<table>
<thead>
<tr>
<th>Today</th>
<th>Next Change Network Roundtable</th>
</tr>
</thead>
<tbody>
<tr>
<td>3:00-4:00 pm</td>
<td>Thursday, March 16, 2017 3:00-4:00 pm</td>
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<tr>
<td>Kissam Multi-Purpose Room, C210</td>
<td>Kissam Multi-Purpose Room, C210</td>
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</tbody>
</table>
• 3:00-3:05 – Welcome

• 3:05-3:10 – Project Updates

• 3:10-3:25 – Introduction to Receiving
  
  Tony Grayson

• 3:10-3:25 – Introduction to Hiring
  
  Stacy Hatten

• 3:25-3:40 – Introduction to Hiring

• 3:40-3:50 – Cloud 101
  
  Amanda Roberts

• 3:50-3:55 – Relationship with Change Agents
  
  Change Champions

• 3:55-4:00 – Questions & Wrap Up
Change Network Shout-Outs!

Natalie Richardson
Project Updates

Josh Vincent
**Project Updates**

**Prepping for Configuration Testing (CT) 2.1**

- Provides us an opportunity to test more data in the Oracle Cloud system

**Reporting**

- Configuring delivered tools and content to provide transactional and analytical reporting options for Oracle cloud areas

- Setting up Oracle BI tools to replace SAP Business Objects for non-Oracle cloud areas
Introduction to Receiving

Tony Grayson
Agenda

• Groundwork: High-level view of procurement
• What is receiving?
• For what is receiving required?
• Who does receiving?
• How do you receive?
• When do you receive?
Procurement: Big Picture

1. Department
   - Create Procurement Requisition
   - Receipt Acknowledgement

2. Central Procurement & Disbursements
   - Create Purchase Order
   - Invoice Entered
   - Payment Sent
   - Goods Delivered / Services Rendered

3. Supplier
   - Order Received
   - Invoice Transmitted
   - Payment Received
What is receiving?
2- and 3-way Matching

Matching Process performed for goods and services ordered by PO to safeguard Vanderbilt’s assets

- Match compares quantities, price per unit, terms, etc. on all documents to avoid paying incorrect or improper invoices.
- After a supplier’s invoice has been validated by the matching process, it can be further processed for payment.

2-way
- Invoice
- Purchase Order

3-way
2-way plus
- Receipt Acknowledgement
For what is receiving required?
PO Categories

- General
- Blanket
- Capital Equipment
- Lease
- Professional Services
- Service/Maintenance
- Subcontract
Receiving Summary

• Receiving is based on requisition type and is required on:
  – Capital Equipment
  – Professional Services
  – Services/Maintenance Contracts
  – Subcontracts

• Note: Receiving in these categories is irrespective of value: Cloud does not have $ thresholds
Who does receiving?
Who does receiving?

The *purchase requisition initiator* is responsible for completing the receipt acknowledgement.
Create Requisition
Standard Requisitions

Initiator: Any active employee
Approver: Financial Unit Manager
Second Approver: BU/Entity Approval Group
Third Approver: Vice Chancellor(s)

PO

$10K

> $1M
“On Behalf Of”

• A person may initiate a request on behalf of another.

• In such cases, receiving can be performed by either the “initiator” or the “requestor.”
How do you receive?
In Oracle Cloud

• Select **My Receipts** under Procurement on the main navigation menu.
When do you receive?
Timing & Best Practices

- Receipt acknowledgement is required to initiate payment to supplier
- When goods/services are actually received, the recipient can go into system and acknowledge receipt
- Expedites supplier payments upon being invoiced
Additional Notification

• The requisition initiator receives an email notifying them that the invoice was received and to take action (if not already done)

Note: These reminders will also prompt a user to review and receive incremental billing of professional services on a large PO.
Missed Receiving

- Notifications escalate in the system if receiving is not performed timely
Questions
Introduction to Hiring

Stacy Hatten
Hiring in SkyVU

Two main categories for hiring
Hiring: Types of Employee

- TALEO:
  - Staff
  - VTS

- NON-TALEO:
  - Faculty
  - Students
<table>
<thead>
<tr>
<th></th>
<th>TALEO</th>
<th>NON-TALEO</th>
</tr>
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<tbody>
<tr>
<td><strong>Hiring: Systems Used</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Staff VTS</td>
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<tr>
<td></td>
<td>Faculty Students</td>
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### Hiring: Systems Used

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<td>VTS</td>
<td></td>
<td>HCM*</td>
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*Pending Worker Record is available in HCM with data transmitted directly from Taleo*
*Pending Worker Record is available in HCM with data transmitted directly from Taleo
Hiring: Initiator

- **TALEO**
  - TALEO
  - Staff
  - VTS

- **NON-TALEO**
  - Faculty
  - Students

- **Taleo HCM***
  - Taleo
  - HCM

- **HR Specialist or Line Manager**
  - HR Specialist or Line Manager

*Pending Worker Record is available in HCM with data transmitted directly from Taleo*
Hiring: Initiator

- The candidate’s information will appear as a “Pending Worker” in Oracle Cloud’s HCM module.
- This will be converted to an active employee after labor distribution has been entered and the hire is approved by the HRIS team. This process is for new hires/re-hires/transfers.
- The ePAF and all variations leaves Vanderbilt.

*Pending Worker Record is available in HCM with data transmitted directly from Taleo
Hiring: Initiator

TALEO
- Staff VTS
- Taleo HCM*

NON-TALEO
- Faculty Students
- HCM

HR Specialist or Line Manager

HR Specialist or Line Manager
Hiring: Initiator

- Local users will perform direct entry of candidate data into the Oracle Cloud HCM system, creating a new, active employee record.
- The ePAF and all variations leaves Vanderbilt.
Reimplementation of Taleo

How Taleo is changing

- Streamlined, more aesthetic appearance
- New design and workflow for recruiters
- Strategy session built into the requisition
- Streamlined candidate workflow
- Online application updated to eliminate redundancies and unnecessary questions
Reimplementation of Taleo

Improvements from today’s process

- No need to enter labor distribution for regular positions
- Candidates will complete the new employee information form, W4 and emergency contact form during Onboarding
- Manager will be asked to verify start date and salary before the worker is converted to a new hire
- VTS employees will enter time into the Oracle timekeeping system and will be approved by the departmental manager
- VTS employee assignments will be entered into HCM by the HR VTS team and will include start/end dates, labor distribution and the HR line manager
Reimplementation of Taleo

Improvements from today’s interface

- Onboarding launched at the same time as the background check
- Candidate information sent directly to HCM to create “Pending Worker”
- Orientation scheduling will be launched from Onboarding
- Internal transfer information will be sent from Taleo to HCM, no more turnaround PAFs
- Improved launch page for Hiring Managers to include task pane
VTS: Timekeeping

- Paper forms for VTS employee timekeeping will be eliminated
- VTS employees will follow same time-entry methods as all Vanderbilt non-exempt employees

Change to current practice
Initiate and Post a Hire Requisition

Initiator

HR Line Manager
OR
HR Specialist

Approver

BU/Entity Approval Group

Talent Acquisition Manager

Hiring Manager will most often be a decentral user

Engages Candidate Selection “Workflow” which does not require approvals, but is a worklist of actions required
Complete Onboarding Tasks

Initiator

Recruiter
(Updates Onboarding Status)

Approver

Hiring Manager and Hiring Manager Assistant
(listed on req)

Approves validation form
Questions
Sneak Peek at Cloud 101 Video

Coming Feb. 20th!
Relationship with Change Agents

Change Champions
What are you doing to increase engagement with your Change Agents?

- **Change Champions**
  - wide influence
  - enable change
  - actively engaged

- **Business Partners**
  - process redesign
  - context
  - business needs

- **Communication**
  - MyVU
  - website
  - printed materials

- **Training**
  - online
  - job aides
  - in person support

- **Change Agents**
  - local influence
  - advocate change
  - direct feedback
ANOTHER SUCCESSFUL WEBINAR

WAY TO GO SKYVUNIT

memegenerator.net
## Next Steps

<table>
<thead>
<tr>
<th><strong>Connect with your Change Agents</strong></th>
<th>• Use strategies shared today to collaboratively inform your departments</th>
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</table>
| **Distribute Cloud 101 video** | • Distribute link to your teams on Feb. 20  
• Change Agents will be asked as well |
| **Town Hall** | • April 4, 3-4 p.m., SLC Ballroom  
• Please wear your Change Champion button! |

Mark your calendar!