Transcript

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JR **Jensen, Rosemarie** 0:04

OK.

Good morning, everyone.

Welcome to the position 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.

In this course, we'll be covering the new upgrades to PeopleSoft, specifically how they affect position management processes, and we ask that during this course, you remain engaged by asking questions.

I will be pausing several times throughout the presentation to address any questions that come up.

This webinar functions a little bit differently than teams meetings that you may be used to, so here's a brief overview of the roles for today's training.

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

I'll also be answering the questions at the end of each section.

We have a separate facilitator who is sharing the presentation, managing our time, and she will also be directing questions from participants to me at the end of each section. And then as the participants, please do ask chats, excuse me, ask questions in the chat throughout the training as.

You won't be able to turn on your camera or microphone.

Please note we are aware that some participants are not able to use the meeting chat. If that's the case for you.

You can direct your question directly via teams chat to Cheryl Catania, who will put her name in the meeting chat for everyone to read.

Alternatively, you can e-mail readiness@ct.gov.
Who will be assembling AQ and A to be posted after the class online?
So here's a glimpse at the schedule for today's training. The presentation itself will take under an hour, but we've built an extra time for questions.
Which again will take in a few designated breaks.
So here are some of the specific items we'll be looking at today.
Some of the changes due to the pump upgrade include a new user interface, new navigation for position data, changes to the steps for managing and creating positions, a new activity guide process.
And the clone feature which replaces the initialized function that's available today.
So this is a list of terms that you may not be familiar with, but these terms will be used throughout the duration of this training as well as other courses for the upgrade. A fluid user interface is a new interface that adapts more readily to different types of.
Devices including a smartphone, tablets, mobile phone, as well as your desktop homepages are collections of tiles that users can Click to access transactions.
These serve as a personalized entry point for different types of activities.
A guided process, also referred to as an activity guide, 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 more manageable steps, and tiles are a shortcut button that help.
You quickly get to important tasks or information without navigating through menus.
So let's dive into the user interface changes.
We'll be looking at navigation, how to get around and the different navigation paths in the new system.
The managed position and administer position tiles what they look like, what they do, and the new position management activity guide and then we will do a brief touch on approvals. As you may know, there is a separate L200 training course that will be holding later this.
Week that's dedicated more specifically to talking about position approval process.
In detail.
So to get to position data in the upgraded core system, you'll navigate as follows.
You'll start at the core.
C T H 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 will bring you to the POS. Management homepage.
The position management homepage consists of two tiles, the manage position tile is the critical tile used for both creating.
Updating position data.
So this essentially replaces the add, update position info page in today's system and the administer position style can be used to either view a summary of all changes on a single position, or see the history of incumbents of one given position.
So these pages are read only, so you cannot make changes through administer positions.
One of the major changes with the upgrade is the introduction of the position management activity guide.
This is a new, easy to follow process that's meant to help the user ensure all necessary information has been entered when you're creating a new position or adding a new row to an existing position, the activity guide is located on the left hand side of the page you.
Notice that the names of the tabs are very similar to the tabs in the current system. However, the tabs are now oriented vertically instead of across the top of the page. Each step will indicate if it's been visited, not started or completed, and in this example here only the 1st tab which is called position data has been visited.
And it's important to note that you can't move forward to the next tab of an activity guide until all the required steps on that tab are complete.
And those are marked with an asterisk.
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 are no longer accessed through the user's worklist. And as I mentioned earlier, the position approvals L200 training course. Will explore the approval process in greater detail.
Now we will discuss creating new positions.
To create a new position, you'll need to navigate to the manage position tile, and again that's core C, T, H RMS, workforce, administrator position management, manage position and highlighted as #1. Here is the add new link on the manage

position page.
So you'll click that link and you'll see that the effective date will pre populate with today's date.
That date has to be changed right here on this screen before you proceed to the activity guide.
As once you get to the activity guide, you can no longer change the effective date.
The effective sequence will default to zero and just like today, if after the establishment is approved, you have additional actions on that same effective date, the sequence would need to be changed to one, and so on.
For a new position, the reason code will show as new.
This cannot be changed for new positions, however, as we'll discuss in the position approvals course.
Approvers don't need to add a new row when they approve position transactions, so there will be no need for them to change this code to estimate like they need to today.
You'll note the position number field appears with all zeros, just as in today's position data. The system will automatically assign a position number after the request is submitted.
So this field cannot be overwritten.
And once you've confirmed the effective date is correct, you'll click the add button in blue #4.
To proceed to the activity guide.
The first step in the activity guide or guided process is the position data tab. The very first field on this tab is the refill indicator, which will default to manual.
Be sure to change this to six month or auto in order to hire or transfer an employee into this position after approval.
Please note also that the track recruitment check box is now available in the position information section. As you can see in the screenshot, instead of the additional Information tab where it is housed today.
Next, we'll proceed through the rest of the position.
Excuse me, position data tab, job code and department are required fields just as they are today and are 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 feature or you can manually type in the job code if you have it ready. Once you select A job code, many

of the other fields will populate including title, salary, plan information, union code, and standard hours.
And you must also select A department.
You can click the magnifying glass again to look up.
Use the look up or enter it manually.
You will need to be sure to adjust the location code if it is different than the default on the department and then indicated with number four in the screenshot is the description that replaces the detailed position description link that you're familiar with.
Here is where you can enter in the position justification.
While this no longer opens into a separate pop up like it does today.
The box can still be expanded by clicking and dragging the bottom right hand corner, so you will be able to fit your full justification as needed right here.
This slide highlights some of the fields currently on the specific information tab today and they're 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, that would be additional information, or you can click the next button that appears in the upper right.
The education and government section, which is currently in the specific Information tab in the current system, excuse me, will now be within the additional information tab.
So here is where you would enter in the FTE value and select the adds to FTE actual account if applicable.
The next tab of the Activity Guide is the budget incumbents tab.
There's no need to enter any information here as you're creating a new position, but once an employee is hired, this page will populate with their name, employee ID, and employee record.
It will also contain a direct link to the incumbents job data record, just as this tab does today.
The 4th tab of the Activity Guide is where you would enter the funding information for this position.
Excuse me.
Select the combination code by either using the lookup to search by certain chart fields or you can paste in the combo code in full if you have it available, you'll enter

in a percentage into the percent of distribution fields that's number two on the screen shot. Whether the.
Position is single or split funded. The percentage here needs to equal 100 to proceed.
If there is a funding funding end date, you would select it using the calendar icon or by manually entering it and that's number three in the screenshot.
And finally, if you need to add or remove another combination code, the plus and minus buttons are in the upper right and that's highlighted as #4 in the screenshot.
A brand new feature in Fujind data is the ability to add attachments whenever you create or update an existing position.
This is its own tab, and there's two options here.
You can either upload a document and to do that you would click the add attachment button.
Click on my device to select a file to upload and you'll be able to give it a unique description that anyone viewing the position will be able to see.
Alternatively, you can also add a note on this page.
And to do so, you would click the add note button and then enter in the description and note text and then click done.
The last step of the activity guide is the review and submit tab.
So this is new as well with the upgrade.
So this is your chance to look at the proposed changes. If you see that additional modifications are needed, you can navigate back to the appropriate tab to make changes before you submit, so you'll review the key information table.
Confirm that the position details are correct, and then you'll click the submit button which is highlighted as #2.
On the screen shot in the upper right hand corner.
After clicking submit, the position confirmation screen will indicate that the request has been submitted for approval. If the position transaction requires approval, this page will display the list of approvals that are needed by role. Very similar to today's position approval tab.
The example shown here doesn't require any approvals, so no approvers are listed.
After submitting the new position, you can navigate back to the position details page to view the approval status.
The example here is a new position that does require several steps of approval, so you'll see indicated as number one that the approval status is in approval process.

You can also click the approval chain link indicated with #2 to see the status of the approval, so it's important to note here that this replaces the position approval tab that's in the current system.
Where Approvers write their 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 with that approval role for your agency. In other words, the person who currently has that position pending the appro.
Chain is also where the approver comments will appear as well as a timestamp of when the approval was made.
So now we're going to pause to take some questions.
You could please enter them in the chat.

RM **Reutter, Shanon M** 15:02
I don't have anything in the chat right now.

CC **Catania, Cheryl** 15:07
Don't have anything with her.

JR **Jensen, Rosemarie** 15:08
OK.
Thank you.
Alright. We'll move on now.
We'll be moving on to discuss modifying positions.
To modify an existing position, you will also need to navigate to the same managed approved. Excuse me, same managed position tile.
Here you would search for an existing position by using any of the fields shown above.
These are the same search fields available today, but there are two key differences from today's search functionality.
The first is if you are searching for a specific position number, you will need to enter in all 8 digits, including the leading zeros.
If you're searching by department, you will also need to enter the business unit so that agency, university, judicial so on. Once you've entered in your criteria, click the search button and then from the search results you click the arrow on the right hand

side of the position you.
Need to update a nice new feature with the upgrade.
Is that the manage position search page will show?
The last five positions you most recently searched, so if you need to re access something that you recently updated.
It's gonna be listed right on the search page for you.
You will now be able to create a new position via cloning an existing approved position.
So this allows users to create a new position with most of the fields pre populated, which saves time.
The clone button replaces the initialize feature that you might be familiar with today.
So the navigation is the very same. For this to get to the manage position tile, you'll need to search for and identify an existing approved position to start the clone process.
Once you've identified that position, you'll click on the arrow to access the details, and then you'll click the clone button to begin the process, and that's in the upper right.
Once the position has been cloned, you'll follow the same steps as. Create a position and make your changes where applicable. Just like with creating a position, you'll need to visit each step of the activity guide, ensuring that all required fields are completed.
You'll need to select an effective date, and again you cannot change the effective date after the activity guide has started, so you'll want to be sure to double check it here.
The reason code will populate with new.
Click continue and then once on the activity guide you can make any needed changes.
To the original clone position.
Note that key fields will already be populated, including the job code and apartment, and then you'll click the next button to continue through the guided process steps.
You will need to select A combination code when cloning a position as it does not populate from the existing position.
So on this tab you'll follow the same steps as when creating a new position like we saw in the prior unit.
So that means you can either click on the magnifying glass and search by chart field,

or paste a complete combination code in the field. If you have it available.
Once you've completed all the steps in cloning a position, you'll review and submit the request and then after clicking submit, you'll see that a position number has been generated and you'll receive a confirmations message across the top of your screen stating that your request has been submitted for.
Aroval, the approval chain listing all of the required approvers, if applicable, appears on this confirmation screen.
Next, we'll look at an example of modifying an existing position by changing the job code on a new row.
Again, it's the same navigation core C T H RMS, workforce, administrator position management, manage position. You'll need to enter your search criteria or position number.
Click search to pull up the results, and then click the arrow button to access the position details page and then you'll click the add row button on the right of the page that's highlighted as #4 in the screenshot here.
You will then need to select your effective date and look up and select the reason code by using the magnifying glass or you can enter it manually here.
So I've mentioned this before, but I just want to emphasize both the effective date and the reason code cannot be changed once you've started the activity guide.
So essentially, once you have clicked continue after entering both of those fields.
So you'll want to be careful to double check that information.
Click the continue button and in the Job information section of the position data tab.
Look up and select the job code by using the magnifying glass or by entering it manually and then if required for your agency, enter in a justification for the reclassification into the description box and then complete review and submit the transaction, which will be routed to the app.
Approver for review.
You can also search for existing position transactions and see all of the historical transactions on a given position, just like you can today.
To do so, you will also navigate to the manage position tile, enter the existing position number by entering in all 8 digits, including the leading zeroes.
Mark the include history check box.
Click search to pull up the results, and then click the arrow button to access the position details page.
Note that the activity guide that we've discussed in earlier units does not apply when

you're reviewing an existing transaction.
That's only for new transactions, so instead all of the position information will appear on a single page with options to expand or collapse each header.
So you can review the information of that transaction by scrolling down the page.
To view specific sections like education and government.
Specific information and more.
Note that the funding details are at the very bottom of the page when you are viewing an existing row, and then you'll click the previous or next button to navigate between all transactions of that position.
Alright. Well, that's our review of the position management changes I'm seeing. A few questions come in now.
You should be able to access position management, fluid pages and dashboards, manage positions for both new and existing positions.
Cloned positions and then review transaction status.
Alright, so please go ahead and push your questions in the chat or direct them to Cheryl if you can't use the meeting chat.

RM **Reutter, Shanon M** 22:07
OK.
We have one here.
Will we still have two separate sign insurance for core?

JR **Jensen, Rosemarie** 22:12
Yes, if your agency uses apcnid to bypass internal agency approvers that you've already gotten in ukg, that will function the exact same way in the upgraded system.

RM **Reutter, Shanon M** 22:26
And the next one in the current version of core in add update position info there is the last tab of position approval that includes a comment field.
Will this field no longer be a feature in the upgrade?

JR **Jensen, Rosemarie** 22:39
Correct. So that position approval tab is no longer available.
In the upgraded system that is replaced by the approval chain and to get more in depth on that, I would recommend signing up for the position approval course, but

essentially that the approval chain is the new place that lists out all the approvers that are required it'll list.
A timestamp of when each one approved and it is also where their comments are going to be housed.

RM **Reutter, Shanon M** 23:13
There's another one, it says.
Good morning.
I understand that the CTW position table in EPM will be revised.
Will the approval chain comment box be available to include in a query? Currently the position offset to be inactivated as stated in the position approval box which isn't available to query.

JR **Jensen, Rosemarie** 23:34
OK, I'm gonna have to get back to you on that question.
I'm not an EPM expert, but we are gonna be posting AQ and a after this course is over and once it's posted online.
So any questions that we don't have an immediate answer to, we can include the answer on there.

RM **Reutter, Shanon M** 23:53
That's all I have for now.

JR **Jensen, Rosemarie** 23:54
OK, can give it another moment or so.
If you do have questions after we wrap up the training at any point, you can send in a footprint ticket with your question.
So that would be your usual login for footprints. If you don't have access to footprints, you can send an e-mail to readiness@ct.gov and we can include those questions on the Q&A.
That'll be posted online.

RM **Reutter, Shanon M** 24:23
I have another one here, Rose. If the effective date and reason code can't be

changed, do we cancel the transaction or have to submit a ticket?
I'm unable to send via chat.

JR **Jensen, Rosemarie** 24:34
OK.
Yes. So if you it depends on where you are in the process.
If you haven't hit submit yet, then you would need to back out and get back to the point where you add a row and then update the effective date and recent code right there. If you realize after the fact after you've submitted that transaction that you had the.
Wrong effective date or reason code then yes, you would need to enter in a footprints ticket and we could correct it for you.
OK. That completes the position management course.
Please take a moment to complete the training evaluation which we will link in the chat and the course material will be posted in the chat as well as on the core CT Modernization homepage where you will also find links to the L100 courses, infographics and other.
Helpful material.
Thank you everybody for participating today.

Reutter, Shanon M stopped transcription