Transcript

October 8, 2024, 1:02PM

Jensen, Rosemarie 0:04
Good morning, everyone, and welcome to the position management L200 course.

Catania, Cheryl 0:09
House.

Jensen, Rosemarie 0:09
Yes.

Catania, Cheryl 0:10
I'm not sure they're in yet.
They're just coming in.

Guarino, Dustin 0:15
So it's a matter.

Jensen, Rosemarie 0:35
OK, it looks like we've got about 100 plus people. So we're gonna get started.
Good morning, everyone.
Welcome to the physician management L200 course.
My name is Rose Jensen.
I'm the principal HR specialist with the core HR team.
Today we'll be reviewing the changes to position data that are coming with the upgrade. There are some significant changes to the functionality, look and feel of position data that we will explore today.
So in this course, we'll be covering the new upgrades to PeopleSoft and how they affect.
Position management processes.
We ask that during this course you remain engaged by asking questions.
I will be pausing several times throughout the presentation to take questions.
This webinar functions a little bit differently than the teams meetings. You might be

used to, so here's a brief overview of the roles for today. As your trainer, I will be covering the course content, including discussing the new functionality and answering any questions at the end of each.
Section. And we also have a separate facilitator who is sharing the presentation, managing our time and the facilitator will also direct questions from participants to the trainer. At the end of each section.
And as the participants, please do ask questions in the chat.
Throughout the training, as you won't able to turn on your camera or your microphone.
That said, yesterday we discovered an earlier training that some participants can't use the chat in the event.
So if that's the case, you can direct your question via chat directly to Cheryl Catania.
And then as a last resort, if we can't get to your questions in the chat, you can e-mail readiness@ct.gov who will be assembling AQ and a that will be posted online.
For the class.
So here's a glimpse at the schedule for today. The presentation itself will take under an hour, but we've built an extra time for questions which, as I mentioned, will address in several designated breaks.
Here are some of the specific items we'll be looking at today. Some of the changes due to the pump upgrade are a new user interface, new navigation for position data, changes to the steps for managing and creating positions, a new activity guide process which we will explain in.
Detail and the clone position feature which replaces the initialize function that you may be familiar with now in the current system.
So here's a list of terms that you might not be familiar with, but I'll be using these terms today throughout the duration of the training.
They'll also be used in other trainings.
The Fluid user interface is a new interface that adapts more readily to different types of devices.
Like smart phones, tablets and your desktop homepages are a collection of tiles that users Click to access transactions.
These serve as a personalized entry point for different types of activity.
And a guided process which we also call an activity guide, is a series of actions or steps that users can complete within a specific business process.
Essentially, an activity guide helps to streamline complex tasks by breaking them

down into more manageable steps.
And tiles are a shortcut button.
This is a brand new feature in the fluid interface that helps you quickly get to important tasks or information without needing to search through menus.
So now we will dive into the user interface changes.
We'll look at the navigation, how you get around and the different navigation paths.
We'll look at the managed position and administer position tiles, what they look like and what they're for. The new position management activity guide and then we will do a brief touch on approvals, but as.
You may know there is a separate L200 training course available later this month.
That's dedicated specifically to discussing the position approval process in more detail.
Go to get to position data in the upgraded core system.
You'll follow the navigation path on the screen.
You'll start the core C TH RMS homepage, which can be found as a drop down option in the upper left. Once you sign in and then you'll click on the workforce administrator tile and from there you'll click on the position management tile which brings you to the POS.
Management homepage and you'll note that the position management homepage has two tiles.
The manage position tile.
Critical tile that will be used for both creating and updating position data.
This essentially replaces the add, update position Info page in today's system.
And the administer positions tile can be used to either view a summary of all changes on a single position, or to see the history of the incumbents of a given position in these pages via administer positions or read only.
So you cannot make changes there.
One of the major changes with the upgrade is the introduction of the position management activity guide.
This is the new easy to follow process that's meant to help the user ensure all necessary information has been entered when you're either creating a new position or updating existing position data. The Activity Guide is located on the left hand side of the page and you'll notice that.
The names of the tabs are very similar to the tabs in the current system.
However, the tabs are now oriented vertically.

Set up across the top of the page.
And each step will indicate if it has been visited, not started or completed. And in this example only the 1st tab called position data has been visited and it's important to know that you can't move forward to the next tab on the activity guide until all required steps.
Those that are marked with an asterisk are completed.
Another major change is that position approvals will no longer exist on the position management pages.
Instead, approvals will now be accessed via the approvals tile, which is located on both the Workforce Administrator homepage and the manager self-service homepage.
That means that pending positions will no longer be accessed through the user's worklist. And as I mentioned earlier, we will dive into this in a lot more detail in the position approvals L200 training course.
Alright, so we will move on to discussing creating positions.
So to create a new position, you'll need to navigate to that manage position tile and that navigation path again is a core C TH RMS homepage, workforce, administrator, position management and manage position.
So we have a few key things highlighted in the screenshot highlighted as #1 is the add new link on the manage position page, you would click that link and you'll see that the effective date marked as #2.
Will populate with today's date.
And that will need to be changed on this screen before proceeding as once you begin the activity guide, which I'll show you in a moment, you can no longer change the effective date you'll notice highlighted is number three that the effective sequence will default to 0 just like.
Today. So if after this establishment is approved and you have additional actions with the same effective date, that sequence will need to increase.
Marked as number.
Actually it's not marked separately.
I guess the reason code will show as new. This can't be changed for new positions. However, as we will discuss in the position approvals course, approvers don't need to add a new row when they approve position transactions. So there won't be a need for them to change this.
To est as they do today. That's kind of a big change.

And you'll know also that the position number field appears with all zeros.
So, just as in today's position data.
You can't pick the position number. The system will assign it after you've submitted it for approval, and then once you've confirmed the effective date is correct, you'll click the add button and that is highlighted as #4 to proceed to the activity guide.
OK.
So the first step in the guided process is the position data tab and the very first field here is the refill indicator, which will default to manual.
You'll need to be sure to change this to six month or auto in order to hire or transfer an employee into this position after it's approved. And please know also that the track recruitment check box is now available in this position information section.
As you can see in the screenshot, bracketed in blue, that's a change from where it is now.
Information tab.
Next, we'll proceed through the rest of the position Data tab, job coding department.
Our required fields, just as they are today.
And they're marked with an asterisk on the activity guide to enter the job code.
You can either click the magnifying glass to use the look up screen or you can manually type in the job code. Once you select that job code, many of the other fields will populate including title, salary, plan information, union code, and standard hours.
And you must also elect a department.
So you click the magnifying glass.
To use the lookup function or you can enter it manually if you know what it is and be sure to adjust the location code if it's different than the default associated with the department.
Finally indicated with the number four on the screen shot is the description.
This replaces the detailed position description link that you're familiar with today.
Here is where you will still enter in the position justification. While this is no longer opening into a separate pop up like the link does today.
The box can be expanded by clicking and dragging the bottom right hand corner, so you'll still be able to fit in your full justification right here.
This slide highlights that some of the fields currently on the specific information tab in today's system are now consolidated onto the position data tab.
And once you're ready to move to the next tab of the activity guide, you can either

click directly on the next tab. In this case additional information, or you can click the next button that's in the upper right hand corner.
The education and government section, which is currently in the specific Information tab in today's core, will now be within the additional Information tab, but the functions are the same.
So here's where you'll enter in the FTE value and you'll select the adds to FTE actual account if applicable.
The next tab of the Activity Guide is the budget incumbents tab.
You don't need to enter any information here when you're creating a new position, but once an employee is hired, this page will populate with their name, employee ID, and employee record.
And it's also going to have a direct link to the incumbents job data.
So this function's really exactly the same as you're familiar with now.
The 4th tab is where you'll enter the funding information for this position. You'll select the combination code by either using the look up to search by certain chart fields or you can paste in the combo code in fall if you have it available, you'll enter in a percent.
Into the percent of distribution field highlighted as #2 whether the position is single or split funded, the percentage here needs to equal 100 in order to save this transaction.
If you have a funding end date, you'll select it using either the calendar icon.
Or manually entering it and that's highlighted as #3 and then if you need to add or remove a combination code, the plus and minus buttons are in the upper right hand corner highlighted as #4.
A brand new feature in position data is the ability to add attachments whenever you create or update an existing position.
This is its own tab.
It's fairly intuitive, but to add an attachment you would click the add attachment button and then click on my device to select the file that you want to upload.
You'll be able to give it a unique description that all viewers to the position will be able to see.
Alternatively, on this tab, there's also a add note button.
That's just another place for the originator of the action to add details about the transaction and you would click the add Note button, enter in the description and note text and then click done.

The last step of the activity guide is to review and submit tab.
This is your chance to look at the proposed changes and if you see that additional modifications are needed, you can navigate back to the appropriate tab to make changes before submitting.
So here you review the key information table and confirm the details are correct, and then you'll click the submit button in the upper right.
After clicking submit, you'll get a green pop up with a position confirmation.
It'll indicate that the request has been submitted for approval. If the position transaction requires approval, this page will display the list of all the approvals that are needed for that transaction by roll.
But the example here doesn't show or excuse me doesn't require any approval so you won't see any approvals listed.
We'll see an example of that later on.
After submitting the new position, you can navigate back to the position details page via the manage position tile. To view the approval status.
So this example is a new position that does require several steps of approval.
You can see indicated as number one that the approval status is in approval process.
You can also click what's called the approval chain link.
That's indicated with #2 to see where exactly the position is along the approval path.
It's important to note here that this replaces the position approval tab in the current system where approvers write comments as they approve, deny or recycle the position.
The new approval chain includes the roles of each required approver and you can click on the blue link to view the specific employee name and title of the person or people with that approval role for your agency.
The approval chain is also where the approver comments will appear.
As well as the timestamp of when the approval was made.
OK.
So now we'll pause to take some questions.
So please enter them into the chat if you're able.

GD **Guarino, Dustin** 16:03
So far so good. No questions.

JR **Jensen, Rosemarie** 16:06

OK.
Thank you, Justin.
Just give it another moment.

GD **Guarino, Dustin** 16:14
See someone has their hand up.
You're not gonna be able to speak, so you'd have to type your question in the chat.

CC **Catania, Cheryl** 16:30
And also I'll put my name into the chat. You can type me directly through teams with a question. If you are not able to do it within the chat of the meeting.

JR **Jensen, Rosemarie** 16:57
I think we'll move on for now.
And then sage, if you if you needed to send your question to Cheryl, we will have another opportunity for questions. So we could address it there.
All right. So we're moving on to modifying positions.
To modifying existing position you will also need to navigate to the all important managed position tile. You'll search for an existing position by using any of the field shown above which mirror the fields that are available in today's score. But there are two key differences from today's search.
Functionality. The first is if you are searching for a specific position number, you do need to enter in all 8 digits, including the leading zeros.
And the second change is if you're searching by department, you will also need to include the business unit.
So that's agency, university, judicial and so on. Once you've entered in your criteria, you'll click the search button and then from the search results, you can click the arrow on the right hand side of the position that you've chosen to update, and a nice new feature with the.
Upgrade is that the?
Search page here will list automatically the five positions you most recently searched.
So if you are checking on a position repeatedly or need to access something again that you very recently accessed, it's going to be right there for you.
You will now be able to create a new position via cloning an existing approved position.

This allows users to create a new position with most of the fields already populated, which will save you some time. The clone button replaces the initialized feature that you might be familiar with today, and again, the same navigation Corsi, T, H RMS, workforce, administrator position manage.
And managed position.
You'll need to identify.
An existing approved position in order to start that clone process.
So you'll click the arrow to access the details of the selected position, and then click the clone button to begin and that's in the lower screenshot, bracketed in blue.
Once the position has been cloned, you'll follow most of the same steps as. Create a position and make changes where applicable, just like with creating a position, you will need to visit each step of the activity guide to ensure that all required fields are completed. You'll select an.
Effective date. Note you cannot change the effective date after the activity Guide has started.
The reason code will populate here with new once you have that secured, you'll click the continue button.
And then once on the activity guide, you can make any changes you need to the original cloned position.
Note that the key fields will already be populated, including the job code and department, and then you'll click the next button to continue through the Activity Guide Steps.
You will need to select A combination code when cloning a position as it doesn't populate from the existing position.
So on this tab you'll follow the same steps as when creating a brand new position.
You can either click the magnifying glass to look up a combination code by chart field, or you can paste a complete code in here if you have it available.
So once you've completed all the steps, including a position, you will need to review and submit the request.
After clicking submit, you'll see that a position number has been generated and you'll receive a confirmation message that your request has been submitted for approval.
The approval chain listing all of the required approval approvers, if applicable, will appear right here on this confirmation screen.
So next we'll look at an example of modifying an existing position, in this case by changing the job code.

The navigation is the same for C TH RMS workforce, administrator position management manage position.
You'll need to enter your search criteria or position number.
If known, click search to pull up the results.
Click the arrow button to access the position details page.
And then click the add row button on the right of the page highlighted as #4 in the screenshot.
We will then need to select an effective date and look up and select the reason code. You can either use a magnifying glass or if you know what the code is, you can enter that manually.
And again I I wanna mention that both the effective date and reason code can only be changed right here before clicking the continue button to get to the activity guide. If you realize that you have entered the wrong effective date or reason code, you would have to go.
Back and start over.
So that is a notable change, which is why I've mentioned.
Times. So once you are confident in your effective date and reason code, click the continue button.
And in the Job information section of the position data tab, look up and select the new job code that you need by using the magnifying glass or entering it manually. Then if required by your agency, enter a justification for the reclassification into the description box and then complete review and submit the transaction, which will be routed to the appropriate approver for review. Depending on your agency's rules.
You can also search for existing position transactions and see all of the historical transactions on a given position.
To do so, you'll navigate to that manage position tile and mark the include history checkbox.
When you enter in the existing position number, you'll click search to pull up the results and then you can click the arrow button to access the position details page.
And you'll note that the activity guide we've discussed in earlier units does not apply when you're reviewing an existing transaction. That's only for adding a new position or adding a new row.
So when you are viewing something that already exists.
All of the position information will appear on a single page and that's the screenshot that's on the right here.

So this is a very different look than you're used to.
Now it has all of the same information, but instead of tabs it has different headings.
Can be collapsed or expanded, so you'll need to be sure to Scroll down through the page to make sure that you're seeing all the details of the position. And one important thing to know is on this view, the funding information is the very last header.
And then to toggle through the different rows of the position, you can use the previous button or the next button, and that's bracketed in the upper right hand corner.
OK.
Well, that completes our review.
Should be able to now access position management, fluid pages and dashboards, managed positions for both new and existing positions.
We talked about cloning positions and how to review a transaction status.
OK.
So now I'm happy to take some questions.

GD **Guarino, Dustin** 24:28
So there is one in the chat.
I think I sent it to Cheryl.
It's will the approval process take the place of ukg or will we have to continue doing that as well?

JR **Jensen, Rosemarie** 24:39
Changes to that.
So if your agency is one where you have the agency approvals in Ukg and then you use your pcnid to kick off a refill request or a new position that will remain exactly the same.
So.

GD **Guarino, Dustin** 25:11
Alright, the next one I see it, OK.

JR **Jensen, Rosemarie** 25:13
Yep, I see it. Thank you.

So this is a change here.
So no, you cannot change the recent code to new.
But you don't the way that the position approvals work now and this is a big change that honestly took me some time to wrap my head around.
Instead of an approver, adding a new row where they would then need to make sure the reason code was est instead of new. Now approvals for a transaction are all on one row.
So for a new position, the reason code will remain as new for every approval and there is not an opportunity for the approver.
To need to or or they just can't change that recent code anyway.
So instead, we'll just be leaving it as new.
OK.
So we have.
Another question regarding the ukg.
So yes, you're still going to use two different logins.
You're going to have your regular core login, and then you'll have your PCN login for items that have gone through ukg approval.
So that's exactly the same.
And yes, you will still have a third core login for statewide view access.

GD **Guarino, Dustin** 26:56
That might be it for the questions.

JR **Jensen, Rosemarie** 26:58
OK.
Alright, great.
Well, thank you everyone for coming today.
Thank you for participating. That completes our course.
We do have a link to a training evaluation that will help us.
We're just getting started with training, so your feedback is appreciated.
The course material will be posted in the chat as well as on a new training page that's currently in development, along with other job aids.
And finally, to access more information about the upgrade overall, please visit the core CT modernization site.
And thanks again for your participation.

CC **Catania, Cheryl** 27:38

Rose, we did have one more question up here.

JR **Jensen, Rosemarie** 27:40

Last minute. OK. Yes, the same errors that you would see today.

Are are gonna be functional in the new system?

So you would get a pop up before you you try to save. If there's an error that's stopping the transaction from being saved.

GD **Guarino, Dustin** 28:02

If possible, please fill out the survey if you can before you leave, as the chat will close once the meeting is ended. Thank you.

CC **Catania, Cheryl** 28:02

Just one moment.

I do have a question that just came in regarding that, Dustin.

GD **Guarino, Dustin** 28:22

That's a great question.

If you if you wanna send your name to Cheryl, we can forward it out to you.

The link to the survey.

JR **Jensen, Rosemarie** 28:46

Yes, that'll be shared in the chat and it's also going to be posted online.

CC **Catania, Cheryl** 28:58

Someone. Oh, let me throw this in there.

Thank you, Noreen.

JR **Jensen, Rosemarie** 29:21

To my knowledge.

CC **Catania, Cheryl** 29:22

It appears that the chat does work if you click on it through here, you just cannot

type the chat.
I'm sorry, the survey you can still link to the survey.
You just can't type question.

JR **Jensen, Rosemarie** 29:38
The question regarding training for payroll staff, my understanding is that there's not specific training trainings for L200 trainings for payroll staff.
Is that your understanding Cheryl or or Dustin?
I don't think that payroll is having the major changes to their pages like HR is.

CC **Catania, Cheryl** 29:59
Correct. I believe all of their training will be in the L100 that will be posted on the core website.

JR **Jensen, Rosemarie** 30:13
Lindsey I hopefully your question was answered.
I saw that you liked it, but it will be posted online if you can't get it in the chat.

GD **Guarino, Dustin** 30:23
Everything's gonna go to the modernization page with all the trainings.
I think if you don't have any other questions and you filled out the survey, then you're free to go and enjoy your days.

JR **Jensen, Rosemarie** 30:51
Thank you everyone.

Guarino, Dustin stopped transcription