Core-CT FIN PUM Delta User Group

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

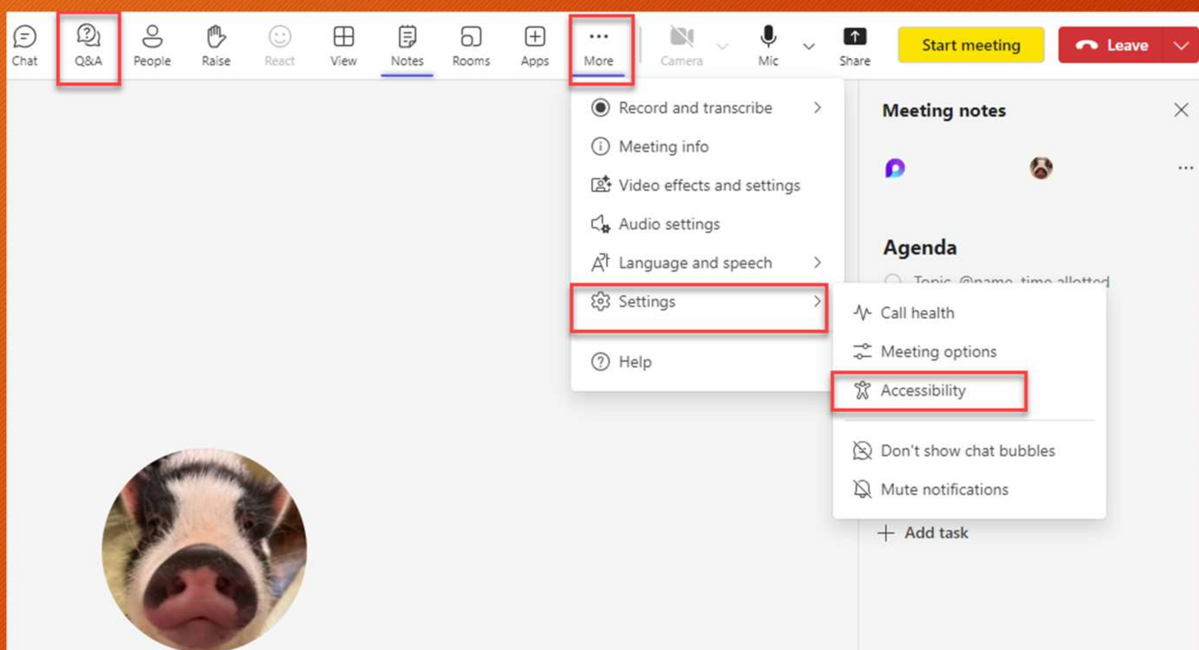
November 19, 2024

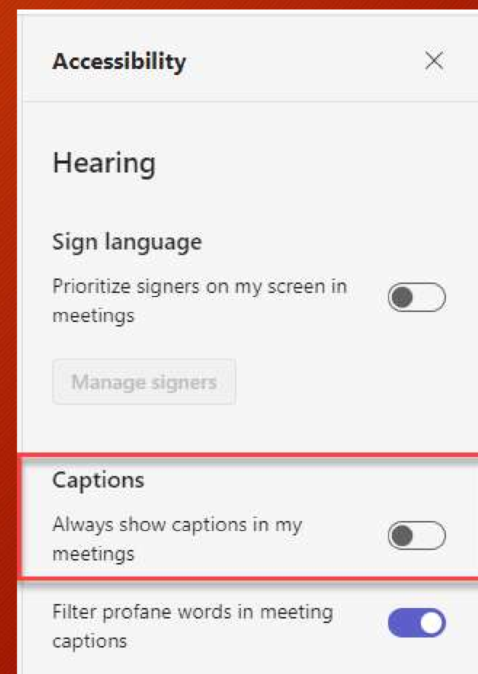
Welcome

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.

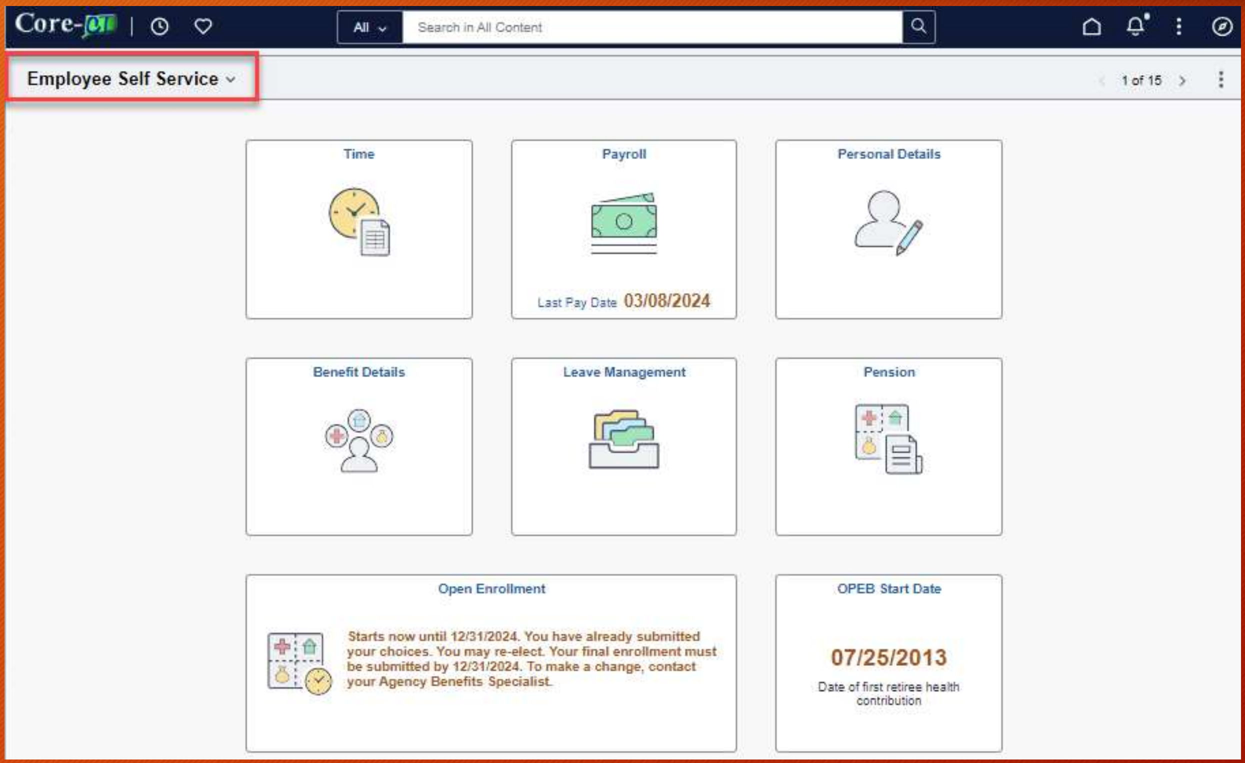
Agenda

• Welcome	Donna Braga
• Navigation & Approvals	Brianne McKenna
• ePro	Maty Bello-Persson
• PO	Michele Richmond
• PCard	Brian Guilmartin
• SCM/BW	Brian Guilmartin
• AP	Michael Virone
• AM	Scott Przygocki
• EPM/STARS	Wendy Monk
• Security	Dustin Guarino
• Help Desk	Shanon Reutter
• Closing	Brianne McKenna

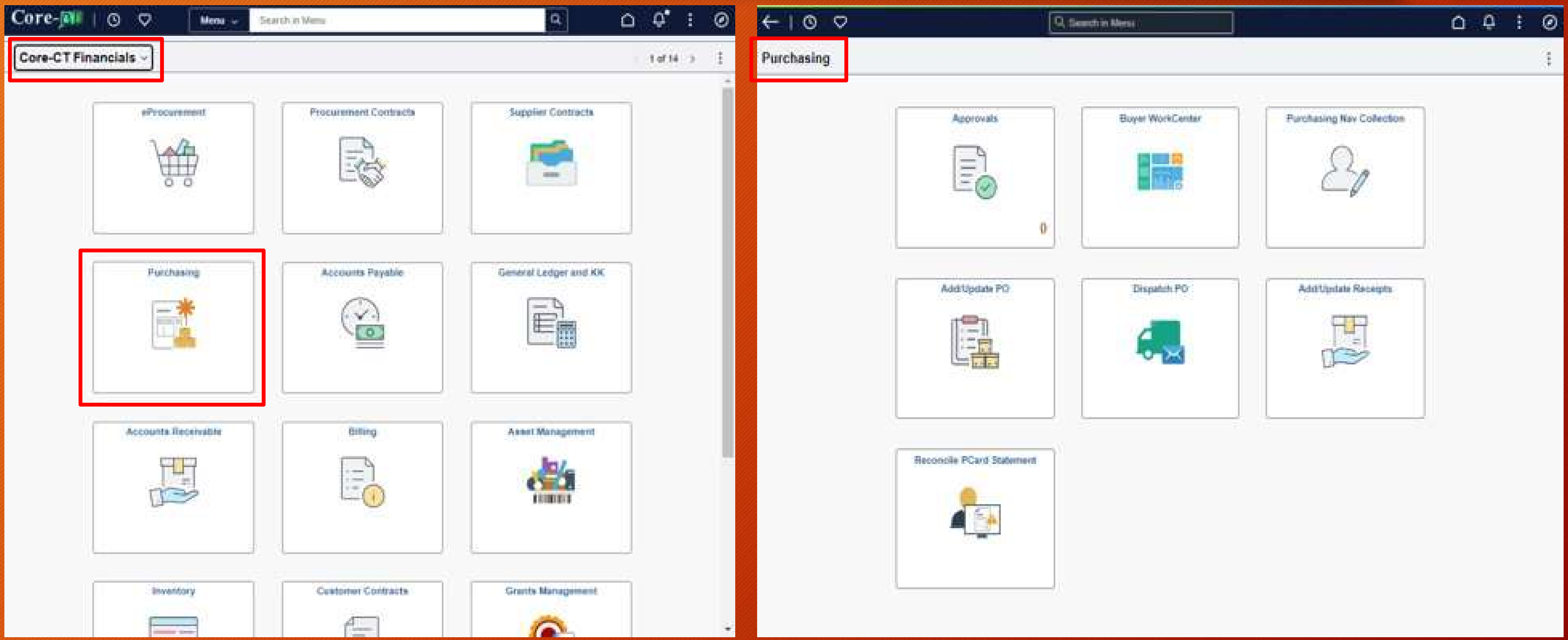
Navigation Agenda

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

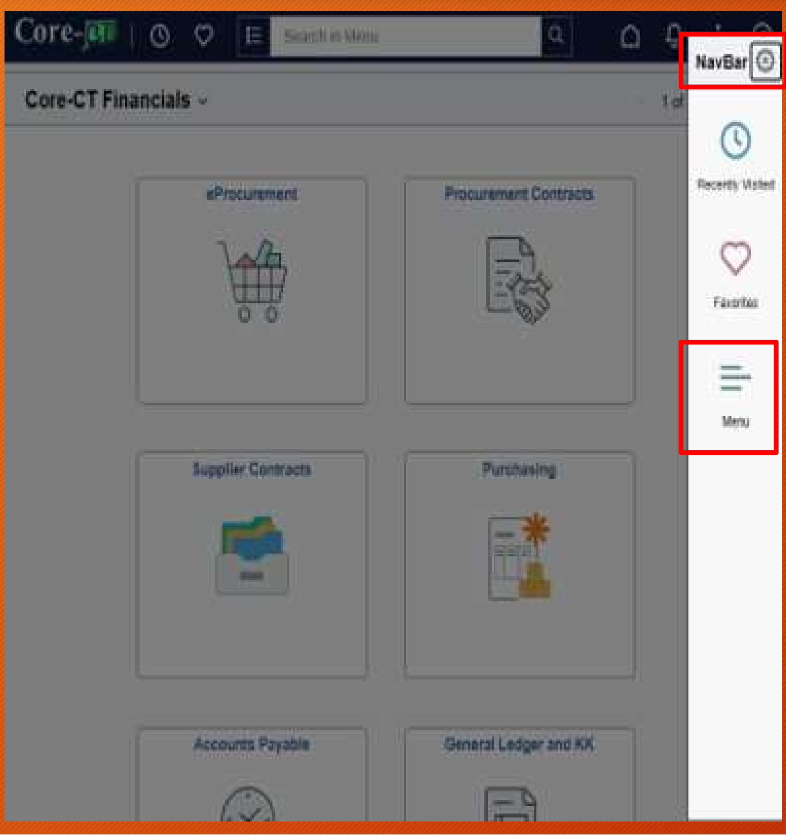
Navigation – Home Page

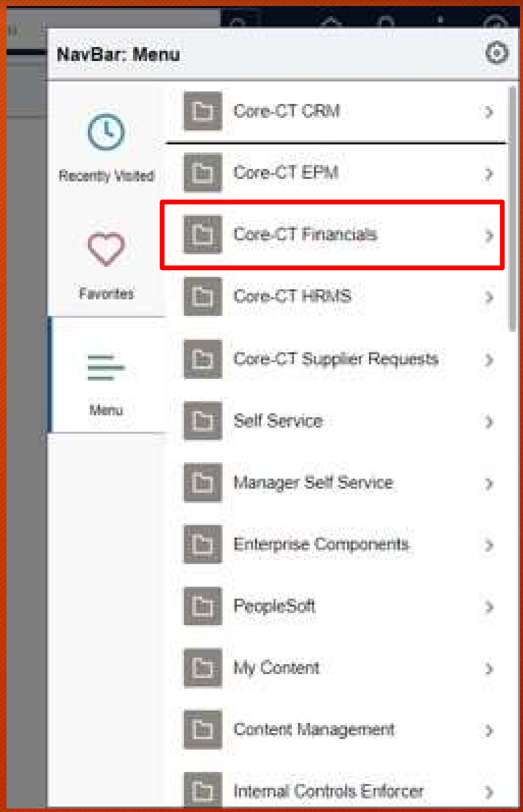


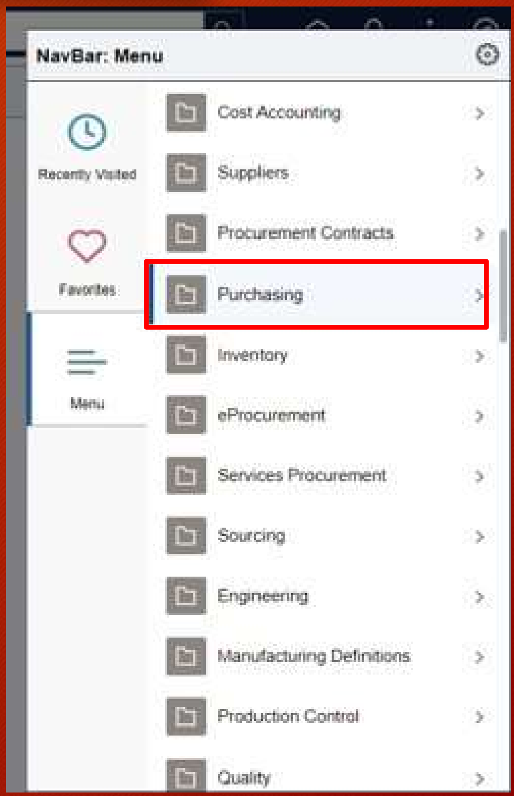
Navigation - Tiles



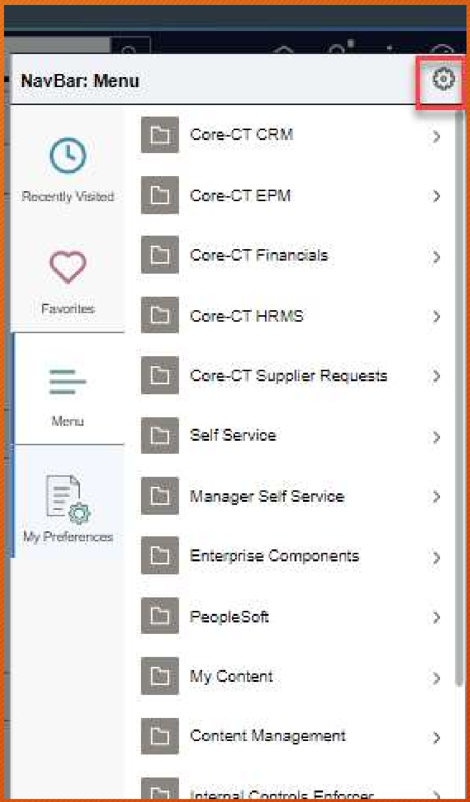
Navigation – Nav Bar Menu

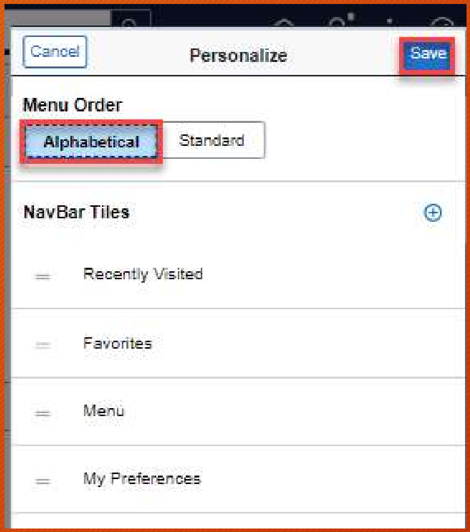




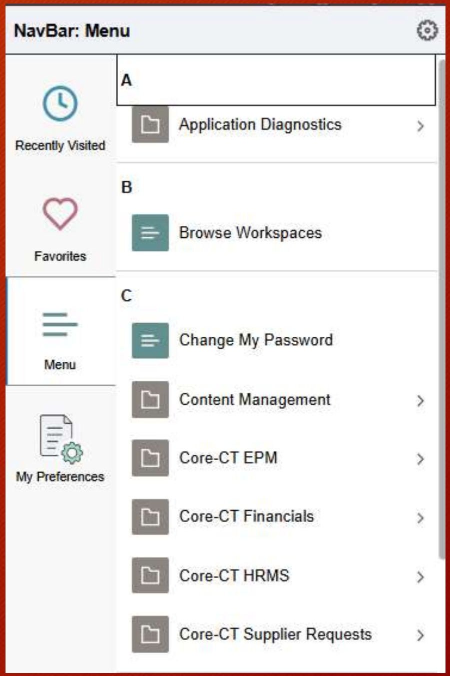


Nav Bar Menu - Alphabetize



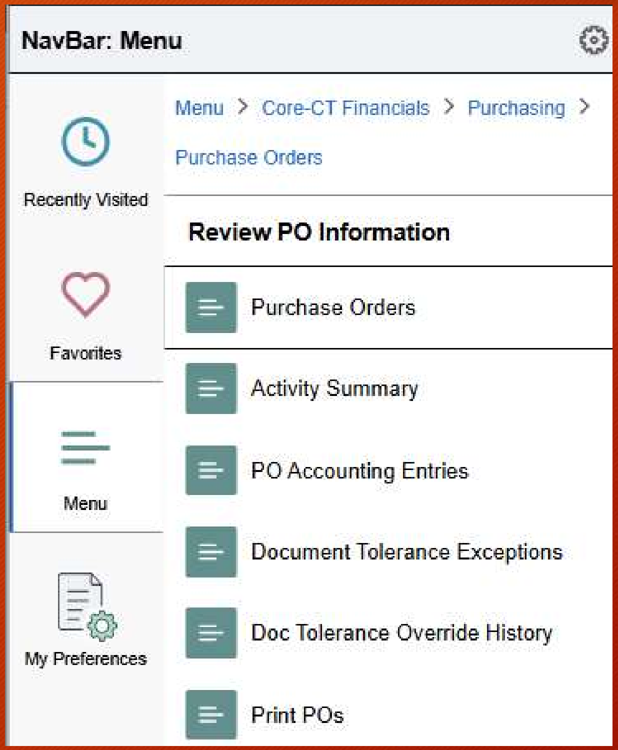


- Click the settings icon
- Click Alphabetical
- Click Save



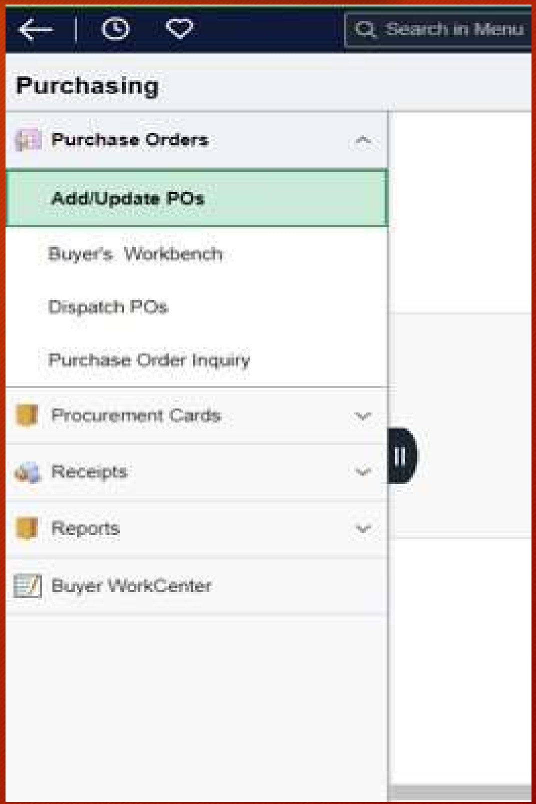
Nav Bar Menu – Bread Crumbs

- 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

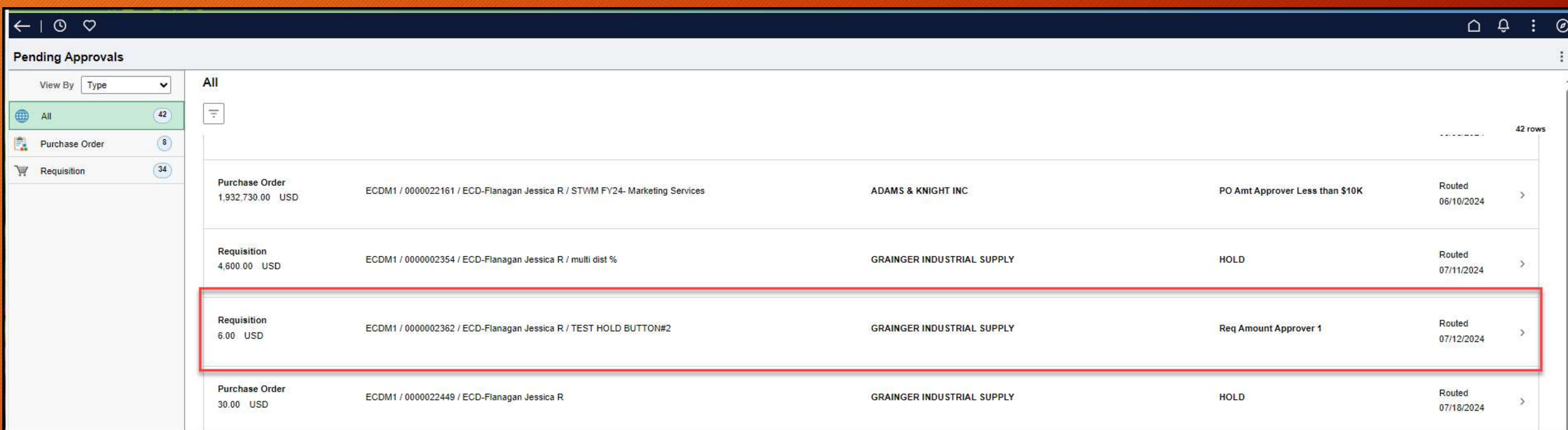
- Approvals – Fluid
- Notifications Bell
- Notifications – Settings
- Notifications – Actions/Alerts

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.

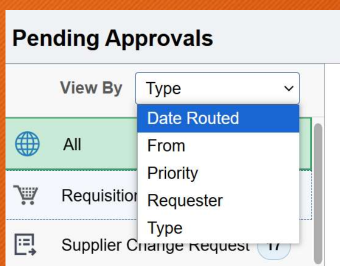
Approvals – Fluid

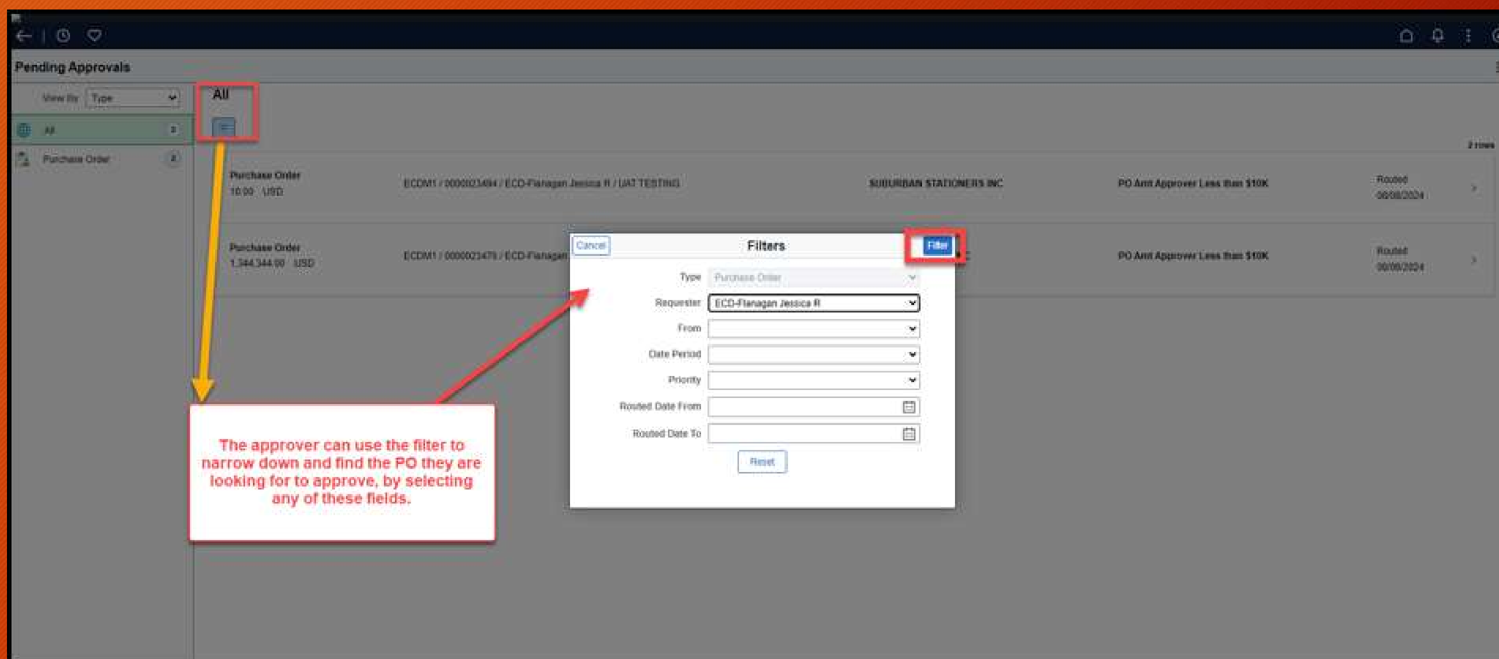
- This is the Pending Approvals page that the previous tile brings you to.



Approvals – Fluid

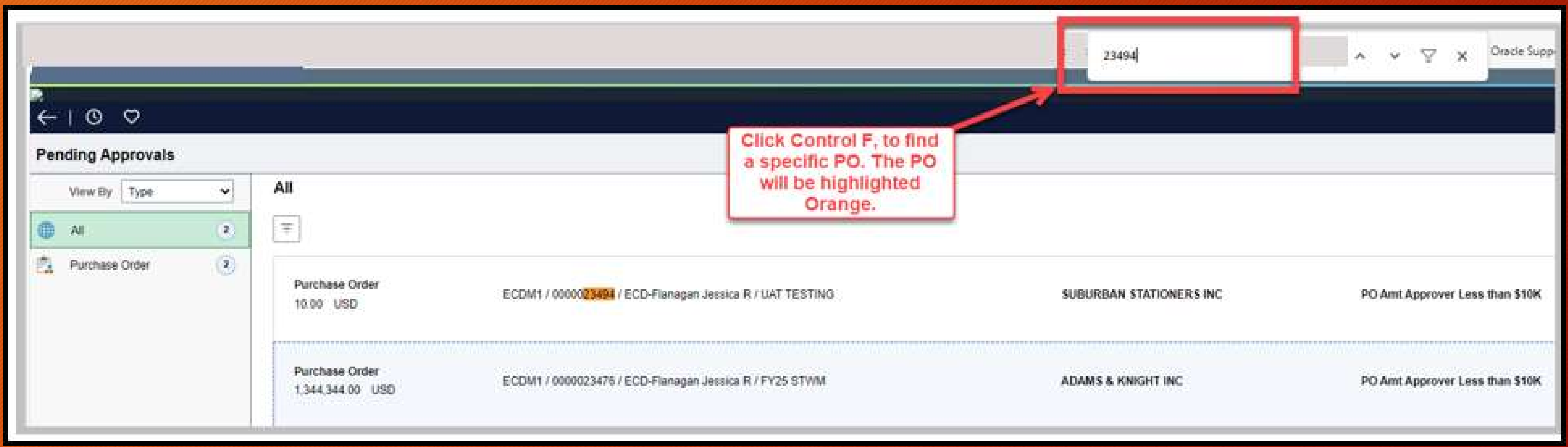
- Approvers can use the filter options to narrow down their list when looking for a specific transaction to approve.





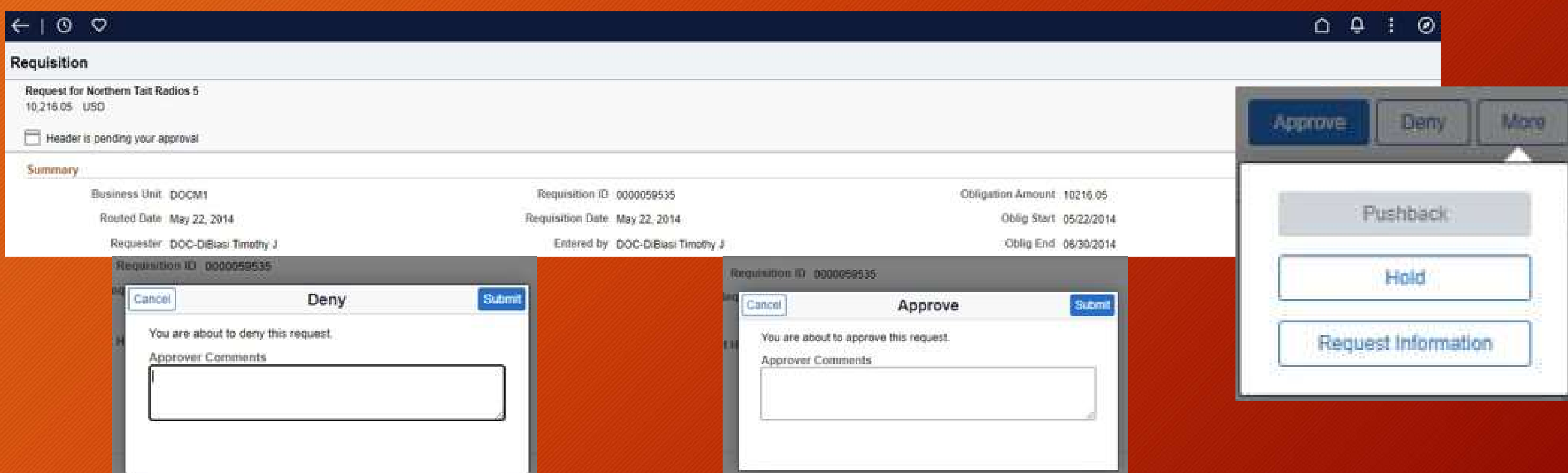
Approvals - Fluid

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



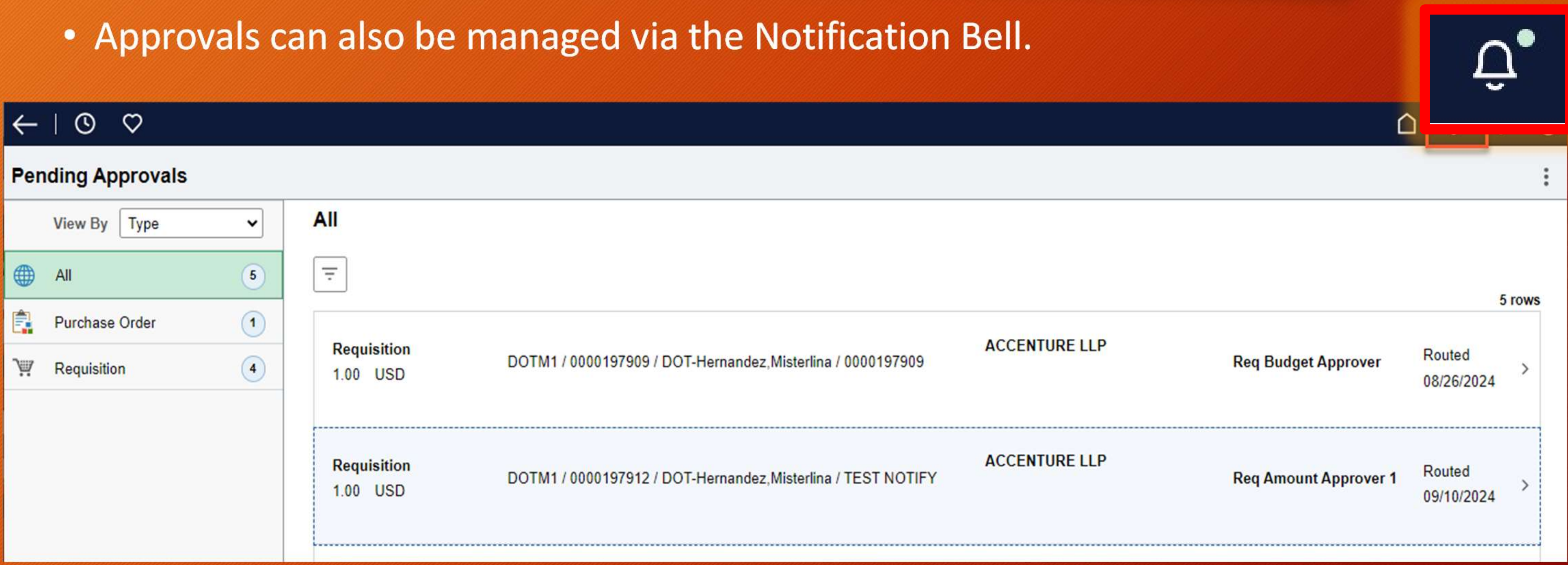
Approvals – Fluid

- 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.



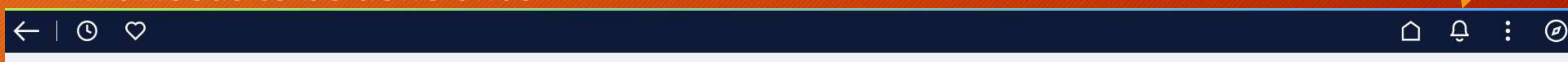
Notifications – Bell

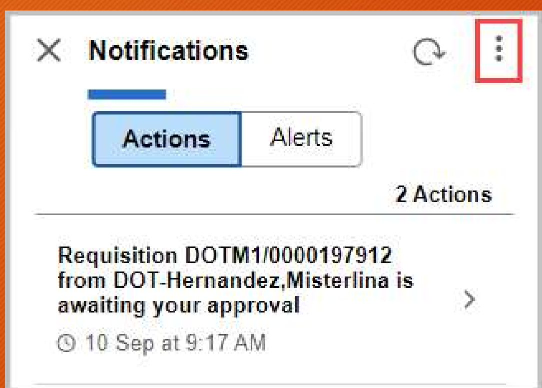
- Approvals can also be managed via the Notification Bell.

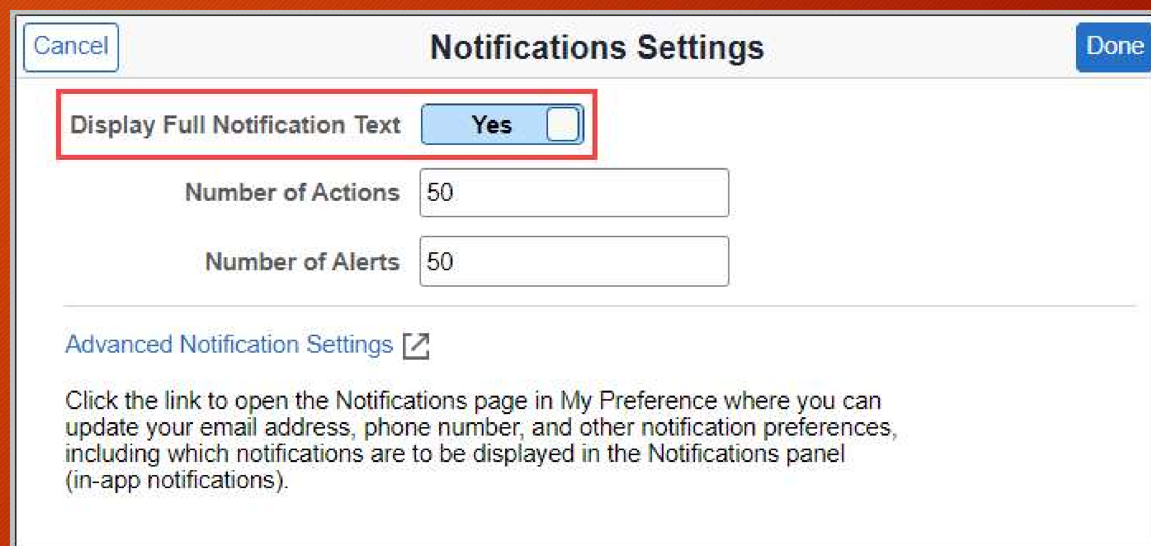


Notifications - Settings

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



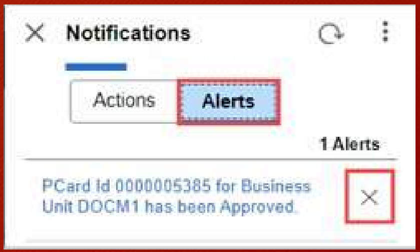




Notification – Actions/Alerts

- 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…

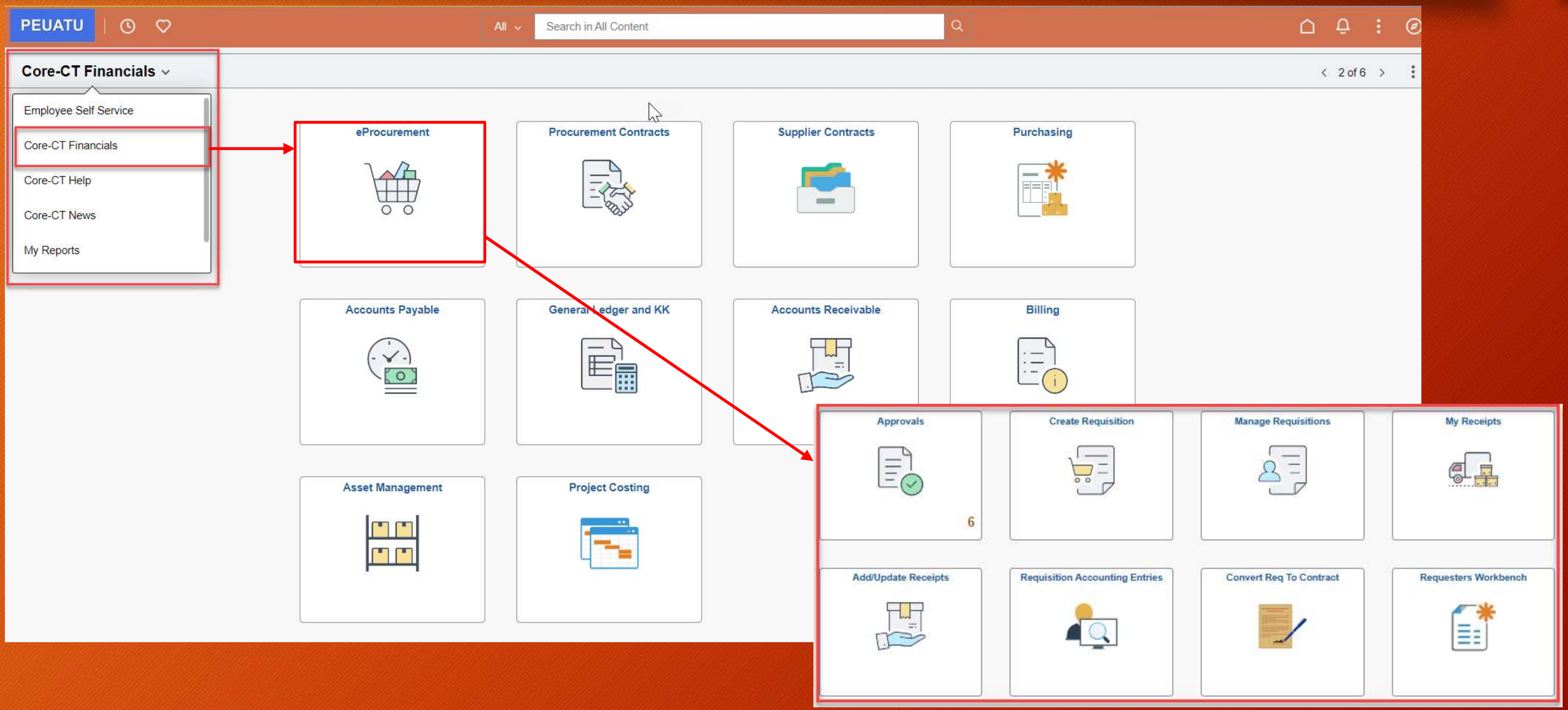
eProcurement

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

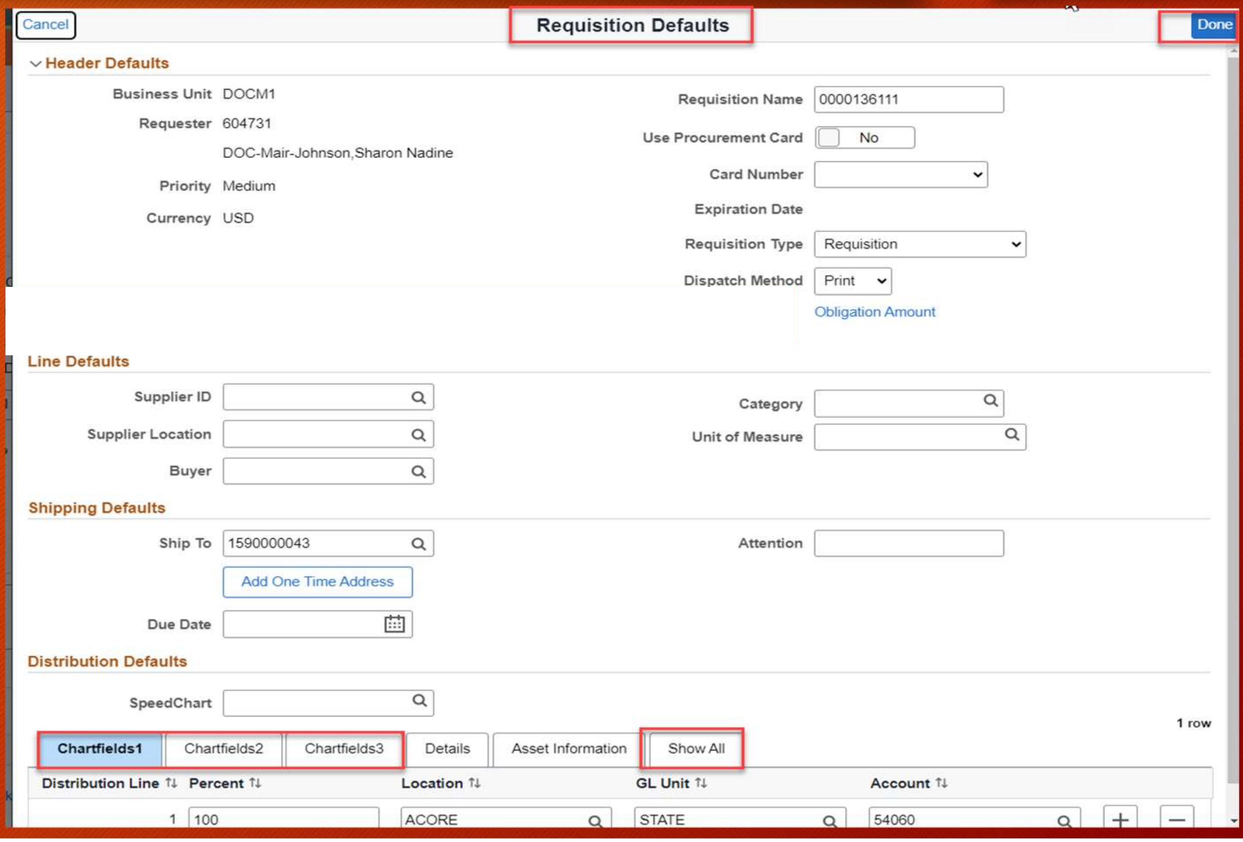


Create Requisition

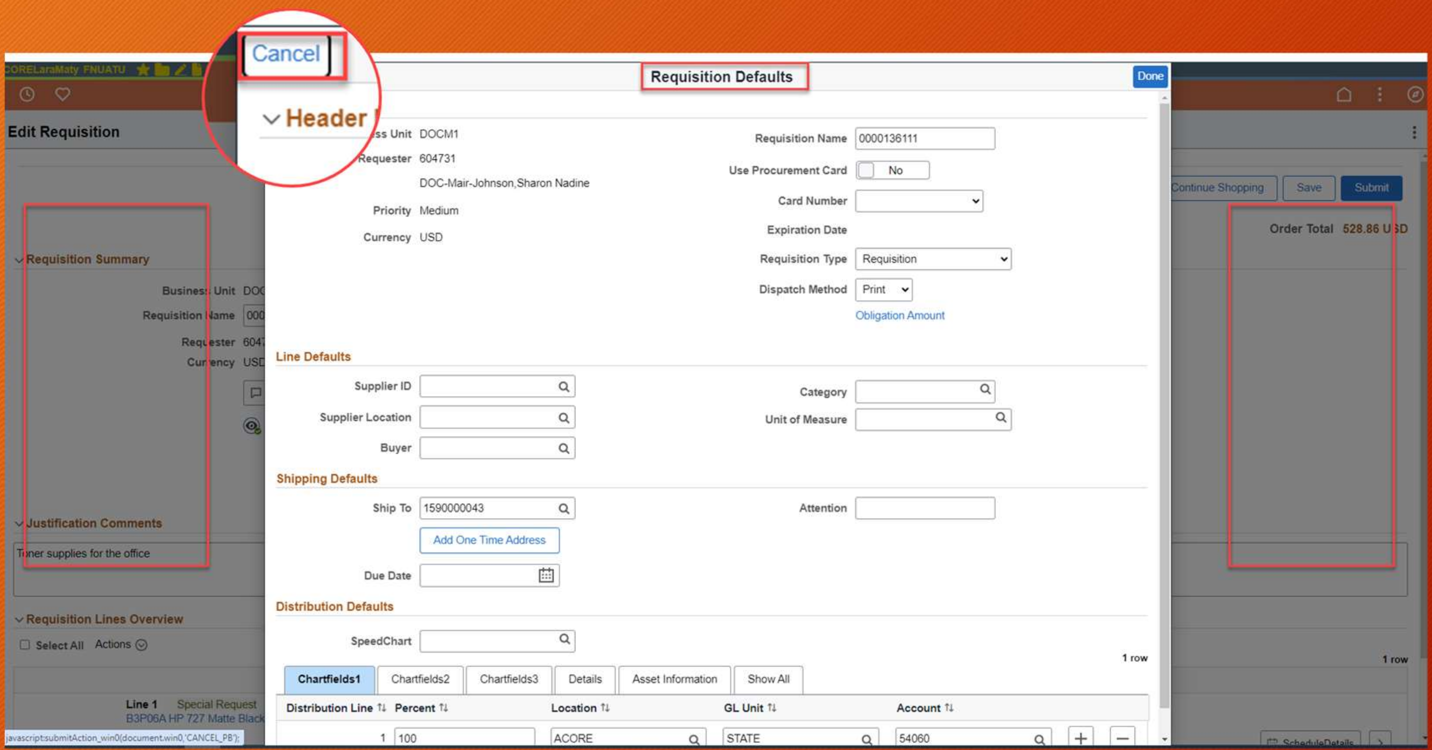
Core-CT Financials> eProcurement tile> Create Requisition tile

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 – (Continued)

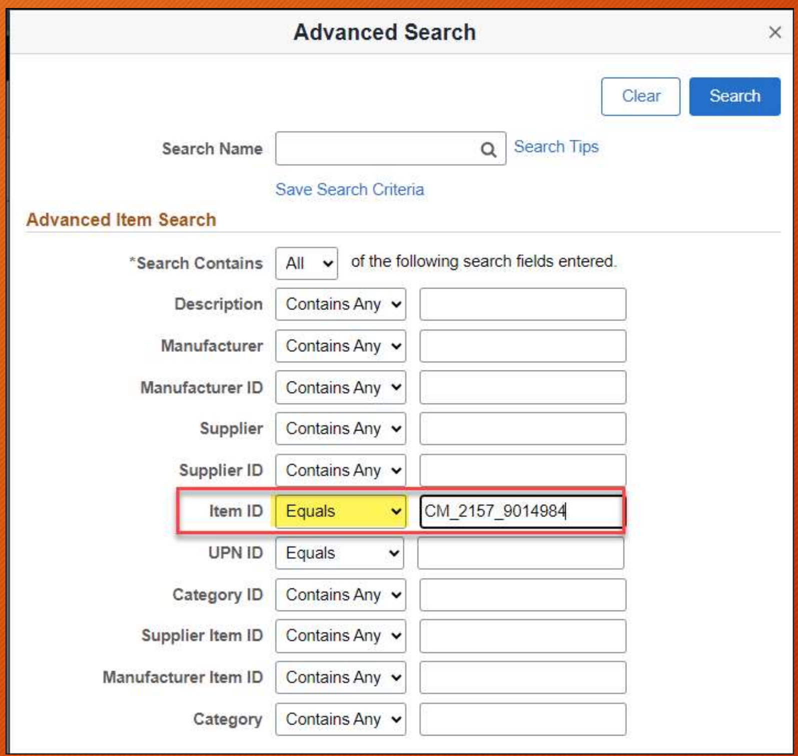


TIP:

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.

Catalog Search



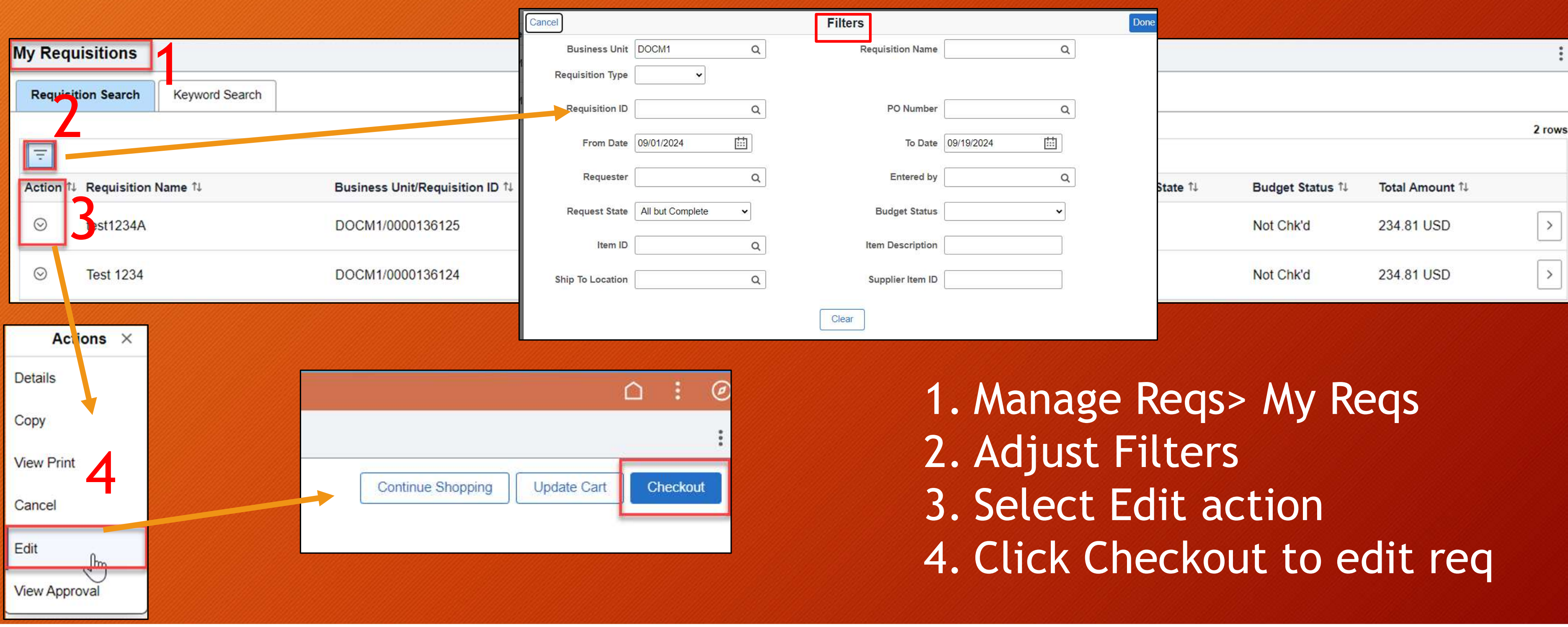
- To search the Catalog by item ID, change the operand from Contains Any to "Equal".
- Oracle removed the ability to Search by Contract ID. We are working or re-adding it soon.

Manage Requisitions/ My Requisitions

Core-CT Financials> eProcurement tile> Manage Requisitions tile

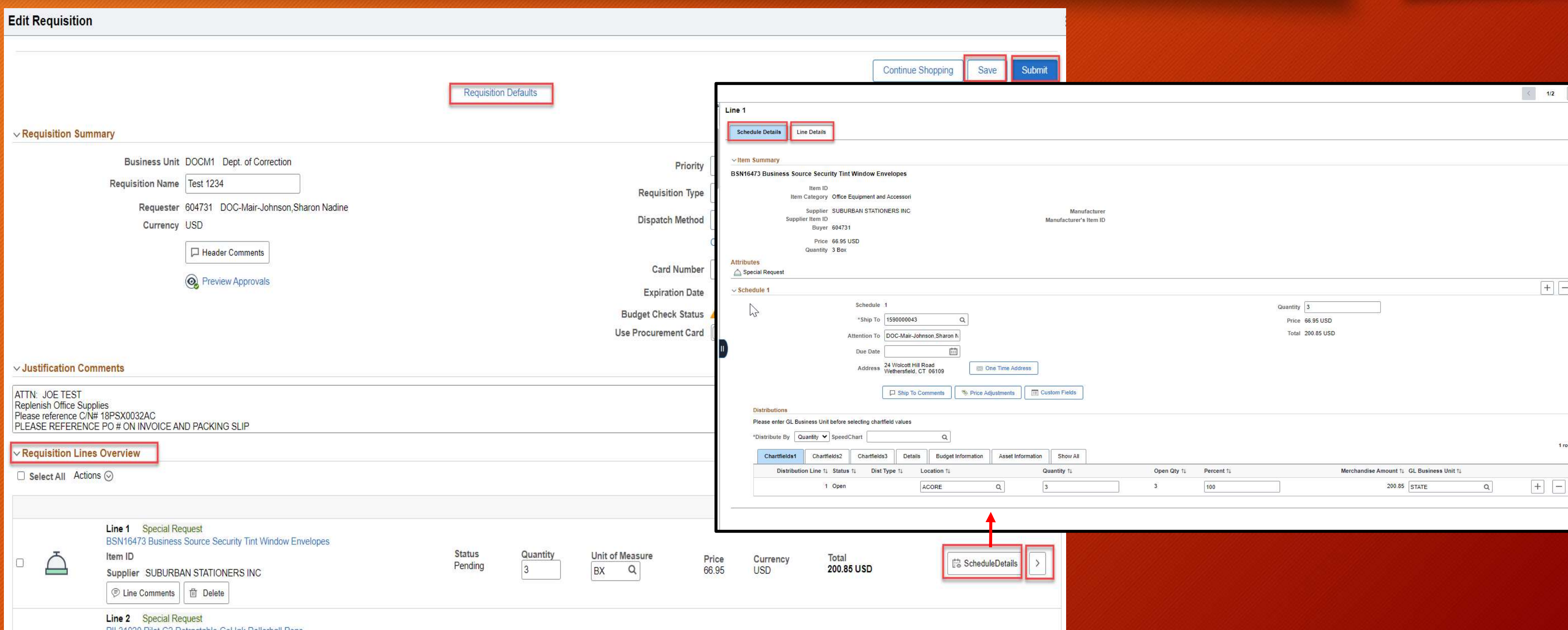
Manage Requisitions/ My Requisitions – Continued

Core-CT Financials> eProcurement tile> Manage Requisitions tile

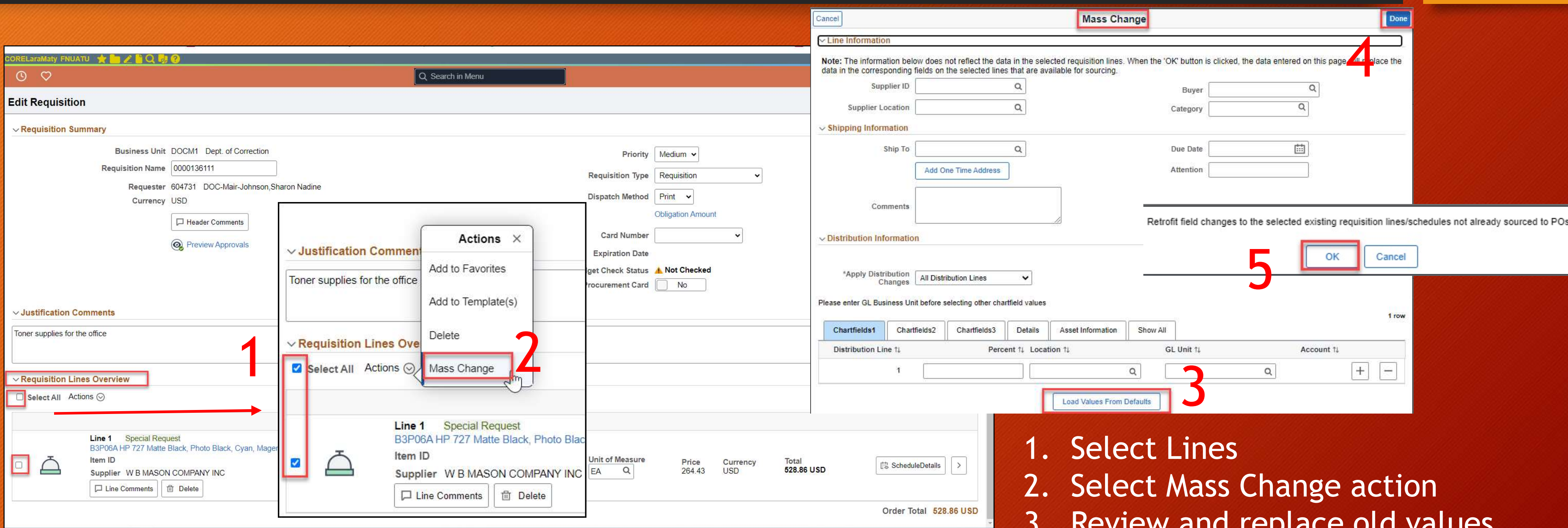


1. Manage Reqs> My Reqs
2. Adjust Filters
3. Select Edit action
4. Click Checkout to edit req

Edit Requisition



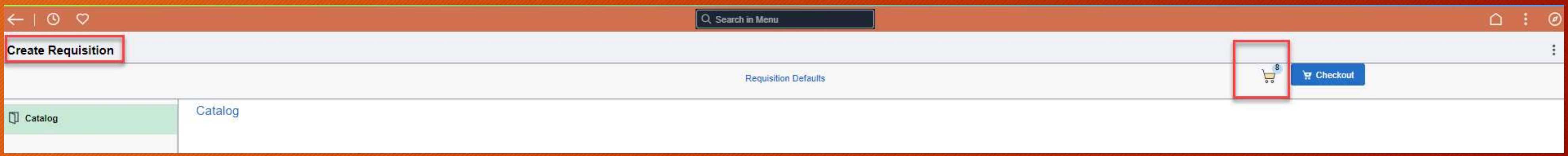
Mass Change Action



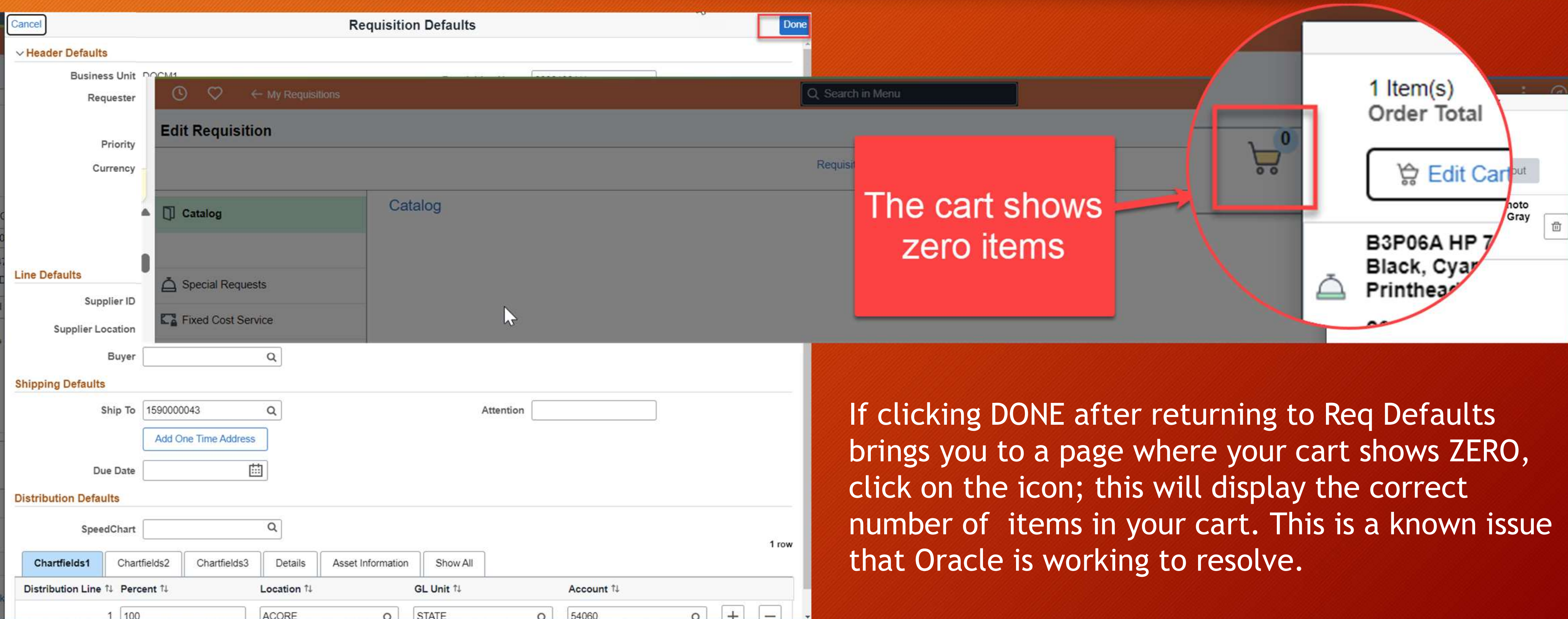
1. Select Lines
2. Select Mass Change action
3. Review and replace old values
4. Click Done
5. Click OK

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



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.

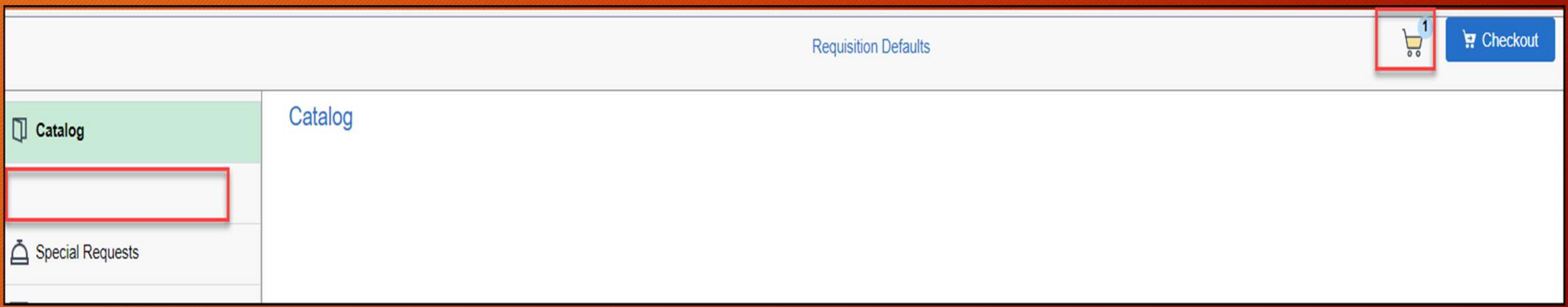
Persistent Cart - Continued

<u>TIPS</u>:

- 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

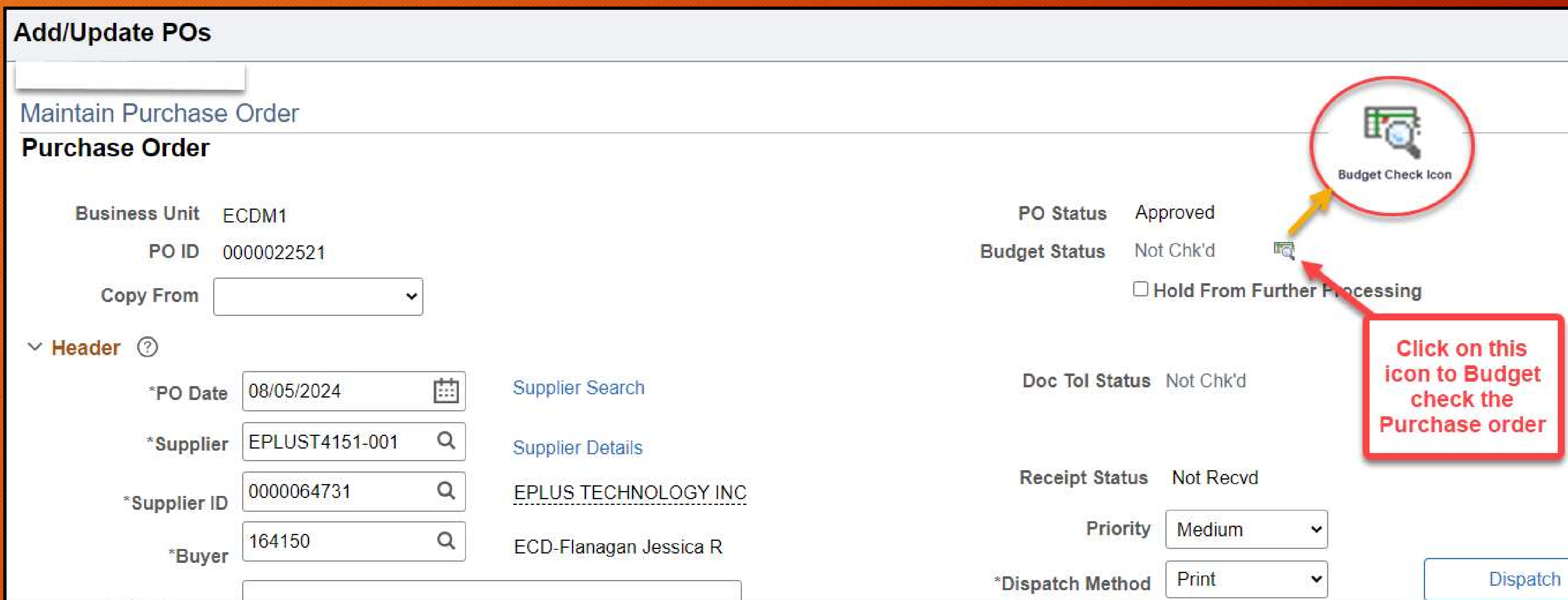
Michele Richmond

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

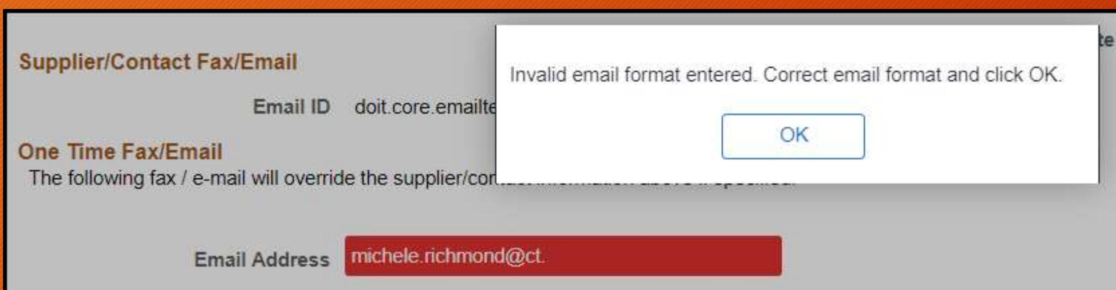
Budget Check a Purchase Order

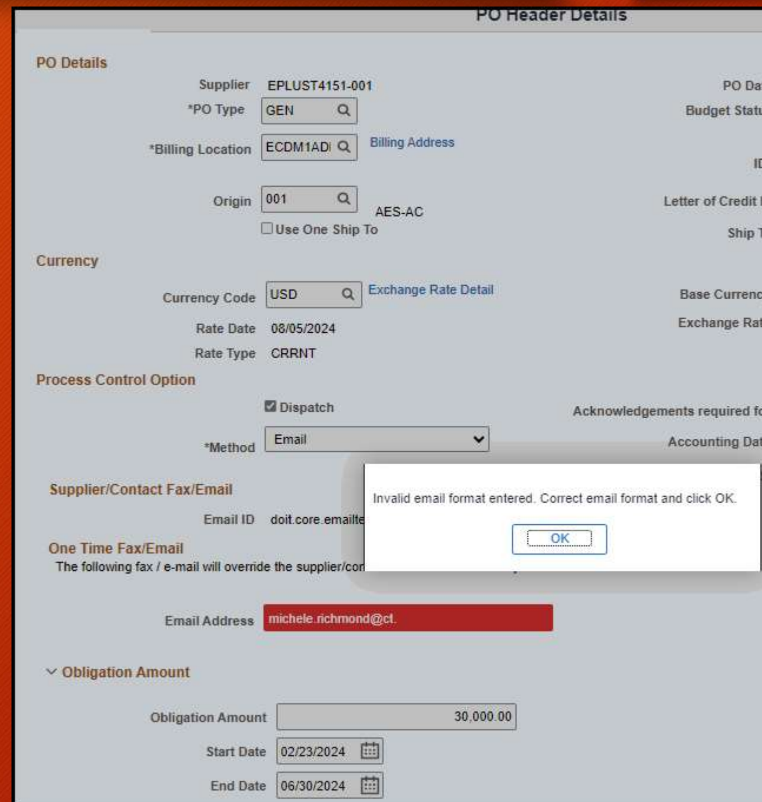
Budget Check is now available on the PO header!



Email Validation on a Purchase Order

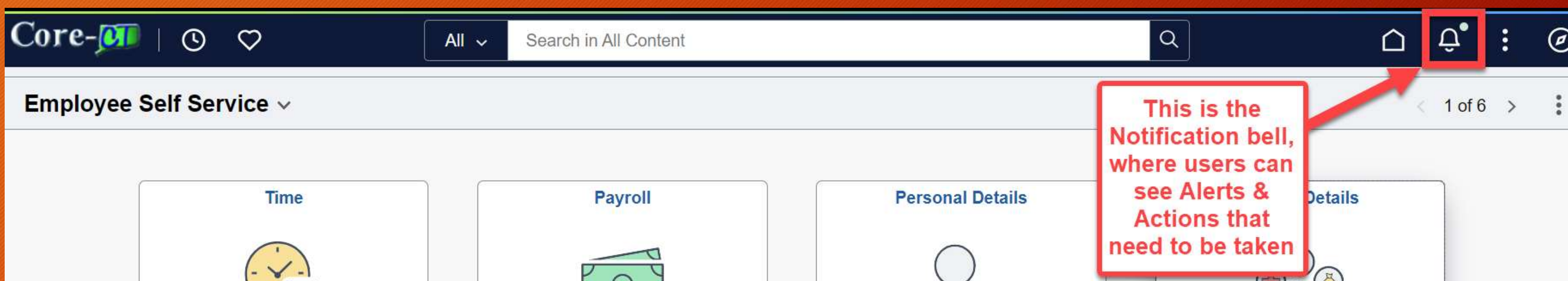
- Email Validation has been added to Purchase Orders





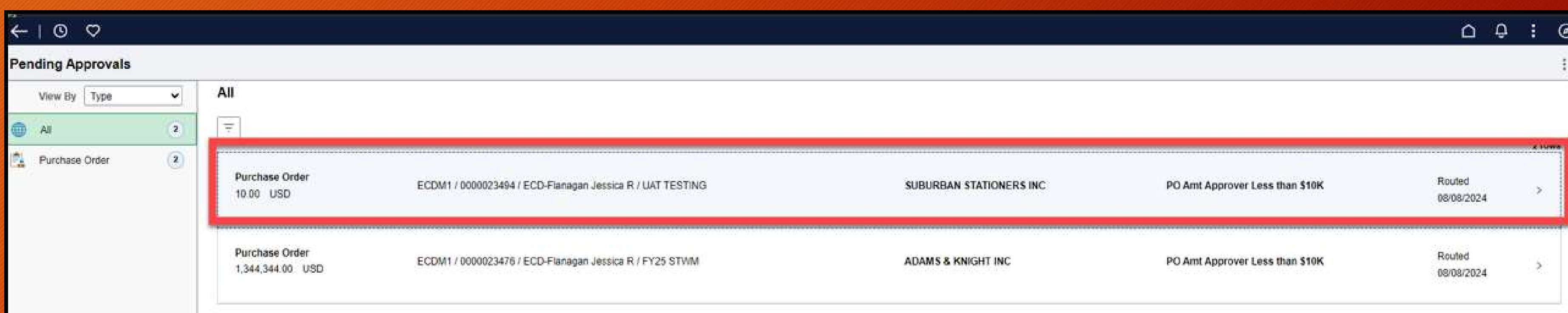
Notification Bell: The Buyers Workflow

- 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



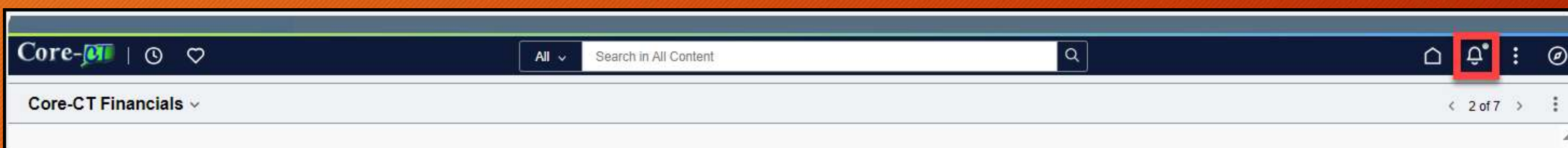
Purchasing Approval - Fluid

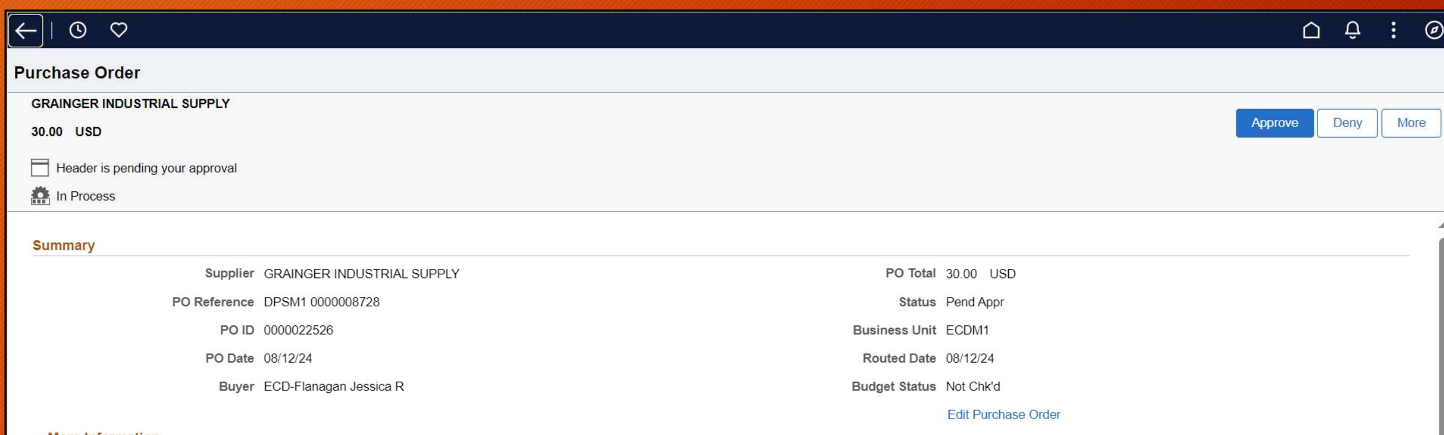
Purchasing Approvals are now through the Fluid Approval Tile

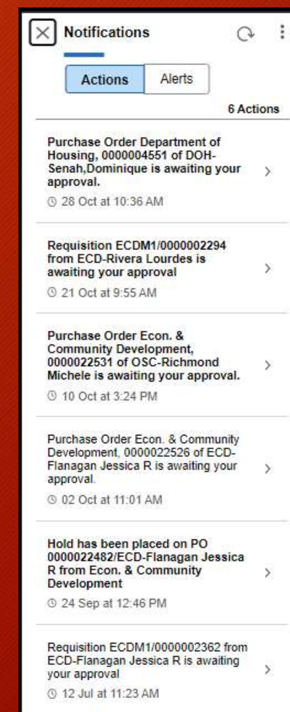


Approvals – Notification Bell

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.

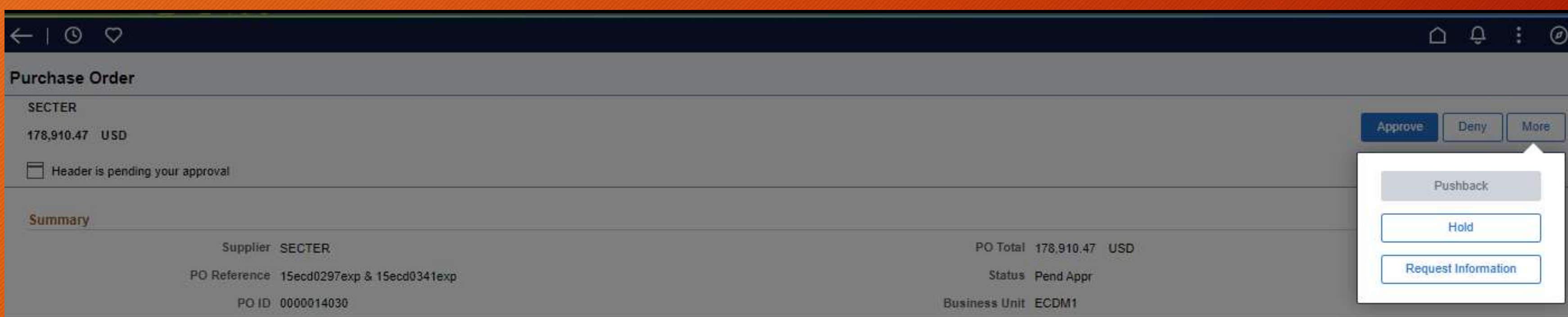




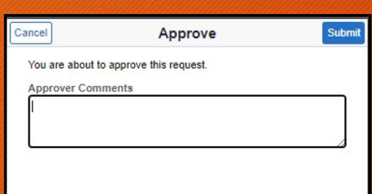


Approver Options

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



Does not Require a Comment

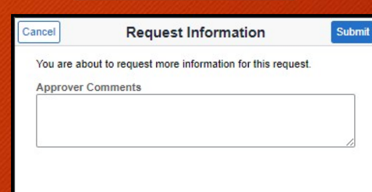


OR

Requires a Comment

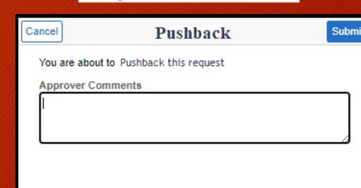
OR

Requires a Comment



OR

Requires a Comment

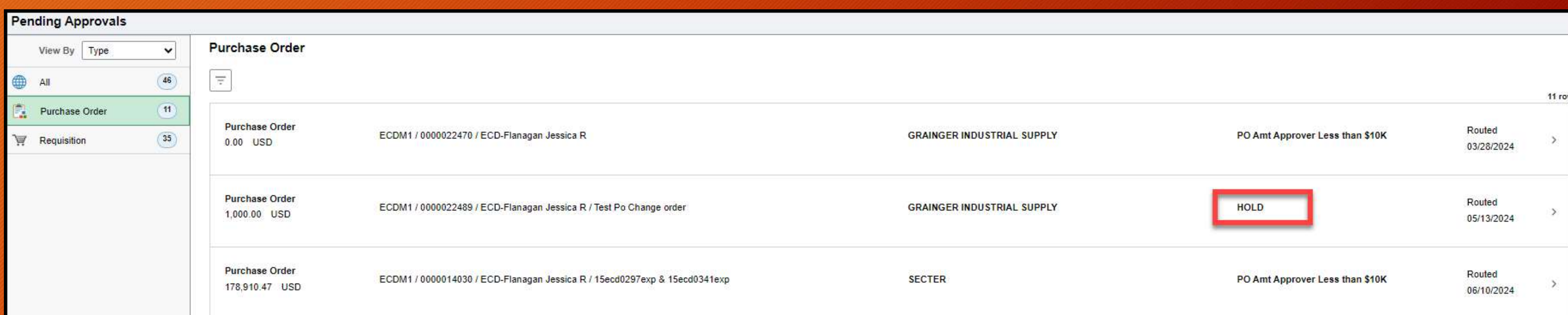


OR

Requires a Comment

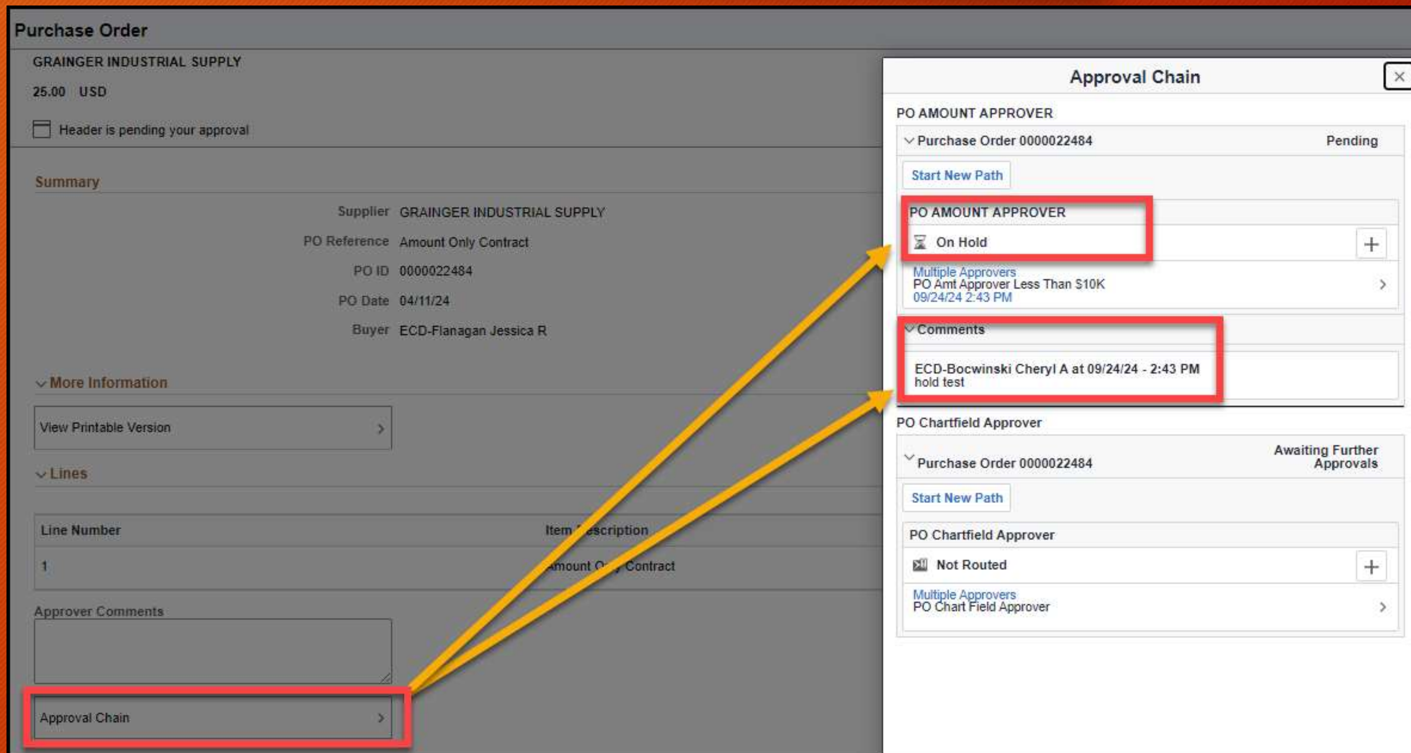
Purchase Order Approvals: HOLD

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



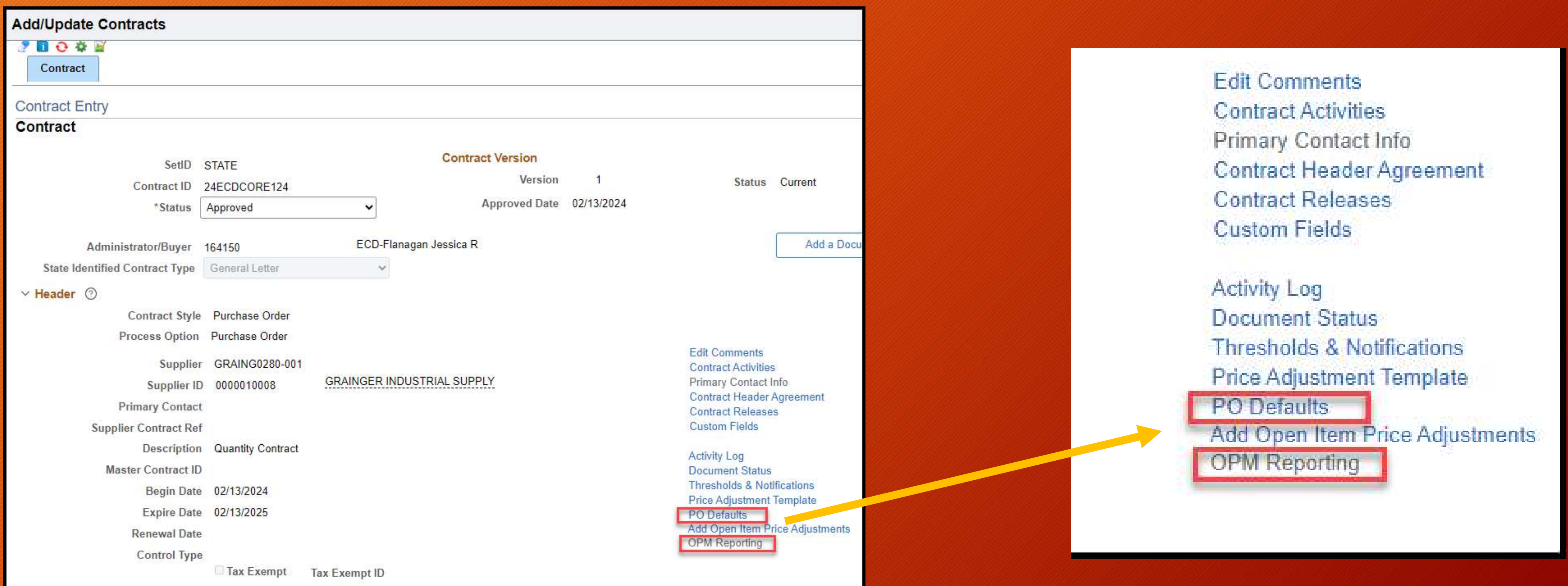
Purchase Order Approvals: Comments & Status

- The approval page on a Purchase Order will no longer shows 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.

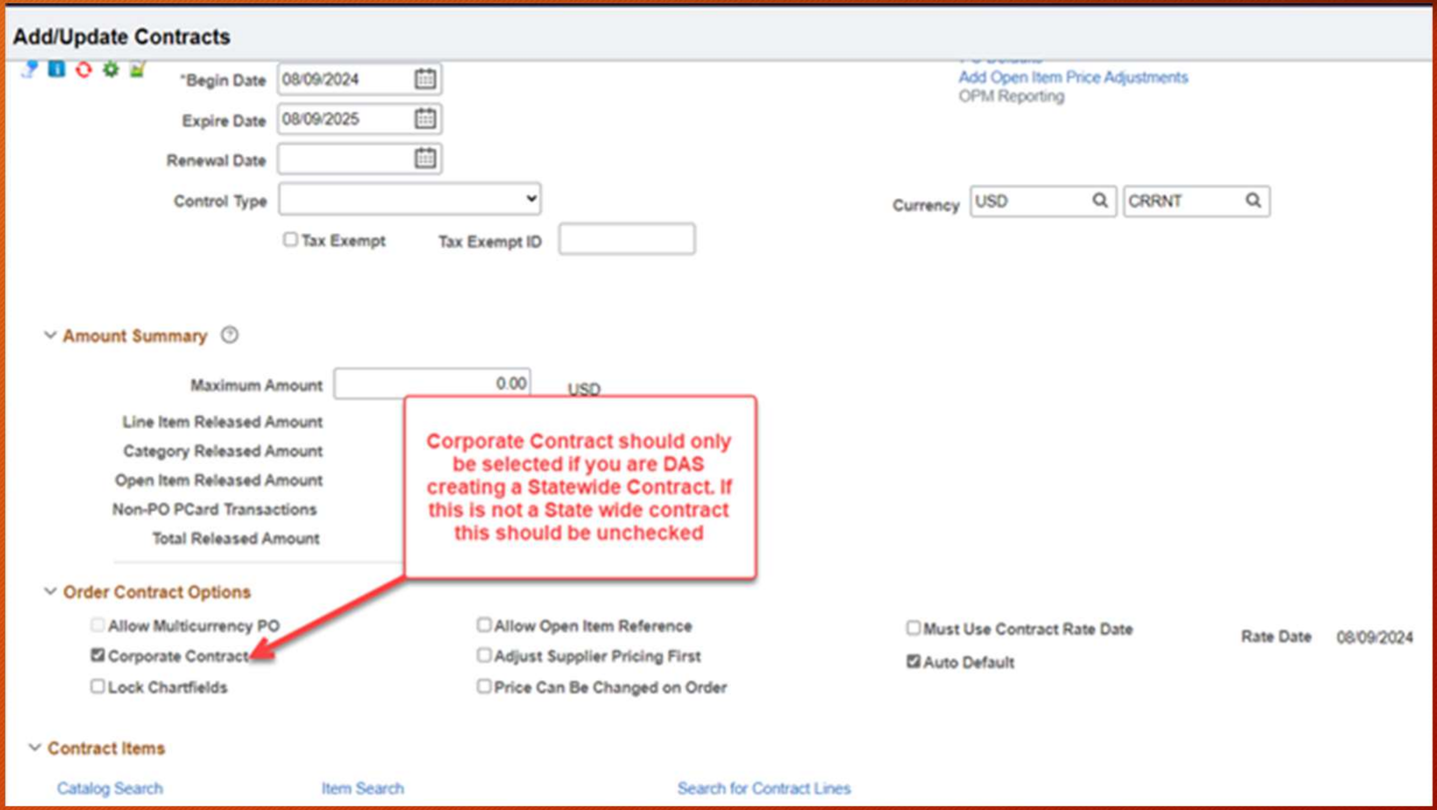


Procurement Contract

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



Procurement Contract



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

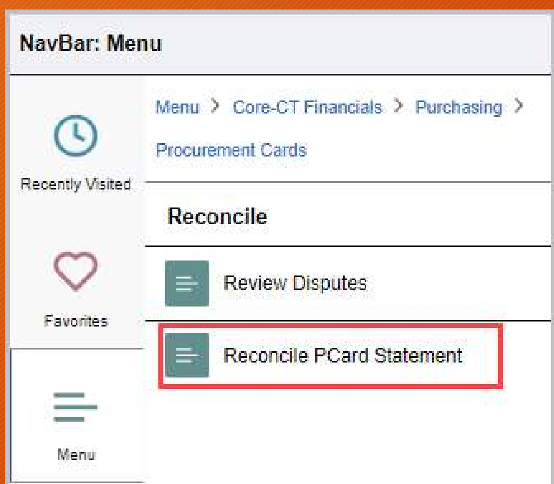
- Card Requests will continue in CORE for JP Morgan until the contract ends.

- Card Requests for U.S. Bank will be handled with their Access Online platform.

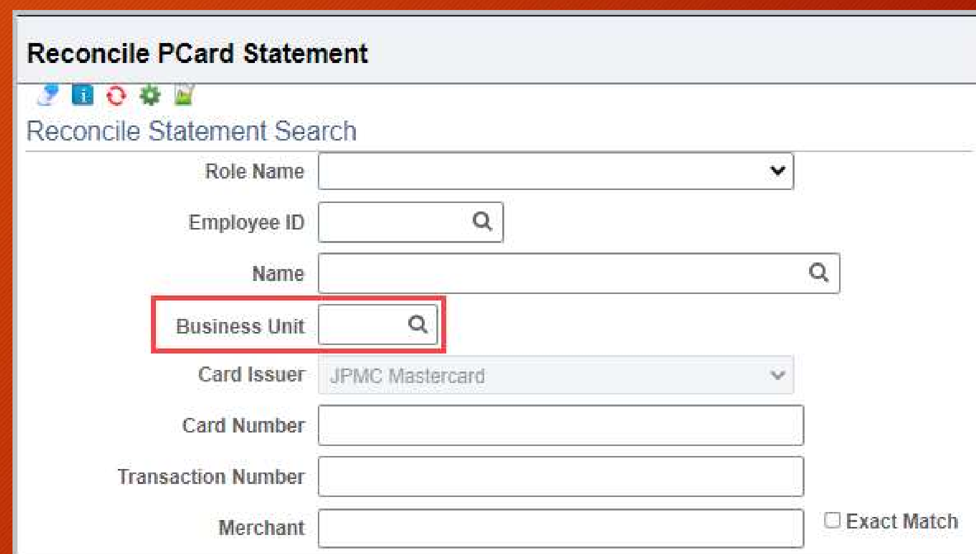
- More to Come

Reconciliation

- Navigation Change
- Reconcile Pcard Statement

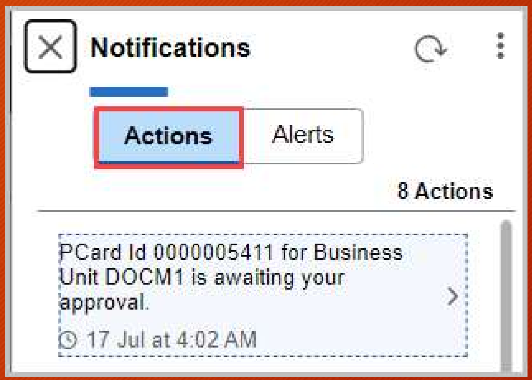


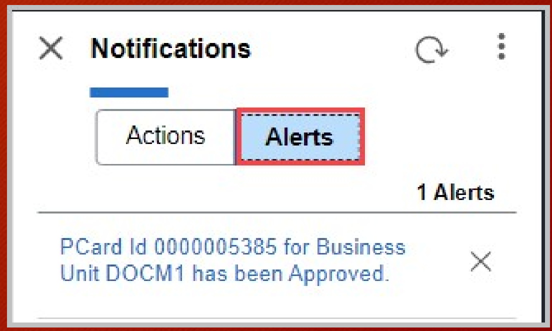
- Business Unit Search



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

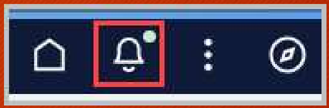
Brian Guilmartin

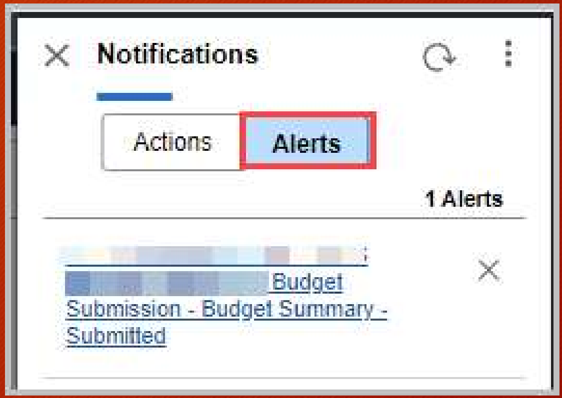
Agenda

- 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

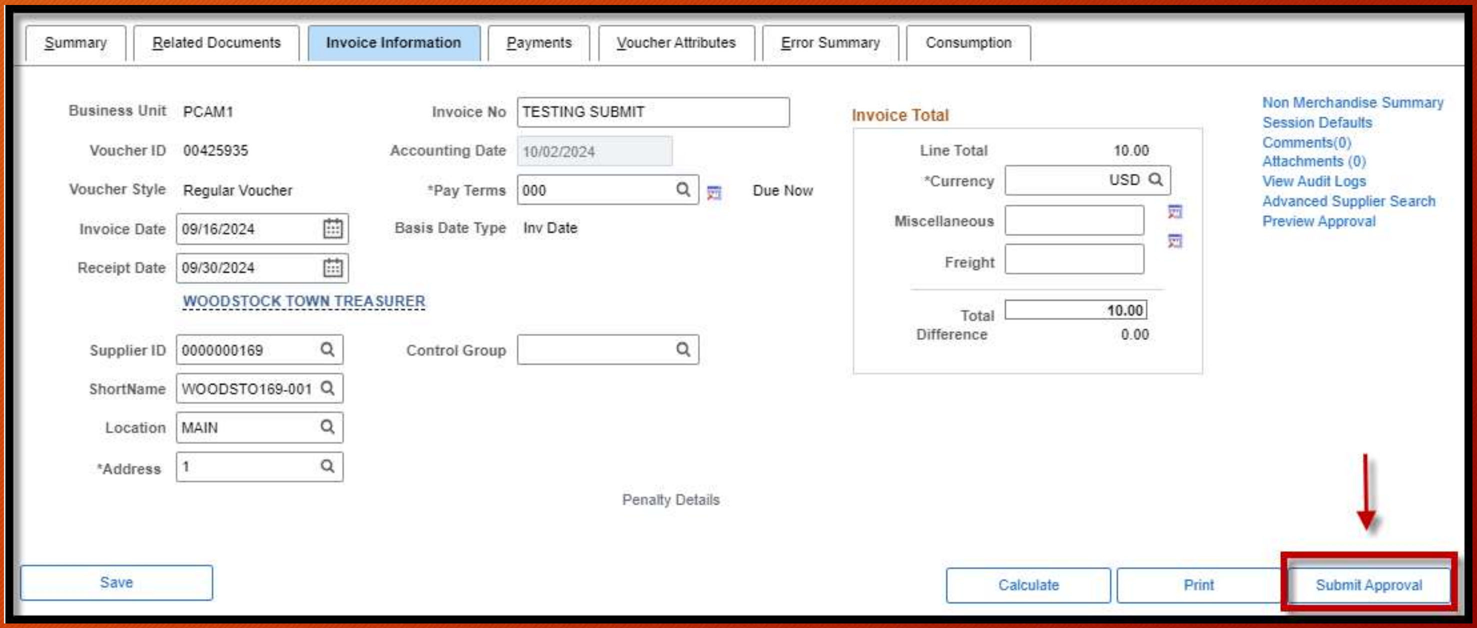
Submitting Vouchers for Approval

- 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

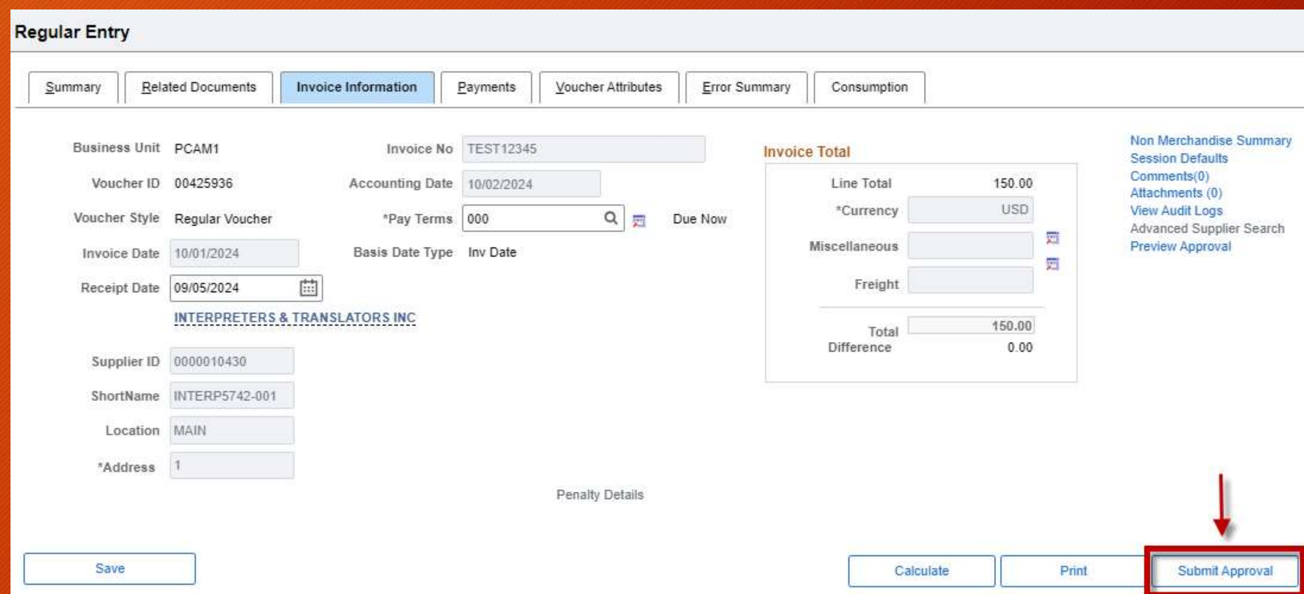
When a non-po voucher is saved, the Submit Approval button appears.

Voucher processors click Submit Approval:



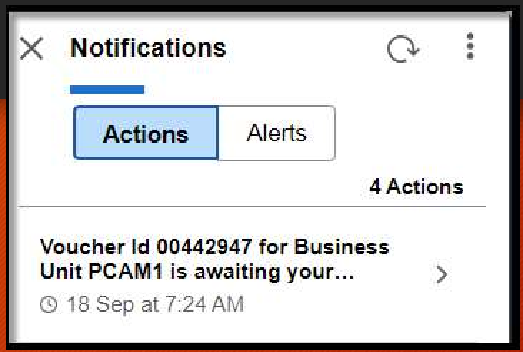
Submitting Vouchers – PO Vouchers

- 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.



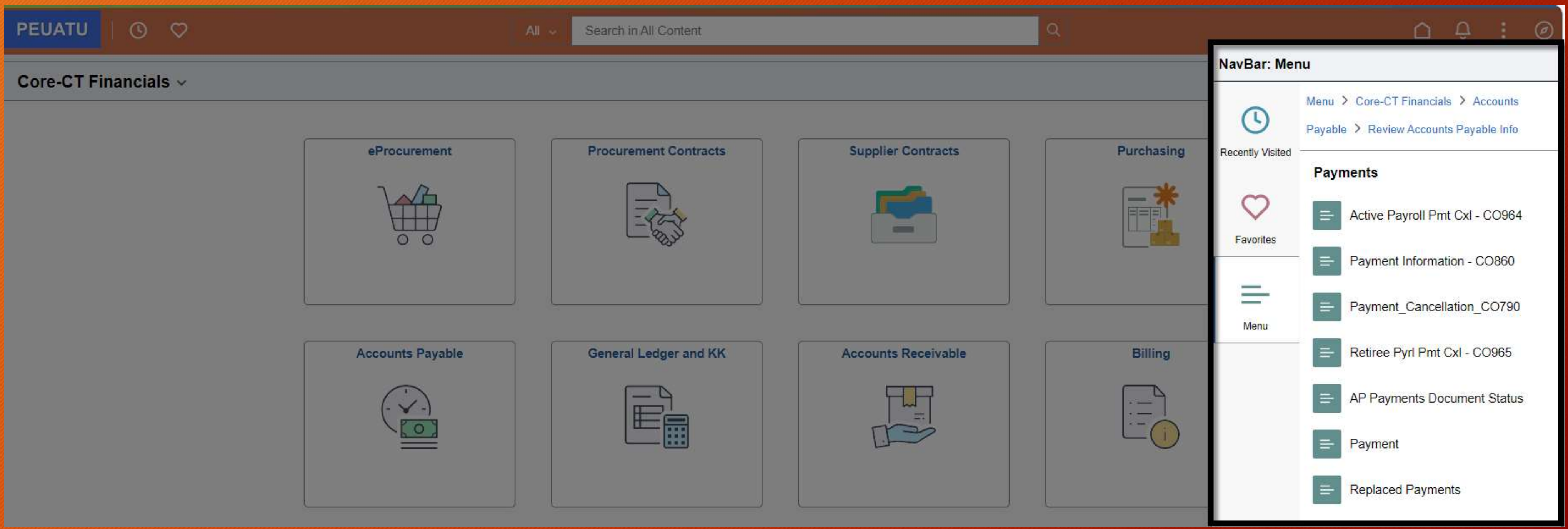
Notifications

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



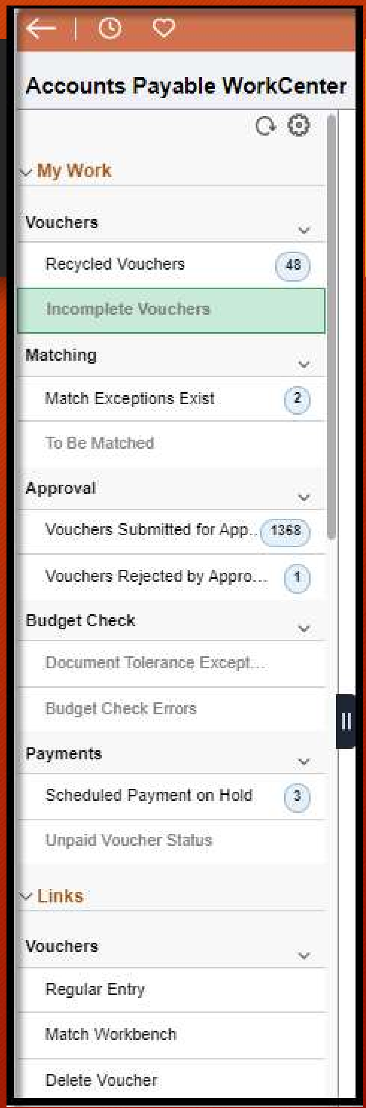
Form Navigation

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.



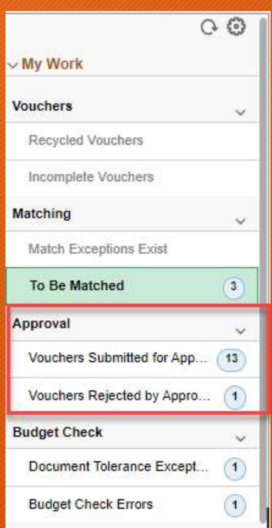
Accounts Payable WorkCenter

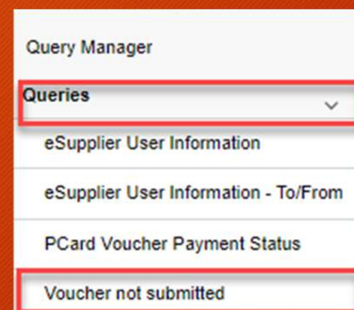
Users have access to the Accounts Payable WorkCenter that compiles all the links and pagelets necessary to carry out transactions, but with less navigation.



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.





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** <u>must</u> assign this role to eligible employee(s) on the first day of go-live

Asset Management Approvals

- Why?

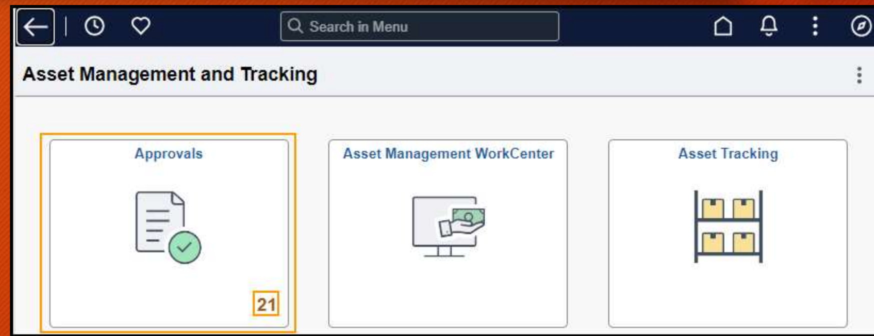
Asset Management Approvals

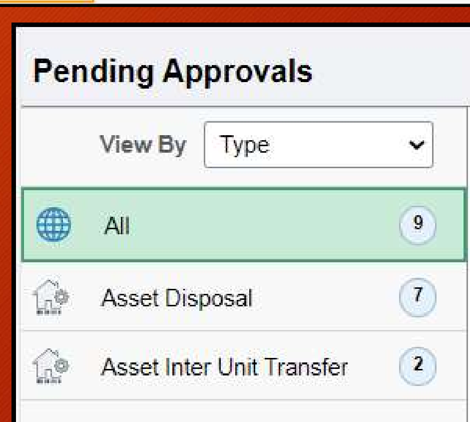
- Central Accounts Payable, Security and Asset Management identified a financial security concern with individual employees removing assets from In Service status unchecked
- Resolution found in having Core-CT implement approvals for those transactions
- This ensures adequate internal controls, just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

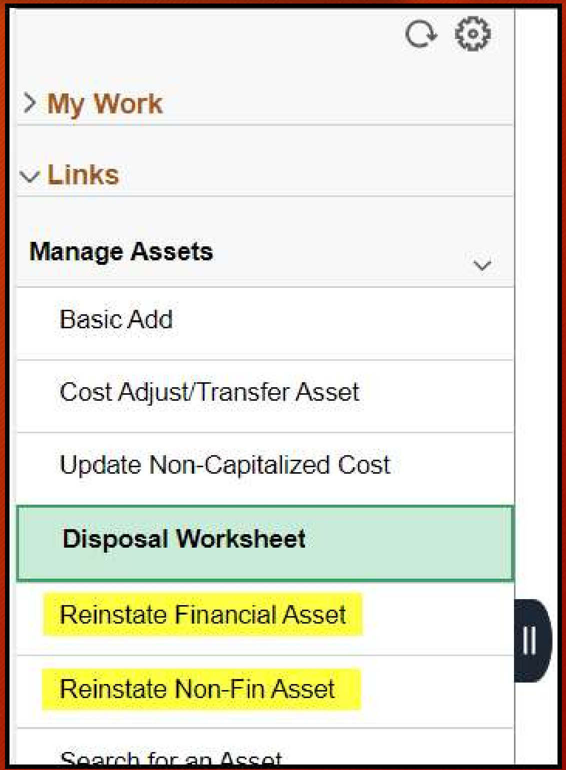




Asset Management Approvals

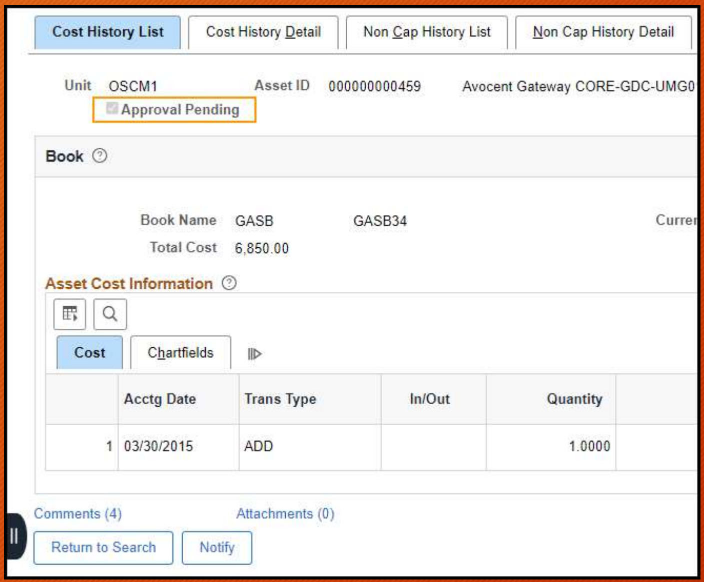
What does this change mean for Asset Teams?

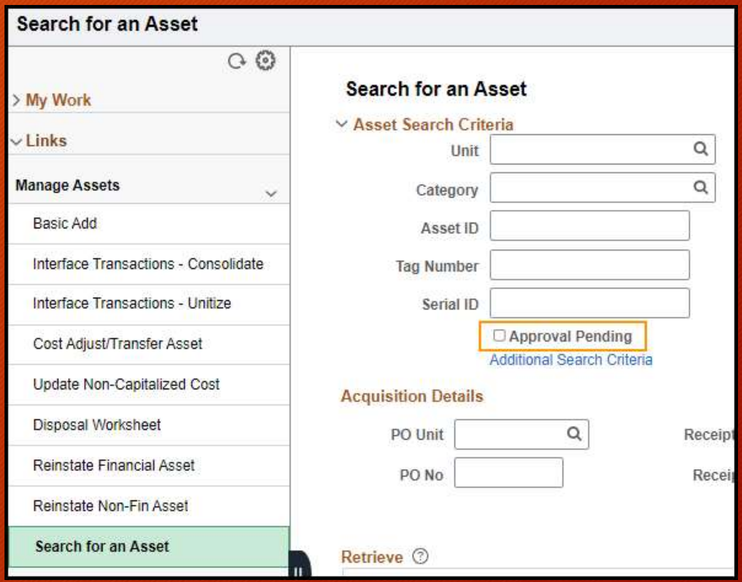
- Financial Asset Processors
  - Disposals and IUTs will route for approval
  - Disposal Authorization should be entered as a new Asset Comment
  - Only the **Disposal Worksheet** page will be used for retiring assets
  - The single asset retirement page links have been renamed to Reinstate
    - These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



Asset Management Approvals

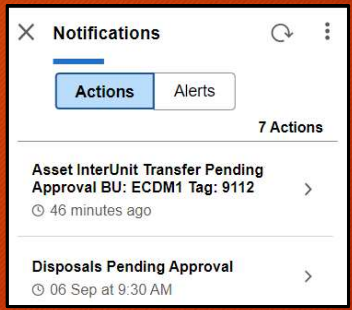
1. Assets cannot be transacted on further while they have a pending approval
2. The **Approval Pending** indicator will appear on the asset's Review Cost page
3. All assets currently pending approval can be found on **Search for an Asset**



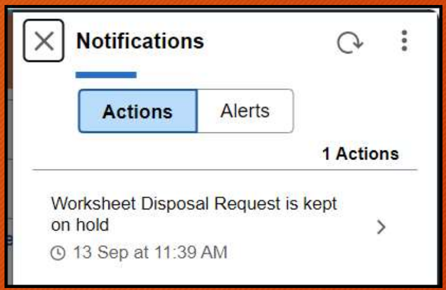


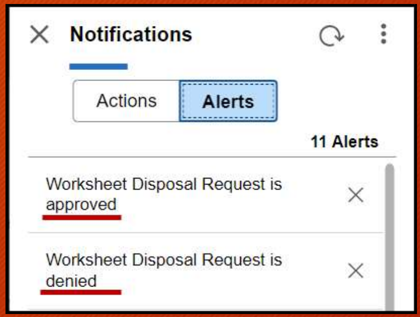
AM Approval Notifications

- Disposals can include many assets, so detail in notifications in 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

AA

Asset.Approver@ct.gov

To FinancialAsset.Processor@ct.gov

Fri 9/20

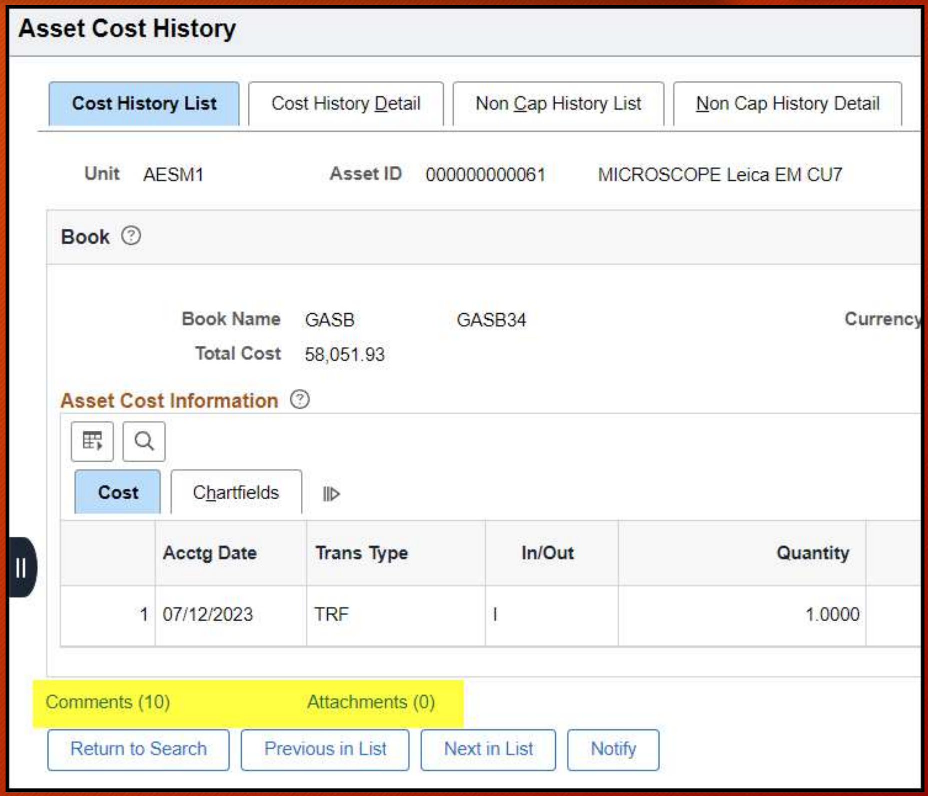
Your disposal request has been partially or fully APPROVED. A new retirement interface is pending for your Asset Processor to load and finalize the retirement.

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

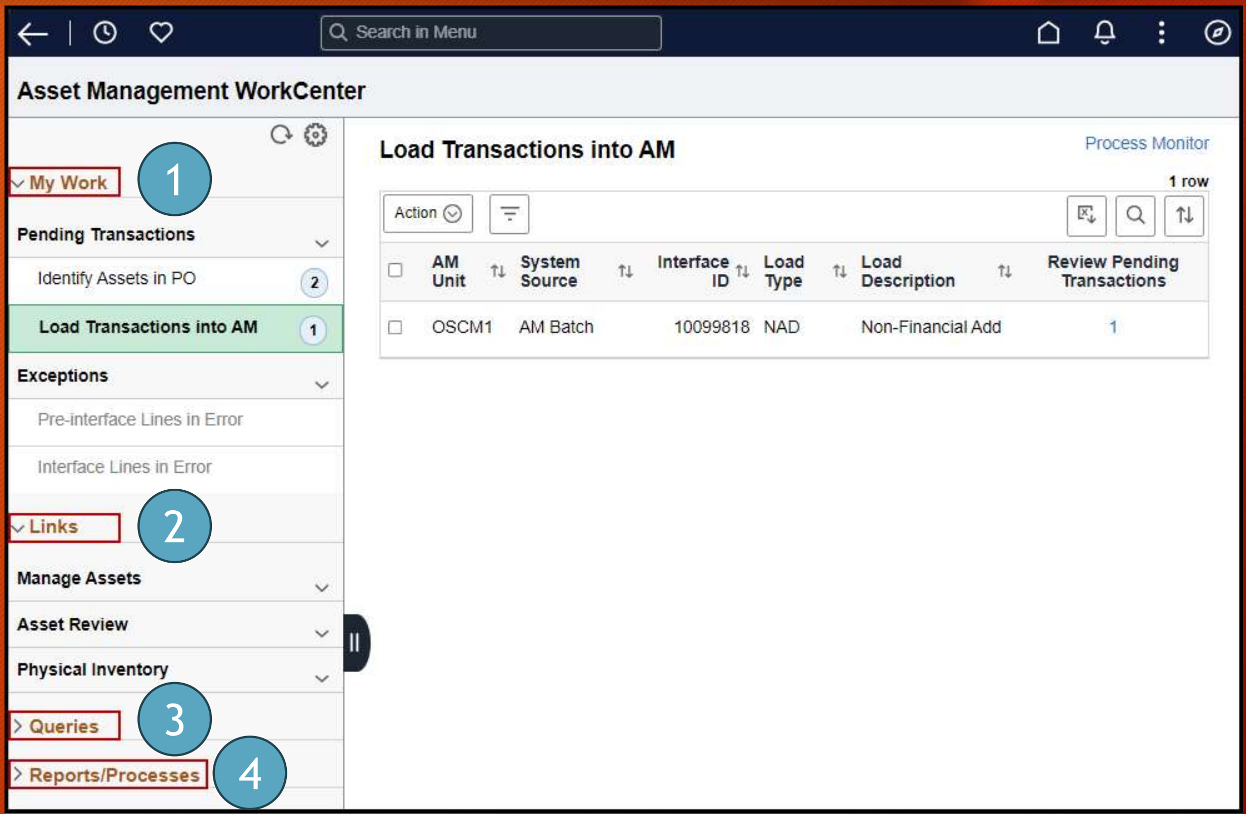
Comments and Attachments – Additional Access

- 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



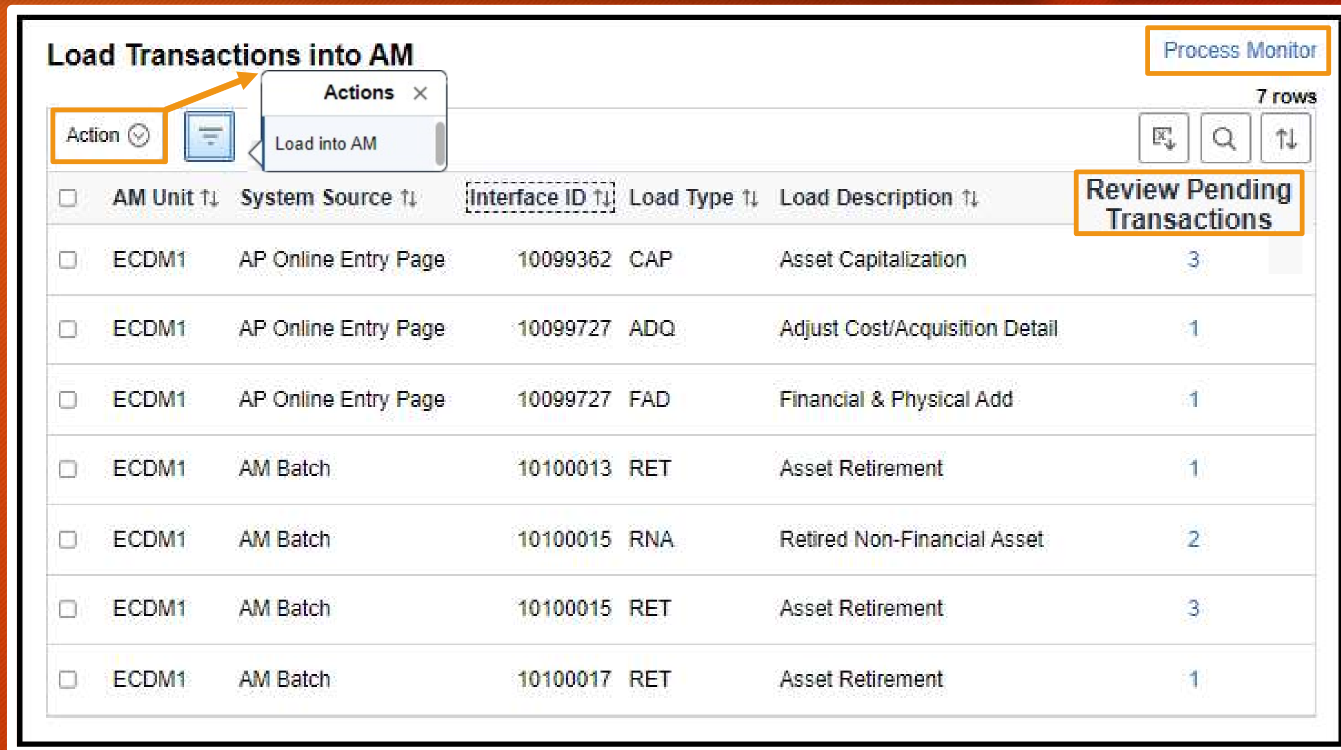
Fluid AM WorkCenter

- 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



Fluid AM WorkCenter

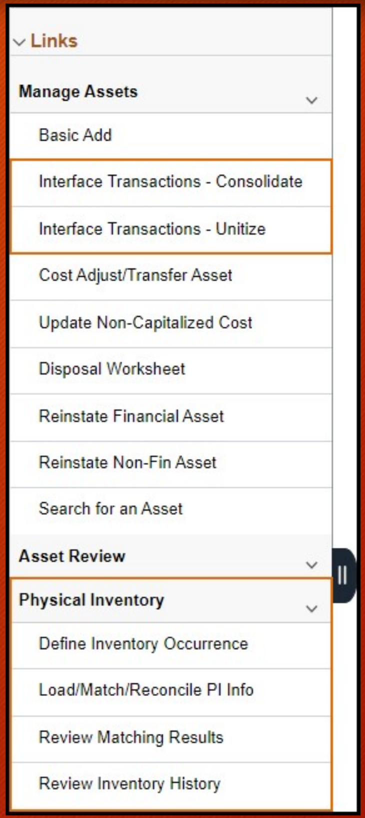
- Hyperlinks in Review Pending Transactions
- Action button
- Can only load one unique Interface ID at a time
- Can select individual lines of an Interface ID by Load Type
- *Recommended to load all lines of an Interface ID*
- Process Monitor Link



AM Unit	System Source	Interface ID	Load Type	Load Description	Review Pending Transactions
ECDM1	AP Online Entry Page	10099362	CAP	Asset Capitalization	3
ECDM1	AP Online Entry Page	10099727	ADQ	Adjust Cost/Acquisition Detail	1
ECDM1	AP Online Entry Page	10099727	FAD	Financial & Physical Add	1
ECDM1	AM Batch	10100013	RET	Asset Retirement	1
ECDM1	AM Batch	10100015	RNA	Retired Non-Financial Asset	2
ECDM1	AM Batch	10100015	RET	Asset Retirement	3
ECDM1	AM Batch	10100017	RET	Asset Retirement	1

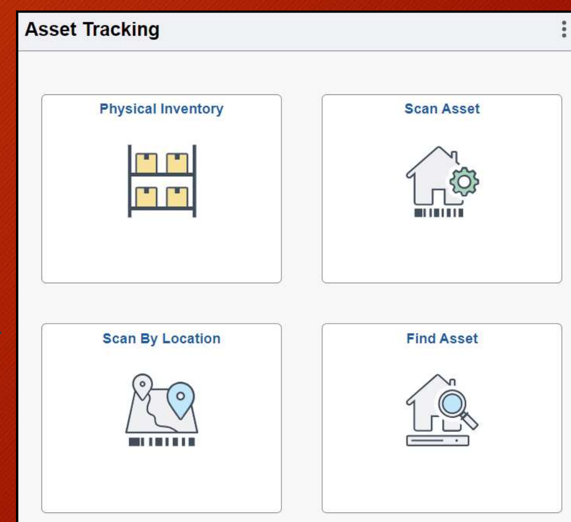
Fluid AM WorkCenter

- 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 > Reinstate



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
- CO-853 Adjustments to State-Owned Assets
  - Updated July 2024
  - Webinar coming in early 2025
  - Questions to 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

Questions...

EPM/STARS

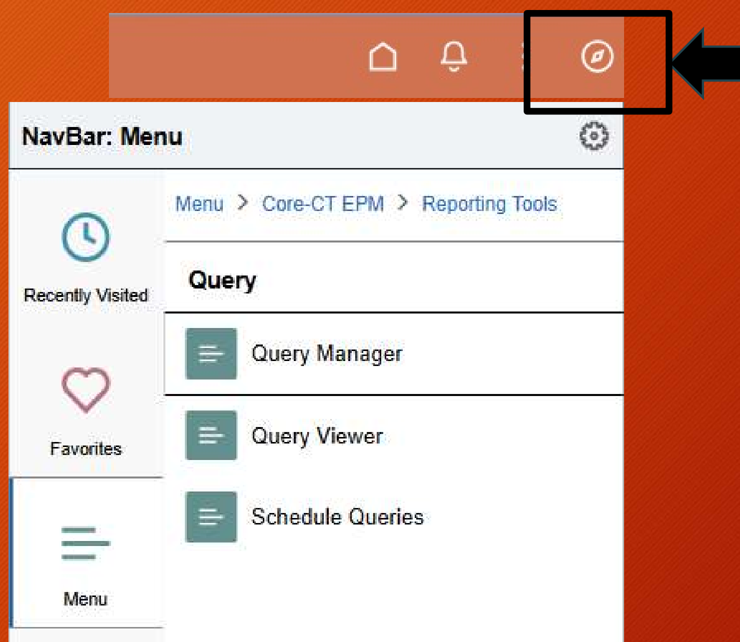
Wendy Monk

EPM/STARS Agenda

- EPM Navigation
- EPM PUM Favorites
- STARS Navigation

EPM Navigation

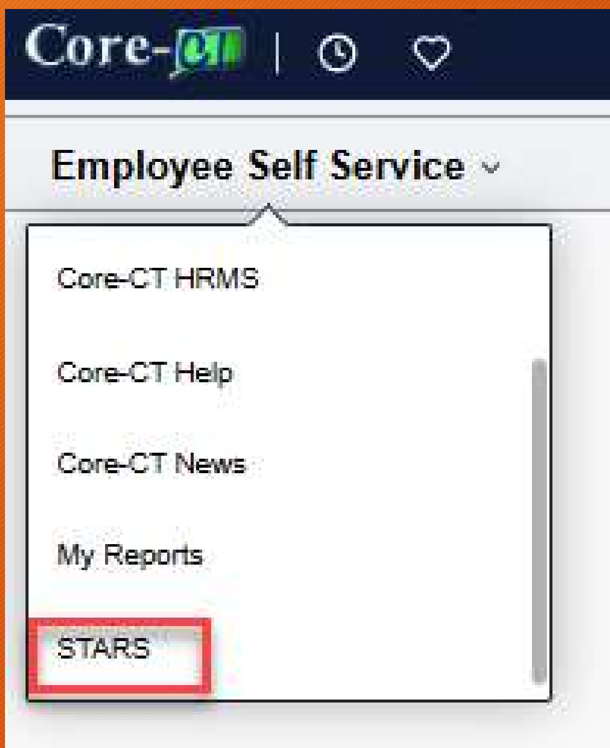
- Navigation: Main Menu > Core-CT EPM > Reporting Tools > Query



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 (anyone without a ct.gov email address)

Core-CT Website

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


ct.gov State of Connecticut   Governor Ned Lamont

Core-CT HRMS/FINANCIALS/REPORTING SYSTEM

Home | About Us | Help | Contact

LOGIN
SELF-SERVICE
HRMS
FINANCIALS
EPM
SECURITY
TRAINING
CORE-CT MAIL
CATALOG OF REPORTS
STARS

OFFICE of the STATE COMPTROLLER
DAS
REGISTER Online to VOTE
Regulations of CT State Agencies

Core-CT Modernization

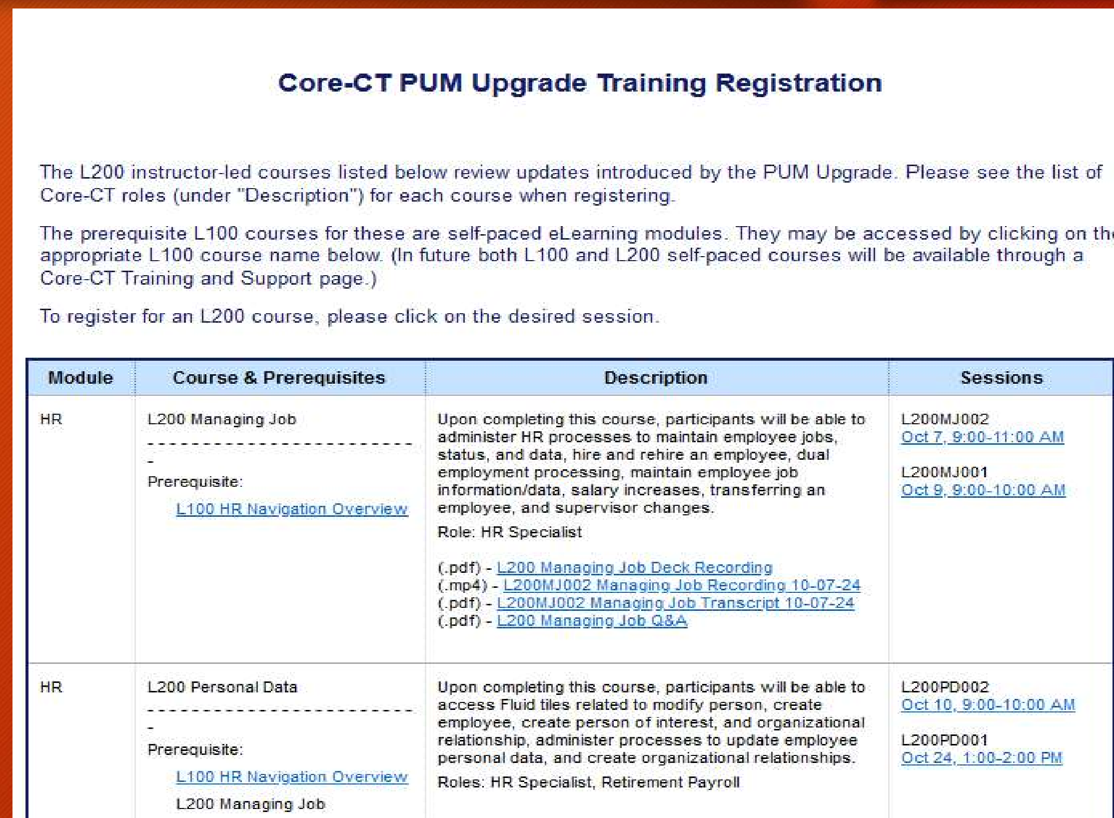
Useful Links

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) - Change Agent Meeting Slides Recording (mp4) – 10/03 Change Agent Meeting Recording Transcript (pdf) - Change Agent Meeting Transcript
August 27, 2024	Slides (pdf) - 8/27 Change Agent Meeting Slides Recording (mp4) - 8/27 Change Agent Meeting Recording
August 15, 2024	Slides (pdf) - UAT HCM Kickoff 2024 Recording (mp4) - UAT HRMS Kickoff 2024 Recording Q&A (.xlsx) - UAT HCM Kickoff 2025 Q&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: L100 HR Navigation Overview	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) - L200 Managing Job Deck Recording (.mp4) - L200MJ002 Managing Job Recording 10-07-24 (.pdf) - L200MJ002 Managing Job Transcript 10-07-24 (.pdf) - L200 Managing Job Q&A	L200MJ002 Oct 7, 9:00-11:00 AM L200MJ001 Oct 9, 9:00-10:00 AM
HR	L200 Personal Data ------------------------- Prerequisite: L100 HR Navigation Overview L200 Managing Job	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 Oct 10, 9:00-10:00 AM L200PD001 Oct 24, 1:00-2:00 PM

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.

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

HCM

Click on a module to access support materials.

Cross Module	Kronos
Benefits	Payroll
Human Resources	Time and Labor

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

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.