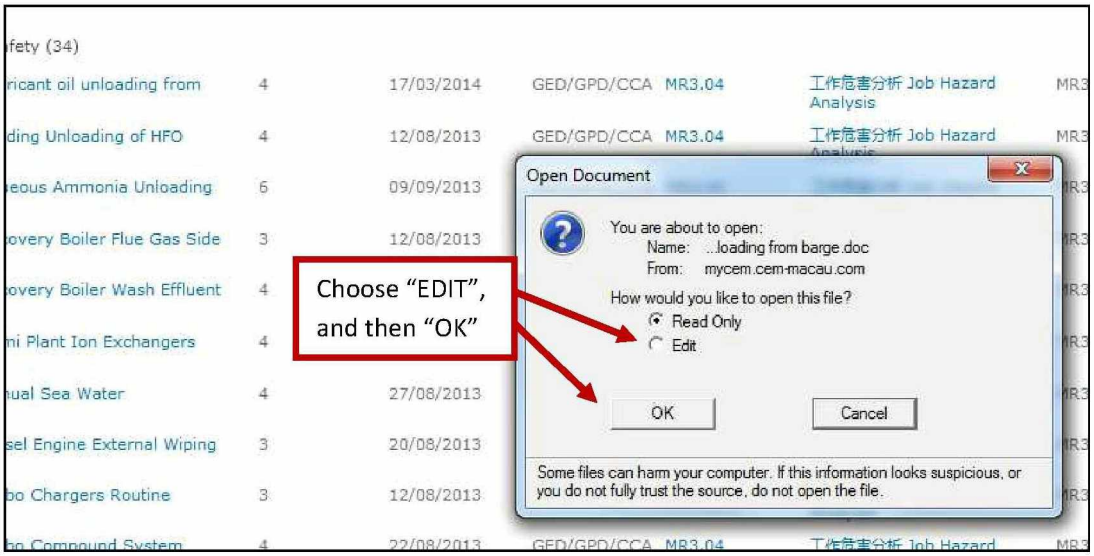
3) There are a large number of JHA, so better to look for the JHA you want to revise by doing a filter:



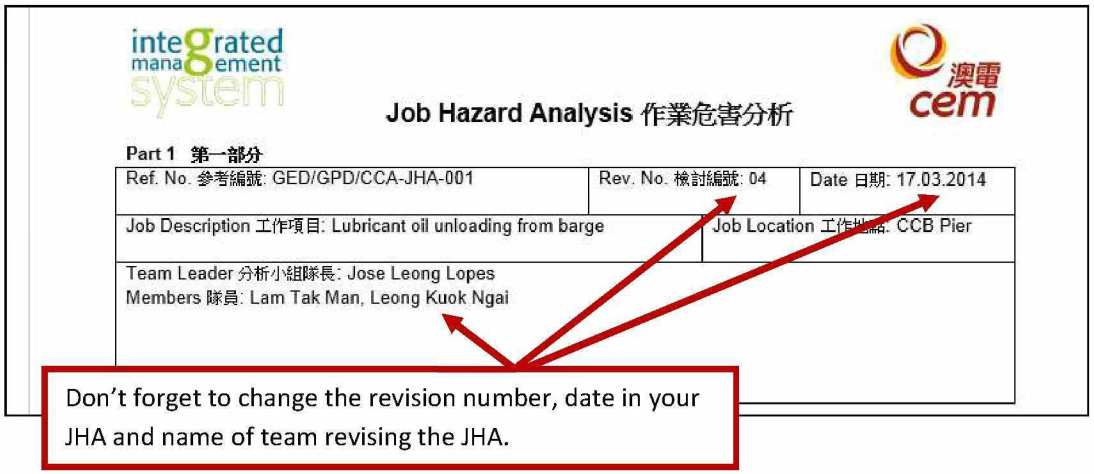
4) Did you find your JHA to revise? Then click it.

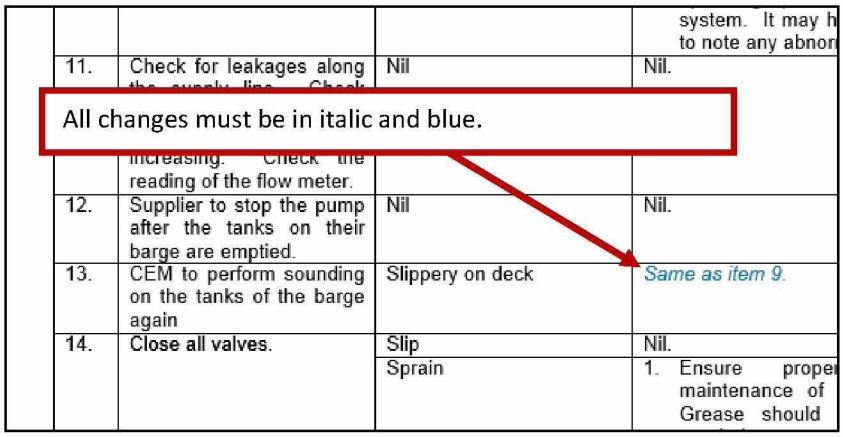


5) A new window will open.

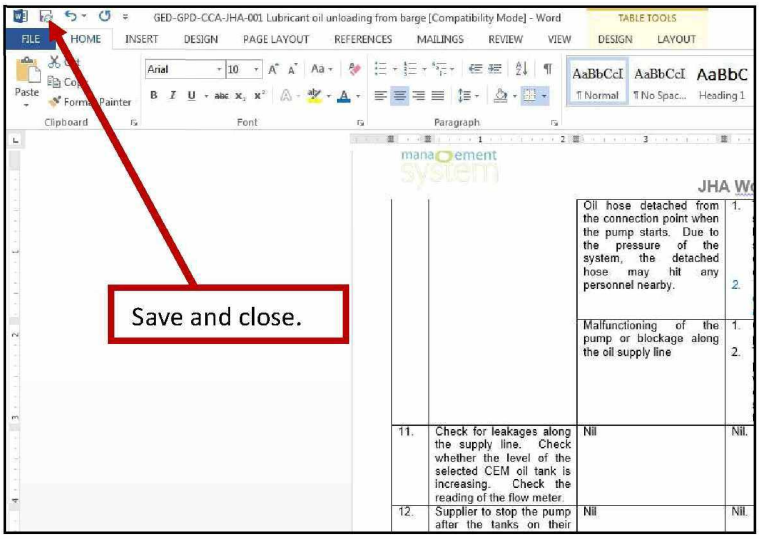


6) Now you can make your changes in your JHA.

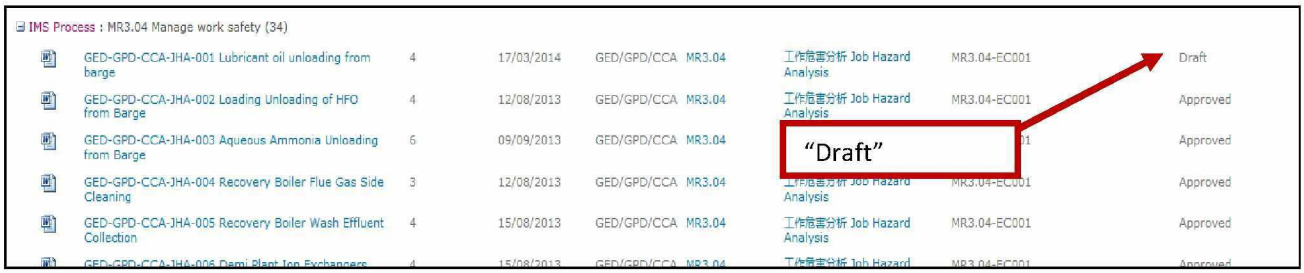




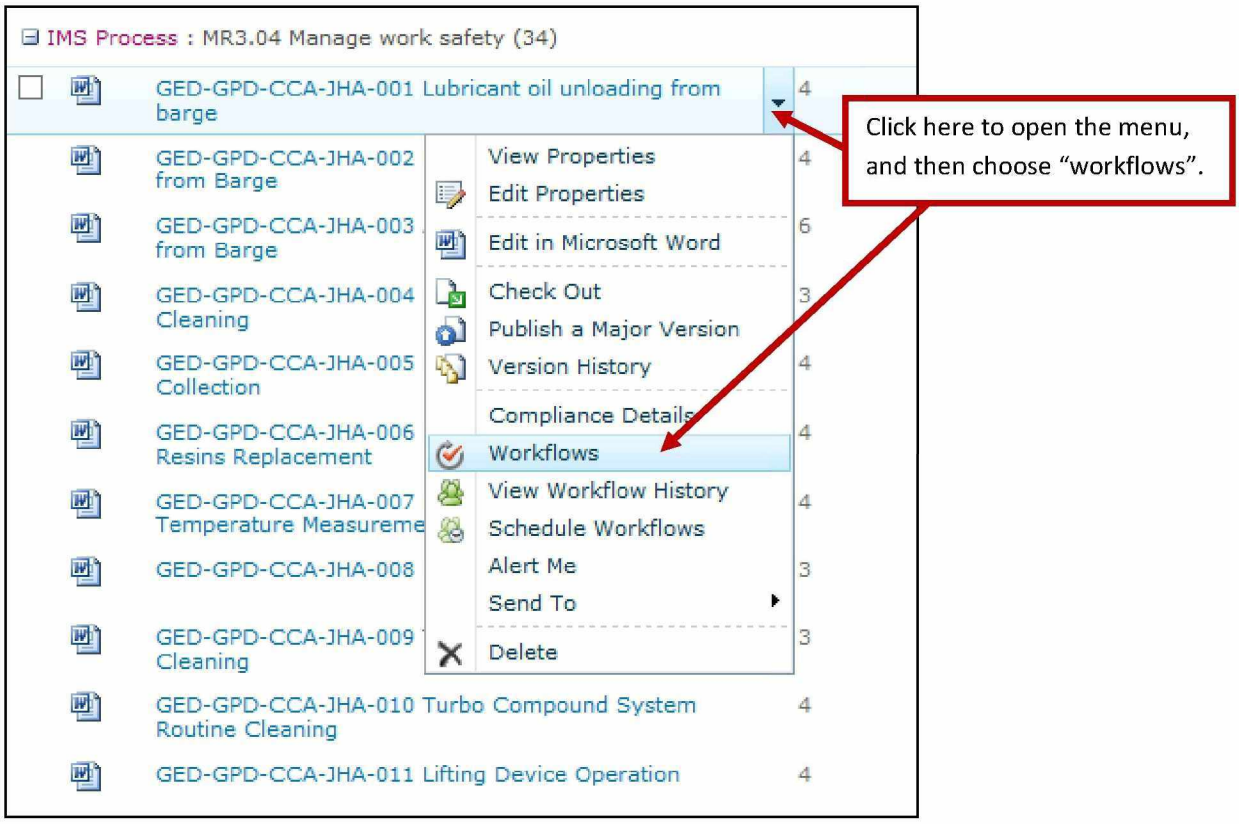
7) After finishing your revision, save.



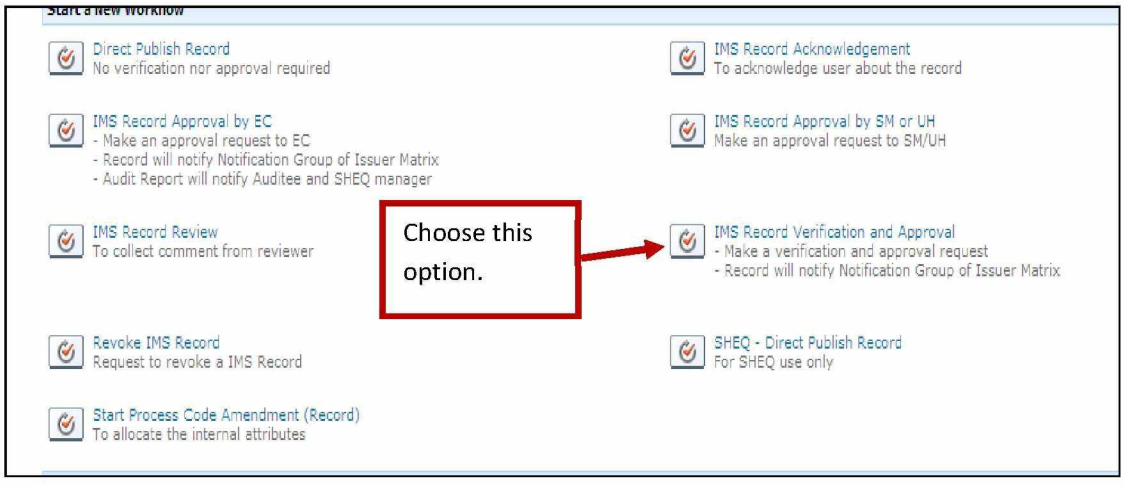
8) Go back to IMS records in IMS Library. Your record now is in a "Draft".



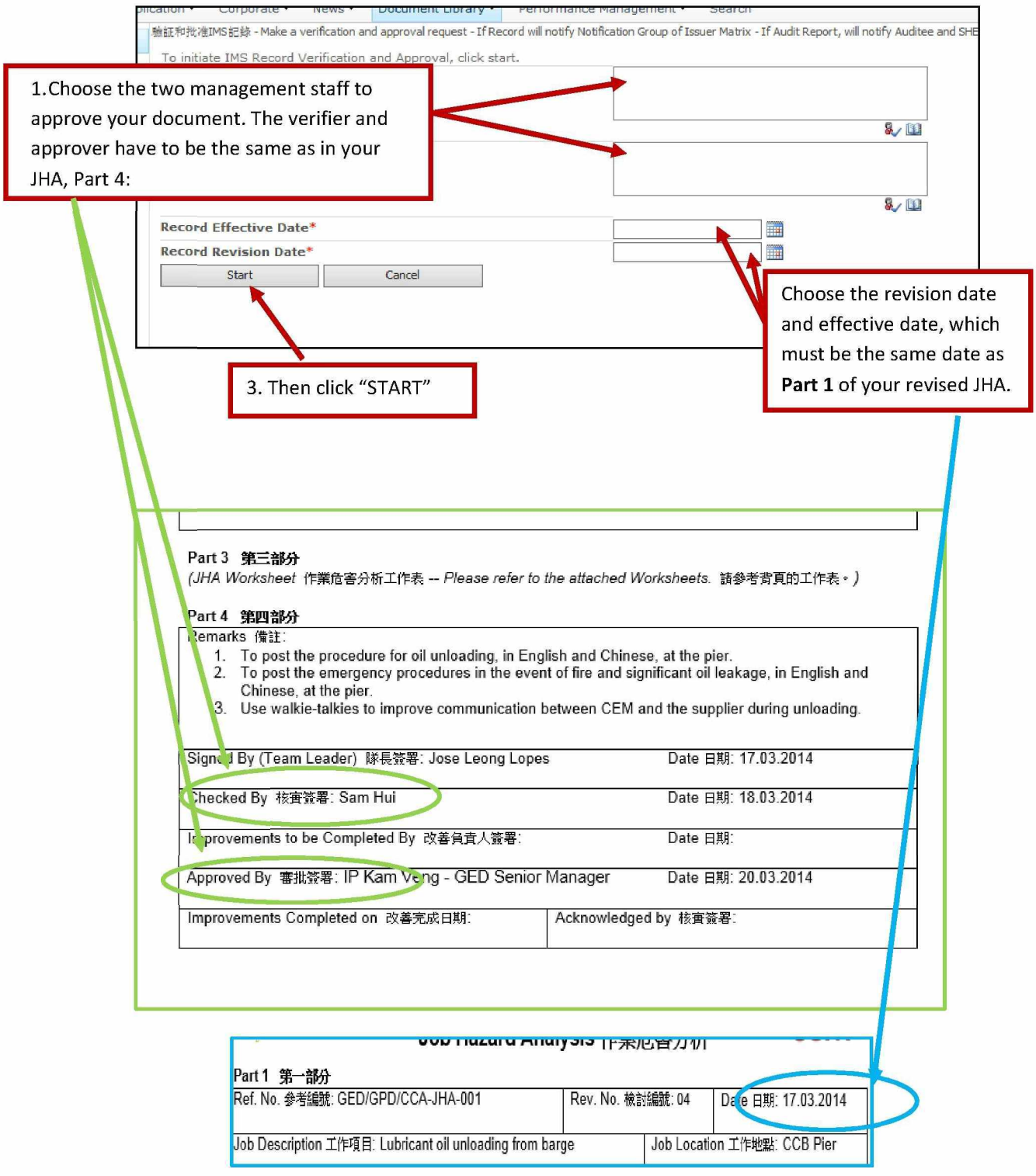
9) So now it is necessary to start the approval process of the record:



10) A new window will open.



11) A new window will appear:



12) Now the workflow will go to the management staff you chose. You will receive an email notification for all the steps of the approval process.

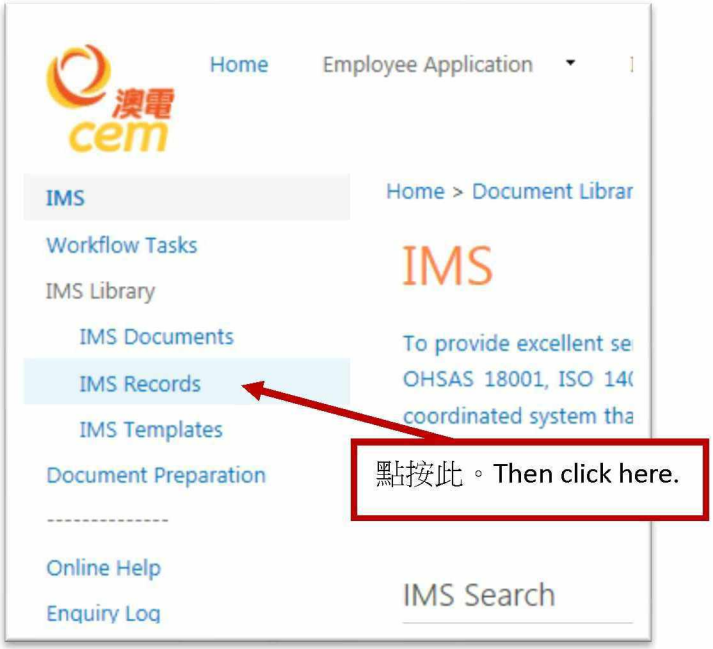
7 - Revoke of IMS Records

撤回綜合管理系統記錄 Revoke of IMS Records

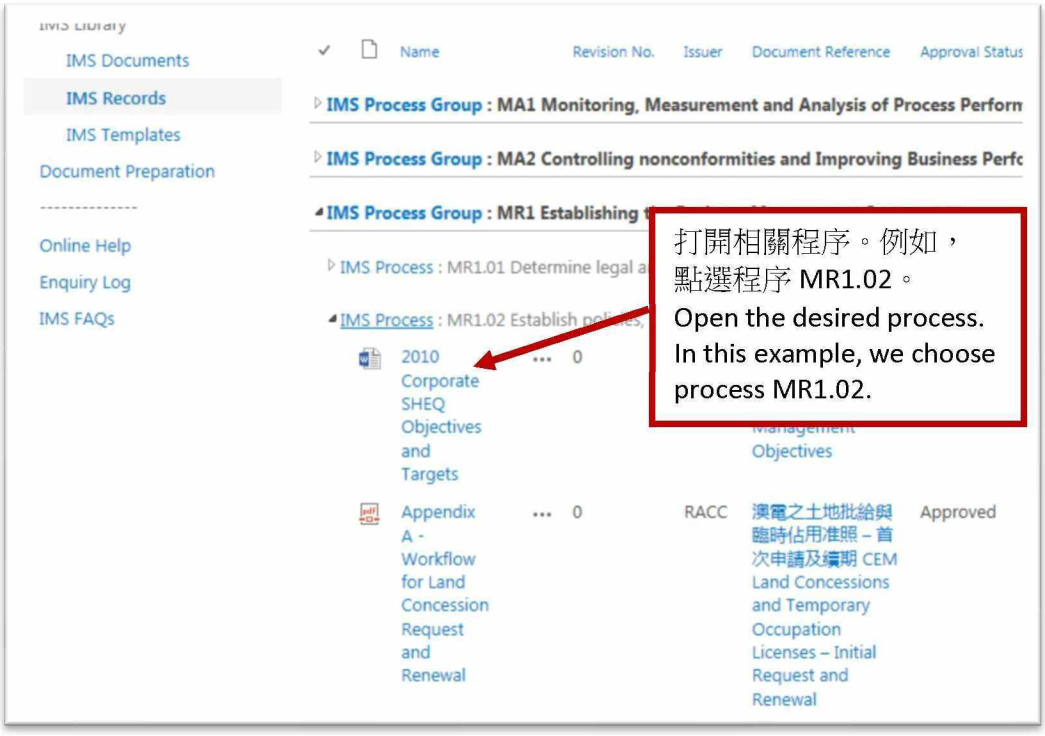
1. 去 MyCEM： Go to MyCEM:



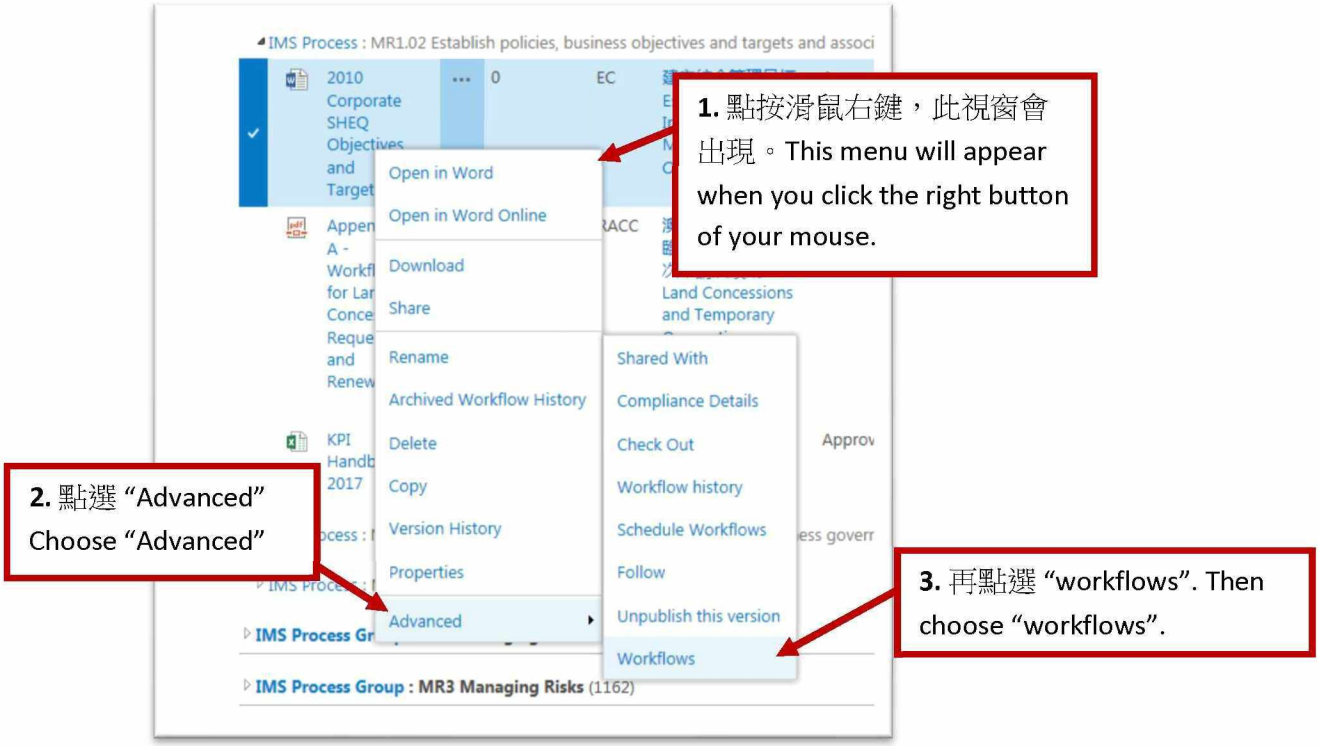
2. 去 IMS Records (在左邊)：Go to IMS Records (left side):



3. 在相關程序找出需要撤回的記錄：Then open the process that has the IMS Record you want to revoke:



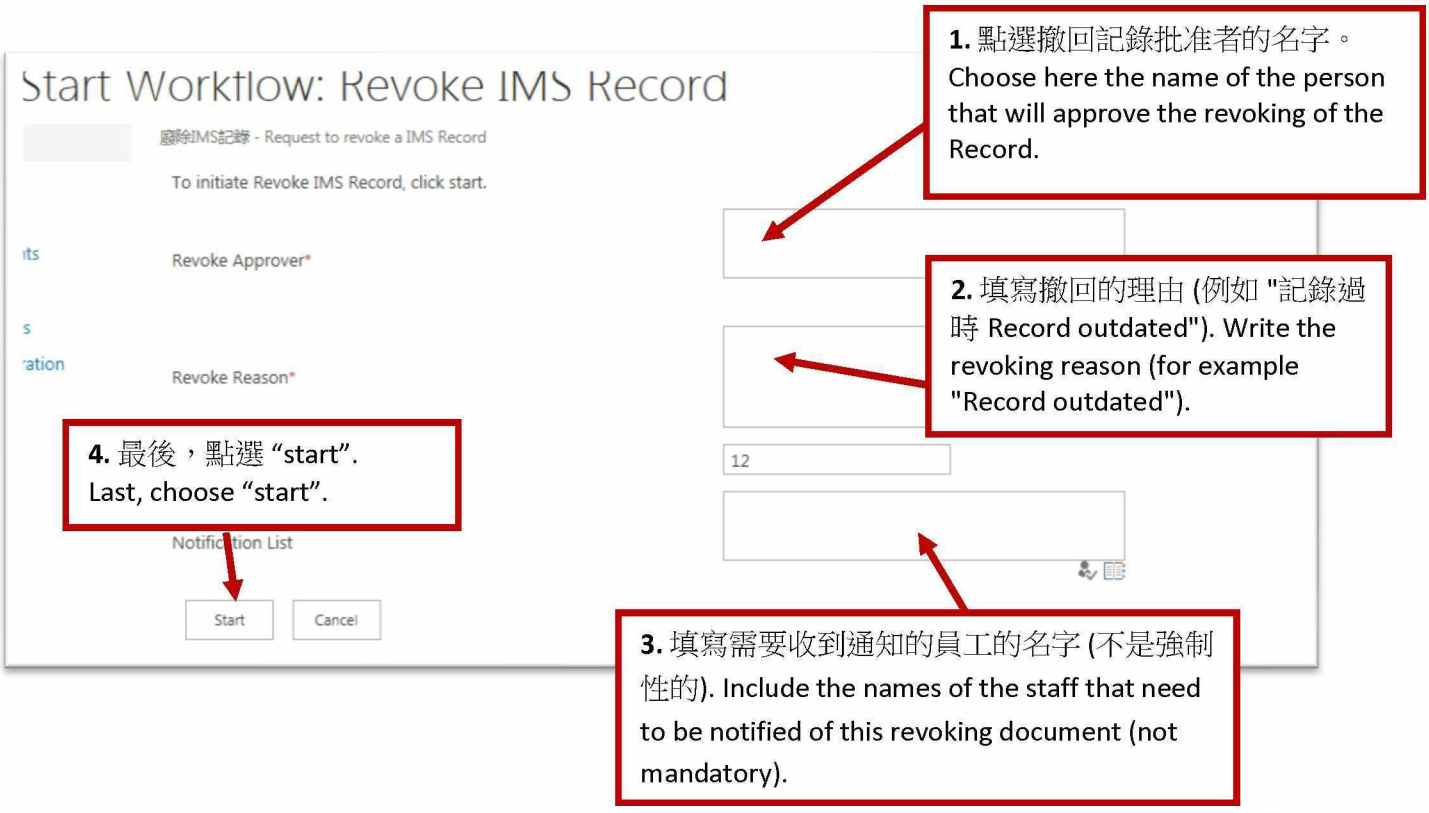
4. 點選需要撤回的記錄：Choose the IMS Record you want to revoke:



5. 此視窗會出現：This window will appear:



6. 然後：Then:



7. 工作流程會去到撤回批准者，此時, 你將會收到電郵通知。The workflow will go to the revoke approver, and you will receive an Outlook email notification of this.



8. 批准後，記錄會被棄用。After approval, the record will become obsolete.

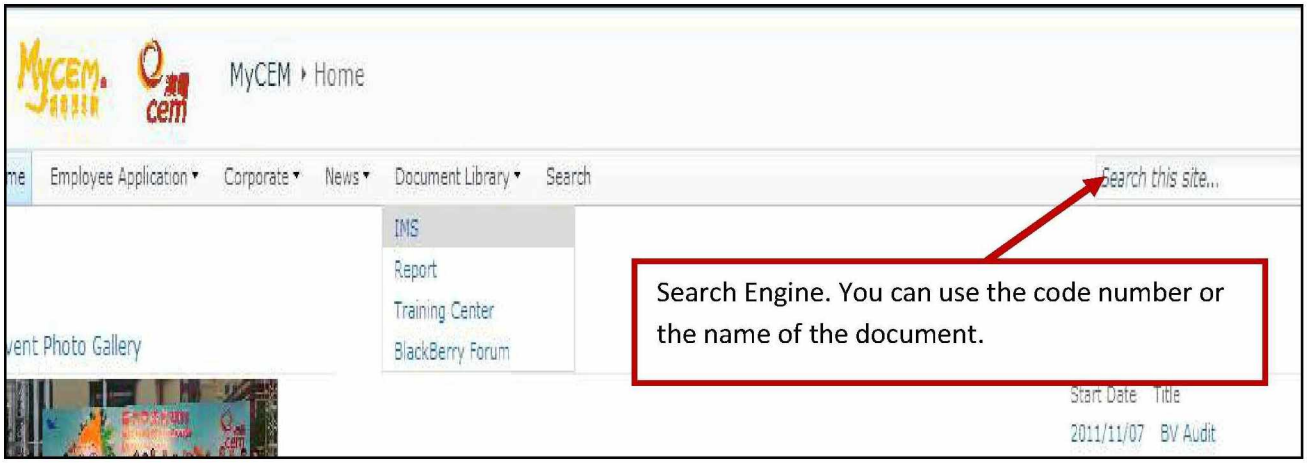
8 - IMS Library General FAQ

IMS Library

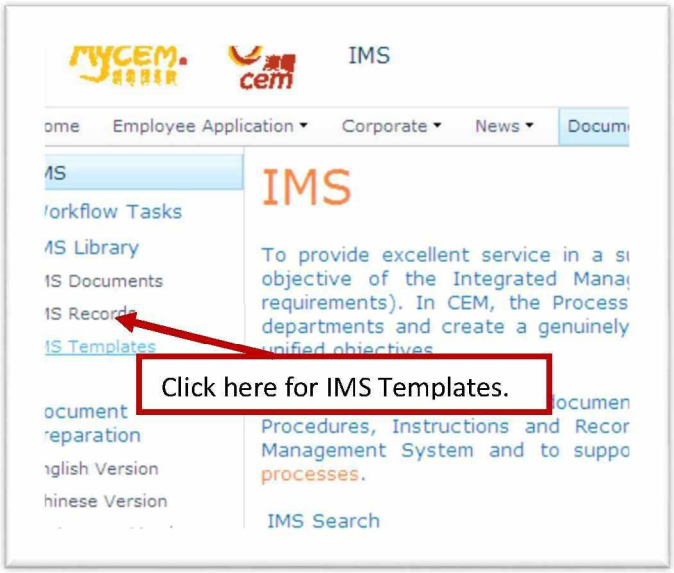
Frequent Asked Questions

Q1: Why can't I write/ revise a new IMS Instruction?
A: You need to be an authorized IMS writer. If you aren't, kindly create a log in Online HelpDesk (Application: IMS) to be granted this access. You need the approval of Senior Manager to be an IMS writer, and afterwards also need to inform SHEQ Office by email.

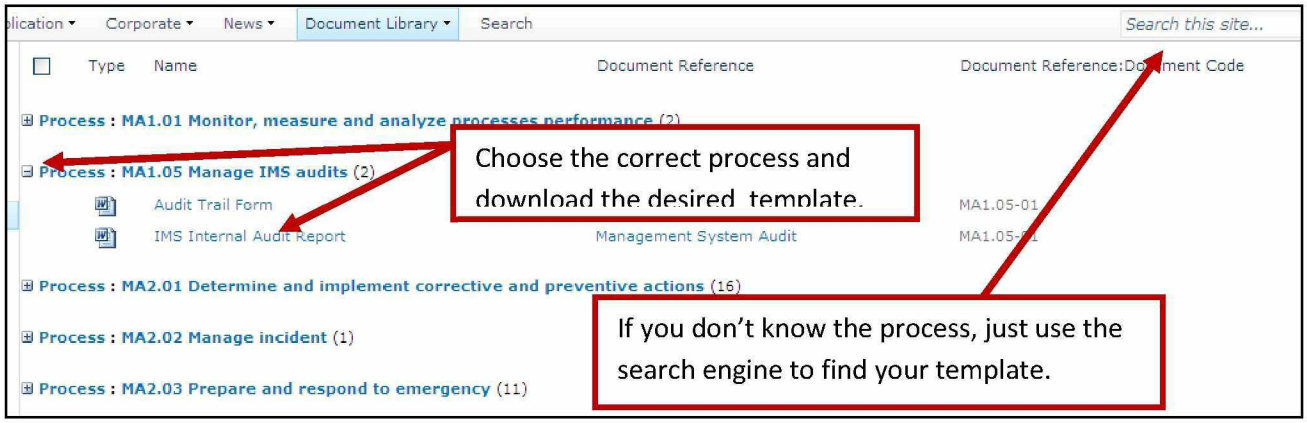
Q2: How do I find an IMS document in IMS Library?
A: The easiest way is to use the Search Engine of MyCEM.



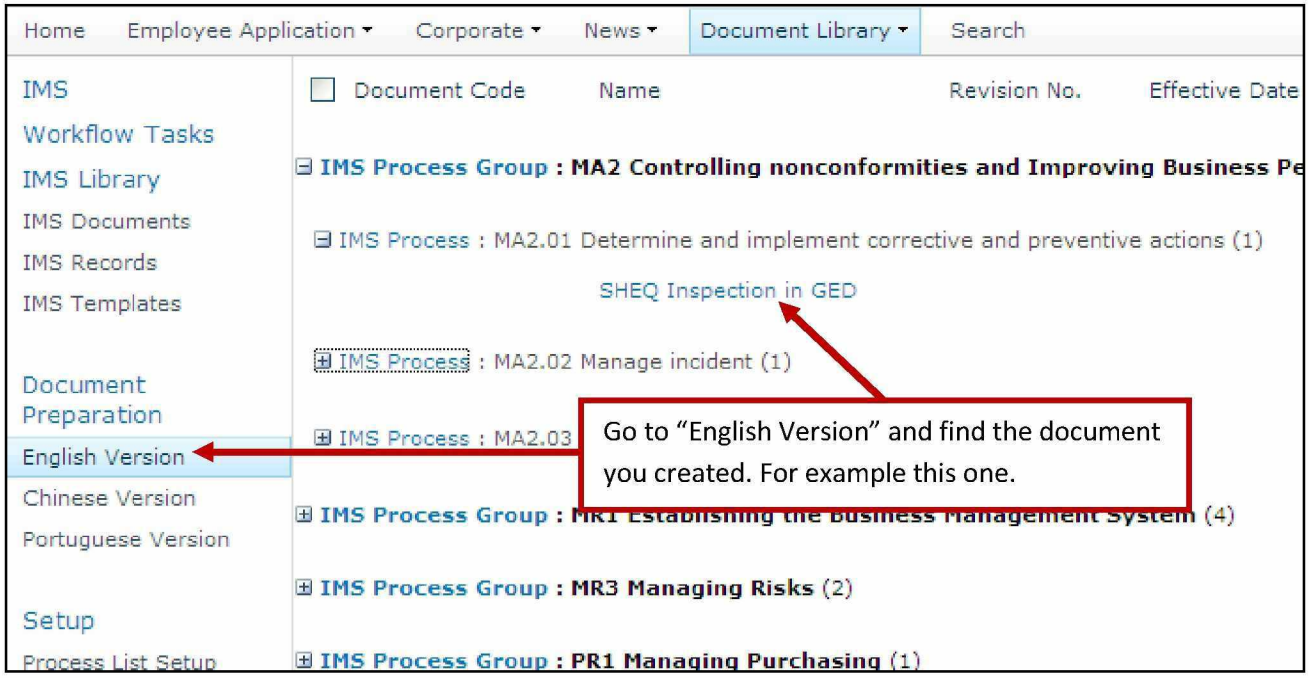
Q3: How do I find a template in IMS Library?
A: You will need to go to IMS Templates:



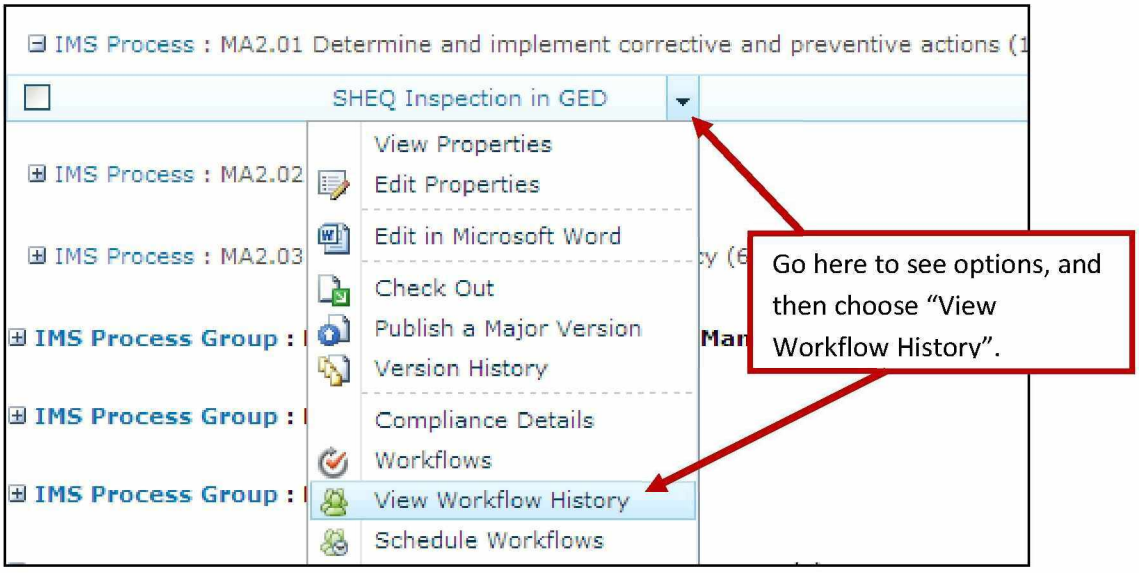
You will go to this window:



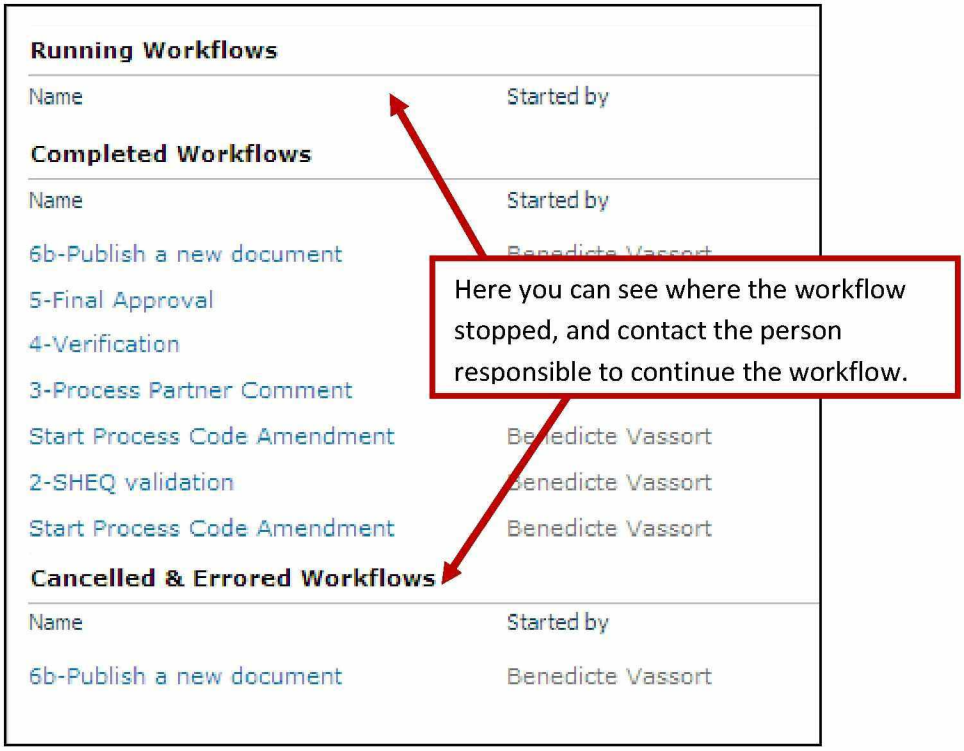
Q4: Why did the workflow of my IMS document stop before approval?
A: Probably someone didn't follow-up in the steps of the approval process. You can check the status of the workflow by doing this:



Then:



Then a new window will appear:



Q5: Do we need to keep signed hardcopies of the IMS documents?

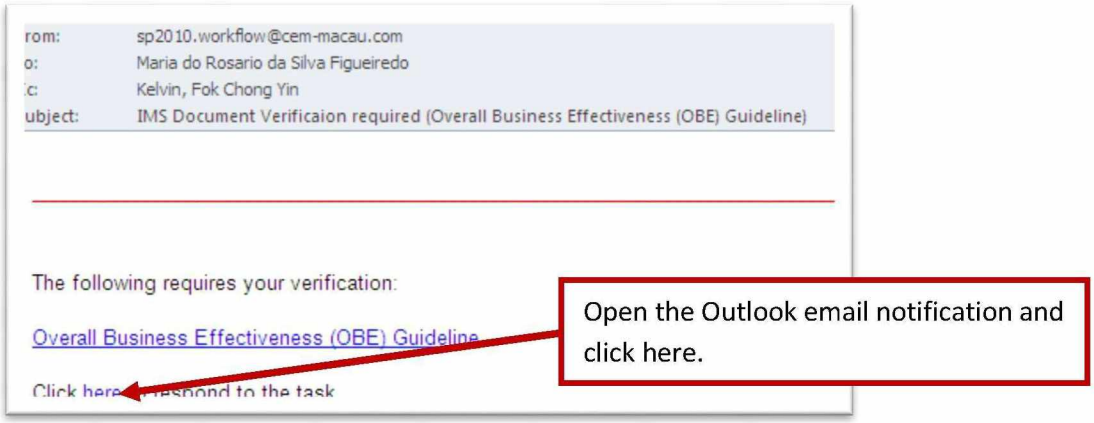
A: No. One of the ISO 9001 standard requirements states that all IMS documents, like Procedures, Instructions, Records like JHA, etc, must be verified and approved by relevant management.

This way, we needed to keep the hardcopies of IMS documents signed by the verifier and approver to follow this requirement. However, the new IMS Library approval process workflow is recorded in MyCEM, and can be used to prove that the IMS document was verified and approved by management. Therefore, there is currently no need to keep signed hardcopies of IMS documents anymore.

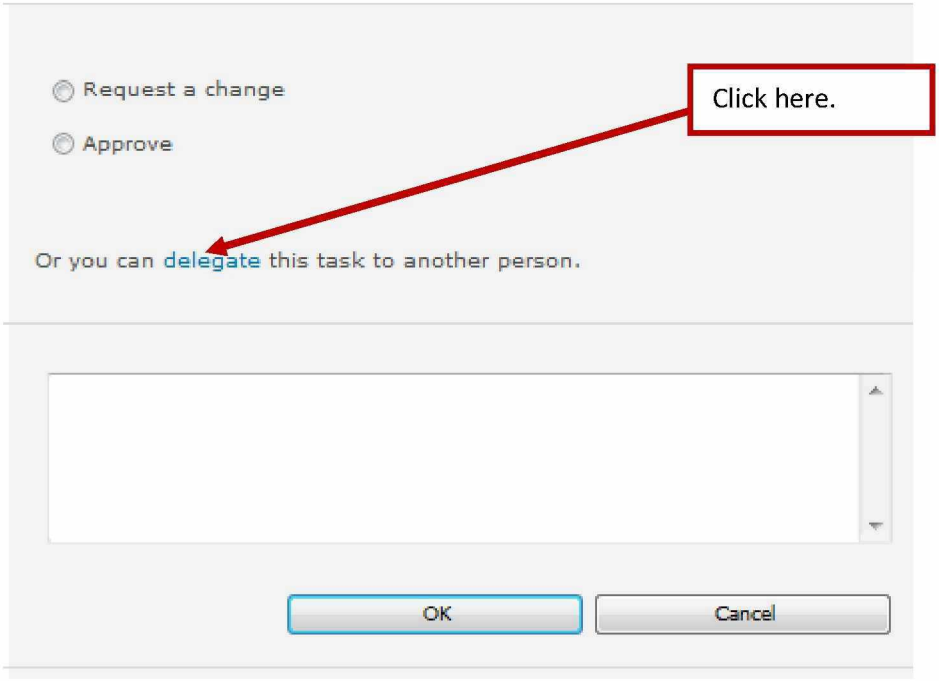
Q6: How can I request someone to comment a document during approval process?
A: This depends if you want to check first their comments or not.

<u>If you don't want to check their comments:</u>

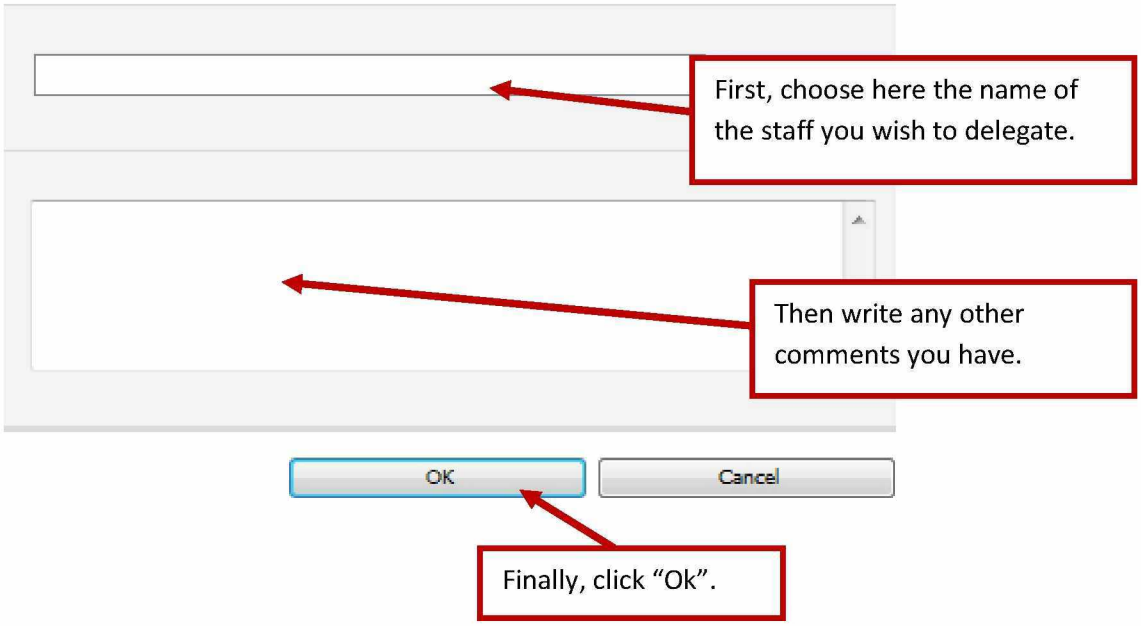
Please note if the staff you want to comment is not an IMS writer, you must follow the next set of instructions ("If you want to check their comments").



Then choose the option "delegation".



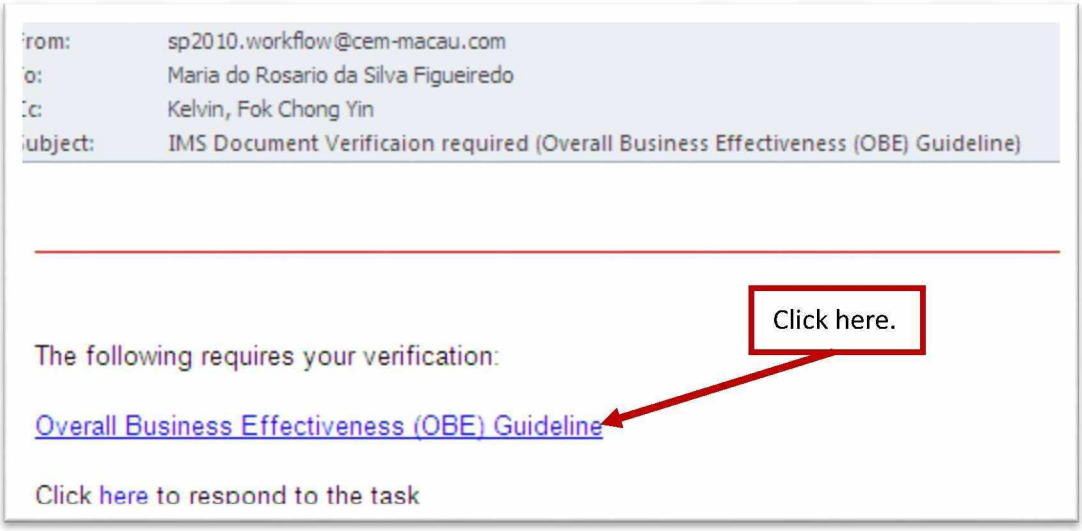
This window will appear:



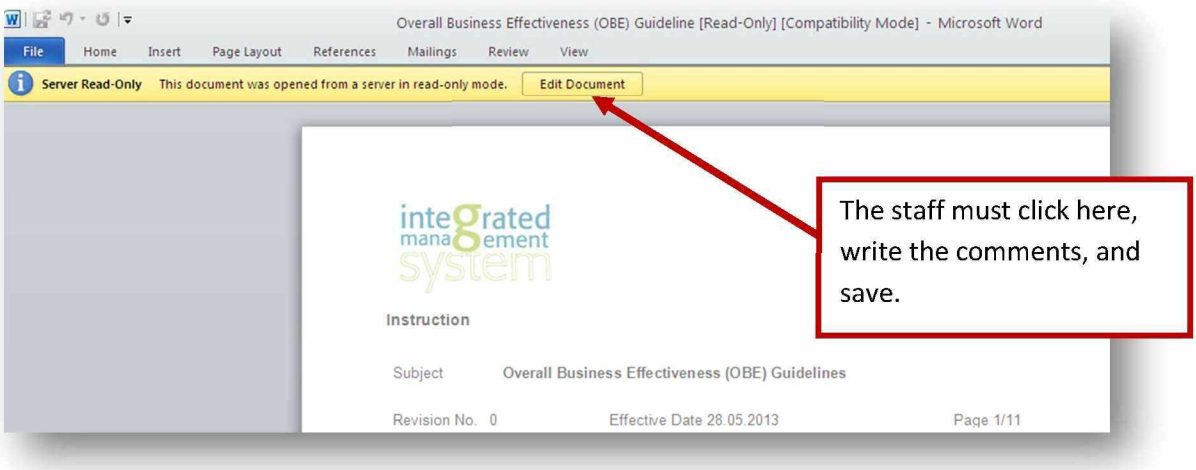
The workflow will go to the staff you chose and they will follow-up the process.

<u>If you want to check their comments:</u>

a) Just forward the email notification to the staff you wish.
b) Afterwards the staff will:



c) The document will open.

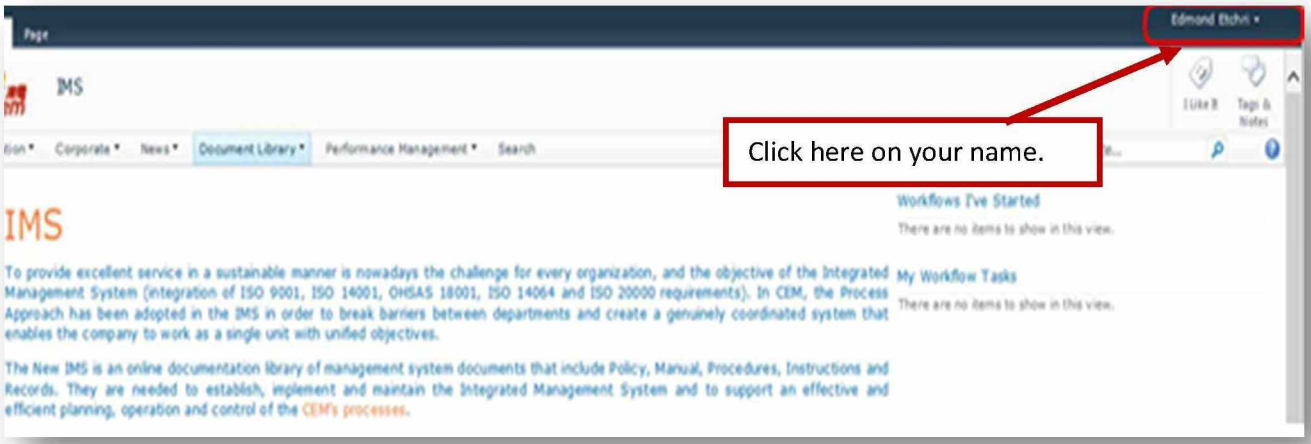


d) Then the staff must email to you to say the comments are in the document. Then you must follow points b) and c) and this way you can check the comments.

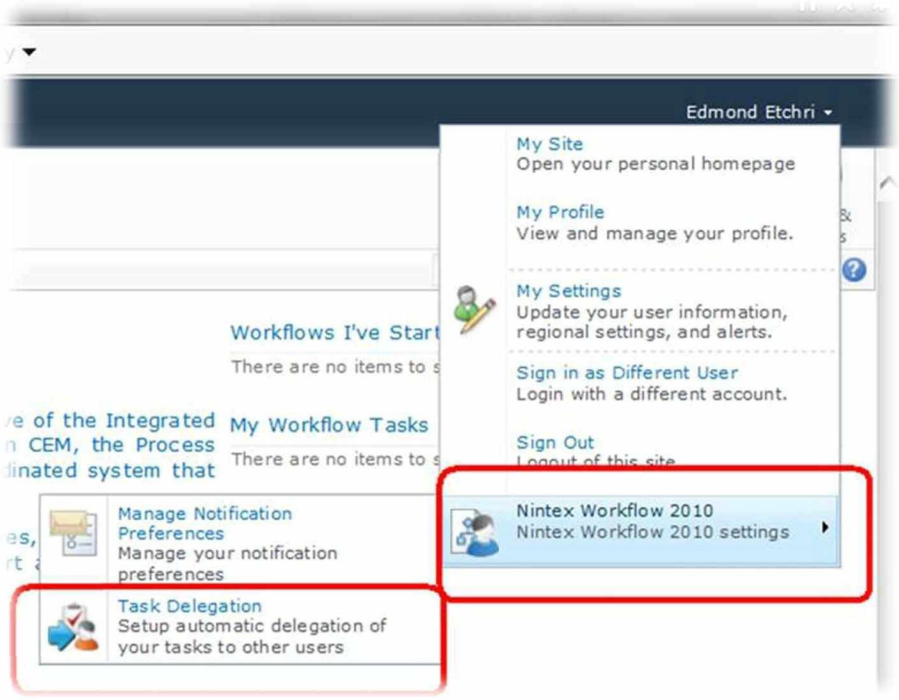
Q7: How can I do IMS approval delegation during leave? (Option for management only)

A: This function exists to avoid delays and gaps of information during approval process of IMS documents that occur during any type of leave of management staff.

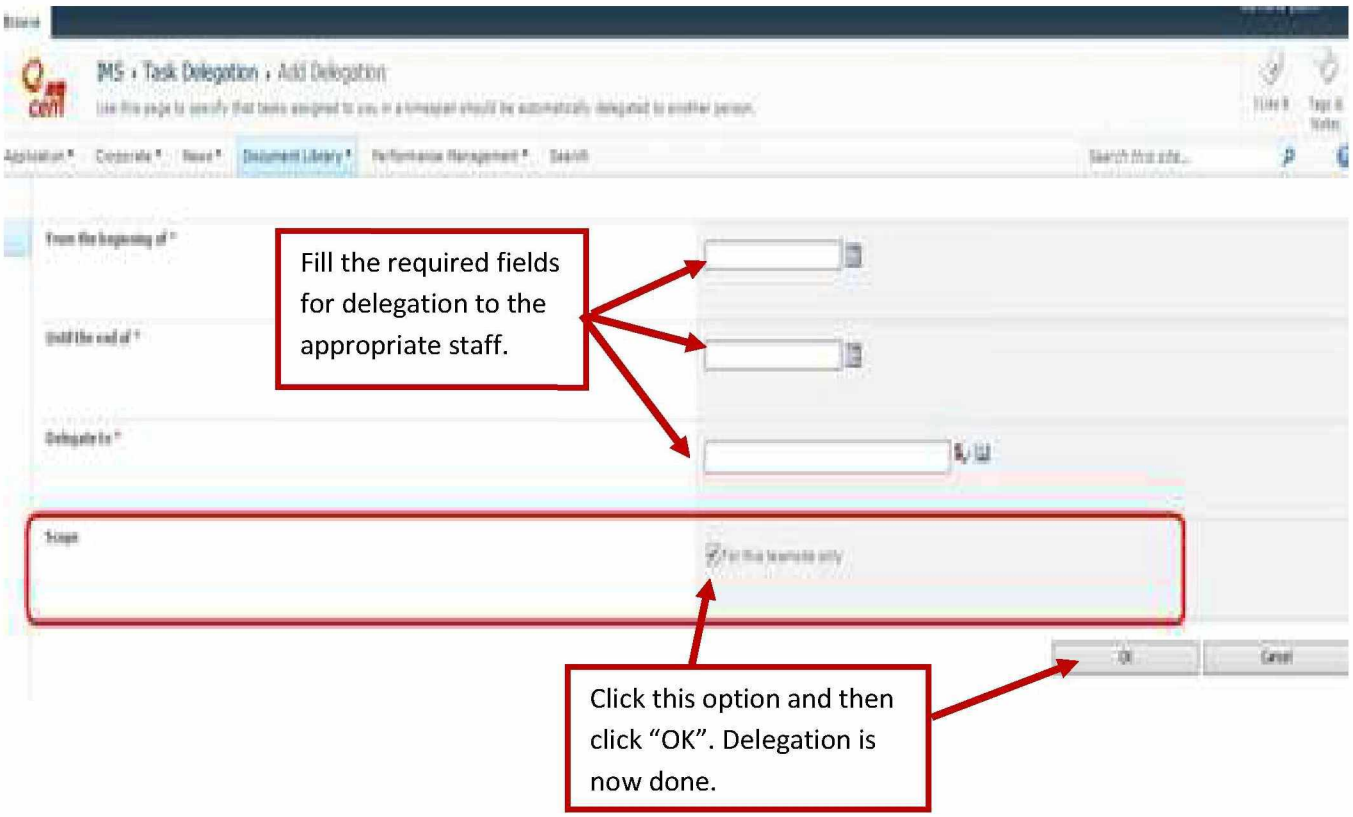
a) Go to IMS webpage.



b) Choose the “Task Delegation” option:



c) A new window will open.



9 - IMS Approval Workflow Process Logic

IMS Approval Workflow Process Logic

Control on creation, distribution, maintenance and disposal of management system documents (Refer to IMS Manual)

Documents	Creation					Distribution	Maintenance
	Prepared by	SHEQ Validation	Process Partner Comment	Verified by	Approved by	Notification list	Retention period
Policies (level I)	SHEQ Office	-	-	SHEQ Manager	CEO	EC + SM/M + Secretaries	3 years
IMS Manual (level I)	SHEQ Office	-	-	SHEQ Manager	IMS MR	EC + SM/M + Secretaries	3 years
Procedures (level II)	Process Owner	SHEQ Manager	If Any	SHEQ Manager	EC of Issuer	EC + SM/M + Secretaries	3 years
Instructions (by Department) (level III)	Process owner & Partners	SHEQ Manager	-	Process Owner	Issuer Approver (SM/UH)	SM+UH+ Secretary	3 years unless otherwise required or specified
Instructions (by EC) (level III)	Process owner & Partners	SHEQ Manager	If Any	Process Owner	EC of Prepared dept (Manual input)	SM+UH+ Secretary	3 years unless otherwise required or specified

Steps for Approval Process

1. **Start Approval Process workflow** when the document is ready
2. **SHEQ validation** (Content Type: Procedure, Instruction (by EC), Instruction (by Department))
3. **Process Partner comment**(Content Type: Procedure, Instruction (by EC))
4. All partners will receive the task notification with default 10 working days response time, otherwise the task will be skipped
5. **Verification** (All content types)
6. **Final Approval** (All content types)
7. **Document Publishing** (All content types)
8. For a new document, system will generate a document code for it and the effective date which is the next day of document approval date; or for revision document, system will only generate the effective date for it.
9. The workflow initiator will receive an email notification for final confirmation. After the initiator confirmed, the document will be copied/published to the IMS Documents library.
10. And the notification email will send to default notification list.