The Chinese University of Hong Kong Implementation of Human Resources Management System (HRMS)

Kickoff Meeting

Dec 19, 2014

Agenda

1. Project Objectives & Benefits

2. Project Scope

3. Project Approach

4. Governance Structure

5. Change Management

6. Project Schedule

7. Project Team

8. Critical Success Factors

9. Questions & Answers

CUHK Implementation of Human Resources Management System (HRMS)

Project Objectives

- To replace the current HR/Payroll system that cannot be upgraded to meet present level of service

- The new PeopleSoft HRMS is expected to achieve the following

  1. To capture more comprehensive employee data generated from data sources or workflows

  2. To allow access to certain HR functionalities by Department/individual users for automatic process handling, information sharing or analytics reporting

  3. To enhance work efficiency by automating and streamlining operational procedures

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Project Benefits

- Web-enabled HRMS system

- Availability of new/enhanced features e.g. e-Recruitment, e-Leave, ESS and MSS

- Branding Recognition to attract worldwide talents (e-Recruitment)

- D/U to access to staff data via decentralization of data ownership

- Consolidate many existing HRMS systems

- Align with go-green initiatives via self-service

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PEOPLESOFT ENTERPRISE

CUHK Implementation of Human Resources Management System (HRMS)

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CUHK Implementation of Human Resources Management System (HRMS)

Project Scope

Organization Scope

- In The Chinese University of Hong Kong that is located in Hong Kong only

Functional & Process Scope

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TALEO

- Workforce Admin
- Global Payroll
- Absence Management
- Base Benefits
- Compensation
- Performance
- Training

- Recruitment
- On-boarding

Customization Scope

Configuration Scope

Training Scope

- Product Familiarization Training
- Train-the-Trainer (3T) Training
- Support on End-User Training

Infrastructure Scope

- Provide hardware sizing recommendations
- Working with hardware vendors on hardware implementations
- PeopleSoft Infrastructure
- Performance Testing
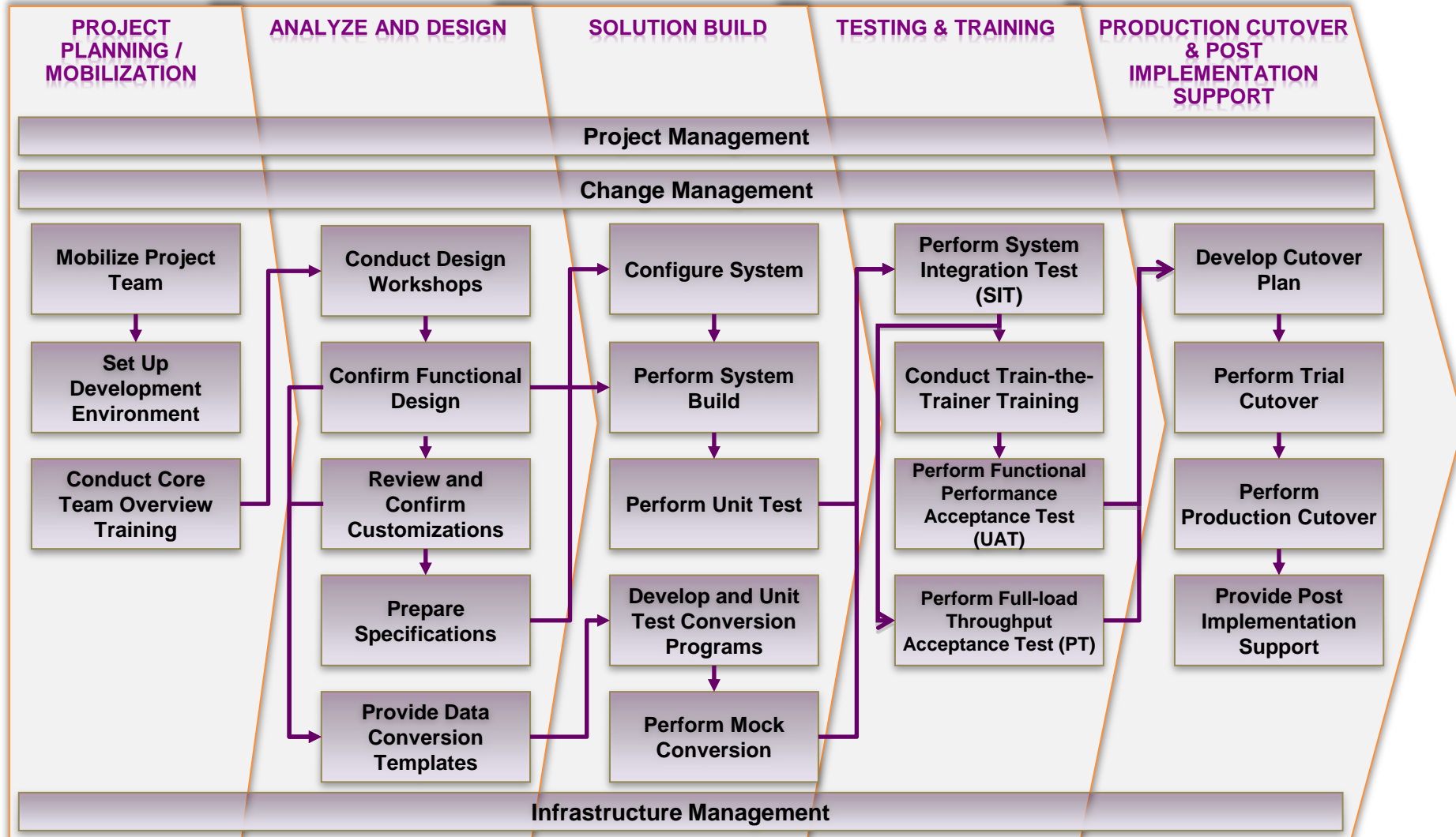- Database administration support

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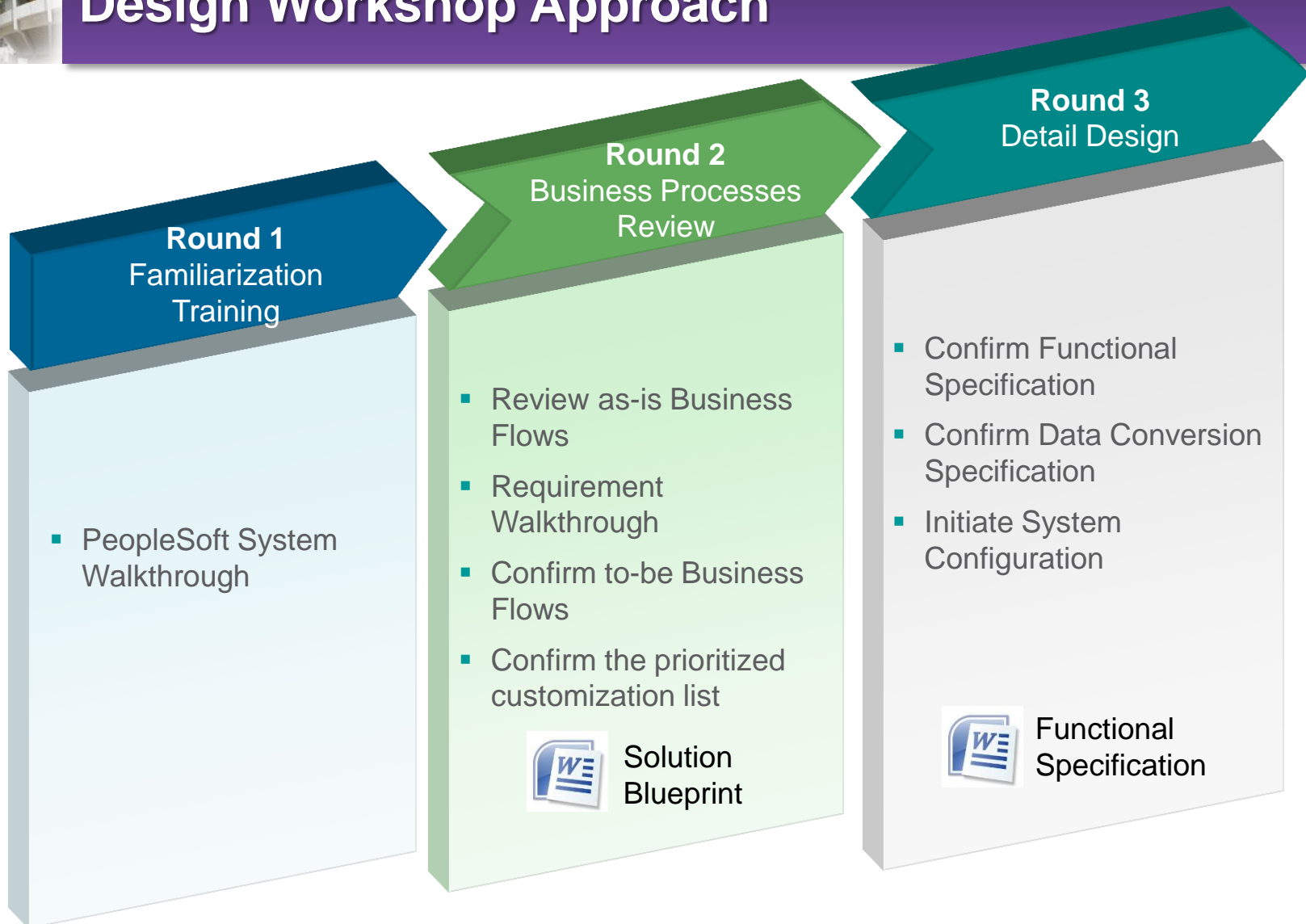
9. Questions & Answers

CUHK HRMS Implementation Plan

PROJECT PLANNING / MOBILIZATION	ANALYZE AND DESIGN	SOLUTION BUILD	TESTING & TRAINING	PRODUCTION CUTOVER & POST IMPLEMENTATION SUPPORT

Project Management

Change Management

Mobilize Project Team	Conduct Design Workshops	Configure System	Perform System Integration Test (SIT)	Develop Cutover Plan
Set Up Development Environment	Confirm Functional Design	Perform System Build	Conduct Train-the-Trainer Training	Perform Trial Cutover
Conduct Core Team Overview Training	Review and Confirm Customizations	Perform Unit Test	Perform Functional Performance Acceptance Test (UAT)	Perform Production Cutover
	Prepare Specifications	Develop and Unit Test Conversion Programs	Perform Full-load Throughput Acceptance Test (PT)	Provide Post Implementation Support
	Provide Data Conversion Templates	Perform Mock Conversion		

Infrastructure Management

Design Workshop Approach

Round 1
Familiarization
Training

Round 2
Business Processes
Review

Round 3
Detail Design

- PeopleSoft System Walkthrough

- Review as-is Business Flows

- Requirement Walkthrough

- Confirm to-be Business Flows

- Confirm the prioritized customization list

Solution Blueprint

- Confirm Functional Specification

- Confirm Data Conversion Specification

- Initiate System Configuration

Functional Specification

Items to be Verified and Confirmed During Functional Design Workshops

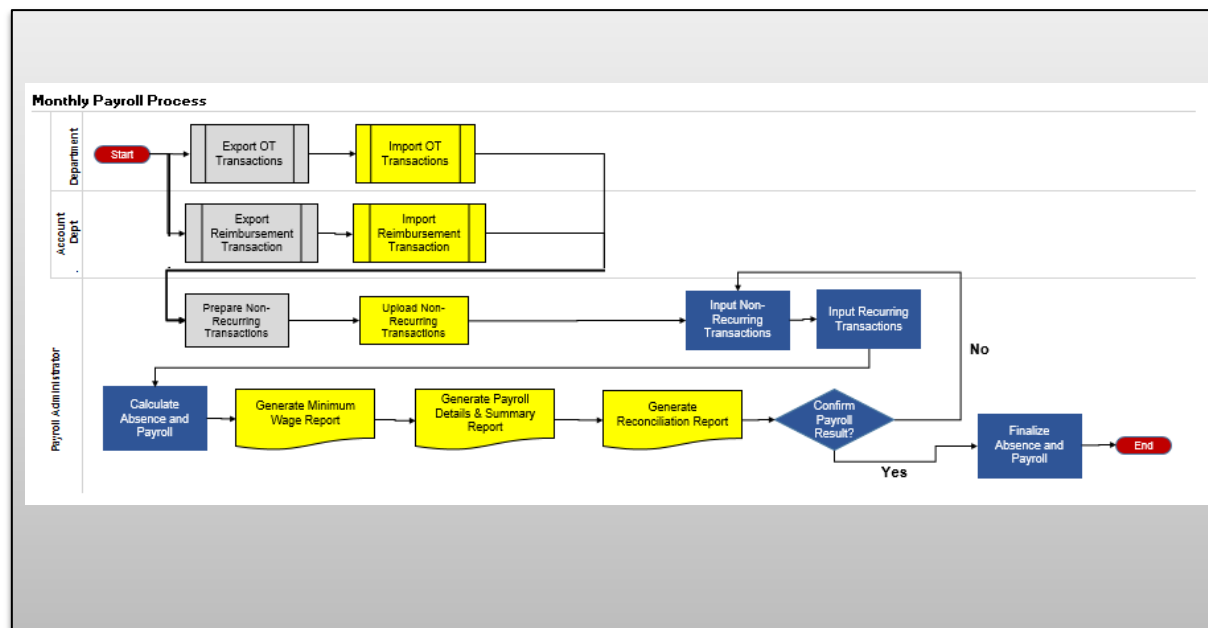| Process Flow / Step	System Design	Customization	Data Conversion	Access Control
■ **What** are the steps in a particular business process? ■ **Who** will participate in this process? ■ Which **external system** is involved in this process? ■ Which process step need **customization (Report / Interface / Program / Function)**?	■ How to do **core PeopleSoft design** so that it can satisfy CUHK specific requirements? ■ Any **special scenario** to be considered in solution design? ■ Need changes on **PeopleSoft downstream systems**?	■ What is the **detail logic** of this customization?	■ What is the Data Conversion **Scope**? ■ How to **transform** data from legacy systems to PeopleSoft?	■ What kind of people can use the particular system **function**? ■ Is there any restrictions for certain people to manage the particular **data**?

■ Any discussion items which require further investigation and verification will be documented in the **Discussion Log** for traceability and reference.

Microsoft Excel
Worksheet

Design Phase Deliverables

1

香港中文大學
The Chinese University of Hong Kong

IBM

Solution Blueprint

for CUHK HRMS Project Implementation

Monthly Payroll Process

| Manual | PeopleSoft | Customization |

CUHK Implementation of Human Resources Management System (HRMS)

Design Phase Deliverables

②

香港中文大學
The Chinese University of Hong Kong

IBM

Functional Specification

for CUHK HRMS Project Implementation

Mock up Screen

Staff Profile Report

Run Control ID 1   Report Manager   Process Monitor   [Run]
Language [English ▼]

Select Emplyee

Empl ID [KH90001] 🔍 Tai Man Chan

Display Option

☐ Personal Details	☐ Job Data – (Primary Job)
☐ Emergency Contact	☐ Dependent Information
☐ School Education	☐ Professional Qualification
☐ Benefits	☐ Prior Work Experience
☐ Employment History	

Report Layout

Staff Profile Report

Printed By: PETERC
Printed Date: 01/01/2014   Confidential

Staff Information

Staff No.	3000001	AC Name	陳大文
Name	Chan, Tai Man	English Name	Henry

Personal Details

Date of Birth	01/01/1975	Age		Photo
Gender	Male	Marital Status	Single	
Phone (Home)	1111 1111	Mobile (Business)	1234 1234	
Mobile (Personal)	1234 1234	Email (Personal)	abc@hotmail.com	
NID Country	Hong Kong	National ID	A123456(1)	
	Singapore		123456789	
Citizenship	Hong Kong	Passport No.	1234567890	
	Singapore		1234567890	
Address	Home	Address 1 Address 2 Address 3 Area Code District Country		

Job Data – (Primary Job)

Business/Service Group	Commercial Property		
Dept/Building	Building Operation		
	BO-Exchange Square Ground		
Job Band	Admin 3	China Job Band	C15
Job Position	Senior Accountant	Working Location	Hong Kong
Regular / Temp	Regular	Secondee	
Full / Part	Full	Probation End Date	31/03/2010
Date Joined	01/01/2010	Company Seniority Date	01/01/2010

Train-The-Trainer (3T) Trainings

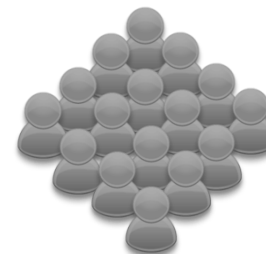## Power User Training > CUHK End User Training

IBM → CUHK Admin Staff → CUHK End-Users

Train-The-Trainer Approach (3-T)

IBM Testing Approach

1

Development Unit Test

- As customization item remediation is conducted, each customization item will be unit tested during the Solution Build period.

2

Mock Conversion

- There will be rounds of PeopleSoft HRMS mock conversion to ensure implementation procedure is correctly performed.

3

SIT and UAT

- Integration Testing of the PeopleSoft HRMS functions with the CUHK's dependent systems.
- User Acceptance Testing is to be conducted by users.

4

Performance Test

- The Performance Test will focus on verifying the performance and response in particular for critical functions in the PeopleSoft HRMS.

5

Trial Cutover

- Trial Cutover is to rehearse the defined Production Cutover Plan and finally replace legacy system with new system in production environment.

CUHK Implementation of Human Resources Management System (HRMS)

User Acceptance Test (UAT)

Users Involvement

- **System-Users** are expected to conduct intensive testing on the new HRMS system before system go-live

Test Script

System Defect Finding

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Project Organisation and Governance Structure

CUHK HRMS Steering Committee

CUHK HRMS Change Mgmt Group

CUHK HRMS Project Mgmt Group

CUHK HRMS Advisory Sub-Committee

Distributed HR Management Workgroup

CUHK HRMS Project Delivery Group

HRMS Mega Task Force

CUHK Key Users

Faculty Secretaries

IBM Consultants

CUHK ITSC Functional / Technical Team

IBM Functional Team

Functional User Workstream

CUHK Key Users

System Facilitators

CUHK ITSC Support Team

IBM Technical Team

IBM Consultants

CUHK Implementation of Human Resources Management System (HRMS)
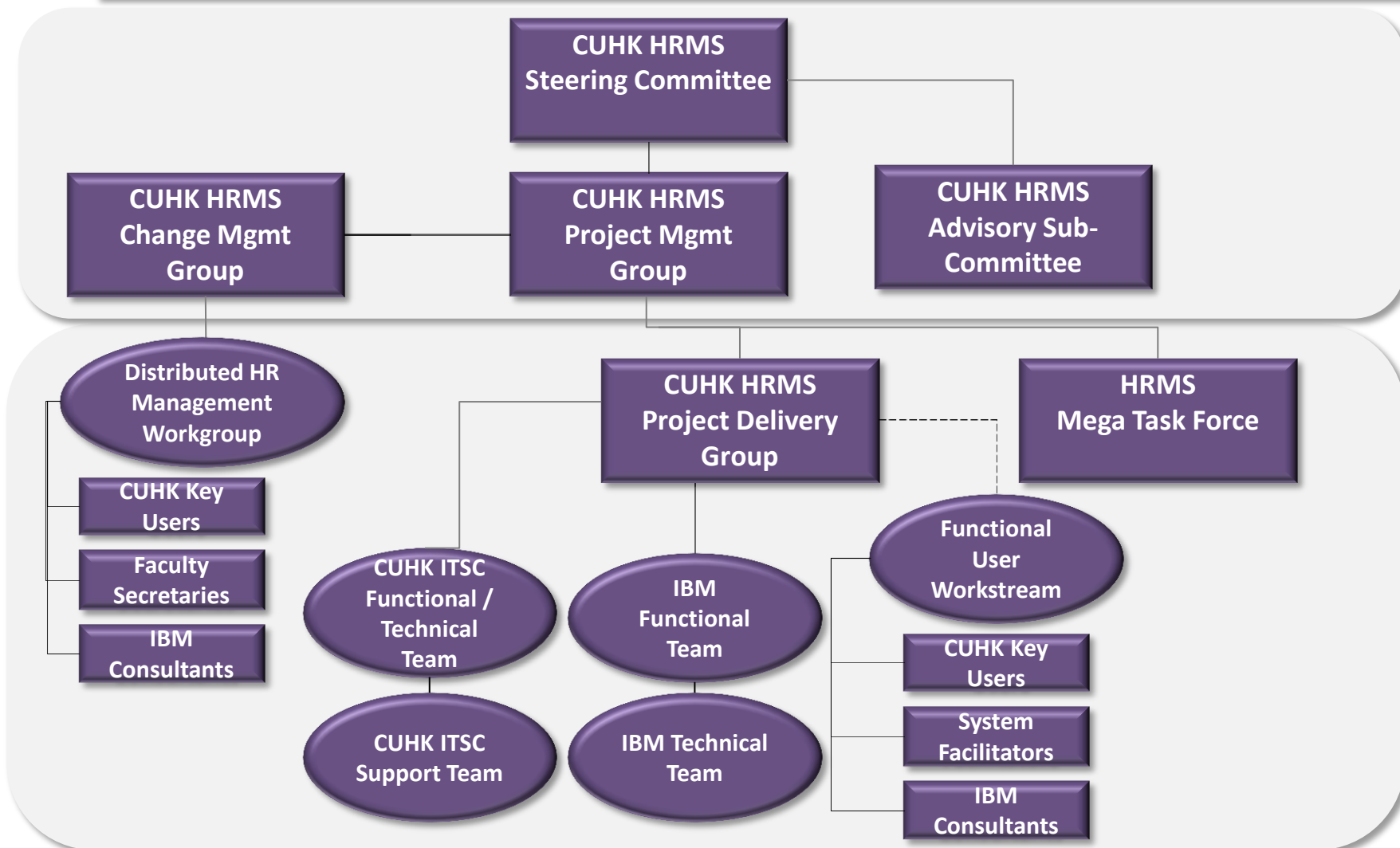
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Objective of Change Management for CUHK HRMS Implementation Project

- The objective of Change Management is to align staff and culture with changes due to the new HRMS system. Therefore a structured Change Management program is essential

Implementation of CUHK HRMS

New ways of working in Human Resources
*Potential barriers to recognizing the benefits,
accepting the new changes and committing towards the new system*

▼

Change Management Strategy & Plan
Planning and executing deliberate actions to help stakeholders prepare for the upcoming changes

▼

Manage expectation

Gain and maintain support throughout the life of project

Prepare users and non-user stakeholders to operate effectively in the new environment

Stakeholders impacted by the new CUHK HRMS

Personnel Office

Bursary

ITSC

Teaching Staff

Non-Teaching Staff

Research Staff

Steering Committee of HRMS

Project Management Group

Project Delivery Group

Part-time Staff

9 Colleges

8 Faculties

CUHK Implementation of Human Resources Management System (HRMS)
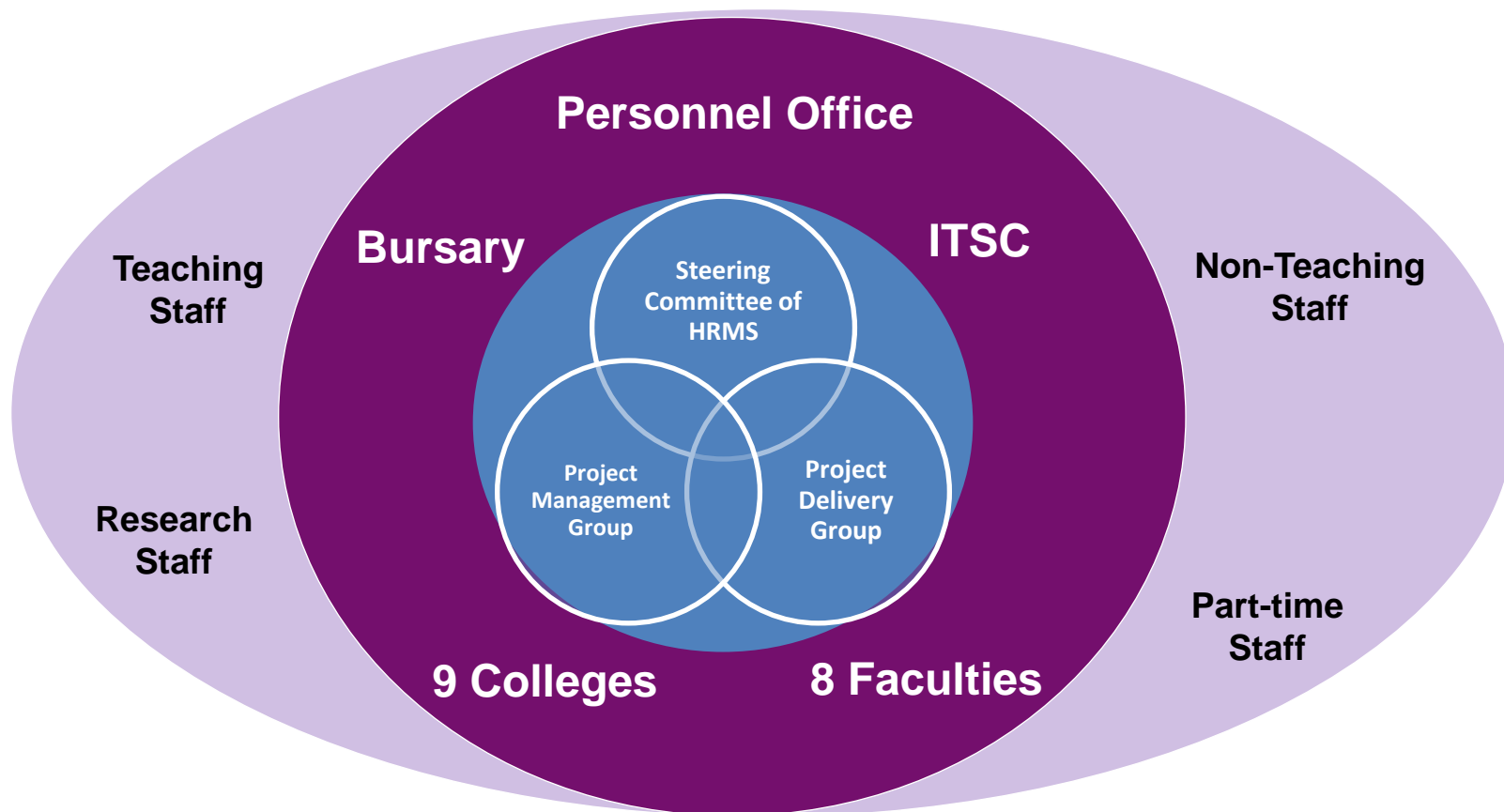
Proposed Change Management Strategy and Plan

```
                    CUHK HRMS
                      Change
                  Management Plan
```

CUHK HRMS Change Management Plan

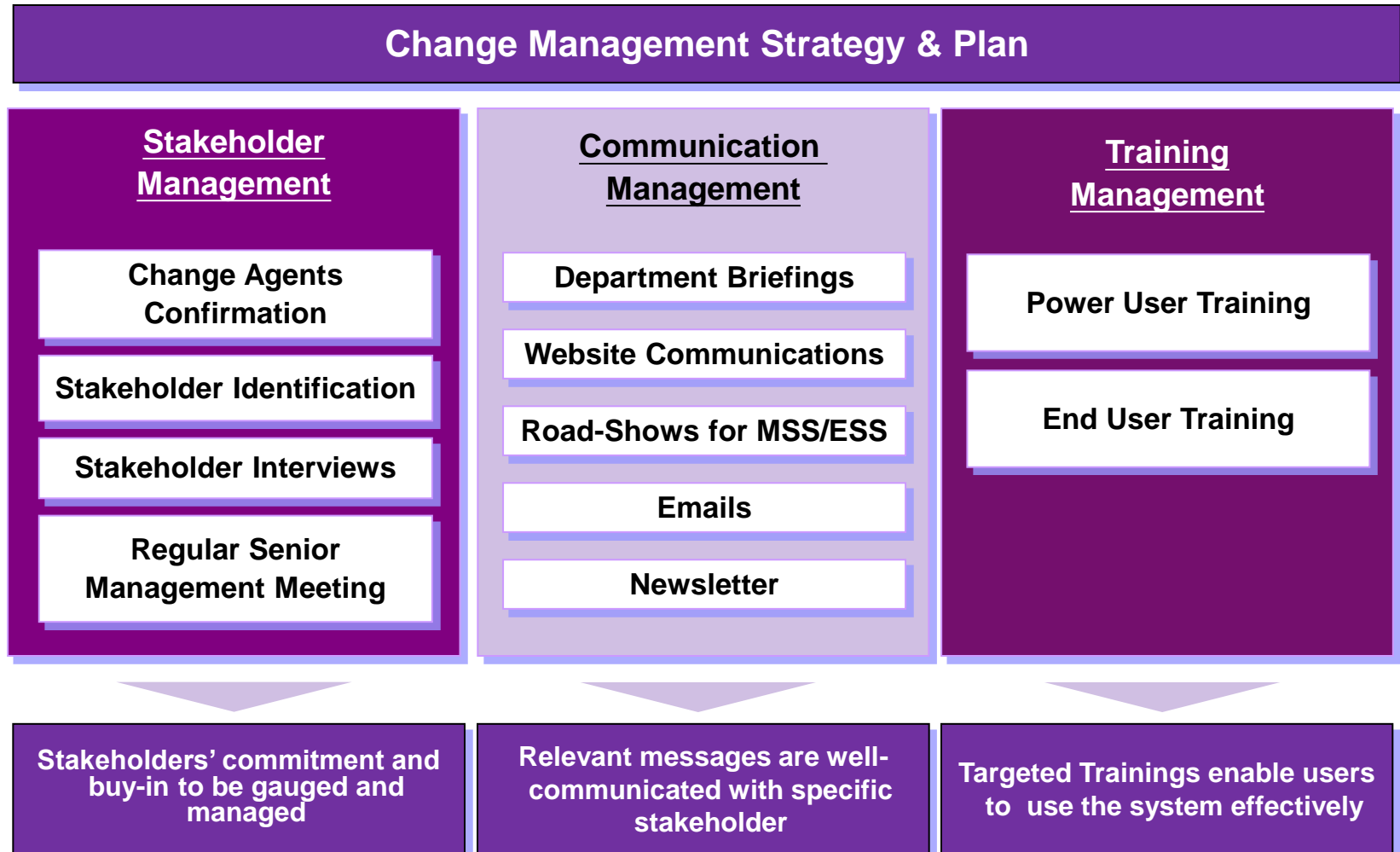| Stakeholder Engagement	Communication Management	Training Management
Change Agents Confirmation	Communication Plan Development	Training Needs Identification
Stakeholder Identification	Communications Delivery	Training Plan Development
Stakeholder Assessment	Regular Communication Meeting	Training Materials Development
Regular Senior Management Meeting		Training Delivery

CUHK Implementation of Human Resources Management System (HRMS)

Change Management Work Components

- Below are the Change Management Elements and Work Components

Change Management Strategy & Plan

Stakeholder Management

- Change Agents Confirmation
- Stakeholder Identification
- Stakeholder Interviews
- Regular Senior Management Meeting

Communication Management

- Department Briefings
- Website Communications
- Road-Shows for MSS/ESS
- Emails
- Newsletter

Training Management

- Power User Training
- End User Training

Stakeholders' commitment and buy-in to be gauged and managed

Relevant messages are well-communicated with specific stakeholder

Targeted Trainings enable users to use the system effectively

Key Components and Expected Outcome

	Stakeholder Engagement	Communication Management	Training Management
Objective	▪ Stakeholders' commitment and buy-in to be gauged and managed	▪ Communications are in line with project delivery activities and overall schedule ▪ Communications are targeted to specific stakeholder with relevant messaging	▪ Targeted training is delivered at right time for key users ▪ Flexible learning for disparate users ▪ Enable users to effectively adopt the system
Key components	▪ Change Agents Confirmation ▪ Stakeholder Identification ▪ Stakeholder Assessment ▪ Senior Management Meeting	▪ Communication Plan Development ▪ Communications Delivery ▪ Regular Communication Meetings	▪ Training Needs Identification ▪ Training Plan Development ▪ Training Materials Development ▪ Training Delivery
Outcome	▪ **Manage and achieve the optimum involvement** of key stakeholders ▪ **Manage core stakeholder attitude, commitment and buy-in** to the planned change	▪ **Build awareness** in CUHK of the implementation of HRMS, its objectives and benefits ▪ **Minimize uncertainty** and hence minimize staff anxiety and disruption to day-to-day business	▪ **Enable** CUHK impacted users to **make smooth transitions** to new HRMS ▪ **Provide** users adequate **'on the ground' support** to smoothen the system transition

Change Management Work Plan (Tentative)

- Below is the Change Management Actual Work Plan (Assume Project starts in Sept 2014)

Category	Task	Responsible Party	Completion Timeframe
Pre-Contract Period	Briefing to PO, Bursary and Department Admin on the overall project overview	CUHK / IBM	Aug 2014
Overall Change Management	Confirm Change Management Schedule	CUHK / IBM	Sep-Oct 2014
	Develop Change Management Strategy	IBM	Sep-Oct 2014
	Monitor and Manage Change Management issues	CUHK / IBM	Ongoing
Stakeholder Management	Identify Stakeholders	CUHK / IBM	Oct 2014
	Confirm Change Agent	CUHK	Nov 2014
	Identify and Execute Response Actions	CUHK / IBM	Ongoing
	Stakeholder Discussions	CUHK / IBM	Oct 2014 – Apr 2015
	Phase 1 : Stakeholder Meetings	CUHK / IBM	Oct 2014
	Phase 2: Stakeholder Meetings	CUHK / IBM	Jan 2015
Communication Management	Develop Communication Strategy and Communication Plan	IBM	Nov–Dec 2014
	Phase 1: Townhall, Website Communications and Roadshows	CUHK / IBM	Jul 2015 - Nov 2015
	Phase 2: Townhall, Website Communications and Roadshows	CUHK / IBM	Aug 2014 - Mar 2015
Training Management	Develop Training Strategy and Training Plan	IBM	Jan - Apr 2016
	Phase 1: Power User Training and End User Training	CUHK / IBM	Jul 2015 - Nov 2015
	Phase 2: Power User Training and End User Training	CUHK / IBM	Aug 2014 - Mar 2015

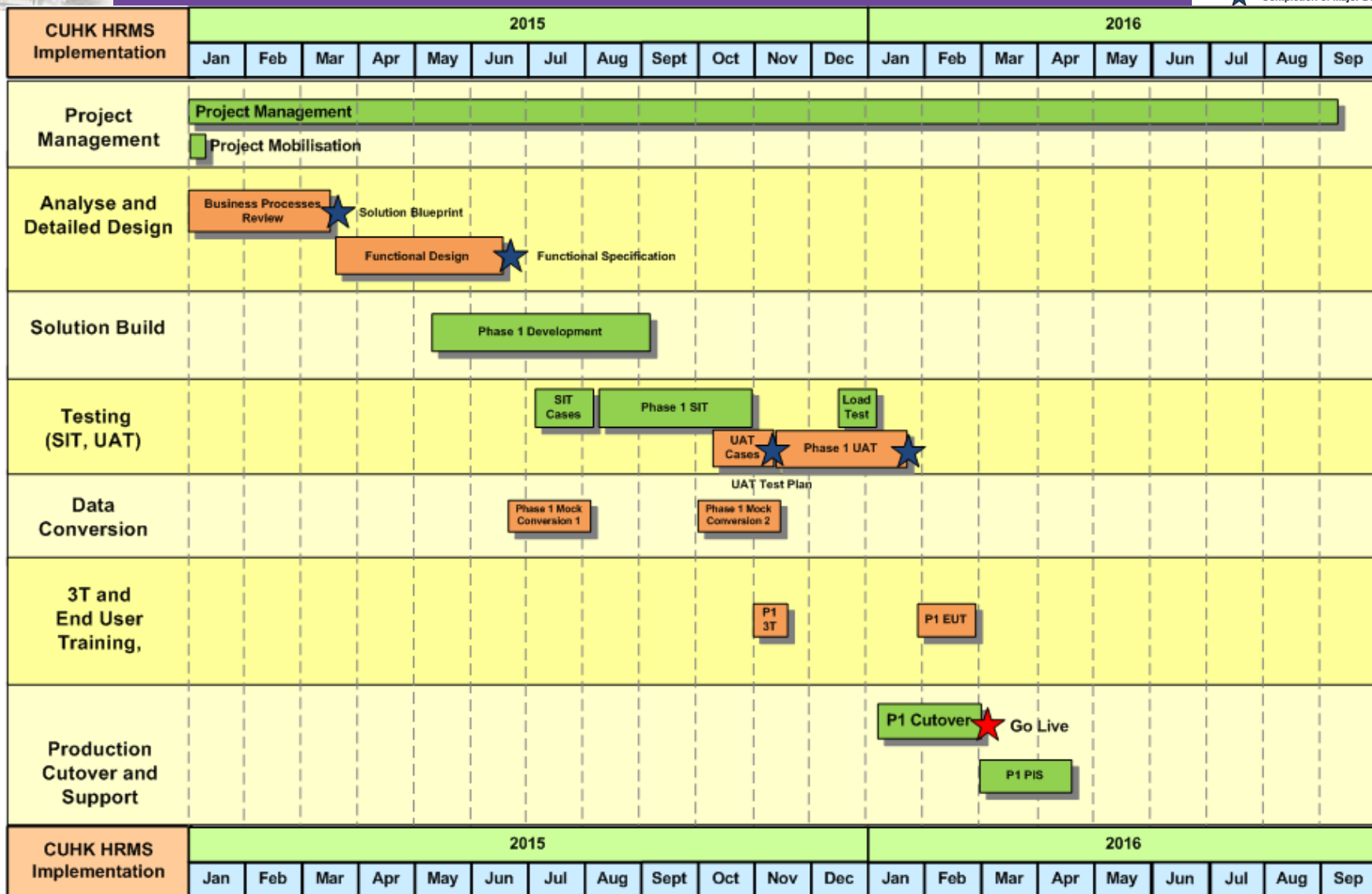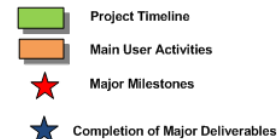CUHK Implementation of Human Resources Management System (HRMS)

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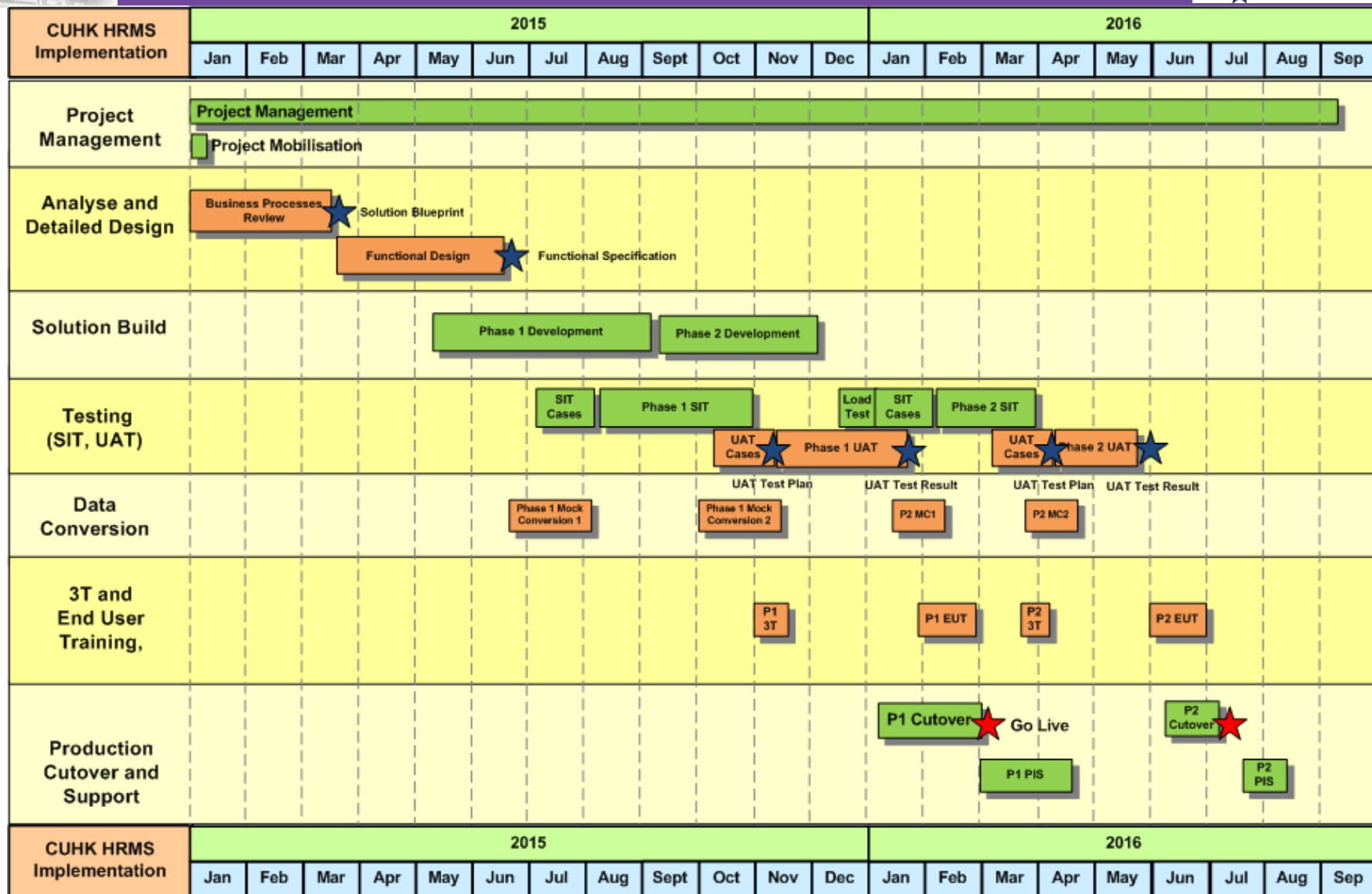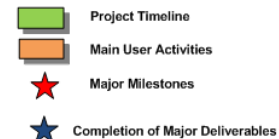
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High level Project Schedule (Phase 1 only)

Remark:
- SIT = System Integration Test
- UAT = User Acceptance Test
- 3T = Train-the-Trainer Training
- EUT = End User Training
- PIS = Post Implementation Support

High level Project Schedule

- Project Timeline
- Main User Activities
- Major Milestones
- Completion of Major Deliverables

CUHK HRMS Implementation	2015												2016								
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep

Project Management
- Project Management
- Project Mobilisation

Analyse and Detailed Design
- Business Processes Review → Solution Blueprint
- Functional Design → Functional Specification

Solution Build
- Phase 1 Development
- Phase 2 Development

Testing (SIT, UAT)
- SIT Cases
- Phase 1 SIT
- Load Test
- SIT Cases
- Phase 2 SIT
- UAT Cases → Phase 1 UAT
- UAT Cases → Phase 2 UAT

Data Conversion
- Phase 1 Mock Conversion 1
- Phase 1 Mock Conversion 2
- UAT Test Plan
- UAT Test Result
- P2 MC1
- UAT Test Plan
- UAT Test Result
- P2 MC2

3T and End User Training
- P1 3T
- P1 EUT
- P2 3T
- P2 EUT

Production Cutover and Support
- P1 Cutover → Go Live
- P2 Cutover
- P1 PIS
- P2 PIS

CUHK HRMS Implementation	2015												2016								
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep

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High level Design Phase Plan

Ref	Key Project Activities	# Wks	2015 Jan 2015-01-05 (5)	2015-01-12 (6)	2015-01-19 (7)	2015-01-26 (8)	Feb 2015-02-02 (9)	2015-02-09 (10)	2015-02-16 (11)	2015-02-23 (12)	Mar 2015-03-02 (13)	2015-03-09 (14)	2015-03-16 (15)	2015-03-23 (16)	2015-03-30 (17)	Apr 2015-04-06 (18)	2015-04-13 (19)	2015-04-20 (20)	2015-04-27 (21)	May 2015-05-04 (22)	2015-05-11 (23)	2015-05-18 (24)	2015-05-25 (25)	Jun 2015-06-01 (26)	2015-06-08 (27)	2015-06-15 (28)	2015-06-22 (29)	2015-06-29 (30)
	CUHK PeopleSoft HCM Implementation Project																											
2	**Analyse and Detailed Design**																											
2.1	Round 1 - Familiarization Training (0.5 day per module)	1	■																									
2.2	Round 2a - Business Processes Review (2 days per module)	5		■	■	■	■	■																				
2.3	Round 2b - Solution Blueprint Walkthrough (2 day per module)	4							■	■	■	★																
2.4	Round 3a - Detail Design (inc Data Conversion) (3 days per module)	7											■	■	■	■	■	■	■									
2.5	Round 3b - Functional and Data Conversion Spec Walkthrough (3days per module)	7																		■	■	■	■	■	■	★		

Acceptance of Solution Blueprint

Acceptance of Functional Design

Detail Design Workshop Schedule

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	04 Jan	**05 Jan**	**06 Jan**	**07 Jan**	**08 Jan**	**09 Jan**	**10 Jan**
AM 9:00 - 11:00		Workforce Administration	Security	Base Benefit	Data Conversion	Recruitment	
11:00 - 12:30			Training				
PM 14:00 - 18:30			Absence Management	Performance Review	Global Payroll		
	11 Jan	**12 Jan**	**13 Jan**	**14 Jan**	**15 Jan**	**16 Jan**	**17 Jan**
AM 9:00 - 12:30		Workforce Administration	Security	Global Payroll	Absence Management	Base Benefit	
PM 14:00 - 18:30			Performance Review				
	18 Jan	**19 Jan**	**20 Jan**	**21 Jan**	**22 Jan**	**23 Jan**	**24 Jan**
AM 9:00 - 12:30		Training		Staff Cost Planning	Workforce Administration	Security	
PM 14:00 - 18:30		Recruitment				Performance Review	
	25 Jan	**26 Jan**	**27 Jan**	**28 Jan**	**29 Jan**	**30 Jan**	**31 Jan**
AM 9:00 - 12:30		Global Payroll	Absence Management	Base Benefit	Training	Staff Cost Planning	
PM 14:00 - 18:30					Recruitment		
	01 Feb	**02 Feb**	**03 Feb**	**04 Feb**	**05 Feb**	**06 Feb**	**07 Feb**
AM 9:00 - 12:30			Workforce Administration	Security	Global Payroll	Absence Management	
PM 14:00 - 18:30				Performance Review			
	08 Feb	**09 Feb**	**10 Feb**	**11 Feb**	**12 Feb**	**13 Feb**	**14 Feb**
AM 9:00 - 12:30		Base Benefit	Training	Staff Cost Planning		Workforce Administration	
PM 14:00 - 18:30			Recruitment		Security		

Corporation

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Key Challenges and Success Factors

Change Request

- Legal requirement change

- CUHK business processes change

- Scope Change

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Question & Answers

Next Step – Team Building !!!!