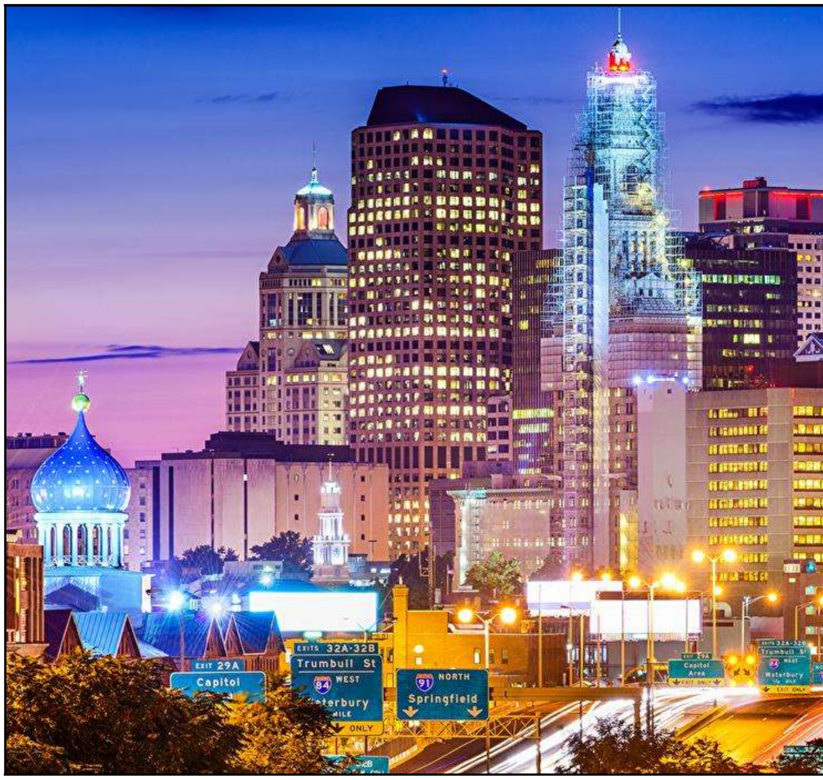

Core-CT

Asset Management Approvals L200

Core-CT Staff Training Guide

August 2024

Welcome everyone to the Asset Management Approvals L200 training session. This training is designed to provide Agency Asset Teams with the necessary knowledge and skills to manage asset management approvals effectively. Specifically, this is geared toward users with the Financial Asset Processor and Asset Approver roles.

My name Scott Przygocki

>JUAN: And my name is Juan Diaz

Together we oversee the Asset Management Module within Core-CT Financials, with me as the Team Lead. We're also joined by our course facilitator *Shaun/Shannon* from the Core-CT Help Desk.

In this course we'll cover navigating the new fluid interface for Asset Management Approvals as well as submitting and approving asset disposal and interunit transfer requests.

Course Intro

Welcome to the AM Approvals L200 Course

Core-CT

We will explore the enhancements introduced by the upgrade to PeopleSoft.

Some guidelines for today's class:

- Put cell phones on silent or vibrate
- Ask questions and remain engaged
- Course will provide overview of system upgrades and changes

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A few important guidelines for today's session.

- Please set your cell phones to silent to minimize distractions.
- Feel free to ask questions throughout the session by typing in the chat and *Shaun/Shannon* will bring them to our attention periodically. We'd like to clarify any confusion and promote a comfortable learning environment as much as possible.
- We will highlight the system upgrades and changes that are relevant to your roles.
- These guidelines aim to enhance your learning experience and ensure effective communication.

Trainer - Facilitator – Participant Roles

Trainer

- Cover course content
- Speak to the functionality
- Answer any questions at the end of each section

Facilitator

- Share the presentation: [Training Material Location]
- Manage time
- Direct questions from participants to the Trainer at the end of each section
- Share the course evaluation survey: [Asset Management Approval Course Survey]

Participants

- Ask questions in the chat throughout the training

NOTE:

** Unable to turn on camera*

** Unable to speak*

We also want to give a brief rundown of *who* is in this training. We have Juan and I who are the trainers and will be leading the course doing most of the speaking. *Shaun/Shannon* is our facilitator who will bring you questions to our attention and will be guiding us through the presentation as a whole. Then we have most of you: our participants! With this webinar you won't be able to speak, so please do get any questions in the chat as soon as you think of them.

Now let's get started with the training!

Who Should Take This Course?

Financial Asset Processors	**One of two main transacting roles within Asset Management. They will be the requesters who submit Disposal and InterUnit Transfer transactions for approval**
Asset Approvers	New role (CT_F_A_ASSET_APPR) currently available to be assigned to anyone who doesn't have the Financial Asset Processor role, at your agency's discretion. Agencies should have this role assigned to an eligible employee immediately on the first day of go-live.

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As we mentioned, this class is geared towards two roles that will be involved with the new Asset Approval process. All agencies already have Financials Asset Processors who will become the requesters. They submit the asset transactions, and there are two types of transactions that they are *already* familiar with which will now route for approval: Disposals and Inter-Unit Transfers.

The new Asset Approver role will need to be assigned to an employee within your agency who will review and ultimately approve or deny the requests. This role currently has only one conflict and its with Financial Asset Processor role. Anyone else in your agency can get the Asset Approver role, and your Financial Security Liaison should have plans to assign it on the day we go live with the upgrade.

Financial Asset Processors should hold off on these transaction types until their Asset Approver has been confirmed to have the role.

Why is AM Implementing Approvals?

- Central Accounts Payable, Security and Asset Management identified a financials 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

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So – the big question. Why is this being implemented now when you've never had any issues with these transactions? Well, a financial security concern was identified with individuals removing assets unchecked.

The other supply chain modules were looked, and Approval Workflow proved effective at providing them with similar checks and balances.

The State's Security and Asset Management division found resolution in having Core-CT Assets also implement it.

This is the least intrusive way of getting adequate internal controls applied for financial asset removal.

Course Intro

Learning Objectives

At the end of this course, you will be able to:

- Access Asset Management Approval Fluid Pages
- Manage And View Pending Approvals
- Understand the new Asset Management Approval Processing
- Walk through the following Asset Management Approval scenarios:
  - » Submitting/Approving Disposal Worksheets
    - Loading a Transaction into AM/Validating Asset Status
  - » Submitting/Approving Interunit Transfers/Validating Asset Move to a New BU

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Now, our objective with this course is that by the end participants will be able to:

Navigate through Asset Management Approval Fluid Pages efficiently.

Grasp the new Asset Management Approval process.

Submit, view and manage pending approvals with ease.

And verify transactions completed as expected.

We're going to cover the following Scenario Walkthroughs:

•Disposal Worksheets and Interunit Transfers

•Going forward, only the disposal worksheet will be used to retire assets.

*Now, Financial Asset Processors are already familiar with both of these transactions and their pages. However, instead of immediately generating a retirement interface or immediately becoming another agency's asset, these transactions will now first be sent as requests to approvers.

Course Intro

Course Overview and Objectives

Overview of new UI, use cases, and key terminologies for AM approvals

New system features resulting from the PUM 9.2 48 upgrade include:

- Upgraded Fluid Dashboard Interface
- AM Approvals is accessed through Fluid Tiles and the Notification Panel
- Managing Asset Management Approvals
  - Disposal Worksheet
  - Interunit Transfer
- Validating Asset Status
  - Confirm Status
  - Confirm Cost Balances
  - Confirm New BU for IUTs

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The course aims to ensure users can effectively navigate the New Fluid User Interface to access all components of the approval process.

Existing Asset Management users have the benefit of already having experience with fluid navigation as we've been using it since 2017, though only on mobile devices for a few tiles or pages that have to do with asset tracking.

We're going to focus on how to submit requests within the Asset Management WorkCenter and utilize the Pending Approvals tile to manage those requests.

Today’s Agenda

Section	Duration
Course Overview and Objectives	5 minutes
Accessing AM Approvals Pages	5 minutes
QA	7 minutes
Unit I: Disposal Worksheet AM Approvals	5 minutes
Scenario 1: Submit Disposal Worksheet	15 minutes
QA	7 minutes
Scenario 2: Approve Disposal Worksheet	15 minutes
QA	7 minutes
Scenario 3: Review and Load Interface	15 minutes
QA	7 minutes
Scenario 4: Validate Asset Disposal Status	5 minutes
QA	7 minutes

Section	Duration
Unit II: Interunit Transfer AM Approvals	5 minutes
Scenario 5: Submit Interunit Transfer	15 minutes
QA	7 minutes
Scenario 6: Approve Interunit Transfer	15 minutes
QA	5 minutes
Scenario 7: Validate Asset Transfer	5 minutes
Review	15 minutes
QA	7 minutes
TOTAL	**2 hour**

Here we have a breakdown of the course’s agenda

- Today’s session could take up to 2 hours
- We will review key units related to the training material.
- We’ll have a recap of what we learned, and you can see we have plenty of periodic breaks to address any questions you might have.
- We’ll have two main Units which will be our example scenarios for the two different transaction types.
- This structure is designed to maximize your understanding and engagement with this new process and user interface.

Key Terminology

Key Term	Definition
Fluid Pages	Fluid Pages are designed so that they can be accessed from multiple devices including desktops, mobile-phones, and tablets.
Homepage	Homepages are the starting point for navigation in fluid. A default homepage displays after login; however, users can have multiple homepages depending on their roles, Additionally, homepages give users access to function-based tiles.
Dashboard	A dashboard is an underlying page, that organizes functionality, which can be accessed via a tile or link.
Tile	Tiles are a button found on fluid homepages, which act as links to business transactions, and provides a snapshot of application content.
WorkCenter	Simplifies navigation and provides a central place for completing work and activities.

This is a list of key terms that are relevant to this training. Understanding these terms will enhance comprehension and facilitate effective communication as they will be referenced during the session. We'll take a moment to go over these to help you get familiarized with them. Please pay close attention, as these concepts will be integral to our discussions and will also help you with new Core-CT in general.

Fluid Pages – this is the new sort of bubbly look many pages of Core-CT are switching to. This implementation is to make the system more accessible over a wider array of devices.

Homepage – Starting pages where you can quickly access main system content areas and are selectable in the top left dropdown when first logging into Core-CT. In this training we'll only be working in the Financials Homepage.

Dashboard – very similar to homepages, dashboards are specific to modules and are used to quickly access an array of their pages. In this session, we're only going to be covering the Asset Management Dashboard. Ours is simple; we only have three tiles and we're only going to access two of them today.

Tile – Tiles are large, button like navigation tools with icons that we use to accesses pages and dashboards.

WorkCenter – All users should already be familiar with this term. WorkCenters are module specific and host a variety of tools and pages in a centralized, quickly navigational section. However, many modules, including Asset Management, have enabled Fluid WorkCenters. They're still very similar to their Classic counterparts, but again have that new look to make them more accessible over a variety of device types.

Ok, so we'll briefly pause here to see if anyone has any questions about the terms or any of the other overview material.

(Wait)

Alright, we'll continue on. Juan's going to take the reigns to cover the first unit: Disposal Worksheet Approvals.

Unit 1: AM Disposal Worksheet Approvals

When do we use AM Approvals?

All asset disposal requests will be sent for approval. Asset Approvers users will approve, hold, or deny AM disposal worksheet requests as part of their role.

The **Asset Management Dashboard** can be accessed from the **Core-CT Financials** Homepage. From there we will use both the **Asset Management WorkCenter** tile, and the **Approvals** tile.

Additionally, Approvers can utilize the **Bell Icon** to access the **Notification Panel** and navigate to **Approvals**

Hello again, everyone!

In this first unit we are going to cover Disposals or Retirements, all of which will now be routed for approval. This is going to be done using the existing Disposal Worksheet page that Financial Asset Processors already have access to where they can efficiently submit multiple assets for retirement with one transaction.

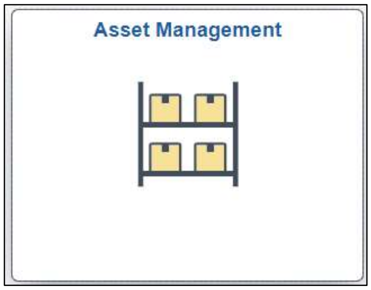
What's new is that approvers will then Approve, Deny, or temporarily Hold disposal transactions.

The new Fluid navigation will allow quick and clear access throughout Core-CT. Whenever a user needs to do something related to Assets, they'll start off by going to the Core-CT Financials Homepage where they can click on the Asset Management tile to get to the AM Dashboard.

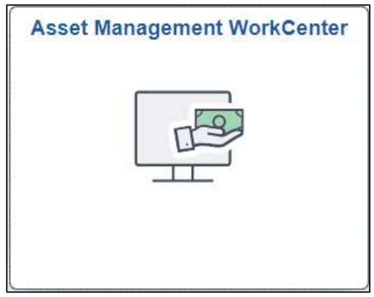
Requesters and Appro**vers** will also be able to review some request details through Notifications.

Overview of Asset Management Tiles

Managing AM Approvals: The below tiles are used to access AM pages and to manage AM approvals



Asset Management Tile:
Used to access Dashboard of Asset Management components



Asset Management WorkCenter Tile:
Used to access the Asset Management Workcenter page

Approvals Tile:
Used to view and manage pending and historical approval request

Here we see some key asset tiles. Like previously mentioned, the Asset Management tile itself will be on the Core-CT Financials Homepage and will take users to the Asset Dashboard, where all other asset-related tiles are.

The Asset Management WorkCenter is a central source for managing assets. Therein, Financial Asset Processors specifically will have a link to the Disposal Worksheet page to submit these requests.

The Asset Management Dashboard will also have an Approvals tile. Once they receive a disposal request, appro**vers** navigate to this tile to manage the request.

Scenario 1: Submitting Disposal Worksheet

In this scenario, you'll be shown a walkthrough on how to Submit a Disposal Worksheet

What we will accomplish:

- AM Approvals Fluid Navigation
- Submitting Disposal Worksheet

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Now we'll dive into an example to guide you through submitting a disposal worksheet request.

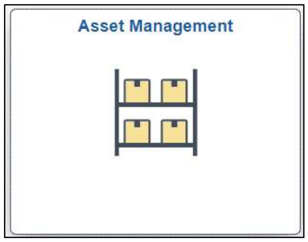
In the following scenarios we'll learn how to navigate through fluid to related pages effectively, and show step-by-step instructions on how to submit a disposal worksheet transaction.

Our objective by the end of this section is that you'll feel comfortable with this new approval process.

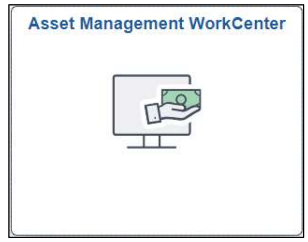
Submitting Disposal Worksheet Requests

Role: Financial Asset Processor
Navigation: Core-CT Financials > Asset Management> Asset Management WorkCenter > Disposal Worksheet

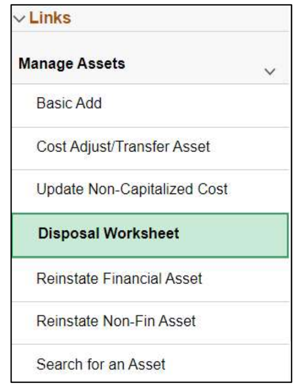
Core-CT Financials



Asset Management Tile



AM WorkCenter Tile



AM Navigation Collection:
Disposal Worksheet

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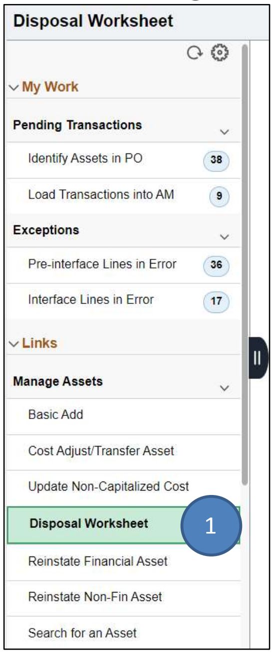
First, we need to submit a disposal transaction. Just like up until now, this will be done by Financial Asset Processors, and they'll be doing so using the Disposal Worksheet page they're already familiar with.

Here we show a comprehensive navigation to get to that page. The path is Core-CT Financials, Asset Management, Asset Management WorkCenter, Disposal Worksheet which is in the Manage Assets section.

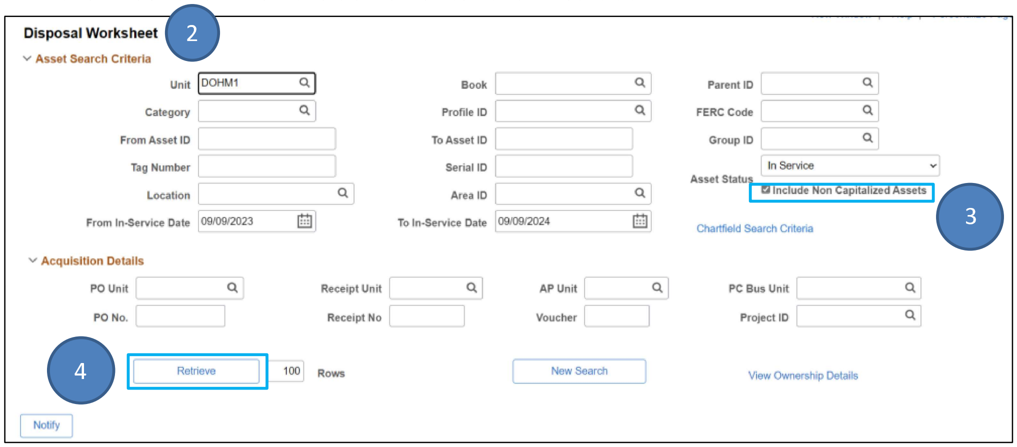
Again, only Financial Asset Processors can see this page.

Submitting Disposal Worksheet



The submit a disposal worksheet navigate to the **Mange Assets** tab accessible from the WorkCenter

1. Select **Disposal Worksheet**
2. Enter asset search criteria (i.e., unit, tag)
3. **Note:** toggle **Include Non-Capitalized Assets** checkbox if relevant to request
4. Click **Retrieve** when the search criteria is filled out.



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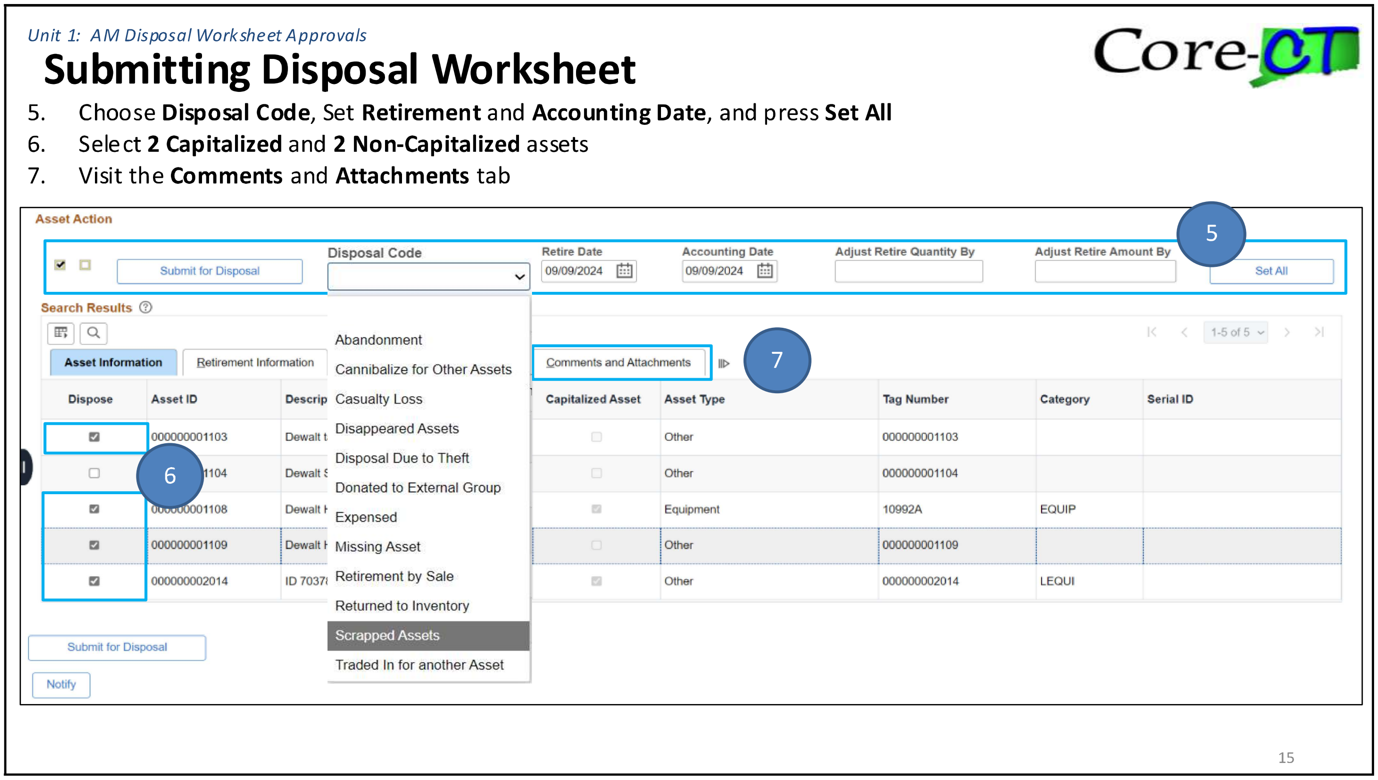
Here you can see an expanded version of the Asset WorkCenter's menu on the left. Once you click on the Disposal Worksheet, simply enter the search criteria for the assets you want to dispose. You can narrow down to a specific asset or pull up a range based on how you populate this section. The only *required* fields are **Business Unit** and **In Service Asset Status**, though we do want to point out the **Include Non-Capitalized Assets** checkbox located by number three. This needs to be toggled if any of the assets that you're trying to dispose are non-capital, otherwise known as controllable.

Once your criteria is in, click the Retrieve button.



A list of assets will be shown based on your search criteria.

You'll also see the Asset Action section which is where transactional information will be entered. Choose a disposal code from the drop down (usually Retirement by Sale or Scrapped Assets) and set the Retire Date equal to the date your agency physically released the assets. Choose an Accounting Date in the currently open period and click the **Set All** button to quickly apply this information to all the below assets.

Then refer to the Asset Information tab to identify the assets you want to dispose and toggle their checkbox in the Dispose column.

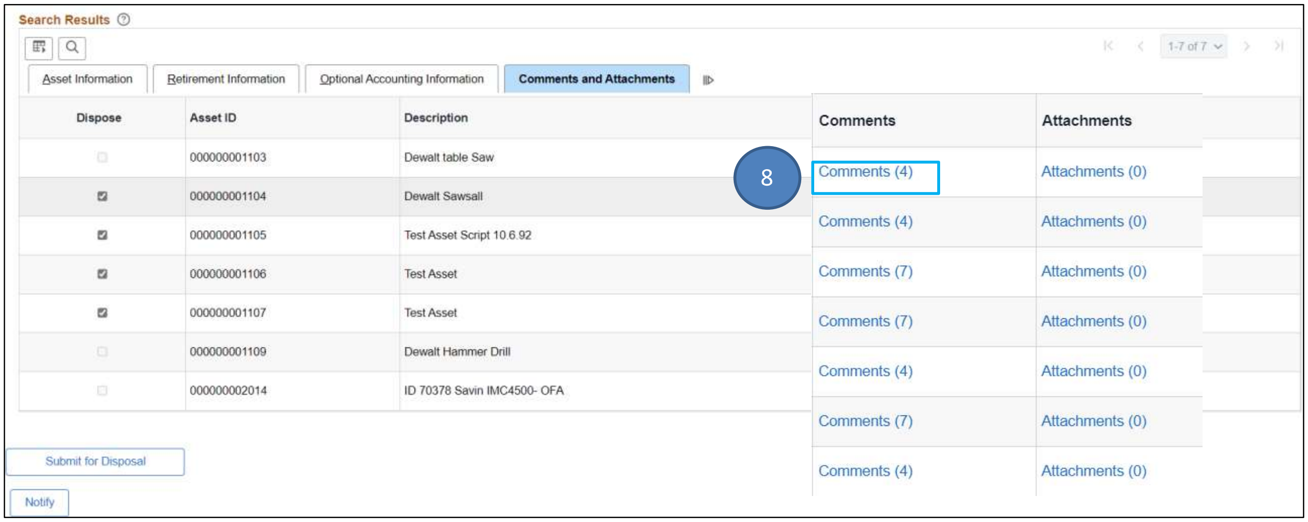
You can review additional details on the other tabs, but for now we'll continue to the **Comments and Attachments** tab to include additional submission information.

Unit 1: AM Disposal Worksheet Approvals

Submitting Disposal Worksheet

This is Comments and Attachments tab, from here you can access and review applicable comments and attachments

8. Select the **Comments** link



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A new feature for the Disposal Worksheet is direct access to Asset Comments and Attachments links right on this tab. These were previously only available on Basic Add.

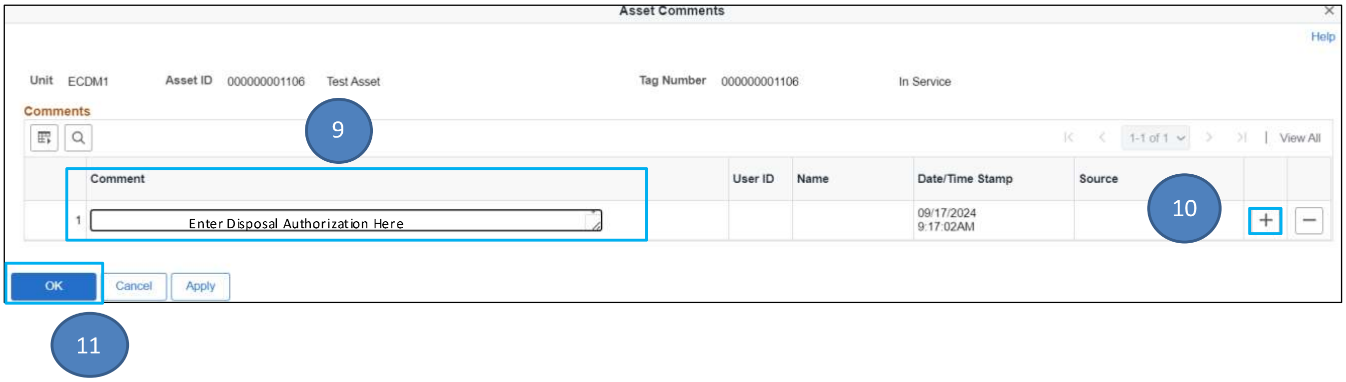
These links are crucial for complying with Central Accounts Payable Security and Asset Management's new policy regarding disposal authorizations. Previously those authorizations were entered in the Reference Code field which is not available on the Disposal Worksheet. These will now be entered on a new Asset Comment line which can be accessed right here.

Unit 1: AM Disposal Worksheet Approvals

Submitting Disposal Worksheet

Upon clicking the Comments link the **Asset Comments** box displays

9. Add a Comment to enter the **Disposal Authorization**
10. Use the **+** to add a new line when applicable
11. When completed press **OK,** you will be returned to the disposal worksheet page



17

After clicking the comments link, a pop-up window will appear with the asset's comment history. Click the plus sign to add a new row and input the Disposal Authorization. This is typically the Auction Number supplied by DAS Procurement's Surplus System.

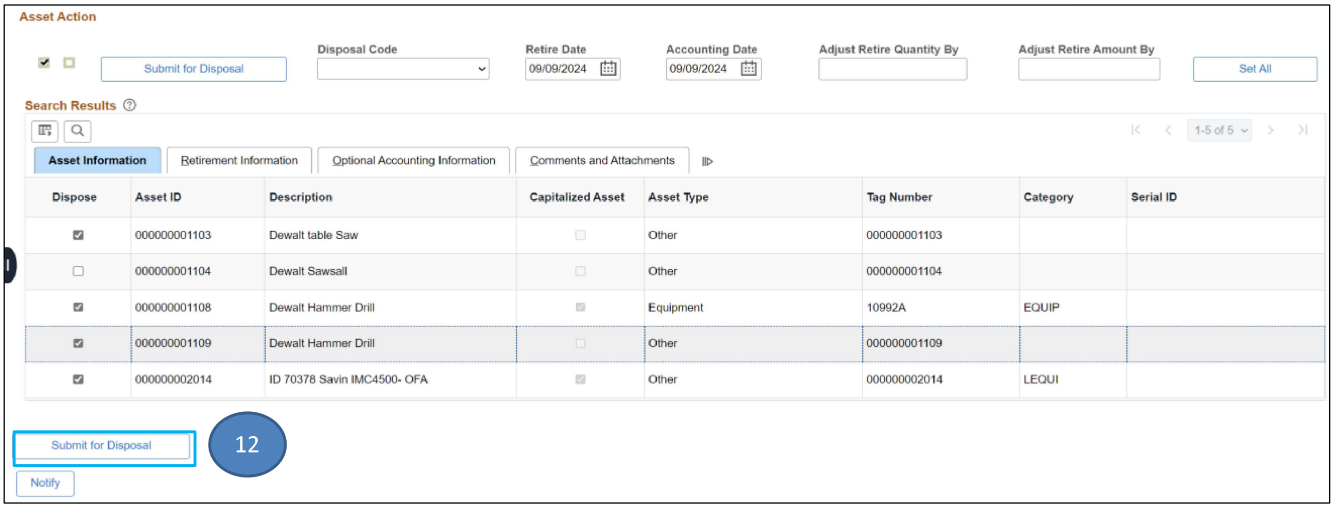
This allows for clear, quick access for documentation on these assets.

You can add any other comments as you see fit. Once complete, click the OK button to close the pop-up.

Unit 1: AM Disposal Worksheet Approvals

Submitting Disposal Worksheet

12. Press **Submit For Disposal**



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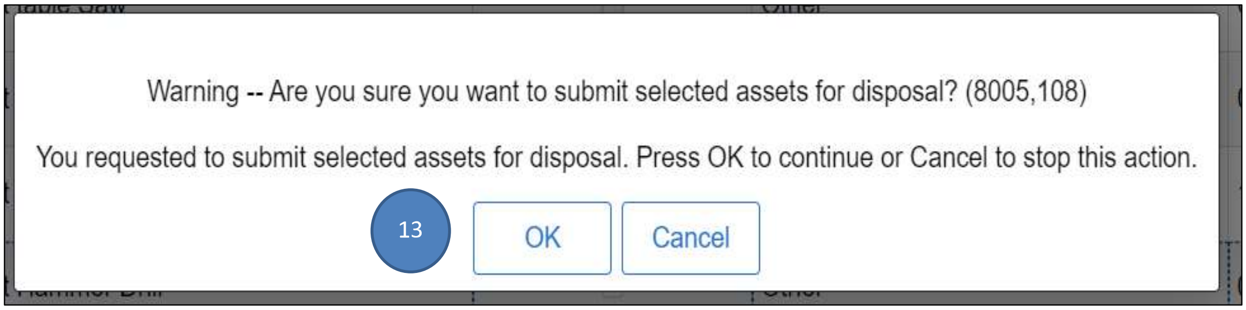
After entering the Disposal Authorization, we'll move forward with the transaction process. Review tabs and fields to ensure accuracy and finalize the selections. Once certain, click the Submit for Disposal button.

Submitting Disposal Worksheet

13. After clicking submit a warning box displays, Click OK to proceed (A Saving Page message will display when disposal has been submitted)



After clicking **Submit**, a warning box will appear on your screen. If you want to double check anything, click Cancel to go back to the last step, otherwise click **OK** to finalize the submission.

Submitting Disposal Worksheet

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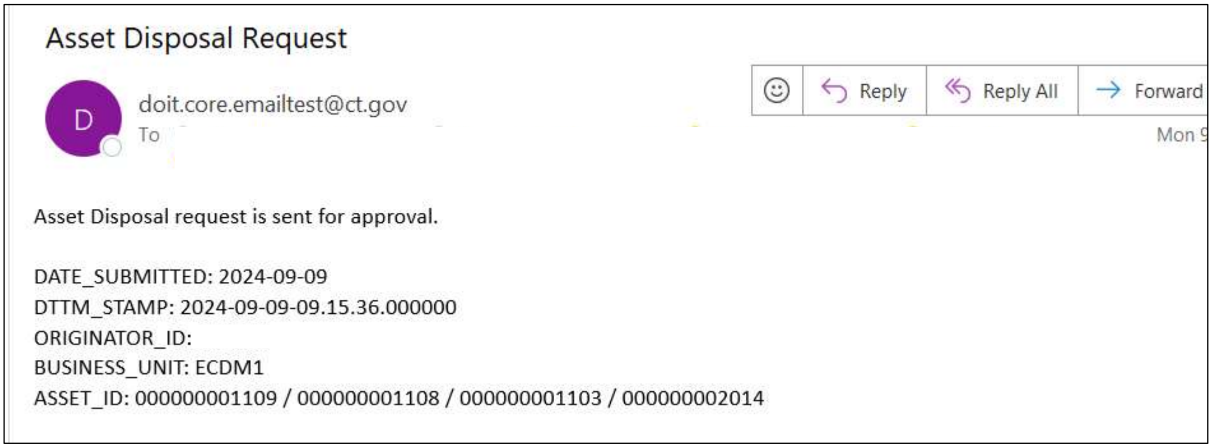
Upon submitting the disposal worksheet, the approver receives an email for the pending request



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Once the disposal worksheet is submitted, the appro**ver** will receive an email that indicates they have a pending request awaiting approval. It provides some key information like who submitted the request, when it was submitted, for what Business Unit, and lists the assets.

That’s it for submitting a disposal request. Next, we’ll take a look at the appro**ver**’s process, but let’s take a minute to review any chat questions.

PAUSE

Scenario 2: Approving Disposal Worksheet

In this scenario, you'll be shown a walkthrough on how to Approve a disposal worksheet

What we will accomplish:

- AM Approvals Fluid Navigation
- Approving/Denying/Holding disposal worksheet

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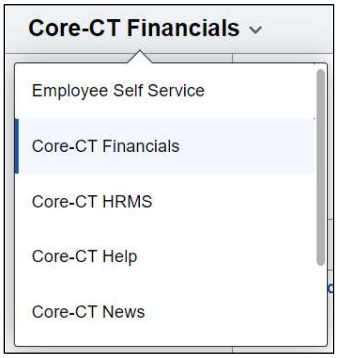
In this next scenario we'll again learn how to navigate through fluid to approval pages, but this time we'll show how to act on disposal requests.

Our objective by the end of this section is that you'll feel comfortable with your new role as Asset Appro**ver.**

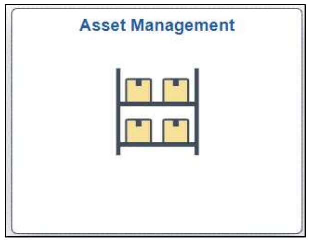
Approving Disposal Worksheet

Role: Asset Approver

Navigation: Core-CT Financials > Asset Management> Approvals Tile *or* Notifications Icon > Notifications Panel

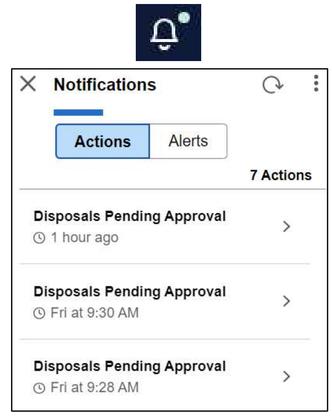


Core-CT Financials



Asset Management Tile

Approvals Tile



Approvals Panel

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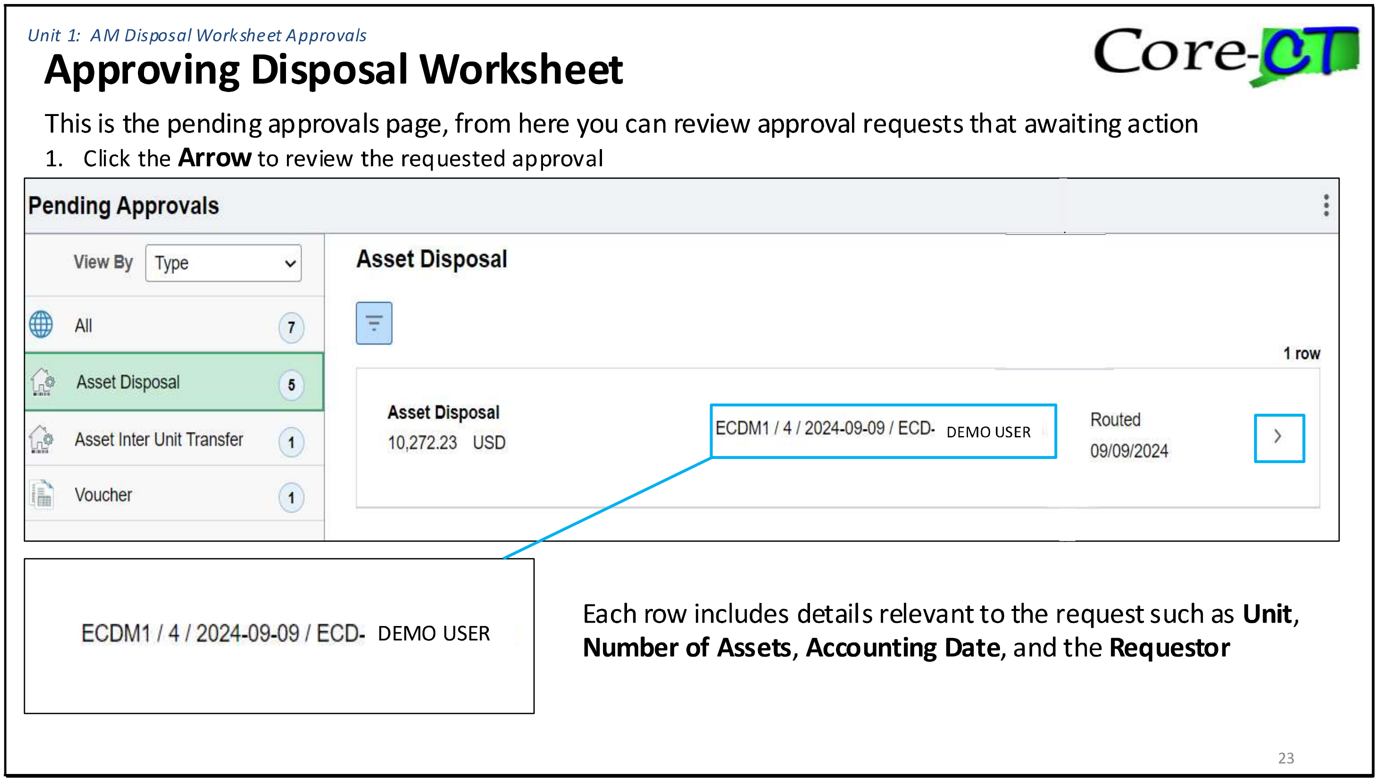
This section is for the Asset Appro**vers** and covers the main *new* portion of this whole process. You can consider this part 2 of 3 for completing disposal transactions.

Once the Appro**vers** know they have a pending request, they have two ways of accessing it.

First though standard fluid tile navigation. Start by selecting Core-CT Financials from the Homepage drop down, followed by the Asset Management Tile which will bring you to the Asset Dashboard. There they can access the Approvals tile. Note that the tile has a number showing the sum of all their pending approvals.

Next, approvers can use the Notifications panel. New requests will be indicated by a green dot next to the Bell Icon. Clicking the bell shows the Notifications panel. Appro**vers** will see all pending Disposal Requests in the Actions tab until they are resolved. These links can also be clicked to instantly bring the Appro**ver** to the Pending Approvals page.



This is the **Pending Approvals Page**. From here, you can review all pending approval requests that are awaiting your action and do so in one place for easy management. You'll also see a side menu where you can quickly focus on the type of requests. Here, you can see we've already selected to view only the Asset Disposals.

Moving on to the data section of the page: The first column includes the type of request. Since we've clicked on Asset Disposals in the menu we're only going see Asset Disposal here. Below that we have a sum cost of all assets submitted in the transaction.

The second column includes additional key transaction information separated by slash marks. We have the Business Unit followed by the count of the assets on the request, the earliest accounting date, and finally the Financial Asset Processor's name who submitted the request. These fields can be used to quickly gauge how much time the request will take to review.

Accounting date is important here as the request needs to be fully completed before that accounting period closes. Remember that this is step two out of three.

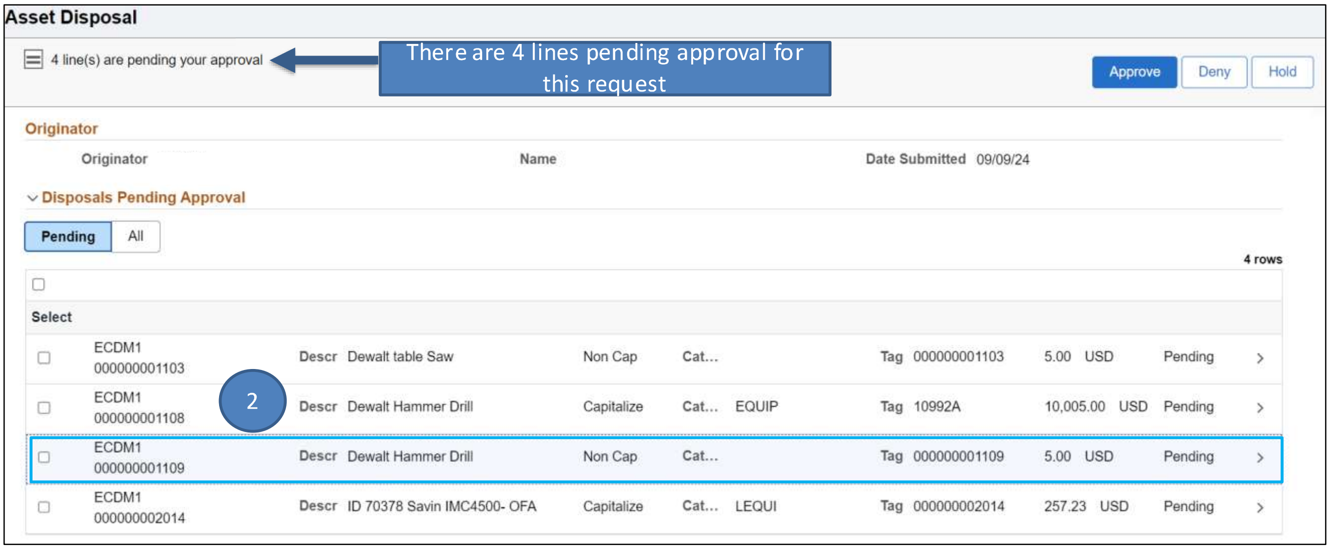
The third column simply gives the date the request was submitted. Click anywhere on the line to continue.

Unit 1: AM Disposal Worksheet Approvals

Approving Disposal Worksheet

This is the **Asset Disposal Header Page.** From here you can approve, deny, or place the request on hold. Additionally, you can click on the arrow for each row to review more details

2. Select a line to review



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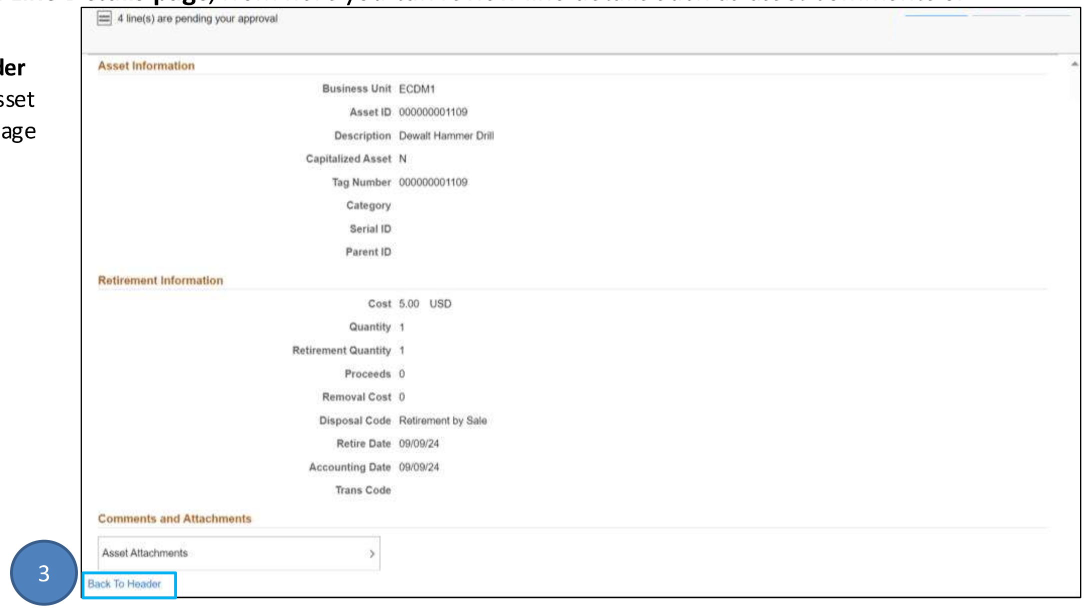
After selecting a request, you'll be brought to the Header page, which is what we see on this slide. Now, disposals are probably the most unique approval request for Core-CT in that they include line level authorization. What that means is individual assets *can* be acted on at different times, not the entire Header.

The Header shows key asset detail like whether they're Capital or Non-capital, and if they are capital it shows their category. The final column also has the approval status of each line. We can click anywhere on any row to proceed to its line level.

Approving Disposal Worksheet

This is the **Approval Line Details page**, from here you can review line details such as asset comments or attachments

3. Click **Back to Header** to return to the Asset Disposal Header page to act



This is the Line Detail page which shows *more* detailed information about the specific asset we clicked into. You'll also find the Asset Attachments box toward the bottom of the page. Appro**vers** will click on this box to review both comments and attachments for the asset. This allows quick access to verify that Disposal Authorization was added by the Financial Asset Processor.

Thoroughly reviewing comments and attachments helps ensure informed decision-making.

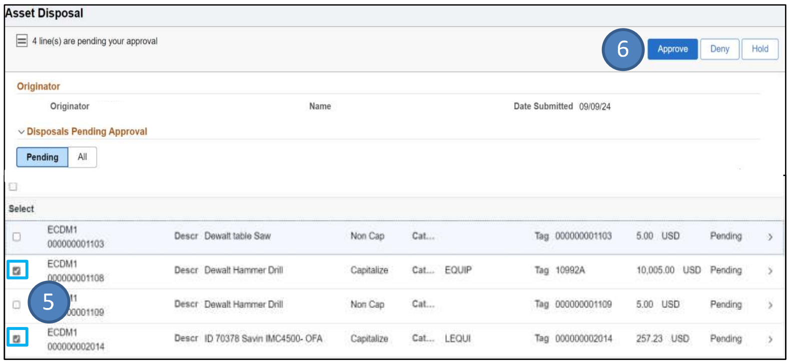
Use this page to gather all necessary information before acting on the approval request.

Once reviewed, click on the Back to Header link and review the other asset lines as necessary.

Approving Disposal Worksheet

From the Header page we can choose to Approve, Deny or Place the request on hold

5. Toggle the checkbox in the Select column for the rows you want to act on
6. Press **Approve**, **Deny**, or **Hold**
7. Press **Submit** (Comments are required when denying or placing a request on hold)



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With the asset details verified the approval request can now be managed back on the **Header Page**. They can Approve, Deny or Hold lines either individually or together.

By image number 5 toward the lower left of the page there are checkboxes for each asset line. Appro**vers** will select the specific checkboxes that they want to take action on proceeded by one of the buttons up by image number 6. They can also use the select all box above the select column to quickly toggle all lines if they will receive the same action.

•If all details of the request are satisfactory, they can Approve and move the transaction onto its final step.

•They can *Deny* lines if anything is incorrect or does not meet disposal requirements. This completely *cancels* the disposal for those selected assets.

•The third choice is to place lines on Hold: This isn't actually a status, but rather it locks the lines down so that no other Appro**ver** may act on them. The line is kept Pending only for this *one* Appro**ver** to Approve or Deny later.

Once an appro**ver** clicks one of the action buttons, an approval *comment* window will pop up. Deny and Hold both *require* comments to be entered, while they are optional for Approve.

Follow your agencies procedures for entering these. The comments are only for the appro**vers**' reference and will not be visible to the Requester.

Click the Submit button to complete processing for the selected lines.

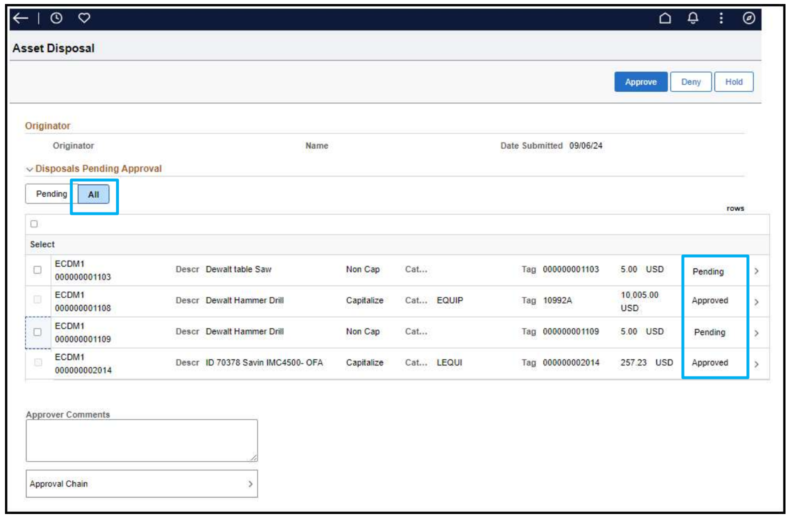
Unit 1: AM Disposal Worksheet Approvals

Approving Disposal Worksheet

Core-CT

- The request will remain on the Approver's pending page until all lines are Approved or Denied

- Use the **All** tab of a Header Page to see the status of all assets on the request.

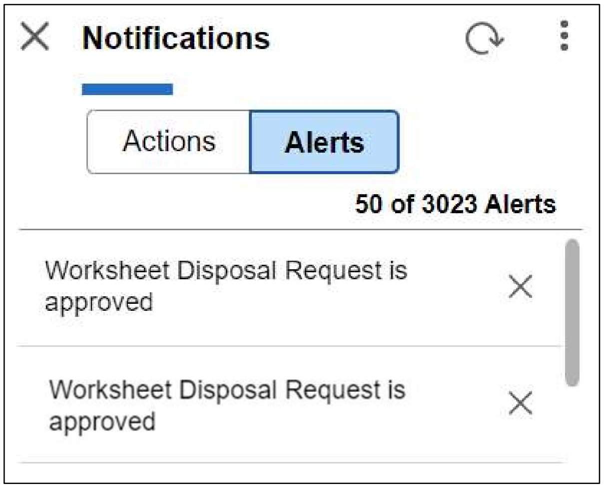


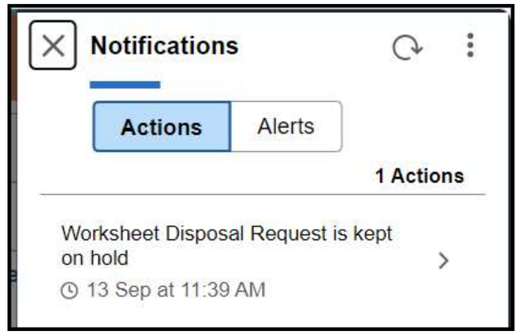
27

If only some lines were processed, the Disposal Transaction will remain on the Pending Approvals page. Appro**vers** can simply return to the Header to take further action on the remaining Pending lines, they can also see the status of previously processed lines by using the **All tab**. Note the previously processed lines have greyed out checkboxes.

Approving Disposal Worksheet

Upon processing the requestor will receive a notification, which will route to the **Alerts tab** indicating that the request has been approved, denied. If the request is placed on hold it will be routed to the Actions tab





Note: Only the most recent action will be active in the notifications tab.

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Once an Approv**er** processes a request, the Financial Asset Processor who submitted it will receive a notification.

- Approved or denied requests will appear on the Alerts tab of the notification panel. These will have to be manually cleared by clicking the 'X' to the right of the notification.
- Holds will appear as an Action for the Financial Asset Processor. This doesn't mean they have any system action to take, but it does let them know that the Approv**er** is locking it down and may require additional detail.

- Actions stay until resolved, however…. disposal notifications as a whole have a caveat. Since notifications are at the header level and not the line level, each full request can only have one notification. Only the most recent approval action taken for an entire request will appear as a notification. Because of this, we recommend if holding lines do so last.

Approving Disposal Worksheet

Upon processing the Financial Asset Processor will also receive an email that will list the most recent status of all assets in the 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

29

The requesting Financial Asset Processor will also receive an email with every action the Appro**ver** takes. These emails include a comprehensive list of the most recent approval statuses for all assets in the request. It will be a vital tool for the Financial Asset Processors as they don't have access to the Approval pages.

Here you can see a list of all approved, denied, and still pending assets for the one transaction.

That's a run-down of the Appro**ver**'s portion of this process. Disclaimer that the assets are not yet disposed, though. First, we'd like to take another pause to address any new chat questions.

(Wait)

Scenario 3: Review and Load Into AM

In this scenario, you'll be shown a walkthrough on how to execute a load into AM

What we will accomplish:

- AM Fluid Navigation
- Executing a Load Into AM
  - Validating Asset Status

30

So, like we touched on before, Disposal Worksheet Approvals are really a three-step process. Submit, Approve, and *Load*. Just like previously, submitting Disposal Worksheets doesn't immediately transact the asset retirements. Instead, they create Interface Transactions that the asset team reviews and the Asset Processor Loads.

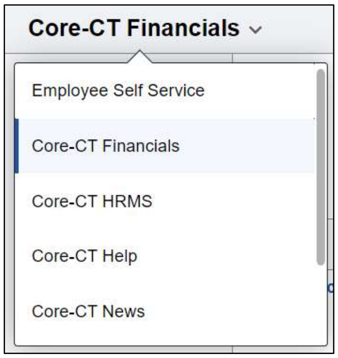
As you know, only users with the Asset Processor role can Load Asset Interfaces. Some of you Appro**vers** might also be Asset Processors, but we didn't include users with the role itself in this training because loading interfaces is a daily task for them. We're still including it for the Appro**vers** benefit and as it's the final step of the disposal transaction.

The goal is to get you familiar with understanding pending interfaces.

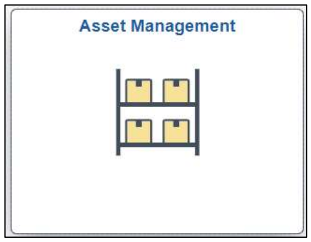
Reviewing AM Transactions

Role: All Asset Roles

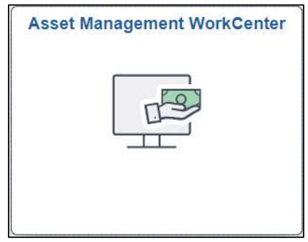
Navigation: Core-CT Financials > Asset Management> Asset Management WorkCenter > Load Transaction into AM



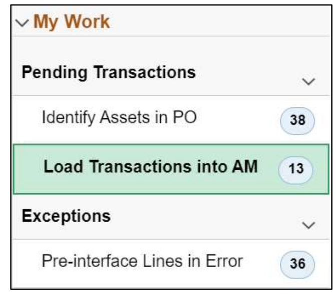
Core-CT Financials



Asset Management Tile



AM WorkCenter Tile



AM WorkCenter:
Load Transaction into AM

31

Reminder that anyone with an asset role can review pending Interface Transactions for their Business Units on the Asset WorkCenter. You just have to make sure you have your WorkCenter filters setup, which we have a job aid posted for and should take a minute or two to do.

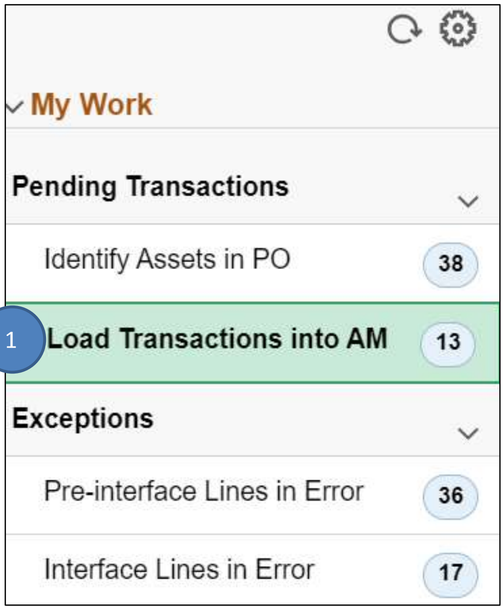
We'll start off by covering the Fluid Navigation again. Once logged in, we'll select Core-CT Financials from the Homepage dropdown, then select the Asset Management Tile followed by the Asset Management WorkCenter Tile.

Finally, we'll click the Load Transactions into AM link from the side menu.

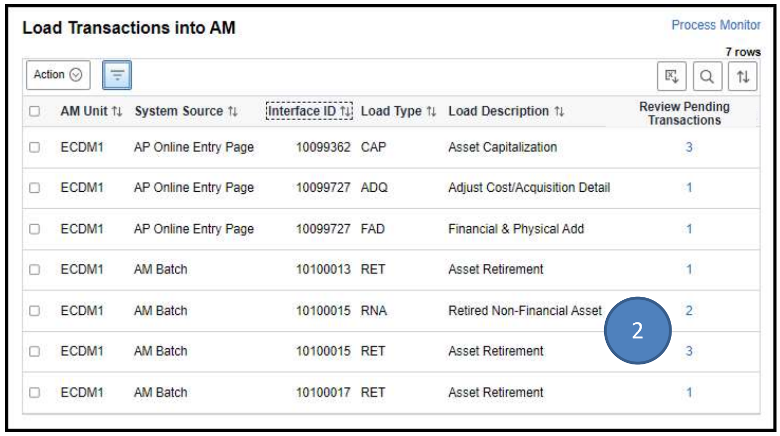
Unit 1: AM Disposal Worksheet Approvals

Reviewing AM Transactions

To review a transaction, navigate to the **Pending Transactions** tab accessible from the navigation collection



1. Press **Load Transactions into AM**
2. Select a row, and access the link in the **Review Pending Transactions** column i.e., **3** – This number shows the number of pending transactions ready for review for this



Load Transactions into AM

Process Monitor

7 rows

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

32

For people who are new to Asset management – again the Load Transactions link is on the left menu under the My Work and Pending Transactions section.

The image to the right shows what the page typically looks like and we'll briefly cover some aspects of it now, especially since its look has changed a bit. You have rows separated out by Business Unit, Interface ID and Load Type. Transactions come from several modules or system sources, which are indicated in that second column.

What's new in this upgrade is that right-most column: Review Pending Transactions. The numbers represent the number of transaction lines, and the numbers themselves are also hyperlinks that will take you to review its information. Reviewing used to be a dropdown on the left. There's also the Action button toward the top left – this will only appear for Asset Processors.

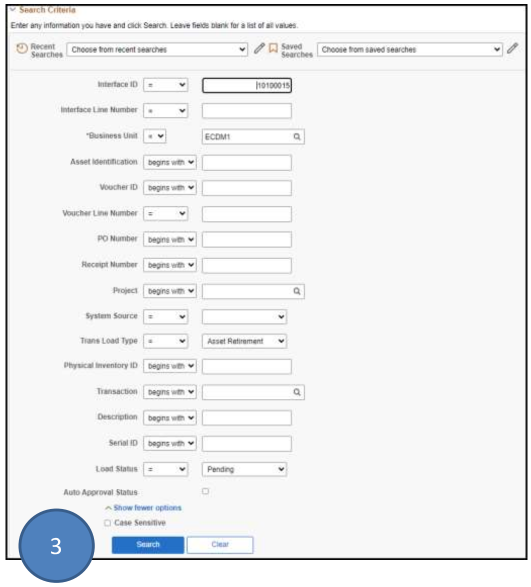
So, we're looking for Retirement Interfaces, and because there are two types of assets, Capital and Non-Capital, we have two different Retirement Transaction Types: RET and RNA respectively. Now I want to draw your attention to that big number two image and the two lines it covers. We see both of these Load Types here, and that they have the same Interface ID. This is the interface for the transaction we just approved. We can click into the right columns 2 or 3 to review it.

Reviewing AM Transactions

This is the **Review Transaction Search Page.** From here you can search for transactions pending review

The search criteria auto populates from the transaction details which was inputted on the previous page.

3. Click **Search**



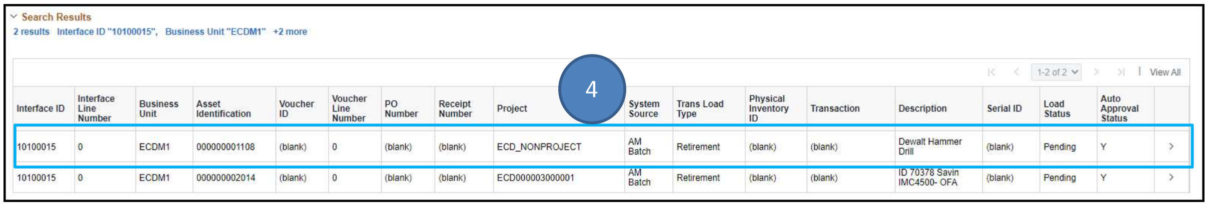
33

A pop-up appears with pre-populated search criteria. All you should have to do is press the Search button

Reviewing AM Transactions

After clicking search the pending transactions will display in the results window.

4. Select anywhere on the line to review a lines transaction data (next page)



Search Results

2 results Interface ID "10100015", Business Unit "ECDM1" +2 more

1-2 of 2 View All

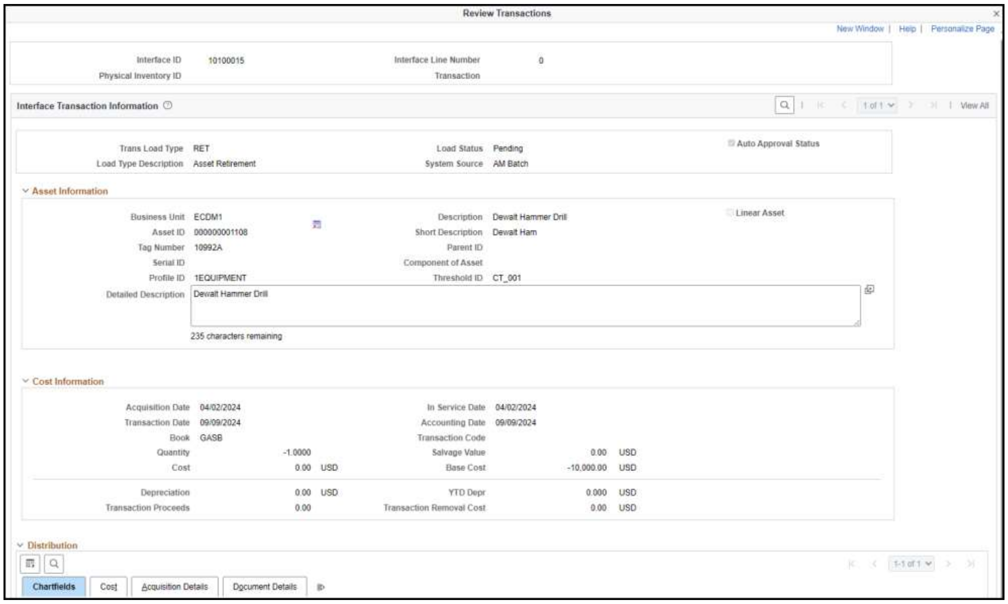
Interface ID	Interface Line Number	Business Unit	Asset Identification	Voucher ID	Voucher Line Number	PO Number	Receipt Number	Project	System Source	Trans Load Type	Physical Inventory ID	Transaction	Description	Serial ID	Load Status	Auto Approval Status	
10100015	0	ECDM1	000000001108	(blank)	0	(blank)	(blank)	ECD_NONPROJECT	AM Batch	Retirement	(blank)	(blank)	Dewalt Hammer Drill	(blank)	Pending	Y	>
10100015	0	ECDM1	000000002014	(blank)	0	(blank)	(blank)	ECD000003000001	AM Batch	Retirement	(blank)	(blank)	ID 70378 Savin IMC4500- OFA	(blank)	Pending	Y	>

And the transaction lines appear below the criteria. We can click anywhere on the line to proceed to the review page.

Unit 1: AM Disposal Worksheet Approvals

Reviewing AM Transactions

We can review Transaction and Asset Detail



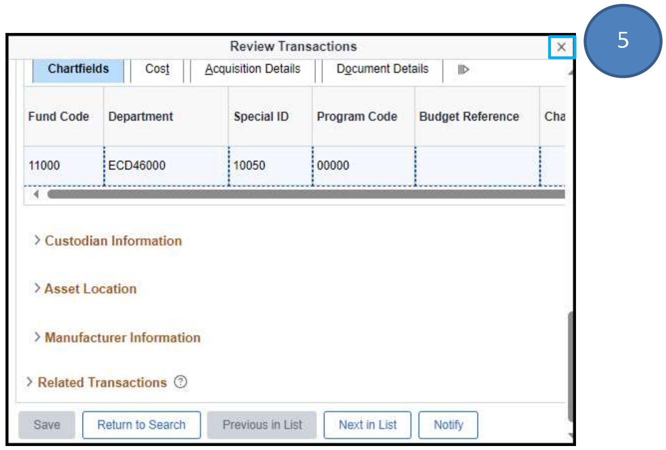
35

And here we have access to asset and transaction detail for review. A functionally important field here is the Accounting Date, these transactions must be loaded within the current open period, which is why this date matters.

Unit 1: AM Disposal Worksheet Approvals

Reviewing AM Transactions

5. To close the review transaction window press the **X**



36

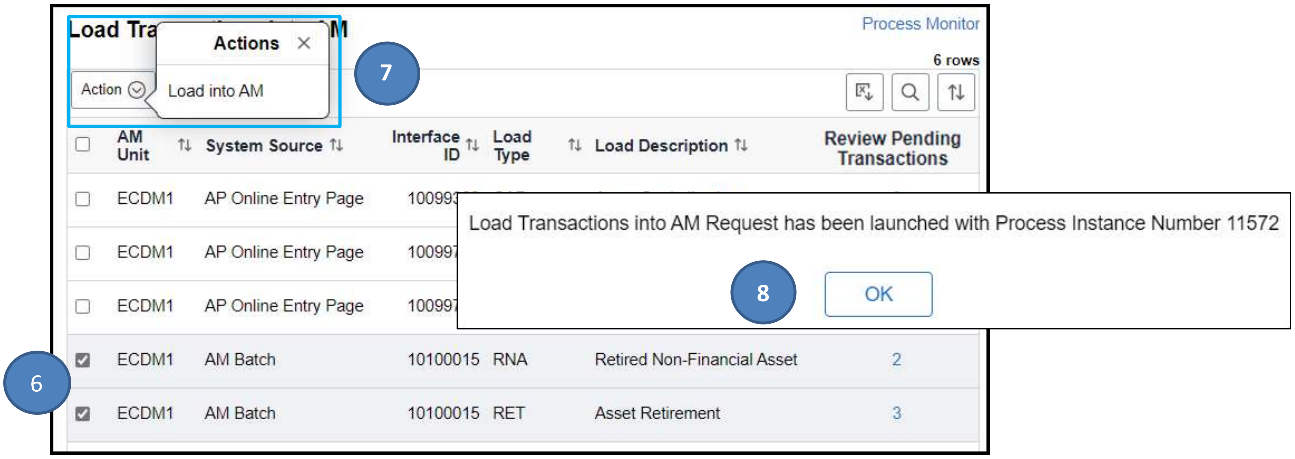
You can continue to review additional information on this page, or you can use the Next and Previous in List buttons towards the bottom of the page to review the other interface lines. Once review is complete, click the X at the top of the window to close the review pop-up.

Load Transaction into AM

Role: Asset Processor

After reviewing the transaction details return to this page to load a transaction into AM

6. Select your **Transaction**
7. Access the **Action** drop down, and press **Load into AM** (A popup box will open)
8. Press **OK**, your transaction is now processing

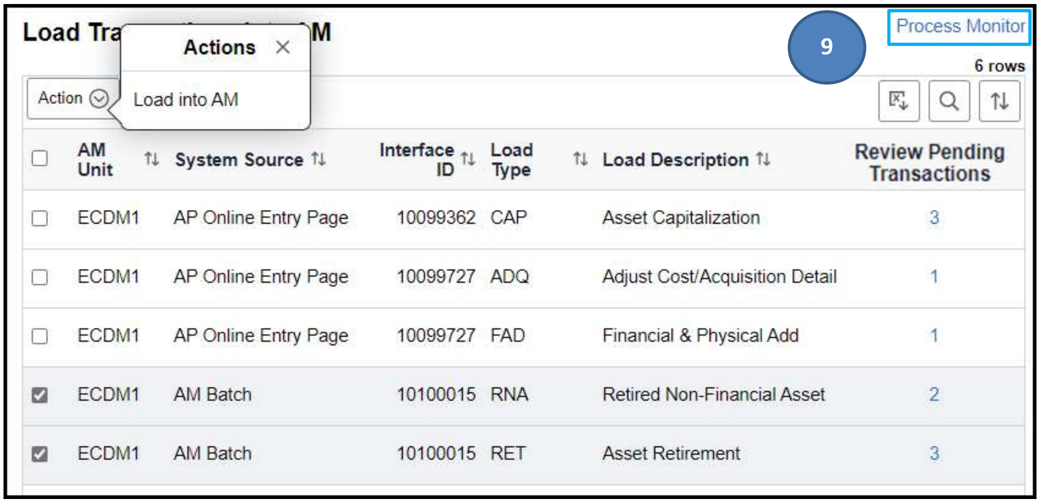


So, only the Asset Processor can Load Interfaces, and this is one of their main daily duties. With interface review done, they select the transaction lines followed by the Action button and finally click the Load into AM action. A message confirming the process has launched should appear that they can simply click OK and proceed.

Load Transaction into AM

The selected transaction has been loaded into AM

9. Select **Process Monitor**



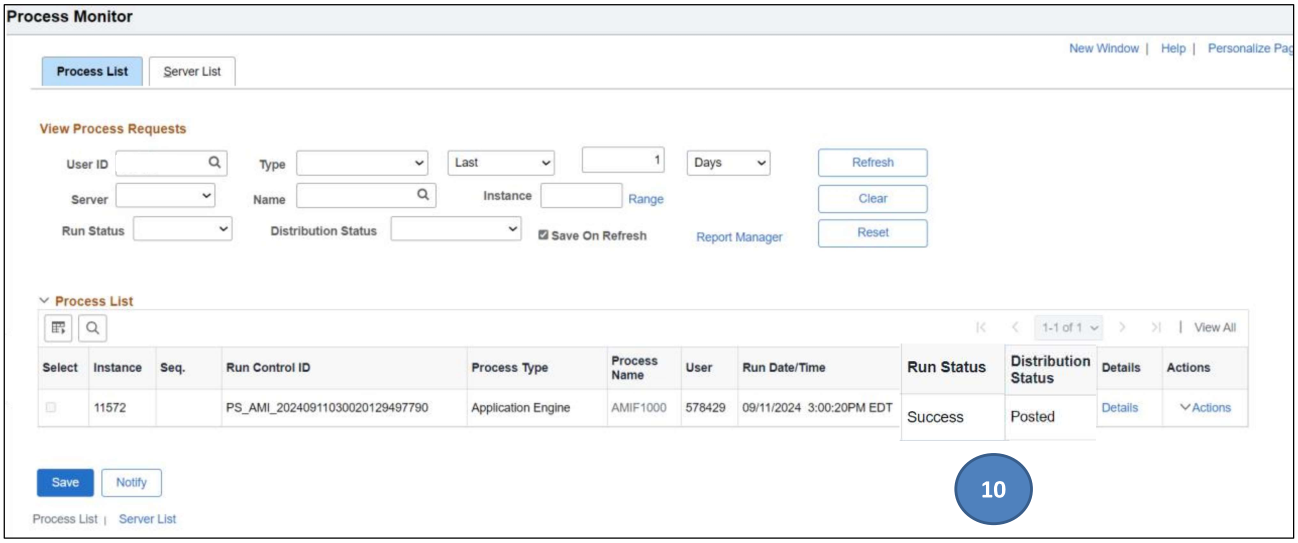
38

Now, as whenever running a system process, we will visit the **Process Monitor** to ensure the load completes successfully. A new link has been added to the top of the Load transactions into AM page for quick access.

Load Transaction into AM

This is the Process Monitor page from here you can review the status of the process run i.e., Load Transaction into AM, once the process shows success the status of the asset changes.

10. Verify **Run Status** shows **Success** and **Posted**



This is the Process Monitor page. We simply click the Refresh button until the Run and Distribution Statuses change to Success and Posted. Any errors should be reported via Footprints

And that's it! Step 3 of 3 is completed and the disposals should be transacted. We'll cover confirming that fact in just a minute, but we'll stop to see if we've got anything from the chat.

(Wait)

Scenario 4: Validating Asset Disposed Status

In this scenario, you'll be shown a walkthrough on how to Validate an assets disposal

What we will accomplish:

- AM Approvals Fluid Navigation
- Validating Asset Status

40

Now we'll verify the assets have been disposed. There's a few places we can, but the best page to do so is the Review Cost page. Its good practice to visit this page after *any* asset transaction.

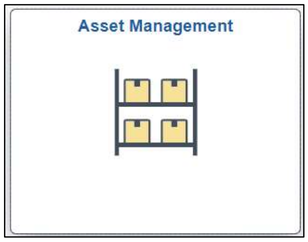
Our goal here is to help you confidently look up an asset's current status.

Validate Asset Status

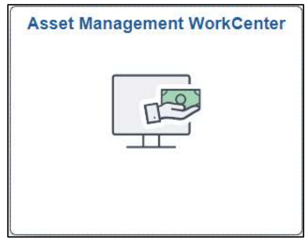
Role: All Asset Roles

Navigation: Core-CT Financials > Asset Management and Tracking > Asset Management Work Center > Review Cost

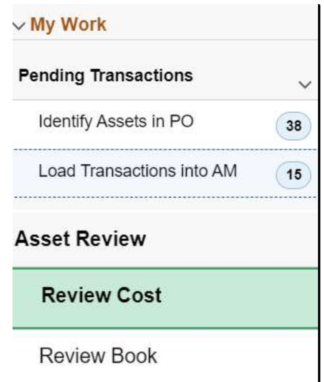
Core-CT Financials



Asset Management Tile



AM WorkCenter Tile



AM WorkCenter: Review Cost

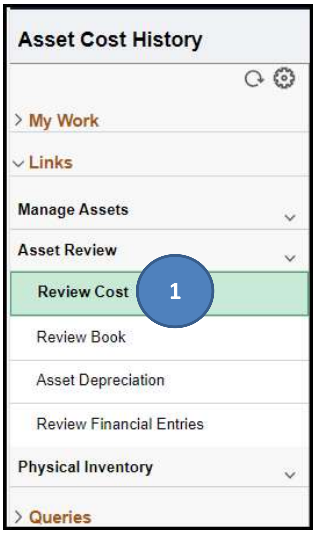
41

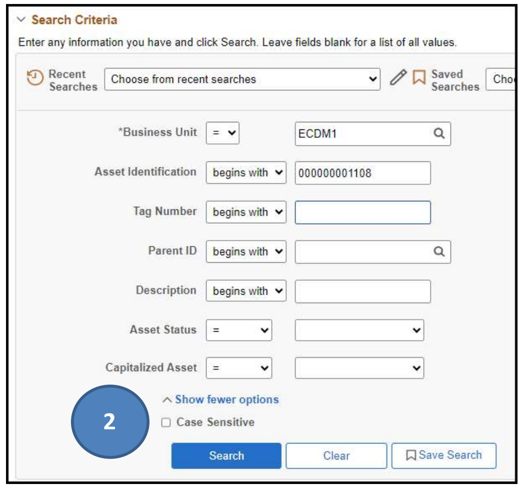
Here's the Fluid Navigation – hopefully this is already becoming familiar to you just within this presentation. This process is also accessible for all asset role users. Select Core-CT Financials from the Homepage drop-down, then the Asset Management Tile, and the AMWorkCenter tile. Once on the WorkCenter we'll look for the Review Cost page link from the left menu.

Validate Asset Status

To validate asset status, navigate to the **Asset Management WorkCenter**

1. Select **Review Costs**
2. Fill in search Criteria i.e., Asset Identification and Press **Search**





In Review Cost we'll put in some search criteria for the assets we just disposed and click the Search button. Don't forget you can include ranges here if your assets are sequential in either Asset ID or Tag Number, which will allow even faster navigation between assets on the next pages. Pretend we removed that 8 at the end of the Asset ID for the next page.

Validate Asset Status

After clicking search, the applicable assets will display in the results window.

3. Identify the asset and click anywhere on its line to proceed

Search Results

9 results Business Unit "ECDM1", Asset Identification "00000000110"

1-9 of 9 | View All

Business Unit	Asset Identification	Tag Number	Parent ID	Description	Asset Status	Capitalized Asset	
ECDM1	000000001101	00000001	(blank)	Test Asset	Received	Non Cap	>
ECDM1	000000001102	00000002	(blank)	Test Asset	Received	Non Cap	>
ECDM1	000000001103	000000001103	(blank)	Dewalt table Saw	Disposed	Non Cap	>
ECDM1	000000001104	000000001104	(blank)	Dewalt Sawsall	In Service	Non Cap	>
ECDM1	000000001105	000000001105	(blank)	Test Asset Script 10.6.92	In Service	Capitalize	>
ECDM1	000000001106	000000001106	(blank)	Test Asset	In Service	Non Cap	>
ECDM1	000000001107	000000001107	(blank)	Test Asset	In Service	Non Cap	>
ECDM1	000000001108	10992A	3	Dewalt Hammer Drill	Disposed	Capitalize	>
ECDM1	000000001109	000000001109	(blank)	Dewalt Hammer Drill	Disposed	Non Cap	>

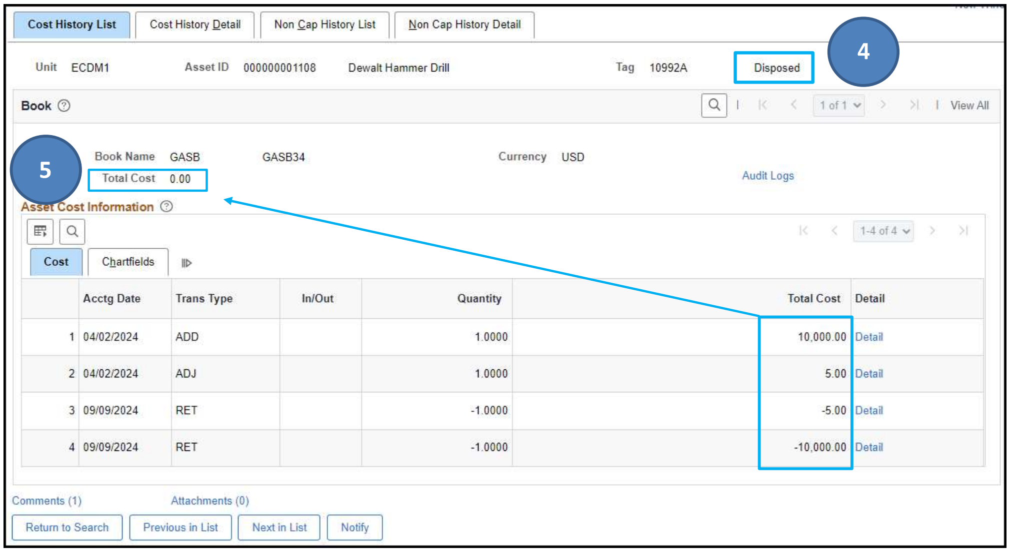
43

Scroll down to the search results and look for the desired asset. We can click anywhere on this line to proceed to its cost page, but we do want to point out you can also review its status right here in the search results.

Validate Asset Status

This is the **Cost History List** from here you can confirm the asset status

4. Verify **Disposed**
5. For Capital Assets, Verify **Total Cost** is zeroed out



44

And here we have the Capital asset's cost summary. We can verify the status of the asset as disposed at the top right of the screen.

Now, we know that this is a capital asset - they receive transactions when they're retired. Our total cost should be zero for disposed capital assets, which we can see by image number 5. Note that this is not the same for Non-capital assets as they don't get these balancing rows when they're retired.

That's a complete run down of the new disposal approval process. We'll stop to review questions at this time.

(Pause)

Alright, Scott – back too you!

>>Scott : Thank you, Juan, for covering the first unit. We'll now move onto Unit two.

Unit II: Interunit Transfer AM Approvals

When do we use AM Approvals?

All Interunit Transfers of capital assets will now route for approval. Asset Approvers can approve or deny IUT requests.

The **Asset Management** tile can be accessed from the **Core-CT Financials Dashboard**. From there we will use both the **Asset Management WorkCenter** tile, the **Approvals** tile, or the **Navbar**. Additionally, approvers can access the **Notification Icon** to access the **Notification Panel** to mange AM approvals

Moving onto Unit two – Interunit Transfers. These transactions move capital assets from one BU to another and are very typical for Financial Asset Processors. They will continue to transact these and will do so on the same page they've been using.

The main difference now that we're requiring approvals is that they don't process *instantly* when their transaction page is saved. Instead, they will route for approval, just like with the Disposal Worksheet transactions.

*Un*like the Disposal Worksheets, there is no interface step; the transactions process upon approval. Which of course is where the Asset Appro**vers** come in, and they'll use the same navigation methods we've already covered to manage requests.

Scenario 5: Submitting InterUnit Transfers

In this scenario, you'll be shown a walkthrough on how to Submit and Approve IUT requests

What we will accomplish:

- AM Approvals Fluid Navigation
- Submitting IUTs

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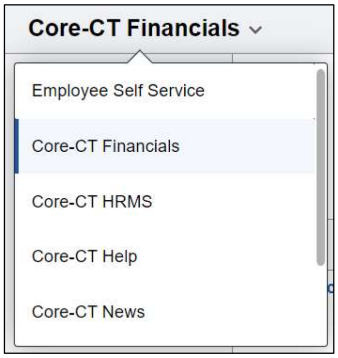
Here we'll begin with Scenario 5 – submitting IUTs. We'll cover navigation again, and Appro**vers** will be going to the same Pending Approvals page as we visited previously. IUT Transactions are still submitted on the Asset WorkCenter.

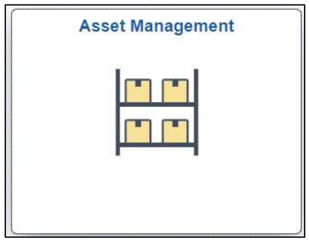
We hope that by the end of this section, Financial Asset Processors will feel comfortable sending these IUT requests effectively within the system.

Submitting Interunit Transfers

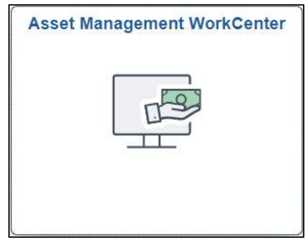
Role: Financial Asset Processors
Navigation: Core-CT Financials Asset Management > Asset Management WorkCenter > Cost Adjust/Transfer Asset



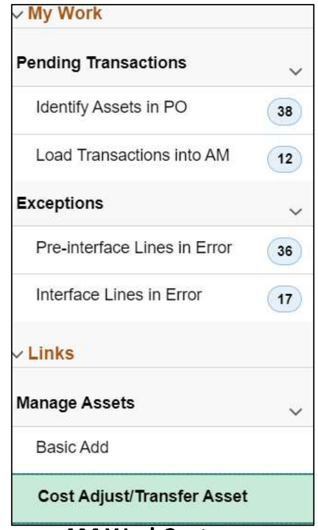
Core-CT Financials



Asset Management Tile



AM WorkCenter Tile



AM WorkCenter:
Cost Adjust/ Transfer Asset

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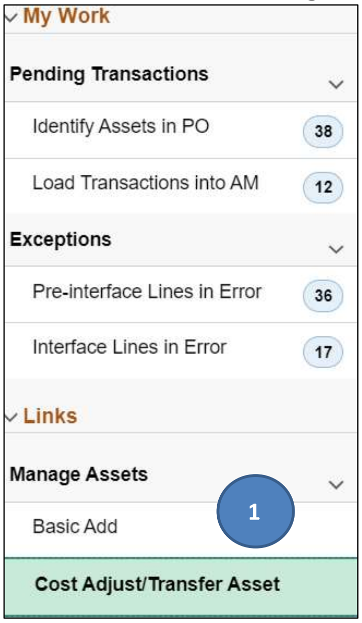
Financial Asset Processors should be familiar with the page, but we'll go over the new navigation. From the homepage dropdown > Core-CT Financials > Asset Management tile > Asset Management WorkCenter tile to be brought to our main page for managing assets. Therein, we're going to choose the Cost Adjust/Transfer Asset page.

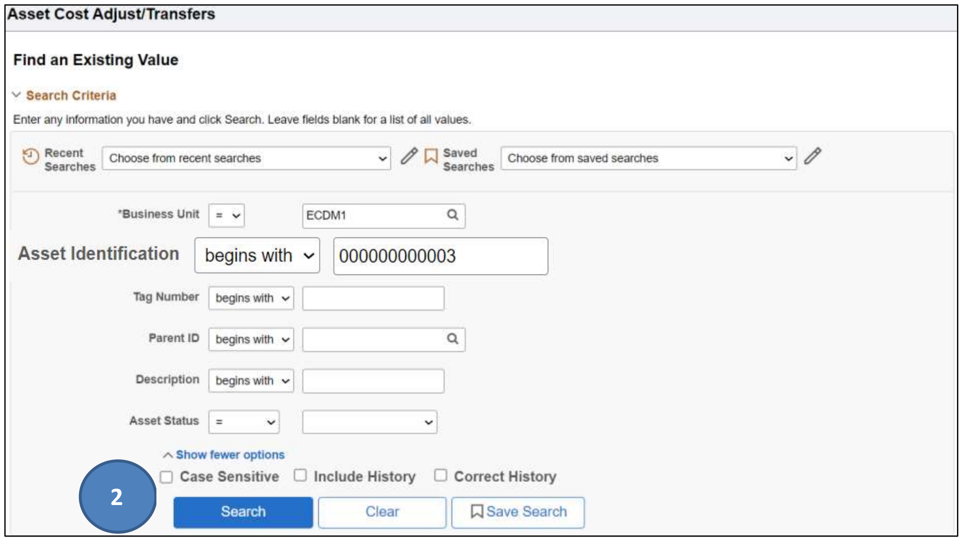
Only Financial Asset Processors can utilize this page.

Submitting IUTs

To transfer an asset, navigate to the **Manage Assets** tab accessible from the AM WorkCenter



1. Select **Cost Adjust/Transfer Asset**
2. Fill in search Criteria i.e., Asset Identification and Press **Search**



48

Here we have the Search Criteria page where we'll input the asset that we want to be transferred and click Search. We can only these one asset at a time, but you can choose to search for a range of assets if you have more than one.

Submitting IUTs

After clicking search, the applicable asset will display in the results window. (ensure the asset status is In Service)

3. Select anywhere on an asset's line to proceed to the transaction page

Search Results

1 result Business Unit "ECDM1", Asset Identification "000000000003"

1-1 of 1 | View All

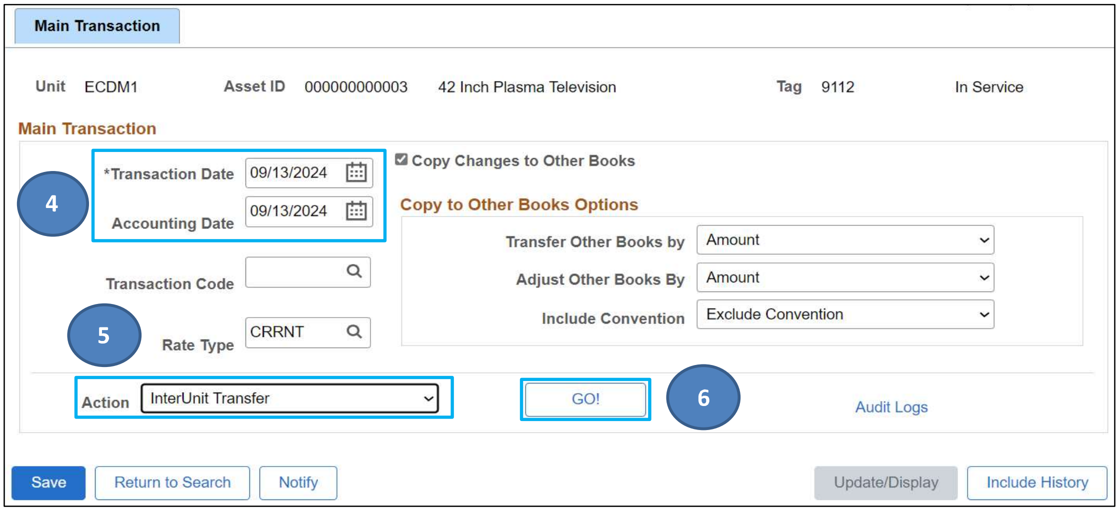
Business Unit	Asset Identification	Tag Number	Parent ID	Description	Asset Status	3
ECDM1	000000000003	9112	(blank)	42 Inch Plasma Television	In Service	>

After clicking search the results will appear below. Select anywhere on the line to proceed to the transaction page.

Submitting IUTs

This is the **Main Transaction Tab**, from here you can initiate the asset transfer

4. Set **Transaction** and **Accounting Date**
5. From Action drop-down menu select **InterUnit Transfer**
6. Press **Go**



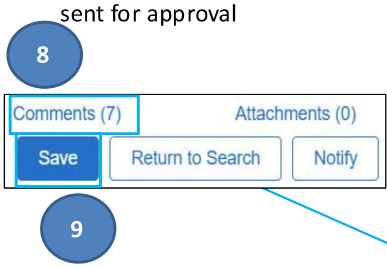
On the transaction page we're going to start off only seeing one tab. Here you would enter the date the asset was physically given to the other Business Unit as the Transaction Date. You must choose a date in the open currently open period for the Accounting Date.

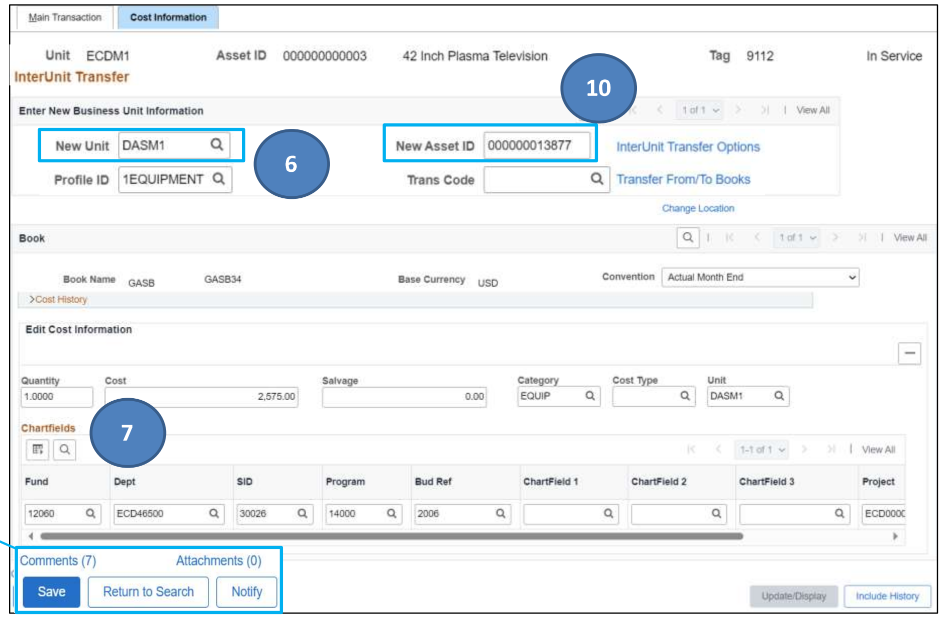
We'll look down to point 5 and the action box. Click the drop down and choose InterUnit Transfer. With all that transactional data entered, we can click the Go button.

Submitting IUTs

After clicking go you will now be on the **Cost Information Tab,** From here you will finalize your submission

6. Enter the **New Unit**
7. Enter new Chartfields (refer to CO-64)
8. Access the **Comments** link to add Disposal Authorization
9. Hit **Save**
10. On Save, the new Asset ID is assigned, and the request is sent for approval





The Cost Information tab will appear, which is the page we use to put in the asset's new Business Unit information. You'll enter the New Business Unit itself by image number 6, and its new chartfields down by image 7. If the new BU has an assigned asset ID you can enter it too, though heavily recommend keeping it defaulted to NEXT.

A new enhancement to this page is quick access to the asset Comments and Attachments, which we have expanded by image number 8. Here you should click into the comments link to enter your Disposal Authorization as new comment line just like we did on the Disposal Worksheet. You can even conveniently attach the CO-64 now using the attachments link right here. That's just our suggestion, but the Disposal Authorization is a requirement.

After all new BU and disposal information has been added to the page, we are clear to click save. A green 'saving' banner will appear until the save completes, and once it does the asset ID will populate. This used to be the end of the transaction, but now it will route for approval.

Submitting IUTs

Upon submitting an InterUnit Transfer, the approver receives an email for the pending request

Asset IUT Approved

Demo.Requester@ct.gov
To Demo.Approver@ct.gov

8:30 AM

Asset InterUnit Transfer request is approved.

DATE_SUBMITTED: 2024-09-06
DTTM_STAMP: 2024-09-06-03.27.45.000000
ORIGINATOR_ID: Demo Requester

FROM BUSINESS UNIT: ECDM1
FROM ASSET ID: 000000000003
FROM TAG: 9112

TO BUSINESS UNIT: DASM1
TO ASSET ID: 000000013877

Once the interunit transfer request is submitted, the Appro**ver** will receive an email notification This email indicates that there is a pending request awaiting approval. Included is the main relevant information – the from/to Business units and the from/to Asset IDs, along with the name of the Financial Asset Processor who sent the request.

Appro**vers** will also receive a notification in Core-CT that we'll cover in just a few moments.

That's its for submitting an Inter-Unit Transfer request. Exactly the same process for transacting that Financial Asset Processors are used to, except now we have the comments and attachments page enhancement and the fact that the transfer doesn't process immediately upon page save. Before we switch gears back to the Appro**ver**'s process – do we have any chat questions?

Core-CT

Scenario 5: Approving InterUnit Transfers

In this scenario, you'll be shown a walkthrough on how to Submit and Approve IUT requests

What we will accomplish:

- AM Approvals Fluid Navigation
- Approving/Denying IUTs

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So, approving InterUnit Transfer requests. We'll go over the information that you receive, fluid navigation, and how to take action on your pending requests.

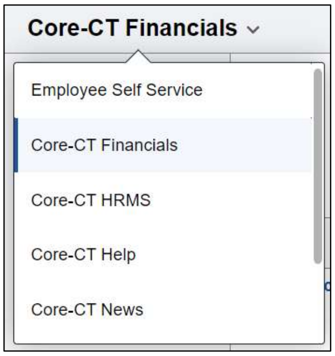
These are a little bit simpler in that you can only approve or deny InterUnit Transfers. There's no holding.

Our objective is that you'll be equipped to manage capital interunit transfer approvals effectively within the system.

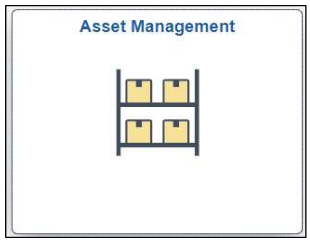
Approving IUTs

Role: Asset Approver

Navigation: Core-CT Financials > Asset Management> Approvals Tile *or* Notifications Icon > Notifications Panel

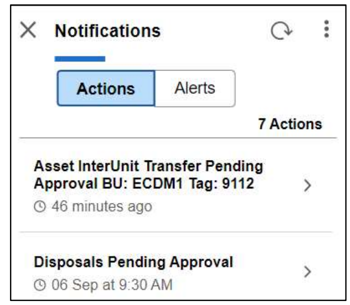


Core-CT Financials



Asset Management Tile

Approvals Tile



Approvals Panel

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Again, this scenario is geared toward Asset Appro**vers** who will be receiving these InterUnit Transfer requests. Exactly like Disposal worksheets we have a few options on how to navigate there.

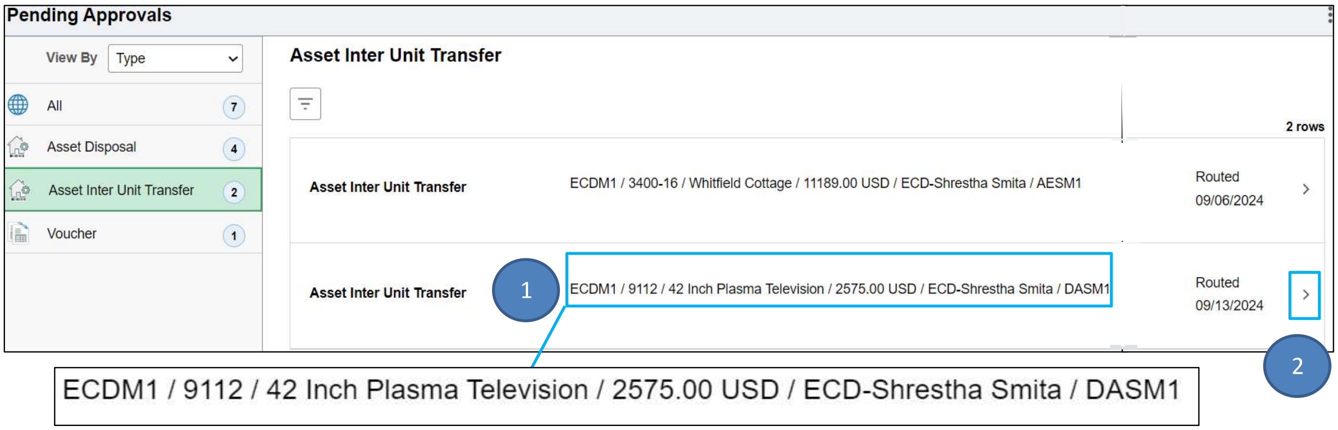
We can use tile navigation. From any homepage we can use the homepage dropdown to select Core-CT Financails. We'll then proceed to the through the Asset Management Tile to be taken to the AM Dashboard. From there, the first tile on the page will be Approvals.

Appro**vers** also receive a new Actions type notification when an IUT is routed to them. Because these requests are only for single asset, the header information can be displayed right on these notifications, so we can see the From BU and the asset's tag number. This notification is also a hyperlink to the Pending Approvals page.

Approving IUTs

This is the pending approvals page, from here you can review approval requests that awaiting action

1. Each row includes details relevant to the request such as **Originating BU**, **Tag of Asset**, **Description of Asset, Cost of Transferred Asset, Requesting Financial Asset Processor** and the **Destination BU**
2. Click the **Arrow** to review the requested approval



After navigating, we can see the Pending Approvals page again. You can see we've used the side menu to focus in on just the pending Asset Inter Unit Transfer requests.

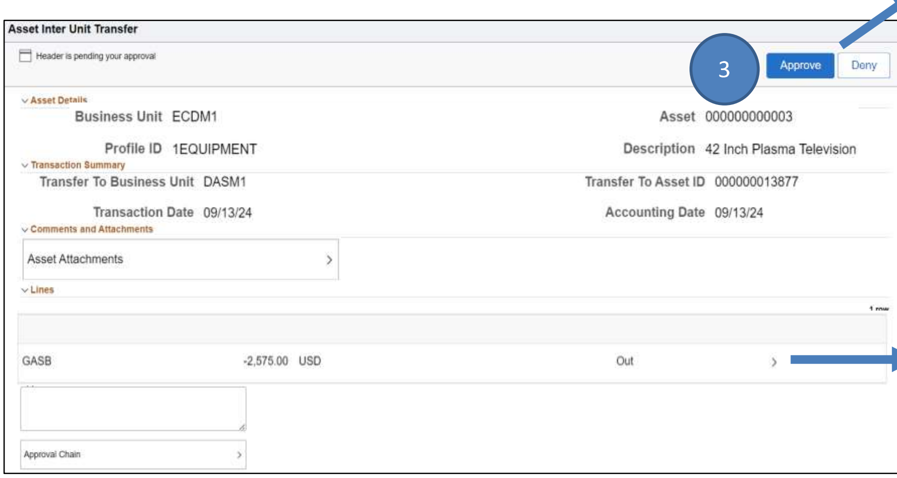
The first column again lists the type of transaction we're looking at. The middle column includes a number of key transaction details separated by slashes to help the Appro**ver** quickly identify the transaction. We have the From Business Unit, the From Asset ID, the asset description, the asset's total capital cost, the name of the Financial Asset Processor that submitted this request, and finally the New or To Business Unit. In the third column we have the date the request was routed.

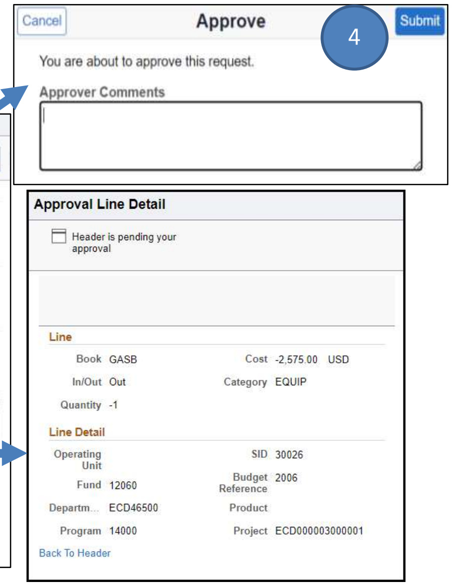
We've highlighted the arrow at image number 2 to proceed here, but you can click anywhere on the line to proceed to the Appro**ver** Header page.

Approving IUTs

This is the **Asset IUT Header Page.** From here you can approve or deny. Additionally, you can click on the Asset Attachments or Approval Chain to review more details

3. Press Approve or Deny
4. Press Submit (Comments are required when denying IUT requests)





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This slide shows two different pages: both the header and line level. With the header being on the left of the screen. It contains the key information the Approv**er** should review, including Asset ID, Accounting date, what business unit its being transferred to and what its new Asset ID will be. They also have quick access to the Asset Attachments button there where they can review Disposal Authorization and other comments history.

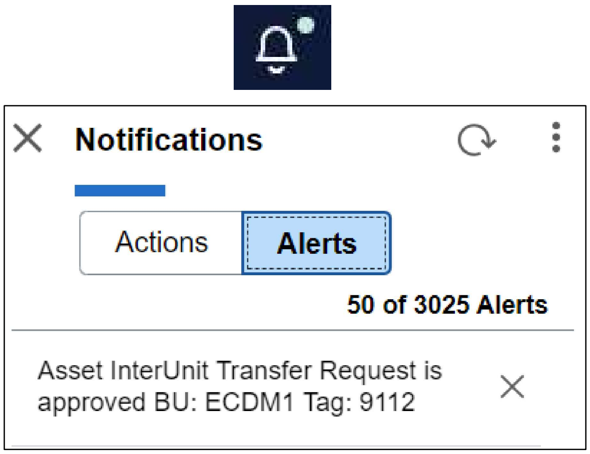
The line details page simply shows the from Business Unit's Chartfield information.

After reviewing necessary details, the appro**ver** will simply click approve or deny here on the header. Again, an approval comments box will appear – optional for approved; required for denied; follow your agency's procedures. These approval comments do not get seen by the requester.

Finally, click the Submit button on that window to finalize both the approval and the transaction as a whole; the asset is now inactive in the original Business Unit and In Service in the new Business Unit. IUTs don't have the interface step.

Approving IUTs

Upon processing the requesting Financial Asset Processor will receive a notification, which will route to the **Alerts tab** indicating that the request has been either approved or denied.
They'll also receive an email.



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Once action is taken by the Appro**ver**, the Financial Asset Processor will receive an Alert Notification in the system. These alerts *do* include the original BU and Asset Tag number since they are header level requests. Users will have to click the X to clear these notifications.

They will also receive an email with the from/to asset IDs.

Approver's task is complete now, and the Financial Asset Processor has been notified. Are there any questions for approving IUTs?

Core-CT

Scenario 7: Validating Asset Transfer to Another BU

In this scenario, you'll be shown a walkthrough on how to Validate an asset's transfer to a new business unit

What we will accomplish:

- AM Approvals Fluid Navigation
- Validating Asset Status
    - Transfer to another BU

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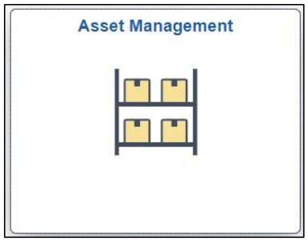
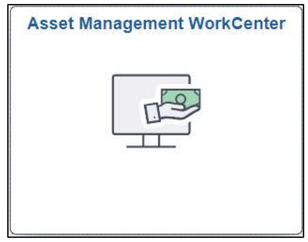
We've reached out final scenario. Verifying the asset was transferred by checking its status. Again, the most succinct place to achieve this is on the Review Cost page, and we'll cover how to get there. By the end of this we hope you'll have confidence checking the status of your asset InterUnit Transfers.

Validate Asset Status

Role: All Asset Users
Navigation: Core-CT Financials > Asset Management and Tracking > Asset Management Work Center > Review Cost



Asset Management Tile



AM WorkCenter Tile

AM WorkCenter: Review Cost

Core-CT Financials

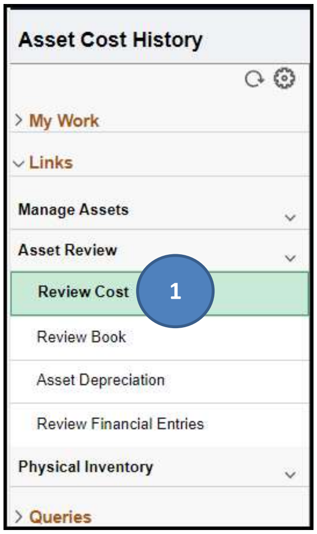
All asset users can check the status of assets it your business units.

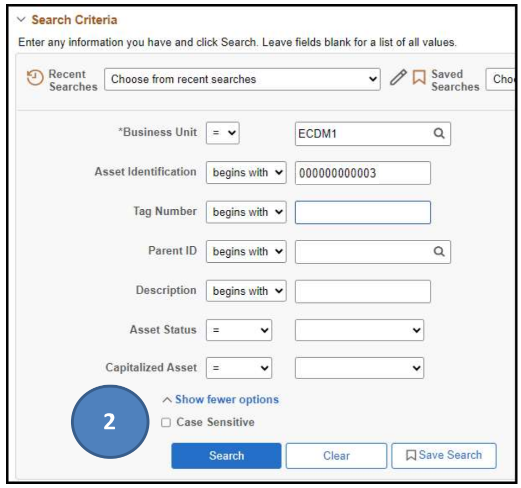
This is the last time we're covering navigation in this session. I trust you can do it blind-folded at this point. After logging in, we'll select Core-CT Financials from the Homepage drop down. Look through the financial modules and select the Asset Management Tile. From there we'll click on the AM WorkCenter Tile. On the WorkCenter we can find the Review Cost page under the Links > Asset Review section.

Validate Asset Status

To validate asset status, navigate to the **Asset Management WorkCenter**

1. Select **Review Costs**
2. Fill in search Criteria i.e., Asset Identification and Press **Search**



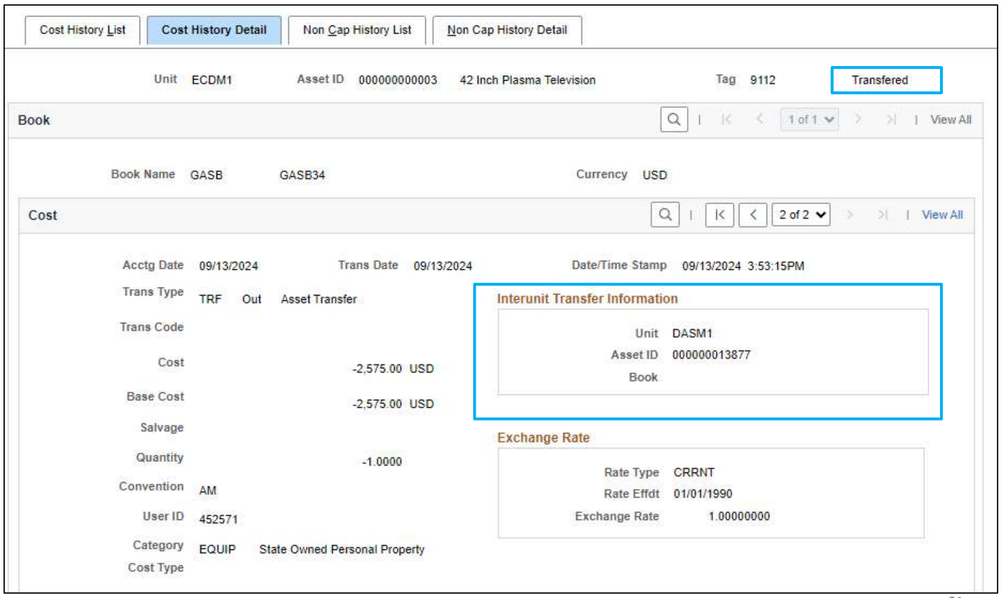


We'll put in our asset criteria on the search page and click the search button, then we'll select the desired asset from the returned rows.

Validate Asset Status

To validate asset status, navigate to the **Cost History Detail** tab

1. Verify status updated to **Transferred**
2. Verify InterUnit Transfer Information accuracy



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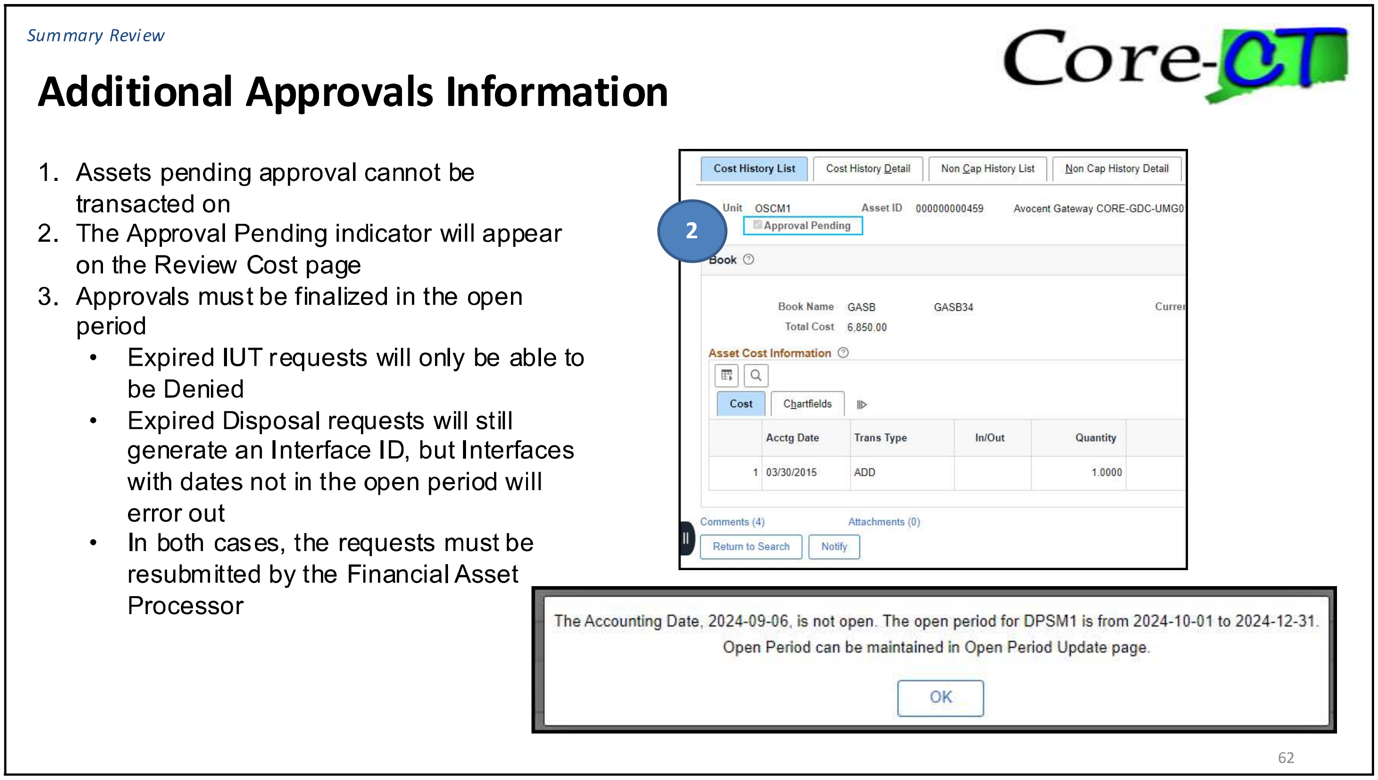
And we're brought to the asset's Cost History page. At the top right you can see the asset does have Transferred status as expected.

We've also clicked on the 2nd tab which is the Capital Cost Detail, and we've gone the last transaction, which is this case is row 2 of 2. This is because we have a useful section on this page: the Interunit Transfer Information box. You can see the asset's new Business Unit and Asset ID there. This confirms the transaction has completed successfully – you can notify the receiving business unit employees to let them know the asset is now theirs.



Now we want to cover a few other house keeping tips for approvals:

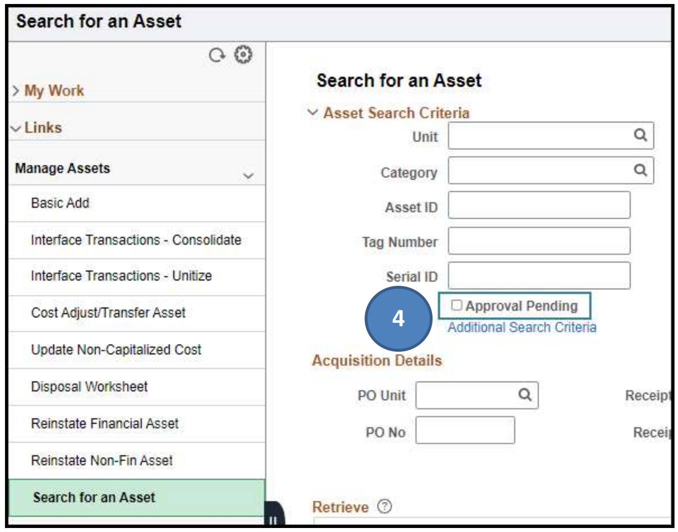
- Assets with a pending approval will be locked from further transactions until the approvers act on them.
- A field will appear on the Review Cost page indicating assets that have a Pending Approval. You can see it in that top right image right underneath the Business Unit field.
- Point 3 - Approvals must be completed in the open period. Expired IUTs can only be denied. You can see an example message of the system blocking the approval of an expired IUT on the lower right of the slide.

Expired Disposals will still generate an Interface, but the Interface will error when the Asset Processor attempts to load it. They'll have to exclude any expired interfaces.

Financials Asset Processors will have to resubmit expired transactions.

Additional Approvals Information

4. The **Search for an Asset** page can be used to quickly identify all of a Business Unit's assets currently Pending Approval



Finally, the Search for an Asset page has a field that you can toggle to quickly find all assets currently pending approval. Reminder that the Review Cost and Search for an Asset pages are accessible to all asset role users.

Let's review our Learning Objectives:

You should now be able to:

- Navigate through Fluid tiles to the Asset Module
- Access the **Asset Management WorkCenter** and **Pending Approvals** page
- Submit requests for InterUnit Transfers, and Disposal Worksheets
- Locate, view and manage pending approvals
- Validate the status of transacted assets

And with that, we've reached our course review!

We've shown how to navigate through the new Fluid interface to get to your transaction and approval pages efficiently.

Financial Asset Processors should now know what types of transactions will be routed for approval, and they should be aware of the adjustments to the process. Key differences are

- Transactions now process after being approved
- Going forward, only the Disposal Worksheet will be used for all retirements
- Comments and Attachments are directly accessible on transaction pages, and Disposal Authorization should be added as a new asset comment.

Approvers have been shown how to get their new pages, how to look up transaction detail as well as how to act on the approvals.

And, finally, how to validate the status of our assets after the transactions complete.

We hope you feel confident in being able to fulfil whatever role you have in this new process.

We now want to take whatever time you need to answer any questions about any part of this entire course.

Congratulations! You have now completed the L200 Asset Management Approval course!

Core-CT

1. Complete the Training Evaluation.
   Asset Management Approvals

2. Review the course material after Training completion.
   Training Material Location (TBD)

3. Reference the Core-CT Modernization site for more information:
   Core-CTModernizationProject(state.ct.us)

Congratulations! We appreciate all the time you've spent with us. If you can, please complete the training evaluation. We'll make the covered material available to all participants for future review and will provide a link. Don't forget to visit the Core-CT Modernization webpage to find more information about our upgraded system.

We look forward to hearing about your experience after Go-Live. Have a wonderful day!