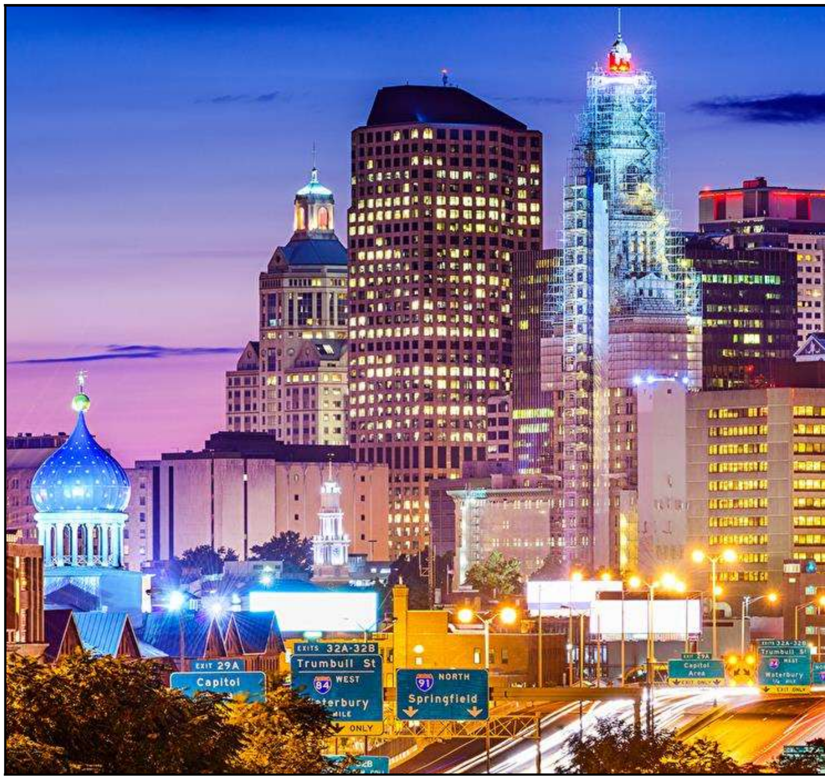

Position Approval L200

Core-CT

October 2024

Good morning, everyone, and welcome to the Position Approval L200 course. My name is Rose Jensen and I am the Principal HR Specialist with the Core HR team. Today we'll be building on the topics reviewed in the Position Management course to delve into the changes to the Position Approval process that are coming with the upgrade.

Welcome to the Position Approval L200 Course

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

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There are a few guidelines to consider while attending today's session.

-We encourage you to ask questions via chat to seek clarification or raise points we may not have addressed. We will pausing throughout the course to answer questions.

- Overall, this course will highlight the system upgrades and changes as they impact the Position Approval process.

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: Position Approvals 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 we'll briefly review the roles for today's training:

<u>As the Trainer, I will be:</u>

- Covering the course content, including discussing the new functionality

- As well as answering any questions at the end of each section

<u>We also have a separate Facilitator who is:</u>

- Sharing the presentation and managing time

- The facilitator will also direct questions from participants to the me at the end of each section

As the Participants, please:

- Ask questions in the chat throughout the training as you will be unable to turn on your microphone.

Please note, we discovered in an earlier training that some participants aren't able to use the chat. If that's the case, you can direct your question directly via Teams chat to Cheryl Catania, who will post her name here in the meeting chat. Alternatively, you can email readiness@ct.gov, who will be assembling a Q & A to be posted after the class.

Course Overview and Objectives

Overview of changes, use cases, and key terminologies for position approvals and management

System changes resulting from the upgrade include:

- New Fluid Dashboard
- Position Approval is accessed through the Fluid Tiles
- Worklist page is replaced with Pending Approvals page
- Location of approver comments
- New Summary page when accessing position details
- Adding Rows is not a requirement for approval process; as a result, approvers no longer enter an Effective Date or Reason Code
- Alerts and actions can be found in the Notification Center using notification bell

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- From a high level perspective, some of the changes that can be expected from the Upgrade include the following:
    - Introduction of the Fluid Dashboard which is the new user interface
        - The fluid dashboard consists of new updated navigations, pages, and tiles to access pages in Peoplesoft. Although functionalities will remain similar, the look and feel and ways to access will change.
    - Position Data and the accompanying approval process have changed significantly in the following ways which we will discuss in detail today:
        - The Position Approval tab is now only available to view historical approval data (that is – approvals entered in the current system). With the fluid upgrade, the Position Approval tab is replaced by the Approval Chain, which shows the approver roles and names, timestamps for each approval, and functions as a place for approvers to add comments.
        - The notification center will now be the place for necessary alerts and actions items, instead of a worklist.
        - There is now a summary page which compares the proposed changes to the current position values.
        - Adding rows is no longer part of the approval process. Instead, each position transaction is a single row, no matter how many approvals

are received. As a result, approvers no longer enter an Effective Date or Reason code.

Course Intro

Learning Objectives

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

- Access Position Approval Fluid Pages
- Manage And View Pending Approvals
- Understand the Position Approval Revised Process
- Walk through the following Position Approval scenarios:
  - Approving or denying a new position transaction
  - Pushback (Replaces recycling) pending approval for incomplete or incorrect information

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After completion of this course, users should be able to:

- Access the position approval fluid pages
- Manage and view pending approvals
- Understand position approval processing and navigation
- Be able to watch and understand walk-through demonstration sessions that cover the topics of approving/denying positions and pushback approvals due to incomplete or incorrect information
  - A key item to note is that the recycle action is being replaced by the push back action. The purpose remains the same; this is essentially just a change to the name of the action.

Today's Agenda

Section
Course Introduction
Unit 1: Position Management Approvals Changes
Unit 2, Part 1: Manage Pending Approval Demonstration
Q&A
Unit 2, Part 2: Pushback Pending Approval Demonstration
Unit 2, Part 3: Deny Pending Approval Demonstration
Unit 3: Summary
Q&A

- Today's agenda will be as follows:
  - Course Overview and Objectives
  - Reviewing Position Management Approvals
  - There will be 3 examples to show how to approve, push back, and deny pending positions
  - Course Review
  - We will be pausing for Questions and Answers multiple times throughout the course

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.

As a refresher, here are some the terms we'll be using throughout the L200 courses:

- **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: Position Approval Changes

When do we use Position Approvals?

HR users will Approve, Pushback, or Deny position records.

The **Position Approval** tile can be accessed from both the **Manager Self Service** or the **Workforce Administrator** dashboard.

*For this course, we will access from the Workforce Administrator perspective. Note: Depending on security access, the **Manager Self Service page** can also be utilized using the same procedures.*

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As I mentioned before, position management and the position approval process have experienced significant changes. However, it's important to note that while the *how* of position management/approval is changing, the underlying business processes have not. Transactions that require approval in the current system will require the same approvals in the upgraded system.

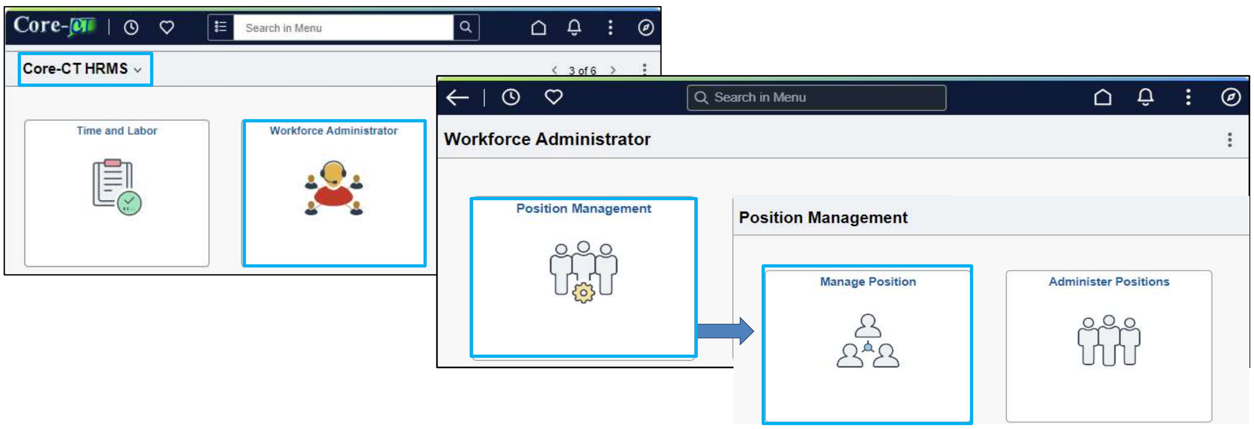
And, as in the current system, position approvers will have the ability to approve, push back, or deny position transactions. However, instead of accessing pending positions from their worklist, they will be accessed through the Approvals tile. This tile can be accessed through both the Workforce Administrator or Manager Self Service dashboard.

Manage Position

Navigation: *Core-CT HRMS > Workforce Administrator> Position Management > Manage Position*

***The Manage Position* Tile allows the user to:**

- Create, Update, and View Position Data Details



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This is the new Workforce Administration Homepage, as we reviewed in the Position Management L200 course. To navigate to this page, you will:

1. Begin at the Core-CT HRMS homepage, and then click on the Workforce Administrator tile.
2. From there we will click on the Position Management tile, which will bring us to the Position Management homepage. As shown above, this consists of two tiles:

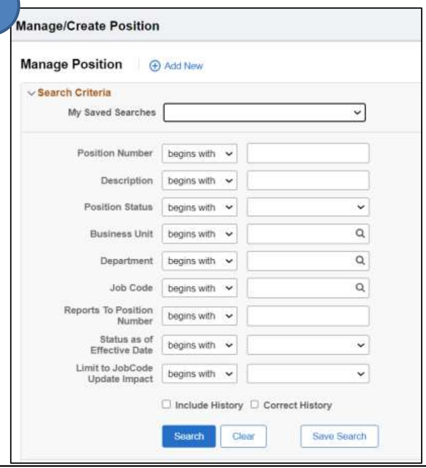
- **Manage Position Tile** : Is utilized to both create and update position data.
- **Administer Position Tile:** Is used to view a summary of all position data changes or view the incumbent history of . This is read-only, you can not make changes here.

Search for Positions

1. On the **Manage Positions** page, input the search criteria to populate the appropriate profile and select "Search"

2. From the Search Results, select the right arrow to open the position page details

1



10

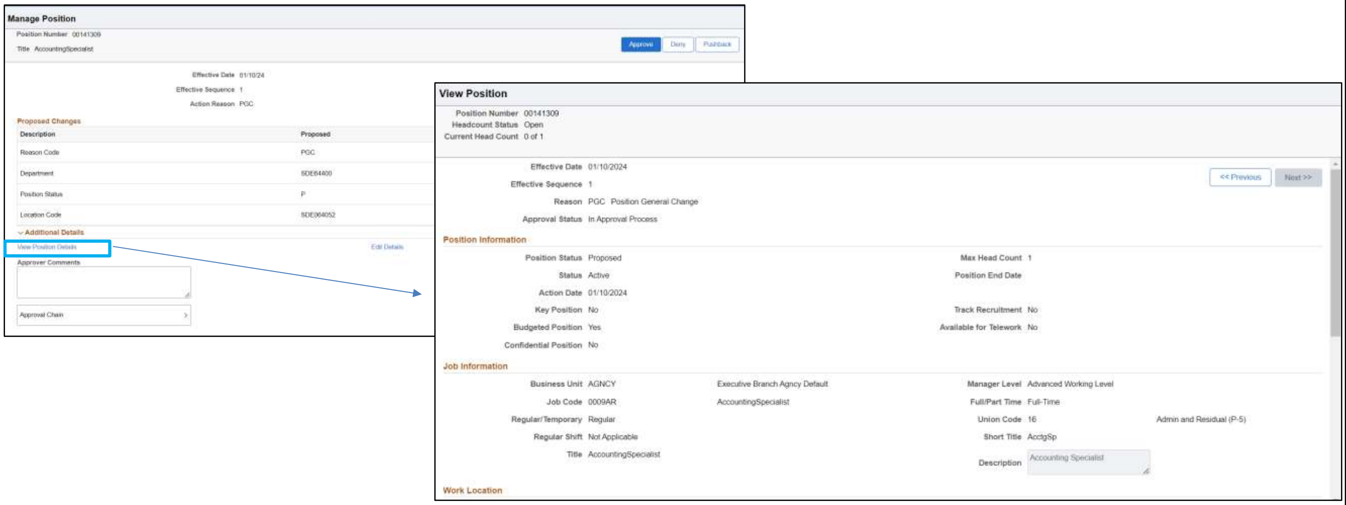
Once landing on the Manage/Create Positions page, users can search for positions by entering in search criteria to narrow down the populated results. It's important to note that if you are searching for a specific position number, all eight digits must be entered in the search field, including the leading zeroes.

Once the search results are populated, positions can be viewed in further detail by selecting the right facing arrow, highlighted as #2 above.

I'd like to highlight that positions cannot be approved from the Manage Position page, however, approvers may want to access this page in order to view a position's historical information.

Approval Links

- **View Position Details** to review more information about position



As I mentioned on an earlier slide, Position approvals will now take place through the Approvals tile. The screenshot on the left is a view of a pending approval. From this page, the approver can click "View Position Details" as another means to view the details of the position. This will open the position details in another window so that the approver can review all of the fields on the position being considered for approval. **(This can be helpful, as the summary on the Approvals page itself only shows that fields that were changed?)**

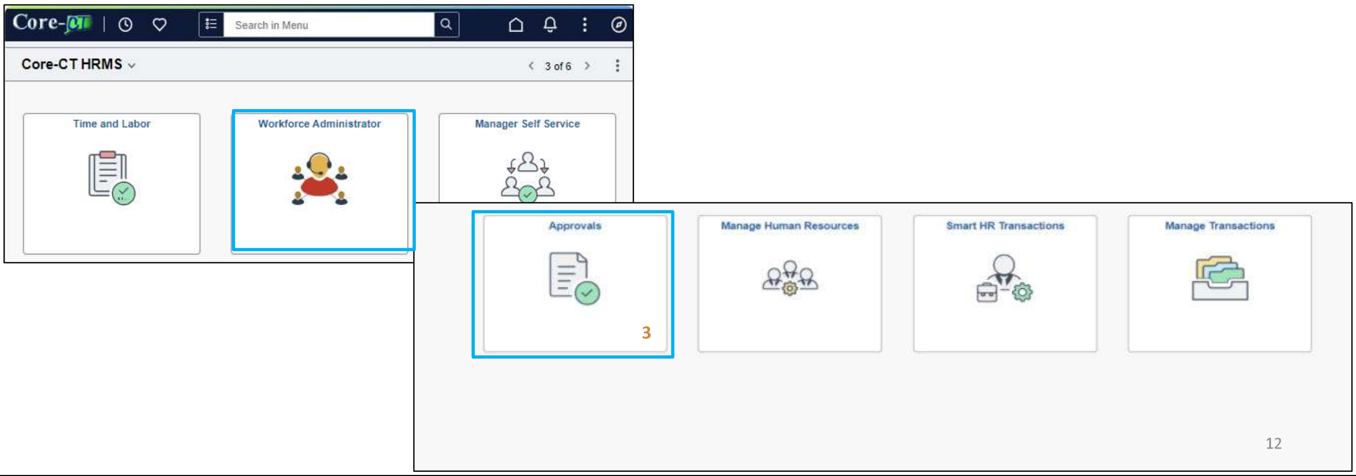
We will explore the approval page in depth as we continue in this course.

Approvals via Tile

Navigation: *Core-CT HRMS > Workforce Administrator > Approvals*

With the new Fluid interface, users can approve all pending position requests using the Approval tile or access individual requests from the Notification Bell.

- Users will be able to complete the actions for approvals from the Workforce Administrator homepage.

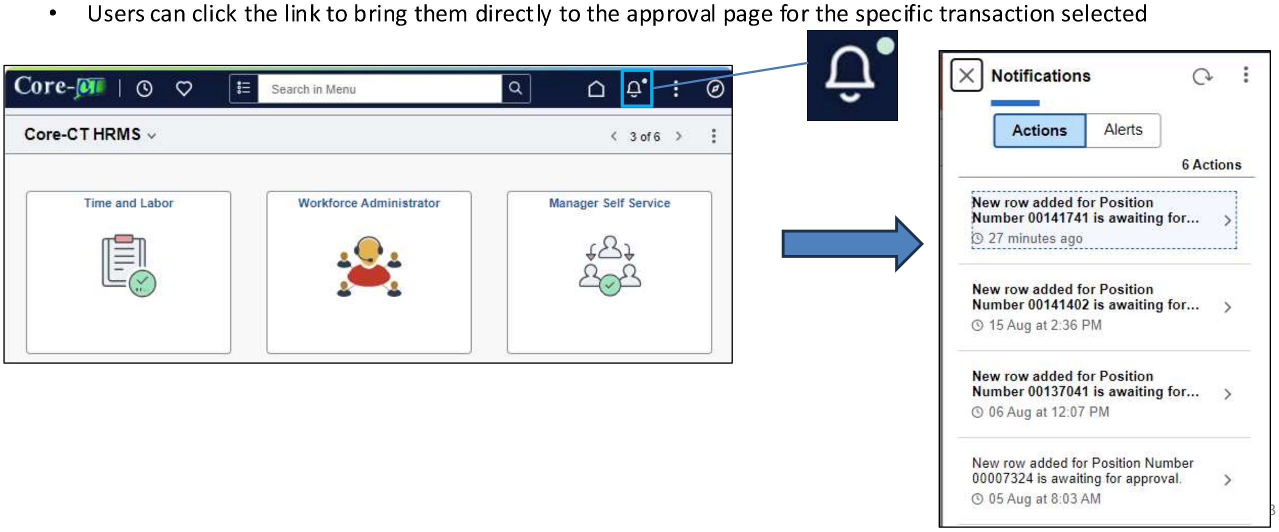


To see all of the transactions pending their approval, users should navigate to the Approvals tile, using the navigation path shown here. The Approvals tile will reflect the total number of approvals pending for that user with a total in the lower right corner of the tile. Users will click the Approvals tile to brought to a listing of all transactions requiring their approval.

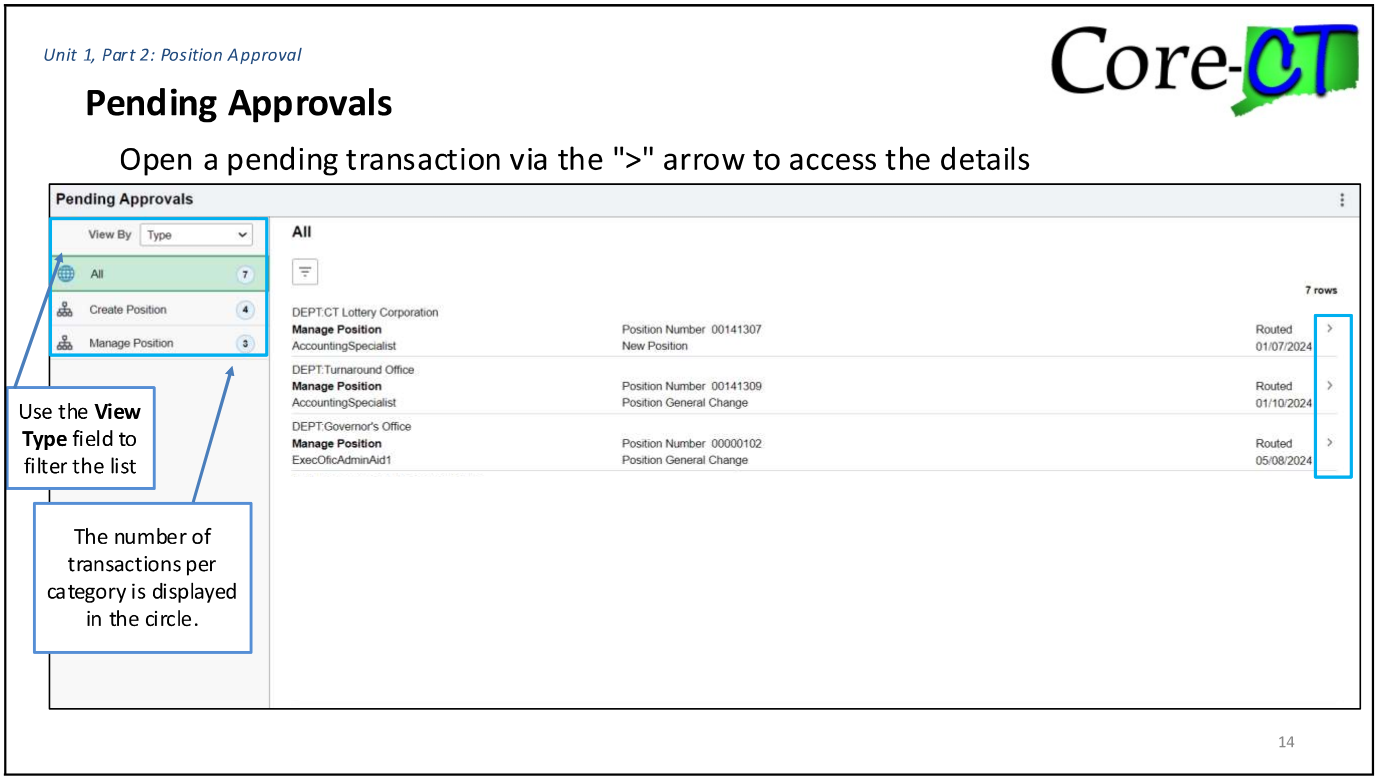
Approvals via Notification Bell

An additional way to approve individual requests is from the Notification Bell.

- A green dot appears on the Notification Bell if new pending transactions require your approval
- Users can click the link to bring them directly to the approval page for the specific transaction selected



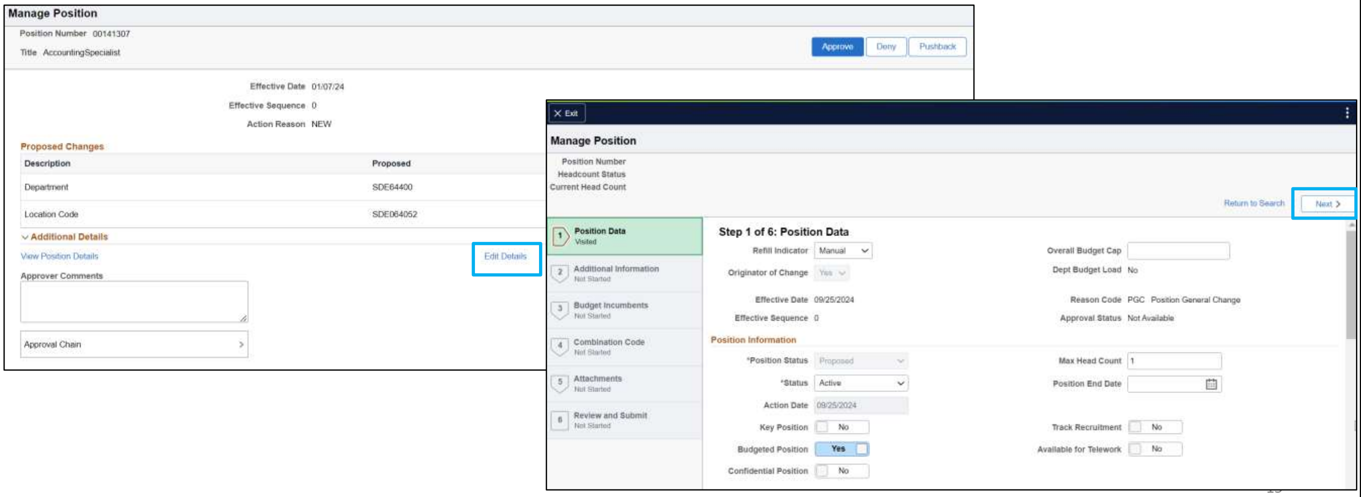
Alternatively, users can access individual items that need their approval through the notification bell icon. If a new pending transaction is submitted that requires your approval, a green dot will appear just beside the bell icon. You can click on the icon and a list of items pending your approval will appear. You can click on the link to be brought directly to the approval page for that position.



Here is a view of the Pending Approvals summary page, accessed by clicking the Approvals tile we saw earlier. All submissions that are pending your approval will display here. You'll notice that new positions and updates to existing positions are listed separately in the left hand panel. In this screenshot, there 4 new positions under "Create Position" and 3 existing positions to be approved under "Manage Position." Users can then select the right arrow on each item to view further details and enable the desired action.

Approval Links

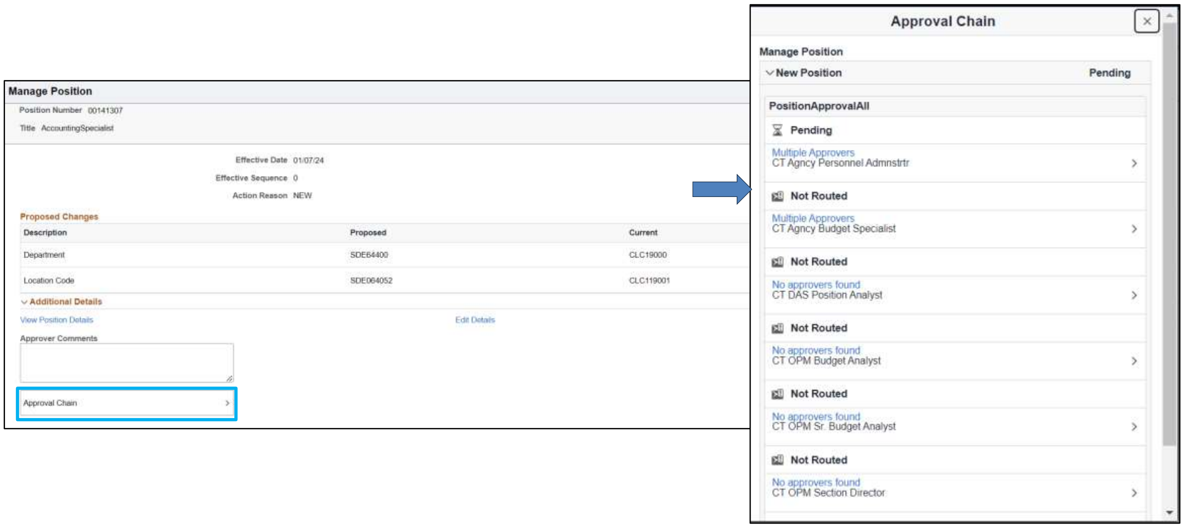
- Select the **"Edit Details"** button to update position details
  - Approvers can no longer update the Effective Date or Reason Code
- Select "**Next**" to progress through the activity guide



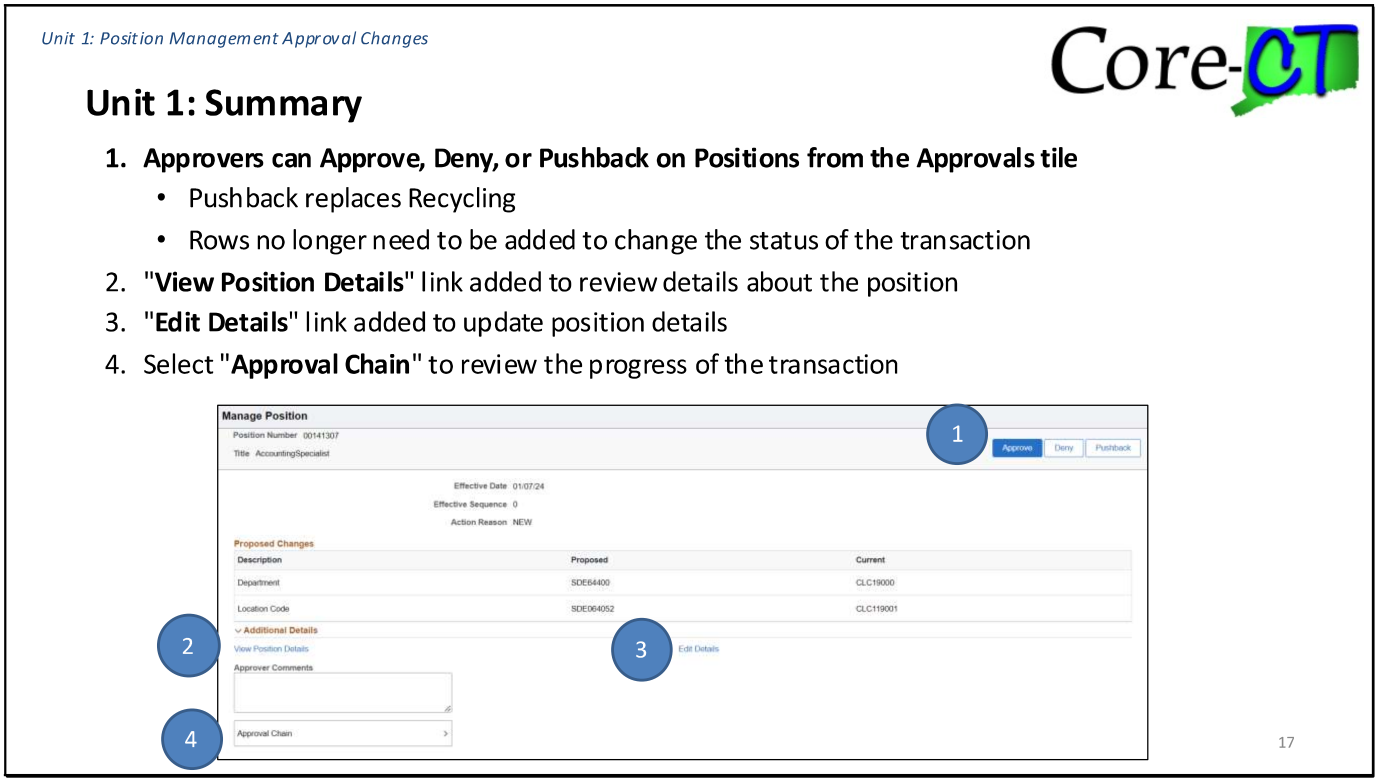
Clicking an individual pending item will bring you to the approval page, where you have the option to View Position Details, as discussed on a prior slide, or Edit the Details of the pending position transaction. If you click Edit Details, note that you will need to proceed through the Activity Guide, just as you would to initiate a new position transaction, to make your changes. You will then be prompted to return to the Approval page to approve the position you have just edited. Please note: approvers will not be able to modify the Effective Date or Reason code. If these values are incorrect, the transaction will need to be pushed back.

View Approval Chain

- **View Position Details** to review more information about position



Select the Approval Chain right arrow to view the order of approvers for the selected position. The Approval Chain lists the roles of the approvers that are required for this transaction. If there is only one user with that role on the Approval Chain, their name will appear in blue; if there are multiple users with that role, you'll see "Multiple Approvers" as shown in the screenshot. You can click Multiple Approvers to view the names and titles of the approvers.



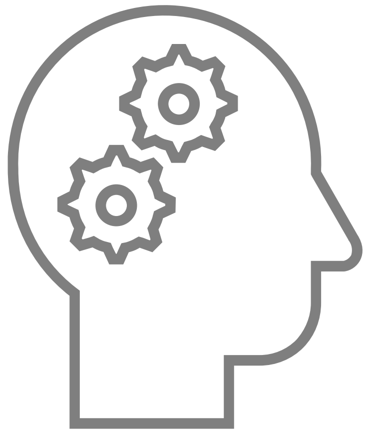
- **Approvers can Approve, Deny, or Pushback from this page**
  - Reminder that Pushback replaces recycling
  - An approver can pushback a pending transaction to question the purpose, accuracy, or incompleteness of the request. Pushing back a position returns the transaction to the originator, just as recycling does today. The originator will receive an alert on their homepage that the position has been pushed back.
  - After being pushed back, transactions will be in a rework status which can be viewed from the Manage Position page

- **View Position Details** link on the Approval page has been added to access further details about the position

- **Edit Details** link has been added to update fields on the pending transaction
- **Position approval chain** can be viewed by selecting the right arrow highlighted as #4 in the screenshot

Unit 1: Summary

1. Approvers will **no longer add a new row** to send a transaction to the next level of approval
2. The approve position tab will **no longer** appear on the Position Data pages. It can now be accessed via the approval chain link for historical changes only (Read Only)
3. The pending approvals page **can be accessed** via the Notifications button in the Oracle banner



- With the update, approvers will no longer add a new row to approve, push back, or deny a transaction. There is only one row for each position transaction, no matter the number of approvals it required.
- The Position Approval tab will no longer appear in the Position data pages. Instead, you'll access the Approval Chain link to see approver comments and timestamps of when each approver took action on the transaction.
- Pending approvals can also be accessed by using the Notification bell icon which will alert users of new actions requiring their approval.

At this time we will pause to take questions. Please put your questions in the chat.

Unit 2: Managing Pending Approval

The instructor will now provide a walk-though of how to approve positions for a pending transaction.

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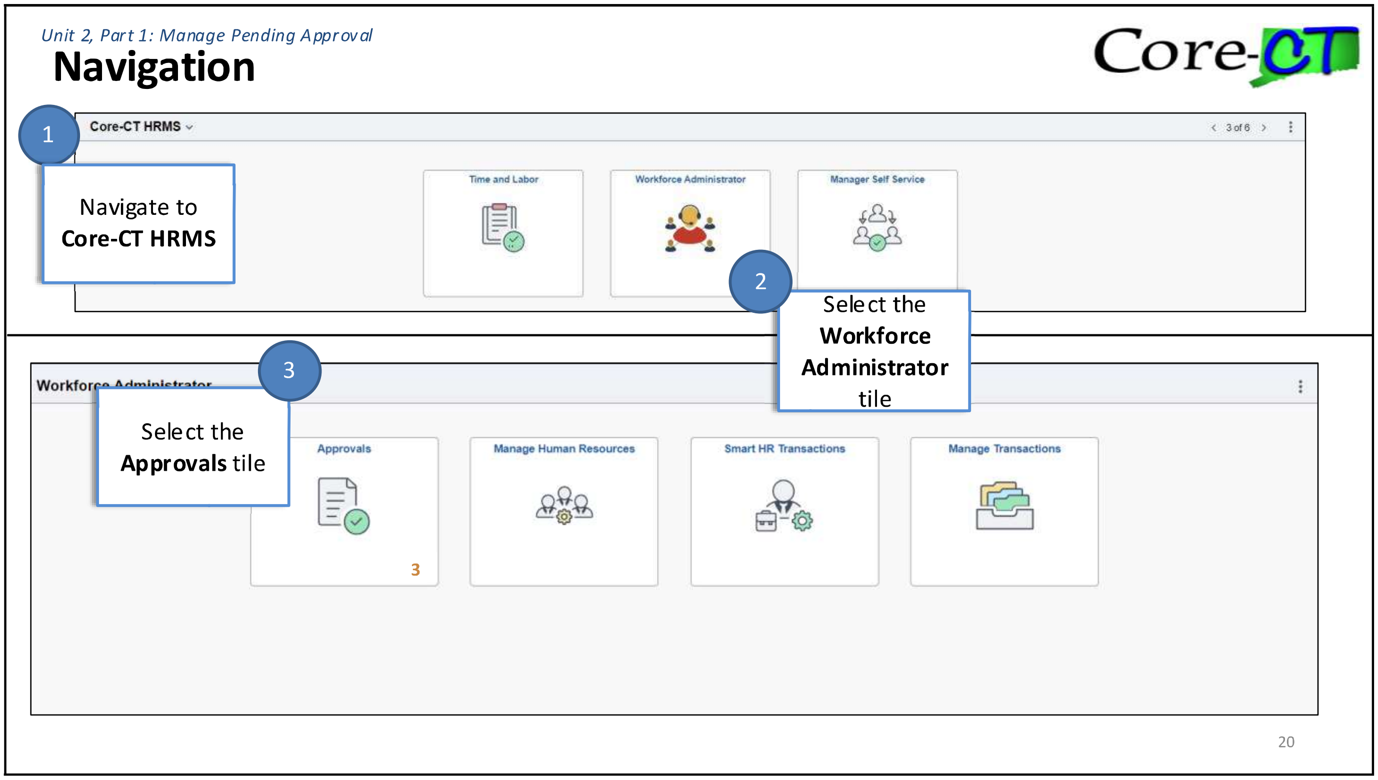
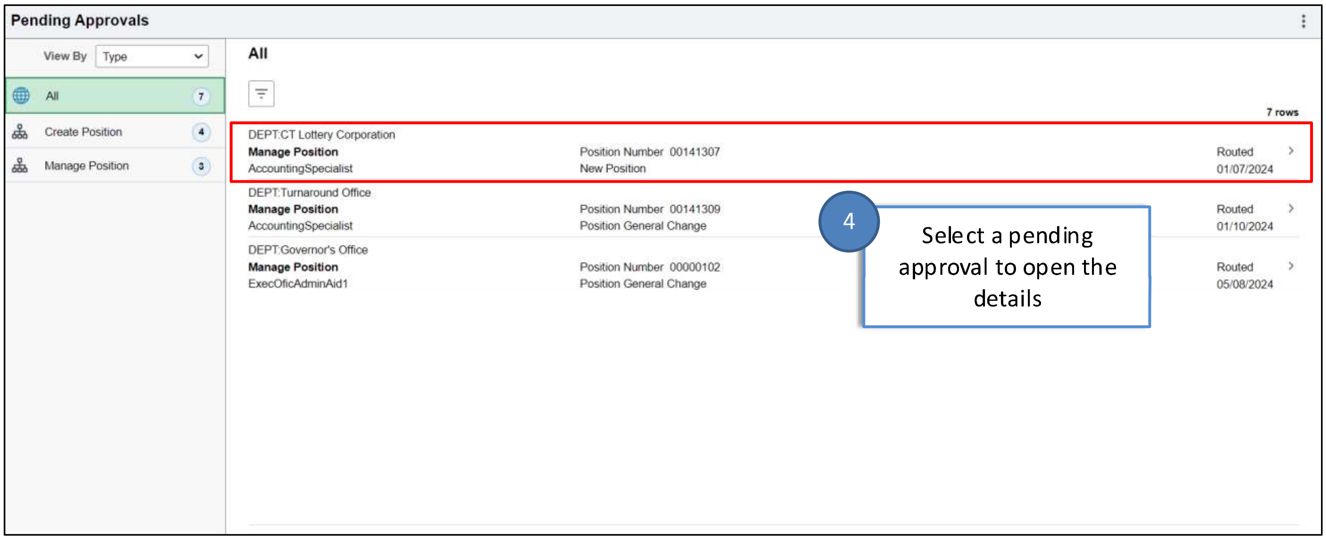
We will now walk through how to approve a pending position transaction.



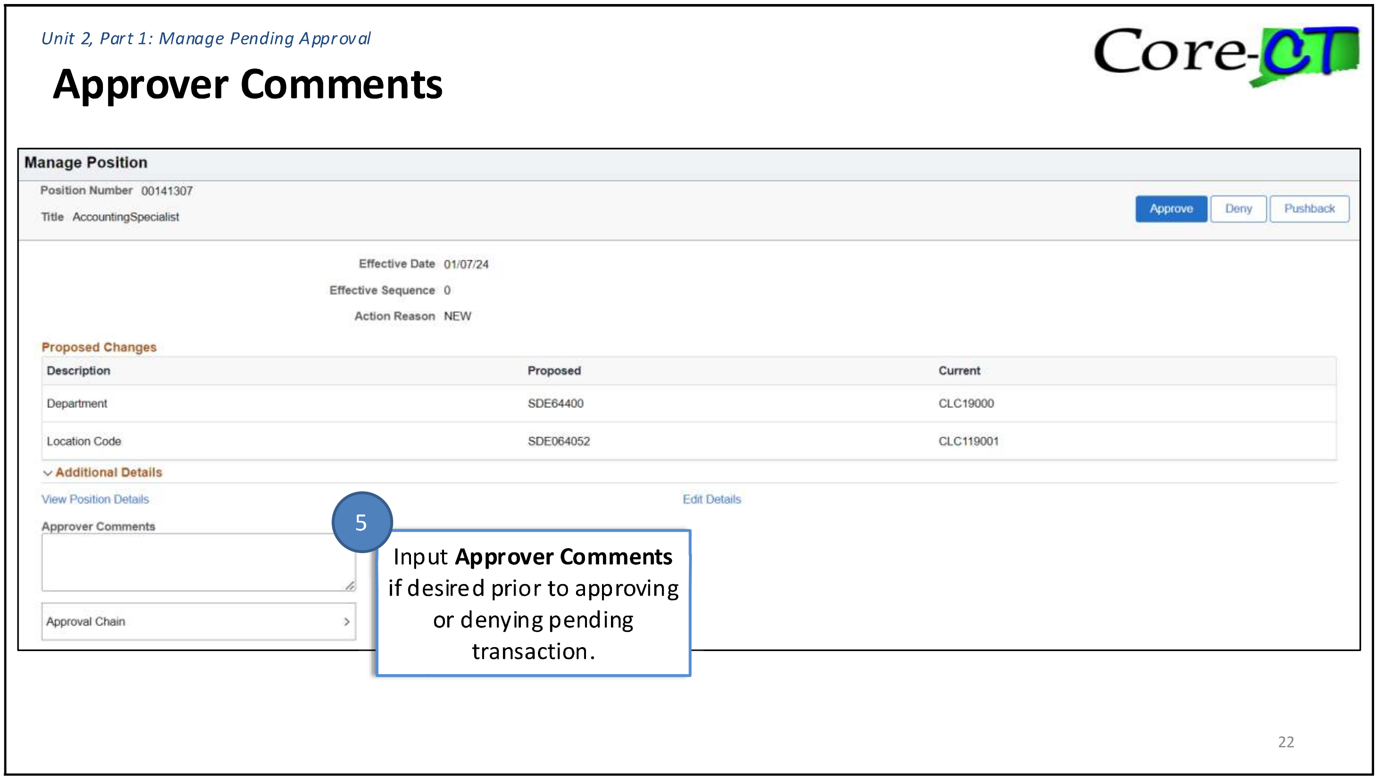
From the Core-CT HRMS page, select the Workforce Administrator tile and then select the Approvals tile. As discussed earlier, you'll notice that the tile shows the total number of approvals in the lower right hand corner.

Pending Approvals

Displays the pending positions



Clicking the approval tile will bring the user to pending approvals page. From here, users will be able to select which position transaction they would like to open by selecting the right arrow.

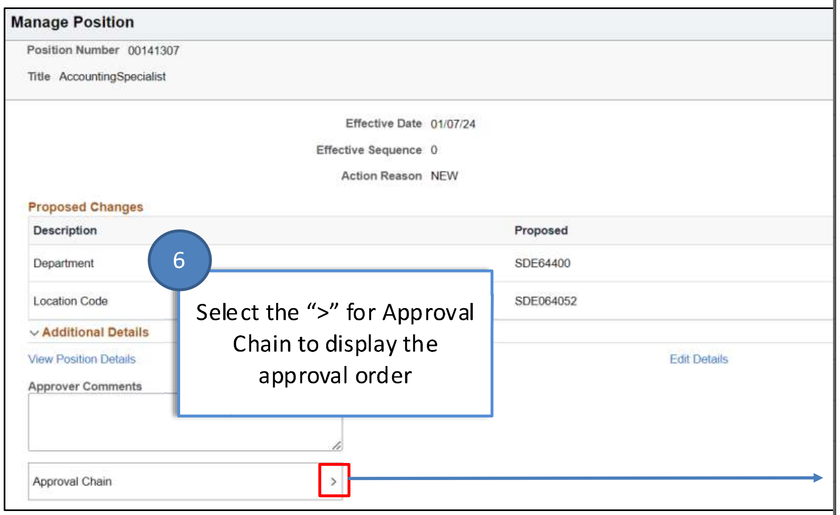


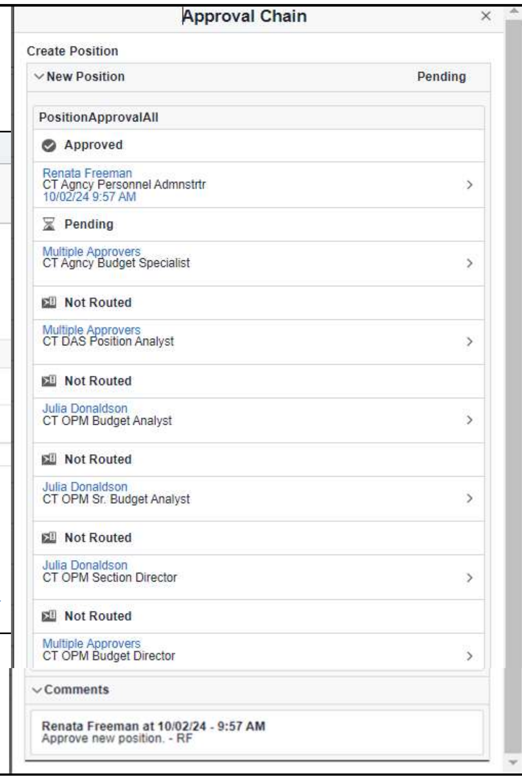
Once a position is selected, the Manage Position page will open for further details. This page indicates the specific fields that were changed on the pending transaction. In this example, the department and location code were changed.

You'll notice the Approver Comments box highlighted with the #5 in this screenshot. This is where the approver should enter any comments they wish before taking action on the position. These comments will then appear on the Approval Chain along with a timestamp of when the approval was entered. As a reminder, there is no longer a Position Approval tab – the Approval Chain replaces that tab in the new system. There is not another place for the approver to add a comment.

Unit 2, Part 1: Manage Pending Approval

Approval Chain

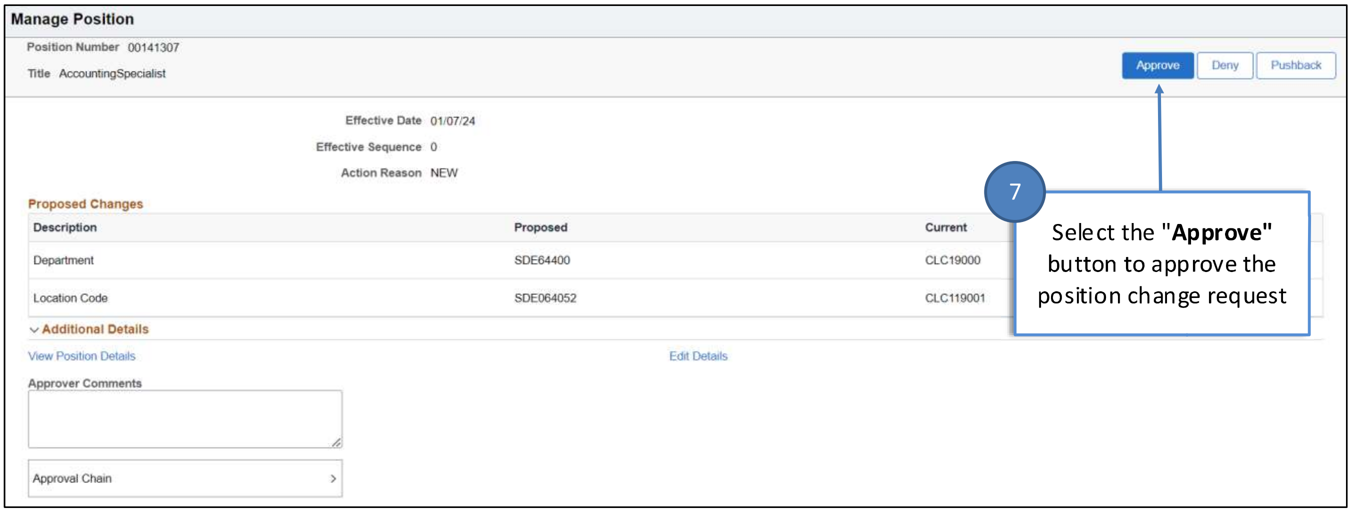




To view the Approval Chain for this position, click on the right arrow highlighted as #6 on this screenshot. As an approver, you can see who has already approved this transaction, along with their comments at the bottom. In this example, the Agency Personnel Administrator has approved the transaction, and it is currently pending with the Agency Budget Specialist. For approver roles with multiple people in that role for the agency, you'll see "Multiple Approvers" above the role name; otherwise, the approver's name is listed right on the Approval Chain.

Unit 2, Part 1: Manage Pending Approval

Approve Position



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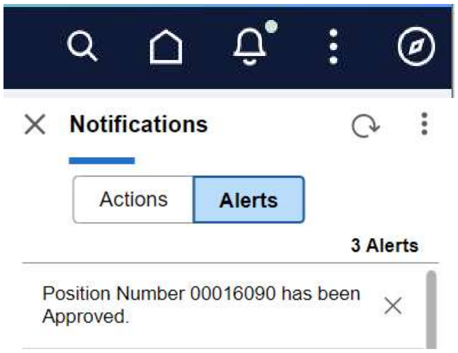
Once all information is included or reviewed, select Approve.

Approver Comments & Submit

Enter in the reasoning for approval in the **Approver Comments** section.

After clicking Approve, the Approver Comments box seen earlier from the Manage Position page will pop up, giving the approver another opportunity to enter or revise their comments before the position continues on to the next approver.



3

Once the position has been approved by all required approvers, the originator will receive an alert on their homepage.

4

The originator can then navigate through the Position Management tile to view the position, which will show an Approval Status of "Approved."

1 row

Effective Date	Eff Seq	Reason	Business Unit	Department	Job Code	Location	Approval Status	Position Status	Status as of Effective Date	Approval Chain
12/01/2023	0	Position Reclassification	AGNCY	DDS50300	5662HN	DDS130740	Approved	Approved	Active	Approval Chain

26

Once the position is approved by all required approvers, the originator will receive an alert on their homepage indicated by a green dot next to the bell icon. The originator can navigate via the Position Management tile to view the approved action. Notice there is a link to the Approval Chain from this view of the position as well.

Questions

- Post questions within the chat

At this time I will pause for questions. Please post your questions within the chat.

Unit 2: Pushback Pending Approval

The instructor will now provide a walk-through of how-to pushback a pending position approval transaction.

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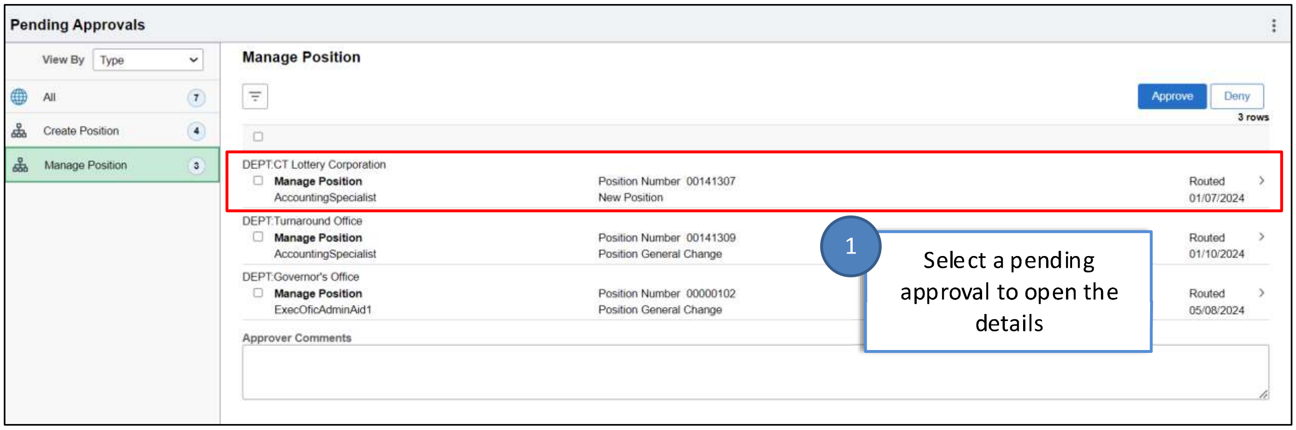
Now we'll take a look at pushing back a pending position transaction.

Unit 2, Part 2: Pushback Pending Approval

Pending Approvals

Displays the pending positions

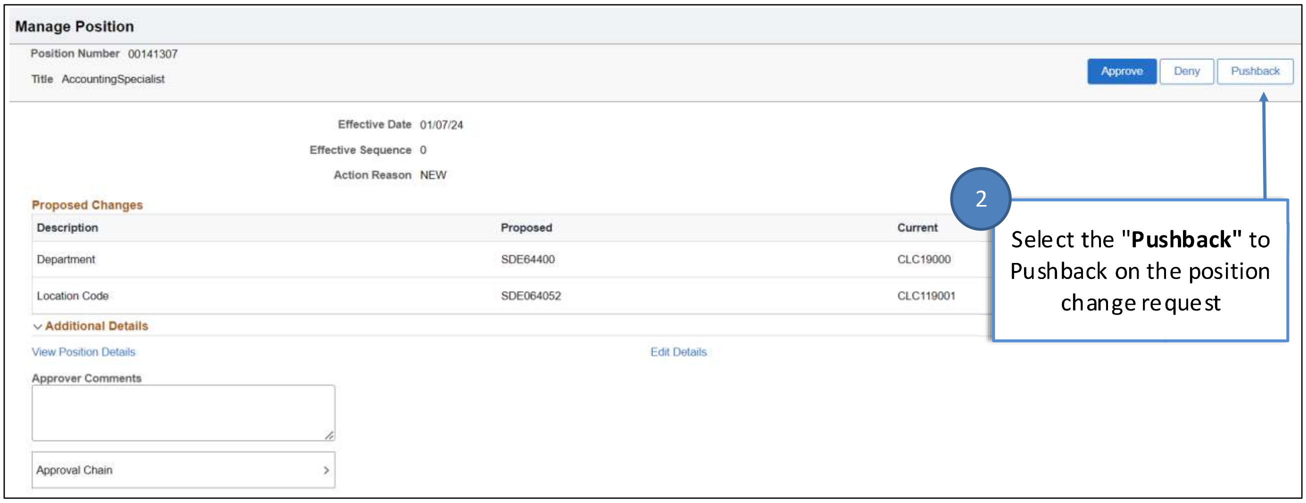


29

The navigation and most steps are exactly the same as approving a position. Select the position you need to take action on from the Pending Approvals page, accessed through the Approvals tile.

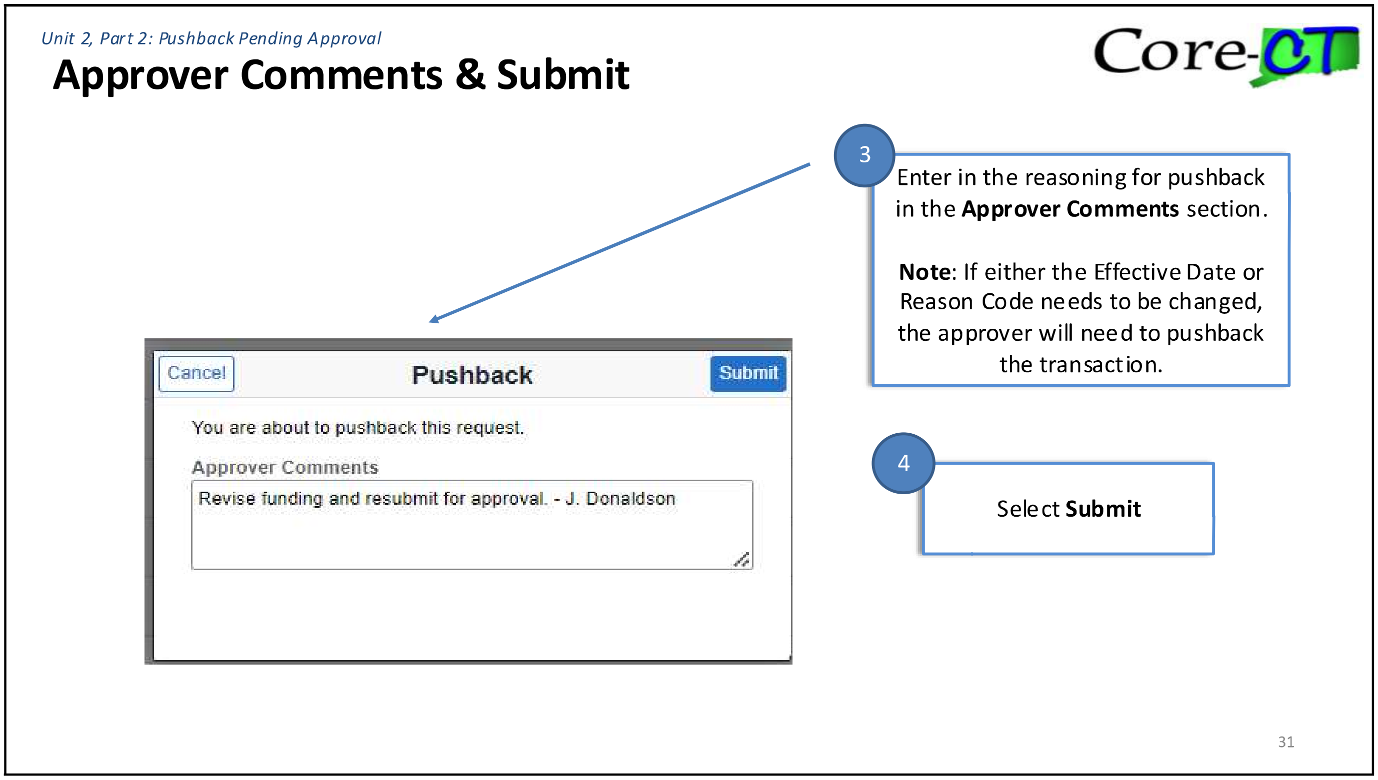
Unit 2, Part 2: Pushback Pending Approval

Pushback Position



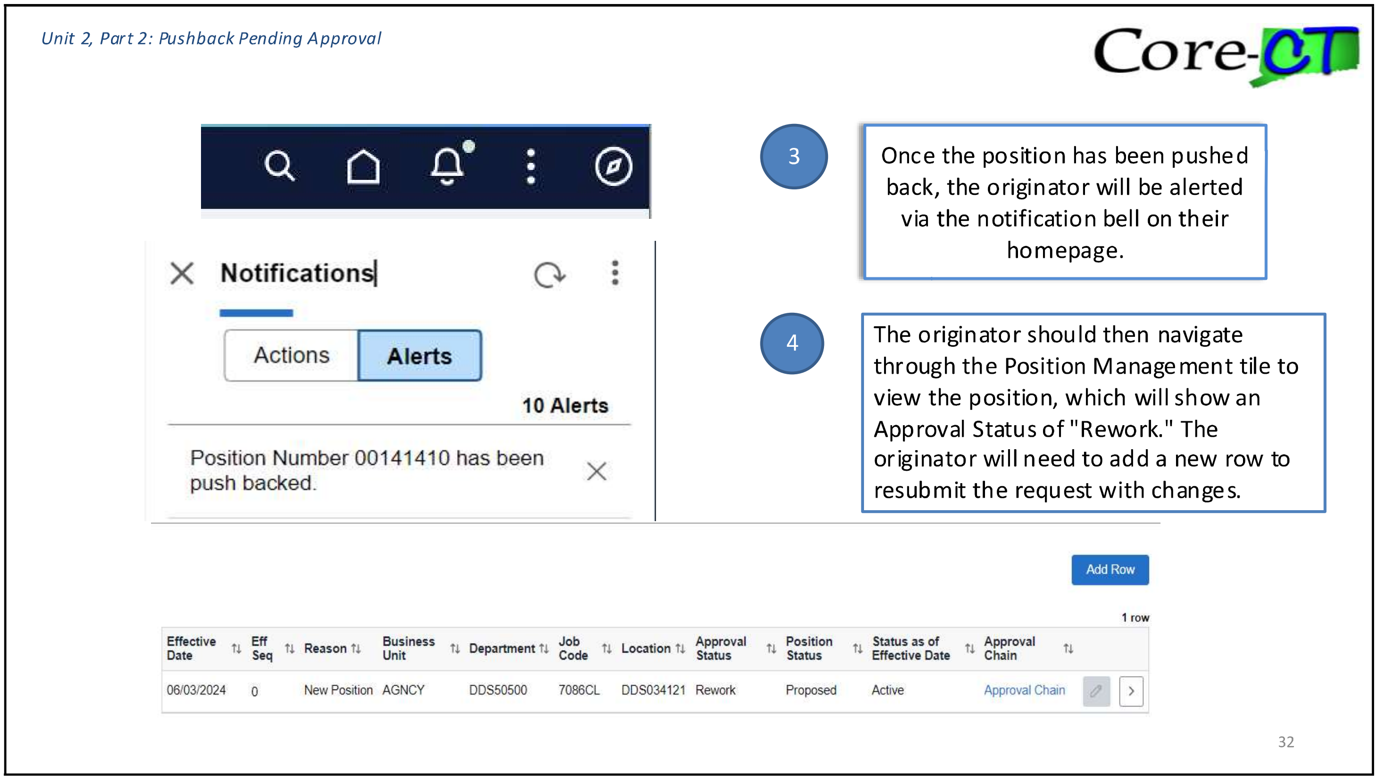
30

If you find the position requires addiitonal information or revision before it can be approved, select the Pushback button. You may add comments from this screen in the Approver Comments box, or you'll prompted again after clicking Pushback, as we'll see on the next slide.



This is the pop for comments that will appear after selecting Pushback. Be sure to add comments in the Approver Comments box so that the originator knows what revisions are needed before resubmitting the position for approval. Of note, since approvers can no longer modify the Effective Date or Reason code, if either of these fields needs to be changed, the approver will need to push back the transaction. Once comments are added, select Submit.

As a reminder, an approver can pushback a pending transaction to question the purpose, accuracy, or incompleteness of the request and then it **Returns the transaction to the originator, they will then have to review, update if necessary and resubmit.**



Once the position is pushed back, the originator will receive an alert on their homepage indicated by a green dot next to the bell icon.

Unit 2: Deny Pending Approval

The instructor will now provide a walk-though of how-to deny a pending position transaction.

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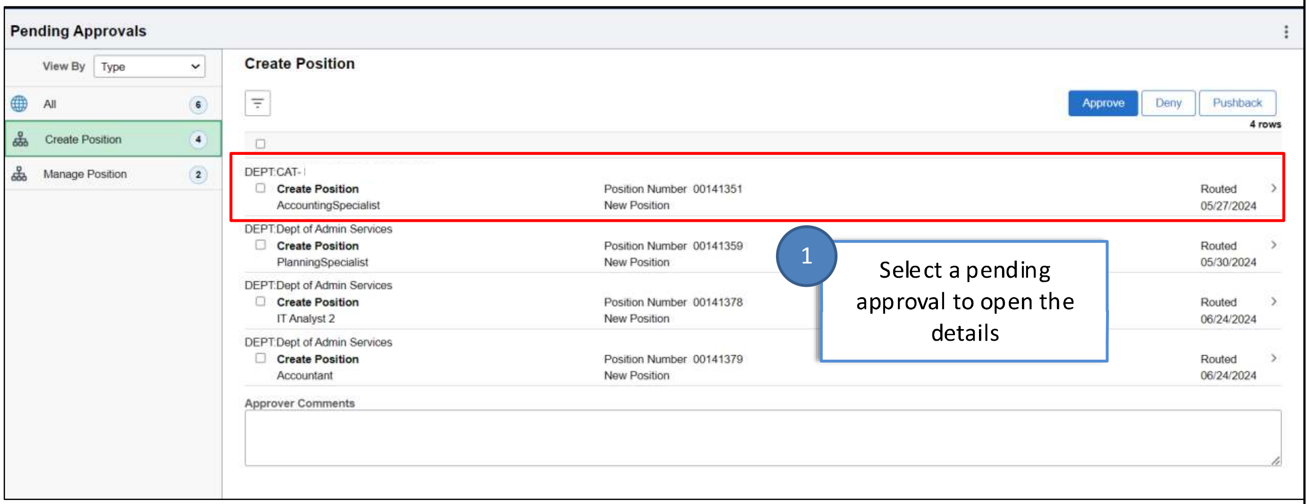
Our final example will show how to deny a position request.

Pending Approvals

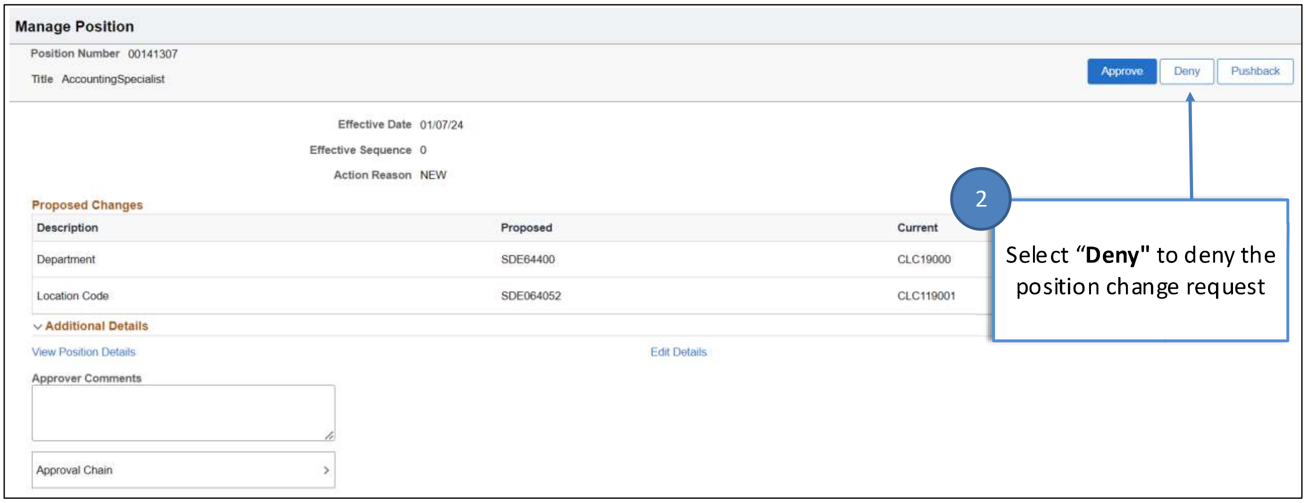
Displays the pending positions



34

Navigate to the Pending Approvals page through the Approvals tile and select the position to take action on.

Deny Position



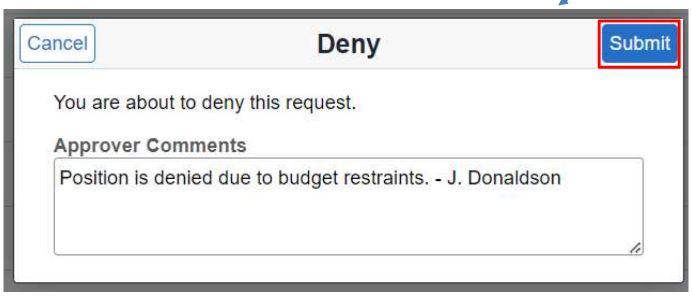
Select the "Deny" button.

Unit 2, Part 3: Deny Pending Approval

Approver Comments & Submit

3

Enter in the reasoning for denial in the **Approver Comments** section.

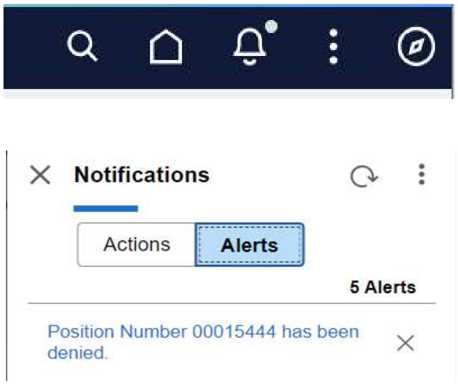


4

Select **Submit**

36

Once deny is selected, a pop up window will display. Comments should include why the position is being denied. Any comments entered on the prior screen will appear here – review and edit if necessary. Once comments are added, select Submit.



3

Once the position has been denied, the originator will be alerted via the notification bell on their homepage.

4

Navigate through the Position Management tile to view the transaction, which will show an Approval Status of "Denied" and a Position Status of "Rejected."

1 row

Effective Date	Eff Seq	Reason	Business Unit	Department	Job Code	Location	Approval Status	Position Status	Status as of Effective Date	Approval Chain
09/01/2024	0	Position Reclassification	AGNCY	DDS50100	6587FP	DDS064511	Denied	Rejected	Active	Approval Chain

37

Once the position is denied, the originator will receive an alert on their homepage indicated by a green dot next to the bell icon. The originator can then navigate through the Position Management tile to view the denied transaction. The Approval Status will show as "Denied" and the Position Status as "Rejected."

Summary Review

Let's review our Learning Objectives:

You should now be able to:

- Access the approval tile, and Position Approval fluid pages (i.e., Position Approval Page)
- Locate, manage and view pending approvals
- Enable a Position Pushback
- Understand how to Approve and Deny a Transaction
- Review Approval Chain

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

- ✓ *Access the approval tile, and Position Approval fluid pages*
- ✓ *Manage and view pending approvals*
- ✓ *Push back a position if more information or revision is required*
- ✓ *Approve or Deny a pending transaction*
- ✓ *View and understand the Approval Chain*

Questions

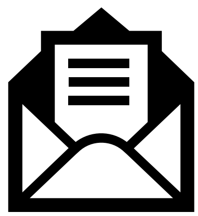
- Post questions within the chat

If anyone has questions, please post them in the chat.

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 Position Approval course!

1. Complete the Training Evaluation.
   Position Approval Survey (surveymonkey.com)

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)