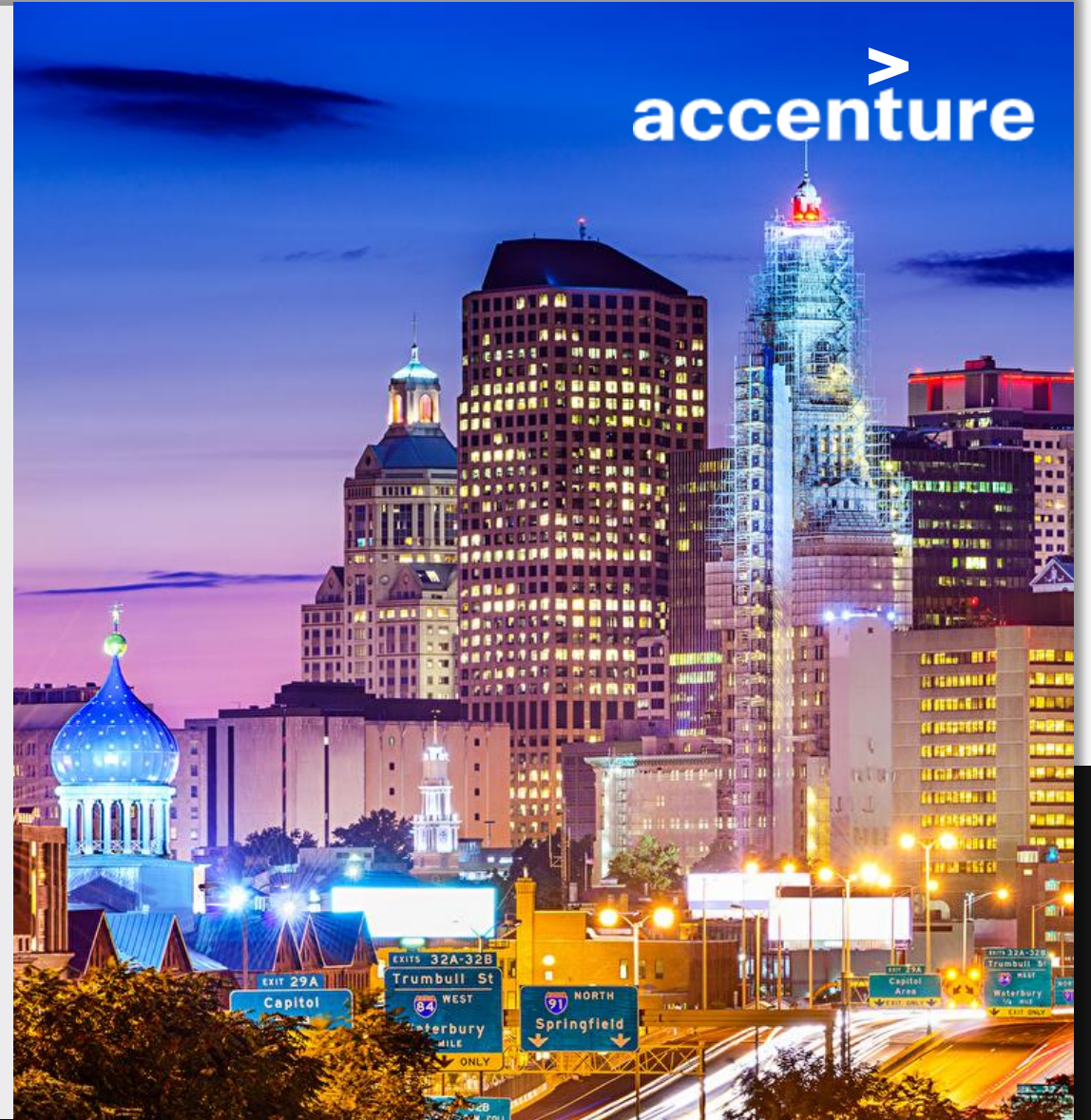




# CRM FLUID CHANGES

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

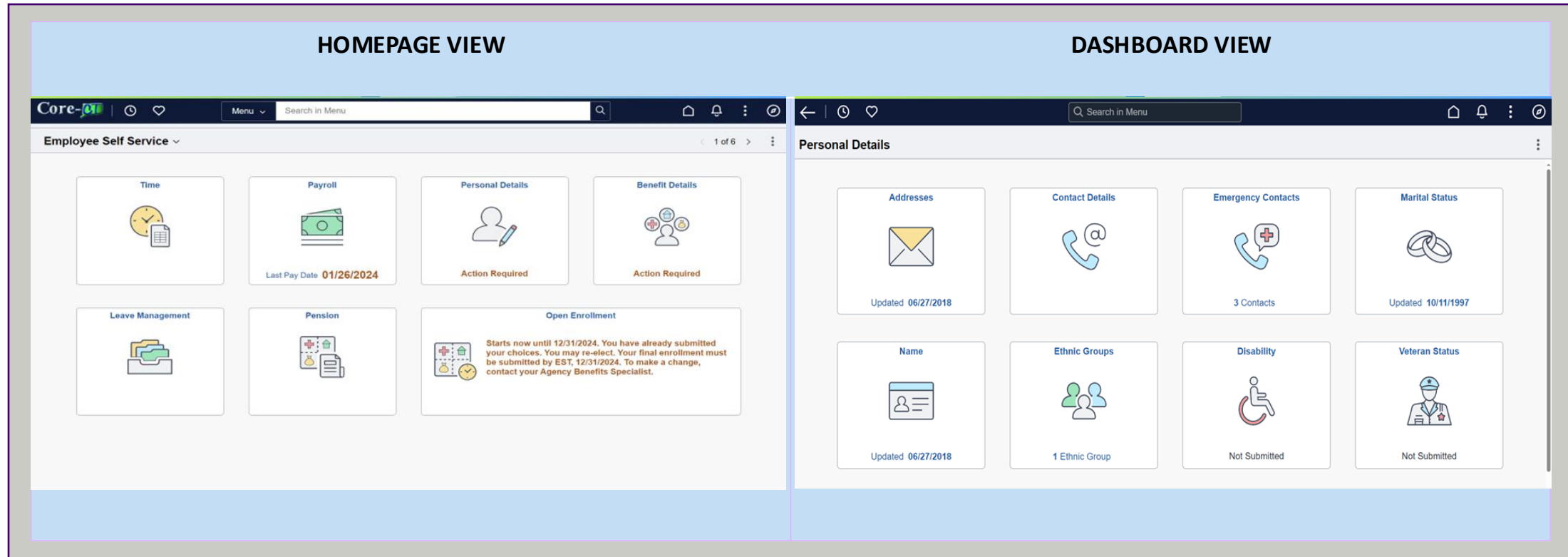
CRM Users





# Homepage/Dashboard View

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



**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.

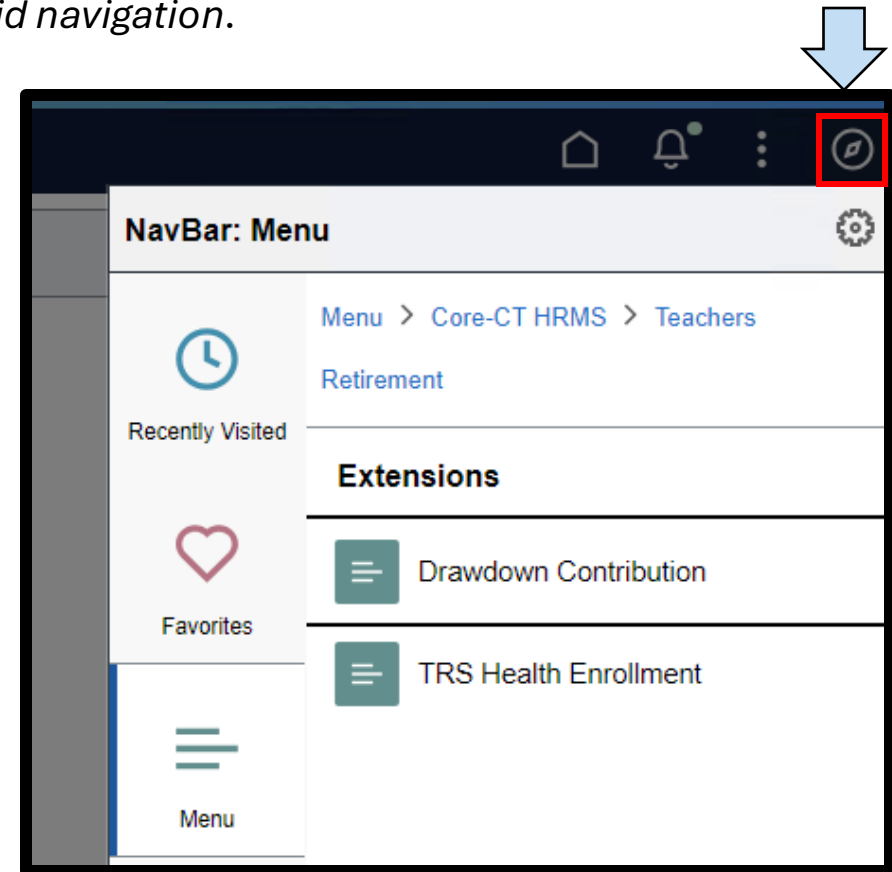
## What are the panel's options?

 Recently visited

 Favorites

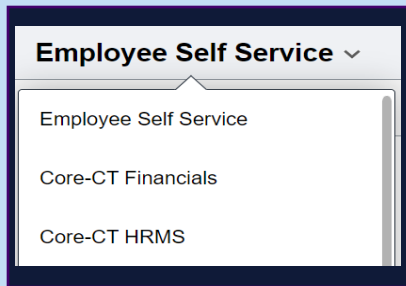
 Menu

**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.



# 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

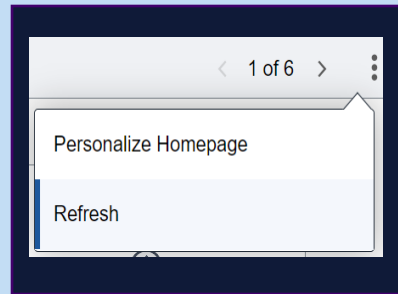
# Banner Options: Homepage View

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



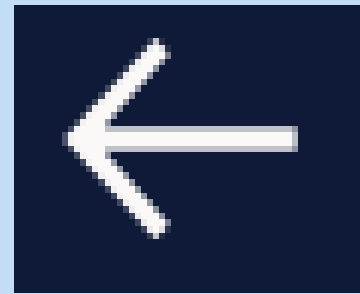
## More Options

Display the menu specific to the Homepage



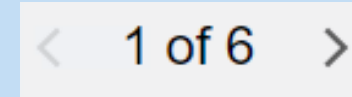
## Refresh

Manually refresh Fluid Dashboard



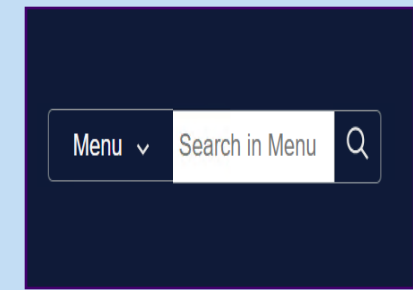
## Back

Navigate to the previously visited page



## Homepage Navigator

Navigate between Homepages



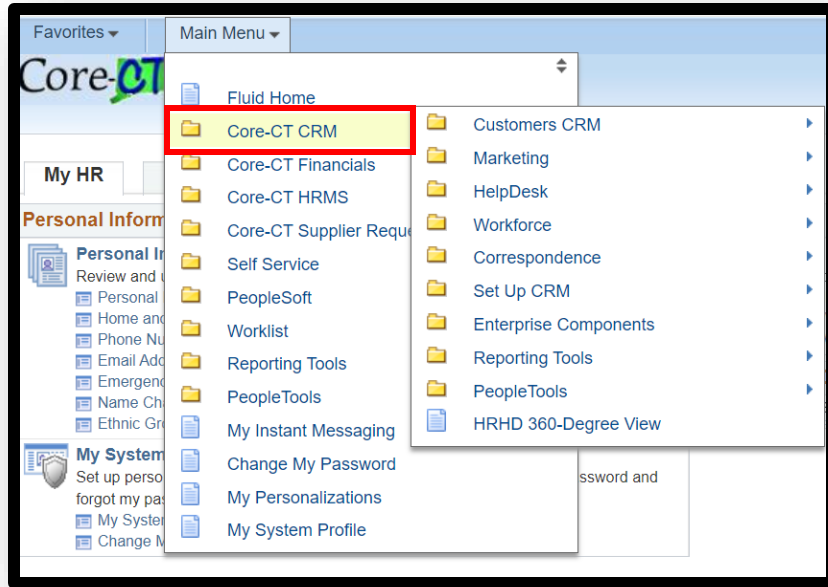
## Global Search

Perform Global Search

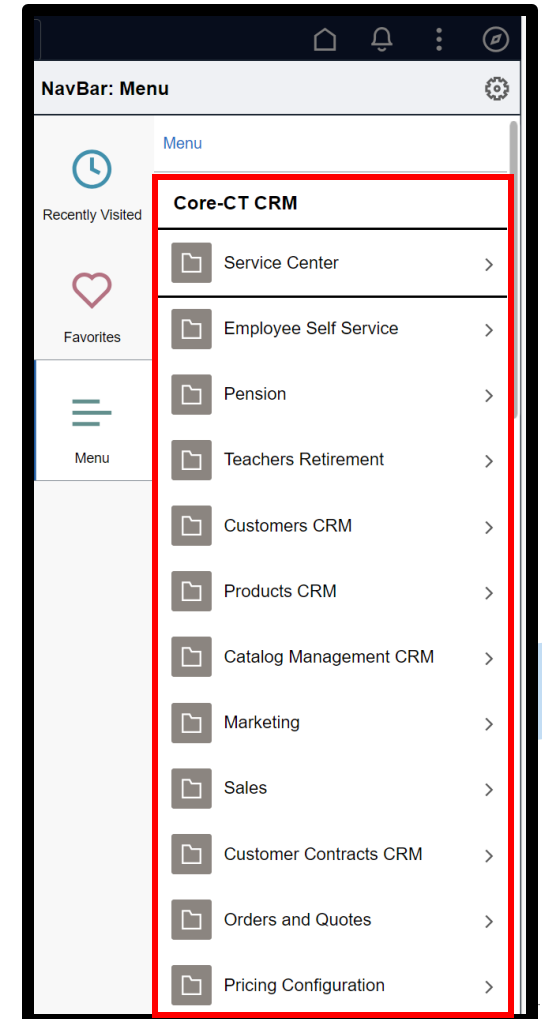
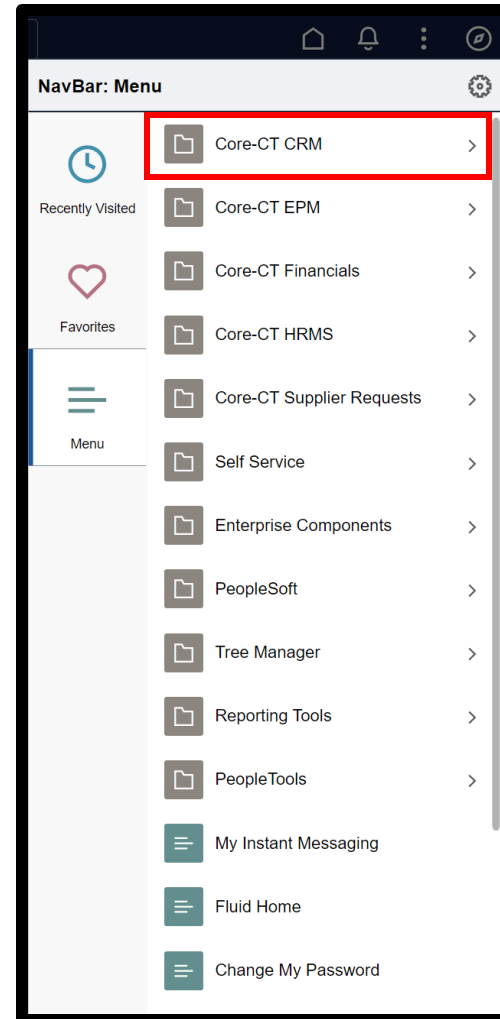
# Fluid CRM: Navigation

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

## PRESENT



## FUTURE

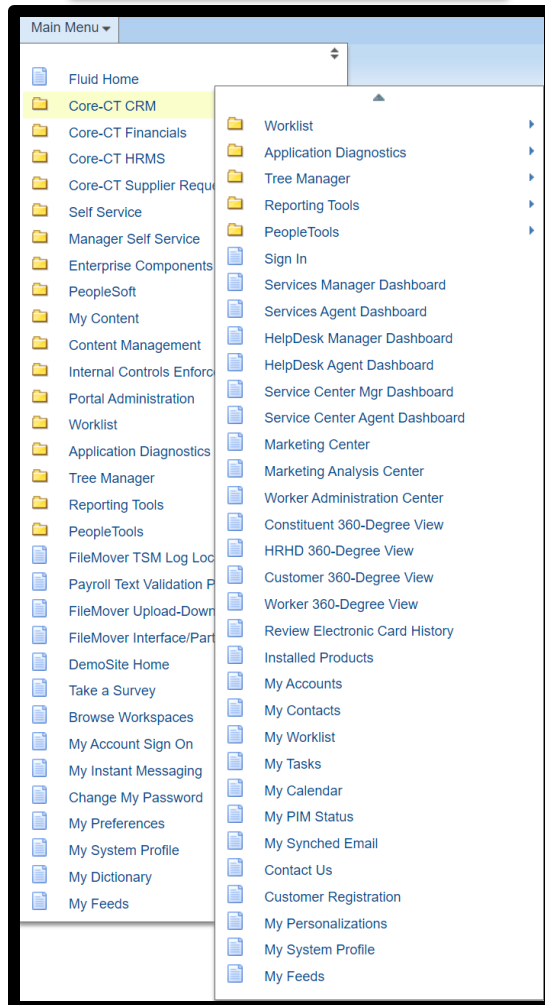




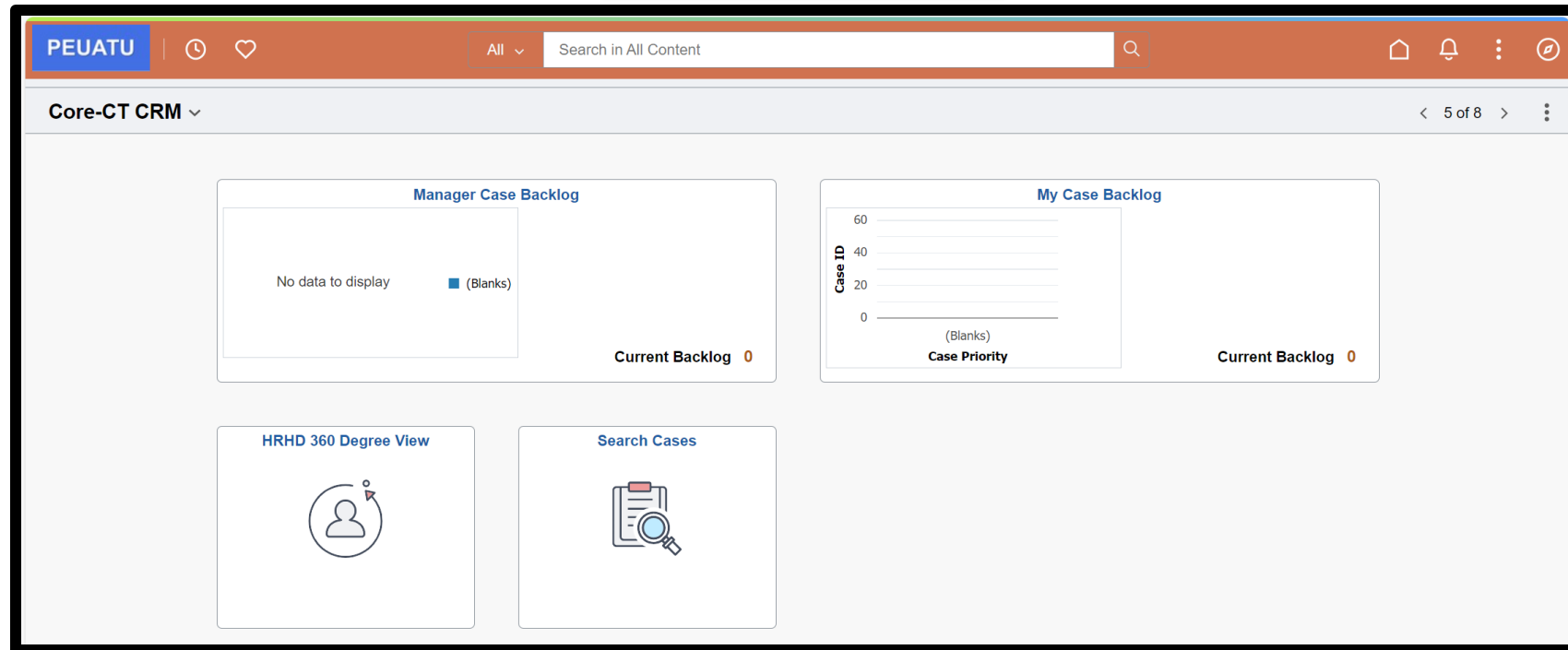
# Fluid CRM: CRM Dashboard

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



## FUTURE

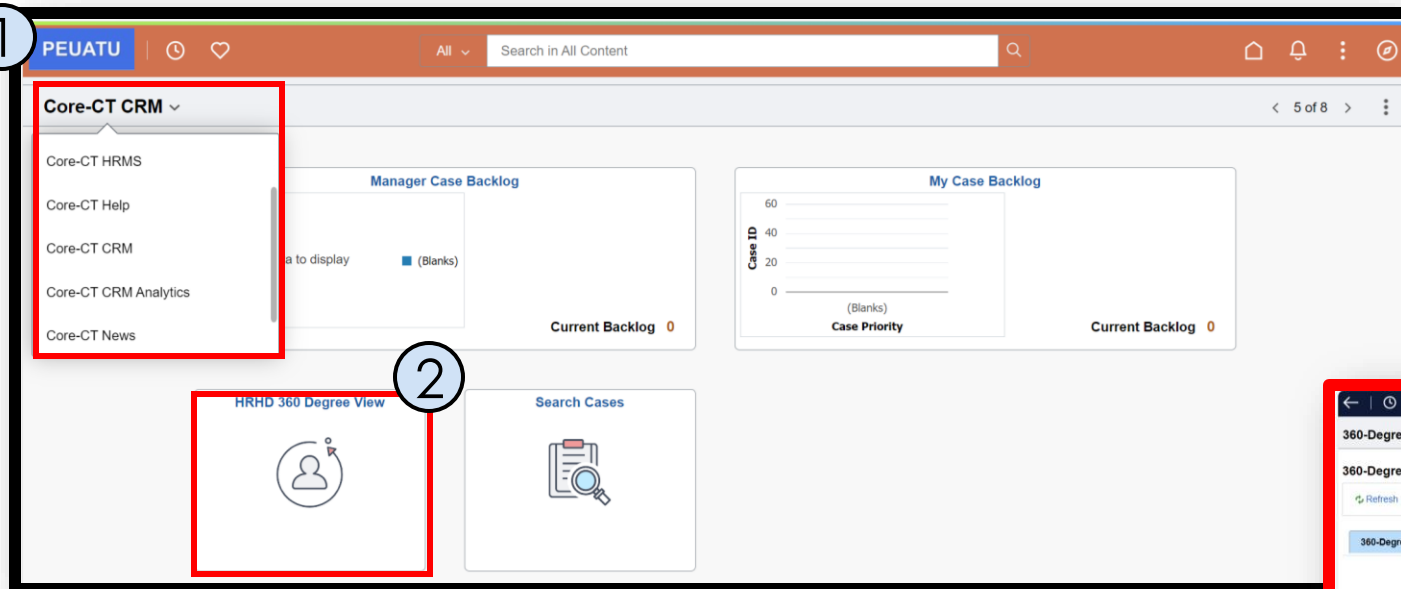


**Note:** Upon the PUM upgrade in October, Tiles are used by CRM users to navigate to different pages in Core-CT Fluid.

# HRHD 360 Degree View: Fluid

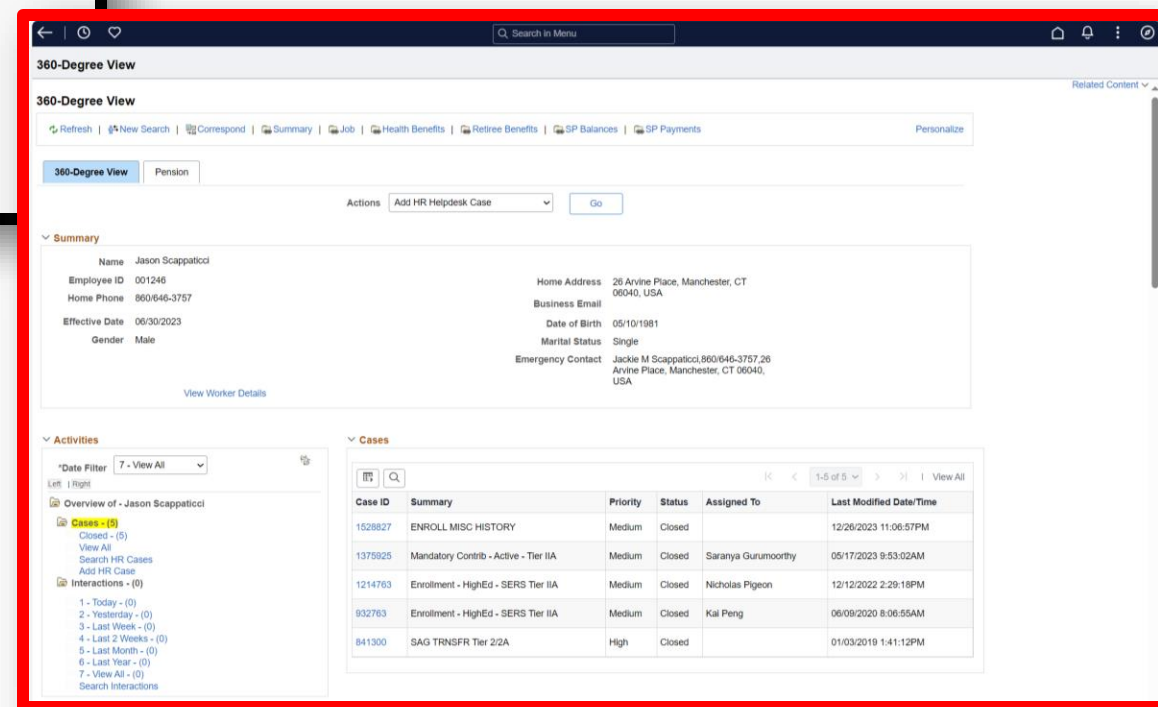
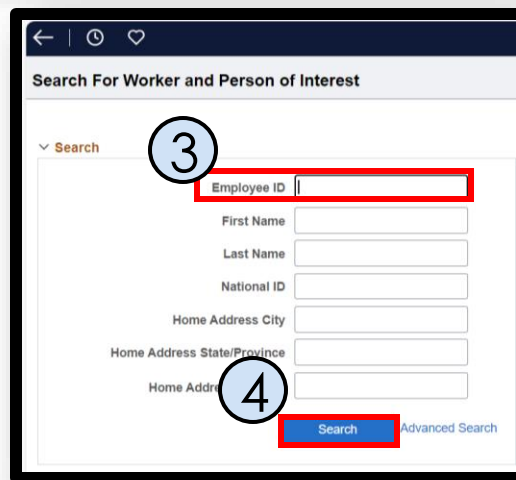
Here's a look at how the HRHD 360 Degree View page is accessed with the PUM Upgrade. This is the view for managers

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



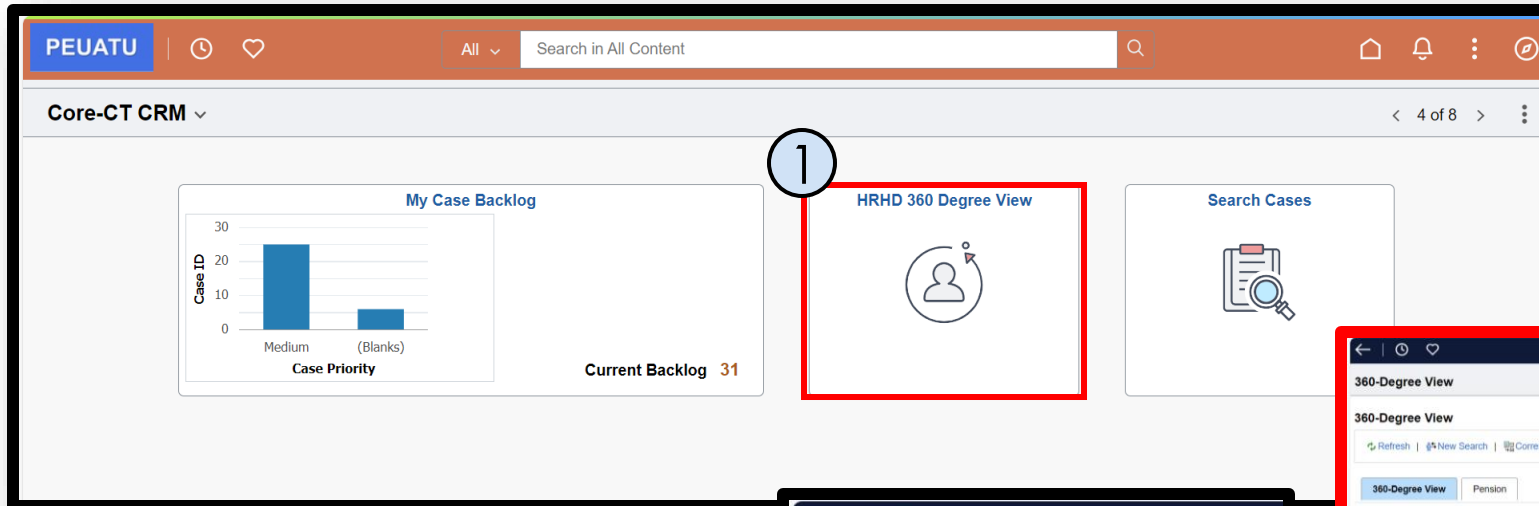
## Key Steps

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**.

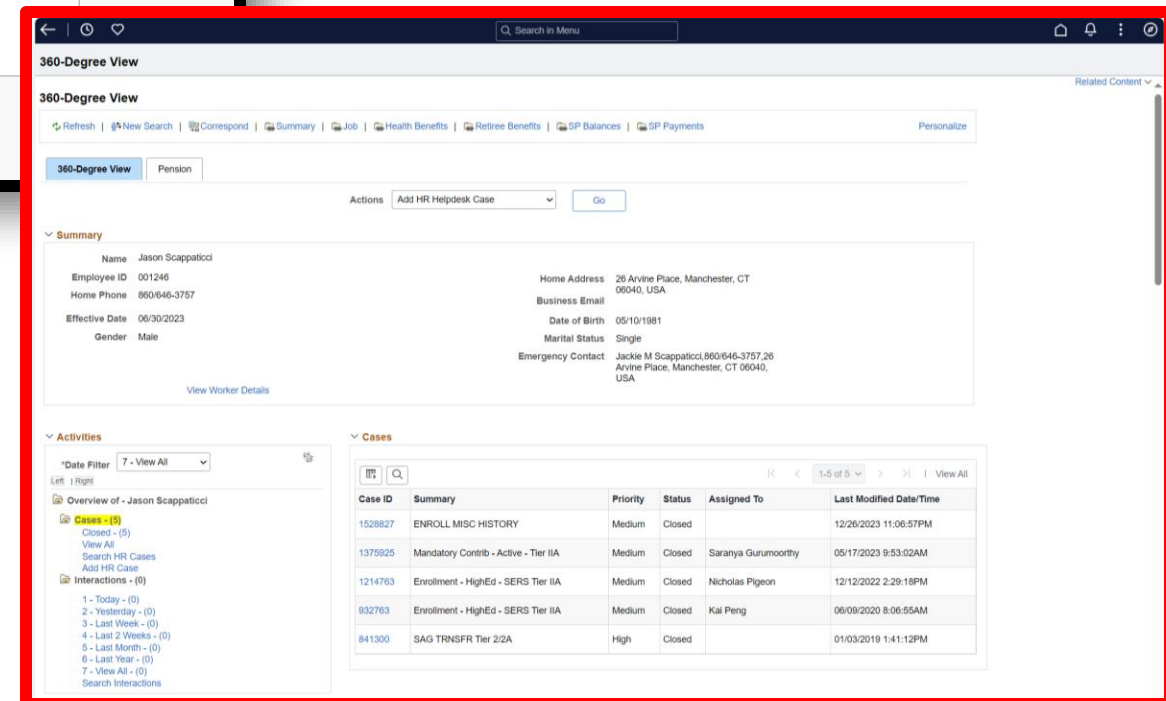


# HRHD 360 Degree View: Fluid

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

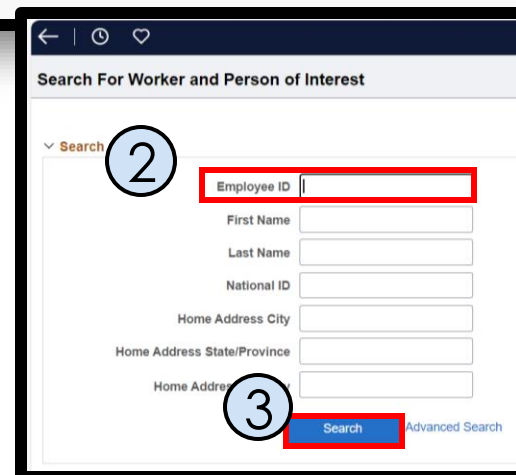


**Note:** CRM users can now reassign and add notes to a case without leaving the page.



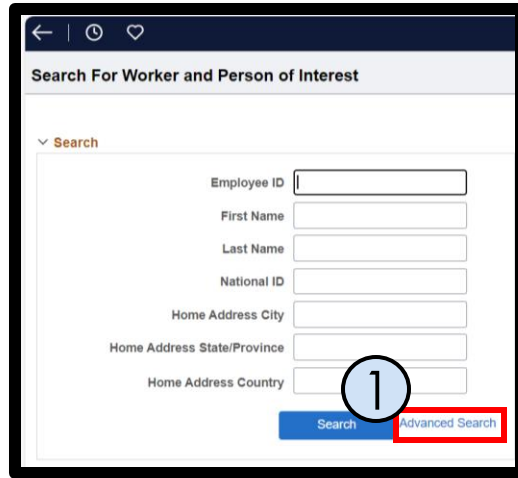
## Key Steps

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



Search For Worker and Person of Interest

Search

Employee ID

First Name

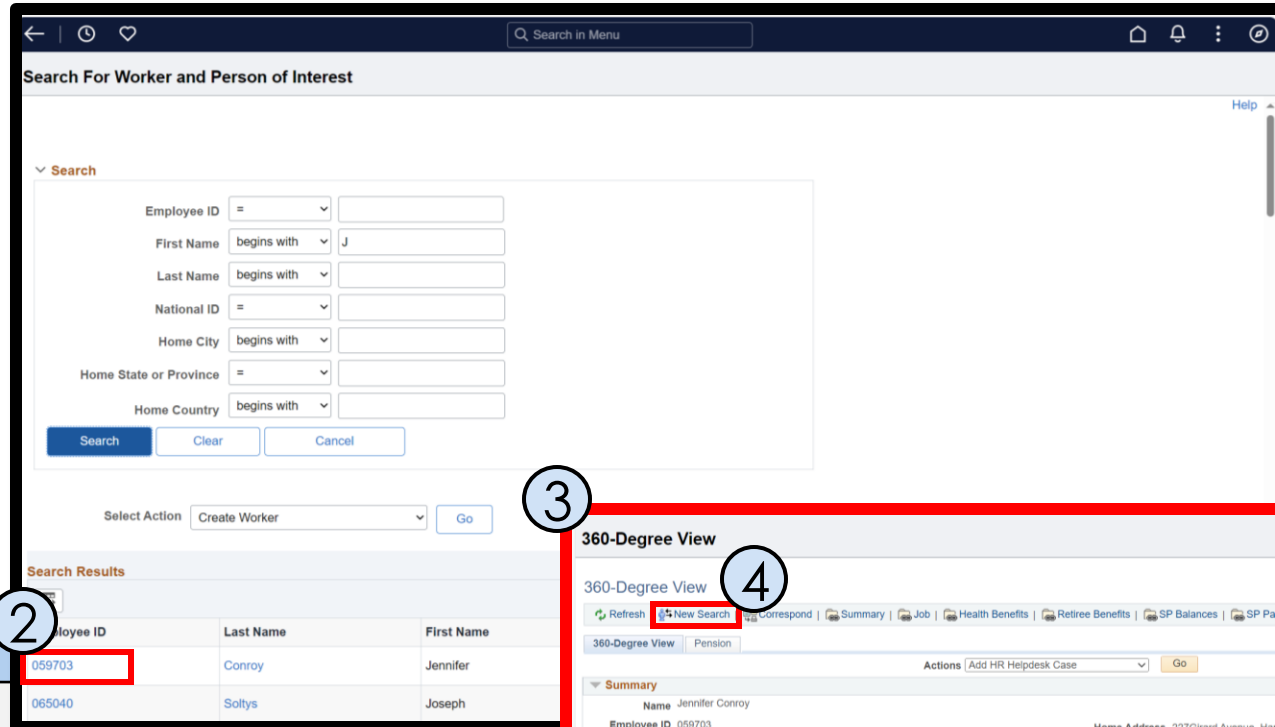
Last Name

National ID

Home Address City

Home Address State/Province

Home Address Country



Search For Worker and Person of Interest

Search

Employee ID =

First Name begins with

Last Name begins with

National ID =

Home City begins with

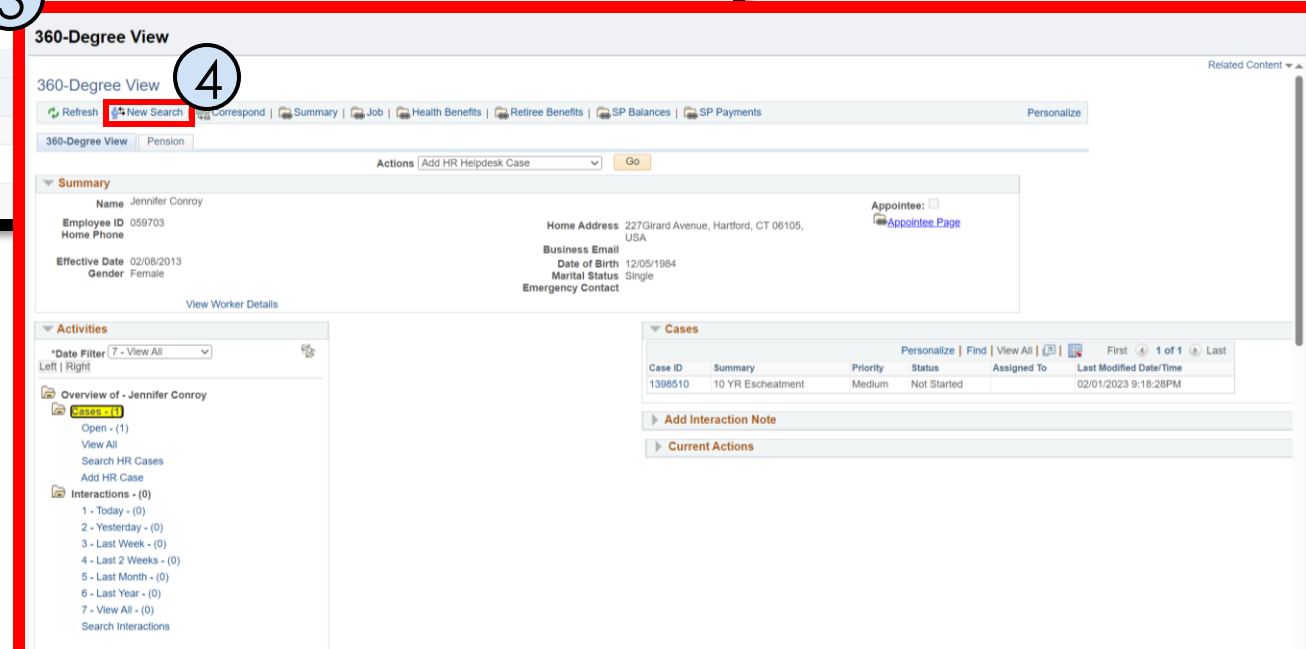
Home State or Province =

Home Country begins with

Select Action

Search Results

Employee ID	Last Name	First Name
059703	Conroy	Jennifer
065040	Soltys	Joseph



360-Degree View

360-Degree View Pension

Actions

Summary

Name Jennifer Conroy

Employee ID 059703

Home Address 227 Girard Avenue, Hartford, CT 06105, USA

Business Email

Effective Date 02/08/2013

Gender Female

Appointee:

Activities

Date Filter 7 - View All

Overview of - Jennifer Conroy

Interactions - (0)

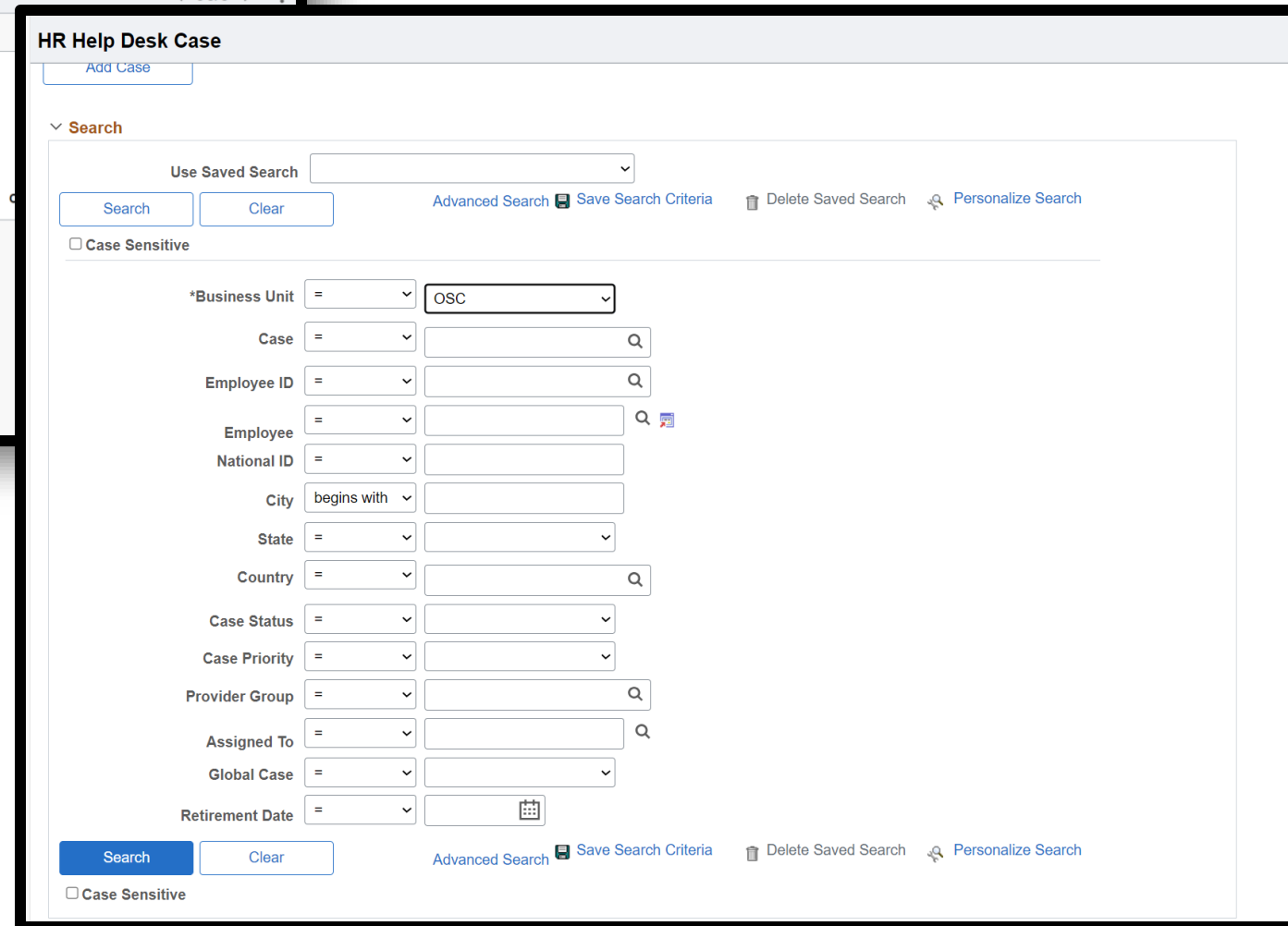
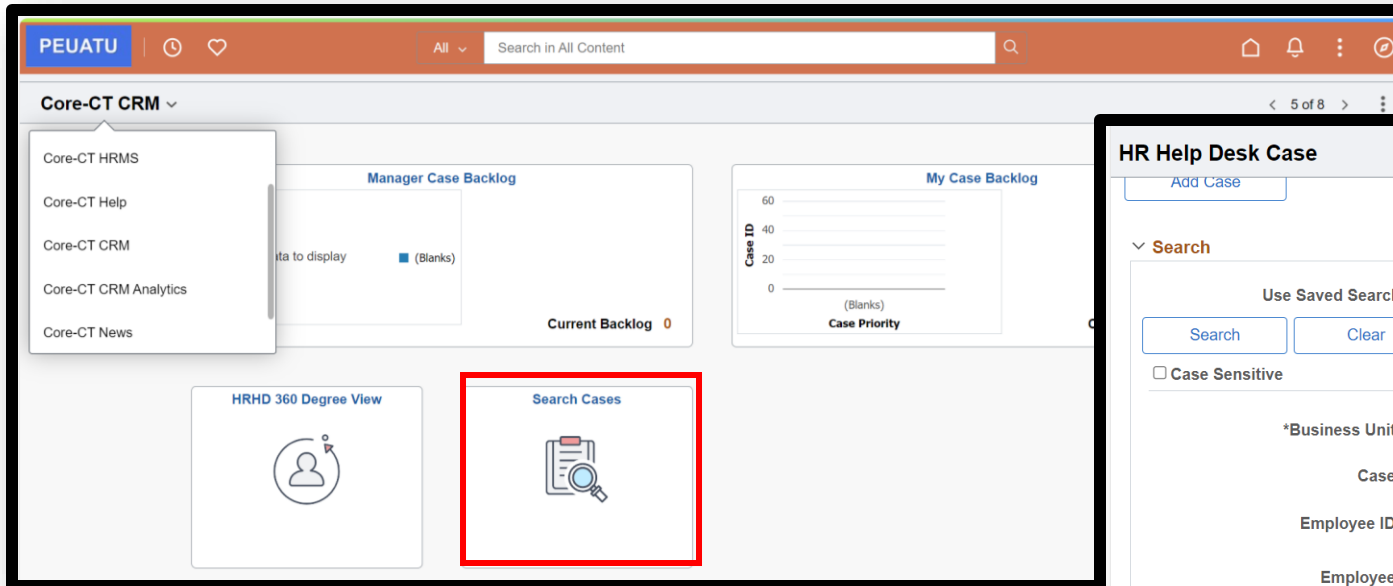
Cases

Case ID	Summary	Priority	Status	Assigned To	Last Modified Date/Time
1398510	10 YR Escheatment	Medium	Not Started		02/01/2023 9:18:28PM

- ### 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

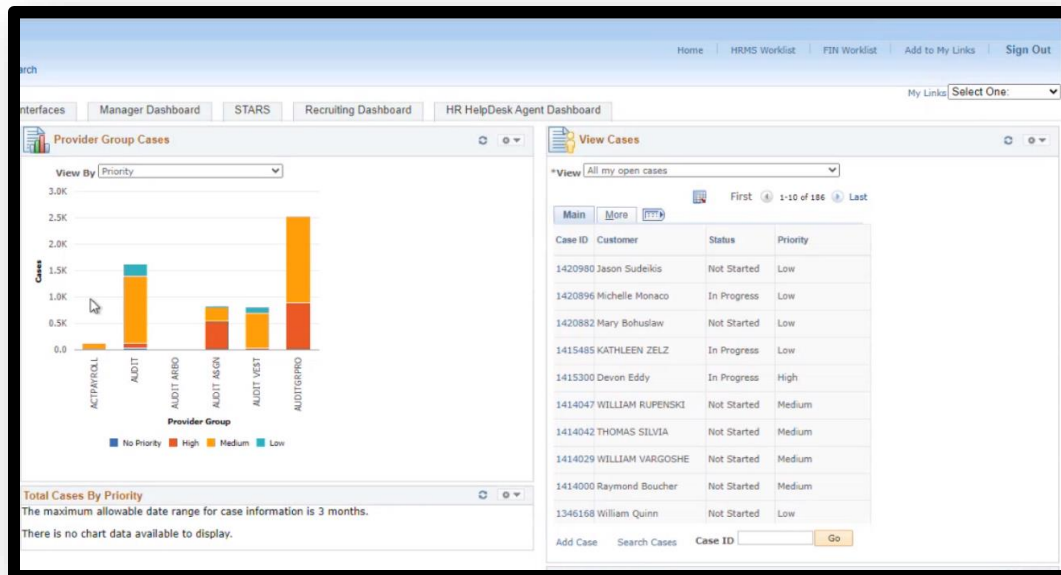
CRM USERS



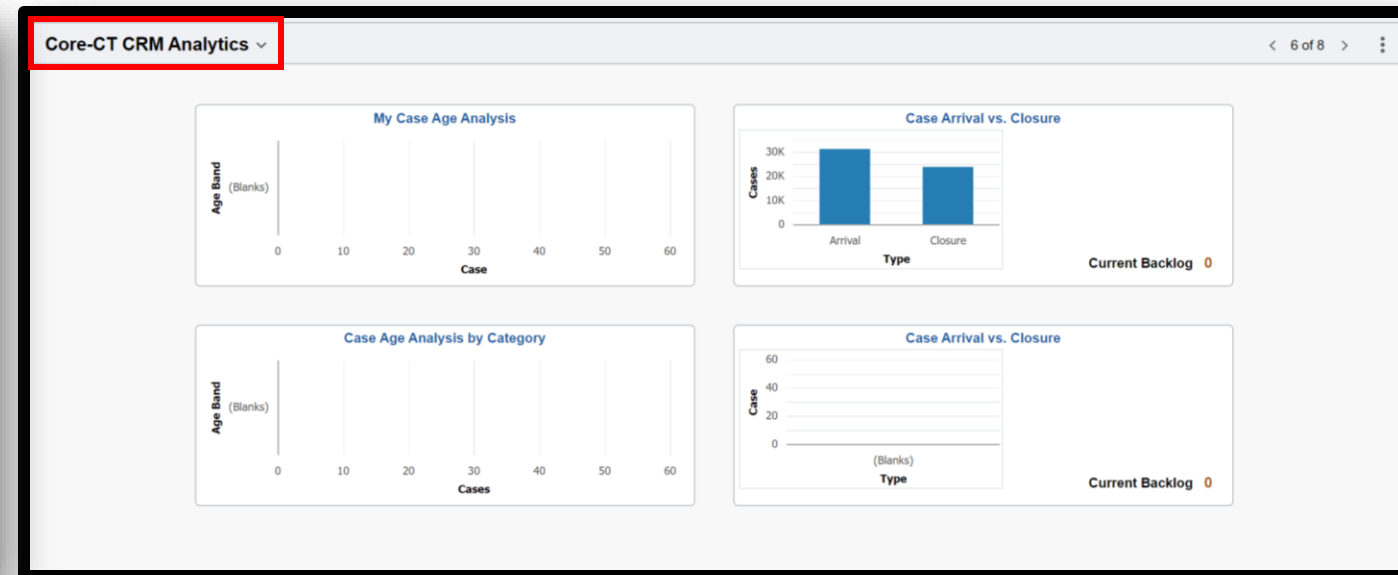
# Fluid CRM: Dashboard Pivot Grids

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



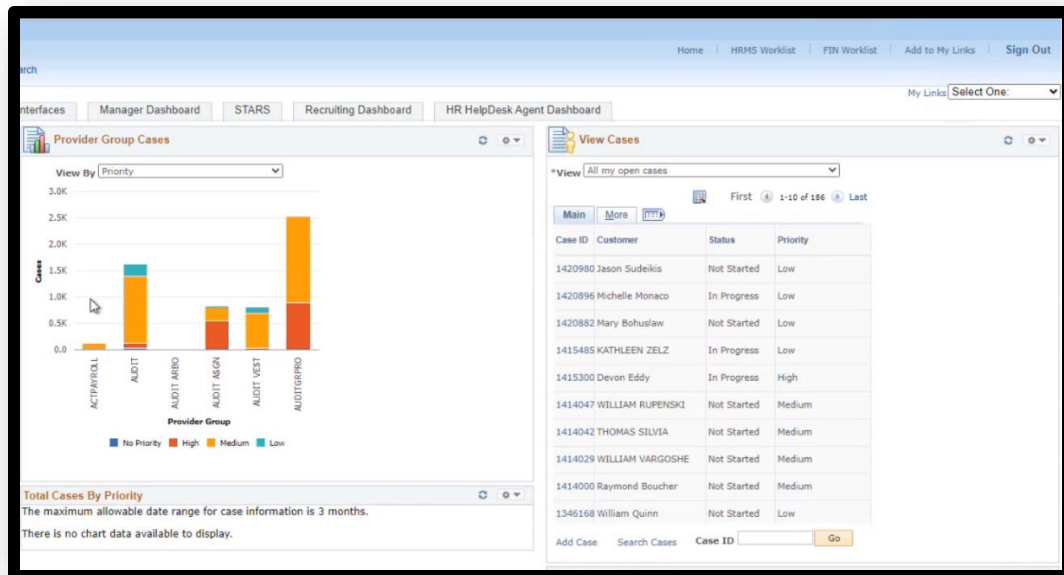
FUTURE



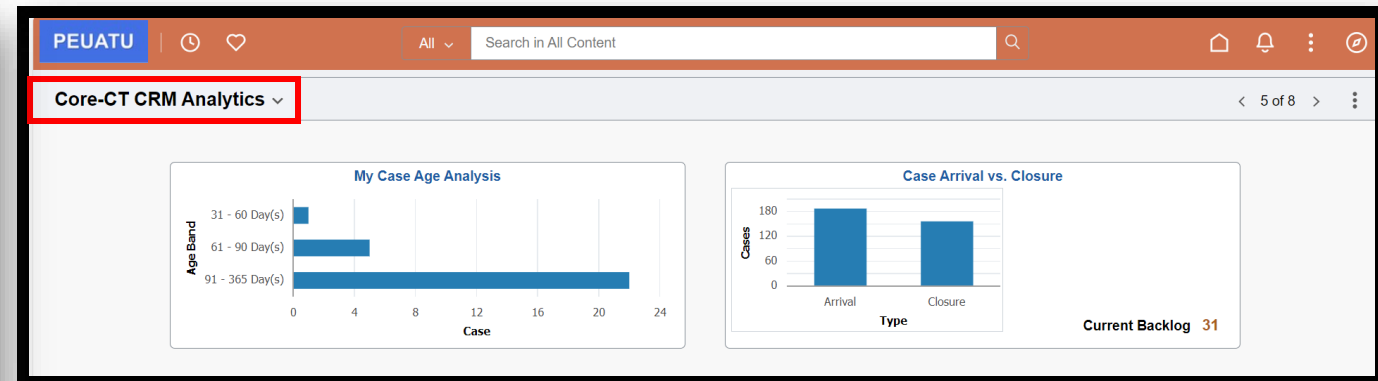
# Fluid CRM: Dashboard Pivot Grids

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



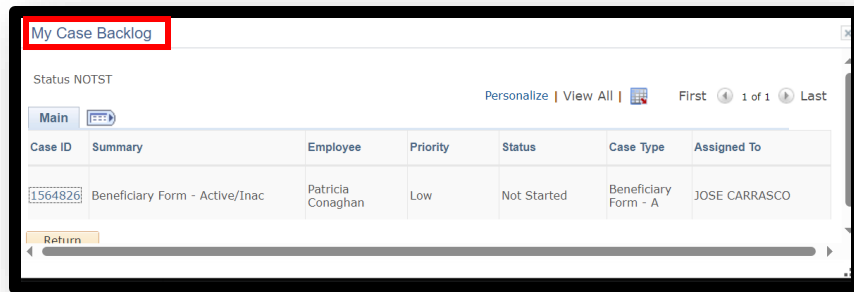
FUTURE



# Fluid CRM: Dashboard Pivot Grids

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

## PRESENT



My Case Backlog

Status NOTST

Personalize | View All | First 1 of 1 Last

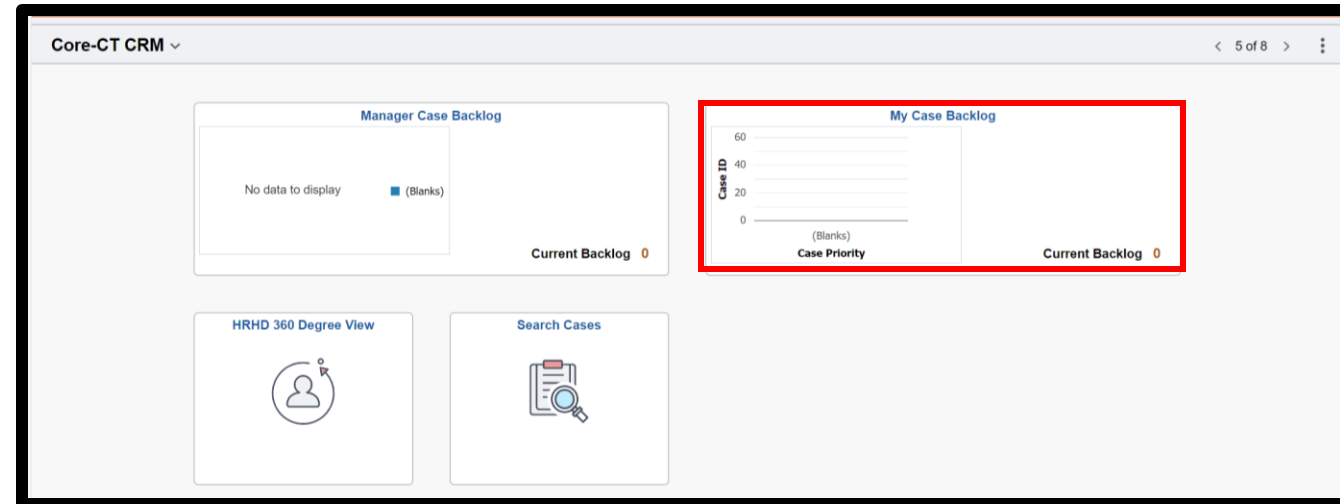
Main

Case ID	Summary	Employee	Priority	Status	Case Type	Assigned To
1564826	Beneficiary Form - Active/Inac	Patricia Conaghan	Low	Not Started	Beneficiary Form - A	JOSE CARRASCO

Return



## FUTURE



Core-CT CRM


< 5 of 8 >

### Manager Case Backlog

No data to display (Blanks)


Current Backlog 0

### My Case Backlog




Current Backlog 0

### HRHD 360 Degree View



### Search Cases



# Fluid CRM: Dashboard Pivot Grids

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

PRESENT

Personalize Manager Case Backlog

**HR Help Desk**

Business Unit

\*Backlog View By

Manager

FUTURE

PEUATU | Search in All Content

Core-CT CRM

5 of 8

**Manager Case Backlog**

No data to display (Blanks) Current Backlog 0

**My Case Backlog**

Case ID: 0-60

(Blanks) Case Priority Current Backlog 0

HRHD 360 Degree View Search Cases

**Manager Case Backlog**

Unit: OSC  
Call Center Manager: 24166

Provider Group:

- Customer Service Center (56208)
- Member Accounts (3337)
- Retiree Health Insurance (2037)
- Counseling Services (1774)
- Miscellaneous (1372)
- Audit Vested Rights (1176)
- Audit - Group Processing (907)
- Purchasing (905)
- Audit (845)
- Retirement Payroll (729)

Case Priority:

- Medium (66482)
- High (3337)

My Team's Current Backlog  
Cases in 'Open' and 'On Hold' status category

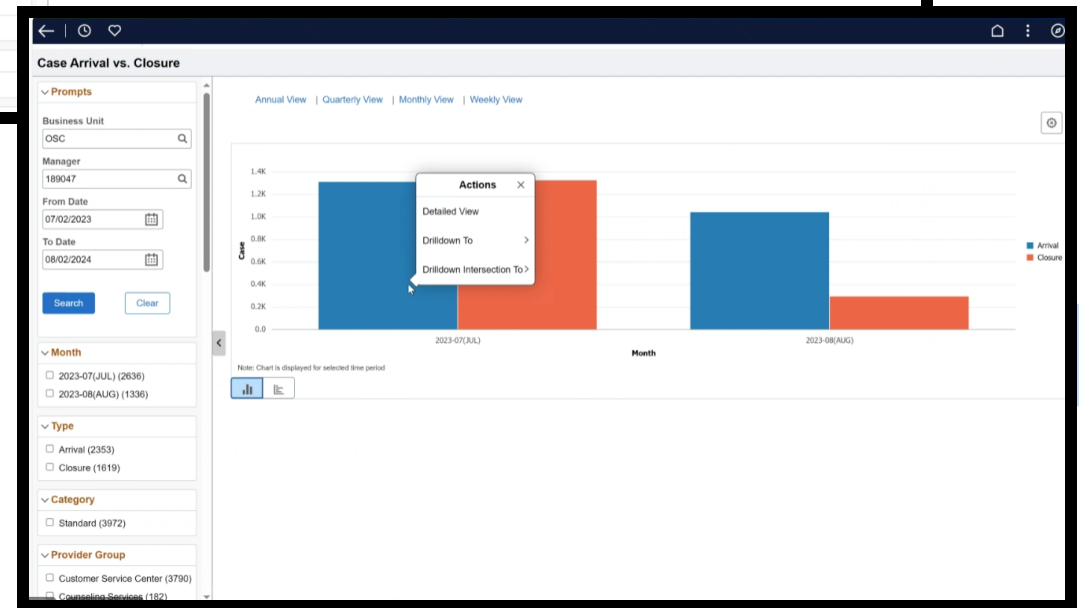
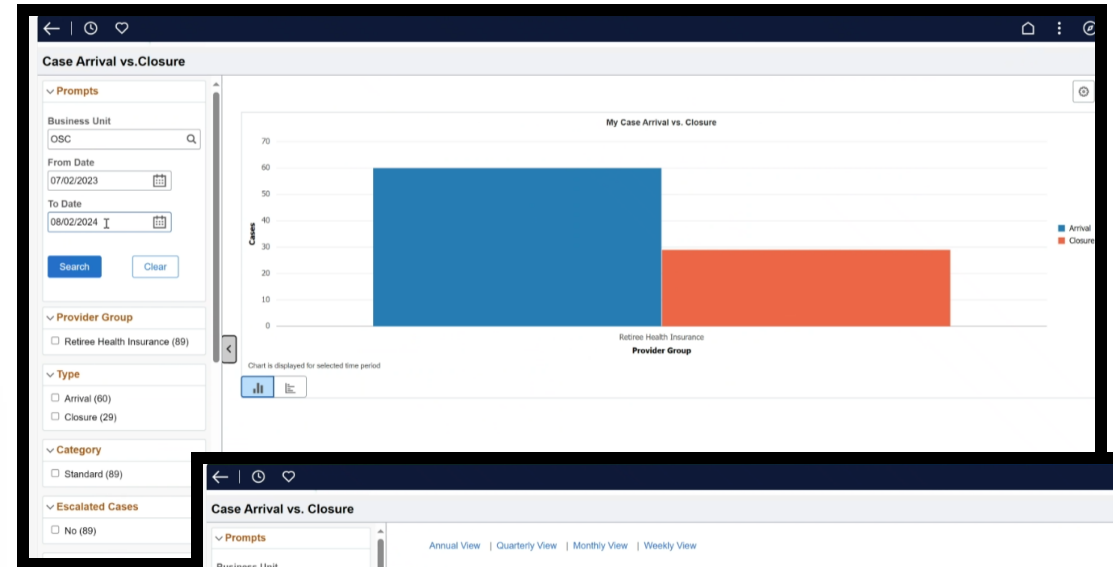
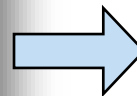
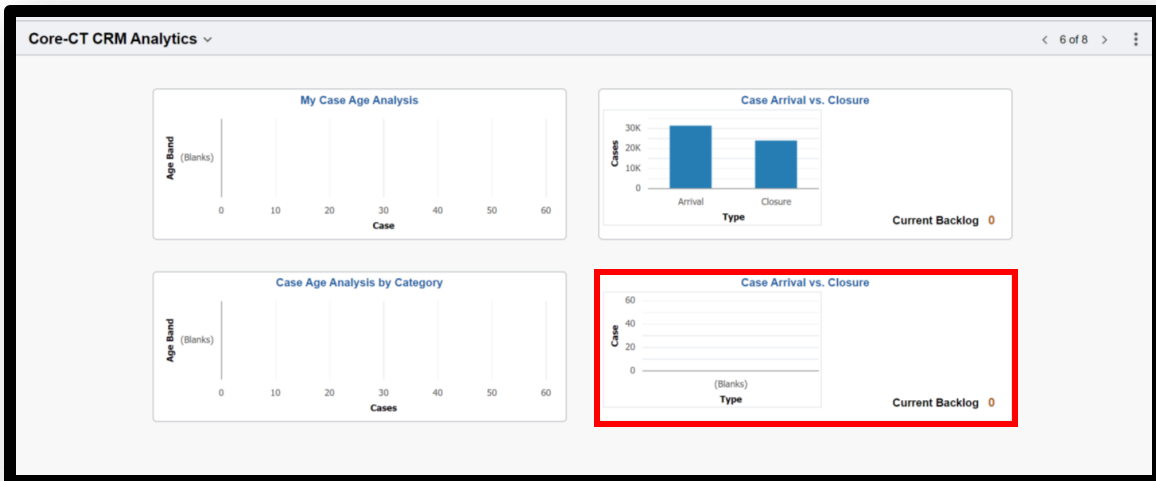
Case ID	Actions	Case Status	Case Priority	Case Summary	Provider Group	Date Created	Retirement Date	Date Last Modified	Assigned Agents	Days open	Source
500817		On Hold	High	ARP to Hybrid Transfer	Audit	2015-10-29		2019-10-25	Paul Piechowicz	3276	Conversion to CRM
501090		On Hold	Medium	ARP to Hybrid Transfer - See Letter Mailed 11-10-2	Miscellaneous	2015-10-29		2023-04-18	Agnieszka Gajowiak	3276	Conversion to CRM
502648		Not Started	High	Finalize Disability 02/01/2004	Audit	2015-10-29	2004-02-01	2021-08-14	Adam Wilder	3276	Conversion to CRM
502760		Not Started	High	Finalize Disability 05/01/2003	Audit	2015-10-29	2003-05-01	2021-08-13	Adam Wilder	3276	Conversion to CRM





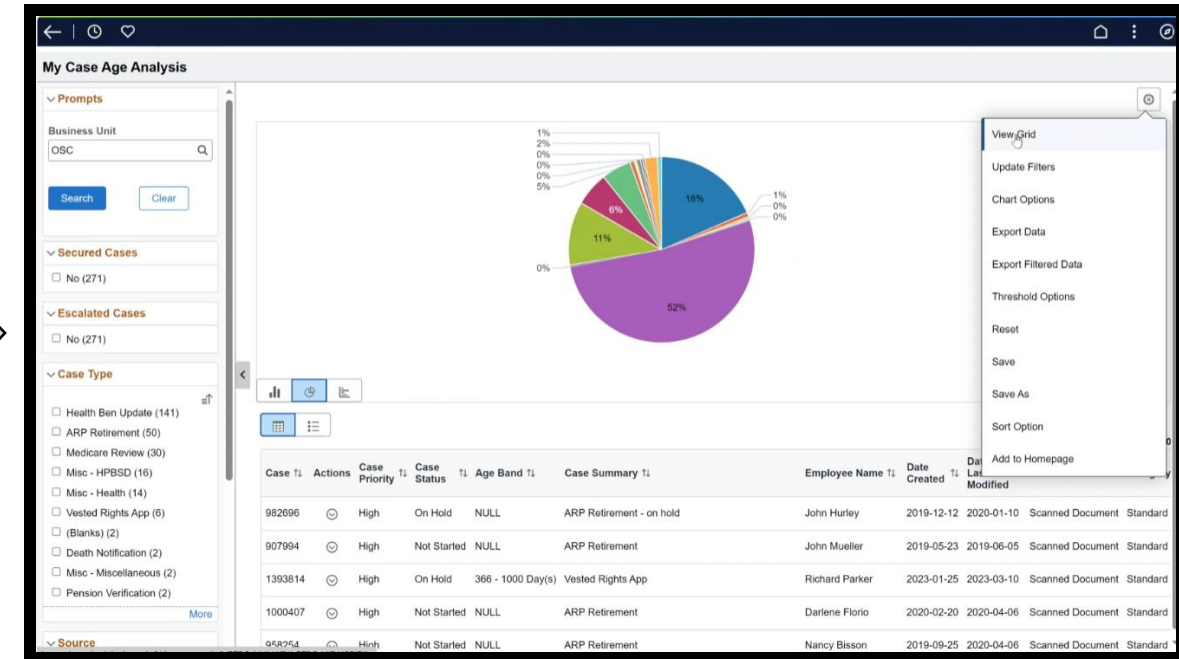
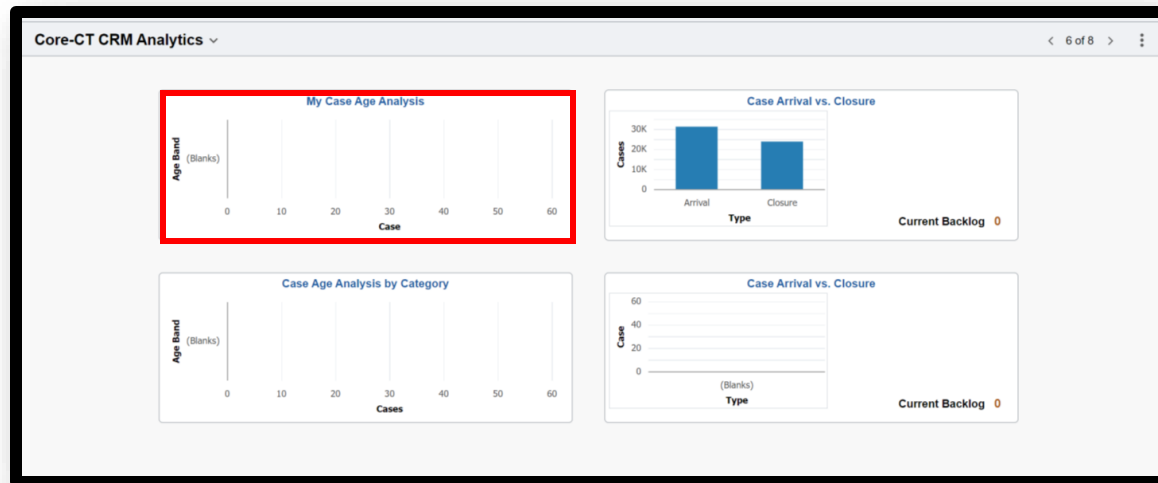
# Fluid CRM: Case Arrival vs. Closure

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

Oracle HCM Job page (Present State)

Navigation Tabs: Work Location, Job Information, Job Labor, Payroll, Salary Plan, Compensation, Higher Ed Employment, Service Calculation Dates, Work Study Balances

Employee: David Velez, Empl ID: 021909

Work Location Details:

- Effective Date: 01/04/2017
- Effective Sequence: 0
- HR Status: Inactive
- Payroll Status: Terminated
- Position Number: 00065835
- Position Entry Date: 01/10/2005
- Regulatory Region: USA
- Company: CT
- Business Unit: LEGMN
- Department: OLM10000
- Department Entry Date: 01/10/2005
- Location: OLM064010
- Establishment ID: OLM001
- Date Created: 01/13/2017
- Last Start Date: 01/10/2005
- Termination Date: 01/03/2017
- Expected Job End Date: [Blank]
- Last Date Worked: 01/03/2017

## FUTURE

Oracle HCM Job page (Future State)

Job Details: 001507-0 - Employee, SU-Assistant

Effective Date: 12/19/2008, Sequence: 0

Action: Termination, Reason: Resigned in Good Standing

Expand All

Work Location Details:

- HR Status: Inactive
- Job Indicator: Secondary Job
- Payroll Status: Terminated, Status: Completed
- Position Number: 00077681 SU-Assistant
- Position Entry Date: 05/23/2008
- Regulatory Region: USA, USA Regulatory Region
- Business Unit: UNVS, Colleges and Universities
- Department: CSU84000, Central CSU
- Location: CSU089050
- Department Entry Date: 11/14/2003
- Establishment ID: CSU002, Central Conn State Univ
- Date Created: 01/14/2009
- Last Start Date: 11/14/2003
- Termination Date: 12/19/2008
- Expected Job End Date: [Blank]
- Override Last Date Worked: No
- Last Date Worked: 12/19/2008

Expandable Sections (Red Box):

- Job Information
- Labor Information
- Salary and Compensation
- Payroll
- Employment Data
- Benefit Program
- Additional Job Info
- Payroll Distribution-Higher Ed Employment-Service Calc Dates
- Work Study Balances-Stipend and Course

## 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

The screenshot shows the 'Modify a Person' page in Oracle HCM. At the top, there are three tabs: 'Biographical Details', 'Contact Information', and 'Regional', which are highlighted with a red box. Below the tabs, the page displays personal information for David Velez, including name, effective date, and biographic information. A large blue arrow points from this page towards the future version.

The screenshot shows the 'Modify Person' page in the future version. The tabs from the current version are now listed in a sidebar on the left, highlighted with a red box. The main content area shows 'Step 1 of 2: Person Data' with sections for 'Person Details', 'Contact Information', 'Regional', 'War Service', and 'Validation'. The 'War Service' section is expanded, showing fields for Military Status, Effective Date, Sequence, Service Begin Date, and Service End Date.

## 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.



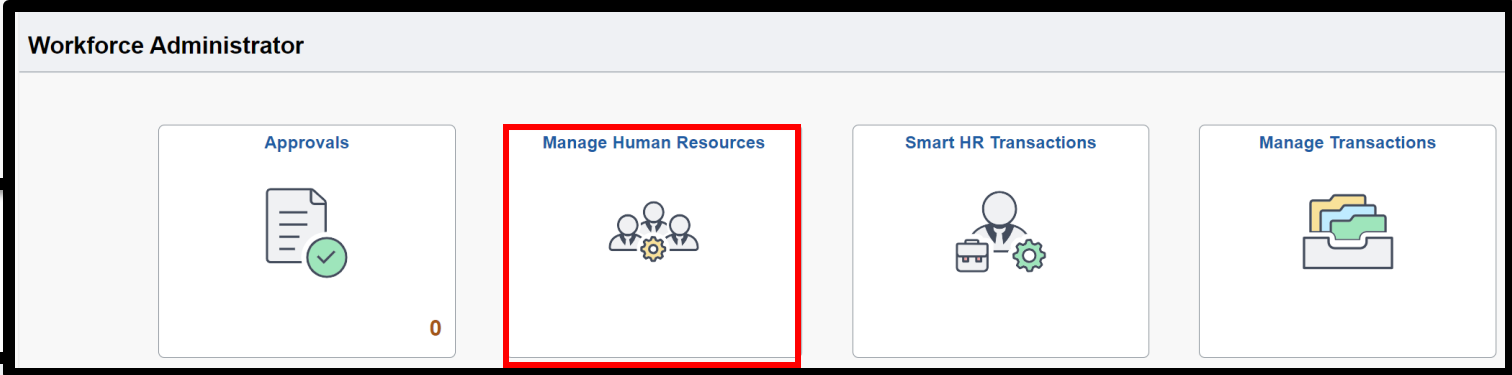
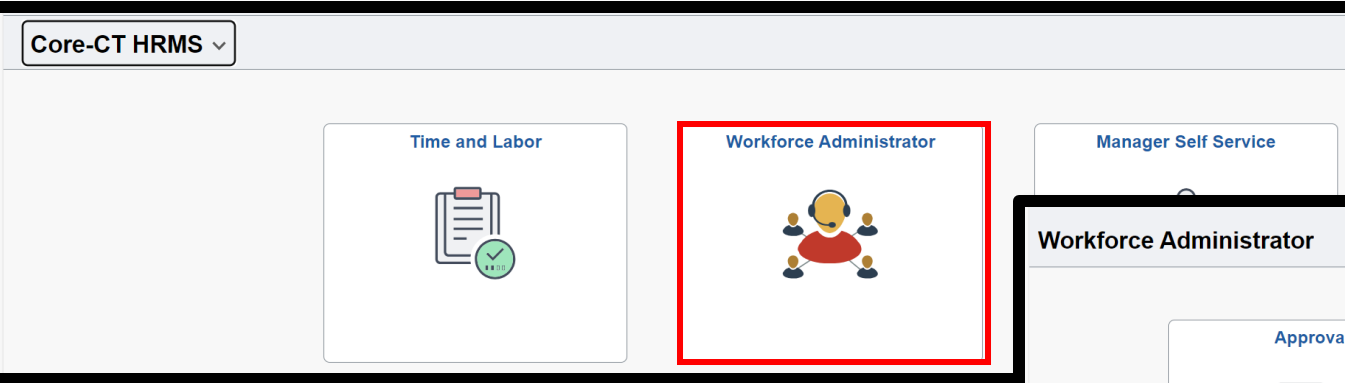


# ADD EMPLOYMENT INSTANCE



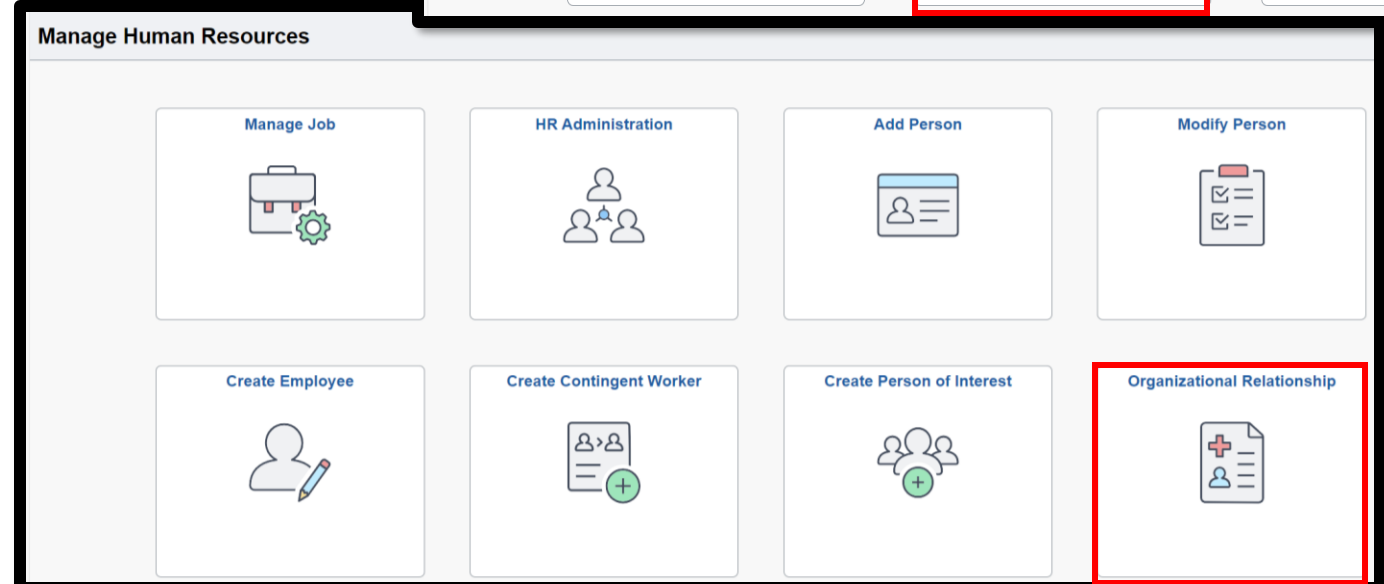
# HCM Add Organizational Relationship

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.

**Organizational Relationship**

**Search Existing**

Search Criteria

My Saved Searches

Empl ID begins with

Name begins with

First Name begins with DONNA

Last Name begins with BRAGA

Second Last Name begins with

Middle Name begins with

Search Clear Save Search

**Organizational Relationship**

**Donna Braga**  
Core-CT TechBusTeamManager

Add Organizational Relationship

Relationship - Employee

Instance Nbr 0

HR Status Active Payroll Status Active

Last Hire Date 12/21/2018 Termination Date

Add Additional Assignment

**Assignments**

Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date
0	Home	06/30/2023	AGNCY	OSC15000	Active	12/21/2018
Primary Job	Home	06/30/2023	Executive Branch Agency Default	Off of State Comptroller	Active	

# 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.

The screenshot displays the 'Organizational Relationship' page for Donna Braga, Core-CT TechBusTeamManager. A modal window titled 'Add Organizational Relationship' is open, showing the following fields:

- Relationship - Employee** (expanded)
- Instance Nbr: 0
- HR Status: Active
- Last Hire Date: 12/21/2018
- Assignments** table:

Employment Record / Job Indicator	Home/Hos
0	Home
Primary Job	
- Empl ID: 011045
- \*Empl Record: 1
- \*Effective Date: 09/05/2024
- Action: Hire
- Action Reason: (dropdown menu)

The modal also features 'Cancel' and 'Continue' buttons. The 'Employee' radio button is selected and highlighted with a red box.