University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Agenda

Meeting Date & Time:	July 10, 2014 – 10:00am – 12:00pm
Meeting Location:	1800 Grant, Room 607
Meeting Facilitator	Lisa Affleck

Discussion Topics	
Agenda Items	**Presenter**
Topic 1: Non-Person Profiles	Cindy/Lezlie
Sub-Topic: Benefits of using Profiles in 9.2 and Profile Demo	Cindy/Lezlie
Sub-Topic: Vacant and Inactive Position Data in PeopleSoft and People Admin	Cindy/Lezlie
Sub-Topic: Required Training needed for individual Non-Person Profiles	Cindy/Lezlie
Sub-Topic: How many Non-Profile types are needed?	Cindy/Lezlie
Topic 2: PeopleAdmin – What fields are necessary?	Cindy/Lezlie

Action Items (carried until completed)

	Action	Assigned To	Due Date	Status
1				
2				
3				

Notes:

These are combined notes from the Boulder Advisory Meeting held on July 8th meeting and the combined HR Advisory Meeting held on July 10th.

The July 10th meeting began with an overview on Profiles, both Person and Non-Person, and discussion of common terms. This was based on feedback from the Boulder group and this was not discussed as part of that meeting.

Overview and common terms

- Focus on profiles, new functionality (person and nonperson)
- Nonperson
    - Tied to position data
    - Can create templates
    - UCD-why can't it be called it position profile or job profile; answer – it's an Oracle term. However, ES will consider using this as a 'Working Name' but users will still see Non-Person Profiles when working in the system.

Future state

- Question: Info in HCM will be put into Taleo? Can faculty positions bypass HCM and go straight into Taleo? Answer: ES will investigate and work with campuses – at this point we do not know.

- UCD: everything is competency based that is being driven by Kenexa; all people and non-person profiles can have core competencies. What is missing is a matrix that shows these systems interface; how does Kenexa relate to HCM, relate to SkillSoft, etc.; need to document the flow

- Answer: ES are working on this and meeting with Janet Lowe

Nonperson profile

- Job descriptions can either be saved to non-person profiles, positions or job codes – TBD, however the data will accessible all together
- When a position is created/updated, the system will automatically create a profile
- Question: Can additional competencies be added beyond the core?
  - Answer: Believe this to be true, but will verify.
- Question: Right now university staff/classified are together and we can review both; will we be able to do that if we split them? Also, at times there may be a research faculty who should also University staff.
- Faculty effort can be used in ePerformance, if campuses decide to use it

Discussed ideas for approval process flow for non-person/person profiles:

Allow multiple approvers
Create profile then approve?
Create position and approve?
Or create, profile, position and then approve (combine into one approval)?
Can the flow be different based on employment groups?
Where does Budget fit in to the approval process?
What does Budget need in order to approve?

Asked users about what is the best way to get workflow to work for you to get your job done? ***Tell your campus HR project members***.

<u>Question</u>: Do profiles have to be used for faculty? Can requirements such as degrees be set up at the job families?

- Answer: At this point, if a profile is required, the content will be very minimal. This will be reviewed as and the decision will need to be made how it will be used. We will review job families to set up high level requirements.

Can employee training scores be brought over from training? Can triggers be added to the position training in for the position? Need to talk to Janet Lowe
Boulder campus faculty – have Academic year and Summer positions, can there be multiple profiles for these faculty?

- Answer: Yes

When building these profiles would it is possible to have a standard/specific profile for faculty so you don't have to build each one? You can "clone" other types of jobs and then add on specific information to that position.

How do we address "other employment groups" Graduate Assistants/Prof Temps – can we avoid profiles for them? What does that process look like? Is there an option not to use profiles for certain job families?

- Answer: ES will investigate.

How often would HCM feed to Taleo?

- Answer: ES will investigate and work with campuses.

Training

- Some conversation in HR directors meeting, maybe they could be set up as yes/no questions
- Question: Could we use the nonperson profile to provide access to HCM; i.e. training requirements and replace current forms? ES will investigate and work with campuses.
- Question – Can we add training that is not listed in Skillsoft? Would be nice to have all training in one place.

- Answer: ES will investigate and work with campuses.

Boulder: Still need to have exception statute field; still being asked to provide reports as to why the jobs are exempt; don't care where that indicator resides but still need it.

- Answer: This will be set up on non-person profile

Boulder: Can the system query on the approval lines; would like that; this is needed to prevent tracking in shadow systems; need to have individual names, rather than roles;

- Answer: it is role based and role level. You can see who the approval role by name; can set up approvers in different ways

Question: Will we need to have approval role for contracts?

- Answer: ES will investigate and work with campuses.

Question: Could we have different path/profile by campus to feed information from PeopleAdmin?

- Answer: This will require a number of customizations. This will be decided by the HR Directors.

August

Next month we will be sharing the Boulder wish list and the status of those requests; any items from other campuses will be added to the Boulder list.