Career Progression Framework Library Step Guide

Introduction

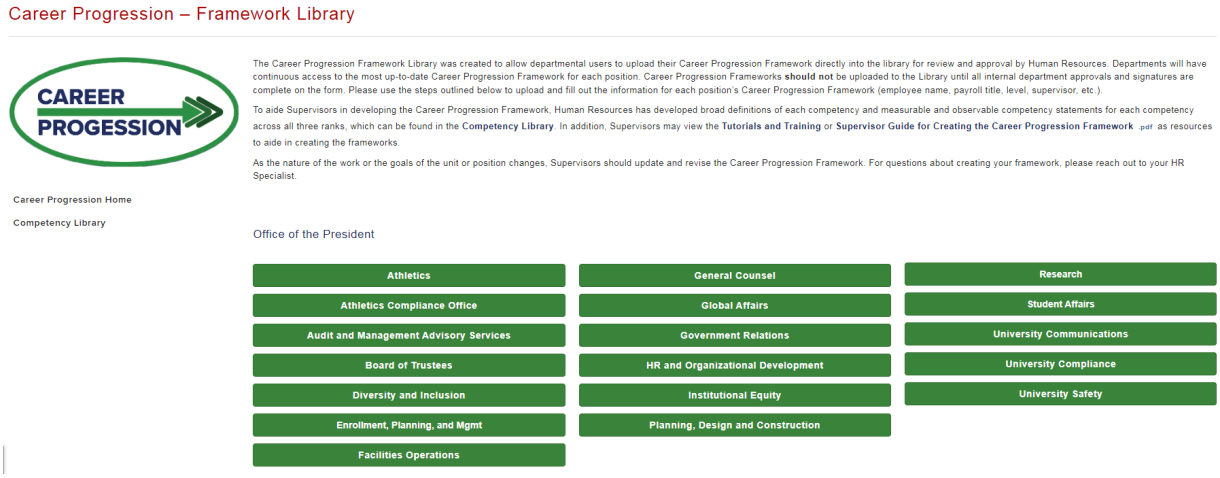
The Career Progression Framework Library was created to allow departmental users to upload their Career Progression Framework directly into the SharePoint library for review and approval by Human Resources. Departments will have continuous access to the most up-to-date Career Progression Framework for each position.

Career Progression Frameworks **should not** be uploaded to the Library until all internal department approvals and signatures are complete on the form. Please use the steps outlined below to upload and fill out the information for each position's Career Progression Framework (employee name, payroll title, level, supervisor, etc.) in addition to uploading the Framework.

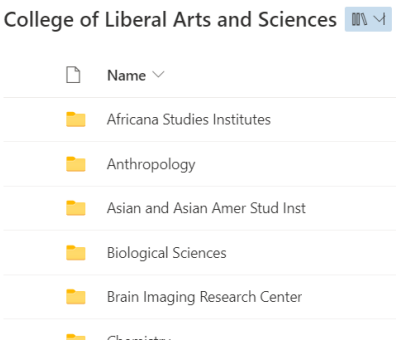
There are two parts to uploading a Career Progression Framework, uploading a document and editing in grid view, that are outlined below. ***Please ensure to follow all steps in both parts to upload correctly as all field are required for a Framework to be approved by Human Resources.***

How to Upload Documents in SharePoint

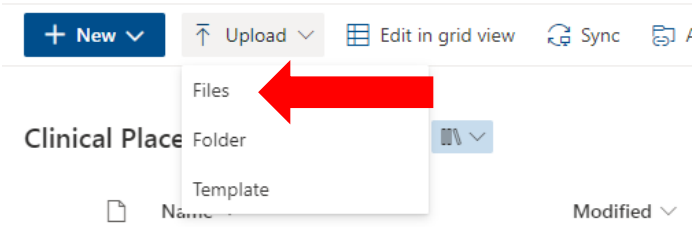
Step 1. On the Career Progression Framework Library website click the link for your specific department that will direct you the SharePoint site for your Framework Library.



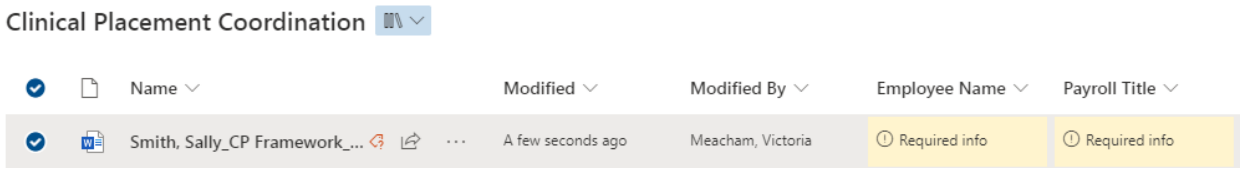
For larger departments with multiple units, select the specific unit you want to upload the Framework to in order to navigate to that specific folder.



Step 2. Click **Upload** in the header and select files.



Navigate to the folder where you have saved the Framework on your computer and select Open. You will then see the page refresh and your document has been placed in the Library.

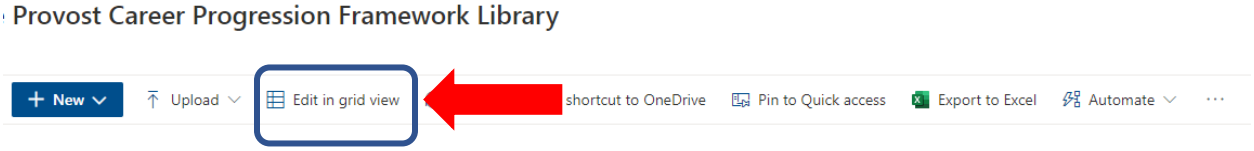


Another option to upload will be by dragging documents from your desktop or file folder directly into the library. Select the document you want to upload, hold down your left mouse button, and drag the file into the Library until a dashed blue line around the perimeter and + Move appears. Let go of the mouse button to drop the file.

How to Edit in Grid View

This option will be available for users in the Library who have access to view their entire department.

Step 1. Click **Edit in Grid View** in the header to edit one or more records.



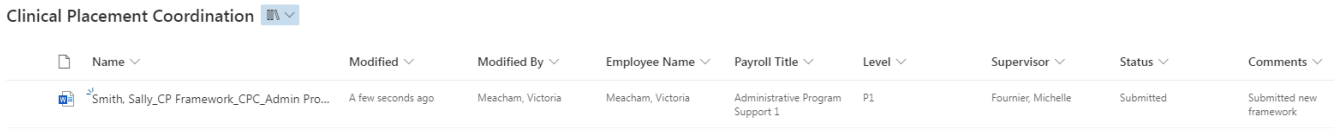
Step 2. Enter the column information for each record (Employee Name, Payroll Title, Level, Supervisor, Status, and Comments). All fields other than Comments are required.

> **Note:** If you are opening and editing a Framework document directly from SharePoint, you **must** close the document before entering information in Grid View. If the document is opened from SharePoint, it becomes locked for editing and any data entered in Grid View **will not save** unless the document is closed first.

Explanation of Each Field:

- **Employee Name:** This is a name look-up field. Enter the employee's last name, first name and select the desired result. Leave blank if no employee is currently in this position.
- **Payroll Title:** Enter the full job template title for the position, i.e., Administrative Program Support 3.
- **Level:** This is a drop-down menu. Click in the field and select the Career Paths Salary Band Level associated with the job template (P1-P7 or M5-M8).
- **Supervisor:** This is a name look-up field. Enter the supervisor's last name, first name and select desired result.
- **Status:** This is a drop-down menu. Click in the field and select Submitted. HR will be responsible for updating the status field as the Framework is reviewed.
    - **Submitted:** Selected by department when uploading new or revised Framework.
    - **Approved:** Selected by HR when Framework has been reviewed and approved.
    - **HR Reviewed:** Selected by HR when HR begins the review of the Framework.
    - **Sent Back:** Selected by HR when HR has sent Framework back to department for corrections.
- **Comments:** This is a free form field to enter any comments needed by department or HR (i.e., what has been revised on framework, what is missing).

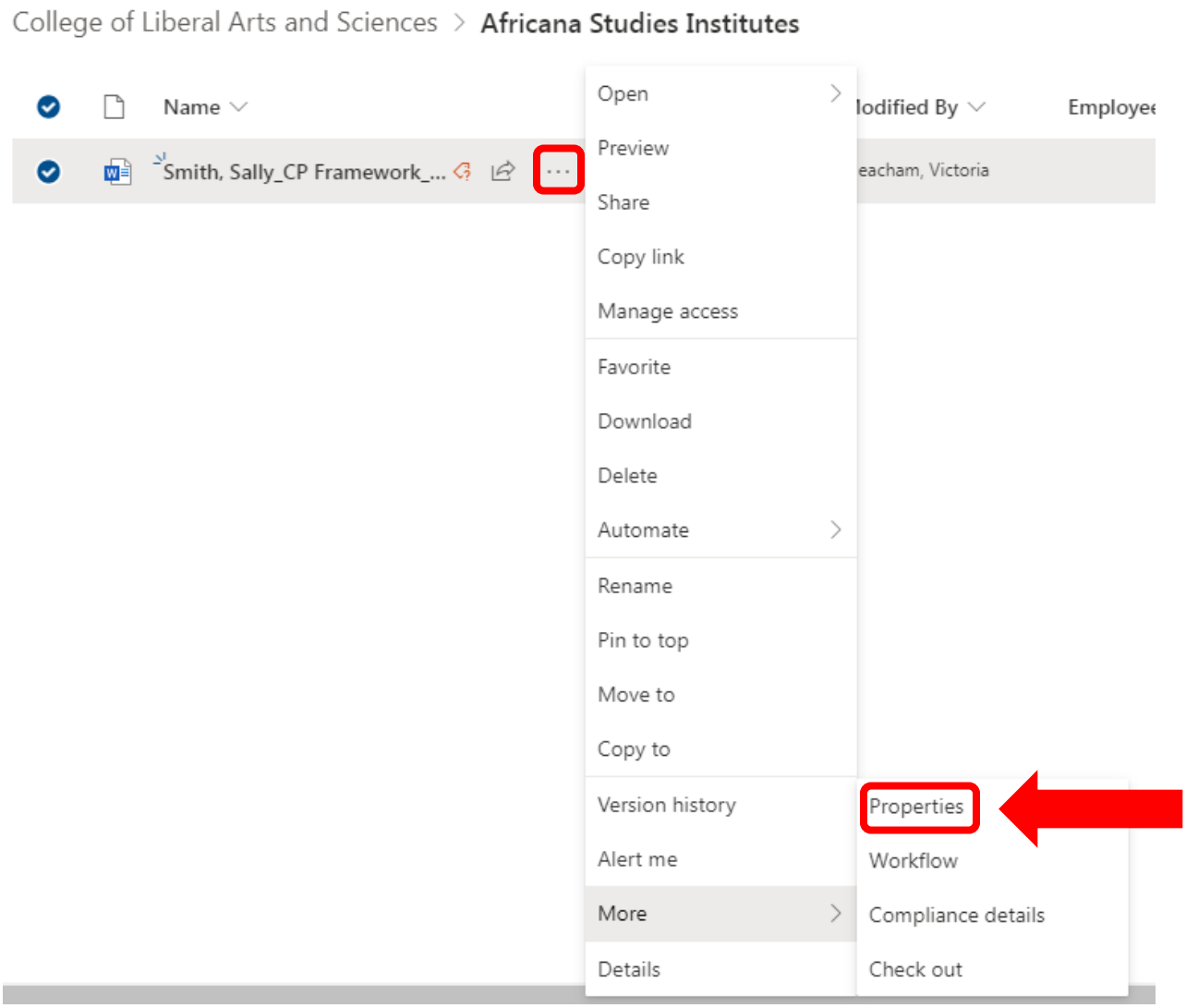
Step 3: Click **Exit grid view** to save changes.



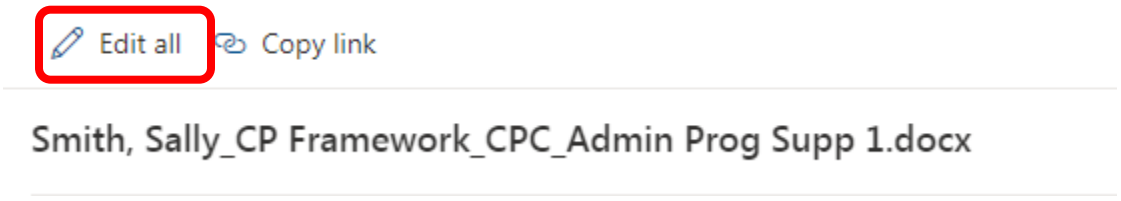
How to Edit in List View

This option will be available for those users who have access to a sub-department only.

Step 1. Click the three vertical buttons to the right of the document name that you recently uploaded. Click More and Properties to open the details pane of the record.



Step 2: Click Edit all at the top of the tab to enable editing of the values. Enter the information for the respective Framework.



Step 3. Click **Save** in the header to save changes.

Questions

If you have technical questions about using the Library and/or access related questions, please reach out to the Workforce Solutions team at workforce@uconn.edu.

For more information and helpful tips regarding SharePoint, visit https://support.microsoft.com/en-us/sharepoint.