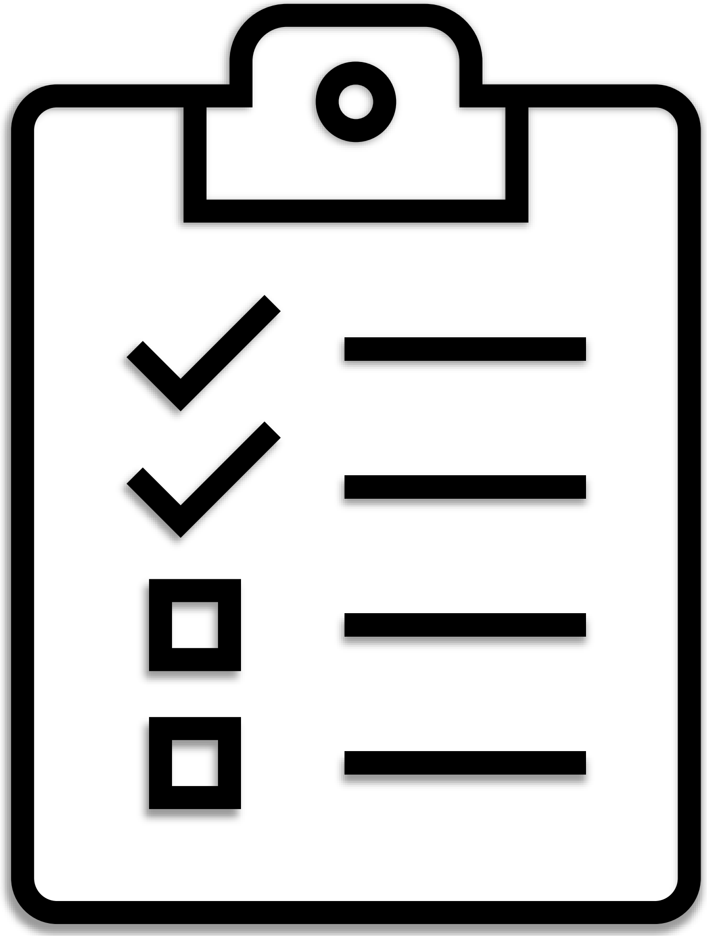
Core-CT

Core-CT Modernization
User Group Change Agent Kickoff

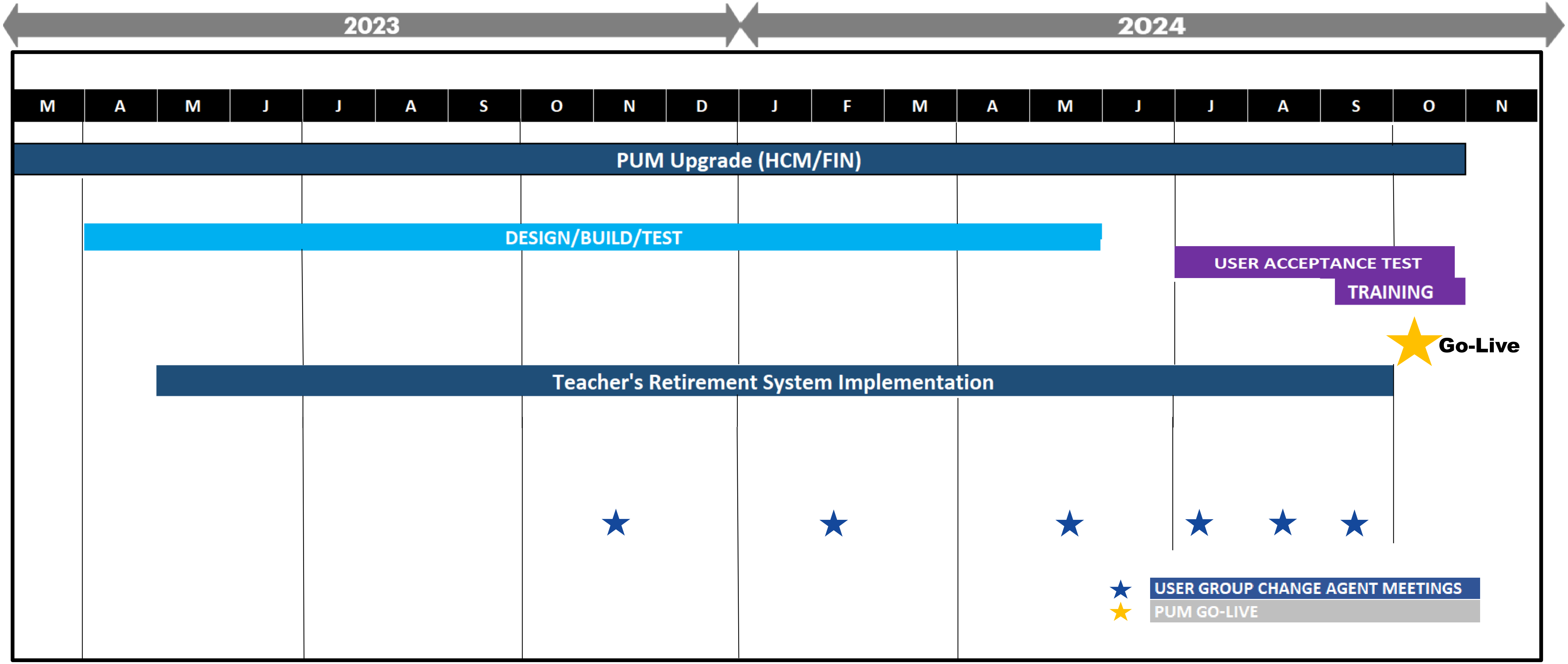
May 2, 2024

Agenda

- Welcome
- Timeline
- Fluid Functional Impacts
- Agency Data Clean Up Awareness
- Training Curriculum
- MFA Update



Core-CT Modernization Timeline



Core-CT Modernization Project Goals

- Upgrade HCM, CRM, and FIN applications.
- Enhance Core-CT's user interface on mobile device capabilities.
- Implement new features in Core-CT.

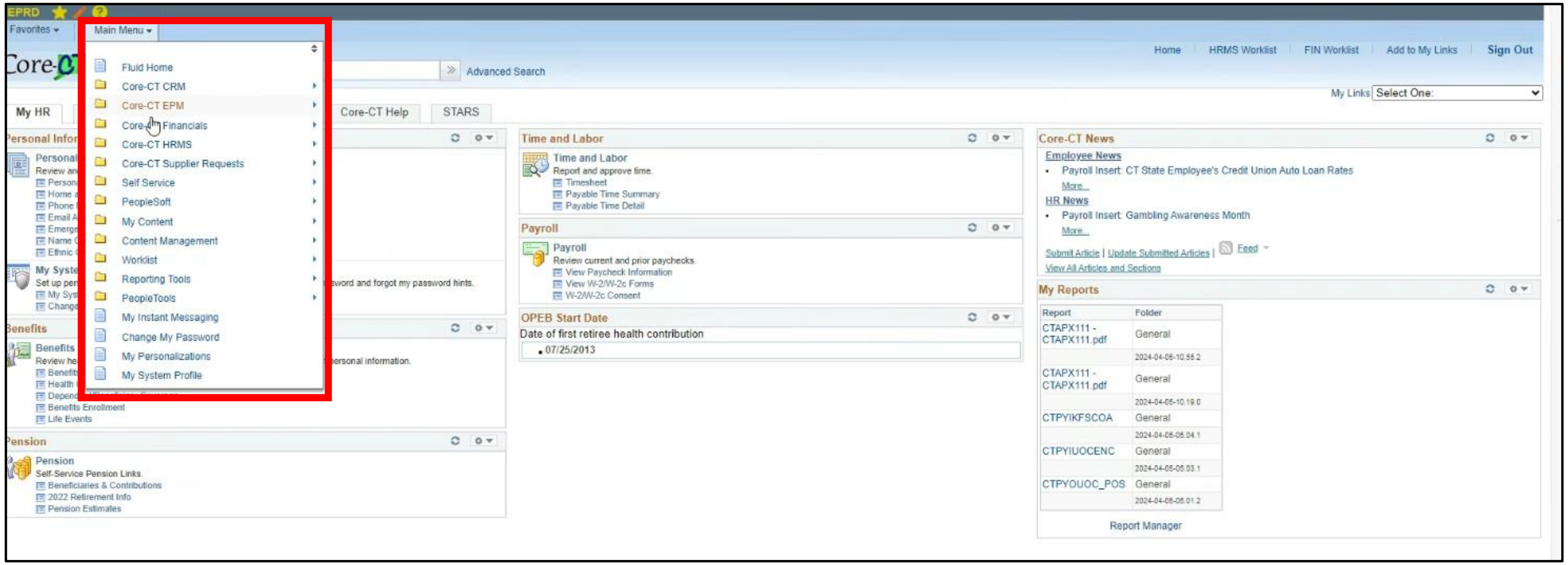
Core-CT

Navigation Impacts

The following options can be accessed from the fluid drop down menu:

- ***Employee Self Service***
- ***Core-CT Financials***
- ***Core-CT HRMS***
- ***Core-CT Help***
- ***My Reports***

Current:



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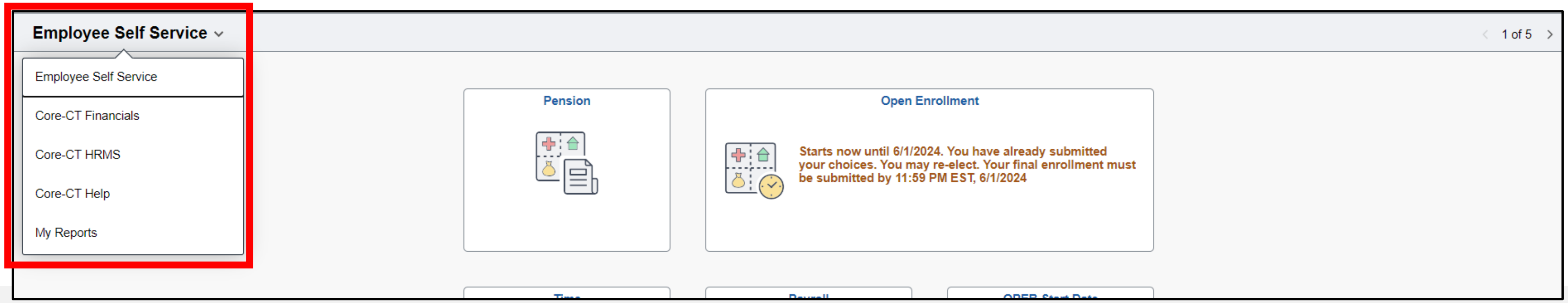
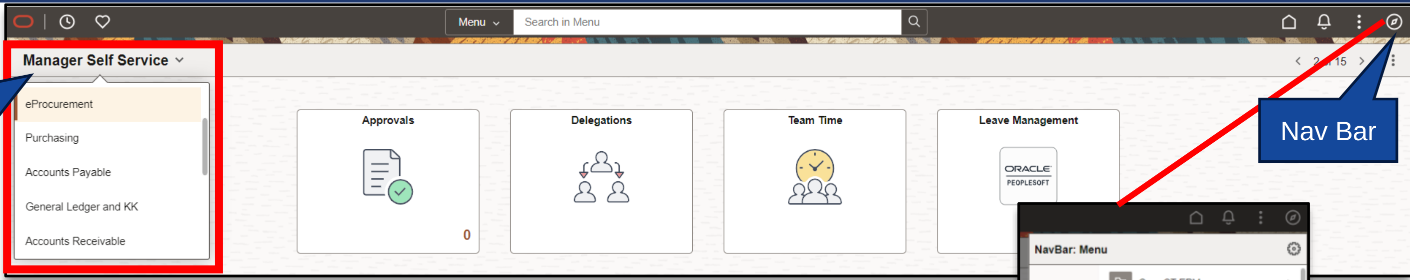


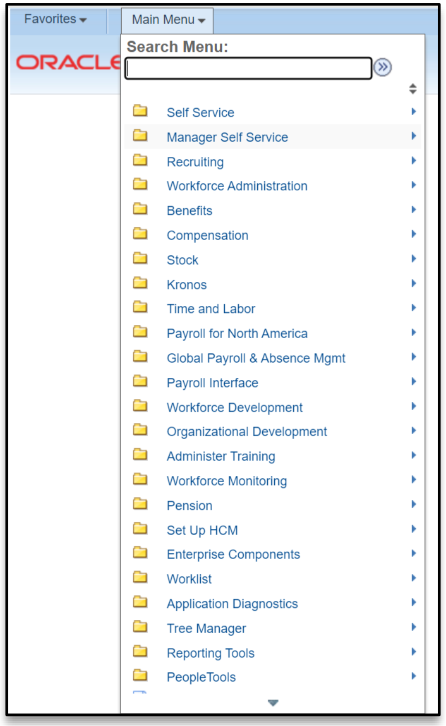
Navigation Impacts

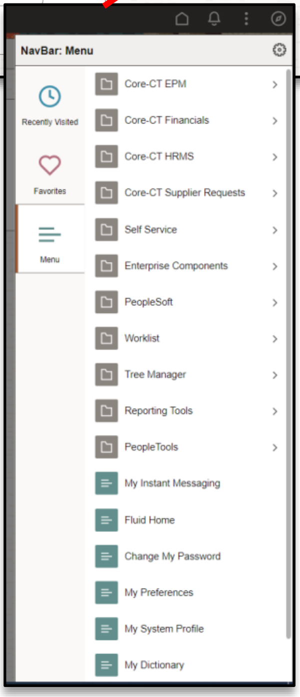
Navigations have been revamped to include high use fluid tiles on module dashboards and an upgraded menu accessed via the Nav Bar

After ***Core-CT Financials*** or ***Core-CT HRMS*** is selected, use the module tiles to select different fluid pages



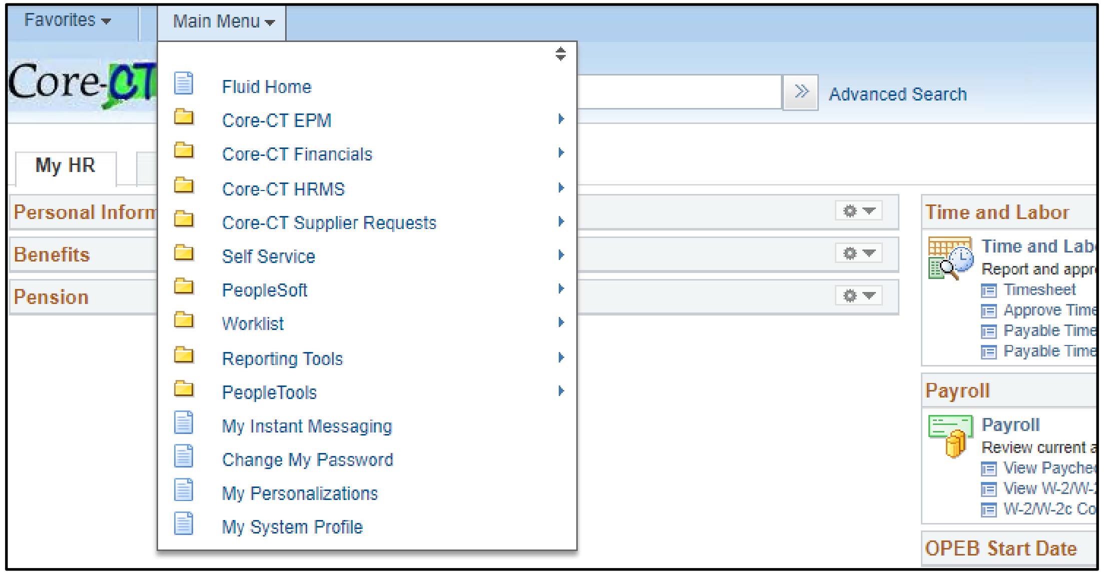
Nav Bar





Navigation Impacts

Current:



- Utilize the **Main Menu** to access pages

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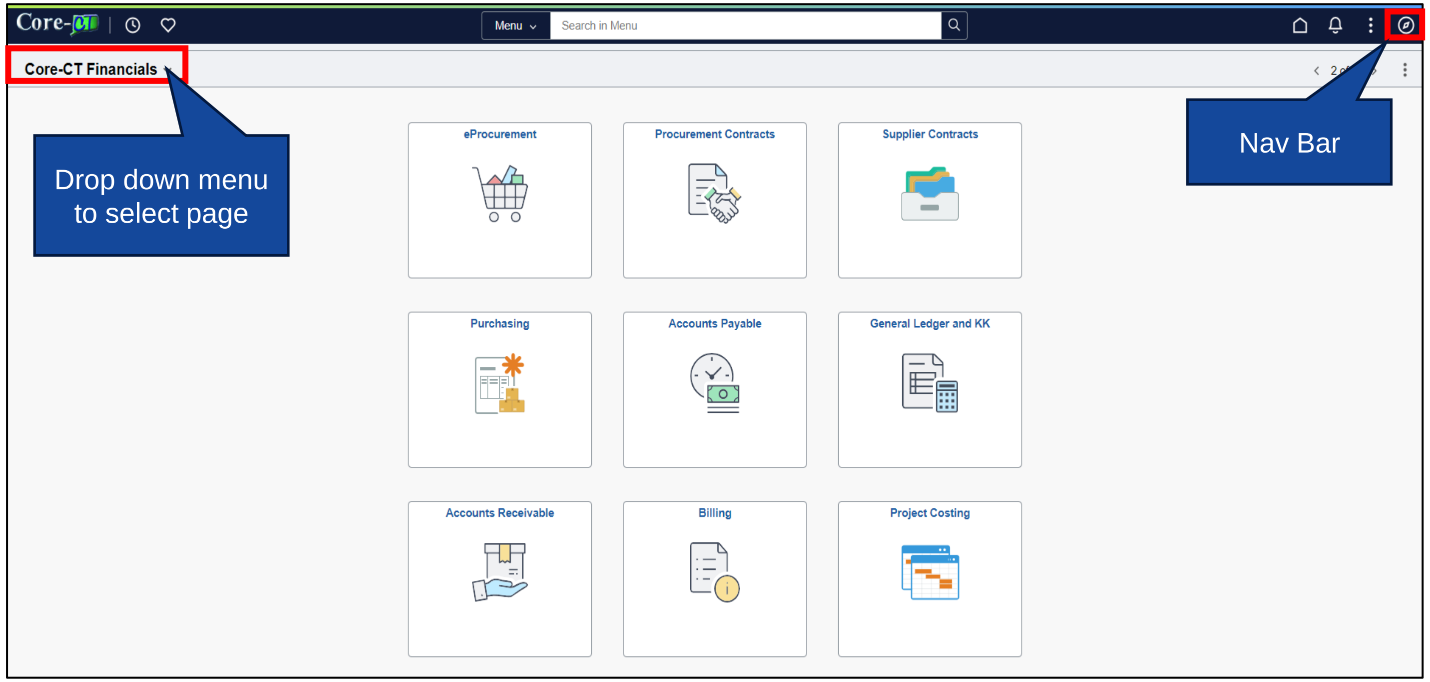
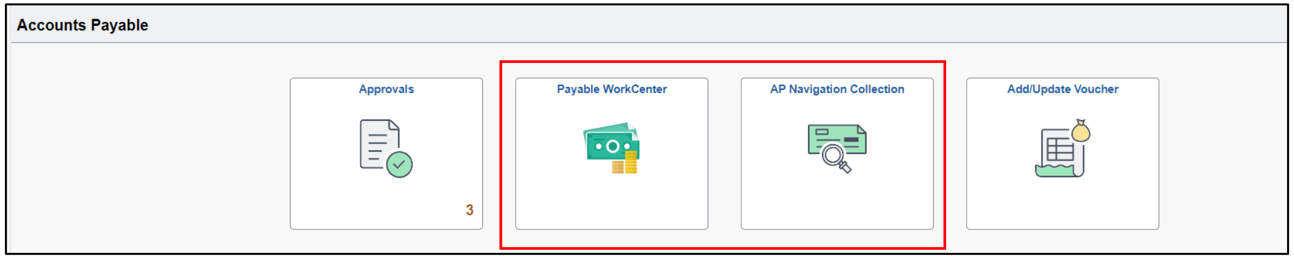


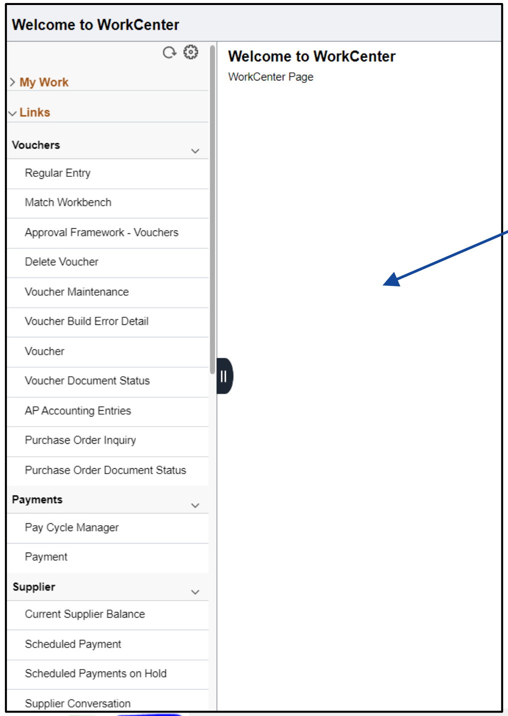
- Drop down menu to select **HRMS/FIN** page
- Use fluid tiles to navigate to high use pages
- All other pages can be accessed using the NavBar, refer to job aids for clarity

Navigation Impacts

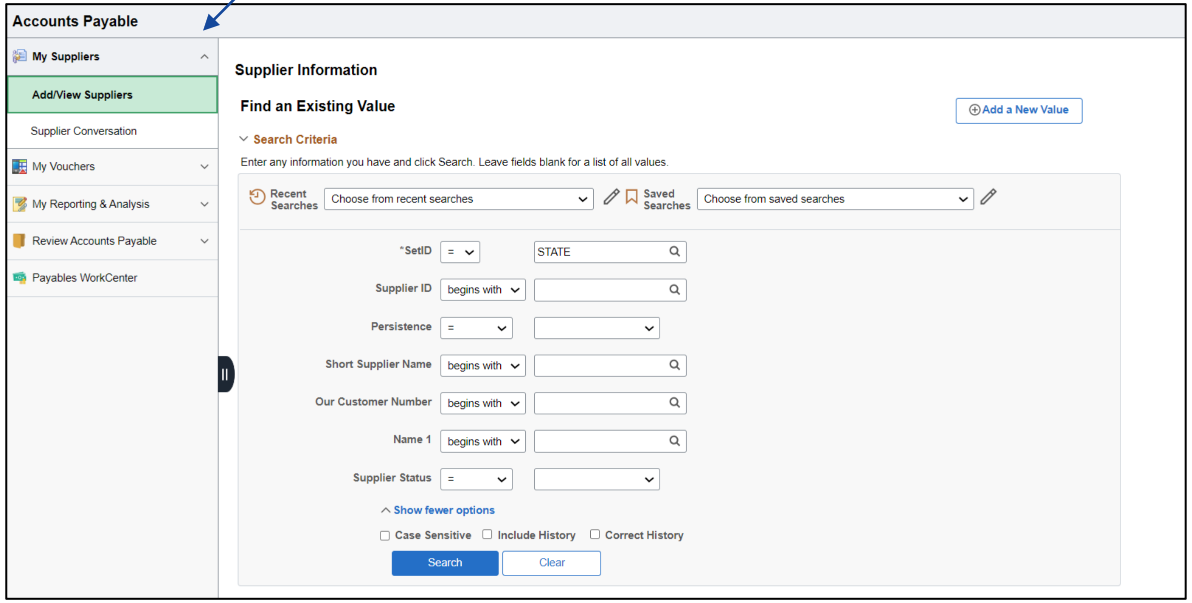
Accessing Navigations or Workcenters from Fluid Tiles:



__Navigation collections__ provide a flexible tool for building alternative groupings of the contents stored in your portal registry. These alternative groupings of links to portal content can then be deployed to different users or groups of users, creating navigation that specifically addresses your users' business needs.

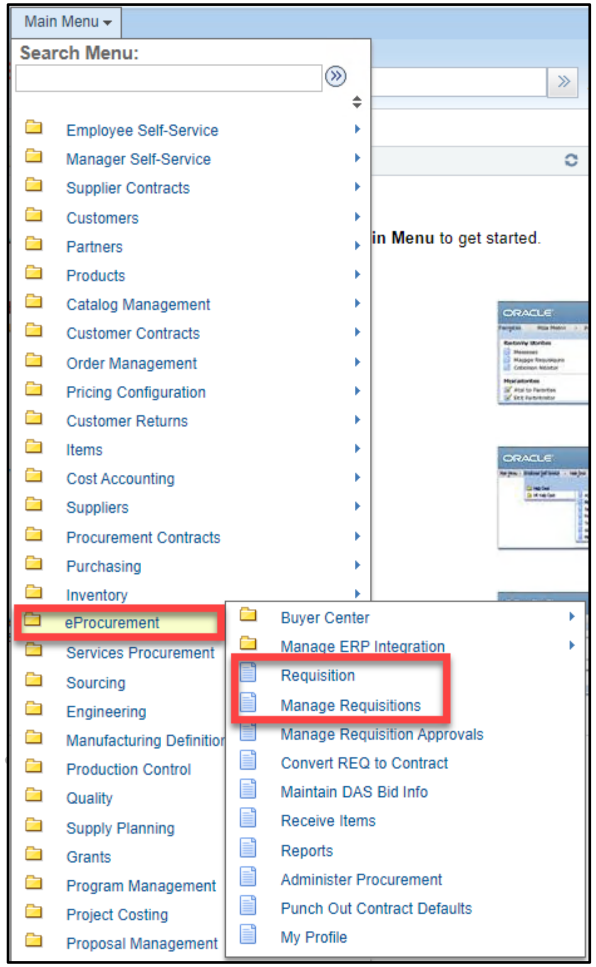


__WorkCenter__ acts as a centralized directory of pages that allows users to quickly navigate between high action sections based on their asset security role.



Requisition Impacts

Current:



- Main Menu > eProcurement > Requisitions or Managed Requisitions

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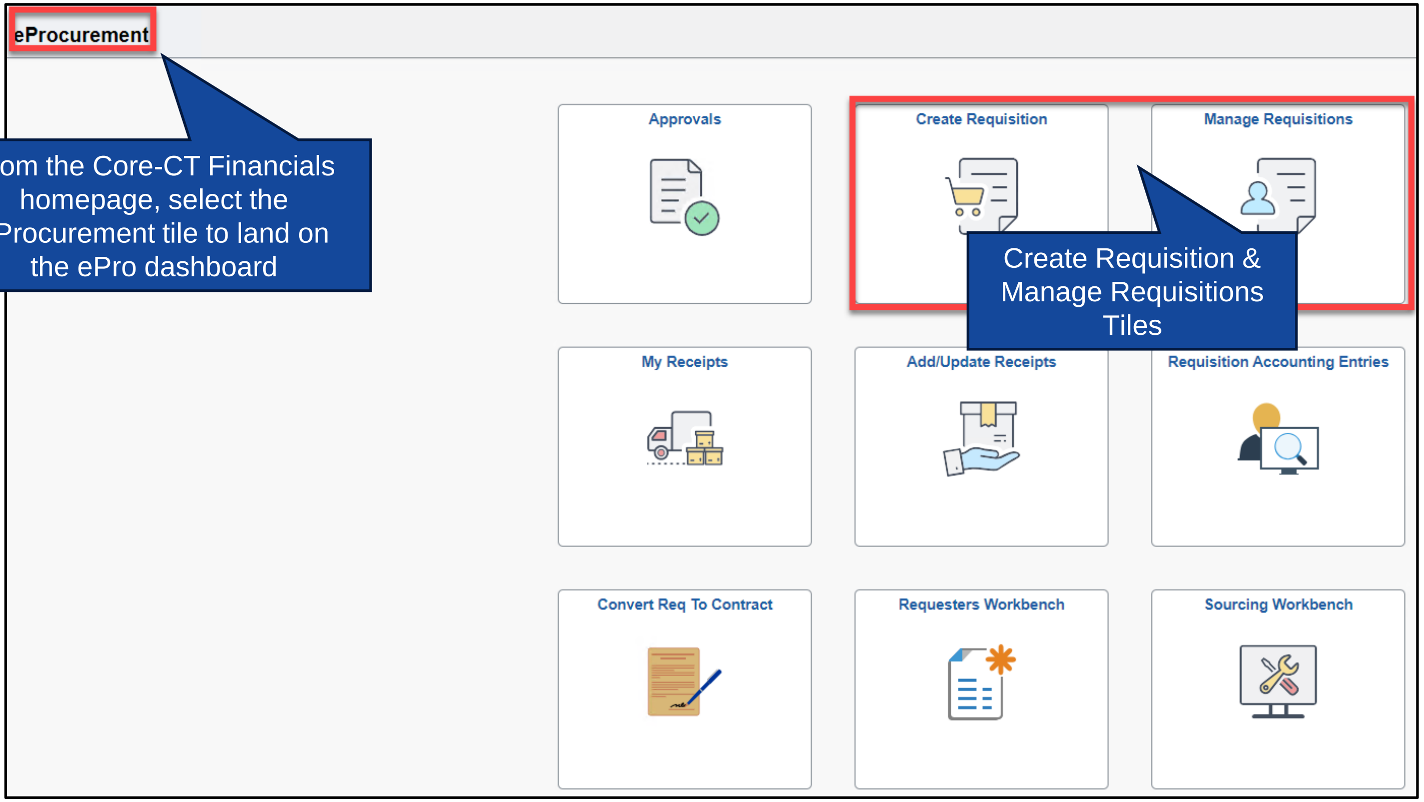
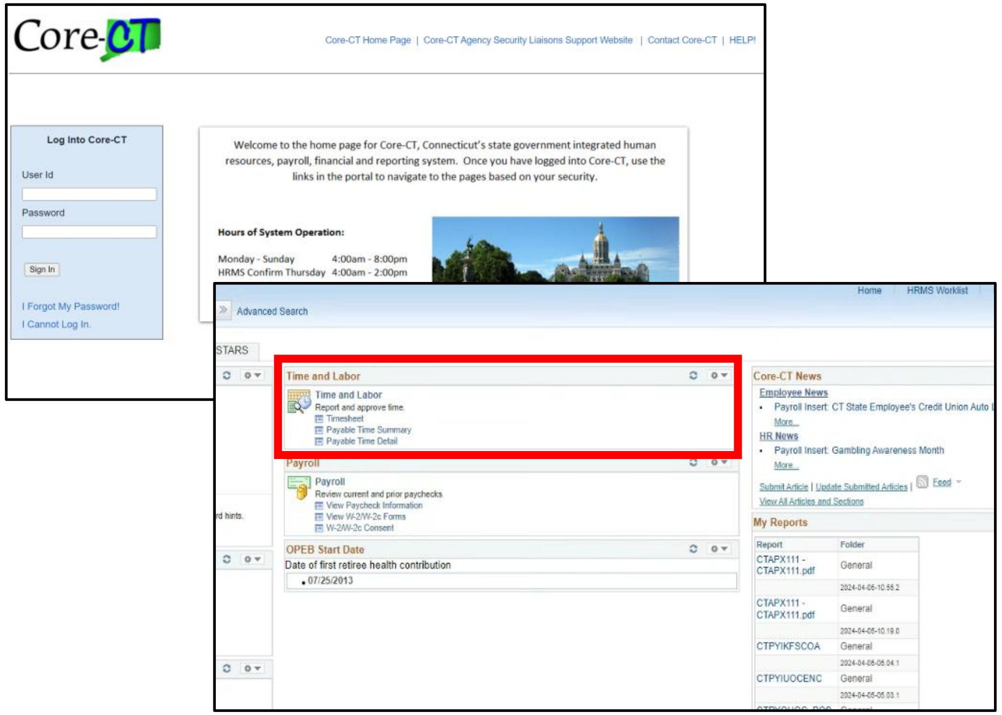


- Navigate to Core-CT Financials homepage, then click on **eProcurement** tile to access **Create Requisition & Manage Requisition** tiles to create/view requisitions

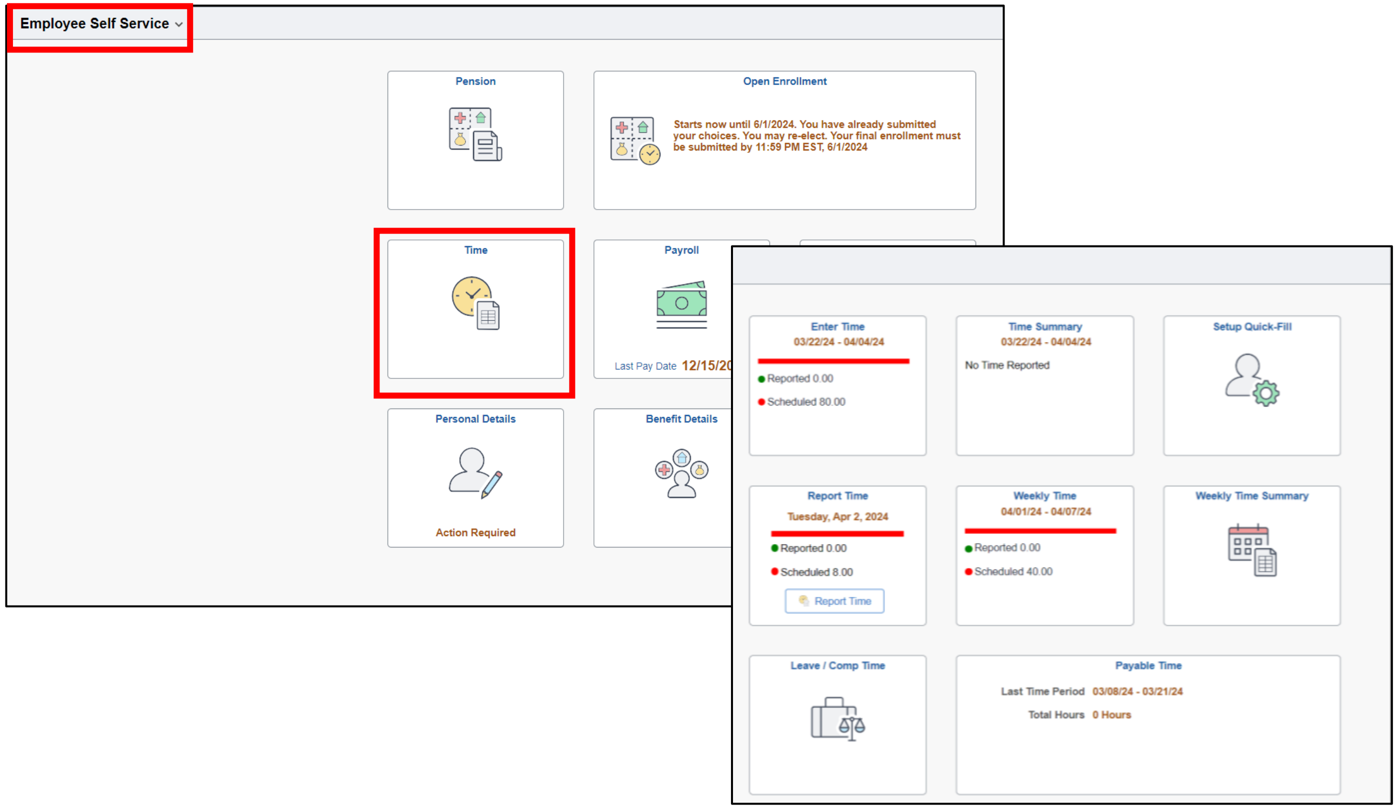
Timesheet Impacts

Current:



- Self Service > Time Reporting > Report Time > Timesheet
- Or can be accessed from the portal for quicker access

Update:



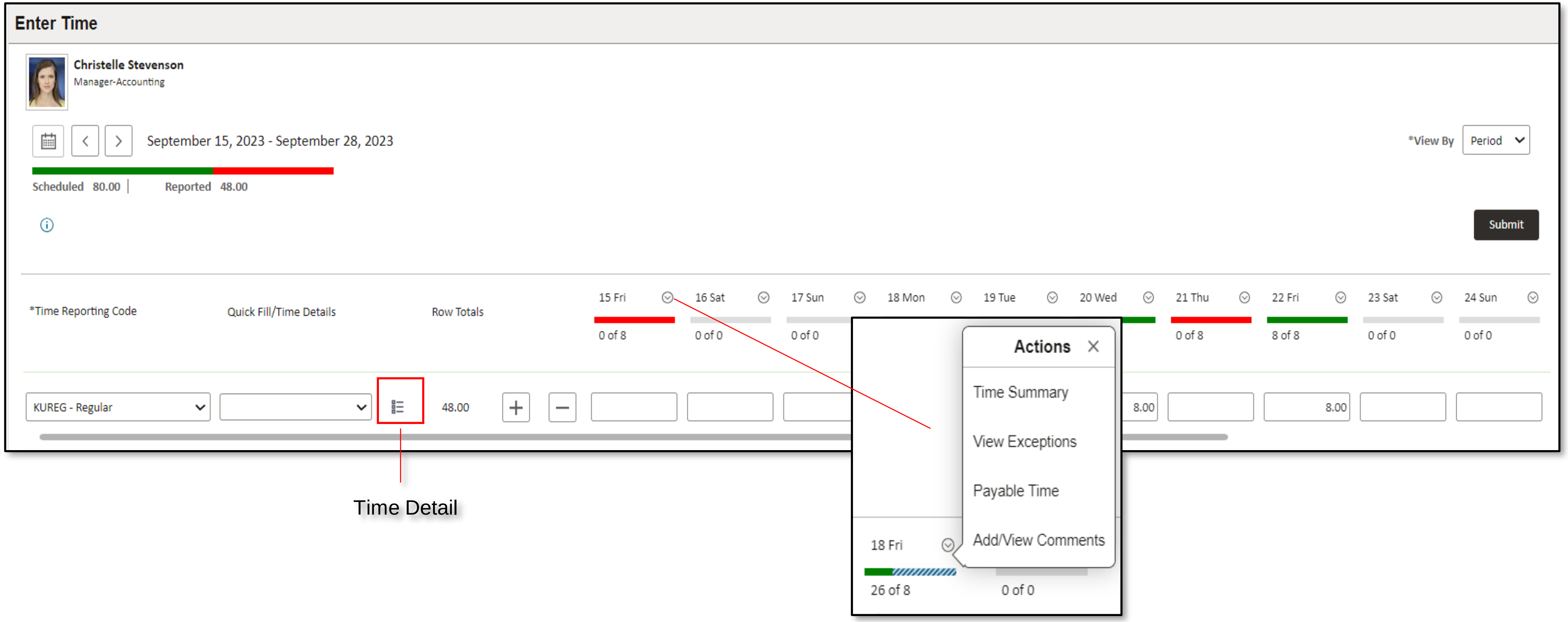
- Time can be entered by accessing the **Time** Tile from the Employee Self Service page

Timesheets Available for Entry

Timesheets available for entry	Desktop or Mobile time entry
Enter Time Page • Displays Time Entry by time pay period	Desktop Only
Weekly Time Entry Page	Both
Report Time Page • Displays Time Entry by Day	Both

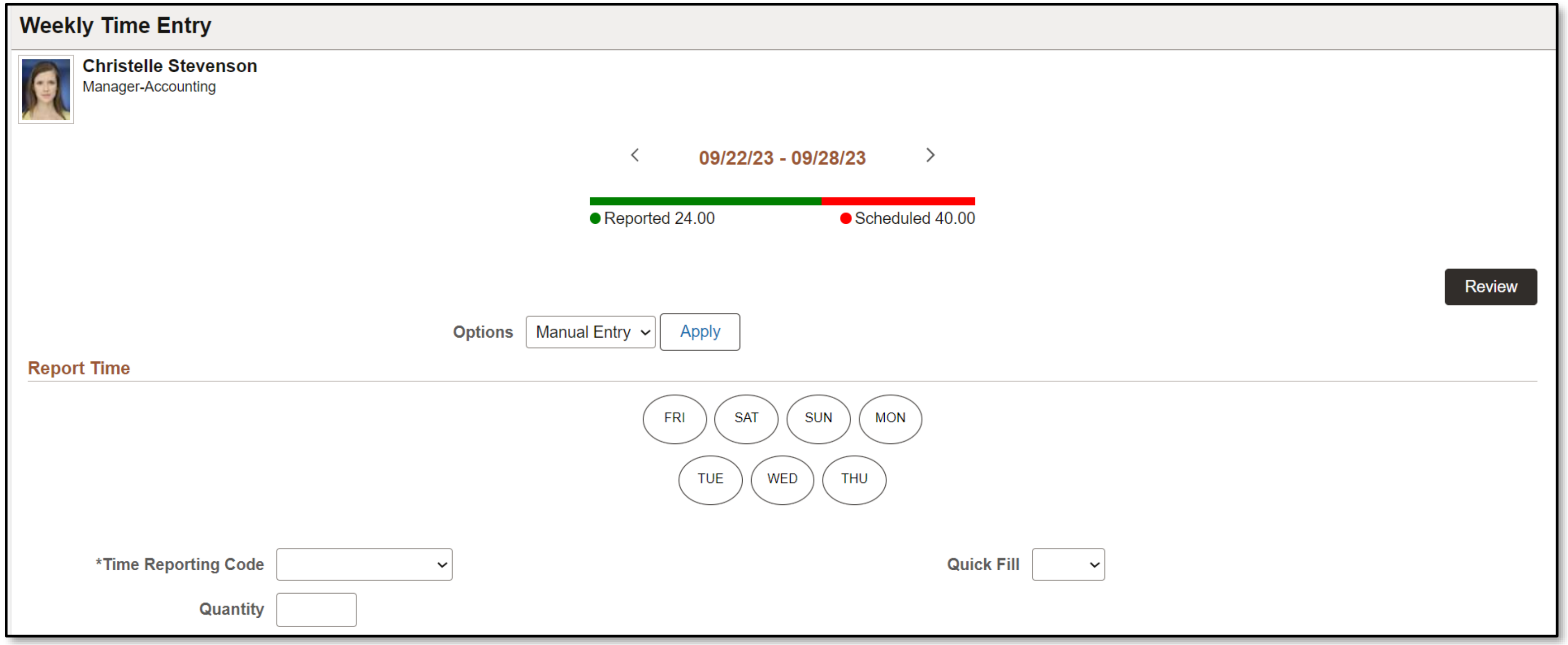
Enter Time Page

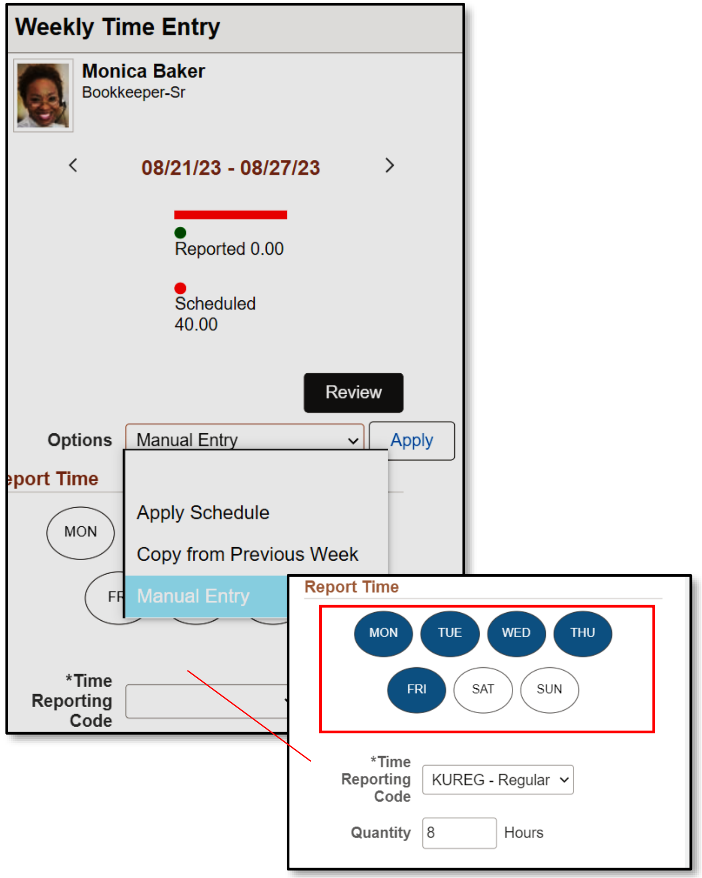
- Configured in collapsed view where an additional click is required to enter time detail such as shift, combo code etc.
- Tabs no longer exists on Timesheet to display reported time summary, leave and comp balances, payable time summary etc. This detail is available via individual tile or clicking on the drop-down arrow next to each day on the timesheet, which displays various actions.



Weekly Timesheet

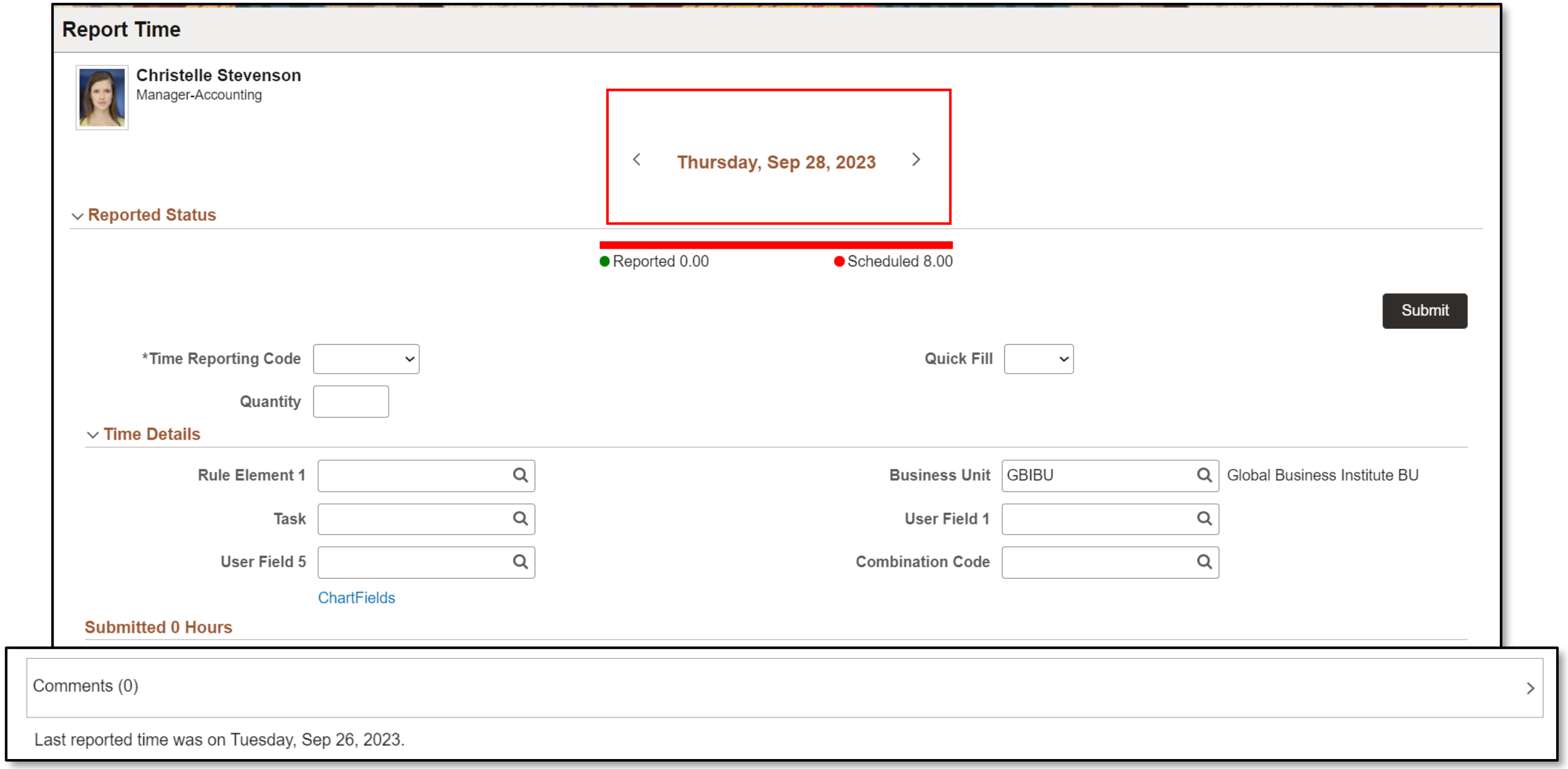
- Fields pay period begin and pay period end date and the pay period week 1 or 2 to will be displayed on the top of the weekly timesheet.

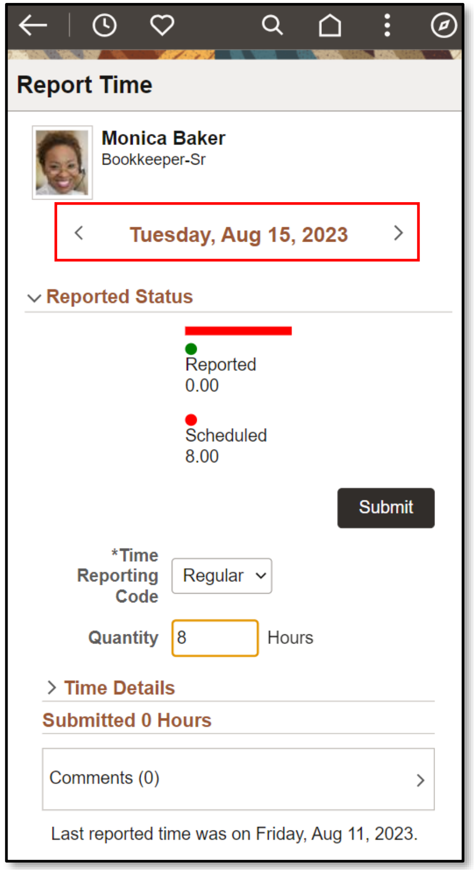




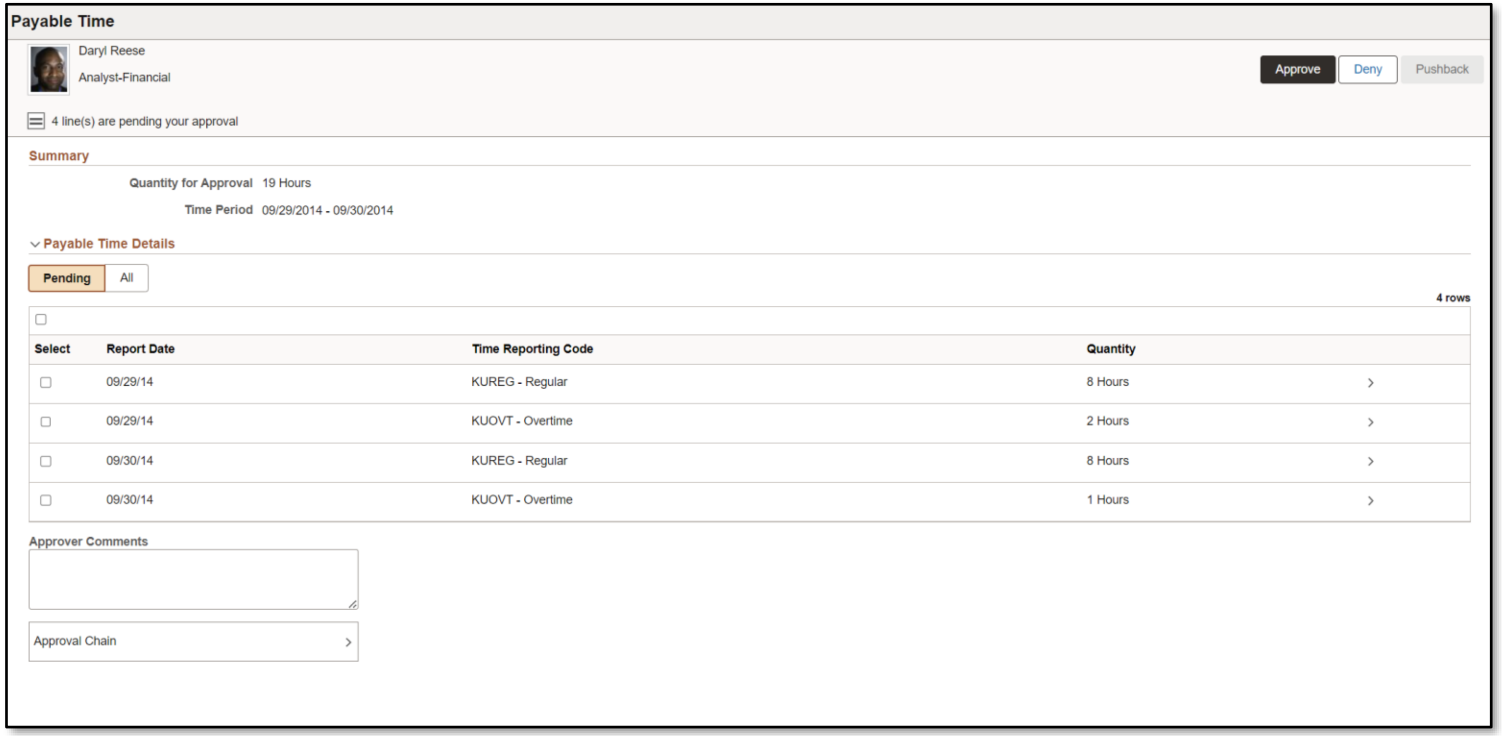
Report Time

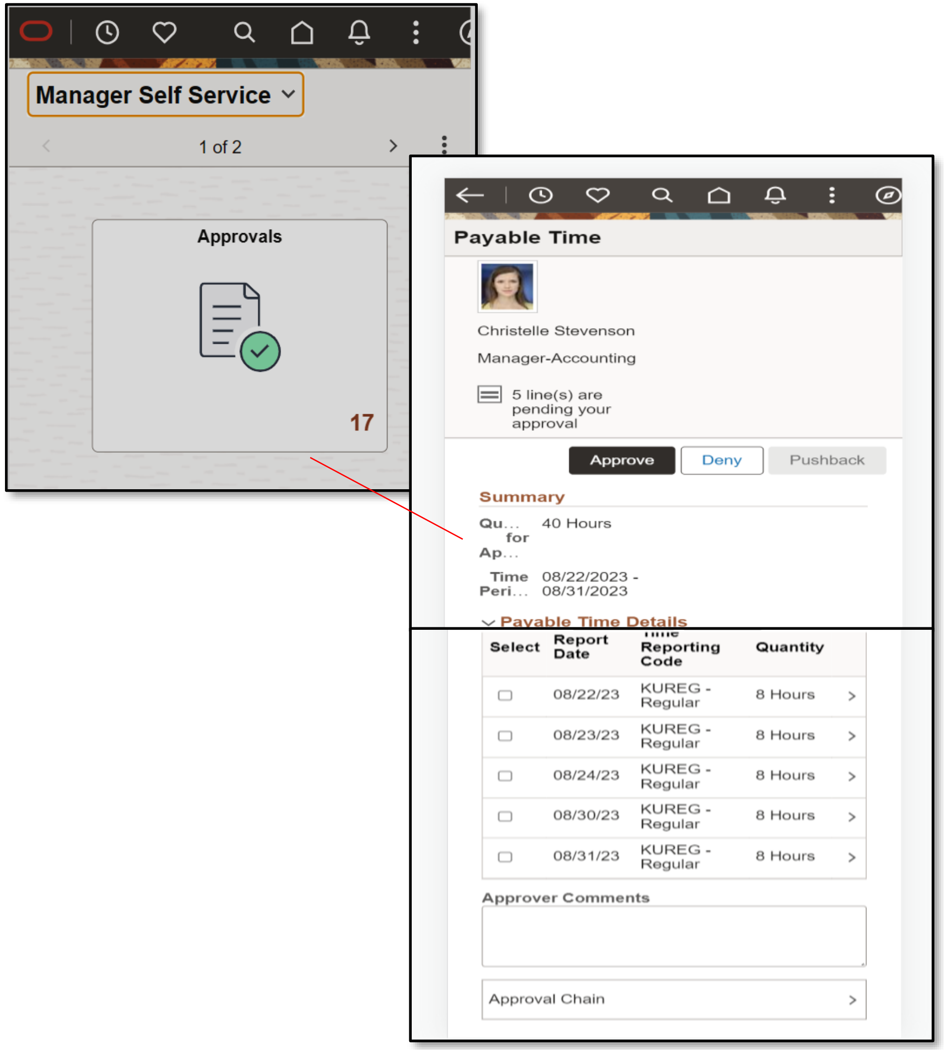
- Single Date will be displayed on the top of the Report Time sheet.





Timesheet Approval





Core-CT

What is OnBoarding?

- OnBoarding is the action or process of integrating new workers into an organization by providing a centralized location to enter all their personnel required data into the system.

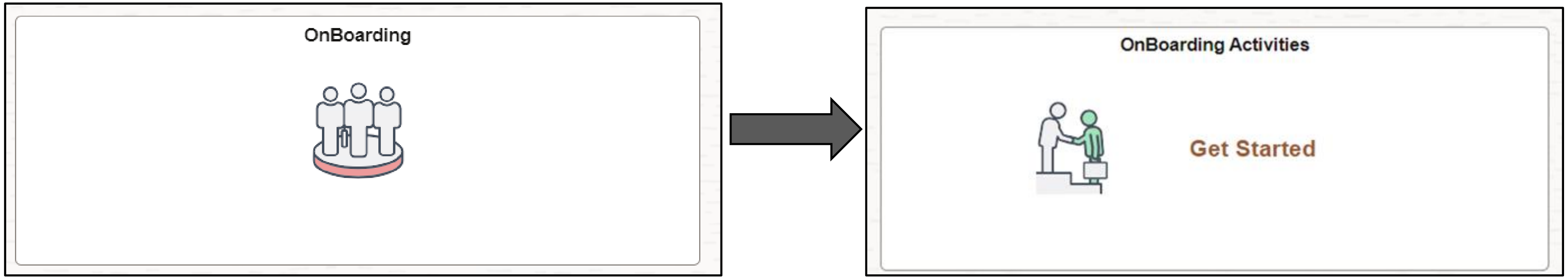
- The PeopleSoft OnBoarding pages consist of individual tasks, or steps, the worker needs to complete in accordance with his or her new job. The worker completes all tasks in the OnBoarding process and the data is automatically updated in the respective modules in the system.

- Employees can:
  - Download/upload forms - I-9, Direct Deposit, W-4 (State & Federal) Withholding Certificates, Designation of Retirement Plan Election, Designation of Retirement Plan Beneficiary, Application for purchase of Retirement Credit.
  - Verify/update:
    - Veteran Status, Ethnic Groups
    - Personal Details - Emergency Contacts, Marital Status, Address, Phone Number, Email Address.
    - Talent Profile – Degrees, Competencies, Licenses, Certifications
    - Benefits – Dependents/Beneficiary Info, Enroll in Benefits
    - Payroll – Voluntary Deductions, W-2/W-2C Consent
  - Upload other documents/attachments - Marriage/Birth certificates

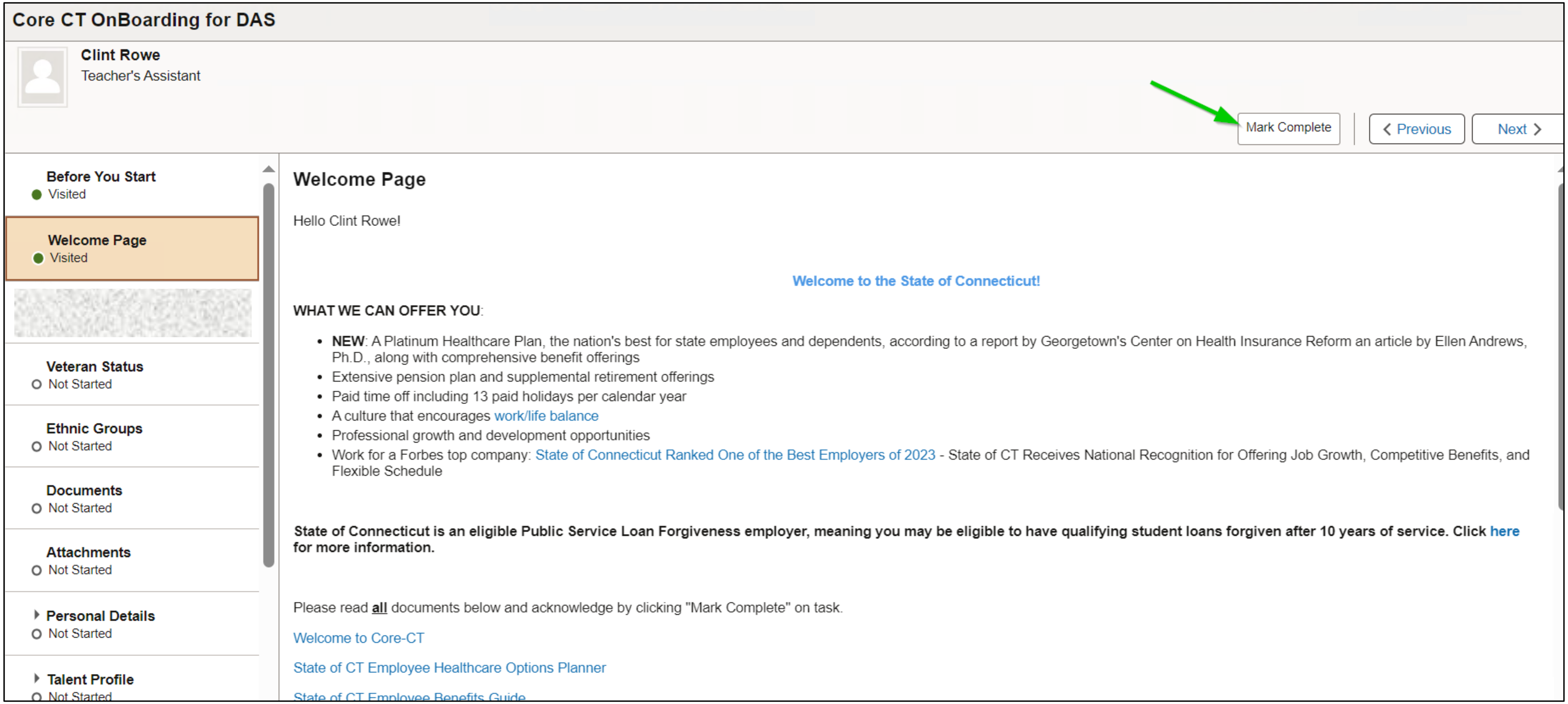
- Agency Specialists/Administrators can monitor the status of OnBoarding tasks – Not Started, In Progress, Complete, Cancelled

Employee Self Service Home Page - OnBoarding

- Employee receives an email notification to start the OnBoarding process.
- Employee logs in - the Employee Self Service Homepage displays the **OnBoarding** Dashboard which takes you to the **OnBoarding Activities** tile.
- Select the OnBoarding Activities tile to open the activity guide.



Employee Self Service – OnBoarding Activity Guide



HR Data Clean Up Awareness

"**Recycled**" and "**Denied**" positions can begin the data clean up process

Note:

Follow the fiscal year end process that is currently use.

"**Approved**" positions, agencies will be informed on proper steps for data clean up

Note:

*All positions need to be set as "**Approved**" when switching over to PUM*

Instructional updates for "**Proposed**" positions are still pending

Positions and other examples will be further detailed. More information about these tasks and deadlines coming soon!

Training Approach

Utilizing a blended approach with multiple mediums is recommended to address the variety of learning needs of the PUM stakeholders

	Training Delivery Experience		Performance Support
	Level 100 Courses All Core-CT Users	Level 200 Courses Specialized Core-CT Roles	E-learning Self-Study and Practice
Overview	**E-Learning** supported by Job Aids	**Virtual Instructor-Led Training** supported by Participant Guides and Job Aids	Job Aids and Videos will provide "on the job support"
Advantages	1. Short videos that can be viewed **anytime.** 2. Ability to train **users in multiple locations** at the same time. 3. **Scenario-based learning**: create realistic scenarios that reflect real-world situations.	1. Flexibility and **Convenience**, allows learners to participate in training sessions from any location with an internet connection. 2. Ability to demo the training environment and give users the **opportunity to practice** . 3. Engages the user group to accelerate adoption.	1. Offers flexibility to the learners to **upskill at their own pace** and anytime, anywhere. 2. Integrate different **elements**, such as an online platform, participant guides, videos etc. to increase engagement 3. Offers the ability to complete the training **more than once.**
Considerations	**1. Size of the stakeholder groups** and the number of trainings to complete **2. End user availability** to attend training sessions particularly those who work shift patterns	**1. Technology requirements** such as laptop/computer availability, Wi-Fi connection, audio etc. 2. Preparation required to ensure **virtual training is engaging**, especially if the training duration is for a long period of time.	**1. Technology requirements** such as laptop/computer availability, Wi-Fi connection, audio etc. **2. Reliance on users** to independently complete self-study training.

FIN L100 Training Curriculum

Level 100: Financials Navigation Overview			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **Navigation** module introduced by the upgrade. Upon completing this course, participants will be able to: • Navigate Core-CT through both Desktop and Mobile devices	All Core-CT Users	10 Minutes	E-Learning Video

Level 100: Strategic Sourcing			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **Strategic Sourcing** module introduced by the upgrade. Upon completing this course, participants will be able to: • Respond to ‘request for’ bid opportunities • Send reminder notifications to suppliers and bidders for completing and submitting bids before the event end date • Select and upload multiple attachments in the Sourcing Events Page	Agency Strategic Sourcing - Project Administrator Agency Strategic Sourcing – Project Viewer Agency Strategic Sourcing – Event Administrator Agency Strategic Sourcing – Event Viewer Agency Strategic Sourcing – Event Collaborator Agency Strategic Sourcing – Planner Agency Strategic Sourcing – Plan Viewer	10 Minutes	E-Learning Video

FIN L100 Training Curriculum – (cont.)

Level 100: Approvals			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **Approvals** module introduced by the upgrade. Upon completing this course, participants will be able to: • Approve Vouchers in Fluid • Approve Requisitions in Fluid • Approve Contracts in Fluid • Approve Purchase Orders in Fluid	Agency Accounts Payable Voucher Approver Agency Alternate Approver Agency ePro Requisition Amount Approver 1 Agency ePro Requisition Amount Approver 2 Agency ePro Requisition Amount Approver 3 Agency ePro Requisition Amount Approver 4 Agency ePro Budget Approver Agency Purchasing Contract Approver Agency Purchase Order Amount Approver 1 Agency Purchase Order Amount Approver 2 Agency Purchase Order Budget Approver Agency Inventory MSR (Material Stock Requests) Approver	10 Minutes	E-Learning Video

FIN L200 Training Curriculum – (cont.)

Level 200: Asset Management Approvals			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **Approvals** module introduced by the upgrade. This course will summarize the approval process for **Asset Management Approvers.** Upon completing this course, participants will be able to: • Approve asset management transactions	Agency Asset Management Approver	1 Hour	Virtual Instructor-Led Training supported by: • Participant Guide • Job Aids

Level 200: Procurement (Requisitions and Receiving Goods & Services)			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **eProcurement** module introduced by the upgrade. Upon completing this course, participants will be able to: • Quickly create requisitions for Catalog and Special request items • View Create Requisitions component in Fluid • Enter multiple Schedules for a Line, and multiple Comments and Attachments at the Header, Line and Schedule levels • Use the Create Receipt tile to create new receipts • Use the My Receipts tile to view and edit receipts and initiate supplier returns • Manage the persistent cart on desktop and mobile devices	Agency Cancel Requisitions Agency Delete Requisitions Agency Requisitions Amount Approver 1 Agency Requisitions Amount Approver 2 Agency Requisitions Amount Approver 3 Agency Requisitions Amount Approver 4 Agency Requisition Budget Approver Agency Requisition Closer Agency Catalog Viewer Agency Item Processor Viewer	1 Hour	Virtual Instructor-Led Training supported by: • Participant Guide • Job Aids

HR L100 Training Curriculum

Level 100: Navigation Overview			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **Navigation** module introduced by the upgrade. Upon completing this course, participants will be able to: • Navigate Core-CT through both Desktop and Mobile devices	All Core-CT Users	10 Minutes	E-Learning Video

Level 100: eProfile Self-Service			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **eProfile** module introduced by the upgrade. Upon completing this course, participants will be able to: • View and change their personal information online in Fluid	All Core-CT Users	10 Minutes	E-Learning Video

HR L100 Training Curriculum - (cont.)

Level 100: Life Events Self-Service			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **Life Events** module introduced by the upgrade. Upon completing this course, participants will be able to: • View their benefit information in Fluid • Manage life events that effect their benefits and coverage in Fluid	All Core-CT Users	10 Minutes	E-Learning Video

Level 100: Open Enrollment Self-Service			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **Open Enrollment** module introduced by the upgrade. Upon completing this course, participants will be able to: • Enroll in the benefits program during open enrollment periods	All Core-CT Users	10 Minutes	E-Learning Video

HR L100 Training Curriculum - (cont.)

Level 100: Time and Labor Self-Service			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **Time and Labor** module introduced by the upgrade. Upon completing this course, participants will be able to: • Enter and submit time on both desktop and mobile devices in Fluid	Agency TL – Time Reporter	10 Minutes	E-Learning Video

Level 100: ePay Self-Service			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **ePay** module introduced by the upgrade. Upon completing this course, participants will be able to: • View and print their paychecks in Fluid • Access paycheck data details in Fluid • Request or withdraw consent to receive paper W-2, W-2c, and tax withholding forms in Fluid	All Core-CT Users	10 Minutes	E-Learning Video

HR L100 Training Curriculum - (cont.)

Level 100: Delegations			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the new functionality of **Delegations** introduced by the upgrade. Upon completing this course, participants will be able to: • Delegate certain transactions to other employees • View, accept, deny transactions delegated to them • Revoke any active delegation requests	Agency HR – Position Approver Agency HR – eProfile Approver Agency Benefits – Approver Agency TL – Approver	10 Minutes	E-Learning Video

Level 100: Approvals			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **Approvals** module introduced by the upgrade. Upon completing this course, participants will be able to: • Approve agency level e-profile changes to authorize self-service name and address changes in Fluid • Use the AWE (Approval Workflow Engine) • View all pending approvals in one centralized location • View and clear exceptions	Agency HR – Position Approver Agency HR – eProfile Approver Agency Benefits – Approver Agency TL – Approver	10 Minutes	E-Learning Video

HR L200 Training Curriculum - (cont.)

Level 200: Managing Job			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **Managing Job** module introduced by the upgrade. Upon completing this course, participants will be able to: • Administer HR processes to maintain employee jobs, status, and data • Hire and Rehire an Employee • Dual Employment Processing • Maintain Employee Job Information/Data o Salary Increases o Transferring an Employee o Supervisor Changes	HR Specialist Statewide Viewer Agency Viewer	1 Hour	Virtual Instructor- Led Training supported by: • Participant Guide • Job Aids

Level 200: Position Management			
Objectives	**Audience**	**Duration**	**Delivery Method**
This course covers the changes to the **Position Management** module introduced by the upgrade. Upon completing this course, participants will be able to: • Access position management fluid pages and dashboards • Manage positions for new and existing positions • Clone positions and rows • Review transactions status	Position Specialist Agency Personnel Administrator Agency Budget Specialist DAS Analyst OPM Analyst OPM Senior Analyst OPM Section Director OPM Budget Director	1 Hour	Virtual Instructor- Led Training supported by: • Participant Guide • Job Aids

HR L200 Training Curriculum – (cont.)

<table>
<tr><th colspan="4">Level 200: Position Approval</th></tr>
<tr><th>Objectives</th><th>Audience</th><th>Duration</th><th>Delivery Method</th></tr>
<tr><td>This course covers the changes to the Position Approval module introduced by the upgrade.

Upon completing this course, participants will be able to:
• Understand the approval process for positions
• Approve and/or deny position approvals</td><td>Position Specialist
Agency Personnel Administrator
Agency Budget Specialist
DAS Analyst
OPM Analyst
OPM Senior Analyst
OPM Section Director
OPM Budget Director</td><td>1 Hour</td><td>Virtual Instructor- Led Training supported by:
• Participant Guide
• Job Aids</td></tr>
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MFA Update

- Core-CT is currently evaluating options for the deployment of MFA, and we are planning for next steps.
- Training has been postponed and additional information will be provided as soon as possible.

Modernization Page

The Core-CT Modernization page will be updated to display materials that change agents can use for reference about system upgrades and modernization efforts.

Change Agent Meeting Recordings will be posted here.

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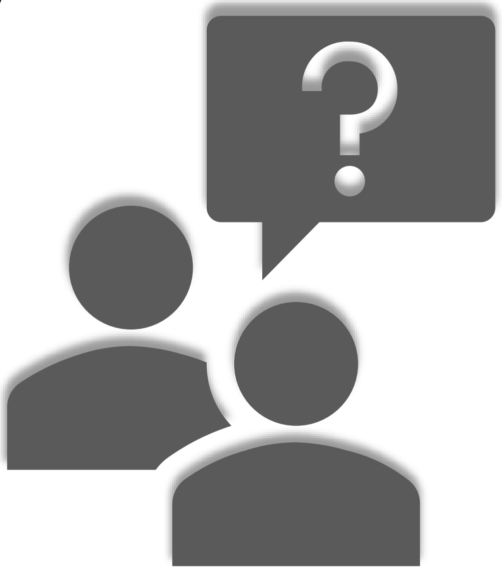
Reminders

- Share information with your agency
- Add the Modernization page to your Favorites in your Browser
- Consider User Acceptance Testing participants
- Prepare to update internal training documentation after upgrade

Let’s Take a Survey!

Please go to www.menti.com and enter code in chat

- Have you shared Change Agent Presentation materials with your agency users?
- What other PUM related materials would be helpful to share with your agency users?
- How are agency users feeling about the PUM Upgrade?



Core-CT

Questions

Glossary

- **Fluid**: a standard user interface that provides users with the ability to access PeopleSoft applications across a variety of ways from smartphones to tablets to desktops/laptops
- **Navigation Collection:** provides a list of shortcuts to access pages on the left side of the page
- **Tiles:** various applications displayed on the Fluid homepage that navigates user to the selected option
- **Homepage/Dashboard:** provides quick access to useful information by presenting tiles to the user