



## Agenda

<b>Meeting Date &amp; Time:</b>	April 8, 2014 – 10:00am – 12:00pm
<b>Meeting Location:</b>	Room 100 – 1800 Grant Street
<b>Meeting Facilitator</b>	Lisa Affleck

<u>Discussion Topics</u>	
Agenda Items	Presenter
<b>Topic 1:</b> Operating Principles & New System Changes	Lisa/Lezlie
<b>Topic 2:</b> Taleo Update	Carolyn
<b>Topic 3:</b> Personal Information Fit/Gap	Cindy/Lezlie
<b>Topic 4:</b> Manager Dashboard & Smart Hire Fit/Gap	Cindy/Cindy M
<b>Topic 5:</b> Discuss Role of PPLs and Supervisors in Job Transactions & Approvals	Lisa/Lezlie
<b>Topic 6:</b> Self Service Feedback	Group
<b>Topic 7:</b> Reporting vs Queries (Including Training Requirements)	Group

**Notes:**

1. Reviewed **Operating Principles**...Discussed decision chain and communication efforts. Stressed that advisory role is to share information (changes/enhancements) with others on the campuses. Discussed using HCM as delivered with PS best practices. Explained that we would avoid any evasive customizations and pursue other existing options in HCM.
2. Discussed access to system in December for end users. We will have our database in June. We will be working on the necessary upgrade steps to complete a functional CU database. The intent is to have the system set up and running with CU data for our power users/Advisory Group.
3. **Taleo** – Spent last 6 months addressing issues with PeopleAdmin. Explored delivered eRecruit, PeopleAdmin, and Taleo. Teamed with HR Offices and key users and talked with other universities that use either eRecruit or Taleo. Universities included Stanford, Oklahoma, University of Texas Medical Branch, and University of Missouri. Oklahoma is going with 9.2 and Taleo (replacing PeopleAdmin) ahead of us so they will be a valuable resource. Created comparison checklist for HR Directors to make a decision on recruitment application. As part of these conversations ES ensured external vendors and interfaces will work. Expectation is to roll Taleo and HCM at the same time. Oracle bought Taleo as it is the leader in Applicant Tracking Systems. We will also be rolling On-Boarding with this implementation.
1. **Personal Data** – Discussed the customizations and what would and would not be moved into 9.2. **Name search** – 9.2 allows a drop down option that will make it easier to search for employees. Group liked dropdown option. Highest level education comes from HR and is maintained in CIW. ES will map this data to the Education field for employee profiles. Group suggested feed from Taleo as part of the on-boarding process. HCM will have better data on Vets and Disability. Asked how **Home Department and Campus Box** are used. Discussed if the campus box could be incorporated into location at the job level (position). UCB – Arts and Sciences will provide information on how they use Campus Box and Home Department so we can see if there is another way to address their needs. *Recommendation: Use Mail Drop ID In Position Data. This will be maintained by HR staff and HR Business Partners. Queries can be run on these fields in CIW.*
4. Discussed primary job –Group raised the issue of not being able to see if an employee had a job at another campus. ES thought this was possible in 9.2, ES will need to look at security and will follow up. Discussed email, system access and account set-up. Currently IT has a separate process to create email addresses and logons. This will be discussed with Campus IT.
5. Develop status code for probationary status to eliminate adding a second row in Job Data. (To be discussed in Job Data Fit/Gap).
6. What should the Manager's role be? Could they start an action or should they be the one to approve? Group felt most managers won't get into the system as they see this as part of the process not an approval. They might access to check the status of an action (e.g., status of a promotion). If they can enter the narrative for Performance Management they might go into the system.
7. Discussed Self-Service, I-9, Paycheck Modeler.
8. More people use CIW for reporting. Would like to see ES set up queries.

Group asked what customizations are currently in place. ES will forward Fit/Gap that documents what will or will not role forward. The customizations that impact the campus users the most are the campus box, funding distribution, approvals, and contract pay.

**Next Month:**

Talk about position and job data, and if time funding distribution.