1. Introduction
2. How Potential Target Audience See the Event Announcements
3. Features of HKUEMS for Event Managers
4. How to Hide/show an Event in HKUEMS and HKU Website
5. Step-by-step Guide with Case Examples
6. Presentation on Enhancement of the HKUEMS held on January 14, 2013

Please refer to the ITS website for sections 1 – 4 and 6.

5. Step-by-step guide with case examples

Important Note: The HKUEMS should be used ONLY for events organized by HKU departments/units. For those talks and other events that individual academic staff members deliver at the invitation of external organizations, such data should be input by the individual staff in the Knowledge Exchange Activities System (KEAS) instead (login HKU Portal → “My Page” tab → “Self Service” → “Knowledge Exchange” → “KE Activities”).

The HKUEMS is best run with Internet Explorer version 6.0 or above. Problems such as inaccuracy may arise if other browsers are used to create or update event details.

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5.1 Navigation Path to the Manager Interface

(1) Log in to HKU Portal → Click the “Events” tab

(2) A list of today’s events will be shown. Click on the HKUEMS icon to log into the system.

(3) After logging into the system, click the “Manager” tab.
5.2 To Create an Event

(1) At the Manager interface, click “Create new events” on the navigation panel on the left, and then click “Single Session Event” or “Multiple Sessions Event” depending on the programme structure of your event.

(a) Single Session Event:
- For an event with only one session, e.g. a seminar or a public lecture (see Case Example 1), or an admission talk for student recruitment (see Case Example 2)
- For an event lasting for one day, e.g. a one-day conference (see Case Example 3)
- For an event that will be repeated with the same programme content on consecutive days, e.g. a workshop for different groups of participants (see Case Example 4)

(b) Multiple Sessions Event:
- For an event lasting for more than one day (not falling under the above categories for “Single Session Event”), normally with multiple sessions in the programme, e.g. a two-day conference (see Case Example 5)
- For a course with a few sessions conducted over a period of time (see Case Example 6)

**Important Note:** If one event or course lasts for more than one day, you should choose “Multiple Sessions Event”. Do NOT use “Single Session Event” to create a record for each day of your event because it may cause errors when data are extracted from the HKUEMS for reporting to the UGC.

(2) To create an event, you need to go through the following pages (note: Case Examples 1-6 in 5.3 illustrate the data input steps involved in different event scenarios):
- Event Details – to input event details such as event title, description, date, time, venue and event type, etc. (see 5.2.1 below)
- Enrolment Method – to input information such as registration instruction and payment method (see 5.2.2 below)
- Enrolment Form – to design your registration form (only if you want to use the HKUEMS for your registration process – see 5.2.3 below)

**5.2.1 To Create an Event – Event Details**

(1) Input the details of your event in the “Event Information” section. Notes on what to put in certain boxes are given below.

(a) **Event Type** – Data on certain types of events will be extracted from the HKUEMS for reporting to the UGC according to the UGC’s requirements. Please check carefully which of the following categories your event should fall into to ensure data validity:

- Admission Talk/Career Talk/Information Session/Open Day
- Ceremony/Press Conference/Media Event
- Continuing Professional Development Short Course
- Exhibition
- Other Event/Function
- Performance Arts (music, dance, drama etc.)
- Public Lecture/Forum/Seminar/Workshop/Conference/Symposium
In particular, please note the following:

- If your event, e.g. a talk, is primarily for the purpose of admission or recruitment of students, please choose “Admission Talk/Career Talk/Information Session/Open Day” rather than “Public Lecture/Forum/Seminar/Workshop/Conference/Symposium”.

- If your event is a course for training or professional development of particular target group(s), e.g. dentists, doctors, nurses, healthcare professionals, lawyers, social workers, staff of non-governmental organizations (NGOs) or government departments, etc., please choose “Continuing Professional Development Short Course” rather than “Public Lecture/Forum/Seminar/Workshop/Conference/Symposium”.

- Try to avoid choosing “Other Event/Function” indiscriminately.

(b) **Primary Target Audience** – Select up to two groups which you expect most participants will come from.

For example, if your target groups are nurses and healthcare professionals, dentists, lawyers, or social workers, etc., you should choose “Government/Industry/Non-Governmental Organization (NGO)/Professional Bodies”.

(c) **Expected Number of Attendees for All Sessions in the Event** – Give the best estimate based on similar events organized by your department in the past. Please remember to provide the actual number of attendees after the event by updating the Post-event page.

(d) **Expected Total Man-hours of HKU Academic Staff involved in the Event** –

As required by the UGC, please include only the time of HKU academic staff to be spent as a moderator, speaker, chairperson or panelist etc. DURING the event.

If more than one HKU academic staff will jointly deliver the event, the total amount of time should be input. Time committed to the preparation of the event or time spent by administrative staff and organizing committees should NOT be included. Time spent by guest speakers, moderators, chairpersons or panelists from outside HKU should NOT be included.

In accordance with the UGC’s definition of “Academic Staff” for the purpose of this data field, all professoriate staff (Professors, Associate Professors, Assistant Professors),
teaching staff (e.g. Teaching Consultants, Instructors, Teaching Fellows, Demonstrators, Tutors, Teaching Assistants, Fieldwork Supervisors) and research staff (e.g. Research Assistant Professors, Post-doctoral Fellows, Research Officers, Scientific Officers, Research Associates, Research Assistants) of HKU should be included.

(e) **Viewable By** – The system default is “Staff, Students and Public”. If you do not wish to have your event viewed by the public, you can select another option or choose a specific group of viewers within the University from the pull-down menu. The event will then not be displayed on the HKU homepage or the “Weekly Notice for Media”, but only on the HKUEMS for your selected group(s).

(2) After completing the “Event Information” section, scroll down to check the information of the contact person and input the **Departmental Email**, which must be different from the contact person’s email. Only the email of the contact person will be shown on the viewer’s page. The departmental email will be used as an additional recipient address for the system-generated post-event email reminders for those chargeable events where the HKUEMS had been used for registration of attendees.

(3) Input information on the sessions and/or programme within each session of your event as follows (see 5.2(1) above on how to choose between these two interfaces based on the programme structure of your event):

- If you are using the **Single Session Event** interface, the “Programme within Each Session” is optional. You can leave it out and click “Next” to proceed to the “Enrolment Method” page.

- If you are using the **Multiple Sessions Event** interface, you need to complete the section on “Session”. Input the date, time and venue as well as details of each session of your event and if necessary, the programmes within each session. Click
“…” on the right below “Session” to add the next session with date, time and venue. After you have finished, click “Next” to proceed to the “Enrolment Method” page.

5.2.2 To Create an Event – Enrolment Method

(1) Select registration method:

- **Yes (by HKUEMS)** – Registration instruction will be shown on the viewer’s page and people can register through HKUEMS. See further steps at (2) below.

- **Yes (display Registration Instruction only)** – input the registration instruction, payment instruction (if applicable) and registration URL (if any). People **cannot** register through the HKUEMS. This essentially means that you have another platform or other means for people to register.

Click “Commit” at the bottom of the page and the event post will be created on the HKUEMS. Go to the “Manage active events” interface to turn it “online” when appropriate (see “To Manage Active Event” at 5.2.4 below).

*Display on the viewer’s page:*
- **No** – “Registration is not required” will then be shown on the viewer’s page. Click “Commit” at the bottom of the page and the event post will be created on the HKUEMS. Go to the “Manage active events” interface to turn it “online” when appropriate (see “To Manage Active Event” at 5.2.4 below).

**Display on the viewer's page:**

```
Registration Instruction
Registration is not required.
```

(2) **IF** you have selected “Yes (by HKUEMS)”:

(a) Input your registration instruction (optional), and it will be shown under “More registration instructions” on the viewer’s page.

**Display on the viewer’s page:**

```
Registration Instruction
Registration is open from 18/11/2013 09:00(HKT) to 24/11/2013 10:00(HKT) on a first-come-first-served basis.
More registration instructions
For current staff and students of the 8 UGC-funded institutions, the registration fee is waived. The attendees will be required to present the email confirmation of registration for admission.
```

(b) The system default is shown below but you can select “Yes” if un-registration is allowed and if you wish to receive email notification when there is registration, cancellation or payment.
(c) Select the appropriate Enrolment Mechanism for your event:

- **first-come-first-served** – if necessary, you can set admission quota and waiting list quota (when number of registrant exceeds the quota, any new registrant will be put on the waiting list, and you may approve or disapprove the registrations manually in the “Enrollment List Management” page (see 5.4 below).

- **selection** – you can leave out the boxes below, but if necessary, you can set the quota and then select to approve or disapprove the registrations in the “Enrollment List Management” page (see 5.4 below).

(d) Set the Registration Period.

(e) Select Payment method:

*Note: The “Payment” section will become available for input only if “Yes (by HKUEMS)” is selected in the “Enrolment Method” section. If you select “Yes (display Registration Instruction only)”, you have to input payment instructions (if applicable) in the “Registration Instruction” box instead.)*

- **No Payment Required** – no information on payment method will be shown on the viewer’s page.
- **Display Payment Instruction Only** – only payment instruction will be shown on the viewer’s page. People will **not** be directed to the payment gateway through the HKUEMS.

![Payment Instruction Only](image)

**Display on the viewer’s page:**

![Payment Information](image)

- **Payment Required** - payment details will be shown on the viewer’s page and people can make payment by credit card online. Please make sure that your department has already opened a merchant account **before** selecting this option. Please contact the Finance and Enterprises Office (FEO) to apply for a merchant account well in advance.

![Payment Information](image)

**Display on the viewer’s page:**

![Payment Information](image)

- Press “Next” to proceed to the “**Enrolment Form**” page (see 5.2.3 below).
If you have selected “Yes (by HKUEMS)” in the “Enrolment Method” page, you will be directed to this page to design the registration form of your event. The upper part is the type-in area and the lower part shows you the preview of your registration form as you go along.

1. Input “Heading in Registration Form” (optional). It will be shown on the online registration form underneath the title of your event.

2. Some pre-set fields in the registration form will appear under “Caption”. Tick those you want for your registration form under “Caption”, e.g. Name, Department/Faculty, Organization, etc. “E-mail” is a default field. You can also add more fields by clicking “…” (see (6) below) and type the information you need, e.g. “Degree Registered”.

3. Select the appropriate “Field Type” for each caption.

<table>
<thead>
<tr>
<th>Type</th>
<th>Function</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text Box</td>
<td>For free text</td>
<td>Organization</td>
</tr>
<tr>
<td>Check Box</td>
<td>For indication/declaration</td>
<td>☑️ I agree to put my presentation video on Youtube for public viewing.</td>
</tr>
</tbody>
</table>

Note: There is a word limit for text. Please make sure your
statement(s) is/are not too long. You are advised to check the form as a viewer after you have finished creating the event post (see 5.2.4 below).

<table>
<thead>
<tr>
<th>Radio Button</th>
<th>For multiple choices</th>
<th>Degree registered</th>
<th>○ PhD ○ MPhil</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combo Box (i.e. a drop-down list)</td>
<td>For multiple choices</td>
<td>Salutation*</td>
<td>Mr. □</td>
</tr>
<tr>
<td>Text Area</td>
<td>For longer free text</td>
<td>Address</td>
<td></td>
</tr>
</tbody>
</table>

(4) In “Default Value”, input the choices allowed for registrants. Separate each choice by a **semi-colon and space** (e.g. PhD; MPhil).

(5) If any fields must be filled by a registrant, click the square boxes next to the column “Default Value”. Such compulsory fields will then be marked with “*” on the registration form.

(6) Add or delete a caption by clicking the  or  as necessary.

(7) Click “Commit” at the bottom of the page and the event post will be created on the HKUEMS. Go to the “Manage active events” interface to turn it “online” when appropriate (see “To Manage Active Event” at 5.2.4 below).

Display on the viewer’s page:

--- Optional heading input re. (1) above
5.2.4 To Manage Active Events

The upcoming events that you have created will be listed on “Manage active events”. The functions provided by the system in managing the event posts are as follow:

- **Online/Tentative/Offline** – to manage the status of a specific event post created:
  - “online”: to publish the event post and it is viewable by your selected user group(s);
  - “tentative”: to publish the event post but it is only viewable on the HKUEMS by your department and CPAO; or
  - “offline”: not viewable by any user.

  **A newly created event post will be put offline automatically, so you have to turn it online manually to publish it on the HKUEMS.** Alternatively, you can use the new Hide or Show function for the same purposes (see section 4 of User Guide on ITS website).

- **Edit** – to go back to make changes on a specific event post

- **Delete** – to delete the event post permanently

- **HKU Bulk E-mail Submission** – to be directed to the bulk email system and send emails to different groups in HKU. If you want to send emails only to enrollers, please go to the “Enrollers” page instead.

**Note: Event URLs** – Please refer to the instructions on the “Event URLs” interface to get the correct URLs for your event and your registration form (if applicable) respectively before issuing a bulk mail within the University or an announcement outside the University.
- **Enrollers** – to be directed to the “Enrollment List Management” page, which allows you to get the registration list of an event that requires registration via the HKUEMS, to manage the status of registrants and to send emails to registrants (see 5.4 below)

- **Register** – to review the registration form created for a specific event

### 5.2.5 To Complete the Post-Event Page

Your past events are listed in “View past events”. You should **input the required data after an event at the Post-event page for internal reporting to the University and external reporting to UGC** as follows:

1. On the list of past events, click the 🎉 icon at the end of the thread of an event to arrive at the Post-event page of that particular event. Input the **actual number of attendees**. To make the task of counting the audience numbers as simple as possible for event managers, if the event is a “Multiple Sessions Event”, please count the actual number of attendees in each session or each day and add them together to report the total number.

2. If it was a **chargeable event**, input the **total income and expenditure** as well.

**Note:** An automatic email reminder will be sent to the event manager concerned one month after a chargeable event **only** in cases where the HKUEMS was used for registration of attendees. For a chargeable event that did not use the registration facility of the HKUEMS, there will **not** be any system generated email reminders and the **event manager should follow up with such data input after the event himself/herself**.
(3) Click “Submit” when finished.

**Important Note:** All event managers should update the Post-event page of their events in a timely manner to ensure that the data to be extracted from the HKUEMS in early July each year for reporting to the UGC would be as complete and accurate as possible. Failure to update the Post-event page may lead to under-reporting in the University’s submission of the relevant performance indicators to the UGC.
5.3 Case Examples

The 6 Case Examples below illustrate the data input steps involved in different event scenarios. The details relating to logistic arrangements in these Case Examples are for the purpose of illustration only, and may not be practical for implementation in some events.

5.3.1 Case Example 1: A Seminar

Assumptions: An event with one session mainly for academics as well as university students with registration by other means required

(1) Go to “Create new events” and select “Single Session Event”.

(2) Input details of the event in the “Event Information” page.

(3) Keep the default “No” for “Repeating Event”; and select “Public Lecture/Forum/Seminar/Workshop/Conference/Symposium” for “Event Type”.

(4) For “Primary Target Audience”, tick the boxes “Academics and Researchers” and “HKU/Other University Students”, which are considered to be the main target audiences of the event.

(5) Input the “Expected Number of Attendees for All Sessions in the Event” based on your best estimate.

(6) Input the “Expected Total Man-hours of HKU Academic Staff involved in the event” (note the UGC’s definition of “Academic Staff” and the specific man-hours requirement for this purpose [see 5.2.1(1)(d) above]). For example, if the event is for one hour and both the speaker and the moderator are academic staff members of HKU, input “2”. However, input “1” if only the moderator falls within the UGC’s definition of “Academic Staff” but the speaker is from outside HKU or does not fall within the UGC’s definition of “Academic Staff” for this purpose.

(7) Keep the default “Staff, Students and Public” under “Viewable By” if the event is open to the public or if you want the event to be shown on the HKU homepage.

(8) Scroll down to input the “Departmental Email”.

(9) Skip the section under “Programme within Each Session” if it is not necessary to show viewers the detailed programme, and press “Next”.
(10) At the “Enrolment Method” page, select “Yes (display Registration Instruction only)” under “Require Registration?” and input the registration instruction as well as the URL (if available).

(11) Press “Commit”.

(12) Follow the remaining steps as described in 5.2.4 above (To Manage Active Events).

(13) After the event, input the **actual number of attendees** at the Post-event page (see 5.2.5 above).

**Input at the Manager’s interface:**

![Event Information]

--- Keep the default “No” for an event that will be held on one occasion only.

--- Select the appropriate event type.

--- Select up to two groups of people who are your main targets for the event.

--- View UGC’s definitions at the icon.

--- Input “1” if only the moderator is from HKU and within UGC’s definition of “Academic Staff” for this purpose. The speaker’s man-hour in this example is not counted as he is from outside HKU.

--- Choose whether to have the registration made on HKUEMS or by other means. Here it means that registration should be made by email.

**Display on the viewer’s page:**
5.3.2 Case Example 2: An Admission Talk

Assumptions: An event with one session for admission/student recruitment purpose with secondary school students as the main target audience and no registration required

(1) Go to “Create new events” and select “Single Session Event”.

(2) Input details of the event in the “Event Information” page.

(3) Keep the default “No” for “Repeating Event”; and select “Admission Talk/Career Talk/Information Session/Open Day” for “Event Type”.

(4) Tick the box “Primary/Secondary School Teachers/Students” for “Primary Target Audience”.

(5) Input the other compulsory fields (see 5.2.1 above).
(6) Press “Next” to go to the “Enrolment Method” page.

(7) Select “No” for “Require Registration?” and click “Commit”.

(8) Follow the remaining steps as described in 5.2.4 (To Manage Active Events) and 5.2.5 (To Complete the Post-Event Page) above.

*Input at the Manager’s interface:*

![Image of event manager interface]

- Select the appropriate event type.

*Display on the viewer’s page:*

![Image of viewer page]

Admission Talk for Secondary School Students

Posted by Knowledge Exchange Office for HKU and Public

Event Type: Admission Talk/Career Talk/Information Session/Open Day
Event Nature: Others

Event Details

An admission talk for form 5 students from secondary schools who are interested in entering HKU in the upcoming academic year

Date/Time: 14/07/2014 16:00-17:00
Venue: Loke Yew Hall
Language: English

Registration Instruction

Registration is not required.
5.3.3 Case Example 3: A One-day Conference

Assumptions: **A one-day event mainly for academics as well as government officers and NGOs with registration by other means and payment required**

(1) Go to “Create new events” and select “**Single Session Event**”.

(2) Input details of the event in the “Event Information” page.

(3) Keep the default “**No**” for “Repeating Event”; and select “**Public Lecture/Forum/Seminar/Workshop /Conference/Symposium**” for “Event Type”.

(4) For “Primary Target Audience”, tick the boxes “**Academics and Researchers**” and “**Government/Industry/Non-Governmental Organization (NGO)/Professional Bodies**”, which are considered to be the main target audiences of the event.

(5) Input the “Expected Number of Attendees for All Sessions in the Event” based on your best estimate.

(6) Input the “Expected Total Man-hours of HKU Academic Staff involved in the event” (note the UGC’s definition of “Academic Staff” and the specific man-hours requirement for this purpose [see 5.2.1(1)(d) above]). For example, if there are 6 speakers who are academic staff members of HKU and 4 speakers from overseas or other local institutions, each giving a talk of 30 minutes, and 3 moderators/chairpersons who are academic staff members of HKU, each chairing a session of 30 minutes, count only those who are HKU academic staff and input “4.5”.

(7) Scroll down to input the “Departmental Email”.

(8) Input the details of the programme under “Programme within Each Session” if necessary. Press “**” to add programmes. When finished, press “Next”.

(9) At the “Enrolment Method” page, select “**Yes (display Registration Instruction only)**” under “Require Registration?” and input the registration and payment instructions under “Registration Instruction” as well as the URL under “Registration URL”.

(10) Press “Commit”.

(11) Follow the remaining steps as described in 5.2.4 above (To Manage Active Events).
(12) After the event, input the **actual number of attendees** as well as the **total income and total expenditure** at the Post-event page (see 5.2.5 above).

**Input at the Manager’s interface:**

--- View UGC’s definitions at the icon.

--- Press the “+” button on this bar to get the fields below. Input is optional.

--- This means that there is an online registration platform at the URL.

**Display on the viewer’s page:**
5.3.4 Case Example 4: A Workshop to be Repeated for Several Groups of Participants

Assumptions: An event to be held on consecutive days with the SAME content to be repeated for several groups of HKU research postgraduate students with registration via the HKUEMS required and admission quota

(1) Go to “Create new events” and select “Single Session Event”.

(2) Input details of the event in the “Event Information” page.

(3) Select “Yes” for “Repeating Event” and input the start date and end date of the consecutive period during which the repeating sessions of the event will be held.

(4) Select “Public Lecture/Forum/Seminar/Workshop/Conference/Symposium” for “Event Type”.

(5) Tick the box “HKU/Other University Students” for “Primary Target Audience”.

(6) Input the “Expected Number of Attendees for All Sessions in the Event” based on your best estimate or admission quota.
(7) Input the “Expected Total Man-hours of HKU Academic Staff involved in the event” (note the UGC’s definition of “Academic Staff” and the specific man-hours requirement for this purpose [see 5.2.1(1)(d) above]).

(8) Tick the box “Specific Group” and select “HKU Postgraduate – Research” from the drop-down list for “Viewable By”.

(9) Scroll down to input the “Departmental Email”.

(10) Input the details of the programme under “Programme within Each Session” if necessary. Press “.utf8” to add programmes. When finished, press “Next”.

(11) At the “Enrolment Method” page, select “Yes (by HKUEMS)” for “Require Registration?”, choose the appropriate enrolment mechanism, input an appropriate number in the field “Set Admission Quota”, and set the registration period.

(12) Press “Next” to go to the “Enrolment Form” page and design the registration form (see 5.2.3 above).

(13) Press “Commit” after creating the registration form.

(14) Follow the remaining steps as described in 5.2.4 above (To Manage Active Events).

(15) After the event, input the actual number of attendees at the Post-event page (see 5.2.5 above).

**Note:**
- If the event with the same content will be repeated for several groups of participants but are not scheduled for consecutive days, please create the event using the “Multiple Sessions Event” interface instead.
- Events held for more than one day with different contents should be created under the “Multiple Sessions Event” interface instead. Please see Case Examples 5 and 6 below.

*Input at the Manager’s interface:*
--- Select “yes” only for events held on consecutive days with the same content for several groups of participants.

--- If necessary, limit the group of viewers by selecting “Specific Group”.

--- View UGC’s definitions at the icon.

Display on the viewer’s page:
5.3.5 Case Example 5: A Two-day Conference

Assumptions: A chargeable event lasting for more than one day mainly for government officers and NGOs as well as the general public with registration via the HKUEMS and online payment

(1) Go to “Create new events” and select “Multiple Sessions Event”.

(2) Input details of the event in the “Event Information” page.

(3) Select “Public Lecture/Forum/Seminar/Workshop/Conference/Symposium” for “Event Type”.

(4) For “Primary Target Audience”, tick the boxes “Government/Industry/Non-Governmental Organization (NGO)/Professional Bodies” and “General Public”, which are considered to be the main target audiences of the event.

(5) Input the “Expected Number of Attendees for All Sessions in the Event” based on your best estimate.
(6) Input the “Expected Total Man-hours of HKU Academic Staff involved in the event” (note the UGC’s definition of “Academic Staff” and the specific man-hours requirement for this purpose [see 5.2.1(1)(d) above]). For example, if there are 15 speakers who are academic staff members of HKU and 10 speakers from overseas or other local institutions, each giving a talk of 30 minutes, and 8 moderators/chairpersons who are academic staff members of HKU, each chairing a session of 90 minutes, count only those who are HKU academic staff members and input “19.5”.

(7) Scroll down to input the “Departmental Email”.

(8) Input the dates, time and venue as well as the detailed programmes under “Session”. Press the on the right to add another session and continue until all sessions on both days of the conference are covered. If necessary, press the at the bottom of a session to add programmes within the session.

*Input at the Manager’s interface:*

(9) When finished, press “Next” to proceed to the “Enrolment Method” page.

(10) Select “Yes (by HKUEMS)” for “Require Registration?”, choose the appropriate enrolment mechanism, and set the registration period.

(11) Select “Payment Required” and input the necessary details. This means that you accept payment by credit card online. Please check that your department has already opened a merchant account and informed FEO before selecting this option.

(12) Press “Next” to proceed to the “Enrolment Form” Page and design the registration form (see 5.2.3 above).
(13) Press “Commit” after creating the registration form.

(14) Follow the remaining steps as described in 5.2.4 above (To Manage Active Events).

(15) After the event, input the actual number of attendees as well as the total income and total expenditure at the Post-event page (see 5.2.5 above).

Display on the viewer’s page:
5.3.6 Case Example 6: A Continuing Professional Development (CPD) Short Course

Assumptions: An event that is a CPD short course with sessions to be held over a period of time with registration by other means and payment required

Note:

- UGC’s definition of CPD courses: training programmes for learners already in work who are undertaking the course for purposes of professional development/ upskilling/ workforce development, i.e. it does NOT relate to undergraduate courses where students go on placement. Mainstream teaching activities, on-the-job professional support or consultancy provided on a retainer/contingency basis, and sub-degree courses are excluded.

- If your event is a CPD course, you should choose “Continuing Professional Development Short Course” rather than “Public Lecture/Forum/Seminar/Workshop/Conference/Symposium” under “Event Type”. Otherwise, there may be errors when the data are extracted for reporting to the UGC.
(1) Go to “Create new events” and select “Multiple Sessions Event”.

(2) Input details of the event in the “Event Information” page.

(3) Select “Continuing Professional Development Short Course” for “Event Type”.

(4) Input the pop-up field on “Expected Total Number of Hours Spent by EACH Student/Attendee in Contact with the Teaching Staff for the Whole Course”. For example, if each student should spend 18 hours in the whole course, input “18”.

(5) Select the appropriate “Primary Target Audience”. If the CPD course is for dentists, doctors, nurses, healthcare professionals, lawyers, social workers, staff of NGOs or government departments, or any other professionals, select “Government/Industry/Non-Governmental Organization (NGO)/Professional Bodies”.

(6) Input the “Expected Number of Attendees for All Sessions in the Event” based on your best estimate of student enrolments.

(7) Input the “Expected Total Man-hours of HKU Academic Staff involved in the event” (note the UGC’s definition of “Academic Staff” and the specific man-hours requirement for this purpose [see 5.2.1(1)(d) above]). For example, input “18” if there are one Assistant Professor and one Teaching Consultant each teaching 9 hours in the whole course. However, if one Assistant Professor and one non-academic staff member of HKU as well as someone outside HKU will each teach 6 hours in the whole course, input “6”.

(8) Scroll down to input the “Departmental Email”.

(9) Input the dates, time and venues as well as the detailed programmes under “Session”. Press “+” on the right to add all sessions with dates, time and venues of the course. When finished, press “Next” to proceed to the “Enrolment Method” page.

(10) At the “Enrolment Method” page, select “Yes (display Registration Instruction only)” under “Require Registration?” and input the registration and payment instructions under “Registration Instruction”.

(11) Press “Commit”.

(12) Follow the remaining steps as described in 5.2.4 above (To Manage Active Events).

(13) After the event, input the actual number of attendees as well as the total income and total expenditure at the Post-event page (see 5.2.5 above).
**Input at the Manager’s interface:**

![Event Information](image)

---

This field will pop up when CPD course is selected as the event type. Enter the no. of hours EACH student should spend in contact with the teaching staff in the whole course here.

---

Define the event nature based on the discipline of the course.

---

Choose your target groups for the course, who should be learners already in work.

---

Refers to the total teaching hours of the instructor(s) who are academic staff members of HKU in the course. See calculation in point (7) above in this Case Example. View UGC’s definitions at the icon.

---

Choose your target groups for the course, who should be learners already in work.

**Display on the viewer’s page:**

![Session Information](image)
Influenza Control and Management Course

Event Details

Continuing Professional Development (CPD) course on influenza control and management from a regional perspective for medical institutions and healthcare professionals

<table>
<thead>
<tr>
<th>Language</th>
<th>English</th>
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</thead>
<tbody>
<tr>
<td>Session 1</td>
<td>Influenza Surveillance and Prevention</td>
</tr>
<tr>
<td></td>
<td>16/03/2014 10:00-11:00</td>
</tr>
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<td></td>
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<tr>
<td>Session 2</td>
<td>Influenza Control Strategies</td>
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<td>Rapid Diagnosis and Treatment</td>
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<td>Session 4</td>
<td>Regional Influenza Control</td>
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<td></td>
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<td>03/05/2014 10:00-13:00</td>
</tr>
<tr>
<td></td>
<td>at P6-03, Graduate House</td>
</tr>
</tbody>
</table>

Registration Instruction

Please register online by March 10, 2014. The course fee of HK$3,000 should be paid by cheque made payable to “The University of Hong Kong”, which should reach the Knowledge Exchange Office by March 13, 2014.

5.4 To Manage Enroller Records

As mentioned above, if your event requires registration via the HKUEMS, an enroller’s icon “…” will appear in the thread of your event in the “Manage Active Events” page. Click on the icon and you will be directed to the “Enrollment List Management” page which allows you:

(1) To get the registration list
(a) Select the group of enrollers you need from “Enrollment list” and “Enrollers with remarks”. Click “Submit”.
(b) The list of registrants with details under the fields you set in the registration form will then be shown.

(2) To manage the status of the registrants

(a) Check the boxes in the threads of the registrants on the list.
(b) If necessary, click the “Approve”, “Wait-list” and “Disapprove” buttons at the bottom. The status of the registrants will then be changed accordingly.

(3) To send emails to registrants

(a) Click “Email to Selected Enrollers” to arrive at the screen above.
(b) Select the enrollers to whom you want to send the email acknowledgement.
(c) Select an email template or fill in the information in the following fields:
   - “Name in English” – Input the identity of the sender to be displayed in the registrant’s email (in this example, Knowledge Exchange Office)
   - “Reply-to Address” – Input the email address(es) which the enrollee(s) can use to reply to the email acknowledgement. In the email received by a registrant, it will be displayed right next to the sender as well as the “To” field in the registrant’s email (the registrant’s email address will be in the “Bcc” field).
   - Input the “Subject” and your email content.
(d) If necessary, you can save the draft email as an email template by clicking “save” at the top right hand corner. You can access the template at “Manage email templates” at the navigation panel on the left and reuse it in future.
(e) Click “Send”.
(f) You can check your email records by clicking “View email record” at the navigation panel on the left of the interface.

In the registrant’s email:

```plaintext
From: Knowledge Exchange Office <deoffice@hk.edu.hk>
To: Registrant
Cc: 
Subject: One more step to complete the 3MT registration process

** This email may contain multilingual content. If there are any non-English characters not properly displayed, you will need a mail client, such as Webmail or MS Outlook, that supports "Unicode" (UTF-8) to properly view this email.

Dear Registrant,
Thank you for your interest in participating in 3MT 2014.
```

### 5.5 To Create Templates for Regular Events

Event managers may have events that are organized regularly. The EMS allows event managers to create reusable templates for events. With these templates, event managers can handle such regular work much faster.

The steps to create and manage event templates are as follows:
1. Go to the “Manage active events” or “View past events” interface.
2. Tick the box of the event that you would like to save a template for.
3. Press the button “Save selected as Event Templates” at the bottom of the list.

(4) Go to the “Manage event templates” interface and you can find the event post that has been saved as a template.
(5) To reuse the template to create a new event post, click “>Create event” under “Actions”.

(6) You can also edit the template itself by clicking “>Edit” under “Actions”.

(7) You can remove a saved event template from the list any time by pressing the button “Remove Event Templates” at the bottom of the list.

6. Presentation on Enhancement of the HKUEMS held on Jan 14, 2013

The presentation file can be viewed at the following websites:

- Information Technology Services: http://www.its.hku.hk/documentation/guide/infosys/hkuems

Knowledge Exchange Office
April 2014