



## Agenda

<b>Meeting Date &amp; Time:</b>	October 2, 2014 – 10:00am – 12:00pm
<b>Meeting Location:</b>	1800 Grant Street Room 607 (Denver Conference Room)
<b>Meeting Facilitator</b>	Lisa Affleck

<b><u>Discussion Topics</u></b>	
<b>Agenda Items</b>	<b>Presenter</b>
<b>Topic 1:</b> Project Status – what we have been doing	Lisa/Lezlie
<b>Topic 2:</b> Review/Finalize Non-Person Profiles	Cindy
<b>Topic 3:</b> Review/Finalize Person Profiles	Carolyn/Cindy
<b>Topic 4:</b> Taleo Update	Carolyn
<b>Topic 5:</b> Discuss break out teams needed	Lisa
<b>Topic 6:</b> Review Action/Reasons and workflow documents	Lisa
<b>Topic 7:</b> Review Agenda for Campus Meetings, including BP Mtgs	Lisa

<b><u>Action Items (carried until completed)</u></b>				
	<b>Action</b>	<b>Assigned To</b>	<b>Due Date</b>	<b>Status</b>
1	Action Reason Mapping	Lisa		
2	Summary Statement on Working Group Projects	Lisa		
3	Screenshots on PA Profile Templates to Upgrade Group	Cindy		
4	Comments on Action Reasons back to Lisa	Campuses	10/31/14	
5	Highest education mapping document	Jen		

### **Notes:**

#### **Project Status:**

- Individual Business Units by campus instead of one for the University as a whole. Business Units will be tied to FIN. May have unique setIDs so various compensation ranges for the job codes will be allowed. This can be controlled by security so campuses only see their job codes. Comment: For some positions security may be needed across campuses.
- Finishing Leave Accrual and it will remain the same except that pay groups will drive benefit eligibility.
- Trying to run distribution process to GL differently. Working with FIN to streamline this process and hope to have a decision by the end of October that will be shared with the group. Current customization adds together FTE for multiple jobs and books to full time position, new system books to each job – doesn't work for allocations. How do we provide a flag?
- Working on Funding Distribution page that will be shown in the future. How do we distribute taxes and benefits? Each campus will be set up differently. EMPL Code will no longer be used so it will not add FICA rows for student appointments. This will be managed separately.



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- SmartERP will help with forms but don't have contract finalized. Changing to Enterprise License so FIN and CS may be able to use in the future.

## Profiles:

- Campuses are in agreement on the Job/Person Profile prototypes as currently designed.
- There will need to be further discussion on Kenexa data and the use of current CU Job Families. We may need to expand our job families. This will need to be communicated to the campus users that we will be moving away from position specific job descriptions.
- These are also linked to ePerformance.
- Required Training – SkillSoft is a separate interface and this is still being worked on.

## TALEO:

- Decided to postpone On-Boarding to February or March because of the work involved and a strategic discussion needs to occur regarding what Onboarding should look like.
- Held 3 day meetings on Recruiting and will have weekly meetings in October. Test environment should be available by November. We will also be working on Integrations and have been engaged with UIS and will be determining which integration tool to use. Want the feeds to be as close to live time as possible. Test scripts and resources will begin in January, and at that time we will try and work on the integrations into HCM.

## HCM Training:

By end of February 2015 we will have a HCM training plan with training in summer/late fall. In October we will focus on specific new user training.

## Breakout Teams:

1 – Reporting. Use CIW, PS Query, Custom, 3000 reports are delivered that were not available to users. What kinds of reports are required? Need to review the 3000 delivered and see what works and eliminate customized reports/queries where possible. Taleo has its own CIW and we need to analyze how these will be tied together.

2 – Compensation. With different pay groups we can have different earnings codes (Ex: Faculty 9 mo and 12 mo). We will investigate how compensation could be changed and/or enhanced. Address additional pay vs creating a separate position. Kickoff will be around November/December.

## Action Reasons:

Action Reason mapping will be sent to the Upgrade group. We need to talk about Auto Terms and SWBs. Is the Other reason necessary? Correction Mode will be addressed in the future. Can we have a 'Correction Form' that is routed for approvals, why it was done, who provided guidance on setting the action up this way, etc.? How should Disciplinary actions that result in reduction of pay be handled? Campuses are expected to update/change definitions. Need these finalized by October 31<sup>st</sup> as this will impact how SmartERP creates the forms.

Group agreed to eliminate the Auto Term process in Job.

## Campus Meetings:

Advisory Meetings: Paygroups, Business Units, project updates, Profile Demos.

Business Partner Meetings: Branding for Upgrade is Elevate. Talk about this in all meetings to address both HCM and FIN. Giving out Carabineers and since the online survey only provided 23 responses, we will have clickers to get actual feedback and will add responses to the wish list.



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## Personal Data:

1. CU Custom Page
  - a. Maintain custom fields and pages – displayed mockup page – effective dated page
    - ii. Privacy Flag – based on a restraining order. Do people have an option to select this flag? Primarily for UCB, if flag is on, don't display data on web site.
    - iii. FERPA will be in the student area – need to discuss security; who has access to student pages
2. Highest Education level
  - a. Scale back from today and go to delivered. Now – 200 codes, Jen is mapping to delivered codes. – this data is inconsistent. Taleo will update the person profile.
3. Ethnic Group Codes

Expand codes to Visually Identified Caucasian, etc. Will not be available in self-service or Taleo. Mapping will be done by ES
4. Campus Box
  - a. What do we do with campus boxes for employee's with multiple jobs?
  - b. Primary job – active job in a department = HOME – mark as primary or lowest active job row (empl\_rcd), use that as primary, if not exist, then just lowest job.
  - c. Emergency Management Plan
  - d. Question – Location Codes and Emergency Management Plans – How do we find people? Such as a roster? Need more discussion. Location codes and even campus box are more building specific. This might be a post go live project

## I-9

Determining whether HireRight, SmartERP (PS) or Taleo will be the solution. Proposed solution will be brought to this group in the near future.