

ECU Human Resources 2018 Talent Management Conference Featuring



PEOPLEADMIN

Performance Management

Security, Integrations, the
Supervisory Structure, & Data
Best Practices

Dan Blumberg
Director, HR Information Systems



Security Overview: Performance Management (PM)

Reviews Dashboard

Reset Program: Employee Name Group by:

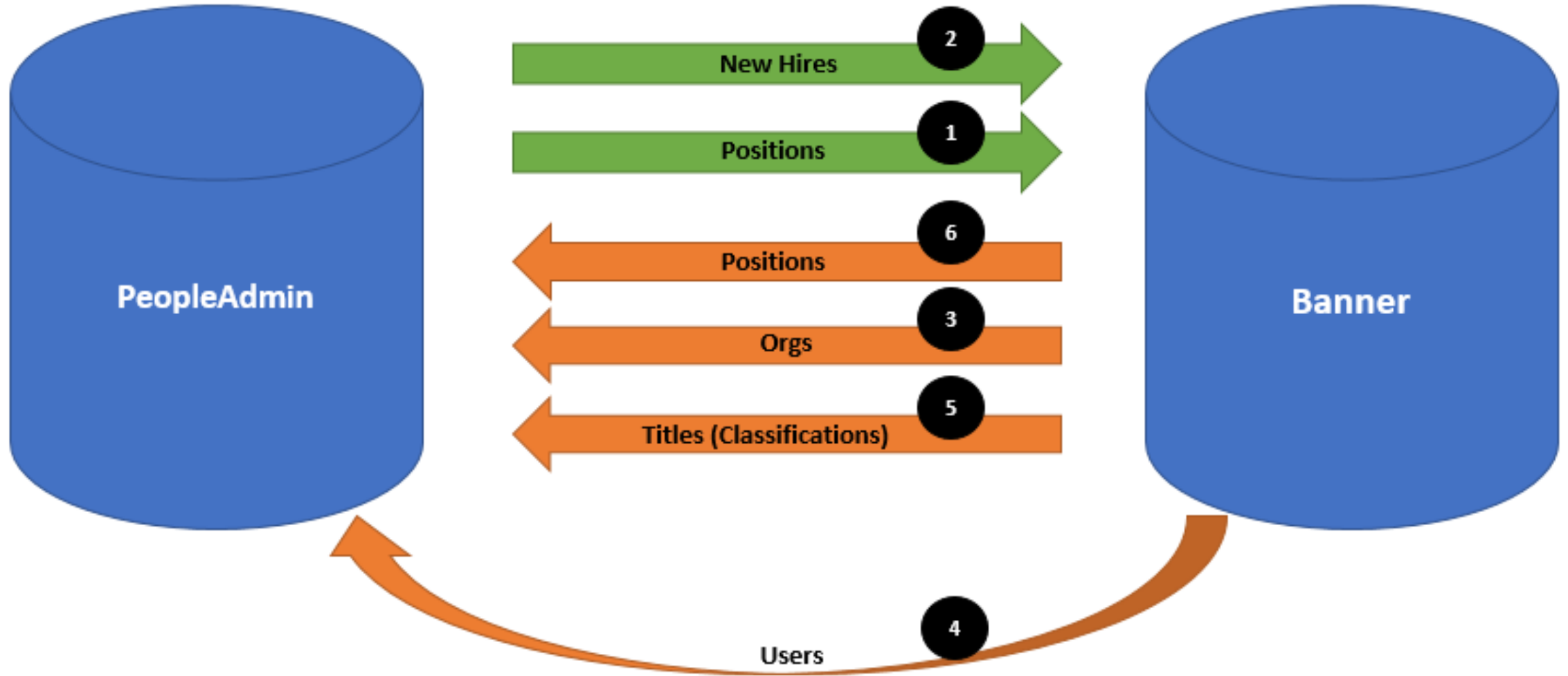
All Reviews 6 Not Started 0 In Process 6 Complete 0 Overdue 0 Disputed 0

| Last name | First Name | Anniversary Date | Progress | Program |
|---|------------|------------------|--|---|
| 2017-2018 SHRA Annual Performance Program 6 | | | | |
| Smith | Mae | 2012-12-16 | 4/8 <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | 2017-2018 SHRA Annual Performance Program |
| Rickman | Denise | 2007-07-01 | 4/8 <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | 2017-2018 SHRA Annual Performance Program |
| Carawan | Donna | 2012-09-01 | 4/8 <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | 2017-2018 SHRA Annual Performance Program |
| Wells | Barbara | 2015-01-01 | 4/8 <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | 2017-2018 SHRA Annual Performance Program |
| Buck | Jeffrey | 2017-05-16 | 4/8 <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | 2017-2018 SHRA Annual Performance Program |
| Cope | Allen | 2015-09-01 | 4/8 <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | 2017-2018 SHRA Annual Performance Program |

Previous 1 Next

- A little different from Applicant Tracking and Position Description
- User types are not required
- Doesn't use orgs
- Access assigned dynamically based on supervisory structure; no TD ticket required

PeopleAdmin Integrations Overview



Integrations: What Data Feeds PM?

✔ User Details [Edit](#)

Account Information

| | |
|------------------------------------|----------------------------|
| Username | blumbergd14 |
| External Authentication Key | blumbergd14@ecu.edu |
| First Name | Daniel |
| Middle Name | Evan |
| Last Name | Blumberg |
| Email | blumbergd14@ecu.edu |
| Employee Org Unit | East Carolina University |
| Employee ID | B01047138 |
| Base Job Begin Date | 02/02/2015 |
| Probationary? | No |
| Employee Type Description | EHRA Non-Faculty |
| Interim Required? | No |
| Employee Class | E2 - SAAO IB FT |
| Position Type | EHRA Non-Faculty |
| Reporting Org Unit | AFH HR Information Systems |
| Default Module | Applicant Tracking |
| Password | |

- Daily user integration has largest impact on PM
- Information from PEAEMPL, NBAJOBS, and NBAPOSN in Banner
- No errors in PeopleAdmin; if something is off, likely an error in Banner



Integrations: What Data Feeds PM?

Oracle Fusion Middleware Forms Services: Open > PEAEMPL

File Edit Options Block Item Record Query Tools Help

Employee PEAEMPL 8.12.2.4 (PBAN)

ID: B01047138 Daniel Evan Blumberg

General Employee United States Regulatory Canadian Regulatory

Employee Status: Active

Employee Class: SAOA IB FT

Employee Group: EPAN EHRA Non-Faculty

Leave Category: LF SAOA IB

Benefit Category: BC All Ben/Ded (except SFB)

Part or Full Time Status: Full Time

Allow New Hire Benefits Enrollment

Home Department: E 220130 AFH HR Information System

Check Distribution: E 220130 AFH HR Information System

District or Division: 205 Human Resources

Service Dates

Current Hire: 02-FEB-2015

Original Hire: 02-FEB-2015

Adjusted Service: 01-FEB-2015

Seniority: 02-FEB-2015

First Work Date: 02-FEB-2015

Last Work Date:

Termination

Reason:

Termination Date:

Leave of Absence

Reason:

Begin Date:

End Date:

Hiring Location

Location:

College:

Campus:

Employee Class; press LIST for valid codes.

Record: 1/1 <OSC>

- PEAEMPL (Employee Form in Banner)
- Employee status, employee class, home department, current hire date
- Impacts performance program eligibility

Integrations: What Data Feeds PM?

Oracle Fusion Middleware Forms Services: Open > NBAPOSN

File Edit Options Block Item Record Query Tools Help

Position Definition NBAPOSN 8.7.1.5 (PBAN)

Position Number: 900514

Position Status: Active Type: Single

Position Begin Date: 01-APR-1999 Position End Date: COA: E

Compensation and Classification

| | | | |
|----------------------|-----------------------------------|--|------------|
| Position Class: | N0065 Director - Exec/Admin | Appointment Percent: | 100.00 |
| Position Title: | Director of HRIS | Budget Type: | Permanent |
| Employee Class: | E2 SAAO IB FT | <input checked="" type="checkbox"/> Exempt Indicator | |
| Job Progression: | | <input type="checkbox"/> Accrue Seniority | |
| Salary Group: | 2018 General EPA Salary Range | Range Low: | 1,000.00 |
| Salary Table: | EP | Range Midpoint: | 381,625.00 |
| Salary Grade: | RANGE | Range High: | 762,250.00 |
| Salary Step: | 0 | Step Value: | |
| Reports To: | 900527 Asst VC, Human Resources | | |
| Work Schedule: | | | |
| Probationary Period: | | | |
| Bargaining Unit: | | | |
| Job Location: | 220130 AFH HR Information Systems | | |

Position class; press LIST for valid codes.

Record: 1/1 <OSC>

- NBAPOSN (Position Form in Banner)
- Supervisory structure defined by the “Reports To:” field
- Impacts who has access to an employee’s performance appraisal

Integrations: What Data Feeds PM?

Oracle Fusion Middleware Forms Services: Open > NBAJOBS

File Edit Options Block Item Record Query Tools Help

Employee Jobs NBAJOBS 8.10 (PBAN)

ID: B01047138 Daniel Evan Blumberg Last Paid Date: 15-MAR-2018
Position: 900514 Suffix: 00 Query Date: 18-MAR-2018

Base Job Job Detail Payroll Default Deferred Pay Miscellaneous Excluded Deductions/Benefits Default Earnings Work Schedules Job Labor Distribution

Begin Date: 02-FEB-2018 End Date: Job Type: Primary

IPEDS Reporting Indicator

COA: E Accrue Leave Civil Service

Increase MM and DD: Eligible Date: Deferred Balance: 0.00

Salary Encumbrance
Total Encumbrance Hours: Current Fiscal Year: 98,977.00
Future Years: 0.00
Total Encumbrance: 98,977.00

Probationary Data
Probationary Period: Probationary Begin Date: Probationary End Date:

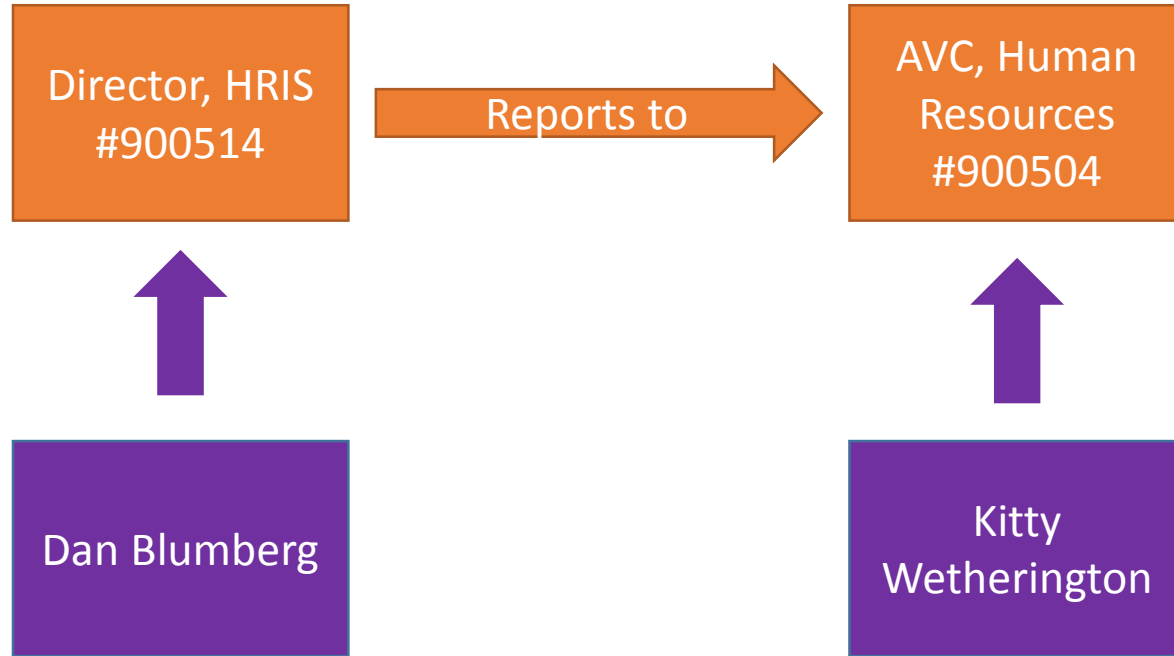
Contract Information
Start Date: End Date: Total Contract Hours:

Fringe Encumbrance
Current Fiscal Year: Future Years: Total Encumbrance: 0.00

Job Begin Date; format 'DD-MON-YYYY'.
Record: 1/1 <OSC>

- NBAJOBS (Jobs Form in Banner)
- Job begin dates, job effective dates, probationary period
- Impacts program eligibility, seats an employee in a position, part of how supervisor is assigned

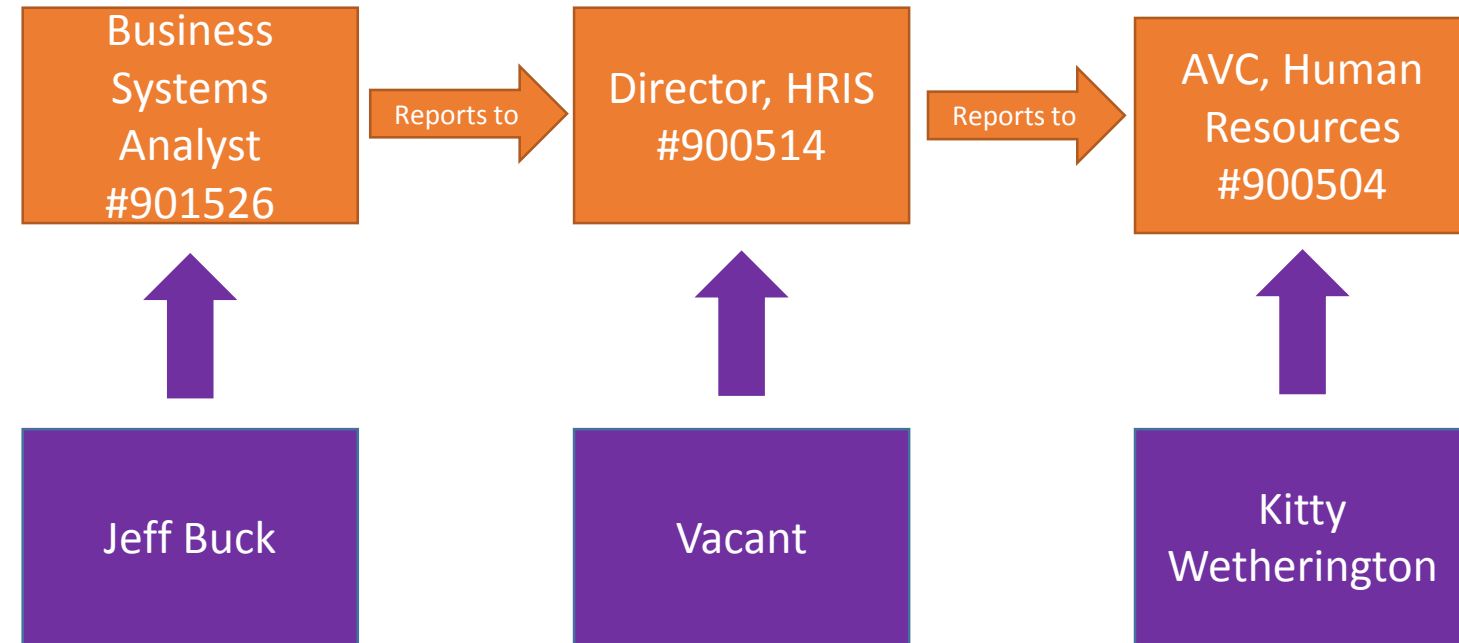
Supervisory Structure



Dan's supervisor is Kitty

- Inherited from an employee's position
- Defined on NBAPOSN, used by many systems, *not* the same as Reporting Structure in Pirate Port
- Issues likely mean bad Banner data
- Alert HR via TD ticket when changes are necessary

Supervisory Structure



Jeff's supervisor is Kitty because the vacancy is automatically accounted for

- Reduces the need for constant maintenance
- Vacancies are “leap frogged”
- Helps manage interim appointments
- 2nd Level Approver is the supervisor’s supervisor

Data Best Practices

- Remember that personnel actions (EPAFs) have the potential to change this data
- If you submit or approve EPAFs, think big picture; don't make changes in isolation
- Don't guess; if you're not sure, ask!
- Be proactive; if something looks off, don't procrastinate troubleshooting
- Dates matter!

How Do I Request Help?

The screenshot displays the ECU Technology Service Management System interface. At the top left is the ECU logo and the text 'TECHNOLOGY SERVICE MANAGEMENT SYSTEM'. To the right is a search bar with the placeholder text 'Search the client portal' and a magnifying glass icon, and a user profile icon for 'Dan Blumberg'. Below this is a navigation bar with links for 'Home', 'Projects/Workspaces', 'Services' (highlighted), 'Knowledge Base', and 'News'. A secondary navigation bar includes 'Project Requests', 'Ticket Requests', 'My Favorite', 'My Recent', 'My Approvals', 'Services A-Z', and 'Search'. The main content area shows a breadcrumb trail: 'Service Catalog / Other Campus Services / Human Resources / PeopleAdmin - Performance Management'. The title 'PeopleAdmin - Performance Management' is followed by a description: 'PeopleAdmin is ECU's talent management system. Users who require assistance with performance management, such as an annual evaluation or removing an employee from probation, should complete this form.' To the right of the description are three prominent purple buttons: 'Request Service' (with a location pin icon), 'Share' (with a share icon), and 'Add to Favorites' (with a star icon).

- Team Dynamix ticket specific to performance management
- Adding an employee to off-cycle review
- finding a previous employee or plan
- change to supervisor structure
- finding reviews for separated employees

Questions?