



# Core-CT FIN PUM Delta User Group

ePro/PO/Pcard/AP/AM/SCM/BW

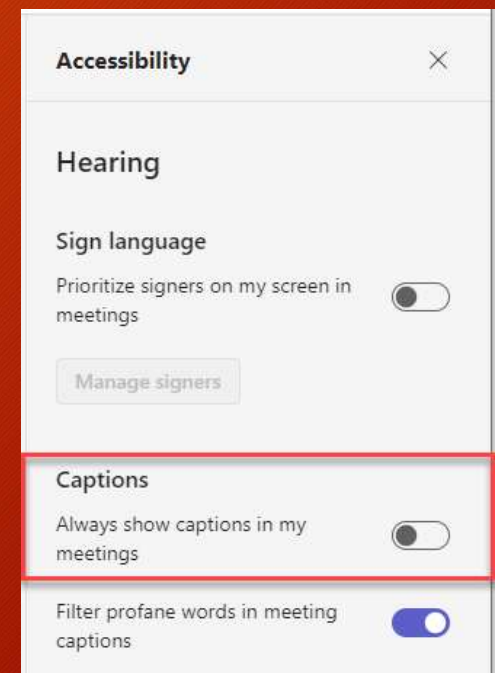
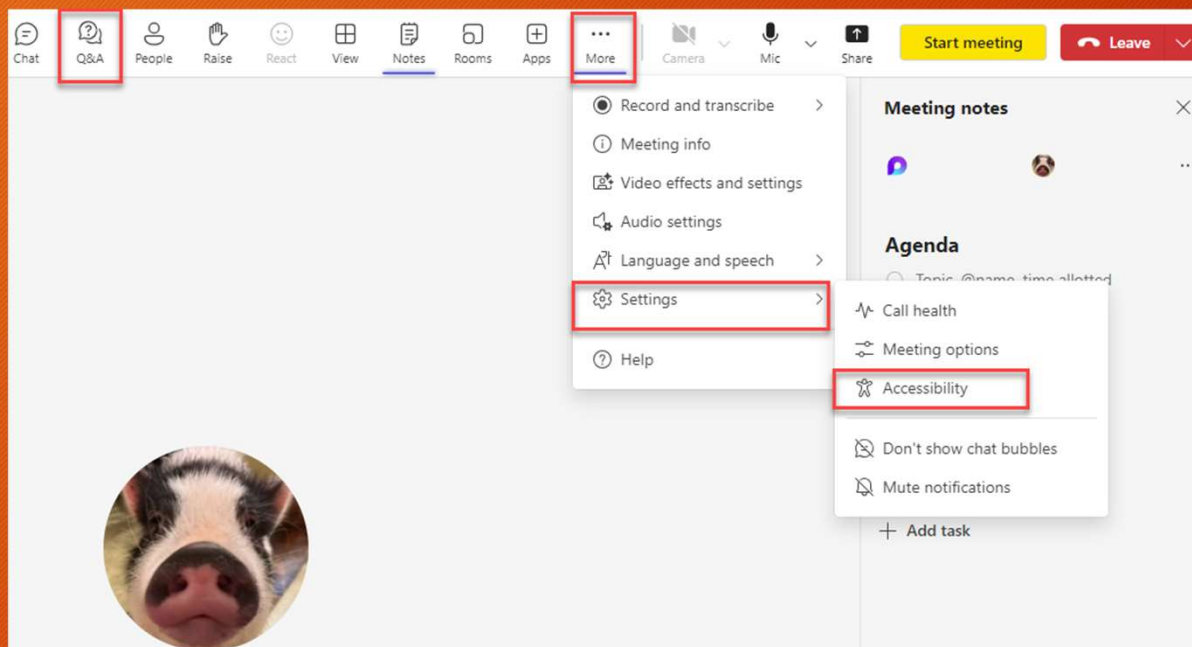
November 19, 2024

# 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.



# Welcome

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



# Agenda

- Welcome
- Navigation & Approvals
- ePro
- PO
- PCard
- SCM/BW
- AP
- AM
- EPM/STARS
- Security
- Help Desk
- Closing

Donna Braga  
Brianna McKenna  
Maty Bello-Persson  
Michele Richmond  
Brian Guilmartin  
Brian Guilmartin  
Michael Virone  
Scott Przygocki  
Wendy Monk  
Dustin Guarino  
Shanon Reutter  
Brianna McKenna

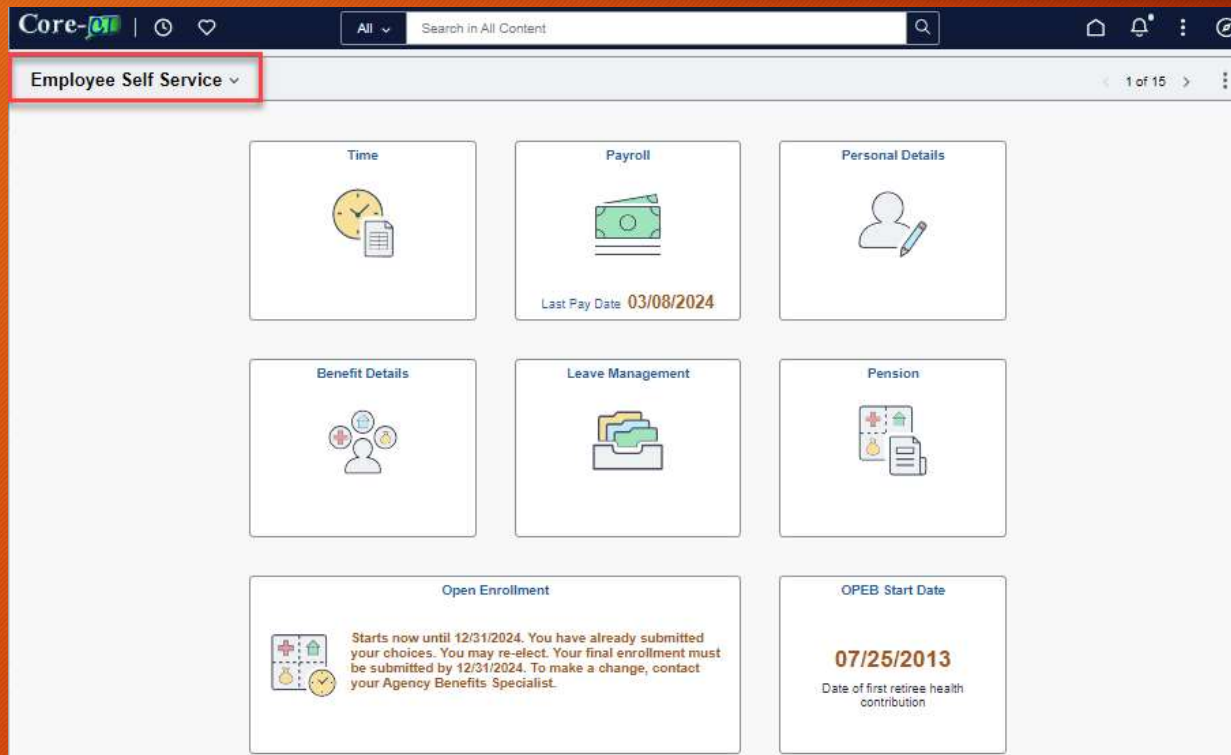


# Navigation Agenda

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



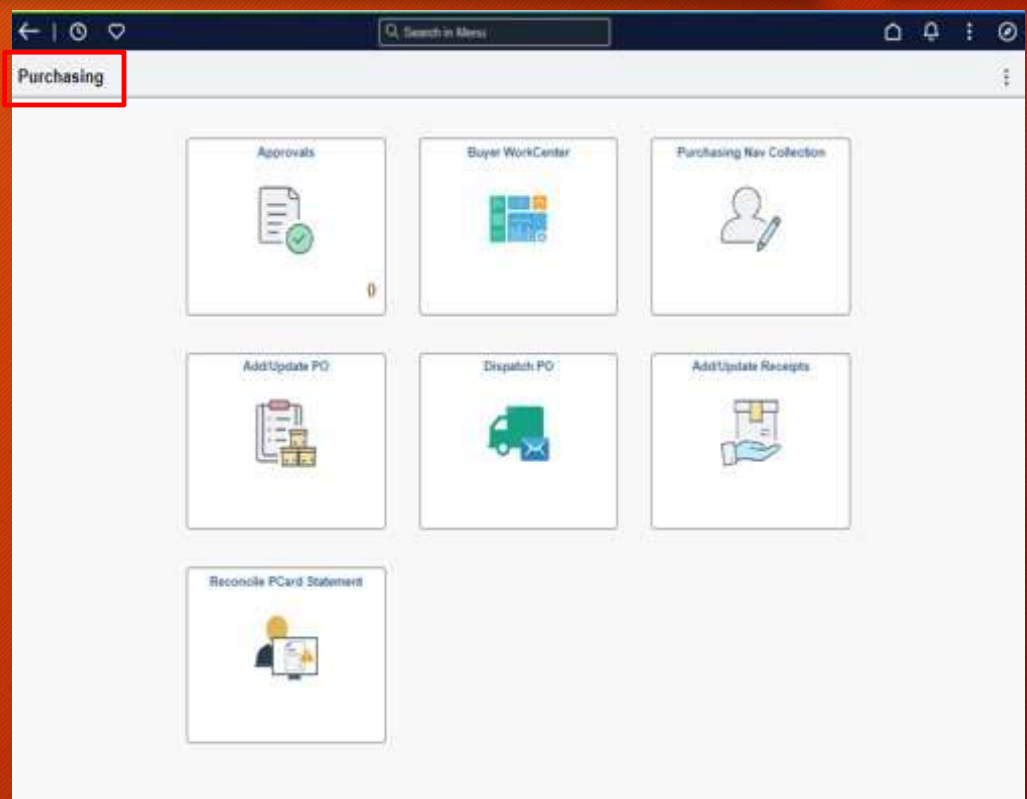
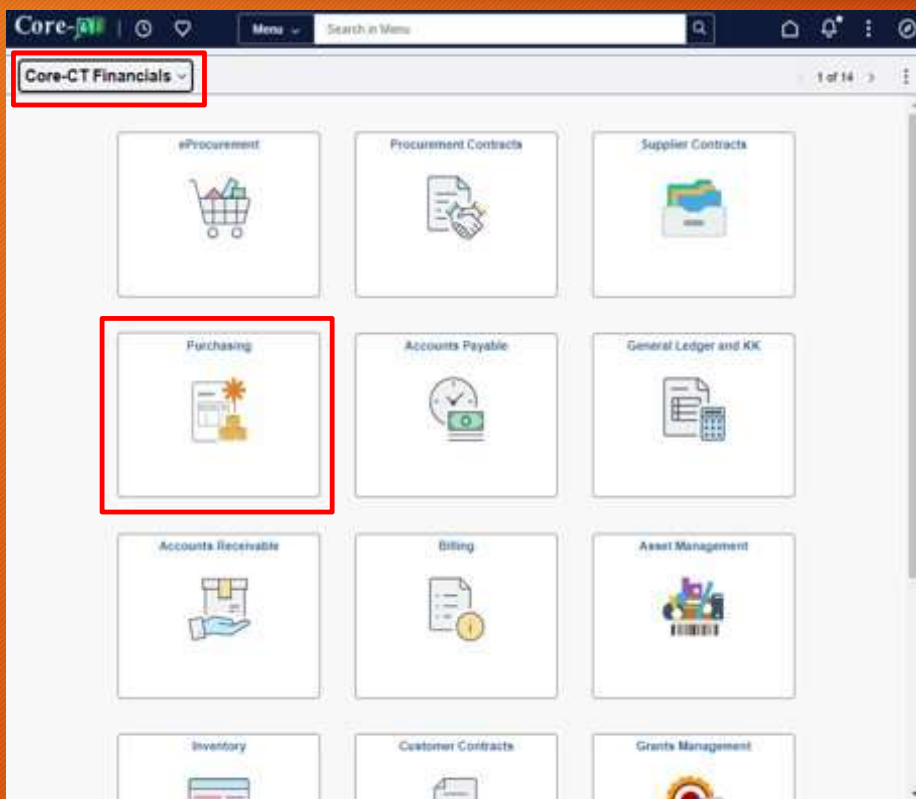
# Navigation - Home Page



The screenshot displays the Core-OT Employee Self Service Home Page. The interface includes a top navigation bar with the Core-OT logo, a search bar, and utility icons. A secondary navigation bar contains the 'Employee Self Service' menu, which is highlighted with a red box. The main content area is organized into a grid of service tiles:

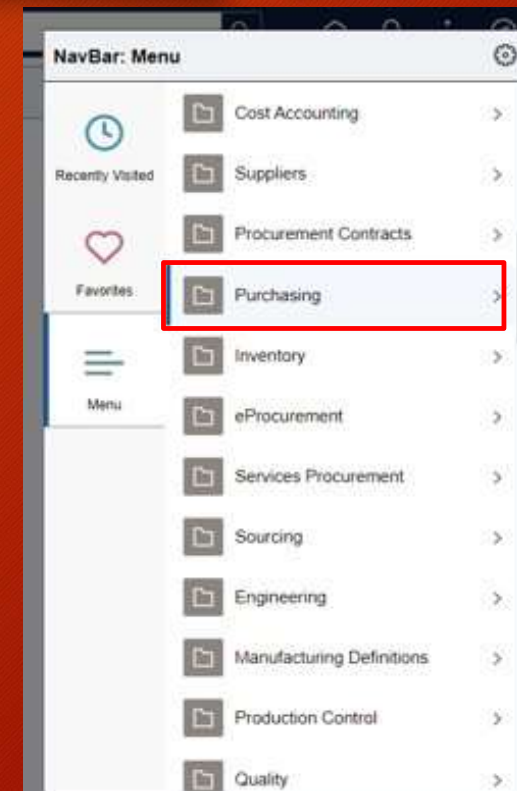
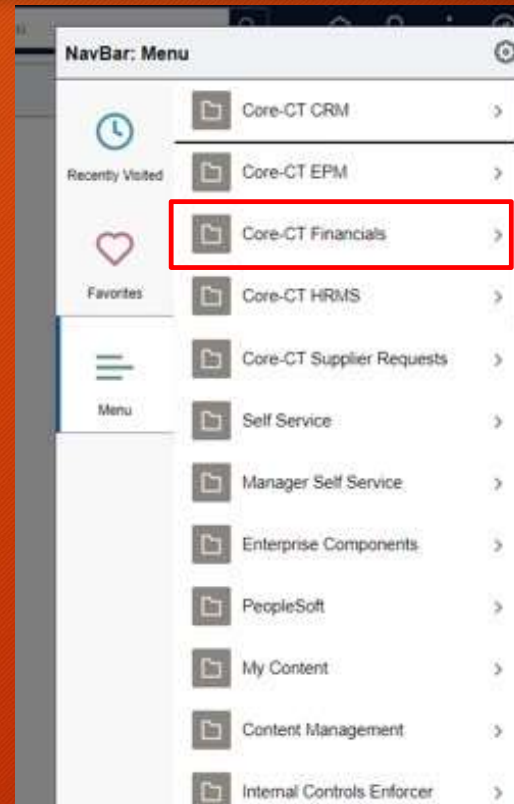
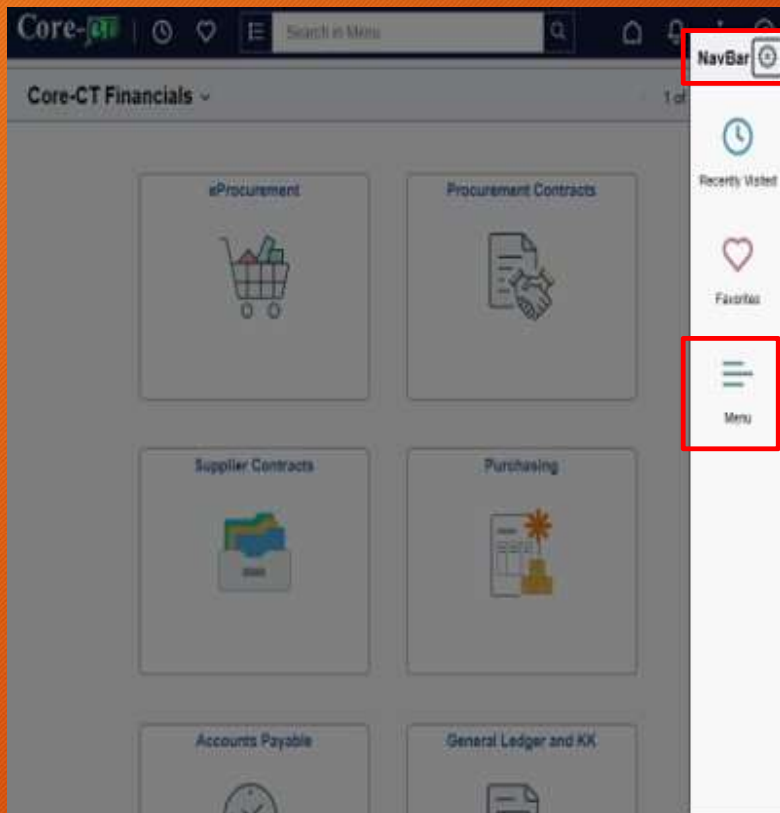
- Time**: Represented by a clock icon.
- Payroll**: Represented by a stack of money icon, with the text 'Last Pay Date 03/08/2024' below it.
- Personal Details**: Represented by a person icon with a pencil.
- Benefit Details**: Represented by a person icon with three colored circles.
- Leave Management**: Represented by a folder icon.
- Pension**: Represented by a person icon with a dollar sign and a document.
- Open Enrollment**: A larger tile with a grid icon containing a plus sign, a house, a dollar sign, and a clock. The text reads: 'Starts now until 12/31/2024. You have already submitted your choices. You may re-elect. Your final enrollment must be submitted by 12/31/2024. To make a change, contact your Agency Benefits Specialist.'
- OPEB Start Date**: A tile with the date '07/25/2013' and the text 'Date of first retiree health contribution' below it.

# Navigation - Tiles

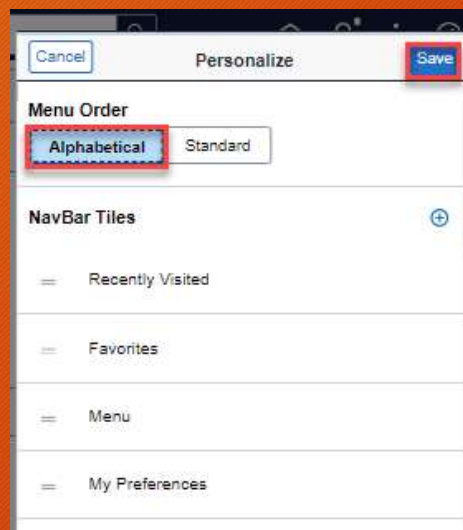
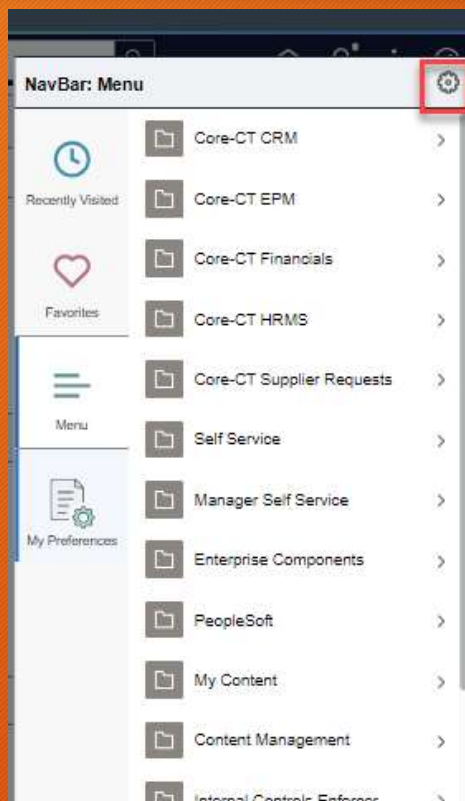




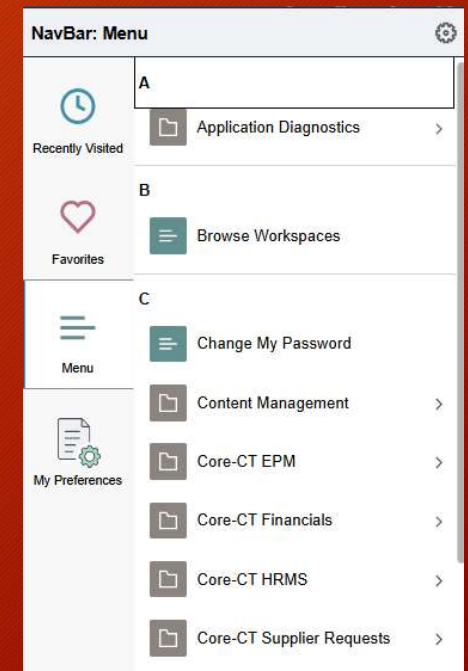
# Navigation - Nav Bar Menu



# Nav Bar Menu - Alphabetize

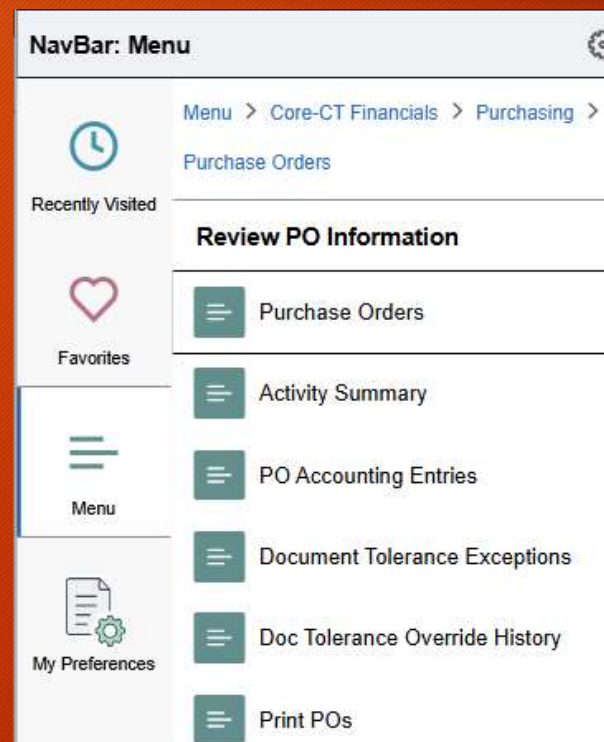


- Click the settings icon
- Click Alphabetical
- Click Save



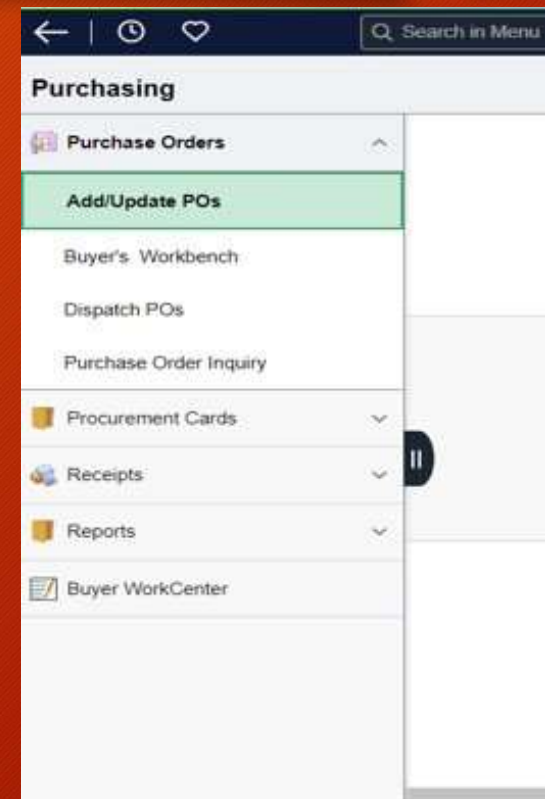
# Nav Bar Menu - Bread Crumbs

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



# Navigation - Collections

- Collections is another way of navigating.
- The Collection menu lists the most used functions in a particular module.
- Collections is compared to the currently used WorkCenters.



# 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 and Security.



# Approvals - Fluid

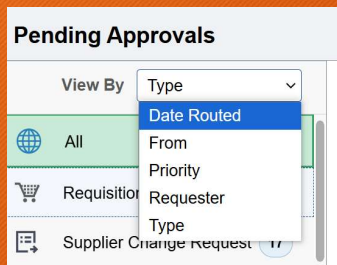
- This is the Pending Approvals page that the previous tile brings you to.

The screenshot displays the 'Pending Approvals' page. On the left, there is a sidebar with a 'View By' dropdown set to 'Type'. Below it are three filter buttons: 'All' (42 items), 'Purchase Order' (8 items), and 'Requisition' (34 items). The main content area shows a list of approvals under the 'All' filter. The list has 42 rows. The highlighted row is a Requisition for 6.00 USD, with the description 'ECDM1 / 0000002362 / ECD-Flanagan Jessica R / TEST HOLD BUTTON#2', vendor 'GRAINGER INDUSTRIAL SUPPLY', and status 'Routed' on 07/12/2024. Other rows include a Purchase Order for 1,932,730.00 USD and another Purchase Order for 30.00 USD.

Type	Description	Vendor	Amount	Status	Date
Purchase Order	ECDM1 / 0000022161 / ECD-Flanagan Jessica R / STWM FY24- Marketing Services	ADAMS & KNIGHT INC	1,932,730.00 USD	Routed	06/10/2024
Requisition	ECDM1 / 0000002354 / ECD-Flanagan Jessica R / multi dist %	GRAINGER INDUSTRIAL SUPPLY	4,600.00 USD	Routed	07/11/2024
Requisition	ECDM1 / 0000002362 / ECD-Flanagan Jessica R / TEST HOLD BUTTON#2	GRAINGER INDUSTRIAL SUPPLY	6.00 USD	Routed	07/12/2024
Purchase Order	ECDM1 / 0000022449 / ECD-Flanagan Jessica R	GRAINGER INDUSTRIAL SUPPLY	30.00 USD	Routed	07/18/2024

# Approvals - Fluid

- Approvers can use the filter options to narrow down their list when looking for a specific transaction to approve.



A screenshot of the 'Pending Approvals' main interface. The 'All' filter button is highlighted with a red box. A 'Filters' dialog box is open, showing a 'Purchase Order' type and a 'Requester' of 'ECD-Flanagan Jessica R'. The 'Filter' button in the dialog is also highlighted with a red box. A yellow arrow points from the 'All' button to a text box, and a red arrow points from the text box to the 'Filters' dialog.

The approver can use the filter to narrow down and find the PO they are looking for to approve, by selecting any of these fields.

Type	Requester	From	Date Period	Priority	Routed Date From	Routed Date To
Purchase Order	ECD-Flanagan Jessica R					
Purchase Order	ECD-Flanagan Jessica R					



# Approvals - Fluid

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

The screenshot shows the Oracle Approvals interface. At the top right, a search bar contains the number '23494'. A red box highlights this search bar, and a red arrow points from a text box to it. The text box contains the instruction: 'Click Control F, to find a specific PO. The PO will be highlighted Orange.' Below the search bar, the 'Pending Approvals' section is visible. It includes a 'View By' dropdown set to 'Type' and a list of filters: 'All' (selected) and 'Purchase Order'. The main table displays two purchase orders. The first row is highlighted in orange, corresponding to the search criteria. The second row is not highlighted.

Amount	Item	Supplier	Approval Limit
10.00 USD	ECDM1 / 0000023494 / ECD-Flanagan Jessica R / UAT TESTING	SUBURBAN STATIONERS INC	PO Amt Approver Less than \$10K
1,344,344.00 USD	ECDM1 / 0000023475 / ECD-Flanagan Jessica R / FY25 STWM	ADAMS & KNIGHT INC	PO Amt Approver Less than \$10K

# 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.

The screenshot displays a mobile application interface for requisition management. The main screen shows a requisition for "Northern Tait Radios 5" with a value of 10,216.05 USD. A "More" button is highlighted, showing a dropdown menu with options: "Pushback", "Hold", and "Request Information". Two modal windows are shown: "Deny" and "Approve", both with "Submit" buttons and a text area for "Approver Comments".

**Requisition Summary:**

Business Unit: DOCM1	Requisition ID: 000059535	Obligation Amount: 10216.05
Routed Date: May 22, 2014	Requisition Date: May 22, 2014	Oblig Start: 05/22/2014
Requester: DOC-DBias Timothy J	Entered by: DOC-DBias Timothy J	Oblig End: 08/30/2014

**Deny Modal:**

Requisition ID: 000059535

Cancel Deny Submit

You are about to deny this request.

Approver Comments

**Approve Modal:**

Requisition ID: 000059535

Cancel Approve Submit

You are about to approve this request.

Approver Comments

**More Menu:**

Approve Deny More

Pushback

Hold

Request Information

# Notifications - Bell

- Approvals can also be managed via the Notification Bell.



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### Pending Approvals

View By: Type

- All (5)
- Purchase Order (1)
- Requisition (4)

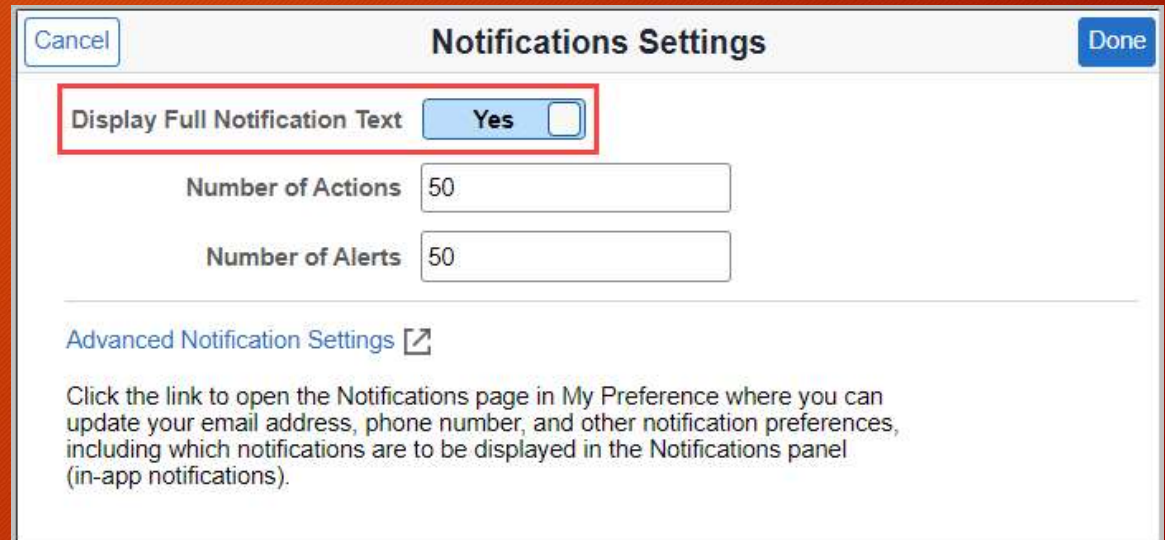
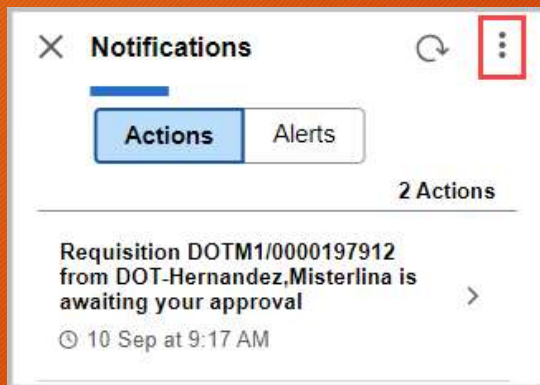
**All**

5 rows

Requisition 1.00 USD	DOTM1 / 0000197909 / DOT-Hernandez,Misterlina / 0000197909	ACCENTURE LLP	Req Budget Approver	Routed 08/26/2024	>
Requisition 1.00 USD	DOTM1 / 0000197912 / DOT-Hernandez,Misterlina / TEST NOTIFY	ACCENTURE LLP	Req Amount Approver 1	Routed 09/10/2024	>

# Notifications - Settings

- Set Display Full Notification Text to Yes
  - This needs to be done once



# 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.



# Questions...



# eProcurement

Maty Bello-Persson

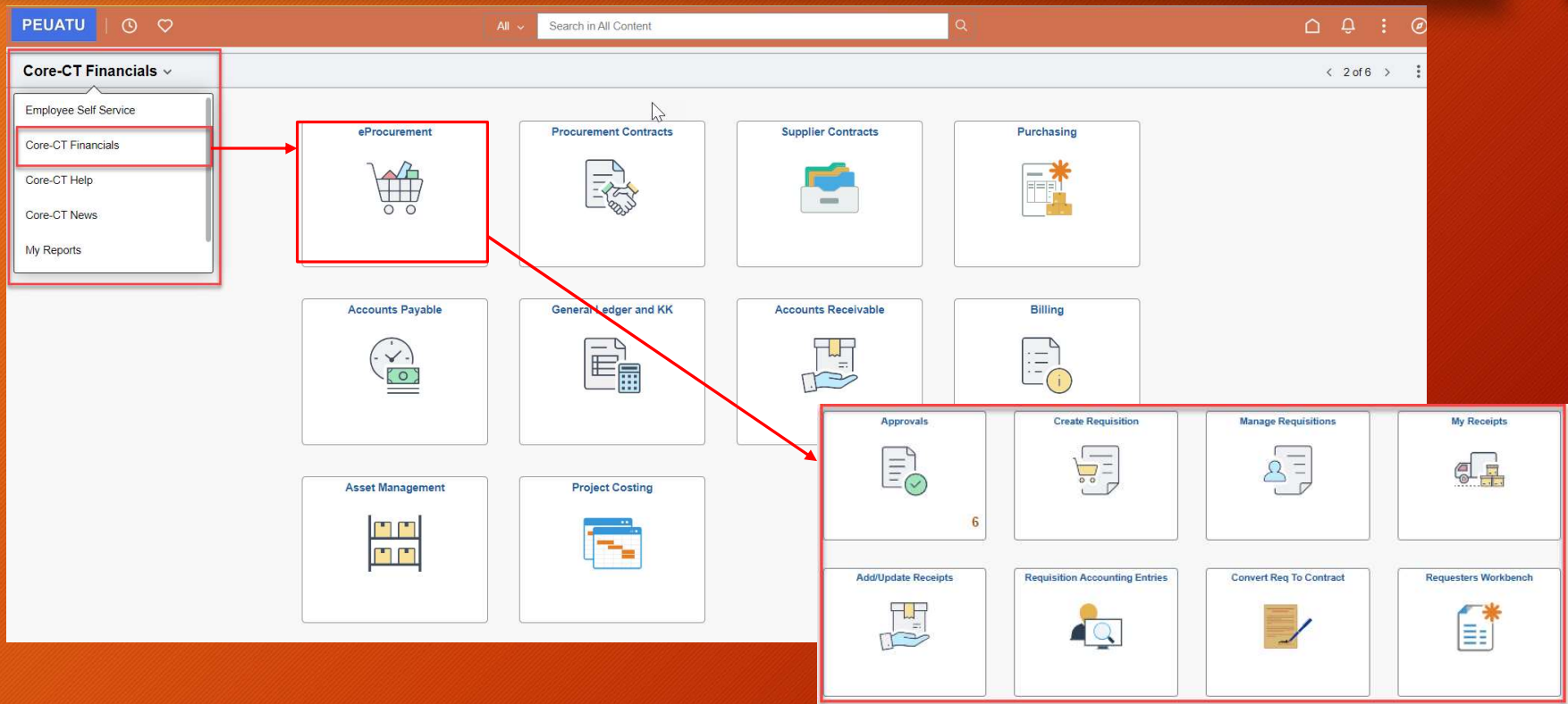
# eProcurement Agenda

- eProcurement - Fluid UI
- Create Requisition
- Requisition Defaults
- Catalog Search
- Manage Requisitions/My Requisitions
- Edit Requisition
- Mass Change Action
- Persistent Cart
- Punchout





# eProcurement - Fluid UI



# Create Requisition

Core-CT Financials > eProcurement tile > Create Requisition tile



# Requisition Defaults

- Define requisition is now called **Requisition Defaults**
- Override defaults no longer display here; that functionality is now under **Mass Change**
- Chartfields - 3 tabs

**Requisition Defaults**

**Header Defaults**

Business Unit: DOCM1  
Requester: 604731  
DOC-Mair-Johnson, Sharon Nadine  
Priority: Medium  
Currency: USD

Requisition Name: 0000136111  
Use Procurement Card:  No  
Card Number:   
Expiration Date:   
Requisition Type: Requisition  
Dispatch Method: Print  
Obligation Amount:

**Line Defaults**

Supplier ID:   
Supplier Location:   
Buyer:   
Category:   
Unit of Measure:

**Shipping Defaults**

Ship To: 1590000043  
Add One Time Address:   
Attention:   
Due Date:

**Distribution Defaults**

SpeedChart:

Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information | Show All

Distribution Line	Percent	Location	GL Unit	Account
1	100	ACORE	STATE	54060

# Requisition Defaults - (Continued)

## TIP:

If need to return to Requisition Defaults while adding to the cart

- click the **Cancel** button *or* anywhere outside the Req Defaults page to see the lines again.

**Requisition Defaults**

**Header**

Business Unit: DOCM1  
Requisition Name: 0000138111  
Requester: 604731  
DOC-Mair-Johnson, Sharon Nadine  
Priority: Medium  
Currency: USD  
Use Procurement Card:  No  
Card Number:   
Expiration Date:   
Requisition Type: Requisition  
Dispatch Method: Print  
Obligation Amount:

**Line Defaults**

Supplier ID:   
Supplier Location:   
Buyer:   
Category:   
Unit of Measure:

**Shipping Defaults**

Ship To: 1590000043  
Attention:   
Add One Time Address:   
Due Date:

**Distribution Defaults**

SpeedChart:

Distribution Line %	Percent %	Location %	GL Unit %	Account %
1	100	ACORE	STATE	54060

# Catalog Search

The screenshot shows the 'Advanced Search' window. At the top, there is a search bar with a 'Search Name' field, a magnifying glass icon, and a 'Search Tips' link. To the right are 'Clear' and 'Search' buttons. Below the search bar is a 'Save Search Criteria' link. The main section is titled 'Advanced Item Search' and contains a list of search fields. Each field has a dropdown menu for the operand and a text input for the value. The 'Item ID' field is highlighted with a red box, showing the operand 'Equals' and the value 'CM\_2157\_9014984'. Other fields include Description, Manufacturer, Manufacturer ID, Supplier, Supplier ID, UPN ID, Category ID, Supplier Item ID, Manufacturer Item ID, and Category, all with 'Contains Any' as the operand.

Field	Operand	Value
Description	Contains Any	
Manufacturer	Contains Any	
Manufacturer ID	Contains Any	
Supplier	Contains Any	
Supplier ID	Contains Any	
Item ID	Equals	CM_2157_9014984
UPN ID	Equals	
Category ID	Contains Any	
Supplier Item ID	Contains Any	
Manufacturer Item ID	Contains Any	
Category	Contains Any	

- To search the Catalog by item ID, change the operand from Contains Any to "Equal".
- Oracle removed the ability to Search by Contract ID. We are working on re-adding it soon.

# Manage Requisitions/ My Requisitions

Core-CT Financials> eProcurement tile> Manage Requisitions tile



# Manage Requisitions/ My Requisitions - Continued

Core-CT Financials> eProcurement tile> Manage Requisitions tile

The screenshot displays the 'My Requisitions' interface. On the left, a table lists requisitions with columns for 'Action', 'Requisition Name', and 'Business Unit/Requisition ID'. Two requisitions are visible: 'Test1234A' and 'Test 1234'. A 'Filters' dialog box is open in the center, showing search criteria for Business Unit, Requisition Type, Requisition ID, PO Number, From Date, To Date, Requester, Entered by, Request State, Budget Status, Item ID, Item Description, and Ship To Location. An 'Actions' menu is open on the left, showing options like Details, Copy, View Print, Cancel, Edit, and View Approval. The 'Edit' option is highlighted. In the bottom right, a 'Checkout' button is highlighted. The interface also shows a table with columns for 'State', 'Budget Status', and 'Total Amount', with two rows of data.

State	Budget Status	Total Amount
	Not Chk'd	234.81 USD
	Not Chk'd	234.81 USD

1. Manage Reqs> My Reqs
2. Adjust Filters
3. Select Edit action
4. Click Checkout to edit req

# Edit Requisition

**Edit Requisition**

Continue Shopping Save Submit

Requisition Defaults

▼ Requisition Summary

Business Unit: DOCM1 Dept. of Correction  
Requisition Name: Test 1234  
Requester: 604731 DOC-Mair-Johnson, Sharon Nadine  
Currency: USD  
Header Comments  
Preview Approvals

Priority  
Requisition Type  
Dispatch Method  
Card Number  
Expiration Date  
Budget Check Status  
Use Procurement Card

▼ Justification Comments

ATTN: JOE TEST  
Replenish Office Supplies  
Please reference C/N# 18PSX0032AC  
PLEASE REFERENCE PO # ON INVOICE AND PACKING SLIP

▼ Requisition Lines Overview

Select All Actions

**Line 1** Special Request  
BSN16473 Business Source Security Tint Window Envelopes  
Item ID  
Supplier: SUBURBAN STATIONERS INC  
Status: Pending  
Quantity: 3  
Unit of Measure: BX  
Price: 66.95  
Currency: USD  
Total: 200.85 USD

**Line 2** Special Request  
PIL31020 Pilot G2 Retractable Gel Ink Rollerball Pens

**Line 1 Details**

Item Summary  
BSN16473 Business Source Security Tint Window Envelopes  
Item ID  
Item Category: Office Equipment and Accessori  
Supplier: SUBURBAN STATIONERS INC  
Supplier Item ID: 694731  
Price: 66.95 USD  
Quantity: 3 Box  
Manufacturer's Item ID

Attributes  
Special Request

Schedule 1  
Quantity: 3  
Price: 66.95 USD  
Total: 200.85 USD

\*Ship To: 159000043  
Attention To: DOC-Mair-Johnson, Sharon A  
Due Date  
Address: 24 Walnut Hill Road, Wethersfield, CT 06109  
One Time Address  
Ship To Comments Price Adjustments Custom Fields

Distributions  
Please enter GL Business Unit before selecting chartfield values  
\*Distribute by: Quantity SpeedChart

Chartfields1	Chartfields2	Chartfields3	Details	Budget Information	Asset Information	Show All		
Distribution Line 1:	Status 1:	Dist Type 1:	Location 1:	Quantity 1:	Open Qty 1:	Percent 1:	Merchandise Amount 1:	GL Business Unit 1:
1	Open		ACORE	3	3	100	200.85	STATE

Schedule Details



# Mass Change Action

**1** Select Lines

**2** Select Mass Change action

**3** Review and replace old values

**4** Click Done

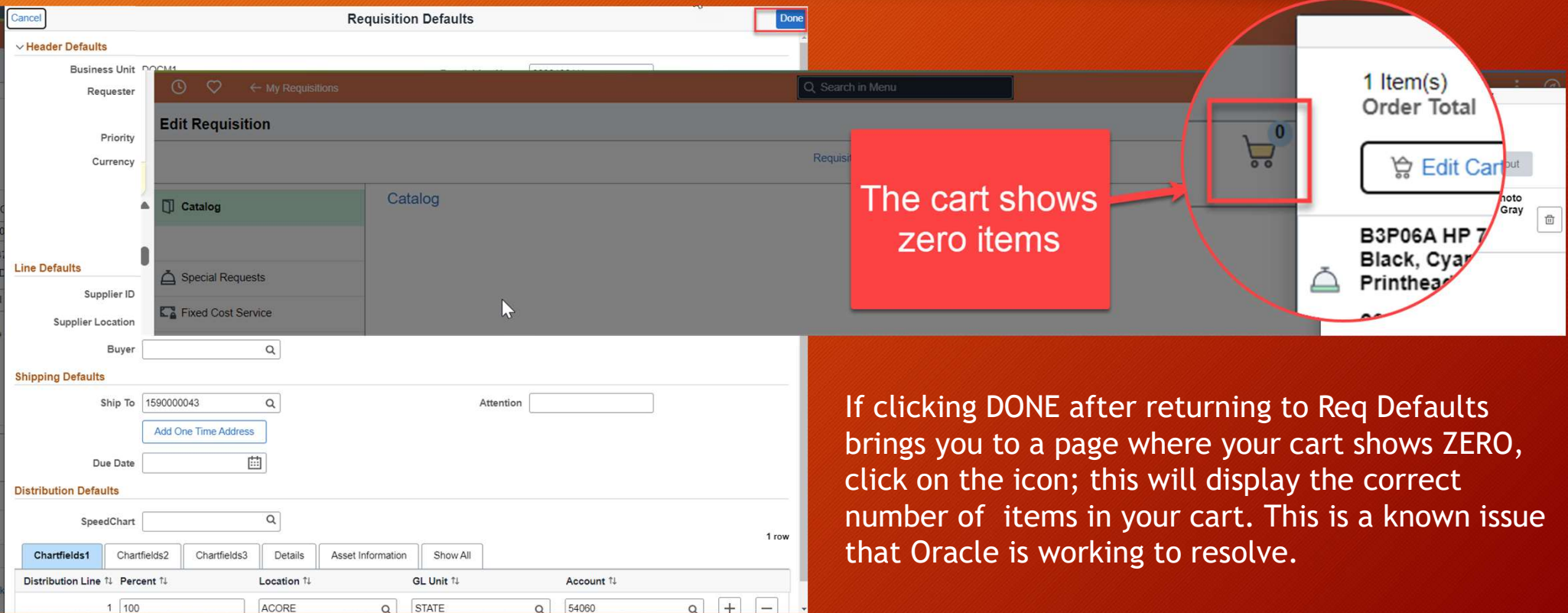
**5** Click OK

# Persistent Cart

- The Persistent Cart is a new feature designed with the user needs in mind. The cart stores items added *in between sessions*.
  - Shift in priorities
  - System timeouts



# Persistent Cart - Continued



The screenshot displays the Oracle Requisition Defaults interface. A red callout box highlights a shopping cart icon with the number '0' next to it, indicating zero items in the cart. A red arrow points from the text 'The cart shows zero items' to this icon. The background interface includes sections for Header Defaults, Line Defaults, Shipping Defaults, and Distribution Defaults. A table at the bottom shows a single row of distribution data.

Distribution Line	Percent	Location	GL Unit	Account
1	100	ACORE	STATE	54060

The cart shows zero items

If clicking DONE after returning to Req Defaults brings you to a page where your cart shows ZERO, click on the icon; this will display the correct number of items in your cart. This is a known issue that Oracle is working to resolve.

# Persistent Cart - Continued

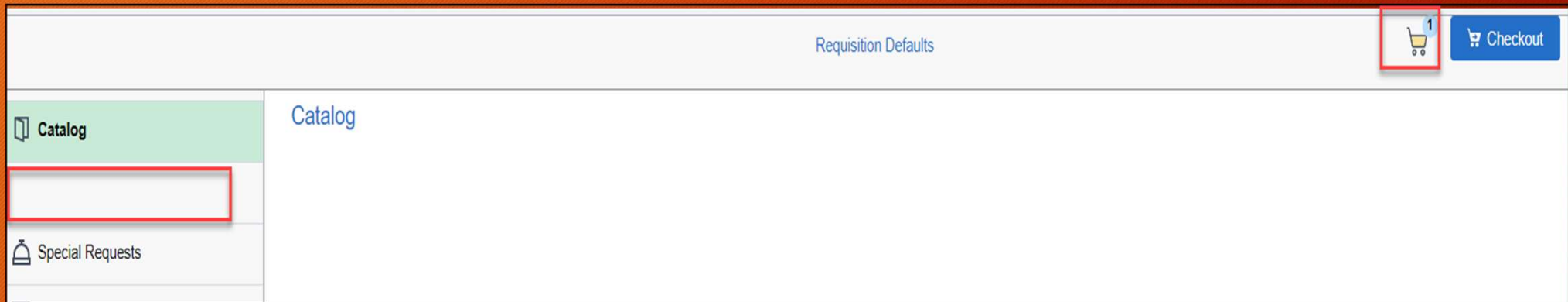
## TIPS:

- Get in the habit of clicking the cart icon before you start adding items to it (even if it shows zero). If there are items in your cart, they will display. You can do one of three things:
  - continue with the req for the existing items,
  - SAVE the req that needs those items to complete/Submit it in the future, or,
  - Simply delete the items to start your new req.



# Punchout

- If the Web Options don't display when you are about to select a Punchout Supplier, it means there are items in the cart from a previous session. Follow the steps on the previous slide to correct.



# Questions...



# Purchasing

Michele Richmond

# Agenda

- Budget Check a Purchase Order
- Email Validation on a Purchase Order
- Notification Bell: The Buyers Workflow
- Purchase Order Approval - Fluid
  - Approvals - Notification Bell
  - Approver Options
  - Purchase Order Approvals: Hold
  - Purchase Order Approvals: Comments & Status
- Procurement Contract





# Budget Check a Purchase Order

Budget Check is now available on the PO header!


**Add/Update POs**


Maintain Purchase Order


**Purchase Order**


Business Unit ECDM1  
PO ID 0000022521  
Copy From


**Header** ⓘ

\*PO Date 08/05/2024   [Supplier Search](#)

\*Supplier EPLUST4151-001   [Supplier Details](#)

\*Supplier ID 0000064731   EPLUS TECHNOLOGY INC

\*Buyer 164150   ECD-Flanagan Jessica R

PO Status Approved  
Budget Status Not Chk'd   Hold From Further Processing

Doc Tol Status Not Chk'd

Receipt Status Not Recvd

Priority Medium

\*Dispatch Method Print

**Budget Check Icon**

**Click on this icon to Budget check the Purchase order**

# Email Validation on a Purchase Order

- Email Validation has been added to Purchase Orders

**Supplier/Contact Fax/Email**

Email ID doit.core.emailte

**One Time Fax/Email**

The following fax / e-mail will override the supplier/cont...

Email Address michele.richmond@ct.

Invalid email format entered. Correct email format and click OK.

OK

**PO Header Details**

**PO Details**

Supplier EPLUST4151-001 PO Date  
\*PO Type GEN Q Budget Status  
\*Billing Location ECDM1AD Q Billing Address ID  
Origin 001 Q AES-AC Letter of Credit ID  
 Use One Ship To Ship To

**Currency**

Currency Code USD Q Exchange Rate Detail Base Currency  
Rate Date 08/05/2024 Exchange Rate  
Rate Type CRRNT

**Process Control Option**

Dispatch Acknowledgements required for  
\*Method Email Accounting Date

**Supplier/Contact Fax/Email**

Email ID doit.core.emailte

**One Time Fax/Email**

The following fax / e-mail will override the supplier/cont...

Email Address michele.richmond@ct.

**▼ Obligation Amount**

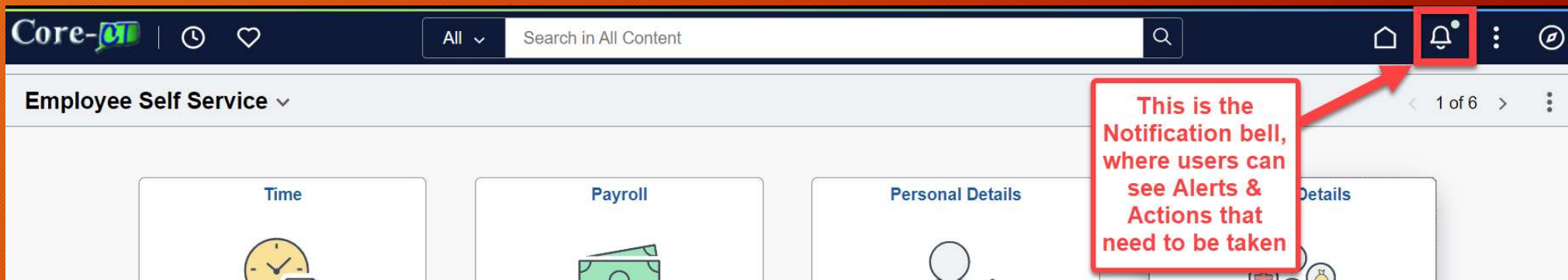
Obligation Amount 30,000.00  
Start Date 02/23/2024  
End Date 06/30/2024

Invalid email format entered. Correct email format and click OK.

OK

# Notification Bell: The Buyers Workflow

- Buyers workflow will **NOT** use Fluid Approvals, instead the Notification Bell will be used
  - The notification bell is used for Alerts and Actions for the user



# Purchasing Approval - Fluid

Purchasing Approvals are now through the Fluid Approval Tile

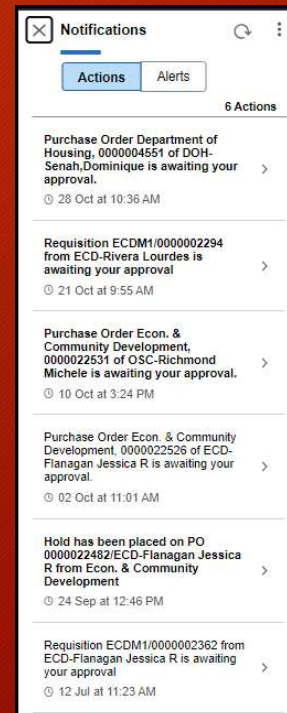
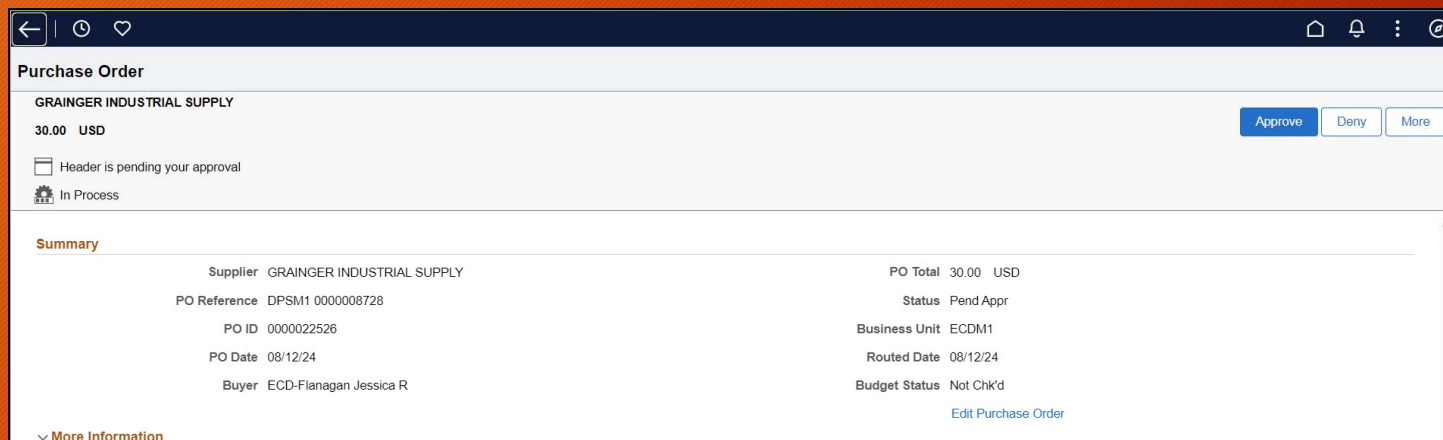
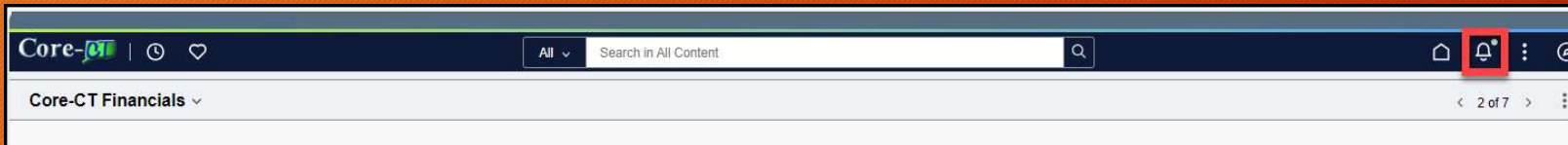


The screenshot shows the 'Pending Approvals' interface. On the left, there is a sidebar with 'View By' set to 'Type' and a list of categories: 'All' (2) and 'Purchase Order' (2). The main area displays a table of pending approvals. The first row is highlighted with a red border.

Type	Item	Vendor	Amount	Approval Status
Purchase Order	10.00 USD	ECDM1 / 0000023494 / ECD-Flanagan Jessica R / UAT TESTING	SUBURBAN STATIONERS INC	PO Amt Approver Less than \$10K Routed 08/08/2024
Purchase Order	1,344,344.00 USD	ECDM1 / 0000023476 / ECD-Flanagan Jessica R / FY25 STWM	ADAMS & KNIGHT INC	PO Amt Approver Less than \$10K Routed 08/08/2024

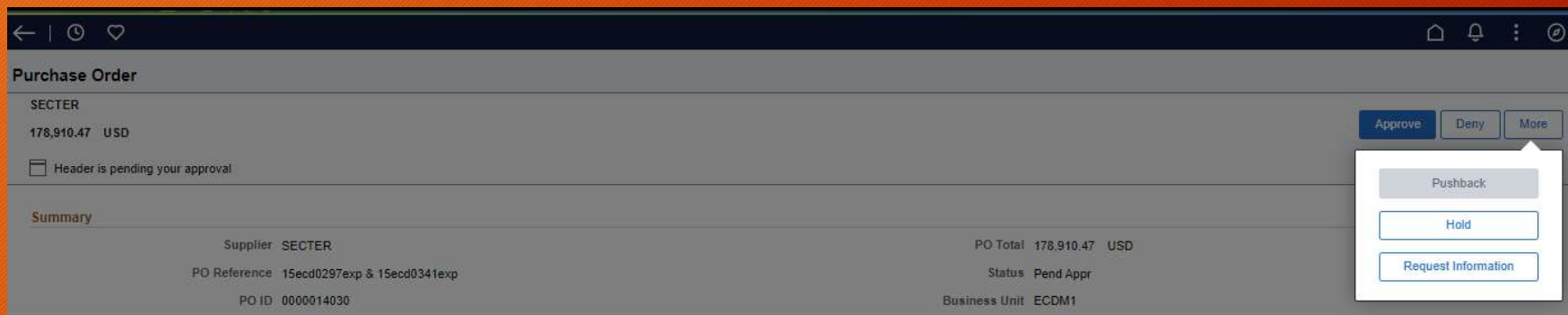
# Approvals - Notification Bell

Approvers can also use their notification Bell as an alternative way to approve a Purchase Order. An approval request will be under your Notification Bell / Action.



# Approver Options

- Once a Purchase Order is selected, you have 5 options...
  - Approve, Deny, Pushback, Hold, Request Information



Does not Require a Comment

Requires a Comment

Requires a Comment

Requires a Comment

Requires a Comment

Cancel Approve Submit

You are about to approve this request.

Approver Comments

OR

Cancel Deny Submit

You are about to deny this request.

Approver Comments

OR

Cancel Request Information Submit

You are about to request more information for this request.

Approver Comments

OR

Cancel Pushback Submit

You are about to Pushback this request

Approver Comments

OR

Cancel Hold Submit

You are about to put this request on hold.

Approver Comments

# Purchase Order Approvals: HOLD

- When a PO is put on HOLD, the approver will now see the word HOLD on the Pending Approvals Page.



Pending Approvals					
View By	Type	Purchase Order			
All	46				
Purchase Order	11				
Requisition	35				
Purchase Order					
Purchase Order	0.00 USD	ECDM1 / 0000022470 / ECD-Flanagan Jessica R	GRAINGER INDUSTRIAL SUPPLY	PO Amt Approver Less than \$10K	Routed 03/28/2024
Purchase Order	1,000.00 USD	ECDM1 / 0000022489 / ECD-Flanagan Jessica R / Test Po Change order	GRAINGER INDUSTRIAL SUPPLY	<b>HOLD</b>	Routed 05/13/2024
Purchase Order	178,910.47 USD	ECDM1 / 0000014030 / ECD-Flanagan Jessica R / 15sec0297exp & 15sec0341exp	SECTER	PO Amt Approver Less than \$10K	Routed 06/10/2024

# Purchase Order Approvals: Comments & Status

- The approval page on a Purchase Order will no longer show previous approver comments or if the PO is on HOLD. The approver will be required to click on Approval Chain to see any comments and the status of the pending PO.

**Purchase Order**  
GRAINGER INDUSTRIAL SUPPLY  
25.00 USD  
 Header is pending your approval

**Summary**  
Supplier: GRAINGER INDUSTRIAL SUPPLY  
PO Reference: Amount Only Contract  
PO ID: 0000022484  
PO Date: 04/11/24  
Buyer: ECD-Flanagan Jessica R

**More Information**  
View Printable Version

**Lines**

Line Number	Item Description
1	Amount Only Contract

**Approver Comments**

Approval Chain

**Approval Chain**

PO AMOUNT APPROVER  
Purchase Order 0000022484 Pending  
Start New Path  
PO AMOUNT APPROVER  
On Hold  
Multiple Approvers  
PO Amt Approver Less Than \$10K  
09/24/24 2:43 PM  
Comments  
ECD-Bocwinski Cheryl A at 09/24/24 - 2:43 PM  
hold test

PO Chartfield Approver  
Purchase Order 0000022484 Awaiting Further Approvals  
Start New Path  
PO Chartfield Approver  
Not Routed  
Multiple Approvers  
PO Chart Field Approver



# Procurement Contract

- PO Default & OPM Reporting link have moved to another location on the Procurement Contract

**Add/Update Contracts**

[Contract](#)

Contract Entry

**Contract**

SetID	STATE	Contract Version		Status
Contract ID	24ECCORE124	Version	1	Current
*Status	Approved	Approved Date	02/13/2024	

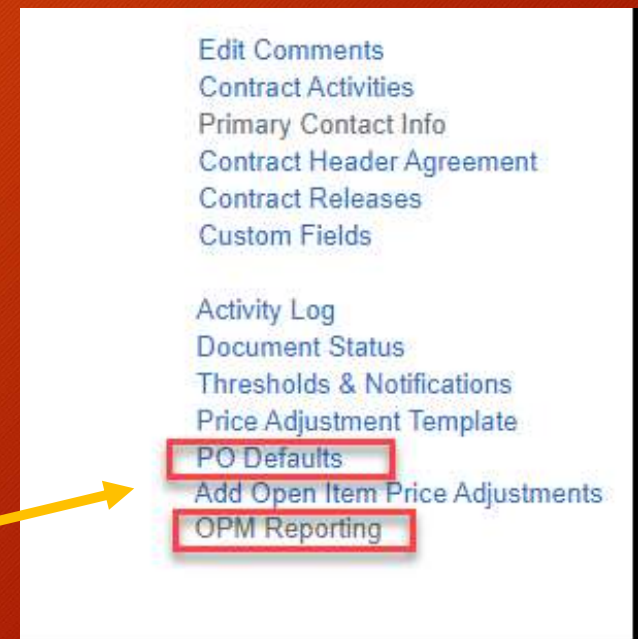
Administrator/Buyer: 164150 ECD-Flanagan Jessica R [Add a Docu](#)

State Identified Contract Type: General Letter

**Header**

Contract Style	Purchase Order	<a href="#">Edit Comments</a> <a href="#">Contract Activities</a> <a href="#">Primary Contact Info</a> <a href="#">Contract Header Agreement</a> <a href="#">Contract Releases</a> <a href="#">Custom Fields</a>  <a href="#">Activity Log</a> <a href="#">Document Status</a> <a href="#">Thresholds &amp; Notifications</a> <a href="#">Price Adjustment Template</a> <a href="#">PO Defaults</a> <a href="#">Add Open Item Price Adjustments</a> <a href="#">OPM Reporting</a>
Process Option	Purchase Order	
Supplier	GRAING0280-001	
Supplier ID	0000010008 <a href="#">GRAINGER INDUSTRIAL SUPPLY</a>	
Primary Contact		
Supplier Contract Ref		
Description	Quantity Contract	
Master Contract ID		
Begin Date	02/13/2024	
Expire Date	02/13/2025	
Renewal Date		
Control Type		

Tax Exempt Tax Exempt ID



# Procurement Contract

**Add/Update Contracts**

[Add Open Item Price Adjustments](#)  
[OPM Reporting](#)

\*Begin Date: 08/09/2024  
Expire Date: 08/09/2025  
Renewal Date:   
Control Type:   
 Tax Exempt    Tax Exempt ID:   
Currency: USD    CRRNT

**Amount Summary**

Maximum Amount: 0.00 USD  
Line Item Released Amount  
Category Released Amount  
Open Item Released Amount  
Non-PO PCard Transactions  
Total Released Amount

**Order Contract Options**

Allow Multicurrency PO     Allow Open Item Reference     Must Use Contract Rate Date  
 **Corporate Contract**     Adjust Supplier Pricing First     Auto Default  
 Lock Chartfields     Price Can Be Changed on Order    Rate Date: 08/09/2024

**Contract Items**

[Catalog Search](#)    [Item Search](#)    [Search for Contract Lines](#)

**Corporate Contract should only be selected if you are DAS creating a Statewide Contract. If this is not a State wide contract this should be unchecked**

# Questions...



Break

# Procurement Card

Brian Guilmartin

# Agenda

- US Bank
- Reconciliation
- Request Workflow Notifications
- P-Card Transfers

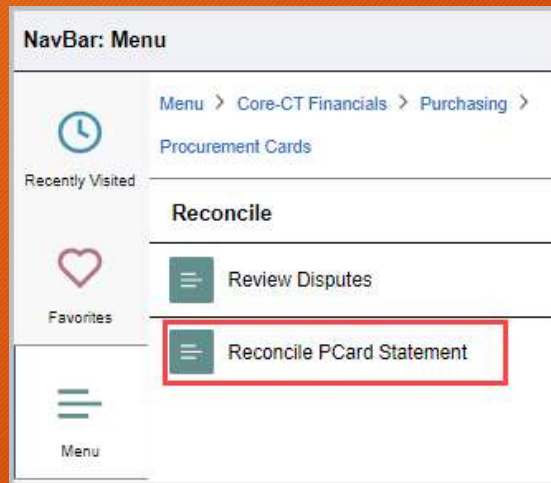


# U.S. Bank

- New Procurement Card Contract with U.S. Bank (Visa)
- Starting January 1, 2025
- Reconciliation process in CORE will be the same
- Expect a transition period with both banks and card number
- Card Requests will continue in CORE for JP Morgan until the contract ends.
- Card Requests for U.S. Bank will be handled with their Access Online platform.
- More to Come

# Reconciliation

- Navigation Change
- Reconcile Pcard Statement



- Business Unit Search

The screenshot shows the "Reconcile PCard Statement" search form. The title is "Reconcile PCard Statement". Below the title are social media icons and a "Reconcile Statement Search" section. The form contains the following fields:

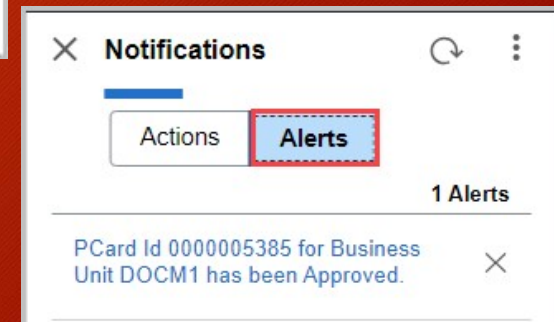
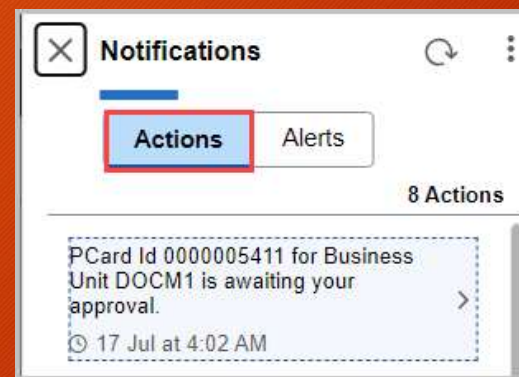
- Role Name: dropdown menu
- Employee ID: text input with search icon
- Name: text input with search icon
- Business Unit: text input with search icon, highlighted with a red box
- Card Issuer: dropdown menu (JPMC Mastercard)
- Card Number: text input
- Transaction Number: text input
- Merchant: text input

An "Exact Match" checkbox is located at the bottom right of the form.



# Request Workflow Notifications

- Request Workflow will now be in Notifications
- Approvals will be Notification Actions
- Denials and acknowledgements (e.g. changes) will be Notification Alerts
- Emails will continue as normal.



# Request Workflow Notifications

- In Process requests will not transition from the worklist to notifications.
- Action may be taken by navigating directly to the request or by using the email hyperlink
- Review any active requests in process and make sure they are up to date.

# P-Card Transfers

- Transferred Card transactions were unable to view history for previous custodians.
- These transactions can be corrected, if needed.
- Create a footprints ticket with the original and new custodian.

# Questions...



# Supplier Contract Mgmt / Budget Workbook

Brian Guilmartin

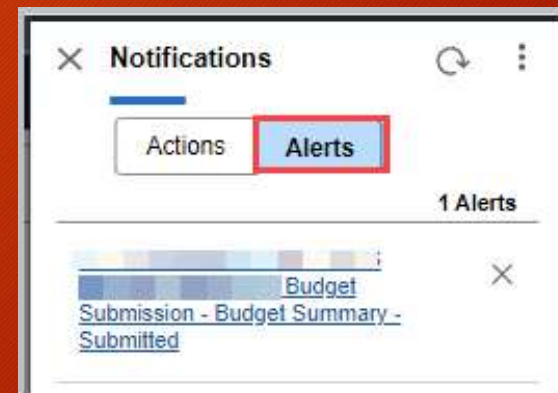
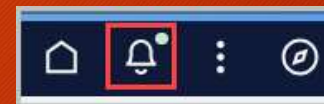
# Agenda

- Notifications
- Workflow Notifications



# Notifications

- Supplier Contract Internal Collaboration and the Budget Workbook will use Notification Alerts.
- Suppliers/Providers will continue to use the Worklist
- Emails will continue as normal



# Workflow Notifications

- In Process workflow will not transition from the worklist to notifications.
- Action may be taken by navigating directly to the document or by using the email hyperlink
- Review any active documents in process and make sure they are up to date.



# Questions...



# Accounts Payable

Michael Virone

# Accounts Payable Agenda

- Submitting Vouchers for Approval
  - Submitting Vouchers - Non-PO
  - Submitting Vouchers - PO Vouchers
- Notifications
- Form Navigation
- Accounts Payable WorkCenter



# Submitting Vouchers for Approval

- In Core-CT, Accounts Payable features a new batch process to submit vouchers for approval. Voucher processors are the submitter; voucher approvers no longer can submit.
- All vouchers must be submitted before being sent to the approval tile.
- The AP work center will have reports for monitoring vouchers that have not been submitted for approval.

# Submitting Vouchers - Non-PO

When a non-po voucher is saved, the Submit Approval button appears.

Voucher processors click Submit Approval:

The screenshot shows a web-based interface for submitting a voucher. The 'Invoice Information' tab is active, displaying various fields for voucher details. At the bottom right, the 'Submit Approval' button is highlighted with a red box, and a red arrow points to it from above.

Field	Value
Business Unit	PCAM1
Voucher ID	00425935
Invoice No	TESTING SUBMIT
Voucher Style	Regular Voucher
Accounting Date	10/02/2024
Invoice Date	09/16/2024
Receipt Date	09/30/2024
*Pay Terms	000
Basis Date Type	Inv Date
Supplier ID	0000000169
ShortName	WOODSTO169-001
Location	MAIN
*Address	1
Control Group	

**Invoice Total**

Line Total	10.00
*Currency	USD
Miscellaneous	
Freight	
Total	10.00
Difference	0.00

[Non Merchandise Summary](#)  
[Session Defaults](#)  
[Comments\(0\)](#)  
[Attachments \(0\)](#)  
[View Audit Logs](#)  
[Advanced Supplier Search](#)  
[Preview Approval](#)

Buttons: Save, Calculate, Print, **Submit Approval**

# Submitting Vouchers - PO Vouchers

- When a PO voucher is created and saved the submit button does not appear until the voucher is matched. Batch processes run daily at 8:00am, 10:00am, 12:00pm, 2:00pm and overnight.

**Regular Entry**

Summary | Related Documents | Invoice Information

Business Unit: PCAM1  
Voucher ID: 00425936  
Voucher Style: Regular

Supplier Name: INTERPRETERS & TRANSLATORS INC  
628 HEBRON AVE STE 500  
GLASTONBURY, CT 06033

Entry Status: Postable  
**Match Status: Matched** [Preview Approval](#)

Approval Status: Pending  
Post Status: Unposted

Doc Tol Status: Not Chk'd  
Budget Status: Not Chk'd

**Regular Entry**

Summary | Related Documents | Invoice Information | Payments | Voucher Attributes | Error Summary | Consumption

Business Unit: PCAM1  
Invoice No: TEST12345  
Voucher ID: 00425936  
Accounting Date: 10/02/2024  
Voucher Style: Regular Voucher  
\*Pay Terms: 000 Due Now  
Invoice Date: 10/01/2024  
Basis Date Type: Inv Date  
Receipt Date: 09/05/2024  
Supplier Name: INTERPRETERS & TRANSLATORS INC  
Supplier ID: 0000010430  
ShortName: INTERP5742-001  
Location: MAIN  
\*Address: 1

Invoice Total

Line Total	150.00
*Currency	USD
Miscellaneous	
Freight	
Total	150.00
Difference	0.00

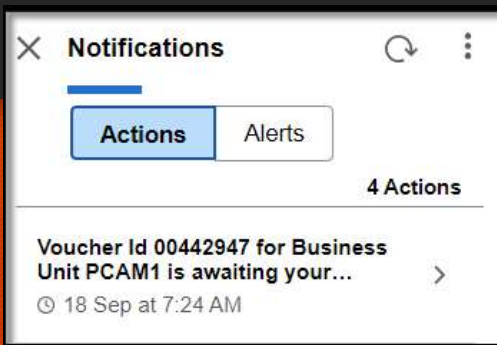
Non Merchandise Summary  
Session Defaults  
Comments(0)  
Attachments(0)  
[View Audit Logs](#)  
[Advanced Supplier Search](#)  
[Preview Approval](#)

Penalty Details

Save Calculate Print **Submit Approval**

# Notifications

Submitted vouchers will show for the Approver on the Notification Bell and Approval Tile.



# Form Navigation

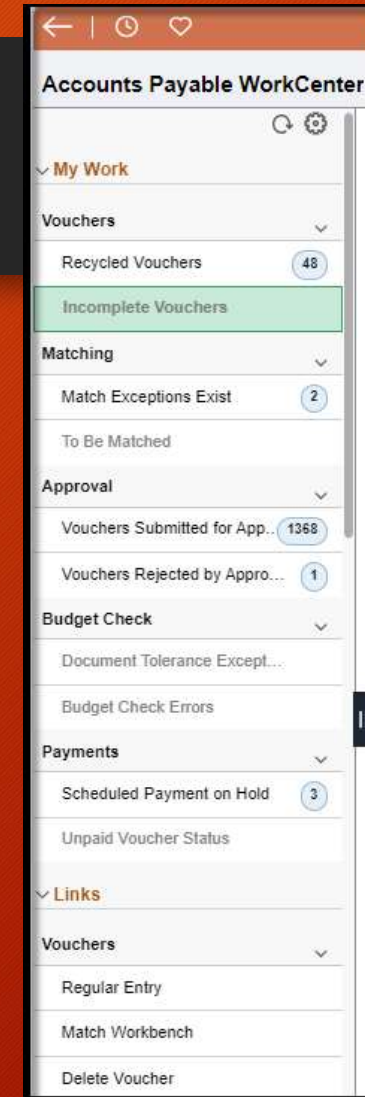
Many high action items are accessible in multiple ways either by the AP tiles, the AP Navigation Collection or the NavBar menu. The AP tiles and AP Navigation Collection do not contain all items in the NavBar menu for the module. One example of an item that is only accessible via the NavBar menu are the AP forms.

The screenshot displays the PEUATU Core-CT Financials interface. The main area features a grid of eight navigation tiles: eProcurement, Procurement Contracts, Supplier Contracts, Purchasing, Accounts Payable, General Ledger and KK, Accounts Receivable, and Billing. An overlay titled "NavBar: Menu" is open on the right side, showing a breadcrumb trail: Menu > Core-CT Financials > Accounts Payable > Review Accounts Payable Info. Below the breadcrumb, the menu is organized into sections: "Recently Visited" (empty), "Favorites" (empty), and "Menu". The "Menu" section lists several payment-related items, each with a hamburger menu icon: Active Payroll Pmt Cxl - CO964, Payment Information - CO860, Payment\_Cancellation\_CO790, Retiree Pyrl Pmt Cxl - CO965, AP Payments Document Status, Payment, and Replaced Payments.



# Accounts Payable WorkCenter

Users have access to the Accounts Payable WorkCenter that compiles all the links and pagelets necessary to carry out transactions, but with less navigation.



# Accounts Payable WorkCenter

The Voucher Approval section and the Voucher not submitted Query will assist with identifying vouchers that have not been submitted for approval.

- My Work
  - Vouchers
    - Recycled Vouchers
    - Incomplete Vouchers
  - Matching
    - Match Exceptions Exist
  - To Be Matched (3)
  - Approval
    - Vouchers Submitted for App... (13)
    - Vouchers Rejected by Appro... (1)
  - Budget Check
    - Document Tolerance Except... (1)
    - Budget Check Errors (1)

Query Manager

Queries

- eSupplier User Information
- eSupplier User Information - To/From
- PCard Voucher Payment Status
- Voucher not submitted



CT\_VOUCHER\_APPROVAL- Voucher not submitted

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (749 kb)

View All First 1-100 of 3286 Last

Row	Unit	Voucher	Invoice	Pay Amt	Date	Supp SetID	Supplier	Acctg Date
1	AESM1	00022438	0803345963	54.800	10/06/2023	STATE	0000094256	03/01/2024
2	AESM1	00022497	test123	10.000	02/05/2024	STATE	0000012903	03/01/2024
3	AESM1	00022500	ValidationTestAM01	2779.700	02/14/2024	STATE	0000013946	03/01/2024
4	AESM1	00022507	TEST WORKCENTER	1000.000	08/12/2024	STATE	0000010211	09/03/2024
5	AESM1	00022511	TEST NO SUBMIT BTN	25.000	08/22/2024	STATE	0000010029	09/06/2024

# Questions...



# Asset Management

Scott Przygocki

# Asset Management Agenda

- Asset Management Approvals
- Comments and Attachments - Additional Access
- Fluid AM WorkCenter
- Asset Tracking Dashboard Navigation
- FYI - Other Asset Updates



# Asset Management Approvals

- Two transaction types now initiate Approval Workflow:
  - Disposals (Retirements)
  - Inter-Unit Transfers
- One level of approval
- New Role: Asset Approver (CT\_F\_A\_ASSET\_APPR)
  - Segregation of Duties conflict with Financial Asset Processor role
  - **Financial Security Liaisons** must assign this role to eligible employee(s) on the first day of go-live

# Asset Management Approvals

- Why?



# Asset Management Approvals



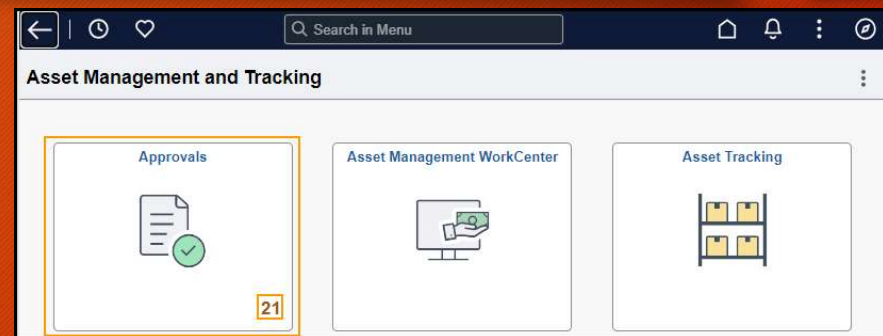
- Central Accounts Payable, Security and Asset Management identified a financial security concern with individual employees removing assets from In Service status unchecked
- Resolution found in having Core-CT implement approvals for those transactions
- This ensures adequate internal controls, just as approval workflow achieves in other Supply Chain modules






# Asset Management Approvals

What does this change mean for Asset Teams?

- Asset Approvers
  - Will review then Approve or Deny transactions
- Asset Processors
  - Will see an increase in Retirement Interfaces to Load

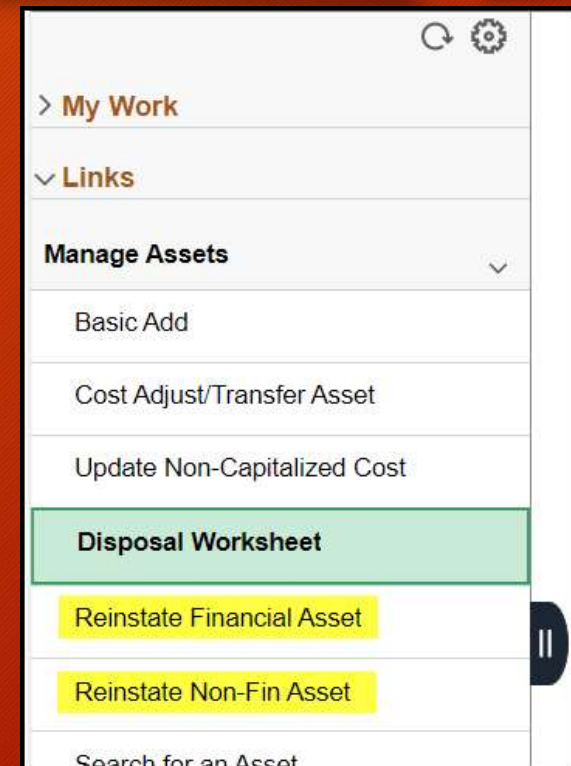


Pending Approvals		
View By	Type	▼
	All	9
	Asset Disposal	7
	Asset Inter Unit Transfer	2

# Asset Management Approvals

What does this change mean for Asset Teams?

- Financial Asset Processors
  - Disposals and IUTs will route for approval
  - Disposal Authorization should be entered as a new Asset Comment
  - Only the **Disposal Worksheet** page will be used for retiring assets
  - The single asset retirement page links have been renamed to Reinststate
    - These pages will still be used to review retirement information and reinstate assets



# Asset Management Approvals

1. Assets cannot be transacted on further while they have a pending approval
2. The **Approval Pending** indicator will appear on the asset's Review Cost page
3. All assets currently pending approval can be found on **Search for an Asset**

Unit: OSCM1 Asset ID: 000000000459 Avocent Gateway CORE-GDC-UMG0

Approval Pending

**Book**

Book Name: GASB GASB34 Current  
Total Cost: 6,850.00

**Asset Cost Information**

Cost Chartfields

	Acctg Date	Trans Type	In/Out	Quantity
1	03/30/2015	ADD		1.0000

Comments (4) Attachments (0)

Return to Search Notify

**Search for an Asset**

My Work

Links

Manage Assets

Basic Add

Interface Transactions - Consolidate

Interface Transactions - Utilize

Cost Adjust/Transfer Asset

Update Non-Capitalized Cost

Disposal Worksheet

Reinstate Financial Asset

Reinstate Non-Fin Asset

Search for an Asset

**Search for an Asset**

Asset Search Criteria

Unit

Category

Asset ID

Tag Number

Serial ID

Approval Pending  
Additional Search Criteria

Acquisition Details

PO Unit  Receipt

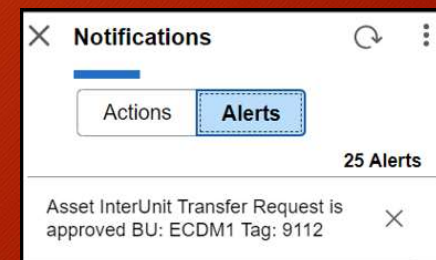
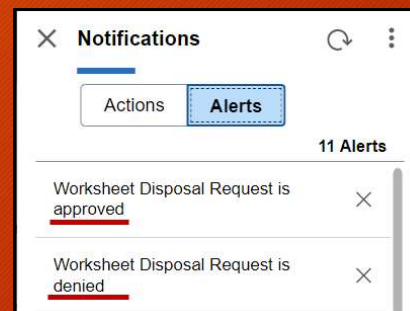
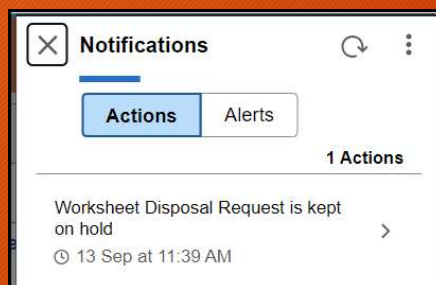
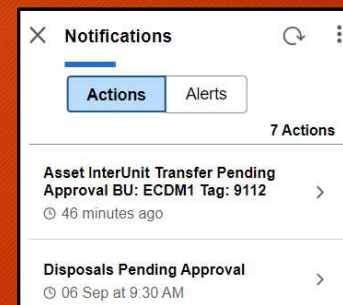
PO No  Receipt

Retrieve

# AM Approval Notifications




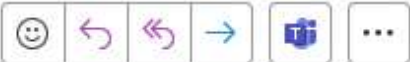


- Disposals can include many assets, so detail in notifications is limited
- Approvers will receive Actions for new requests
  - Link to Pending Approvals page
- Financial Asset Processors will receive notifications whenever the Approver acts
  - Only the most recent action taken on Disposals will be listed for the whole transaction




# AM Approval Emails

- Approvers will receive an email when a request is routed to them
- Financial Asset Processors will receive an email whenever the Approver acts on their requests
  - Disposal emails will include most recent approval status of all assets in the whole request

Asset Disposal Approved

 Asset.Approver@ct.gov   

To  FinancialAsset.Processor@ct.gov Fri 9/20

Your disposal request has been partially or fully APPROVED. A new retirement interface is pending for your Asset Processor to load and finalize the retirement.

Here is the latest approval status of each asset on this request:

DATE\_SUBMITTED: 2024-09-20  
DTTM\_STAMP: 2024-09-20-09.52.17.000000  
ORIGINATOR\_ID: DemoRequester  
BUSINESS\_UNIT: DASM1  
APPROVED\_ASSETS: 000000006932 / 000000006929 / 000000006928 / 000000006912  
DENIED\_ASSETS: 000000006914 / 000000006911 / 000000006908  
PENDING\_ASSETS: 000000006913

# Comments and Attachments - Additional Access

- Asset Comments and Attachments have been made accessible on several new pages:
  - \*Cost Adjust/Transfer\*
  - \*Disposal Worksheet\*
  - Review Cost
  - Review Book
  - Reinstate Financial Asset
  - Reinstate Non-Fin Asset

The screenshot displays the 'Asset Cost History' interface. At the top, there are four tabs: 'Cost History List' (selected), 'Cost History Detail', 'Non Cap History List', and 'Non Cap History Detail'. Below the tabs, the asset details are shown: Unit AESM1, Asset ID 00000000061, and MICROSCOPE Leica EM CU7. The 'Book' section shows Book Name GASB, GASB34, and Total Cost 58,051.93. The 'Asset Cost Information' section includes a search icon, a 'Cost' button, and a 'Chartfields' dropdown. Below this is a table with columns: Acctg Date, Trans Type, In/Out, and Quantity. The table contains one row: 1, 07/12/2023, TRF, I, 1.0000. At the bottom, there are two highlighted boxes: 'Comments (10)' and 'Attachments (0)'. Below these are four buttons: 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

Acctg Date	Trans Type	In/Out	Quantity
1 07/12/2023	TRF	I	1.0000

# Fluid AM WorkCenter

- No more tabs; All four main sections are always shown
- Menu sections and menu itself can be expanded or contracted
- Related Content drop-down link is no longer available

The screenshot displays the Asset Management WorkCenter interface. The top navigation bar includes a search box labeled "Search in Menu" and standard navigation icons. The main content area is titled "Asset Management WorkCenter" and features a sidebar menu on the left and a main content area on the right.

The sidebar menu is organized into sections:

- My Work** (1): This section is highlighted with a red box and a blue circle containing the number 1. It includes a sub-section "Pending Transactions" with a dropdown arrow, and two items: "Identify Assets in PO" (2) and "Load Transactions into AM" (1), which is currently selected and highlighted in green.
- Exceptions** (2): This section is highlighted with a red box and a blue circle containing the number 2. It includes two items: "Pre-interface Lines in Error" and "Interface Lines in Error".
- Links** (3): This section is highlighted with a red box and a blue circle containing the number 3. It includes three items: "Manage Assets", "Asset Review", and "Physical Inventory".
- Queries** (4): This section is highlighted with a red box and a blue circle containing the number 4. It includes one item: "Reports/Processes".

The main content area is titled "Load Transactions into AM" and includes a "Process Monitor" link. It features a table with the following columns: "AM Unit", "System Source", "Interface ID", "Load Type", "Load Description", and "Review Pending Transactions". The table contains one row of data:

AM Unit	System Source	Interface ID	Load Type	Load Description	Review Pending Transactions
OSCM1	AM Batch	10099818	NAD	Non-Financial Add	1

# Fluid AM WorkCenter

- Hyperlinks in Review Pending Transactions
- Action button
- Can only load one unique Interface ID at a time
- Can select individual lines of an Interface ID by Load Type
- \*Recommended to load all lines of an Interface ID\*
- Process Monitor Link

**Load Transactions into AM** Process Monitor

7 rows

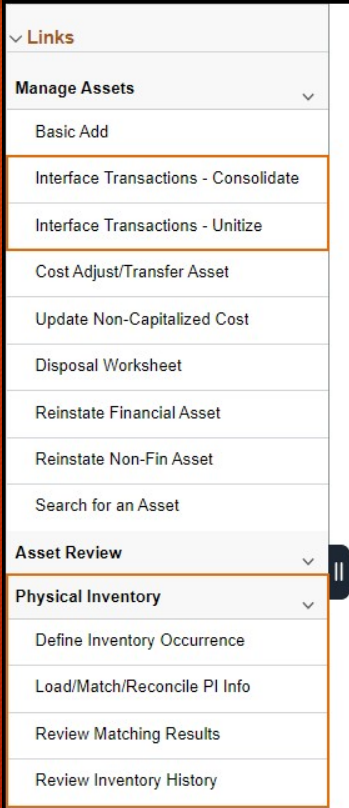
<input type="checkbox"/>	AM Unit ↑↓	System Source ↑↓	Interface ID ↑↓	Load Type ↑↓	Load Description ↑↓	
<input type="checkbox"/>	ECDM1	AP Online Entry Page	10099362	CAP	Asset Capitalization	3
<input type="checkbox"/>	ECDM1	AP Online Entry Page	10099727	ADQ	Adjust Cost/Acquisition Detail	1
<input type="checkbox"/>	ECDM1	AP Online Entry Page	10099727	FAD	Financial & Physical Add	1
<input type="checkbox"/>	ECDM1	AM Batch	10100013	RET	Asset Retirement	1
<input type="checkbox"/>	ECDM1	AM Batch	10100015	RNA	Retired Non-Financial Asset	2
<input type="checkbox"/>	ECDM1	AM Batch	10100015	RET	Asset Retirement	3
<input type="checkbox"/>	ECDM1	AM Batch	10100017	RET	Asset Retirement	1

**Review Pending Transactions**



# Fluid AM WorkCenter

- New high-use pages added
  - Access based on role
- Asset Processors
  - Consolidate
  - Unitize
- Physical Inventory Processors
  - Define Inventory Occurrence
  - Load/Match/Reconcile PI Info
  - Review Matching Results
  - Review Inventory History
- Financial Asset Processors
  - Retirement > Reinstatement

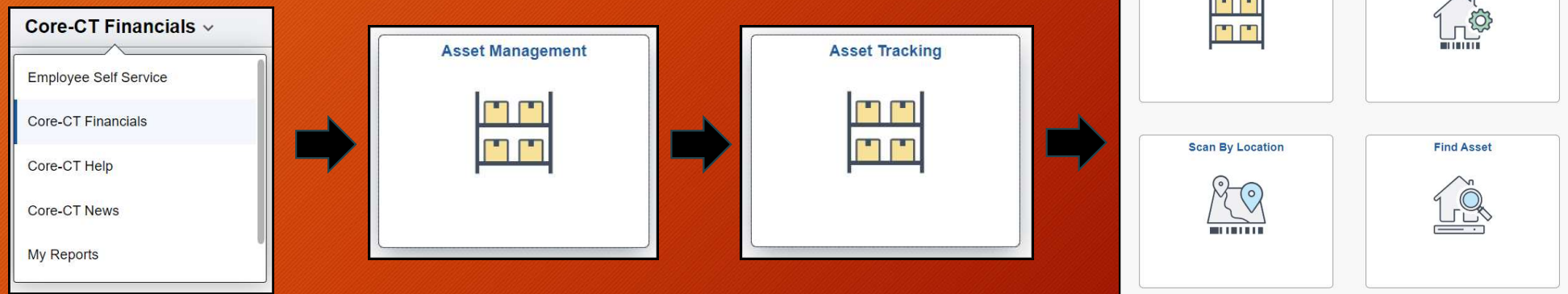


The screenshot shows a vertical navigation menu with the following structure:

- Links (expanded)
- Manage Assets (expanded)
  - Basic Add
  - Interface Transactions - Consolidate
  - Interface Transactions - Unitize
  - Cost Adjust/Transfer Asset
  - Update Non-Capitalized Cost
  - Disposal Worksheet
  - Reinstate Financial Asset
  - Reinstate Non-Fin Asset
  - Search for an Asset
- Asset Review (expanded)
- Physical Inventory (expanded)
  - Define Inventory Occurrence
  - Load/Match/Reconcile PI Info
  - Review Matching Results
  - Review Inventory History

# Asset Tracking Dashboard Navigation

- Asset employees are already experienced users of the Fluid Interface
- Mobile/Scanning device navigation
  - No longer immediately brought to the Asset Tracking dashboard
  - Physical Inventory Scanners will have to navigate to Core-CT Financials > Asset Management > Asset Tracking to access tiles such as Physical Inventory



# FYI Additional Asset Updates

- Property Control Manual
  - Updated July 2024
  - Webinar coming in early 2025
  - Questions to [OSC.ASSETS@CT.GOV](mailto:OSC.ASSETS@CT.GOV)
- CO-853 Adjustments to State-Owned Assets
  - Updated July 2024
  - Webinar coming in early 2025
  - Questions to [OSC.CO-853@CT.GOV](mailto:OSC.CO-853@CT.GOV)
- CO-59 Asset Management/Inventory Report/GAAP
  - Updated in May 2024
  - Now overseen by Budget and Financial Analysis Division
  - Questions to [OSC.CO-59@CT.GOV](mailto:OSC.CO-59@CT.GOV)

# Questions...



# EPM/STARS

Wendy Monk

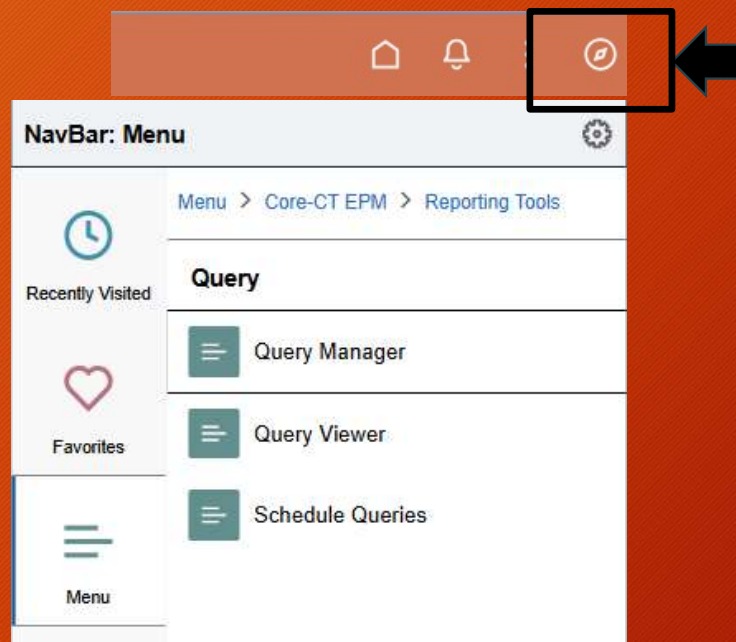
# EPM/STARS Agenda

- EPM Navigation
- EPM PUM Favorites
- STARS Navigation



# EPM Navigation

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



# 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



# Questions...

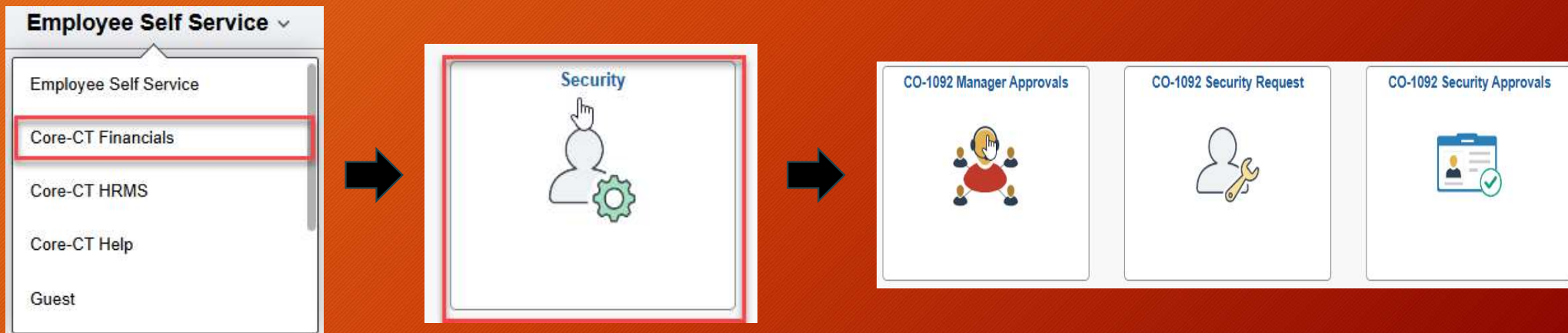


# Security

Dustin Guarino

# Security - CO-1092's

- The new Security CO-1092 navigation and approvals



# 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](mailto:Readiness@ct.gov) (anyone without a ct.gov email address)





# Core-CT Website

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

State of Connecticut Governor Ned Lamont

**Core-CT** HRMS/FINANCIALS/REPORTING SYSTEM

Home About Us Help Contact

**Core-CT Modernization**

Useful Links

Core-CT Agency Appointed Change Agents | Core-CT PUM Upgrade Training Registration

Core-CT PUM Upgrade Training and Support

**Change Agent Meetings**

Meeting Date	Content
October 3, 2024	Slides (PDF) - <a href="#">Change Agent Meeting Slides</a> Recording (mp4) - <a href="#">10/03 Change Agent Meeting Recording</a> Transcript (pdf) - <a href="#">Change Agent Meeting Transcript</a>
August 27, 2024	Slides (pdf) - <a href="#">8/27 Change Agent Meeting Slides</a> Recording (mp4) - <a href="#">8/27 Change Agent Meeting Recording</a>
August 15, 2024	Slides (pdf) - <a href="#">UAT HCM Kickoff 2024</a> Recording (mp4) - <a href="#">UAT HRMS Kickoff 2024 Recording</a> Q&A (xlsx) - <a href="#">UAT HCM Kickoff 2025 Q&amp;A</a>

## Core-CT PUM Upgrade Training Registration

The L200 instructor-led courses listed below review updates introduced by the PUM Upgrade. Please see the list of Core-CT roles (under "Description") for each course when registering.

The prerequisite L100 courses for these are self-paced eLearning modules. They may be accessed by clicking on the appropriate L100 course name below. (In future both L100 and L200 self-paced courses will be available through a Core-CT Training and Support page.)

To register for an L200 course, please click on the desired session.

Module	Course & Prerequisites	Description	Sessions
HR	L200 Managing Job ----- Prerequisite: <a href="#">L100 HR Navigation Overview</a>	Upon completing this course, participants will be able to administer HR processes to maintain employee jobs, status, and data, hire and rehire an employee, dual employment processing, maintain employee job information/data, salary increases, transferring an employee, and supervisor changes.  Role: HR Specialist  (.pdf) - <a href="#">L200 Managing Job Deck Recording</a> (.mp4) - <a href="#">L200MJ002 Managing Job Recording 10-07-24</a> (.pdf) - <a href="#">L200MJ002 Managing Job Transcript 10-07-24</a> (.pdf) - <a href="#">L200 Managing Job Q&amp;A</a>	L200MJ002 <a href="#">Oct 7, 9:00-11:00 AM</a>  L200MJ001 <a href="#">Oct 9, 9:00-10:00 AM</a>
HR	L200 Personal Data ----- Prerequisite: <a href="#">L100 HR Navigation Overview</a> <a href="#">L200 Managing Job</a>	Upon completing this course, participants will be able to access Fluid tiles related to modify person, create employee, create person of interest, and organizational relationship, administer processes to update employee personal data, and create organizational relationships.  Roles: HR Specialist, Retirement Payroll	L200PD002 <a href="#">Oct 10, 9:00-10:00 AM</a>  L200PD001 <a href="#">Oct 24, 1:00-2:00 PM</a>

# Core-CT Website

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

## Core-CT PUM Upgrade Training and Support

The recent upgrade of the Core-CT system has resulted in the modification of many of its procedures. The following training and support materials are available:

- Infographics:** One-page documents that recap cross-module topics such as Navigation and Approvals.
- Job Aids:** Printable documents outlining the business process and steps within Core-CT.
- 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. [Click here to register.](#)

### FINANCIALS

Click on a module to access its support materials.

<a href="#">Cross Module</a>	<a href="#">Customer Contracts</a>	<a href="#">PCard</a>
<a href="#">Accounts Payable</a>	<a href="#">eProcurement</a>	<a href="#">Procurement Contracts</a>
<a href="#">Accounts Receivable</a>	<a href="#">eSupplier</a>	<a href="#">Project Costing</a>
<a href="#">Asset Management</a>	<a href="#">Gen. Ledger / Commitment Control</a>	<a href="#">Purchasing</a>
<a href="#">Billing</a>	<a href="#">Grants</a>	<a href="#">Strategic Sourcing</a>
<a href="#">Catalog Management</a>	<a href="#">Inventory</a>	<a href="#">Supplier Contract Management</a>

### HCM

Click on a module to access support materials.

<a href="#">Cross Module</a>	<a href="#">Kronos</a>
<a href="#">Benefits</a>	<a href="#">Payroll</a>
<a href="#">Human Resources</a>	<a href="#">Time and Labor</a>

[Teachers Retirement Board](#)

### EPM

Currently no support materials available.

# Clearing Cache/Browser Info

- Clear your Cache <https://www.core-ct.state.ct.us/help.html>
- Use a new window with In Cognito browsing
- Use a new In Private window in Edge



The screenshot shows the top portion of the Core-CT website. At the top left is the 'CT.GOV Connecticut's Official State Website' logo. At the top right is the 'Governor Ned Lamont' logo. Below these is a blue header bar with the 'Core-CT' logo and the text 'HRMS/FINANCIALS/REPORTING SYSTEM'. Underneath the header is a navigation menu with links for 'Home', 'About Us', 'Help', and 'Contact'. The main content area is titled 'Browser Information' and contains a list of five links with their respective update dates:

- [Opening a Browser in a Private Session](#) - updated November 2023
- [Clearing Browser Cache](#) - updated November 2023
- [How to Manage Pop-up Blockers](#) - updated May 2022
- [Browsers Supported by Core-CT](#) - updated May 2022
- [Clearing Cache on TC75 Module Device](#)

# Reminders

- Favorites WILL NOT carry over
- Run Controls WILL carry over
- Punchout WILL NOT be available on mobile devices
- 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



# Questions...



# Closing

Brianne McKenna

## Closing

Thank You

for your participation today. We hope this information proved helpful.

Look for this presentation on the Core-CT website

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



# 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.