L200MJ002 - Managing Job-20241007_134738-Meeting Recording

October 7, 2024, 1:07PM

40m 2s

Braga, Donna 0:10

Morning, everybody.

We will start the meeting in a couple of minutes.

We were just waiting for.

We had a little bit more of the attendance.

So it looks like we're getting close.

All right guys, it looks like it probably could get started whenever you'd like.

CC **Catania, Cheryl** 1:13

Good morning, everyone.

My name is Cheryl Catania and I am the manager for the human resource and time and labor modules within core CT.

And today, we're going to be going over some quick overviews of how job is changing with the upgrade.

In this course, we'll be covering the enhancements to PeopleSoft introduced by the upgrade.

We ask that during this course you please put your cell phones on vibrate and ask questions and remain engaged throughout the presentation.

This webinar functions a bit differently than the teams meetings. You may be used to, so I'll briefly review the roles for today's meeting.

As a trainer, I'll be covering the course content, including discussing new functionality as well as answering questions.

We will have a parking lot for any questions that we need to follow up on.

We also have a separate facilitator who is sharing the presentation and managing time. The facilitator will also direct questions from participants at the end of the section and at the end of the course will share a survey.

As the participants, please ask questions in the chat throughout the training.

Please note that you're not able to turn on your cameras and your microphones will remain muted throughout the entire training.

At the end of this course, you'll be able to use new fluid tiles for job, as well as

maintain employee information and create new job data transactions.
Overview and objectives for today's training is to help you get familiar with the changes that will impact managing employee data.
Some of the changes due to the upgrade consist of a new user interface, new navigation for managing job, new Fluid Pages, HR processes to maintain employee jobs, and managing job activity guides.
There's a glimpse of the schedule for today's training.
It should take about an hour depending upon the number of questions we will 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 again, we will also have time for questions.
There is a list of some of the terms that you may not be familiar with, but you may hear throughout the duration of this training.
Fluid user interface.
The new interface that adapts to different types of devices, such as smartphones, tablets, desktops, home pages.
These are the collection of tiles that users can Click to access transactions.
These serve as a personalized entry point for different types of tasks and activities.
Process a series of actions or steps that users complete within a specific process.
Essentially, an activity guide helps to streamline complex tasks by breaking them down into manageable steps.
And lastly tiles.
These are a shortcut button that will help you quickly get to important tasks or informations without searching through menus.
Maintain employee job.
So here we will explore the process of viewing and maintaining employee information. It's important to mention that the business process has not changed, but the navigation has been updated.
We'll review the new fluid tiles that will be used to maintain data and we will also review the new functionality of activity guides.
And logging in you most likely will default to the employee self-service homepage.
From there you'll click the drop down arrow and select the core C T H RMS homepage.
When that home page appears, you'll see tiles on the left hand side.
And you will first select the tile for workforce administrator which will then bring you

to the manage human resource tile and finally the manage job tile.
There is an L100 navigation course that hopefully will also help you with navigation if you ever need to review that.
On selecting the managed job, tile will be brought to the employees search page.
The search page contains the same fields that you have today with a few additional ones. You can now include location, department, job code and HR status as part of your search criteria these additional field.
Can be helpful in narrowing your search results, such as returning only active employees.
The search results will appear at the bottom of the page listing all employees who meet the criteria. If there are multiple results, there is a scroll bar on the right to review the entire list.
If needed, it's important to verify that the include history button is checked prior to selecting the employee. If you determine history is needed after selecting employee, you will need to return to this page to check the box.
Click on the arrow to the right of the employee you are searching for, which will bring you to the job actions Summary page.
Once you have selected the employee, the job Action Summary page will appear.
This page will give you a quick snapshot of the employees job information and from here you can quickly view information for each job role, such as the action Raisin position, number, salary plan, etcetera. If you click the include history button on the previous page, you will also see.
The historical rows as well.
This is a new feature.
And it's extremely helpful.
It allows for a quick review of the employees record without having to scroll between each of the rows in job data.
There are multiple actions that can be taken on this summary page.
This screenshot reflects the new way to view an employee record. Once you have determined the row of employee data that you would like to review, click the arrow on the right of the page.
This will open the job details page for that specific row while reviewing the record you will have the ability to move between existing rows using the previous and next arrows as you do today.
Here is an example of how job data looks today.

This is what we refer to when we talk about the classic view.
There are separate tabs that go across the top of the page and there is also some links that open additional pages.
With the upgrade, these same pages are still there, but they're presented differently.
When you select job from the search, you open to the job details page.
This is the new version of job data. As I mentioned, you still have the same fields that are available today, but the information is now located in one page separated by headers.
You have the option to alter your view by selecting expand all or by clicking the drop down arrow next to each individual 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 rows.
All of 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 multip.
Rows to capture the history.
Example, If you want to determine the date that an employee was promoted, you could get that information by scanning the Rose right from the summary page.
Also on the summary page are notes.
They are no longer located in the job data pages.
They are available in two separate areas now on the right side of the page. For each individual entry, the notepad is located under the actions drop down Icon highlighted in blue in the screenshot.
On the left of the screen there is a notepad icon on the top of the search results you will notice there's a green circle with a number six in it.
This reflects the number of notes that have been entered for the entire.
Job record. You can click on this icon and you will see all notes entered for this employee record in one area.
Job Action Summary Page is also where you would start a new transaction to add a new transaction you will click on the blue create job action button on the top right of the screen.
Once you click the create job action button, A window will pop up for you to enter the effective date and action reason.

The effective sequence will default to the appropriate new sequence number if there is an existing row for that same effective date.
One big change is that once the information is entered on this page and you click continue, you will no longer be able to change the effective date or action reason from the values entered on this page.
Upon clicking continue, you will be brought to the managing job activity guide, which is only available when entering a new transaction.
Notice the action.
Reason is at the top of the page and both this and the effective date are view only.
The steps on the left side mimic the tabs that are currently across the top and job.
In the screenshot provided, you may see steps for sections that you currently don't have access to in core.
These steps are based on security and you will still only see sections.
That you see today with the addition of a few additional ones that we will discuss in upcoming slides.
Guide is meant to ensure all steps have been completed.
Completed when making your updates.
There'll be an indicator on each step that displays whether the top has been, whether the step has been visited, not started or completed.
Before I go on to the next slide, if you can just take note of the related information section on the right of the page, we will be reviewing that in the future, but I wanted to point it out so that you could see where the placement was of.
It on the page before we move forward.
One of the new steps is the tab called additional job info.
This page includes fields that were not delivered and were created unique to corsett.
These fields include permanent job code and permanent PCN, which are used during temporary service in a higher class and also the SDE rank and certification list.
Number fields are also moved this to the ADD.
Job info tab.
I mentioned a few slides earlier. The related information box is located on the right hand side of the page.
Time reporter data is no longer on the employment data link and will be located in this section.
There is also a link to view job details.
Both of these pages will open in a new separate window.

Here is an example of how the page looks when you view when you view the link through job data. The view job details the view job details page is displayed and it's the same page we reviewed earlier. Since the page opens in a separate window, it allows you.
To review existing information while you are still in the process of creating the new transaction, if you have include history checked, you will also be able to go between all of the existing rows.
Using the arrows.
Ability to add attachments is a brand new feature and it's a very intuitive way to add an attachment to an employee record.
From the attachment step on the Activity guide, check the add attachment button.
Then you're going to click on the my device and from there you will select the necessary file, click the upload button and then finally the blue done button.
Once the file has been uploaded, you will have the option to add a description.
In addition, if you have uploaded a file in error, there is a delete button to remove the file as I stated earlier, this is a new feature and it will be more guidance coming regarding adding attachments to job.
Going to pass for a Mona if there are any questions on what I have covered regarding reviewing employee data, please post them in the chat.

KD **Klaben, Dianna** 15:21
Are no questions so far, but we can wait a few moments to see if any populate.

CC **Catania, Cheryl** 15:44
Jackie, I saw your hand up.
I'm not sure if you had a question if you did, can you put it in the chat?
OK, I will move on.
We'll have questions at the end as well, if any come up while we're going through the rest of the presentation.
Now that we completed reviewing the new functionality.
I will be showing a walk through on how to update employee data.
We'll be going over creating a job action utilizing the activity guide and getting more familiar with the new fluid functionality.
Start the transaction.
We'll navigate to the core C T H RMS homepage.

Select the workforce administrator tile, manage human resources, and then the manage job tiles.
Will bring us back to the search page and if you know the employee ID you can enter it here or use the different search criterias and then click on the appropriate employee which will bring you to the job action Summary page.
The Activity guide will open and since we will not be making any updates to the information on the work location page, you can go straight to the job information page by clicking that step in the activity guide.
This scenario, the rake temp indicator has been changed to temporary and the employee class has been changed to temporary six months or less.
Another new tab in 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 error or warning messages.
These are the same messages that you receive when you save a transaction today.
In this example, there is a warning that a temporary employee is linked to a regular position.
Warnings appear when your review and update when your review and update is necessary.
We 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 field you need to update by clicking on the appropriate tab.
Here we clicked unemployment 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 still appear, but can be bypassed if the information is correct.
In the middle of the page under messages you will see that the validation was successful.
Once you confirm the warnings have been reviewed and are correct, you can click on

the summary button that is indicated by #13.
The Green banner will appear to confirm that the transaction's 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.
The second scenario I'll be walking through placing an employee on a leave of absence.
Navigation will be the same as we've gone over in the previous slides.
Core C T H RMS dot homepage, workforce administrator, manage human resources and then the managed job tile.
Page will appear to search for your employee.
Another nice feature that I didn't mention earlier is that when you get to this page, the search results will contain the information from the previous five employees that you searched for. If you recently searched for this specific employee, they'll appear in the search results when the page op.
Pick the create job action which opens a pop up window.
Make sure you update the effective date and the correct to the correct date as it will default to today's date and use the appropriate action reason codes. Once you select the action, only the corresponding reasons will appear in the recent search. In this scenario we are selecting the.
Paid leave for maternity as we are going to be placing the employee on a paid leave.
Click on the continue button to start the transactions.
And the activity guide opens.
You will notice that the payroll status has updated to leave with pay and the expected job end date is now visible as in the system today when an employee is out on a leave, you'll need to enter the expected return date.
Since this is the only field needing entry, you can click directly on the tab to validate and then save.
One thing that I want to point out, 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 report or data page, click on the blue timereport or data link in the related information box.
This box is always visible, so you can update this at any point while you are working

on the transaction.
Clicking on the time report or data link you're taken to the time report or data page.
On this page, we can view and edit time reported data for the employee that the job action is being created for.
It is the same time reported out of page that is used today in job data and this page will open in a separate window.
Please click on the final tab of the Activity Guide as referenced with #15.
I'm clicking submit.
You'll receive a confirmation page. The transaction has saved and again you will have the links at the bottom to either return to the job action summary or to go back to the search page.
In conclusion of this course, users will now be able to navigate and access fluid pages, access notes, actions, and searching for an employee. Understanding how to maintain employee job data.
Are there any questions on the presentation?
It went quicker than I expected.
I expected more questions in the middle, so does anybody have any questions?

KD **Klaben, Dianna** 24:12
There was one question and it it says well, this presentation presentation be available to print.
And it was answered yes. The slide deck will be posted on the core CT website and you would be able to print it from there.
Another question.
Is just realize this training is being managers. Is that right?

CC **Catania, Cheryl** 24:36
This training is for anybody who works in job data and completes transactions in job data, meaning adds rows and updates employee data.
I'm sorry. There was also another answer in there from from Rosemarie.
So yes, it is for anybody who's updating employee records.
I do see some hands up.
I'm not sure if they're not able to chat.

KD **Klaben, Dianna** 25:26

You can.
Can you please post your questions in the chat and we can answer them for you.

CC **Catania, Cheryl** 25:31
It seems some people aren't able to post into the chat.

KD **Klaben, Dianna** 25:35
OK.

CC **Catania, Cheryl** 25:56
The next question without hearing it.
So that's great.
Is there anything you can do on that end for the chats or should I have them put it, send them directly to me? I wouldn't want to hear a list.

KD **Klaben, Dianna** 26:12
Yes, that would be great. If they can send it directly to you and then I'll update.
An excel sheet or something and we can post them.

CC **Catania, Cheryl** 26:22
OK.
So somebody has a question that is not able to chat. You can chat me directly right in teams and I'll read the questions out.

JR **Jensen, Rosemarie** 26:34
Cheryl, I have been getting a couple questions directly from participants who aren't able to chat. Jamie Williams asked.

CC **Catania, Cheryl** 26:40
OK.

JR **Jensen, Rosemarie** 26:43
If you do realize that you made a mistake on the action reason.
Would you need to close out and start over?
The answer is yes, which is why we're emphasizing that change. Once you hit once

you've entered your action, reason and your effective date and you hit continue and you start the activity guide. If you do realize you've made an error there.
You would have to click exit and restart.

Catania, Cheryl 27:18
OK.
I received one from.
Nye, they are coming in now.
What is the SDE rank on job data page that's been moved to the additional information tab that actually is a field that was created when core went live and it was to help track seniority for the State Department of Education.
So that's a field that is currently in job.

Klaben, Dianna 27:40
We have a couple of questions in the chat.
The first one is are you creating AQ and A to go along with the deck?

Braga, Donna 27:55
Yes.

Catania, Cheryl 27:56
Sorry, sorry. I was trying to read and think at the same time.
Yes, we will be creating AQ and a that will go along with this.

Klaben, Dianna 28:04
Another question is where do you put the notes in this?

Catania, Cheryl 28:12
Where do you put the notes? There was a slide that showed the notes.
See what the slide number was here.
If you're referring to the notepad.
This is going to get a little confusing on the questions here so.
Were you able to find the slide for notes Diana while they look at some of these other questions?

Klaben, Dianna 28:45

Yes, I will post the training material location.

I'll ping that in the chat as well as we will have a managing job data survey for the end so that everyone could take I I will ping those in the chat as well and the core CT modernization project where they can go.

So I'll I'll bring those 3 into the chat.

Catania, Cheryl 29:06

OK.

Thank you.

Klaben, Dianna 29:08

Welcome, Welcome, welcome.

Braga, Donna 29:09

I'm just going to throw in there as well. A lot of people keep and this is Donna Braga. Sorry, a lot of people keep asking about, you know, where this stuff is going to be posted.

There is going to be a new training page that we are.

It's in construction right now for all the L1 hundreds. You can get the ones you need that are prerecs right today that you took before you came here.

There's going to be a new training page with the L100.

It's in construction. It's coming.

These recordings for now I will post them on the registration page, but ultimately everything will be on the new training page that's in construction.

And it is coming. Thank you.

Klaben, Dianna 29:55

Another question we have in the chat is on the search page.

Can you save your search criteria?

Catania, Cheryl 30:01

Yes you can.

That will function the same way that it does today.

So you can save your search criteria.
I have a question from Hillary.
Is anyone able to delete attachments after they are posted in job data?
Hillary, to be honest with you, I'm going to have to double check on that.
I believe anyone that would have the HR specialist role would be able to remove the attachment, but we'll have to put that on the parking lot and follow up on that one.
I know.
Can you provide an example of what we would upload in core as an attachment that is still being worked on as I had mentioned in the presentation, there will be guidance that will be created that will go out that will discuss attachments on job data. So that will.
Be more information on that will be forthcoming.
Natalie, my question is in regards to the attachment feature. If you upload an attachment, is the attachment viewable by anyone who accesses the transaction or just the person who uploaded the attachment?
The attachment will be attached to the employee's job data record.
So again, HR specialists will be able to open the attachment and view it.

KD **Klaben, Dianna** 31:22
In the chat, is there going to be sandbox for us to be able to do some test entries so that we can become comfortable with the new look and feel?

CC **Catania, Cheryl** 31:32
Must be the one I just clicked on.
I also have that question in my chat and no, there will not be a sandbox, so hopefully the training materials that are out on the modernization page will give you a comfort level on where you need to go to get your job done.
Most of this is navigation.
The look, the feel, are a little different.
The business processes have not changed, so there will not be a sandbox. And of course if you have questions on completing any of your transactions.
Navigation anything like that. You can always submit a footprints ticket and someone from the team will get back to you.
I've got the same one from.
Rose.

Jackie.
I realized the effective date is wrong after starting a job data transaction.
What do I do? Just close without saving and start over?
Unfortunately, yes, that is probably going to be one of the more difficult things to get used to when the create a job box pops up.
You do put in the effective date action reason and once you continue into the record, you don't have the ability to change that.
So you do need to leave the record without saving it and put in the correct effective date.
And action recent code.
And another thing that I'm not sure that I mentioned, but on the core CT website, there is the action action, reason, job aid and if you pull up that job aid, not only will it give you the actions and the reasons that that you know you can use.
Together, it will also give you that three letter acronym that you saw on the page.
So if you look at the action of data change right next to the word data change, it will have DTA.
So if you want to use shortcuts and use a three letter acronyms, you can get all of those right off of the action job a.
Now I see one coming up.
Nope, think that's good. Are there any other questions that I missed?

Braga, Donna 33:59
Cheryl, this is Don again.
I I see two hands up, but I just wanted to point something out because again, I've had a couple people reach out to me directly because and and I apologize, I stepped away.
They they're not able to post in the chat.
That could be their agency.

Catania, Cheryl 34:16
Mm hmm.

Braga, Donna 34:19
Blocking them, right, because this is open to the outside.
So anybody should be able to register and anybody should be able to post in the

chat, but it could again, it could be your agency's settings.
So if that's the case, I'll have you send a question, send your question from and reference the specific training to thereadiness.gov.
I'm sorry readiness@ct.gov e-mail box and we can add it to the FA QS.

Catania, Cheryl 34:49
Addition, Donna, I have been having them send directly to to me personally in the teams chat and some have also sent some to Rose.

Braga, Donna 34:53
OK.

Catania, Cheryl 34:56
So for those of you that have your hands up, if you have that access to send your questions directly to myself or team or rose through teams, please go ahead and do that.

Braga, Donna 34:57
OK.

Catania, Cheryl 35:08
I think I'm caught up on the ones that I have in my chat right now.
I don't see any more that have come up.

Braga, Donna 35:16
I see one hand is still up, but I don't know if her question was answered.

Catania, Cheryl 35:23
Celestian, are you able to use the teams chat to put your question in there directly to me?

Braga, Donna 35:30
See Melissa Berski's hand is up.
I don't know if her question was answered. Yep.

Catania, Cheryl 35:33

Sing with Melissa.

Braga, Donna 35:38

If you're not able to put in the chat, you can again send the message and then you can bring your hand down.

We'll know that you have been answered.

Catania, Cheryl 36:01

It happened coming through one moment.

Maybe not.

Last call for questions.

Anybody else have a question?

I did not see your chat, Melissa, but it appears that you can send it right through the meeting chat 'cause I saw that.

You put your question right in the meeting chat.

Braga, Donna 36:47

So I think I see it, Cheryl.

Sorry Diana, you might see it too.

Catania, Cheryl 36:50

No.

Braga, Donna 36:51

I see Melissa's my desktop computer screen says congratulations. You completed the 200, so it won't let me use the chat.

It said the training was ended.

So not sure why it said the training was ended.

But there again there is going to be AQ and a deck and the the recording and the transcript are going to be posted.

You got to go through the modernization web page.

Go to the registration page if you want to see it now. Again, there's going to be a new training page that will have everything.

Catania, Cheryl 37:33

And as Donna is referring to, since I don't see any more questions, this is the links that she was referring to.
There will be a survey that will be posted into the chat.
That hopefully everybody can get to. And so if you could please take the time and fill out the survey, that would be much appreciated.
The second link will bring you to job aids that can be used for additional resources and then finally the third link goes to the modernization page, which is where we will have the items like change agent, meeting recordings as well as links to some of our registration items.
So if there's other classes that you need to sign up and register for, you can get them through the modernization page and it will also have links to the prerequisites.

Klaben, Dianna 38:27

The Managing survey right now in the chat.

Braga, Donna 38:32

I'm gonna share a tip and trick that Melissa used.
Kudos to you.
She her agency was blocking the chat.
She joined via her phone and was able to post in the chat.
Sneaky little tip and trick.

Catania, Cheryl 38:50

To know going forward.
For just a minute 'cause. I'm not sure if someone is typing a question here.
I think not, since it hasn't come through yet.
So again, if there are any more questions when we do go live with the upgrade, if you have any trouble navigating, if you have trouble creating your transactions, log a footprints ticket and once you log that footprints ticket, someone from the team will get back to you and.
Be able to help you out or point you in the direction of where you can find additional resources.

That completes the training and I hope everybody learned something today and will enjoy the new features that become available with the upgrade. Thank you.

Braga, Donna 39:51
Thank you, Cheryl.

Braga, Donna stopped transcription