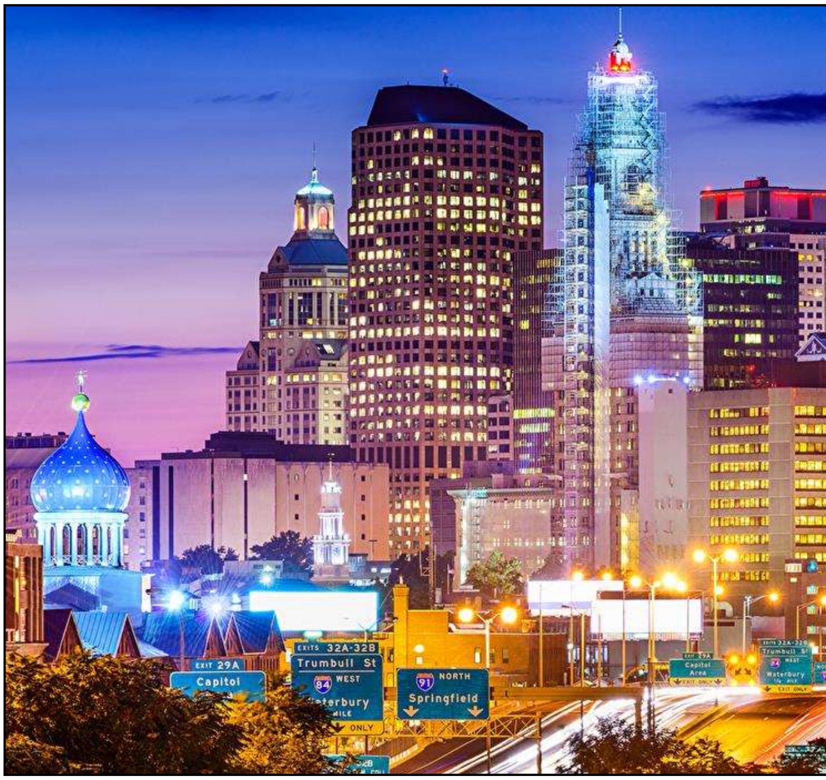



Core-CT

# Managing Job

Core-CT

October 2024



Welcome to the Managing Job Data Overview.

*Course Intro*

# Welcome to the Managing Job L200 Course

We will explore the enhancements introduced by the upgrade to PeopleSoft.

**Some guidelines for today's class:**

- Put cell phones on silent or vibrate
- Ask questions and remain engaged
- Course will provide overview of system upgrades and changes



In this course we will be covering the enhancements to PeopleSoft and how they affect managing Job.

Speaker Note: You were referred to this class as you all have the HR specialist role. This means that you are the ones who have the ability to create employees and add jobs as well as edit personal data.

We ask that during this course you:

Put cell phones on silent or vibrate

Ask questions and remain engaged during the presentation

## Trainer - Facilitator – Participant Roles

### Trainer

- Cover course content
- Speak to the functionality
- Answer any questions at the end of each section

### Facilitator

- Share the presentation: Training Material Location
- Manage time
- Direct questions from participants to the Trainer at the end of each section
- Share the course evaluation survey: Managing Job Data Course Survey

### Participants

- Ask questions in the chat throughout the training

**NOTE:**

** Unable to turn on camera*

** Unable to speak*

This webinar functions a bit differently than the Teams meetings you may be used to, so I'll briefly review the roles for today's training:

**As the Trainer, I will be:**

- Covering the course content, including discussing the new functionality

- As well as answering questions. We will have a parking lot for any questions we need to follow up on.

**We also have a separate Facilitator who is:**

- Sharing the presentation and managing time

- The facilitator will also direct questions from participants at the end of each section and share a survey when the course has completed.

**As the Participants, please:**

- Ask questions in the chat throughout the training

**NOTE:**

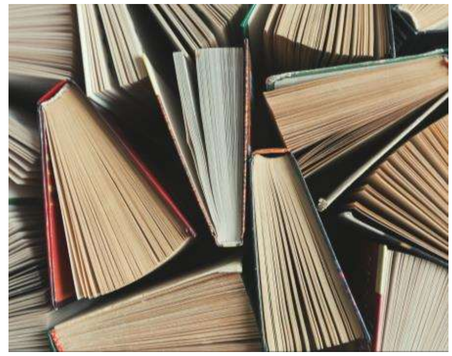
•*You will be unable to turn on camera*

•*Your microphones will be muted so please make sure to put your questions in the chat.*

## Learning Objectives

**At the end of this course, you will be able to:**

1. Manage Job Tiles
2. Maintain employee job information/data/status
3. Create a job data transaction
4. Handle Paid Leave of Absence





At the end of this course you will be able to use new fluid tiles for job as well as maintain employee information and create job data transactions.

*Course Intro*

## Course Overview and Objectives

**Users will understand how to navigate to the human resources tile to update and manage Core-CT's workforce.**

System changes resulting from the PUM upgrade include:

- New User Interface
- Managing Job Navigation
- Managing Job Fluid pages
- The HR processes to maintain employee jobs, status, and data
- Managing Job Activity Guide



The Overview and Objectives for today's training is to help get you familiar with the changes that will impact managing employee data.

Some of the changes due to the Upgrade consist of:

- A New User Interface
- New Navigation for Managing Job
- New Fluid Pages
- HR processes to maintain employee jobs
- Managing Job Activity Guides

## Today’s Schedule

| Section |
|---|
| Course Introduction |
| **Unit 1: Maintain Employee Job** |
| Q&A |
| Scenario 1: Changing an Employees' Status |
| Scenario 2: Handling Paid Leave of Absence |
| Review and Q&A |



Here’s a glimpse at the schedule for today’s training. It should take us about an Hour depending on the number of questions.

We will be covering new navigation, how to make updates to employee information including a walkthrough of changing an employee's status and placing on leave.

We will also have time for questions.

## Key Terminology

| Term | Definition |
|---|---|
| Fluid User Interface | Designed to be used on mobile devices but can also be used on a laptop and desktop. |
| Homepages | Homepages are collections of tiles that users tap to access transactions. |
| Guided Process | A series of actions or steps that users complete within a specific business process. |
| Tiles | A shortcut button that helps you quickly get to important tasks or information without searching through menus. |



Here is a list of terms that you may not be familiar with but you may hear throughout the duration of this training.

- **Fluid User Interface** : A new interface that adapts to different types of devises( smartphone, tablets, desktop, etc)
- **Homepages** : These are a collection of tiles that users click to access transactions. These serve as a personalized entry point for different types of tasks and activities.
- **Guided Process**: A series of actions or steps that users complete within a specific business process. Essentially, an activity guide helps to streamline complex tasks by breaking them down into manageable steps.
- **Tiles**: A shortcut button that helps you quickly get to important tasks or information without searching through menus.

# Unit 1: Maintain Employee Job

In this unit we will explore the process of maintaining employee job information in the updated Fluid interface.

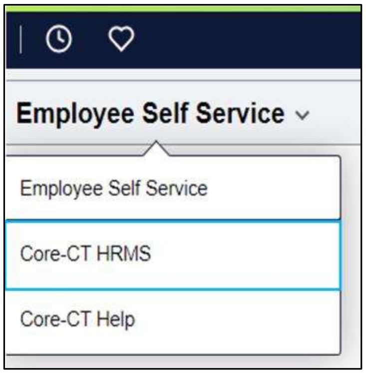
- Discuss Fluid navigation changes
- Changing an employee's status
- Selecting job action reasons
- Utilizing the Managing Job Activity Guide



- Here we will explore the process of viewing and maintaining employee information. It's important to mention that the business process has not changed but the navigation has been updated. We'll review the new fluid tiles that will be used to maintain employee data. We will also review the new functionality of Activity Guides.

## Manage Job Navigation

**Navigation**: *Core-CT HRMS > Workforce Administrator> Manage Human Resources >* ***Manage Job***







Here is the new navigation for Manage Job

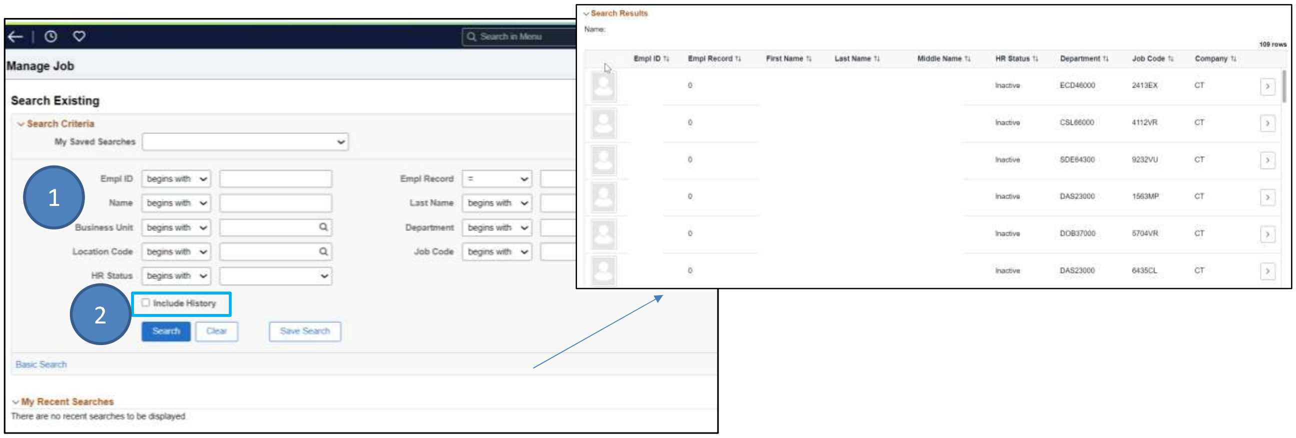
When logging in, you most likely will default to the Employee Self Service homepage. From there you'll click the dropdown arrow and select Core-CT HRMS.

Once on the Core-CT HRMS home page, you will select the tiles for Workforce Administrator, Manage Human Resources, then finally Manage Job

# Search Existing Job

The Manage Job tile will navigate to the **Search Existing** page

1. Search by populating the Empl ID, Name, Business Unit, etc. to find a job
2. Select the **Include History** checkbox to view All History. Click **Search** when the search criteria is filled out, then select the employee to view

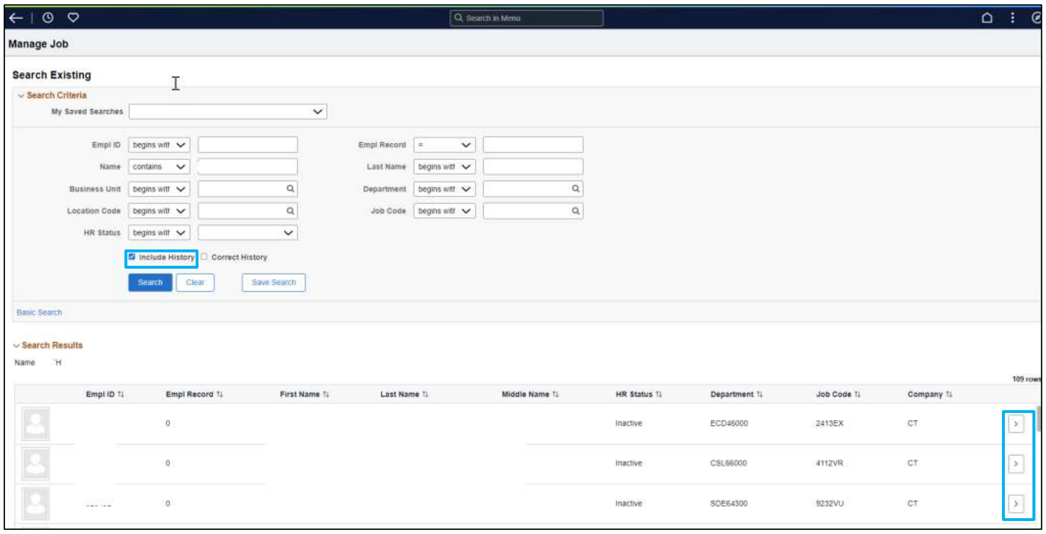





Upon selecting the Manage Job tile, you will be brought to the employee search page. The search page contains the same fields you have today with a few additional ones added. You can now include Location, Department, Job Code and HR Status as part of your search criteria. These additional fields can be helpful in narrowing your search results, such as returning only active employees.

## Search Results – Include History

Ensure the **Include History** checkbox is selected prior to selecting employee. Use the scroll bar to navigate through the results before selecting the desired employee.

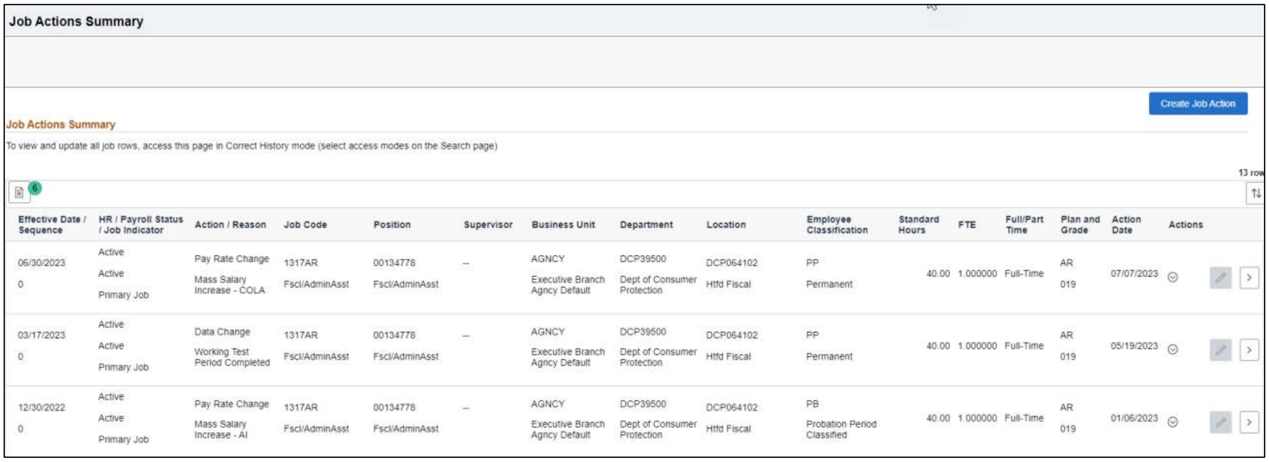





The search results will appear at the bottom of the page listing all employee who meet the criteria. If there are multiple results, there is a scroll bar on the right to review the entire list. If needed, it is important to verify that the Include History button is checked prior to selecting the employee. If you determine history is needed after selecting the employee, you will need to return to this page to check the box. Click on the arrow to the right of the employee you are searching for which will bring you to the Job Actions Summary Page.

## Job Action Summary Page

After selecting an employee, the page will redirect to the Job Actions Summary page. This page displays the history of all performed actions and notes associated with the employee.


**Job Actions Summary**

Create Job Action

**Job Actions Summary**

To view and update all job rows, access this page in Correct History mode (select access modes on the Search page)

13 row

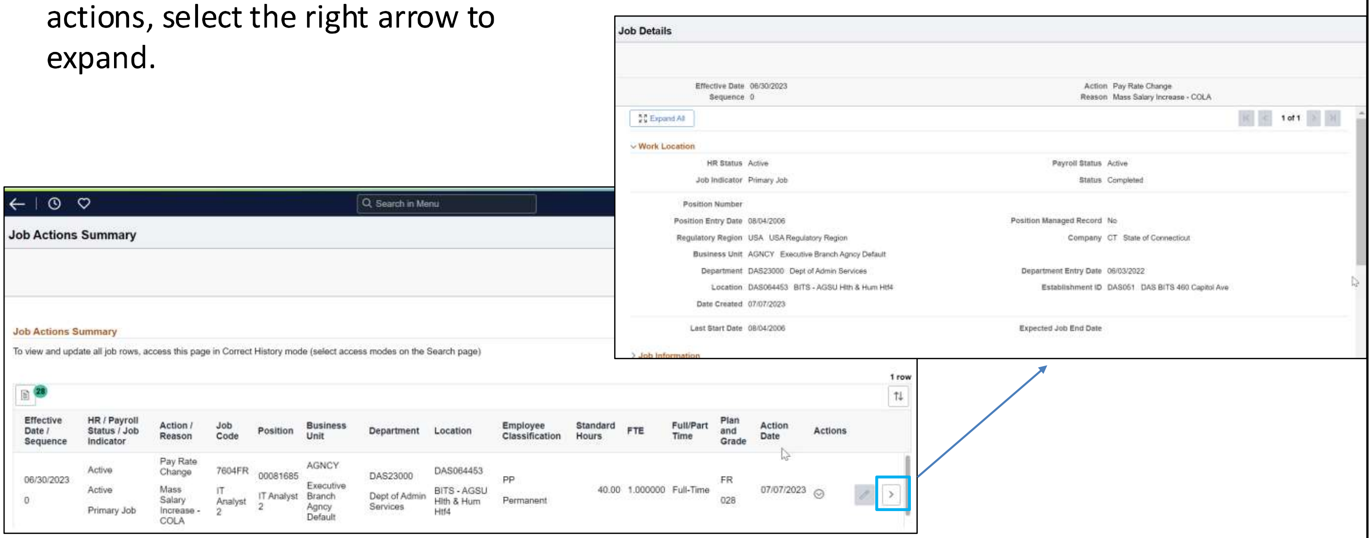
| Effective Date / Sequence | HR / Payroll Status / Job Indicator | Action / Reason | Job Code | Position | Supervisor | Business Unit | Department | Location | Employee Classification | Standard Hours | FTE | Full/Part Time | Plan and Grade | Action Date | Actions |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 06/30/2023<br>0 | Active<br>Active<br>Primary Job | Pay Rate Change<br>Mass Salary Increase - COLA | 1317AR<br>Fscl/AdminAsst | 00134778<br>Fscl/AdminAsst | -- | AGNCY<br>Executive Branch Agncy Default | DCP39500<br>Dept of Consumer Protection | DCP064102<br>Htfd Fiscal | PP<br>Permanent | 40.00 | 1.000000 | Full-Time | AR<br>019 | 07/07/2023 | |
| 03/17/2023<br>0 | Active<br>Active<br>Primary Job | Data Change<br>Working Test Period Completed | 1317AR<br>Fscl/AdminAsst | 00134778<br>Fscl/AdminAsst | -- | AGNCY<br>Executive Branch Agncy Default | DCP39500<br>Dept of Consumer Protection | DCP064102<br>Htfd Fiscal | PP<br>Permanent | 40.00 | 1.000000 | Full-Time | AR<br>019 | 05/19/2023 | |
| 12/30/2022<br>0 | Active<br>Active<br>Primary Job | Pay Rate Change<br>Mass Salary Increase - AI | 1317AR<br>Fscl/AdminAsst | 00134778<br>Fscl/AdminAsst | -- | AGNCY<br>Executive Branch Agncy Default | DCP39500<br>Dept of Consumer Protection | DCP064102<br>Htfd Fiscal | PB<br>Probation Period Classified | 40.00 | 1.000000 | Full-Time | AR<br>019 | 01/06/2023 | |



Once you have selected the employee, the Job Actions Summary page will appear. This page will give you a quick snapshot of the employee's job information. From here you can quickly view information for each job row such as Action/Reasons, Position Numbers, Salary plan etc. If you had clicked include history on the previous page, you see the historical rows as well. This is a new feature and is extremely helpful. It allows for a quick review of the employee's record without having to scroll between rows.

## Job Actions Summary

To view information for existing job actions, select the right arrow to expand.

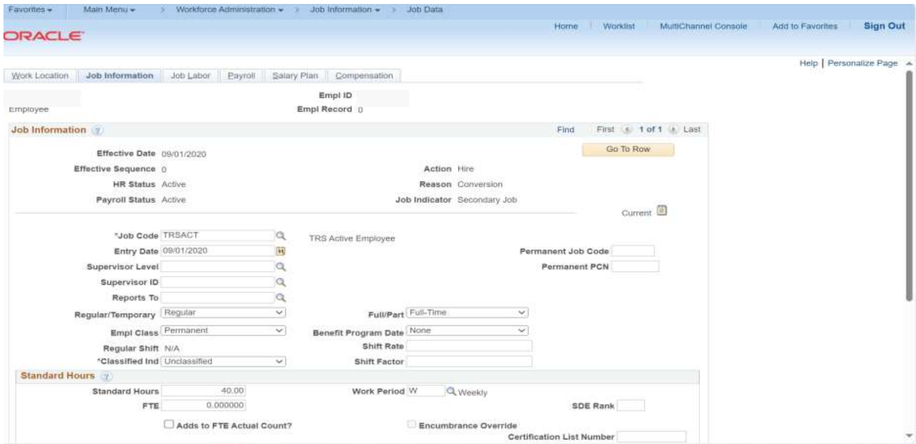





There are multiple actions that can be taken on this summary page. This screenshot reflects the new way to view an employee record. Once you have determined the row of employee data you would like to review, click the arrow on the right of the page. This will open the Job Details page for that specific row. While reviewing the record, you will have the ability move between existing rows using the previous and next arrows.

## Job Details Page – Classic View

Previously, we were able to see job data, separated into tabs at the top of the page. In the current updates, these pages are still there but are presented differently.

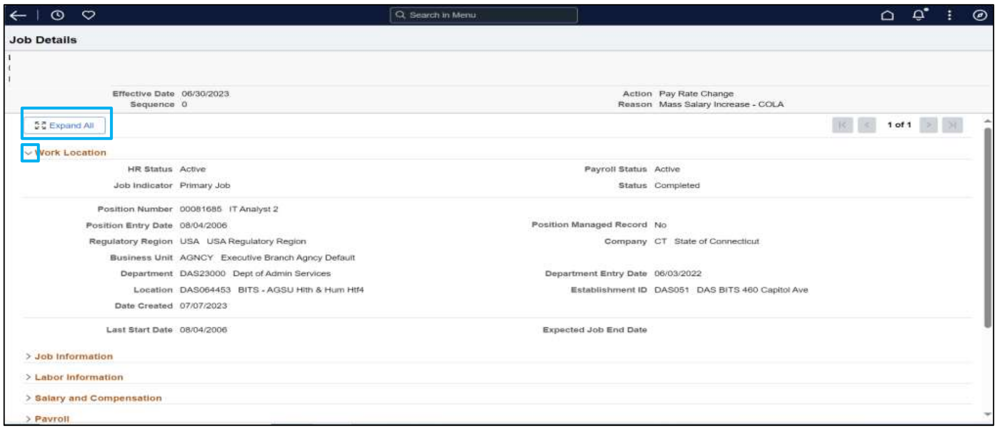





Here is an example of how Job Data looks today. This is what we refer to as classic. There are separate tabs that go across the top of the page and there are also some links that open additional pages. With the upgrade, these same pages are still there but are presented differently.

## Job Details Page – Updated View

You can select a job from the search page to view job details. The tabs are now displayed headers. You have the option to alter your view by selecting expand all, or by clicking the dropdown arrow next to each header.



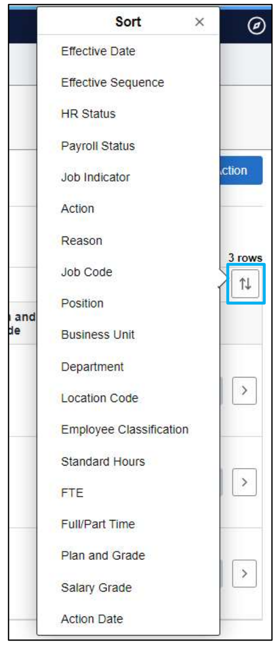



When you select a job from the search page, you open to Job Details. As I mentioned, you still have the same fields that are available today, but the information is now located on one page separated by headers. You have the option to alter your view by selecting expand all, or by clicking the dropdown arrow next to each header.

## Sort Job Actions

The user can sort through the list of job fields by navigating to the top right corner of the screen and selecting the Sort Icon.

Select the field in which you would like to sort by.






Going back to the summary page, just above the search results, is a sort icon. When you click this icon you can see the criteria that can be used to sort the employee's job rows. All the fields located on the sort menu are visible on the summary page. As you can see from the number of fields, in many cases the details displayed on this page may give you the information you need without having to open the record and navigate through multiple rows to capture history. As an example, if you want to determine the date an employee was promoted, you get that information by scanning rows right from the summary page.

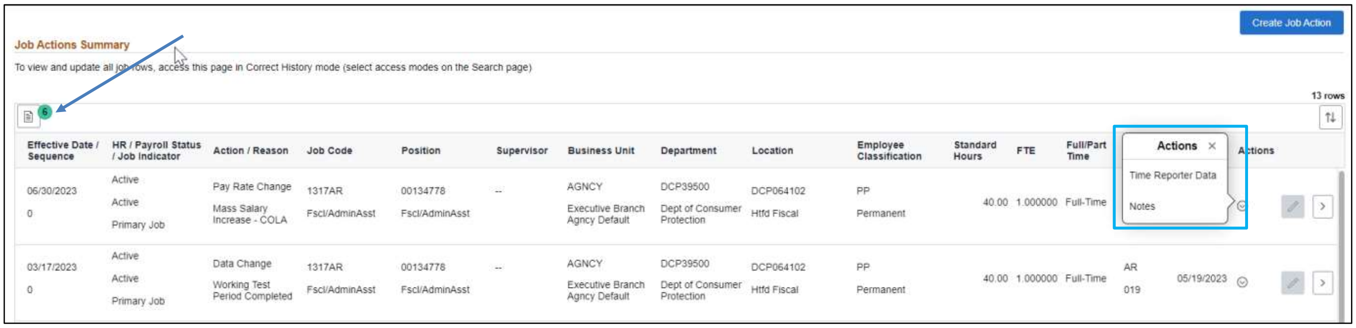
# Notes

To view the notes associated with the employees:

1. Click the **Actions** dropdown
2. Click **Notes**

**OR**

Select the **notes icon** displayed above the job action summary table.

Also on the summary page are Notes. They are no longer located in the Job Detail pages. They are available in two separate areas now. On the right side of the page, for each individual entry, the notepad is located under the Actions drop down icon highlighted in blue. On the left of the screen, there is a notepad icon on the top of the search results. You will notice there is a green circle with a number six in it. This reflects the number of notes that have been entered for the entire job record. You can click on this icon and you will see all notes entered for this employee record in one area.

## Create Job Action Button

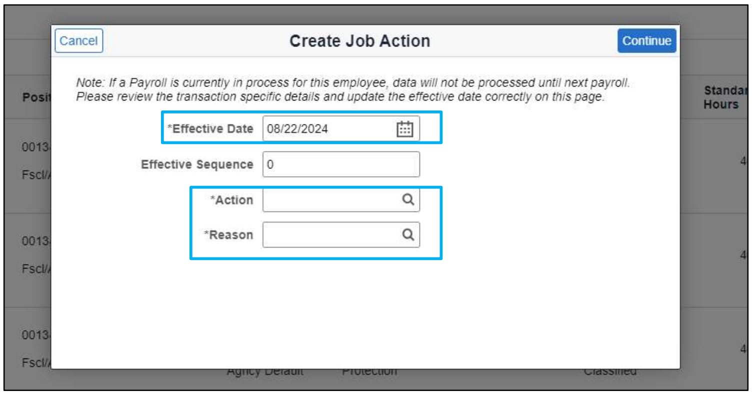
1. To create a new job action for an employee, click the **Create a Job Action** button on the top right corner of the Job Action Summary page.




The Job Actions Summary page is also where you would start a new transaction. To add a new row in job, click on the blue Create Job Action button on the top right of the screen.

## Maintain Job Activity Guide Overview

Once selecting the **Create Job Action** button, the corresponding popup displays. Please note, once the **Effective Date, Action** or **Reason** is entered, it can **not** be changed after you click **Continue** to begin the Activity Guide.



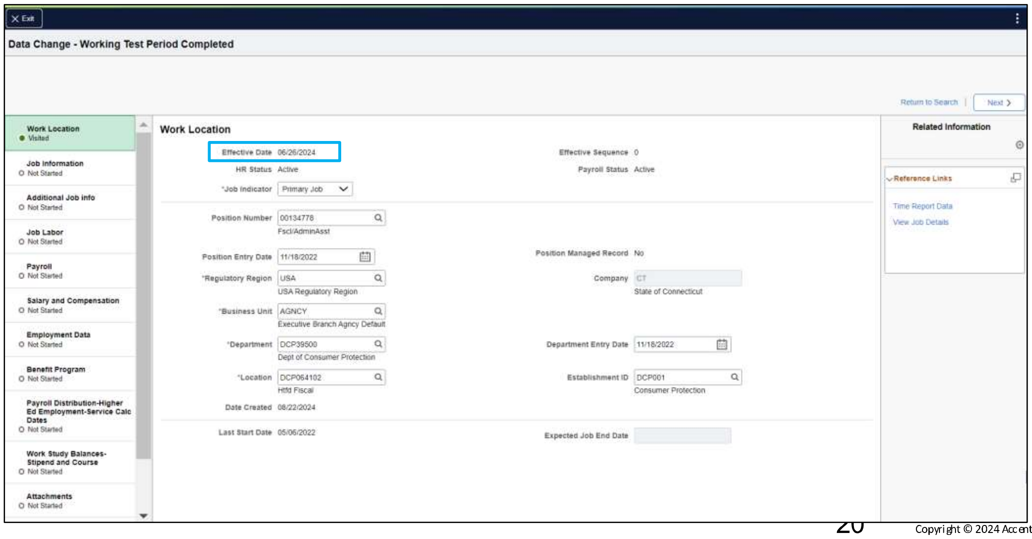




Once you click the Create Job Action button, a window will pop up for you to enter the effective date and action/reason. The Effective Sequence will default to the appropriate new sequence number if there is an existing row for that same effective date. One big change is that once enter the information and click continue, you will no longer be able to change the effective date or action/reason from the values entered on this page.

## Maintain Job Activity Guide Overview

After creating a job action, the page will redirect to the Activity Guide where users will update key components such as **Work Location, Payroll, Job Labor**, etc. The **Effective Date** can be found at the top of each page within the Activity Guide.







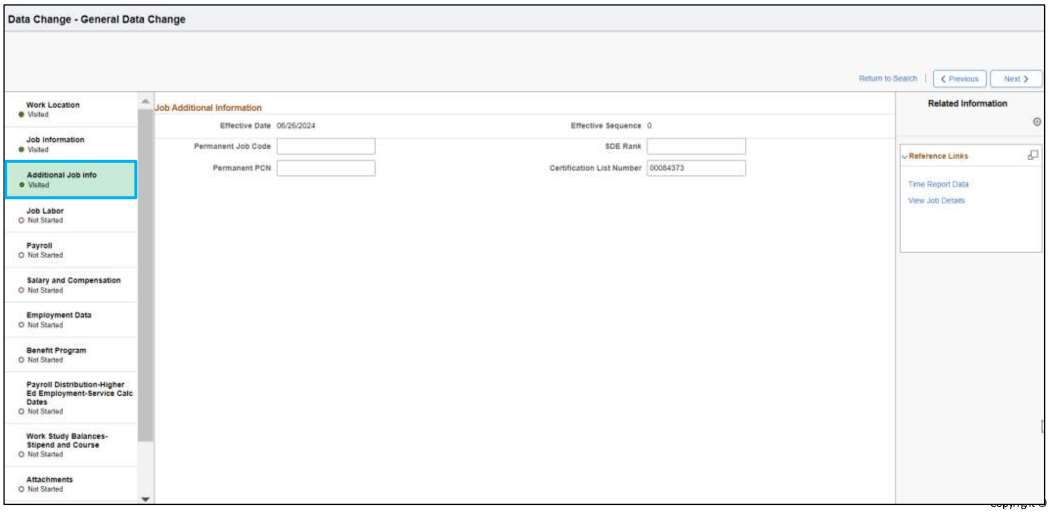

Upon clicking Continue, you will be brought to the Managing Job Activity Guide which is only available when entering a new transaction. Notice the action/reason is at the top of the page and both this and the effective date are view only. The steps on the left side mimic the tabs that are currently across the top in job. In the screenshot provided, you may see steps for sections you currently don't have access to in Core. These steps are based on security and you will still only see sections you see today with the addition of a few we will discuss in upcoming slides. The Guide is meant to ensure all steps have been completed when making updates. There will be indicator on each step that displays whether the step has been visited, not started or completed.

Before I go on to the next slide, take note of the Related Information section on the right of the page. We will be reviewing that in a future slide but wanted to point out the placement on the page before we move foward.

# Additional Job Info

The **Additional Job Info** page is a new addition to the process. This page includes fields that are currently in Classic job:

- **Permanent Job Code**
- **Permanent PCN**
- **SDE Rank**
- **Certification List Number**

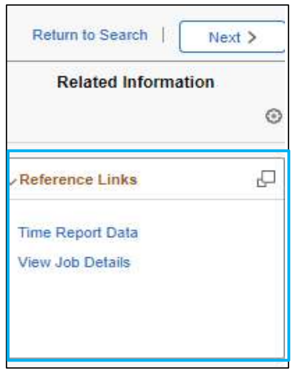





One of those new steps is called Additional Job Info. This page includes fields that were not delivered and were created unique to Core CT. These fields include Permanent Job Code and Permanent PCN which are used during a Temporary Service in a Higher Class. The SDE Rank and Certification List Number fields have also moved to this page.

## Reference Links

Clicking the **View Job Details** will open another tab to view job history. The **Time Reporter Data** link is now accessible via the Reference Links.

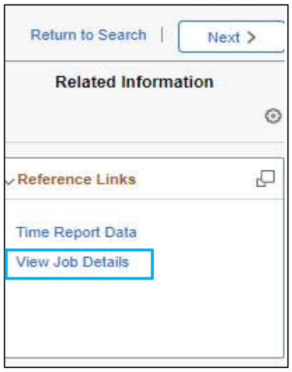


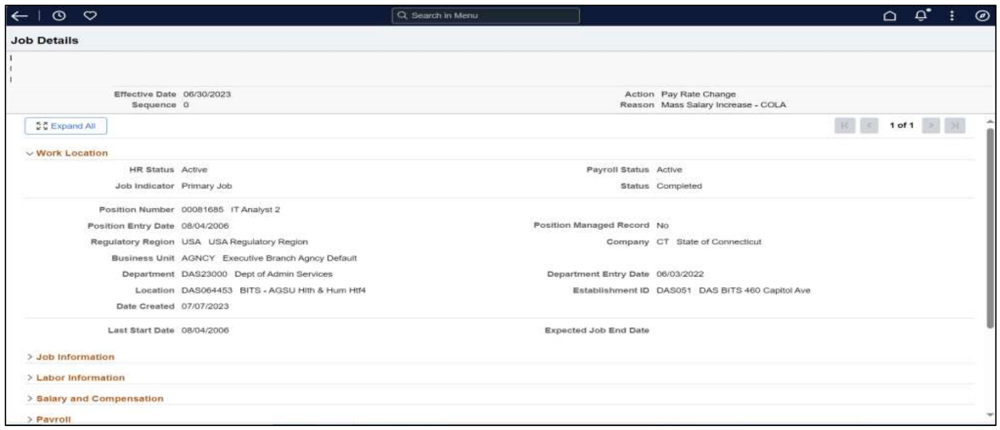



As I mentioned a few slides ago, the Related Information box is located on the right hand side of the page. Time Reporter Data is no longer on the Employment Data link and will be located in this section. There is also a link to View Job Details. Both of these pages will open in a new separate window.

## Job Details Page - Alternate Navigation

Notice that upon clicking the view job details link from the reference links section, we are taken to the job details page. This is a nice, quick way to review the employee record.



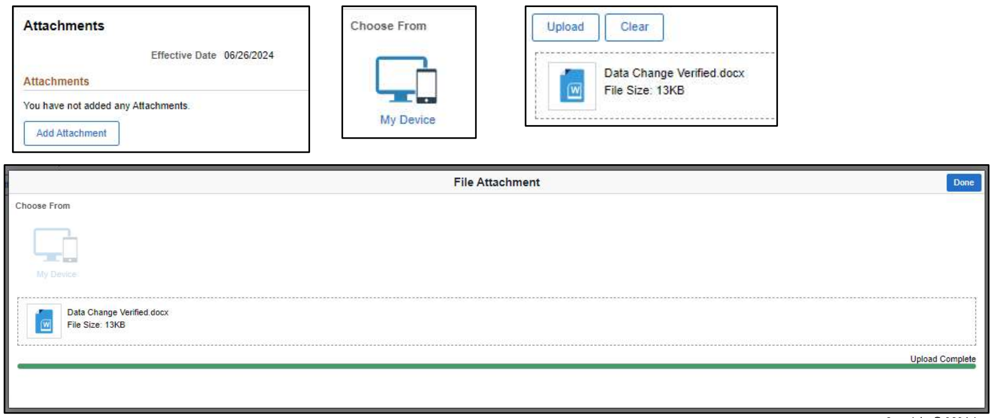



Here is an example of how the page looks when you click on View Job Details. The Job Details page is displayed and it's the same page we reviewed earlier. Since the page opens in a separate window, it allows you to review existing information while you are still in the process of creating the new transaction. If you have include history checked, you will be able to go between all the existing rows in the Job Details.

# Attachments

You can now add **Attachments** to each Action.


- Click **Add Attachments**
- Click **My Device**
- After selecting the document to upload, click **Upload**
- Click **Done**

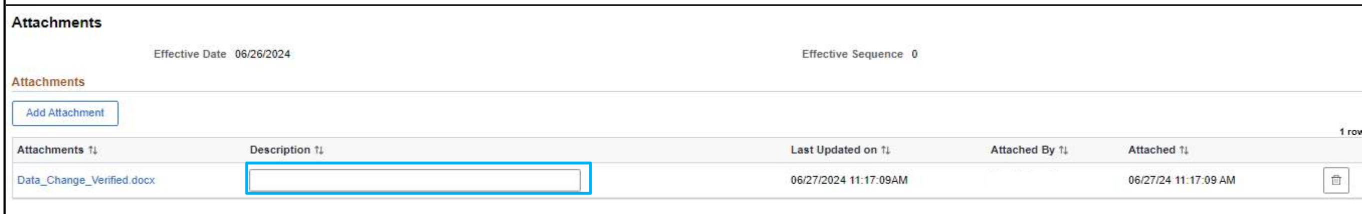





The ability to add attachments is a brand new feature and is a very intuitive way to add an attachment to a job record. From the Attachment step of the Activity Guide, click the Add Attachment button and then click on My Device. From here you will select the necessary file, click the Upload button and finally the blue done button.

# Attachments

Add comments into the Description field if needed.




Click the **Delete** icon if Attachment needs to be deleted.




Once the file has been uploaded, you have the option to add a description. In addition, if you have uploaded a file in error, there is a delete button to remove it. As I stated earlier this is a new feature and there will be more guidance coming regarding adding attachments to Job.

## Questions

- Post questions within the chat



If there are any questions on what we have covered so far please post them in the chat.

# Scenario 1: Update Employee Information

Core-CT

In this scenario, you'll be shown a walkthrough on how to change employee information

What we will accomplish:

- Create Job Action
- Utilize the Manage Job Activity Guide
- Familiarize yourself with the Fluid functionality



Now that we have completed reviewing the new functionality, I will be showing a walkthrough on how to update employee data.

We'll go over:

Creating job actions

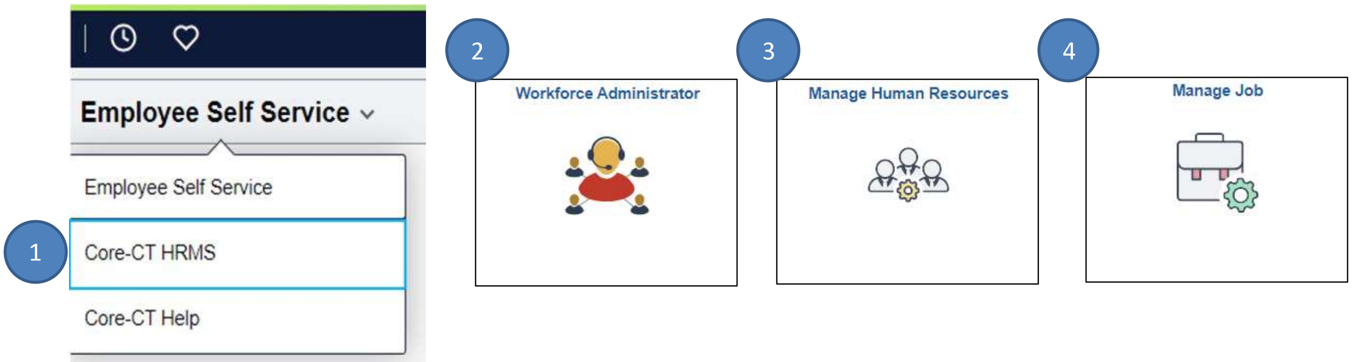
- Utilizing the Activity Guide
- And getting more familiar with the new fluid functionality.

Core-CT

## Navigation

To Maintain Employee Job

1. Navigate to **Core-CT HRMS**.
2. Select **Workforce Administrator**.
3. Click **Manage Human Resources**.
4. Click **Manage Job**.






To start the transaction, we will navigate to Core-CT HRMS homepage, Select the Workforce Administrator, Manage Human Resources and then Manage Job tiles.

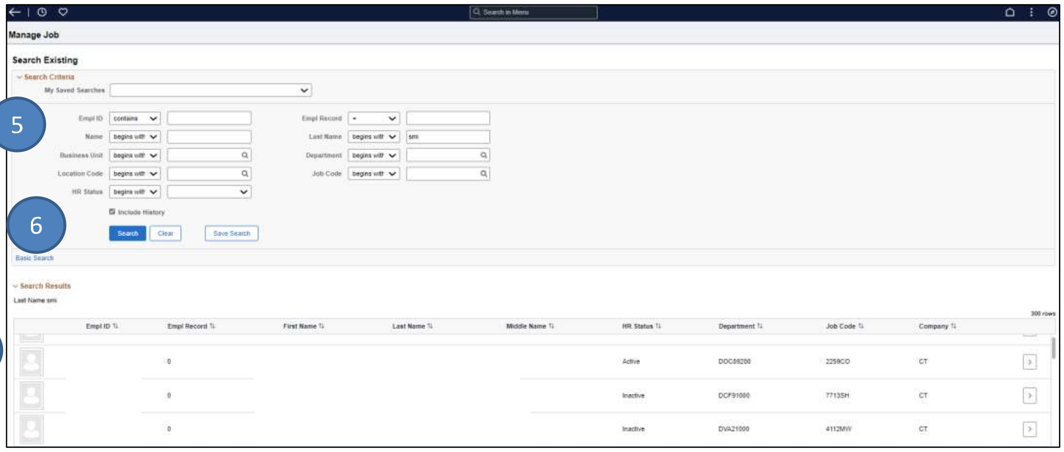
## Search Existing Employee

5. Use the Search functionality to look up an employee.
6. Click the **Include History** checkbox to include the employee's history record.
7. Search and select the details of an employee's job.

5

6

7




29



This brings us to the search page. If you know the EmplID you can enter it here or use the different search fields. Click on the appropriate employee which will bring you to the Job Actions Summary page.

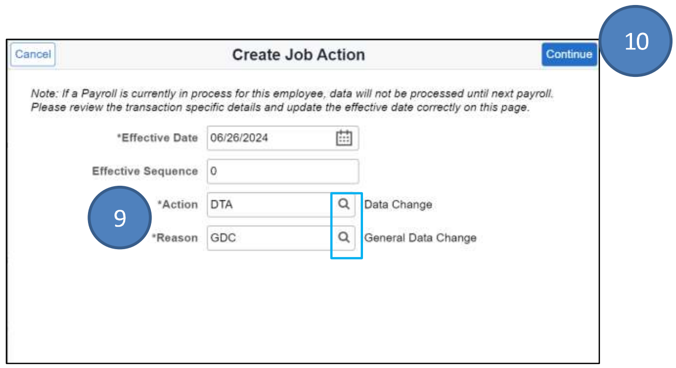
# Create a Job Action

On the **Job Action Summary** page, the user can update the employee’s job.

8. Click **Create a Job Action**.
9. Select the Magnifying Glass under ***Action** and ***Reason** and search for the job action code that best describes the required change.

*Note: the effective date will automatically populate to the current date; be sure to change the date as needed before proceeding.*

10. Select **Continue**.

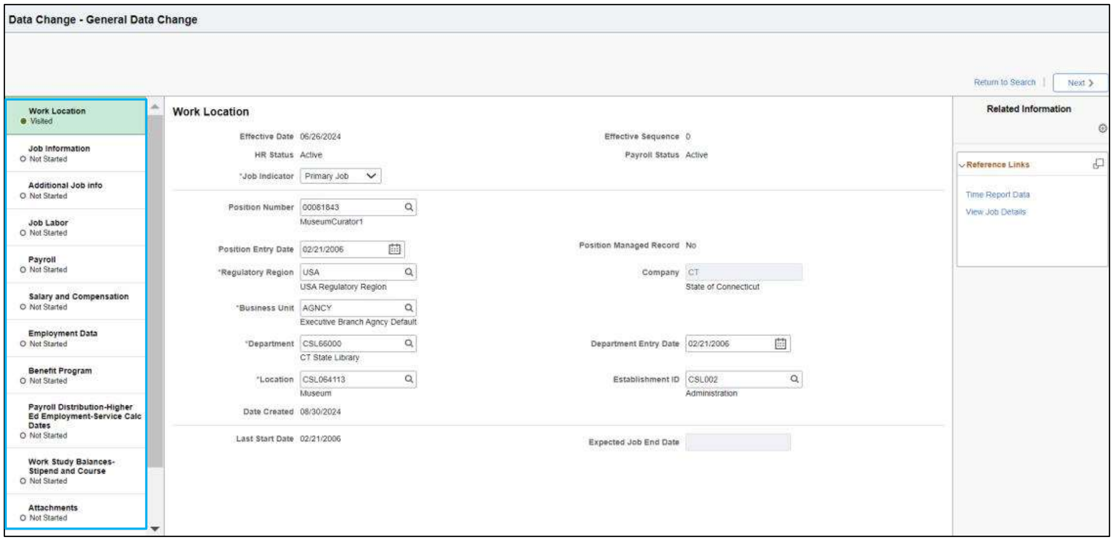



Once on the Job Actions Summary page, click on Create Job Action as indicated by the number 8. The effective date defaults to the current date so pay careful attention to update to the appropriate date. If you know the Action/Reason you can enter it or use the magnifying glass for assistance. There is an Action/Reason job aid on the Core CT website that lists the Action/Reasons and their corresponding three letter acronyms. In this scenario we are selecting DTA/GDC as we will be updating the REG/TEMP indicator and employee class.

*Scenario 1: Changing an Employee's Status*

## Create a Job Action

Next, use the Activity Guide to update the information necessary for the created job action.



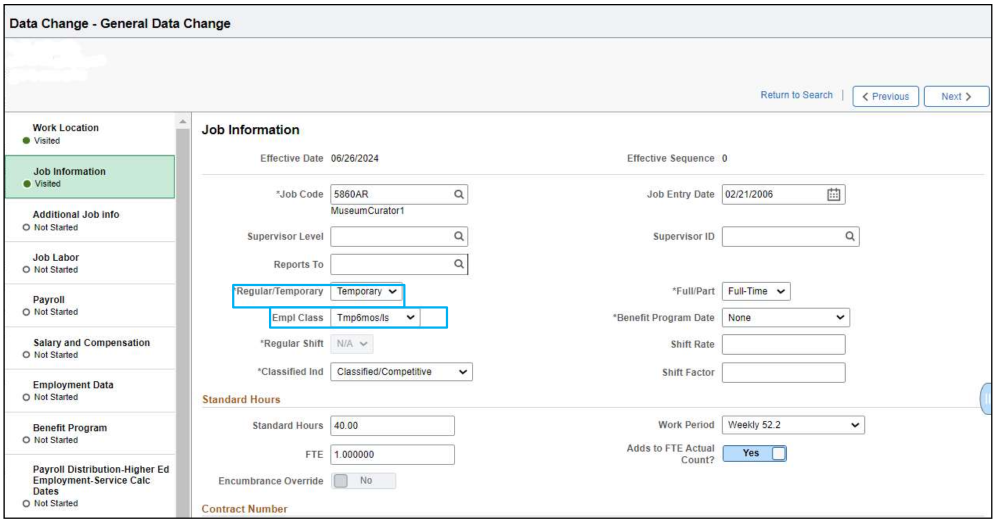



The Activity Guide will open. Since we will not be making any updates to the information on the Work Location page, we can go straight to the Job Information page by clicking that step in the Activity Guide.

*Scenario 1: Changing an Employee's Status*

# Job Information

On the **Job Information** page, the **Regular/Temporary** and **Employee Class** fields have been updated.



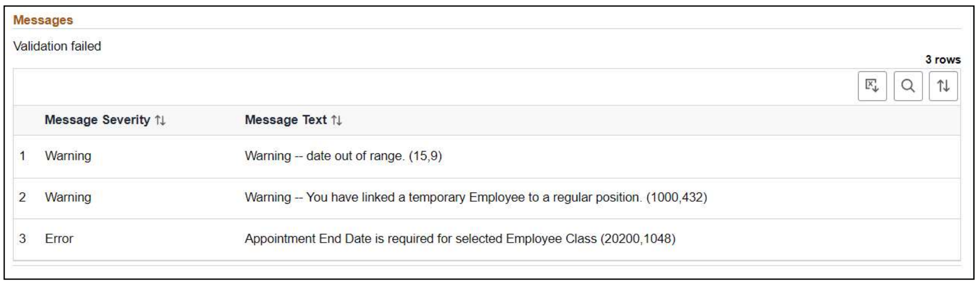



For this scenario, the Reg/Temp indicator has been changed to Temporary and the Employee Class has been changed to Temporary 6 Months or less.

# Validate

11. Click **Validate.**


The system runs a validation process on each tab and displays all error and warning messages found.



Messages

Validation failed

3 rows

| | Message Severity | Message Text |
|---|---|---|
| 1 | Warning | Warning -- date out of range. (15,9) |
| 2 | Warning | Warning -- You have linked a temporary Employee to a regular position. (1000,432) |
| 3 | Error | Appointment End Date is required for selected Employee Class (20200,1048) |

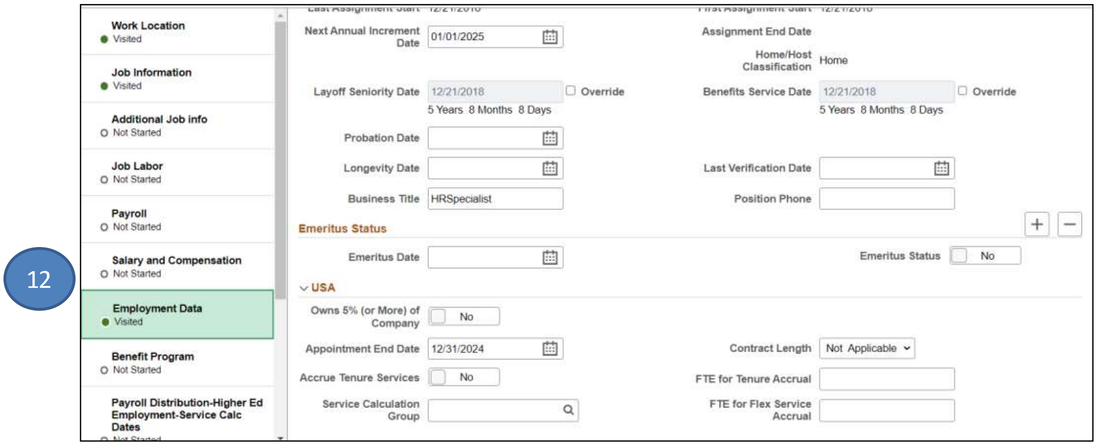


Another new tab with the Activity Guide is the Validate tab. Once all the information has been updated, navigate to the validate tab and click the validate button whichis marked with number 11. The validation process will run and display any error or warning messages. These are the same messages that you receive when you save a transaction today.

In this example, there is a warning that a temporary employee is linked to a regular position. Warnings appear for your review and update if necessary. They will not stop the transaction from being saved if the information is correct. If you receive an error, the system will not allow you to save the transaction and the record will need to be corrected. In this example, we received the error message that the Appt End Date is required for the Employee Class selected.

## Validate

12. Go back to the **Employment Data** page to correct the error, adding the **Appointment End Date**.

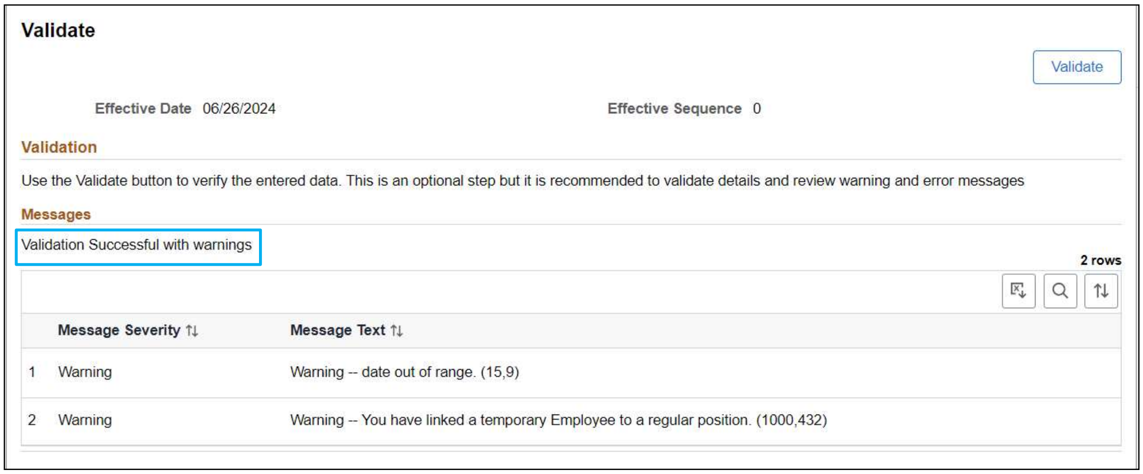





Using the Activity Guide, you can go directly to the field you need to update by clicking on the appropriate tab. Here we clicked on Employment Data tab and inserted the Appoint End Date in order to resolve the error.

## Validate

Select the **Validate** button; the Messages box now shows as *Validation Successful*. The transaction can be saved if warning messages are appropriate.

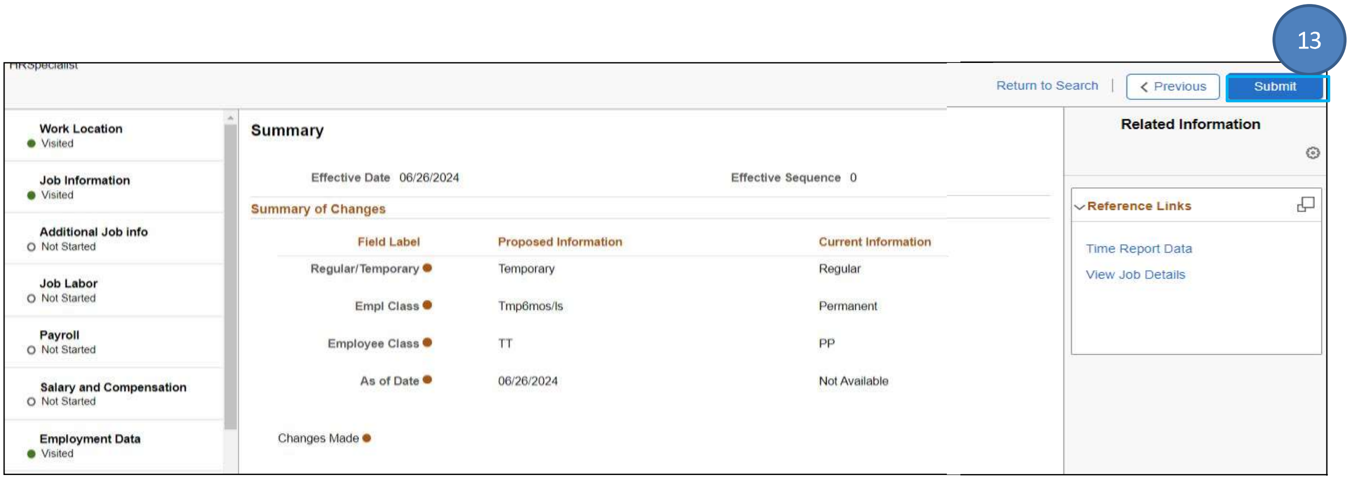





After correcting the error to the Employee Class, go back to the validate tab and click the validate button again. You will see that the error message no longer appears. The warnings message still appear but can be bypassed if the information is correct. Under Messages, you will see that the validation was successful.

## Summary

13. Once all information and changes have been updated, click **Submit**.



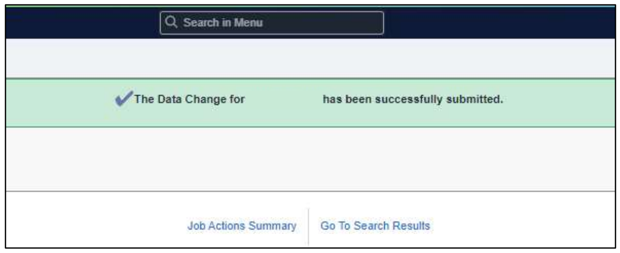





Once you confirm the warnings have been reviewed and are correct, you will click the Sumit button as indicated by number 13.

## Submission Confirmation

The page will then redirect to the **Submit Confirmation** page.






A green banner will appear to confirm that the transaction saved. There are two links on the bottom of the confirmation page allowing you to either return to search or go back to the Job Actions Summary page.

# Scenario 2: Paid Leave of Absence

In this scenario, you'll be shown how to place an employee on Paid Leave of Absence

What we will accomplish:

- Complete a transaction to place employee on Paid Leave of Absence

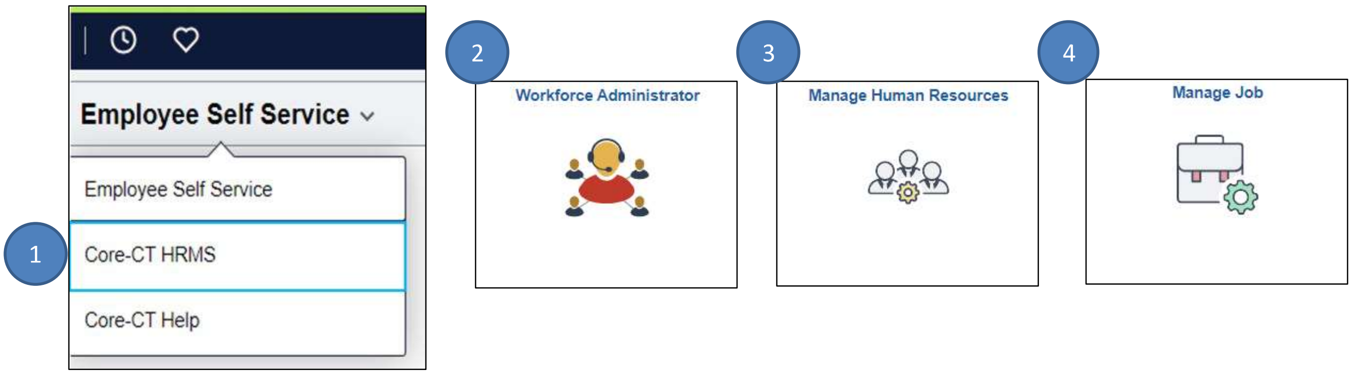


In this last scenario I will be walking though placing an employee on a Leave of Absence.

# Navigation

Maintain Employee Job Data and Information

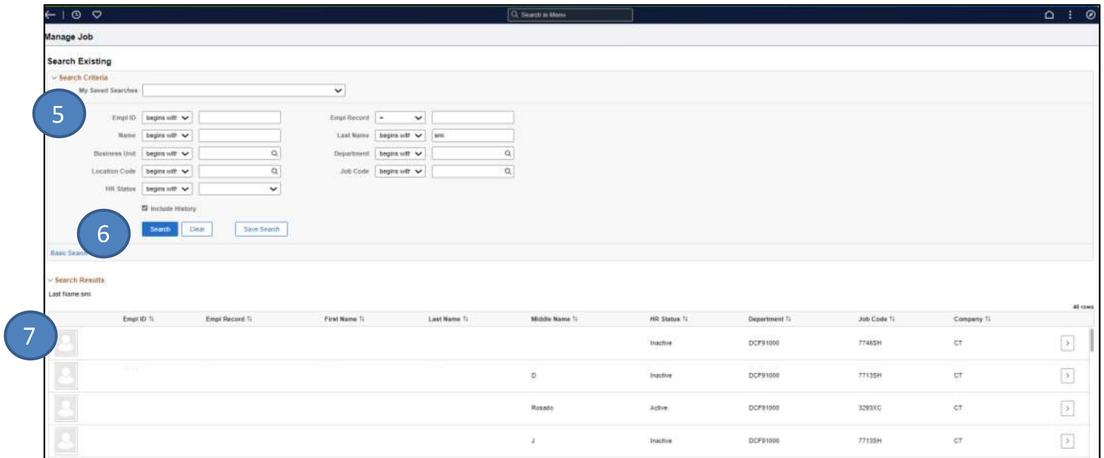
1. Navigate to **Core-CT HRMS**.
2. Select **Workforce Administrator**.
3. Click **Manage Human Resources**.
4. Click **Manage Job**.



*Scenario 2: Paid Leave of Absence*

## Search Existing

5. Use the Search Criteria to look up an employee.
6. Click **Search**.
7. Select an employee.




40



The page will appear to search for your employee. Another nice feature that I didn't mention earlier is that when you get to this page, the search results will contain the information for the previous five employees you searched for. If you recently searched for this employee, they will appear in the search results when the page is opens

Core-CT

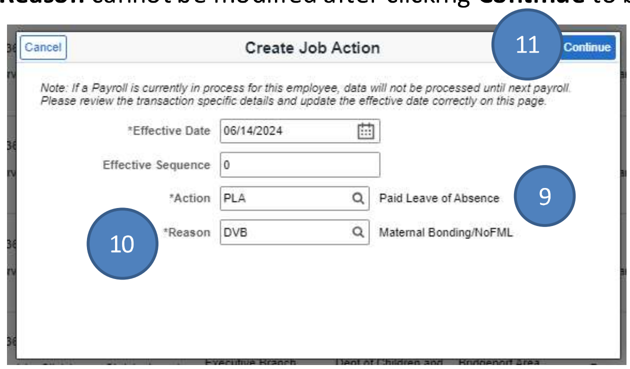
## Create a Job Action

8. Click **Create a Job Action**

*Note: the Effective Date automatically populates the current date; be sure to change this to the correct date as needed before proceeding.*

9. Use the Search Tool to select an **Action** as *PLA*
10. Use the Search Tool to select a **Reason** as *DVB*
11. Select **Continue**

Reminder: The **Effective Date, Action** and **Reason** cannot be modified after clicking **Continue** to begin the Activity Guide.

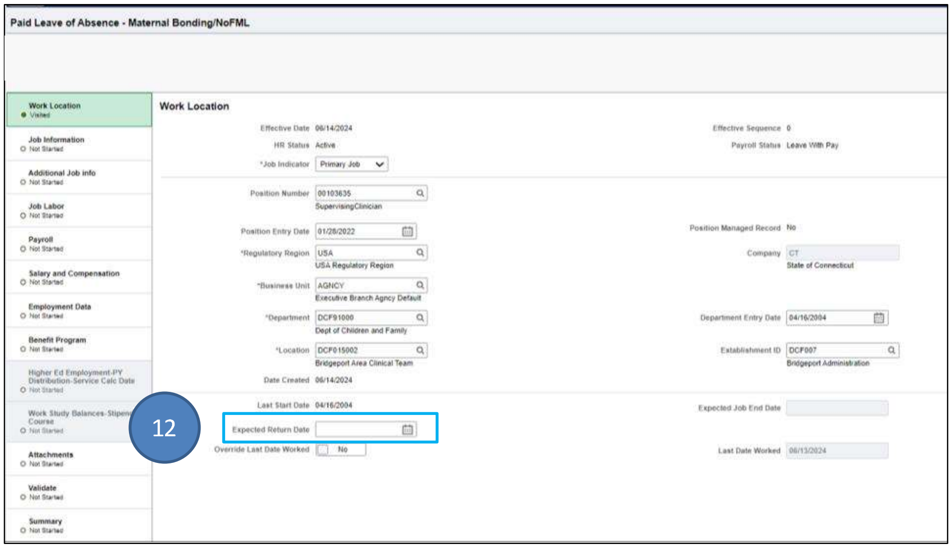



Click the Create Job Action which opens the popup window. Make sure you update the Effective Date field to the correct date and use the appropriate Action/Reason codes. Once you select the Action only the corresponding reasons will appear in the reason search. In this scenario we are selecting PLA/DVB as we are going to be placing the employee on a paid leave. Click the continue button to start the transaction.

*Scenario 2: Paid Leave of Absence*

# Work Location

12. Use the Managing Job Activity Guide and enter in the **Expected Return Date**.








When the Activity Guide opens, you will notice that the Payroll Status has updated to Leave with Pay and the Expected Job End date is now visible on the page. As in today's system, when an employee is out on a leave you will need to enter the Expected Return Date.

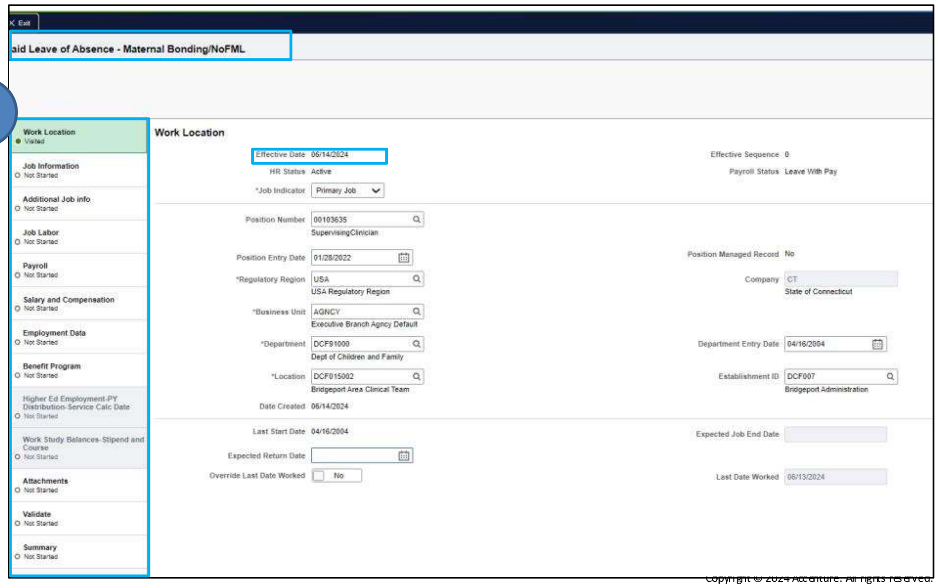
*Scenario 2: Paid Leave of Absence*

# Create a Job Action

13. Continue through the guided process until you have reached the Validate page.

*Note*: **Action Reason** can be found at the top of the page. **Effective Date** will be visible on each page of the Activity Guide.

13

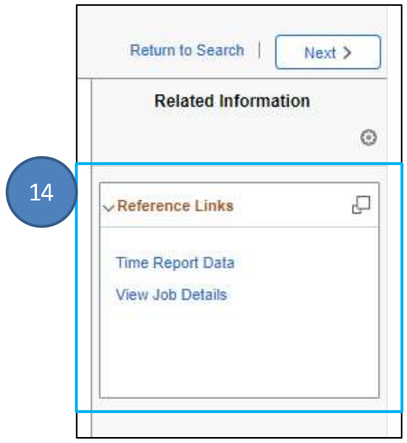





:Since this is the only field needing entry, you can click directly on the tab to validate and then save. One thing I want to point out, the employee name, Empl ID and title will appear just below the Action/Reason but has been removed for training purposes. As with the Action/Reason, and Effective Date this will appear on each page as you move through out the Activity Guide,

## Reference Links

14. Clicking the **Time Report Data** and **View Job Details** will open another tab to view job history.

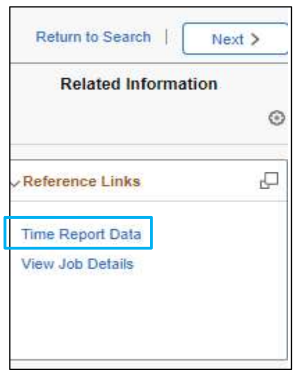


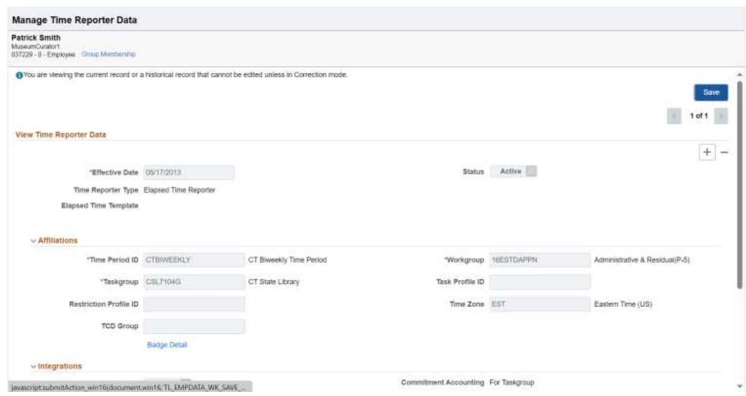



If you need to update the time reporter data page, click on the blue Time Reporter Data link in the Related Information box. This box is always visible so you can update this at any point in the transaction.

## Time Reporter Data Page

Upon clicking on the time reporter data link, we are taken to the time reporter data page. On this page, we can view and edit time reporter data for the employee that the job action is being created for.



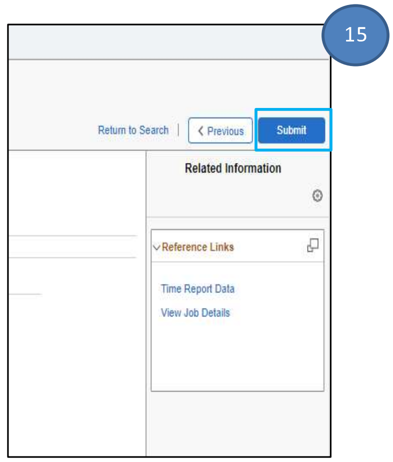



Upon clicking on the time reporter data link, you are taken to the time reporter data page. On this page, we can view and edit time reporter data for the employee that the job action is being created for. It is the same Time Reporter Data page that is used today in Job Data. This page will open in a separate window.

*Scenario 2: Paid Leave of Absence*

## Completing a Job Change

15. Once all information and changes have been updated, click **Submit**.



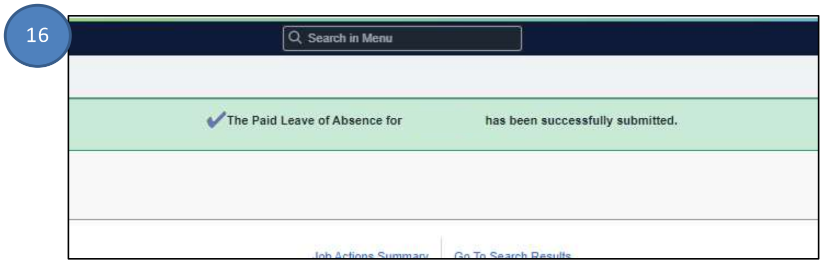



Click submit on the final tab of the activity guide as referenced with number 15,

*Scenario 2: Paid Leave of Absence*

## Submission

16. Upon clicking submit, you will receive a **Confirmation** page that the transaction saved.






Confirmation page will be received.

*Summary Review*

## Let's review our Learning Objectives:

You should now be able to:

- Navigate and access Fluid pages
- Understand how to maintain employee job information
- Recognize and complete the process of creating a job data transaction



In conclusion of this course, users should now be able to:

✓ *Navigate and access Fluid pages*

✓ *Access notes, actions and searching for an employee*

✓ *Understand how to maintain employee job information*

## Questions

- Post questions within the chat .



Are there are questions on the presentation?

## Congratulations! You have now completed the L200 Managing Job Data course!

1. Complete the Training Evaluation.
   [Managing Job Data Survey]
2. Review the course material after Training completion.
   [Training Material Location]
3. Reference the Core-CT Modernization site for more information:
   [Core-CTModernizationProject(state.ct.us)]

>

It appears there are no more questions. A link to a training evaluation will be posted in the chat. If you could please take a few minutes and complete this we would appreciate it. The second link will bring you to job aids that can be used for additional resources. The third link goes to the modernization page which is where we have the items like change agent meeting recordings as well as links to some of our registration items.