Human Capital Management Workshop Summary
Contents:

Summarized content from the following workshops:

- HCM Overview (concepts)
- Non-Person Profile
- CU Careers
We Heard You
Why Change?

Current Struggles
• Legacy maintenance
• Falling behind
• Unable to attract employees
• Changes pushed through
• Errors in data

Opportunities
• As delivered enables updates
• Transaction pages improve quality
• Approvals ensure accuracy
• More agile environment
HRMS and HCM

Today

• Department Users or HR Staff enter data
• Tables reflect changes immediately

Tomorrow

• Employees or Managers can initiate data transactions
• Department Users and HR review and approve changes
• Tables reflect only approved changes
• HR helps get the data right
Example of Change

Currently:
• Requests are email, paper-based, verbal
• Justification not included

Future:
• Managers initiate change
• HR reviews/approves
• Streamlined; more complete
Employees Access

Employees → Portal → Home page → Conduct transaction → HCM
Managers and HCM User Access

Managers and Other HCM Users -> Portal -> WorkCenter

WorkCenter: Main, Reports/Processes

My Work -> Transaction page

HCM
New Concepts: Transaction Pages and Approval Workflows

Transaction pages

- Multiple changes on single transaction page.
- Submitted changes are routed for approval.
- Tables are updated after approval.

Approval Workflows

- Review, reject, or approve requests.
- Eliminates paper and email-based approvals.
Example of Transaction Page—Position Change

Create ePAR Position Request

Step 3 of 4: ePAR Position - Change

Transaction Details

- PAR Action: Position
- Request ID: NEXT
- ePAR Status: Initial
- Action: Position Change
- Reason Code: Department Change
- Effective Date: 06/15/2015
- Effective Seq: 0
- Document ID: ePAR Position
- Document Instance: 0
- Document Status: Initial / Add Entry

Position Details

- Job Information

See Current Value

<table>
<thead>
<tr>
<th>Field</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>51000 Employee Services</td>
<td>52000 Employee Services</td>
</tr>
<tr>
<td>Company</td>
<td>CU University of Colorado</td>
<td>CU University of Colorado</td>
</tr>
<tr>
<td>Location</td>
<td>5UCA Office of the President</td>
<td>5UCA Office of the President</td>
</tr>
<tr>
<td>Reports To</td>
<td>00706444 Business Services Senior Prof</td>
<td></td>
</tr>
<tr>
<td>Appointing Authority</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Open fields where users can change data
Example of Workflow Progression
New Concepts: WorkCenters

- Personalized work items.
- Links to applications and web pages.
- Access to role based queries.
What Types of Changes Can be Submitted to HCM?

Employees

Managers and Other HCM Users
Employees (self)

- Time Worked
- Leave Used
- Direct Deposit
- W-4
- Benefit Elections

Manager Approval

Demographic data:
- Address
- Phone
- Email

Payroll

Benefits

Personal Data

Paycheck
W2
Job/Salary

HCM
Employees (self)

Person Profile:
• Education
• Competencies
• Training Completions

Evaluation data:

NEW!
New Concepts: Person Profiles and ePerformance

Person Profile

- A person's skills, competencies, education.
- Employees can update their own person profile.

• Streamlines performance appraisals.
• Collaborate on performance goals.
• Review performance history.
• Monitor the process and timelines.

ePerformance

Employee Services
Managers and HCM Dept. Users

Update Employee Data
Update Job Data
Update Position Data
Update Funding

Higher Level Approver HR Office Approval

HCM

Personal Data
Job Data
Position Data
Funding
Managers and HCM Dept. Users

NEW!
Update Performance Data

Update Non-Person Profile Data
- Job Description
- Competencies
- Required Training

Update Time
- Corrections
- One-Time Pays

Higher Level Approver HR Office Approval

HCM
- ePerformance
- Non-Person Profile
- Payroll

Update Non-Person Profile Data
- Job Description
- Competencies
- Required Training

Update Time
- Corrections
- One-Time Pays

8/14/2015 Employee Services
New Concept: Non-Person Profile

Job Description

Non-Person Profile
(aka: Position description)

Position ID:

Summary:
Skills:

Competencies:
Responsibilities:
What are Non-Person Profiles?

Current Job Description

In HCM – Non-Person Profile

- Title
- Duties
- Competencies
- Qualifications
- Requirements
Position Profile: Where Data Came From

- HRMS
  Position Data
  Training Data

- KeneXa
  (competency data)

- CU Careers

- PeopleAdmin
  (Jobs@CU)
Position Data

HRMS Today
- Job Code
- Supervisor (Reports to)
- Salary plan/grade
- Department
- FLSA Status
- HIPPA
- Hazardous materials
- Officer code

HCM Tomorrow
- Job Code
- Supervisor (Reports to)
- Salary plan/grade
- Department
- FLSA Status
- HIPPA
- Hazardous materials
- Officer code

Still part of Position

Now part of Non-Person Profile
Creating Positions Today

Jobs@CU PeopleAdmin

Create/Modify position

Recruit and approve selection

Approve

Only Position data is updated

Hire, Approve (data entered manually)

HRMS
Creating Positions in the Future

**HCM**

**Transaction Page**
- Create/modify position
- Define funding
- Create Non-Person Profile

**Approve**

**Non-Person Profile**

**CU Careers**
HCM data populates requisition in CU Careers

**Personal Data to HCM**

**Approve**
- Complete Hire

**Recruit / Hire**
Non-Person Profile Interactions

HCM

CU Careers

Personal Data

Person Profile

ePerformance

Non-Person Profile
(Job Description)
Person Profile vs. Non-Person Profiles

**Person Profile**
- Personal Data:
  - Name
  - Address
  - Contact Info
- Duties: Proficiency
- Competencies: Proficiency
- Education
- Certifications

**Non-Person Profile**
- Position Data:
  - ID
  - Reports to
  - Funding
- Duties
- Qualifications
- Competencies Needed
- Required Training
- Education
- Certifications
Employee Professional Development

What Employee Possesses:

Person Profile

- **Skills**
  - MS Access
  - MS Office

- **Competencies**
  - Analytical
  - Problem Solving

- **Completed Training**

- **Education**
  - BA in Business

- **Certifications**
  - None-CPA candidate

What Job Requires:

Non-Person Profile

- **Skills**
  - Quickbooks
  - MS Office

- **Competencies**
  - Analytical
  - Problem Solving

- **Required Training**

- **Education**
  - 4 Year Degree

- **Certifications**
  - CPA license

Next Job: Sr. Accountant

Current Job: Accountant
Job Families and Job Codes

University Staff

Finance and Accounting

Jobcode1
Jobcode2
Jobcode3

Jobcode4
Jobcode5
Jobcode6

Academic Services
## Sample of a Non-Person Profile

### Duty Statement for Univ Staff

<table>
<thead>
<tr>
<th>ID</th>
<th>Duties</th>
<th>Percent of Time</th>
<th>Sample of Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>FA_ACCT001</td>
<td>Prepares Balance Sheets, Profit and Loss Stmt, and other report</td>
<td>30</td>
<td>Audits records of transactions affecting department accounts to ensure accurate assignment of debit and credits. Inspects monthly statement of accounts for cohesion with budget plans, purchase agreements, service contracts etc.</td>
</tr>
<tr>
<td>FA_ACCT002</td>
<td>Analyze Trends, costs, financial commitments and obligations</td>
<td>20</td>
<td>Collaborates with Facilities Management to ensure project accounts are created and funded to support ongoing construction and maintenance work</td>
</tr>
<tr>
<td>FA_ACCT003</td>
<td>Predict Future Revenue and Expenses, adjust Accounts as Needed</td>
<td>40</td>
<td>Drafts annual budget and includes pertinent supplementary documents to the base revenue/expenditures consistent with budget plans to be submitted to the Vice Chancellor for Administration after approval</td>
</tr>
<tr>
<td>FA_ACCT004</td>
<td>Review and Analyze Financial Reports</td>
<td>10</td>
<td>Develops monthly budget reports for internal review using interpretation of historical and current financial data for dissemination by line (speedtype). Delivers approved reports to department supervisors</td>
</tr>
</tbody>
</table>
Transactions that Impact Pay

- Time worked
- Leave usage
- Benefit elections
- W4
- Direct Deposit
- Funding data
- Job (salary) FICA
- One time payments
- One time deductions
- Journal entry (FIN)
- Paychecks/Advices
Interacting with HCM

- Finance
- Users
- Central Information Warehouse (CIW)
- Campus Solutions
- CU Careers
- SkillSoft
- 3rd party
Making Hiring Agile

HCM integrates with CU Careers

- HCM sends position data to CU Careers
- CU Careers sends hire data back to HCM
Define Position
• Position
• Non-person profile
• Funding data

Approved?
Yes

Recruit

Position data received

Edit req
Post req
Review
Select
Background check
Offer

Yes

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Rejected; returns to initiator

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes

Approved?

No

Create employee ID

Complete Hire/approval

Onboard

• Position
• Non-person profile
• Funding data

Approved?

Yes

No

Update Status to Hired; Personal data sent to HCM

Yes
A little about CU Careers

• Oracle product, compatible with HCM which is also an Oracle system.
• Near real time feed between HCM and CU Careers.
• Two Sites: Internal recruiting site and external site for applying.
10. HCM integrations move information more seamlessly.

- HCM sends data from the Non-Person Profile to CU Careers, which can be used to create a requisition.
- Eliminates the need for the personal data worksheet.
- Upon selecting a candidate, CU Careers sends personal information such as name, address, SSN to HCM upon which HR can complete the hire process.
Top 10 CU Careers Features

9. A welcome dashboard efficiently organizes the current state of recruiting activities.

View and link to:

- All candidates
- Requisitions
- Outstanding offers
- Outstanding action items and self-assigned tasks.
Top 10 CU Careers Features

8. The attachment preview function allows you to quickly view candidate attachments.
7. Campus-specific templates can be used for communication to the candidate.
Top 10 CU Careers Features

6. Interview invitations can be sent and added to Outlook calendars.
Top 10 CU Careers Features

5. Integration with HireRight, lets you initiate and track background checks.
4. E-Offer allow candidates to electronically sign offer letters.
3. The CU Careers site provides candidates an intuitive experience.

- Candidates can modify their submitted documents while the job is posted.
- Application flow shows candidates their submissions progress.
Top 10 CU Careers Features

2. The Candidate Selection Workflow (CSW) is simplified.

Recruit:

Direct Hire:
Top 10 CU Careers Features

1. Reports put recruiting data at your fingertips.

**Report Types:**
- Attachments Report
- Internal Candidates
- Candidates Hired
- Candidate and Requisition Details
- Time to Fill
- And more...
Requisition Details

- Ability to designate search committee
- Specify required documents
- Ensure posting language is correct
- Add or remove pre-screening questions
CSW Steps: Recruit

New
- To be reviewed
- Meets Minimum Qualifications
- Not Selected

Under Review
- Under Review
- Letters of recommendation
- Selected for interview

Interviews
- 2nd Interview
- HireVue
- Finalist
- Recommended for hire
CSW Steps: Offer

Offer Checks
Initiate background checks

Offer
Offer to be Made
Offer Approval

Hire
Date of Birth and Social Security Number collection
Hired
Confidential Letters of Recommendation

1. New
   - To be reviewed
   - Meets Minimum Qualifications
   - Not Selected

2. Under Review
   - Under Review
   - Letters of recommendation
   - Selected for interview

3. Interviews
   - 2nd Interview
   - HireVue
   - Finalist
   - Recommended for hire
Thank You

• Email questions to: hcm_community@cu.edu
• Subscribe to our blog at: https://www.cu.edu/blog/hcm-community