Transcript

October 9, 2024, 1:04PM

CC **Catania, Cheryl** 0:04

And today we'll be going over managed job.
In this course, we'll be covering the enhancements to PeopleSoft and how they affect managed job.
We'll referring to this class. You will refer to this class as you all have the HR specialist role.
This means that you have the ability to create employees, add jobs as well as edit personal data.
And we asked during this course that you ask questions and remain engaged while I provide an overview of the system.
This webinar features a bit functions a bit differently than the teams meetings that you may be used to, so I'm briefly going to review the roles for today's training as the trainer, I'll be covering the course content, including discussing the new functionality, and I'll also be answering quest.
And maintaining a parking lot for follow up if needed.
We also have a facilitator in this meeting. They will be sharing the presentation and managing the time. They will also direct questions from participants at the end of the section and when the class is completed, we'll be sharing a survey that you all can click on and comple.
For us.
As the participant, please ask questions in the chat and we have noticed in previous trainings that there are some agencies that aren't able to use the chat feature in the meeting.
We believe it's due to some type of security or something of that nature. So try and chat within the meeting and if you're not able to do that, you can send a chat through teams directly to Rose Jensen.
She'll put her name inside the chat bar here.
That way everybody has it, so you can direct your questions directly to her.
And she'll then put them over into the chat.
Be aware that your microphone and cameras have been turned off, so you won't have the ability to turn them on.

The end of this course you'll be able to use the new fluid tiles for job as well as maintain emloyee job information and create new training.
I'm sorry and create new transactions.
The overview and objectives for today's training is to get you familiar with the changes that will impact managing job data.
Some of the changes that are due to the upgrade consist of a new user interface, new navigation for managing job, new fluid tiles and pages.
HR processes to maintain employee jobs and managing job activity guides.
There's a glimse at the schedule for today's training.
It should take us about an hour, depending on the number of questions we'll be covering new navigation, how to make updates to employee information, including a walk through of changing an employee status and placing an employee on leave.
And as I mentioned earlier, we will also include time.
For questions.
Here's a list of terms that you may not be familiar with, but you may hear throughout the duration of the trainings for the upgrade.
Fluid user interface.
This is a new interface that adapts to different types of devices in addition to laptops.
It will now be more mobile friendly.
These are a collection of tiles that users can Click to access transactions. They serve as a personalized entry point for different types of tasks and activities.
Rocess this is a series of actions or steps that users complete within a specific process.
Essentially, an activity guide helps to streamline tasks by breaking them down into manageable steps.
And lastly, tiles. It's a shortcut button that helps you quickly get to important tasks or information without having to search through menu bars.
In this first in this first section, we're gonna explore the process of viewing and maintaining employee information.
It's important to mention that the business process has not changed, but the navigation has been updated.
We'll review the new fluid tiles that have been used to maintain employee data, and we're also going to review the new functionality of activity guides.
There is a screenshot of the new navigation for managed job.
Hopefully you've already taken the navigation overview training, so this looks slightly

familiar to you. When logging in, you'll most likely will default into the employee self-service home page.
From there you'll click the drop down arrow and select the core C TH RMS.
Once on the core C TH RMS homepage, you'll select the tiles for workforce administrator.
Manage human resources.
And then finally managed job.
Uon selecting the manage job tile, you'll be brought to the employees search page.
The search page contains the same fields that you have today, with a few additional ones added.
You can now include location, department, job code and HR status as part of your search criteria.
The additional fields can be really helpful in narrowing your search results, such as you can select return only active employees and not have inactive employees appear on your results.
The results will appear at the bottom of the page listing all the employees who meet the criteria. If there are multiple results, there will be a scroll bar on the right to review the entire list if needed.
It's important to click on the include history button prior to selecting the employee. If you determine the history is needed after selecting the employee, you'll need to return to this page to check that box.
That is something that is probably the biggest thing to get used to, so I would suggest.
Always having to include history selected when doing your searches.
Once you have completed your search, your click on the arrow to the right of the employee that you're searching for and that will bring you to the job action Summary page.
Once you have selected the employee, the job Action Summary page will appear.
This page gives you a quick snapshot of the employees job information. From this screen you can quickly view information for each job role, such as the action reasons, position numbers, salary plan, et cetera.
If you click the include history button on the previous page, you're also going to see all of the historical rows for this employee as well.
This is a great new feature.
And is extremely helpful.

It allows a quick review of the employees record without having to scroll between the multiple rows.
Job Action summary page.
Is the page that is probably going to be used the most, and many actions can be taken directly from this page.
This screenshot reflects the new way to view an employee record. Once you've determined the row of employee data that you want to review, click the arrow on the right of the page.
This will open the job details page for that specific row while reviewing the record you will have the ability to move between the existing rows using the previous and next arrows.
Uch as you do today.
An example of how job data looks today.
And when we talk about it, we talk about it and refer we say that if this is the classic view of job data, so that's what you have today. As you notice, there are separate tabs that go across the top of the page and there's also some link.
That open additional pages like the benefit page and the time report or data. With the upgrade, the same pages are there, but they are all presented differently.
So once you've selected the job from the search page, this is the new job details page. As I mentioned, you still have the same fields that are available today, but the information is now located on one page separated by headers. You have the option to alter your view.
By selecting or by selecting expand all or by clicking the drop down arrow next to each header.
Going back to the summary page just above, the search results is a sort icon. When you click this icon, you can see the criteria that can be used to sort the employees job row. All the fields located on the sort menu are visible on the summary page.
As you can see from the number of fields, in many cases the details displayed on this page may give you the information you need without having to open the record and navigate through multiple rows to capture the history.
As an example, if you want to determine the date that an employee was promoted, you get that information by scanning rows right from the summary page.
Also on a summary page is the notepad.
It's no longer located in the job detail pages.
The notes are available in two separate areas now.

One is on the right hand side of the page.
For each individual entry, it's located under the actions drop down icon.
Highlighted in blue that is going to work similar to what we do today when we add a row and we click on Notepad to enter the information for that specific row.
That will be the notes section on the right hand side.
On the left of the screen there was a notepad icon on top of the search results.
You'll notice there is a green circle with a number six in it.
This reflects the number of notes that have been entered for the entire job record.
You can click on this icon and you will see all the notes entered for this employee displayed in one list.
Another feature of the job Action Summary page.
This is where you would start a new transaction to add a new row into job data, you will need to click on the blue create job action button on the top right of the screen.
Don't you click the create job action button? A window will pop up for you to enter the effective date and the action reason. The effective date will default to the appropriate new sequence number. If there's an existing row for that same effective date.
One big change is that once you enter the information on this pop up window and click continue, you will no longer be able to change the effective date or the action reason values entered onto on this page.
When clicking continue, you're gonna be brought to the manage job activity guide, which is only available when entering a new transaction.
Notice that the action reason is at the top of the page and both this and the effective date are view only. The steps on the left side mimic the tabs that are currently across the top in job data.
In the screenshot provided, you may see steps for sections you currently don't have access to in core. These steps are based on your individual security and you will still only see the section that you see today.
With the addition of a few that we will discuss in upcoming slides.
The guide is meant to ensure all steps have been completed when making updates.
There will be an indicator on each step that displays whether it has been visited, not started or completed.
Before I go on to the next slide, I just want you to notice that on the right side of the screen there is a box called related information.
We'll be reviewing that on a future slide, but I wanted to point out the placement on

the page because that's where you're going to find your time reported data.
Using the activity guide, one of the new steps is called additional job info. This tab includes fields that were not delivered but were created specifically for core CT.
These fields include permanent job code and permanent PCN, which are used when completing a temporary service in a higher class transaction.
Also, the Ste. rank and certification list number fields have also been moved to this page.
As I mentioned a few slides ago, the related information box is located on the right hand side of the page. Time reporter data is no longer a link on the employment data page and it's going to be located in this section here.
There is also a link to view job details. Both of these pages, when you click on the link will open up in a new separate window.
Here's an example of how the page looks when you click on view job details.
The job details page is displayed and it's the same page we reviewed earlier. Since the page opens in a separate window, it allows you to review existing information while you're still in the process of creating a new transaction. If you have include history checked, you'll be able to.
Go between all of the existing rows in the job details pages.
Ability to add attachments is another new feature, and it's a very intuitive way of adding an attachment to an employee's job record from the attachment step on the activity guide, you will click on the add attachment button.
Click on my device.
From there you will search for the necessary file.
Click the upload button and finally the blue done button.
Once the file has been uploaded, you have the option to add a description. In addition, if you have uploaded a file in error, there is a delete button to remove it.
But as I stated earlier, this is a new feature and there will be more guidance that will.
Be coming out regarding adding attachments to job.
But there are any questions on covering maintaining, you know, job information and how the new job data will look. Please post them in the chat and we can review them now.

RM **Reutter, Shanon M** 16:18
I have nothing.

Jensen, Rosemarie 16:26

Thing so far Cheryl.

Catania, Cheryl 16:33

I will move on, but if any questions come to mind while we're going forward, feel free to put the questions either in the chat or send them to rose at any time.
OK, now that we've completed reviewing the new functionality, I'll be showing you how to show you a quick walk through on how to update the employees data.
Going to be going over creating a job action, utilizing the activity guide and getting more familiar with the new fluid functionality.
Start the transaction, you're going to navigate to the core C TH RMS homepage.
Select the workforce administrator tile, then the manage human resources tile and then the manage job tile.
Again, this is an example of the search page.
If you know the employee ID, you can enter it here or use the different search fields.
Once you click on the appropriate employee, it'll bring you to the job action Summary page.
From the job Action Summary page, we're going to click on the create job action button, which is indicated by the number 8 on the left hand slide.
The effective date will default into the current date, so you need to pay careful attention to your effective date.
This is the point of time where you have to update it to reflect the appropriate date.
If you know the action reason, you can enter it or you can use the magnifying glass for assistance.
There is an action reason job aid on the core CT website and the job aid lists all of the action reasons, and it also list their corresponding 3 letter acronyms if that's helpful.
In this scenario, we're going to be selecting data, data change, general data change as we'll be updating The Reg temp indicator in the employee class.
Click the continue button marked by #10 to start the transaction.
Activity Guide will open and since we will not be making any updates to the information on the work location page, we can go straight to the job information page by clicking that step in the activity guide.
For this scenario, the regtemp indicator has been changed to temporary and the

employee class has been changed to temporary six months or less.
Another new tab with the Activity Guide is the validate tab. Once all of the information has been updated, navigate to the validate tab and click the validate button which is marked with the number 11.
The validation process will run and display any errors or warning messages.
These are the same messages that you received today. When you save a transaction.
In this example, there is a warning that a temporary employee is linked to a regular position.
Morning's a pair for your review and update if necessary.
They will not stop the transaction from being saved if the information is correct.
If you receive an error, the system will not allow you to save the transaction and the record will need to be corrected.
In this example we receive the error message that the appointment end date is required for the employee class selected.
Using the activity guide you can go directly to the to the page that you know needs to be updated by clicking on the appropriate tab on the side.
Here we clicked on employee data tab and inserted the appointment end date in order to resolve the error.
After correcting the error to the employee class, go back to the validate tab and click the validate button again.
You will see that the error message no longer appears. The warning messages will still appear, but they can be bypassed if the information is correct.
Highlighted in blue, you will see a validation successful message that will appear once there are no more errors and strictly just warnings left.
Once you confirm the warnings have been reviewed and are correct, you can click the submit button as indicated by #13.
A green banner will appear to confirm that the transaction saved.
There are two links at the bottom of the confirmation page, allowing you to either return to search or go back to the job action Summary page.
I'm gonna go through one more scenario.
So in this last scenario, I will be walking through placing an employee on a leave of absence.
Again same navigation path.
Corsi Thrms homepage, workforce administrator, manage human resources and manage job.

Search for the existing employee and select the appropriate one.
Again, make sure you include history as checked if you need it.
Click the create job action which opens the pop up window.
Make sure you update the effective date to the correct date and use the appropriate action reasons. Once you select the action, only the corresponding reasons will appear in the search results.
In this scenario, we selected paid leave of absence.
With the reason of maternity and we're going to be placing the employee as we're going to be placing the employee on a paid leave, click the continue button to start the transaction.
And the activity guide opens.
You will notice that the payroll status has been updated to leave with pay and the expected job end date is now visible on the page.
As in today's system, when an employee is out on a leave, you will need to enter the expected return date.
This is the only field meeting entry. You can click directly on the tab to validate and then save.
One thing I did want to point out is that the employee name, employee ID and title will all appear just below the action reason, but it's been removed for training purposes as with the action reason and effective date this will appear on each page as you move through.
The activity guide.
If you need to update the time reporter data, click on the Blue Time reporter data link in the related information box. This box is always visible so you can update this at any point in the transaction.
Upon clicking on the time REORTER data link, we are taken to the TIMEREPORTER data page.
On this page we can view and edit time reporter data for the employee that the job action is being created for.
Once all information and changes have been updated, click the submit button.
Again, upon clicking submit you will receive a confirmation page that the transaction has saved.
In conclusion of the course, users should now be able to navigate and access the fluid pages, access notes, actions, and searching for an employee and understand

how to maintain employee job information.
Are there any questions on the presentation?

Reutter, Shanon M 25:14
We do have a few. The first one, what documents, if any, are being recommended to add like service ratings, FMLA, HR2C.

Catania, Cheryl 25:15
OK.
If you're referring to the attachments button that is now available that has not been. Fully talked about yet as to what should and should not be uploaded into the document, so there will be further guidance that will be coming out that will discuss what should and should not be uploaded into job.

Reutter, Shanon M 25:47
One, I notice that there are.
Excuse me, I notice that there are employee class abbreviations.
Is this? Is there a list of for these?

Catania, Cheryl 26:00
There is a job aid on the core CT website that lists all of the employee classes, if that's what you're referring to.

Reutter, Shanon M 26:09
And then one more when completing a job data wreck transaction, where do you enter the notes?

Catania, Cheryl 26:18
There was a slide that went over the notes.
There's two different section where you can enter the notes from the job Action Summary page on the left hand side is where you would view the notes if you wanted to see them all together, but to add a note you would click on the action button on the.
Right hand side of the employee and there will be notes that appears in the drop

down action. You would click on the notes button there and it will open the same as it does in Notepad today.

RM **Reutter, Shanon M** 26:50
That looks like that's it for questions.

JR **Jensen, Rosemarie** 26:56
Haven't gotten any additional.

CC **Catania, Cheryl** 27:08
Are there any other questions?

RM **Reutter, Shanon M** 27:11
Just hang on one second, Cheryl.
Something popped up and I can't see where it went.

CC **Catania, Cheryl** 27:28
I see one in here that says will job aids be updated with new screenshots.
Yes, we will be updating our existing job aids to reflect the new navigation pass and screenshots as as needed.
So yes, they will be updated.

RM **Reutter, Shanon M** 27:43
OK.
I have one more. What happens if you enter the wrong date on the record action?
Since you cannot change it.
Do we have to do a ticket?

CC **Catania, Cheryl** 27:53
If you save the transaction, yes, you will need to do a ticket for correct history, same as you do today. If you notice that it is the wrong date and you haven't saved it yet, then you can click return to search, correct your effective date and then contin.
On with your transaction.
And Rose added in a comment into the section.
You will only be able to delete your own attachments in core, correct?

Oh, that was 2 rows.
We were looking into this yesterday and we have to do a little bit more testing on the attachments, so that's also another reason why there still guidance that will be forthcoming on the attachments.
We're not 100% sure if it's only you that can delete your own, but that's what we're thinking.
But we need to do a little bit more more testing on the attachment feature.

RM **Reutter, Shanon M** 28:57
OK, looks like there's nothing else coming in.
I will move to the last slide.

CC **Catania, Cheryl** 29:07
The managing job data course.
Shannon will put a link into the chat where you will be able to complete an evaluation form for the course.
If you're not able to chat during this meeting, you are still able to click on the link within the chat, so it it should still be OK and then training material.
There's a link there for where the training material will be located and also a link to the course CT modernization site. This is where there will be information regarding the change agent meetings.
Different training courses and the registration pages for training the modernization page will be updated as new information comes forward.

JR **Jensen, Rosemarie** 29:51
Cheryl, we did just get a couple more questions.

CC **Catania, Cheryl** 29:54
OK.

JR **Jensen, Rosemarie** 29:54
I put them in the chat.

CC **Catania, Cheryl** 30:00
Entering a note is this only done outside the transaction or is there a way to get

notes in the actual transaction?
Unfortunately, you have to leave the transaction and enter it from a job action summary page.
There's no longer a note icon while you're actually in the job details pages, so yes, you do have to get out of the transaction to enter the note.
Are the notes the same from the left and right buttons?
Not sure who entered that, but is there a little bit more information?
As to what?
What you're asking if you're asking if the notes on the right side of the screen are the same as the notes on the left side of the screen, then yes, it's just two different ways of accessing them.
The note that is located under the job action icon. If you click on the notes there, that is the note related to that specific row. If you click on the notes on the left hand side that has the cumulative number in it.
That will give you a listing of all the notes that are on that employee's record.
Pick which one you want to view, so hopefully that was answering your question.
Since time reported now opens in a new tab, will it now be possible to review a different employees time report or data while entering a job transaction for comparison?
Believe you can.
It does open in a new window and it will remain open until you close it.
So if you leave that window open, you can then move on to another employee and it will still be there as an open tab for you.
Anything else?
All right, it looks like that is going to wrap up the session.
Just know if once the upgrade goes live, if you have any questions whether it's navigation, how to perform a process or you need help with something, feel free to log a footprints ticket at any time and someone from the staff will get back to you and help you.
Through it. Have a great day, everybody.

◉ **Reutter, Shanon M** stopped transcription