



Core-CT FIN PUM Delta User Group

AR/BI/GL/GRT/PC

November 19, 2024

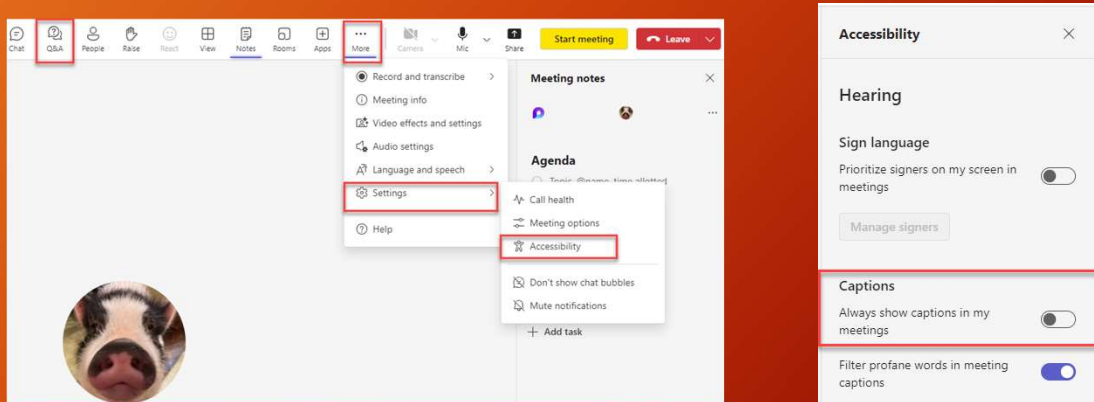


Welcome

Donna Braga

Welcome - Accessibility

- We have now enabled the Q&A feature for questions.
- Accessibility Capability is available on Webinar, it must be turned on by users individually.



We have now enabled the Q&A feature in Teams for questions.

Accessibility can be turned on by clicking on More, then Settings, then Accessibility. Once in Accessibility, you can turn on Captions.

Welcome

We will be here to guide you down this new path.



Agenda

- Welcome
- Navigation & Approvals
- AR
- BI
- GL
- GRT
- PC/CC
- EPM/STARS
- Security
- Help Desk
- Closing

Donna Braga
Brienne McKenna
Chris Marchese
Agnes Kowalewska
James Klaben
Vanessa Hoang
Vanessa Hoang
Wendy Monk
Dustin Guarino
Shanon Reutter
Brienne McKenna



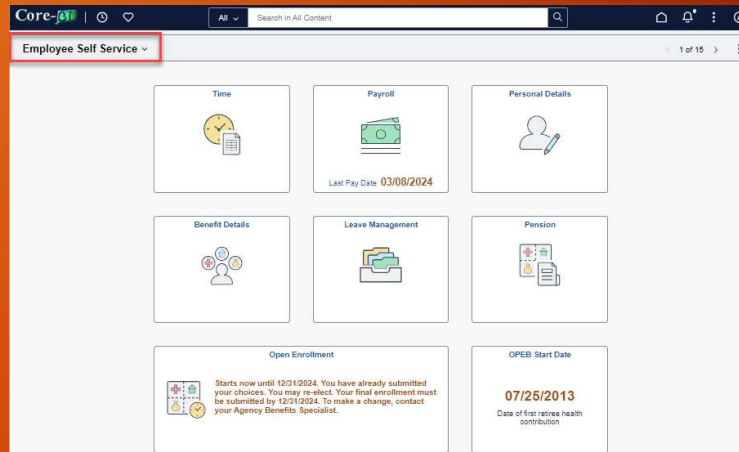
Navigation Agenda

- Navigation Home Page
- Navigation - Tiles
- Navigation - Nav Bar Menu
- Nav Bar Menu - Alphabetize
- Nav Bar Menu - Collections



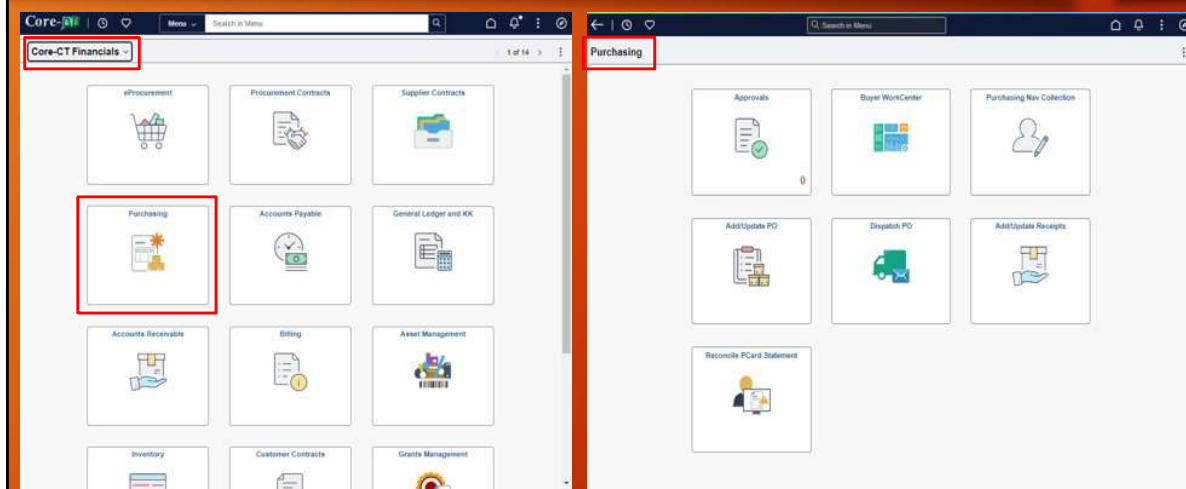
Welcome to the Navigation section.

Navigation - Home Page



When you log into Core-CT you will now be directed to a homepage.
Select the homepage related to your task.
In this next example we will navigate to Core-CT Financials.

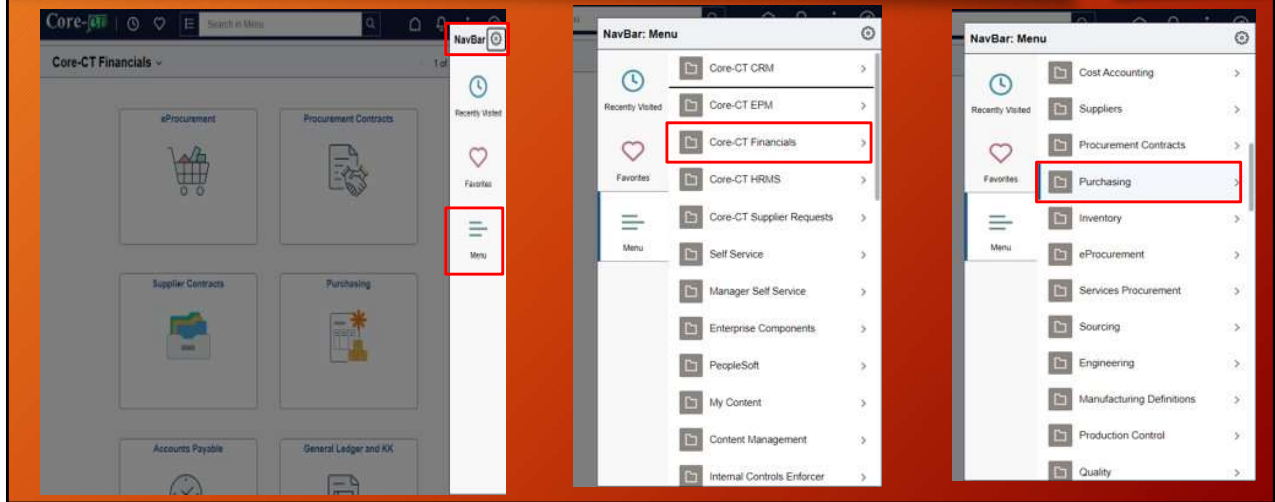
Navigation - Tiles



In the previous slide, Core-CT Financials was selected. Now, In this example above, we use Purchasing. Clicking on the purchasing tile will direct you to the purchasing homepage, made up of more security related tiles.

Tiles are high action boxes located on the home pages based on your roles.

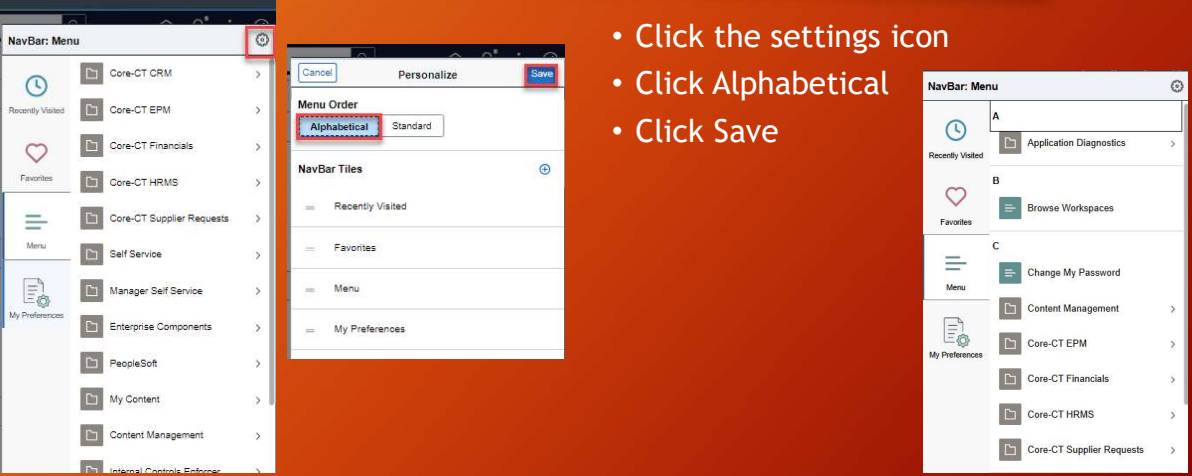
Navigation - Nav Bar Menu



On the top right you will see a circle with an arrow in it. This is the NEW! Navigation Bar that replaces the previous Navigation Drop Down Menu.

When you select the Nav Bar you can drill into modules like you normally have. Also, The Bread Crumbs are now located inside the menu navigation, we will see this screen shot in a later slide.

Nav Bar Menu - Alphabetize



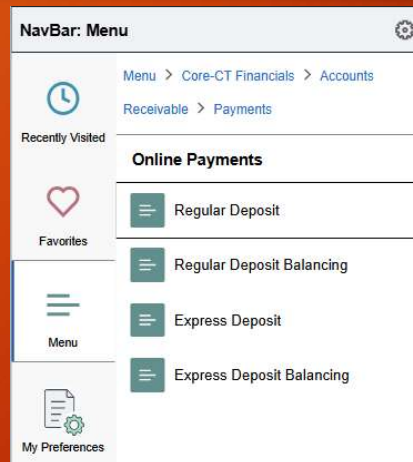
- Click the settings icon
- Click Alphabetical
- Click Save

I know in the past some users like the option to alphabetize their menu. Especially if you work in the Accounts Payable Module 😊 This is still an option.

All you have to do is click the settings wheel icon, located inside the Nav Bar and select alphabetical and click save.

Nav Bar Menu - Bread Crumbs

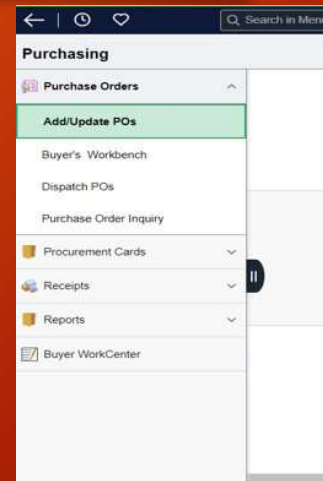
- We still have bread crumbs as we do today located at the top of the Nav Bar Menu



As mentioned in a previous slide, the bread crumbs/menu navigation is located at the top of the Nav Bar.

Navigation - Collections

- Collections is another way of navigating.
- The Collection menu lists the most used functions in a particular module.
- Collections is compared to the currently used workcenters.



Navigation Collections is a new functionality of high action processes for your module. It will help your daily tasks run smoother because you are in a one stop shop.

Although it has not yet been delivered to all modules, we anticipate rolling it out in the future for those who will not see it with this upgrade. The functionality is very similar to WorkCenters, and it will most like be based on personal preference which you choose.

Approvals Agenda

- Approvals - Fluid
- Notifications - Bell
- Notifications - Settings
- Notifications - Actions/Alerts



Approvals - Fluid

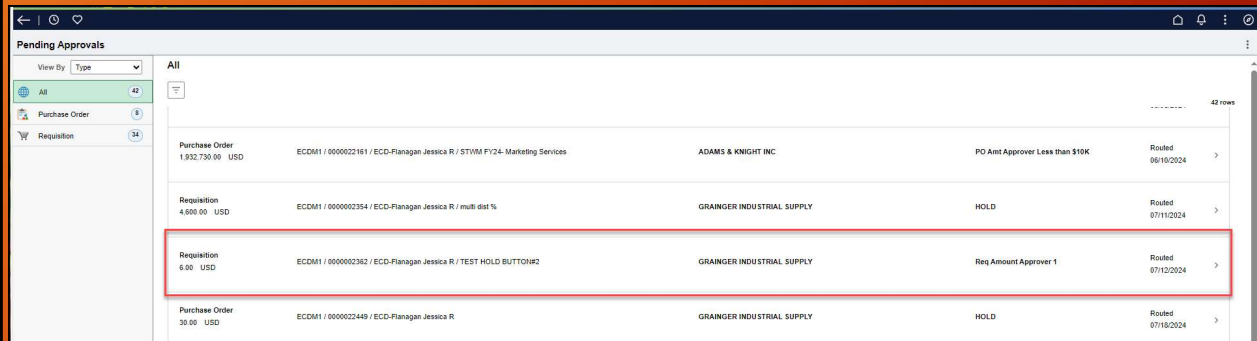
- Approvals are now through the Fluid Approval Tile depending on your module.
- The modules with Approval Tiles are eProcurement, Purchasing, Accounts Payable, Asset Management, Grant Management and Security.



Example: Navigate to Core-CT Financials and click the Purchasing tile and then the approvals tile. This will bring you to the new Pending approvals page.

Approvals - Fluid

- This is the Pending Approvals page that the previous tile brings you to.



The screenshot shows a web application interface for 'Pending Approvals'. It features a sidebar on the left with filters for 'All' (42), 'Purchase Order' (8), and 'Requisition' (24). The main area displays a table with the following data:

Type	Amount	Vendor	Status	Routed Date
Purchase Order	1,932,730.00 USD	ADAMS & KNIGHT INC	PO Amt Approver Less than \$10K	Routed 06/10/2024
Requisition	4,800.00 USD	GRAINGER INDUSTRIAL SUPPLY	HOLD	Routed 07/11/2024
Requisition	6.00 USD	GRAINGER INDUSTRIAL SUPPLY	Req Amount Approver 1	Routed 07/12/2024
Purchase Order	30.00 USD	GRAINGER INDUSTRIAL SUPPLY	HOLD	Routed 07/15/2024

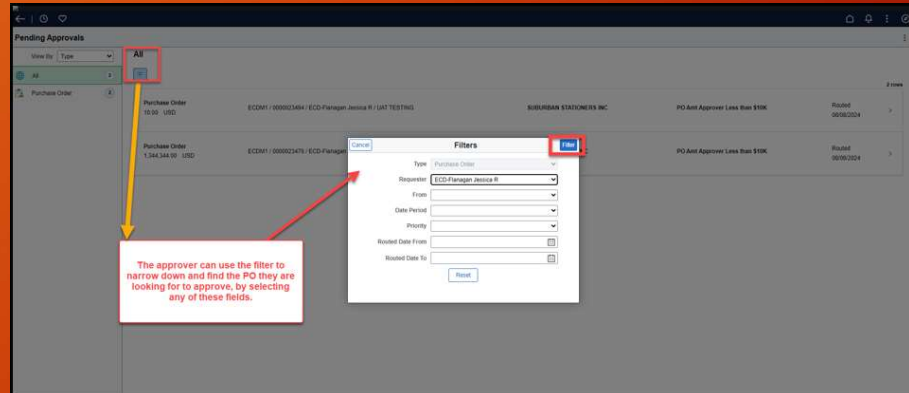
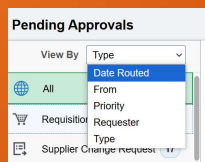
The new pending approvals page will capture all approval related documents waiting approval.

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

The biggest change here is that this replaces the worklist.

Approvals - Fluid

- Approvers may now use the filter options to narrow down this list when looking for a transaction they are need to approve.

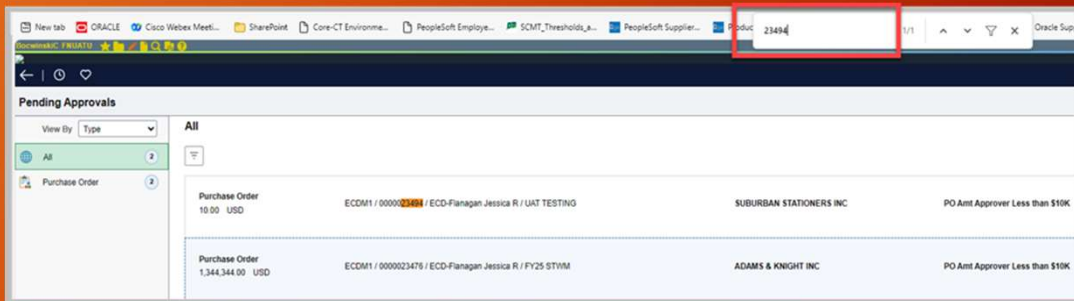


The pending approvals page will capture all of the approvals you may have in this one interface. Depending on your roles it is possible to see ePro transactions, and PO transactions. In order to help filter these transaction there is a filter box option at the top of the page. Here you can sort by requestor, date transaction id etc.

In this example on the left-hand side of the pending approval page it separates documents by type (or Module). You have the option to use Date Routed, From, Priority, Requester and Type.

Approvals - Fluid

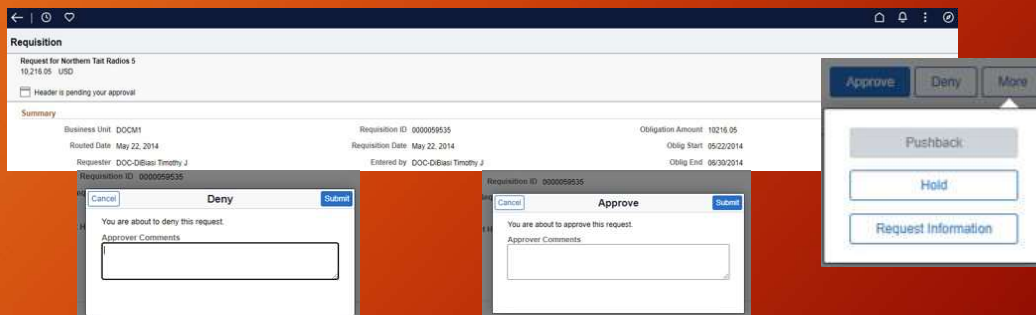
- A great tip is the you can click CTRL + F and search on a specific item number.
- The results with highlight in orange.



If you have a long list of approvals and need a specific document number a great tip is to click CTRL + F and enter the number.

Approvals - Fluid

- Once a transaction is selected, you have 5 options depending on your module...Approve, Deny, Pushback, Hold, and Request Information
- Once the approve button is clicked you have the option to add Comments, any other action comments are mandatory.



Comments are mandatory for denials, pushback, hold and request information.

Each module will discuss this more in depth in their individual section.

Notifications - Bell

- Approvals can also be managed via the Notification Bell.



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Pending Approvals

View By: Type

- All 5
- Purchase Order 1
- Requisition 4

All

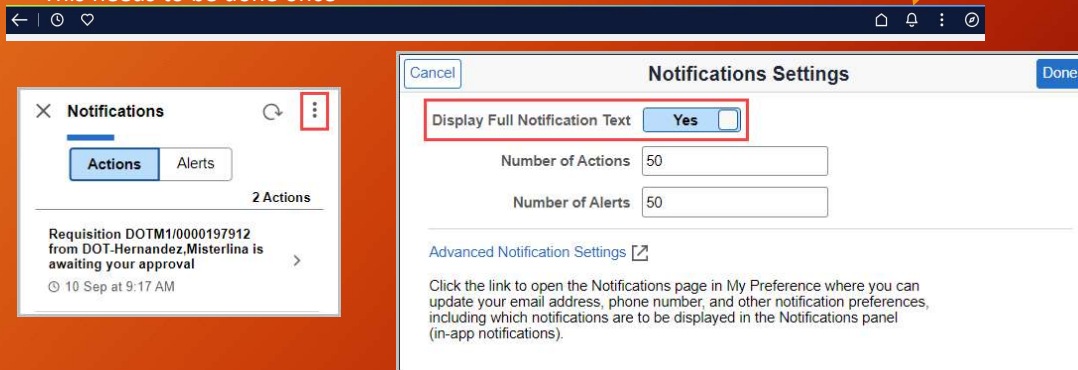
5 rows

Requisition 1.00 USD	DOTM1 / 0000197909 / DOT-Hernandez,Misterlina / 0000197909	ACCENTURE LLP	Req Budget Approver	Routed 08/26/2024	>
Requisition 1.00 USD	DOTM1 / 0000197912 / DOT-Hernandez,Misterlina / TEST NOTIFY	ACCENTURE LLP	Req Amount Approver 1	Routed 09/10/2024	>

The new Notification Bell can also be used to organize approvals. This is located at the top right hand side of the page

Notifications - Settings

- Set Display Full Notification Text to Yes
 - This needs to be done once

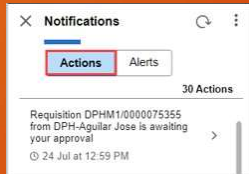


In order to display your full Notifications, you will have to configure your notification settings.

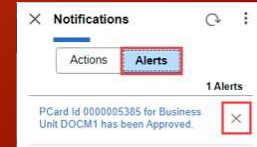
Click the notifications Bell, then click the 3 dot ellipsis, select settings. Make sure the 'Display Full Notification Text' is toggled to 'Yes'

Notification - Actions/Alerts

- Depending on the module and transaction type, a notification Action or Alert will be created.
- Clicking on either will take the user to the specific transaction.
- The key difference is that after a user processes the transaction (e.g. approve) a Notification Action will be cleared from the list.



- Alerts are maintained by the users. To remove one from the list, click the X.



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

Questions...



We went over the most noticeable eProcurement changes in fluid. Are there any questions I can answer at this point?

Accounts Receivable

Chris Marchese

Accounts Receivable

- Presented by Chris Marchese (Core-CT AR/BI Lead)

Accounts Receivable - Agenda

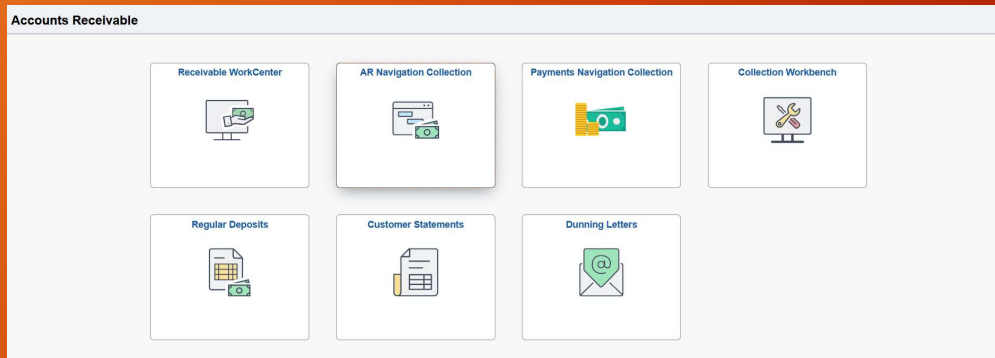
- Accounts Receivable Tiles
- Receivables WorkCenter
- AR Navigation Collection
- Payments Navigation Collection
- Collections Workbench
 - Items Tab
 - Aging Tab
 - Payments Tab
 - Correspondence Tab
 - Conversations Tab
- Other Tiles
- New Functionality
 - Customer Statements
 - Dunning Letters



Accounts Receivable – Agenda

- Accounts Receivable Tiles
- Receivable WorkCenter
- AR Navigation Collection
- Payments Navigation Collection
- Collections Workbench
- Other Tiles
- New Functionality

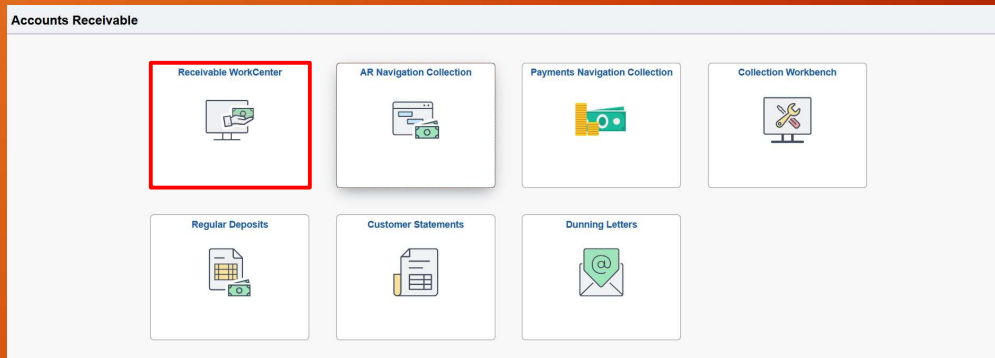
Accounts Receivable Tiles



Accounts Receivable Tiles

- One-Stop-Shop Type Tiles (Receivable WorkCenter & Collection Workbench)
- Navigation Collection Tiles (Brand New)
- Shortcuts to Common Functionality (Regular Deposit, Customer Statements, Dunning Letter)

Receivables WorkCenter



Receivable WorkCenter

- One-Stop-Shop to all your daily AR needs
- Existing functionality has been re-engineered to Fluid



Receivables WorkCenter

WorkCenters...






- Still have 4 Main Sections
 - My Work, Links, Queries, Reports/Processes
- Collapse & Expand with Left-Side Navigation
- Can Hide Navigation to Create More Workspace


Receivables WorkCenter

Direct Journals to Complete

Actions  

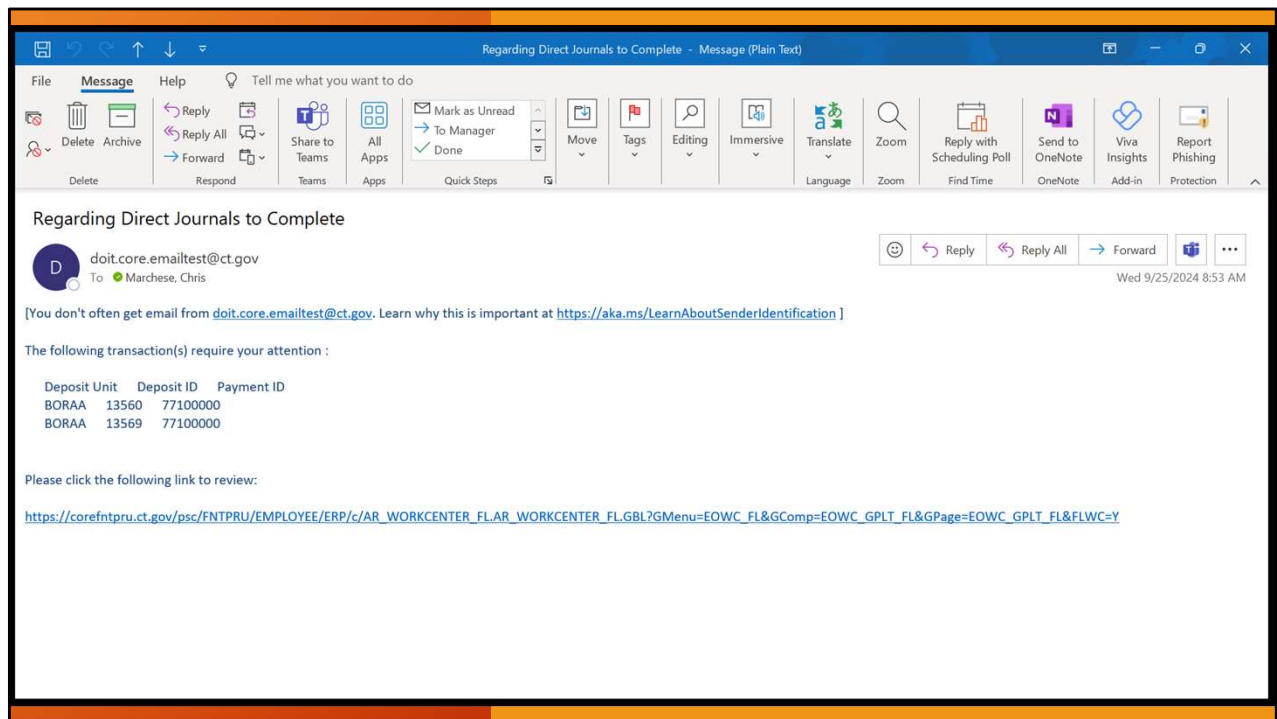
Detail 1 Detail 2

<input type="checkbox"/> Deposit Unit 	Deposit ID 	Pay Seq 	Payment ID 	Payment Amount 
<input type="checkbox"/> BORAA	13560	1	77100000	112.00
<input type="checkbox"/> BORAA	13569	1	77100000	4,106.00



Receivable WorkCenter

- 4 Main Sections all on Left-Side Navigation
- Sections & Sub-Sections can collapse and expand
- Hide/Show Left-Side Navigation



Receivables WorkCenter – My Work

- “Activate” My Work Links by setting up Filters
 - For AR, each My Work Link uses a different Filter
- NEW: Direct Journals to Complete My Work Link
 - Will display any Direct Journals where the Complete Checkbox is not marked
- “Actions” Drop-Down
 - Various actions can be performed depending on the My Work Link
 - “Email Notification” is a new Action Item

Receivables WorkCenter

Links, Queries, Reports/Processes...

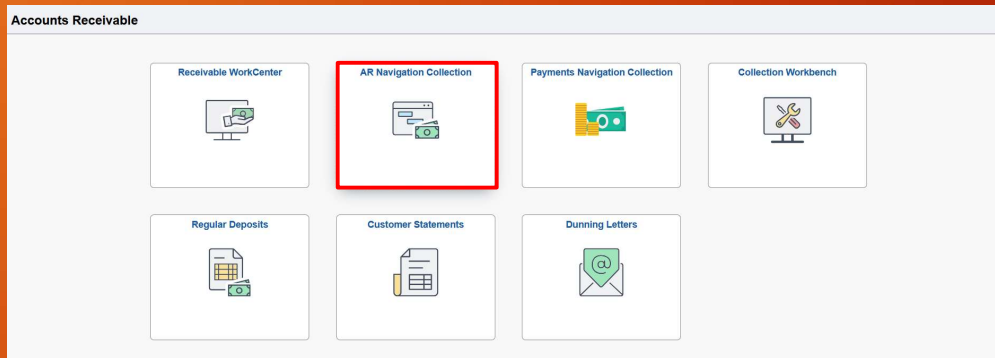
- Access to majority, if not all, of day-to-day navigational pages

The image displays two screenshots of the Receivables WorkCenter interface. The left screenshot shows a navigation menu with categories such as Regular Deposit, Regular Deposits, and Regular Deposits. The right screenshot shows a search form titled 'Find an Existing Value' with fields for 'Deposit ID', 'Agency Location Code', 'Contract Total', 'Issue ID', and 'Assigned Operator ID'. Below the search form, there is a 'Find an Existing Value' button and a 'Clear' button. The interface also includes a 'Regular Deposit' section with a 'Find an Existing Value' button and a 'Clear' button.

Receivables WorkCenter – Links, Queries, Reports/Processes

- These 3 sections should provide users with all their daily navigational pages

AR Navigation Collection



AR Navigation Collection

- New fluid-based tile that is Customer & Item-based

AR Navigation Collection

Customer and Item-Based

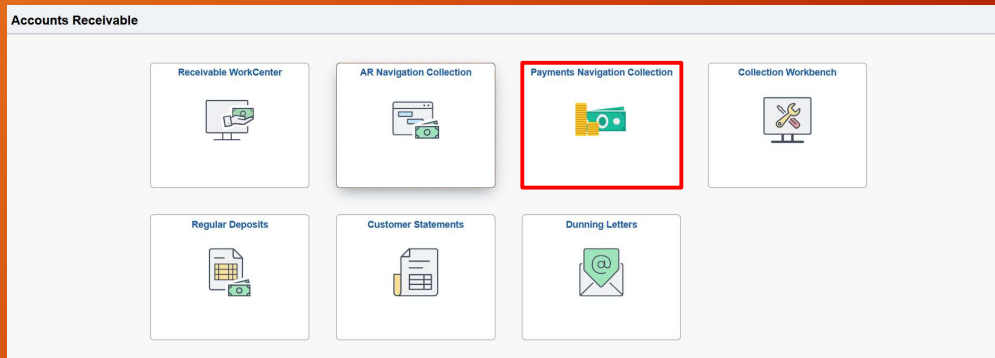
- My Customers
- My Receivable Items
- My Collections
- My Reports & Analysis

The screenshot shows the 'Receivables' application interface. On the left is a navigation menu with categories: 'My Customers', 'My Receivable Items', 'My Collections', and 'My Reports & Analysis'. The main area is titled 'General Information' and contains a search form. The search form includes a 'Find an Existing Value' header, a search criteria dropdown, and a text input field for search criteria. Below this are several search fields: 'Customer ID', 'Name 1', 'Name 2', 'Telephone', 'City', 'State', and 'Postal Code'. Each field has a 'begins with' dropdown and a search icon. At the bottom of the search form are checkboxes for 'Case Sensitive', 'Include History', and 'Correct History', along with 'Search' and 'Clear' buttons.

AR Navigation Collection

- Customer and Item-Based

Payments Navigation Collection



Payments Navigation Collection

- New fluid-based tile that is Deposit & Payment-based

Payments Navigation Collection

Deposit & Payment-Based

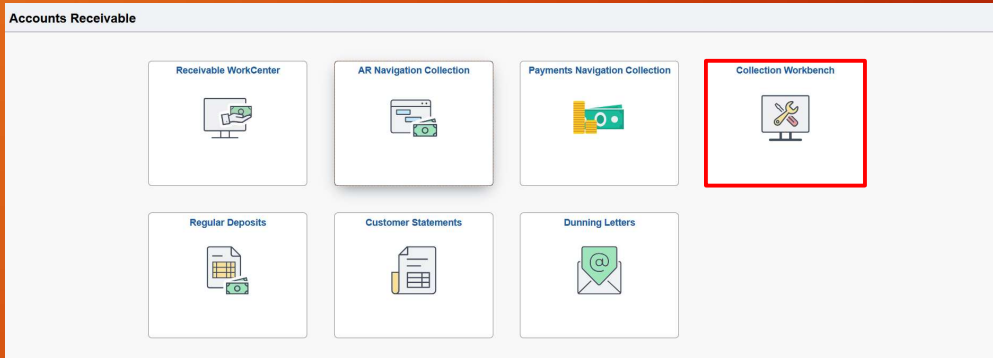
- Online Payments
- Apply Payments
- Direct Journal Payments
- Review Payments
- Reports

The screenshot displays the 'Payments' application interface. On the left is a navigation menu with categories: Online Payments, Apply Payments, Direct Journal Payments, Review Payments, and Reports. The 'Apply Payments' category is expanded, showing sub-items like 'Update Apply Payment Worksheet' and 'Finalize Payment Worksheet'. The main content area is titled 'Regular Deposit' and 'Find an Existing Value'. It features a search criteria section with fields for 'Deposit ID', 'Agency Location Code', 'Control Total', 'User ID', and 'Assigned Operator ID', each with a 'begins with' dropdown and a search icon. There are also 'Recent Searches' and 'Saved Searches' dropdowns at the top. At the bottom, there are 'Search' and 'Clear' buttons, and a small icon of a person with a globe.

Payment Navigation Collection

- Deposit and Payment-Based

Collection Workbench



Collection Workbench

- One-Stop-Shop to all your Customer related AR information

Collections Workbench

Receivables Information For a Single Customer...

- Item Tab
- Aging Tab
- Payments Tab
- Correspondence Tab
- Conversations Tab

The screenshot displays the 'Collections Workbench' interface. At the top, there are search fields for 'SetID', 'CMEMT', 'Unit', 'Customer', and 'Level'. The 'Customer' field is populated with '101' and 'Della Vecchia Funera Home'. Below the search fields, there are buttons for 'Search', 'Display Currency' (set to USD), 'Add Conversation', and 'Personalize Content'. The main section is titled 'Customer Details' and contains a table of financial and contact information.

Bill To Address 1 PO Box 4056	Balance 150.00	Primary Contact Della Vecchia Funera Home
Bill To City Danville	Past Due 150.00	Contact Title
Bill To State IL	Credit Limit 0.00	Contact Phone
Last Payment Date 09/27/2024	Risk Score	Contact Email
Last Payment Amount 3,750.00	Broken Promises 0	Last Statement Date 09/23/2024

At the bottom of the interface, there are tabs for 'Items', 'Aging', 'Payments', 'Correspondence', and 'Conversations'.

Collection Workbench

- Get various information for a single customer
 - Item, Aging, Payment, Correspondence & Conversations

Collections Workbench Items Tab

On the Items Tab...

- View Open Item List
- Select an Item Action

On the Items Tab (Detail 7)

- View the Invoice Image
- Email an Invoice Directly

Seq Nbr	Select	Item	BU Unit	Invoice	View Invoice Image	Email	Invoice Date	Invoice Billing Specialist	Bill Source	Consol Unit	Consol lev
1	<input checked="" type="checkbox"/>	CME40038	CME31	CME40038			07/19/2014	CHEARTON			

Search Result Totals			
Debits	1	Debit Amount	150.00 USD
Credits		Credit Amount	USD
Total	1	Total Amount	150.00 USD
Selected	1	Selected Amount	150.00 USD

Collection Workbench – Item Information

Collections Workbench Aging Tab

On the Aging Tab...

- Summarizes the Aging Amount, and Aging Count, by Category

Items: Aging Payments Correspondence Conversations

Customer Balances

Balance	150.00	High Balance	150.00	Balance Date	05/13/2020
Past Due	150.00	High Past Due	150.00	Past Due Date	09/23/2024

Aged Date: 09/23/2024 Aging ID: STD

Customer Aging

Aging Category	Aging Amount	Currency	Aging Count
04 61-90	150.00	USD	

Collection Workbench – Aging Information

Collections Workbench Payments Tab

On the Payments Tab...

- View Payment Information
 - Outstanding Payments
 - Completed Payments
- Search Completed Payments by a Date Range

Invoice ID	Customer	Payment ID	Status	Due Date	Amount	Currency	Payment Method
1000000001	1000	1000000001	PAID	01/15/2024	100.00	USD	CHECK
1000000002	1000	1000000002	PAID	01/15/2024	200.00	USD	CHECK
1000000003	1000	1000000003	PAID	01/15/2024	300.00	USD	CHECK

Collection Workbench – Payment Information

Collections Workbench Correspondence Tab

On the Correspondence Tab...

- View Statement History
 - NEW: Statement Image
 - NEW: Email Statement
- View Dunning History
 - NEW: Dunning Image
 - NEW: Email Letter

Dunning Letters

Dunning Actions:

Dunning History

Dunning Date:

Letters

More Info	Dunning Number	Dunning Date	Printed	Business Unit	Amount	Currency	Dunning Image	Email
	4390	09/26/2024	Y	DMEM1	190.00	USD		

Collection Workbench - Correspondence Information

- Statements
- Dunning Letters

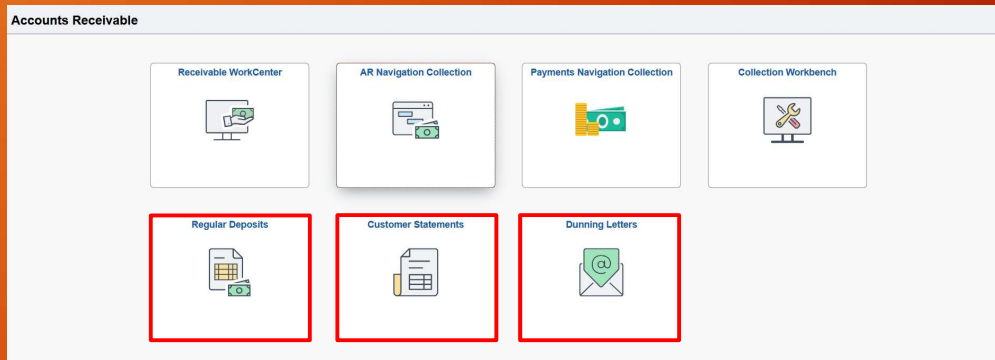
Collections Workbench Conversations Tab

- On the Conversations Tab...
- View/Add Customer Conversations

More Info	Unit	Cust ID	Created By	Description	Conversation Date	Status	Number of Entries	Attachments	Subject
	CNEM1	101	COREMarchesCh	PUN 40v Conversation	09/26/2024	New	1	N	EXTERNAL

Collection Workbench – Conversation Information

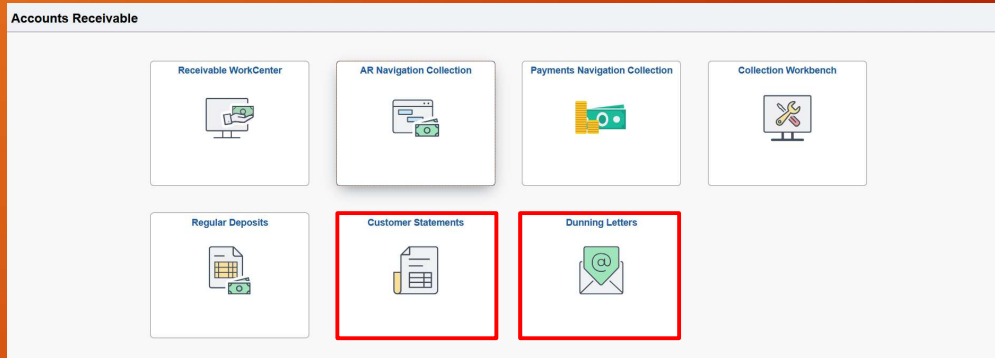
Other Tiles



Other Tiles

- Shortcuts to Regular Deposits (Pick List), Customer Statements, and Dunning Letters

New Functionality



New Functionality

- Customer Statements & Dunning Letters can now be emailed

New Functionality Customer Statements

Create Customer Statements

- **NEW:** Email Statement
 - Customer Contacts must be configured for Email

The screenshot shows the 'Create Customer Statements' interface. It includes a 'Statements Parameters' tab and a 'Currency to Convert' field. Below this, there are fields for 'Run Control ID' (Create_Customer_Statements), 'Report Manager', 'Process Monitor', and 'Run'. A 'Language' dropdown is set to 'English'. The 'Report Request Parameters' section contains several fields: 'As of Date' (09/28/2024), 'Unit' (CMEM1), 'SetID' (CMEM1), 'Customer' (101), 'Correspondence Customer' (%), 'Statement Group' (All Statement Groups), and 'Balance Forward Due Date' (03/21/2013). There are also checkboxes for 'Use System Date', 'Open Item', 'Open Item Include Drafts', 'Balance Forward', and 'Balance Forward Re-run'. The 'Email Statement' checkbox is checked and highlighted with a red box.

New Functionality – Customer Statements

- Select the Email Statement checkbox
 - Assumption is that Customer Contact is configured for Emailing

New Functionality Dunning Letters

Dunning Letters

- **NEW:** Email Dunning Letter
- Customer Contacts must be configured for Email

The screenshot shows the 'Dunning Letter' configuration window. It includes a 'Dunning Letters Parameters' tab and a 'Display Currency' button. The 'Run Control ID' is 'Extract_Dunning_Letter_Info' and the 'Language' is 'English'. There are 'Report Manager', 'Process Monitor', and 'Run' buttons. The 'Report Request Parameters' section contains the following fields:

- As of Date: 09/26/2024 (with a 'Use System Date' checkbox checked)
- SetID: CMEM1 (with a search icon) - Chief Medical Examiner's Offc
- Unit: CMEM1 (with a search icon) - Chief Medical Examiner's Offc
- Customer ID: 101 (with a search icon) - Della Vecchia Funeral Home
- Correspondence Customer: (with a search icon)
- Dunning Group: All Groups (dropdown menu)
- Use Severest Dunning Letter (radio button, selected)
- Use Modest Dunning Letter (radio button)
- Email Dunning Letter (checkbox, checked and highlighted with a red box)

New Functionality – Dunning Letters

- Select the Email Dunning Letter checkbox
 - Assumption is that Customer Contact is configured for Emailing

Billing

Agnieszka (Agnes) Kowalewska

My name is Agnieszka (Agnes) Kowalewska.

In Core-CT Financials Team I work with Chris Marchese and take care of Accounts Receivable, Billing and Banking modules.

Billing Agenda

- Billing Tiles
- Billing WorkCenter
 - Filter Set-up
 - Editing the Filter
 - Place to go for your Processes
 - Sections
 - Other Links Section
 - My Processes Section
- Billing Navigation Collection
- Other Billing Tiles
- New Functionality - Copy Single Bill
- Customer Contacts for Paperless Invoicing
- Month-end e-mail reminders
- Billing Interfaces



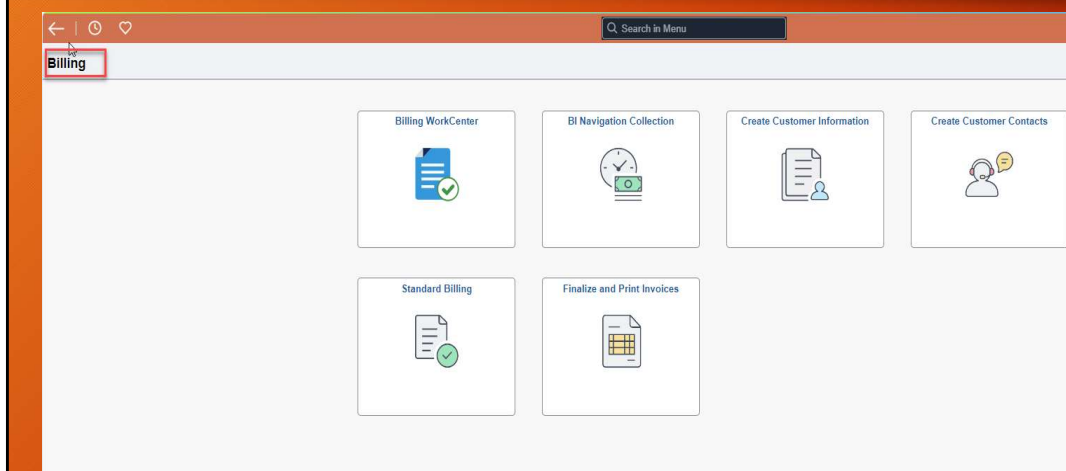
Welcome to the Billing section. Today I will cover the newest changes along with new functionality in Billing.

I will start off with Billing Tiles called a Billing Dashboard, review of the Billing WorkCenter and Billing Navigation Collection.

Then I will move to Other Billing Tiles and a new functionality in Copy Single Bill.

And I end with Customer Contracts for Paperless Invoicing, month-end e-mail reminders, I am guessing your favorite, and information about Billing Interfaces.

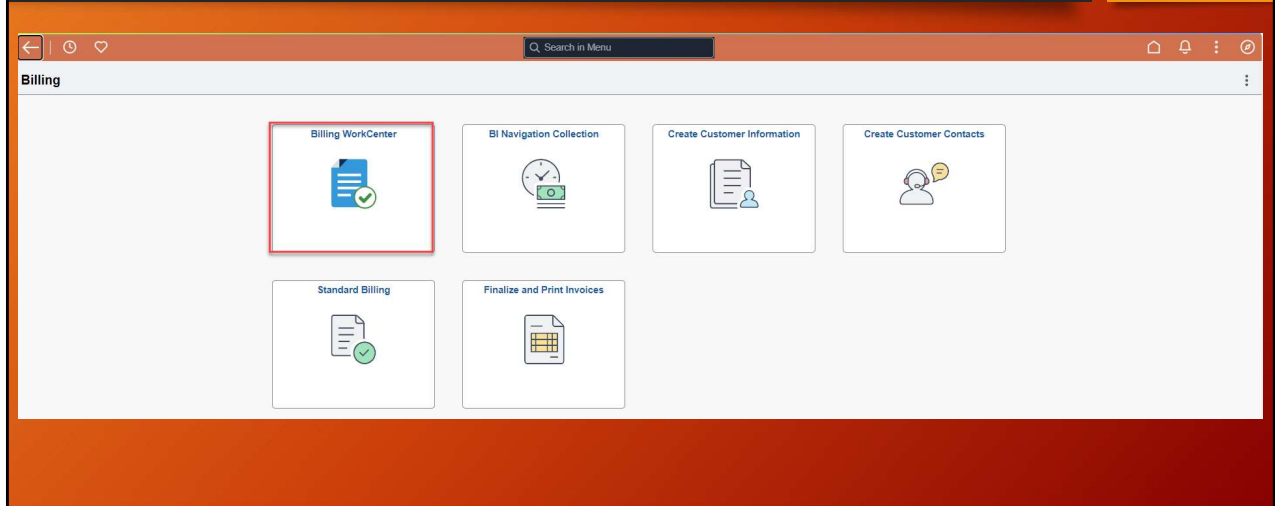
Billing Tiles



This is a Billing Dashboard with six tiles:

- First two tiles are one-stop-shop type tiles where CORE-CT Billing users will have access to most frequently used pages and these are: Billing WorkCenter and Billing Navigation Collection.
- Billing Navigation Collection is a brand new tile, we don't have it today in our current CORE-CT.
- Next four Billing tiles are shortcuts to common functionality and these are:
 - Create Customer Information,
 - Create Customer Contacts,
 - Standard Billing,
 - and Finalize and Print Invoices.

Billing WorkCenter



Billing WorkCenter tile is:

- A one-stop place to all daily/ weekly Billing needs for Billing Users.
- Existing functionality has been re-engineered to Fluid.
- Billing WorkCenter was set-up this way that most of daily and weekly Billing processes could be done from here without a need to navigate to individual CORE-CT pages.
- Billing WorkCenter gives users quick access and provides an overview and status status of some Billing transactions.

Billing WorkCenter

Billing WorkCenter

- Still have 4 Main Sections
 - My Work, Links, Queries, Reports/Processes
- Collapse & Expand with Left-Side Navigation
- Users can hide Navigation to Create More Workspace

The screenshot displays the Billing WorkCenter interface. On the left is a navigation pane with sections: My Work, Current Work, Invoices Not Finalized (67), Recurring Invoices Not Gen... (301), Recurring Schedules Expiring, Invoices Entered Today, Recent Invoices (130), and Recent Credit and Rebill L... (1). The 'Recent Credit and Rebill L...' section is highlighted with a red box. Below this are sections for Links, Queries, and Reports/Processes. A red box highlights a hamburger menu icon next to the 'Recent Credit and Rebill L...' section. The main content area shows a table titled 'Recent Credit and Rebill Invoices' with 1 row. The table has columns: Business Unit %, Invoice %, Bill To %, Customer Name %, Invoice Amount %, Currency %, Bill Status %, Next Invoice %, and More. The data row shows: DOTM1, UC246872C12, UO6351, RICHARD'S SERVICE, INC., -145.00, USD, INV.

Business Unit %	Invoice %	Bill To %	Customer Name %	Invoice Amount %	Currency %	Bill Status %	Next Invoice %	More
DOTM1	UC246872C12	UO6351	RICHARD'S SERVICE, INC.	-145.00	USD	INV		

Billing WorkCenter

- We still have 4 Main Sections all on the Left-Side Navigation: My Work, Links, Queries, Reports & Processes.
- Sections & Sub-Sections can collapse and expand.
- CORE User can Hide/Show Left-Side navigation to create more workspace.

Billing WorkCenter

Links, Queries, Reports/Processes...

- Access to majority, if not all, of day-to-day navigational pages

The screenshot displays the Billing WorkCenter interface. On the left is a navigation menu with categories: My Work, Current Work, Links, Bill Entry Group, Other Links, Review Billing Information, Summary, Details (highlighted), Installment Bill Schedule, Recurring Bill Schedule, Review Entries by Invoice, Review Entries by Journal, Adjustment History, Review Line History, View Supporting Documentation, Queries, Query Manager, Billing Queries, Billing Pivot Grids, Bills by Status, Invoice Analysis by Month, and Reports/Processes. The main content area shows a 'Bill Inquiry' window with two tabs: 'Bill Summary Info' and 'Bill Summary Info 2'. The 'Bill Summary Info' tab is active, displaying a summary table and a detailed invoice breakdown. The summary table shows: Unit: DDTM1, Invoice: UC248483, Invoice Date: 10/01/2024, Customer: UC5366, ED BARTELLI, INC., Invoice Type: Regular, Bill Type: UD Use & Occupancy, Bill Source: MSC Miscellaneous, Bill Status: INV, Template: No, Consol Hdr: No, Bill By ID, Invoice Media: Print Copy, Due Date: 10/01/2024. The detailed invoice breakdown shows: Gross Extended Amount: 250.00, Total Discounts: 0.00, Total Surcharges: 0.00, Total VAT Amount: 0.00, Total Taxes: 0.00, Total Invoice Amount: 250.00, Forward Bal: 0.00, Paid Amount: 0.00, Total Due: 250.00 USD. Below the summary table are buttons for 'Return to Search' and 'Notify', and a search bar with 'Go to: Bill Search', 'Header Info: 1 Line Search', 'Address View Audit Logs', 'View Invoice Image Copy Address', and 'Notes'.

We are continuing with Billing WorkCenter:

- These 4 sections (My Work, Links, Queries, Reports/Processes) should provide users with most if not all their daily navigation pages,
- They give users access to their daily/ or weekly most frequent Billing processes and transactions.

Billing WorkCenter - Filter Set-up

The screenshot shows the Billing WorkCenter interface. On the left, there is a navigation pane with sections like 'My Work', 'Current Work', 'Invoices Not Finalized', 'Recuring Invoices Not Gen...', 'Recuring Schedules Expiring', 'Invoices Entered Today', 'Recent Invoices', 'Recent Credit and Rebill...', 'Links', and 'Bill Entry Group'. The 'Recent Credit and Rebill...' section is highlighted in green. In the main area, a table titled 'Recent Credit and Rebill Invoices' is displayed. A 'Personalize' menu is open over the table, with 'Edit Filters' highlighted in green. The table has columns: Business Unit, Invoice #, Bill To #, Customer Name, Invoice Amount, Currency, Bill Status, Next Invoice #, and More. The table contains 22 rows of data.

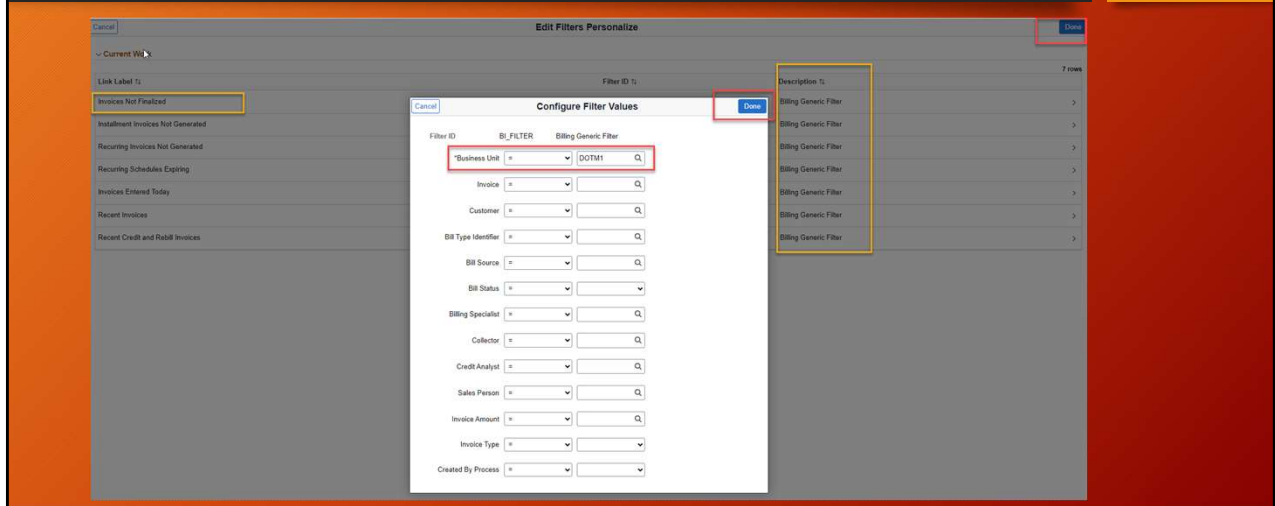
Business Unit	Invoice #	Bill To #	Customer Name	Invoice Amount	Currency	Bill Status	Next Invoice #	More
DOTM1	U0246872C12	U05351	RICHARD'S SERVICE, INC.	-145.00	USD	INV		>
DOTM1	U0243133D13	U05004	JRD PROPERTIES, LLC.	91.35	USD	INV		>
DOTM1	U0243133C13	U05004	JRD PROPERTIES, LLC.	-135.00	USD	INV	U0243133D13	>
DOTM1	AD218923D12	ADN318834D21A	AMAKER, CRADELL	1,016.90	USD	INV		>
DOTM1	AD218923C12	ADN318834D21	CONNECTICUT PAINTING GROUP INC.	-1,016.90	USD	INV	AD218923D12	>
DOTM1	AD218259C2	ADN111361018	DENNIS, CHRISTOPHER J	-2,079.26	USD	INV		>
DOTM1	AD218254D12	ADN118615021A	SHARPE, JENNIFER L.	4,168.03	USD	INV		>
DOTM1	AD218254C12	ADN118615021	CONTINENTAL GARAGE INC.	-4,168.03	USD	INV	AD218254D12	>
DOTM1	AD218040C5	AD214781019	OFFICE OF GENERAL COUNSEL, DEPT OF VA	-70,647.68	USD	INV		>
DOTM1	AD217088C5	AD115428020	KENNEDY, NIKOLAS	-5,302.45	USD	INV		>

Before you start working with Billing module, each CORE User needs to set-up a filter in the Billing Work Center, so proper transactions are being displayed in the reports in the +Current Work Section.

There is a Personalize button at the left upper corner on the Billing WorkCenter page, highlighted in green.

CORE User needs to choose Edit Filters -> choose Business Unit or multiple Business Units he/ she has access to and click "Done" twice, which is presented on the next slide.

Billing WorkCenter - Editing the Filter



If a CORE User has access to multiple Business Units instead of one Business Unit only, when setting up the filter the operator 'in' should be used.

User can edit Billing WorkCenter filters as many times as needed and adjust them according to the needs.

Very important information is: on the page (Edit Filters Personalize) you can see that there are seven reports/ links in this section called Current Work in Billing WorkCenter.

All links require filters to be set-up.

A good news is that CORE user needs to set-up Billing filter for the 1st link – here it is Invoices Not Finalized highlighted in yellow. Once filter is set-up for the first Link/ Report it will be applied to all seven.

Billing WorkCenter - Sections

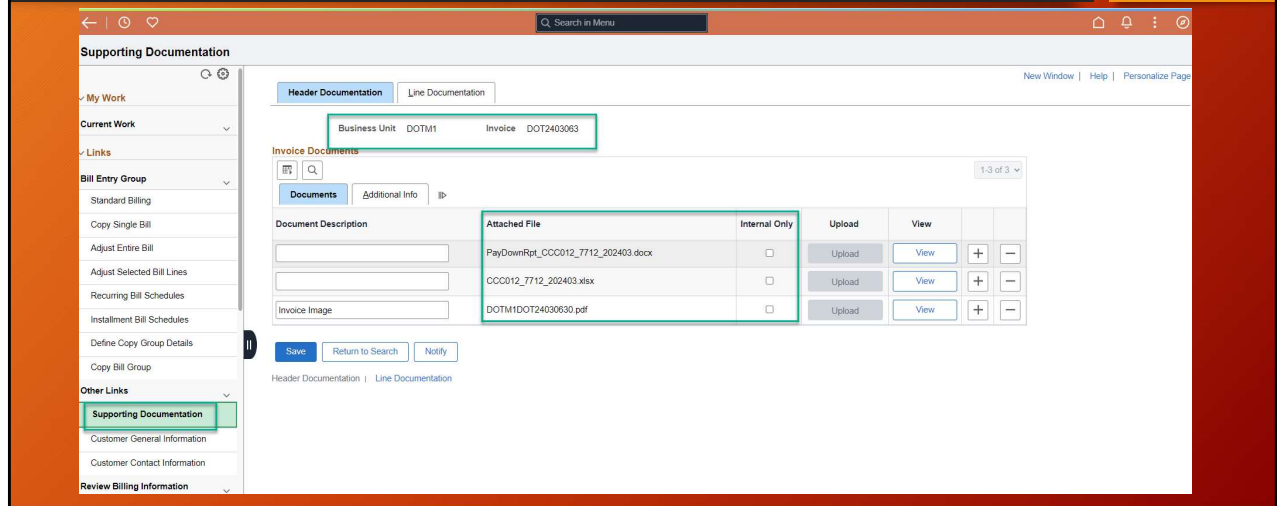
The screenshot displays the Billing WorkCenter interface. On the left is a navigation menu under 'My Work' with categories like 'Current Work', 'Links', 'Bill Entry Group', 'Other Links', 'Review Billing Information', 'Queries', and 'Reports/Processes'. The 'Current Work' section is expanded, showing items like 'Invoices Not Finalized' (65), 'Recurring Invoices Not Gen...' (278), 'Recurring Schedules Expiring' (6), 'Invoices Entered Today', 'Recent Invoices' (581), and 'Recent Credit and Rebill I...' (22). The main area shows a table titled 'Recent Credit and Rebill Invoices' with 22 rows. The table has columns for Business Unit, Invoice, Bill To, Customer Name, Invoice Amount, Currency, Bill Status, and Next Invoice. A 'Related Information' panel is visible on the right.

Business Unit	Invoice	Bill To	Customer Name	Invoice Amount	Currency	Bill Status	Next Invoice
DOTM1	UC246872C12	UC0351	RICHARD'S SERVICE, INC.	-145.00	USD	INV	
DOTM1	UC243133D13	UC0504	JRD PROPERTIES, LLC.	91.35	USD	INV	
DOTM1	UC243133C13	UC0504	JRD PROPERTIES, LLC.	-135.00	USD	INV	UC243133D13
DOTM1	AD218923D12	ADN318834021A	AMAKER, CRADELL	1,016.90	USD	INV	
DOTM1	AD218923C12	ADN318834021	CONNECTICUT PAINTING GROUP INC.	-1,016.90	USD	INV	AD218923D12
DOTM1	AD218259C2	ADN111361018	DENNIS, CHRISTOPHER J	-2,078.26	USD	INV	
DOTM1	AD218254D12	ADN118615021A	SHARPE, JENNIFER L.	4,168.03	USD	INV	
DOTM1	AD218254C12	ADN118615021	CONTINENTAL GARAGE INC.	-4,168.03	USD	INV	AD218254D12
DOTM1	AD218040C5	AD214781019	OFFICE OF GENERAL COUNSEL, DEPT OF VA	-70,647.68	USD	INV	
DOTM1	AD217098C5	AD115428020	KENNEDY, NIKOLAS	-5,302.45	USD	INV	

Summarizing: Billing WorkCenter is one place to go for your daily Billing processes and status of your transactions.

It is to be used instead of navigating manually to individual Billing CORE pages.

Billing WorkCenter - Other Links Section

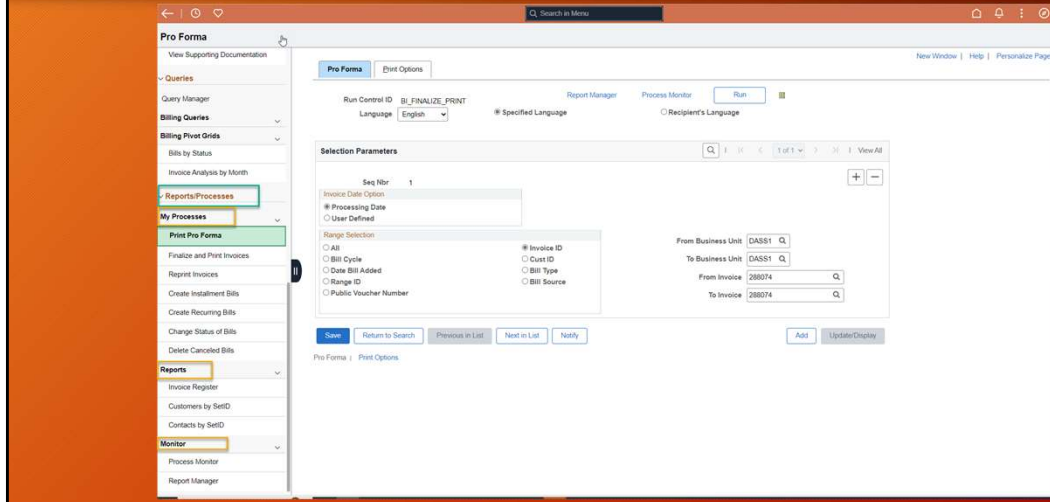


In Other Link Section in the Billing WorkCenter Users will see access to Supporting Documentation as well as Customer General Information (a page where we create a Customer) and Customer Contact Information (where we can assign an e-mail address for a Customer).

Supporting Documentation page applies to an invoice and it allows a Billing module User to:

- Review supporting documents and also
- View/ Add and Delete them if needed.

Billing WorkCenter - My Processes Section



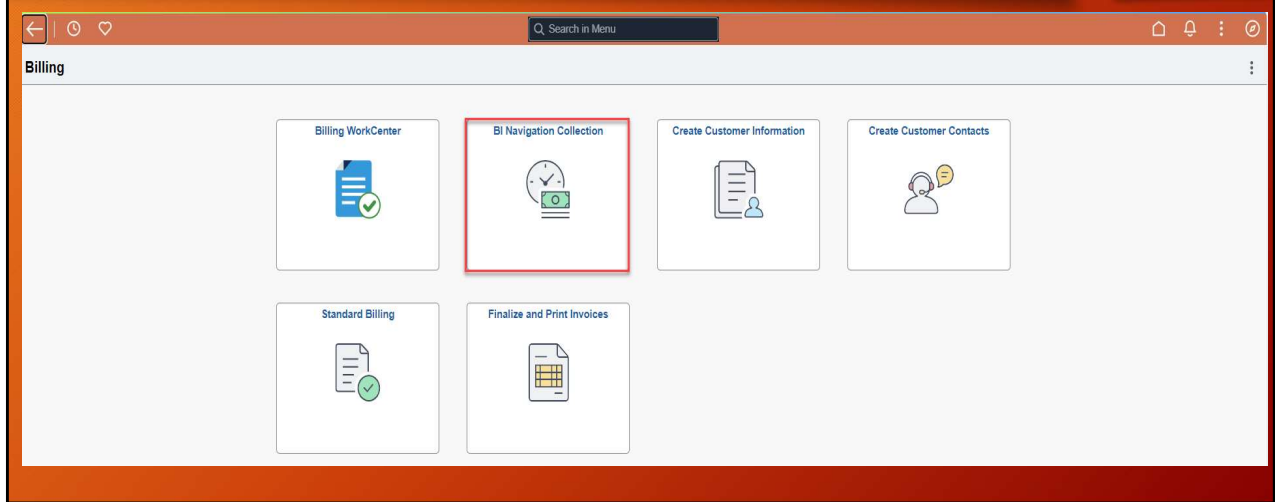
In Reports/ Processes Section of the Billing WorkCenter there is access to most frequently Billing Processes and Reports used.

Example provided on this slide is a Print Pro-Forma invoice page. This is probably a page that most of you with access to Billing module use weekly if not daily.

Under My Processes CORE Users will also have access to other frequent Billing processes as the following:

- Finalize & Print Invoices,
- Reprint Invoices,
- Create Installment Bills,
- Create Recurring Bills,
- Change Status of Bills and
- Delete Cancelled Bills.

BI Navigation Collection



Billing Navigation Collection Tile is a brand new tile in Billing.

BI Navigation Collection

Customer & Invoice-Based

- My Customers
- My Billing Invoices
- My Accounting
- My Reports and Analysis

The screenshot displays a web application interface for a Billing Navigation Collection. The interface is divided into a left sidebar and a main content area. The sidebar, titled "Billing", contains a list of navigation items: "My Customers", "Create Customer Info", "Create Customer Contacts", "My Billing Invoices", "Standard Billing", "Copy Single Bill", "Adjust Entire Bill", "My Accounting", "Review Entries by Invoice", "Review Entries by Journal", "My Reporting and Analysis", "Invoice Register", "Details", and "Adjustment History". The main content area is titled "General Information" and features a search section. The search section includes a "Find an Existing Value" button, a search criteria dropdown, and a search input field. Below the search input are several dropdown menus for "Customer ID", "Name 1", "Name 2", "Telephone", "City", "State", and "Postal Code". At the bottom of the search section are checkboxes for "Case Sensitive", "Include History", and "Correct History", along with "Search" and "Clear" buttons.

Billing Navigation Collection is a Customer and Invoice-Based Tile grouping the most frequent processes for a Customer and invoices. It has 4 Sections: My Customers, My Billing Invoices, My Accounting and My Reports & Analysis.

BI Navigation Collection

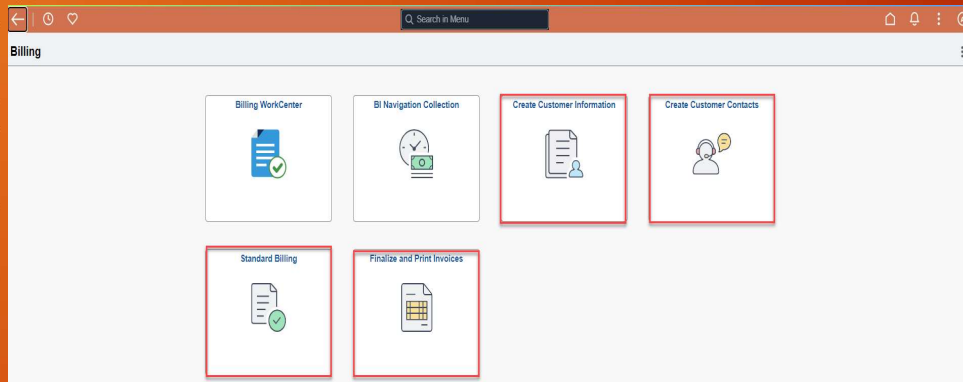
The screenshot displays the 'Review Entries by Invoice' report within the Billing Navigation Collection. The report is titled 'Accounting Entries' and shows a table of accounting entries for a specific invoice. The invoice details are: Unit: DOTM1, Invoice: DOT2403063, Bill To: CCC012, CSCC Quinebaug Valley Campus, and Invoice Amt: 152.88 USD. The report is divided into five tabs: 'Acctg Information', 'Transaction Accounts', 'Discounts/Surcharge', 'Journal Information', and 'Reference Information'. The 'Acctg Information' tab is selected, showing a table with columns: GL Unit, Acctg Date, Type, Fund, Dept, SID, Program, Account, Bal Ref, ChartField 1, ChartField 2, and ChartField 3. The table contains four rows of data, all with a GL Unit of 'STATE' and an Acctg Date of '04/04/2024'. The first row is for 'Accounts Receivable - MOD_ACCRL' with a debit of 11620. The second row is for 'Reversal of AR - MOD_CASH' with a credit of 11620. The third row is for 'Recognized Revenue - MOD_ACCRL' with a debit of 53020. The fourth row is for 'Recognized Revenue - MOD_ACCRL' with a credit of 53020. The total debits are 305.76 USD and the total credits are -305.76 USD. There are 'Return to Search' and 'Notify' buttons at the bottom of the report.

GL Unit	Acctg Date	Type	Fund	Dept	SID	Program	Account	Bal Ref	ChartField 1	ChartField 2	ChartField 3
STATE	04/04/2024	Accounts Receivable - MOD_ACCRL	12001	DOT57428	10020		11620				
STATE	04/04/2024	Reversal of AR - MOD_CASH	12001	DOT57428	10020		11620				
STATE	04/04/2024	Recognized Revenue - MOD_ACCRL	12001	DOT57428	10020	14000	53020				
STATE	04/04/2024	Recognized Revenue - MOD_ACCRL	12001	DOT57428	10020	14000	53020				

Total Debits: 305.76 USD
Total Credits: -305.76 USD

I am presenting the example of the report in Billing Navigation Collection Tile in My Accounting Section – it is Review Entries by Invoice. As you can see this page/ report has few sub-pages/ tabs where user can see different information about any chosen invoice.

Other Tiles



Other Billing module Tiles – most popular and frequently used by CORE Billing users.

These other four Billing tiles are shortcuts to:

- Create Customer Information (to create or edit existing Customers),
- Create Customer Contacts (for paperless billing),
- Standard Billing where we create invoices,
- and Finalize and Print Invoices where you finalize an invoice/ or multiple invoices.

New Functionality - Copy Single Bill

- New: User can copy & create more than one bill

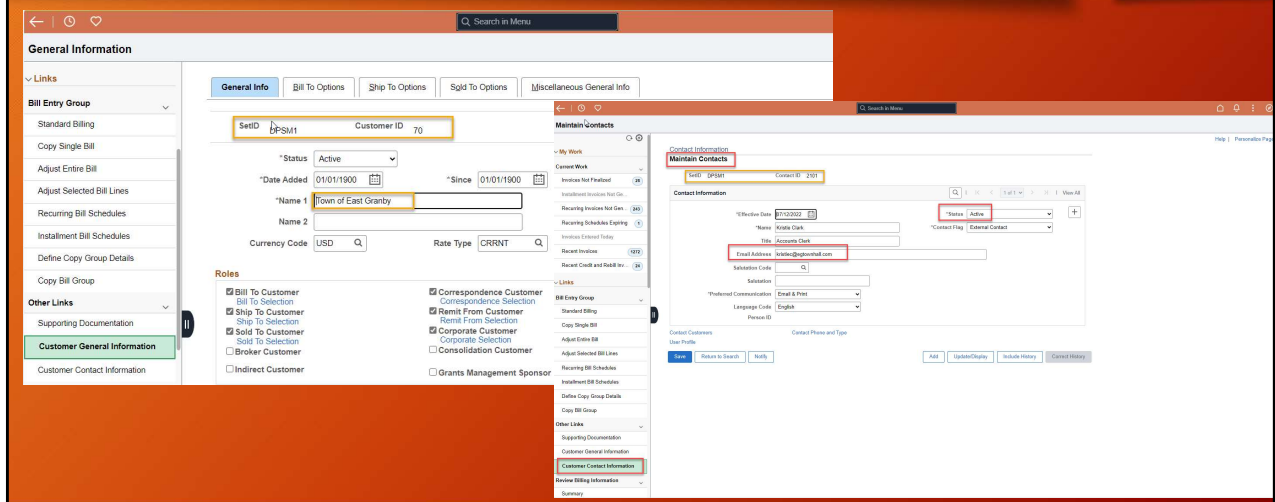
The screenshot displays the 'Copy Single Bill' interface. On the left is a navigation menu with options like 'Standard Billing', 'Copy Single Bill', 'Adjust Entire Bill', etc. The main area shows bill details: Unit AESM1, Invoice AES340, Bill To 20, Invoice Amt 3,937.90, and Villanova University. Under 'Select Bill Action', the 'Copy Bill' radio button is selected. A red box highlights the 'Number of Copies' field, which contains the value '3'. Below this is a 'Copy Results' table with one row: Sequence 1, Copy Bill NEXT, and Invoice Date. Buttons for 'Save', 'Return to Search', and 'Notify' are at the bottom.

With the current upgrade there is a new functionality implemented in Copy Single Invoice. This new functionality allows Users to create more than one copy of the bill. Currently you are able to create one copy at a time and in upgraded CORE you will be able to create multiple bills as a copy of one existing bill.

Steps to Copy Single Bill (as presented on the slide):

- a) A User selects Copy Bill,
- b) then selects Number of Copies required,
- c) After this is done it SAVES to proceed and create copy/ or multiple copies of the given invoice.

Customers Contacts for Paperless Invoices



This is a reminder about already existing functionality for Billing module. It is not new functionality, but existing one.

It is tying Customer Contact to existing Customer ID.

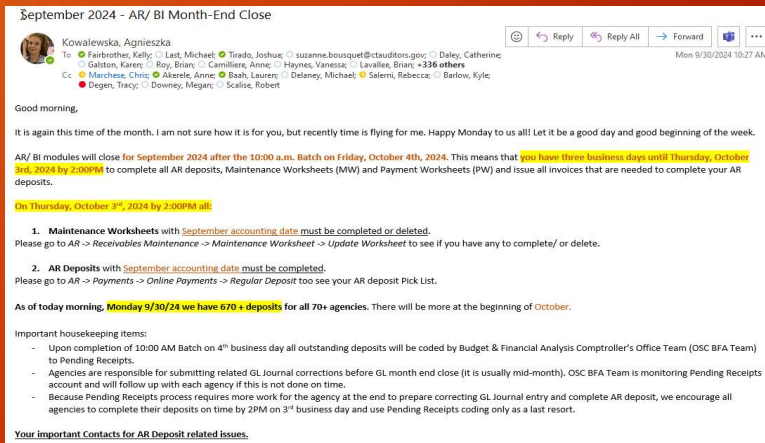
This allows agency to send invoices via e-mail to its Customers when Customer Contact is set-up and e-mail is entered.

On this slide to the right: Maintain Contacts you have a place where Customer address can be set-up.

Additionally, the new functionality that Chris spoke about like sending Customer Statements and Dunning Letters via e-mail that is available in upgraded CORE also requires Customer Contacts set-up.

Month-end e-mail reminders

- AR and BI month-end closing e-mail will be send as usual, the last day of each month.
- AR and BI modules closing will happen on 4th business day of the month for the prior month.



I am sure these are your favorite e-mails or one of the most favorite :). AR and BI (as on the slide).

Billing Interfaces

- Billing Interfaces will work as usual.
- Key-Agency Contacts will be notified via e-mail if there are issues to be resolved and their input/ or action is required.
- Agencies with existing Billing Interfaces:
 - BORCC - CT State Community College system
 - CMEM1 - Chief Medical Examiner's Office
 - DASM1/ DASS1 - Department of Administrative Services
 - DOTM1 - Department of Transportation
 - DPHM1 - Department of Public Health and
 - DPSM1 - Department of Emergency Services & Public Protection

We received few questions from various agencies whether there are any changes to Billing interfaces and how it will work in upgraded CORE.

Billing interfaces will work as usual, there are no changes to the process for agencies and us in CORE Team.

Questions



This brings us to any questions you might have for the Billing module.
I will hand the presentation over to Jim Klaben who will talk about the GL module.

Break

General Ledger

James Klaben

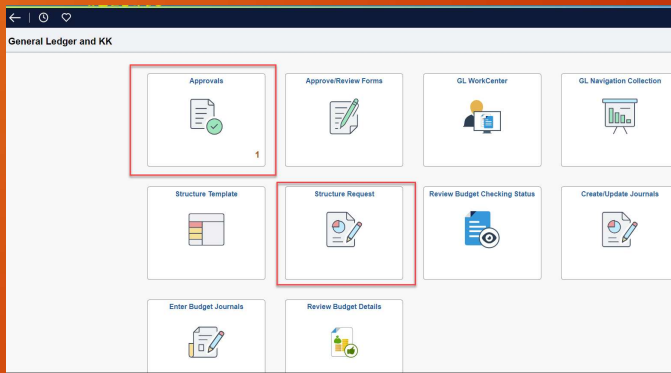
GL Agenda

- GL Dashboard
- WorkCenter
- Structure Requests
- Approvals
- Approval/Deny - Notifications
- New Chartfield Value - Chartfield 3



The slide gives an overview of topics covered for GL

GL Dashboard



- General Ledger and KK Dashboard contains some of the most used areas including GL WorkCenter and GL Navigation Collection
- There are features that are new for this upgrade which include the “Approvals” and “Structure Requests” tiles
- These tiles will bring you to new pages which are covered in the following slides

GL WorkCenter

The screenshot displays the 'General Ledger WorkCenter' interface. On the left, there is a navigation menu with options: 'My Work', 'Links', 'Queries', and 'Reports/Processes'. The main content area is divided into two panes. The left pane, titled 'Welcome to WorkCenter', contains a 'WorkCenter Page' and a 'Fluid' indicator. The right pane, titled 'General Ledger WorkCenter', contains several sections: 'Mark Journals for Posting', 'Post Journals', 'Enter Budget Journals', 'Enter Budget Transfer', 'Budget Exceptions', and 'Other Links'. The 'Other Links' section includes 'Ledger Inquiry', 'Tree Manager', 'Tree Viewer', 'Process Monitor', 'Structure Request', 'Project ID Request Form', 'Payroll Acct Code Request Form', and 'Chartfield Request - Archived'. The 'Structure Request' and 'Chartfield Request - Archived' links are highlighted with red boxes. To the right of the 'Other Links' section is a table titled 'Journals Available to Edit' with columns for 'Unit', 'Journal ID', 'Journal Date', and 'UnPost Sequ'. The table contains several rows of data, each with a checkbox in the 'Unit' column.

Unit	Journal ID	Journal Date	UnPost Sequ
<input type="checkbox"/>	STATE 0002296902	02/21/2024	
<input type="checkbox"/>	STATE 0002296903	02/21/2024	
<input type="checkbox"/>	STATE 0002297015	03/05/2024	
<input type="checkbox"/>	STATE 0002297116	04/02/2024	
<input type="checkbox"/>	STATE 0002297118	04/02/2024	
<input type="checkbox"/>	STATE 0002297119	04/02/2024	
<input type="checkbox"/>	STATE 0002297410	05/21/2024	
<input type="checkbox"/>	STATE 0002297531	06/06/2024	

- A brief over of the new GL WorkCenter format.
- Same menu options but different format.
- Note the Structure Request link. This will bring you to the new Structure Request page.
- Chartfield Request inquiry is archived but still visible. This will show all historical Chartfield Requests.

Structure Requests

- Old Chartfield Request process no longer supported. Pages will be archived to store historical request information.
- Structure Request supports new fluid layout.
- The same information is needed in order to submit a request but in a new format.
- Approvals are processed through Approval tile on GL/KK dashboard.
- Same notifications are received as with Chartfield Request via email and in the system.
- Any current Chartfield Requests in queue need to be completed by November 25. Any new requests after the 25th need to be submitted as Structure Requests.

Structure Requests

The screenshot displays the 'General Ledger and KK' dashboard on the left and the 'Financial Structure Request' page on the right. The dashboard includes tiles for 'Approvals' (9), 'Approve/Review Forms', 'Structure Template', and 'Structure Request' (highlighted with a red box). The 'Financial Structure Request' page features a 'New Search' section, a 'Request Status' filter (In Progress: 19, Canceled: 4, Completed: 2, New: 2), and an 'Entered By' filter. A table titled 'View Financial Structure Request' shows 27 results. The '+ Add' button is highlighted with a red box.

Reason for Request 1:	Request ID 1:	No of Line 1:	Request Status 1:	Entered By
Test new SID	0000000027	1	In Progress	OSC-Klabe
Add New Department	0000000026	2	In Progress	JUD-Hollid
test	0000000025	0	Canceled	OSC-Klabe
TEST	0000000024	0	New	OSC-Dustri
Test	0000000023	1	In Progress	OSC-Klabe
New Department test	0000000022	1	In Progress	OSC-Virone
New DEPTIDS for OSC	0000000021	3	In Progress	OSC-Klabe

- Structure Request exists as a tile on the new General Ledger and KK dashboard
- Clicking on the Structure Request tile will bring you to Financial Structure Request page
- The Structure Request page contains filters to view specific Request Statuses in queue
- (right screenshot) You will click the Add button to start a new request

Structure Requests

Unlike the Chartfield Request, each Structure Request can have multiple detail lines for more than 1 Chartfield Add/Update at a time

The screenshot displays the 'Financial Structure Request' form. The 'General Information' section includes fields for Request ID (000000021), User ID, Requester (OSG-Klaben James), Email Address (james.klaben@ort.gov), Telephone (203-892-9999), Request Comment, Request Status (In Progress), Entered By (COREKlaben J OSG-Klaben James), Reason for Request (New DEPTDS for OSG), and Confidentiality (No). Below this is a 'Discussion / Attachments' section and a 'Request Lines' table.

ID	Status	Business Unit	SetID	Field Name	Template Type	Justification	Request Detail
1	Pending Approval	STATE	STATE	DEPTID	ChartField	Justification	Request Detail
2	Pending Approval	STATE	STATE	DEPTID	ChartField	Justification	Request Detail
3	In Review	STATE	STATE	PROGRAM_CODE	ChartField	Justification	Request Detail

-The main request page contains the same general information as needed on the old Chartfield Request for Requester, Email Address, Phone, Comments, and Request Reason. Attachments are also available if needed.

-Each main request can have multiple Request Lines. Each Request line has it's own approval path for the specific Chartfield value requested.

-Clicking on the Request Detail button brings you to the detail line selected(next slide).

Structure Request

Each request will require the same information as provided with the Chartfield Request form

The image displays two side-by-side screenshots of the 'Structure Request Detail' form. The left screenshot shows the 'Request Assignment' tab, and the right screenshot shows the 'Core Information' tab. Both screenshots show the same data for a request with ID 0000000083 and detail ID 1, in 'In Review' status, for the 'STATE' business unit and 'DEPTID' field name. The 'Request Type' is 'Add' and the 'Field Value' is 'OSC15191'. The 'Core Information' tab includes fields for 'Budgetary Only' (No), 'Effective Date' (07/01/2024), 'Status' (Active), 'Company', 'Manager ID', 'Description' (DeptID location1), 'Manager Name', and 'Short Description' (DeptID).

- The screenshots show on the left side navigation: Core information, Business Justification, and Questions specific to each chartfield value
- Again, this is the same information required as before with the Chartfield Request pages, but the horizontal navigation bar is gone

Approvals

- Structure Requests and Journal Approvals (accrual journals) will show under the new Approvals Tile.
- Project ID and Payroll Account Code requests will continue to route for approval under Approve/Review Forms

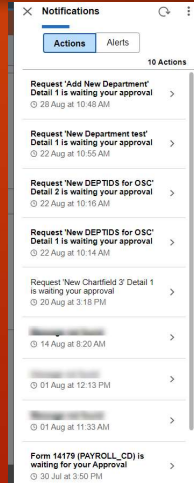
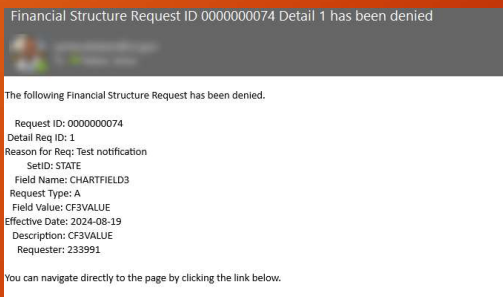
The screenshot shows the 'General Ledger and KK' dashboard. The 'Approvals' tile is highlighted with a red box. The 'Structure Request' tile is also highlighted with a red box. A 'Pending Approvals' pop-up window is shown on the right, displaying a list of pending items:

Pending Approvals	
View By	Type
All	12
Journal Entry	10
Structure Request	2

- Approvals will be accessed under the new General Ledger and KK dashboard tiles
- Users will have the same roles with Structure Requests as they did with Chartfield Requests
- Journal Approvals can still be accessed through Journal Approvals menu under GL

Approval/Deny - Notifications

- Structure Requests, Journal Approvals, and Project, & Payroll Acct forms will all provide Notifications for approval through the Notifications bell and through email



- Project and Payroll Account Code forms remain unchanged
- All will use the Notifications bell and alerts

New Chartfield Value - Chartfield 3

- Chartfield for State-Wide Reporting
 - Created only by central agencies (OPM, OSC)
 - Will be useable by all agencies on transactions
 - Expenditures
 - Contracts, Purchase Orders
 - Vouchers
 - Payroll
 - Bills
 - Deposits
 - Journal Entries, Coding Corrections
 - Examples for Use
 - IT Capital Investment Program
 - Cannabis
 - Sports Gambling
 - Covid
 - Storms
 - Will appear across the system with go-live of upgrade
 - Payroll Account Codes (Combo Codes) will be available for Chartfield3

-Chartfield 3 will be like Chartfield 2 with the exception of agencies cannot create their own Chartfield 3 values.

-Agencies will not be able to create their own chartfield 3.

-Chartfield 3 will be useable on transactions for Expenditures and Revenue (Vouchers, Payroll, Purchasing, Bills, Deposits, Journal Entry)

Questions...



Grants Management

Vanessa Hoang

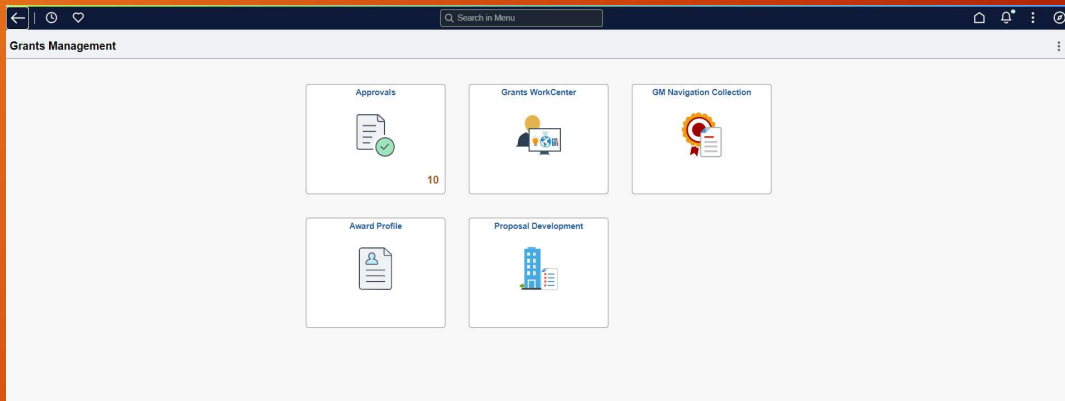
Grants Agenda

- Grants Fluid Homepage
- Grants Approval
- Grants Approval - Approve/Deny
- Grants Approval Bell Notifications
- Grants Navigation Collections
- Grants WorkCenter



Overview of GM agenda

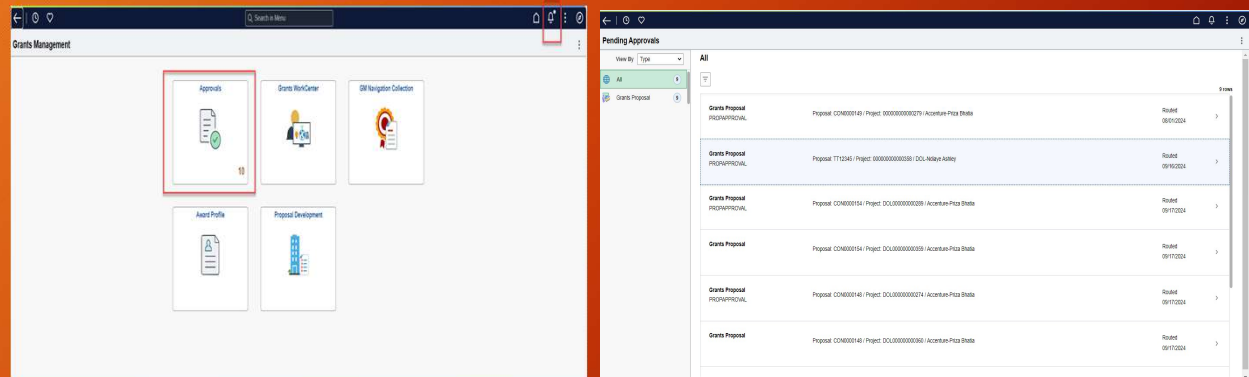
Grants Fluid Homepage



- Grants homepage include high frequency use functionalities
- Collection of grant components
- New feature include approval workflow (AWE)

Grants Approval

- Approval are through new approval tile
- Pending approval page from approval tile



- Agency user can create grant proposal and then use approval process with approvers and reviewers within the approval workflow.
- Approvers can access the pending approvals using the Approvals tile
- Pending approval will provide a list of your pending approvals
- This is all based on current approval security roles

Grants Approval - Approve/Deny

Grants Proposal

In Progress

Proposal Component

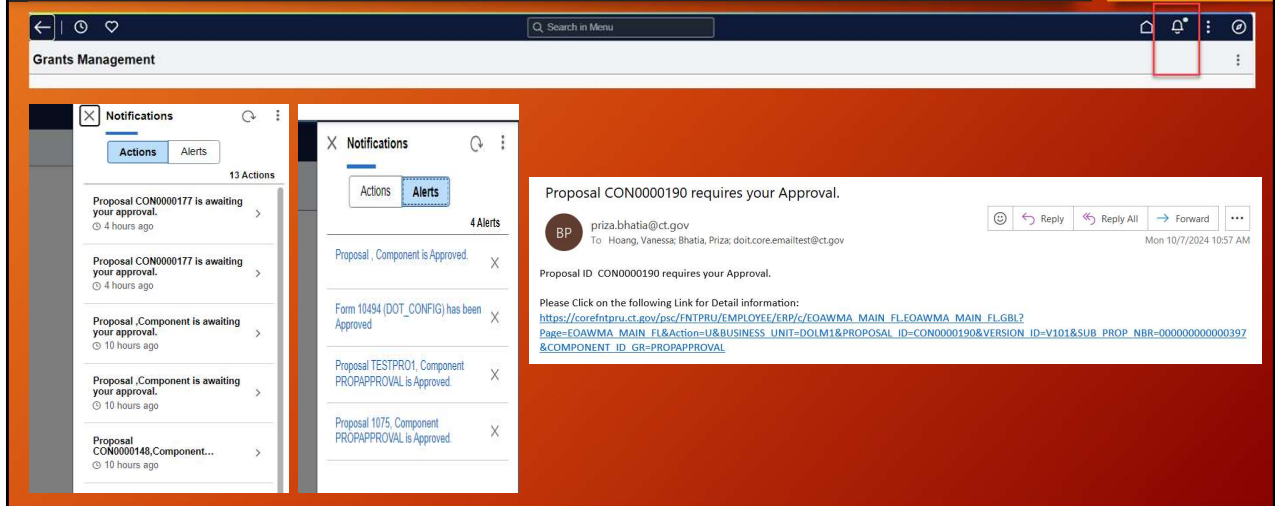
Proposal	CON000181	Proposal Status	Pending Approval
Version	V101	Title	FY24 Foreign Labor
Project	DOL0174FLF24	Project Description	FY24 Foreign Labor
Component	PROPAPPROVAL	Component Status	In Progress

Approver Comments

Approval Chain >

- This will enable different users approve or deny requests.
- User can review and approve/deny the proposal
- Approve- system will prompt you to provide comments (no comment necessary). Approval will routes to next approvers
- Deny – system will prompt you to provide comment, you will need to provide comments for denial. Denied will remove the proposal from approval chain.

Grants Approval Bell Notifications



Notification Action: once approve or deny, item will clear from list

Notification Alert: Review actions have been taken. User manual maintain the list by (X) remove item from list

User will receive email notification which link will send you to pending approval page as well

Grants Navigation Collection

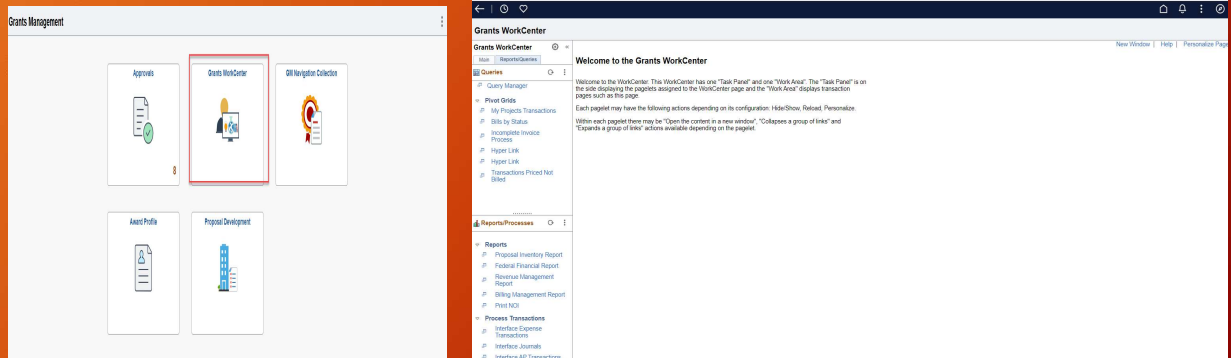
- Allow you quickly access links to various pages

The image displays two side-by-side screenshots of a web application interface. The left screenshot, titled "Grants Management", shows a dashboard with six tiles: "Approvals", "Grants WorkCenter", "Grants Navigation Collection" (highlighted with a red border), "Award Profile", and "Proposal Development". The right screenshot, titled "Grants Lifecycle", shows the "Award Summary" page. It includes a navigation menu on the left with items like "Manage My Awards", "Grants Portal Award Summary", "Award Profile", "Project Budgets", "Review Award Transactions", "Manage My Proposals", "Award Billing", "Award Closeout", "Grants Reporting", "Grants Center", and "Grants WorkCenter". The main content area displays "Financial Calculating Option" settings, including "Balances" set to "Both", "Include FA" checked, "Budget Period From" and "Through" search boxes, "Date Selection" set to "As of Date", and a "Recalculate" button. A "Burn Rate Indicator" on the right shows "Potential Under Spending" (green), "Average Rate Spending" (yellow), and "Potential Over Spending" (red).

- Grant navigation collection enables users to access frequently used Grants components from a single place
- The left side of this page lists the components; the right side will display the component selected in the left side.

Grants WorkCenter

- Central place for user to access various pages and perform task more easily



- Grants workcenter is used to support user through lifecycle of the grant.
- Central navigation component that can help user access frequently used pages
- Enable you to access key transactional data, notification, exceptions, reports and queries related to grants

Project Costing Customer Contract

Vanessa Hoang

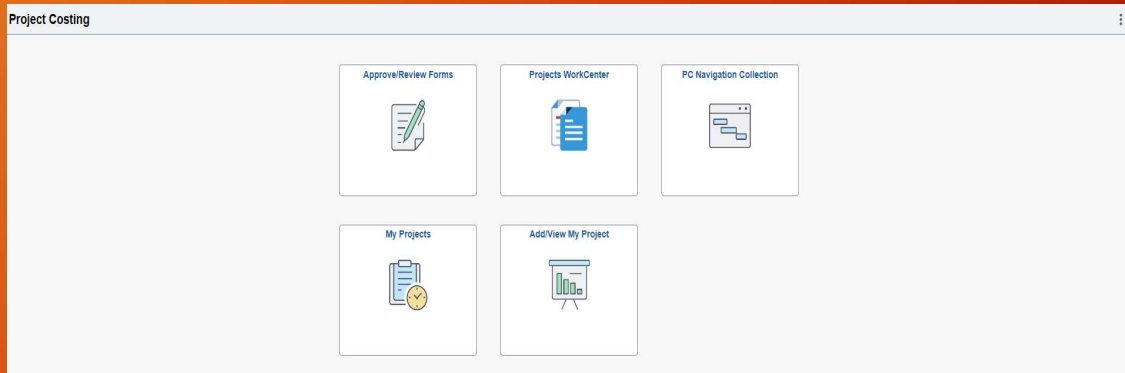
Agenda

- Project Costing Homepage
- PC Forms Configuration
- Customer Contract homepage
- PC/CA Navigation Collection
- PC/CA WorkCenter



Overview of Project Costing and Customer Contract agenda

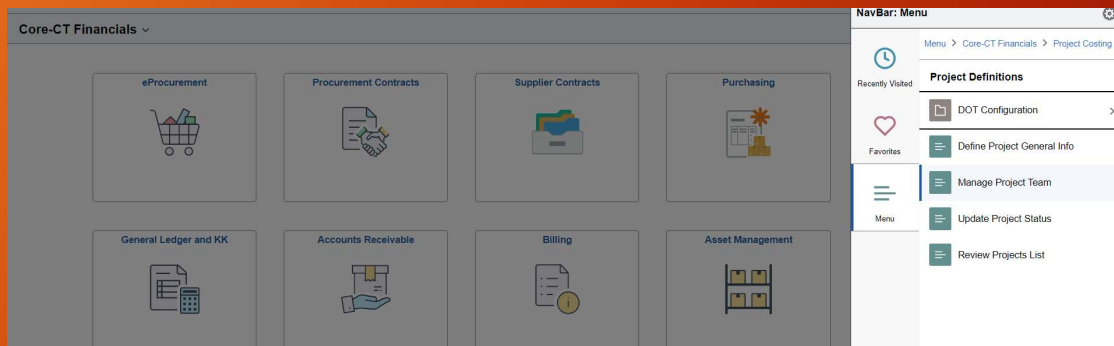
Project Costing Homepage



Project Costing homepage provide quick access to frequently use functionalities

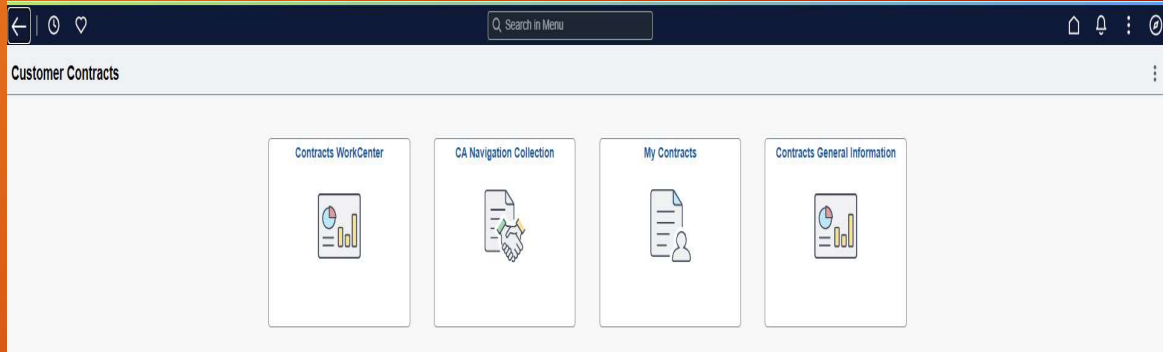
PC Forms Configuration

- An example of an item can only access through nav bar menu is PC forms



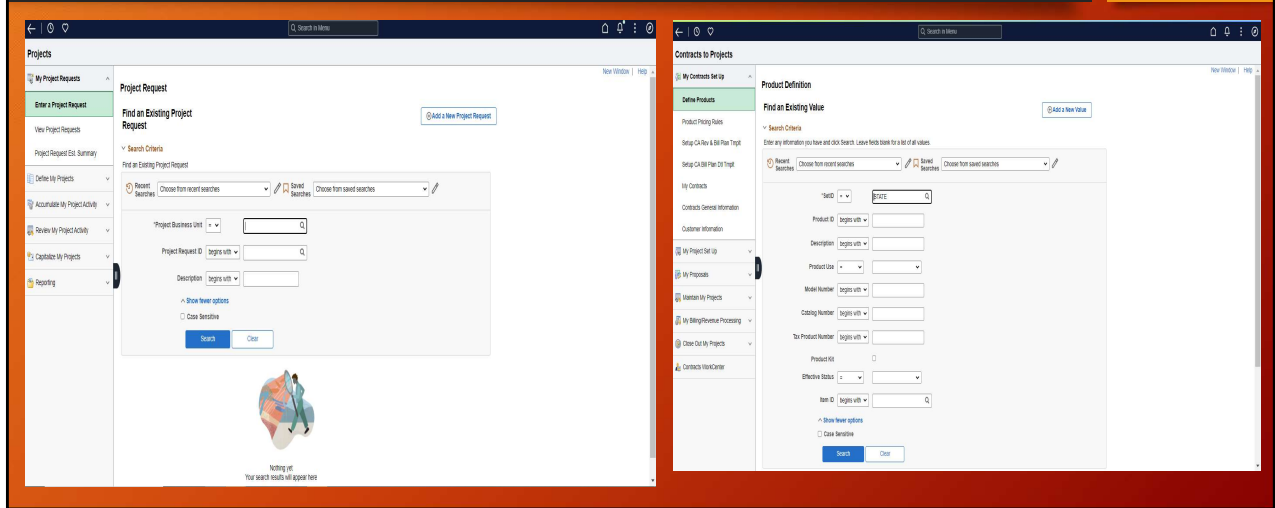
Many components would be available through tiles but there are some components can only navigate through nav bar menu. An example is form configuration

Customer Contract Homepage



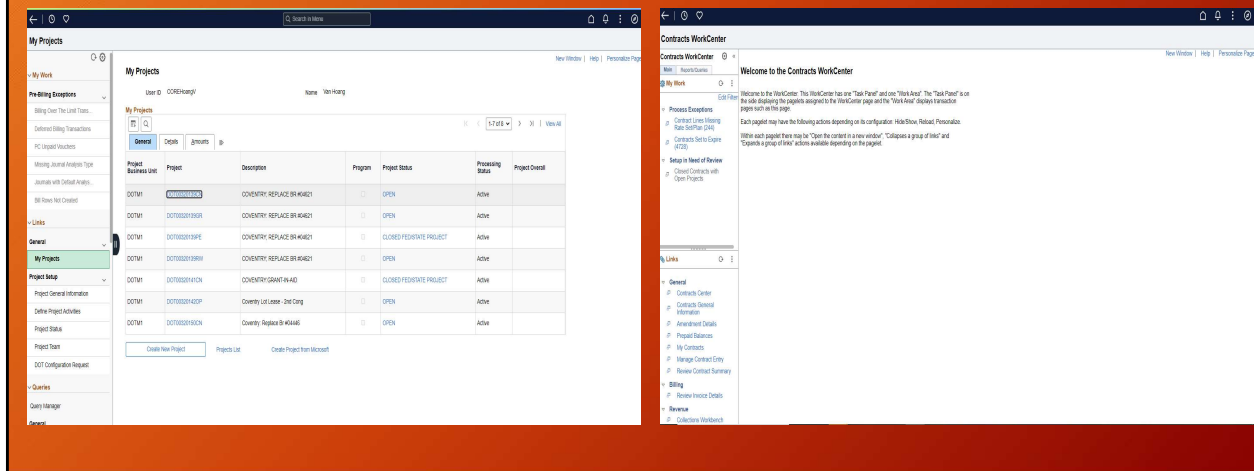
Customer Contract homepage provide quick access to frequently use functionalities

PC/CA Navigation Collection



Navigation Collection: grouping of commonly use pages/links that would support user tasks

PC/CA WorkCenter



Workcenter: design for users to efficiently utilize frequently use pages for daily/weekly tasks

The right side of the page has been configured as a dashboard and displays specific pagelets that provide user info as soon as they access the workcenter

Some sections in workcenter are:

Links- minimize the number of clicks to access certain pages

Queries- provide access to public queries, private queries

Reports/processes- provide access to reports and processes user has access

to

Questions...



EPM/STARS

Wendy Monk

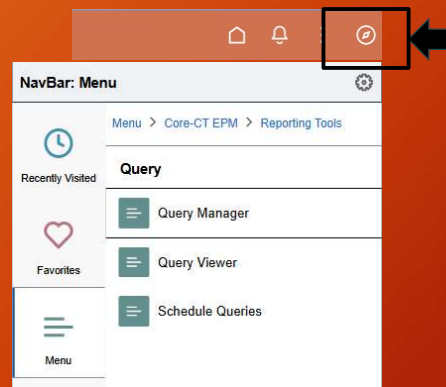
EPM/STARS Agenda

- EPM Navigation
- EPM PUM Favorites
- STARS Navigation



EPM Navigation

- Navigation: Main Menu > Core-CT EPM > Reporting Tools > Query



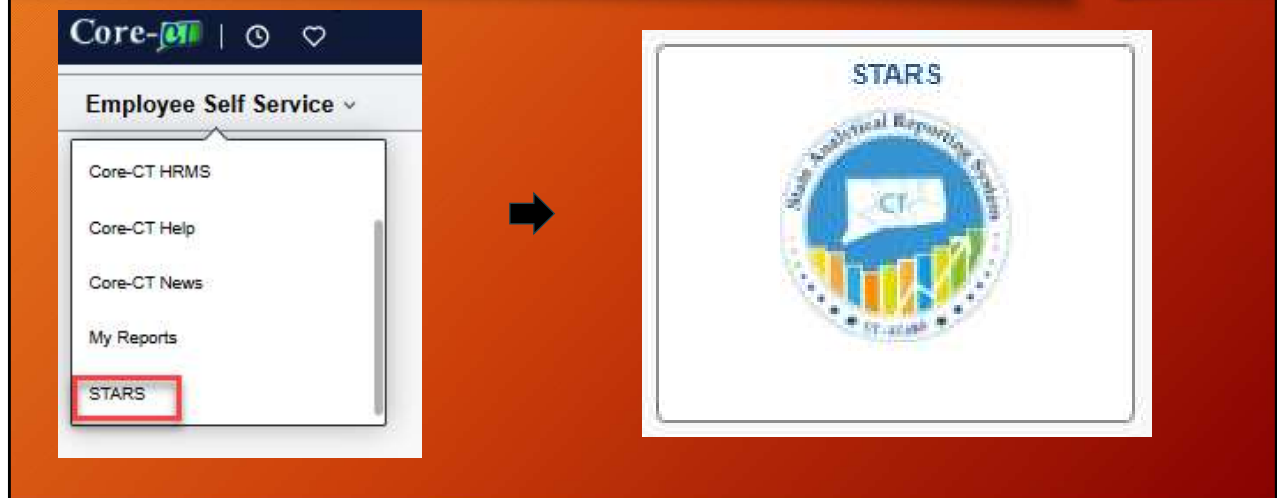
The Navigation to EPM remains the same except the NavBar is on the right-hand side of the page.

EPM PUM Favorites

- Run Controls will not be deleted.
- Pre-scheduled report or queries will have to be re-scheduled.
- Private queries will not be deleted.
- EPM Query Favorites *will* be erased.



STARS Navigation



The new Navigation to STARS is the Left drop down, then click the STARS tile

Questions...

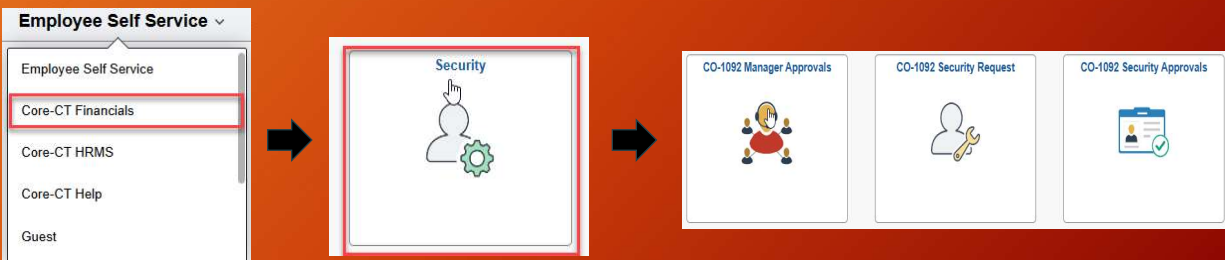


Security

Dustin Guarino

Security - CO-1092's

- The new Security CO-1092 navigation and approvals



The security CO-1092 navigation and approvals have changed. There are now tiles.
Navigation: Core-CT HRMS > Security
You will be able to choose the next tile based on your roles.

A new Financials Security tile will be available for those users that have security roles. It can be found by selecting Core-CT Financials from the drop down menu. Here users assigned the CT_CO1092_LIAISON role can access the CO-1092 Security Request tile to create Fin CO-1092's. Users assigned the CT_CO1092_APPRV_MGR will be able to access the CO-1092 Manager Approvals tile to approve CO-1092's at the agency level. The 2 pages themselves will function the same as they did prior to this upgrade.

Questions...



Help Desk

Shanon Reutter

Agenda

- FootPrints
- Core-CT Website
- Clearing Cashe/Browser Info
- Reminders



FootPrints

- URL: <https://footprints.ct.gov/footprints>
- Routes Directly to the Team
- FootPrints Access
- Readiness@ct.gov (anyone without a ct.gov email address)



We encourage everyone to Log a ticket – Help desk answers tickets as quickly as possible when the tickets are submitted.

Keep an eye out for emails when you have a ticket open; the help desk will communicate through the ticket.

You can respond to the email from FootPrints and FootPrints attaches the email to the ticket and notifies the help desk that you have responded.

FootPrints Routing – The tickets are routed directly to the team that handles the module for faster processing.

FootPrints Access – If you are in the need of FootPrints access, please email the readiness mailbox with the subject FootPrints Access.

Readiness mailbox – If you have an email address that does not end in ct.gov, you can email the readiness mailbox for the Help Desk to create a FootPrints ticket on your behalf.

Again, please watch for emails from FootPrints; even though you don't have FootPrints access, you can still respond to the email and it will attach all emails to the ticket and will also notify the Help Desk you have responded.

Please refrain from reaching out to the module leads as we need to document every issue

that come in.

Core-CT Website

<https://www.core-ct.state.ct.us>

The screenshot displays the Core-CT website interface. The top navigation bar includes the State of Connecticut logo, Governor Ned Lamont's name, and the Core-CT HRMS/FINANCIALS/REPORTING SYSTEM logo. The main content area is divided into two sections. The left section, titled "Core-CT Modernization", features a "Useful Links" box with links to "Core-CT Agency Appointed Change Agents" and "Core-CT PUM Upgrade Training Registration", and a "Change Agent Meetings" table. The right section, titled "Core-CT PUM Upgrade Training Registration", provides instructions for registering for L200 courses and includes a table of available courses.

Module	Course & Prerequisites	Description	Sessions
HR	L200 Managing Job ----- Prerequisite: L100 HR Navigation Overview	Upon completing this course, participants will be able to administer HR processes to maintain employee jobs, status, and data, hire and rehire an employee, dual employment processing, maintain employee job information/data, salary increases, transferring an employee, and supervisor changes. Role: HR Specialist (.pdf) - L200 Managing Job Deck Recording (.mp4) - L200MJOB2 Managing Job Recording 10-07-24 (.pdf) - L200MJOB2 Managing Job Transcript 10-07-24 (.pdf) - L200 Managing Job Q&A	L200MJOB2 Oct 7, 9:00-11:00 AM L200MJOB1 Oct 9, 9:00-10:00 AM
HR	L200 Personal Data ----- Prerequisite: L100 HR Navigation Overview L200 Managing Job	Upon completing this course, participants will be able to access Fluid files related to modify person, create employee, create person of interest, and organizational relationship, administer processes to update employee personal data, and create organizational relationships. Roles: HR Specialist, Retirement Payroll	L200PD002 Oct 19, 9:00-10:00 AM L200PD001 Oct 24, 1:00-2:00 PM

The Core-CT Modernization Page is where you will find all of the decks from previous Change Agent Meetings along with Recordings, Transcripts and Q&A's.

There is a link for the Core-CT PUM Upgrade Training Registration page that contains the L100 classes, all the previous class Recordings, Transcripts, Q&A's and if there is any class available to register for.

eLearning Modules: 10-15 minute training modules that can be viewed at any time, at your own pace. The steps can be saved as a PDF for your own reference.

Instructor-Led Modules: L200 courses that cover more complex topics and are currently available as instructor-led training sessions lasting up to two hours. These will become available in the latter part of October as recorded courses to be viewed at your own pace.

Core-CT Website

<https://www.core-ct.state.ct.us>

Core-CT PUM Upgrade Training and Support

The recent upgrade of the Core-CT system has resulted in the modification of many of its procedures. The following training and support materials are available:

Infographics:	One-page documents that recap cross-module topics such as Navigation and Approvals.
Job Aids:	Printable documents outlining the business process and steps within Core-CT.
eLearning Modules:	10-15 minute training modules that can be viewed at any time, at your own pace. The steps can be saved as a PDF for your own reference.
Instructor-Led Modules:	L200 courses that cover more complex topics and are currently available as instructor-led training sessions lasting up to two hours. These will become available in the latter part of October as recorded courses to be viewed at your own pace. Click here to register.

FINANCIALS

Click on a module to access its support materials.

Cross Module	Customer Contracts	PCard
Accounts Payable	eProcurement	Procurement Contracts
Accounts Receivable	eSupplier	Project Costing
Asset Management	Gen. Ledger / Commitment Control	Purchasing
Billing	Grants	Strategic Sourcing
Catalog Management	Inventory	Supplier Contract Management

HCM

Click on a module to access support materials.

Cross Module	Kronos
Benefits	Payroll
Human Resources	Time and Labor
Teachers Retirement Board	

EPM

Currently no support materials available.

There is also a new link on the modernization page for Core-CT PUM Upgrade Training and Support.

Here you will find Infographics which are one-page documents that recap cross-module topics such as navigation and approvals.

You will also find job aids which are printable documents outlining the business process and steps within Core.

You will find eLearning Modules which are 10-15-minute training modules that can be viewed at any time, at your own pace. The steps can be saved as a PDF for your own reference.

You will find Instructor-Led Modules which are the L200 courses that cover more complex topics and are currently available as instructor-led training recordings that can be viewed at your own pace.

Clearing Cache/Browser Info

- Clear your Cache <https://www.core-ct.state.ct.us/help.html>
- Use a new window with Inognito browsing
- Use a new In Private window in Edge



It is important to Clear your browser cache, especially when logging into Core-CT for the first time after the upgrade. You should also clear your cache anytime something doesn't look right to you because one of the first things the help desk will ask you to do or will ask you if you have cleared your cache.

If you are having problems with your browser, you can also use a new window with "Inognito" browsing or use a "In Private" window in Microsoft Edge

Reminders

- Favorites WILL NOT carry over
- Run Controls WILL carry over
- Scheduled Reports/Queries will need to be Re-scheduled
- Obsolete Devices
 - All devices must have an up-to-date browser to properly access Core-CT
 - Device Operating System software and App/Play Stores must be up-to-date to update browser apps
 - If a manufacturer stops supporting a device, then it won't be able to update



Just a few reminders:

Favorites will not carry over with the upgrade
Run Controls will carry over with the upgrade
Punchout will not be available on mobile devices
Scheduled Report/Queries will need to be Re-Scheduled

Also, Obsolete Devices...

- 1 All devices must have an up-to-date browser to properly access Core-CT
2. Device Operating System software and App/Play Stores must be up-to-date to update browser apps
3. If a manufacturer stops supporting a device, then it won't be able to update

Questions...



Closing

Brianne McKenna

Closing

Thank You

for your participation today. We hope this information proved helpful.



Look for this presentation on the Core-CT website

<https://www.core-ct.state.ct.us>

Please share this information with your co-workers.

Glossary of Fluid Terms

- **APPLIES TO HR AND FIN**

- **Homepages:** Homepages are the starting point for navigation in fluid. The Employee Self-service (ESS) is the default homepage that displays after login; users will use the homepage drop down to navigate to different homepages, based on their roles.
- **Dashboard:** a dashboard is a specific module page, that organizes functionality, which can be accessed via a tile.
- **Tiles:** tiles are buttons found on fluid homepages and dashboards, when clicked they link to common business transactions and high action functionality.
- **Notifications Panel:** users can access the notification panel, to view Actions and Alerts, which replaces the Worklist. Users can also adjust settings, refresh the notification window, open a transaction, mark an action complete, or dismiss an alert.



- **Global Search:** global search can be accessed, to perform keyword-based searches.
- **Fluid Pages:** Fluid Pages are a new interface that adds tiles to homepages for navigation instead of cascading pagelets or menus. Fluid is a responsive user interface that works on desktops, tablets, and phones
- **Fluid Banner:** a standard banner, appears at the top of every fluid page, the fluid banner provides access to buttons such as favorites, home, and other standard buttons.
- **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.
- **Fluid:** fluid is a standard user interface, that provides users with the ability to access applications in a variety of ways, including smartphones, tablets, desktops and laptops.
- **FIN ONLY**
- **Navigation Collection:** the navigation collections. Collection of content menu items and content reference folders in one centralized location by module.