CRM FLUID CHANGES

NOVEMBER 2024

Executive Summary

Key Changes

- **With the implementation of the PUM Upgrade, CRM users will experience changes to the CRM and HRHD pages**

CRM

- The Homepage drop down selector is used to navigate between different modules in CRM & HCM
- NavBar is now used to navigate to Menu, Recently Visited, Favorites, etc.
- Tiles are used to navigate to different pages in Core-CT
- Core-CT is now mobile-friendly
- Breadcrumbs are only seen in the NavBar, they’re no longer at the top of the page
- Icons have been introduced, providing a new look and feel for the homepages
- CRM users can now access pivot grids from the CRM homepage

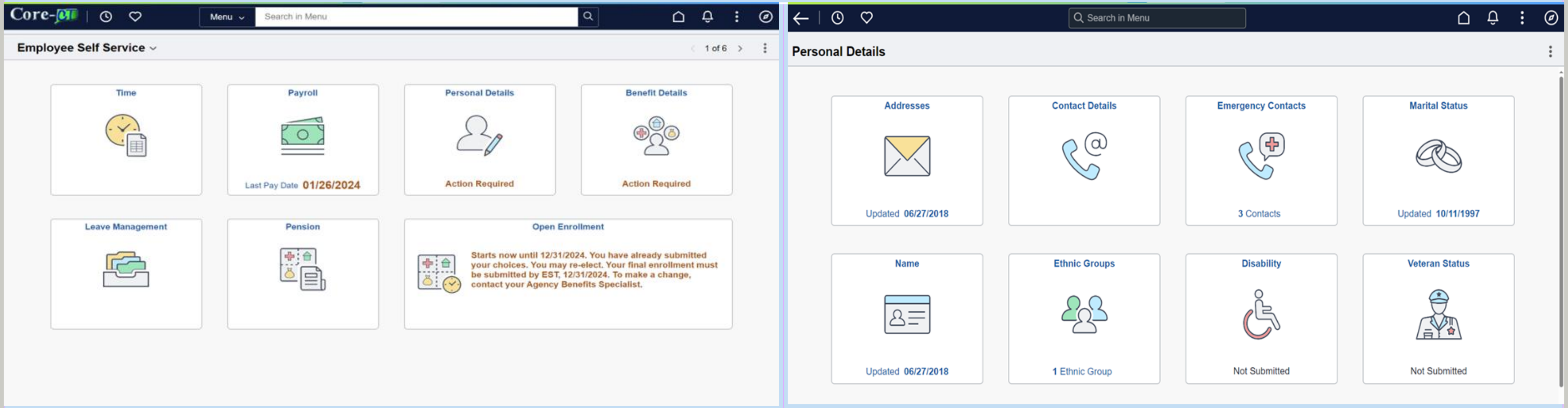
FLUID NAVIGATION OVERVIEW

CRM Users

Homepage/Dashboard View

These Tiles include user-friendly graphics to help you identify the functions you need.

HOMEPAGE VIEW **DASHBOARD VIEW**



To access Tiles, select the Tile by clicking or tapping:

- This allows you to navigate to underlying applications
- From there, you can perform routine tasks

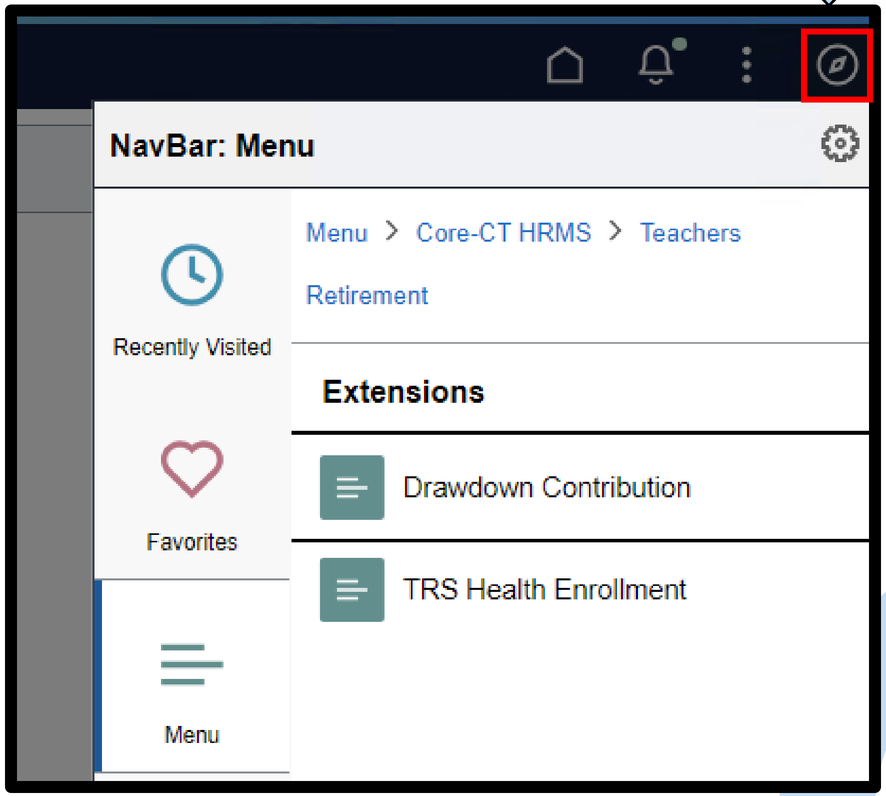
NavBar

The Navigation Bar gives you access to Non-Fluid Navigation options. Under the navigation bar the options that can be seen are Recently Visited, Favorites, and Menu. In Classic, these options existed separately.

***NavBar:** the navigation bar, also referred to as the navbar can be found on the Fluid banner and provides access to the classic, non-fluid navigation.*

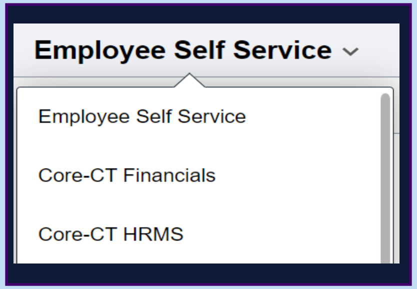
What are the panel's options?

- **Recently visited**
- **Favorites**
- **Menu**



Banner Options: Homepage View

Depending on the role given in Core-CT, unique banner options appear. Here is a list of potential banners.



Homepage drop down selector

Access different homepages if applicable

Recently visited

Display recently visited items in the quick access bar

Favorites

Display favorites in the quick access bar

Home

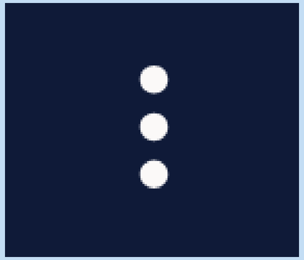
Return to the homepage

Notifications

Display on dashboards or homepages if notification panel is hidden

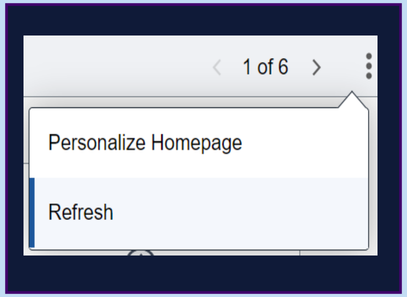
Banner Options: Homepage View

These are some of the available buttons in the Fluid Dashboard.



More Options

Display the menu specific to the Homepage

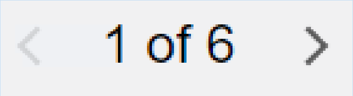


Refresh

Manually refresh Fluid Dashboard

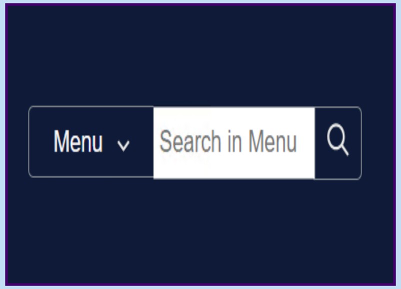
Back

Navigate to the previously visited page



Homepage Navigator

Navigate between Homepages



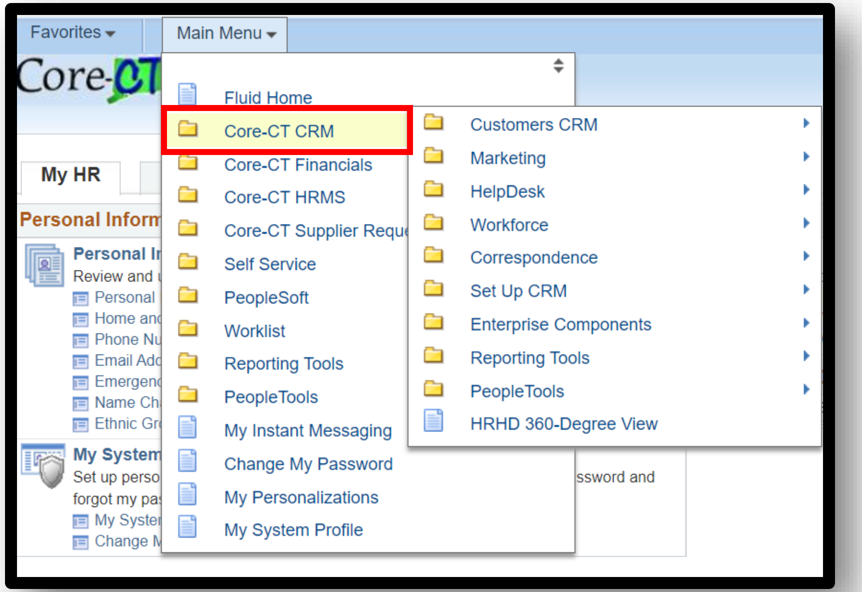
Global Search

Perform Global Search

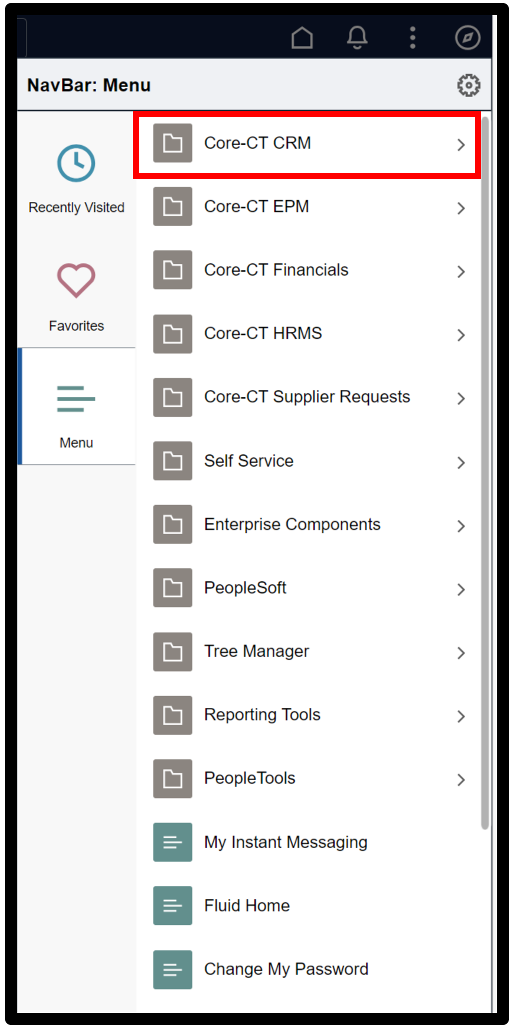
Fluid CRM: Navigation

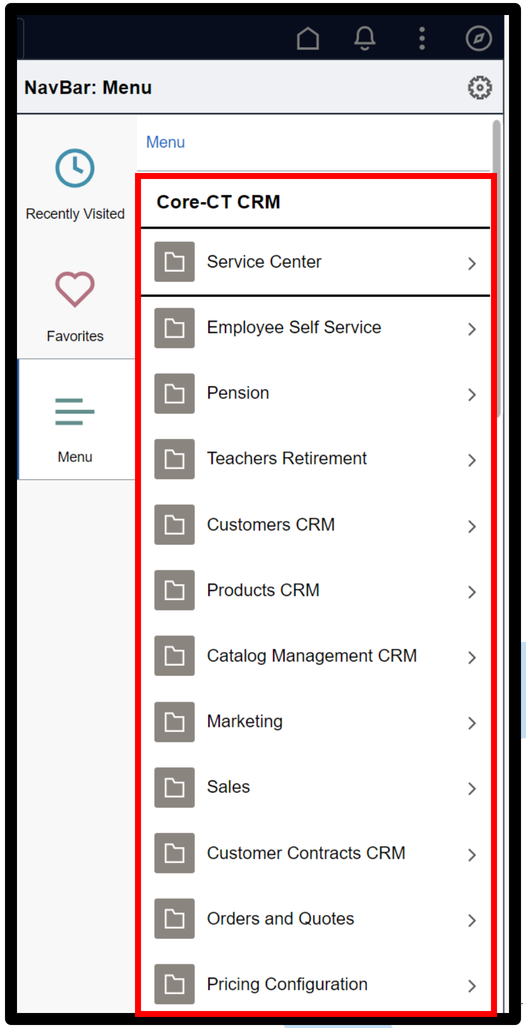
The CRM module can now be accessed from the Navbar. The look and feel of the Menu has changed.

PRESENT



FUTURE

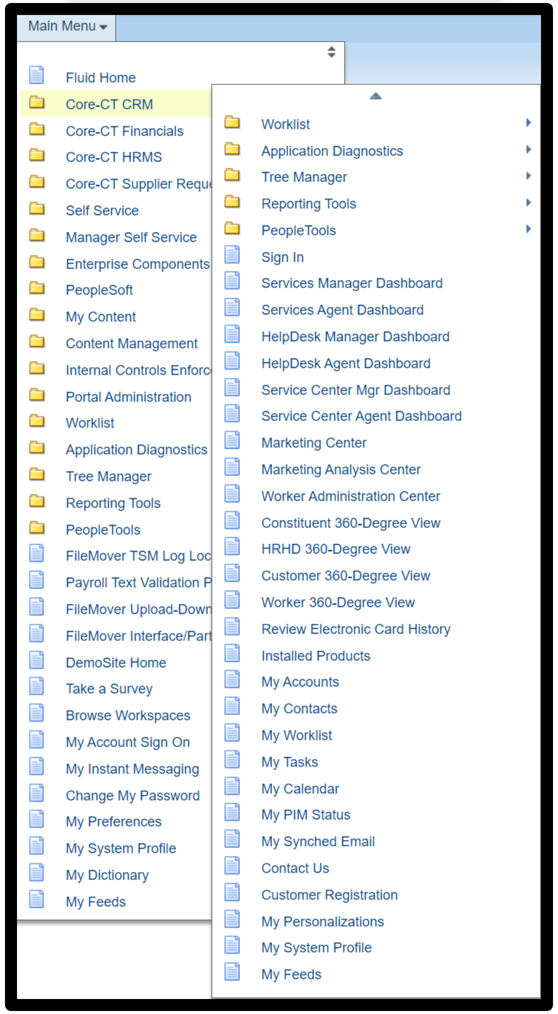




Fluid CRM: CRM Dashboard

The interface and navigation in Core-CT has changed, here's a look at how the CRM Dashboard in classic is reflected in Fluid. The HRHD 360 Degree View search page can now be accessed on this homepage. Please note, this page will differ for agents. See slide 11.

PRESENT



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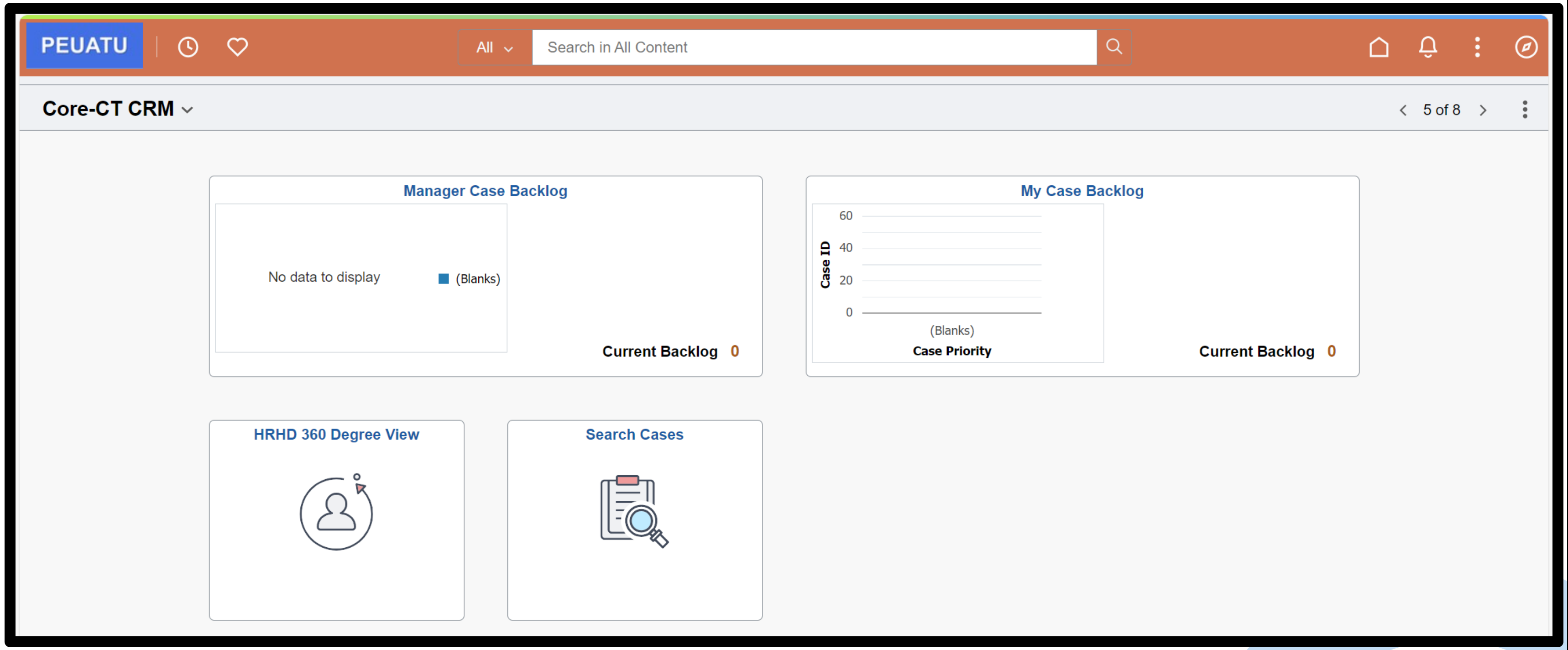
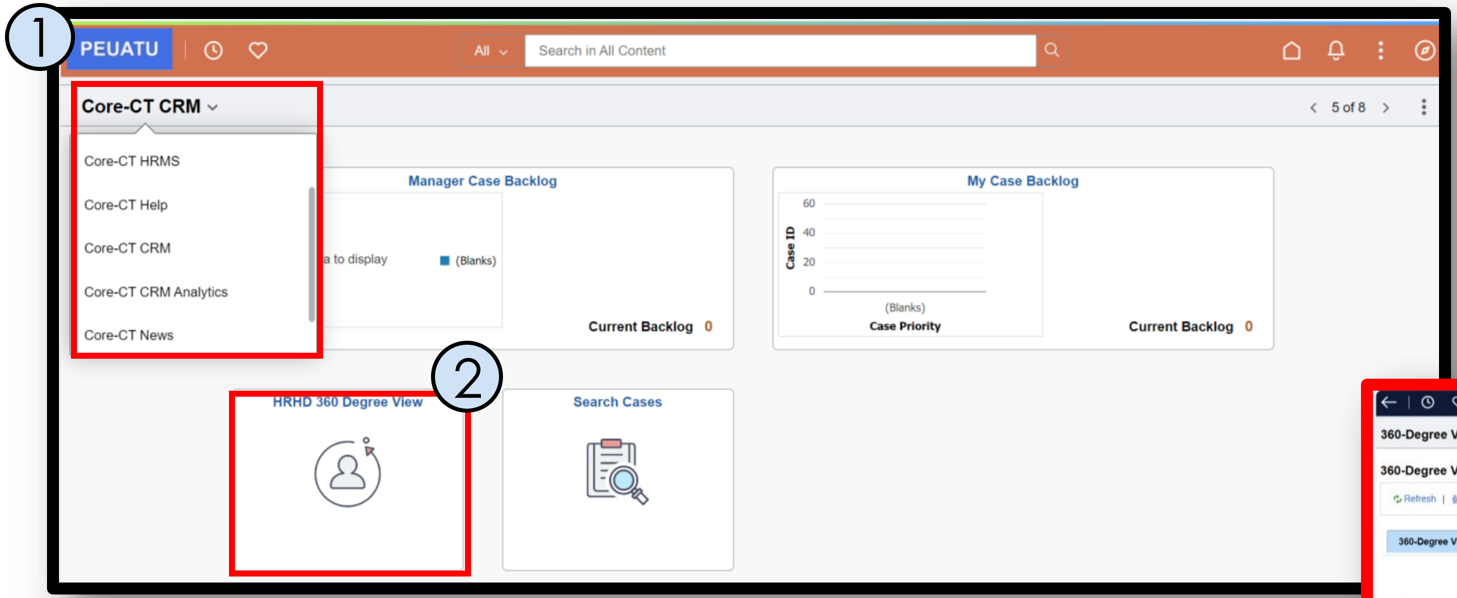


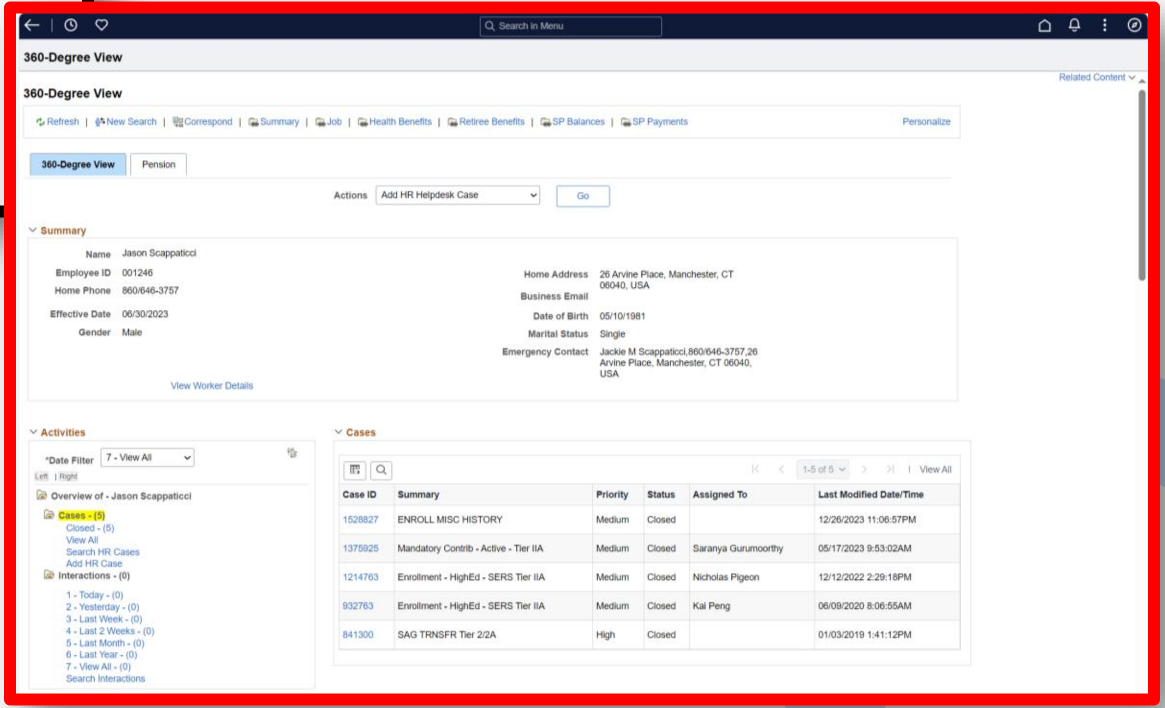
***Note:** Upon the PUM upgrade in October, Tiles are used by CRM users to navigate to different pages in Core-CT Fluid.*

HRHD 360 Degree View: Fluid

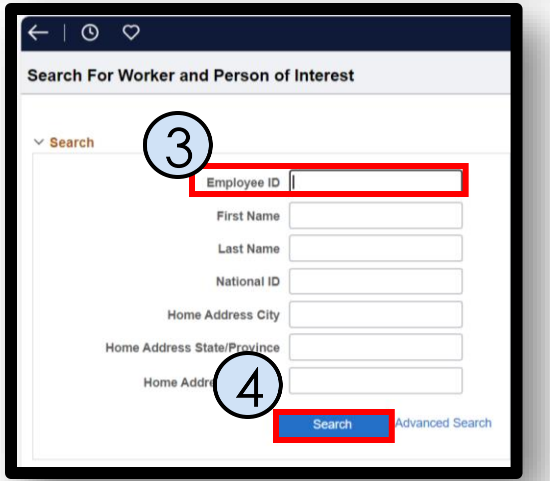
Here's a look at how the HRHD 360 Degree View page is accessed with the PUM Upgrade. This is the view for managers



Note: *CRM users can now reassign and add notes to a case without leaving the page.*

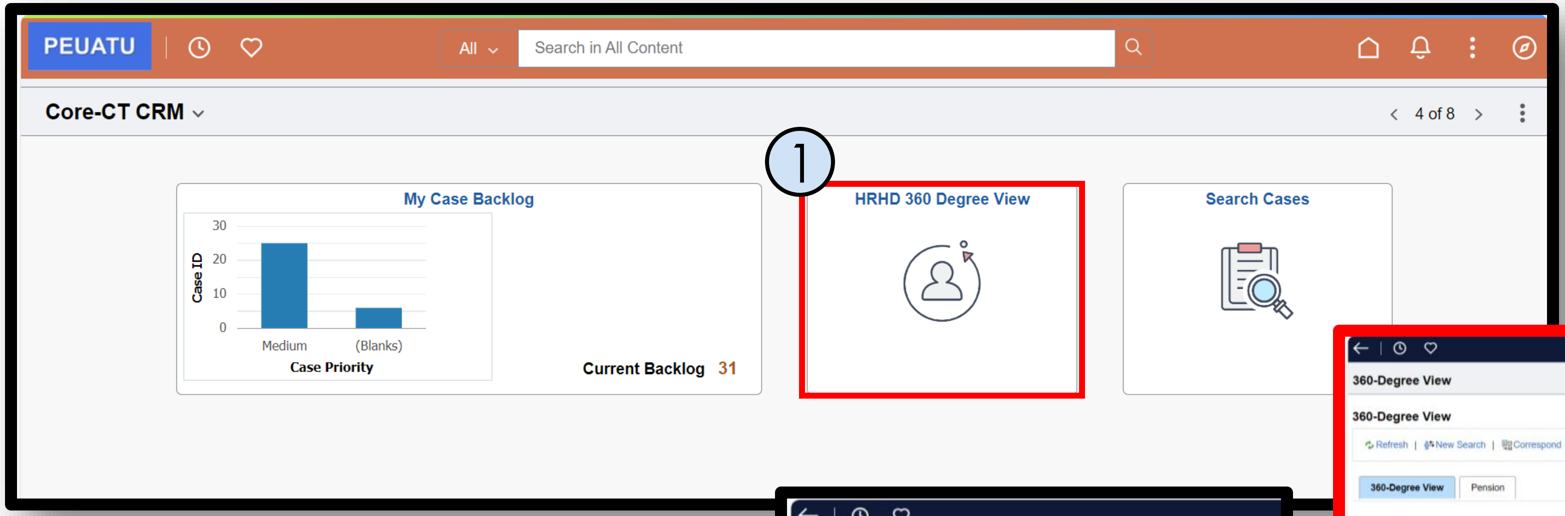


Key Steps
1. Click on the homepage navigator.
2. Click the **HRHD 360 Degree View** tile.
3. Enter in identifying information for a member to populate their 360 Degree View page.
4. Click **Search.**

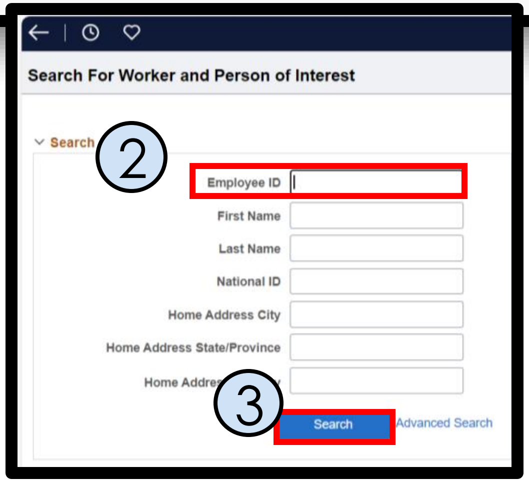


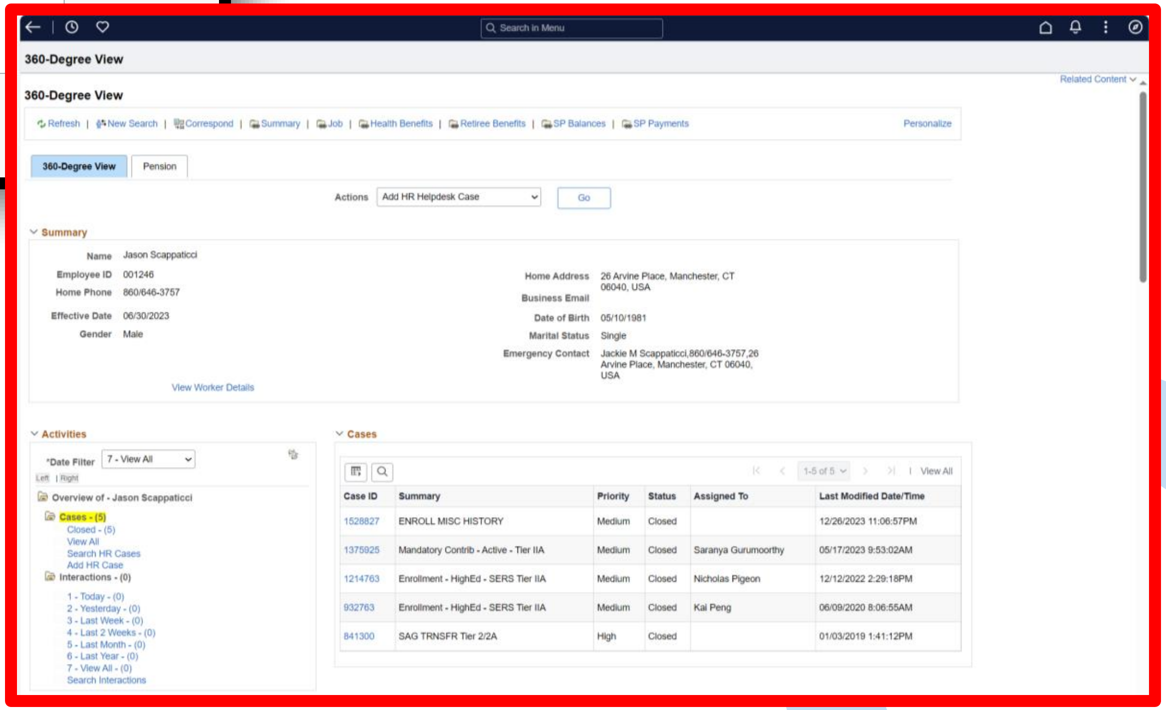
HRHD 360 Degree View: Fluid

Here's a look at how the HRHD 360 Degree View page is accessed with the PUM Upgrade. This is the view for agents.



Note: *CRM users can now reassign and add notes to a case without leaving the page.*

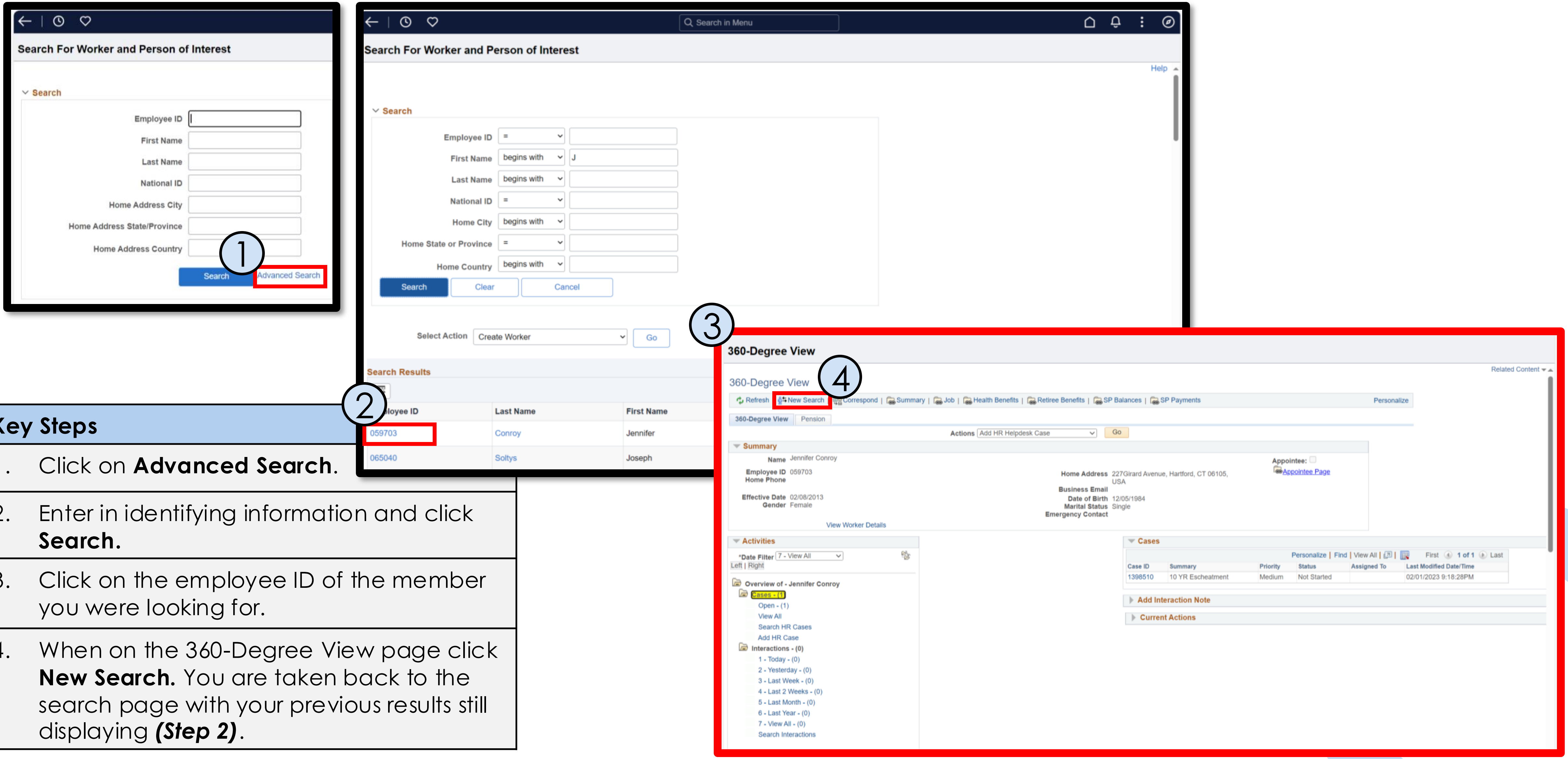




Key Steps	
1.	Click the **HRHD 360 Degree View** tile.
2.	Enter in identifying information for a member to populate their 360 Degree View page.
3.	Click **Search** and then you are taken to the member's 360 Degree page.

HRHD 360 Degree View: Return to Search

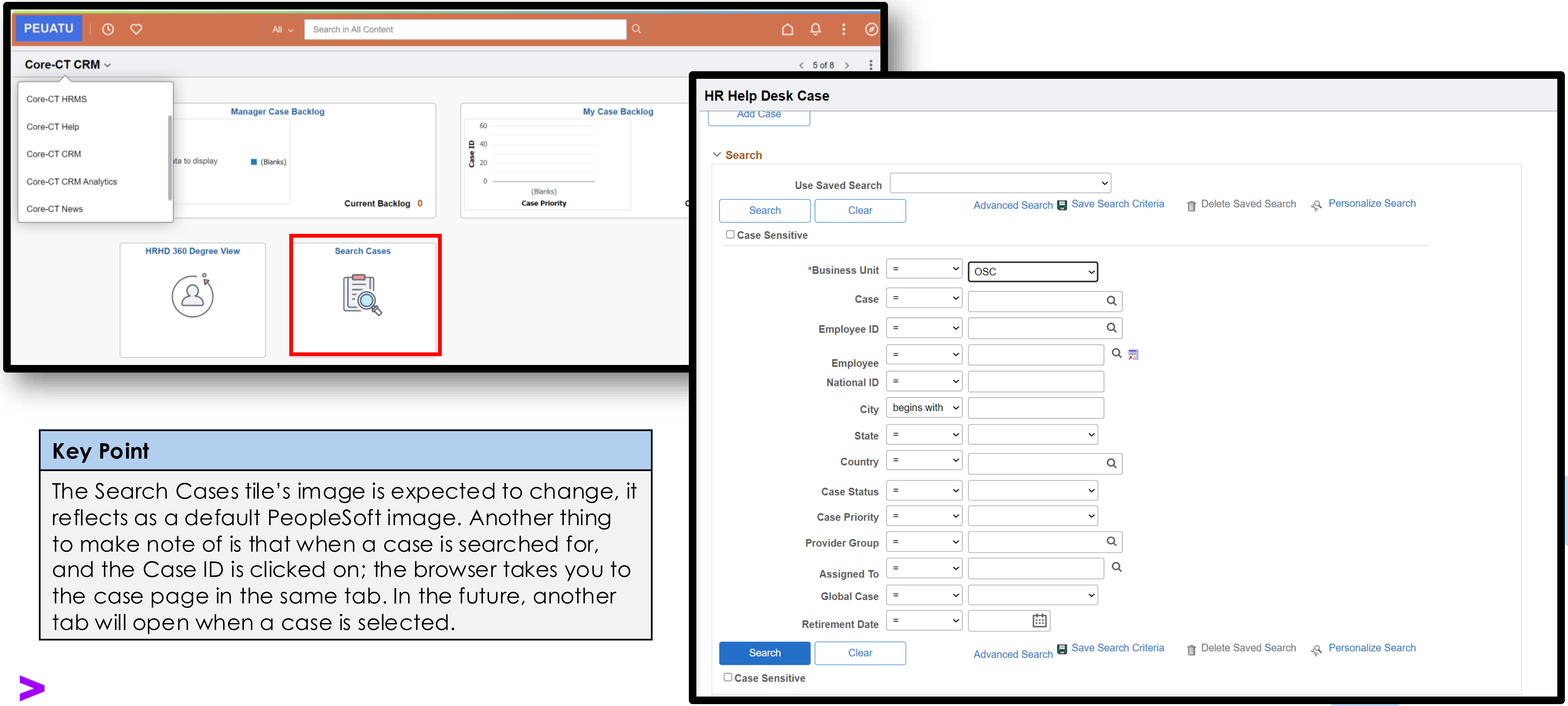
Here's a look at the Return to Search feature from the 360 Degree View Page



Key Steps	
1.	Click on **Advanced Search**.
2.	Enter in identifying information and click **Search.**
3.	Click on the employee ID of the member you were looking for.
4.	When on the 360-Degree View page click **New Search.** You are taken back to the search page with your previous results still displaying ***(Step 2)***.

Search Cases

Here's a look at the new Search Cases tile.



Key Point

The Search Cases tile's image is expected to change, it reflects as a default PeopleSoft image. Another thing to make note of is that when a case is searched for, and the Case ID is clicked on; the browser takes you to the case page in the same tab. In the future, another tab will open when a case is selected.

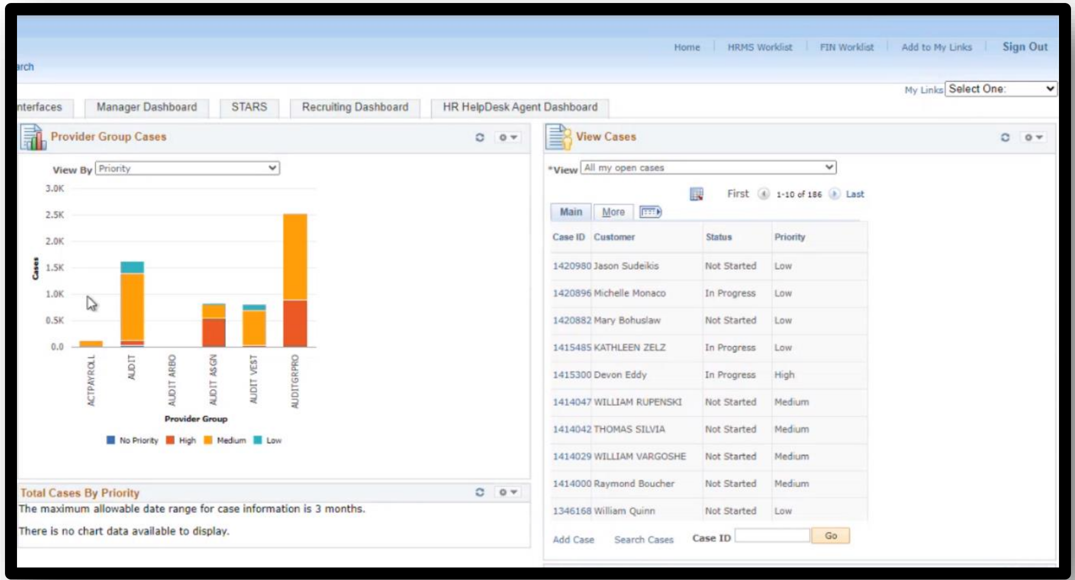
FLUID PIVOT GRIDS

CRM USERS

Fluid CRM: Dashboard Pivot Grids

Manage and My CRM is now known as Core-CT CRM Analytics and can now be accessed from the homepage drop down navigator. It’s landing page includes different tiles that allow for a range of information to be accessed. This is the manager’s view.

PRESENT

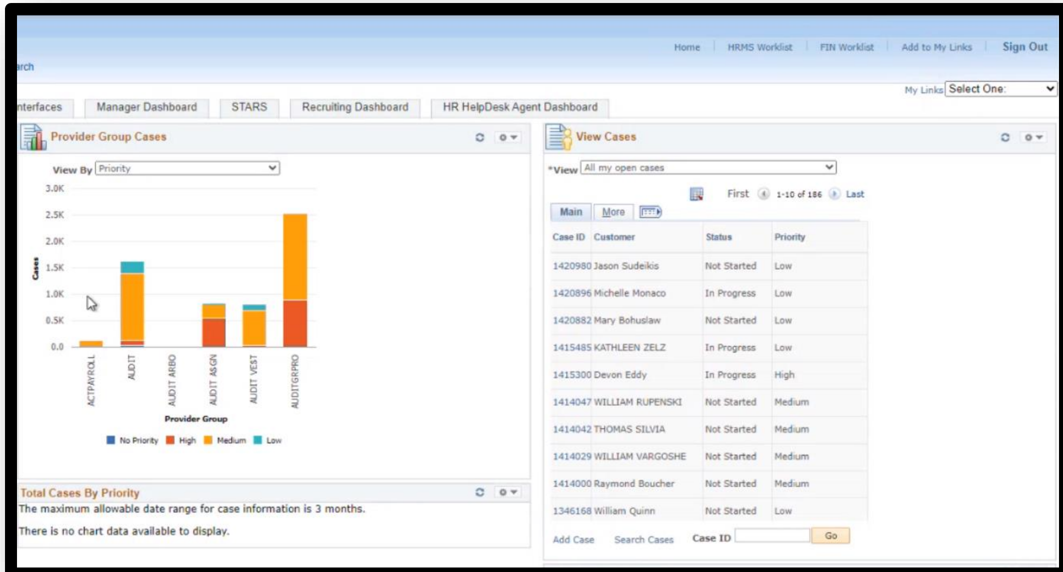


FUTURE

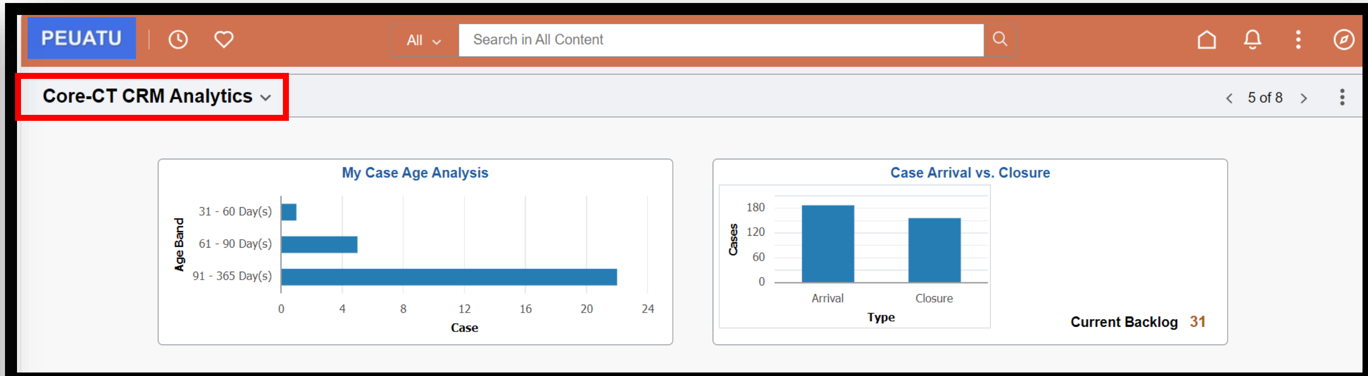
Fluid CRM: Dashboard Pivot Grids

Manage and My CRM is now known as Core-CT CRM Analytics and can now be accessed from the homepage drop down navigator. It's landing page includes different tiles that allow for a range of information to be accessed. This is the agent's view.

PRESENT



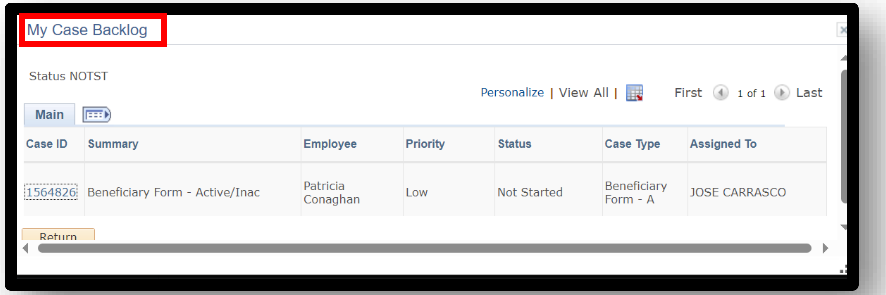
FUTURE

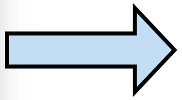


Fluid CRM: Dashboard Pivot Grids

The My Case Backlog page now exists as a tile that is customizable.

PRESENT





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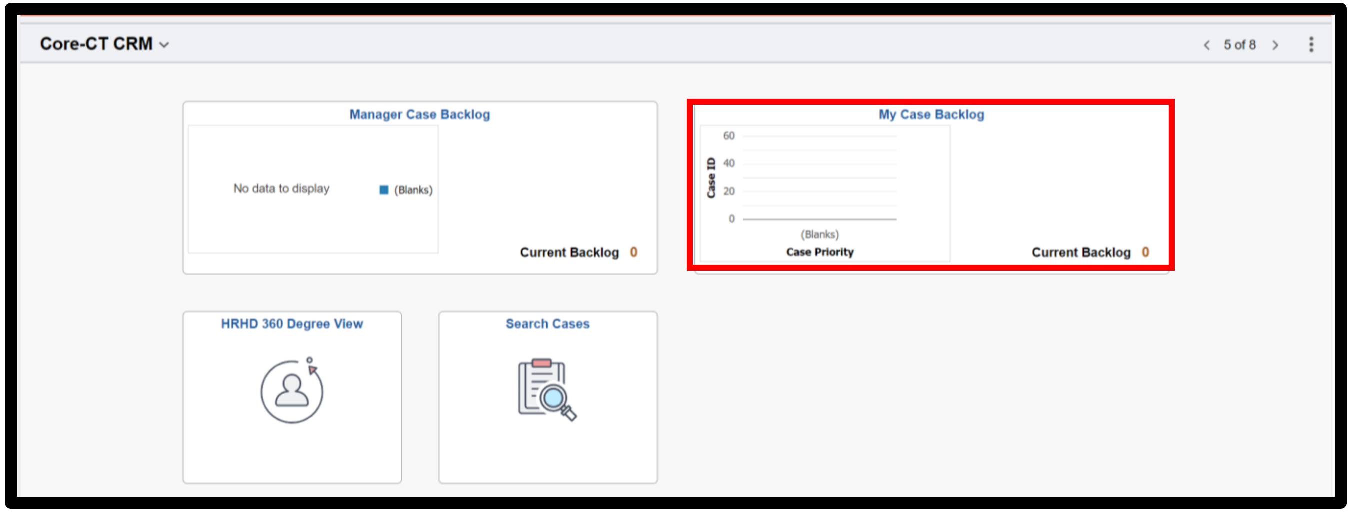
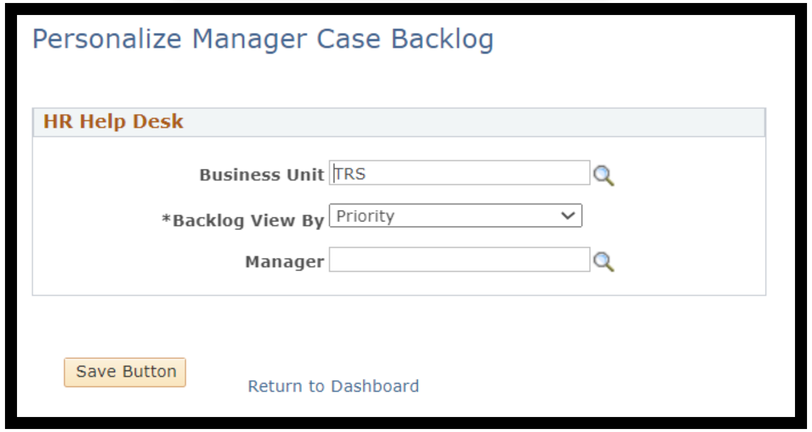


Fluid CRM: Dashboard Pivot Grids

The Manager Case Backlog now exists as a tile that is customizable.

PRESENT



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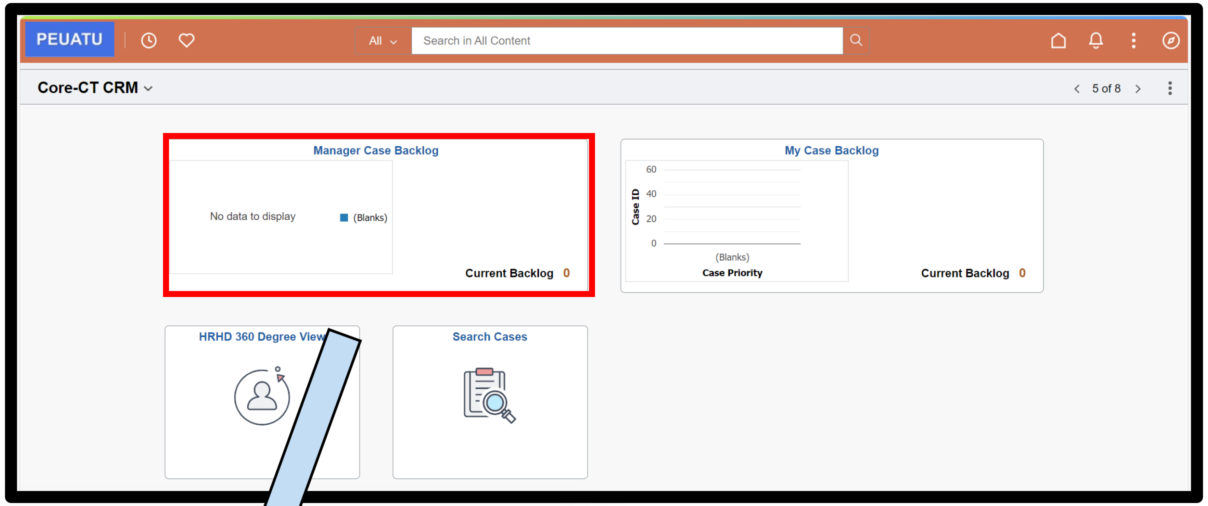
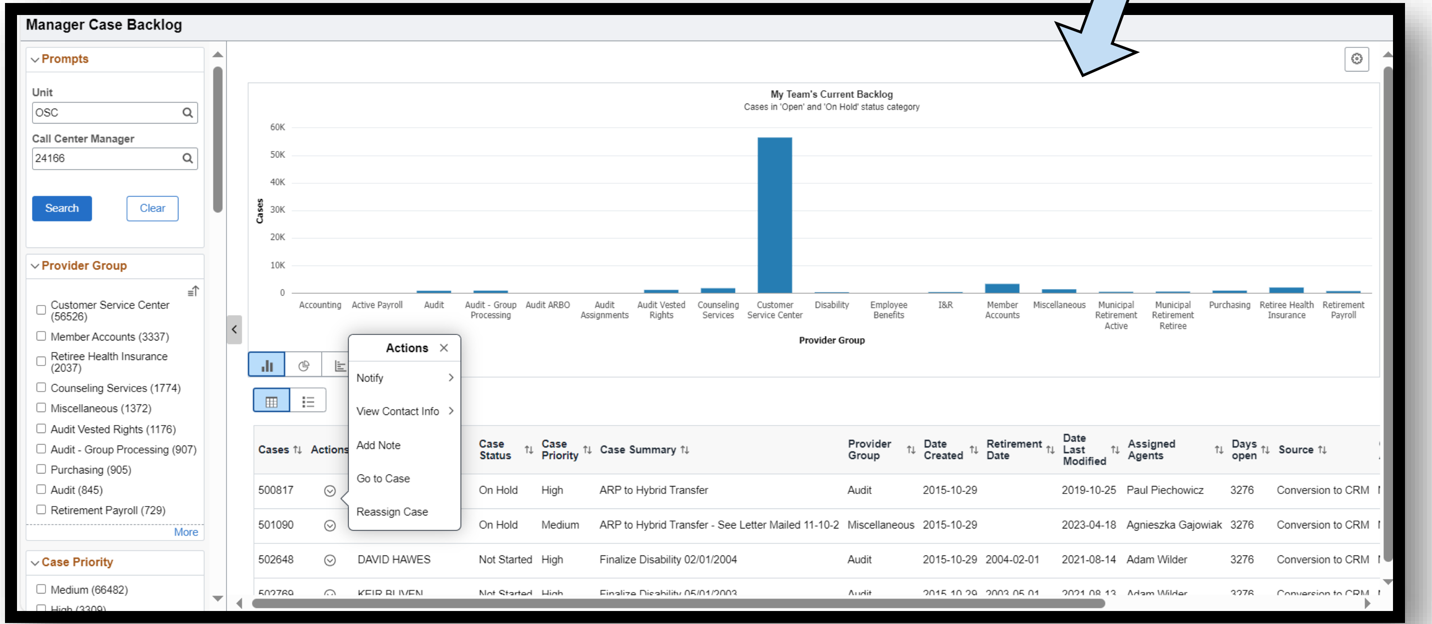
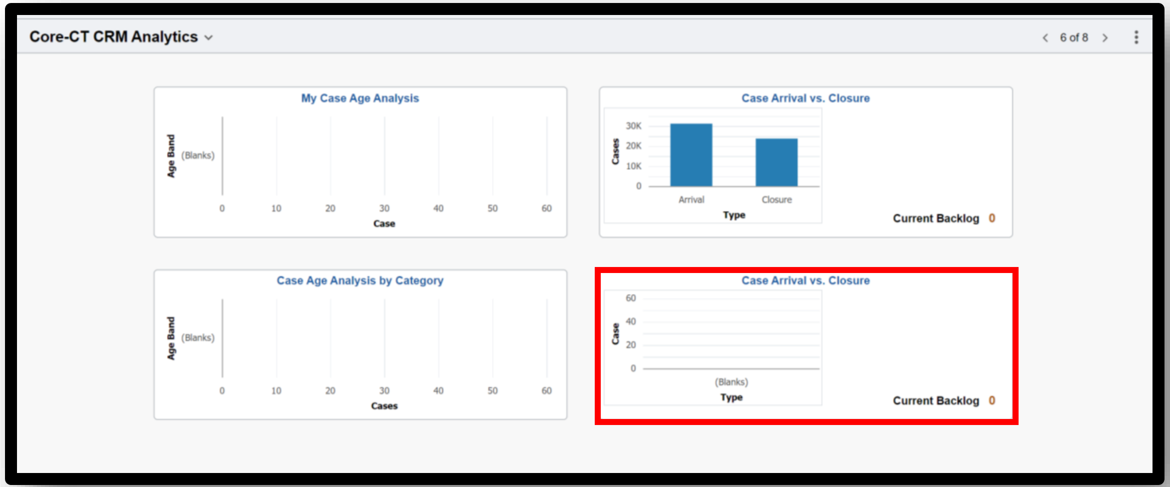
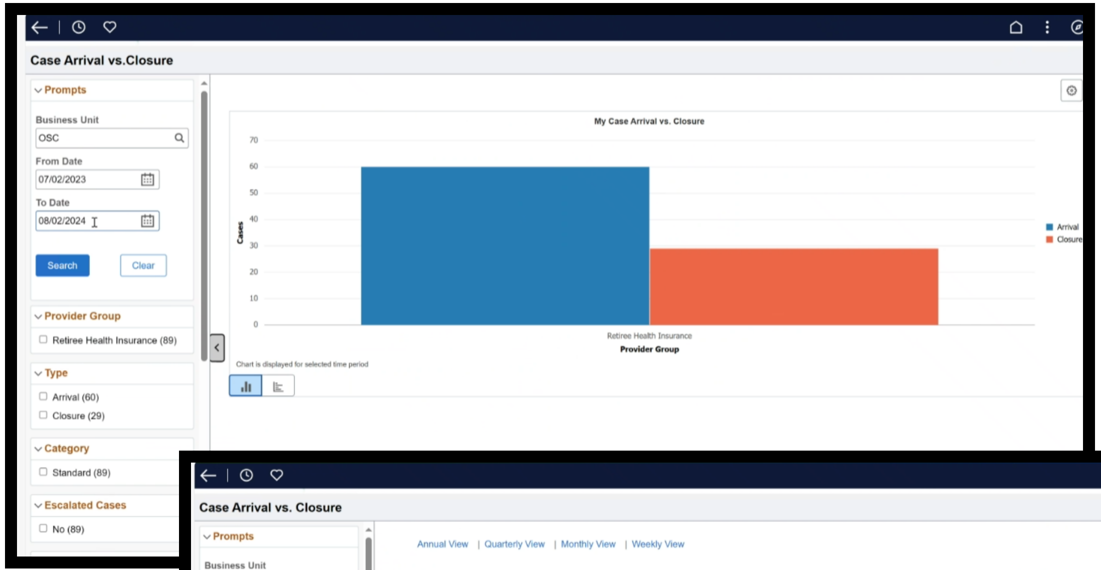


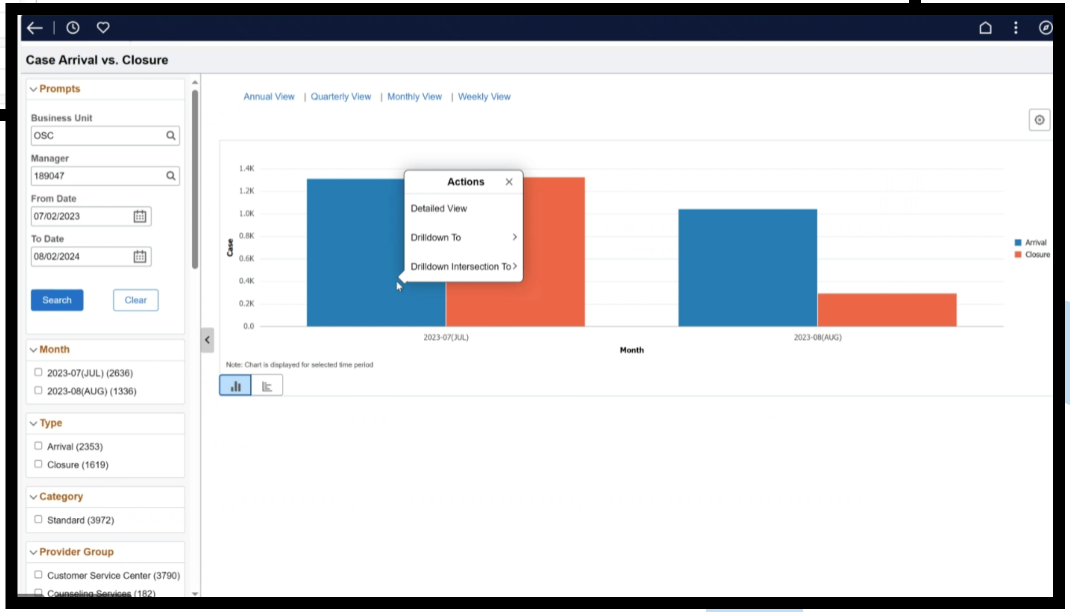


Fluid CRM: Case Arrival vs. Closure

CRM Admin can click on the Case Arrival tile to view and extract case information.

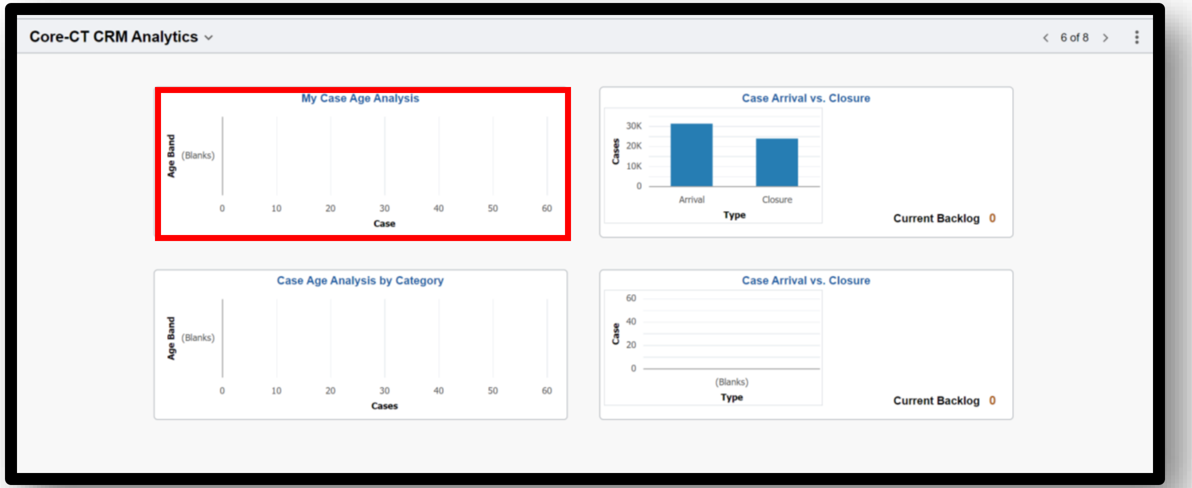


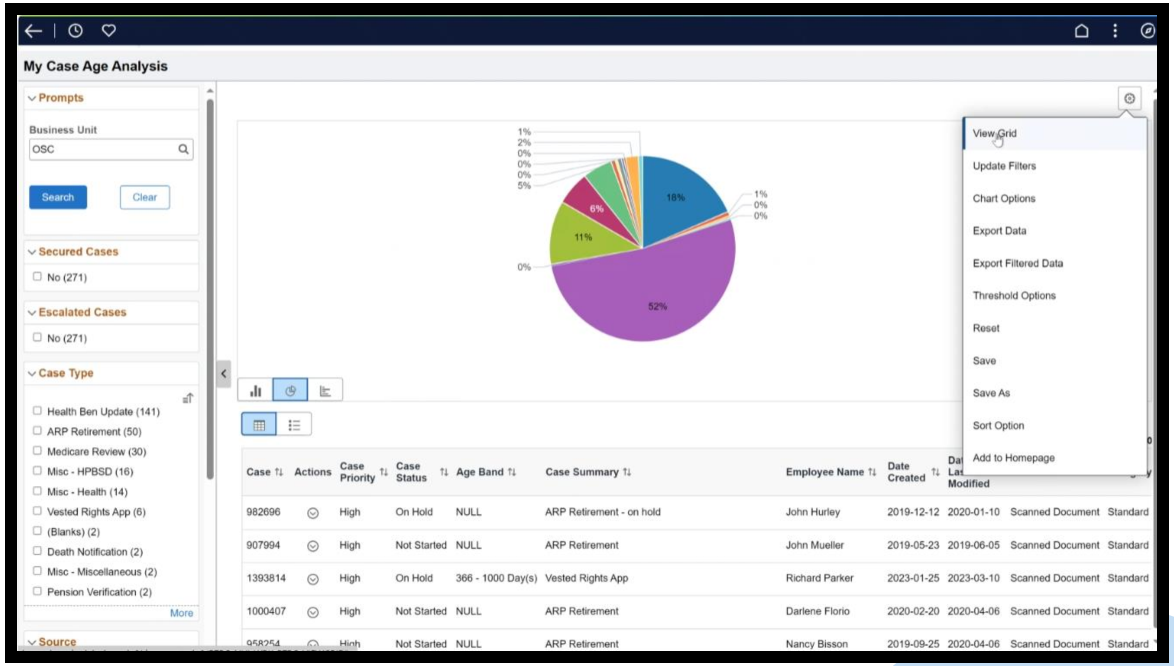




Fluid CRM: My Case Age Analysis

CRM Admin users can click on the My Case Age Analysis tile to view and extract case information. The following pivot table has a work around query for the agent it will be Case Age Analysis and Open Cases . For manager it will be a Manager Backlog and Case Age Analysis.





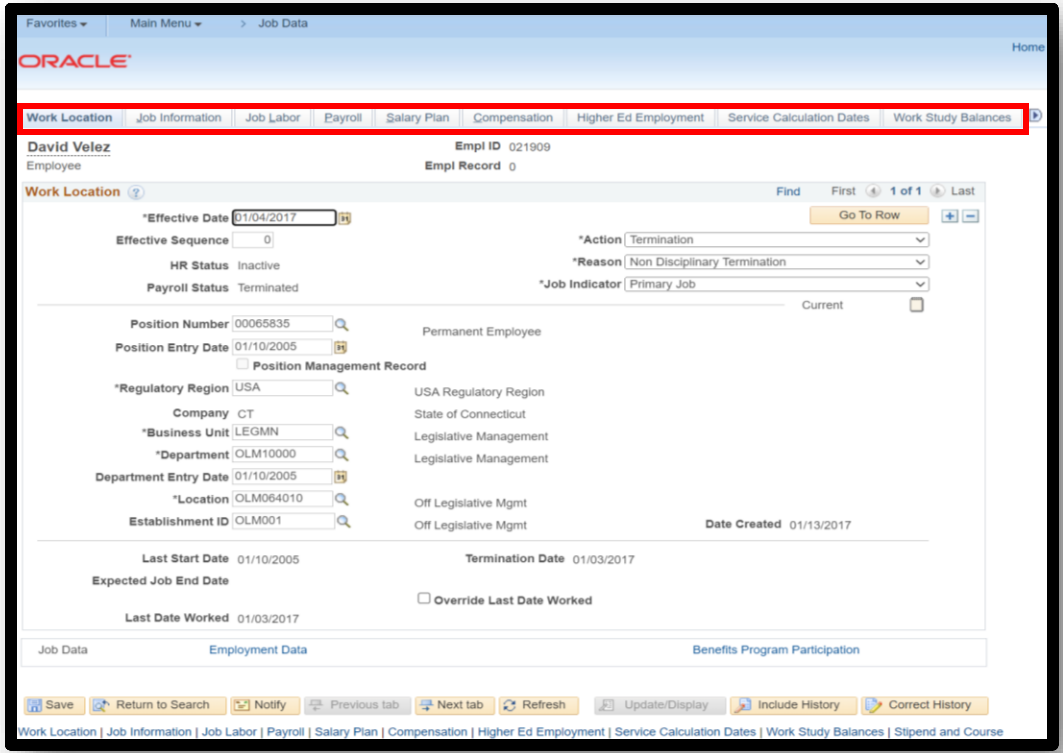
FLUID PAGES OVERVIEW

CRM Users

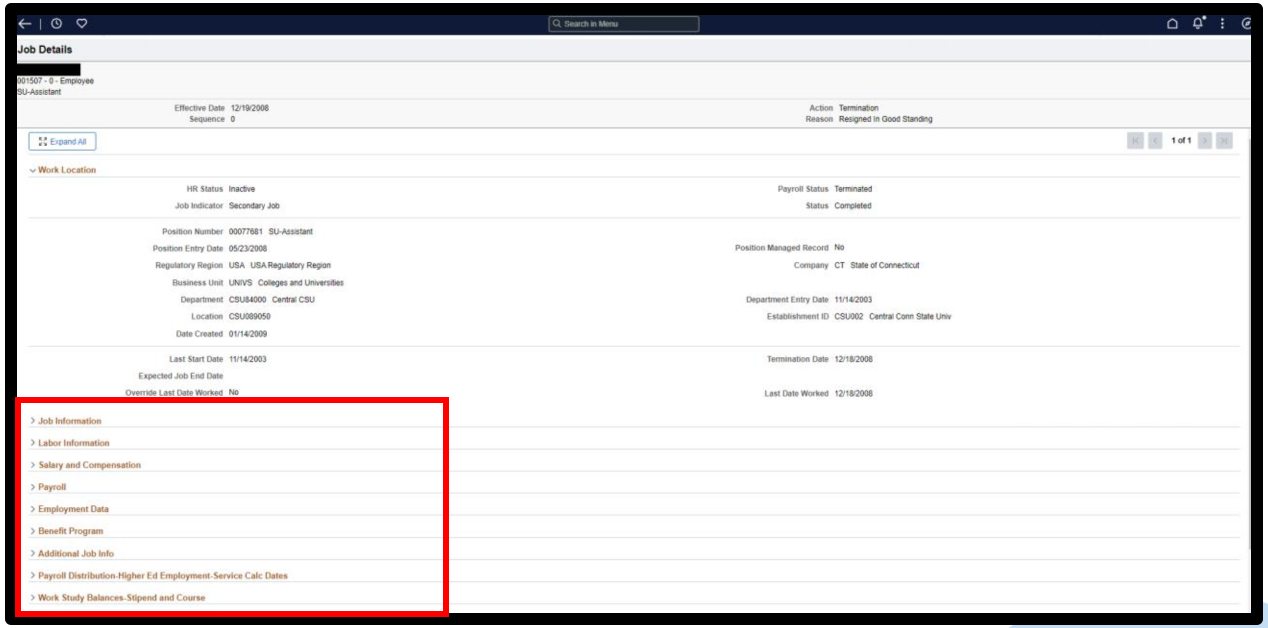
HCM Job Page

The tabs atop the Job page in Core-CT classic are now expandable areas on the main Job page that is accessed through the Manage Job Tile. For more information on the job page, refer to this job aid: [L200 Managing Job Deck]()

PRESENT



FUTURE



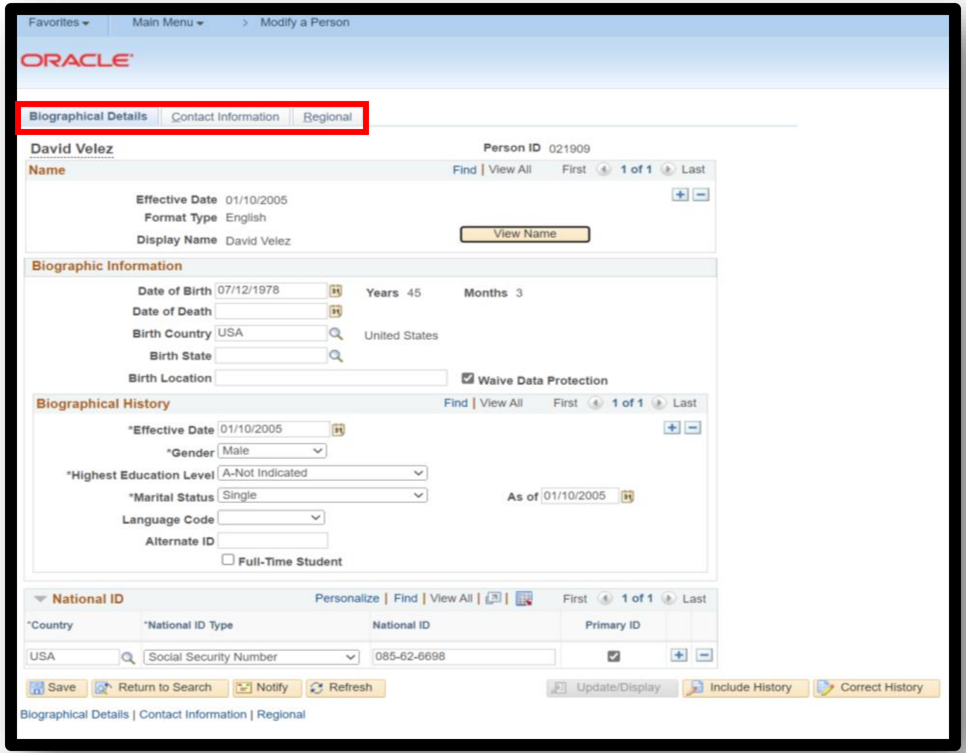
Key Point

What was once tabs listed atop the **Job** page are now drop-down sections. Those sections include but are not limited to: **Job Information**, **Labor Information**, and **Salary and Compensation**. Use the carrots to expand these fields.

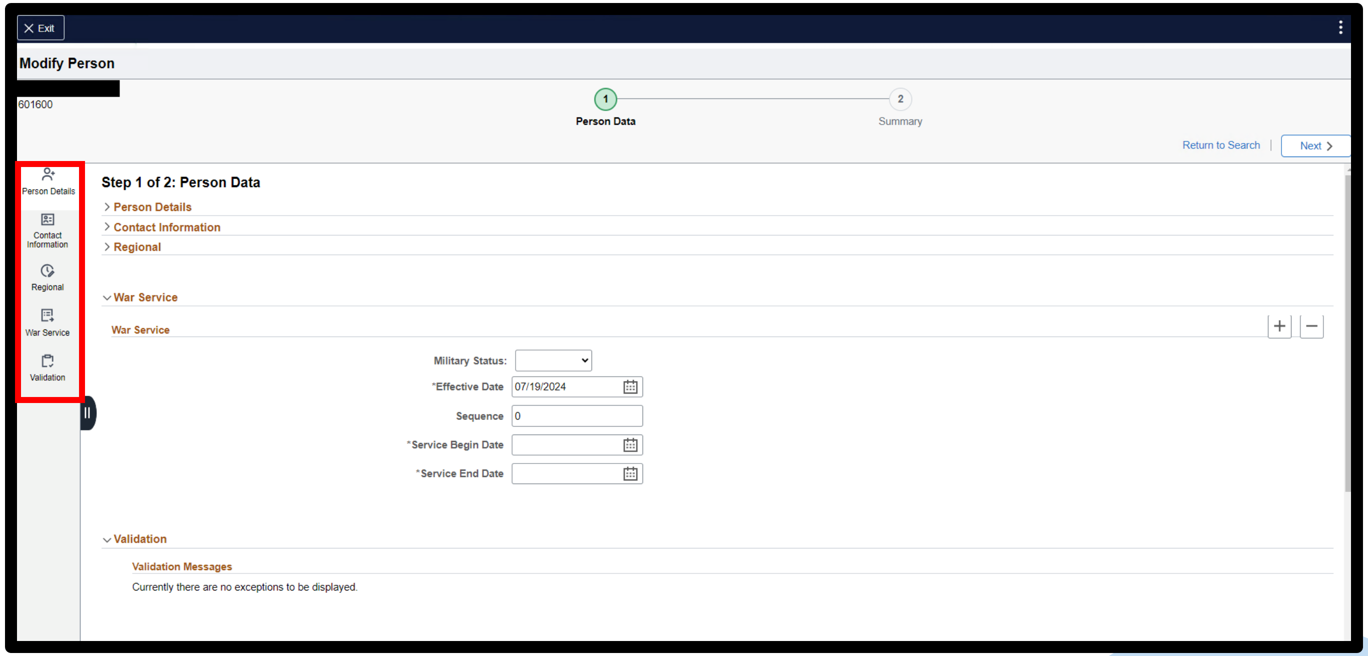
HCM Modify Person Page

Clicking the Summary page on the HRHD 360 Degree View page now populates this Modify Person page. For more information on the modify person page, refer to this job aid: [L200 Personal Data Deck]

PRESENT



FUTURE



Key Point

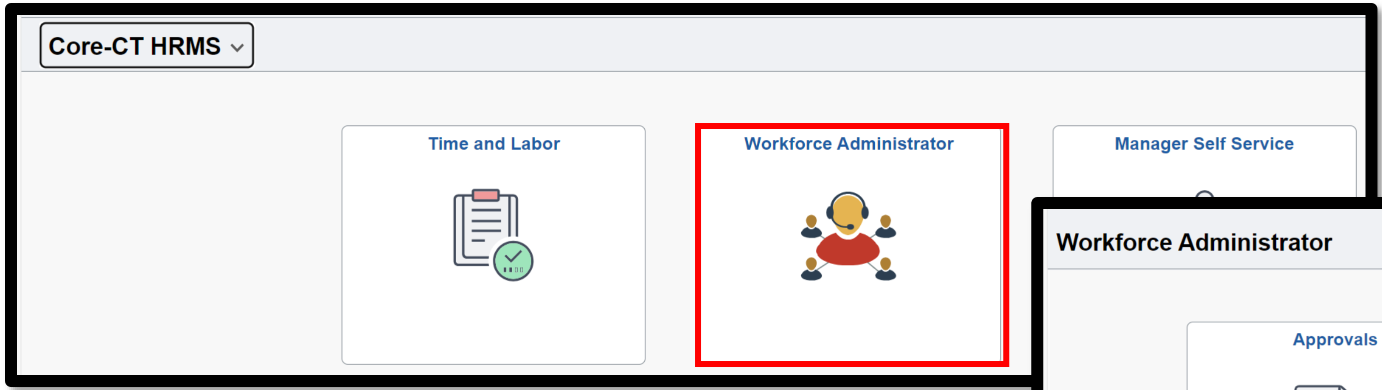
The tabs that existed at the top of the **Summary** page are now listed on the left side of the **Modify Person** page, but can also be expanded by the carrots next to the section names.

CONNECTICUT TEACHERS' RETIREMENT BOARD

ADD EMPLOYMENT INSTANCE

HCM Add Organizational Relationship

This is the navigation to follow to add an employment instance for an employee, this function is now referred to as adding an organizational relationship. Refer to this job aid for more information: L200 Personal Data Deck



Key Point

From the Core-CT HRMS home-page view, click on on **Workforce Administrator > Manage Human Resources > Organizational Relationship**. The equivalent to **Add an Employment Instance** is the **Organizational Relationship** tile.

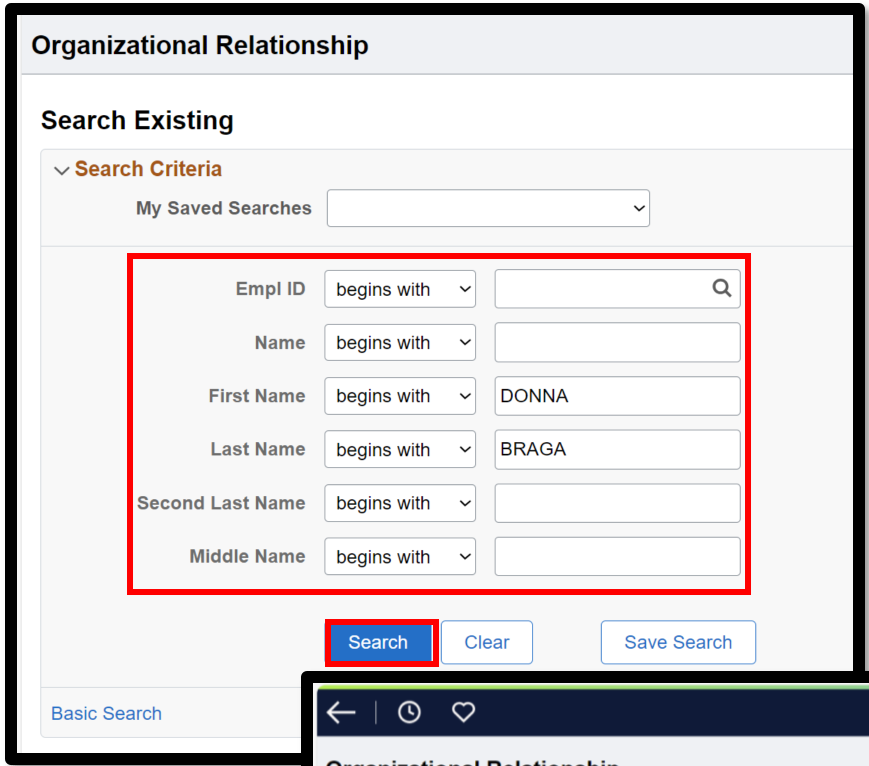
HCM Add Organizational Relationship

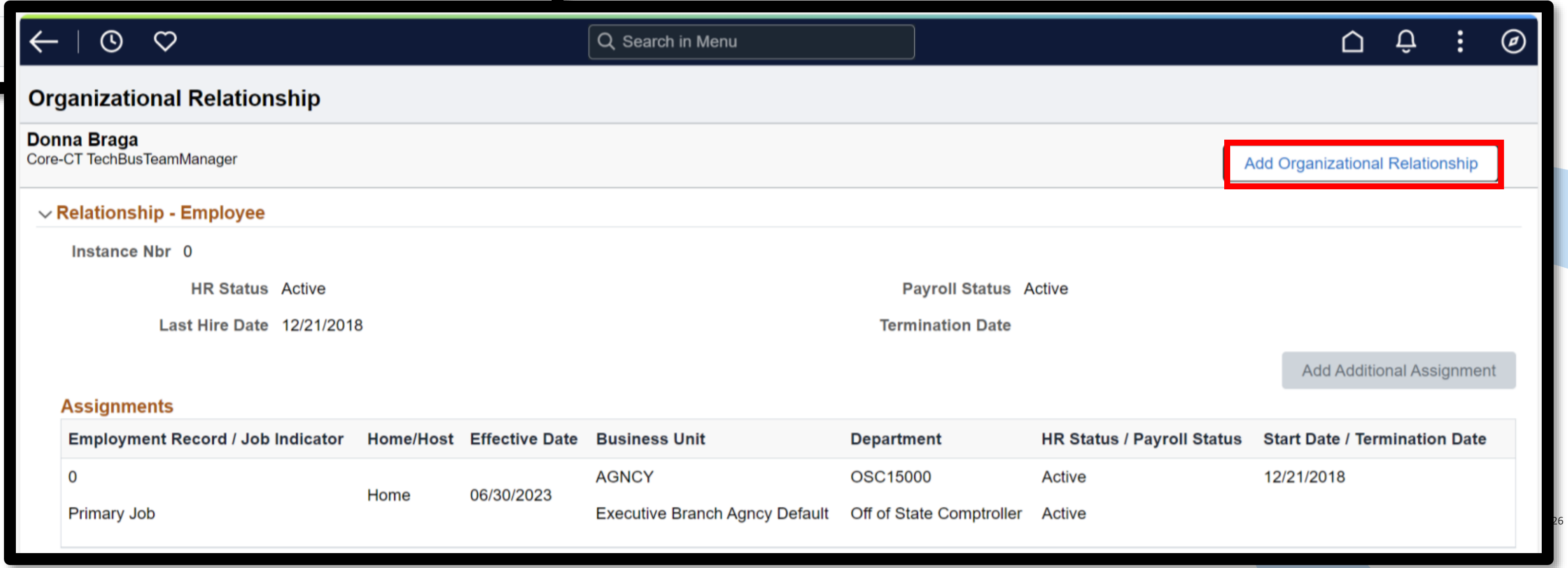
On the Organizational Relationship page use the search criteria fields to search for an employee.

Key Point

On the Organizational Relationship page use the search criteria fields to search for an employee. After the fields are populated with identifying information, click **Search.**

The Organizational Relationship page reflects that employee's information. Such as their **relationship** and **assignments**. Click on **Add Organizational Relationship** to determine how the employee being viewed should be hired.





HCM Add Employment Instance

Online hiring will now occur through the Organizational Relationship pages, the hiring options are: Employee, Contingent Worker, and Person of Interest.

Key Point
After clicking on **Add Organizational Relationship** the options for how the employee should be hired appears. The options included are **Employee, Contingent Worker, and Person of Interest**. Online hiring will now occur through these pages.