L200PA001 - Position Approval-20241022_172837-Meeting Recording

October 22, 2024, 5:04PM

24m 5s

JR **Jensen, Rosemarie** 0:03

Welcome to the position approval L200 course.

started transcription

JR **Jensen, Rosemarie** 0:06

My name is Rose Jensen.

I'm the principal HR specialist with the core HR team.

Today we'll be building on the topics reviewed in the position management course to delve into the changes to the position approval process that are coming with the upgrade.

As in all of our trainings, we do encourage you to ask questions to seek clarification or raise any points we may not have addressed.

I will be pausing several times throughout to respond to questions.

So here's a brief review of the roles for today's training.

As your trainer, I will be covering the course content, including discussing new functionality.

I will also be answering the questions at the end of each session. We have a separate facilitator who is sharing the presentation and they will also be directing questions from participants to me at the end of each section and as the participants, please do ask questions in the.

Chat throughout the training as you won't be able to turn on your microphone.

We are aware that some users cannot use the meeting chat. If that applies to you, you can send a direct teams chat to Cheryl Catania, who will put her name into the meeting, and then you can also send an e-mail to readiness@ct.gov as we.

Be assembling AQ and a that'll be posted online after the class.

This is a glimpse at the schedule for today's training. We expect the presentation to be under an hour, but we've allotted extra time for questions.

So from a high level perspective, some of the changes that can be expected from the upgrade include the following introduction of the fluid dashboard, which is the new

user interface.
This consists of updated updated navigations pages and tiles to access pages in PeopleSoft. Although functionalities will remain similar.
The look and feel and ways to access will change position data and the accompanying approval process have changed significantly in the following ways, which we're going to discuss.
In detail today.
First, the position approval tab is now only available to view historical approval data.
In other words, approvals entered in the current system with the fluid upgrade, the position approval tab is replaced by the approval chain, which shows the approval roles and names timestamps for each approval and fun.
As a place for Approvers to add their comments, there is also now a summary page which compares the proposed changes to the current position values.
Adding rows is no longer a part of the approval process.
Instead, each position transaction is a single row, no matter how many approvals are received. As a result, approvers no longer need to enter an effective date or reason code.
And finally, the Notification Center will now be the place for necessary alerts and action items.
There will no longer be a work list to access your positions.
At the completion of this course, users should be able to access the position approval, fluid tiles, manage and view pending approvals, understand position approval processing and navigation, understand walk through demonstrations that cover the topics of approving or denying positions, as well as pushing back transactions due to Inc.
Complete or incorrect information. An item to note here is at the recycle action is being replaced by the push back action.
The purpose remains the same.
This is really just a name change.
So here's a refresher. Are some of the terms we'll be using throughout the L200 courses.
The Fluid user interface is a new interface that adapts more readily to different types of devices, including smart phones and tablets. Home pages, which we also call dashboards, are a collection of tiles that users can Click to access transactions.
These serve as a personalized entry point for different types of tasks and activities.

The guided process or activity guide.
A series of actions or steps that a user can complete for a specific business process. Essentially, an activity guide helps to streamline complex tasks by breaking them down into more manageable steps.
And finally, tiles are a shortcut button that'll help you quickly get to important pages in the system without searching through menus like you do today.
So as I mentioned before, position management and the position approval process have experienced significant changes.
However, it's important to note that while the how of position management and approval is changing the underlying business practices and processes have not changed. Transactions that require approval in the current system will require the same approvals in the upgraded system.
And as in the current system position approvers will have the ability to approve, push back or deny position transactions.
However, instead of accessing pending positions from their work list, positions will be accessed through the approvals tile. This tile can be found on both the workforce administrator and manager self-service dashboards.
The purposes of this class we will be accessing that approval tile through the workforce administrator dashboard as shown here.
The full navigation path is core C, T H RMS, workforce administrator and approvals.
The approvals tile will reflect the total number of approvals pending for that user with a total in the lower right hand corner of the tile. In this image, there are three total approvals pending.
Users will click the approvals tile to be brought to a listing.
Of all transactions requiring their approval.
Once you click on the approvals tile, you'll be brought to the pending approvals page shown here where all submissions pending your approval will display.
You'll notice that new positions and updates to existing positions are listed separately in the left hand panel. So in this screenshot there are four new positions under create position and three existing positions to be approved under manage position.
Users can then select the right arrow on each item to view further details.
And enable the desired action. Positions can also be filtered on this page by the requester, the date routed or from which means the most recent approver.
Once you've selected a position to review, you'll be brought to the manage position

page that's displayed here.
Note that this is different than the managed position tile from which position transactions are initiated, and here you'll see a summary under proposed changes that list the fields that have been updated on the pending row as compared to the most recent row. In this example, the position has.
Been submitted for refill approval.
So the reason code refill indicator and position status are.
Reflected as proposed changes. This is also where you will take action on the position using the approved, deny or push back button shown in the upper right hand corner.
We'll see each of these actions at work later in the course, and finally, this page also has several helpful links that we will take a close look at right now.
The first of these links is view position details that's bracketed in blue in the screenshot.
Clicking this link will open the pending position transaction in a separate window so that the approver can review all of the fields on the position row that's being considered for approval, not just those that have changed.
The approver also has the option of clicking the edit details link from the manage position page. If you click edit details.
Note that you will need to proceed through the activity guide just as you would to initiate a new position transaction in order to make your change.
You would then be prompted to return to the approval page to approve the position you have just edited.
Please note Approvers will not be able to modify the effective date or reason code.
If those values are incorrect, the transaction would need to be pushed back.
Next, you may remember the new feature we discussed in the position management course, which allows the originator to add attachments either as a document upload or as a note. If the originator has added either to the transaction, the managed position page will include attachment details that's highlighted as.
Number one here.
So the approver can Click to open and view the note text.
Or open the uploaded attachment.
The managed position page also houses the approval chain.
The approver can select the approval chain right arrow to view a list of the approvers that are required for this transaction listed in order of routing.

Note, if there's only one user with that role on the approval chain, their name will be shown directly on the approval chain. If there are multiple users with that role for your agency, you'll see multiple approvers.
As shown in the screenshot and you can click multiple approvers to view the specific names and titles.
Of the approvers for that action.
The last field to mention on this page is the approver comments box. Since the position approval tab is no longer used in the updated system, this is where APPROVERS will enter their comments when approving, denying or pushing back a position. These comments will be added to the APPRO.
Chain. We'll take a closer look at adding comments later in the course when we review examples of taking actions on positions.
And an alternate way to access pending position approvals is through the notification Bell icon.
So if a new pending transaction is submitted that requires your approval right on your homepage, you'll notice a green dot will appear just beside the Bell icon.
You can click that icon and a list of items that are pending. Your approval will appear.
You can click on the link to be brought directly to the approval page for that position.
Once you do the approval page will appear and function.
Just as it does when accessed through the approvals tile.
So to summarize, these approval changes access to approve, deny or push back positions is now through the approval stile or the Notification Bell icon. The view position details link on the approval page allows you to view further details about the position while the edit details link allows the.
Approver to update fields on the pending transaction if necessary.
And the approval chain can be viewed by selecting the right arrow highlighted as #4 in the screen.
Before we get to some examples of taking these actions, we'll pause for questions.
So please go ahead and post your questions in the chat.

Reutter, Shanon M 11:32
I have nothing so far.

Jensen, Rosemarie 11:33
OK.

Catania, Cheryl 11:39
I have nothing.

Jensen, Rosemarie 11:42
OK.
Alright, we will move on.
We'll take a look at approving a pending position transaction now.
So from the core C, T H RMS dashboard, you'll select the workforce administrator tile and then select the approvals tile. And as I mentioned earlier, you'll notice that the tile shows the total number of approvals that are pending. Your review in the lower right hand corner.
Clicking the approval tile brings you to your pending approvals page and from here select which position transaction you'd like to open by selecting the right arrow.
Once a position is selected, the manage position page will open for further details.
So as we discussed, this page indicates the specific fields that were changed on the pending transaction to make the review more straightforward and streamlined. In this example, the department and location code have been changed.
We have highlighted the approver comments box with #5 in this screenshot. So this is where the approver enters any comments they wish before taking action on the position.
These comments will then.
Here on the approval chain, along with a timestamp of when the approval was made.
And as a reminder, there's no longer a position approval tab, so the approval chain replaces that tab in the new system, meaning there's not another place for the approver to add a comment.
To view the approval chain for this position, click on the right arrow, highlighted as #6. On this screen shot as an approver, you can quickly see who has already approved this transaction along with their comments. So in this example, the agency personnel administrator has approved the trans.
And it's now pending with the agency budget specialist.
And you can see the comment written by the agency personnel administrator at the

bottom of the approval chain, along with a timestamp.
Once all information is reviewed, select the approve button and note that you are not adding a new row as you approve the position. As a result, there is no need to enter an effective date or reason code. Instead the entire position transaction will be a single row, no.
Matter how many approvals are required. This also means that all newly established positions will retain the action reason of new throughout the entire approval process.
After clicking approve the approver comments box seen earlier from the manage position page will pop up again.
So that serves 2 purposes.
One it kind of gives you a chance to make sure that you clicked the right button because here you Click to prove and it says approve in the heading above the comments and it also gives you another opportunity to either add your comments or to edit what you.
Wrote.
Before clicking on to the next approver.
Once the position is approved by all required parties, the originator will receive an alert on their home page, indicated by a green bell next to the bell.
Excuse me? A green dot next to the Bell icon.
The originator can navigate via the managed position tile to view the approved action, and you'll notice that there is a link to the approval chain. From this view of the position as well.
OK, we'll take another brief pause for questions.

Reutter, Shanon M 15:17
Currently, there's nothing in the chat.

JR **Jensen, Rosemarie** 15:19
OK.
Thanks Shannon.

CC **Catania, Cheryl** 15:24
I don't have anything for mine either.

JR **Jensen, Rosemarie** 15:26

OK.
Alright, thank you.
Now we'll take a look at pushing back a pending position transaction.
The navigation and most steps are exactly the same as approving a position.
You'll select the position you need to take action on from the pending approvals page as accessed through the approvals tile.
If you find the position requires additional information or revision before it can be approved, you'll select the push back button. You can add comments from this screen in the approver comments box.
Or, as we saw, you'll be prompted again after clicking the action button. In this case, push back to give you another chance to write your comments.
So this is the pop up for comments that appears after selecting push back. You can see that push back is the title of the comment box.
You'll want to be sure to add comments in the approver comments box to let the originator know what revisions are needed before they resubmit the position for approval.
And of note, since Approvers can no longer modify the effective date or reason code while approving, if either of these fields need to be changed, that would be a cause for a push back once your comments are finalized, select submit, and then as a reminder pushing a POS.
Excuse me.
Pushing back a position returns a transaction to the originator, who will then need to review, update if necessary, and resubmit.
Once the position is pushed back, the originator will receive an alert on their home page, just like they do for an approval. They can navigate to the managed position tile to view the position, which will show an approval status of rework to resubmit a position after it's been.
Pushed back, the originator will need to add a new row with any necessary changes.
And this is our final example to show how to deny position request.
The navigation is the same.
Navigate to the pending approvals page through the approvals tile and select the position you want to take action on.
This time you'll select deny which is the middle button.
And once deny is selected, the pop up window will display. You have another opportunity to include comments on why the position is being denied and any

comments you entered while on the managed position screen will appear here so that you can review them if necessary. And once those com.
Are added select submit.
Once the position is denied, the originator receives an alert on their home page.
They can then navigate through the position management dashboard to view the denied transaction and note that the approval status will show as denied and the position status will show as rejected.
At anytime during the approval process or after receiving an alert that the position has been approved, pushed back or denied, users can check the status by navigating to the manage position tile.
That's the same tile from which you initiate a transaction and the navigation path is core C, T, H RMS, workforce, administrator, position management, manage position.
Once landing on the manage create positions page.
You would search for a position by entering in all 8 digits of the position number, including leading zeros.
Click the arrows on the right of the screen to open the position details.
From the position details page, you would click the approval chain link on the appropriate row.
The approval chain will open in a pop up showing who has already approved their comments, as well as the roles that still need to approve the position.
So the approver that's listed as pending in this screen shot currently has a position awaiting their approval. The Approvers listed as not routed will receive the position for approval after that pending approval completes their piece.
So as we've reviewed the approval process in the upgraded system does not require approvers to add new rows.
However, position transactions that were approved in the system currently in use will still show multiple rows, so the position shown here has a pending reclassification transaction effective 10/4/2024 submitted through the new approval process, the top row will remain.
Proposed until it is fully approved.
At which point the approval status will change from inapproval process to approved and the approval chain link will remain available to anyone reviewing the position to see who approved and when, as well as their comments.
No new rows will be added throughout.
By contrast, the establishment of this position, which was entered in July 2023, is still

comprised of multiple rows.
In this case, the establishment was initiated effective 7/28/23 sequence 0.
Sequences one through three were added by the Approvers.
All of those rows will still be available for review in the upgraded system, even though the new process does not add rose.
So we've also discussed that the position approval tab has been replaced by the approval chain for transactions approved in our current system. The position approval tab will still exist in the upgraded core, but as of you only feature. So this is in order to maintain the position appro.
History. So you would click the approval chain link on a historical row to open the position approval tab in a new window for review and you'll see the same information you see now in.
The system.
So we've reached the end of our course.
In conclusion, users should now be able to do the following. Access the approval tile and position approval, fluid pages, manage and view pending approvals.
Push back a position if more information or revision is required. Approve or deny a pending transaction and view and understand the approval chain.
All right.
And again, we'll open the floor to questions.

Reutter, Shanon M 22:06
Give nothing.

JR **Jensen, Rosemarie** 22:07
OK.
Thank you, Shannon.
We can give another moment.
K.
Alright.
If you do have a question that you think of after, please do submit a footprints ticket and we would be happy to respond.
You would do that however you normally submit a footprints ticket, either directly in footprints or if you don't have access you can send an e-mail with your question to readiness@ct.gov.

Great. Thank you so much everyone for participating today.
Please take a moment to complete the training evaluation.
Which Shannon will link in the chat and the course material will also be posted in the chat as well as on the course CT Modernization homepage, where you'll also find links to the L100 courses, infographics and other helpful material.
Thanks again for joining us today.

Reutter, Shanon M stopped transcription