FIN PUM Delta User Group Webinar (ePro,PO,Pcard,AP,AM)-20241119_131126-Meeting Recording 1

0:08
Good afternoon and welcome to the Core CT Pump Upgrade user group meeting.

0:16
This meeting is for users of E procurement, purchasing P card, accounts payable and asset management.

0:28
I wanted to welcome you.

0:30
I want to thank you for coming out and taking the time to join us.

0:35
My name is Donna Braga, I'm the ERP business team lead for Core CT.

0:41
We have a full agenda for you today.

0:44
We've scheduled about two hours with time built in for questions.

0:48
They'll be each presenter will have a short time for questions at the end of their section and then they'll also be questions at the end.

0:58
We will be taking about a 5 or 10 minute break about halfway through and Q&A is enabled for questions.

1:08
So I will show you that in a second.

1:11
But just let me remind you too that the slide deck, the recording and the transcript and FAQs will be posted to the modernization page for this meeting.

1:20
So yes, it will be posted.

1:23
Please be patient.

1:25
It does take us some time to get the recording up there.

1:28
It's a large file and we need to have it posted to a bit server so we can't just post it up there as easily or quickly as we'd like to, but we will get the meeting posted up there.

1:41
That being said, for those of you, again, I thank you for coming and I will really thank you if you have any colleagues that use Core who weren't able to come to this user group meeting or any of the others to share this information with them and to remind them to come to the modernization page for the recordings and the trainings and so forth and share this information.

2:05
OK, All right, next slide.

2:10
So again, we mentioned the Q&A function.

2:14
If you look at the ribbon on the top of your team's window, you should see Q&A in the ribbon.

2:19
If you're in the web browser version.

2:22
And I apologize, I didn't turn my camera on.

2:24
If you're in the web browser version, you might not see that in the ribbon.

2:29
But if you do leave the meeting, make sure you leave, you use the red leave button and then come back in, in the app.

2:37
Because if you don't use the leave button, it could show up that you're here more than three times and you won't get back in.

2:43
The other thing that's very important here is if you if you need a closed captioning, that's something that you have to turn on your own for your own version of Teams.

2:52
If you use the three buttons, the...

2:55
above the word more, and you select settings and accessibility, then you'll have the option to turn on closed captioning for this meeting.

3:11
OK, next slide.

3:15
So you know we're here to guide you down this path for the long-awaited Core CT pump upgrade.

3:21
I know you've been hearing about it or hopefully you've been hearing about it for a while.

3:25
This is an opportunity for you to get back into Core to supplement your training documentation.

3:32
So again, going back to that website where we have job aids and e-learning videos and infographics.

3:42
Infographics are one page Cheat Sheets.

3:45
We have updated job aids, we have e-learning videos, we have materials and recordings from the instructor LED training.

3:54
Make sure you check on cross module because that will show you things that apply to everyone like basic navigation.

4:04
And you can use this documentation to supplement your training back at your agency, whether you're training staff that are moving from one responsibility to other or new staff also updating your documentation.

4:17
Hopefully you do have some business process documentation.

4:21
And if you don't, this is a great time to start that right?

4:26
I know that we've been reaching out through CORE.

4:29
One of the ways that we've been reaching out is change agents have been assigned from every agency and these change agents have been sort of liaisons between CORE and your agency, disseminating information about this upgrade.

4:43
And if you do hear from them and they're looking for information, please do respond to their requests because we've asked them to assess the readiness of your agency.

4:53
So it would be great if you can respond to them.

4:57
So again, you know we talked about the modernization page and the website.

5:02
Shanna will be showing you more on that later as well as the training page.

5:06
But if there's one thing that I really want you to take away as a major take away from this meeting that with the exception of asset management approvals, there really is no business process change, OK?

5:19
This upgrade and core is a very different look and feel.

5:23
It's been a long time.

5:24
It's time for us to get the software up to date to be used with different devices.

5:32
So the look in the feel is going to start to look a little bit more modern with a tile look and a feel.

5:38
So the clicks that you might use to get to that page but will be different.

5:41
But the business process is going to be the same.

5:44
So how did I do this last week, who approved for me last week, what were my rules for approvals, etcetera?

5:51
All that stuff is still in place.

5:53
OK.

5:55
With that being said, next slide, we have a very full agenda navigation.

6:05
Brienne McKenna is going to take you through navigation and approvals and then we're going to have, I'm sorry, let me go back to the slide.

6:14
Brianne's going to take you through navigation and approvals.

6:16
Maddie Bello person is going to go over E pro and requisitions.

6:21
Michelle Richmond is going to talk about purchasing.

6:24
Brian Gilmartin will go over changes or information for P card and supply chain management and budget workbook, supplier contract management, sorry and budget workbook.

6:37
Michael Verone's going to talk about accounts payable, Scott Pergaki is going to go over asset management and Wendy Monk is going to go over EPM and Stars.

6:48
Dustin Garino will talk to you about security and Shannon will wrap it up with the help desk and some reminders.

6:55
And then Brianne will be running another Q&A section at the end as well.

7:00
So again, thank you very much for your time.

7:04
I did see one question before I that was in the chat and it was will core be down tomorrow?

7:12
No core CT will be.

7:15
The system will be locked down Thursday at noon until the following Monday.

7:21
OK.

7:21
So Thursday the 21st at noon until Monday the 25th.

7:27
OK and the system will not be available.

7:33
Do I have any other questions that I can take before then?

7:36
I don't think so.

7:38
I think that's it.

7:39
So with that, I'll turn it over to Brianne.

7:43
Hey, thank you, Donna.

7:45
My name is Brianne McKenna and I am the core CT financials team lead.

7:49
And today I'm going to be sharing with you what's the new look and feel of the navigation and also approvals.

7:57
So in this on this agenda, we are going to take a look at what the home pages mean to you, new tiles, the NAV bar menu, how to continue to alphabetize the menu and then the new feature called collections.

8:15
Hey, when you log in the first time, this is what you will see.

8:17
You will be directed to what we call the employee self-service homepage.

8:23
And from the employee self-service homepage, there's a drop down on the left hand side.

8:29
In this example, we're going to select the arrow on the home page drop down and we're going to navigate to Core CT financials.

8:37
Other pages, other home pages include Core CT help, My reports and HRMS.

8:51
So here Core CT financials was selected.

8:54
Now in this example, we're going to use purchasing.

8:58
Clicking on the purchasing tile will direct you to the purchasing homepage made-up, made-up of more security related tiles.

9:04
So when you log in here and you select Core CT Financials, this will give you a list of all of the modules that you currently have security access to.

9:13
OK Tiles.

9:16
We are calling tiles high action boxes located on the homepage based on your roles, so you will not see tiles for all of your business process related needs, only for frequent processes.

9:30
You will continue to use the main menu, now called NAV Bar for other functionality.

9:41
Now here's the NAV Bar menu.

9:43
On the top right you will see a circle with an arrow in it.

9:47
This is the new and improved NAV bar that replaces the previous navigation drop down main menu which today you login is on the left hand side of the screen.

9:59
When you select the NAV bar you can drill into modules like you normally have.

10:03
Also the brake homes are now located inside the menu navigation.

10:08
We will see this in a later slide.

10:17
So I know in the past users like the option to alphabetize their menu, especially those of you who work in accounts payable.

10:26
So this is still an option.

10:29
All you're going to have to do is click the settings wheel located inside the NAV bar and select Alphabetical and click Save the NAV Bar Bread crumbs.

10:44
As mentioned in the previous slide, the bread crumbs slash menu navigation is now located at the top of the NAV bar.

10:51
Today you see them across the top of the page, but now they're housed in the new navigation menu bar.

10:58
You can still use them like links, all you have to do is click the link and drill into the local pages.

11:08
Collections Navigation Collections is a new functionality of high action processes for your module.

11:15
It will help your daily tasks run smoother because you are in a one stop shop.

11:21
Although it has not been delivered to all modules, we anticipate rolling it out in the future.

11:26
For those of you, for those of you who will not see it in this upgrade, the functionality is very similar to work centers and it will most likely be based on personal preference which you decide to use, work centers or navigation collections.

11:45
OK, I'm going to take a brief pause right there.

11:48
So that is an overview of the navigation piece.

11:52
If there are any questions, I'm happy to answer them.

11:55
Before we move on to approvals.

12:00
There is one question, how to make the tiles bigger.

12:05
So the way to make, so the way to make when you log in, it's going to be browser specific.

12:10
So you can use if you go to whatever browser you're in, you can maximize it there over 100% or whatever fits your need.

12:26
No more questions.

12:28
No more questions.

12:29
No.

12:30
Oh, wait.

12:30
Oh, OK.

12:39
There's one more will current favorites be saved or will we have to relink them?

12:46
You will have so we will discuss that later on in this user group.

12:49
But yes, you will have to take, we are recommending you take a screenshot of what your current favorites look like today and then you will have to re add them when the system comes up on Monday.

13:03
No more questions.

13:05
And if you have your hand up, you have to type in the chat to be able to get any questions over to us.

13:16
Glory, you have a question.

13:23
OK, I'll move, I'll move on to approvals and then you can type your question in the chat and we'll get back to it.

13:30
OK, this is the long-awaited approval section.

13:33
OK, so we're going to discuss the new fluid approvals, the notification bell, notification settings and notification actions and alerts.

13:44
This is where most of you are going to see the biggest changes for this upgrade.

13:53
OK, again, we go to the homepage, this in this example, we're going to go to core CT financials, which is on the homepage of purchasing, purchasing.

14:04
We'll click on the purchasing tile and then when you go on to the purchasing tile, it will then show the approval tile and this clicking on the approval tile will bring you to the append the pending approvals page.

14:21
The new pending approvals page will capture all approval related documents waiting for your approval.

14:28
You click on each row individually and drill into the document to approve.

14:34
The biggest change that you will see here is this.

14:37
This pending approvals page replaces the work list.

14:44
OK.

14:48
What it will do is it's going to capture all of the approvals you may have in this one interface.

14:53
Depending on your roles, it is possible to see E pro transactions, purchasing transactions, among other transactions.

15:01
In order to help filter these transaction, there is a filter box option at the top of the page.

15:07
Here you can sort by requester, date of the transaction, etcetera.

15:13
In the example on the left hand side of the pending approval page, it separates documents by type or module.

15:22
You have the option to use date routed from Priority, Requester and Type.

15:32
A great tip for this page is to use the Control F feature and search on the specific item number and the results will highlight in orange if some people.

15:43
If you have a long list of approvals and need the specifics say voucher ID or purchasing POID using the Control F, you can just type it in the box and it will highlight in orange for you to see.

16:02
Once the transaction is selected, you have five options depending on your module.

16:07
Approve, Deny, Push Back, Hold, and Request information.

16:14
Once the approve button is clicked, you have the option to add comments like you do today and any other action besides approval.

16:23
The comments will be mandatory deny, push back, hold, or request information.

16:29
You always have to include comments.

16:31
Each module will discuss further in their individual section the notification bell.

16:44
The new notification bell can also be used can be used to organize approvals.

16:50
This is located at the top right hand side of the page.

16:56
If you see right here, it's calling out the bell and there's a green dot next to it, which means you have new notifications to review.

17:03
When you click the bell, a list of actions or alerts will appear.

17:08
Clicking on either of these will take you to the document approval page.

17:20
So when you log in for the first time and you click the notification bell, you may not see the full verbiage of what the notification is.

17:30
We recommend that when you log in the first time that you configure your notifications to show the full notifications.

17:40
This is a one time setup.

17:42
All you have to do is what you'll do is you'll go to the notification bell, you'll hit the three dot.

17:49
on the top right hand side and what you'll do is you'll just display full notification text.

17:56
You'll toggle it over to yes, OK, and this will help you determine.

18:01
So instead of it just saying, for instance here requisition dot is they're notifying you of requisition.

18:08
It's going to tell you a little more detail and I recommend that all of you do this, especially the approvers, the actions and alerts.

18:22
Depending on the module and the transaction type, a notification action or alert will be created.

18:27
Clicking on either will take the user to a specific transaction document page.

18:32
The key difference is that after the user processes the transaction, a notification action will be cleared from the list.

18:41
Alerts are maintained by you, the user, so to remove them from the list you have to click X.

18:48
Each module will discuss this in more depth as we move on.

18:56
OK, we just went over the most global navigation and approval changes for the pump upgrade.

19:02
Are there any questions I can answer before we move on?

19:07
Lori, I know you still have your hand up.

19:09
Were you able to was she able to get something in the chat?

19:20
All she said was I am to make the tile bigger now.

19:25
OK, so you right.

19:27
All you'll have to do is use your browser settings.

19:29
Just like you want to make the font bigger, the tiles will get bigger with that by upping it to more than 100%.

19:36
You'll be able to do that once go live hits.

19:38
Not right now.

19:40
Correct When you get the tiles.

19:41
Yep there is AP card approval question should do you want to answer it now or just wait till P card?

19:56
What's the question?

19:57
I we can wait till we haven't covered P card yet but go ahead.

20:01
Ryan's here.

20:02
Sure, for P card approval the page will be similar because I approve multiple lines.

20:12
Hey, I can take that, Brienne.

20:14
Yep, I was waiting.

20:17
Yeah, P card approvals are not changing.

20:19
They will still be on the reconciliation page.

20:22
You won't be using the approval tile at all for that.

20:25
So that same business as usual for P card approvals.

20:31
Thanks.

20:31
Brian, there's another question.

20:34
Once you hit the X will it clear from your alerts and move the approval process on?

20:41
No one alert?

20:42
No it it's not going to.

20:43
Do you mean on the pending approvals page?

20:46
Once you clear the X it just takes it out of the notification bell.

20:50
It's not going to progress it unless you do take an action on it.

20:55
Like if you accidentally click X and you don't approve it, it's still going to need approval.

21:03
There's another question.

21:05
Will we still be able to filter notifications requisitions by high importance?

21:14
Yes.

21:15
There you go.

21:17
I couldn't remember.

21:18
I was trying to think of the page.

21:25
I believe it's part it's there is a filter option for that the priority.

21:35
Any other questions?

21:37
There's one more.

21:39
Will E pros not in completed status roll over or will you have to recreate those requests?

21:46
So that I'm going to actually that's a great question and I know it was brought up earlier this morning.

21:52
I'm going to hand this off to Maddie Bello person and she will be able to do a deep dive for you there.

22:02
Absolutely.

22:04
And that's it.

22:06
I'm well, I'm next in the in the presentation.

22:10
So I guess I can start the E pro section then.

22:15
Yes, please.

22:16
Thank you.

22:17
OK, sure.

22:19
Right.

22:19
So good afternoon everyone.

22:22
My name is Maty Bella-Persson.

22:24
I have been with the state for 24 years, half of those here at Core City and the last two as the module lead for the April module.

22:35

Today I will be going over the changes in April, which with the new fluid user interface in the upcoming upgrade.

22:43
As a reminder, enter your questions in the Q&A section and we will address them at the end of each module's presentation.

22:50
And the question that can't remember who asked but remind me at the end of of the April, I will ask this.

23:00
I will.

23:01
Yeah, I will answer that.

23:05
Thank you.

23:07
The EPO topics we will cover today which address the most evident changes in the module are E procurement, Fluid user interface, create requisition, Requisition defaults, catalog, search, manage requisitions, manage requisitions, edit requisition, mass change action, persistent cart and punch out.

23:37
I'm sorry.

23:41
So the E procurement module has moved from the classic look to a fluid user interface which still which is style based like you see on a tablet or a cell phone.

23:54
Oracle is no longer supporting the classic version of E Procurement, therefore the state moved to the fluid user interface.

24:03
When you hear the term fluid, think of the ability of a page to adapt to the different screen sizes on mobile devices.

24:12
That said, it is important to keep in mind that Core CT will only support time entry and approvals on mobile devices.

24:20
All other functions should be performed on a desktop or laptop.

24:26
Navigation to E Procurement starts with clicking the Core City Financials option on your homepage navigation.

24:34
This will display tiles to all the financials modules your security allows.

24:40
Clicking the E Procurement tile will open options within the module also based on security PA Requisition.

24:53
To create a requisition, select Core City Financials from your home menu, click the E Procurement tile and then the Create Requisition tile.

25:09
The Create Requisition tile will open on the Requisition Defaults page, previously known as the Fine requisition.

25:19
The Override default section that was under the header default has been eliminated from this page and the functionality moved over to the mass change action and we will cover that shortly.

25:35
The regular distribution chart fields are now divided into 3 tabs to accommodate user mobility and small screens.

25:43
The option to show all chart fields on the same page is still available by clicking that icon.

25:50
The Details tabs and the Assets Information tabs on the Distribution section continue to be assigned to Inventory in Assets, respectively.

26:09
When you're adding items to the cart, if you happen to return to the rec Defaults page to view information on that page to get back to your lines to the lines in your cart, click Cancel or anywhere outside of the page of the red default page to return to your cart.

26:31
Clicking Done will lead you to a page where you must click the cart icon to get back to your requisition lines.

26:39
It gets It's a little tricky, but you'll get the hang of it as you start using it.

26:46
And if you get stuck for whatever reason, you can always contact the Help desk Catalog search.

26:53
When searching the catalog by item ID, make sure the search operand is equal and not contains any.

27:01
We're working on setting the operand to default as equal, but in the meantime the workaround if you use contain any is to enter the last set of digits for the CM number in between% wild cards, not*%, and that that would only be the last set of digits on the CM number.

27:25
The Search by contract ID section was removed by Oracle and we are working diligently internally on having it added again.

27:40
Manager positions.

27:42
OK, then here's the navigation to the Managed Acquisition style.

27:47
Select for City Financials from the homepage menu, then click the E Procurement tile, and finally the Manage Requisitions tile.

27:58
Clicking the Manage Requisitions tile will open the My Requisitions page, which displays the last seven days worth of requisitions for the user performing the inquiry in all statuses but complete.

28:14
To adjust these results, use the filters to expand or narrow your search criteria accordingly.

28:22
To edit a requisition, choose Edit from the actions, which are now on the left side of the page.

28:30
This will warn you that doing this may restart workflow.

28:33
Click OK to continue once the rec, Once under rec, there is one more step you need to do in order to have the ability to edit the rec and that is to click the checkout, click checkout button and that will take you to the checkout page.

28:53
Yeah.

28:53
So clicking the checkout button will open up the Edit Requisition page where you can access all of the requisition sections to review and edit.

29:04
Read defaults, header lines, Schedule distribution.

29:08
You should be able to edit any other sections from the checkout or see them all and access them from the Checkout Mass change action.

29:22
The Mass change feature is now located on the checkout page.

29:27
You can select the lines you want to change or use this All Select all button if that's the intent then you select Mass Change from actions.

29:41
This will open the mass change page and to see the current values you click the Load values from defaults button.

29:51
You will then replace the existing values with the ones you're changing to and click Done You will see the message regarding applying changes to select the lines not sourced appeal and you would hit yes it that's the intent.

30:10
OK, OK, the persistent cart.

30:17
This is a new feature design with you, the users in mind.

30:22
The cart stores items added in between sessions.

30:26
For example, if you're in the middle of creating a rack and you have a sudden shift in priorities or system outage system time out before you get a chance to save your requisition.

30:39
When you return to create a requisition, your items will be in the cart.

30:44
Think about those times when this happens, you have to switch priorities and you don't have a chance to save your rack or finish it and you have 5080 / 100 lines in your rack.

30:59
Having to re enter all those lines will be very time consuming and not efficient at all.

31:05
So the cart will store those lines for you if you don't have the chance to save your requisition.

31:19
I think my let me see.

31:26
I'm sorry.

31:30
All right.

31:31
So sometimes you will find that as you're working on your rack, the cart will display A0 next to the icon the little cart icon even after you've added items to it.

31:47
Always click the part when you get to the add item screen to ensure that either it is empty or it has the items that you need for the requisition you are currently creating.

32:00
It could be sometimes it happens that you didn't finish your previous record, didn't save it and then you come back and you're starting to create a new one.

32:12
And when you click on that page and the cart has items from your previous session.

32:18
So you get in the habit of clicking the cart, reviewing the items that are in it, and you can either delete them or finish the requisition you were creating or whatever you need to do.

32:34
Here are some tips and recommendations to keep in mind when it comes to the persistent cart.

32:40
Like I said, get in the habit of clicking it before you start adding items to it.

32:45
Even if it shows 0.

32:48
If your items in your card, they will display and you can either continue with the rec for the existing

items, save the rec that needs that needs those items to complete it in the future, or simply delete them and start your new start ID items for your no requisition punch out.

33:13
If you don't see the web options on the left under catalogue, it means that there are items in the cart from a previous session that was not a punch out requisition.

33:27
So follow the tips on the previous slide to clear the cart or to yeah, to clear the card and I'm here.

33:41
Yes, if you clear the card, then the option will reappear.

33:46
The option to add items to web suppliers.

33:55
OK, so we went over the most noticeable E procurement changes in fluid apart from notifications which are similar to purchasing.

34:04
I will be covered next.

34:06
At this point are there any questions that can answer the E procurement items we have covered?

34:13
There are a few.

34:15
As a purchasing supervisor, is there a way for me to see my staff's pending requisitions?

34:20
Absolutely.

34:21
You go to management positions and you can adjust the filters so you can see the results that you desire.

34:31
OK, next question, will we still be able to filter notifications requisitions by high importance?

34:40
I believe that is the case.

34:42
As Brienne mentioned earlier, there is a filter on the left panel I believe that lets you a view by priority.

34:53
Next question, will E Pros not in completed status roll over or will we?

34:58
You have to recreate those requests as we tested in our UATU environment in dress rehearsal.

35:09
The approvals transferred to the new system or to the new environment as they were in the previous.

35:17
If you have any doubts, I would take a screenshot of your of your work list or download it to Excel because you can now and just take a look account the 25th and compare.

35:33
But as of now we do.

35:35
No, if you entered a requisition, it will be in the system.

35:38
We are not deleting any of the requisitions.

35:40
So they will all be there.

35:43
Yeah, they will all be there in there.

35:44
They may if they're in the process of approval.

35:48
It may not show up under the notifications icon, right?

35:51
If it's waiting for someone, right?

35:54
They can see, always see it on the approval page though.

35:56
It should show up in your approval page.

35:58
So you don't have to re enter any recs that you've entered.

36:02
Everything you've entered will be in the system.

36:04
Thank you.

36:04
Thank you for clarifying that.

36:06
And I I thought the question was, yeah, I think you're thinking differently.

36:11
Yeah.

36:12
The only thing we worry about is, is if the approval notification, if it was sent out before we took the system down then and we switch over to this notification bell, it might not have made it over to the notification bell.

36:26
I think that's the only thing that we worry about, right.

36:29
So when you go to your approval page, you'll see everything that needs approval, correct.

36:36
Thank you, Donna.

36:38
The next question, to save a requisition and come back to it later, do you still need to have all the coding entered to save the requisition?

36:48
If you if you do because you have we have two buttons, Save which is the original, save for later and submit which is the original save and submit.

37:05
I don't think you need the coding and it just to save it for later.

37:10
If you would just save it.

37:12
If you for to submit it, I believe you do or you do for submitting.

37:17
But to save it, you should be able to return to it and add your distributions.

37:25
OK, next question.

37:26
Will the screens you just showed be available in the job aids and core?

37:32
Yes they should be.

37:34
Most of all, all of the job aids for E procurement have been revamped to show the the new screenshots, the new look and feel, and everything else.

37:47
OK next question.

37:48
When we have multiple approvers in our office and when someone puts a requisition or change order on hold, is it still only visible by the person putting it on hold?

38:00
If he's just putting it on hold, it would own it would stay on their on their approvals page.

38:08
It will move to the bottom but it would drop from the other approvers I believe.

38:16
Yes, that's correct.

38:17
Yes.

38:18
And it also sent an alert to the requester letting them know that that it's on hold.

38:28
Are there any changes for special request requisitions?

38:33
For special request, no, no, the functionality remains the same.

38:38
OK, next one we will be able to automatically add the contract ID to all rec lines or this will have to be done manually?

38:49
No, that has a that was actually fixed in production a few months ago and you should be able to.

38:58
If you enter it on the first line and the following lines are blank and the contract ID, once you save it or submit it, the contract ID will copy onto the blinds that are blank as long as the purchasing authority remains this contract.

39:21
OK.

39:22
We can enter requisitions up to Thursday 1121 before noon, is that correct?

39:30
That is correct.

39:31
At noon the system shuts down on Thursday.

39:39
OK, let's see, is there a different process for PSA?

39:46
The process, the functionality stays the same.

39:49
The look and feel is a little different, like the screens that you saw, but the process is exactly the same.

39:59
OK, that's all we have for questions right now.

40:05
Thank you.

40:05
Well, oh, wait one second, there's no OK with the request information feature.

40:12
Can documents be uploaded?

40:14
Or we only get a text response with the oh the request information.

40:22
There will be comments that those are required where the approver can enter what it's what is being requested and the requester will get on action notification.

40:36
I believe to that effect in an alert or an action.

40:43
Can documents be uploaded to that?

40:47
I mean you can upload attachments as normally, but if you need anything.

40:54
Do you mean the requester?

40:55
Can the requester add attachments after it goes to them for information?

41:05
It looks like they're asking would the request information feature can documents be uploaded?

41:12
The request information feature is an approval action.

41:16
And the only thing that from that action is that you can enter comments and you have to actually those are not optional.

41:24
Those are required comments and you can ask what you need as far as information for punch out and core item Rex, are there still no need to enter category and account code?

41:39
That is correct.

41:40
That's still populated from the items that you put in the cart and RPOSRPOS be the same.

41:51
If they are not completed, they will not be deleted like a requisition.

41:56
That is correct, but I'll let Mitchell confirm that.

42:03
Yes, that's correct.

42:11
Any other questions?

42:16
See, I see a hand up so far.

42:29
That's all the questions for now.

42:31
We're going to actually take a 5 minute break.

42:34
Wait a minute, just we'll do slides be available after the training?

42:39
Yes, they will.

42:40
They'll be posted the first two monetization page.

42:43
We'll be talking about that later on in the presentation.

42:46
OK, we're going to take a small break and we're going to return at 2:00 PM.

42:53
Sounds good.

42:53
Thank you, everyone.

42:55
See you in a few.

44:44
For the couple of people that just joined, we're taking a break and we'll resume at 2:00 PM.

48:45
OK.

48:46
It's 2:00 and we have another question.

48:50
Maddie, are you on?

48:56
Yes, I am.

48:57
OK.

48:58
The question is in the current PSA and POS requisition approval workflow, there is no request information approval functionality.

49:07
Is this new functionality in core for approval?

49:11
If not, then will this action be available for PSA and POS approvals?

49:18
The Request for information option is available to all requisition types, including POS and PSA.

49:38
Perfect.

49:38
One other question that was answered already.

49:40
Can you convert a wreck to a contract?

49:43
And Maddie answered yes.

49:44
The functionality remains the same, yes.

49:50
So we're going to go ahead and move on.

49:54
Thank you.

49:54
And Michelle Richmond from purchasing will take over.

50:04
Good afternoon, everyone.

50:05
Welcome to the purchasing section.

50:07
My name is Michelle Richmond and I have been with the state for 19 years and with Core CT for three years as the purchasing team lead.

50:14
Today we will cover the newest changes along with a few tips in purchasing and procurement contract.

50:20
We will start off with a change that will surely be everyone's favorite budget checking, a purchase order.

50:25
Then we will move on to e-mail validations, the notification bell, purchase order approval in fluid and procurement contract.

50:38
Next slide please.

50:51
Sorry, one moment.

50:56
Budget Check is now available on the Purchase on the Purchase Order header.

51:01
Users are now able to go to the Purchase Order header and click on the icon to Budget check the purchase order.

51:07
This feature will only be available to individual purchase orders.

51:11
Agencies will not have access to Budget Check a batch of purchase orders.

51:16
An important thing to remember is the Budget Check runs through batch automatically at 10:12 to and overnight.

51:24
This new feature is in place in case you need to run the budget check in between these times, but it is not to replace the normal batch.

51:33
It is also important not to budget check during the normal batch times, but don't worry if you accidentally run it at the same time, the system will stop you.

51:49
E-mail validation has been added to purchase orders.

51:52
When a purchase order is created and a one time e-mail address is entered, the system will validate the e-mail address in the valid e-mail format.

52:03
This is located under the PO default section on the purchase order.

52:13
Fires Workflow will not use approval fluid approvals.

52:18
Instead the notification bell will be used.

52:21
The notification bell is used for alerts and actions for the user.

52:26
The buyer will receive an action notification if the approver is requesting more information or if the PO is put on hold.

52:35
The buyer will receive an alert notification when the PO is approved or denied purchasing approvers.

52:49
Approvals are now through Fluid Approval Tile.

52:53
Click on CT Financials, select the Approval tile, and then the Approval tiles.

53:00
Here you can select the purchase order to review for approval.

53:09
Approvers can also use the notification bell as an alternative way to approve a purchase order.

53:16
An approval request will be in your notification bell under the Action tab.

53:21
When you click on the purchase order within the notification bell, you will be brought directly to the Purchasing Approval page.

53:28
This is just another navigation.

53:36
Once a purchase order is selected, you have five options.

53:39
Approve, Deny, Push Back, Hold Request information.

53:46
Once the approval button is clicked, you have the option to add an approver comment, but it is not required.

53:52
When selecting Hold, Deny, Push Back request information, you are required to enter a comment.

54:06
When a purchase order is put on hold, the approver will now see the word HOLD in the pending approvals page, Purchase Order, Approval comments and statuses.

54:26
The approval page on the purchase order will no longer show previous approver comments or if the PO is on hold, the approver will be required to click on the approval chain at the bottom of the page to see any comments and the status of the pending purchase order.

54:49
Procurement contract PO default and OPM reporting link have moved to another location on the procurement contract.

54:58
These links still have the same function and other than the location there's no change.

55:09
This slide is not a change in the system, just a friendly reminder.

55:13
Creating a procurement contract and clicking Corporate contract.

55:17
This makes the contract available to all agencies.

55:21
Please keep in mind this should only be checked by DAS.

55:25
All other agencies should never check corporate contract.

55:32
Does anyone have any questions regarding purchasing or procurement contract pages?

55:40
There's a couple.

55:40
Yeah, go ahead.

55:41
Jim.

55:42
With regards to the budget check icon, will we be able to kick the PO to go through budget check outside of the hours mentioned 1012 to and overnight?

55:55
Did I understand that correctly?

55:57
My apologies if I am repeating what you said.

56:00
That's OK.

56:01
Yeah.

56:01

So right now we have the normal batch 10/12 to overnight, but there are times that you can't wait for that batch to happen and you have to push something through quicker.

56:13
So you will be able to now go on to that PO header page and up in the right hand corner you'll see the PO dispatch.

56:21
I'm sorry, they the budget check icon and you can click that and budget check yourself.

56:26
Some agencies actually come to us, put in help desk tickets to require that and they'll be able to do that themselves now.

56:34
OK, there's another question.

56:36
Will the PO issuer receive e-mail notification for hold, denied, push back on P OS?

56:44
Yes, they will.

56:45
They'll receive a notification action or alert, whichever the case is for the specific one, and they will also receive an e-mail notification.

56:57
OK, go ahead, Diana, with your questions.

57:00
Yeah, sure.

57:00
So there's one question.

57:01
Will the individual budget check run without all the approvals required?

57:08
No, thank you.

57:12
There's another question.

57:13
Will the function for printing, dispatching P OS remain the same?

57:19
Yes they will.

57:31
OK.

57:31
That looks like all the questions we have for now.

57:34
You got me thinking Now the budget check, if it's not approved, I believe you can click it and run it to make sure that it'll go through.

57:48
I believe you can.

57:51
Brian, have you tested that recheck pre budget check?

57:56
I don't, I don't know if we turned on pre budget check, but you need to have all the approvals like you do today in order for it to pat to truly pass budget check.

58:04
Right, right.

58:05
So you're not going to get it any further along without your approvals than you do today.

58:11
No, I, I knew that.

58:12
I just was wondering if, if, if they'll see if it would go through, you know, if you're just checking to make sure your budgets are good and everybody check.

58:21
Yeah, I'm going to say no, but I will double check that there's one more question.

58:29
Do we do we do budget check before updated APO, but before doing a change order, you would do your change order first and get it approved and then you could let it go through batch.

58:49
But if you need it sooner, you could budget check it in ahead of time.

58:55
Thanks, Michelle.

58:56
That's it for questions.

58:58
Thank you.

59:05
I'll now turn it over to Brian Gilmartin.

59:07
Thank you.

59:12
I'm Brian Gilmartin and I will be going over procurement card for the agenda.

59:21
I'll be talking about U.S.

59:22
bank reconciliation request, workflow notifications and P card transfers.

59:30
So if you have not heard, you will be switching to U.S.

59:33
bank and they will be the new provider for the state of Connecticut procurement cards.

59:38
The program will be using Visa instead of MasterCard and it's slated to start January 1st, 2025.

59:46
For reconciliation in core.

59:49
That process will stay the same.

59:52
The difference will be that there'll be a transition period will both banks will be in there for U.S.

59:59
bank and JP Morgan until we switch over.

1:00:06
P card requests for JP Morgan will continue in core for the duration of the contract.

1:00:11
Requests for U.S.

1:00:12
bank will be handled using their Access Online web platform.

1:00:18
More details will be coming from DAS and OSC about the change over for reconciliation.

1:00:28
When navigating to reconcile, the path name is changed to Reconcile P card statement as you see on the left side, and there is a new search option to look for to search for business units.

1:00:39
So if your agency uses more than one business unit, you'll be able to filter by that if needed.

1:00:48
Request workflow notifications for P card requests.

1:00:53
At least until the end of the contract.

1:00:55
The workflows will now be notifications.

1:00:58
They will no longer be in the worklist.

1:01:03
The notification actions will be there for approvals and notification alerts will be there for denials and acknowledgments.

1:01:11
For example, if there was a change order, the emails will work as they always have.

1:01:22
So a couple of tips for that.

1:01:23
So in process requests will not transition from the worklist to notifications.

1:01:29
So if you need to look at one that's out there, you can either navigate directly to the request or you can use the original e-mail hyperlink.

1:01:38
If you have any requests that are outstanding before we take the system down, try to review those and get them processed and make sure they are up to date.

1:01:51
P card transfers.

1:01:52
This only applies to agencies that use department cards and there's been an issue where a transferred card the transactions were unable to view for the previous custodian when it transferred from 1 custodian to another.

1:02:06
These can be corrected if needed, we just need you to put in a help desk ticket with both the original and the new custodian.

1:02:17
Are there any questions on the P card?

1:02:24
It doesn't look like we have anything at this time.

1:02:29
All right, we'll move on.

1:02:31
Still.

1:02:31
Brian Gilmarin, I'll be going over supplier contract management and budget workbook.

1:02:38
It'll be the notifications and workflow notifications very similar to Picard.

1:02:45
So supplier contract, internal collaboration, and the budget workbook will use notification alerts only.

1:02:52
There'll be no actions.

1:02:55
Suppliers and providers, those that login externally are still going to have the traditional work list that we have today.

1:03:02
They will not have these notifications.

1:03:05
So just know that if you're dealing with your providers, the emails continue as normal as they always have.

1:03:12
One thing to reminder on that is, again with alerts, those will not drop off unless you click the X on them.

1:03:20
They'll stay on your list.

1:03:25
And again, just like P card in process, workflow will not transition from the old work list into a notification, but you can still access it by either direct navigating directly to the document or to the workbook, or by using the e-mail hyperlink that you got from the original e-mail.

1:03:45
Again, anything in process, whatever you can get completed ahead of time, we'll just clear that work list up before you.

1:03:57
And are there any questions on that?

1:04:04
There are no questions.

1:04:09
All right.

1:04:09
Well, thank you very much.

1:04:10
I will turn it over to Accounts Payable and Mike Barone.

1:04:14
Thank you, Brian.

1:04:16
Good afternoon.

1:04:17
My name is Michael Verone and I am the ERP Financials Business team lead for the Accounts Payable module.

1:04:23
For the Accounts Payable module, we will be reviewing the following items submitting vouchers for approval, both non PO and PO vouchers notifications form navigation and the accounts payable work center.

1:04:39
Submitting vouchers for approval in core CT Accounts Payable features a new batch process to submit vouchers for approval.

1:04:47
This process will run after the daily voucher matching job on the daily batch schedule at 8:00 AM, ten AM, 12:00 PM, 2:00 PM, and overnight.

1:04:58
Voucher processors are the submitter and they will either submit the voucher for approval or wait for the batch job to submit the voucher for approval.

1:05:07
All vouchers must be submitted before being sent to the approval tile.

1:05:12
It is important to note that the voucher approvers no longer can submit vouchers for approval.

1:05:18
To assist with monitoring vouchers, the AP Workcenter will have reports for monitoring vouchers that have not been submitted for approval.

1:05:28
Submitting Non PO Vouchers When a non PO voucher is saved, the submit approval button appears.

1:05:35
The voucher processor can click the submit approval button.

1:05:38
If they do not click the submit approval button, then the approval submit job will submit the voucher for the approver once it runs during the daily batch schedule.

1:05:50

Submitting PO Vouchers when APO voucher is created and saved, the submit button does not appear until the voucher is matched.

1:05:59
Once the voucher has been matched, the Submit Approval button will appear.

1:06:03
The voucher processor can click the button or wait for the batch process to run again.

1:06:09
The Submit approval job will run during the daily batch schedule after the voucher matching job at 8:00 AM, ten AM, 12 PM, 2:00 PM, and overnight Next slide notifications.

1:06:24
Notifications will appear in the notification bell for voucher approvals.

1:06:29
The voucher will show up under actions and will state that a voucher is awaiting your approval.

1:06:34
Additionally, a voucher submitted for approval either by the Voucher processor or by the Batch approval job, will also appear in the Approvals tile.

1:06:48
For navigation, many high action items are accessible in multiple ways, either by the AP Tiles, the AP Navigation Collection, or the NAV Bar menu.

1:06:58
The AP Tiles and AP Navigation Collection do not contain all the items in the NAV Bar menu for the module.

1:07:06
One example of an item that is only accessible via the NAV Bar menu are the AP Forms.

1:07:11
To navigate to those forms, go to the NAV Bar menu.

1:07:14
Core CT Financials.

1:07:16
Accounts Payable Review Accounts Payable Info The Accounts Payable Work Center users have access to the Accounts Payable Work Center that compiles all the links and page loads necessary to carry out transactions, but with less navigation.

1:07:36
Additionally, on the Accounts Payable Work Center, there is a new query to identify vouchers that

have not been submitted to track vouchers that were saved but have not been routed to the approver's tile.

1:07:48
The voucher not submitted query is located in the voucher approval section on the Accounts Payable Work Center.

1:07:55
The query will assist with identifying vouchers that have not been submitted for approval questions.

1:08:07
So far, there are no questions in that case.

1:08:10
Next up is Scott Pradaki with Asset Management.

1:08:14
Thank you.

1:08:16
Thank you, Michael.

1:08:17
Hello, everyone.

1:08:18
My name is Scott Perdaki.

1:08:19
I am the Asset Management team lead and I'll also be your guide through asset management changes.

1:08:29
We're going to talk about our new approval process, additional access to asset comments and attachments, the new look of the Fluid AM work Center and navigation to asset tracking.

1:08:39
We want to point this out specifically for our mobile device users.

1:08:43
We also have some information to share from asset policy.

1:08:50
We'll start with approvals.

1:08:52

Two types of transactions will now root for approval disposals, otherwise known as retirements and inter unit transfers.

1:09:00
These have always been done by financial asset processors and little is changing in the transacting process.

1:09:06
Requests will now just root for approval before processing.

1:09:10
There's only one level of approval and they stay solely in your agency.

1:09:14
It doesn't go any higher than that.

1:09:16
You can also choose to have more than one approver, and this is completely at your agency's discretion.

1:09:22
Which leads us to the new role Asset approver, which only has one current conflict and it's with the financial asset processor role.

1:09:31
You can't be both a requester and an approver.

1:09:35
Financial security liaisons must assign this role to an eligible employee the day we go live, and financial asset processors should wait until the day after that to transact.

1:09:47
Transactions submitted before the day after an approver is assigned will get stuck as approval requests do not get retroactively assigned.

1:09:56
It's very important to have your asset approver identified now.

1:10:03
So the big question why are asset approvals being implemented?

1:10:13
A security concern was identified with individuals removing assets from their agency's repository unchecked.

1:10:21

Security and asset management considered several corrective options, one of which was approval workflow as used by the other supply chain modules.

1:10:29
Ultimately, it provided the necessary checks and balances while also being the least intrusive.

1:10:35
So Core CT has also implemented it to the asset module.

1:10:43
So what does this mean for our agency asset teams, asset approvers?

1:10:48
Of course, we'll have to have the new duty to review and approve requests.

1:10:53
You'll either be slightly expanding your team by assigning the role to someone else in your agency, such as a manager, or you'll keep your asset team the same size by simply assigning it to anyone within the team other than your financial asset processor.

1:11:08
Not to be confused with your asset processor.

1:11:10
Your asset processors are eligible to become approvers, as are your physical inventory processors and physical inventory scanners.

1:11:19
Asset processors will see more retirement interfaces, but reviewing and loading interfaces is already their typical daily duty, so there's really little impact.

1:11:34
Financial asset processor changes, disposals and inter unit transfers will now process once approved.

1:11:41
Disposal Authorization will be entered as a new asset comment when transacting.

1:11:46
Only the Disposal Worksheet page will be used for retiring assets going forward.

1:11:52
Access to the Single Asset Retirement pages has been changed and they have been renamed to Just Reinstate.

1:11:59
They will still be used for that purpose.

1:12:01
You will not be losing access to old retirement information or old reference codes as that will remain available on those pages.

1:12:10
There's virtually little change to how the Financial asset processor use uses the Disposal Worksheet and cost adjust asset pages.

1:12:20
Don't forget that a large benefit to using the Disposal Worksheet is that you can dispose multiple assets at once.

1:12:26
You are not limited to doing one at a time.

1:12:34
A few additional approval tips for everyone on the asset teams.

1:12:38
Assets cannot be transacted on.

1:12:40
Further, while pending approval, You shouldn't want to transact on assets you've already said were disposed or transferred, and the system assists by blocking the ability to do so.

1:12:50
The Approval Pending indicator will appear on the Assets Review Cost page.

1:12:55
This field is hidden if the asset isn't pending approval.

1:12:58
You can also search for all pending approval assets on the Search for an Asset page by using the Approval Pending toggle.

1:13:06
The whole asset approval process is expanded on in detail in the Asset Management Approvals L200 class.

1:13:13
Refer to the recordings For more information, including how notifications and emails work in AM as they do ACT slightly differently for assets.

1:13:27
Moving on from approvals, we have additional access to comments and attachments.

1:13:32
These were previously only available on the basic ad pages.

1:13:36
The example image shown is of the review cost page and you can see a few other pages where they've been added, namely cost adjust, transfer and dispose and the disposal worksheet.

1:13:48
This is convenient for our financial asset processors to enter that disposal authorization as they transact.

1:14:00
The new look of the Fluid AM Work Center functionality is still similar to Classic, but you can see the New look tabs are gone and you now have all sections listed on the left menu.

1:14:12
All menu items and the menu itself can be expanded or contracted.

1:14:17
The related content drop down is no longer available and fluid, but you can quickly navigate to other menu pages while the system automatically pulls the acids you were already working on for you up.

1:14:36
There is also a new look for loading transactions into AM.

1:14:39
It's been tightened up a bit to provide necessary transactional detail in a more succinct way.

1:14:45
Namely, the Action column previously used to review lines has been replaced.

1:14:51
Instead, we have the Review Pending Transactions column on the right which has 2 purposes.

1:14:56
It shows the count of interface lines and acts as a hyperlink to review.

1:15:02
You can see the numbers colored in blue in the image indicating that they link the action button.

1:15:08
This replaces the button below the transaction table that ACID processors used to load lines.

1:15:14
It can only be seen by the asset processors.

1:15:18
You can now only select one interface ID to load at a time.

1:15:23
This prevents compounding errors and messages will pop up to assist asset processors as they take action.

1:15:31
Interface IDs with multiple lines no longer toggle all lines.

1:15:35
This is an enhancement that allows that allows asset processors to load lines individually by load type.

1:15:44
That's for special cases.

1:15:46
Most of the most of the time we recommend to load all lines of a single interface ID at once.

1:15:52
However, we do have a small caveat here that you are currently limited to load only one interface load type at a time.

1:16:00
We'll provide an update via Daily Mail when that changes.

1:16:05
Finally, there is a new link to the Process Monitor right here on the top of the page to the right.

1:16:12
Reminder that you should always visit this page to review whenever running any process, and it's now conveniently right here on the Asset Processor's main transacting page.

1:16:29
Additional links have been added to the Asset Work Center.

1:16:32
You won't see links to pages your role doesn't have access to.

1:16:37
Asset Processors have gained the Consolidate and Unitized pages.

1:16:41
The new Physical Inventory section has been added.

1:16:45
Most asset roles have access to some of these, but physical inventory processors can now define progress and review inventories right here on the Work Center.

1:16:56
Reminder that the retirement pages have been renamed for the Financial asset processors.

1:17:02
All other pages are of course still accessible through the Navarre.

1:17:12
Asset Tracking Dashboard Now Asset Management has been using the Fluid interface since fiscal year 2017.

1:17:21
Up until now, employees with asset roles signing in on mobile devices would immediately start on the Asset Tracking dashboard.

1:17:29
With Fluid now activated for the rest of Core CT, those employees will have to navigate to Asset Tracking from any homepage.

1:17:38
You can click the upper left drop down to get to the Core CT Financials homepage.

1:17:43
There you'll see the Asset Management tile to take you to the Asset dashboard, and once there, you'll see the Asset Tracking tile as one of our three tiles.

1:17:54
Don't forget that the tiles are role specific too.

1:17:56
For instance, only physical inventory scanners will see the physical inventory tile.

1:18:09
Finally, we've been asked to share several out of core asset changes.

1:18:14
Several key documents have recently been updated for your review, the Property Control manual, the Co 853 and the Co 59, the latter of which is now overseen by the OSC Budget and Financial Analysis Division.

1:18:29
The Co 853 has been broken out into several forms.

1:18:34
Both the 853 and 59 can be submitted directly to their web pages or on the Red Tree web pages.

1:18:41
Sorry.

1:18:42
Note that the forms now have a dedicated e-mail address for questions and submittals.

1:18:52
Thank you for listening.

1:18:54
Does anyone have any questions or do we have any questions in the chat?

1:19:01
There is one question in the chat.

1:19:03
DCF tried completed the CO1092 form to add the approver and was told we cannot do it by core until we go live on the 25th.

1:19:14
That's right.

1:19:15
The role won't exist until Monday for financial security liaisons to add it.

1:19:20
But it's important to identify that role right now for all agencies so that those financial security liaisons can add it first thing Monday.

1:19:29
And again, financial asset processors shouldn't submit either of these two types of transactions until the day after that because it does take a overnight batch to assign those approvers.

1:19:40
So that that I love the initiative though, for trying to get it assigned now, but it won't be possible until Monday.

1:19:49
There's one more question.

1:19:50
You said that we can dispose multiple transactions at once.

1:19:54
Is that correct?

1:19:55
A list will display for disposal.

1:19:58
You can do that today.

1:20:00
In asset management using the disposal worksheet, your financial asset processors have had access to the disposal worksheet for a long time now.

1:20:09
So what's going changing going forward is that that's the only way that they can dispose assets going forward because that's the only way that it will root for approval.

1:20:17
So yes, you can submit multiple assets for in one request.

1:20:22
And that's actually why asset management approvals are different from every other module.

1:20:26
It's because we have one request with lots of different items on it.

1:20:29
So we actually have line level approvals, whereas no other module has that.

1:20:34
That's why our notifications and emails work slightly differently than other modules.

1:20:38
And that's all covered in the L200 training where we have those recordings posted online for anyone to view right now.

1:20:53
There's another question.

1:20:55
Physical inventory tab can only be visible if scanner is used.

1:21:01
Does that impact acting upon annual inventory running queries or it only related to use of scanners?

1:21:09
So it sounds like there's a little confusion there.

1:21:11
The physical inventory tile is only accessible to your physical inventory scanners.

1:21:18
It's people with the physical inventory scanning role, which no other asset role can have that role.

1:21:23
You know, there's lots of, there's segregation of duties within each of the asset roles.

1:21:29
So only your physical inventory scanners can access that tile and that tile is only used to scan for inventory.

1:21:37
There's a lot of other physical inventory pages that have been added to the asset work center that you can use to do things like review scans of those scanners in a particular physical inventory.

1:21:55
That looks like that's it for the questions.

1:21:58
I do see one hand raised by someone.

1:22:01
I'm not sure if that is anyone waiting to be called on, but they can't speak, but we'll just wait to see if there's any questions later.

1:22:09
I guess for now, I will hand the reins off to Wendy Monk who will be covering EPM.

1:22:18
Good afternoon.

1:22:19
I'm Wendy Monk.

1:22:20
I'll be explaining some things on EPM and STARS.

1:22:24
The changes for POM.

1:22:27
We'll go to our first slide, EPM Navigation.

1:22:32
EPM POM favorites Stars Navigation for EPM, our navigation is going to be the old style navigation, which will be on the right hand side.

1:22:45
You'll go to main menu core, CTEPM reporting tools and query manager.

1:22:53
You can then edit 1 palm when you're when you're ready, you can add it to your favorites.

1:22:58
You can even do it alphabetically.

1:23:00
Use a setting the little the little round tool and you can make it affable affability in your settings.

1:23:08
Next slide run controls will not be deleted.

1:23:16
Pre scheduled reports or queries will have to be rescheduled.

1:23:21
Private queries will not be deleted.

1:23:25
EPM queries will be erased.

1:23:28
Go in now take note of everything that you have as a favorite.

1:23:32
Take a snapshot of your phone if you have to, and when Palm goes live, just make them your favorites again, Stars navigation.

1:23:43
It has a tile.

1:23:44
It'll be on the left hand navigation where you see, you know, core CTHRMS, core CT help, what have you.

1:23:52
And stars is on the bottom.

1:23:54
Just click on it.

1:23:54
You'll get into the Obi platform and that's it.

1:23:59
Does anybody have any questions?

1:24:05
No questions.

1:24:06
Thank you.

1:24:14
Hi, good afternoon.

1:24:15
My name is Dustin Garino.

1:24:17
I do the fence security here at Core CT.

1:24:20
So this will be the quickest part of this presentation.

1:24:23
We have one slide.

1:24:25
A new financial security tile will be available for those users that have security roles.

1:24:30
So if you do not have any Co 1092 roles, you're not going to see the tile at all.

1:24:35
It can be found by selecting Core CT Financials the homepage from the drop down menu here.

1:24:42
Users assigned the CTCO 1092 Liaison role can access the Co 1092 Security Request tile to create their FIN Co 1090 twos.

1:24:53
Users assigned the CTCO 1092 Approving Manager role will be able to access the Manager Approvals tile so that you can approve your Co 1090 twos there.

1:25:03
And then if for certain people with DAS and OSC that also approved ECO 1090 twos at different levels, they'll be able to access that third security approvals tile on this page.

1:25:15
So basically the only change is how you can navigate here.

1:25:18
You can still go through the NAV bar, but these tiles are your shortcuts.

1:25:22
The pages themselves will function as they do today, and you will still receive e-mail notifications when it's your turn to approve.

1:25:32
And also on the new notifications bell, it'll come up with the Co 1092 transaction number.

1:25:39
So you'll see you have something pending as well.

1:25:43
And with that, if you have any questions, no questions, there is one in the Q&A.

1:25:58
It actually pertains to EPM.

1:26:00
Is there any documentation about how the addition of the chart field refilled impacted EPM tables?

1:26:06
For example, in any tables with financial data, is there now an option to return chart field 3 fields?

1:26:30
Wendy, are you available?

1:26:32
Yes, sorry about that.

1:26:33
In chart field 3 for EPM, it's not going to be available in EPM at all.

1:26:38
You're going to have to get any information regarding chart field 3 and stars.

1:26:48
OK, And there's another question for EPM queries.

1:26:51
Some queries were set up prior to my starting date in this office.

1:26:55
How would I retrieve the query set up information?

1:26:59
All your private queries are going to come over.

1:27:01
All your private queries are going to come over.

1:27:03
The only thing that you're going to have to change is just you're going to have to notate all your favorites and bring them and make them your favorites in POM.

1:27:10
Did did I enter that correctly?

1:27:24
OK, that looks like all of questions.

1:27:32
Oh, good morning or good afternoon.

1:27:34
I'm Shannon Reuter from the Core CT Help Desk and I'm going to discuss the Footprints module, Core CT home page, or Core CT website clearing cache and browser information and reminders.

1:27:55
We encourage everyone to log a ticket.

1:27:57
The help desk answers the tickets as quickly as possible when the tickets are submitted.

1:28:02
Keep an eye out for emails.

1:28:04

When you have a ticket open, Core CT Help Desk will communicate through the ticket and you can respond to the e-mail and that will attach your response to the Footprints ticket and it will also notify the help desk that you have responded to the ticket.

1:28:21
Footprints routing.

1:28:22
The tickets are routed directly to the team that handles the module, so pass the processing.

1:28:28
Footprints access.

1:28:29
If you are in need of any footprints access, we're having problems with passwords, please e-mail the readiness mailbox with the subject footprints access and we will address that for you in the readiness mailbox.

1:28:43
If you have an e-mail address that does not end in ct.gov, you can e-mail the readiness mailbox that helps us to create Footprints ticket on your behalf.

1:28:52
Again, please watch for emails this Footprints.

1:28:56
You will still receive the Footprints emails even though you don't have Footprints access.

1:29:00
You will also still be able to respond to the e-mail and it will attach it to the ticket and notify the help desk that you have responded.

1:29:08
Please refrain from reaching out to the module lead because we need to document every issue that comes in, especially after this upgrade.

1:29:19
The Core CT Modernization page is where you'll find all of the decks from any previous change agent meetings along with recordings, transcripts and Q.

1:29:29
And as a link to the Core CT COM Upgrade Training Registration page also contains the L100 classes, which are the ones that are previously recorded.

1:29:45
And you can also find the e-learning modules, which are 10 to 15 minute training modules that can be viewed at any time at your own pace.

1:29:55
And these steps can also be saved as APDF.

1:29:58
As a reference, L200 courses that cover more complex topics are currently available as they were instructed LED training sessions.

1:30:10
You can download and watch any recording, the transcripts and view the Q&A S There's also the new link on the Core Modernization page for the Core CT Plum Upgrade Training support.

1:30:27
Here you'll find Infographics which are one page documents that recap cross module topics such as navigation and approvals.

1:30:36
You will also find Job Age, Job Age which are printable documents outlining business processes and steps.

1:30:43
Within Core.

1:30:44
You'll find the e-learning modules here which are the 10 to 15 minute training modules that can be viewed at any time at your own pace.

1:30:54
And again you will also see the L200 courses here you can download and view.

1:31:03
It is important to clear your browser cache, especially when logging into four CT for the first time after the upgrade.

1:31:10
You should also clear your cache any time something doesn't look right to you is the one of the first things the help desk is going to ask you is if you have cleared your cache.

1:31:20
If you're having any problems with your browser, you can try using a new window will be in the Incognito mode or use an in private window in Microsoft Edge.

1:31:35
There are just a few reminders I have.

1:31:37
Your favorites will not carry over with the upgrade.

1:31:40
Again, take screenshots, do whatever you have to do, write them down so when you do, when Core comes live on Monday, you'll be able to recreate all your favorite.

1:31:50
Your run controls will carry over, so there's no need to worry about those.

1:31:56
And Punch Out will not be available on any mobile devices.

1:32:00
Again, the scheduled report and queries will need to be rescheduled.

1:32:04
So anything that you have outstanding that runs daily automatically, you'll need to reschedule those.

1:32:12
And last but not least, all obsolete devices will not be supported.

1:32:18
Any device must have an up to date browser properly accessed or CT and the device operating system and software apps, the App Store, everything has to be up to date in order to work correctly with the fluid.

1:32:35
New fluid system and core and if a manufacturer stops supporting any device will not be able to be updated which then in turn you will not be able to use it when in the new core with fluid.

1:32:51
Are there any questions?

1:32:59
OK, Can you please show where to search for supplier vendor and also where to find supplier update request forms when submitting a change for an existing vendor and core?

1:33:13
I can take that one.

1:33:16
So as I mentioned earlier, the main menu is now moving over to the NAV bar menu.

1:33:22
And when you click on the NAV bar, it will show you the form right under financials as it does today.

1:33:34
But it's not a home page, it's has to.

1:33:36
You have to go through the NAV bar to get it.

1:33:43
OK.

1:33:43
There's another question regarding chart field 3 and EPM.

1:33:48
Will chart field 3 be available to run flexible Ledger analysis reports because that appears to be part of FIN rather than EPM, if that questions for me for EPMI was advised.

1:34:03
No chart field 3 will be in EPM, no reference of Chartfield 3 will be an EPM only and stars will it be updated?

1:34:15
So I'll just pop in.

1:34:17
The flexible Ledger report is a general Ledger report.

1:34:21
So Jim Klaben, it should be available on the flex Ledger report.

1:34:26
Can you confirm that?

1:34:31
I'm not sure Jim is in this meeting, Donna.

1:34:34
Oh, that's right.

1:34:35
I'm sorry, wrong group.

1:34:37
It should be, it should be in there.

1:34:39
It's AGL report, it should be in there.

1:34:41
I'll double check that and get back.

1:34:46
OK.

1:34:46
And going back to regarding special requisitions with multiple lines, would contract number auto fill for the remaining lines after entering it in the first line in the rest?

1:34:59
And are there options to update the contract number manually per line?

1:35:06
Can you repeat that last part, Shannon, please?

1:35:10
Yes.

1:35:10
And are the options to update contract number manually for line.

1:35:16
So the functionality of copy down the contract ID if the first line has the contract ID and the remaining lines are purchasing authority contract and the contract ID is blank.

1:35:33
If you hit save or if you hit submit, the contract ID will copy onto the blank fields on the next lines and you also have the ability to enter them manually.

1:35:53
OK will there be more L200 instructor LED courses?

1:35:57
No, there will not be, but you can review all the classes that have then completed the recordings are out there, the transcripts and the Q and as and the decks and just on the chart field 3 on flex Ledger analysis, it's there.

1:36:17
Also if you have any questions about the L2 hundreds, the instructions are to submit a footprints ticket with any questions.

1:36:24
OK.

1:36:24

And then regards to chart Field 3, if Chart Field 3 is needed in EPM, please log a Footprints ticket including the explanation and justification to have it added to EPM.

1:36:49
And that's all we have for questions.

1:36:51
I'm going to turn it back over to Brienne for the closing.

1:36:55
OK.

1:36:56
So thank you, Shannon.

1:36:57
Thank you everyone for your participation today.

1:37:00
We hope that this information we provided you is something that you'll take back to the your colleagues and share.

1:37:08
We will be posting this presentation, maybe not today because we have to go through DAS to do so, like Donna said earlier.

1:37:17
So Please be patient.

1:37:18
We will be posting it.

1:37:21
Do we have any further questions before we conclude the meeting?

1:37:26
There is another one when core times out and I log in again, the login page is different.

1:37:32
Originally, I sign in on Core CT and when it times out, at times the login page is Oracle PeopleSoft.

1:37:40
I log in, but nothing shows up from the normal view of Core CT, my HR, finance, et cetera, tabs and personal information, time and labor sections, Core CT, news, et cetera.

1:37:54
OK, this sounds like a cash issue.

1:37:56
It is important that if you do get kicked out of Core CT that you immediately clear your cache and browsing data, but I would recommend if it persists to grab some screenshots and open up a help desk ticket and we would be happy to further assist.

1:38:15
Just to note, that's not upgrade related because we haven't upgraded yet.

1:38:19
Correct?

1:38:21
That is not upgraded related.

1:38:22
That had yeah, but the but the advice still holds.

1:38:25
Same advice.

1:38:27
OK.

1:38:27
And somebody said where can we find the recordings?

1:38:30
They will be posted on the Core CT monetization page exactly where you signed up for this user group.

1:38:40
And will the training material be posted this week?

1:38:43
We will try to get that done.

1:38:50
That looks like that's it.

1:38:52
Can I just jump in really quick?

1:38:53
I just tested the budget check for purchase orders and I just wanted to confirm when you click the budget check, I wanted to see what was going to happen.

1:39:00
It just says not checked.

1:39:02
Nothing happens.

1:39:03
So you'd have to get all approvals done ahead of time like Donna said, Thank you, Susan.

1:39:12
I oh thought you had a question.

1:39:17
Scott, do you have a question?

1:39:19
I was trying to review the questions or the, the raised hand.

1:39:23
Sorry.

1:39:24
Perfect.

1:39:26
Now's the time.

1:39:27
So if there's no more further questions, again, this does conclude the meeting.

1:39:33
Good luck and we look forward to hearing from you.

1:39:37
Thank you very much.

1:39:40
Thanks everybody.