L200PD003 - Personal Data-20241115_142639-Meeting Recording

November 15, 2024, 2:01PM

25m 2s

Reutter, Shanon M started transcription

CC **Catania, Cheryl** 0:06

Good morning, everyone.

My name is Cheryl Catania and I am the lead at core CT over the HR and time and Labor module.

And today, we're going to be going over the changes to personal data.

When this course will be covering the enhancements to PeopleSoft and how it will affect personal data processes, you are referred to this class because you have the HR specialist role, which means that you have the ability to create employees, add jobs as well as edit personal data feel.

Free to ask questions and remain engaged while I give the overview of the system changes.

Some additional information for this training. We do have a couple of extra things that have come up since we first started the training.

The accessibility capability is now available on the webinar.

It must be turned on by users individually, and our core CT training page is now available and updated. The link for this will be available at the end of the course.

A brief overview of the roles throughout this training. As a trainer, I'll be covering the course content, including discussing the new functionality.

I'll also be answering questions after each section.

We also have a separate facilitator who will be sharing the presentation and managing the time, and we'll also direct questions from participants at the end of each section and share a survey when the course has been completed.

As a participants, please ask questions in the chat.

We have noticed that some people the chat feature is not available.

So what we're going to do is if you, if you can submit questions, please submit them in the chat.

If not, you can send your questions directly to Rose Jensen's through teams. She's going to put her name in the chat for reference, and she'll include the questions as

they come in during the presentation, your camera and microphone have been turned off, so you won't have the.
Ability to turn them on.
At the end of this course, you will be able to navigate fluid tiles to add employees.
Update maintain employee data and create organizational relationships.
Some of the key terminology that you will hear throughout the courses is fluid interface.
This is a new interface that adapts to different types of devices, such as smart phones and tablets.
Home pages, sometimes referred to as dashboards. These are a collection of tiles that users can Click to access transactions.
They 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 tasks by breaking them down into multiple steps.
Tiles are shortcut buttons that help you quickly get to important information without searching through menus.
There's a glimpse at the schedule for today's training.
It should take about 30 minutes, depending on the number of questions we'll be covering changes in personal data, how to create an employee, how to create a person of interest.
Add an additional job as well as answer questions.
Next few slides will be an overview of the changes. We'll discuss the new fluid tiles and how they're broken out into different topics.
Review the differences between the current and new process for adding personal data, and we'll be running through scenarios to directly show how a user would go about adding and updating employee information.
Navigate to the new homepage.
You will start at the core C T H RMS homepage.
Which you see as number one in the drop down menu. You'll click on the workforce administrator tile and from there you will click on the manage human resources tile.
This lead you to the section where we will view manage human resources homepage.
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 involve separate menu paths.
In the upgraded system, all tiles related to an employee's personal and job information will be located on one home page.
There's a separate tile for each process, making it easier to start the appropriate one.
New path which is displayed above is corset, hrms, workforce administrator, management resources.
There's screenshot of how the new tiles appear once you are on the manage Human resources homepage. For this training, we'll be reviewing modify a person, create employee, create person of interest and organizational relationship tiles.
There may be additional tiles on the screenshot that will not be available to you when the upgrade goes live.
These tiles appear based on on your security, which should not be changing.
As you can see, the screenshot also includes the managed job tile.
Which was covered in the managed job course. All tiles related to an employee's job and personal information are now located on this one home page.
This slide goes over the definitions for the tiles as they're named differently than some of the items through the current menu path.
They create an employee tile allows you to add an employee and link them to a job that they will be performing.
This is equivalent to add a person in the current system.
Modify person tile allows you to edit personal data for an existing employee.
Create person of interest. Tile allows you to create a person of interest and assign them to a job.
We'll be looking at this very briefly.
The majority of users do not process person of interest and will not have security access to it. If you do not today.
An organizational relationship.
That tile allows you to add a job to a previously created.
Previously created person or to add an additional job to an employee that already has one.
This is the equivalent to add employment instance in the current system.
There's a side by side look at personal data.
Currently, when you open modify a person, the different pages are located on tabs sit up horizontally across the top of the page.

And the new fluid system, once you open the tile for modify a person, the tabs are now located vertically on the left hand side. The business process for updating personal information remains unchanged. The same information is in the new fluid pages, but there are small changes to the.

Tabs.

To a review while we walk through hiring an employee.

Another change I want to point out is the search page.

Here's an example of a search page as it appears today in modify a person. The most common search fields used are employee ID and name above the search field.

Criteria is a drop down menu.

For recent searches, this will display the last five employees you searched for.

There's also an additional section to the right where you can save specific search criteria.

In the upgraded system, the view of the search page is slightly different, but contains the same search field such as employee ID and name.

Saved searches is still at the top of the page and functions the same as today.

The recent searches is no longer a drop down at the top of the page when you first open the last five employees that you search for will automatically appear at the bottom of the screen.

This allows for easy retrieval of an employee that you recently viewed.

Here's a comparison of the page layout for creating a new employee. The left side contains the current page that opens when you are hiring an employee through add a person.

As in modify a person, the different pages are located in tabs placed horizontally across the top. In the upgraded 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 when the hire is completed.

Upon click and continue, the personal data opens and you will notice that tabs are now located vertically along the left hand side, the same as modify a person.

One key difference is the organizational relation tap relationship tab, which is currently the last tab while processing a new hire is no longer on this page, it is now a separate tile and will be reviewing this later in the presentation.

I'll be reviewing the create an employee tile.

While in the create 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 of 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.
Here's a quick overview of the tabs on the page. The personal details section allows user to edit personal details such as name, date of birth, biographical details and national ID.
This is the biographical details page today.
Contact Information section allows a user to edit addresses, phone numbers and emails. The Regional Information section allows a user to edit ethnic group.
More service is a new tab. This section allows a 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 you would check for any errors prior to moving to job.
We're gonna take a closer look at each tab.
The first tab is the person details section which contains fields such as name, date of birth, gender, marital status and national ID. As you can see in the screenshot, the section for name is now available on the main page and you no longer need to click a link.
To enter it.
The biographical details and national idea are available by clicking on the blue box for each section.
Both of these will appear in a pop up window to populate once you've entered the information in these fields, the blue box will no longer display and the data will be visible on the screen.
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 still receive the same warning message that the social is already in use and the message will contain the employee ID it's assigned to.
Contact Information section allows a user to edit addresses, phone numbers and emails. When you're adding an address for the first time, you'll click on the arrow button on the right to open the address detail page.
Updating or adding a new type of address is slightly different today. When you click on the blue link to add address details, it's located on the right of the specific address type.
In the fluid pages, when you select, you'll select the plus button above the address

type.
Window will appear for you to select the address type and update the information.
All types of addresses will be added or updated through the plus button.
As with the previous tab, once you've entered information for address, phone, or e-mail, the information will appear on the page.
The Regional Information section allows a user to add an ethnic group the same as today.
The War service section allows a user to edit military status. The effective date of the change and the start and end dates of service. This field was created to hold military service dates that may be used for longevity and informational only field and does not contain any R.
And before I move on, I just wanted to point out that there are two tabs highlighted on the left and you can see the fields for both war service and validation while in the personal data pages.
All of the information is on one page.
In addition to using the left hand tabs to move through the sections, you can also use the scroll bar on the right hand side of the page.
We've completed entering the personal information.
There's a validation when you click the next button to move to job, the validation process will first run and show any warnings or errors.
This ensures that all necessary information or fields have been completed for a person prior to moving to job.
This validation replaces the pop up box that currently appears.
In this screenshot we have an error that the name is required and the message that the validation failed.
There are two types of validation messages.
There are errors and warnings on the previous side. We saw an error which will need to be resolved before advancing to the next page and steps.
Here we see a warning which is an alert to tell you that information may be missing.
However, with warnings you can check the box labeled.
Proceed with warning to move forward if the information that was entered is correct.
Would you have checked the box that states proceed with warnings?
Click the next button.
A message appears briefly indicating that personal details were successfully submitted.

System will bring you to job data to complete the hire process.
Notice that the steps on the top have been updated to job data and an employee ID has been created which is displayed on the top left side of the screen.
We're not going to be covering the job pages here as they were covered in the managed job prerequisite course, but with that said, there are two differences that I would like to point out.
While and create an employee, you do have the ability to update the effective date and the action reason directly on the page.
Which is different from when you're adding a new row to an existing employee.
The other changes the 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 the notes.
Once you've completed the job information and saved a confirmation page will display indicating the transaction saved successfully.
From this page, you'll be able to easily continue to some additional pages that are normally completed along with a hire and this include such pages as a time reporter, data and emergency contacts.
OK, I'm gonna take a quick pause here to see if there are any questions on the updates or hiring an employee.

Reutter, Shanon M 17:06
There's nothing in the chat.

JR **Jensen, Rosemarie** 17:13
Don't anything either.

CC **Catania, Cheryl** 17:16
OK.
OK. As I mentioned earlier, the majority of you do not use the person of interest type.
You will only have access to the tile if you use this process today.
For those who do use it, I wanted to point out one difference between creating an employee and creating a person of interest.
You will now be required to select the person of interest type before continuing on to create the employee ID.
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 person.
Data followed by entering job data. Once all information has been entered and saved, you'll receive a confirmation that your person of interest has been completed.
I'm going to talk about the organizational relationship tile.
This is used to add an additional record to an existing employee, such as a dual employment situation.
It's also used to search for an employee where the personal information's been entered and saved without the job record being created.
Here's a screenshot of today's menu path for add employment instance in the upgraded environment.
This is now located in the add organizational relationship tile.
The organizational relationship tile is located on the manage Human Resources homepage. After entering the search criteria, all existing employee records will appear below.
Notice that you're now able to view more information regarding the employee prior to continuing on in the process.
A nice feature that's new is that you can now see the active or inactive status right from this page, and you don't need to open each record individually to get this information.
To add a new row, click the add organizational relationship located on the right of the screen.
Just a screenshot of how the page looks after you've clicked the tile.
The ad organizational relink link. A screen will appear where you must select the type of employment the same way you do today on the organizational relationship tab and 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 employees existing records.
Words.
And adding an organizational relationship, there are two steps versus A3 for create an employee. Since the employee already exists, personal data does not need to be completed and the transaction starts in job.
Something I wanted to point out, although we've seen that the new record will be on

the previous slide, it's not visible on the job pages while you're completing the transaction.
Upon saving the transaction, you'll receive a confirmation which will also include the new record number.
The same links appear as when hiring a new employee.
So you have easy access to pages. You may need to update, such as time reporter data 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.
So in summary, during this session you should have learned to navigate and access the fluid pages and tiles.
Administer HR processes such as creating an employee and adding an organizational relationship.
Understand the changes from the current format to the new format.
And again, I will stop and if anybody has any questions, please post them in the chat.

Reutter, Shanon M 21:39
It looks like there's a couple.

Catania, Cheryl 21:42
I.

Reutter, Shanon M 21:43
If currently we have to switch APO Box and home address, will we still have to do this?

Catania, Cheryl 21:53
Understand that question.
You have to switch Apo box and a home address.

Jensen, Rosemarie 21:59
There's a little bit more context for that in the second comment.
We usually, yeah, we usually have to have the home address as the PO Box.

Reutter, Shanon M 22:04

OK.

Go ahead, rose.

JR **Jensen, Rosemarie** 22:09

Will we still have to do this?

CC **Catania, Cheryl** 22:16

You know, I have to get.

I have to get back to you on that one.

There's no change in the rules of how the information is entered.

PO Box as the home address. I will have to check on that. I thought home was street, but I will.

I will double check on that.

The process today will continue in the in the new system, there are no rule changes.

Reutter, Shanon M 22:45

OK.

And then there's another one.

Can you create a new employee without completing job data at the same time?

Some agencies responsibilities.

CC **Catania, Cheryl** 22:56

Sorry, Shannon. You broke up.

Reutter, Shanon M 22:59

Oh, I'm sorry.

Can you create a new employee without completing job data at the same time?

Some agencies split these responsibilities.

CC **Catania, Cheryl** 23:08

So the answer to that is yes.

Same as today, you will go in to create an employee, fill out the personal data information and save it.

It will assign the employee ID at that point same as it does today, and then when you're ready to complete the job, you'll go to the organizational relationship tile, which is the same as your ad employment instance today, and you can complete the job information for that employ.

Reutter, Shanon M 23:36
OK.
That's all I see for questions.

Jensen, Rosemarie 23:42
That's all I had.

Catania, Cheryl 23:47
OK, if there are no more questions.
Post follow up if you have any questions that you think of. While you know after the course is completed, you can always log the footprints ticket with your question.
It will be directed to the appropriate team and we can answer whatever questions that you have.
If you don't have access to footprints, you can also set it to the, send it to the readiness at ct.gov e-mail address.
And that concludes the personal data course.
There will be a training evaluation that will be posted into the chat by Shannon.
So if you could all take a moment and complete that the course material will be posted online.
There's also a link there to the training material on the course CT website and the modernization website has more information.
And it is continually updated with new job aids and new information that may be very helpful.
For you during the upgrade.
And that will conclude the training.
Thank you everyone for coming.

Reutter, Shanon M stopped transcription