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Agenda

Meeting Date & Time:	August 7, 2014 – 10:00am – 12:00pm
Meeting Location:	1800 Grant Street
Meeting Facilitator	Lisa Affleck

Discussion Topics

Agenda Items	Presenter
Topic 1: Phase I Milestone Complete	Lisa/Lezlie
Topic 2: Phase II Kick Off	Lisa/Lezlie
Topic 3: Profiles – Updates and Decisions	Lisa
Topic 4: Update: Action/Reason–next steps with Forms & Reporting	Lisa/Cindy C
Topic 5: Business Process Flow Document	Lisa/Lezlie

Action Items (carried until completed)

	Action	Assigned To	Due Date	Status
1	Complete the spreadsheet that identifies roles and workflows for various transactions	Kym, Florie, Tracy, Susan	8/29/14	In progress
2				
3				

Notes:

Topic 2 - Phase II Kick Off

- All documents from our meetings will be posted on our website and our new website should be ready within the next few weeks. The website will be broken down by project phases and then by business process. Will also have a new blog site where you can subscribe. By subscribing, you will be sent notifications when updates are made to the web site.
- Finished phase 1 and now into detailed design and development phase
- Detailed Design documents need to be completed by November; which will require signoff in October
- Working with the Oracle upgrade lab who are now responsible for each upgrade
    - Complex upgrade - go from 8.9 to 9.0 and then 9.0 to 9.2
    - Multiple steps needed
    - Getting rid of most customizations and just adding the ones you helped to us to determine were required for business needs
    - Next upgraded database will be around Oct/Nov timeframe; hope to get you into the database in Dec/Jan timeframe
- Also going through unit testing

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- Will be asking for your help to identify people to test for us
- Need to validate and get approval for final decisions for our detailed design
- Confirm that the delivered processes work
  - July – going through test plans
  - Aug/Sept – will schedule meetings with you
  - Oct- campus signoff
  - Nov – finalize Functional/Technical Detailed Design document
- Decisions re: Financials is re-evaluating fit/gap documents and conducting additional sessions with campus users. There are many dependencies between HCM and FIN and we are also bringing in a consultant (from Ohio State) who will help reduce customizations
- Reporting is a huge topic; it will be covered during the detailed design phase
- Will be having conversations with this group as decision makers; will be a month gap in what is covered in the follow up campus meetings
- Forms – have 2 finalist vendors; both can provide for all systems (HCM/FIN/CP); design of those forms will come a little later; hope to have a decision by end of August on vendor; not connected to the detailed design phase; we want to make the forms simple; targeting low end users; not taking away functionality for high end users

Topic 3 – Profiles (updates and decisions)

- Met with HR directors on Monday re: approach for university and classified staff;
- University staff is most complex
  - Currently there projects underway using IBM Kenexa for both salary and competencies
    - Working on creating templates that would have many of the generic job responsibilities as a start to the job description
    - Also competencies will eventually move into performance plans
  - We have in PeopleAdmin
    - Duty statements and job postings will be converted
    - Looking to make it more generic when possible
    - Compliance information
  - Also have compliance info in position data which will trump PeopleAdmin data
  - Planning to compile training data to create a training program at position level
- Classified staff
  - Some data is provided by the state of CO (e.g., job codes, minimum quals)
  - Would pull in a lot of the same data from PeopleAdmin
  - Not sure how foundational competencies will be used here
- Student
  - Need some sort of profile for this group
  - Just going to take data from position to create compliance/training programs
  - Not much to pull out; job summary will not be required
  - HIPPA/Compliance data is what is tracked today; starting to ask some basic questions like the need for access to certain systems; most likely be defaulted into 'NO" and then you can change it
  - Job summary will be available if it needs to feed into Taleo
- Faculty / Research Faculty/Clinical Faculty
  - Will work to group these together
  - Will be similar approach as that for students
  - Will have job summary available if you plan to use Taleo for this group

  - Will include how is the faculty distributed (Research, Teaching,Leadership/Service); also will be optional
  - Any faculty that has a posting in PeopleAdmin will be converted into the job summary for that person
  - Clinical faculty have different workflow in Boulder
  - Not sure how temp faculty are used; what is really the definition of temp faculty?
  - Also have admin faculty who have a different work flow in Boulder
  - May be different by campus and that can be addressed;
  - The profile may look the same but the workflow may be different
- Questions about profile setup and next steps
  - Hoping by October timeframe some of this will be converted and then can be reviewed by this group
  - Possibly be using Taleo for temps using a basic profile to include compliance; will need something similar to student
  - All types of temps can be grouped together? Not sure if classified temps need to be separated; there are some workflows that are different; if workflow is different, they should be separate
  - Classified will be separate
  - Student/grad student should be separate because Work Study applies to undergrad; Work Study will be included in undergrad
  - Retirees who return to work? – Do they need to fall into the job category into which they are being hired? Would the work flow be different? Similar but different; retirees are more similar to temps; put as placeholder until the detailed work is being done
- POIs do not have a profile but we will be able to track training - be sure to include in detailed design

Topic 4 – Update: Action/Reason

- Still over 80 action/reasons after the consolidation and elimination which means there would need to be 80 forms. In your review, start thinking about "can we combine codes?"
- Are there things we are trying to report on? Should we have leave codes? FML is example discussed
- For Work Study/student changes, can we put that info in a different area so that we don't have to insert rows for each type of change? We will no longer use employee class for student retirement changes in 9.2.
- Lots of different position changes with different types of approval; how much info do we really need?
- For job codes, with no change in pay, do we need to update records; what do you need to report on?? Think about what changes HR doesn't need to approve.
- Excel spreadsheet has different roles for approval; are there other people who need to be added to this form? Need to look at what needs to happen for each type of action; roles will ultimately be assigned a security role; add student employment;
- Intent is to use similar language but approval flow can be different for each campus; this assignment is the first attempt at creating workflow and thus, role based auto-assigned
- Form is entering the information required for that action; after approval, the info would be uploaded to HCM
- Want to use workflow approval engine to route for approvals which will eliminate many approval customizations
- Roles for spreadsheet is for 9.2 and what you want to track
- Can have an initiator who can also approve; the approvals go in order of the columns; can add initiator/approver as an option
- Off-cycle issues - PS provides a retro-pay option that may help
- Also have the option with multiple approvers; could have approver 1, approver 2; have up to 5 approvers; reviewers will not stop the process; can also have ad hoc reviewers (like contracts/grants) which won't be built into approval process but can be added
- This will become our roadmap as we build forms, approvals, etc

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- Who will take on the lead for each campus? (Names were provided in the meeting). What action/reasons do we need to approve
- Denise Weir will be responsible for managing this campus assignment. Who should Denise work with to collect this information? The spreadsheets will be sent out by next Tuesday and return by end of Aug.; in Sept meeting we will consolidate data and present findings, make changes and will take this data to our campus groups in October.
  - Boulder assignment – send to Kym Calvo and she will bring to Boulder team
  - Florie for Denver
  - Susan Watson) for UCCS
  - Tracy for systems
- To look at historical actions, you can pull up that individual through the dashboard/work center
- There are some action/reasons that are not being used and will be removed from 8.9

Second piece is Boulder Wish List

- Will be discussing with campus groups next week
- There are a handful of things that can't be done because they are invasive customizations
- How should we start to respond to this?
- A lot have to do with forms/ workflow/notes
- The one "no" that we have is about adding effective sequence to position data; may be resolved by creating a form to ask for a correction
- Time collection is still in design phase; Lisa A will collect all of the info but will be brought back to this group for discussion
- Wish list will eventually be posted to website without the names of those who raised the individual items.
- The authentication process – originally said HCM would be going under MFA; now there will be a broader discussion that will include other system owners (CP, FIN)

This group will meet in Sept (first Thursday of Sept) Sept 4 and HCM team will NOT have campus meetings for September