University of Colorado
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Agenda

Meeting Date & Time:	July 3, 2014 – 10:00am – 12:00pm
Meeting Location:	1800 Grant Street
Meeting Facilitator	Lisa Affleck

Discussion Topics

Agenda Items	Presenter
Introduction: Consultant, Vicki McKoy-EL	Lisa
Topic 1: Non-Person Profiles	Lisa/Lezlie
Topic 1a: Benefits of using Profiles in 9.2 and Profile Demo	Lisa/Lezlie
Topic 1b : Vacant and Inactive Position Data in PeopleSoft & People Admin	Lisa/Lezlie
Topic 1c: Required Training needed for individual Non-Person Profiles	Lisa/Lezlie
Topic 1d: How many Non-Profile types are needed?	Lisa/Lezlie
Topic 2: PeopleAdmin – What fields are necessary?	Lisa/Lezlie

Action Items (carried until completed)

	Action	Assigned To	Due Date	Status
1	Action Reason Feedback			
2				

Notes:

Position and Non-Person Profiles:

Handouts: Data flow for positions and non-person profiles

Powerpoint

Demo: Demonstrated 9.2 sample of PeopleAdmin University Staff and Faculty position vs- How the PeopleAdmin profiles would look in 9.2.

Areas HR offices need to review for Position and Non-Person Profile configuration:

- Approval process - when does HR really need to approve – after position is created and entered or after profile has been created? Do we really need approvals at both position and profile? What will help the user to their work done in one seating?
- Where do the Budget approvals fit? Are these off-line approvals? Does a meeting need to be set up to determine? Will each campus be different?
- Do you need a pre-form for approvals when have the intent to hire someone for a position? After approval is received department would then enter position information and profile creation then HR approves for recruiting? This process might cause lag time if a department creates a position, then has to wait for multiple approvals (including HR). Then the profile is created which also has to go through the same multiple approval process before they can start the recruiting process. What will help our users get through the process quicker?
- What is it that you really need to have? What do you want to track? How do we want to go about doing business?

PeopleSoft intends for profiles to be created using education, duties/tasks, and competency libraries. These libraries store all typical duties/tasks and competencies that could be used to create a profile for the position.

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- PeopleAdmin has brief position descriptions. If current data is converted, how many tasks are we going end up having? Data needs to be converted logically.
- Do the HR Offices want to start looking at the tasks that were created in PA and do we need to standardize or simplify? May need to have general tasks in 9.2. Additional details can be created in a job description area within Position Management instead of using a task area.

Colorado Springs is currently discussing ADA compliant job descriptions. Looking at the job accommodation network they have some things that are essential functions that aren't tracked in PeopleAdmin so should they be addressed at this point? It would be best to address these now before going live with 9.2.

When a position is created the position number will be the same profile number (for tracking and historical purposes).

HR Offices:

- How do we want to bring data over from PeopleAdmin to HCM 9.2?
- Currently we have duties in PA – what do we really want to feed over and what makes the most sense? PS has a catalog of tasks (each task has an ID). This catalog is used to create future profiles. How are we going to create a catalog of duties to pick from going forward? We create duties based on statements we have today in PA or create generic duties and then try to map
- Do we need common descriptions of competencies, tasks and duties?

Boulder campus – does the system have the capability to move over the data from PA with the duties as is? This is critical. The HR office would promote the use of standardized next time it is updated? Lisa - There are ways that this can be done; however, you would not be able to query the data. But, the data would be there. For example, we could move all of the data to the detailed description field. Need to start thinking about how we should be doing duty statements and how to use the system going forward.

Janet Lowe – it would be useful to keep the language consistent. What is duty? What is a task? What is competency? What is foundational competency? What is function? **HR needs to decide what these mean. *ES will draft sample language for the HR Offices to edit and approve*.**

The job families that were created have foundational steps for every job.

HR - need to add an essential function flag to job duties and tasks. This will also help with ADA requirements.

Denver campus – questioning the synching and timing of this project and how much can we really do with ADA. Is it really a good idea to move over data from PA? Should the campuses do a rigorous content analysis of what is there and move over what they really want? This would require each campus (each is probably a little different) to do an analysis and review of the content across job families and then have a conversation about how to take the content and frame as competency and over to essential functions. **Will Denver campus lead this analysis coordinating with Colorado Springs and Boulder? Can ES pull sample data from PeopleAdmin by Job Family/Job Class and provide as a starting point for the HR Offices?**

<u>**Demo of the non-person profile**</u>

We discussed requirements for handling of hazardous material currently in 8.9 position data (customizations in 8.9).

<u>Decision</u> – This will now be located in the non-person profile along with the required HIPAA access, background check, overtime eligible and the essential services indicator. Campuses will be able to query these fields.

Janet – can this be tracked with the training to make sure that they have taken the compliance training that is required? Lisa – we will check on this; at this point we don't know what is possible.

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HR Offices:

How do we determine training? Do we ask yes/no questions when the position is being created?
Do we populate required training for current vs new? Is this campus specific? University Staff, Classified and Faculty have different required training?

University and Classified Staff were combined in PA into one template because of limitations in PA. **Can this partnership be split since HCM does not have a problem with separating**? Do we leave these alone? This might be a good time to start talking about this as we may have to do this because of a current lawsuit. **What do the HR offices want**?

Approval Question –

Do we request approvals at the position or do we create the position and allow the position to create the profile and then require approval path at the profile and the position requires approval here? Which way do you want to go?

Do we need to track the exemption statue? Should electing exemption be in profile since it is "person" specific?

Question to HR –

Where should Budget be in the approval process – can they stop the process? What do they need to approve? Where does the comp analysis come in for the budget office? What department approvals need to happen? Need to look at all the approvals that are currently being done.

Export Compliance –

Are there or could there be triggers in the system? Is Profile the place to have these triggers?
Export compliance training is required for grant funded positions.
Is export compliance currently being maintained in a separate data base?

Evaluate Inactive positions in PS 8.9 and PeopleAdmin– How many need to be kept and what can be archived –

<u>Decision</u> – We don't want to create profiles for inactive positions that will never be re-activated. Need to cleanup.

Required Training –

How to collect data?
How to ask business partners to fill this section out on the profile?
Should we use yes/no questions? Example: Is the position responsible for completing expense reports? If so, it would need Concur training.

Denver campus had requested tracking of faculty teaching, research and service which is 40/40/20 on their campus. Answer – This can be accomplished in HCM 9.2 Non-Person profile. You will also be able to add competencies and ADA.

We will need to have detailed mapping sessions for future meetings – Is this the group meeting to go through these? We are looking to HR for direction as this is their system/data.