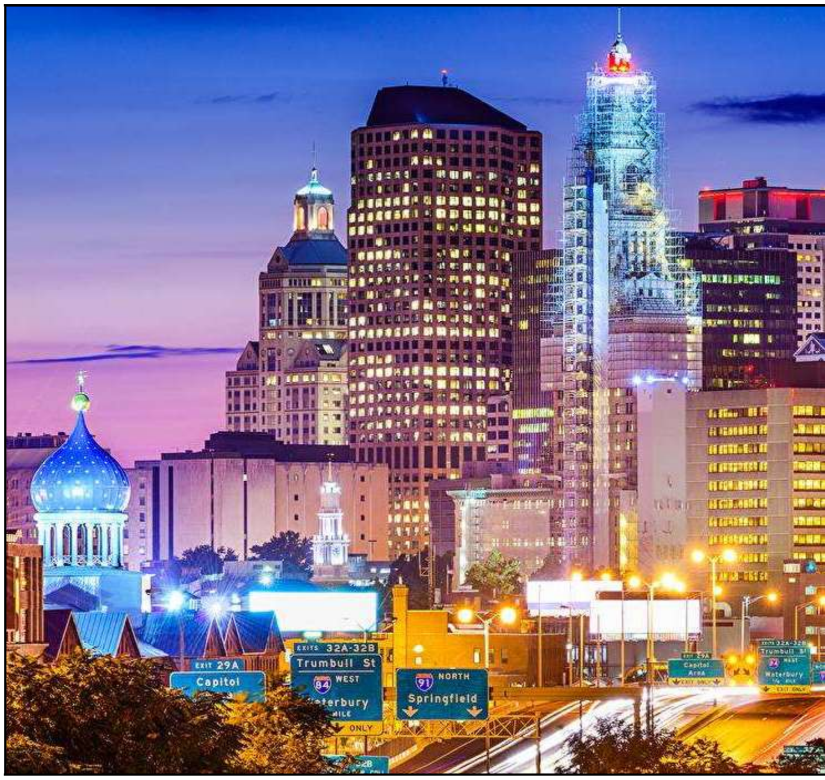


Core-CT

Position Management

Core-CT

October 2024

Good morning, everyone, and welcome to the Position Management L200 course. My name is Rose Jensen and I am the Principal HR Specialist with the Core-CT HR team. Today we'll be reviewing the changes to Position Data that are coming with the upgrade. There are some significant changes to the functionality, look, and feel of Position Data that we will explore today.

Course Intro

Welcome to the Position Management L200 Course

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

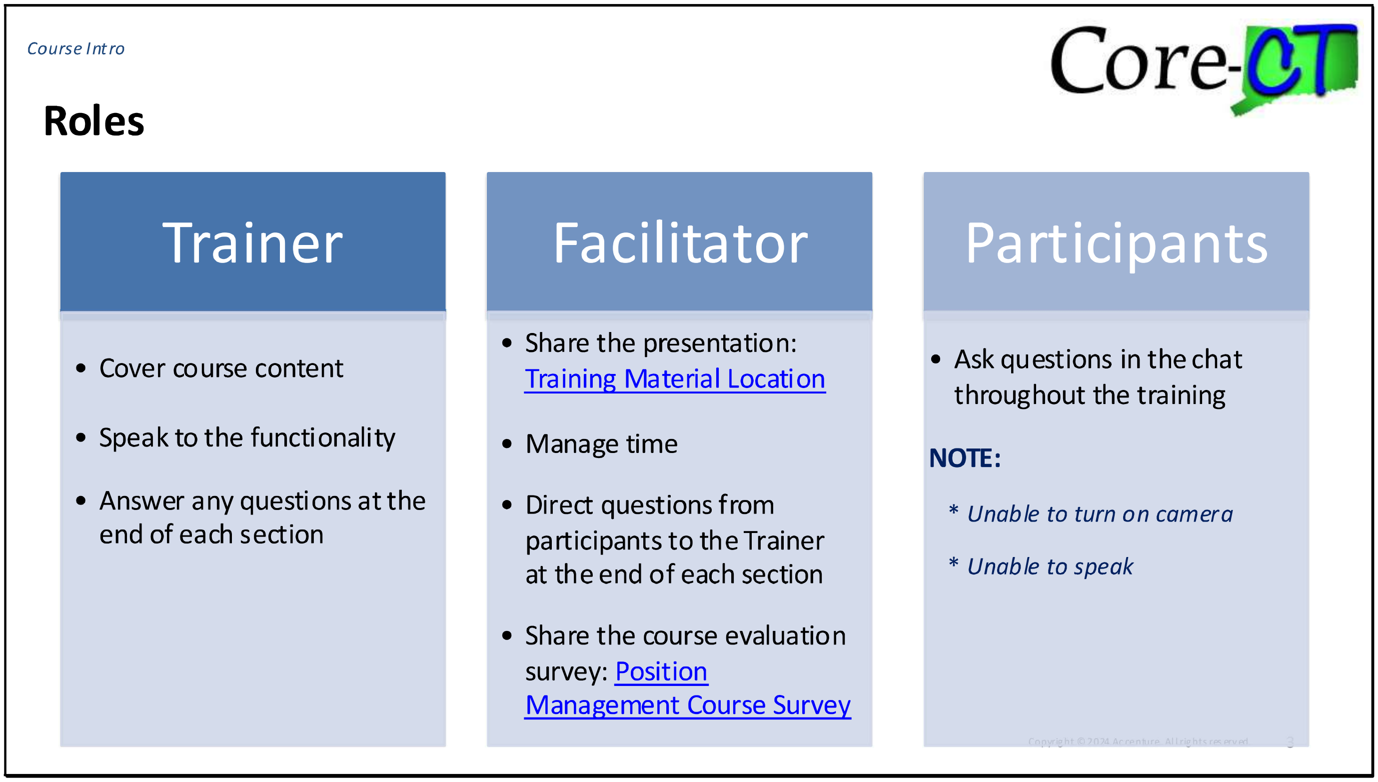
Some guidelines for today's class:

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

 2

In this course we will be covering the new upgrades to PeopleSoft and how they will affect Position Management processes.

We ask that during this course you remain engaged by asking questions. I will be pausing several times throughout the presentation to for questions.



This webinar functions a bit differently than the Teams meetings you may be used to. Here is a brief overview of 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 any questions at the end of each section

We also have a separate Facilitator who is:

- Sharing the presentation and managing time

- The facilitator will also direct questions from participants to the Trainer 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 camera or 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. Alternatively, you can email readiness@ct.gov, who will be assembling a Q & A to be posted after the class.

Today's Agenda

Section
Course Overview and Objectives
User Interface Changes
Q&A
Unit 1: Creating Positions
Q&A
Unit 2: Modifying Positions
Q&A
Review and Q&A

Here is a glimpse at the schedule for today's training . The presentation itself will take under an hour, but we have built in extra time for questions, which as I mentioned, we will address in several designated breaks.

Course Intro

Course Overview and Objectives

Present the overview of changes, learning objectives, and key terminologies of Position Management.

System changes resulting from the PUM 9.2 48 upgrade include:

- Position Data Navigation
- Manage/Create Position Steps
- New Activity Guided Process
- Cloning a Position

Here are the some of the specific items we'll be looking at today. Some of the changes due to the PUM Upgrade are:

A New User Interface

- A New Navigation for Position Data
- Changes to the steps for Managing and Creating Positions
- A New Activity Guide Process
- The "clone" position feature, which replaces the "initialize" function available today

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.

This is a list of terms that you may not be familiar with but I will be using these terms 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 activities.
- **Guided Process, also referred to as an Activity Guide**: 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 more manageable steps.
- **Tiles**: A shortcut button that helps you quickly get to important tasks or information without searching through menus.

User Interface Changes

L200 – Position Management

Now we will dive into the User Interface Changes

User Interface Changes

In this unit we will explore the process of navigation through:

1. The Workforce Administration Homepage
2. The Manage Positions and Administer Positions tiles.
3. The Position Management Activity Guide
4. Approvals

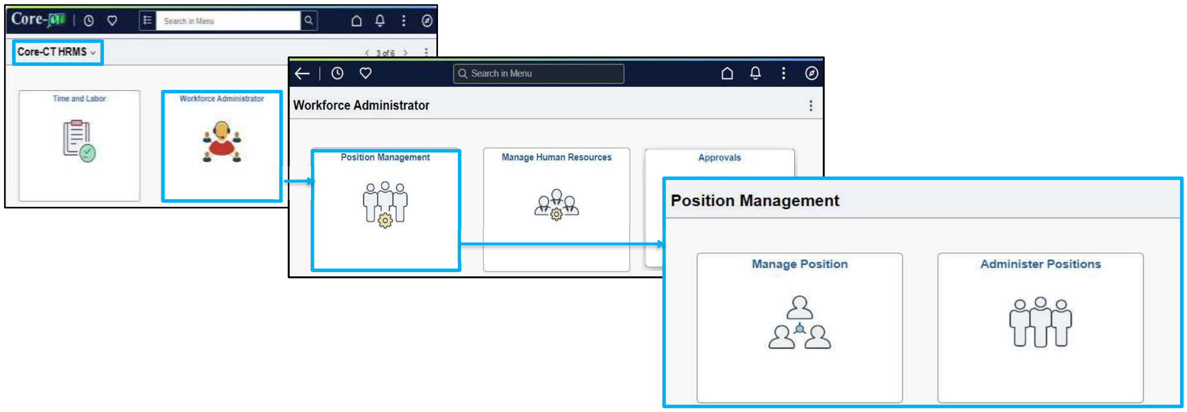
We will be looking at

- Navigation : how to get around and the different navigation paths.
- The Manage Position and Administer Position Tiles: what they look like and what they do.
- The New Position Management Activity Guide
- And then, we'll do a brief touch on Approvals. As you may know, there is a separate L200 training course available later this month dedicated to discussing the position approval process in more detail.

User Interface Changes

Manage Position and Administer Position Tiles

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



***Manage Position* Tile:**
- Create & Update Position Data
- View Pending Position Approvals

* see *Position Approvals Course* for additional details

***Administer Positions* Tile:**
- Read Only Capabilities
- Provides a Summary View of current position data and history

 10

To get to Position Data in the upgraded Core system, you will navigate as follows:

1. Start at the **Core-CT HRMS** homepage, which can be found as a drop-down option in the upper left once you sign in, and then click on **the Workforce Administrator tile**.
2. From there we will click on the Position Management tile, which brings us to the Position Management Homepage.

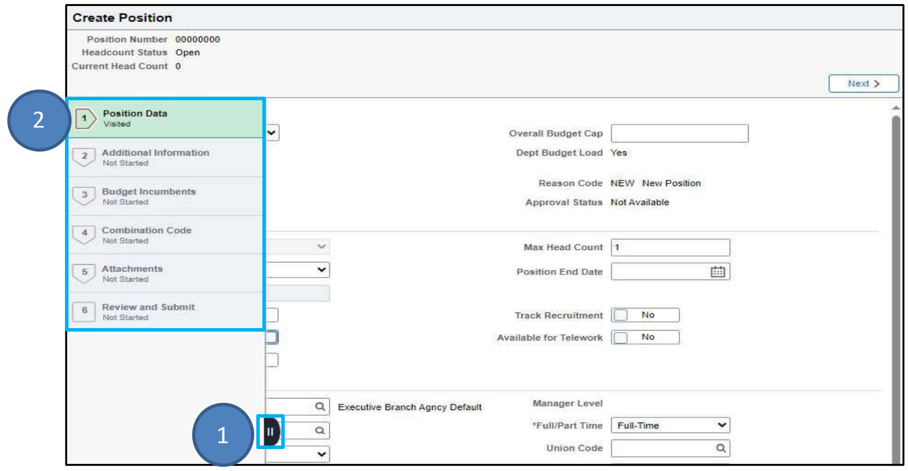
You'll note that the Position Management Homepage consists of two tiles:

- The **Manage Position Tile** is the critical tile used for both creating and updating position data. This essentially replaces the Add/Update Position Info page in today's system.
- The **Administer Positions Tile** can be used to either view a summary of all changes on a single position, or see the history of the incumbents of a given position. These pages are read-only so you can not make changes here.

Position Management Activity Guide

The Activity Guide is a new easy-to-follow process to ensure all necessary steps and information have been completed when creating a new position or updating existing position data. Each Step will indicate whether it's been **Visited, Not Started,** or **Completed**.

Key Steps	
1	Click the **Tab** to view the Guided Process Steps.
2	Review the steps in the process. *Note: You can't move forward until the ***required** steps are complete*



 11

One of the major changes with the upgrade is the introduction of the Position Management Activity Guide. This is a new easy-to-follow process meant to help the user ensure all necessary information has been entered when creating a new position or updating existing position data. The Activity Guide is located on the left hand side of the page. You'll notice that the names of the tabs are very similar to the tabs in the current system's Position Data that you are familiar with. However, the tabs are now oriented vertically instead of across the top of the page.

Each Step will indicate if its has been

- **Visited**
- **Not Started**
- **Completed**

- **In this example, only the first tab (called Position Data) has been visited.**
- *It is important to note that you cannot move forward to the next tab of the Activity Guide until all ***required** steps, marked with an asterik, are complete.*

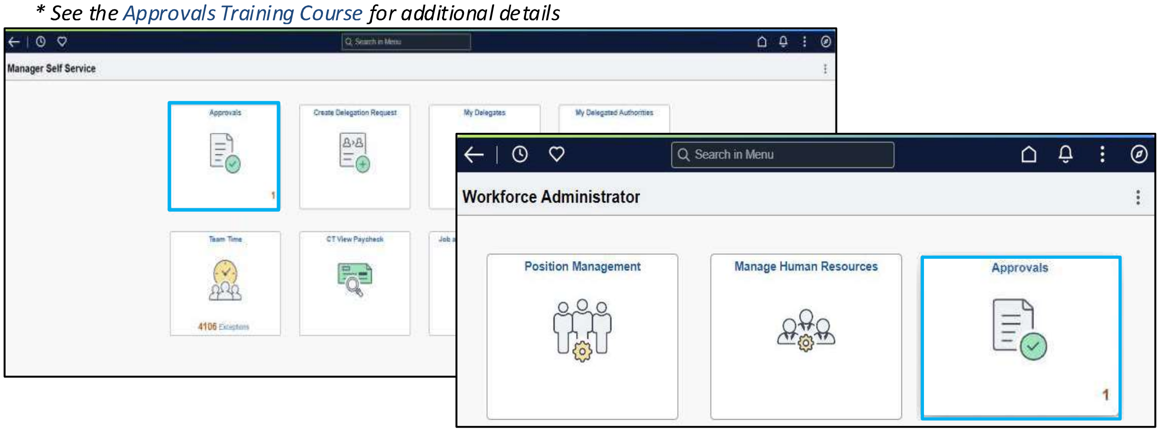
User Interface Changes

Additional Key Information: Approvals

Approvals will no longer be accessed through the user's worklist.

Approvals will now be accessed via the **Approvals** tile located on the Manager Self-Service homepage and the Workforce Administrator Homepage

** See the Approvals Training Course for additional details*



 12

Another major change is that position approvals will no longer exist on the position management pages. Instead, approvals will now be accessed via the Approvals tile, which is located on both the Workforce Administrator Homepage and the Manager Self-Service homepage.

- This means pending positions will no longer be accessed through the user's worklist.
- As I mentioned earlier, the Position Approvals L200 Training Course will explore the approval process in greater detail.

***At this time we'll pause. Does anyone have questions on User Interface Changes? ***

Unit I: Creating Positions

L200 – Position Management

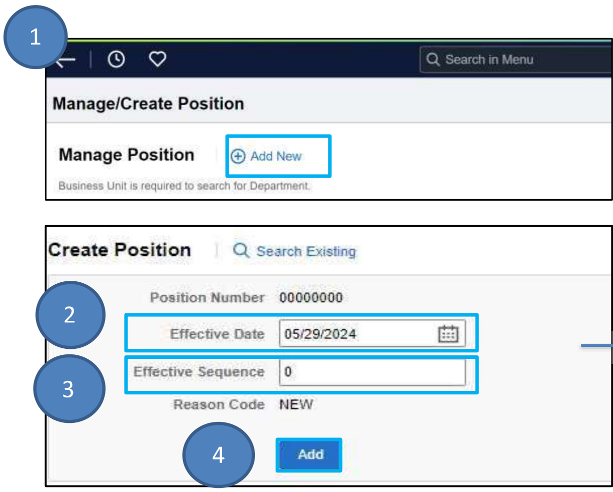
Next we will discuss Creating Positions.

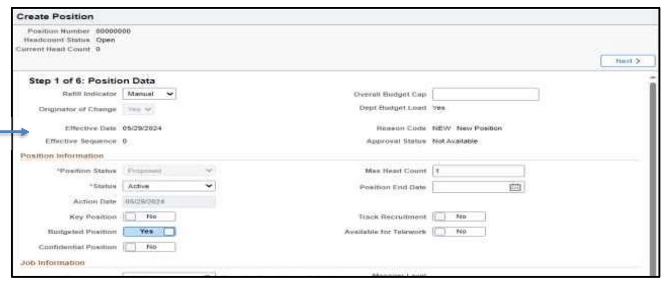
Unit 1: Creating Positions

Create a New Position

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

Key Steps	
1.	Click the "**Add New**" link to create a new position.
2.	The **Effective Date** will pre-populate (*You can't change the effective date after the activity guide has started*)
3.	The **Sequence Date** will default to "0"
4.	Click **Add** to continue to the next **Create Position Page**





 14

To Create a new Position, you will need to navigate to the Manage Position tile.

***That Navigation path is** : Core-CT HRMS Homepage > Workforce Administrator > Position Management > Manage Position*

- Highlighted as Item # 1 here is the "Add New" link on the Manage Position page. You'll click that link, and see that the effective date will pre-populate with today's date. This must be changed on this screen, before proceeding, as once you start the Activity Guide, you can no longer change the effective date.
- The Effective Sequence will default to "0."
    - Just like today, if, after this establishment is approved, there are additional actions on the same effective date, the sequence would need to be changed to '1' and so on.
- The Reason Code will show as "NEW." This cannot be changed for new positions. However, as we'll discuss in the Position Approvals course, approvers do not need to add a new row when approving Positions transactions, so there will be no need for them to change this Reason code to "EST" as they do today.
- You'll note the Position Number field appears with all zeros. Just as in today's Position Data, the system will automatically assign a position number after the

request is submitted, so this field cannot be overridden.

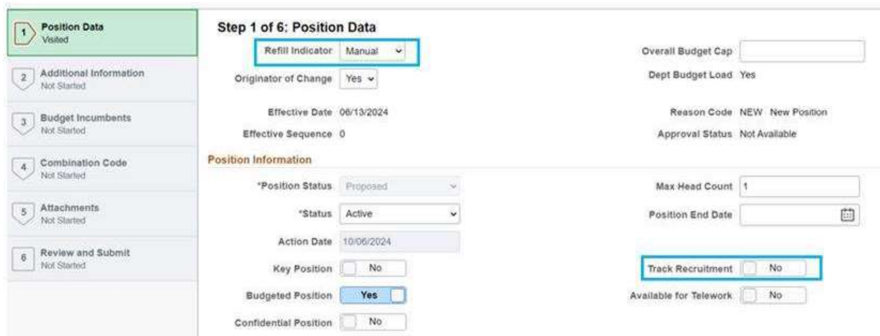
- Once you've confirmed the effective date is correct, click the “Add” button to proceed to the Activity Guide.

Position Management Activity Guide

Step 1: Position Data

1. Select from the **Refill Indicator** options.

Note: Track Recruitment is now available in Position Information section



The 1st step in the guided process is the **Position Data tab:**

The very first field on this tab is the Refill Indicator, which will default to Manual. Be sure to change this to Six Month or Auto in order to hire or transfer an employee into this position after approval.

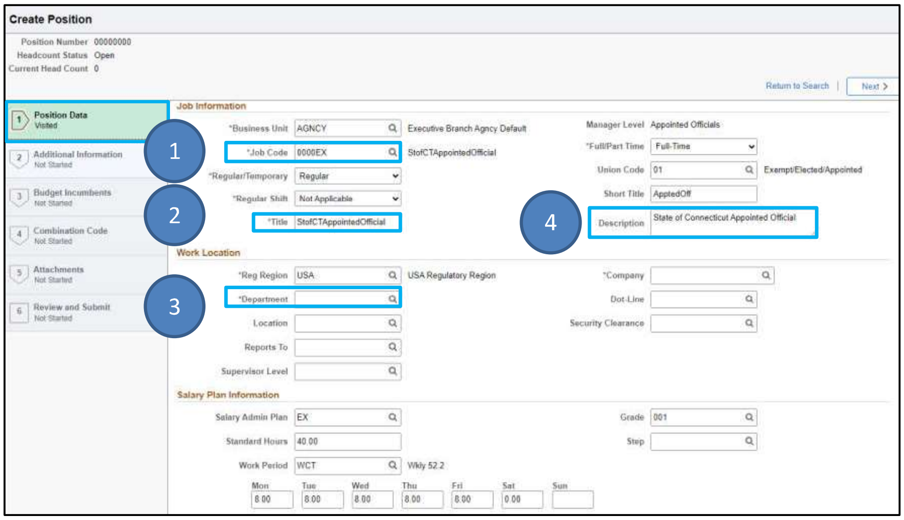
Please note also that the Track Recruitment checkbox is now available in the Position Information section, as you can see in the screenshot, instead of the Additional Information tab where it is housed today.

Position Management Activity Guide

Step 1: Position Data

Key Steps	
1.	Enter the ***Job Code**. The lookup option can be utilized if needed.
2.	***Title** will automatically populate once the job code is entered.
3.	Select a ***Department** using the lookup.
4.	Enter the position justification into the **Description** field.

***required field**



Next, we'll proceed through the rest of the Position Data tab. Job Code and Department are required fields, just as they are today, and are marked with an asterisk on the Activity Guide.

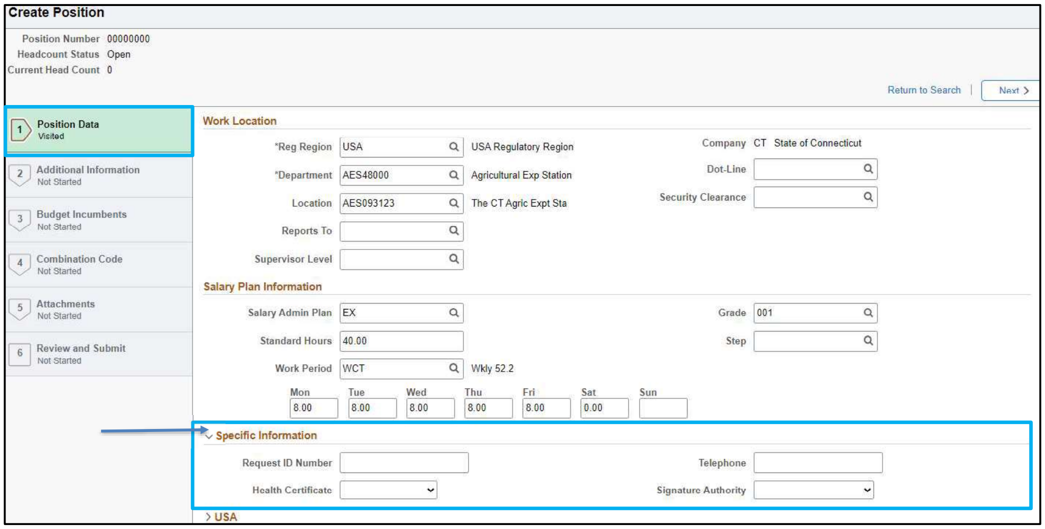
- To enter the **Job Code**, you can either click the magnifying glass to use the lookup screen, or you can manually type in the job code.
- Once you select a job code, many of the other fields will populate, including Title, Salary Plan Information, Union Code, and Standard Hours.
- You must also elect a **Department. C**lick the magnifying glass to use the look up function, or enter it manually. Be sure to adjust the location code if it is different than the default associated with the Department.

Indicated with the number 4 above is the Description, which replaces the Detailed Position Description link you are familiar with. Here is where you'll enter in the position justification. While this no longer opens into a separate pop-up, the box is expandable by clicking and dragging the bottom right corner of the box, so you will be able to enter the full justification as needed here.

Position Management Activity Guide

Step 1: Position Data

2. Many of the ***Specific Information*** details will now be consolidated into the **Position Data** tab**,** instead of its own tab.



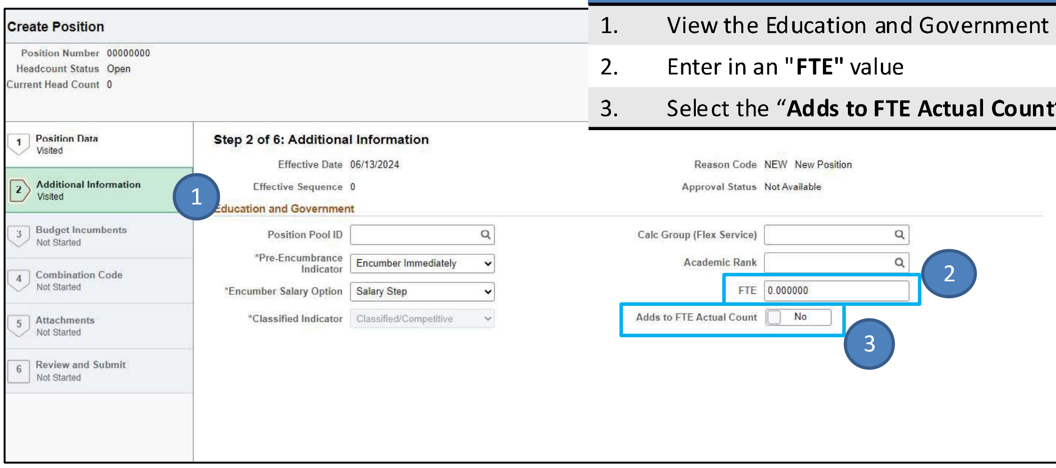
The slide highlights that some of the fields currently on the Specific Information tab today are now consolidated onto the Position Data tab.

Once you're ready to move to the next tab of the Activity Guide, you can either click directly on the next tab, in this case "Additional Information," or you can click the "Next" button in the upper right.

Position Management Activity Guide

Step 2: Additional Information

Key Steps	
1.	View the Education and Government section
2.	Enter in an "**FTE**" value
3.	Select the "**Adds to FTE Actual Count**" (If applicable)



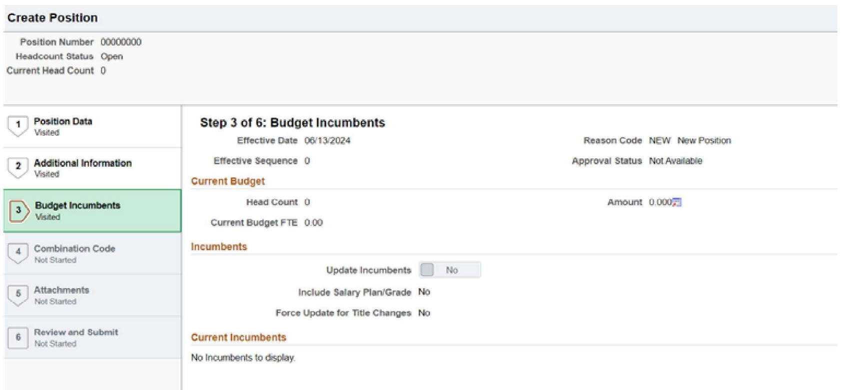
The **Education and Government** section, currently in the Specific Information tab, will now be within the **Additional Information tab.**

Here is where you will:

- Enter in the **FTE value**
- Select the " **Adds to FTE actual Count**" if applicable.

Position Management Activity Guide

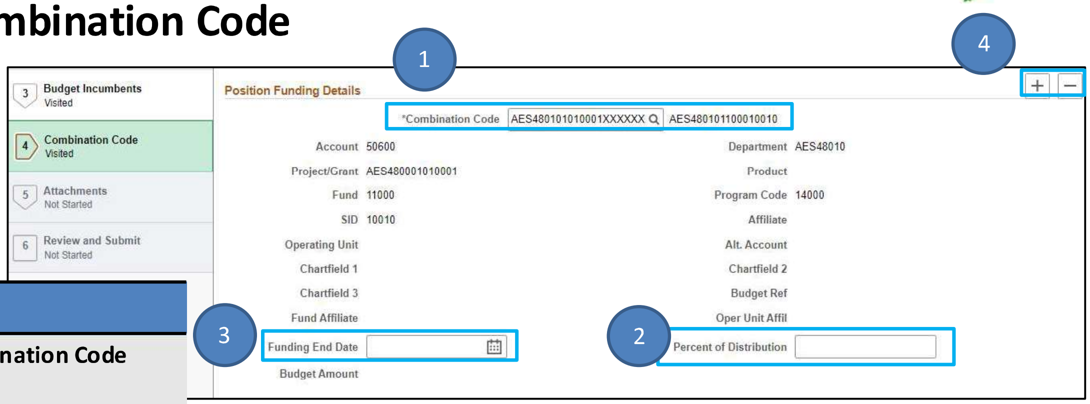
Budget Incumbents



No information needs to be entered on the Budget Incumbents tab. Once you have hired someone into the position, their name and employee number will populate here.

The next tab of the Activity Guide is the Budget Incumbents tab. There's no need to enter information here as you're creating a new position, but once an employee is hired, this page will populate with their name, employee ID, and employee record. It will also contain a direct link to the incumbent's Job Data record, just as this tab provides today.

Step 4: Combination Code



Key Steps
1. Select the ***Combination Code** using the lookup.
2. Enter in the **Percent of Distribution**.
3. Enter in a **Funding End Date**, if applicable.
4. Add or remove Combination Codes, if applicable.

The fourth tab is where you'll enter the funding information for this position.

1. Select the **combination code** by either using the lookup to search by certain chartfields, or paste in the combo code in full if you have it available.

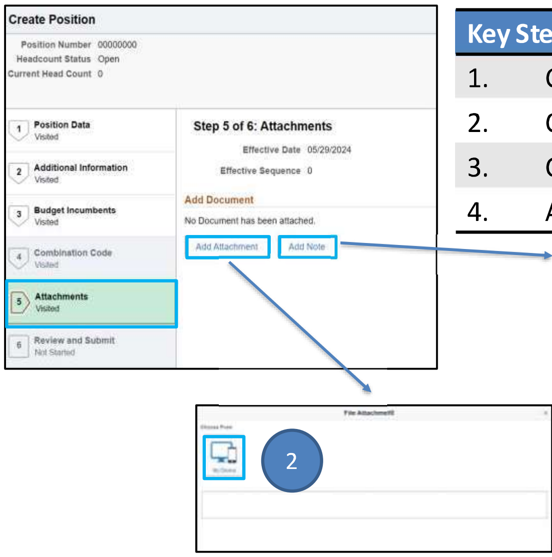
2. Enter a percentage into the **Percent of Distribution** field. Whether the position is single or split funded, the percentage here must equal 100 to proceed.

3. If there is a **Funding End Date**, you will select it using the calendar icon or by manually entering it.

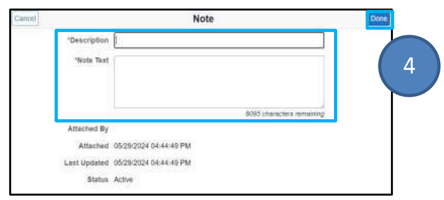
4. If you need to add or remove another **Combination Code**, click the **+/-** sign button in the upper right hand corner.

Position Management Activity Guide

Step 5: Attachments



Key Steps	
1.	Click the **Add Attachment** button to add a document.
2.	Click the **My Device** button to select a document to upload.
3.	Click the **Add Note** button to add a note.
4.	Add in the **Description and Note Text**, and then click **done**.



 21

A brand-new feature in Position Data is the ability to add Attachments whenever you create or update an existing position. This is its own tab.

To add an attachment , you will :

1. Click **the Add Attachment** button.

2, Click on **My Device** to select a file to upload. You'll be able to give it a unique description that all viewers to this position will be able to see.

Alternatively, you can add a Note on this page. To do so, you will :

3. Click the **Add Note** button,

4. Enter in **the Description** and **Note Text**, then click **done**.

Position Management Activity Guide

Step 6: Review and Submit

Key Steps	
1.	Review the **Key Information table** and confirm the position details
2.	Click the **Submit** button

 22

The last step of the Activity Guide is the **Review and Submit tab.**

This is your chance to look at the proposed changes. If you see that additional modifications are needed, you can navigate back to the appropriate tab to make changes before submitting.

1. **Review the Key Information table** and confirm the position details

2. Click the **Submit** button

Position Confirmation

Key Steps
1. View the confirmation of submitted position request.

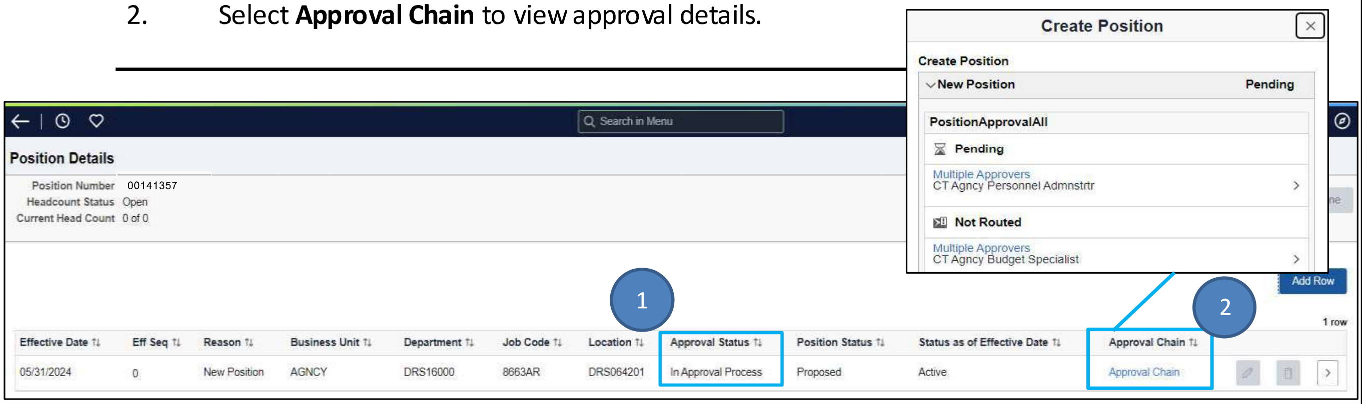
1

 23

After clicking Submit, the Position Confirmation screen will indicate that the request has been submitted for approval. If the position transaction requires approval, this page will display the list of approvals that are needed by role. The example shown here does not require approvals, so no approvers are listed.

Review Approval Status and Approval Chain

Key Steps	
1.	From the Position Details page, review the updated **Approval Status.**
2.	Select **Approval Chain** to view approval details.



After submitting the new position, you can navigate back to the Position Details page to view the Approval Status. This example is a new position that requires several steps of approval. You'll see indicated as #1 that the Approval Status is "In Approval Process."

You can also click the Approval Chain link, indicated with #2, to see the status of the approval. It's important to note that this replaces the Position Approval tab in the current system, where approvers write comments as they approve, deny, or recycle the position. The new Approval Chain will include the roles of each required approver, and you can click on the blue link to view the specific employee name and title of the person with that approval role for your agency. The Approval Chain is also where the approver comments will appear, as well as a timestamp of when the approval was made.

Now we'll pause to take questions. Please enter them into the chat.

Unit II: Modifying Positions

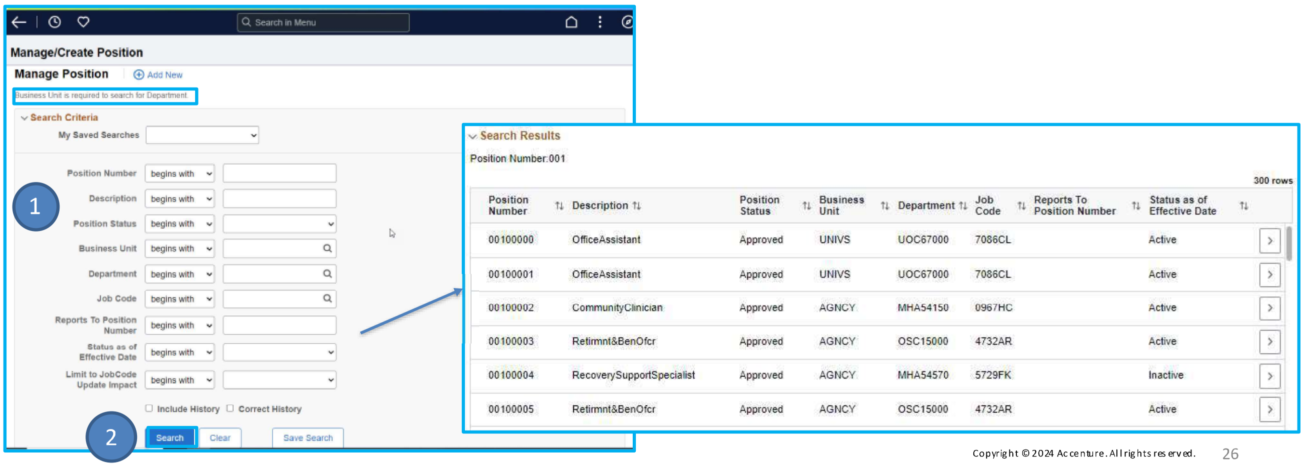
L200 – Position Management

Now we'll be moving on to discuss **Modifying Positions**

Manage Position Page

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

1. **Search** for an **already existing position**.
   - *If you prefer to search for a* ***Department****, you must first enter the* ***Business Unit******
2. Click the **Search** Button.



To modify an existing position, you will also need to navigate to the Manage Position tile.

1. Here, you'll search for an existing position by using any of the fields shown above. There are two key differences from today's search functionality:
   1. If you are searching for a specific position number, you will need to enter all 8 digits of the position, including leading zeroes.
   2. If you are searching by Department, you will also need to enter the Business Unit (AGNCY, UNIVS, etc)

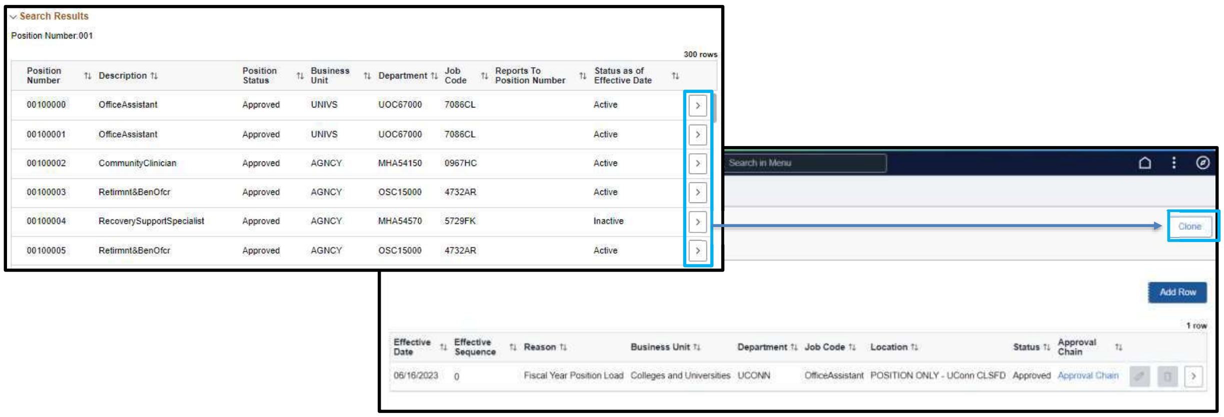
2. Once you've entered in your criteria, click the "**Search**" button

From the search results, **click the arrow** on the right hand side of the position you need to update. A nice new feature with the upgrade is that the Manage Position Search page will list the 5 positions you most recently searched so you don't need to re-enter the criteria if you need to access a position you recently viewed.

Cloning a Position

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

1. Click the **>** arrow to access the details of the selected Position
2. Click the **Clone** Button



Cloning a Position

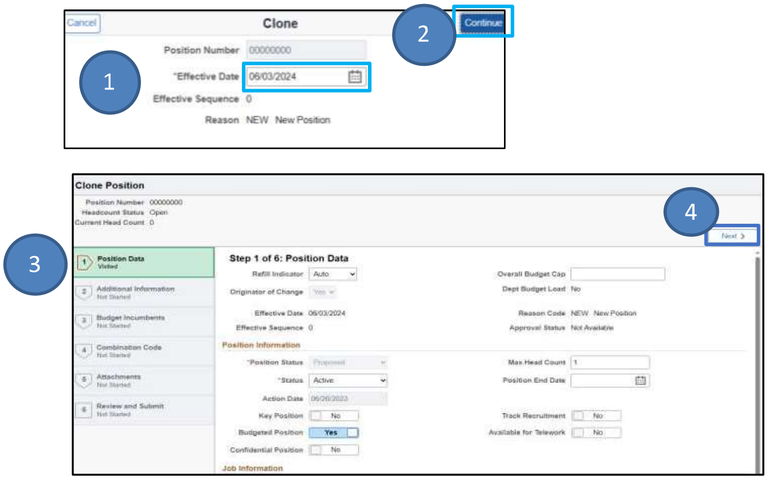
You will now be able to create a new position via cloning an existing, approved position. This allows users to create a new position with most of the fields pre-populated, which saves time. The Clone button replaces the "Initialize" feature that you may be familiar with today.

Navigation : *Core-CT HRMS> Workforce Administrator > Position Management >* ***Manage Position.*** *You will need to search for and identify an existing, approved position to start the clone process.*

1. Click the **>** arrow to access the details of the selected Position
2. Click the **Clone** Button to begin

Cloning a Position

Follow the same steps as *Create a Position*, when cloning an existing position.



Key Steps

1. Select an ***Effective Date.*** (*You can't change the effective date after the activity guide has started*).
2. Click the Continue button.
3. Make changes to the original cloned position, to tailor to the needs of the position being created.
4. Click the Next button to continue through the guided process steps.

***required field**

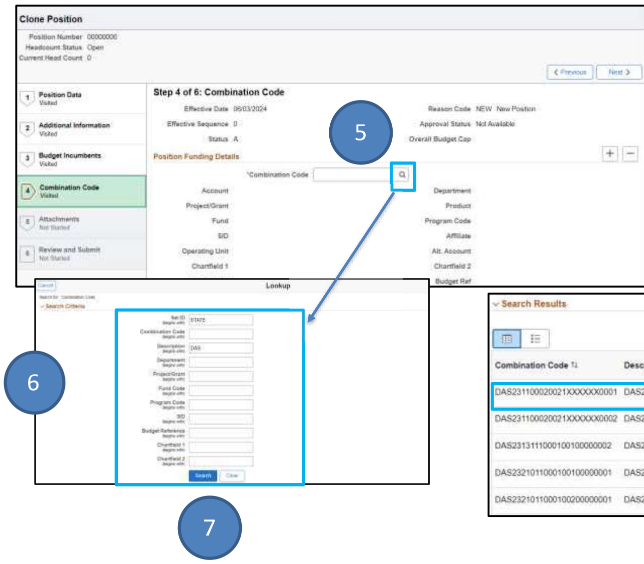
 28

Once the position has been cloned, you will follow the same steps as **Create a Position** and make changes where applicable. Just like with Creating a Position, you will need to visit each step of the activity guide, ensuring that all required fields are completed.

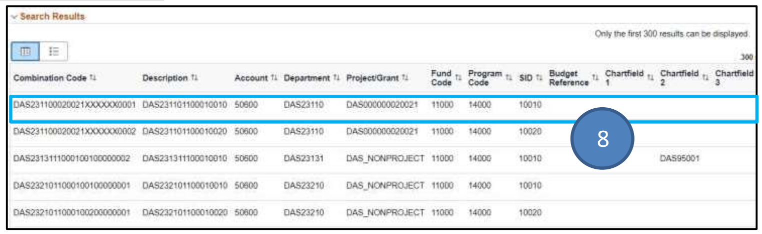
1. **Select an *Effective Date. (*You can't change the effective date after the activity guide has started*). The Reason code will populate with 'NEW.'**
2. Click the **Continue** button.
3. Once on the Activity Guide, you can make any needed changes to the original cloned positions. Note that key fields will already be populated, including the job code and department.
4. Click the **Next** button to continue through the guided process steps.

Cloning a Position – Combination Code

Combination code will need to be selected when cloning a position



Key Steps	
5.	Click the **Magnifying Glass** to lookup a combination code
6.	Enter in **search criteria** to help narrow the search**.**
7.	Click the **Search** button.
8.	Click the **Line** of the combination code you want to select.



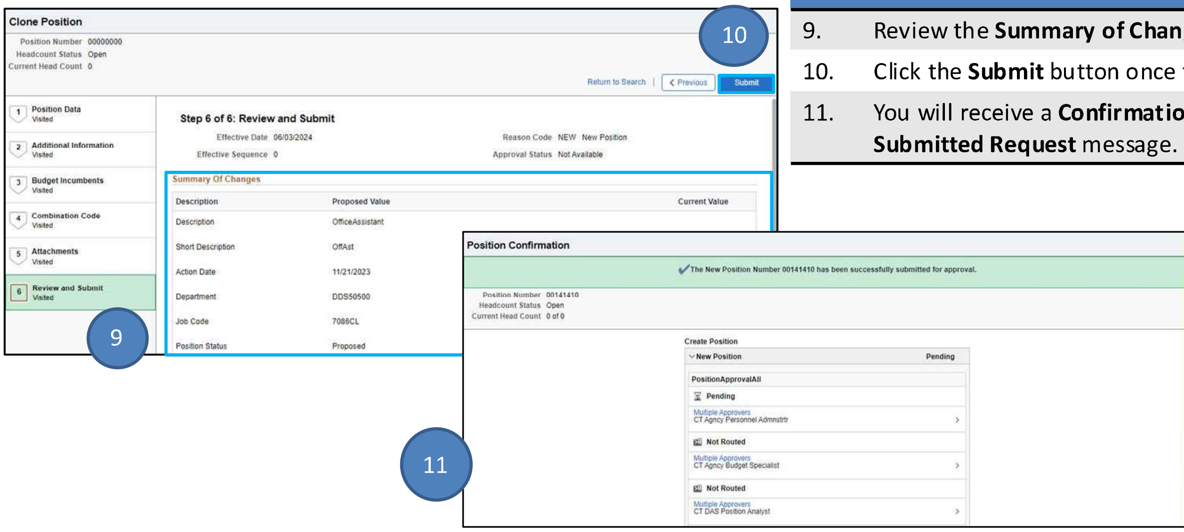
 29

You will need to select a Combination Code when cloning a position, as it will not populate from the existing position. So on this tab, you'll follow the same steps as when creating a new position like we saw in the prior unit.

5. You can either: click the Magnifying Glass to lookup a combination code by chartfield, or paste a complete combination code in the field if you have it available.

Review and Submit

Review the summary of changes and submit the request

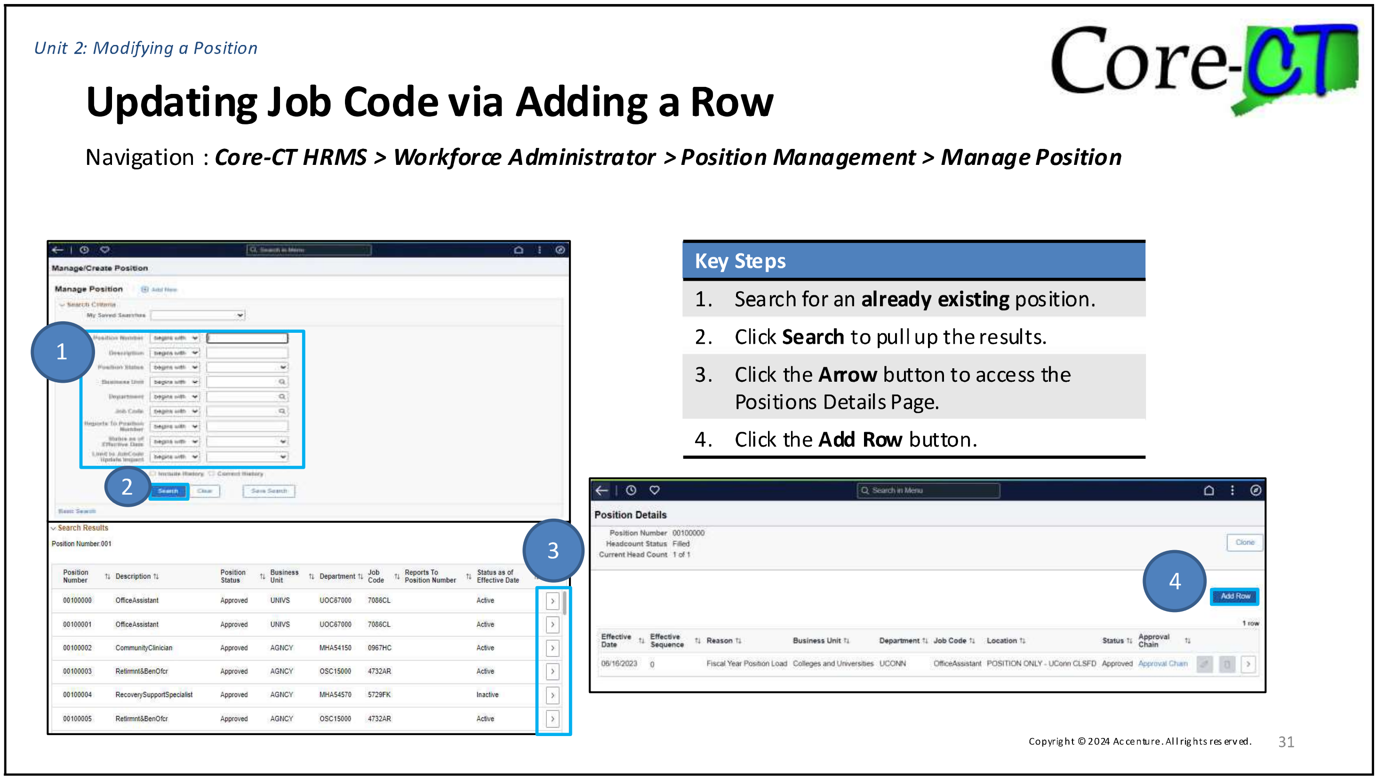


Key Steps	
9.	Review the **Summary of Changes**
10.	Click the **Submit** button once finished.
11.	You will receive a **Confirmation of Submitted Request** message.

 30

Once you've completed all the steps in cloning a position, you will review and submit the request.

After clicking Submit, you'll see that a Position Number has been generated, and you will receive a confirmation message stating that your request has been submitted for approval. The Approval chain listing all of the required approvers, if applicable, will appear on this confirmation screen.



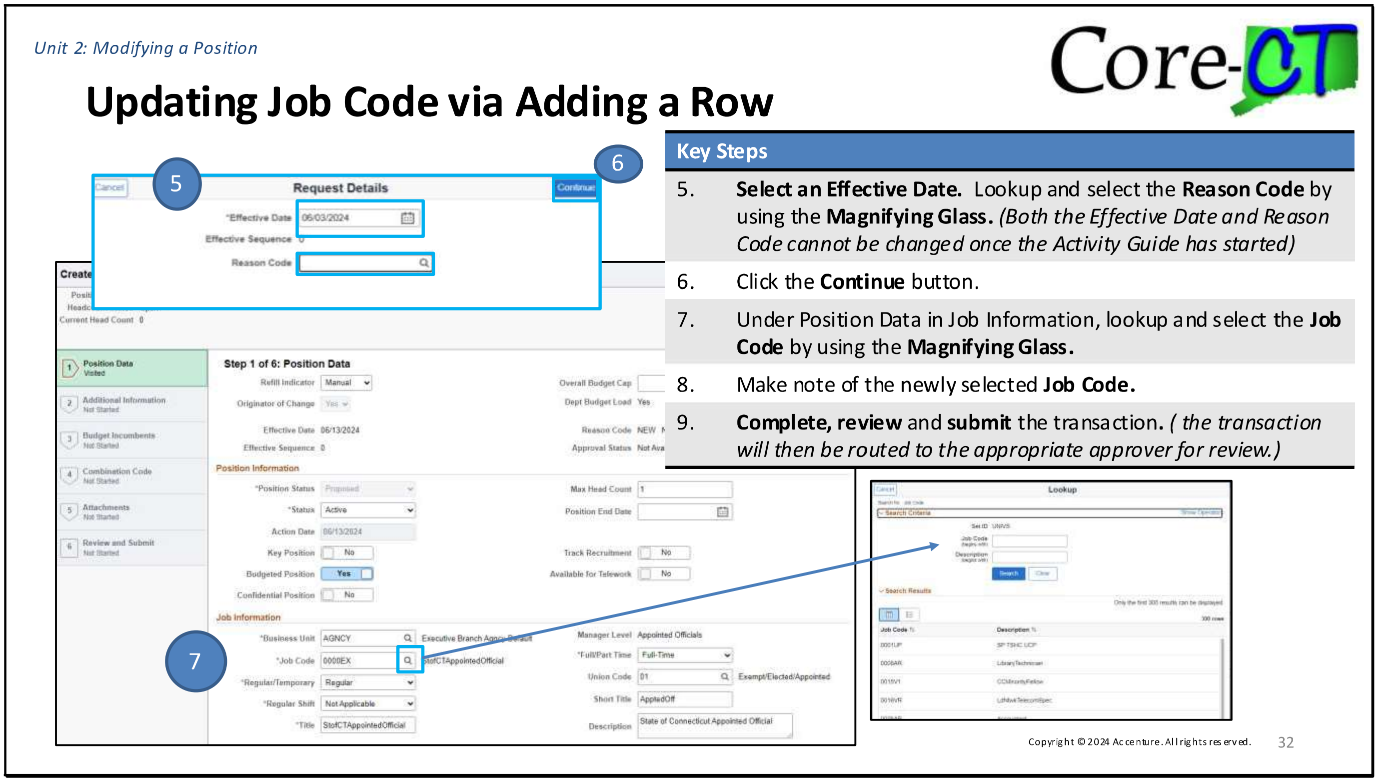
Next, we'll look at an example of modifying an existing position by changing the job code on a new row.

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

You will need to

Enter your search criteria or position number, if know.

2. Click **Search** to pull up the results.
3. Click the **Arrow** button to access the Positions Details Page.
4. Click the **Add Row** button on the right of the page, highlighted as #4 in the screenshot.



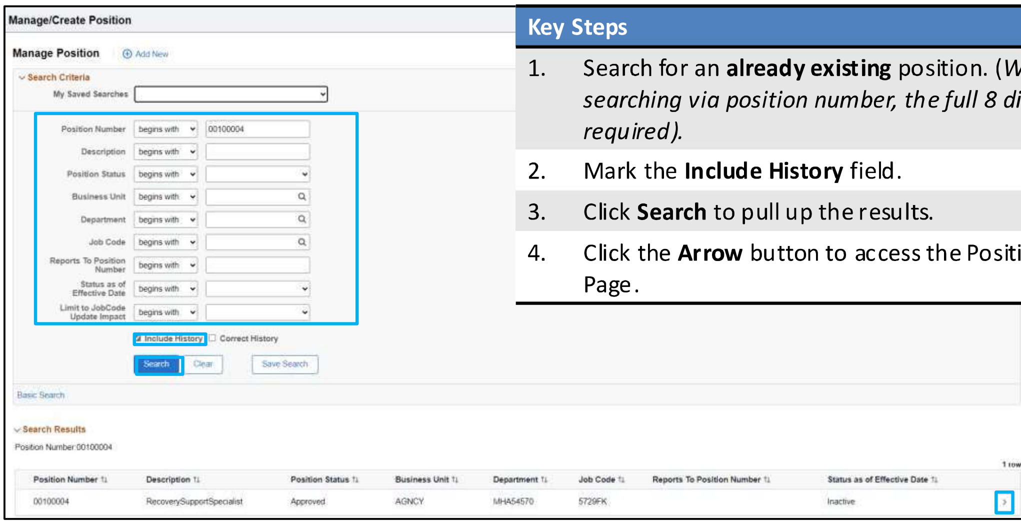
You will then need to :

1. **Select an Effective Date.** Lookup and select the **Reason Code** by using the **Magnifying Glass or entering the code manually.** *(Both the Effective Date and Reason Code cannot be changed once the Activity Guide has started)*
2. Click the **Continue** button.
3. In the Job Information section of the Position Data tab, lookup and select the **Job Code** by using the **Magnifying Glass or by entering it manually.**
4. If required for your agency, enter a justification for the reclassification into the Description box.
5. **Complete, review** and **submit** the transaction**.** *(the transaction will then be routed to the appropriate*

approver for review.)

Searching for Position Transactions

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



Key Steps	
1.	Search for an **already existing** position. (*When searching via position number, the full 8 digits are required).*
2.	Mark the **Include History** field.
3.	Click **Search** to pull up the results.
4.	Click the **Arrow** button to access the Positions Details Page.

 33

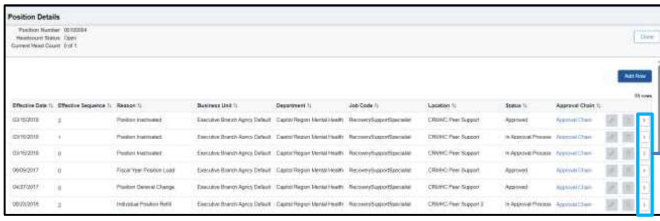
You can also search for existing position transactions and see all of the historical transactions on a given position. To do so, navigate to ***Core-CT HRMS > Workforce Administrator > Position Management > Manage Position***

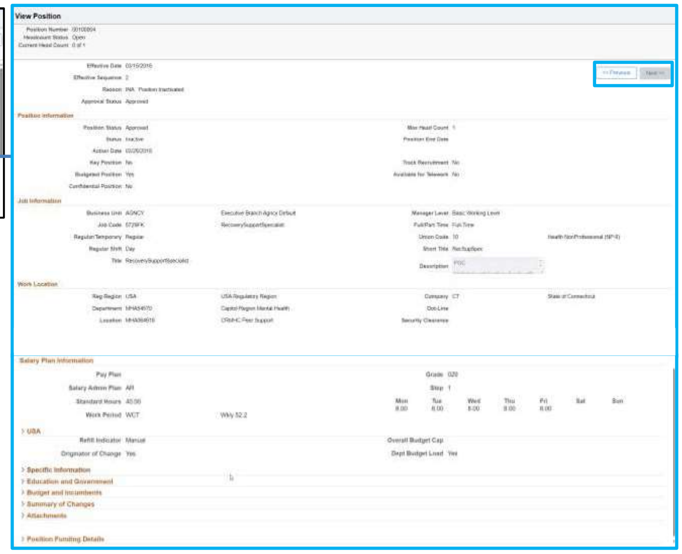
Enter the existing position number by entering in all eight digits, including leading zeros.

2. Mark the **Include History** check box.
3. Click **Search** to pull up the results.
4. Click the **Arrow** button to access the Positions Details Page.

Searching for Position Transactions

Here you can view all the transaction history for that selected position.





Key Steps

5. Click the **arrow** button to view more details about that position transaction.
6. Review the information of that transaction.
   (*Scroll down to the bottom of the page to view more sections like Specific Information, Education and Government, and more.)*
7. Click the **Previous** or **Next** button to navigate between all the transactions of that position.

Note that the Activity Guide we've discussed in earlier units does not apply when you are reviewing an existing transaction. Instead, all of the position information appears on a single page, with options to expand or collapse each header.

1. Review the information of that transaction.
   (*Scroll down to the bottom of the page to view more sections like Specific Information, Education and Government, and more. Note that funding details are at the very bottom of the page when viewing an existing row)*
2. Click the **Previous** or **Next** button to navigate between all the transactions of that position.

Let's review our Learning Objectives:

You should now be able to:

- Access Position Management Fluid pages and dashboards
- Manage positions for both new and existing positions
- Clone positions
- Review transaction status

35

That completes our review of the Position Management changes.

Now you should be able to :

- Access Position Management Fluid pages and dashboards
- Manage positions for both new and existing positions
- Clone positions
- Review transaction status

Summary Review

Questions

- Post questions within the chat

Do you have any questions?

Congratulations on completing the Position Management Course!

- Complete the Training Evaluation.
  Position Management Course Survey
- Review the course material after Training completion.
  Training Material Location
- Reference the Core-CT Modernization site for more information:
  Core-CTModernizationProject(state.ct.us)

 37

Congratulations!

That completes the Position Management Course!

Please take a moment to complete the training evaluation which will be linked in the chat.

The course material will be posted in the chat, as well as on a new training page currently in development with other job aids.

Finally, to access more information about the upgrade overall, please visit the **Core-CT Modernization** site. Thank you for your participation!