To-Be Process Review Workshop

Human Resources
E-Recruitment Series

ROSS 120

8:00 a.m. – noon

September 28, 2005
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
Workshop Logistics

- Tent Cards
- Rest Rooms
- Breaks
- Parking Lot
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
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
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
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.
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.

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Talent Relationship Management</strong></td>
<td>You want to view candidates' data in the Talent Pool or assign these candidates Talent Relationship Management activities. <a href="#">Talent Relationship Management</a></td>
</tr>
<tr>
<td><strong>Requisitions</strong></td>
<td>You want to create or edit requisitions, search the Talent Pool for suitable candidates for requisitions, or approve status changes. <a href="#">Maintenance</a>, <a href="#">Approval</a>, <a href="#">Candidate Selection</a></td>
</tr>
<tr>
<td><strong>Application Management</strong></td>
<td>You want to access candidates' data, edit or enter applications, or send correspondence from correspondence activities. <a href="#">Candidate Overview</a>, <a href="#">Applications</a>, <a href="#">Enter Internal Application</a>, <a href="#">Enter External Application</a>, <a href="#">Correspondence</a></td>
</tr>
<tr>
<td><strong>Reporting</strong></td>
<td>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. <a href="#">Reporting</a></td>
</tr>
<tr>
<td><strong>Administration</strong></td>
<td>You want to create or edit questions, questionnaires, or process templates for later use. <a href="#">Questionnaire Maintenance</a>, <a href="#">Question Maintenance</a>, <a href="#">Process Templates</a></td>
</tr>
<tr>
<td><strong>Personal Settings</strong></td>
<td>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. <a href="#">Personal Settings</a></td>
</tr>
</tbody>
</table>
Candidate Search

Talent Relationship Management - Candidate Search

Here you can search the Talent Pool for candidates that match your selection criteria.

Start Search  Reset

Candidate's Basic Data

<table>
<thead>
<tr>
<th>Degree/Cert. Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
</tr>
<tr>
<td>Graduate</td>
</tr>
<tr>
<td>Ph.D Degree</td>
</tr>
<tr>
<td>Post Graduate</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Educational Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Functional Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
</tr>
<tr>
<td>Human Resources</td>
</tr>
<tr>
<td>Technical Staff</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Candidate Ranking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
</tr>
</tbody>
</table>

General Search Settings

Start Search  Reset
# Candidate Profile

## Data Maintenance: Employee

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

### Work Experience

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Employer</th>
<th>City</th>
<th>Country</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/01/2000</td>
<td>06/12/2005</td>
<td>XYZ Industries</td>
<td>Kingsport</td>
<td>USA</td>
<td>Systems Manager</td>
</tr>
</tbody>
</table>

New Entry  Edit  Delete
Process Flow

2.1.3 Talent Warehouse Administration

<table>
<thead>
<tr>
<th>Applicant</th>
<th>SAP System</th>
<th>Recruiter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start</td>
<td>Complete Candidate</td>
<td>Search Talent Warehouse</td>
</tr>
<tr>
<td>Profile</td>
<td>Talent Pool</td>
<td></td>
</tr>
<tr>
<td>Applies for vacancy</td>
<td>Notification sent to</td>
<td>Profile match</td>
</tr>
<tr>
<td>End</td>
<td>applicant</td>
<td></td>
</tr>
</tbody>
</table>
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

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.

Here you can process assignments to requisitions and application groups.

<table>
<thead>
<tr>
<th>Application</th>
<th>Title</th>
<th>Type</th>
<th>Assigned On</th>
<th>Status</th>
<th>Process</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>50000353</td>
<td>Requisition</td>
<td>Requisition</td>
<td>09/19/2005</td>
<td>In Process</td>
<td>Selection Process</td>
<td>Hiring Supervisor Interview</td>
</tr>
<tr>
<td>50000354</td>
<td>Requisition</td>
<td>Requisition</td>
<td>09/15/2005</td>
<td>In Process</td>
<td>Selection Process</td>
<td></td>
</tr>
</tbody>
</table>

Candidate Profile
Update Candidate Assignment

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 criteria.
Update Candidate Activity

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

<table>
<thead>
<tr>
<th>Process</th>
<th>Activity</th>
<th>Due On</th>
<th>Person Responsible</th>
<th>Completed On</th>
<th>Completed By</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selection</td>
<td>Hiring Supervisor Interview</td>
<td>09/15/2005</td>
<td>Applicant 1 MV</td>
<td></td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Selection</td>
<td>Hiring Supervisor Review</td>
<td>09/15/2005</td>
<td>Applicant 1 MV</td>
<td></td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Selection</td>
<td>Recruiter Review</td>
<td>09/15/2005</td>
<td>Applicant 1 MV</td>
<td></td>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>

### Create Activity

- There is no process template assigned to the requisition
- Process: 
- Activity: 
- Create Activity
Update Candidate Activity (next step)
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.
2.1.4 Applicant Processing

<table>
<thead>
<tr>
<th>SAP System</th>
<th>Recruiter</th>
<th>Hiring Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start</td>
<td>Applicant meets minimum requirements</td>
<td>Review applicant material</td>
</tr>
<tr>
<td>Applicant referrals populate requisition</td>
<td></td>
<td>Conduct interviews/Reference checks</td>
</tr>
<tr>
<td></td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td></td>
<td>PA</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>Generate hiring completion form</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>End</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>Applicant material maintained in Talent Pool</td>
<td>Conduct interviews/Reference checks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>YES</td>
</tr>
<tr>
<td></td>
<td>Close vacancy</td>
<td>Offer</td>
</tr>
<tr>
<td></td>
<td>Accept</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Decline</td>
<td></td>
</tr>
<tr>
<td>Applicant material maintained in Talent Pool</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.
Questions ??

- Thank you for participating!