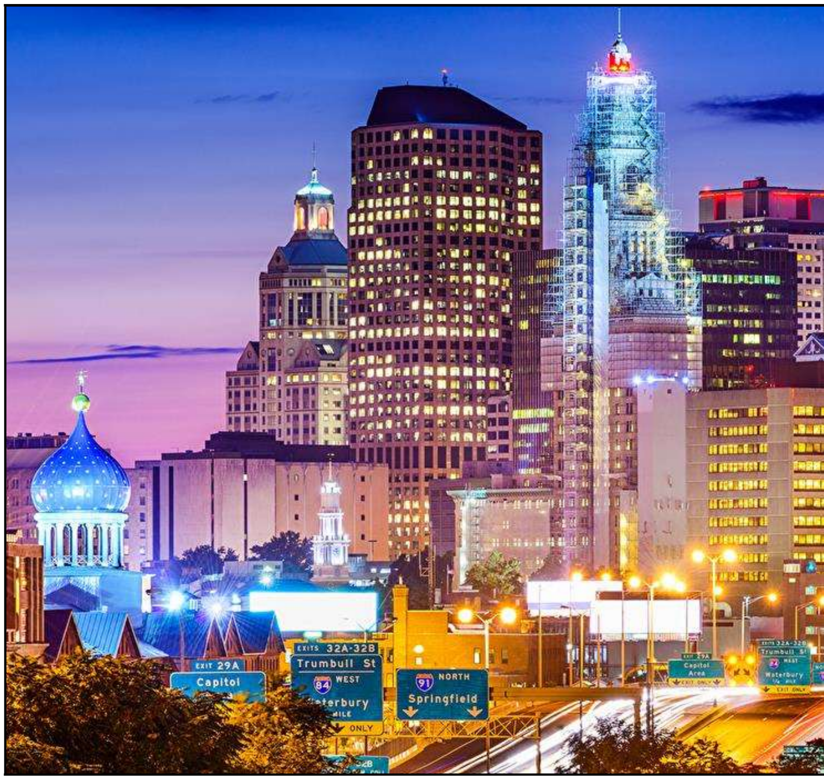

Personal Data L200

Core-CT

October 2024

Hello and welcome to the Personal Data Training Course .

Welcome to the Personal Data 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 will affect Personal Data processes.

You were referred to this class as you have the HR specialist role. This means that you have the ability to create employees, add jobs as well as edit personal data.

Please feel free to ask questions and remain engaged while I provide an overview of the system changes.

Course Intro

Core-CT

Roles

Trainer	Facilitator	Participants
• Cover course content • Speak to the functionality • Answer any questions at the end of each section	• 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: Personal Data Course Survey	• Ask questions in the chat throughout the training **NOTE:** ** Unable to turn on camera* ** Unable to speak*

Here is a brief overview of the Roles throughout this training.

As the Trainer, I will be:

- Covering the course content, including discussing the new functionality

- I'll also be answering questions and maintaining a parking lot for follow up if needed.

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. We have noticed the for some people, the chat feature is not available. If you are not able to submit questions in the chat, please send them directly to Rose Jensen through teams. Her name is listed in the chat for reference and she will include the questions as they come in.

During this presentation, your camera and microphone will been turned off and you won't have the ability to turn them on.

Learning Objectives

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

1. Navigate Fluid Tiles to Add Employees
2. Update/Maintain Employee Data
3. Create Organizational Relationships

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1. Navigate Fluid Tiles to Add Employees
2. Update/Maintain Employee Data
3. Create Organizational Relationships

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 trainings for the upgrade.

- **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.

Today's Agenda

Section
Course Overview and Objectives
Overview of Changes in Personal Data
Create An Employee
Modify A Person
Person of Interest
Organizational Relationship
Review and Q&A

Here is a glimpse at the schedule for today's training . It should take us about 45 minutes to an **Hour depending on the number of questions.**

We will be covering changes in Personal Data, how to Create an Employee and a Person of Interest as well as answer questions.

Overview of Changes in Personal Data

We will explore the changes to the system for inputting personal data

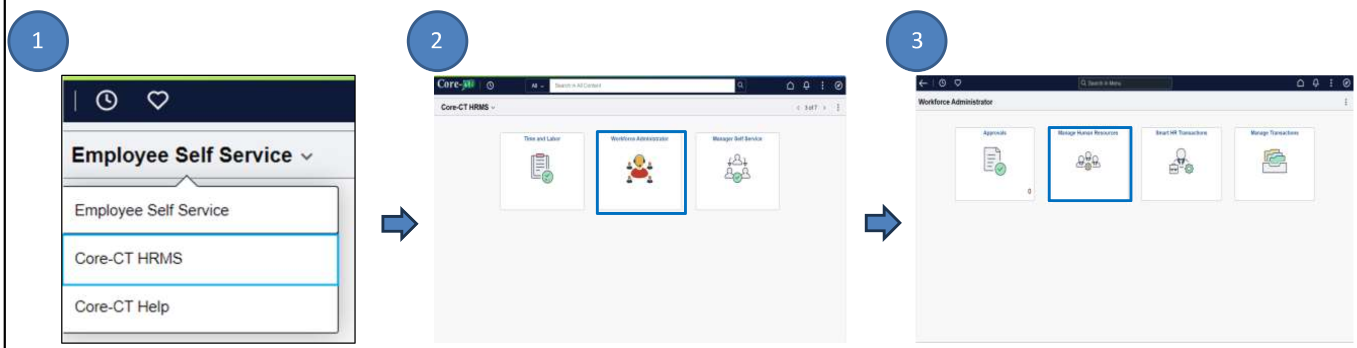
- Discuss the capabilities accessed from the new fluid tiles
- Review the differences before and after the Peoplesoft update
- Run through scenarios to showcase the new update

The next few slides will be an overview of the changes.

1) We will discuss the new fluid tiles and how they are broken out into different topics.
2) Review the differences between the current and new process of adding personal data.
3) We will be running through scenarios to directly show how a user would go about adding and updating employee information

Manage Human Resources

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



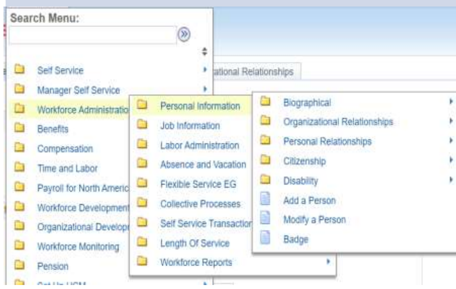
To navigate to the new homepage you :

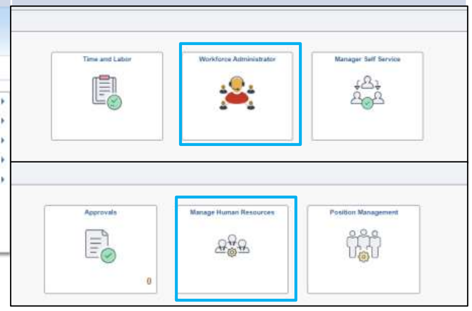
1. Start at the Core-CT HRMS homepage, and click on the Workforce Administrator tile.
2. From there we will click on the Manage Human Resources Tile

This leads us to the section where we will view Manage Human Resources homepage

Differences between old and new navigations

Current Navigation	To Be
Main Menu > Workforce Administration > Personal Information	Menu > Core-CT HRMS > Workforce Administrator > Manage Human Resources



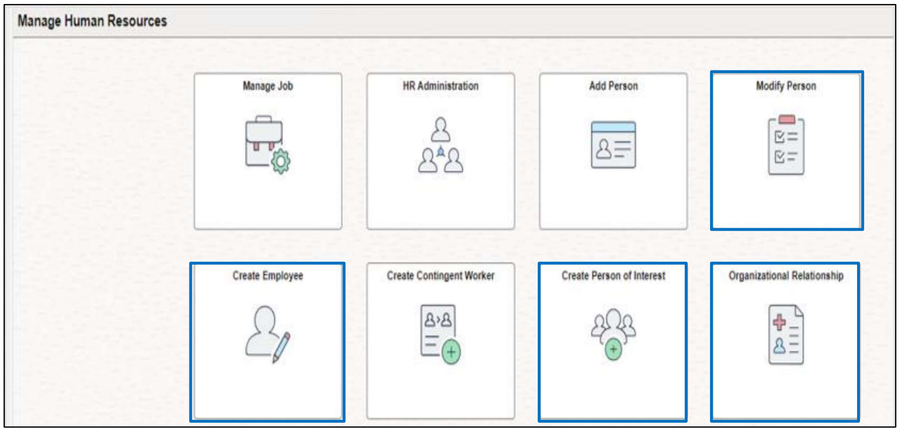


This screenshot compares the navigation between the current system and the new fluid tiles. In the current system, navigating to Add a Person, Modify a Person and Add Concurrent Employment involves multiple steps. In the upgraded system all tiles related to an employees personal information and job information will be housed on one homepage. There is a separate tile for each process making it easier to follow.

The new path which is displayed above is **Core-CT HRMS > Workforce Administrator > Manage Human Resources**

Manage Human Resources

These are the four tiles that now relate to personal data management



Here is a screenshot of how the new tiles appear once you are on the Manage Human Resources homepage. For this training, we will be reviewing the Create Employee, Modify a Person, Create Person of Interest and Organizational Relationship tiles. There may be additional tiles on the screenshot that will not be available to you when the upgrade goes live. These tiles appear based on your security which should not be changing.

As you can see, the screenshot also includes the Manage Job tile which was covered in the Manage Job course. As I mentioned, you can see, that all tiles related to the employee's job and personal information are now located on this one homepage.

Fluid Tile Definitions

- Create Employee – This tile allows you to add an employee and link them to the job that they will be performing
- Modify Person – This tile allows you to edit personal details for a previously added employee
- Create Person of Interest – This tile allows you to create or link a person of interest and assign them to a job
- Organizational Relationship – This tile allows you add a job to a previously created person or add an additional job to an employee that already has one

11

We have included a slide with definitions as the tiles are named differently then some of the items through the current menu path.

Create Employee – This tile allows you to add an employee and link them to the job they will be performing. This is the equivalent to Add a Person in the current system.

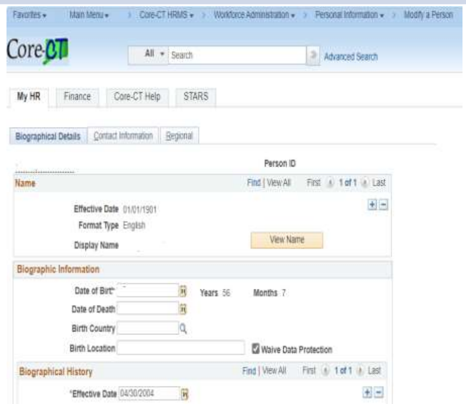
Modify Person – This tile allows you to edit personal details for an existing employee

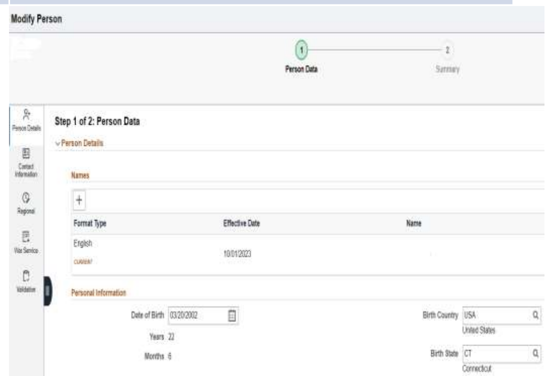
Create Person of Interest – This tile allows you to create a person of interest and assigning them to a job. We will be looking at this tile very briefly. The majority of users do not process **Persons of Interest** and will not have security access to it.

Organizational Relationship – This tile allows you add a job to a previously created person or add an additional job to an employee that already has one. This is the equivalent to Add Employment Instance in the current system.

Overview of Changes in Personal Data

Classic Navigation	Fluid Navigation
Current Navigation	**To Be**
Core-CT HRMS > Workforce Administration > Personal Information > Modify a Person.	**Core-CT HRMS > Workforce Administrator > Manage Human Resources > Modify Person.**





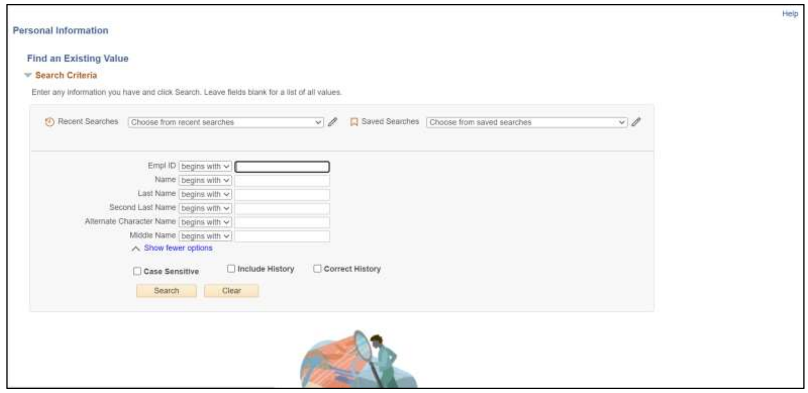
12

In the current system, when you open Modify a Person, the different pages are in tabs that are set up horizontally across the top of the page. In the new fluid system, once when you open the tile for Modify Person, the tabs are now located vertically on the left hand side. The same information is required to hire but the tabs are slightly different. The same information is in the upgraded pages but there are small changes to the tabs which we will review in the hiring a new employee walkthrough.

Overview of Changes in Personal Data

Changes to Modify Person

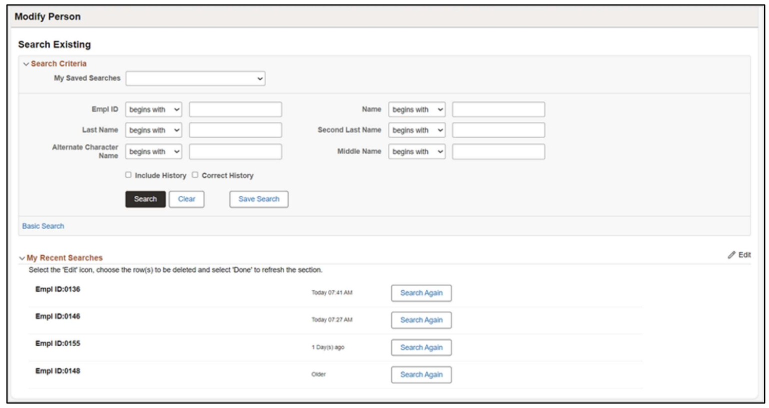
- Previously, the Modify Person search view looked like this, where you could search by Empl ID or any name
- There is also a recent searches section, which allows you to quickly navigate to previously checked employees to modify
- A saved searches section for commonly searched employees was also available



Another change I would like to review is the search page. Here is an example of the search page as it appears today in Modify a Person. At the top of the page, there is a section that will display your recent searches. There is also an additional section where you can save specific search criteria.

Changes to Modify Person

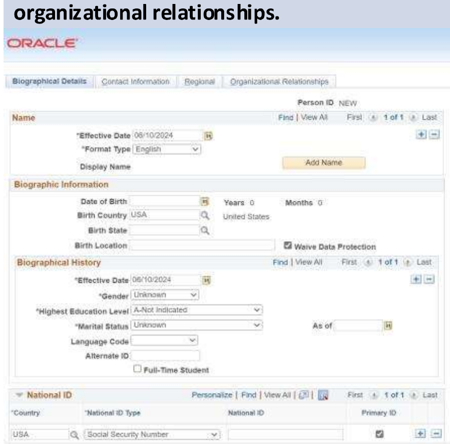
- ➢ The Modify Person Tab now begins on a different looking search page that still allows you to search for the person with any name or their Employee ID
- ➢ You can save a search once the information is entered, in order to quickly access it later from the "My Saved Searches' dropdown
- ➢ There is also a recent searches section, now below the search window which allows you to quickly navigate to previously checked employees to modify

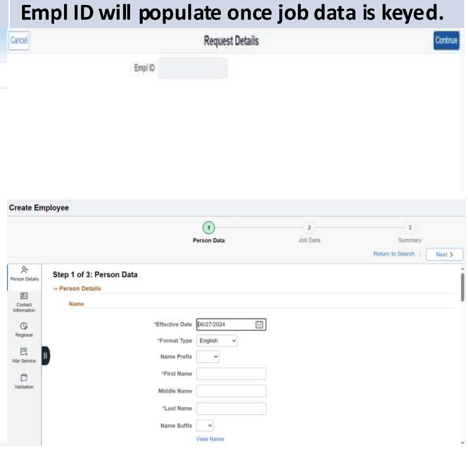


In the upgraded system, the view of the search page is slightly different but contains the same search fields such as Employee ID or name.

The saved and recent search options are now in more visible areas. Saved Searches is still at the top of the page and functions the same. The difference to the page is that now, when you first open the search page, the last five employees that you searched for will automatically appear at the bottom of the screen. This allows for easy retrieval of an employee you recently viewed. All of the other search fields remain the same.

Classic Navigation	Fluid Navigation
Current Navigation	**To Be**
Immediately after clicking Add a Person and clicking "next", you are taken to the biographical information page to enter information. This also contains tabs for contact information, regional information and organizational relationships.	After clicking Create an Employee you are shown a blank Empl ID on the Request Details page. After clicking continue, you are taken to a Person Details page where you can begin entering Personal Data information. Note the Empl ID will populate once job data is keyed.





15

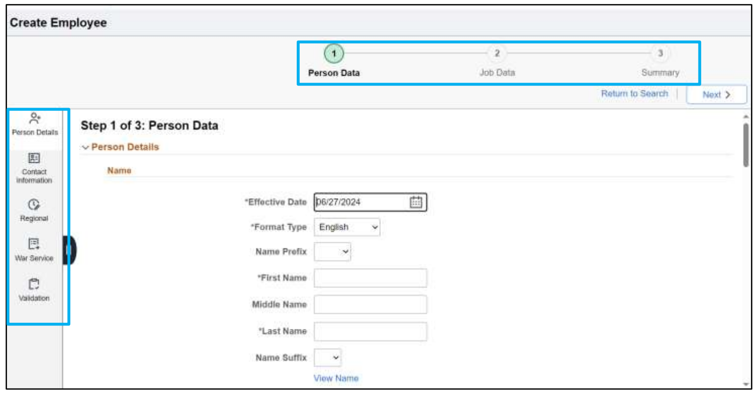
Here is a comparison of the navigation and the page layout for creating a new employee. The left side contains the current menu page and a screenshot of the page when you start to Add a Person. As in Modify a Person, the different pages are located in tabs placed horizontally across the top.

In the upgraded system, when you first click the Create an Employee tile, you will receive a screen that has a grayed out box for the Employee ID. The Employee ID will be auto generated as it is today. The tabs are now located vertically along the right hand side.

On key difference is the Organizational Relationship tab which is currently the last tab while processing a new hire. This tab is now a separate and we will be reviewing later in the presentation.

Changes to Create Employee

- When creating an employee, there are multiple steps in the process.
- The transaction starts with entering the Person Data, followed by entering the Job Data.
- The top header shows which step you are on, while the tabs on the left allow for quick access to any information on the page you would want to add or edit



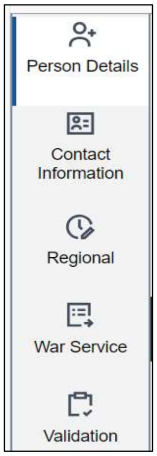
Now we will be reviewing the Create an Employee tile which is currently Add a Person.

While in the Creating an Employee pages, you will notice that the process is handled in steps listed on the top of the page. First, the personal information will be entered, followed by job. Once all the information has been entered, you will be able to save the transaction.

The tab for each section is located on the left for easy access to specific pages.

Overview of Changes in Personal Data

Defining Person Data Tabs



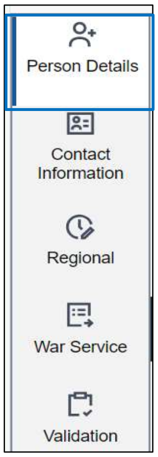
- The Personal Details section allows a user to edit personal details such as name, date of birth, biographical details and national ID
- The Contact Information section allows a user to edit addresses, phone numbers and emails
- The Regional Information section allows a user to edit their ethnic group
- The War Service section allows a user to edit military status, the effective date of the change, and start/end dates of service
- The validation section is where errors would appear, or the data would be deemed valid

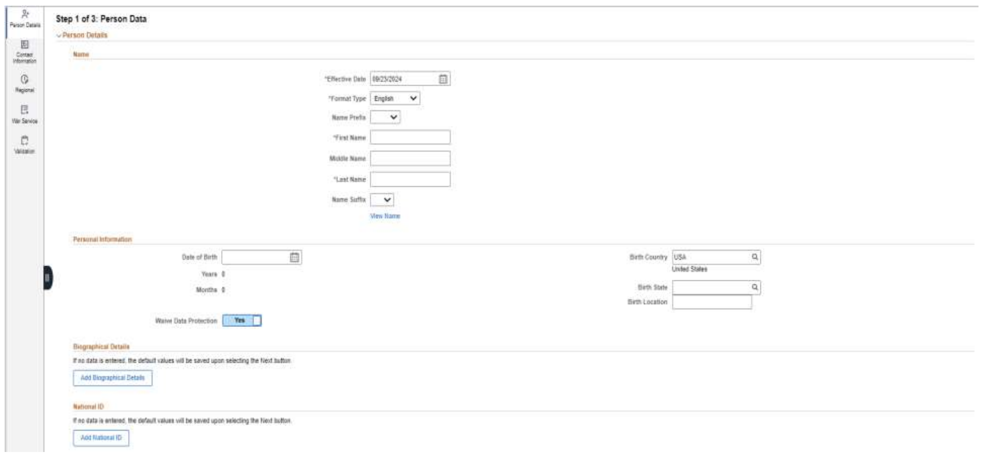
- As I mentioned, the tabs are slightly different.
- The Personal Details section allows a user to edit personal details such as name, date of birth, biographical details and national ID. This was the Biographical Details page today.
- The Contact Information section allows a user to edit addresses, phone numbers and emails
- The Regional Information section allows a user to edit ethnic group
- War Service is a new tab. This section allows a user to edit military status, the effective date of the change, and start/end dates of service
- Another new tab is the Validation tab. This is where errors would appear or the data would be deemed valid

Overview of Changes in Personal Data

Person Details

- The Personal Details section allows a user to edit personal details such as name, date of birth, biographical details and national ID.



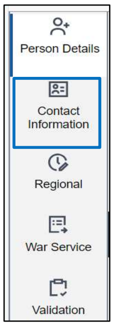


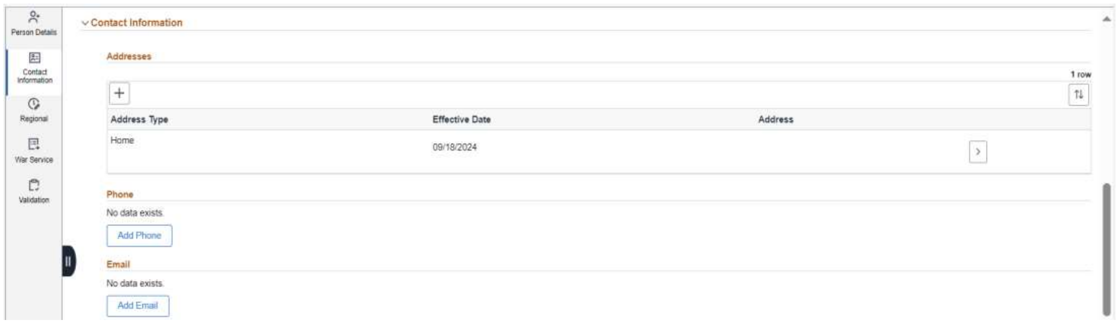
- Lets take a closer look at each tab. The first tab is the Personal Details section which contains fields including name, date of birth, gender, marital status and national ID.
- Both the Biological Details and National ID are available by clicking on the blue box for each section. Both of these will appear in a pop up window.
- The same edits that exist today will continue. For example, if you enter a social security number that is assigned to an existing employee, you will receive the same warning message that the social is already in use and will provide you the the Employee ID it is assigned to.

Overview of Changes in Personal Data

Contact Information

- The Contact Information section allows a user to edit addresses, phone numbers and emails.



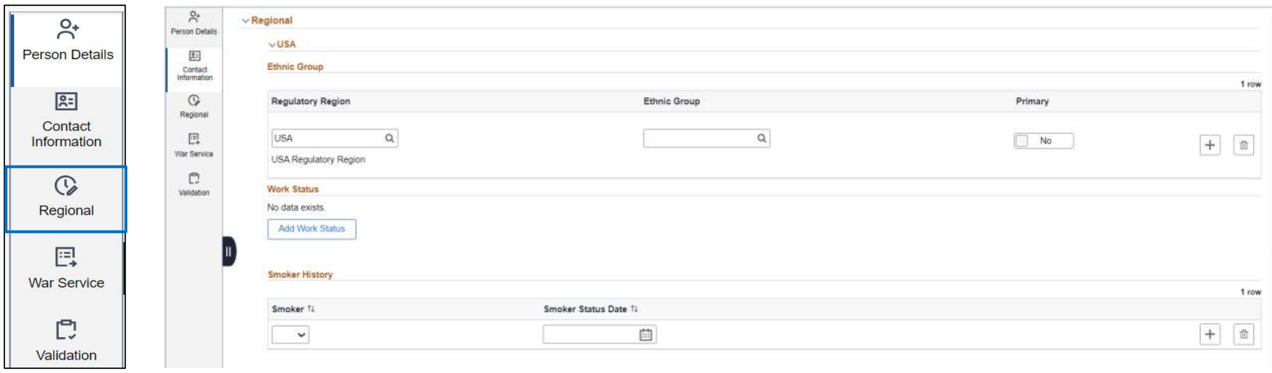


- The Contact Information section allows a user to edit addresses, phone numbers and emails. When you are adding an address for the first time, you will click on the arrow button on the right to open the address detail page.
- Adding an address is slightly different. Today, you click on the blue link to Add Adress Details located to the right of the specific Address Type. In the fluid pages, you will select the plus button above the Address Type, a pop up window will appear for you to select the Address Type and update the information. All types of addresses will be added or updated throught this plus button.

Overview of Changes in Personal Data

Regional

- The Regional Information section allows a user to edit their ethnic group

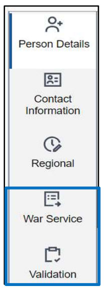


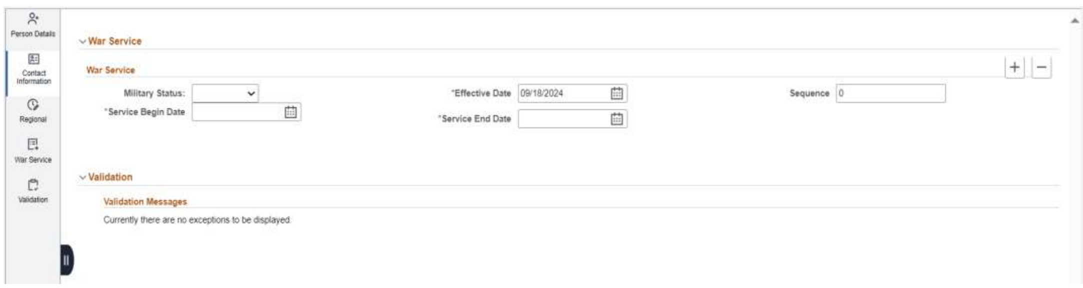
- The Regional Information section allows a user to add an ethnic group the same as today.

Overview of Changes in Personal Data

War Service and Validation

- The War Service section allows a user to edit military status, the effective date of the change, and start/end dates of service
- The validation section is where errors would appear, or the data would be deemed valid

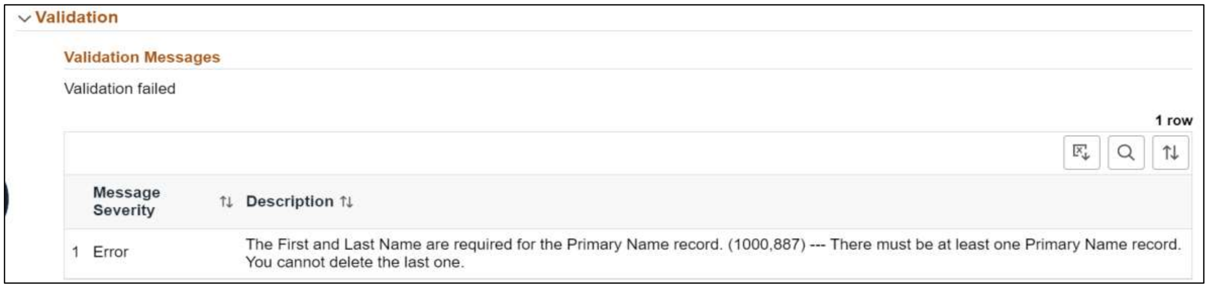




- The War Service section allows a user to edit military status, the effective date of the change, and start/end dates of service. This field was created to hold military service dates that may be used for Longevity. It's informational only and does not contain any rules.
- Below the War Service is the Validation section which I will go over on the next slide. Before I move on, I just wanted to point out that there are two tabs highlighted on the left and you can see information for both War Service and Validation. While in the personal data pages, all the information is on one page. You can use the scroll bar on the right to continue through the sections or use the tabs on the left to go to specific sections.

Validation Errors

- If any field contained in the add a person section is in error and the user attempts to submit the information, they will receive an error message in the validation field
- This field will ensure that all necessary information for an added person is entered before moving to the job page
- Note: These errors will display in the validation section rather than the pop-up that appeared in the previous environment



- When you have completed entering the personal information, there is a validation . When you click the "next" button to move to job, the validation process will first run and show any warnings or errors. This will ensure that all necessary information and/or fields have been completed for a person prior to moving to job. This validation replaces the pop up box that appears in the current system. In this screenshot, we have an error that the name is required.

Validation Warning

- Note that there are two types of validation messages: errors and warnings. On the previous slide, we saw an error which need to be resolved before advancing to the next page and steps.

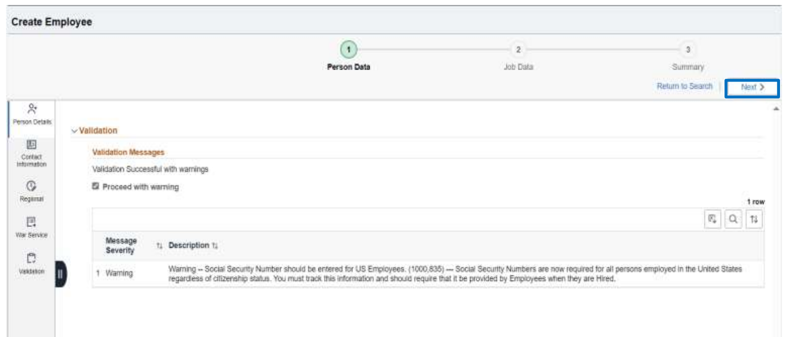
- Here we see a warning, which is an alert to tell you that information is missing; however, with warnings you can check the box labeled “proceed with warning” to move forward without keying the information.

- There are two types of validation messages: errors and warnings. On the previous slide, we saw an error which need to be resolved before advancing to the next page and steps.

- Here we see a warning, which is an alert to tell you that information may be missing; however, with warnings you can check the box labeled “proceed with warning” to move forward without updating the information.

Changes to Create Employee

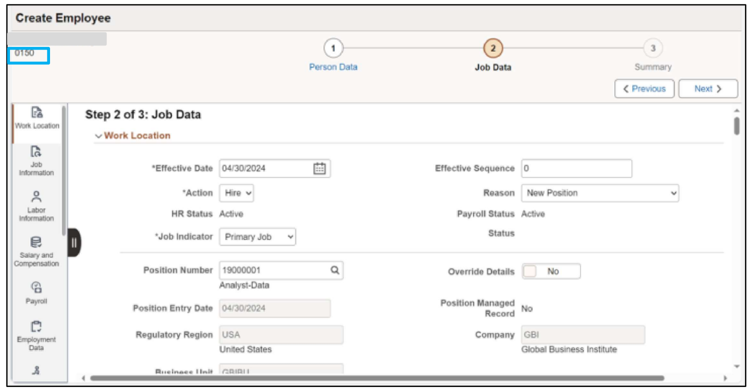
- Once errors and warnings have been addressed, click the ‘Next’ button to proceed
- The system will flash a message that the Person Data has been successfully submitted before moving to the Job Data page.



Once you have checked the box that states Proceed with Warnings, click the next button. A message appears briefly indicating the personal details were successfully submitted.

Changes to Create Employee

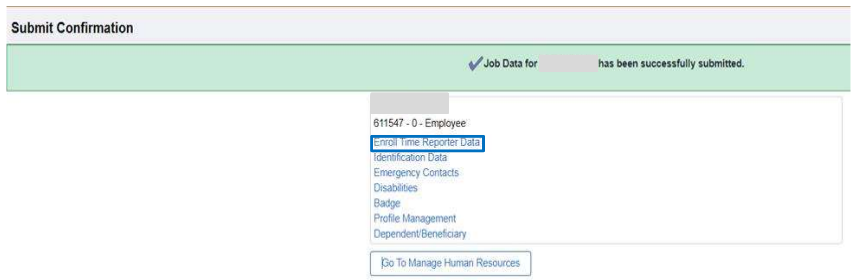
- ➢ Step 2 when creating an employee is to enter the Job Data information.
- ➢ Notice, after the Person Data information was keyed, an Empl ID was assigned and now displays on the Job Data page



The system will bring you to Job Data to complete the hire process. Notice that the step on the top has been updated to Job Data and an Employee ID has been created which is displayed on the top left side of the screen. We will not be covering the job pages here as they were covered in the Manage Job prerequisite course. With that said, there are two differences I would like to point out. While in create an Employee, you do have the ability to update the effective date and the Action/Reason directly on the page which is a difference from adding a new row to an existing employee. The other change is the location of the notepad. Notepad is no longer located within job. Once you save the hire, you will need to navigate to the Job Action Summary page to enter the notes.

Create an Employee Confirmation Page

- After creating an employee and submitting, the Confirmation page will display, indicating the transaction saved successfully.
- Additional transactions can be completed from this screen such as enrolling time reporter data



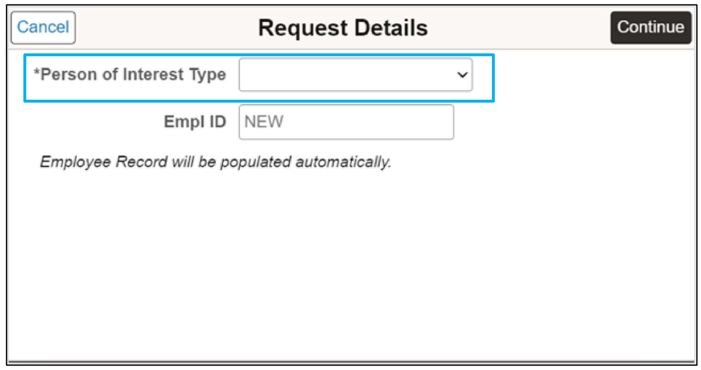
Once you have completed the job information and saved, a confirmation page will display indicating the transaction saved successfully. From this page, users will be able to easily continue to some additional pages that are normally completed along with the hire. This includes such pages as Time Reporter Data and Emergency Contacts.

I will take a quick pause here. Are there any questions on hiring an employee?

Overview of Changes in Personal Data

Changes to Create Person of Interest

- Create Person of Interest Tile: should be used to create a new person data record with an organizational relationship of person of interest, with a job.
- When creating a Person of Interest, users will need to identify the Person of Interest Type before entering any person or job data

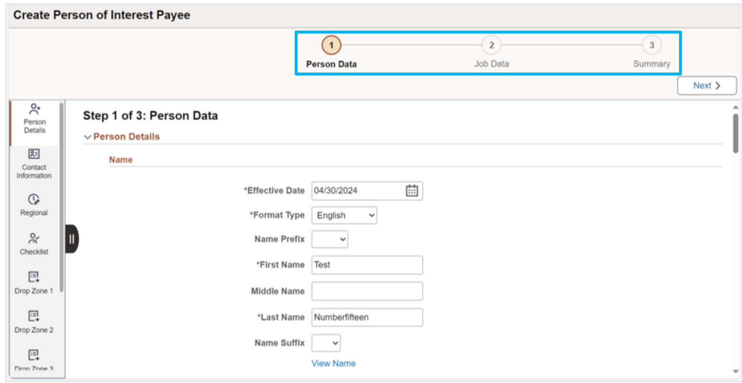


There is one major difference between Creating an Employee and Create a Person of Interest. That difference is the requirement to select the Person of Interest type before continuing on to create the Employee ID.

Overview of Changes in Personal Data

Changes to Create Person of Interest

- When creating a Person of Interest, again there are multiple steps in the process.
- The transaction starts with entering the Person Data, followed by entering the Job Data.
- Once this information has been entered, you have completed the addition of a person of interest.

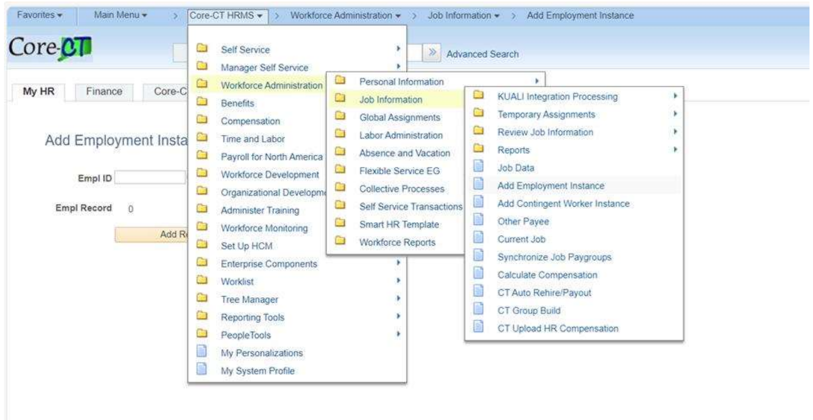


- The rest of the hire process is the same as the example we just walked through. As with that hire, there are multiple steps in the process.
- The transaction starts with entering the Person Data, followed by entering the Job Data.
- Once all information has been entered and saved, you will receive confirmation that your Person of Interest has been completed

Changes to Add Organizational Relationship

- The Organizational Relationship tile is now used to specify the organizational relationship to add a job to a person's record as well as add an employment instance

- In the old view, we would add jobs via the path seen here and the "Add Employment Instance" dropdown. Now, we will use the Organizational Relationship tile for this same function



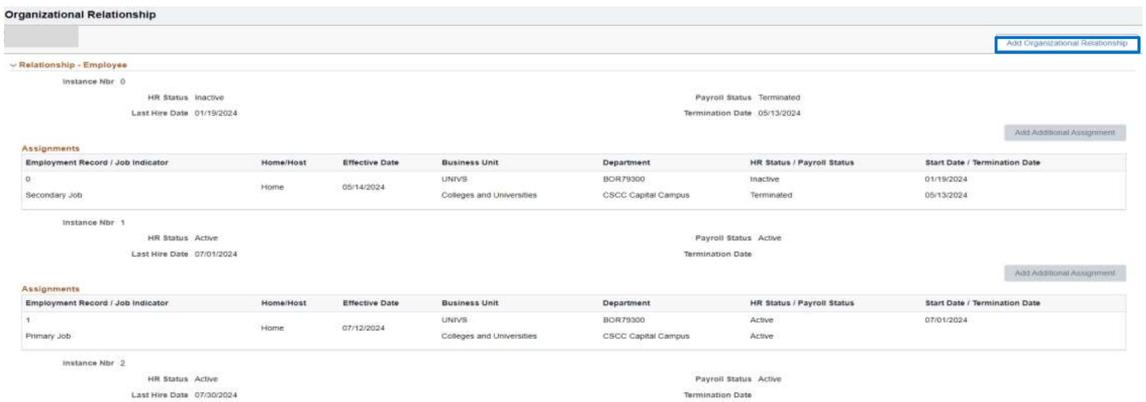
Now I am going to talk about Add Organizational Relationship.

Here is a screenshot of today's menu path for Add Employment Instance which is called Add Organizational Relationship in the upgraded environment.

This is used to add an additional record to an existing employee. It is also the used to search for an employee where the personal information has been entered and saved without a job record being created.

Changes to Add Organizational Relationship

- ➢ After clicking the Organizational Relationship Tile from the Manage Human Resources Dashboard and searching for the desired employee, all existing employee records will appear
- ➢ From this page, you can click the "Add Organizational Relationship" button to add a new job

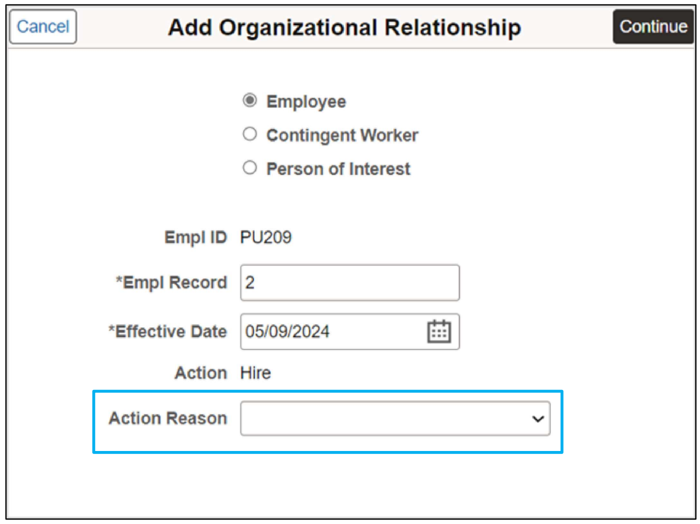


- ➢ After clicking the Organizational Relationship Tile from the Manage Human Resources homepages and searching for the desired employee, all existing employee records will appear. Notice that you are now able to view more information regarding the employee prior to continuing on in the process. A nice feature is that you are also able to tell if the employee is active in any of the existing jobs right from this page.

- ➢ To add a new job, click the "Add Organizational Relationship" located on the right of the screen.

Changes to Add Organizational Relationship

- The Add Organizational Relationship page is used to add a new employment record to an existing employee.
- The system will assign the Empl Record number for this job, based on the employee's existing employment records.



Here is a screenshot of how the page looks after you have clicked the Add Organizational Relationship link. A screen will appear where you must select the type of employment the same way you do today on the Organizational Relationship tab in personal data when hiring. Most of you only see the option for Employee based on your security access and that will be your only option here as well..

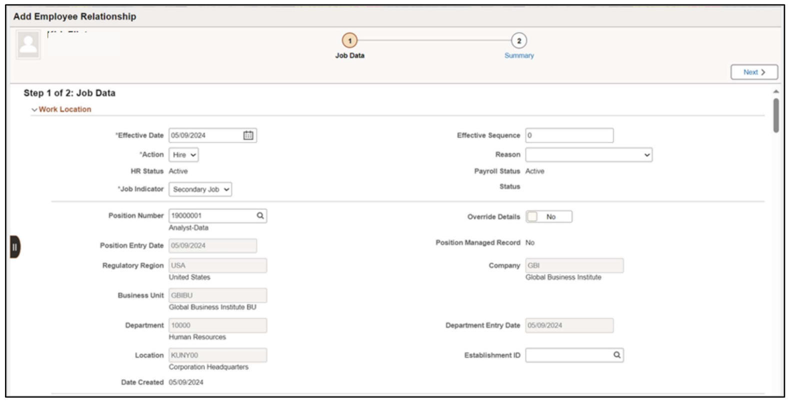
The system will assign the next sequential Record number, based on the person's existing records.

Since you are creating a new record number, the action will default to hire and you will need to enter the correct effective date and reason prior to proceeding.

Overview of Changes in Personal Data

Changes to Add Organizational Relationship

- When adding an organizational relationship, there are two steps in the process.
- The transaction starts with entering the Job Data information due to personal data already existing in the system.
- Once you have completed job and saved the transaction, the process is complete.

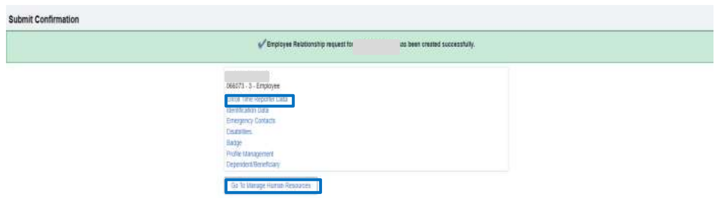


- When adding an organizational relationship, there are two steps versus the three for create an employee. Since the employee already exists, personal data does not need to be completed and the transaction starts in job.
- Something I want to point out, although we have seen what the new record will be in the previous slide, it is not visible on the job pages while completing the transaction.

Changes to Add Organizational Relationship

- After adding an Organizational Relationship, the Submit Confirmation page will display, indicating the employment instance was created successfully.

- If users have additional transactions to enter, such as enrolling time reporter data, they can do that from this page. Additionally, you can click the “Go To Manage Human Resources” button to return to the Manage Human Resources homepage.



Upon saving the transaction, you will receive a confirmation which will also include the new record number.

The same links appear as when hiring a new employee for easy access to pages that you may need to update such as Time Reporter Data.

If no additional pages need to be updated, you can click the Go to Manage Human Resources and it will return you to the Manage Human Resources homepage.

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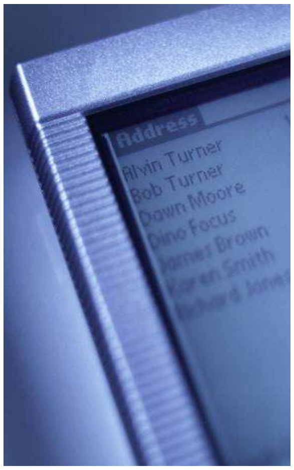
Summary



Let’s review our Learning Objectives:

You should now be able to:

- ➢*Navigate and access Fluid pages*
- ➢*Administer HR processes (Create and Maintain Employee Personal Data, as well as adding an Organizational Relationship)*
- ➢*Know the changes from the current to the new update*

34

- During this session, you should have learned to :
  - ➢*Navigate and access Fluid pages and tiles*
  - ➢*Administer HR processes (Create an Employee, a People of Interest and Adding an Organizational Relationships)*
  - ➢*Understand the changes from the current format to the new update*

Questions?

This concludes the presentation portion for Personal Data and we can open it up to questions.

Post Training Follow Ups

Please enter a FootPrints ticket with any questions:

- URL: https://footprints.ct.gov/footprints
- FootPrints tickets route directly to the Teams
- If FootPrints Access is needed please email the readiness mailbox with the Subject: FootPrints Access
- Readiness@ct.gov (anyone without a ct.gov email address)

Do you have any questions?

Congratulations! You have now completed the L200 Personal Data course!

1. Complete the Training Evaluation.
   Personal 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)

37

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 to complete the survey we would appreciate it. The second link will bring you to the job aids that can be used for additional resources. The third link goes to the Core-CT modernization page which is where we have the items such as change agent meeting recordings as well as links to some of our registration items. This website will continue to be updated with more information as it becomes available.