L200MJ003 - Managing Job-20241106_182931-Meeting Recording

November 6, 2024, 6:01PM

28m 8s

Reutter, Shanon M started transcription

CC **Catania, Cheryl** 0:12

In this course, we're going to be covering the enhancements to PeopleSoft and how they affect managing job, and you've been referred to this class since you have the HR specialist role. This means that you have the ability to create employees, add jobs as well as edit personal data.

During this course, we ask that you ask we during this course, please ask questions and remain engaged while I provide an overview of the changes to the system.

Some useful information accessibility is now available on the webinar.

It must be turned on by users individually and also the core CT training page is now available and updated at the end of this course. We will put a link in the presentation so that you're able to access that page.

This webinar functions a little bit differently than the teams meetings. You may be used to, so I'll briefly 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 questions, questions that may come up.

We also have a facilitator that will be sharing the presentation and managing time.

The facilitator will direct questions from participants at the end of each section.

And will also share a survey when the course is completed.

As the participants, please ask questions in the chat throughout the training and we have noticed through some of our trainings that there are some agencies that aren't able to access the chat to ask questions. If that's the case with you and you're not able to use the chat.

Please send them directly to Rose Jensen through teams and she will pop them over into the chat of the meeting so that we can review the questions. She's gonna put her name in.

The chat now so that you have it available to you.

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

At the end of this course, you'll be able to use the new fluid tiles for job, and you'll be able to maintain employee job information as well as create new transactions.
The overview and objective for today's training is to help get you familiar with the changes that'll 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 and tiles HR processes to maintain employee jobs, and a new managing job activity guide.
Here's just a high level glimpse of the schedule for today's training.
We'll be covering the new navigation. How to make updates to employee information, including a walkthrough of changing an employee status and placing an employee on leave. And as I mentioned earlier, we're also going to include time for questions.
There are some terms that you may not be familiar with, but you may hear throughout the trainings for the upgrade.
Fluid user interface.
This is the new interface that adapts to different types of devices in addition to laptop laptops.
It'll now be more mobile friendly.
Home pages. 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. This is a series of actions or steps that users complete within a specific business process.
Essentially, an activity guide helps to streamline tasks by breaking them down into manageable steps.
And tiles. These are shortcut buttons that help you quickly get to important tasks or information without searching through menus.
In this next section, we'll explore the process of viewing and maintaining employee information.
It's important to mention that the business process has not changed.
It's the navigation that has been updated.
We'll review the new fluid tiles used to maintain employee data, updating an employee's information and the new process for selecting action reasons. When adding a new transaction and reviewing the new functionality of the activity guides.
This 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.
Most likely you'll default to the employee's self-service homepage.
From there, you'll click on the drop down arrow and select the core C T H RMS homepage.
When the core C Thrms homepage opens up, you'll select the tile for workforce administrator and then manage human resources, and then finally the manage job tile.
And the managed job tile opens. You'll be brought to the 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, as shown indicated by the number one.
These additional fields can be helpful in narrowing your search results, such as returning only active employees.
They include history. Button is still located on the search page as indicated by the number 2.
The search page will appear at the bottom listing all employees who meet the criteria. If there are multiple results, there's a scroll bar on the right to review the entire list.
If needed, it's important to click the include history button prior to selecting the employee. If you determine the history is needed after selecting the employee, you will need to return to this page to check the box. I would suggest always having the include history selected when doing search.
Click on the arrow to the right of the employee you are searching for.
Which will bring you to the job action Summary page.
But 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. From here you can quickly view information for each job role, such as the action, reason, position number, salary plan, etcetera. If you've clicked the include history button on the previous page, you will see the histor.
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 talk.
Clean rows.
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've

determined the role 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 existing rows using the previous and next arrows, the same as you do today.

There's an example of how job data looks today.

This is what we refer to as the classic view. There are separate tabs that grow that go across the top of the page, and there's also some links that open additional pages with the upgrade. These same pages are still there, but they are presented differently.

You select a job from the search page you open to job details. As I mentioned, you still have the same fields that are available today, but the information is now located on one page and it's 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 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, so as you can see from the number of fields, in many cases the details displayed on this page.

May be enough to give you the information that you need without having to open the record and navigate through multiple rows to capture the history.

For example, if you want to determine the date an employee was promoted, you can get that information by scanning rows right from the summary page.

Also on the summary page are notes they're no longer located in the job detail page.

They're available in two separate areas on the right side of the page for each individual entry.

The notepad is located under the actions drop down icon highlighted in blue on the left side of the screen there is a notepad icon on the top of the search results.

You'll 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'll see all the notes that have been entered for this employees record in one area.

Job Action Summary Page is also where you would start a new transaction to add a new row and job. Click on the blue create job actions 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 the action reason. The effective sequence 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 and click continue, you will no longer be able to change the effective date or action reason from the values that are entered on this page.
Pound 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 displayed at the top of the page 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 security.
Still only see the sections that you see today with the addition of a few, which we will discuss in upcoming slides. The guide is meant to ensure all steps have been completed when making updates and there is an indicator on each step that displays weather, weather that step.
Has been visited, not started or completed.
Before I go on to the next slide, take note of the related information section on the right of the page, we will be reviewing that in a future slide, but I wanted to point out the placement on the page before we moved forward.
One of the new steps is called additional job information.
This page includes fields that were not delivered and were created unique to core CT.
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 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 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'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 are still in the process of creating a new transaction. If you have include history text checked, you'll be.
Able to review all the rows in the record by using the arrow buttons.
The ability to add attachments is a brand new feature and it's a very intuitive way to add an attachment to a job record from the attachment step of the Activity Guide, click on the ADD attachments button, and then click on my device.
From there you should be able to select 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've uploaded a file in error, there is a delete button to remove it before saving. As I stated earlier, this is a new feature and there will be more guidance coming regard.
Adding attachments to job.
OK.
I'm gonna pause for a moment and see. Have there been any questions that have come in?

Reutter, Shanon M 14:55
We do have one, it says.
Can you include history and include history be defaulted in our settings?

Catania, Cheryl 15:06
There's no personalization as far as the buttons for include history, so you do need to select it.
I think in production if you have it selected, it remains selected until you go to a different page.
But I'll be honest, I'm not sure on the new system if that's the case.
So you do have to always look at it and make sure that it is selected before you move on.

Reutter, Shanon M 15:34
OK.
There's another one.
Does that change to job data or any change affect our favorites?

Catania, Cheryl 15:43

Do you mean saving favorites?

If you're referring to saving favorites.

Reutter, Shanon M 15:53

We currently have saved.

Catania, Cheryl 15:55

OK. When the upgrade happens.

Your favourites, unfortunately, are not coming over, so you do need to go through and mark down everything that you have right now in your favourites. I know.

I know so that is one of the big drawbacks. The favourites will not be coming over, so make sure you mark them all down.

Write your menu paths and pretty much the fluid pages are personal data.

Position data, job data. Those are the ones that are going to be tiles. The other pages will still be through the same type of a menu bar, so you'll just need to go in and select them all and re add them to your favorites.

Reutter, Shanon M 16:39

OK.

That's all we have for questions.

Catania, Cheryl 16:41

OK.

OK, now that we've we're done reviewing the new functionality, I'll be showing a walk through on how to update employee data, what we're gonna be going over is creating a new job action, utilizing the activity guide and getting more familiar with the new fluid functionality.

Again, the navigation will be starting on the employee self-service going to the core C TH RMS homepage and from there we're going to go to workforce administrator.

Manage human resources and then manage job.

Will bring us to the search page and if you know the employee ID you can enter it here or use the different search criterias and then you will click on the appropriate employee which will bring you back to the job action Summary page.

Once a the job action Summary page, we're gonna click on the create job actions as indicated with the number 8, the effective date will default into the current date, so pay careful attention to update this to the appropriate effective date of the transaction. If you know the action.

Reason you can enter it or use the magnifying glass for assistance. There is an action recent job aid on the core CT website and it lists all the action reasons and their corresponding 3 letter acronyms. If that would be helpful.

In this scenario, we're just gonna be using a data change, general data change, and we'll be updating the regtemp indicator and the employee class.

Click the continue button 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.

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 the information has been updated, you'll navigate to the validate tab and click the validate button which is marked with the number 11.

The validation process will run and it'll display any errors or warning messages.

These are the same messages that you receive when you save a transaction today.

In this example, there's a warning that the temporary employee is linked to a regular position warning appear 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 field you need to update by clicking on the appropriate tab.

Here we clicked on employment data tab and inserted the appointment end date in order to resolve the error.

After correcting the error on 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 message will appear, but can be bypassed if the information is correct.

Under messages, you'll see a note that says that the validation was successful.
Once you confirm the warnings have been reviewed and are correct, you can click the submit button as indicated by #13.
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.
And then in this last scenario, I'll be walking through placing an employee on a paid leave of absence.
Again, it is the same navigation following from the core Cthrms home page through to the manage job tile.
Page will appear to search for your employee and another nice feature that I didn't mention earlier is that when you get to this page, the search results will contain information for the previous five employees that you searched for.
So if you recently searched for this employee filipare in the search results at the bottom of the page when this opens up.
The create job action which opens a pop up window.
Make sure you update the effective date to the correct 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 a page leave.
With maternal bonding, and we're going to be placing them on a paid leave.
Click the continue button to start the transaction.
When the activity guide opens, you will notice that the payroll status has been updated to leave with pay and the expected return 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.
Since 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 appear just above the action reason, but it's been removed for training purposes.
And then as with the action reason and effective date, this will appear on each page as you move throughout the activity guide.
If you need to update the time reporter page, click on the Blue Time reporter data link in the related information box. This box is always visible so you can update the this at anytime during the transaction.

And clicking on the time reporter data link, you're taken to the managed time reporter data page. On this page, you can view and edit time reporter data for the employee that the job action is being created for.
It's the same time.
Reporter data page that is used today in job data.
This page does open in a separate window as well.
Click submit on the final tab of the Activity Guide as referenced with the number 15.
And again you will receive a confirmation page that your transaction has saved.
So in conclusion of this 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.
And we'll open it up again to questions.

Reutter, Shanon M 25:01
OK, we have a few here or two here.
Will we be able to delete attachments after saving or will that require a ticket?

Catania, Cheryl 25:11
We are looking into that and that's part of the reason why we're also saying that at the moment there will be additional guidance coming out regarding attachments to job. So until that guidance comes out, attachments shouldn't be uploaded to job. We are logging a ticket with a techn.
Team to verify who can delete attachments once saved and when they can be deleted.
So we'll have to get back to you on that.

Reutter, Shanon M 25:39
OK, will existing custom reports and queries that pull information from job data need to be recreated?
Do the tables change?

Catania, Cheryl 25:49
No, there's no table names that have changed, so it should have no impact on custom reports that you've created.

Reutter, Shanon M 25:59
And the last one so far is, will there be a guide provided for quick reference after the training?

Catania, Cheryl 26:09
Umm.
I'm not sure exactly what type of guide that you're looking for.
Last slide of this presentation does have a couple links that might be helpful to you and it links to the course CT website where we are putting updated job aids.
They're called L100 trainings that have different topics such as navigation or things of that nature.
So hopefully what you're looking for will be there as well. As this presentation will be posted online.

Reutter, Shanon M 26:52
Hey, that's all I have for now.

Jensen, Rosemarie 26:55
I don't anything either.

Catania, Cheryl 27:00
OK. If there is no more questions.
Following this training, if you do come up with a question, you can log a footprints ticket.
The URL is right on this screenshot here and that will get routed to the team that needs to address it. And if you don't have access to footprints, you can always send it to the readiness at ct.gov e-mail.
And that is the completion of the managing job data course and there will be a link to an evaluation that will be put into the chat.
So if you could take a few minutes and fill that out, and then the course material will be located where the the link is for number 2 and then #3 will send you to the modernization site which is being updated continuously with new information as it becomes.
Available.

No new questions.
I think that's going to conclude the presentation.
I hope you all have a great day.

◉ **Reutter, Shanon M** stopped transcription