L200PM003 - Position Management-20241106_192648-Meeting Recording

November 6, 2024, 7:02PM

24m 42s

Reutter, Shanon M started transcription

JR **Jensen, Rosemarie** 0:04

My name is Rose Jensen.

I'm the principal HR specialist for the core Cthr 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.

We ask that you remain engaged by asking questions and I will be pausing a couple of times throughout to address any questions that pop up.

I did want to mention a couple of other items.

We do have accessibility capability through the webinar, though it has to be turned on by individual users and then our core CT training page is now available online and we will be sharing the link for that at the end of the course.

This webinar might function a little bit differently than other teams meetings you've been in, so here's a brief overview of our roles for today. As your trainer, I'll be covering the course content and speaking to the functionality and also answering any questions.

We also have a separate facilitator who is sharing the presentation and she will be directing questions to me at the end of each session. And as the participants, we ask that you put your questions in the chat throughout the training.

As you won't able to turn on your microphone or camera.

We are aware that some participants are not able to use the chat in the meeting itself. If that's the case for you, you can direct your question directly via teams to share all Catania who will put her name in the meeting chat and then she'll share it with.

All of us.

And then we also will be taking questions after the fact via footprints or

readiness@ct.gov.
So here's a quick glimpse at today's schedule.
The presentation should be under half an hour, but we have built in some extra time for questions.
So some of the changes due to the pump upgrade include a new user interface. That means new navigation for position data changes to the steps for managing and creating new positions, a new activity guide process, and the clone position feature. Which replaces the initialized functionality that's available today.
So here we have a list of terms that you might not be familiar with.
These are terms that apply broadly to the upgrade, so they're used in this training as well as other trainings that we're offering.
Fluid User interface adapts.
More readily to different types of devices, so it's meant to be more mobile friendly, but it will of course also work on your desktop.
Homepages are a collection of tiles that users can Click to access transactions.
These are personalized entry point for different types of activities.
A guided process which we also refer to as an activity guide, is a new feature that's a series of actions or steps that users will complete for 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 needing to search through menus like you do today.
So now let's take a closer look at the user interface changes.
So we'll look at navigation, how to get around and the different navigation paths in the new system.
Specifically the manage position and administer position tiles, what they look like and what they're used for. The new position management activity guide, and then we'll do a brief touch on position approvals. As you might know, there is a separate L200 training course that's dedicated specifically to.
Discussing the approval process, we're holding one more training of that next week and you could also watch the recordings online from prior trainings.
So to get to position data in the upgraded course system, you will 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 when 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 position management homepage and you will note that the position management homepage consists of two tiles, the manage position tile is the critical tile used for both creating and updating position data.
This essentially replaces the ad update position Info page in today's system and then the administer positions tile is used to either view a summary of all changes on a single position, or to see the history of incumbents.
On a given position, so these pages are read only and you can't make changes on those pages.
So 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 updating existing position inform.
The Activity Guide is located on the left hand side of the page.
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.
Instead of across the top of the page as you proceed through, you'll notice that each step will show whether it's been visited, not started, or completed, and in this example, on the screen, only the 1st tab, called position data, has been visited. When you haven't visited the other.
Tabs, they're grayed out, and it's also important to note that you cannot move forward to the next tab of the activity guide until.
All required steps on the tab you're on are complete.
Those are always 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 a separate approvals tile, which is located on both the Workforce administrator homepage and the manager self-service homepage.
So 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 this in greater detail.
Next, we will discuss creating positions.

So to create a new position you will need to navigate to the manage position tile again.
That essentially replaces the add, update position Info page that you use today and that navigation path is core C T H RMS homepage, workforce, administrator, position management, manage position and highlighted as #1.
Here is the add new link on the manage position page.
You would click that link and you'll see that the effective date will pre populate with today's date.
This will need to be changed on this screen before you proceed as once you start 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 there are additional actions with the.
Same effective date.
The sequence would need to be changed to one and so on.
The recent code will show as new.
This cannot be changed for new positions. However, as we discussed in the position approvals course, approvers do not need to add a new row when approving position transactions.
So there is no need for them to change the reason code to est like they do today.
And you'll also note that the position number field appears with all zeros at the top.
So just as in today's position data, the system automatically assigns a position number.
After the request is submitted so that field cannot be overwritten once you've confirmed the effective date is correct, click the add button in blue to proceed to the activity guide.
The very first step in the activity guide or guided process is the position data tab and the first field on this tab is the refill indicator, which defaults 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 here in the screenshot, bracketed in blue.
Instead of in the additional information tab.
Its house today.
Next, we'll proceed through the rest of the position Data tab, job code and department are required fields just as they are today, and they 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 type it in manually once you select A job code.
Many of the other fields will populate based on that job code's default values.
So that would be the title, salary, plan information, union codes, standard hours.
And you must also select A department.
Click the magnifying glass to use the lookup function or you can enter the full department manually, but you will need to be sure to adjust the location code if it's different than the default associated with that department and then indicated with the number four above is the descri.
Which replaces the detailed position description link you are familiar with today.
Here's where you can enter in the position justification. While this no longer opens into a separate pop up, the box can be expanded by clicking and dragging the bottom right hand corner of the box, so you'll be able to fit the full justification.
As needed there.
This slide highlights that some of the fields currently on the specific information tab today are now consolidated onto that first position Data tab and then 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 in the upper right hand corner.
The education and government section currently in the specific Information tab 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.
And the next tab of the Activity Guide is the budget incumbents tab.
There is no need to enter information here as you're creating a new position, but once employees hired this page will populate with their name, employee ID and employee record.
It also will contain a direct link to the incumbents job data record, very similar to how this page works today.
The 4th tab is where you would enter the funding information for this position.
You can select the combination code by either using the look up to search by certain chart fields or paste in the combo code in full if you have it available, enter a percentage into the percent of distribution field. Whether the position is single or

split funded the percent.
Here has to equal 100 in order to proceed.
If there is a funding end date, you can select it using the calendar icon.
Annually entering that date and if you need to add or remove another combination code, the plus and minus buttons are in the upper right indicated by the number four in the screenshot.
A brand new feature in position data with the upgrade is the ability to add attachments whenever you create or update an existing position, and this is its own tab in the activity guide to add an attachment, you will click the add attachment button.
Click on my device to select the file you'd like to upload, and then you'll be able to give it a unique description that all viewers to the position will be able to see.
Alternatively, from the same tab, you can add a note on this page.
To do so, you would click the add note button, enter in the description and note text, and then click done.
And the last step of the activity guide, which is also a new feature.
Excuse me, is the review and submit tab.
So this is your chance to look at the proposed changes for new positions. You'll just see one column of the proposed values.
This is different than when you were adding a change to an existing position, which case there's going to be another column that has the current values.
So it's a really nice way to see what exactly has changed from the prior row.
And here if you see that additional modifications are needed, you can navigate back to the appropriate tab to make your changes before you submit.
So once you've reviewed that key information table seen here, you would click that submit button highlighted as #2 to submit your transaction.
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 at the list of approvals that are needed by roll. The examples shown here doesn't require approvals, so no approvers are listed.
Then after submitting the new position, you can navigate back to the position details page to view the approval status.
This example is a new position that requires several steps of approval.
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 exact status of

the approval.
That is.
With whom it's currently pending, and who else needs to approve the position.
It's important to note that this replaces the position approval tab that you know in the current system where approvers write comments as they approve, deny or recycle the position, the new approval chain will include 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, the approval chain is also where the approver comments will appear as well as a timestamp of when the approval was.
So at this time, we will pause to take some questions and go ahead and enter them in the chat.

Reutter, Shanon M 15:38
So far we have no questions.

JR **Jensen, Rosemarie** 15:40
OK.
All right. We'll move on to discuss modifying existing positions.
So to modify an existing position, you will again navigate to the manage position tile.
You'll search for an existing position by using any of the fields shown above.
There are two key differences from today's search functionality. If you are searching for a specific position number, you will need to enter all 8 digits of the position, including leading zeros.
And then if you are searching by department or job code, you will also need to enter in the business unit.
So that would be agency, university, judicial and so on. Once you've entered in your criteria, click the search button and then from the search results you'll click the arrow on the right hand side of the position that you need to update. A nice new feature with the up.
Is that the managed position search page will automatically have the most recent five positions you worked on listed below, so you don't need to re enter the criteria to access a position. You very recently worked on.
You will now be able to create a new position via cloning and existing approved position.

So this allows users to create a new position that has most of the fields pre populated.
The clone button replaces the initialize feature that you might be familiar with in the current system.
That's the same navigation path to get to the managed position tile, you will need to search for and identify an existing approved position to start the clone process.
Once you've identified that position, you can click the arrow to access the details of the selected position and then you would click the clone button to begin the process.
That's the position has been cloned.
You'll follow the same steps as create a position, but make any changes where you need on the fields that have defaulted in, 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 will.
Have the chance to select an effective date and note that you cannot change the effective date after the activity guide has started.
The reason?
Code will populate with new.
Click the continue button and then once on the activity guide.
You can make any needed changes to the original clone positions values.
Note that key fields will already be populated, including the job code and all those related default values, and the department. And then once you have that information confirmed, you'll click the next button to continue through the guided process steps.
Note that you will need to select A combination code when cloning a position as it won't populate from the existing position, which is actually how the initialized feature works today.
So in this tab, you'll follow the same steps as when creating a new position to determine the funding like we saw in the prior unit.
So you can either click the magnifying glass to look up a combination code by chart fields, or you can paste in a complete combo code if you have it available.
Once you've completed all the steps, including a position, you will review and submit your request, and then after clicking submit, you'll see that the position number has been generated and you will receive a confirmation message stating that your request has been submitted for approval. The approval chain list.
All of their required approvers, if applicable, will appear on this confirmation screen.
Alright. Next, let's take a look at an example of modifying an existing position by

changing the job code on a new row, also known as reclassifying.
It's the same navigation path to get to the managed position tile, you'll need to enter in your search criteria or position number if you know it, click search to pull up the results.
Click that arrow button to access the position details page.
And then click the add row button on the right of the page that's highlighted as #4 in the screenshot here.
Excuse me? You will then need to select an effective date and then look up and select the reason code by using the magnifying glass or entering the code manually.
And again I wanna know both the effective date and reason code cannot be changed once the activity guide has started.
So what that means is if you have gone into the activity guide and you realize that you had entered the wrong effective date or reason code, you would need to exit and restart.
Alternatively, if you realise after submitting that your effective date or reasoning code is wrong.
You would need to submit a footprints ticket to have that corrected and we'll be able to fix that for you.
After the position is approved, if it requires approvals.
So after you've confirmed the effective date and reason code, click the continue button to start the activity guide and then in this example of a reclassification in the job information section of the position data tab.
You will look up and select the job code.
By using the magnifying glass or by entering it manually and if required for your agency, enter a justification for the reclassification into the description box and you will complete review and submit the transaction, which will then be routed to the appropriate approver for review if applicable for your.
Agency.
You can also search for existing position transactions and see all of the historical transactions on a given position.
To do so, you will navigate again to core C, T H RMS, workforce, administrator, position management, manage position, entering that existing position number, including leading zeros.
Mark the include history checkbox and then click search to pull up the results and then click the arrow button to access the position details page.

So note on the activity guide.
Excuse me.
Note that the activity guide we've discussed in earlier parts of the training does not apply when you're reviewing an existing transaction.
Instead, all of the position information will appear on one single page, with options to expand or collapse each heading.
So you'll review the information of that transaction you want to be sure that you Scroll down all the way to the bottom of the page.
Because the funding details are actually the very last field.
When you're viewing an existing row and then you can click the previous or next button to navigate between all of the transactions on that position.
Right. That completes our review of the position management pages.
You should be able to now access position management, fluid pages and dashboards, manage positions for both new and existing positions, clone positions and review transaction status.
And if there's any questions, we'll pause for them now.

Reutter, Shanon M 23:16
We have one comment.
Somebody stated that they were hoping the funding would clog with the upgrade.

JR **Jensen, Rosemarie** 23:18
OK.
Yeah, that, that that was a specific choice that we made to keep that from the current system.

Reutter, Shanon M 23:37
There's no questions.

JR **Jensen, Rosemarie** 23:39
OK.
Alright, well, if anything comes up after the training that you think of, please feel free to submit a footprints ticket.
With any questions that you might have if you have access to footprints, you would log it the same way. If you do not have an ct.gov e-mail address, you can send it to

readiness@ct.gov.
And that completes the position management course.
Thanks for joining us today.
Please take a moment to complete the training evaluation, which will be LinkedIn the chat and then the course material will be posted in the chat as well as on the course ET Modernization homepage and that has a wealth of other information about the upgrade including L1.
Courses, infographics, and job eights.
Thanks again for your your participation today.

◉ **Reutter, Shanon M** stopped transcription