

# HR Configuration Management Process Improvement [UIC, UIUC, UIS, System Office]

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## Business Case

Currently an average of 950 hours are spent by HRIS staff each year implementing HR configuration changes in Banner. This represents a subset of the total hours, since many other organizations participate in the process in various ways. Configuration changes are generally requested by campus central HR units and vary significantly in complexity, lead time and risk of negative impact to enterprise systems. It is important that requests are handled in a timely manner and that the potential impact of changes is researched and understood before implementation. Improper or inaccurate configuration changes can negatively impact payroll, employee benefits, contracts and other HR-related processes or functions.

Through this project, the project sponsors hope to develop a more efficient process for managing HR configurations in Banner, while maintaining data integrity and minimizing negative downstream impacts. This new process would eliminate non-value added activities and/or roles and would be sustainable to staff turnover/re-assignment. Roles and responsibilities for each type of configuration change would be detailed and customers requesting the change would understand the process and expectations.

## Goal

Develop a more efficient process for managing HR configurations in Banner while minimizing risk of adverse changes to Banner and downstream systems (e.g., Nessie, UI New Hire, HR Front End, NOA, etc.).

## Approach

In Phase 1, HRIS staff, campus staff and AITS staff were interviewed to understand the current configuration processes and to document the opportunities for improvement. Once the opportunities for improvement were analyzed, 21 suggested improvements were identified.

During Phases 2 and 3, the project team documented 9 current configuration processes. In Phase 2, no recommendations or future state process maps were created as the current state process map documentation met HRIS' need. For Phase 3, proposed future state process maps were developed.

At the completion of Phase 3, all phases were reviewed to develop the 11 recommendations and create a transition action plan to assign owners to tasks and establish a timeline for those recommendations.

## Outcome

Identified 2 short-term, 5 mid-term and 4 long-term recommendations that will clearly delineate the roles and responsibilities of those involved as well as the information needed to successfully implement configuration changes into production. Implementing the recommendations will save all HRIS and campus staff time by outlining the steps for all parties involved and detailing what information needs to be provided.

## Key Findings

- **Delays** – There are tasks within the configuration processes that are often postponed or late.
- **Training** – Expertise is not distributed. There is a lack of overall process knowledge.
- **Process Role Ambiguity** – Configuration process steps that are in need of role definition.
- **Configuration Request Contents** – Configuration requests contain missing or incorrect information to process the request.

## Short-term Improvement Recommendations

1. **Create one easy to find configuration resource webpage.** *The webpage will contain common vernacular/dictionary and configuration checklists for clients to review before sending requests.*
2. **Evaluate existing request forms to ensure they are consistent and complete.** *Review forms being currently used by configuration processes.*

## Mid-term Improvement Recommendations

1. **Empower HRIS to refuse incomplete configuration requests.** *Some requests are made with incomplete information. In these cases, iterative emails are needed to assemble all the necessary information to implement the change.*
2. **Develop service level agreement specifying roles and lead times for configuration requests.** *Delineate the timeline for each type of configuration.*
3. **Analyze Banner security for campus configuration participants.** *Determine if they have appropriate View/Query access in Banner and knowledge of the Banner form to review configuration before and after the configuration is made.*
4. **Evaluate available software tools to meet the HR Config needs for the configuration request.** *Investigate using a workflow engine.*
5. **Investigate enhancements to existing tools.** *Research if manual processes can be done in an online form.*

## Long-term Improvement Recommendations

1. **Establish periodic meetings to share knowledge and provide targeted training.** *Provide cross-training with failover/redundancy of configuration process knowledge. Provide feedback to clients on their requests, solicit feedback on possible solutions and provide metrics of request turnaround times for each campus.*
2. **Create a Configuration Coordinator role on each campus.** *This person would have a basic knowledge of HR configurations, assist with follow up on requests and be a contact for campus representatives, etc.*
3. **Work with UIC to adopt a civil service anniversary increase process that will be sustainable going forward.** *Propose discontinuation of the current process and evaluating additional methods. This is a high-risk item as there is a lack of expertise on this process from all parties involved (Clients/HRIS/AITS).*
4. **Create future state processes that clearly delineate the roles and responsibilities of all parties involved.** *For nine configuration processes, shift some responsibility to the campus HR offices.*

## Implementation of Recommended Improvements

Short-term recommendations are currently being implemented with most activities scheduled for completion in April 2017. Implementation of mid-term recommendations are expected by November 2017 and long-term recommendations by January 2018.