L200PA002 - Position Approval-20241023_133030-Meeting Recording

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JR **Jensen, Rosemarie** 0:03

Thank you for joining us.

Welcome to the position approval L200 course.

My name is Rose Jensen.

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

Today we'll be building on the topics we 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 points. We may not have addressed.

I will be pausing several times throughout the presentation to take those questions.

This is a brief review of the roles for today's training.

As your trainer, I'll be covering the course content as well as answering questions at the end of each section.

We have a separate facilitator who is sharing the presentation.

She will also be directing questions from participants to me at the end of each section.

And as the participants, we ask that you ask your questions via chat as you won't be able to turn on your microphone.

We are aware that some users aren't able to use the meeting chat itself. If that's the case for you, you can direct your question directly via teams to Cheryl Catania, who will be putting her name in the chat here, and then she can share your question with every.

And alternatively, you can e-mail readiness@ct.gov who will be preparing AQ, and a that'll be posted online.

After the class.

This is a glimpse at the schedule for today's training. The presentation itself will be under an hour, but we've built in some extra time for questions.

So from a high level perspective, some of the changes that can be expected from the upgrade include the introduction of the fluid dashboard, which is the new user interface. This consists of updated navigations pages and tiles to access pages in PeopleSoft. Although functionalities will remain similar to what.
They are today the look and feel and ways to access will change.
Specifically, its position data and the accompanying approval process have changed significantly.
In the following ways that we're going to discuss in detail today.
The position approval tab is now only available to view historical 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 functions as a place for approvers to add their comments.
There is now a summary page which compares the proposed changes to the current position values.
Adding rows is no longer part of the approval process.
Instead, each position transaction is a single row, no matter how many approvals are received and as a result, approvers no longer enter an effective date or reason.
Code. The Notification Center will now be the place for necessary alerts and action items instead of a work list.
So after the completion of this course, users should be able to access the position approval, fluid pages, manage and view pending approvals, understand the position approval processing and navigation, and then we'll look at 3 walkthrough demonstrations to cover the topics of approving and denying positions as well as.
Pushing back transactions due to incomplete or incorrect information and a key item to note here is that the recycle action.
In today's system, is being replaced by the push back action.
This is the exact same purpose.
It's really just a name change.
So as a quick refresher, these are some of the terms that we are using throughout the L200 courses. The Fluid user interface adapts to different types of devices, including your smartphone, tablet, as well as working on your desktop. The home pages, also called 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, also called the Activity Guide.
Series of steps or actions that users can take to complete a specific business process. Essentially, an activity guide helps to streamline complex tasks by breaking them down into more manageable steps.
And tiles are shortcut buttons that help you quickly get to important tasks or information without searching through menus like you do today.
So as I mentioned before, position management and the position approval process have experienced significant changes with the upgrade.
However, it is important to note that while the how of position approval and management is changing, the underlying business processes have not changed, so transactions that require approval in the current system will require those very same approvals in the upgraded system and as in the current system.
Position Approvers will have the ability to approve, push back, or deny 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.
For the purposes of this course, we will be accessing the approvals tile through the workforce administrator dashboard as shown here.
The full navigation path is core C, T H RMS workforce administrator approvals.
The approvals tile will reflect the total number of approvals that are pending for that user with a total in the lower right hand corner of the tile.
Here you can see there are three total pending approvals.
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.
In this screenshot, there are four new positions under create position and three existing positions to be approved under manage position. Users can select the right arrow on each individual item to view further details and enable the desired.
Action positions can also be filtered from this page by requester, date, routed and from, meaning the most recent approver of that transaction.
Once you've selected a position to review, you'll be brought to the managed position page displayed here, and I'll note that this is different than the managed position tile

from which position transactions are initiated.
Here you'll see a summary under proposed changes that shows 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 all.
As proposed, changes, so this is also where you will take action on the position including excuse me using the approved deny or push back buttons that are shown in the upper right hand corner. We will see each of these actions at work later in the course.
And now we'll take a look at the several helpful links on this page that are available each time you look at a position.
The first of these links is view position details.
Which is bracketed in blue in the screenshot.
Clicking that link will open the pending position transaction in another window so that the approver can review all of the fields on the position row being considered for approval, not just those that have been 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.
You will then be prompted to return to the approval page to approve the position you've just edited.
And Please note Approvers will not be able to modify the effective date or reason code. So if those values are incorrect, the transaction would need to be pushed back.
Next, you may remember the new feature discussed in the position management course, which allows the originator to add attachments either as a document upload or as a note.
So if the originator has added either to the transaction, the managed position page will include attachment details, the approver can Click to open and view the note text or open the uploaded attachment.
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, you'll

see multiple users. As you can see in the screenshot. So then to view specific names and ***.
You would click multiple appro.
And 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 would enter their comments when approving, denying or pushing back a position. These comments will be added to the.
Approval chain.
We'll take a closer look at adding comments a little bit later on the course when we walk through examples of actually taking action on positions.
And an alternate way to access pending position approvals is through the notification Bell icon, which is right on your homepage. When you log in. If a new pending transaction is submitted that requires your approval, a green dot will appear just beside the Bell icon.
You can click on the icon and a list of items pending your approval will appear.
You can click on the link to be brought directly to the approval page for that position.
And once you do, the approval page will appear and function just as it does when access through the approval's tile like we just walked through.
So to summarize, the approval changes access to approved, deny or push back positions is now through the approvals tile, no longer the work list or alternatively the notification Bell icon on your home page.
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 if necessary on the pending transaction.
And the approval chain can be viewed by selecting the right arrow.
#4 on the screenshot.
So at this time, we will pause for questions. If you do have any, please post them in the chat.

KD **Klaben, Dianna** 11:32
Questions at this time.

JR **Jensen, Rosemarie** 11:34
OK.

CC **Catania, Cheryl** 11:38

Don't have any other rose.

JR **Jensen, Rosemarie** 11:40

OK.

Thank you. We'll move on.

All right, we'll now take a look at approving a pending position transaction.

From the core C TH RMS dashboard, 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 pending your review in the lower right hand corner.

Clicking the approval tile will bring the user to your pending approvals page and from here you'll select which position transaction you'd like to open by selecting the right arrow.

Once a position is selected, the managed position page will open for further details.

As we discussed, this page indicates a summary of the specific fields that were changed on the pending transaction, which is a nice feature.

So in this example, just the department and location code have been changed.

We have highlighted the approver comments box with #5 in the screenshot. So this is where the approver should enter any comments they wish before taking action on the position you will have another option.

To revise those comments in a moment.

These comments will then appear on the approval chain, along with a timestamp of when the approval was entered. As a reminder, there is no longer a position approval tab. The approval chain replaces that tab in the new system, so this is the only place that the approver add.

Their comments?

To view the approval chain for this position, you'll click on the right arrow, highlighted as number six in the screenshot. As an approver, you can quickly see who has already approved this transaction along with their comments. In this example, the agency personnel administrator has approved the transaction 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 approve.

Note that you are not adding a new row as you approve the position and as a result there is no need to enter an effective date with the higher effective sequence and no need to enter a reason code. Instead the entire position transaction will be a single row.
No matter how many approvals are required, that also means that newly established positions will retain the action reason of new throughout the entire approval process.
And then after clicking approve the approver comments box that we saw earlier from the manage position page pops up again.
So this serves 2 purposes.
One you can see that it's titled approve, so that gives you a confirmation of which button you hit and then it also gives you an opportunity to review the comments or make edits before you hit submit and it moves on to the next approver.
Once the position is approved by all required parties, the originator receives an alert on their homepage, indicated by a green dot next to the Bell icon. The originator can navigate to the manage position tile to view the approved action, and you'll notice that there's a link to the.
Approval chain from this view of the position as well.
OK.
We'll pause again for questions.

KD **Klaben, Dianna** 15:10
Have nothing so far.

JR **Jensen, Rosemarie** 15:12
OK.

CC **Catania, Cheryl** 15:15
I have nothing.

JR **Jensen, Rosemarie** 15:17
OK.
We'll have another opportunity towards the end as well.
OK.
So we'll look back or take a look at pushing back a position.
The navigation and most steps are exactly the same as approving a position.

Select the position you need to take action on from the pending approvals page.
Access 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 you'll be prompted again after clicking push back, as we'll see on the next slide.
And this is the comment. The pop up for comments that will appear after selecting push back.
Be sure to add comments in the approver comments box so that the originator knows what revisions are needed before resubmitting the position for approval.
And of note, as I mentioned, since Approvers can no longer modify the effective date or reason code if either of those fields need to be changed, the approver needs to push back the transaction and you would want to indicate that reasoning in the comments here.
Once comments are added, select submit pushing back a position returns a transaction to the originator, who will then have to review, update if necessary and resubmit.
Once the position is pushed back, the originator receives an alert on their homepage and then they can navigate to the manage position tile to view the position, which will show an approval status of rework to resubmit his position after it's been pushed back, the originator will need to.
Add a new row with any of the necessary changes.
And our last example will show how to deny a position request.
Again, you'll navigate to the pending approvals page through the approvals tile, and select the position to take action on.
Select the deny button which is in the middle.
Once deny is selected again, you'll see that pop up window display, confirming the action that you took and you have an opportunity to edit or add comments as to why the position is being denied. Once comments are added, you'll select submit and you'll see on the approval Ch.
That the chain is terminated.
And as with position approvals and and push back, the originator receives an alert on their homepage and the originator can navigate through the position management dashboard to view the denied transaction.
The approval status will show as denied and the position status as rejected.

At any time during the approval process or after receiving an alert that the position has been approved, pushed back or denied, users can check the status of a transaction by navigating to the manage position tile and that navigation path is core C, T, H RMS work.
Administrator position management, managed positions. So the same place that you navigate to to initiate a transaction.
Once landing on the manage create positions page.
You would search for a position by entering in all 8 digits, including the leading zeros.
Click the arrows on the right of the screen to open the position details.
And from the position details page, click the approvals chain link on the appropriate row.
The approval chain will open in a pop up showing who is already approved their comments, as well as the roles that still need to approve the position. The approver that is listed as pending currently has a position awaiting their approval.
The Approvers listed as not routed will receive the position for approval after the pending approval completes their piece.
And 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 reflect those multiple rows, so the position shown here has a pending reclassification transaction effective 10/4/2024 that was submitted through the new approval process.
The top row will remain proposed until it's fully approved.
At which point the approval status will change.
From in approval process to approved the approval chain link will remain available to anyone reviewing the position to see who approved and when, as well as their comments. But throughout all of that, no new rows will be added.
By contrast, the establishment of this position, entered in July 2023, is still comprised of multiple rows. In this case, the establishment was initiated effective 7/28/23 effective sequence 0.
And effective sequences one through three were added by the APPROVERS.
All of those rows will remain available for review in the upgraded system.
We've also discussed that the position approval tab has been replaced by the approval chain.

4 transactions approved in the current system that we're using today, the position approval tab will exist in the upgraded core as a view only feature and that's in order to maintain the position approval 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 there you'll see the same information that you see now in the current 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.
OK.
I think we've gotten a couple questions in the interim.

KD **Klaben, Dianna** 21:37
Yes. The first question is when a position is pending approval, will the agency see pending approval when searching for the position?

JR **Jensen, Rosemarie** 21:37
OK.
Yes, the position status is going to show in approval process, so it'll be very clear that it's it's not approved.

KD **Klaben, Dianna** 21:57
Question is, do the approvers need to approve an order?
Do they see where each approver is in the chain?

JR **Jensen, Rosemarie** 22:05
Yes, you do need to approve in order, which is the same as it is today.
It's not gonna route to the final approver until all of the lower level approvers have taken action on it.
So that's the difference between I mentioned that when you look at the approver chain approval chain, you can see that one of the approvers is listed as pending.
That's the person who it's currently with.
Any approvers after that?

Are not routed, so they haven't even gotten it in their approvals.
Tile to approve yet? So that's it going in order.

Klaben, Dianna 22:38
Another question is can we see the date approved on the main menu or do you have to open the approval chain to see the date approved?

Jensen, Rosemarie 22:46
You do have to open the approval chain.
That's not that information is not on the main menu.

Klaben, Dianna 22:53
Another question we have is when an approver is reviewing a position in their work list, will they be able to edit the position if needed? For example for a refill request if the refill indicator was not changed to six months and the initiator alerts the next approver can?
They change it.
Or do they need to push it back?

Jensen, Rosemarie 23:14
So there is a capability to edit a pending transaction, however.
If the edit results in a different routing of the position.
The system will stop you.
You'll get an error message and you would need to push it back so it it it depends what the field is being changed and actually that is the same as as today if you go in and an approver makes a change that's going to reset the routing or.
Require additional approvers.
You actually get an error pop up that stops you and you have to recycle it. So that'll function the same today. You'll get an error and you'll have to push it back, but if it's something that's not going to change the routing, you can make that edit and.
It'll continue on its way.

Klaben, Dianna 24:04
There are no more questions.

Jensen, Rosemarie 24:06

Thank you, Diana.

OK.

Catania, Cheryl 24:12

Have at the moment as well.

Jensen, Rosemarie 24:14

OK.

Thank you, Cheryl. If you do think of questions after we close the session, please feel free to submit a footprints ticket. If you have regular footprints access, you would do it the exact same way as you do for any other question. If you don't have footprints access you.

Can send your question to the readiness at ctgov.gov.

E-mail and then we'll be posting all the Q and as online.

So if you have something soon after this session, we can include it with that.

But thank you for joining us today.

Please complete the training evaluation that'll be posted in the chat.

The course material will also be posted in the chat and that will also be posted online on the course CT Modernization website, which has a lot of other helpful information, including L100 courses, infographics and any updates to the project that you might want to read about.

Thanks again for joining us today.

Klaben, Dianna stopped transcription