Joint Banner HR Pre-Design Advisory Group Meeting
Pontiac, Illinois
April 20, 2005

Notes

Opening Remarks

John Loya convened the meeting with some opening remarks regarding expectations. The purpose of the meeting was to confirm the responses of the campuses to the four deliverables. As the business case was still under development, the pre-design team would not be presenting a draft business case.

Important Design Considerations

The advisory groups were asked to provide the design considerations that they felt were important for the success of the front end. The following considerations were identified, in no particular order of importance:

Routing	Whole person view
Review	Business Rules
RJASEAR	Position/job relationship
User friendliness	Data integrity
Security	Position creation/maintenance
Pay adjustments	Business Case
	Flexibility

Discussion of these issues was the last agenda item of the meeting.

Pre-Design Project Summary

The pre-design project team gave a PowerPoint presentation summarizing the activities of the project, thus far. The presentation included background on the pre-design project, the requirements underlying pre-design, and a review of the responses for each of the four deliverables (including the campus response components, campus consensus items, and campus items lacking consensus).

In general, the campus items that lacked consensus were thought not to be material enough to impede the design of a front end application.

A copy of the presentation accompanies these notes.

Deliverable 1 Observations

- The front end application should be flexible. It should be able to be altered based upon changes in policy or union contracts.
- The front end could be flexible in more than one way. It could be flexible in terms of the software or in terms of business rules. Some projects are constructed where the software drives the business rules. Other projects have the business rules drive the software design.
- It was hoped that the front end would be constructed so that the business needs of the organization drove the design of the software.
- Perhaps review level should be thought of in terms of how many levels of review are needed, not who needs to review it.
- One approach would be to create a "staging area" that could help with the levels of review. Once a decision was made on a personnel action, it could be entered into the staging area and routed for approval through the college to HR, if policy review was needed. After the approvals, it could be submitted at the appropriate time without the need for re-keying information.
- Campuses would still determine what units would become/remain processing centers.
- A question was asked about a slide mentioning the donation of FTE to staff a service center. It was clarified that the slide pertained to UA, not the campuses.
- There were differences between the campus responses with regard to what level of the organization would submit and be accountable for the transaction. However, those differences could be worked out in design.

Deliverable 2 Observations

- UIC clarified that a design working group would be created as a subset of the current advisory group to work with design team members. That structure might change at different points during the design phase to meet the needs of the campus and the project.
- During other projects, the campuses had felt that their views were not taken into consideration during the design phase. The communication structure created within Deliverable 2 was designed to ensure that the campuses had a mechanism to be heard.

Deliverable 3 Observations

- The question of what the pre-design team felt was lacking from the campus responses was asked. The reply was that the campus deliverables did not detail exactly what is was expecting the HR, Provost, and other offices to review.

- The question of why the pre-design team needed to know what HR was going to review was asked. The reply was that the expectations of the departments and colleges needed to be communicated to these offices. The HR office needs to know what data elements it is expected to check so that it can ensure it has sufficient resources to meet the expectations of the departments and colleges. An example, of a service level agreement between AITS and UOHR for their desktop support was used to illustrate the need to define expectations and resources.

- The question of whether HR needed to review every data element was asked. The answer was "Yes."

- A clarification was made that the definition of HR was the campus operational HR offices.

- It was suggested that if the design team knew the data elements that HR or other offices were reviewing, it could either hide or gray out data elements that they were not checking.

- The question was asked if the application had the whole person view, then why would screens need to show only pieces of the data. The reply was that it would highlight what HR needed to review and reduce overall review cycle time. HR would only review the items that they were accountable for.

- The campuses have told the pre-design team what they wanted. So, the design team should not be designing screens that don't meet their needs. The reply was that group should not be precluding any kind of design elements in the pre-design phase. Assumptions about design elements should not be imposed on the design team before they have a chance to begin their process.

- There needed to be an agreement on what the expectations of the departments and colleges were for reviewing transactions. The reply was that the HR offices should tell the academic units what HR will be accountable for, and the academic units will be accountable for the rest.

- It would make sense for E-class to help define what needed to be routed. That is why the campuses completed Deliverables 3 and 4 by employee group.

- It was then asked how E-class did not meet the pre-design team needs. The reply was that E-class alone did not specify what was actually going to be checked. Agreement on what is to be checked would satisfy the need for the business case.

- The campus HR offices should be accountable for all data elements. The reply was that HR should not be responsible for FOAPALs.

- The group needed clarity on this matter. The question was asked how the group was going to get that clarity. The reply was that the campuses have told the pre-design team what it needed. Only HR knew all of the rules and it looked at FOAPALs for notice rights.

- There needed to be a distinction made between technical design and how the solution is used. The reply was that there seemed to be an argument over semantics.

- The question was asked as to why the group was even discussing this. The reply was that it was a discussion necessary to ensure data accountability.

- It was suggested that accountability could be looked at in terms of E-class.

- Upon returning to their units, campus representatives would be asked by their deans if they had been listened to during the meeting. Their answer would be that the pre-design team had not listened to their concerns.

- The question was asked whether the pre-design team had changed its position and would allow routing to HR. The reply was that the pre-design team had never precluded routing to HR. However, in previous advisory group meetings, it had taken the position that the advisory groups should look at other alternatives to routing, such as developing business rules that would eliminate some of the need for routing. The pre-design team had asked the advisory groups to think “out of the box” and not default to routing.

- It was suggested that the group assess the time remaining for the meeting and what could be accomplished. A reply was that the presentation should go forward so that the group could see where there was campus consensus and where there was not.

- When Deliverable 4 was sent to the campuses, the advisory group members thought that the definition of overrides was how often they changed or added information in Banner HR that was submitted from the departments. The reply was that the definition was intended to be overrides of Banner HR defaults. However, the pre-design team felt that it had received what was needed to determine if there needed to be any Banner HR configuration changes.

Design Phase Framework

The pre-design team presented a framework for the design phase, based on initial discussions with AITS. The framework consisted on three design phases including: functional, technical, and product rollout. An iterative design methodology was contemplated for both the functional and technical design phases.

The items listed within the framework are included in the presentation accompanying these notes.

Observations on the Design Phase Framework

- The advisory groups needed to know how much time, work, and knowledge members of the design team needed. Did the pre-design team contemplate a change, from the Stage II template, in the number of design team members needed for the project? The reply was that the pre-design team felt the number of design team members listed in the State II template was sufficient. Also, it was critical to know what the application functions were going to be before assessing what will be required of the design team members.

Discussion Following Design Phase Framework

- The advisory groups need to make a recommendation to the Provost after the meeting. Their inclination was to propose a "No-Go" on the project based upon the meeting. The reply was that the pre-design team needed to know why the advisory groups felt they were not being heard.

- The degree of specificity for the design that was coming out of pre-design was going to tie the campuses down. The application needed to be flexible.

- The question was asked whether the group should continue the meeting to discuss the items identified as important design considerations. The group responded that the meeting should continue.

Discussion on Important Design Considerations

Routing and Review

- The group agreed that there was no material difference between the terms routing and review. Routing is the mechanism for how the transaction is reviewed.

- The front end should have one data entry point. That would avoid mistakes of dual data entry.

- If a change is made to a transaction, the change needs to be communicated back to the originator of the transaction.

- The number of review levels could be dependent upon on the transaction type and E-class associated with the transaction.

- There needs to be a tracking mechanism to see the status of the transaction. This should include who has viewed and made changes to the transaction and when those actions occurred.

- The front end needs to allow multiple units to see the transaction status, when the transaction involves more than one unit.

- The routing mechanism for ECOS could be used as an example of routing in the front end.

- The front end should allow for flexible horizontal routing, including routing within the same unit, as well as routing from unit to unit.

- A list could be compiled of which high level employee groups do and do not require routing.

- There needs to be a definition of who is reviewing what data elements for the purposes of data integrity.

- The organization code could be used to determine what a user can and cannot change.

- The question of what kind of routing system is being considered was asked. The reply was that the pre-design team had not proposed any particular method. However, one method could be that reviewers are selected from a drop down list based upon the organization code.

- It was suggested at lower levels of routing, a person could be picked off of a list. At higher levels, the transaction could be sent to a group. The tracking system should have a mechanism to show who in the group acted on the transaction and when that occurred.

- Should include a comments section or other method where the originator can communicate with the reviewer.

RJASEAR

- The group agreed that the discussion of RJASEAR needed to occur outside of this meeting. Discussions would be held between the campuses on how RJASEAR would be accounted for.

User Friendliness

- View should include employee and their job information.

- Items could be grayed out that don't apply to specific transactions. There was concern that this feature might be costly to code. The reply was that it probably would not be that costly, as it could accompany the coding of the business rules.

- Design elements need to be standardized and perform the same function throughout the application. A style guide could be implemented to standardize the interface.

- A transaction was defined as all of the actions done to a specific employee's record prior to hitting the submit button.

- Required campus documentation should route with a transaction.

Security

- Front end security should be based upon the user's role. Such as, a person might only be able to do Civil Service transactions.

- An administrative module should be constructed, allowing a unit to set up security and a college to approve it.

- Security should have a view-only access mechanism.

Pay Adjustments

- HR and payroll transactions need to be integrated within the Front end.

- The Front end should allow anticipated pay adjustments to accompany the transaction.

Whole Person View

- Position information should be available in the whole person view.

- Include an option for changes to job labor distribution to be reflected in the position.

Business Rules

- Ensure position title and P-class match.

- Front end should have ability to show vacant positions within an organization code.

- Need to have a single environment where an entire transaction can be completed, rather than a mixed environment.

- A mechanism for units to request that a position be set-up by HR, for certain E-classes.

- Do not allow certain overrides, such as changing the E-class associated with the position.

Position/Job Relationship

- The group felt that this was covered within the discussion on whole person view.

Data Integrity

- The group felt that this was covered during the rest of the discussion.

Business Case

- Campuses see the ROI for multiple routing levels outweighing the up front cost of creating a routing mechanism within the application.

- Features requested by the advisory groups may be split into two or more iterations of the application. The campuses will prioritize the features into those that are required in the first iteration and those that are required subsequently.

Flexibility

- The group felt that this was covered during the rest of the discussion.

<u>End of the Meeting</u>

- A concern was raised that the project timeline was too short. There needed to be a greater focus on the quality of the product rather than the speed of development. The reply was that the pre-design team was aware of the need for quality, however, it was also aware of the desire of campus officials for the project to be completely quickly.

- The group was asked if they felt that their views had been heard by the pre-design team. The group indicated that they felt their views had been heard.