Transcript

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started transcription

Catania, Cheryl 0:51

Good morning, everyone.
We're going to start in just a minute.
We're opening up the lobby and letting everybody come in.
Hey, it looks like everyone has been admitted in from the lobby. So good morning.
My name is Cheryl Catania.
I am the program manager for the HR and time and Labor modules for core CT.
And today we'll be going over the personal data training course.
In this course, we'll cover the enhancements to PeopleSoft and how they will affect personal data processes. You were referred to this class as you have the HR specialist role. This means that you have the ability to create employees, add jobs as well as edit existing personal data.
Please feel free to ask questions and remain engaged while I provide an overview of the system changes.
Just a brief overview of the rules throughout the training, there was a prerequisite for this course.
So you are probably already familiar with this slide, but I'll go over it again anyway.
As the trainer, I'll be covering the course content, including discussing the new functionality.
I'll also be answering questions and maintaining a parking lot for a follow up if needed.
We have a separate facilitator who's sharing the presentation and managing time.
The facilitator will also direct questions from participants at the end of each section and share a survey when the course is completed.
As the participants, please ask questions in the chat, we did notice that in previous sessions, for some people, the chat feature is not available. If you're not able to submit questions in the chat, please send them directly to Rose Jensen through teams.
Her name is going to be listed in the chat for reference and she will take those

questions and include them into the meeting chat so we can go over them.
During the presentation, your name and your camera and microphone will be turned off.
So you won't have the ability to turn them on.
At the end of this course, you'll be able to navigate fluid tiles to add employees.
Update maintain employee data and create organizational relationships.
There is a list of terms that you may not be familiar with, but you may hear throughout the trainings for the upgrade.
These are the same terms that we probably discover discussed in the managed job course fluid user interface.
It's the new interface that adapts to different types of devices, such as smartphones, tablets, desktops, etcetera.
Home pages, 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.
Process this is a series of actions or steps that users complete within a specific business process.
Essentially, an activity guide helps to streamline complex tasks by breaking them down into manageable steps.
And lastly tiles.
Tiles are a shortcut button that helps you quickly get to important tasks or information without searching through the menu.
Here is a quick glimpse at the schedule for today's meeting.
Thinking this meeting will take us about 45 minutes to an hour, depending on the number of questions we receive.
And we will be covering changes in personal data, how to create an employee, add a person of interest as well as answer questions.
Slides will be an overview of the changes.
We will discuss the new fluid tiles and how they are broken out into different topics.
Review the differences between the current and new process of adding personal data and will be running through scenarios to directly show how a user would go about adding and updating employee information.
To navigate to the new homepage, you would start at the core C T H RMS homepage.
Click on the workforce administrator tile and from there you will click on the manage

human resource tile.
This will lead us to the section where we will view manage human resources home page.
This screenshot compares the navigation between the current system and the new fluid tiles.
In the current system, navigating to add a person, modify a person, and add concurrent employment involves multiple steps.
And the upgraded system, all tiles related to an employee's personal information and job information will be housed on one homepage.
There's a separate tile for each process, making it easier to follow.
New path which is displayed above is workforce. The core C T H RMS homepage, workforce administrator and manage human resources.
This shows you how the new tiles will be displayed once you are on the new home page. For this training, we're going to be reviewing the create employee modify person, create a person of interest and organizational relationship tiles.
There may be additional tiles on the screenshot that will not be available to you when the system goes live.
These tiles appear based on your security, which will not be changing.
As you can see, the screenshot also includes a managed job tile which was covered in the managed job course and you will see that all of the tiles related to an employee's job and personal information are now located on this one home page.
Here we have some definitions as the tiles are named differently than some of the items throughout the current menu path.
The first tile is create employee. This tile allows you to add an employee and link them to a job that they are performing.
This is the equivalent to add a person in the current system.
Quantify a person.
This tile allows you to add an employee and link them.
I'm sorry, modify a person is the tile that allows you to edit the personal details for an existing employee, which is the same as the modify today.
Create person of interest. This tile allows you to create a person of interest and assign them to a job.
We will be looking at this tile very briefly. The majority of users do not process persons of interest and will not have security access to it when we go live.
Organizational relationship. This tile allows you to add a job to a previously created

person or to add an additional job to an employee that already exists.
This is the equivalent to add employment instance in the current system.
The current system when you open modify a person, the different pages are in tabs that are set up horizontally across the top of the page in the new fluid system. When you open the tile for modify a person, the tiles are now located vertically on the left hand.
Side the same information is required to hire, but the tabs are slightly different.
The same information is in the upgraded pages, but there are small changes to the tabs which we will review in the hiring as.
We walked through a new employee hire.
Another change that I would like to review is a search page.
Here's an example of the search page as it appears today in modify a person at the top of the page, there is a section that displays your recent searches, and there is also an additional section where you can save specific search criteria.
In the upgraded system, the view of the search page is slightly different, but it contains the same search field such as ample ID and name.
The saved and recent search options are now in a more visible area.
Saved searches are still at the top of the page and functions the same as it does today.
The difference to the page is that now when you first open the search page, the last five employees that you search for will automatically appear listed at the bottom of the screen.
This allows for easy retrieval of an employee recently viewed all of the other fields remain the same. As I mentioned earlier.
There is another side by side example, and this one is the navigation and the page layout for creating a new employee.
Left side contains the current menu path and a screenshot when you start to add a person.
As in modify a person, the different pages are located in tabs placed horizontally across the top.
And the updated system when you first click the create an employee tile, you'll receive a screen that has a grayed out box for the employee ID.
The employee ID will be auto generated as it is today.
The tabs are now located vertically across the.
Now located vertically across the left hand side.

One key difference is the organizational relationship tab, which is currently the last tab while processing a new hire.
That tab is now separate and will be reviewing later in the presentation.
Now we will be reviewing the create an employee tile which is currently out of person.
While in the creating an employee pages you will notice that the process is handled in steps listed at the top of the page.
First, the personal information will be entered, followed by job. Once all the information has been entered, you'll be able to save the transaction.
The tab for each section is located on the left for easy access to specific pages.
As I mentioned, the tabs are slightly different.
The personal details section allows a user to edit personal details such as the name, date of birth, biographical details and national ID.
This was called.
This is called the biographical details page today.
Contact Information section allows a user to edit addresses, hone numbers and emails. The Regional Information section allows the user to edit the ethnic group.
More services, a new tab.
This allows the user to edit military status. The effective date of the change and the start and end dates of service and another new tab is the validation tab.
This is where errors will appear when the data will be deemed valid.
Let's take a closer look at each tab.
The first tab is the personal details section which contains fields like the name, date of birth, gender, marital status and national ID.
Both the biographical details and the national ID are available by clicking on the blue box for each section.
Both of these will appear in a pop up window.
The same edits that exist today will continue. For example, if you enter a Social Security number that is assigned to an existing employee, you will receive the same warning message that the social is already in use, and it will provide you the info ID that it is ***.
To.
Contact Information section allows our user to edit addresses, phone numbers and emails.
When you are adding an address for the first time, you will click on the arrow button

on the right to open the address detail page.
Adding an address is slightly different in this new upgraded system today. When you click on the blue link to add address details, it's located to the right of a specific address type in the fluid pages you will select the plus button.
Call the address type a pop up window will appear for you to select the address type that you want to update and also the fields that you can go and change the information on.
All types of addresses will be added or updated through this plus button.
Regional Information section allows users to add or update an ethnic group the same as today.
The War service section allows a user to edit military status. The affected date of the change, and the start and end dates of service.
This field was originally created to hold military service dates that may be used for longevity.
It's an informational only field and does not contain any rules.
Below the war service is the validation section which I will go over on the next slide.
But before I move on, I just wanted to point out that there are two tabs highlighted on the left and you can see information for both war service and validation on the. Page.
While in the personal data pages, all of the information is on one long page, you can use the scroll bar on the right to continue through the sections or use the tabs on the left to go to specific sections directly.
You've completed entering the personal information.
There's a validation section. When you click the next button to move to job, the validation process will first run and show any warnings or errors.
This will ensure that all necessary information and or fields have been completed for a person prior to moving to job. This validation replaces the pop up box that appears in the current system.
In this screenshot you can see there's an error that the name is required.
There are two types of messages, the errors and the warnings.
On the previous slide, we saw an error which needs to be resolved before advancing to the next page.
Here we see a warning which is an alert to tell you that something may be missing. However, with warnings you can check the box labeled.
Proceed with warning to move forward without updating the information.

Would you have checked the box that states proceed with warnings?
Click the next button.
A message appears briefly indicating that the personal details were saved successfully.
The system will then bring you to job data to complete the hiring process.
Notice that the step on the top has been updated to job data and an employee ID has been created which is displayed on the top left of the screen.
We will now be covering the job pages here as they were covered in the managed job prerequisite course.
With that said, there are two things that I would like to point out. While in create an employee.
You do have the ability to update the effective date and the action reason directly on the page, which is a different.
A different method of updating from adding a new row to an existing employee.
The other change is a location of the notepad.
Notepad is no longer located within job. Once you save the hire, you will need to navigate to the job action Summary page to enter your notes.
Would you have completed the job information and saved a confirmation page?
Will display indicating the transaction saved successfully from this page.
Users will be able to easily continue some additional pages that are normally completed along with the hire.
These include pages such as time reporter data or emergency contacts.
I'm gonna take a quick pause here and see if there are any questions on hiring an employee.

CZ **Canty, Zakiah** 19:02
Question in the chat it says does the contact Info tab allow changes to the emergency contact info as well as the regular contact info?

CC **Catania, Cheryl** 19:14
The emergency contact will still be located in the menu path, the same place that it is today, so the contact information and personal details is just the employee contact information and you would need to go to the employee contact page to update the employee's contact information emerg.
Contact information.

Canty, Zakiah 19:36

Second question, will employee entered addresses changes still go into our workflow?

Catania, Cheryl 19:45

If an employee submits an address change through self-service, yes, the same workflow that is set up today will still occur.

There will be an L100 course on approvals, so that course will show you where the transactions will go.

There's actually an approval tile and everything that goes to you for approval will appear in that tile, including employee name and address changes.

Canty, Zakiah 20:17

And that's it for the questions.

Catania, Cheryl 20:31

OK, we don't have any more questions on that portion.

I will continue on.

I'm sorry. There was another question that popped up.

No, that's fine.

I will.

Canty, Zakiah 20:43

Up.

Catania, Cheryl 20:43

I will answer that before we move on.

Canty, Zakiah 20:46

It says currently when we enter the personal information to get the employee number prior to employee hiring.

And then back out without attaching to organization.

Now, can we go ahead and update?

Go ahead and update the date for future hire.

Catania, Cheryl 21:08
So the first part of that question.
Yes, the same process will happen today.
Happen in the new system that happens today.
So when you're hiring an employee that we just went through, now when you complete all of the personal information and then you click submit and you go to job, it creates the ample ID. If you exit the page at that point, it will save the personal information and.
It will save the employee ID without adding them to a job.
I believe that's what you're saying, and there is now an organizational relationship button that will be used for that purpose. So we will go over that in a future slide.

Canty, Zakiah 22:01
OK.
I think we can continue, Cheryl.

Catania, Cheryl 22:04
OK.
Now I'm going to quickly go over, create a person of interest and the reason that I'm showing this is that there's one major difference between creating an employee and creating a person of interest.
The difference is that the requirement to select the person of interest type before continuing is right on the initial page. When you open up the create a person of interest tile.
The rest of the higher process is the same as the example we just walked through. As with that higher, there are multiple steps in the process.
The transaction starts with entering the personal data, followed by entering the job data. Once all the information has been entered and saved, you'll receive confirmation that your person of interest has been completed.
Most users do not use the person of interest tile, so although we are going through it, the majority of you will not have access to that tile.
And here are changes to the ad organizational relationship and this is going back to the question that was just asked.
This is a screenshot of today's menu path for add employment instance and will be

called add organizational relationship in the upgraded environment.
This is used to add an additional record to an existing employee.
It is also used to search for an employee where the personal information has been entered and saved without a job record being created.
After clicking the organizational relationship tile from the management resources homepage, search for the desired employee and all existing employee records will appear.
Notice that you're now able to view more information regarding the employee prior to continuing on in the process.
A nice feature is that you're also able to tell if the specific employee record is active in any of the jobs that appear on the page.
Add a new job.
Click the add organizational relationship which is located on the right of the screen.
Here is a screenshot of how the page looks after you've clicked the organizational relationship link.
A screen will appear where you must select the type of employment. The same you do today on the organizational relationship tab in personal data when hiring.
Most of you only see the option for employee based on your security access and that will be your only option here as well.
The system will assign the next sequential record number based on the employee's existing records.
Since you're creating a new record number, the action will default to hire and you will need to enter the correct effective date and reason prior to preceding.
And adding an organizational relationship, there are two steps versus the three for creating an employee. Since the employee already exists, personal data does not need to be completed in the transaction, starts in job. Something I want to point out.
Although we have seen what a new record will.
Be in the previous slide, it is not visible on the job pages when completing the transaction.
On saving the transaction, you'll receive a confirmation which will also include the new record number.
The same links appear when hiring a new employee, but for easy access to the pages.
Such as the employee contact time reporter data. The links are available on this page.
If no additional pages need to be updated, you can click the go to manage human resources and it will return you to the manage human resources home page.

During this session, you should have learned to navigate and access fluid pages and tiles, administer HR processes such as creating an employee, modifying a person, and adding an organizational relationship, and understand the changes from the current format to the new update.
This concludes the presentation for personal data and we can open it back up to questions if there's any.

Canty, Zakiah 26:59
OK. We have a question, it says.
Is person of interest the same as hiring?
A rehired retiree.
They show up person of interest on a direct deposit page.
I cannot type in the chat box.

Catania, Cheryl 27:18
Person of interest is used by retirement division.
That is mainly where it is used.
If you are hiring a rehired retiree into your agency, you would be hiring them as an employee.
So any active state employee that is used within the state agencies, those are all employees, the person of interest type is mainly used by retirement vision on retirement records.
Any other questions?
OK, it appears there are no more questions.
Link to the training evaluation will be posted in the chat.
If you could please take a few minutes to complete the survey, we would appreciate that the second link will bring you to the job aids that can be used for additional resources.
And the third link goes to the core CT modernization page, which is where?
Which is where we have the items such as change agent, meeting recordings as well as links to some of the registration items. This website will continue to be updated with more information as it becomes available.
That will conclude the presentation, so please take the survey and have a great day everyone.

Canty, Zakiah 28:58

We have a clap for you, Cheryl.

Couple of claps.

OK.

So if everybody can just take the survey, as she said.

That survey will be available for the next 5 minutes, and then I am going to close out the meeting.

Training.

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