To-Be Process Review Workshop

Human Resources
E-Recruitment Series

ROSS 120

8:00 a.m. – noon

September 28, 2005

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Welcome!

- In attendance today:
  - West Lafayette employment
    - » including Physical Facilities and Housing and Food Services Units
  - Calumet HR
  - North Central HR
  - Fort Wayne HR
  - Affirmative Action Office
  - HR Computing
  - Business Management

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Workshop Logistics

- Tent Cards
- Rest Rooms
- Breaks
- Parking Lot

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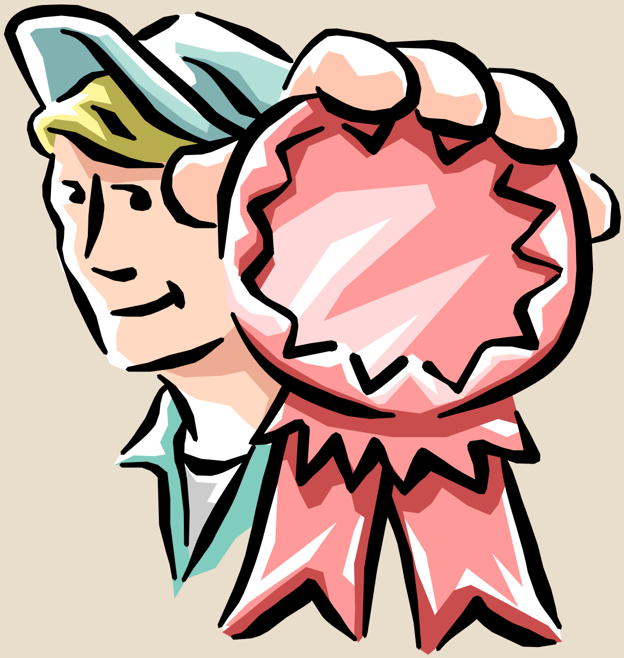
Workshop Agenda

1. Discuss workshop objectives, rules and principles
2. Discussion of Talent Relationship Management
3. Break
4. Discussion of Candidate Processing
5. Capture issues in the “parking lot”
6. Adjourn



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Why Are We Here?

Our objective today is to…

- Discover
  - SAP terminology, definitions, and capabilities
  - Specific opportunities for business transformation
  - Best practices in the context of the SAP implementation
  - Documented future process and any system gaps
- Validate
  - "To-Be" business processes
  - Required policy changes
  - Process acceptance by core process owners, advisory committees and University leadership
- Facilitate communication and change management for
  - The future state of Purdue University
  - Integrating people, processes and technology in the future.

What Have We Done to Prepare?

To prepare for this workshop, we have…

- Researched best practices
  - SAP software is the best practice source
  - As in the OnePurdue Guiding Principles, SAP software WILL NOT be modified
- Developed proposed business processes
  - The "To-Be" business processes were developed utilizing the best practices found in the SAP software
- Reviewed and refined proposed processes with knowledgeable staff in key operational positions
  - Presented proposed processes
  - Gathered feedback, learned of gaps and implemented changes as necessary

What is Your Role?

Today, we need you to…

- Review and validate the proposed process
- Identify gaps in the proposed process
- Identify organizational challenges
- Help us facilitate change management

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What will come from this Meeting?

The output from this meeting includes…

- A business process review report
- To-Be process flowcharts
- Gap analysis report
- Functional specifications report

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Workshop Ground Rules

- Respect time
- Respect process
  - Stick to agenda topics
  - One subject discussed at a time
- Respect one another
  - One conversation at a time
  - Cell phones and Blackberrys turned off
  - Listen
- **Stretch**
- Keep the end in sight
- Work to gain consensus on terminology
- **Silence means agreement**
- Issues will be parked and resolved outside the meeting

OnePurdue Guiding Principles

1. ERP is an institutional-transformation project, not an information-technology project. Information technology merely provides the opportunity for, and enables, the business transformation.
2. **Create and enforce common business practices.**
3. All campuses will participate financially in the ERP implementation.
4. There will be a system-wide implementation of a single ERP product, a single operational database and a single warehouse.
5. **The ERP software and database will not be modified. This is often called a “vanilla” implementation.**
6. Ensure a timely (and on-schedule) implementation of the ERP system.
7. Any “bolt-ons” to the ERP software and database will not be implemented until the budget and schedule implications are understood, agreed upon and funded by the Executive Oversight Committee.
8. **All campuses will contribute knowledgeable and empowered personnel to the core implementation teams.**
9. **The project teams and all governing bodies will resolve issues quickly and decisively.**
10. The ERP management team will communicate, communicate and then communicate more in order to keep the University community informed.
11. The ERP software will be tested until exhaustion to ensure operations and regulatory and legal compliance.
12. Sufficient resources will be committed to ERP user-training prior to implementation.
13. The technical infrastructure and network will be sufficiently robust to support the ERP before it is implemented.

Signed July 15, 2004, by Executive Vice President & Treasurer, Provost and Vice President of Information Technology and CIO.

BPR Guiding Principles

1. “OnePurdue Guiding Principles” will apply.
2. Scope: Critical business processes for HR, Finance and Campus Management.
3. Primary best-practice source = SAP and third-party bolt-on solutions (return-on-investment opportunity).
4. Subject Matter Experts (SME) will be empowered by process owners to make key decisions regarding processes.
5. Enterprise processes will adhere to software best-practices – flexibility in implementation.
6. Disposition for exceptions to best practices:
   a. Termination of process
   b. Work-Around: “User Exit” w/o code modification
   c. Off-the-shelf bolt-on
   d. Offline operation
7. Process owners and key stakeholders “buy-in” validation required.
8. All best practices (5) and exceptions (6) must be integrated into the OnePurdue system.
9. Successful BPR also requires:
   a. Executive commitment
   b. Effective change agents to drive best practices and overcome resistance
   c. Appropriate organization structure
   d. Institutional willingness to consider radical change

Let's Get Started!

Our topic today is…

- *E-Recruitment*
  - » *Talent Relationship Management*
  - » *Candidate Processing*

What is Talent Relationship Management ?

- An advanced talent database that enables recruiters to plan for, find, track, and manage potential candidates.

- Find suitable candidates for open positions, by providing advanced searches for ideal candidates.

Talent Relationship Management

- Applicant completes profile (initially).
- Information that a recruiter would run searches on would be pulled from the candidate profile sections.
- Applicants must “release” their profile for the recruiter to find them in the talent pool.

Talent Relationship Management

- Recruiter conducts a search of the talent pool
  - View candidate match list
  - Select the candidates of interest
  - View their Profile
    - History of what they have applied for and the associated activities
    - Overview of profile/resume
    - Notes (attachment)
  - Make decision and flag to send notification
- Notifications are sent out to potential candidates providing information on the “matching” position and details of how to apply (if interested).

Initial Recruiter Page

Personal Pages

These are your personal pages for recruitment tasks. You can make your personal settings and call all required services from here.

Talent Relationship Management

You want to view candidates' data in the Talent Pool or assign these candidates Talent Relationship Management activities.
Talent Relationship Management

Requisitions

You want to create or edit requisitions, search the Talent Pool for suitable candidates for requisitions, or approve status changes.
Maintenance
Approval
Candidate Selection

Application Management

You want to access candidates' data, edit or enter applications, or send correspondence from correspondence activities.
Candidate Overview
Applications
Enter Internal Application
Enter External Application
Correspondence

Reporting

Predefined reports help you display the current status of the data. You can save reporting results and reuse them at a later date. Simultaneously, the reporting results are sent to you by e-mail.
Reporting

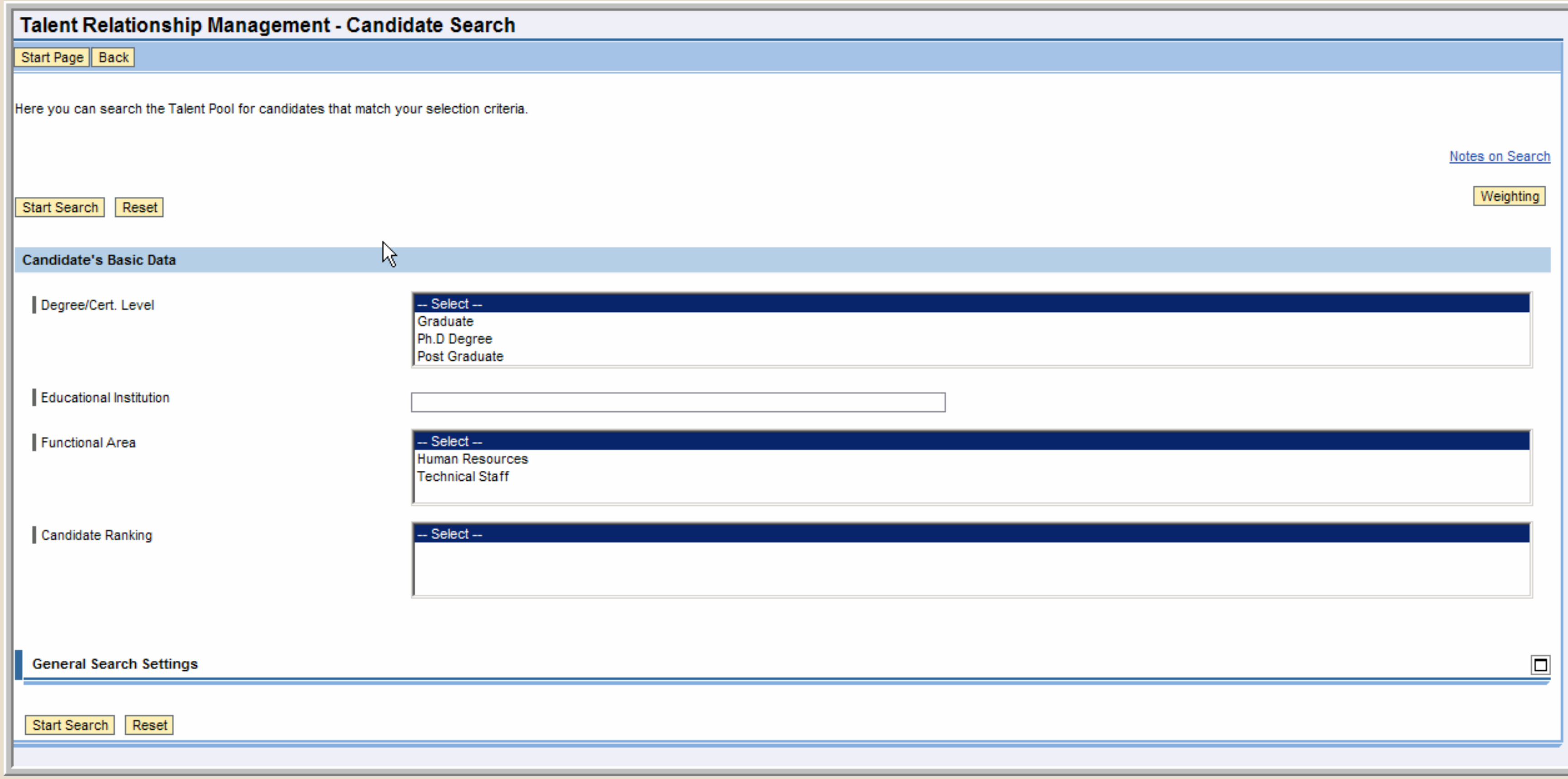
Administration

You want to create or edit questions, questionnaires, or process templates for later use.
Questionnaire Maintenance
Question Maintenance
Process Templates

Personal Settings

You can tailor your pages to suit your personal requirements. This includes defining your preferred date format, decimal display, the language you prefer to work in, and the display format for data overviews.
Personal Settings

Candidate Search



Candidate Profile

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Data Maintenance: Employee

Start Page | Back

Candidate Applicant 1 MV / West Lafayete IN 47906

Here you can enter and update the employee's candidate profile.

Data Maintenance: Employee | 1 Work Experience | 2 Education | 3 Qualifications | 4 Attachments | 5 Data Overview

Education

Describe the candidate's work experience to date.

List details of the candidate's previous work experience.

Work Experience

	Start Date	End Date	Employer	City	Country	Job Title
	09/01/2000	09/12/2005	XYZ Industries	Kingsport	USA	Systems Manager

1 of 1

New Entry | Edit | Delete

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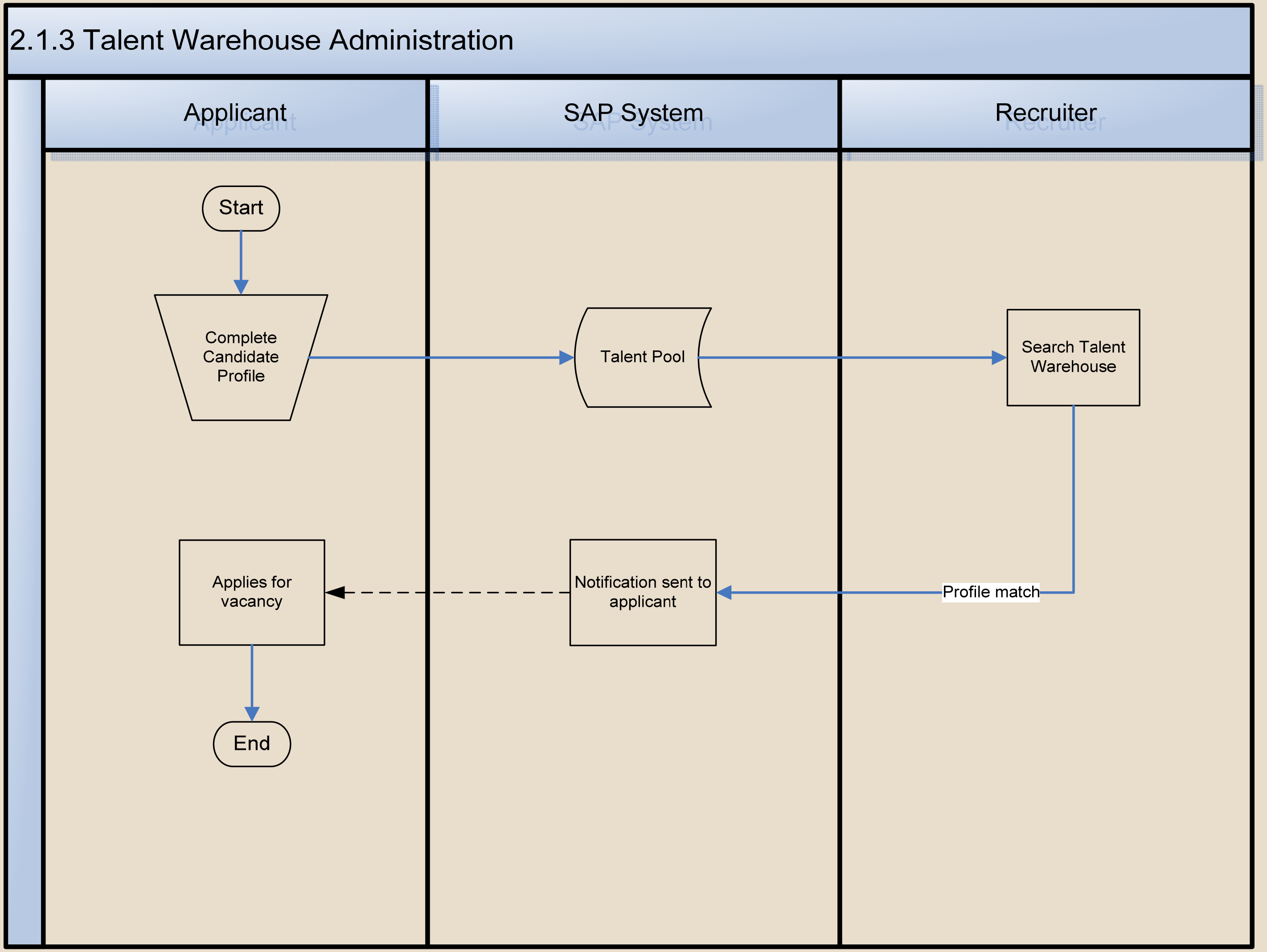
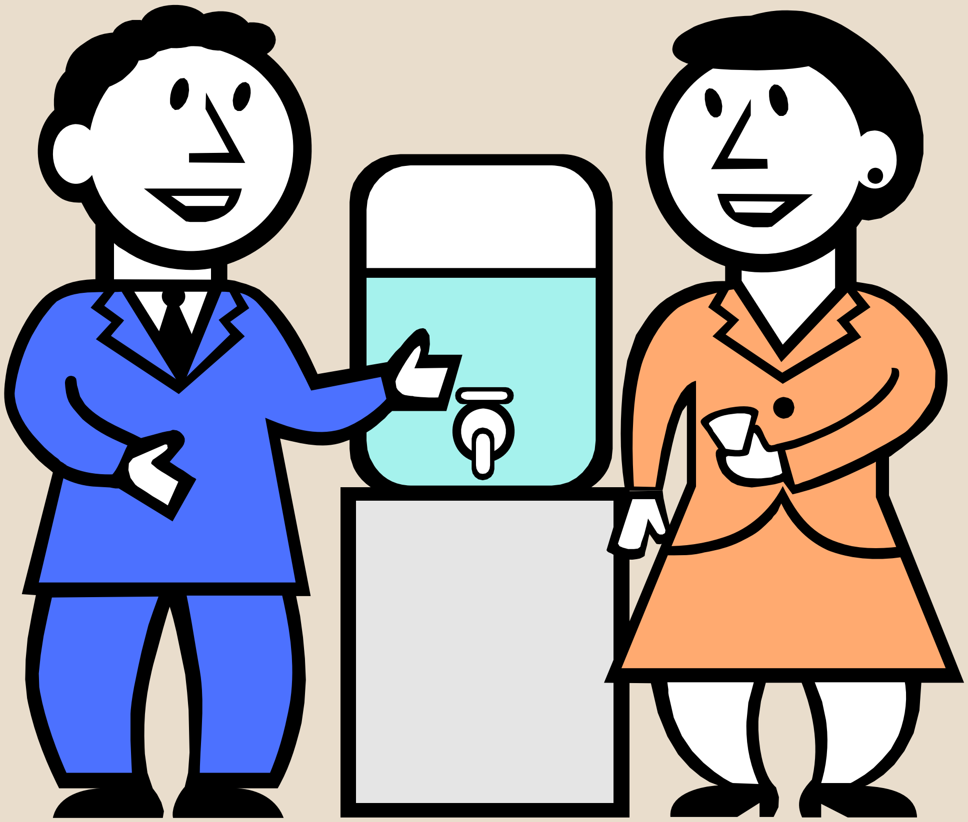
Process Flow



Break Time



Candidate Processing

- Candidate referrals will automatically populate the recruiter requisition.
- The candidate material will be forwarded to the hiring manager for consideration.
- Candidate information is stored in the talent warehouse for future consideration.

Candidate Overview

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Candidate Overview

Start Page | Back

Candidate [Applicant 1 MV / West Lafayete IN 47906]

Here you can see the candidate's assignments to requisitions and application groups. Select Applicant Tracking to obtain an overview of all Applicant Tracking activities. Choose Talent Relationship Management to obtain an overview of all TRM activities.

Assignments | Applicant Tracking | Talent Relationship Management

Here you can process assignments to requisitions and application groups.

Assignments

Application	Title	Type	Assigned On	Status	Process	Activity
50000326	Requisition NB50000302	Requisition	09/19/2005	In Process		
50000306	Requisition NB50000302	Requisition	09/15/2005	In Process	Selection Process	Hiring Supervisor Interview

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Edit

Candidate Profile

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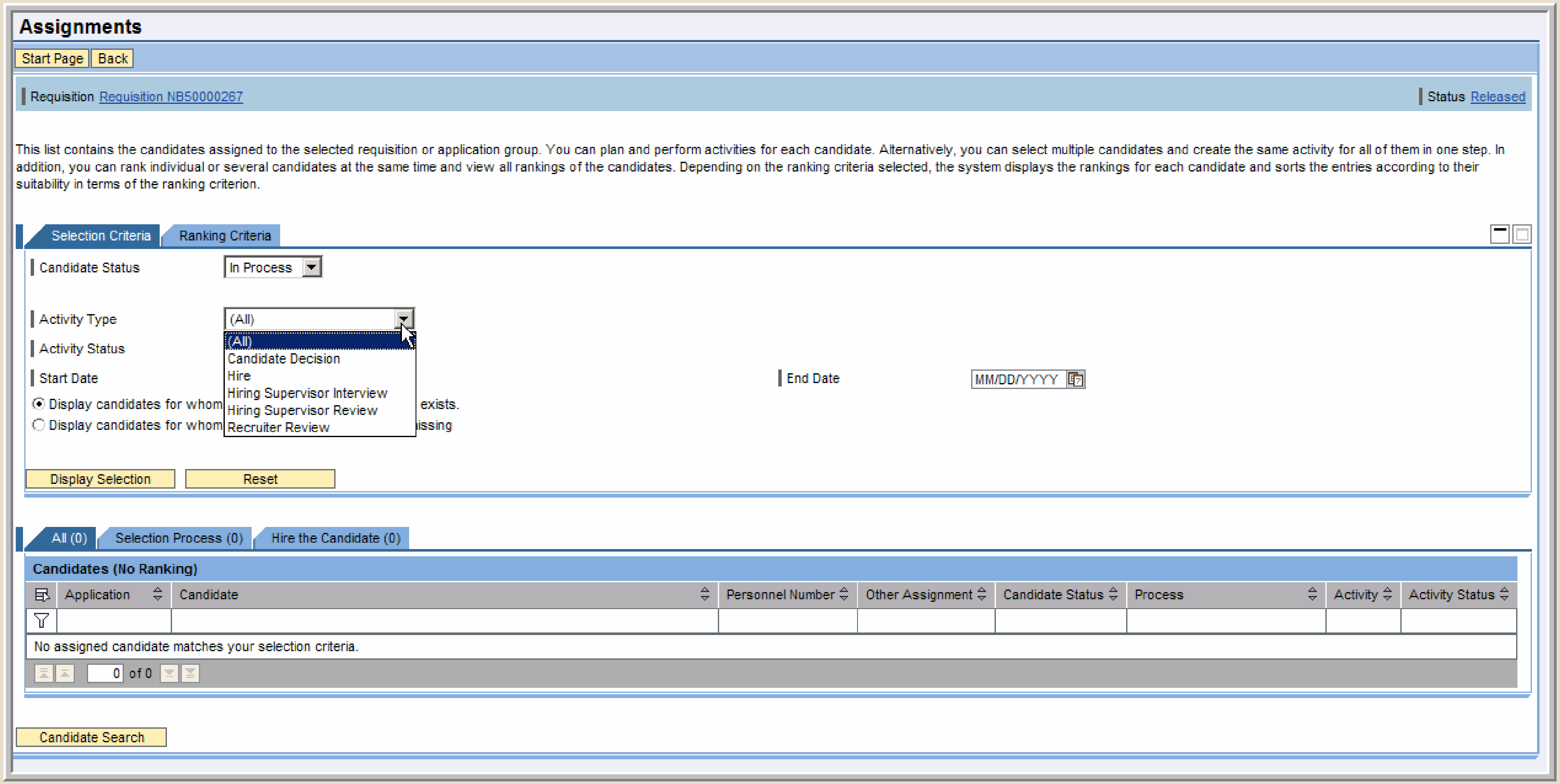
Update Candidate Assignment



Assignments

Start Page | Back

Requisition Requisition NB50000267 | Status Released

This list contains the candidates assigned to the selected requisition or application group. You can plan and perform activities for each candidate. Alternatively, you can select multiple candidates and create the same activity for all of them in one step. In addition, you can rank individual or several candidates at the same time and view all rankings of the candidates. Depending on the ranking criteria selected, the system displays the rankings for each candidate and sorts the entries according to their suitability in terms of the ranking criterion.

Selection Criteria | Ranking Criteria

Candidate Status: In Process

Activity Type: (All)

- (All)
- Candidate Decision
- Hire
- Hiring Supervisor Interview
- Hiring Supervisor Review
- Recruiter Review

Activity Status

Start Date | End Date MM/DD/YYYY

Display candidates for whom ... exists.

Display candidates for whom ... issing

Display Selection | Reset

All (0) | Selection Process (0) | Hire the Candidate (0)

Candidates (No Ranking)

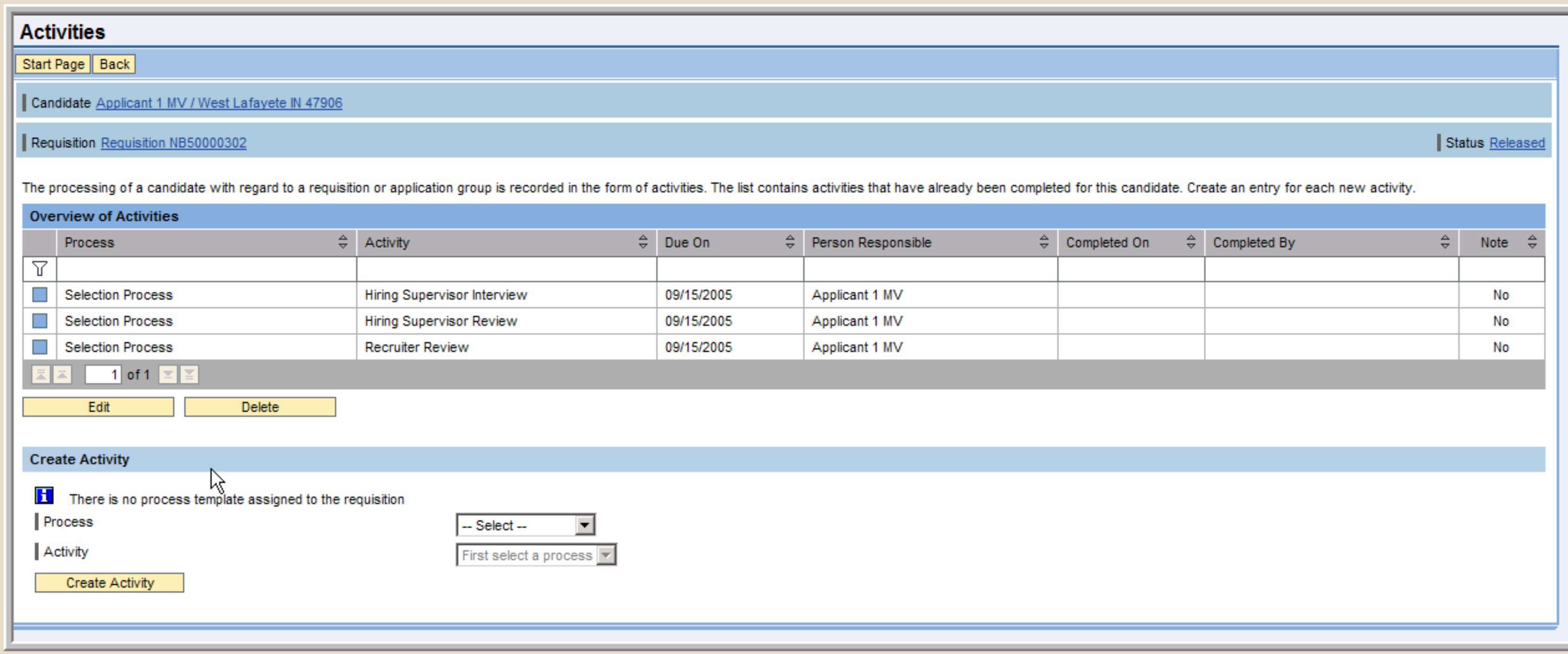
Application	Candidate	Personnel Number	Other Assignment	Candidate Status	Process	Activity	Activity Status

No assigned candidate matches your selection criteria.

0 of 0

Candidate Search

Update Candidate Activity



Activities

Start Page | Back

Candidate Applicant 1 MV / West Lafayete IN 47906

Requisition Requisition NB50000302 | Status Released

The processing of a candidate with regard to a requisition or application group is recorded in the form of activities. The list contains activities that have already been completed for this candidate. Create an entry for each new activity.

Overview of Activities

Process	Activity	Due On	Person Responsible	Completed On	Completed By	Note
Selection Process	Hiring Supervisor Interview	09/15/2005	Applicant 1 MV			No
Selection Process	Hiring Supervisor Review	09/15/2005	Applicant 1 MV			No
Selection Process	Recruiter Review	09/15/2005	Applicant 1 MV			No

1 of 1

Edit | Delete

Create Activity

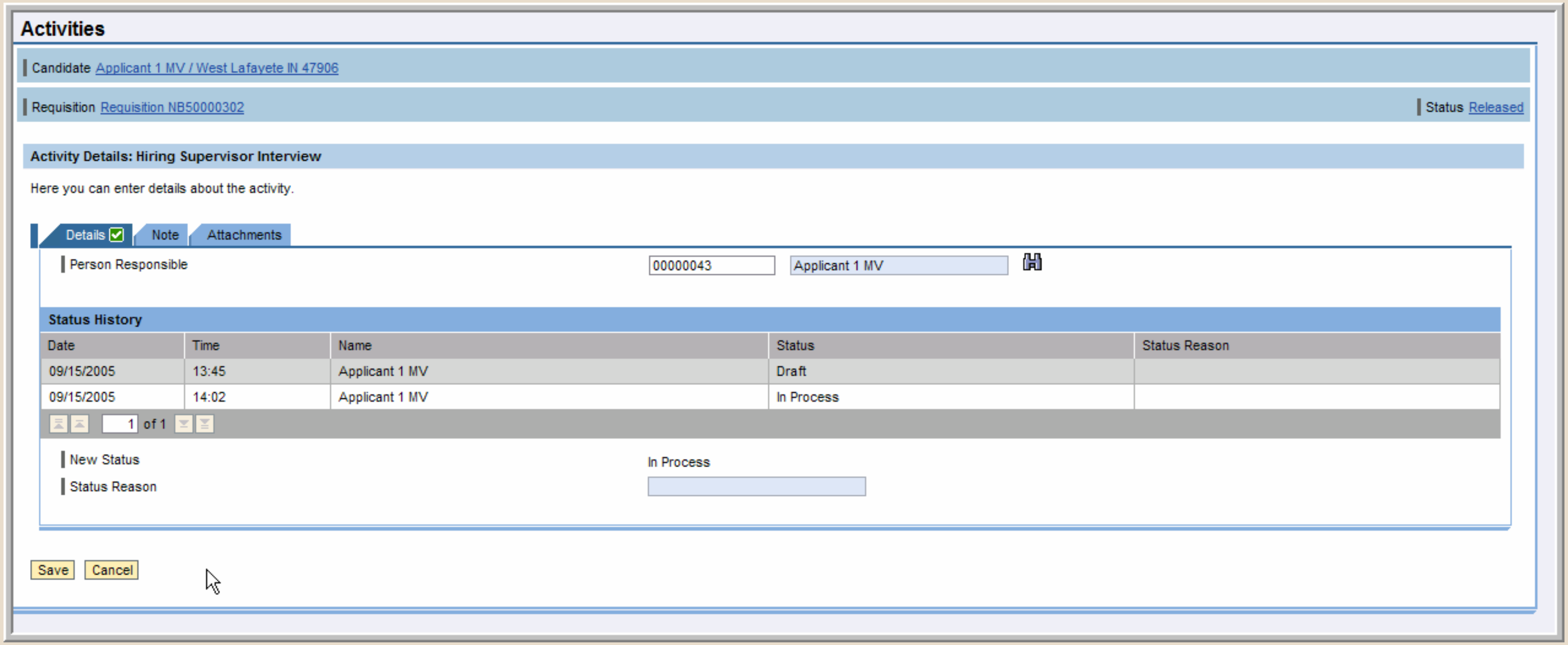
There is no process template assigned to the requisition

Process: -- Select --

Activity: First select a process

Create Activity

Update Candidate Activity (next step)



Activities

Candidate Applicant 1 MV / West Lafayette IN 47906

Requisition Requisition NB50000302 | Status Released

Activity Details: Hiring Supervisor Interview

Here you can enter details about the activity.

Details | Note | Attachments

Person Responsible 00000043 Applicant 1 MV

Status History

Date	Time	Name	Status	Status Reason
09/15/2005	13:45	Applicant 1 MV	Draft	
09/15/2005	14:02	Applicant 1 MV	In Process	

1 of 1

New Status In Process

Status Reason

Save Cancel

Candidate Tracking

- Activity – **Recruiter Review**

- Status Reason -
  - **Meets Requirements**
  - **Does Not Meet Requirements**
  - **Candidate Withdrew**
  - **Posting Cancelled**
  - **Late Referral**
  - *** (Blank)**

**** Indicates that additional status reasons must be completed for tracking to be final.***

Candidate Tracking

- Activity – **Recruiter Interview**

- Status Reason -
  - **Meets Requirements**
  - **Does Not Meet Requirements**
  - **Candidate Withdrew**
  - **Posting Cancelled**
  - **Others More Competitive**
  - **Compensation Too Low**

Candidate Tracking

- Activity – **Hiring Supervisor / Search Committee Review**

- Status Reason –
  - *** Intent to Pursue**
  - **Others More Competitive**
  - *** Request Screening**
  - **Candidate Withdrew**
  - **Posting Cancelled**

** Indicates that additional status reasons must be completed for tracking to be final.*

Candidate Tracking

- Activity – **Hiring Supervisor / Search Committee Interview**
- Status Reason –
  - **Others More Competitive**
  - **Offer Extended**
  - **Compensation Too Low**
  - **Posting Cancelled**
  - **Candidate Withdrew**
  - **Future Interest**

Candidate Tracking

- Activity – **Decision**

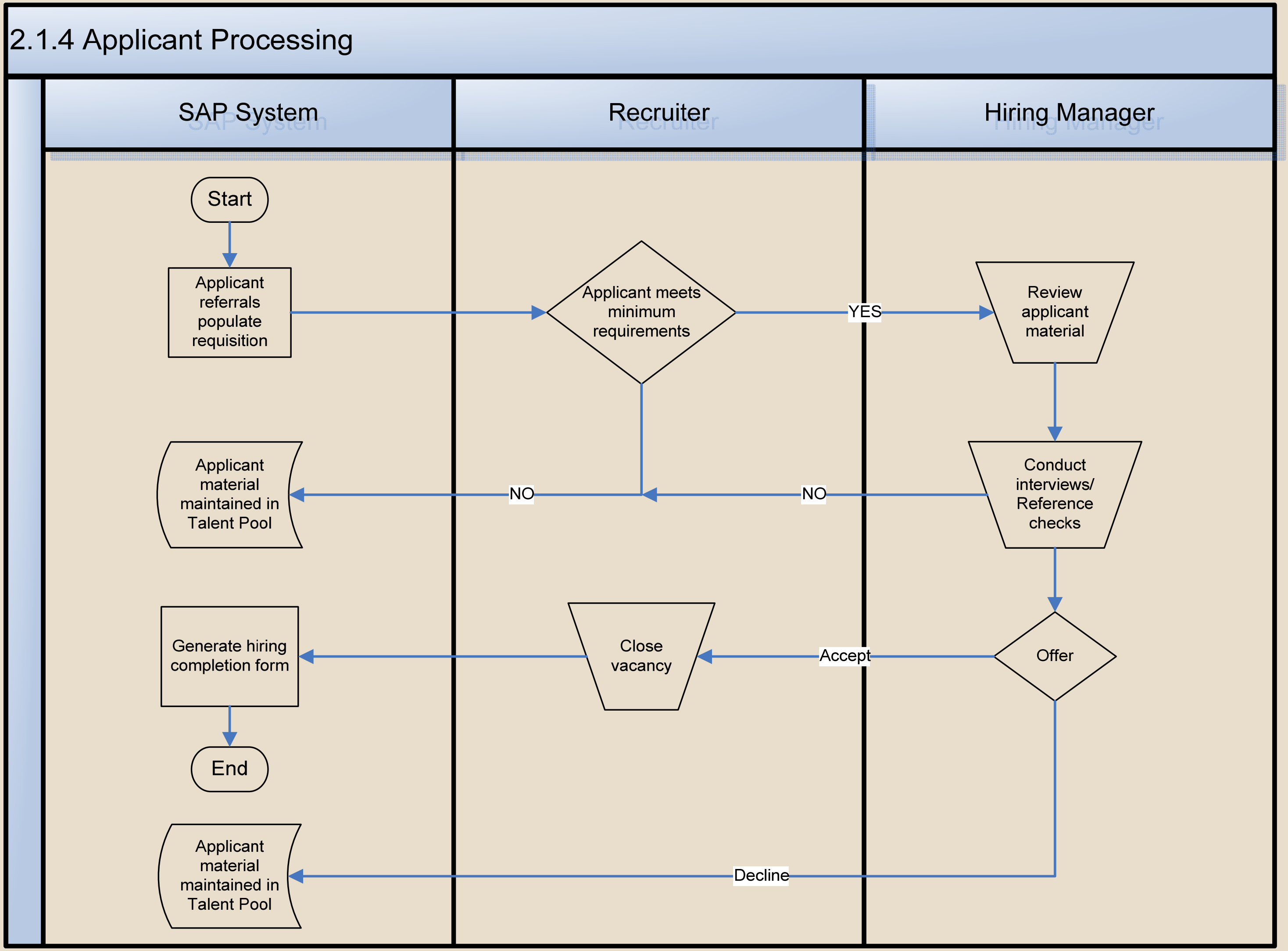
- Status Reason –
  - **Accept**
  - **Decline**

Candidate Processing

- The candidate's application status section will be updated with "position closed" when the position is officially filled.

- A report will be generated, upon completion of the hire, to provide the necessary information for the hiring completion form.

Process Flow



Additional reports and / or audits necessary …

- Please email additional to amyclawson@purdue.edu by 10/5/05

Key Performance Indicators (KPI)

- 90 % Applicant material submitted electronically
- Reduce lapse time between request to post and actual posting – Goal 24 hours
- 80% Return PIF-SIF (Faculty EEO info too)
- Applicant manages their own job self-service = reallocate recruiter time involved in customer service
- EEO data 1-2 days instead of weeks to audit for workforce snapshot

KPIs described here are indicative of general objectives. During the Blueprint process, we will consider end-to-end processes in developing specific metrics associated with these metrics.

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Questions ? ?

- Thank you for participating !

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