

# Transcript

October 8, 2024, 1:05PM

**PS** **Przygocki, Scott** 0:05

OK.

Welcome everyone to the asset management approvals L200 training session.

This training is designed to provide asset management teams with the necessary knowledge and skills to manage asset management approvals effectively. Specifically, this is geared toward users with a financial asset processor and asset approval roles.

My name is Scott Burgaki and my name is Juan Diaz.

And 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, Sean from the core CT help desk.

In this course, we'll be covering the new fluid interface for asset management approvals as well as submitting and approving asset disposal and inter unit transfer requests.

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 Sean 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 use, we will highlight the system upgrades and changes that are relevant to your roles and these guidelines aim to enhance your learning experience and ensure effective communication.

We also want to give a brief breakdown 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. Sean is our facilitator.

Who will bring your 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 can.

Think of them now.

Let's get started with the training.

As we mentioned, this class is geared towards 2 roles that will be involved in the new asset approval process. All agencies already have financial 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 root for approval, disposals and intra unit transfers. The new asset approver role will need to be assigned to an employee within your agency who will review and ult.

Approve or deny.

This role currently has only one conflict, and it's with the financial asset processor role.

Anyone else in your agency can get the asset approval role and your financial security liaison should have plans to assign it on the day we go live with the upgrade, financial asset processor should hold off on these transaction types until their asset approver has been confirmed to have.

The role.

So the big question, why is this being implemented now when you've never had any issues with these transactions in the past?

Well, a financial security concern was identified with individuals removing assets unchecked. The other supply chain modules were looked at in approval. Workflow proved effective at providing them with similar checks and balances. The state security and Asset Management Division found resolution in having core CT assets also implemented this.

Is the least intrusive way of getting adequate internal controls applied for financial? It's removal.

Now our objective with this course is that by the end, participants will be able to navigate through asset management approval fluid pages, effectively 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 first be sent as requests to approvers.

This 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 and pages that usually have to do with acid tracking. We're going to focus on how to submit requests within the asset management work Centre and utilize the pending approvals tile to manage those requests.

Here we have a breakdown of the courses agenda.

Today's session could take up to two hours.

It's probably going to take much less than that, but we do have plenty of time built in for questions.

We will review key units related to the training material.

We'll also have a recap of what we learned and as I just mentioned, we will have periodic breaks and you can see them all in those Q&A's after each scenario breakdown, we'll have two main units, which will be our example scenarios for the two differ.

Transaction types.

This structure is designed to maximize your understanding and engagement with this new process.

And use our interface.

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 discussion and will also help you with the new course ET in general fluid pages.

This is the new sort of bubbly look many pages of corset are switching to.

This implementation is to make the system more accessible over a wider array of devices.

Home page starting pages where you can quickly access main system content areas and are selectable at the top left.

Drop down when first logging into core connect.

In this training, we're only be focusing on the financials home page dashboard, very similar to home pages. 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 3 tiles and we're only going to be accessing two of them today.

Tiles are large button like navigation tools with icons that we use to access pages and dashboards work centre. All users should already be familiar with this term.

Work centres 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 work centres. They're still very similar to their classic counterparts, but again, have that new look to make them more accessible over a variety of devices.

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.

**DJ** **Diaz, Juan** 7:03

Questions in the chat.

**BS** **Bucchere, Shaun** 7:05

Yeah, no questions in the chat.

**PS** **Przygocki, Scott** 7:07

OK.

Thanks guys.

All right. Well, so we'll continue on. Juan's going to take the reins to cover the first unit disposal worksheet approvals.

**DJ** **Diaz, Juan** 7:16

Thank you, Scott. Hello everyone.

So in this first unit, we're gonna cover disposals, also known as retirements, all of which will now be routed for approval.

This is gonna be done using the existing disposal.

Worksheet says 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 the approvals 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 Approvers will also be able to review some request details through notifications.

So here we see some key asset tiles like previously mentioned, the asset management tile itself will be on the core financials home page and will take users to the asset dashboard where all of the asset related tiles are the asset management work center is a central source for.

Managing assets financial asset processes specifically will have a link to the disposal worksheet page to submit these requests.

The AM Dashboard will also have an approvals tiles.

Once they receive a disposal request, approvers navigate to this tile to manage the request.

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 a step by step.

Process on how to submit a disposal worksheet transaction. So our objective by the end of this section is that you'll feel comfortable with the new approval process.

So first we need to submit a disposal transaction like. Up until now this will be done by the financial asset processors and they'll be doing so using the disposal where she pays.

They're already familiar with.

Here we show a comprehensive navigation to get to that page.

So the path is the core CT financials, asset management, AM Work center disposal worksheet, which is in the manage assets section.

Again, only financial asset processors can see this page.

Here you can see an expanded version of the Asset Work Center 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 also narrow down to a specific asset or pull of 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 to include non capitalized asset text box located by the #3. This needs to be toggled if any of the assets that you're trying to dispose are non capital.

Otherwise known as controllable assets. Once your criteria is in click the retrieve button.

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

You'll also see the assets section, which is where transactional information will be entered.

Choose a disposal code from a drop down, usually their retirement by sale or scrapped assets, and then set the retirement date equal to the date your agency physically release the assets.

Also choose an accounting date in the current currently open period and click the set all button to quickly apply this information to all the assets below.

Then you can refer to the Asset information tab to identify the assets you want to dispose and toggle the check box in the dispose column. You can also review additional details on the other tabs, but for now we're just going to continue with the comments and attachments T.

To include additional information for submission.

Also, 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 in basic AD, but now these links are crucial for complying with central counts payable, security and asset management. New policy regarding disposal authorizations. Previously, the 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.

Or line number three is I mean Image 8.

After clicking the comments link a pop up window will appear with the assets comment history.

Click the plus sign to add a new role and input the disposal authorization.

This is typically the auction number supplied by the DAS procurement 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 and close the pop up.

After entering the disposal authorization, we'll move forward with the transaction process.

Now you can review tabs and fields to ensure accuracy and finalize the selections.

Once certain click the submit button for disposal.

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 this submission.

Muscle Disposal worksheet is submitted.

The approval will receive an e-mail 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 also the list of assets.

Now that's it for submitting a disposal request.

Next, we'll take a look at the approval process, but let's take a minute to review if there's any questions in the chat.

Sean.

**BS** **Bucchere, Shaun** 13:41

There's no questions in the chat at this time.

**DJ** **Diaz, Juan** 13:45

Thank you, Sean.

So now we'll move to the 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.

Now our objective by the end of this section section is that you'll feel comfortable with your new role as an asset approver.

O in this section is for the asset approvers and it covers the main new portion of this whole process.

You can consider this a part two of three for completing disposal transactions. Once the approvers know they have a pending request, they have two ways of accessing it.

1st is going to be through the standard fluid tile navigation.

We'll start by selecting the core CT financials homepage drop down.

Followed by the asset management tile, which will then bring you to the asset dashboard.

There they can access the approval tile.

Note that the tile has a number showing the sum of all their pending pending approvals.

Next, the approvers can then use the notification panels.

New requests will be indicated by a green dot next to the Bell icon. Clicking the bell shows the notification panels.

Approvals will see all pending disposal requests in the Action tab until they are resolved.

These links can also be clicked to instantly bring the approver to the pending approvals page.

Now this is a pending approval 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 sign menu where you can quickly focus on the type of request.

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 since we clicked on the asset disposals in the menu, we're only going to see asset disposals here below.

Excuse me. Below we have some cost of all assets submitted in the transaction.

Now the second column includes additional key transaction information separated by slash marks.

We have the business unit followed by the count of assets on the request, the earliest accounting date and finally the financial asset processors name who submitted the request. These fields can be used to quickly.

Gauge out how much time the request will take to review.

Accounting date is important here as a request needs to be fully completed before that accounting period closes.

Remember that this is the step two of three. Now the third column simply gives the date the request was submitted.

Click anywhere on a line to continue.

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 and 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 details like whether their capital or non capital. If there are capital it shows their category.

The final column also has the approval status of each line.

You could click anywhere on any row to proceed to its line level.

Now this is the line detail page which shows more detailed information about the specific asset we clicked into.

You'll also find the asset attachment box towards the bottom of the page. Approvers 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.

Reviewing comments and attachments helps ensure informed decision making. So use this page together.

All necessary information before.

Thing on the approval request. So once you click excuse me once reviewed, click back to the header link and review the review, the other asset lines as necessary.

So with the asset details, verify the approval request can now be managed back on the header page.

They can approve, denied or hold lines, either individually or together.

By image #5 towards the lower left of the page there are check boxes for each asset line.

Approvals will select the specific check box that they want to take action on, preceded by one of the buttons up by the image #6.

They can also use the select all box above the select column to quickly toggle all lines if they review the same action. So if all that details of the request are satisfied.

They can approve and move the transaction onto its final stage.

They can also deny lines. If anything is incorrect or does not meet disposal requirements. This completely cancels the disposal for those selected assets.

They also have a third choice, so the also 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 approval may act on them.

The line is kept pending only for this one approver and approved.

For this one approver to approve or deny at a later time, once the approval clicks, one of the action buttons, an approval comment window will pop up a denied or

hold both so denied and hold. Both require comments to be entered while they are optional for approve follow.

Your agency procedures for entering these the comments are only for the approvers prover's reference and will not be visible to the requester.

Once done, click the submit button to complete processing for the selected line.

If only some lines were processed, the disposal transaction will remain on the pending approval page.

Approvers 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 that this previously processed lines have grayed out check box.

So once an approver process of request, the financial asset processor who submitted it will receive a notification.

So it either be approved or denied. Request 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 hose 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 approval is locking it down and.

Additional details.

Some actions stay until resolve. However, disposal notifications as a whole have a caveat, since notifications are at the header level and not at 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.

Note as a notification. Because of this, we recommend agencies. If so, we recommend if holding lines do last.

But once the request and financial asset processor will also receive an e-mail with every action the approver 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 processor as they don't have access to approval pages.

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

That's a rundown of the approvals.

Portion of this process, a disclaimer that the assets are not yet disposed of, but we do want to take another pause to address any questions in the chat.

**BS** **Bucchere, Shaun** 21:58

No questions in the chat this time.

**DJ** **Diaz, Juan** 22:00

Alright. Thank you, Sean.

So like we touched on before disposal worksheet approvals are really a three-step process submitting approved and load just like previously submit just like previously submitting disposal worksheets doesn't immediately transact the asset retirements. Instead, they create an interface transaction that the asset team reviews and then the asset processor loads. As you know, only users with the asset processor role can load asset interfaces.

Some of you Approvers might also be asset processors, but we didn't include users with the role itself in this training because loading interface is a daily task for them. We're still including it for the approver's benefit, and as it's the final step of the disposal transaction, the goal is to get you guys familiar with understanding pending transact interfaces.

A reminder that anyone with an acid row can review pending interface transactions for your business units on the AM Work Center.

You just have to make sure you have your work center filter set up, which we have which we do have a job a posted for and should take a minute or two to do so we'll start off by covering the fluid navigation again. Once you log in we.

Select the core CT financials from the home drop down, then select asset management tile, followed by the AM Work center tile.

Finally, we'll click the Lowe's transaction into am link from the side menu.

For people who are new to asset management, again the low transaction link is on the left menu under the my work and pending transaction section. The image of the right shows what the page typically looks like and we'll briefly cover some aspects of it now, especially since it.

Look, especially since it's look has changed a bit. You have rows separated out by business unit interface ID and load type. Transactions come from several modules. In our system sources which are indicated in that second column, what's new upgrade is that right most column?

Review pending transaction. The number represents 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 drop down on the left.

There's also now an action button toward the top left.

This will only appear for asset processors, so we're looking at for retirement interfaces and because there are two types of assets.

Non capital and in capital we have two different retirement transaction types. Rats and RNAs.

Now, so now we want to draw your attention to that big #2 image in the two lines it covers. We see both.

We see both of these low 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, two or three to review it.

Once we click a pop up, yeah, a pop up appears with a pre populated search criteria.

All you should have to do is press the search button.

Add the transaction lines so it so as the transaction lines appear below the criteria, we can click anywhere on the line to proceed to the review page.

Excuse me.

And here we have a ax.

And here we have access to asset in the 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.

Can so you can continue to review additional information on this page.

You can use the next and previous in the list buttons towards the bottom of the page to review the other other interface lines. Once reviewed. Once review is complete, click the X at the top of the window to close the review pop up.

So only the asset processors can load interfaces and this is one of their main daily duties with interface review done, they select the transactions line followed by the action button and finally load into AM action a message confirming the process has launch should appear that they simply click.

That they can simply click OK and proceed.

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

This is a process monitor page. We simply click the refresh button until the run and distribution status is changed to success and posted.

Any errors should be reported via footprint and that's it guys.

This is step three of three and the disposal should be transacted.

We'll cover confirming that the.

Excuse me, we'll cover.

We'll we'll be covering to confirm in just a minute, but we want to stop and see if we got any questions in the chat.

**BS** **Bucchere, Shaun** 27:41

No questions in the chat, Juan.

**DJ** **Diaz, Juan** 27:44

Thank you, Sean. So now we'll verify.

Assets have been have been disposed.

There's a few places we can, but the best place to do so is a review call.

Cost page is good to practice to visit this page after any asset transaction.

Our goal here is to help you confidently look up any assets current status.

Here is the fluid navigation.

Hopefully this has already become a familiar to you just within this presentation. This process is also.

Accessible for all asset roles.

Select. So now we're going to select corset financials from the home page.

Drop down, then click the AM tile and then the AM work center tile. Once the AM work, center will look for the review cost page link from the left menu.

And the review costs will put in some search criteria for the assets we just disposed and click the search button.

Don't forget to include ranges here if your assets are sequential and either asset ID or tag numbers, which will allow even faster navigation between assets on the next pages. Pretend we remove that eight at the end of the asset ID for the next page.

So we're going to 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 a status right here in the search results.

And here we have the capital assets cost summary. We can verify the status of the assets 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 also be zero for disposed capital assets which can't, which we can see by image #5.

Note that this is not the same for non capital assets as they don't get these balancing roles when they're retired.

Now that's a complete rundown of the new disposal approval process.

Will stop to review any questions at this time in the chat.

**BS** **Bucchere, Shaun** 30:04

No questions at this time.

**DJ** **Diaz, Juan** 30:06

That's it guys.

Alright, Scott, back to you.

**PS** **Przygocki, Scott** 30:10

Thank you, Juan, for covering that first unit.

Now we're going to move on to Unit 2 inter unit transfers.

These transactions move capital assets from one business unit 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 is that we're requiring approvals and they won't process instantly when their transaction pages are saved.

Instead, they will root for approval, just like with the disposal worksheet transaction.

Unlike the disposal worksheets, there is no interface step. The transactions process upon approval.

Which of course is where the asset approvers come in, and they'll use the same navigation methods we've already covered to manage requests.

Here we'll begin with scenario 5. Submitting interunit transfers, also known as luts.

We'll cover navigation again and approvers will be going to the same pending approvals page as we visited previously.

lut transactions are still submitted on the asset work Center. We hope that by the end of this section, financial asset processors will feel comfortable sending these inter unit transfer requests effectively within the system.

Financial asset processors should be familiar with the page, but we'll go over the new navigation.

From the home page, drop down, select core CT financials, the asset management tile, the asset management, workcentre 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.

Here we have the search criteria page where we'll be inputting asset information for the asset. We want to be transfer. We can only transfer one asset at a time, but you can still search for a range if you want to quickly transact several assets one after the other.

After clicking search, their results will appear below.

Select anywhere on the line to proceed to the transaction page.

On the transaction page, we're going to start off by only seeing one tab here. You will enter the date the asset was physically given to the other business unit as the transaction date. You must choose a date within the open period for the accounting date. We'll look down.

To .5 and the action box, click the dropdown and choose Inter unit transfer.

This isn't to be confused with the transfer option, which is just transferring chart fields. When you want to transfer an asset between business units, you will select Inter unit transfer.

We did in this image with all the transactional data entered. We can click the GO button.

The cost Information tab will appear, which is the page we used to put in the assets new business unit information.

You'll enter the new business unit itself by image number six, and its chart new chart fields down by image 7. If the new BU has an assigned asset ID, you can enter it too, though heavily recommended to keep it defaulted to next.

A new enhancement enhancement to this page is quick access to the assets, comments and attachments which we have expanded by image #8.

Here you should click into the comments link to enter your disposal authorization as a new comment line, just like we did on the disposal worksheet.

You can either.

Attached 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 information 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 acid ID will populate. This used to be the end of the transaction but now it's going to root for approval.

Once the interunit transfer request is submitted, the approver will receive an e-mail notification. This e-mail indicates that there is a pending request awaiting approval included in the included is the main relevant information. The from to business units and the from to asset I DS along with the name.

Of the financial asset processor who sent the request.

Approvers will also receive a notification in core CT that we'll cover in just a few moments.

That's it for submitting an inter unit transfer request.

Exactly the same process for transacting that that financial asset processor.

To except now we have the comments and attachments page enhancement and the fact that the transfers don't process immediately upon page save before we switch gears to the approvers process, do we have anything in the chat?

**BS** **Bucchere, Shaun** 34:54

No questions in the chat.

**PS** **Przygocki, Scott** 34:57

OK, soldiering on then so.

Approving Inter unit 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 inter unit transfers. There is no holding.

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

Again, this scenario is geared towards asset approvers who will be receiving these inter unit transfer requests, exactly like disposal worksheets.

We have a few options on how to navigate there.

We can use the tile navigation from any home page. We can use the home page drop down to select core CT financials.

We'll then proceed through the asset management tile to be taken to the asset management dashboard. From there, the first tile on the page will be approvals.



Approvers will also receive a new actions type notification when an IoT is routed to them. Because these requests are only for single assets.

Information can be displayed right on these notifications, so we can see the from BU and the assets tag number.

This notification is also a hyperlink to the pending approvals page.

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 to 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 approver quickly identify the transaction. We have the from business unit, the from asset ID, the asset description, the assets total capital cost.

The name of the financial asset processor that submitted this request and finally the new or two.

Business unit in the third column we have the date the request was routed.

We've highlighted the arrow at image #2 to proceed here, but you can click anywhere on the line to proceed to the approver header page.

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 approver should review, including asset ID, accounting date, what business unit it's being transferred to and what its new assets ID will.

Be they will also have quick access to the asset attachment spine where they can review disposal, authorization and other Commons history.

The line details page simply shows the from business units chart field information.

After reviewing necessary details, the approver will simply click approve or deny here on the header.

Again, an approval comment 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 the window to finalize both the approval and the transactions as a whole.

The asset is now inactive in the original business unit and in service in the new business unit.

Interunit transfers don't have that interface.

Step that we covered in disposals.

Transaction is taken by the approver. The financial asset processor will receive an alert notification in the system.

These alerts do include the original BUN 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 e-mail with the from to asset I DS approvers.

Tasks are now complete and the financial asset processor has been notified.

Do we have any questions about approving interunit transfers?

**BS** **Bucchere, Shaun** 38:42

There are no questions in the chat.

**PS** **Przygocki, Scott** 38:44

OK.

Thank you, Sean.

So we've reached our final scenario verifying the asset with 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 that you you'll have confidence checking the status of your asset inter unit transfers.

Now all asset users can check the status of assets in your business units.

This is the last time we're covering navigation in in this session, so hopefully you've got this pathing memorized by now.

After logging in, we'll select core CT financials from the home page drop down.

Look through the financial modules and select the assets management tile.

From there, we'll click on the assets management workcentre tile on the workcentre we can find the review cost page under the links Assets Review section.

So again, 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.

And here we're brought to the assets cost history page at the top right, you can see that the asset does have transferred status as expected.

We've also clicked on the second tab, which is the capital cost detail and we've gone to the last transaction, which is in this case is row two of two.

You can also click the view all if you wanna see all transactions.

This is we've gone to this specific tab because we have a useful section on this page, the inter unit transfer information box.

You can see the assets new business unit and asset ID right there.

This confirms the transaction has completed success successfully and you can notify the receiving business units employees to let them know the asset is now theirs.

Now we want to cover a few other housekeeping 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 at.

The top right image right underneath the business unit field .3 approvals must be completed in the open period. Expired intra unit transfers can only be denied.

You can see an example message of the system blocking the approval of.

Inspired intra unit transfer on the lower right of the slide.

Expired disposals will still generate an interface if I've approved, but the interface will error when the acid processor attempts to load it.

They'll have to exclude any expired interfaces. Financial asset processors will then have to resubmit anything that was expired.

And 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 roll users.

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

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

Excuse me.

Efficiently, financial asset processors should now know what types of transactions will be rooted 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 the disposal authorization should be added as a new asset comment.

Approvers have been shown how to get to their new pages. How to look up transaction details as well as how to act on the approvals and finally how to validate the status of our assets after the transaction's complete.

We hope that you feel confident in being able to fulfil whatever role you have in this

new process.

So now we wanna wait to see what use whatever time we have available, which we have plenty of time to go over any questions about any parts of this entire course.

Don't see anything in the chat, but we'll give it a couple minutes.

Right now, just to see if anyone wants to throw anything in there, really throw in any questions whatsoever.

And we'll address them.

OK, I do see something.

From Juan Torres.

When all when will these job aids be available on your website and when is the new update expected to go live?

The update is expected to go live towards the end of November.

Currently.

The job aids for this session is going to be posted fairly soon.

We will.

You should have access to the recording and there is a running Q&A that we have that we've just been building off of.

For any questions that are asked in the session, that will be the only one that we probably have on there right now.

Although it does have to do with all of our so, but so pretty quickly we'll we'll have access to that. And don't forget that you can use the core CT monetization page to sign up for additional trainings right now.

Next one.

Give it one more minute to see if any other chat questions come through.

I don't see anyone typing, so just come to the end then just say 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 we'll provide a link. Don't forget to visit the course CT modernization web page to find more information about our.

Upgraded system. We look forward to hearing about your experience after go live and have a wonderful day everyone.

 **Diaz, Juan** 45:36

Alright, thank you all.

**BS** **Bucchere, Shaun** 45:42

God, can you real quick put that link to the eval in the chat.  
It's not letting me type in the chat.

**PS** **Przygocki, Scott** 45:47

Yeah.  
No problem.

**BS** **Bucchere, Shaun** 45:50

Thank you.

**PS** **Przygocki, Scott** 46:08

Go ahead and stop the recording now.

● **Przygocki, Scott** stopped transcription