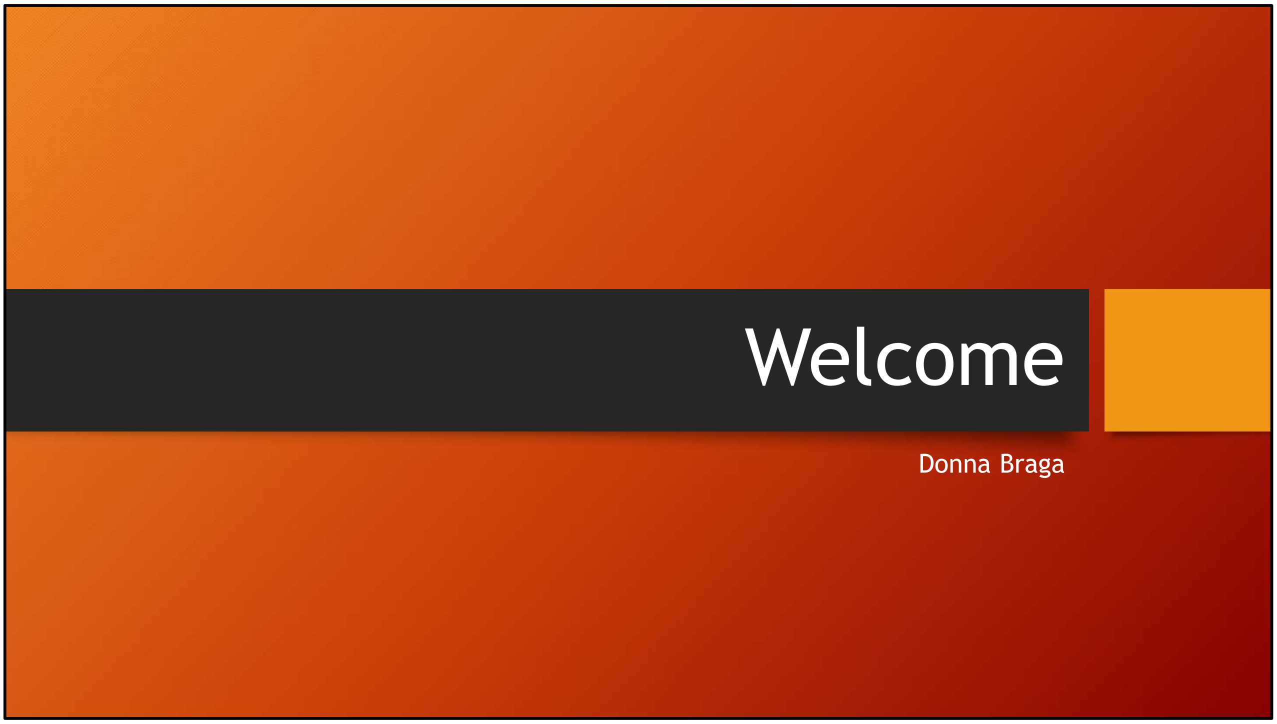
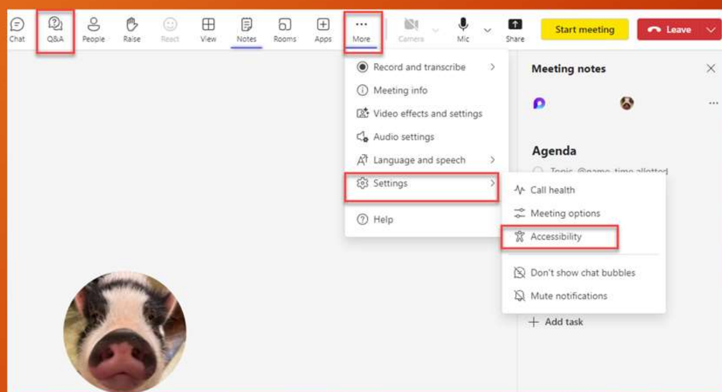
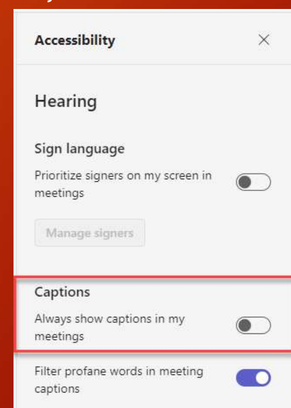

Core-CT FIN PUM Delta User Group
AR/BI/GL/GRT/PC
November 19, 2024


Welcome
Donna Braga

Welcome - Accessibility

- We have now enabled the Q&A feature for questions.
- Accessibility Capability is available on Webinar, it must be turned on by users individually.





We have now enabled the Q&A feature in Teams for questions.

Accessibility can be turned on by clicking on More, then Settings, then Accessibility. Once in Accessibility, you can turn on Captions.

Welcome

We will be here to guide you down this new path.

Agenda

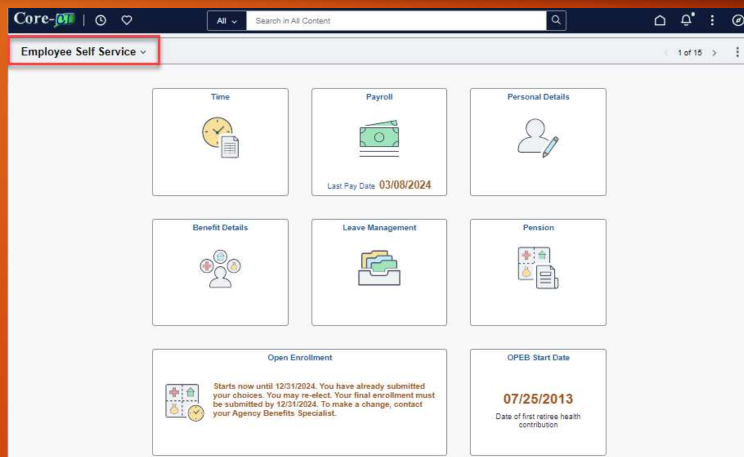
• Welcome	Donna Braga
• Navigation & Approvals	Brianne McKenna
• AR	Chris Marchese
• BI	Agnes Kowalewska
• GL	James Klaben
• GRT	Vanessa Hoang
• PC/CC	Vanesssa Hoang
• EPM/STARS	Wendy Monk
• Security	Dustin Guarino
• Help Desk	Shanon Reutter
• Closing	Brianne McKenna

Navigation Agenda

- Navigation Home Page
- Navigation - Tiles
- Navigation - Nav Bar Menu
- Nav Bar Menu – Alphabetize
- Nav Bar Menu - Collections

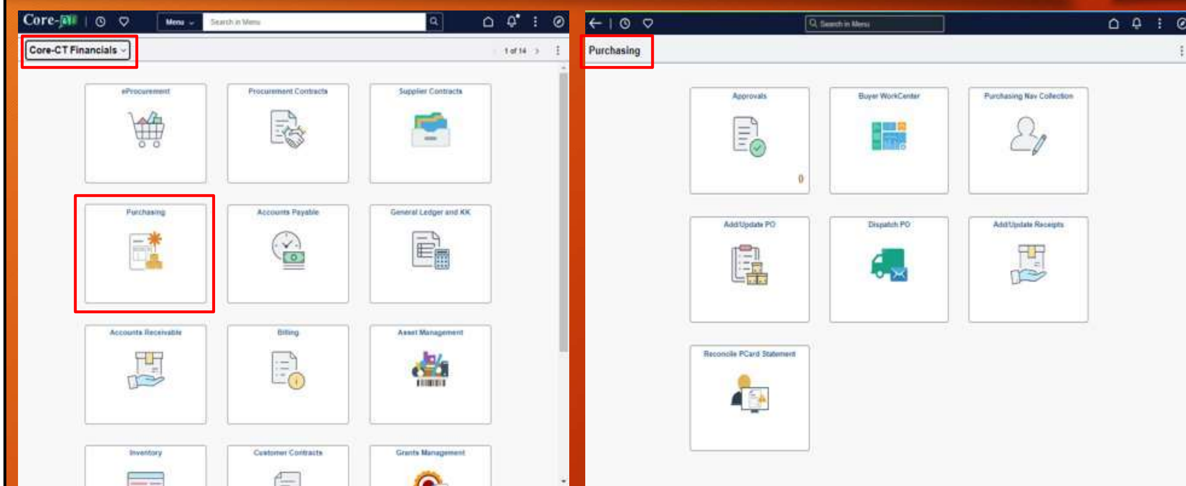
Welcome to the Navigation section.

Navigation – Home Page



When you log into Core-CT you will now be directed to a homepage.
Select the homepage related to your task.
In this next example we will navigate to Core-CT Financials.

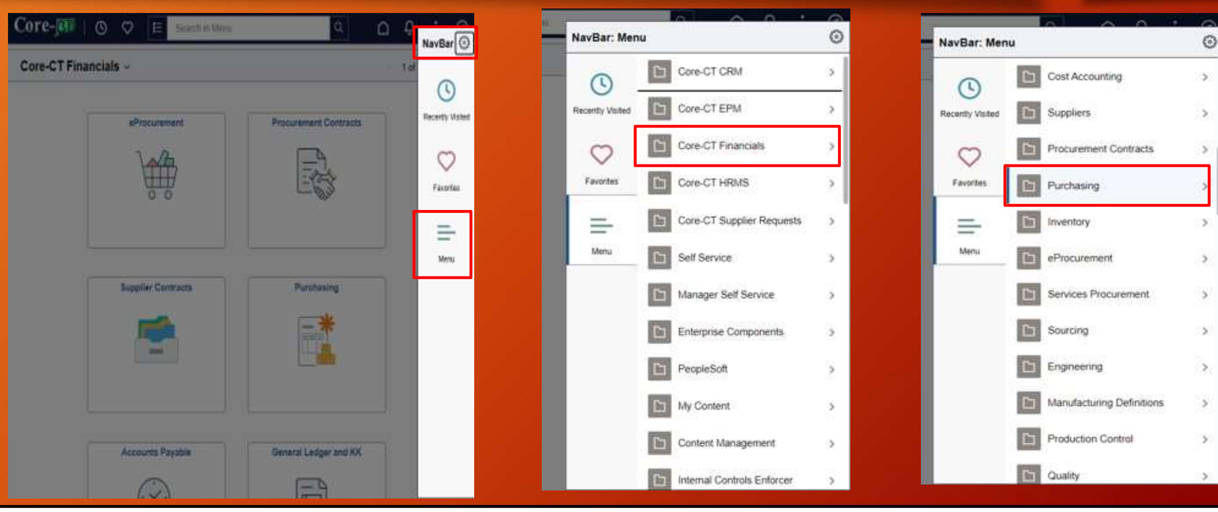
Navigation - Tiles



In the previous slide, Core-CT Financials was selected. Now, In this example above, we use Purchasing. Clicking on the purchasing tile will direct you to the purchasing homepage, made up of more security related tiles.

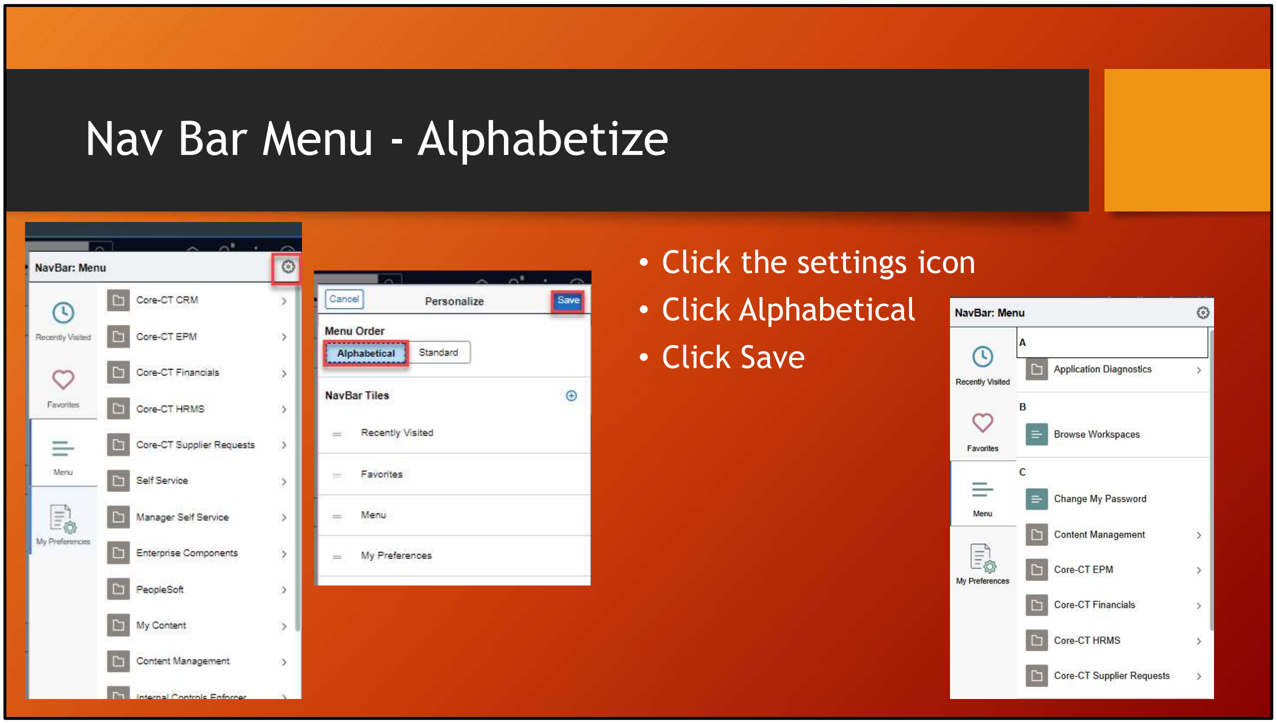
Tiles are high action boxes located on the home pages based on your roles.

Navigation – Nav Bar Menu



On the top right you will see a circle with an arrow in it. This is the NEW! Navigation Bar that replaces the previous Navigation Drop Down Menu.

When you select the Nav Bar you can drill into modules like you normally have. Also, The Bread Crumbs are now located inside the menu navigation, we will see this screen shot in a later slide.

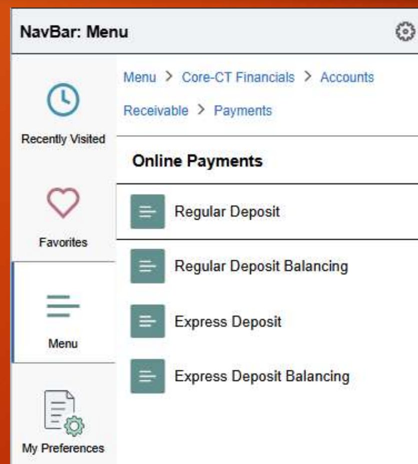


I know in the past some users like the option to alphabetize their menu. Especially if you work in the Accounts Payable Module ☺ This is still an option.

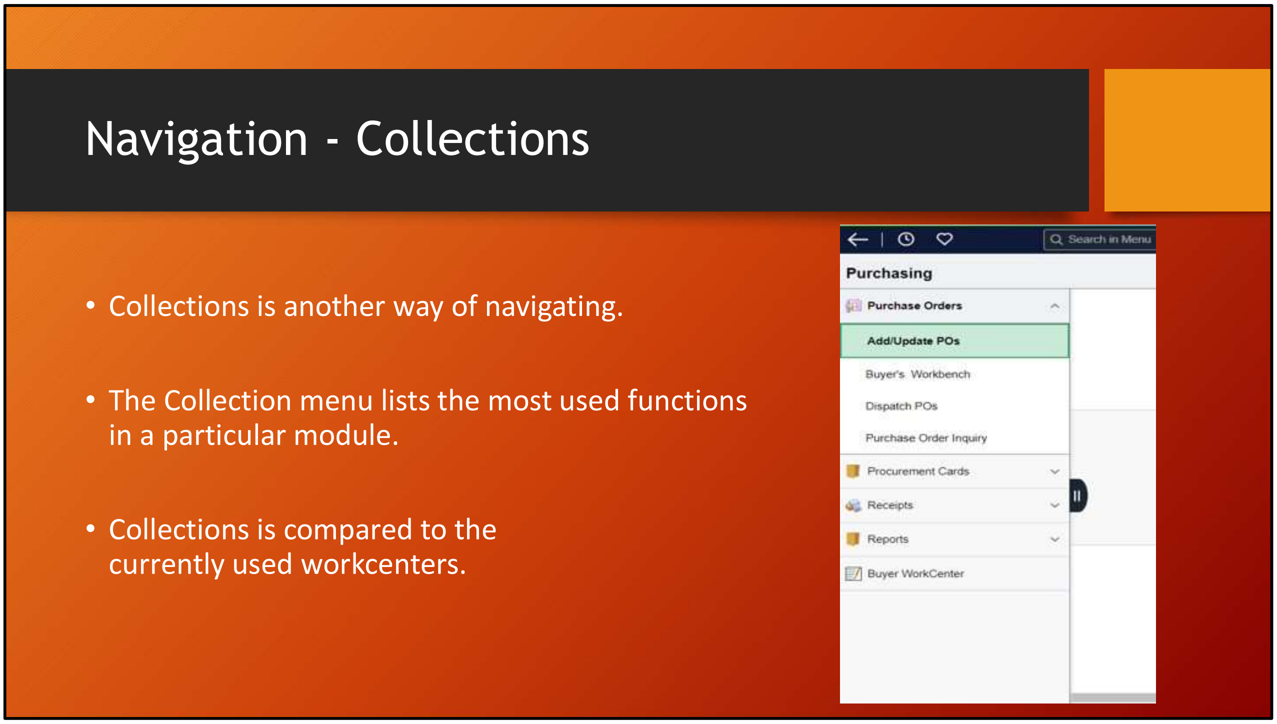
All you have to do is click the settings wheel icon, located inside the Nav Bar and select alphabetical and click save.

Nav Bar Menu – Bread Crumbs

- We still have bread crumbs as we do today located at the top of the Nav Bar Menu



As mentioned in a previous slide, the bread crumbs/menu navigation is located at the top of the Nav Bar.



Navigation Collections is a new functionality of high action processes for your module. It will help your daily tasks run smoother because you are in a one stop shop.

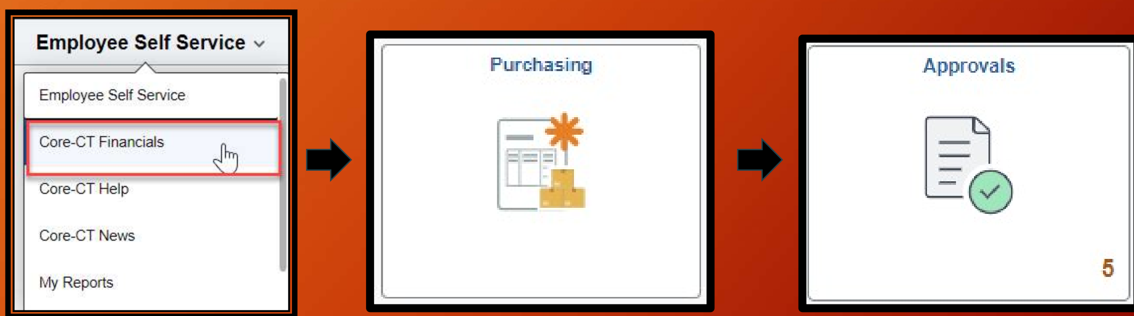
Although it has not yet been delivered to all modules, we anticipate rolling it out in the future for those who will not see it with this upgrade. The functionality is very similar to WorkCenters, and it will most like be based on personal preference which you choose.

Approvals Agenda

- Approvals – Fluid
- Notifications – Bell
- Notifications – Settings
- Notifications – Actions/Alerts

Approvals – Fluid

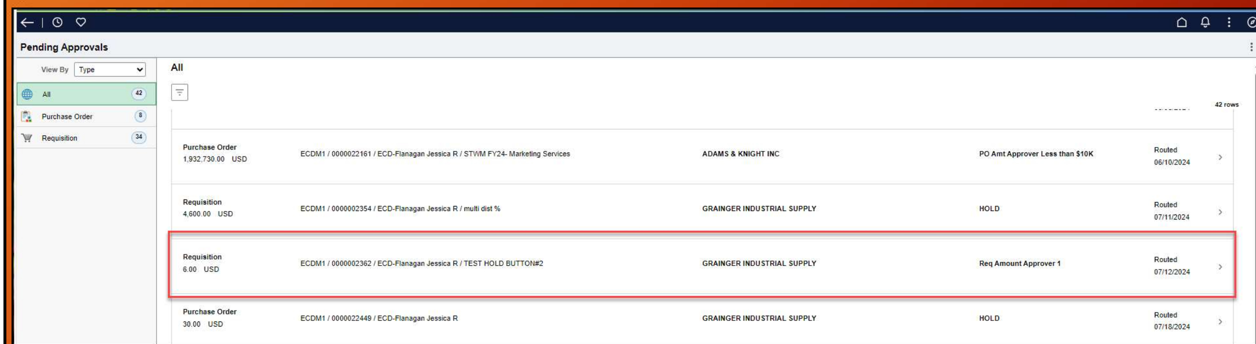
- Approvals are now through the Fluid Approval Tile depending on your module.
- The modules with Approval Tiles are eProcurement, Purchasing, Accounts Payable, Asset Management, Grant Management and Security.



Example: Navigate to Core-CT Financials and click the Purchasing tile and then the approvals tile. This will bring you to the new Pending approvals page.

Approvals – Fluid

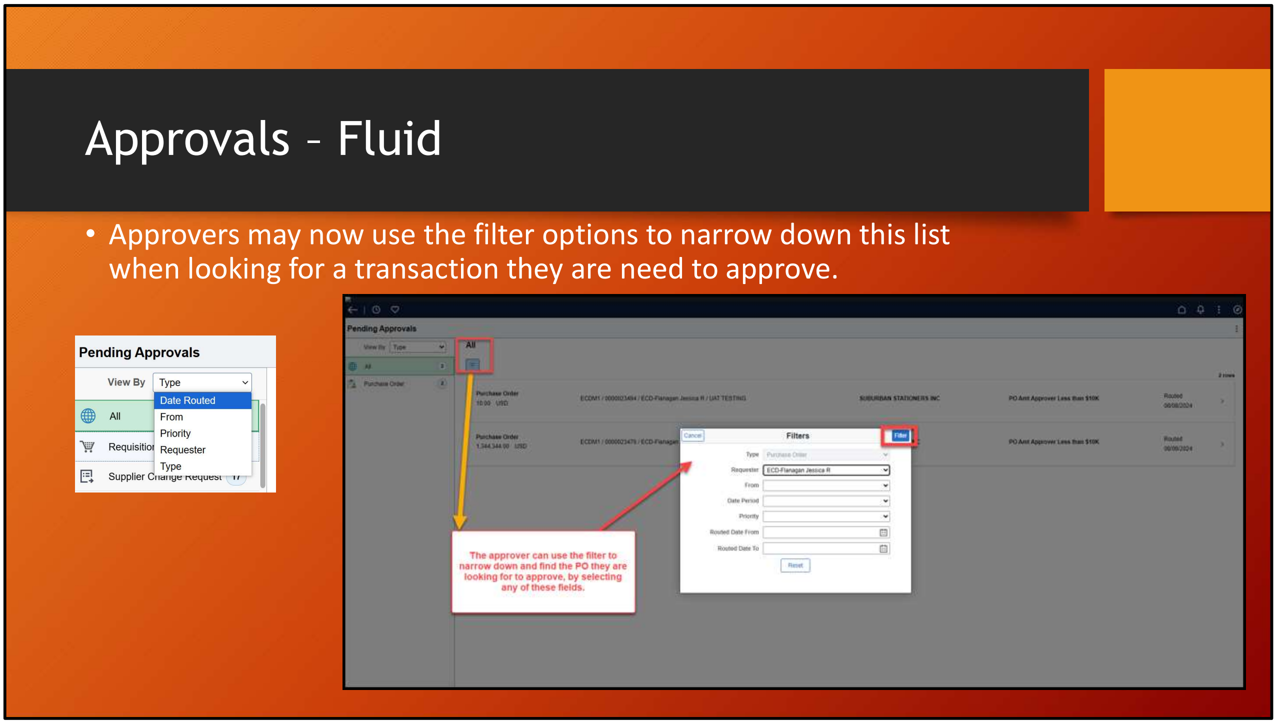
- This is the Pending Approvals page that the previous tile brings you to.



The new pending approvals page will capture all approval related documents waiting approval.

You click on each row individually and to drill into the document to approve.

The biggest change here is that this replaces the **worklist**.

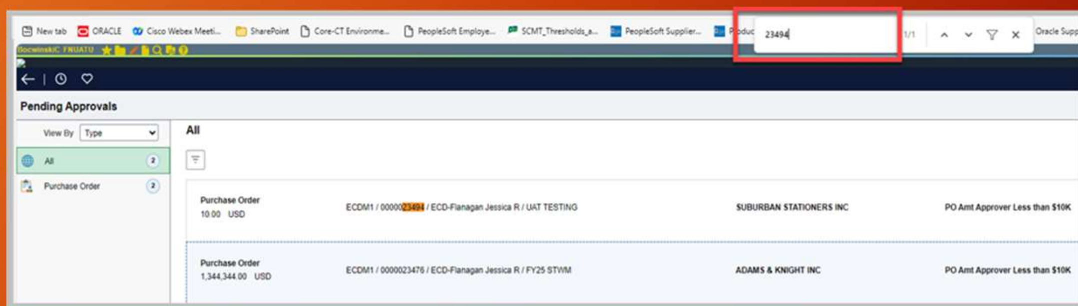


The pending approvals page will capture all of the approvals you may have in this one interface. Depending on your roles it is possible to see ePro transactions, and PO transactions. In order to help filter these transaction there is a filter box option at the top of the page. Here you can sort by requestor, date transaction id etc.

In this example on the left-hand side of the pending approval page it separates documents by type (or Module). You have the option to use Date Routed, From, Priority, Requester and Type.

Approvals – Fluid

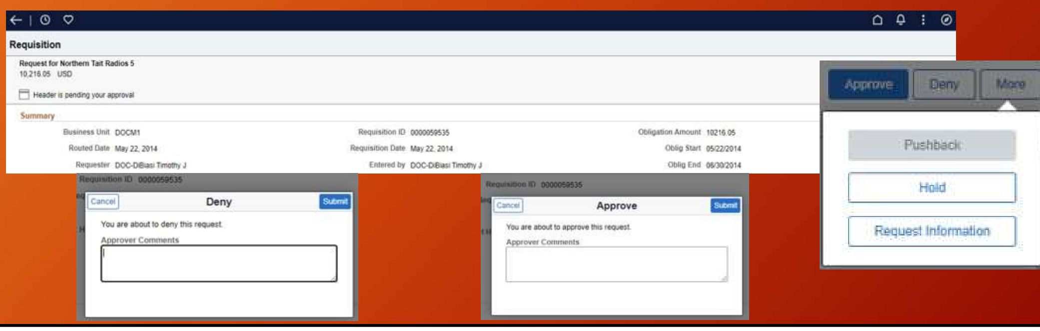
- A great tip is the you can click CTRL + F and search on a specific item number.
- The results with highlight in orange.



If you have a long list of approvals and need a specific document number a great tip is to click CTRL + F and enter the number.

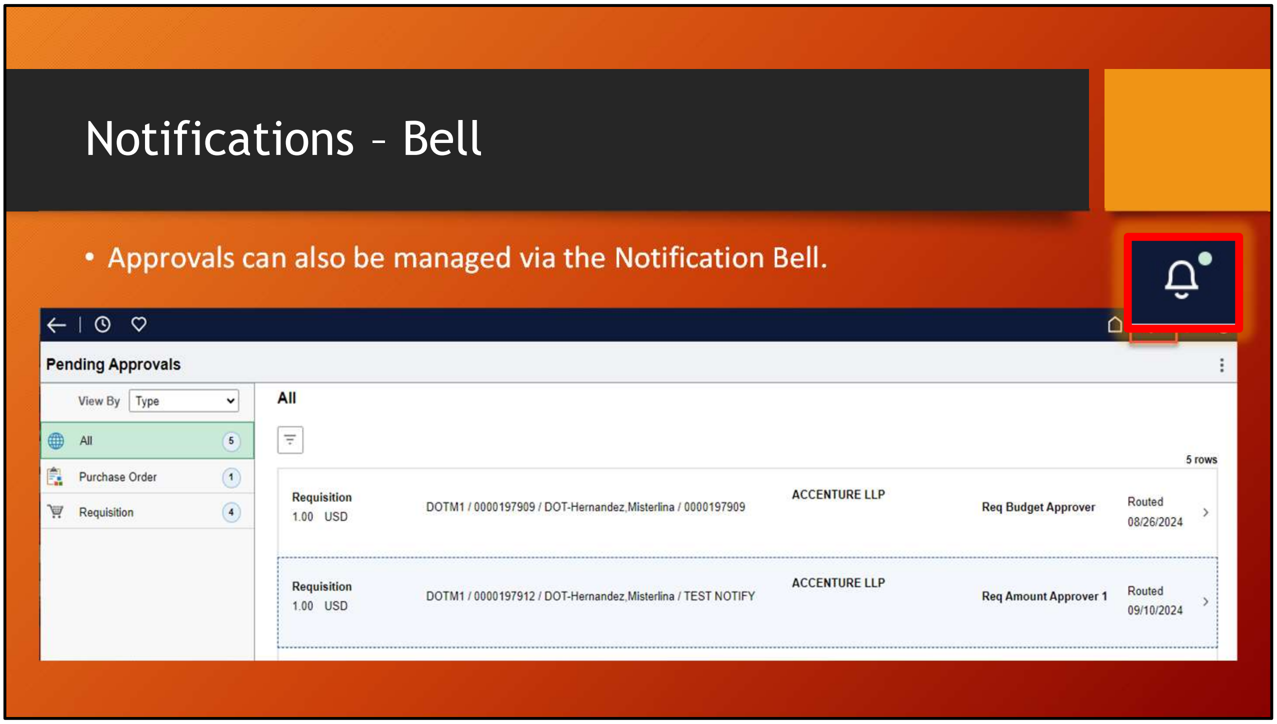
Approvals – Fluid

- Once a transaction is selected, you have 5 options depending on your module...Approve, Deny, Pushback, Hold, and Request Information
- Once the approve button is clicked you have the option to add Comments, any other action comments are mandatory.

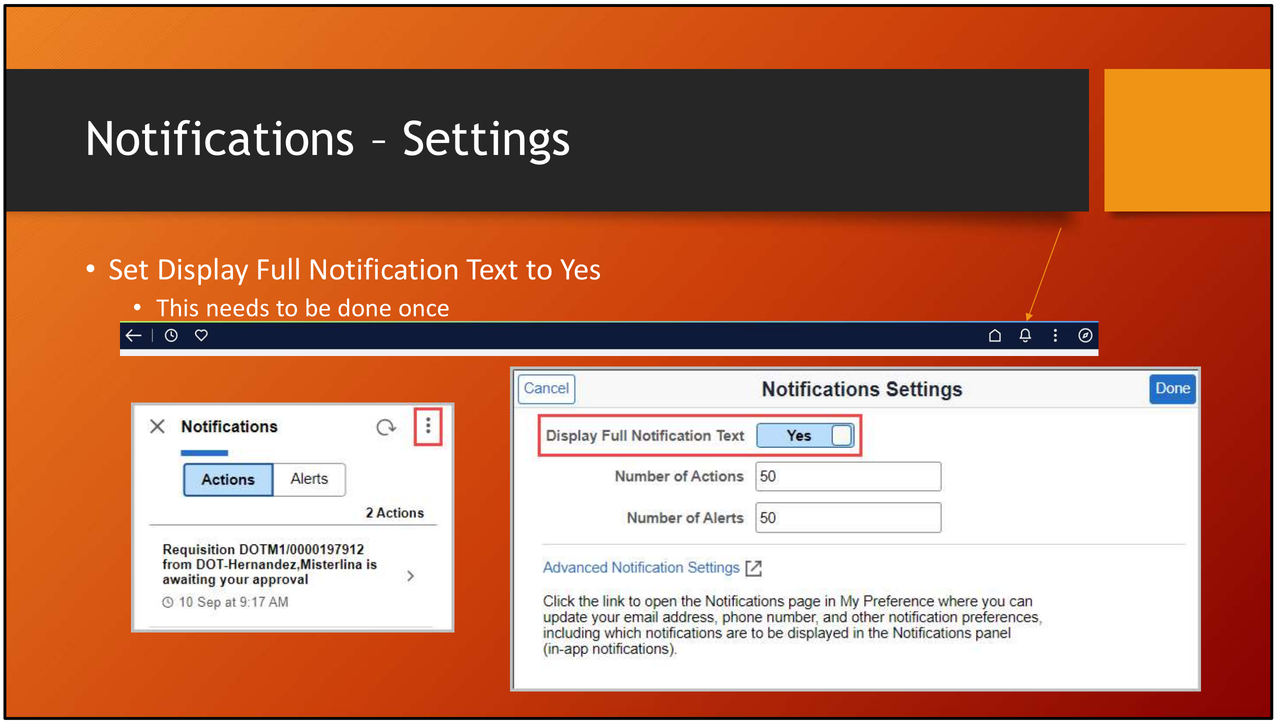


Comments are mandatory for denials, pushback, hold and request information.

Each module will discuss this more in depth in their individual section.



The new Notification Bell can also be used to organize approvals. This is located at the top right hand side of the page

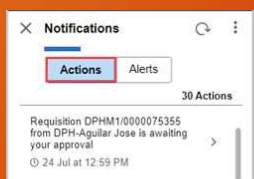


In order to display your full Notifications, you will have to configure your notification settings.

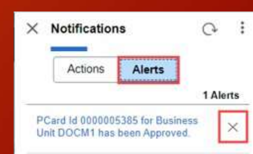
Click the notifications Bell, then click the 3 dot ellipsis, select settings. Make sure the 'Display Full Notification Text" is toggled to 'Yes'

Notification – Actions/Alerts

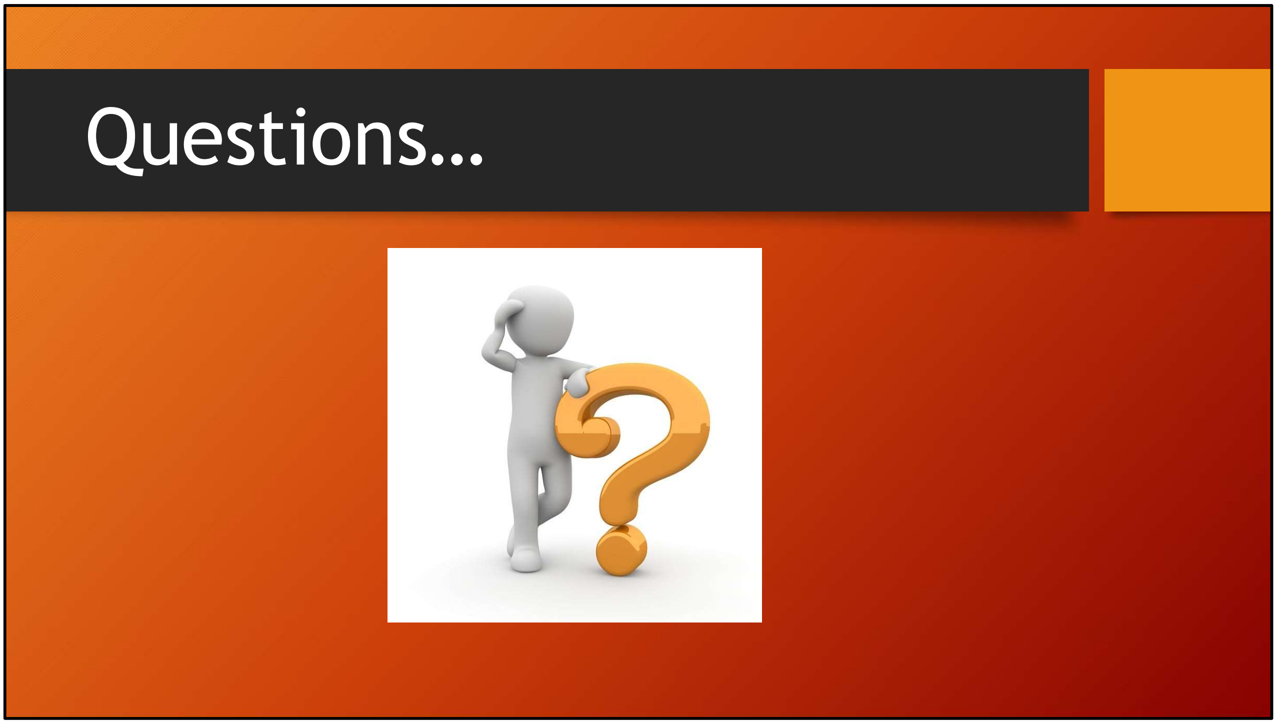
- Depending on the module and transaction type, a notification Action or Alert will be created.
- Clicking on either will take the user to the specific transaction.
- The key difference is that after a user processes the transaction (e.g. approve) a Notification Action will be cleared from the list.



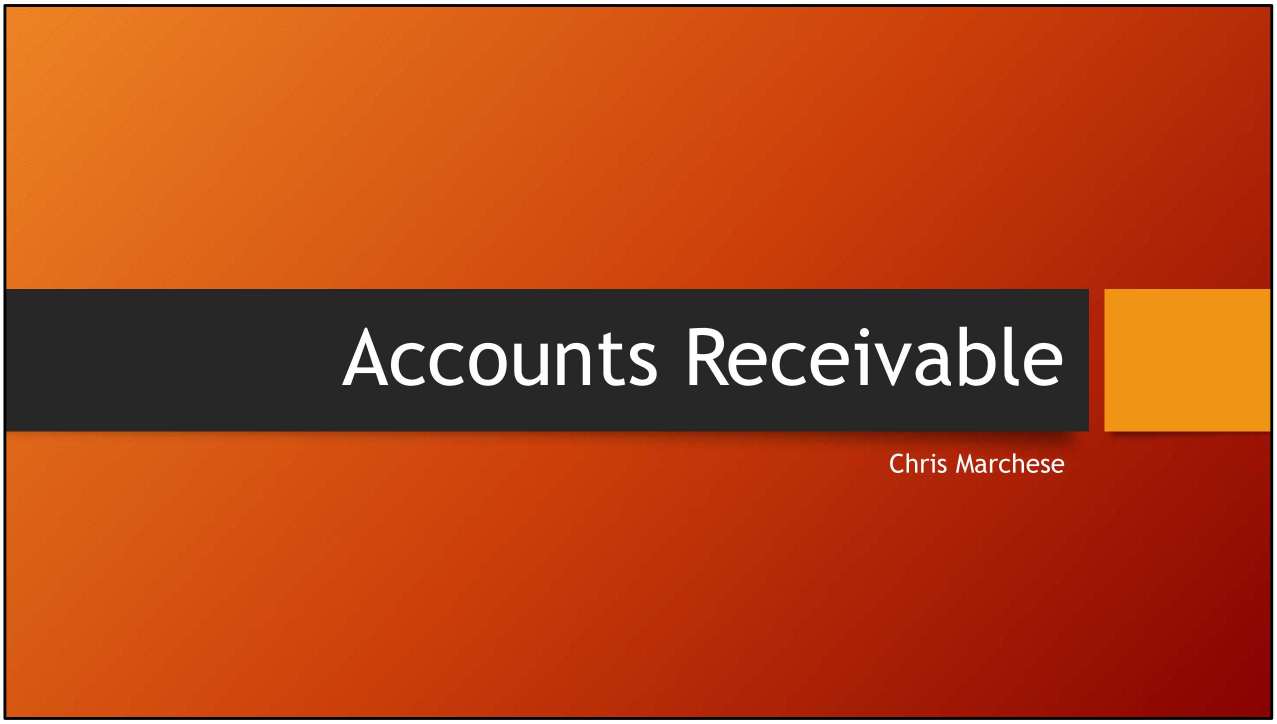
- Alerts are maintained by the users. To remove one from the list, click the X.



Each module will discuss this in more depth as we move on.



We went over the most noticeable eProcurement changes in fluid. Are there any questions I can answer at this point?

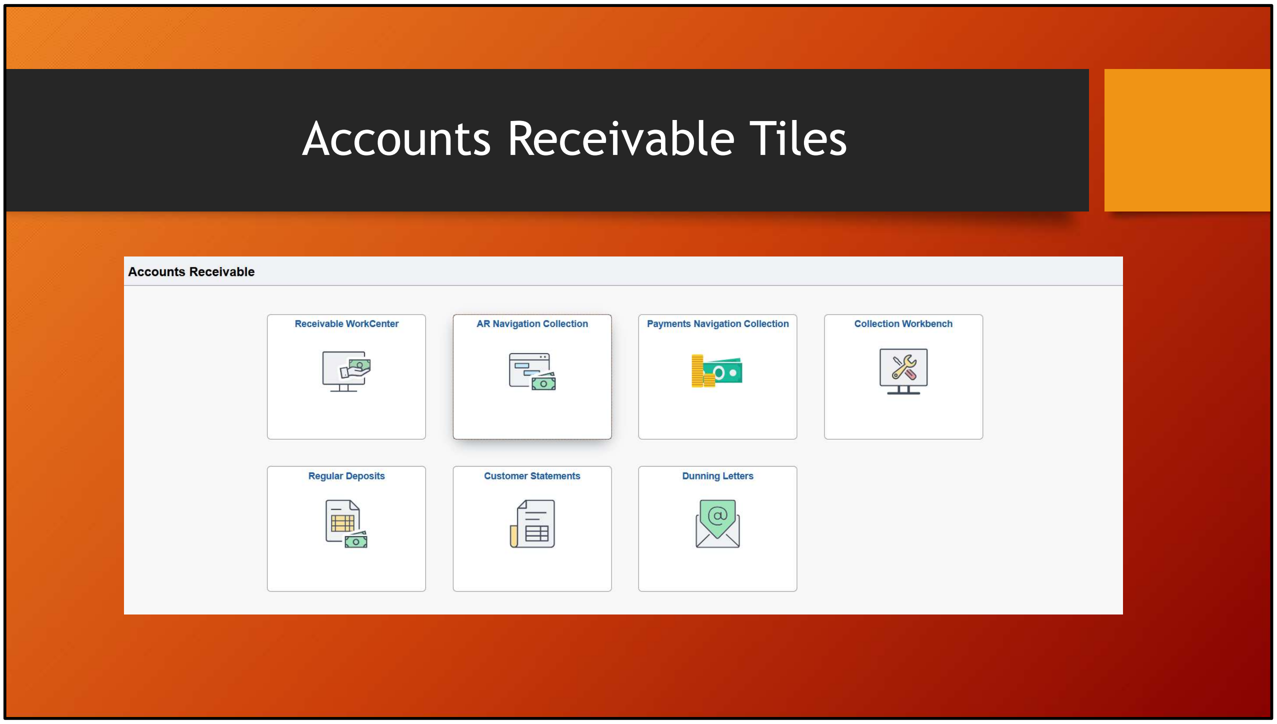


Accounts Receivable

- Presented by Chris Marchese (Core-CT AR/BI Lead)

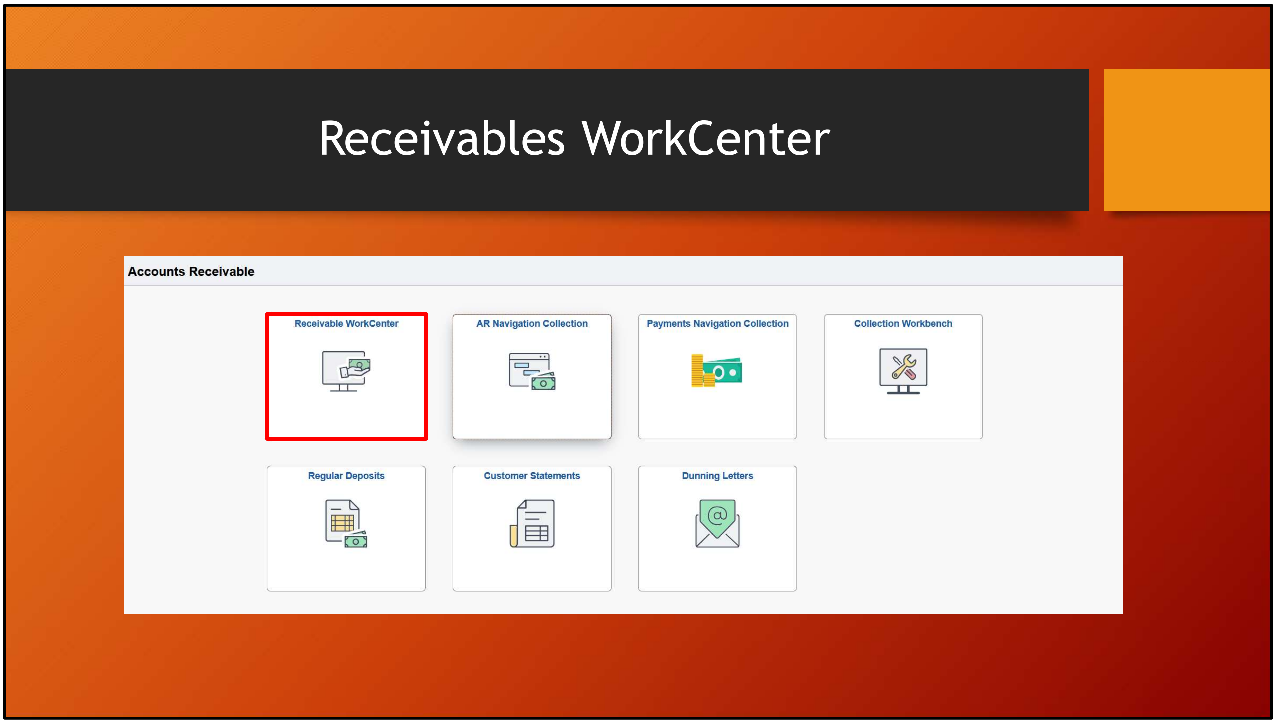
Accounts Receivable – Agenda

- Accounts Receivable Tiles
- Receivable WorkCenter
- AR Navigation Collection
- Payments Navigation Collection
- Collections Workbench
- Other Tiles
- New Functionality



Accounts Receivable Tiles

- One-Stop-Shop Type Tiles (Receivable WorkCenter & Collection Workbench)
- Navigation Collection Tiles (Brand New)
- Shortcuts to Common Functionality (Regular Deposit, Customer Statements, Dunning Letter)



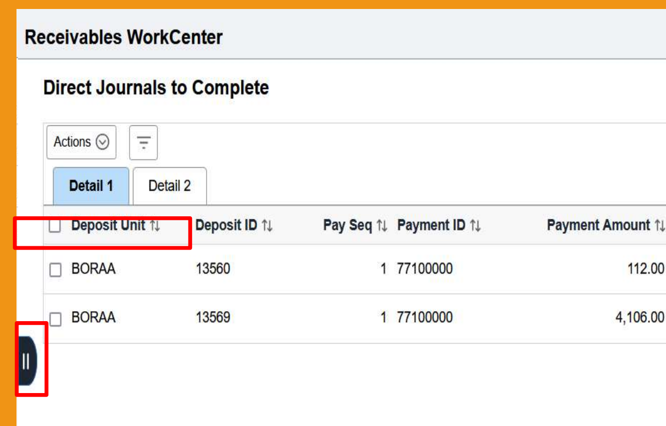
Receivable WorkCenter

- One-Stop-Shop to all your daily AR needs
- Existing functionality has been re-engineered to Fluid

Receivables WorkCenter

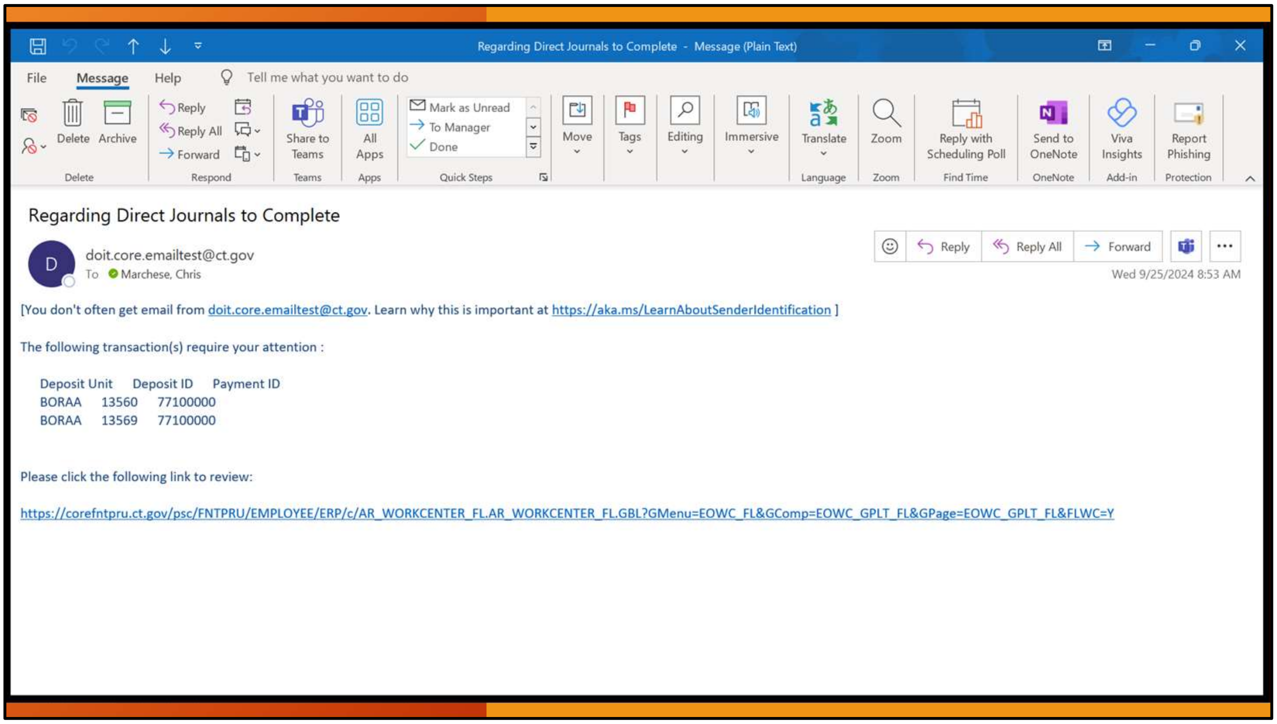
WorkCenters…

- Still have 4 Main Sections
  - My Work, Links, Queries, Reports/Processes
- Collapse & Expand with Left-Side Navigation
- Can Hide Navigation to Create More Workspace



Receivable WorkCenter

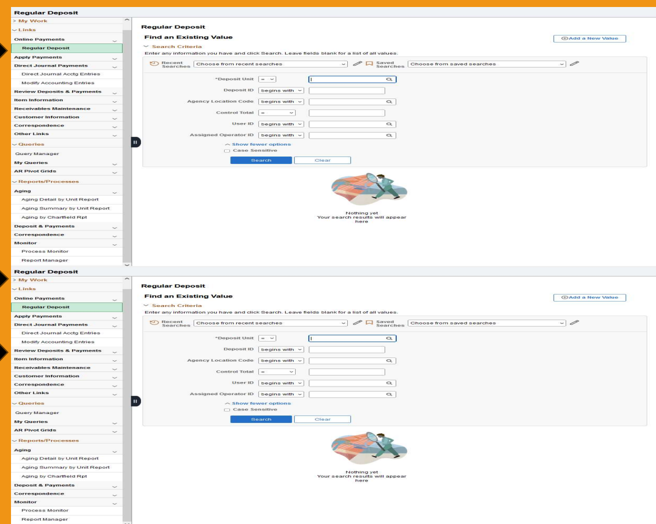
- 4 Main Sections all on Left-Side Navigation
- Sections & Sub-Sections can collapse and expand
- Hide/Show Left-Side Navigation



Receivables WorkCenter – My Work

- “Activate” My Work Links by setting up Filters
    - For AR, each My Work Link uses a different Filter
- NEW: Direct Journals to Complete My Work Link
    - Will display any Direct Journals where the Complete Checkbox is not marked
- “Actions” Drop-Down
    - Various actions can be performed depending on he My Work Link
    - “Email Notification” is a new Action Item

Receivables WorkCenter

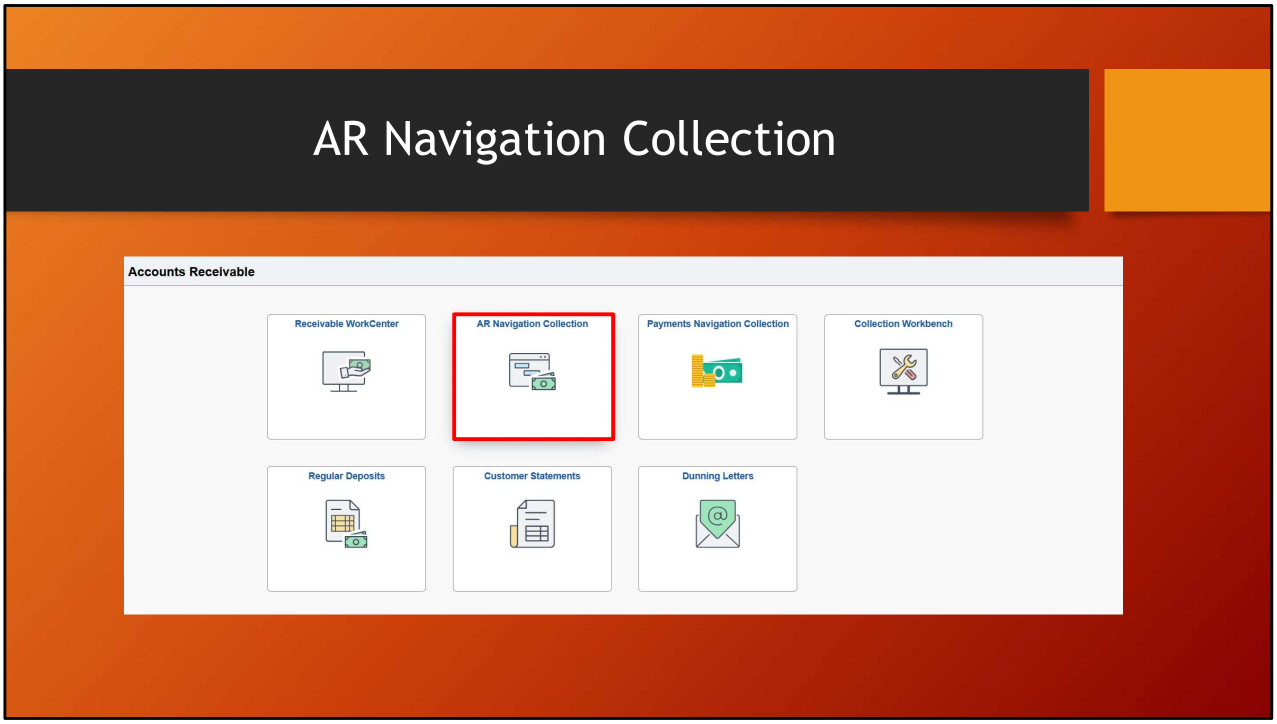


Links, Queries, Reports/Processes…

- Access to majority, if not all, of day-to-day navigational pages

Receivables WorkCenter – Links, Queries, Reports/Processes

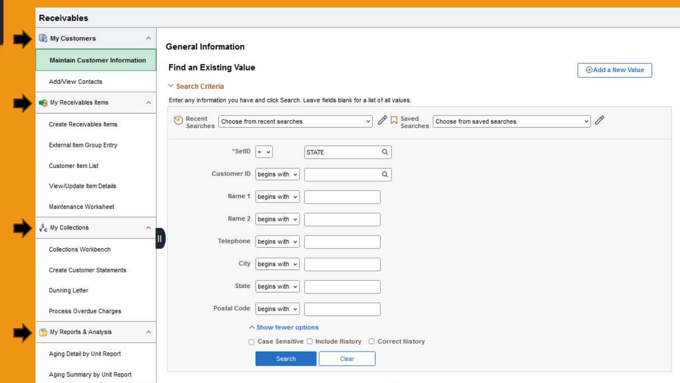
- These 3 sections should provide users with all their daily navigational pages



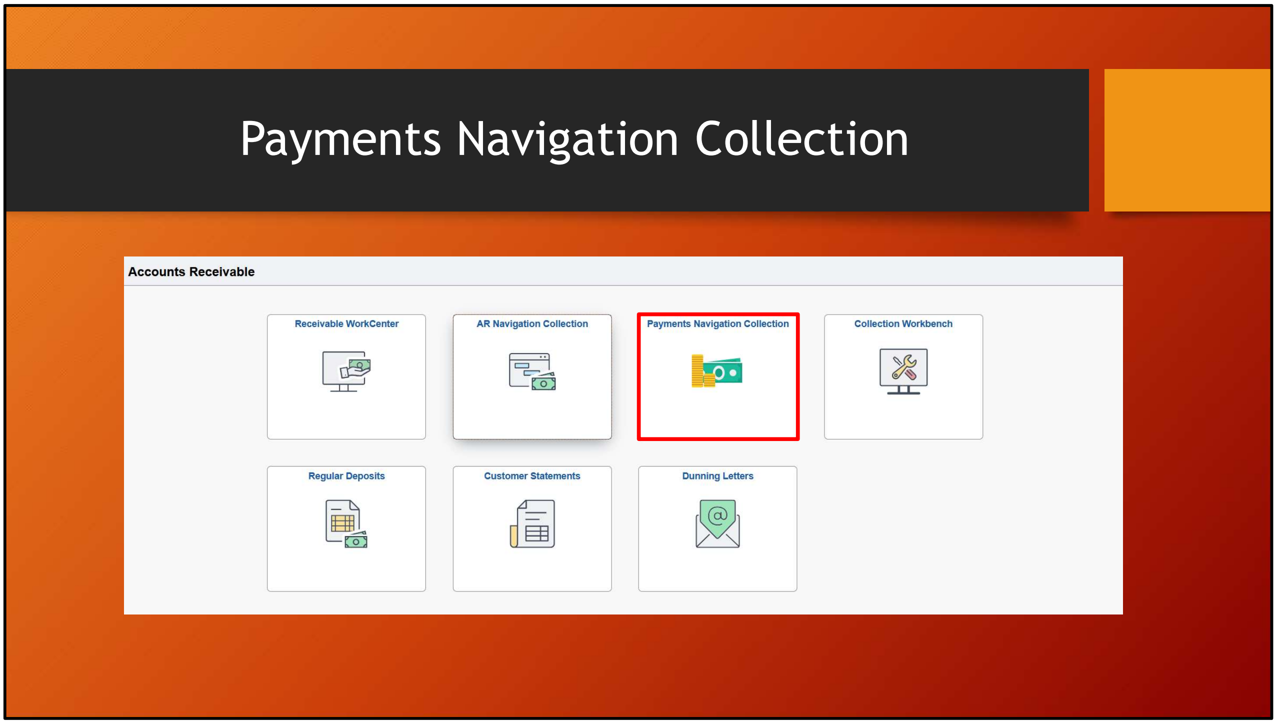
AR Navigation Collection
- New fluid-based tile that is Customer & Item-based

AR Navigation Collection

Customer and Item-Based
- My Customers
- My Receivable Items
- My Collections
- My Reports & Analysis



AR Navigation Collection
- Customer and Item-Based

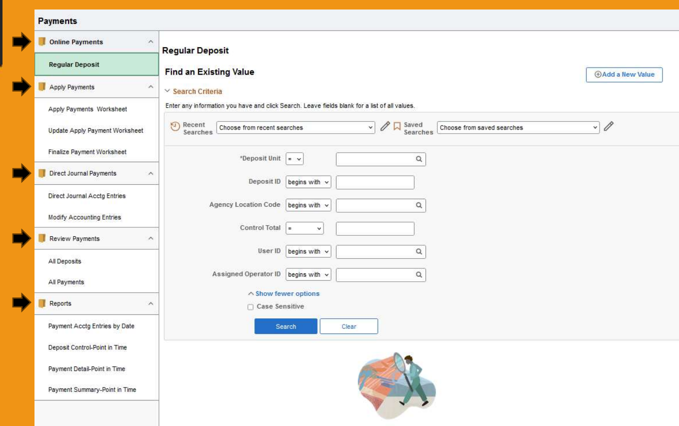


Payments Navigation Collection

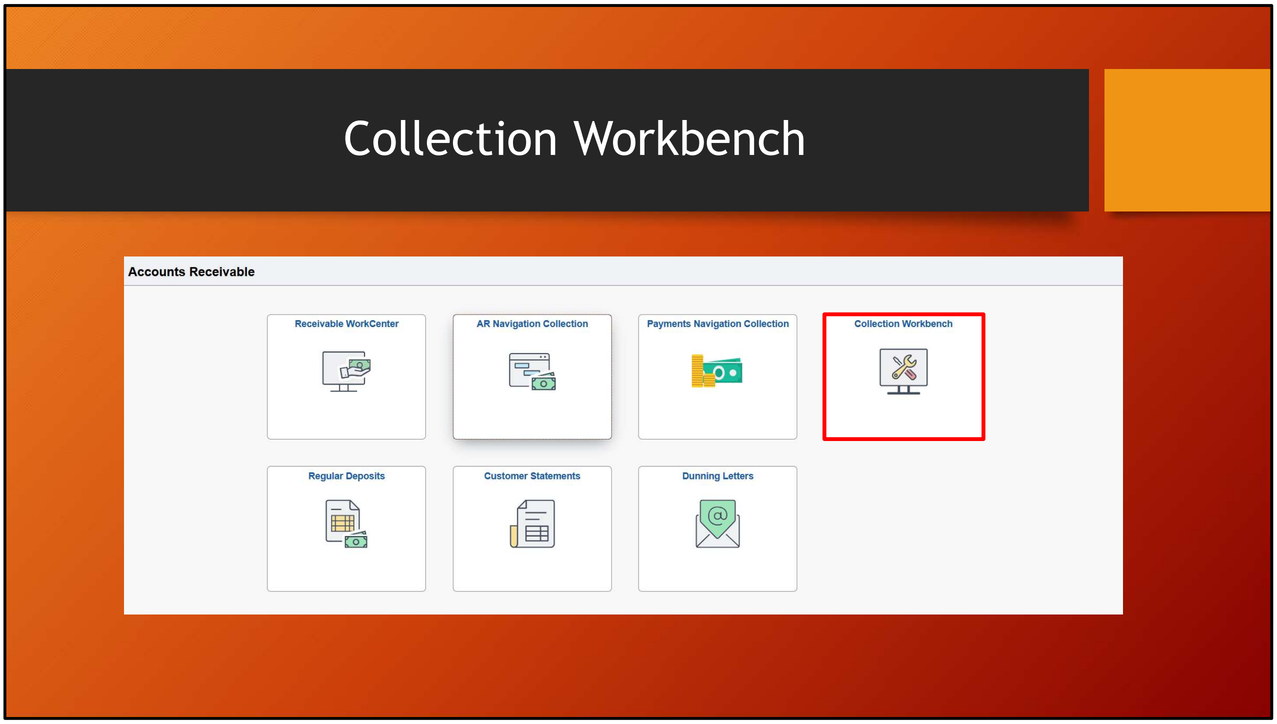
- New fluid-based tile that is Deposit & Payment-based

Payments Navigation Collection

Deposit & Payment-Based
- Online Payments
- Apply Payments
- Direct Journal Payments
- Review Payments
- Reports



Payment Navigation Collection
- Deposit and Payment-Based



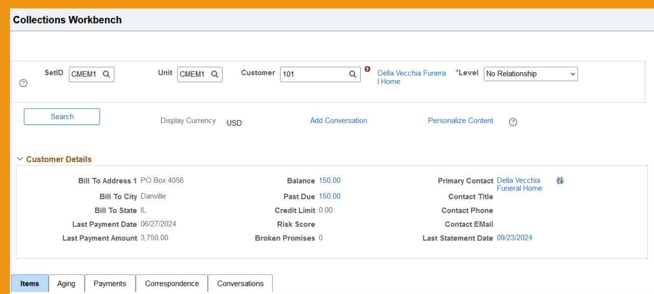
Collection Workbench

- One-Stop-Shop to all your Customer related AR information

Collections Workbench

Receivables Information For a Single Customer…

- Item Tab
- Aging Tab
- Payments Tab
- Correspondence Tab
- Conversations Tab



Collection Workbench

- Get various information for a single customer
    - Item, Aging, Payment, Correspondence & Conversations

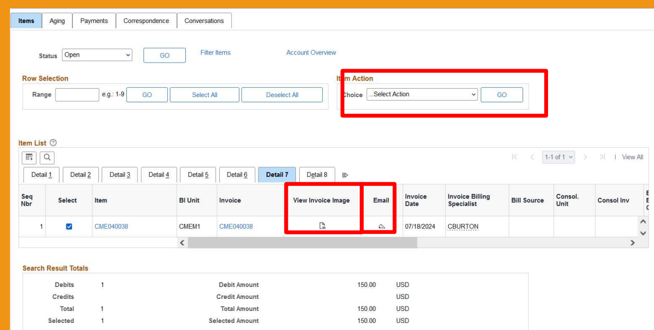
Collections Workbench Items Tab

On the Items Tab…

- View Open Item List
- Select an Item Action

On the Items Tab (Detail 7)

- View the Invoice Image
- Email an Invoice Directly

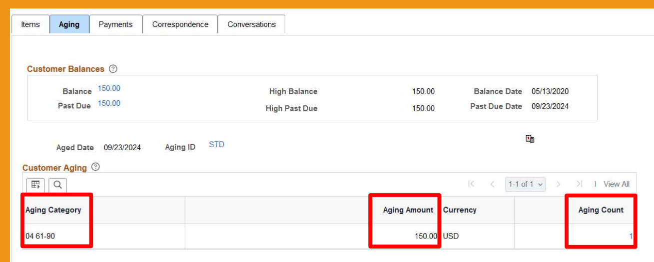


Collection Workbench – Item Information

Collections Workbench Aging Tab

On the Aging Tab…

- Summarizes the Aging Amount, and Aging Count, by Category

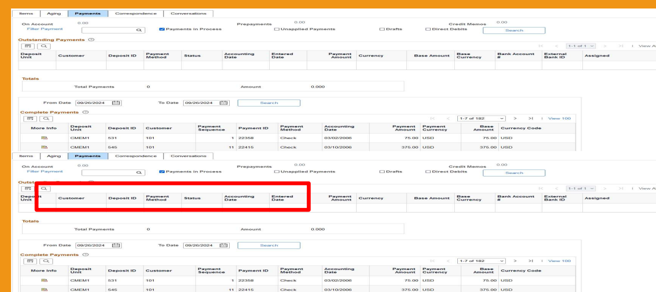


Collection Workbench – Aging Information

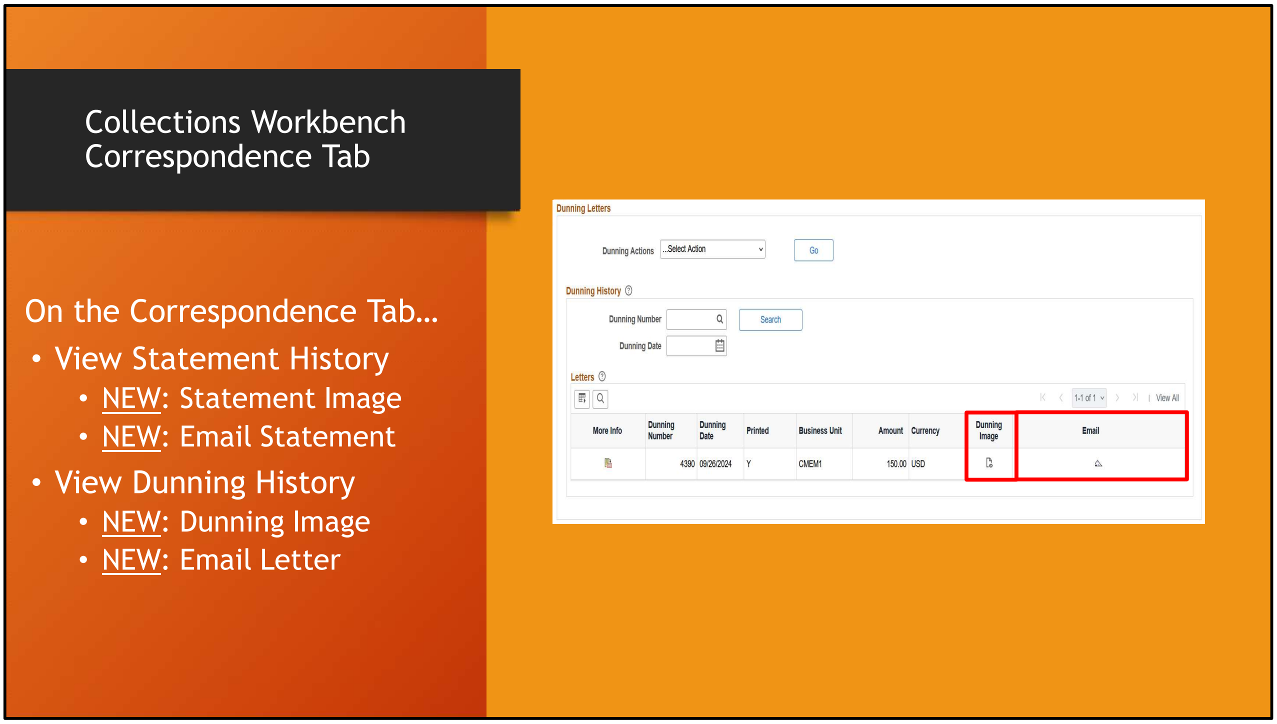
Collections Workbench Payments Tab

On the Payments Tab…

- View Payment Information
  - Outstanding Payments
  - Completed Payments
- Search Completed Payments by a Date Range



Collection Workbench – Payment Information



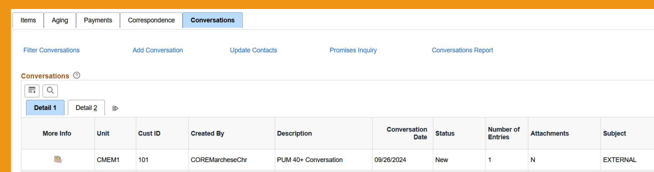
Collection Workbench - Correspondence Information

- Statements
- Dunning Letters

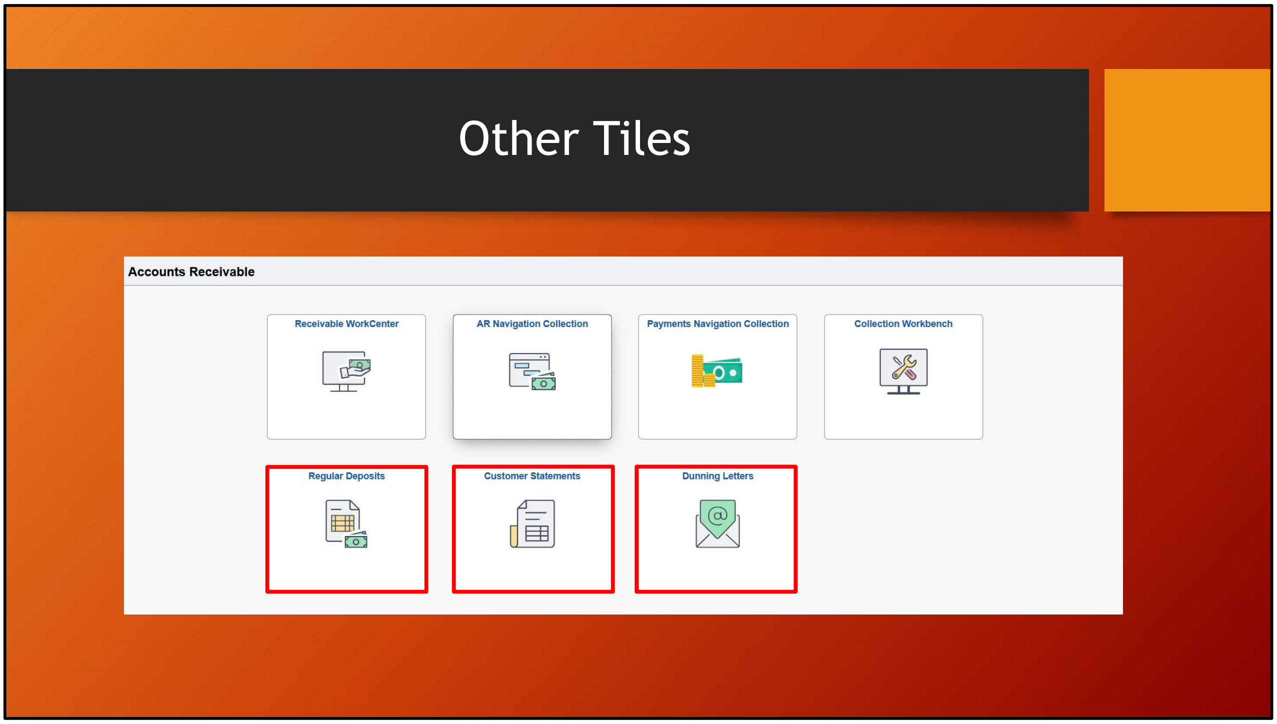
Collections Workbench Conversations Tab

On the Conversations Tab…

- View/Add Customer Conversations

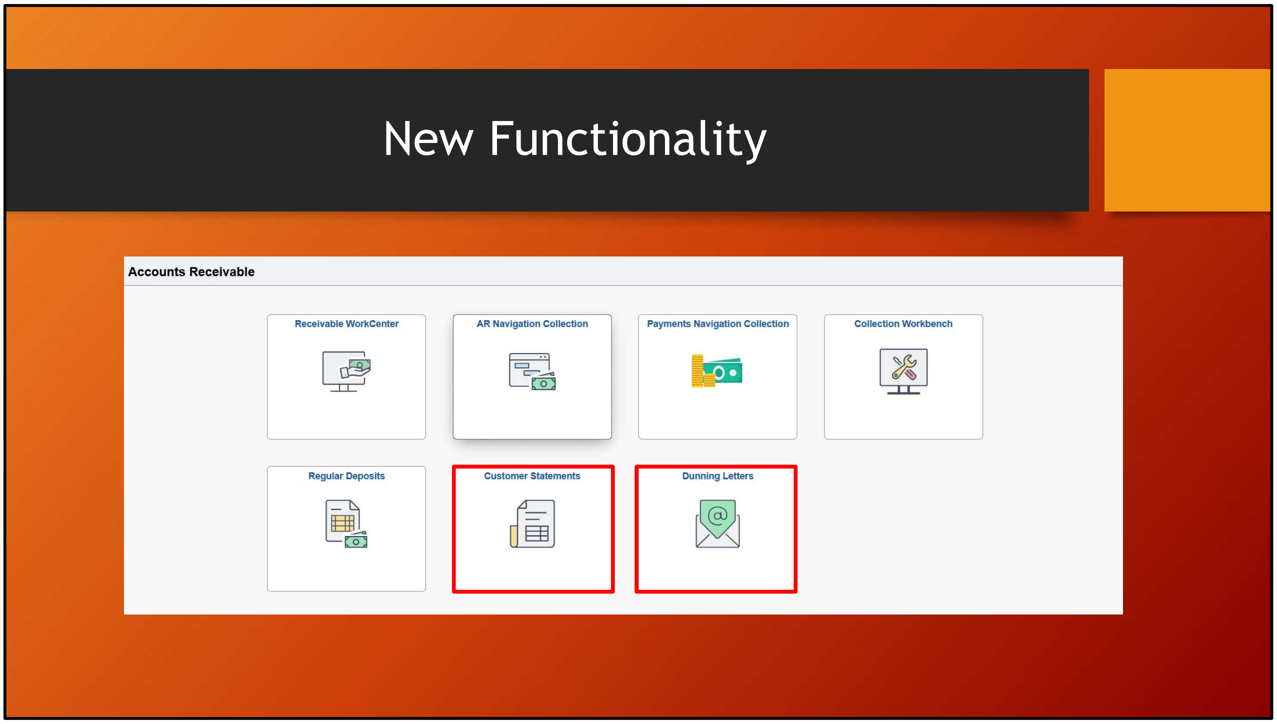


Collection Workbench – Conversation Information



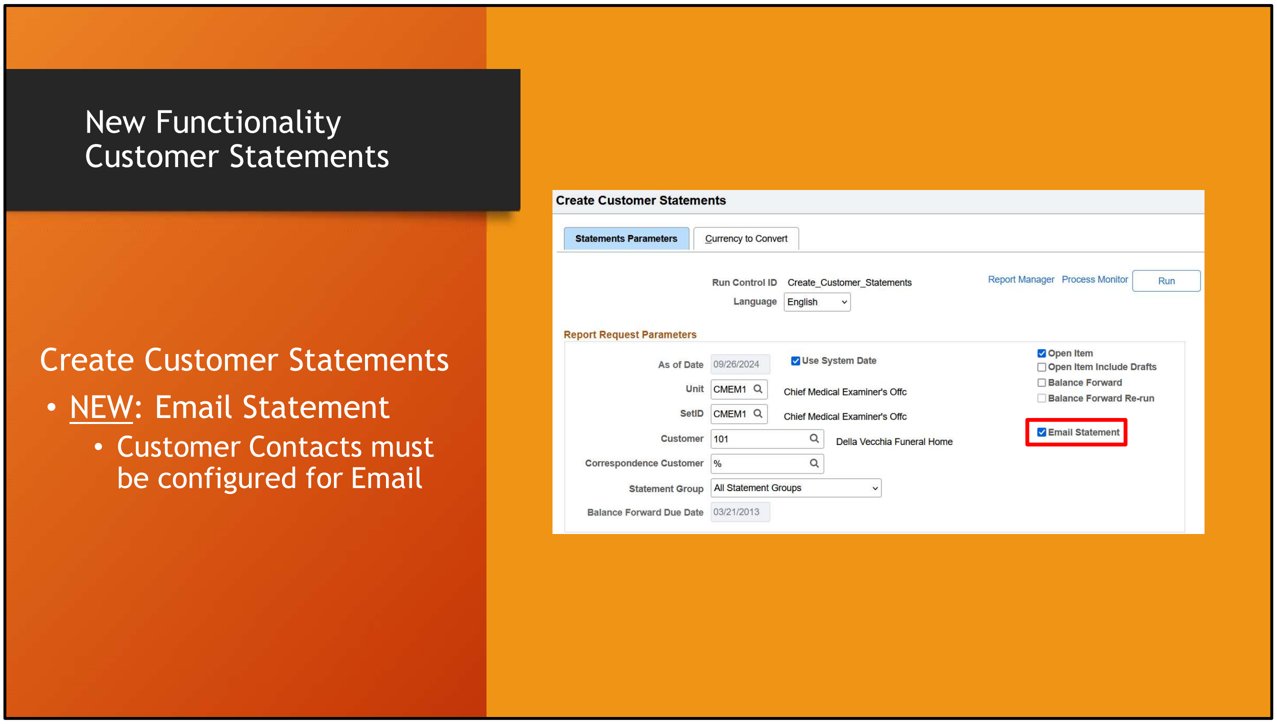
Other Tiles

- Shortcuts to Regular Deposits (Pick List), Customer Statements, and Dunning Letters



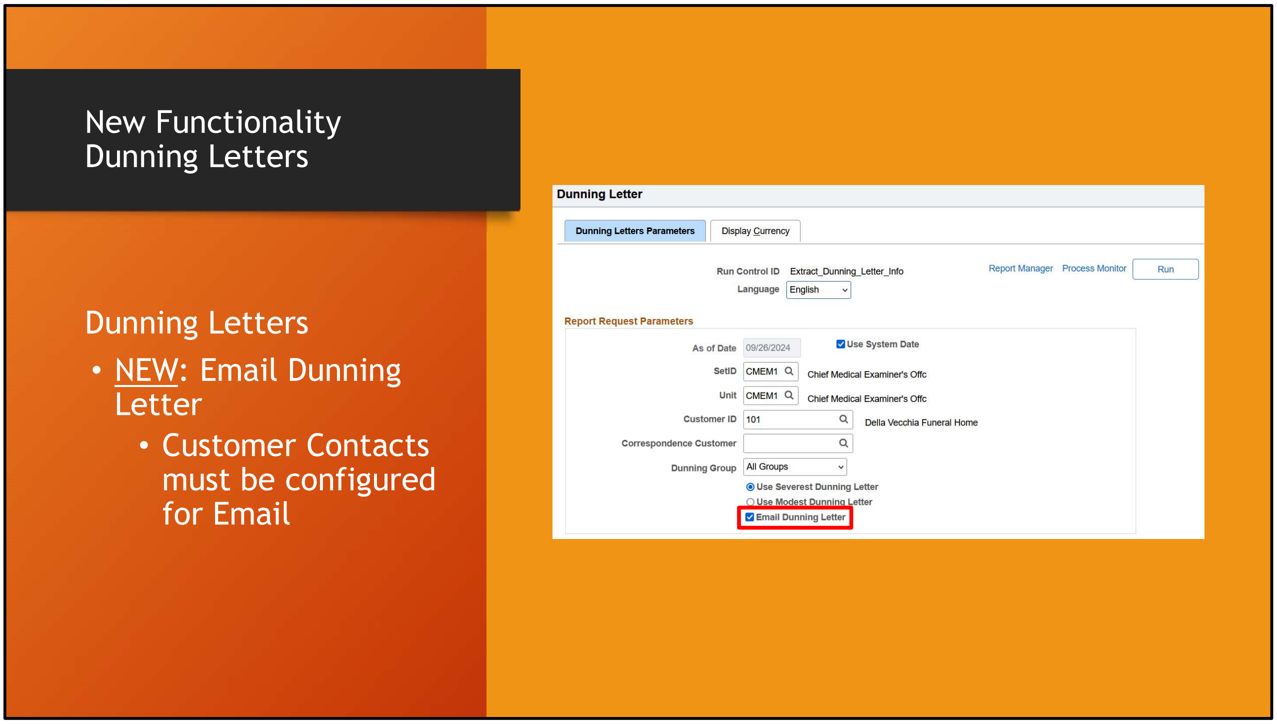
New Functionality

- Customer Statements & Dunning Letters can now be emailed



New Functionality – Customer Statements

- Select the Email Statement checkbox
    - Assumption is that Customer Contact is configured for Emailing



New Functionality – Dunning Letters

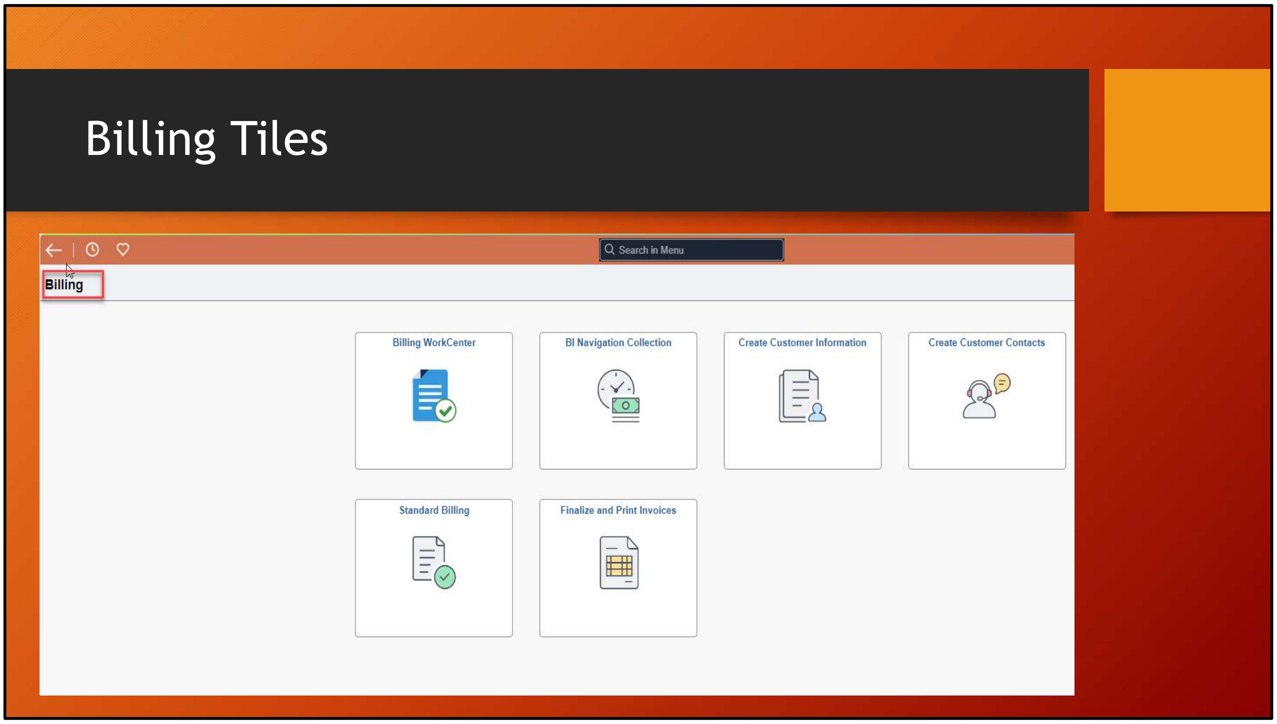
- Select the Email Dunning Letter checkbox
    - Assumption is that Customer Contact is configured for Emailing

My name is Agnieszka (Agnes) Kowalewska.
In Core-CT Financials Team I work with Chris Marchese and take care of Accounts Receivable, Billing and Banking modules.

Billing Agenda

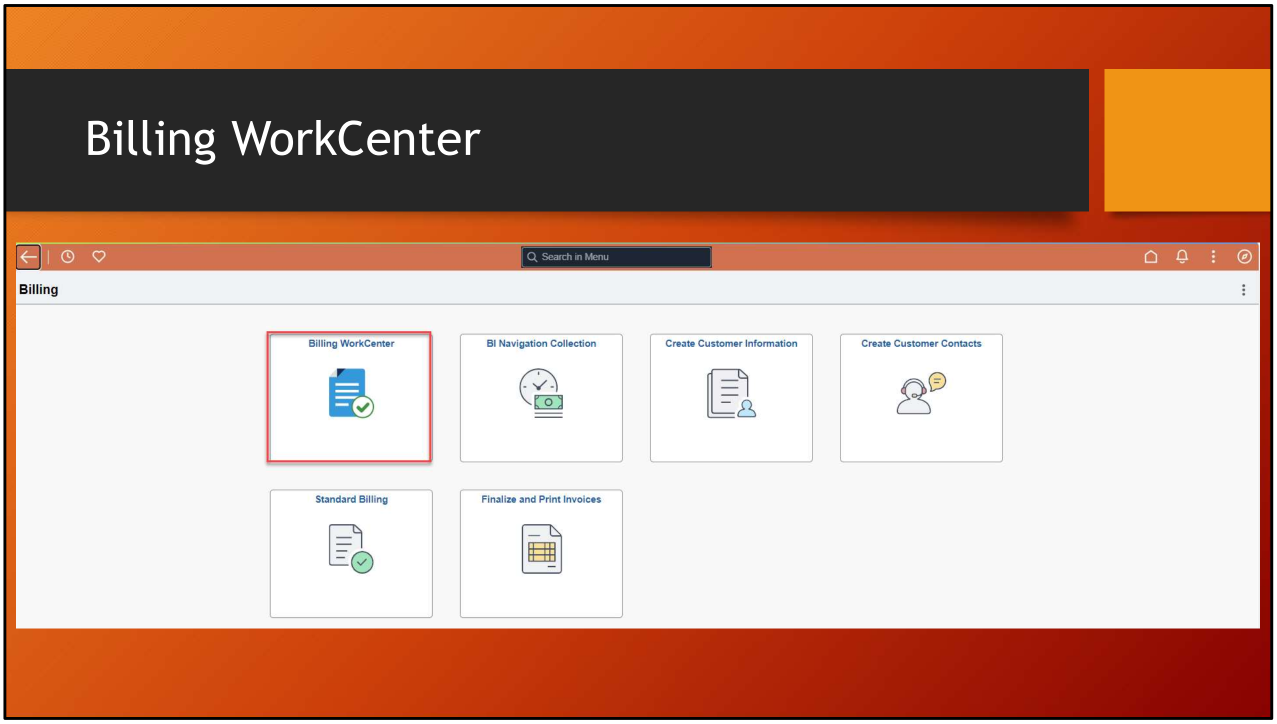
- Billing Tiles
- Billing WorkCenter
  - Filter Set-up
  - Editing the Filter
  - Place to go for your Processes
  - Sections
  - Other Links Section
  - My Processes Section
- Billing Navigation Collection
- Other Billing Tiles
- New Functionality – Copy Single Bill
- Customer Contacts for Paperless Invoicing
- Month-end e-mail reminders
- Billing Interfaces

Welcome to the Billing section. Today I will cover the newest changes along with new functionality in Billing.
I will start off with Billing Tiles called a Billing Dashboard, review of the Billing WorkCenter and Billing Navigation Collection.
Then I will move to Other Billing Tiles and a new functionality in Copy Single Bill.
And I end with Customer Contracts for Paperless Invoicing, month-end e-mail reminders, I am guessing your favorite, and information about Billing Interfaces.



This is a Billing Dashboard with six tiles:

- First two tiles are one-stop-shop type tiles where CORE-CT Billing users will have access to most frequently used pages and these are: Billing WorkCenter and Billing Navigation Collection.
- Billing Navigation Collection is a brand new tile, we don't have it today in our current CORE-CT.
- Next four Billing tiles are shortcuts to common functionality and these are:
    - Create Customer Information,
    - Create Customer Contacts,
    - Standard Billing,
    - and Finalize and Print Invoices.



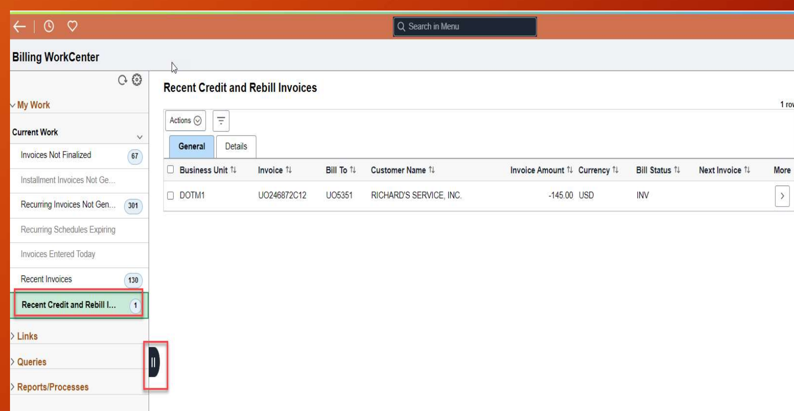
Billing WorkCenter tile is:

- A one-stop place to all daily/ weekly Billing needs for Billing Users.
- Existing functionality has been re-engineered to Fluid.
- Billing WorkCenter was set-up this way that most of daily and weekly Billing processes could be done from here without a need to navigate to individual CORE-CT pages.
- Billing WorkCenter gives users quick access and provides an overview and status status of some Billing transactions.

Billing WorkCenter

Billing WorkCenter

- Still have 4 Main Sections
  - My Work, Links, Queries, Reports/Processes
- Collapse & Expand with Left-Side Navigation
- Users can hide Navigation to Create More Workspace



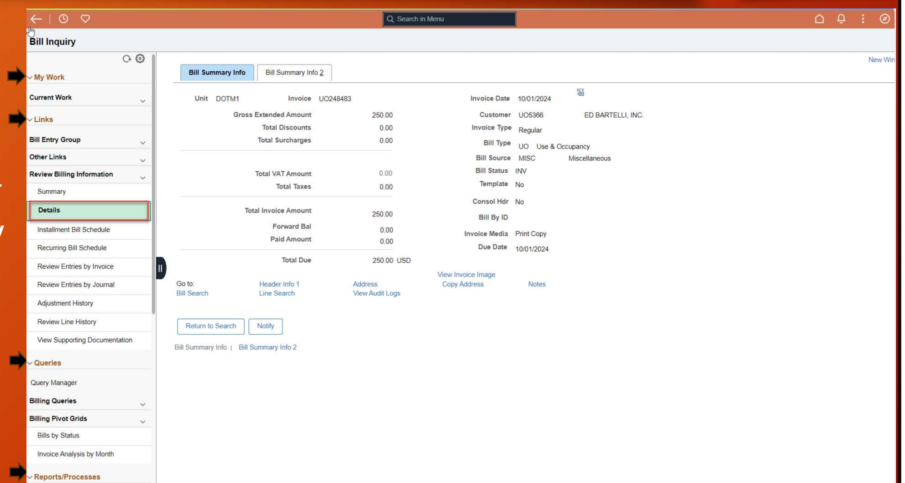
Billing WorkCenter

- We still have 4 Main Sections all on the Left-Side Navigation: My Work, Links, Queries, Reports & Processes.
- Sections & Sub-Sections can collapse and expand.
- CORE User can Hide/Show Left-Side navigation to create more workspace.

Billing WorkCenter

Links, Queries, Reports/Processes…

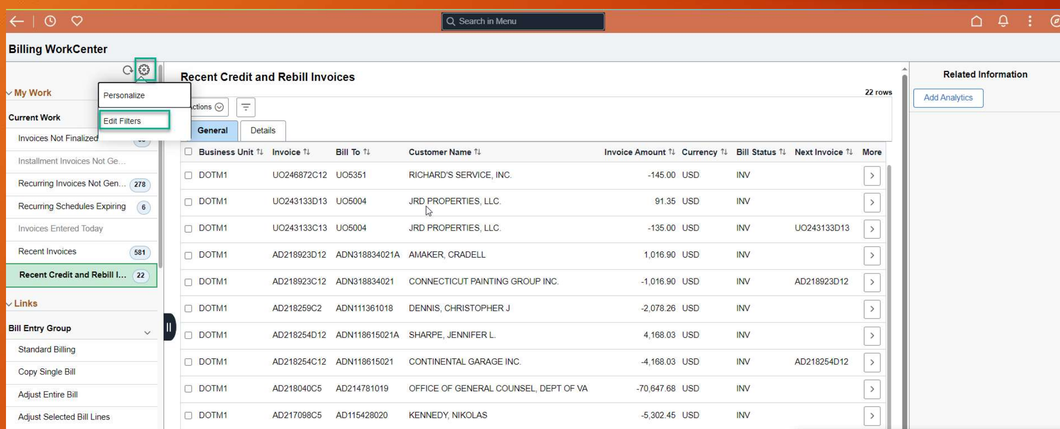
- Access to majority, if not all, of day-to-day navigational pages



We are continuing with Billing WorkCenter:

- These 4 sections (My Work, Links, Queries, Reports/Processes) should provide users with most if not all their daily navigation pages,
- They give users access to their daily/ or weekly most frequent Billing processes and transactions.

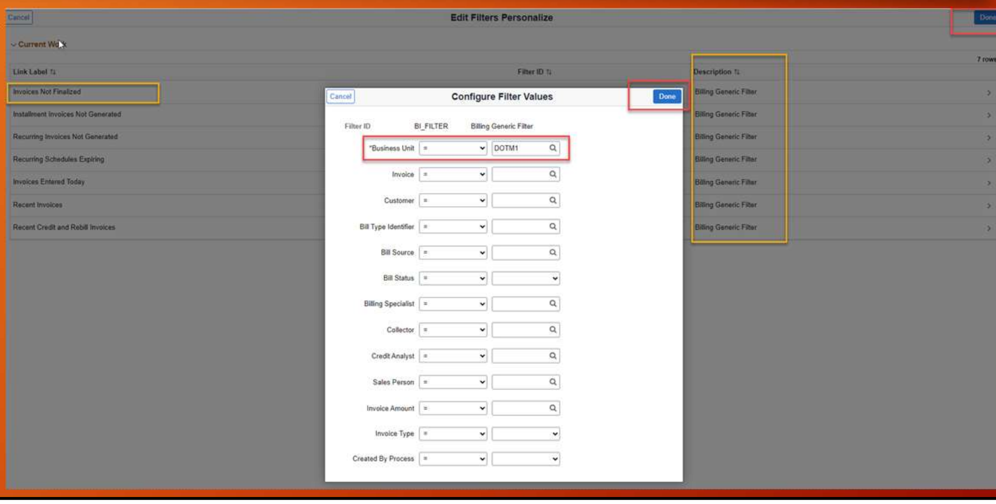
Billing WorkCenter – Filter Set-up



Before you start working with Billing module, each CORE User needs to set-up a filter in the Billing Work Center, so proper transactions are being displayed in the reports in the +Current Work Section.

There is a Personalize button at the left upper corner on the Billing WorkCenter page, highlighted in green.
CORE User needs to choose Edit Filters -> choose Business Unit or multiple Business Units he/ she has access to and click “Done” twice, which is presented on the next slide.

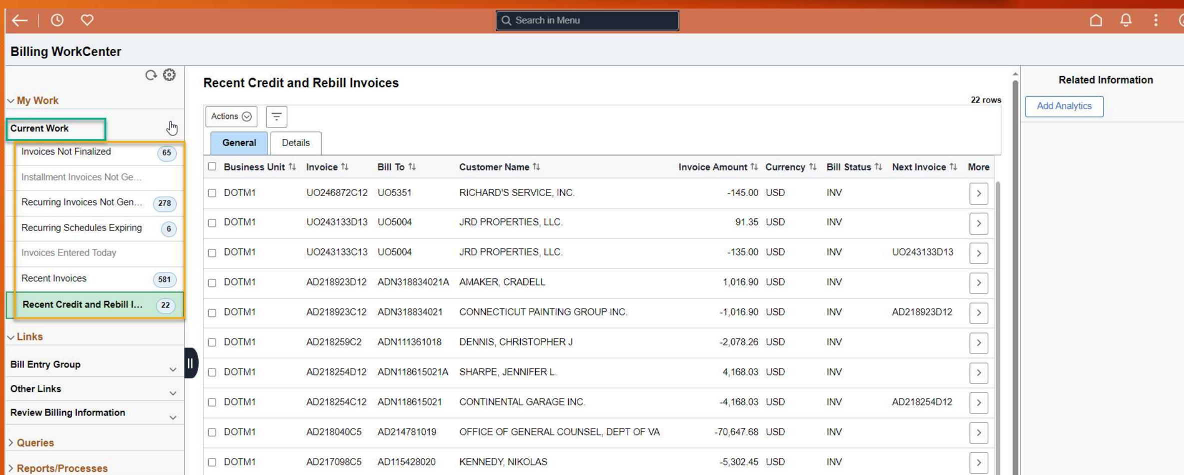
Billing WorkCenter – Editing the Filter



If a CORE User has access to multiple Business Units instead of one Business Unit only, when setting up the filter the operator ‘in’ should be used.
User can edit Billing WorkCenter filters as many times as needed and adjust them according to the needs.

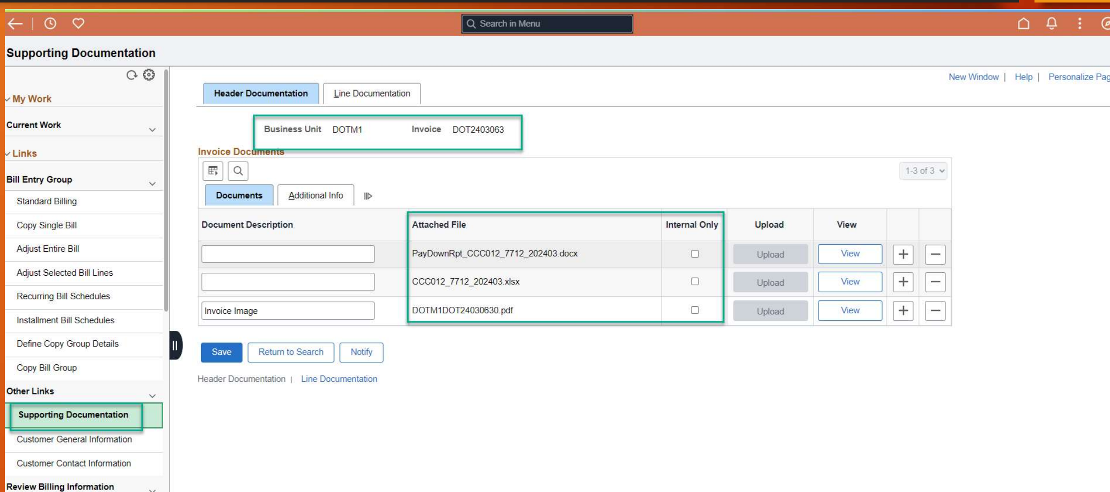
Very important information is: on the page (Edit Filters Personalize) you can see that there are seven reports/ links in this section called Current Work in Billing WorkCenter.
All links require filters to be set-up.
A good news is that CORE user needs to set-up Billing filter for the 1st link – here it is Invoices Not Finalized highlighted in yellow. Once filter is set-up for the first Link/ Report it will be applied to all seven.

Billing WorkCenter - Sections



Summarizing: Billing WorkCenter is one place to go for your daily Billing processes and status of your transactions.
It is to be used instead of navigating manually to individual Billing CORE pages.

Billing WorkCenter – Other Links Section

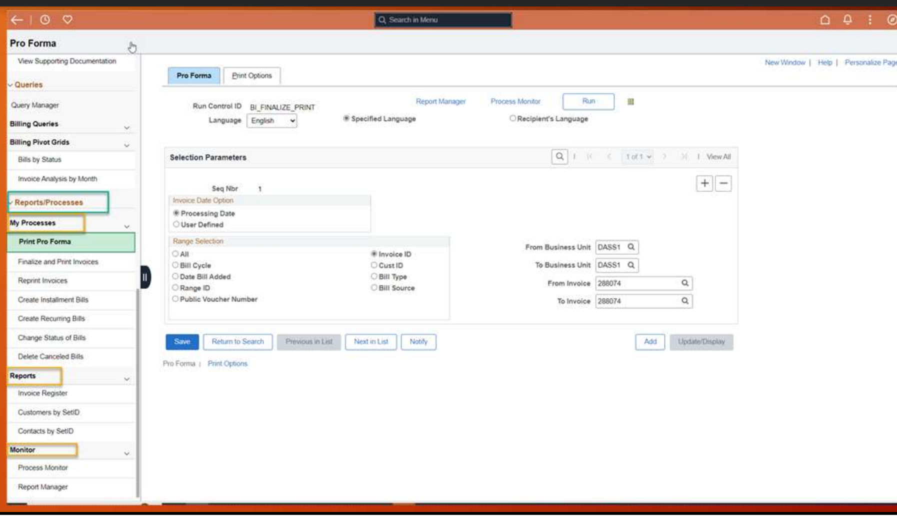


In Other Link Section in the Billing WorkCenter Users will see access to Supporting Documentation as well as Customer General Information (a page where we create a Customer) and Customer Contact Information (where we can assign an e-mail address for a Customer).

Supporting Documentation page applies to an invoice and it allows a Billing module User to:

- Review supporting documents and also
- View/ Add and Delete them if needed.

Billing WorkCenter – My Processes Section



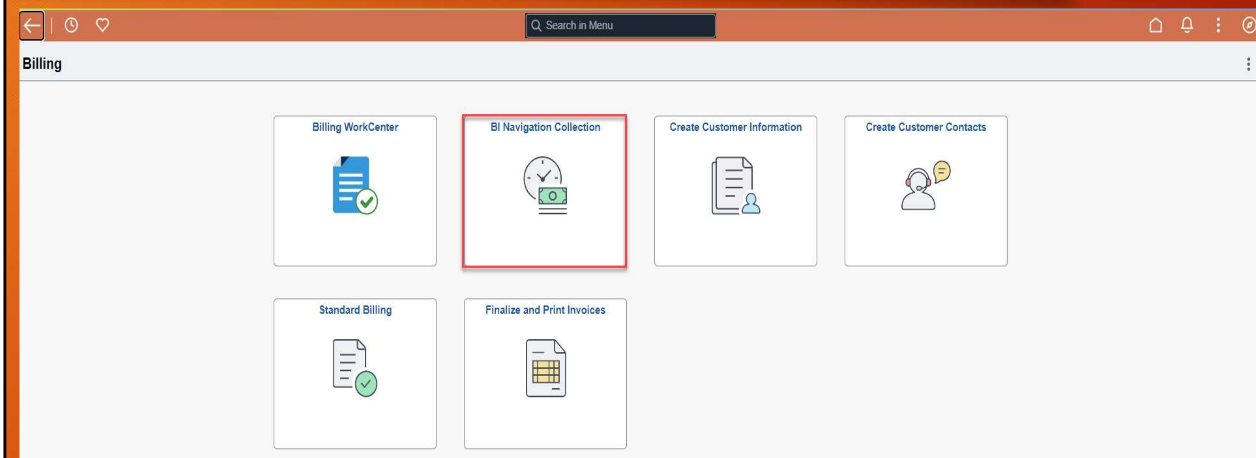
In Reports/ Processes Section of the Billing WorkCenter there is access to most frequently Billing Processes and Reports used.

Example provided on this slide is a Print Pro-Forma invoice page. This is probably a page that most of you with access to Billing module use weekly if not daily.

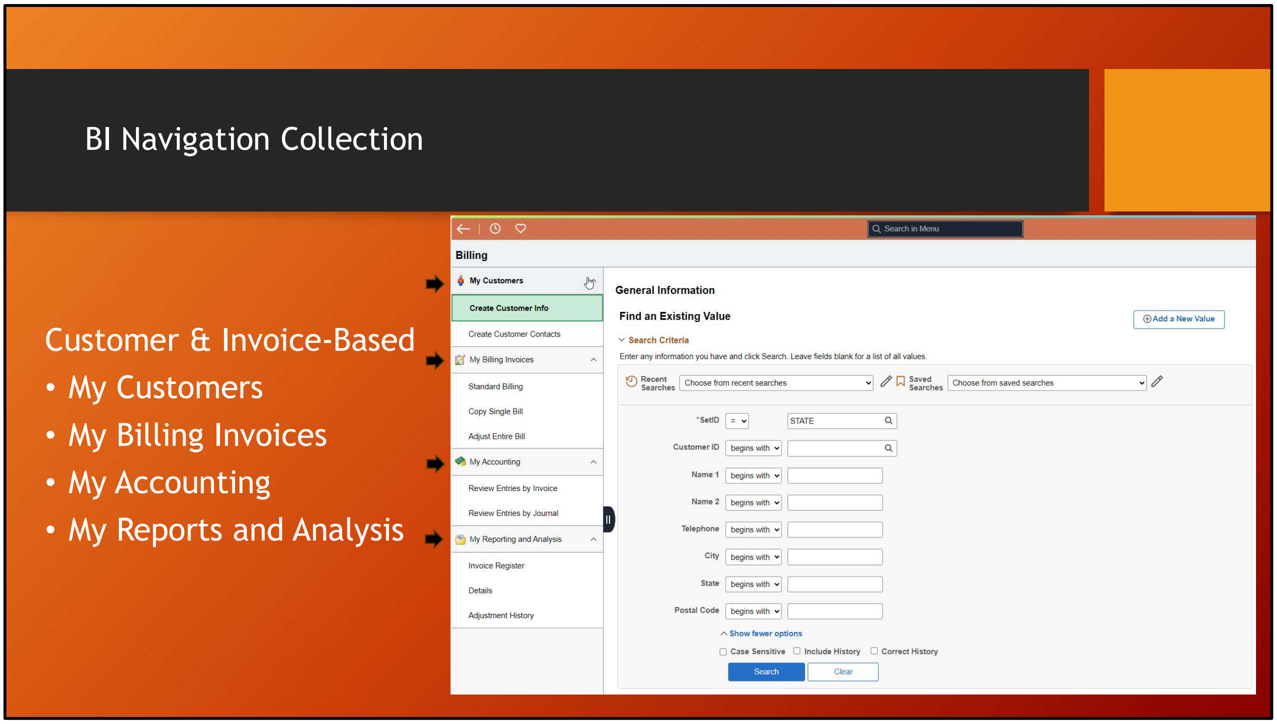
Under My Processes CORE Users will also have access to other frequent Billing processes as the following:

- Finalize & Print Invoices,
- Reprint Invoices,
- Create Installment Bills,
- Create Recurring Bills,
- Change Status of Bills and
- Delete Cancelled Bills.

BI Navigation Collection

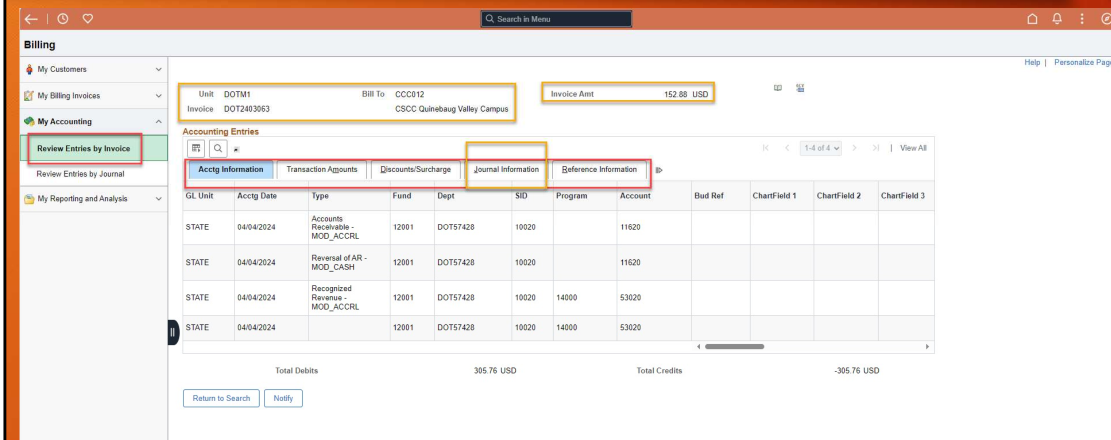


Billing Navigation Collection Tile is a brand new tile in Billing.

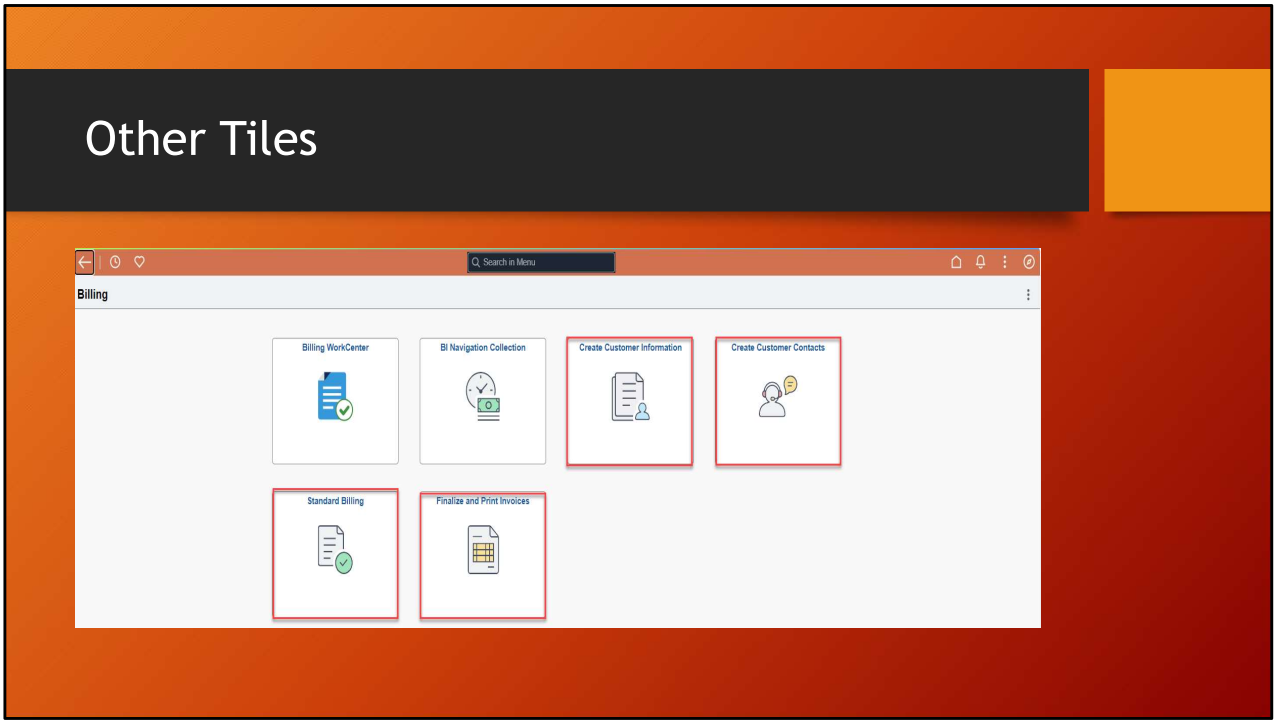


Billing Navigation Collection is a Customer and Invoice-Based Tile grouping the most frequent processes for a Customer and invoices.
It has 4 Sections: My Customers, My Billing Invoices, My Accounting and My Reports & Analysis.

BI Navigation Collection



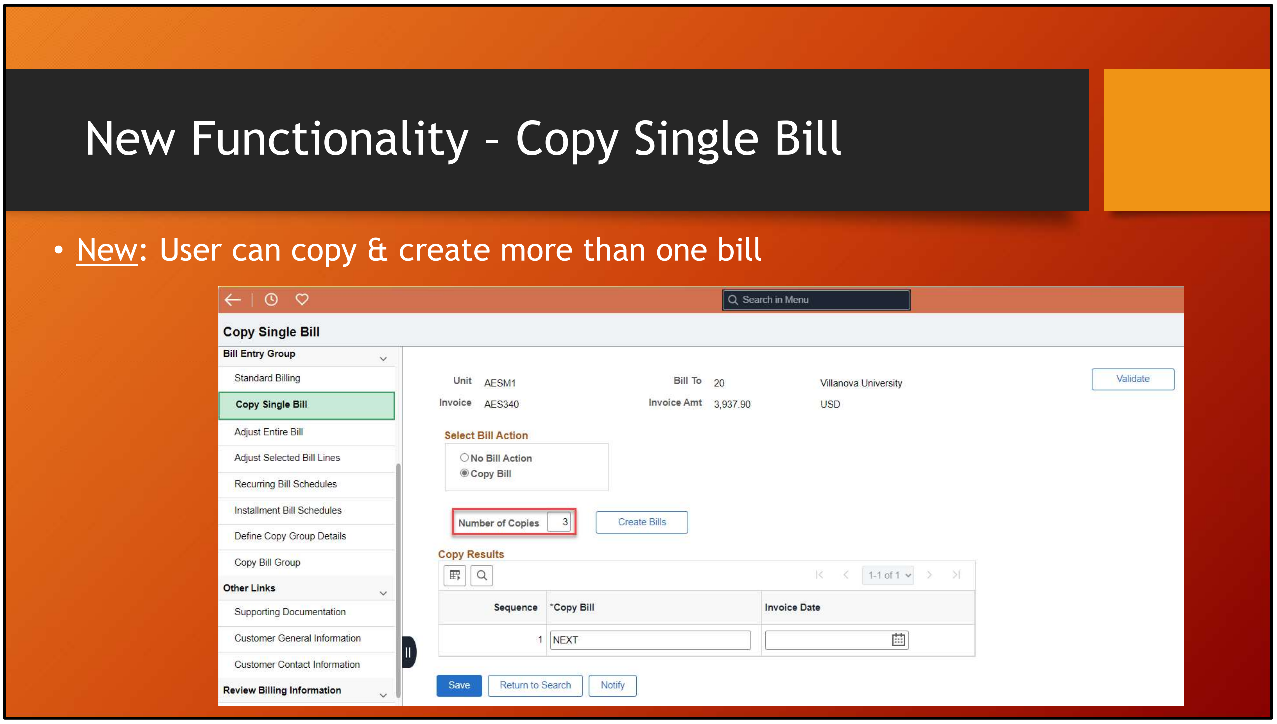
I am presenting the example of the report in Billing Navigation Collection Tile in My Accounting Section – it is Review Entries by Invoice.
As you can see this page/ report has few sub-pages/ tabs where user can see different information about any chosen invoice.



Other Billing module Tiles – most popular and frequently used by CORE Billing users.

These other four Billing tiles are shortcuts to:

- Create Customer Information (to create or edit existing Customers),
- Create Customer Contacts (for paperless billing),
- Standard Billing where we create invoices,
- and Finalize and Print Invoices where you finalize an invoice/ or multiple invoices.



With the current upgrade there is a new functionality implemented in Copy Single Invoice. This new functionality allows Users to create more than one copy of the bill. Currently you are able to create one copy at a time and in upgraded CORE you will be able to create multiple bills as a copy of one existing bill.

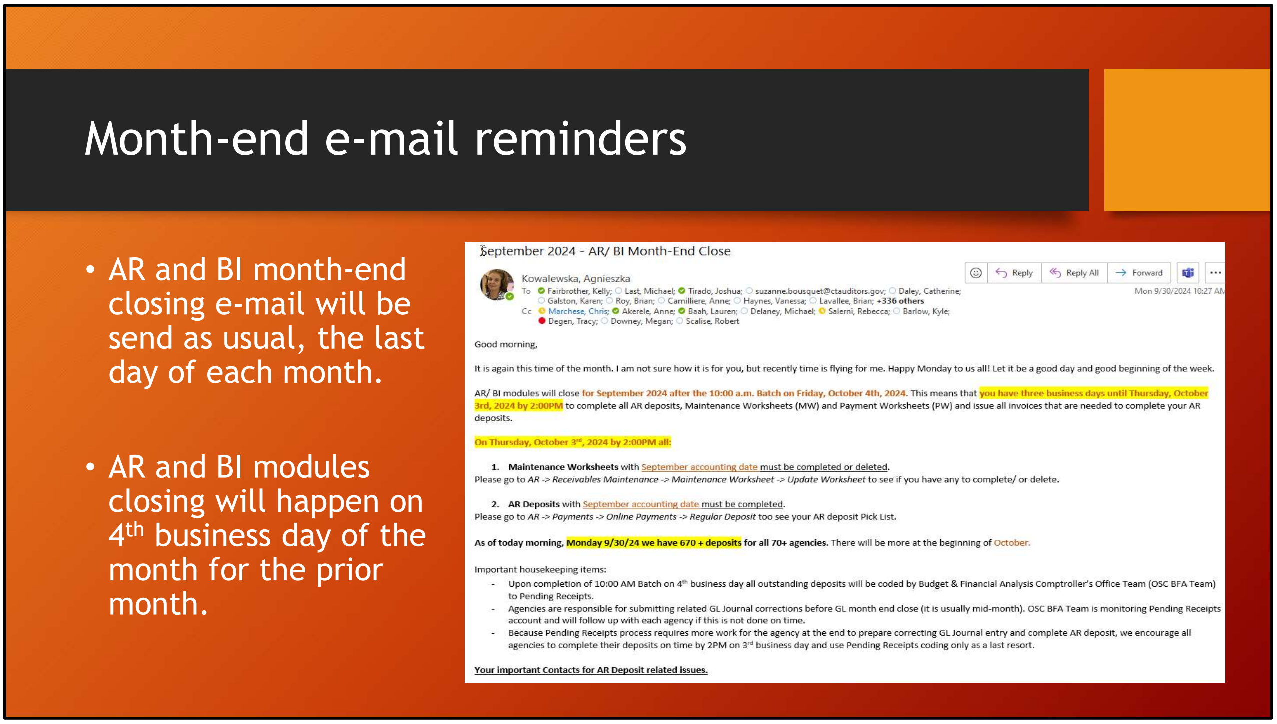
Steps to Copy Single Bill (as presented on the slide):

a) A User selects Copy Bill,
b) then selects Number of Copies required,
c) After this is done it SAVEs to proceed and create copy/ or multiple copies of the given invoice.

This is a reminder about already existing functionality for Billing module. It is not new functionality, but existing one.
It is tying Customer Contact to existing Customer ID.
This allows agency to send invoices via e-mail to its Customers when Customer Contact is set-up and e-mail is entered.

On this slide to the right: Maintain Contacts you have a place where Customer address can be set-up.

Additionally, the new functionality that Chris spoke about like sending Customer Statements and Dunning Letters via e-mail that is available in upgraded CORE also requires Customer Contacts set-up.



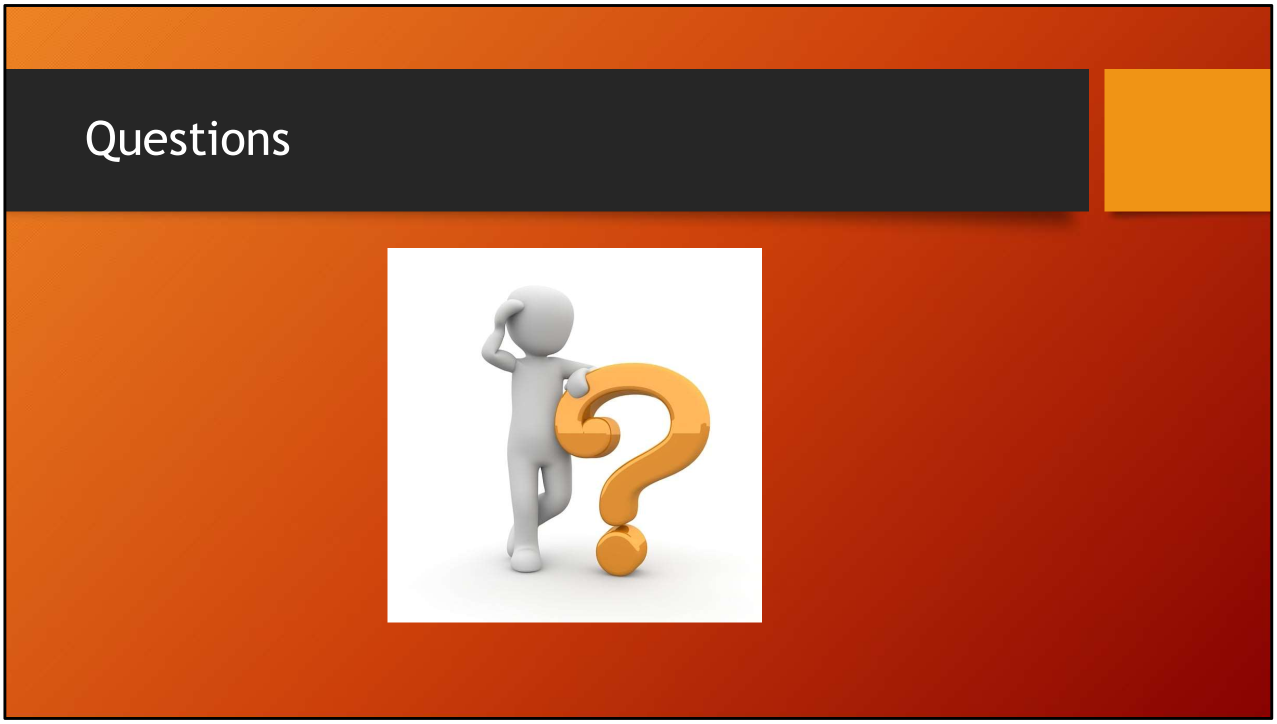
I am sure these are your favorite e-mails or one of the most favorite :). AR and BI …. (as on the slide).

Billing Interfaces

- Billing Interfaces will work as usual.
- Key-Agency Contacts will be notified via e-mail if there are issues to be resolved and their input/ or action is required.
- Agencies with existing Billing Interfaces:
  - BORCC - CT State Community College system
  - CMEM1 - Chief Medical Examiner's Office
  - DASM1/ DASS1 - Department of Administrative Services
  - DOTM1 - Department of Transportation
  - DPHM1 - Department of Public Health and
  - DPSM1 - Department of Emergency Services & Public Protection

We received few questions from various agencies whether there are any changes to Billing interfaces and how it will work in upgraded CORE.

Billing interfaces will work ask usual, there are no changes to the process for agencies and us in CORE Team.



This brings us to any questions you might have for the Billing module.
I will hand the presentation over to Jim Klaben who will talk about the GL module.

Break

General Ledger

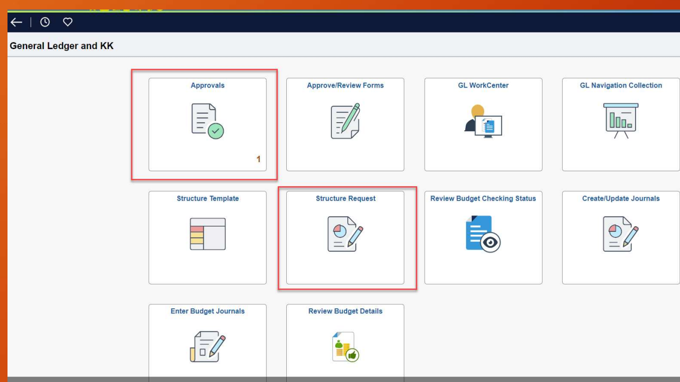
James Klaben

GL Agenda

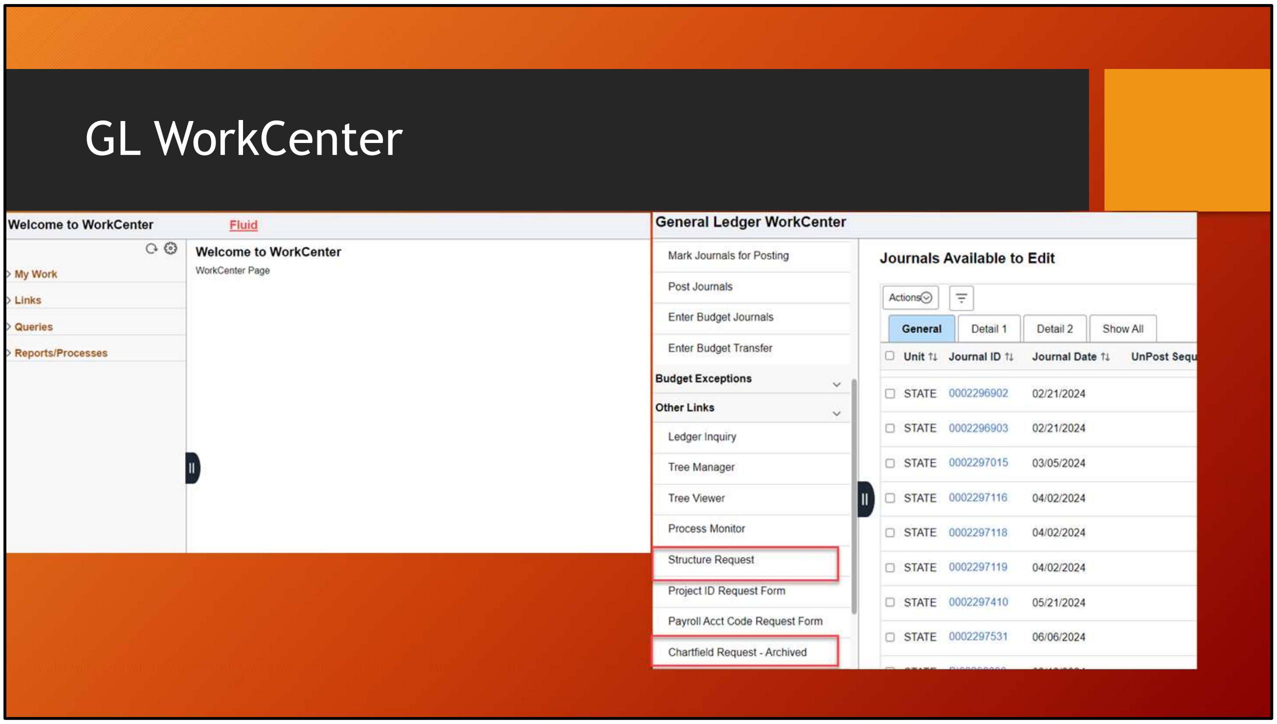
- GL Dashboard
- WorkCenter
- Structure Requests
- Approvals
- Approval/Deny - Notifications
- New Chartfield Value – Chartfield 3

The slide gives an overview of topics covered for GL

GL Dashboard



-General Ledger and KK Dashboard contains some of the most used areas including GL WorkCenter and GL Navigation Collection
-There are features that are new for this upgrade which include the “Approvals” and “Structure Requests” tiles
-These tiles will bring you to new pages which are covered in the following slids

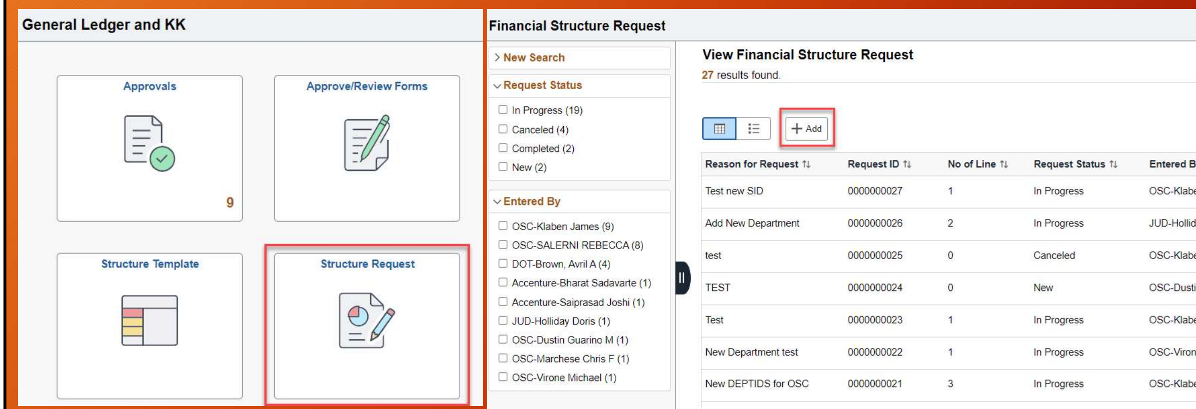


-A brief over of the new GL WorkCenter format.
-Same menu options but different format.
-Note the Structure Request link. This will bring you to the new Strucure Request page.
-Chartfield Request inquiry is archived but still visible. This will show all historical Chartfield Requests.

Structure Requests

- Old Chartfield Request process no longer supported. Pages will be archived to store historical request information.
- Structure Request supports new fluid layout.
- The same information is needed in order to submit a request but in a new format.
- Approvals are processed through Approval tile on GL/KK dashboard.
- Same notifications are received as with Chartfield Request via email and in the system.
- Any current Chartfield Requests in queue need to be completed by November 25. Any new requests after the 25th need to be submitted as Structure Requests.

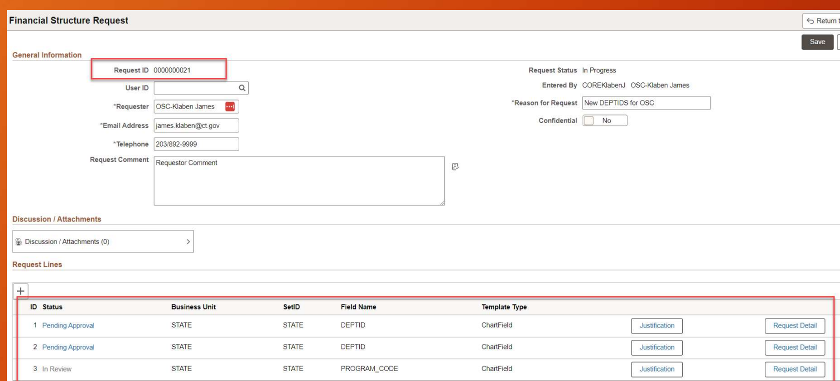
Structure Requests



-Structure Request exists as a tile on the new General Ledger and KK dashboard
-Clicking on the Structure Request tile will bring you to Financial Structure Request page
-The Structure Request page contains filters to view specific Request Statuses in queue
-(right screenshot) You will click the Add button to start a new request

Structure Requests

Unlike the Chartfield Request, each Structure Request can have multiple detail lines for more than 1 Chartfield Add/Update at a time



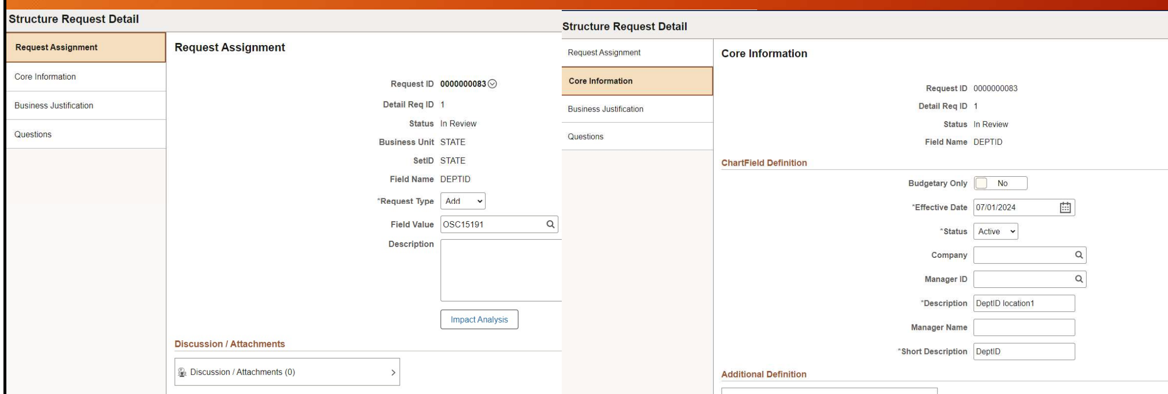
-The main request page contains the same general information as needed on the old Chartfield Request for Requester, Email Address, Phone, Comments, and Request Reason. Attachments are also available if needed.

-Each main request can have multiple Request Lines. Each Request line has it’s own approval path for the specific Chartfield value requested.

-Clicking on the Request Detail button brings you to the detail line selected(next slide).

Structure Request

Each request will require the same information as provided with the Chartfield Request form

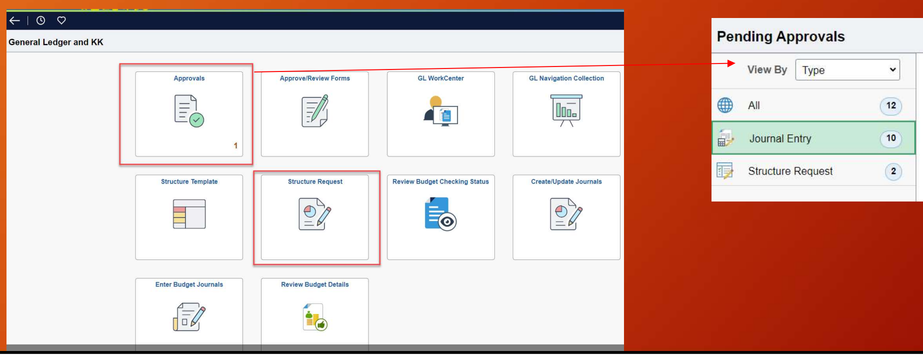


-The screenshots show on the left side navigation: Core information, Business Justification, and Questions specific to each chartfield value

-Again, this is the same information required as before with the Chartfield Request pages, but the horizontal navigation bar is gone

Approvals

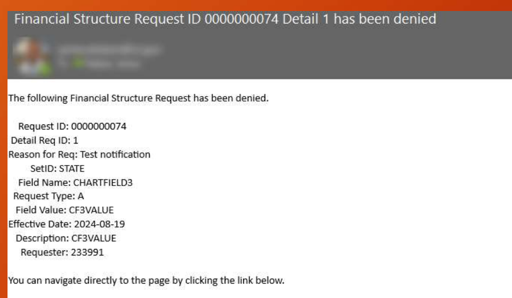
- Structure Requests and Journal Approvals (accrual journals) will show under the new Approvals Tile.
- Project ID and Payroll Account Code requests will continue to route for approval under Approve/Review Forms



-Approvals will be accessed under the new General Ledger and KK dashboard tiles
-Users will have the same roles with Structure Requests as they did with Chartfield Requests
-Journal Approvals can still be accessed through Journal Approvals menu under GL

Approval/Deny - Notifications

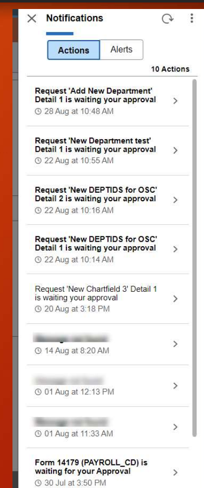
- Structure Requests, Journal Approvals, and Project, & Payroll Acct forms will all provide Notifications for approval through the Notifications bell and through email


Financial Structure Request ID 0000000074 Detail 1 has been denied

The following Financial Structure Request has been denied.

Request ID: 0000000074
Detail Req ID: 1
Reason for Req: Test notification
SetID: STATE
Field Name: CHARTFIELD3
Request Type: A
Field Value: CF3VALUE
Effective Date: 2024-08-19
Description: CF3VALUE
Requester: 233991

You can navigate directly to the page by clicking the link below.



-Project and Payroll Account Code forms remain unchanged
-All will use the Notifications bell and alerts

New Chartfield Value - Chartfield 3

- Chartfield for State-Wide Reporting
  - Created only by central agencies (OPM, OSC)
  - Will be useable by all agencies on transactions
    - Expenditures
      - Contracts, Purchase Orders
      - Vouchers
      - Payroll
    - Bills
    - Deposits
    - Journal Entries, Coding Corrections
- Examples for Use
  - IT Capital Investment Program
  - Cannabis
  - Sports Gambling
  - Covid
  - Storms
- Will appear across the system with go-live of upgrade
  - Payroll Account Codes (Combo Codes) will be available for Chartfield3

-Chartfield 3 will be like Chartfield 2 with the exception of agencies cannot create their own Chartfield 3 values.
-Agencies will not be able to create their own chartfield 3.
-Chartfield 3 will be useable on transactions for Expenditures and Revenue (Vouchers, Payroll, Purchasing, Bills, Deposits, Journal Entry)

Questions…

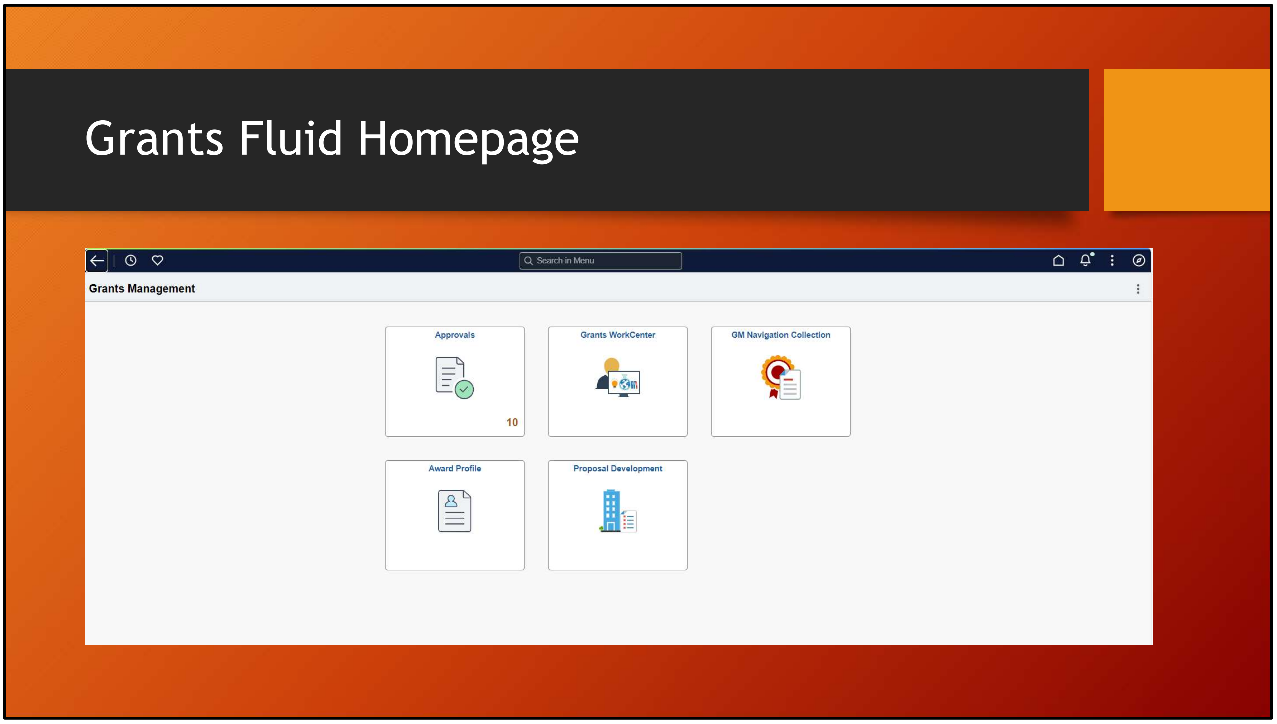
Grants Management

Vanessa Hoang

Grants Agenda

- Grants Fluid Homepage
- Grants Approval
- Grants Approval - Approve/Deny
- Grants Approval Bell Notifications
- Grants Navigation Collections
- Grants WorkCenter

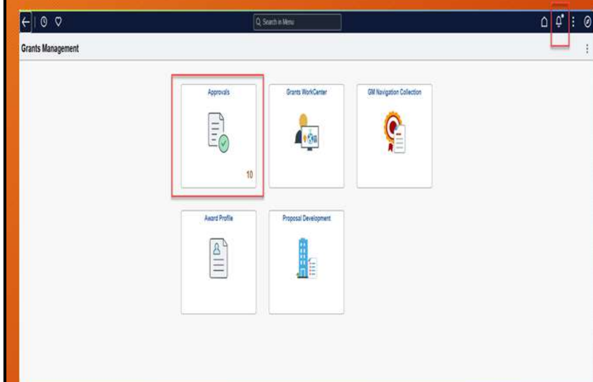
Overview of GM agenda

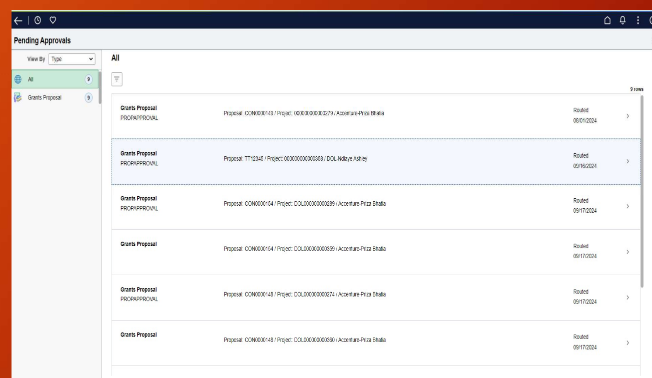


-Grants homepage include high frequency use functionalities
-Collection of grant components
-New feature include approval workflow (AWE)

Grants Approval

- Approval are through new approval tile
- Pending approval page from approval tile



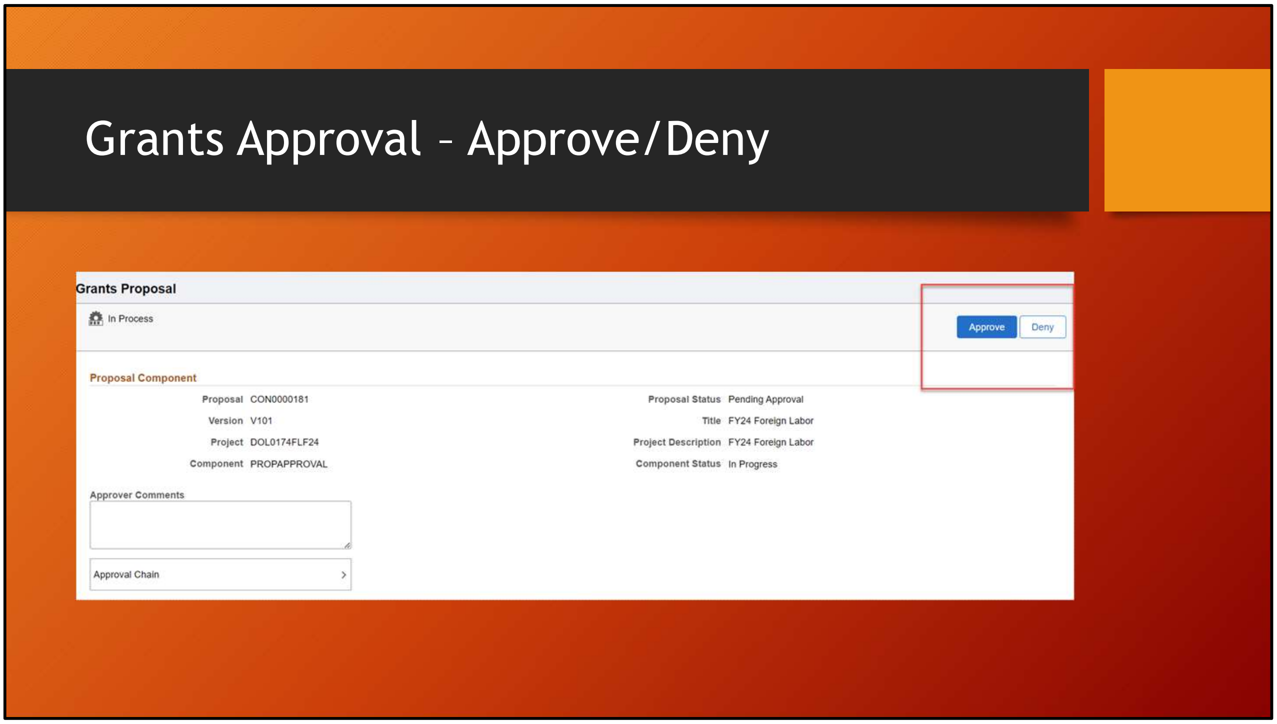


-Agency user can create grant proposal and then use approval process with approvers and reviewers within the approval workflow.

-Approvers can access the pending approvals using the Approvals tile

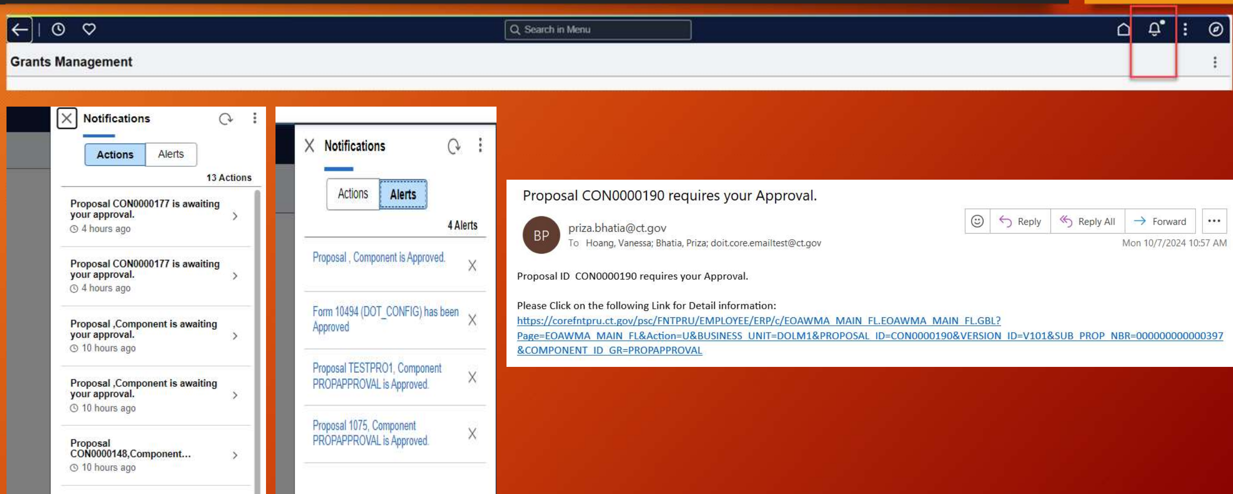
-Pending approval will provide a list of your pending approvals

-This is all based on current approval security roles



- This will enable different users approve or deny requests.
- User can review and approve/deny the proposal
- Approve- system will prompt you to provide comments (no comment necessary). Approval will routes to next approvers
- Deny – system will prompt you to provide comment, you will need to provide comments for denial. Denied will remove the proposal from approval chain.

Grants Approval Bell Notifications



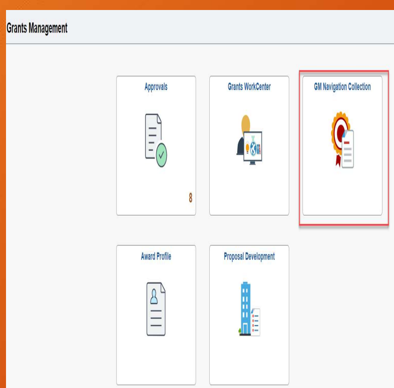
Notification Action: once approve or deny, item will clear from list

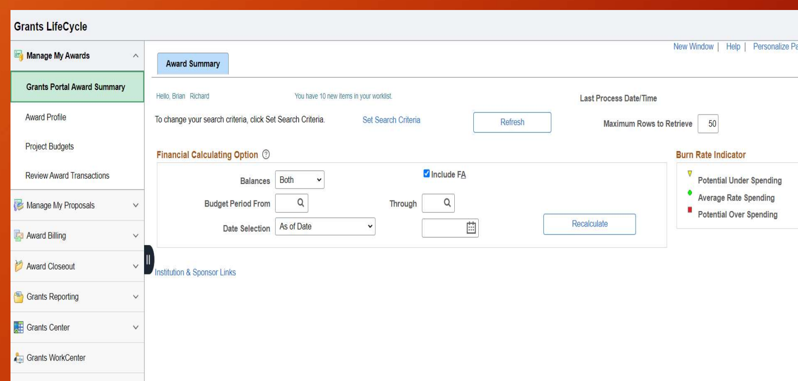
Notification Alert: Review actions have been taken. User manual maintain the list by (X) remove item from list

User will receive email notification which link will send you to pending approval page as well

Grants Navigation Collection

- Allow you quickly access links to various pages

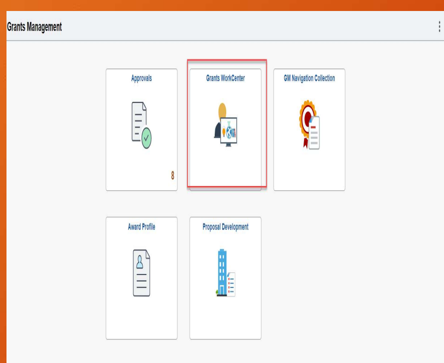


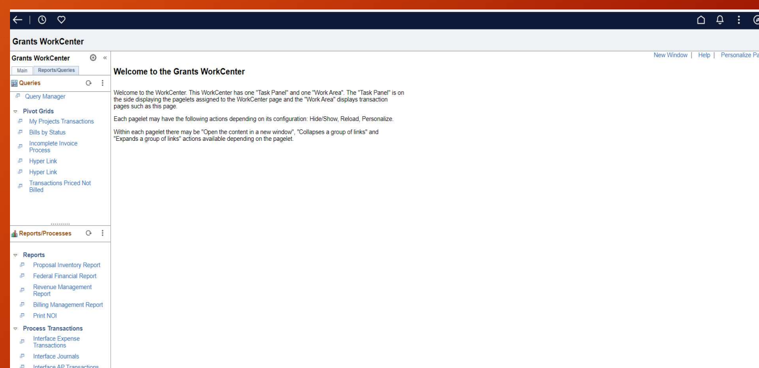


-Grant navigation collection enables users to access frequently used Grants components from a single place
-The left side of this page lists the components; the right side will display the component selected in the left side.

Grants WorkCenter

- Central place for user to access various pages and perform task more easily





-Grants workcenter is used to support user through lifecycle of the grant.
-Central navigation component that can help user access frequently used pages
-Enable you to access key transactional data, notification, exceptions, reports and queries related to grants

Project Costing Customer Contract

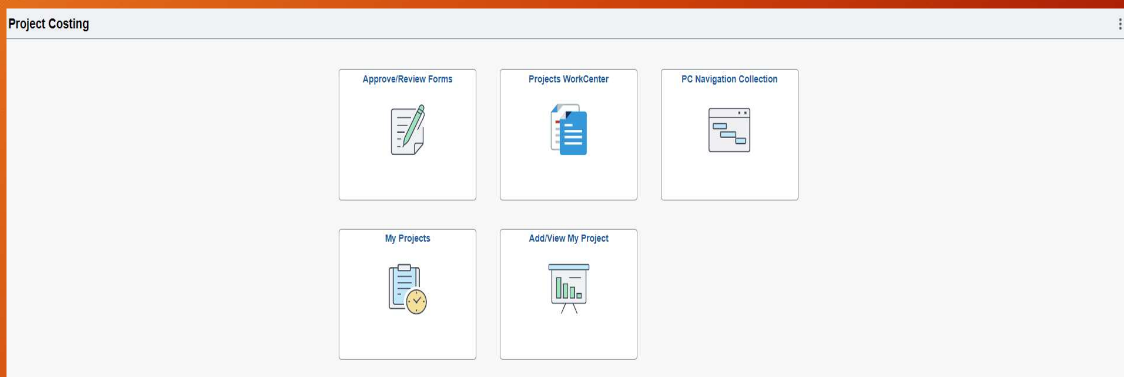
Vanessa Hoang

Agenda

- Project Costing Homepage
- PC Forms Configuration
- Customer Contract homepage
- PC/CA Navigation Collection
- PC/CA WorkCenter

Overview of Project Costing and Customer Contract agenda

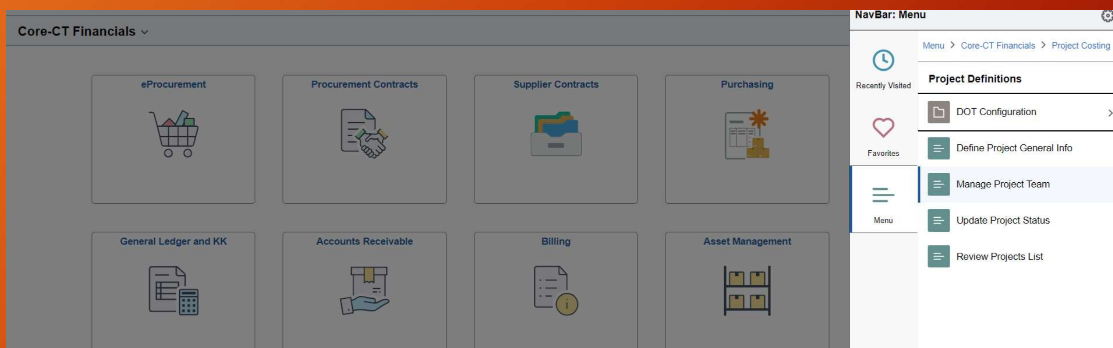
Project Costing Homepage



Project Costing homepage provide quick access to frequently use functionalities

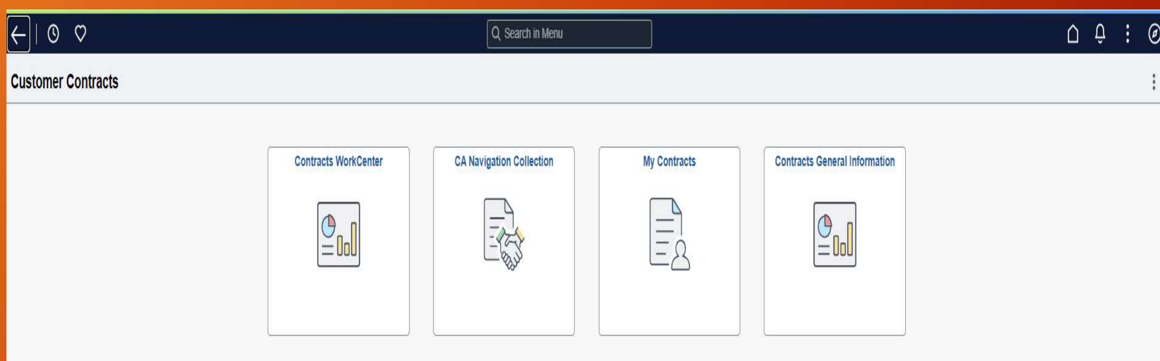
PC Forms Configuration

- An example of an item can only access through nav bar menu is PC forms



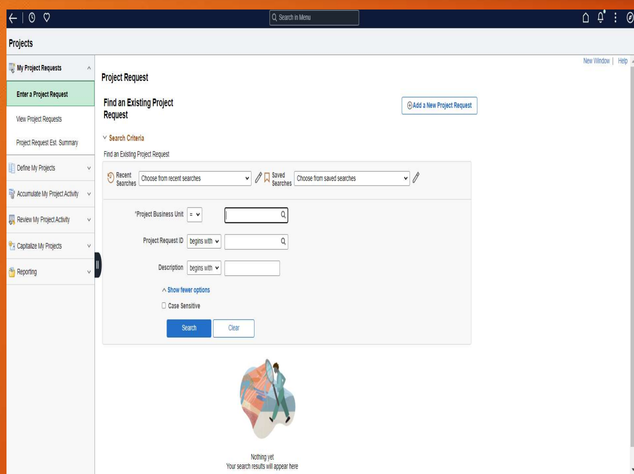
Many components would be available through tiles but there are some components can only navigate through nav bar menu.
An example is form configuration

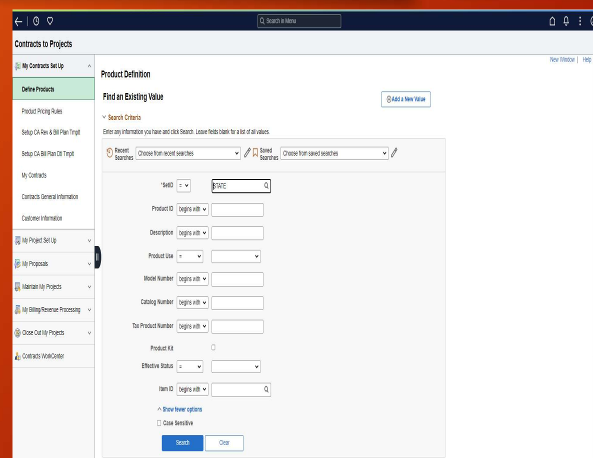
Customer Contract Homepage



Customer Contract homepage provide quick access to frequently use functionalities

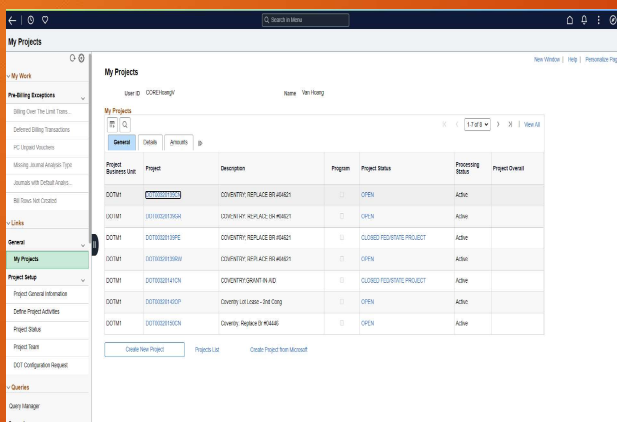
PC/CA Navigation Collection

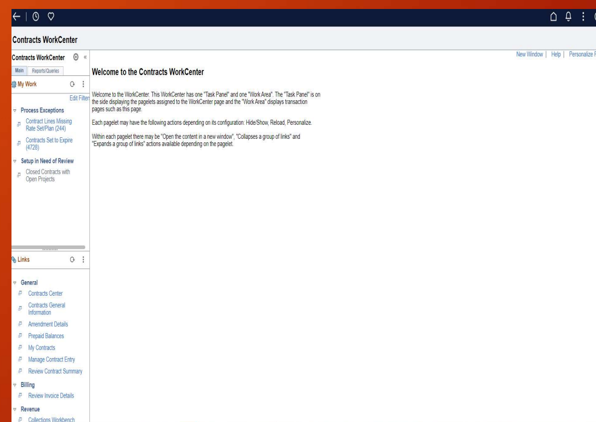




Navigation Collection: grouping of commonly use pages/links that would support user tasks

PC/CA WorkCenter





Workcenter: design for users to efficiently utilize frequently use pages for daily/weekly tasks

The right side of the page has been configured as a dashboard and displays specific pagelets that provide user info as soon as they access the workcenter

Some sections in workcenter are:

Links- minimize the number of clicks to access certain pages

Queries- provide access to public queries, private queries

Reports/processes- provide access to reports and processes user has access to

Questions…

EPM/STARS

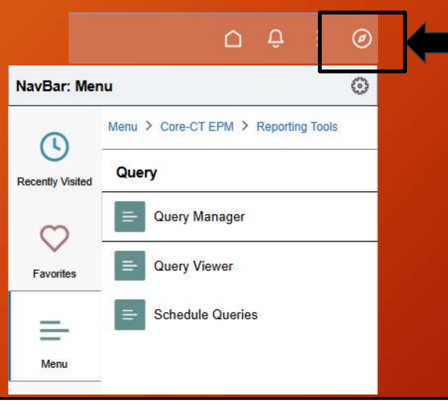
Wendy Monk

EPM/STARS Agenda

- EPM Navigation
- EPM PUM Favorites
- STARS Navigation

EPM Navigation

- Navigation: Main Menu > Core-CT EPM > Reporting Tools > Query

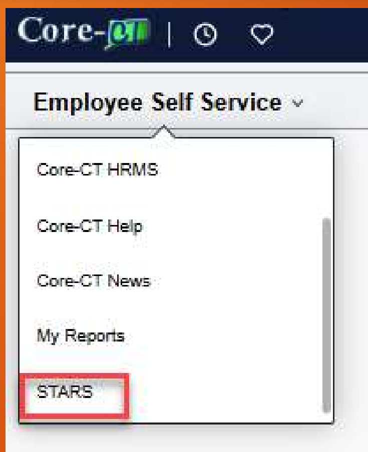


The Navigation to EPM remains the same except the NavBar is on the right-hand side of the page.

EPM PUM Favorites

- Run Controls will not be deleted.
- Pre-scheduled report or queries will have to be re-scheduled.
- Private queries will not be deleted.
- EPM Query Favorites *will* be erased.

STARS Navigation

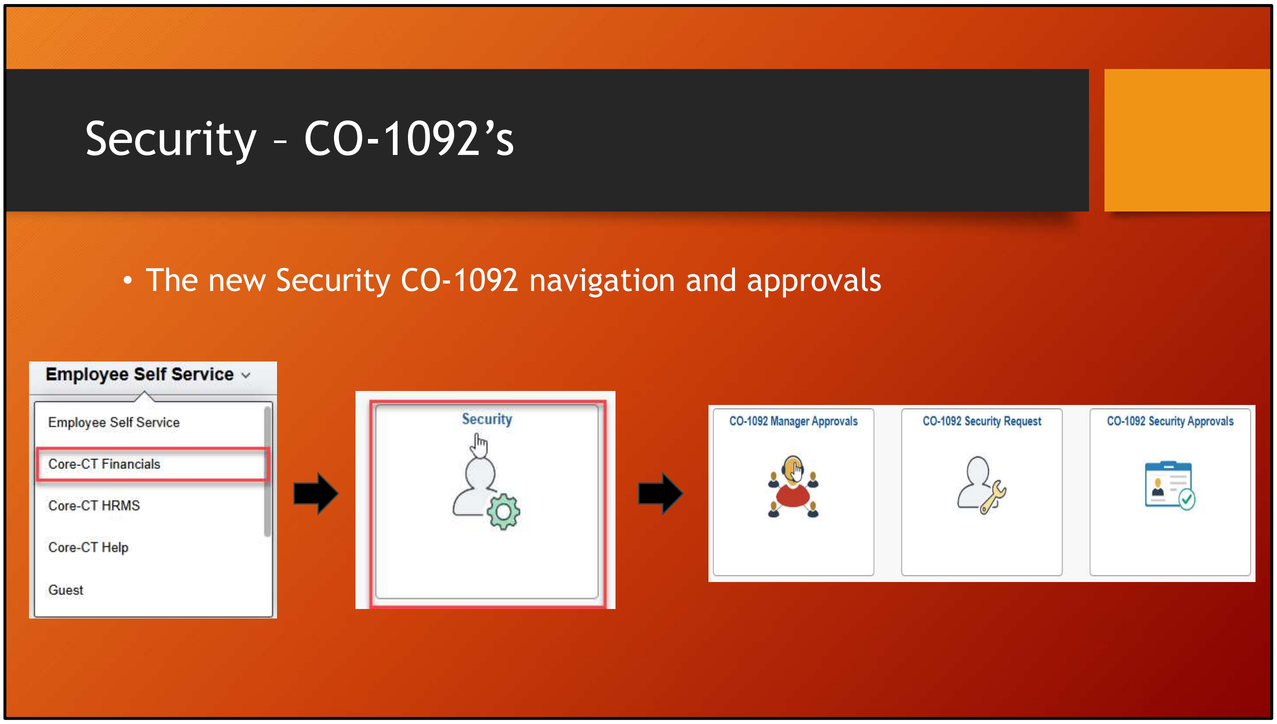


The new Navigation to STARS is the Left drop down, then click the STARS tile

Questions…

Security

Dustin Guarino



The security CO-1092 navigation and approvals have changed. There are now tiles.
Navigation: Core-CT HRMS > Security
You will be able to choose the next tile based on your roles.

A new Financials Security tile will be available for those users that have security roles. It can be found by selecting Core-CT Financials from the drop down menu. Here users assigned the CT_CO1092_LIAISON role can access the CO-1092 Security Request tile to create Fin CO-1092’s. Users assigned the CT_CO1092_APPRV_MGR will be able to access the CO-1092 Manager Approvals tile to approve CO-1092’s at the agency level. The 2 pages themselves will function the same as they did prior to this upgrade.

Questions…

Help Desk

Shanon Reutter

Agenda

- FootPrints
- Core-CT Website
- Clearing Cashe/Browser Info
- Reminders

FootPrints

- URL: https://footprints.ct.gov/footprints
- Routes Directly to the Team
- FootPrints Access
- Readiness@ct.gov (anyone without a ct.gov email address)

We encourage everyone to Log a ticket – Help desk answers tickets as quickly as possible when the tickets are submitted.

Keep an eye out for emails when you have a ticket open; the help desk will communicate through the ticket.

You can respond to the email from FootPrints and FootPrints attaches the email to the ticket and notifies the help desk that you have responded.

FootPrints Routing – The tickets are routed directly to the team that handles the module for faster processing.

FootPrints Access – If you are in the need of FootPrints access, please email the readiness mailbox with the subject FootPrints Access.

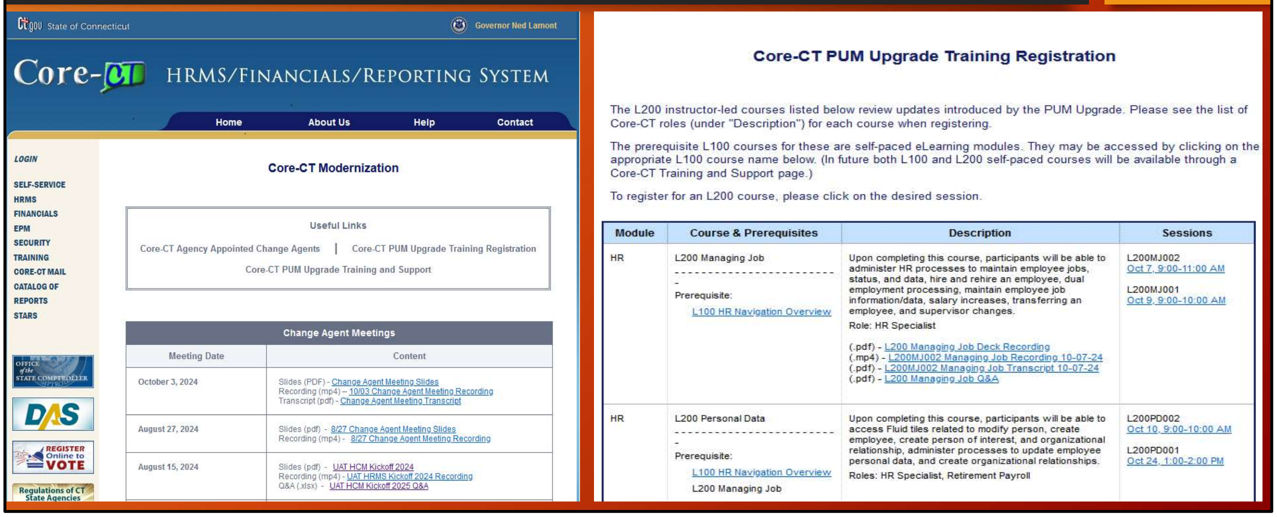
Readiness mailbox – If you have an email address that does not end in ct.gov, you can email the readiness mailbox for the Help Desk to create a FootPrints ticket on your behalf.

Again, please watch for emails from FootPrints; even though you don't have FootPrints access, you can still respond to the email and it will attach all emails to the ticket and will also notify the Help Desk you have responded.

Please refrain from reaching out to the module leads as we need to document every issue that come in.

Core-CT Website

https://www.core-ct.state.ct.us



The Core-CT Modernization Page is where you will find all of the decks from previous Change Agent Meetings along with Recordings, Transcripts and Q&A's.

There is a link for the Core-CT PUM Upgrade Training Registration page that contains the L100 classes, all the previous class Recordings, Transcripts, Q&A's and if there is any class available to register for.

eLearning Modules:10-15 minute training modules that can be viewed at any time, at your own pace. The steps can be saved as a PDF for your own reference.

Instructor-Led Modules: L200 courses that cover more complex topics and are currently available as instructor-led training sessions lasting up to two hours. These will become available in the latter part of October as recorded courses to be viewed at your own pace.

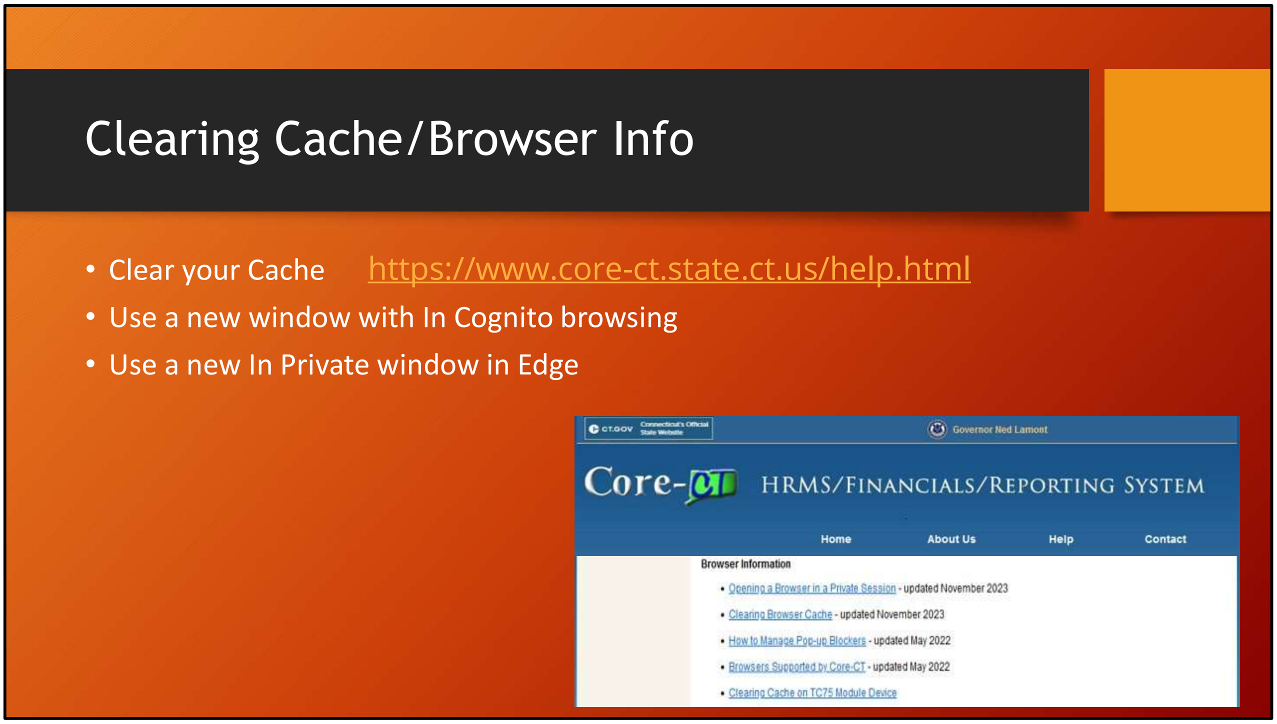
There is also a new link on the modernization page for Core-CT PUM Upgrade Training and Support.

Here you will find Infographics which are one-page documents that recap cross-module topics such as navigation and approvals.

You will also find job aids which are printable documents outlining the business process and steps within Core.

You will find eLearning Modules which are 10-15-minute training modules that can be viewed at any time, at your own pace. The steps can be saved as a PDF for your own reference.

You will find Instructor-Led Modules which are the L200 courses that cover more complex topics and are currently available as instructor-led training recordings that can be viewed at your own pace.



It is important to Clear your browser cache, especially when logging into Core-CT for the first time after the upgrade. You should also clear your cache anytime something doesn't look right to you because one of the first things the help desk will ask you to do or will ask you if you have cleared your cache.

If you are having problems with your browser, you can also use a new window with "In Cognito" browsing or use a "In Private" window in Microsoft Edge

Reminders

- Favorites ***WILL NOT*** carry over
- Run Controls ***WILL*** carry over
- Scheduled Reports/Queries will need to be Re-scheduled
- Obsolete Devices
  - All devices must have an up-to-date browser to properly access Core-CT
  - Device Operating System software and App/Play Stores must be up-to-date to update browser apps
  - If a manufacturer stops supporting a device, then it won't be able to update

Just a few reminders:

Favorites will not carry over with the upgrade
Run Controls will carry over with the upgrade
Punchout will not be available on mobile devices
Scheduled Report/Queries will need to be Re-Scheduled

Also, Obsolete Devices…

1 All devices must have an up-to-date browser to properly access Core-CT

2. Device Operating System software and App/Play Stores must be up-to-date to update browser apps

3. If a manufacturer stops supporting a device, then it won't be able to update

Questions...

Closing

Brianne McKenna

Please share this information with your co-workers.

Glossary of Fluid Terms

- **APPLIES TO HR AND FIN**
- **Homepages:** Homepages are the starting point for navigation in fluid. The Employee Self-service (ESS) is the default homepage that displays after login; users will use the homepage drop down to navigate to different homepages, based on their roles.
- **Dashboard:** a dashboard is a specific module page, that organizes functionality, which can be accessed via a tile.
- **Tiles:** tiles are buttons found on fluid homepages and dashboards, when clicked they link to common business transactions and high action functionality.
- **Notifications Panel:** users can access the notification panel, to view Actions and Alerts, which replaces the Worklist. Users can also adjust settings, refresh the notification window, open a transaction, mark an action complete, or dismiss an alert.

  
- **Global Search:** global search can be accessed, to perform keyword-based searches.
- **Fluid Pages:** Fluid Pages are a new interface that adds tiles to homepages for navigation instead of cascading pagelets or menus. Fluid is a responsive user interface that works on desktops, tablets, and phones
- **Fluid Banner**: a standard banner, appears at the top of every fluid page, the fluid banner provides access to buttons such as favorites, home, and other standard buttons.
- **NavBar:** the navigation bar, also referred to as the navbar can be found on the fluid banner and provides access to the classic, non-fluid navigation.
- **Fluid:** fluid is a standard user interface, that provides users with the ability to access applications in a variety of ways, including smartphones, tablets, desktops and laptops.
- **FIN ONLY**
- **Navigation Collection:** the navigation collections. Collection of content menu items and content reference folders in one centralized location by module.