FIN PUM Delta User Group Webinar (AR,BI,GL,GRT,PC)-20241119_165515-Meeting Recording

November 19, 2024, 3:10PM

1h 44m 18s

Reutter, Shanon M started transcription

Braga, Donna 0:05

Good morning.

Welcome and thank you for coming to the financials user group.

This is for accounts receivable, billing, general Ledger commitment control grants and project costing.

Those are going to be our topics today.

There's another meeting later this afternoon that will go over some of our supply chain modules such as purchasing E procurement.

Inventory, asset management, etcetera.

All right. So if you're in this meeting, it's about ARB billing, GL commitment control grants and project costing.

So my name is Donna Braga.

I'm the core CTERP business team lead.

And I'm happy to be here today with the rest of the team.

We have a great presentation for you today.

I want to thank you for taking the time to join us.

This is, you know, a major upgrade for core.

It's been quite some time and it's really important to share this information with you.

So the other thing is if you have any colleagues who weren't able to make it to this presentation, please share the information with them.

We will get the recording posted on the web page the modernization page. It takes us a little bit of time, so Please be patient. We have to get it up on a bit server, but it will be posted the recording and the transcript.

And the slides.

OK so.

Next slide please.

Just a little bit of housekeeping for those of you that did want closed captioning for this meeting. It is available, but you do have to turn it on yourself.

So if you use the little ellipsis where it says more on the top of your ribbon, again, this may or may not be available on the web browser, so you might want to use the app instead, and you go to settings.
Accessibility.
And then you can turn on your captions.
The other feature that we're enabling today is the Q&A feature.
So again, that's in the ribbon at the top and hopefully that will be enabled for most of you.
I think it helps again if you're in the app versus the web browser.
But in the event that that does not work for you, you can use the chat for questions.
If you can access Q&A, we ask that you use the Q&A feature.
It helps us to track the questions a little bit easier.
Alright.
So there are going to be we're going to have different sections. There will be time for questions at the end of each section.
We're going to take a quick five to 10 minute break halfway in between this meeting.
And again, Q&A is enabled for questions in the slide deck.
The recording the transcript will all be posted to the modernization page.
So if you have colleagues who could not make it, please ask them to take a look at the modernization page as well as the training page, OK? And they'll be more on that later.
Next slide please.
So a new path, a new road, right?
If there's one thing that you're going to take away from this meeting today, it is that your business process, with the exception of asset management, I'm going to give you asset management folks a pass and you'll hear about that later.
But your business process is not changing, right?
So how you did it last week is how you're going to do it this week, right?
How you're going to get there could be a little bit different.
The navigation, the look and the feel, of course ET is going to change, and you're going to be.
Really surprised if you haven't seen it yet.
You can be really surprised when you see the look and feel of it.
OK.
It's going to be more updated, more designed to scale to different devices.

And you know, we're getting up with the times. OK, but that's going to be the big shock.
So, you know, take a deep breath and remember that your business process is still your business process, right?
So whoever approves for you today.
Whatever your limits are today, whatever your guidance is today, that's going to stay the same.
OK.
One of the other things though, is we do want to share this with you. If you do have business process documentation, I hope you do. If you do, you might want to update your screenshots.
Now's the time if you have a couple of days or day and a half while core is down.
And there's training documentation on the website we that you can use to help you with that. And if you don't have any documentation for your business process, now's a good time to go to that training site.
Use the job aids.
Use the e-learning videos and use those to start implementing some good business processes and training for either folks that are changing their positions.
Or we've got a lot of new folks coming on board. So this is a great opportunity for you to.
Use what's out there that's being updated for you, OK.
You know, we've been reaching out in core to the agencies.
We have their change agents that have been assigned to every agency to disseminate information.
You may or may not be a change agent, or you may be hearing from 1:00.
So if you do get a question or a survey from your change agent, please respond to them and help them out because they are reporting back to us on the readiness of your agency for this upgrade.
Again, I'm going to. We're going to refer constantly to the modernization page we've got.
The training and registration page.
There's one more user group coming up this afternoon, but there's recordings of all of the meetings that we had.
Slide decks, transcripts and again this one will be posted.
Some of the documents that we have that you can use on the training page, we have

these things called infographics, which are great.
One page Cheat Sheets.
On things like navigation and approvals and entering your timesheet.
The timesheet one you'll have to look under HR time and Labor, OK?
Or check cross module.
We have updated job AIDS e-learning videos and they're nice and short.
I have a short attention span.
We said make these 1015 minutes Max.
We have again the recordings of the instructor led training. If you weren't able to get to those, all right.
But again, the major take away from this meeting is that there's no business process change with the exception of asset management, except for the navigate. It's the navigation, the look and the feel of core.
So how did I do it last week?
That's how I'm going to do it this week.
Those are my.
Guidelines and rules.
OK.
Next slide.
So we've got a jam packed agenda for you this morning.
Again, there'll be a chance for questions at the end of each module and at the end of the session, Brianne is going to take you through high level navigation and approvals.
Chris Marchesi is going to take you through accounts receivable.
Agnes will take you through billing Jim Klaben, GL and commitment control, and Vanessa's going to take you through changes with grants, project costing, and customer contracts.
Wendy is going to show you EPM and stars changes.
Justin is going to update you on security and Shannon is going to go over some reminders with the help desk and then Brianne will round up with questions at the end.
With that, I'm going to hand it off to Brianne.

McKenna, Brianne 8:43
Thank you, Donna. Good morning, everyone.

My name is Brianne McKenna and I am the core CT Financials' team lead and I am happy to share some good some good information with you could head on to the next slide.
We are going to talk about the new navigation as it appears in core CT when you will log in for the first time, we'll go through home pages, tiles, the navigation bar menu, how to continue to alphabetize, and the new feature entitled Collections.
OK.
So when you log into core CT for the first time, this is what you will see.
This is the page that you will see.
And this page houses a collection, a list of home pages on the left hand side so you can see where it says employee self-service.
This is a home page. OK, so you're going to select the drop down arrow on the home page related to their task as in this example. We're going to choose core CT financials.
Other home pages would include the core CT help menu, my reports and hrms, but again, we're going to use core CT financials for this example next page please.
So when you log into core CT, each module, you'll see a tile for most of your modules, right?
So core CT financials was selected. Now in this example, we're going to select the purchasing tile, clicking on the purchasing tile will direct you to the purchasing home page made-up of more security related tiles.
Now these tiles are high action boxes located on the home pages, and they're based on your roles.
So you will not see tiles for.
In addition, you will not see tiles for every function or transaction you do within your module.
These are only for frequent processes.
And you will continue to use the main menu for other functionality. We like to call these high action tiles.
Now, if it's not a tile, you will be able to it in addition to, you will continue to navigate in the NAV bar menu and that's on the right hand side of the page now.
So that is a big change.
It's no longer on the left in the top menu, it's now in the right NAV bar.
OK.
So on the top right.

Yep, on the top right you will see a circle with an arrow on it.
This is new. The NAV bar replaces the previous navigation drop down menu which was on the left hand side.
When you select the navbar, 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 in a later slide.
Have bar menu. How to alphabetize so I know today a lot of you use the alphabetize feature which is on the top which is on the main menu with the clicking of the arrows. We still have that feature but you have to enable it and I know you.
Guys like this option, especially if you're in the AP module because it's in the top.
So all you have to do is you have to click when you're in the NAV bar, you have to click the settings wheel which is.
Highlighted or you see it's circled on the red box.
That's what we call the settings wheel and it's located.
Inside the navigation bar, once you click the settings wheel, you'll be able to select the alphabetize box.
Click save and then it'll just your menu for you.
Bread crumbs? We still have the bread crumbs.
They are no longer at the top of the screen. They are going to be inside the NAV bar menu.
And you'll be able to drill into them like you do today.
Elections collections are new with this.
Upgrade it's a new functionality of high action processes for your module.
We will help you with your daily tasks.
Run smoother because it's 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 work centers and it will. It will most likely be based on your personal preference and.
What you choose to use?
So that completes the navigation section before I move into the approval section, do we have any questions on that?
OK.

KD **Klaben, Dianna** 13:55

Here there is one question in the Q&A and the NAV bar menu, can we click on the double line icons to the left of the options to drag the NAV bar tiles manually into any order we would like?

McKenna, Brianne 13:57

OK.

No, you cannot. They will be locked.

Klaben, Dianna 14:17

More questions?

McKenna, Brianne 14:21

Now we're going to move on to the approvals.

The approval slide.

We're going to discuss the new fluid approvals.

The notification Bell settings and what actions and alerts mean.

This is where most of you are going to see the biggest change for your modules.

OK.

So again, we're navigating to core CT financials and in this example, we're clicked on the purchasing tile.

Within the purchasing module there are multiple. There are more tiles and there is one that is called the approval tile.

So approvals are now through.

Fluid approval depending on your module.

The modules with approval tiles are.

EPO purchasing, accounts payable, asset management, security forms and the new structure request form.

And once you click on the approval tile, they'll bring you to the pending approvals page. The new pending approval page will capture all approval related documents waiting for your approval.

You click on each row individually and drill into the document to approve the biggest change here is.

This replaces your work list.

The pending approvals page will capture all of the approvals you may have in one interface, depending on your roles, it is possible to see EPO transactions purchasing

transactions in addition to other modules in order to help filter these transactions.
There is a filter box option at the top.
The page here you can sort by requester date, transaction ID, etc.
In this example, on the left hand side of the pending approval page it accept.
It separates the documents by module.
You have the option to use the date.
Route it from priority requester and type.
A great tip is if you want, if you list if everything is listed there and you have multiple modules where you do your approving, you can use the control F feature and type in the document number, whether it's the purchase order epro.
A form number. You can do a control F and find it and it'll highlight it in orange.
Once the transaction is selected for approval, you have five options depending on your module.
And this is pretty it is the same as today.
For most modules approved, deny, push, back, hold and request information.
Once you approve, you have the option to add comments if you need. However any other transaction they all require comments.
The comments are mandatory, so if you're going to deny, push, back, hold or request information.
You need to add additional comments to those sections.
Each module we'll discuss in more depth in their individual section.
The notification bell.
New notification bell can be used to organize your approvals.
This is located at the top right hand side of your page.
It's just it's a little bell.
And if there's a new notification, you'll see the green dot when you click on the bell.
A list of actions or alerts will appear. Clicking on either of these will take you to the document approval page.
Now, in order to activate your notification settings, you will have to do a one time configuration.
This is very important to make. Note when you log in for the first time after the upgrade.
If, especially if you are an approver, you're going to want to do this so and then you want to go to. Sorry.
You're going to click the notifications bell, and then there's a three dot ellipsis.

Select the settings.
Make sure the display full notification text is toggled to yes.
This will help you see the entire notification that you're getting.
A1 time deal, so that's good.
I have a question.
OK.
So depending on the module and then transaction type, A notification action or alert will be created. Clicking on either will take you to the specific the specific transaction document page.
The key different is that after a user processes the transaction, a notification action alert will be cleared from the list.
Alerts are maintained by the users and to remove them from the list you have to click the X and again each module will discuss this more in depth.
As we move on.

KD **Klaben, Dianna** 19:49
There was a question in the current core CT, the work list and other search results were formatted in a way that could be quickly copied and pasted into XLS a table for review.
Is there a CSV export for items in this work list? If is there a query where we can run to review all items in the approvals view both for us and for our teams?

McKenna, Brianne 20:16
No, this is going.
This is its own specific list.
You can organize it by the filters that I had shared, but there is no download to an Excel.

KD **Klaben, Dianna** 20:31
More questions?

McKenna, Brianne 20:34
Alright, so that.

Braga, Donna 20:35

Just I'm sorry. Can I just do a follow up on that is, is that for what type of approvals is it for security?

Alright, that's fine.

We can follow up with let's see requisitions, POS. OK.

KD **Klaben, Dianna** 21:05

It's for acquisitions, yeah.

Braga, Donna 21:07

All right.

Thank you.

McKenna, Brianne 21:11

K.

So that brings me to a good question and that brings me to the question slide.

So here we went over the most global changes for navigation and approvals for this problem upgrade. Are there any other questions related to that?

KD **Klaben, Dianna** 21:32

No questions at this time.

McKenna, Brianne 21:34

No questions at this time, OK.

So if there are no questions, I am going to hand it off to Christopher Marchese.

KD **Klaben, Dianna** 21:44

Actually there is one question that came in.

McKenna, Brianne 21:46

OK.

Just kidding, Chris.

KD **Klaben, Dianna** 21:49

So regarding the previous section on the high action tile screen, will there be other

options that are nonhigh action tiles that don't appear on this screen?
If so, where would we find them?

McKenna, Brianne 22:02
So the high action tiles again will be on the home page. If you have to navigate through the menu navigation, you will find all your other transacting and business processes that way, just like you do today.
It's like the main menu, but now called the navigation.
NAV bar.
Actually it's called the NAV bar today.
It's the main menu, but everything else, even the action tiles, will be located in the NAV bar.

Klaben, Dianna 22:35
No more questions.

McKenna, Brianne 22:39
OK.
Right. Handing it to Chris.
Thank you everyone.

Marchese, Chris 22:47
Alright. Thanks, Bree.
Let me just see take control. There we go.
Let's.
At the end of the slide show shrink for everybody.

Klaben, Dianna 23:09
No, everything looks fine.

Marchese, Chris 23:11
OK.
Sorry. Alright, so hello everyone.
Good morning.
Thanks for attending the financials user group.

My name is Chris Marchese.
I started in the middle of an upgrade back in 2006 with core CT.
And have been primarily working in the billing accounts receivable and banking modules ever since.
And this will be my fourth round of a major upgrade. And as Donna alluded to, it's probably the most impactful in terms of look and feel.
But it's not.
It's not a scary, scary change.
We'll get used to it quite quickly.
I believe.
OK.
So counts receivable agenda today.
We're going to talk about the accounts receivable related tiles.
We're going to go into the work Center for Arkansas.
You have the Arkansas Navigation collection and payments navigation collection. So an accounts receivable. We have two navigation collections.
You know, some other modules typically have one.
They gave us two. We're going to review the collection Workbench and some new functionality within that.
We'll cover some other tiles which we've added as.
Somewhat shortcuts that we believe will be helpful for you.
And some new functionality built into the customer statement and donning letter process. We'll go over some of that.
So the accounts receivable tiles when you we drove from our home page and under financials, you'll see a list like you just saw previously with all the modules.
So we're going to start with the accounts receivable high action tiles.
We have a total of 7 tiles.
Some are one stop shop type tiles.
The receivable work center.
The Collection Workbench brand new are the navigation collection tiles and like I said, some of the high action tiles such as your regular deposit which is your pick list.
And additionally, we added the customer statement and donning letter to this. So 7 total tiles depending on your screen size or whatever device you're logged into, you may see two rows just like the screenshot on the slide shows.
It may break it down into three.

I've been in some other devices where it's shown differently and that's all based on the fluid UI, the fluid user interface.
So the receivable work center again it's a one stop shop. So you all your AR daily needs.
It will look differently now.
The existing functionalities reengineered to meet fluid.
So it will be a little different compared to what you see today.
So jumping right into it, the receivable works.
I know we still have the four main sections, but it is all now vertically aligned on the left side navigation.
So we have our my work, your links, your queries, your reports and processes.
Now the main sections and the sub sections will collapse and expand on the left hand or the left side navigation and then additionally you can hide or show the left side navigation.
To ink to create more workspace. If you need it.
And that's all work centers will be will work similarly.
Getting into the first main section, the My work section.
We still have the sub same subsections as you as you have today.
You have your deposits and payments, your items and your exceptions, subsections which collapse and expand as you need.
Quick reminder, in order to take advantage of these my work links, you do need to set up your filters just as you did today.
In accounts receivable each my work link will use a its own individual filter.
So you will have to set them up.
9 total filters for all of these.
But it's a one time setup. Once you set it up, you don't have to do it again.
New with the upgrade is highlighted in green.
The direct journals to complete my work link, and if you're familiar with direct journals after you enter your chart fields and you click the lightning bolt, there is a.
Complete check box that you must also select and save so this Y work link will highlight any direct journals that the accounting entries have been created for, but the complete check box was left unchecked and so it's a great addition to the to the work center and AG.
And myself encounter this pretty much monthly where someone may have forgotten to.

Mark it complete in the deposit.
Still sits out there until Arkansas month end.
Also, depending on the my work link that you're working in, you will have various actions that can be performed and one of the new actions which I believe exists on every my work link, not just for Arkansas, but all modules is the e-mail notification action Now this will.
Let you enter manually an e-mail address and it will send a system delivered.
E-mail to the recipient.
It will basically let them know of what is showing up under those my work links and give them a link to click on for further action.
The other links or the other main sections which are your links, your queries and your reports and processes remain unchanged, but they will be on the left side navigation and it should provide access to the majority, if not all of your day-to-day navigational pages for account.
Receivable.
So jumping into the first of two navigation collections.
We'll talk about the Arkansas Navigation collection.
Now this is set up very similar to a workcenter with the left side navigation being able to collapse and expand.
But navigation collections are very much more task oriented.
In the Arkansas Navigation Collection is very customer and item based.
It's made-up of four sections. We have the my customer section, which will give you access to your customers and customer contacts and customer contacts are very important with this latest upgrade to take advantage of everything.
You have your my receivable item section which grants access to various item related pages pending your security.
So you may not see all five that are shown in the screenshot.
You may only see three, for example.
So security is in place.
Throughout all of your navigation collections.
You have a my collections section which point you to different collection related inquiries and processes such as your customer statements and donning letters.
And my reports and analysis section which gives you the two most common aging reports.
So it's very like I said, very task oriented.

In regards to customer and items.
The second navigation collection for Arkansas is the payments navigation collection.
This NAV collection is very deposit and payment based.
It has five total sections.
The first being the online payments, which is your regular deposit.
So this is where you would go to see all your pick list.
The apply payment section.
Brings you to the payment worksheet, so if you're building, updating, or finalizing your payment worksheet by setting it to batch standard, so it gives you those three options.
Direct journal payments section so you can create your direct journals or you can review coding on past payments that happen to be directly journal as well.
You have your review payment section, which you can.
Search for or research past deposits and payments and see what you did with them.
In a report section which gives you access to four different point in time reports.
Those reports are very flexible reports where you can run year to date, month to date, particular date range and it'll give you a variety of information on your deposits and payments.
So all of these pages in both of these NAV collections you have access to today again they just kind of built a very mini work center like task oriented NAV collections to give you access to a lot of different pages with in one space.
Moving on to the collection Workbench, this is similar to the receivables Work center in the sense that it's a one stop shop type of functionality which will give you a lot of accounts receivable information based.
But this is based on a single customer.
So the collection work bench for a single customer will give you item and aging information, payment history, customer correspondence history which is your customer statements and donning letters as well as viewing conversations or adding customer conversations all in one space.
So on the items tab, you'll get a listing of your open items and you can click directly into each one if there's multiple.
You have the option to select item actions based on what you select here, so you can generate.
Arkansas Agent reports out of here tie these to a customer conversation directly from here and there.

There's a few different item action that you could perform.
And buried in the detail 7 tab.
Not sure why it's this hidden, but it is.
You can view the invoice image directly.
So when we finalize imprint in billing, a image is stored in the system and you can access it from the collection Workbench. With that icon you can also e-mail an invoice directly from this page as well. So you can envision particularly having a conversation with a customer or.
Even on teams, if it's a state customer.
And they need a copy of the invoice image or something like that.
You can get it directly from here.
On the aging tab.
This will summarize the aging amount.
How many items make up that amount and buy the aging category? So in this example we have an item out there that's 61 to 90 days late.
On the Payments tab, there's a outstanding payment section, which, if there's any incomplete deposits out there that are tied to a customer, it will display there. But it also shows a complete listing of the payment history for a customer.
And to make things a little easier, you have a date range you can search by to narrow down if you're looking for past payment history on a customer.
The correspondence tab.
This is where there's some new functionality from the up from this upgrade that you don't have today.
So today you will see a customer statement history, but you will not see the two highlighted icons which are statement, image and e-mail statement.
So going forward with this upgrade, when you run a customer statement, it will store it just like it stores an invoice today.
It's finally storing the statement image and you can e-mail it directly from the Collections Workbench.
So that is a very nice feature to have.
You can envision talking to a customer.
And saying I sent you a statement.
And if they never received it, you can send it directly to them right from this.
Correspondence tab.
The same holds true with donning letters.

We have a donning history, but new with the upgrade the letters are stored as Dunning images and you can e-mail them directly.
You will need to manually type in the e-mail address however.
Customer conversations, you'll get a history of customer conversations that may have been entered or and or you can add a conversation directly from this tab.
So other tiles.
So this is where we decided.
To add some of the more high action tiles that we believe will benefit you directly into the from the Arkansas dashboard. So we added regular deposits, everyone's favorite.
Give you access to your pick list right from this page, and then we added customer statements and donning letters.
We added customer statements and Dunning letters.
Because there's some new functionality that has been added in addition to storing them on the collection Workbench.
On the run control parameters, we now have the capability to e-mail the customer statement.
This has been a long overdue feature for several years we've had Arkansas users wondering why we can e-mail invoices directly from the system, but not customer statements or donning letters. We do now have that.
Functionality. So there's a check box on the run control parameters e-mail statement.
And similarly dunning letters.
There is a checkbox called e-mail Dunning letter.
And.
Built into the job, the.
System or will go out and retrieve the customer contact.
That's tied to the customer and automatically e-mail the customer statement or donning letter to the.
Customer contact.
So that is a great bonus. I do want to.
Make sure we're clear that a customer in order to take advantage of this functionality, a customer contact must be configured.
And just so everyone's clear, Allstate customers are already set up for this.
Core CT.
So Agnes and myself, we maintain the customers and customer contacts for all the

state agency customers.
If you want to take advantage of this feature, you will need to set up your own set of customer contacts for your external customers and again any if you need any assistance with this, you will have to log a ticket and we could walk you through the process on.
How to create a customer contact?
It's pretty simple, but it's definitely a feature that.
Was long overdue and should make everybody happy about not having to.
Snail mail them any longer.
Oops.
Went back too far.
Do you want questions now?
Brie after Arkansas, or?

McKenna, Brianne 41:02
Yeah, I think that's a good idea.

Marchese, Chris 41:03
All right.
So I'll take any questions if there are any.

Klaben, Dianna 41:12
There's none at this time.

Marchese, Chris 41:15
OK.
I'll pass this on to Agnes to go over billing.
Thank you everyone.

Reutter, Shanon M 41:24
She going to take a short break.
We'll take a 5 minute break right now.

Marchese, Chris 41:26
Oh, OK.

Reutter, Shanon M 41:29

So everyone can return.

Actually return at 11:00.

Join us.

We're taking a quick break and we'll resume at 11:00.

OK, everyone.

It's 11:00. We're going to get started.

Magnus, you're up.

Klaben, Dianna 49:05

Before we get started, there are a couple of questions in the chat.

Reutter, Shanon M 49:16

Go ahead, Diana.

Klaben, Dianna 49:17

OK. The first question is, will quasi agency customers be updated by Chris and Agnes or by us?

Kowalewska, Agnieszka 49:34

Each agency.

Is taking care of their own customers.

We, myself and Chris, we take care of the state customers and federal customers and I hope it answers your question.

Klaben, Dianna 49:53

Thank you, Agnes.

The other question the I have one more.

Kowalewska, Agnieszka 49:54

We can.

Klaben, Dianna 49:57

The other question is if our customer database is already set up with DPH and our case manager database, do we need to set these all up again?

Kowalewska, Agnieszka 50:08

No, no, it's the same set of the customers and as Chris mentioned, don't worry too much about this because it seems to be like it's difficult, but it's not.

We have this already in the system.

You can open a help desk ticket and we're just a team Callaway from you guys.

So don't worry too much.

Klaben, Dianna 50:32

Thank you, Agnes. That's it for questions.

Kowalewska, Agnieszka 50:41

One still.

Good morning.

My name is Agnes Kowalewska from Core-CT.

I work with Chris and take care of accounts receivable, billing and banking modules.

A lot of you know me from accounts receivable and billing month and emails.

And many interactions we have throughout the each month.

Welcome to the billing section.

Today I will cover the newest changes along with the new functionality in billing.

I will start with building tiles called building dashboard. Review of the building, work center and building navigation collection.

Then I will move to other building tiles and new functionality in copy single Bill.

And I will end with customer contracts for contacts, for paperless, paperless invoices.

Month and e-mail reminders.

I'm guessing your favorite and information about billing interfaces.

This is a billing dashboard with six tiles.

1st 2 tiles are a one stop shop tiles where core city building users will have access to most frequently used pages and these are as you can see billing work center and billing navigation collection.

The second tile billing navigation collection is a brand new tile.

We don't have it today.

In our current version of core.

Next 4 tiles are shortcuts to common functionality and these are create customer information. Create customer contacts, standard building and finalize and print invoices.
Work center pile is a one stop place to all daily weekly billing needs for you.
For billing users, existing functionality has been engineered to.
Work Center was set up this way that most of your daily and weekly billing processes could be done from here without a need to navigate to individual core pages.
Building work Centre gives users quick access and provides an overview and status.
To some of your billing transactions.
Next slide please.
This is our billing work center.
We still have 4 main sections there, the same as today, all on the left side of the navigation and these are my work links queries with queries, report and processes.
Sections and sub sections can collapse and expand.
Core user can hide show left side navigation to create more workspace if needed.
Are continuing here on this page with billing work center these four sections that I mentioned, my work links, queries, reports and processes should provide users with most, if not all, of your daily navigation pages.
They should give users access to all your daily or weekly most frequent processes and transactions.
Next slide please.

Reutter, Shanon M 54:43
Some technical difficulty hang on one second.

Kowalewska, Agnieszka 54:44
It's OK, don't worry. Don't worry, don't worry.
Just take your time.
Same as today, 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 you are seeing them in the top left.
And we have seven of them.
There is a personalized button at the left upper corner of the billing Work center page.
You see this highlighted in green here on this page.

And we move to a next slide please.
Core user needs to choose edit filters, then choose business units or multiple business unit or multiple business units.
That you have access to and click done twice. You actually have those.
2.
To push buttons highlighted here in red.
You should.
Can you go back a little bit?
Thank you so much.
Mm hmm. 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.
Here you have equal and then the operator just chose 111 business unit.
If you have multiple access to multiple business units, you need to use a different operator which is called in in user can edit billing work center filters as many times as needed and adjust them according to the needs. And very important information on this page.
Which is called edit filter, personalize. You can see that there are 7 reports or links on the left side.
In this section called current work in the billing Work center or links.
Filters to be set up, but the good news is that core user needs to set up building filter only for the first link.
Here it is for invoices not finalized.
Highlighted in yellow once filter is set up for the first link or the report, it will be applied to all 7 available to you in the billing work center.
Next slide please.
Summarizing the billing work center.
Billing work Center is one place to go for you for your daily billing processes and status of your transactions.
It is to be used instead of navigating manually to individual billing core pages.
Next slide please.
In other links section in the billing work Center, users will see access to supporting documentation as well as customer general information.
This is a page where you create a new customer or edit existing customer and customer contacts information and this is the place where you assign an e-mail address for your customers.

Supporting documentation page applies to an invoice and it allows a billing module user to either review supporting documents.
Or view add and delete them if needed.
Speech.
Reports processes section.
Of the billing work center, there is access to most frequently billing processes and reports.
Use the example that I'm providing on the slide is a performer invoice page.
This is probably a page that most of you.
With access to billing module use very very use weekly if not really daily. Under my processes core users.
Will also have access to other frequent billing processes, and these are the following finalize and print invoices.
Reprint invoices create installment bills.
Create recurring bills, change status of bills and delete cancel bills.
Now we are moving to billing, navigation collection, billing, navigation. Collection tile is a brand new tile in billing.
Next slide please.
Building navigation collection.
Is a customer an invoice based tile which is grouping the most frequent processes for a customer and invoices.
It has four sections as you can see on the left side of this page and these are my customers.
My billing invoices my accounting.
And then my reports and analysis.
Next slide please.
On this slide I'm presenting the example of the report in building navigation collection tile.
In my accounting section, it's called review entries by invoice. As you can see this page, or rather report has few sub pages. We call them tabs.
Where user can see different information about any chosen invoice and on the slide you actually see.
The fund department.
Sid and account how it has been coded.
Other for billing tiles on the billing dashboards.

These are most popular and frequently used by core billing users.
And these are create customer information.
This is the place where you create or edit existing customer. Then create customer contacts.
This is the place for paperless invoicing when you will assign.
An e-mail to existing customer standard billing where you create invoices and finalize and print invoices.
To finalize an invoice or multiple invoices at the same time.
Next slide please.
Finally, the new functionality in billing module.
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 we are able to create one copy at a time.
Any upgraded core you will be able to create multiple bills as a copy of an existing bill.
And I will go through the steps how to create a copy single bills as presented on the slide.
So you go to the page, copy single bill.
A user selects copy bill.
Then select number of copies required here on the page I'm presenting 3 different copies. After this is done, it saves to proceed and create copy or multiple copies of the given invoice.
In this slide, we will be creating 3 new copies from one invoice.
Next slide please.
Customer contacts for paperless invoices.
This slide is just a reminder about already existing functionality.
For billing module it is not new functionality but the existing one.
It is tying the customer contact to existing customer ID.
This allows agency to send invoices via e-mail to its customers when customer contact is set up.
An e-mail is entered.
On the slide to the right.
On the maintain contacts page you have a place where customer address can be set up and entered, and you're seeing that this is being entered here.

Additionally, the new functionality that Chris spoke about, like sending customer statements and Downing letters via e-mail that is available in upgraded core, also requires customer contacts set up.
So if your agency doesn't have it or is not using this currently, please reach out to us.
The opening by opening the Help Desk ticket and will guide you through the process.
Next slide.
I am sure that these are your favorite emails or one of your most favorites.
You receive them every single month, either from myself or Chris, and I would like to let you know that AR and billing month and closing e-mail will be sent as usual the last day of each month.
AR and BI modules closing will happen on 4th Business day.
Of the month for the prior month and it's exactly the same and nothing is changing here.
Next slide please.
You received few questions from various agencies whether there are any changes to Boeing interfaces and how it will work in the upgraded core.
Building interfaces will work as usual. There are no changes to the process for agencies and for us in core CT team, the key agency contacts will be notified via e-mail if there are any issues to be resolved and their input or action is required. As I am doing.
This right now every single morning.
The agencies are being contacted if we have any issues with the interfaces and I listed for you here a few agencies that with existing building interfaces and these are the agencies that I'm contacting or myself or Chris, if there are any issues.
So these this is BORCC which is state Community College system chief medical examiner's office.
Das, one of the smart two of the smart agencies Department of Administration services.
Department of Transportation, Department of Public Health and Department of Emergency Services and public protections.
Time open for any questions that you might have for me or Chris.

KD **Klaben, Dianna** 1:05:50

There are a couple questions in the chat.
The first one is will editing one of the filters after initial setup change all 7 reports.

Kowalewska, Agnieszka 1:06:00
Well, when you will, when you will go there for the very first time, it works exactly the same way as today because many of the agencies, many of the users that I know they have been using building work center already.
So yes, when you will go there, you will have to set up the filter and once you will set up the filter and click done twice, you will see that the reports will be refreshed and then you will see number of transactions in those reports.
On the left side and there are 7 reports exactly the same as today.

Klaben, Dianna 1:06:37
Thank you, Agnes.
Another question is what if you have multiple locations for a single vendor?

Kowalewska, Agnieszka 1:06:44
Multiple location for a single vendor.
So you mean that you would like to assign?
A few different few different addresses, or few different or few different.
E-mail addresses or a few different locations? Physical locations.
It's possible.
We have them right now, so we have for example, we have to name those locations.
So we name those location as number one, number two, number three or main.
And whatever the other locations are, there is a place to do it in core currently.

Klaben, Dianna 1:07:23
Another question is can you use the copy feature?

Kowalewska, Agnieszka 1:07:29
Single I I probably need that clarification on this. I am hoping that this applies to the slide that that the feature that I have been presenting.
Is this the question about copy single Bill?
This is yes, it will be available.

Klaben, Dianna 1:07:52
Another question is, do we still go into report manager to print and save the Bills?

Kowalewska, Agnieszka 1:07:57
Yes, you go.
There, it's exactly the same place and we placed the report manager link for you.
In actually in in billing work center and in accounts receivable work center. So you will have access to this place from both work centers.

Klaben, Dianna 1:08:20
Another question is, are we going to lose all of our currently saved core reports and have to start all over again?

Kowalewska, Agnieszka 1:08:27
No, no you don't.
No you don't.
You will have everything as you've had before.

Klaben, Dianna 1:08:39
It for questions for now.

Kowalewska, Agnieszka 1:08:45
If this is everything, then I'm handing over the presentation to Jim Klaben and he will talk about GL module.
Thank you very much.

Klaben, James 1:08:57
Hello so I am Jim Klaben.
I'm the GL module lead on the core CT team. We will.
Start the GL slides with a overview of the GL agenda.
Here you can see bullet points. All the major changes that were happening with the upgrade.
The first thing is the GL dashboard. We'll take a look at that.
That's brand new.

The work Centre is basically the same as before.
It's going to look new.
Couple more links on it, followed by structure requests.
This is brand new.
This is replacing chart for the request and we'll take a look at how approvals work.
And the law of notifications, and also finally a new chart field value called chart.
3.
So first slide. So this is the brand new GL dashboard.
As with prior modules, you're going to see look similar.
It has tiles 2 the major tiles to point out are approvals and structure requests.
So these house will bring you to the new pages which are covered in the following slides.
Take a quick look at the GL work Centre again.
Same menu options but different format.
Notice the structure request link in red.
So this is brand new.
This will bring you to the structure request page.
There's still the chart for request for archive request.
Once the upgrade is live, the you will no longer be able to submit chart requests in the old format.
You'll have to reuse structure request.
So this slide is giving me a bunch of information on structure requests again.
It's replacing the chart for the request pages.
It's the same exact questions you have to fill out the same information, just looks new and different buttons. So the old chart field request is no longer supported.
Structure Request uses a new fluid layout.
Same as information is needed. Like I said before, so you'll go through the same questions and the approvals are all done through your approval tile on the GL KK dashboard.
Any current offer requests in queue need be completed by.
Go live so.
Once that happens, you ought to submit a request using the structure request format.
No, this slide, we're taking a look at specifically on the left side, the you're going to see is the GL and KK dashboard with the structure request tile in red and once you

click on that tile, it will bring you to the financial structure request page on the.
Right.
You have different filter criteria you can filter on and there's also the main button.
Here is the add button which will allow you to submit a new structure request.
So.
Go to the next slide.
So like I said before.
Contains all the same general information. You have the char field request for the requester, e-mail address, phone comments, and request reason. Attachments are also available. Each main request can have multiple request lines.
This is the biggest change between the chart for request and the structure request.
A structure request you can actually submit.
By request, in the main request.
For example, if you have five department I DS and you need a request five of them, you can do on one main request and have multiple lines, one line for each partner ID.
Clicking on the request Detail button brings you to the detail line selected which will be.
The next line.
Each request will require the same information. Like I said before.
Looking at these screenshots on the left, so you have request assignment or information visits justification.
Clicking on each tabbed link will bring you to that page and fill out that required information.
The next slide we'll go to look at the approvals.
So structure requests and journal approvals, which are the accrual journals will show under the approvals tile. So looking at the screenshot, again this is the Geo and KK dashboard.
The approvals tile in the Red Square. If you click on that just to give you a snippet on the right side of the slide, you're going to see pending approvals.
One tab is the journal entry and the next is structure request. If you have the commissions for this, you will see those. If you do not, they will not appear there.
Umm.
Approals can still be accessed through journal approvals menu under the GL navigation, just like they were before.
So here we are taking a look at notifications for approval and denials structure,

question approvals and projects and payroll account forms are all provide notifications for approval through the notifications bell and through e-mail.
So like before you received emails, you still continue to receive emails. But we also now have notifications through the bell.
On this slide.
So we're taking a quick look at some information for the new chart field value called chart field 3. To summarize this in the easy and compact way, a few views charfield 2 before charfield 3 will be the same, except that only central agencies will create chart field values.
You cannot create your own chart field.
Three values will be created by central agencies. So.
Just to give you some examples how these will, this will be used. It will be used.
On journal entries, purchase orders, bills, deposits.
Any coding corrections on journals?
It'll also be available through payroll, so you can have comma codes of stock flow three values.
And some examples for use include.
Any major disasters?
COVID.
Sports gambling, big major projects, or widespread affecting.
So that will bring us to the next and final slide for questions.
Field some questions that have come through.

KD **Klaben, Dianna** 1:15:52
Question our current Excel chart field request forms required for upload as an attachment for new structure request process.

Klaben, James 1:16:03
The attachments are not required. So like before you going to you going to have the attached excel sheet and the structure request to provide more detail if necessary.

KD **Klaben, Dianna** 1:16:17
There is another question.
Is anything changing in how we upload spreadsheet journals to the JL KK ledgers?

Klaben, James 1:16:24

Oh, these will remain the same.

There will be a new.

Addition to the tools, so Charter three will be available if that is needed and a spreadsheet upload.

But the tool it'll look, it's going to be the same exact tool, just with new charts 3 field down there.

Klaben, Dianna 1:16:47

Thank you.

Klaben, James 1:16:47

OK.

Klaben, Dianna 1:16:48

That's it for now for questions.

Klaben, James 1:16:52

Oh yeah, sorry.

Introduce the next slide. So we have Vanessa, who will be going over grants management.

Hoang, Vanessa 1:17:04

I'm Vanessa Huang and I am the grant management project costing and customer contract.

Lead for core CT.

And today we'll go over some new functionalities for grant management as well as some.

The same functions for grant as well.

So on the agenda we have the Grant fluid homepage, the approval.

Bill notification.

Navigation collections and the Grant work center.

So the grant home page.

The Grant home page provide grand users access to actionable tiles and grant

navigation collections and work center. This also shows you a quick count of the number of tasks that is due for your grant proposal approval.
And approval we have set up so that the agency user can create grant proposal and use the approval process either to approve or denied the proposal within the approval workflow.
This is also known as the A WE.
Or the approval workflow engine.
The approval can access the pending approval page by using the approval tile that is on the grant home page.
And the pending approval will provide a list of your pending grant proposal approval.
This is all based on your current security roles.
So on this page is the approval denial that you can use the fluid grant proposal approval, provide a convenient option for user to review, approve or deny the pending transactions. So when you click on pending approval line, it will take you to the approval page and us?
Can add comments to.
An approval action, but this is not required.
Then the approval will be routed to the next approver.
For denial, the transaction will require you to enter a comments and then once the denial is.
Saved. This will remove the proposal from the approval team.
So we have the bill notification.
This provide an alert or a change that occur on your grant proposal approval.
When display with the green dots does mean that you have a new notification that you have yet to review.
There are two notifications.
There are alerts and actions. The notification action shows the proposal approval actions.
Take once you have approved or deny the proposal, the item will clear from the list.
For the notification alerts.
This shows action that have been taken.
User will need to maintain this if you wanted to remove.
An item or a line from this list you can click the X on the right hand side and this will be clear from the list.

Also user can.
User will also receive an e-mail notification that you can click on the link which sent you to the pending approval page.
The navigation collection is a list of the most frequently used menus in the grant applications.
On the left hand side of the page is a list of components and on the right hand sides is will display the component that you selected on the left hand side so user can.
Alternate back and forth on both panel so they don't even have to exit or closing the NAV collection to complete the their daily work which is quite convenient.
Grant work center.
Grant Work Center is used to support user through the life cycle of the A contract and is enable user to access key transaction data and notification report and query related to the grants.
The Grand Work Center can.
You can have access through data for customer contract building receivable providing that you have the security role you can navigate.
To the Grand Work Center from the.
From the tile on the homepage.
So now I'm going to go through the project costing and customer contracts agenda.
Will be the project costing homepage the form configurations, the homepage for customer contract, NAP collections and Work Center.
Searching homepage provide many attributes to help user classify the projects in their business unit.
The project cost in homepage.
Is provide a quick access to frequently use functionalities.
Is allow user to access page use in performing an essential function such as review and approve form functionality.
Project Work Center navigation collection my project setup project.
Yeah.
K form configurations.
So there are many components that you can go through using the tiles on the home page or.
Using the.
The work center or the navigation collection, but this is one of the thing when a user earlier asked if you cannot find.

Find the.
A tile for you have to use it on a NAV bar navigation, so on the right hand side you find the you find an application to this page is the configurations. If you need to change.
Your configuration, such as the activity ID, source type reset, etcetera.
This is where you can navigate to. Is on the right hand side of the NAV bar menu.
Contract work center.
Is also include.
The contract work Center navigation collection.
My contract and contract general information page.
This is also a high frequency use.
Tiles that we have on this home page.
Nab collection the NAB the Navigation Collection provide an alternative manual navigation.
It's designed to group.
Pages that exist in separate part of the system together on one page.
So it's quite.
Efficient for you to complete tasks and it will reduce the number of tiles that is showing on the homepage and it's at the same time reduced.
Need for you to.
Search through the NAV bar to access pages.
So this so this will support user to complete tasks in more effective way.
Work center.
So the goal of the work center is to help end user become more efficiently accessing frequently used pages and pagelet.
And it's provide a central area for user to access key components.
This will enable you to access various page and keep multiple window opens while performing your daily task.
It's also reduce the need for you to remember paths.
To frequently use navigations.
Project Work Center provide tools to update project information across the business unit.
You can review your project status project team.
You run query reports and also monitor your processes in the work center.
As well as the.

Customer contract work center. You can review your contract for missing resets.
Expire contracts and also run reports and queries in the work center as well.
Hey, that will conclude my presentations.
Does anybody have any questions that I can address?

KD **Klaben, Dianna** 1:27:52
There are no questions at this time.

HV **Hoang, Vanessa** 1:27:55
Thank you.
And now I will turn this over to Wendy for EPM.

Reutter, Shanon M 1:28:03
Hang on, I do have a question.

KD **Klaben, Dianna** 1:28:04
I'm hanging on, yeah.

HV **Hoang, Vanessa** 1:28:06
Oh.

Reutter, Shanon M 1:28:06
If go ahead, Diana.

KD **Klaben, Dianna** 1:28:08
OK. Are we able to personalize the collections to our own most frequently used pages or are these centralized?

HV **Hoang, Vanessa** 1:28:20
I believe you can.
I do believe that you can customize your collections, yeah.

Braga, Donna 1:28:31
I don't.

I'm going to double check on that. The navigation collections are configured by core.

Yeah, right.

Hoang, Vanessa 1:28:36

Oh, I'm sorry. The work center. Sorry. Yeah, yeah.

Braga, Donna 1:28:39

The work center.

You can, but the navigation collections you cannot.

Hoang, Vanessa 1:28:43

Right.

Klaben, Dianna 1:28:45

Thank you.

There's one more question.

Are there changes to how?

Rate set configuration submitted such as C339.

Hoang, Vanessa 1:28:54

No, it's the same navigation.

It's just like I said, it's the new NAV bar menu that you have to go through to find the configuration form, but it's the same process.

Klaben, Dianna 1:29:10

Here's another question.

Will we have a query manager option?

Hoang, Vanessa 1:29:16

Uh query manager is the same as before.

You have the query manager to go in and look at your reports and queries.

Klaben, Dianna 1:29:30

Thank you, Vanessa.

That is it for now.

Hoang, Vanessa 1:29:33
Thanks.

Monk, Wendy 1:29:36
Good morning.

Hoang, Vanessa 1:29:36
OK.
So I'll pass this on to Wendy. Sorry.

Monk, Wendy 1:29:39
Thank you, Vanessa. Good morning.
I'm Wendy Monk for APM and stars. We're going to just talk about the EPM and stars starting with the EPM navigation.
The EPM pump favorites and stars navigation.
CPM Navigation will be on the navigation bar to the right of the new system.
You'll go to menu core C, T, E P M reporting tools query manager.
And again, as mentioned before, with Briana, you can also add it to your favorites, even alphabetically using the setting tool.
One controls will not be deleted.
Pre scheduled reports or queries will have to be rescheduled.
Private queries will not be deleted.
Epm query favorites will be erased.
You will need.
To look at all of your favorites right now.
Notate them and replace them into your favorites. When prom goes live.
Stars navigation. They'll have a tile on the left hand side.
Navigation. You'll see the core C TH RMS, the help, the news, my reports and then stars navigation. Little tile will be right there.
Does anyone have any questions regarding EPM or stars?

Klaben, Dianna 1:31:17
No questions so far.

Monk, Wendy 1:31:19

Thank you.

Guarino, Dustin 1:31:27

Hi, good morning.

My name's Dustin Guarino.

I'm going to go over the security with you quickly. And lucky for you this is 1 slide.

So we're going to get through this.

So for security, excuse me, new a new financial security tile will be available for those users that have security roles.

So if you're a liaison or a approving manager, it can be found by selecting the core CT financials homepage from the drop down menu.

Here users assign the CTCO 1092 liaison role can access the Co 1092 security request tile to create Co 1092's. The users assigned the CTCO 1092 approving manager role will be able to access the manager approvals tile to approve the.

Co 1092's at the agency level and then for those.

Few users with DAS and OSC. They'll be able to access the security approvals tile to approve from there.

When you get to these pages themselves, there's no changes.

So it's really just this navigation to get to them using the tiles.

You'll still receive emails when it's your turn to approve.

So if you have any questions.

If not, we'll pass this over to Shannon.

Klaben, Dianna 1:32:53

No questions.

Reutter, Shanon M 1:32:57

Morning. I'm Shannon Reutter with the Core-CT help desk.

Today I'm going to go over footprints of corset web page wearing cache and browser information and lastly reminders.

We encourage everyone to log a ticket.

Help desk answers the tickets as quickly as possible. When the tickets are submitted, keep an eye out for emails when you have a ticket open.

Hope Desk will communicate through the ticket. You can respond to the e-mail.
And footprints will attach your response to the e-mail.
And notify the help desk staff that you have responded.
Prints tickets are routed directly to the team that handles the module for faster processing.
You are in need of footprints, access and e-mail the readiness mailbox with the subject footprints access and we will grant you access.
The readiness mailbox. If you have an e-mail address that does not end in ct.gov, you can e-mail the readiness mailbox directly to the help desk to create a footprints ticket on your behalf.
What was the help desk does create a ticket on your behalf.
Again, please watch for emails from footprints, even though you don't have access to footprints directly, you can respond to the e-mail, and again, that will attach it to the ticket and allow the help desk to be notified that you have responded.
To the ticket.
And please refrain from reaching out to the module leads because we will need to document every issue that comes in after this.
Period.
Core CT modernization page is where you'll find all of the decks from previous change agent meetings, along with recordings, transcripts, and Q and as.
There is a link for the course et pom upgrade training registration page that contains all 100 classes.
In all previous classes and recordings, manuscripts that were from any class, including this presentation, it will also be posted there.
E-learning modules that are posted here are 10 to 15 minute training modules that can be viewed at any time at your own pace, and the steps can be saved as a pdf for your own reference.
L200 courses are also listed here.
Which are the ones that your instructor led trainings rerecording, transcript, and Q and as are there as well?
There's also a new link on the core modernization page for our upgrade training and support page.
Here you'll find infographics which are one page documents recap, cross module topics such as navigation and approvals.
You'll also find job aides, which are the printable documents outlining the business

process and steps within core.
Again, the e-learning modules will also be posted here.
And the L200 courses are also closed.
It's important to clear your browser cache, especially when logging into Core-CT for the first time.
After the upgrade, you'll also need to clear your cache anytime something looks a little different.
You know, the help desk will ask you if you have cleared your browser cache before.
We try to troubleshoot what's going on with your issues.
Yes.
If you are having any browser problems, you can also use a new window with Incognito mode.
Try browsing in a private window in Microsoft Edge.
Just a few reminders. Favorites will not carry over with the upgrade, so take screenshots. Write them down.
Do whatever you have to do so you don't forget which pages you saved as favorites.
Your run controls will carry over with the upgrade to worry about those.
Punch scheduled reports and queries will need to be rescheduled as Wendy mentioned.
Also, something very important is all devices must have an up to date browser properly accessed core CT.
Especially since we are fluid and using mobile devices.
Device operating systems, software, apps all must be up to date. If a manufacturer stops supporting a device, then it won't be able to be updated and therefore will not be able to be used for CT.
That concludes my section.
Are there any questions?

KD **Klaben, Dianna** 1:37:49
Questions at this time.

Reutter, Shanon M 1:37:53
OK. Then we're going to move on to the closing with Brianne.

McKenna, Brianne 1:37:58

Hey. Well, thank you everyone for your participation today and we hope that this information has proved helpful.
It's very, very important that you take this information and you share it with your colleagues and Co workers.
Also, as mentioned earlier today in the meeting, Donna said that we will be posting this with the transcript and the recording, which will also be very beneficial for you.
Do we have any final questions?
Thanks for the applause.
Everyone did great.
Great questions as well. Thank you.

KD **Klaben, Dianna** 1:38:37
No questions.
Oh wait, there is.
One is my links the same as favorites will not be carried over.

McKenna, Brianne 1:38:50
Shannon, do you have?

Reutter, Shanon M 1:38:56
Here is my link store OK Donna.

Braga, Donna 1:38:56
Yes, yeah my links is like favorites.
That's not going to be carried over.

McKenna, Brianne 1:39:00
Correct, correct.
So take your screenshots and then you can just add them back when the system comes back up on the 25th.
Questions.

KD **Klaben, Dianna** 1:39:14
Another question, will my folders and stars be carried over?

McKenna, Brianne 1:39:20

Star's question.

I believe they will be, but I. Donna, do you have an answer for that?

Braga, Donna 1:39:30

Nothing has changed, you said stars.

McKenna, Brianne 1:39:32

Yeah.

Braga, Donna 1:39:33

Nothing's changing in stars, just the navigation.

Klaben, Dianna 1:39:51

More questions?

McKenna, Brianne 1:39:53

Well, I think this concludes the meeting. Thank you again.

And good luck we look forward to hearing from you.

Klaben, Dianna 1:40:03

There is one more question.

Do you know if incomplete E pros will carry over or will you have to recreate those requests?

McKenna, Brianne 1:40:14

I do not think you have to recreate him, but we do have the E Pro.

Presentation this afternoon.

I would encourage you to ask that question there.

Klaben, Dianna 1:40:39

Is it for questions?

Braga, Donna 1:40:43

Incomplete requisitions. They will still be in the system. You won't have to recreate them.

McKenna, Brianne 1:40:50

They will carry over.

Braga, Donna 1:40:50

Just have to make sure if there's approvals. If it doesn't hit your notifications list, just approvers need to check their approval page to see if there's anything out there for approval.

And if you're interested in requisitions and E procurement, too, there's the afternoon session which will go into more detail with that, OK.

Reutter, Shanon M 1:41:21

Here's one more question.

Will Ceec report be carried over?

Braga, Donna 1:41:29

I'm not sure what report that is specifically, I don't know of any reporting course specifically with that name.

It could be a query that you're referring to, but we're not deleting any queries.

We're not deleting any reports and we're not deleting any run controls.

So it's just your favorites for navigation because the navigation has changed so much, you're going to have to re add favorites to navigate to your favorite pages.

OK.

That's really all you're going to be losing.

The only other thing that we're concerned with is now that we're getting rid of the work list and you're going to see things in the notifications bell.

Just you know approvers, check your approvals page to make sure you're seeing everything that you need to approve in case it was in flight when we upgraded the system.

And as far as Windows.

Core CT, it says.

If you have Windows 10 and not 11 yet, will that be an issue?

I couldn't tell you.

They're really well. This is not a tools upgrade.
So if Windows 10 is still working for you today, it should still work for you tomorrow.
This is change is really what's inside the application, although we we tend to support the most recent versions of Windows with PeopleSoft.
So.
Hope that answers your question.
There shouldn't be a change to that.

Reutter, Shanon M 1:42:56
And there's one more question about EPM.
Will EPM queries be available for payroll?

Braga, Donna 1:43:03
Not when the system is down.
Nothing will be available when the system is down, although yeah, you may be able to access stars.
Remote like through just getting to stars but I can't help you with that.
That'll that would have to be a question for the Stars support box.
But the system will be going down Thursday at noon and it will be coming back up on Monday and EPM financials. HRC RM, they will all be.
Unavailable.

Reutter, Shanon M 1:43:45
OK, that looks like that's it for questions.

McKenna, Brianne 1:43:50
This concludes our meeting.
We squeeze one in there, then it looks like there might be another one.
OK.

Reutter, Shanon M 1:44:04
Just to thank you.

McKenna, Brianne 1:44:06
OK.

Great. Thank you.
This concludes our meeting.
Take care everyone.
Happy holidays.

◉ **Reutter, Shanon M** stopped transcription