

PCard

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Requests for Coordinators are done through CORECT security. This allows for an online approval process removing the need for paperwork.	1
Since coordinators work with both the P-Card administrators and their agency with their procurement cards, the maintain coordinator page provides basic information for ease of setup.	Error! Bookmark not defined.
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PCard Coordinator Maintenance



Overview

Requests for Coordinators are done through CORECT security. Once the role has been added to the user, the maintain coordinator page is used to maintain information.

Coordinator Request

New Coordinator Request

When an agency decides to add a new coordinator, their security liaison must complete a security request with the CT_F_A_CC_Coordinator role.

Navigation: Main Menu > Core-CT Financials Purchasing > PeopleTools > Security > CO-1092 Security > CO-1092 Security Request

(Sample below)

The screenshot shows the Oracle PeopleTools interface for a Security Request. The breadcrumb trail is: Favorites > Main Menu > PeopleTools > Security > CO-1092 Security > CO-1092 Security Request. The page title is "CO-1092 Security Request" and "Comments".

Transaction No. **Transaction Date** 08/21/2017 **Workflow Status**

Request Details

*User ID	PolitoJ	*Manager User ID	HechtE
Empl ID	048880	Manager ID	492452
Name	Polito,Jeffrey W.	*Manager Name	Hecht,Evette
Email ID	doit.core.emailtest@ct.gov	Manager E-mail	doit.core.emailtest@ct.gov
Telephone	203/974-7018	Primary Permission	PPFNMHAMALL
DEPTID	MHA54350		Edit Business Units

[View Existing Roles](#)

Security Roles (Add/Delete) Personalize | Find | View All | First 1 of 1 Last

*Role Name	*Role Actions	Description
1 CT_F_A_CC_COORDINATOR	Add	This is a Valid Role.

[Submit](#)

[Save](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#) [Correct History](#)

CO-1092 Security Request | Comments

Note: A request may have additional roles on it

Once the request has been approved by the Agency, it will be routed to the P-Card Administrators for approval and an email will be generate

To go to the request, click on the email request hyperlink
NOTE: The link may require signing into CORECT first.

A sample email is below

-----Original Message-----
 From: roger.persson@ct.gov [mailto:roger.persson@ct.gov]
 Sent: Wednesday, May 10, 2017 2:45 PM
 To: St. Amand, Philip; Dimatteo, Kerry; Velez, Carlos
 Subject: The FIN CO-1092 Security Request for 505574 (Calvi, Frank A) requires your approval.

The following CO-1092 Security Request form has been submitted for approval:
 Transaction: 8338
 Date: 2017-05-10
 User ID: 505574
 Employee ID: 505574
 Name: Calvi, Frank A
 Manager ID: 596496
 Manager Name: Persson, Roger L.
 Security Liaison: ThompsonMa

Agency Approving Managers can navigate to: Core-CT Financials > PeopleTools > Security > CO1092 Manager Approvals

Core-CT Approvers can navigate to: Core-CT Financials > PeopleTools > Security > CO1092 Security Approvals OR click on the link below:
https://corect.ct.gov/psp/PEPRD/EMPLOYEE/ERP/c/CT_CO1092.CT_CO1092_APPROVE.GBL?Action=U&TRANSACTION_NBR=8338&TRANSACTION_DT=2017-05-10&OPRID=505574

Note: Please do not reply to this email. This mailbox does not allow incoming messages.

Alternate Navigation: Worklist

Log into CORECT then click the Worklist hyperlink on the upper right hand side of the page. A list of worklist items will appear.

The screenshot shows the Oracle Worklist interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', and 'Worklist'. Below this is the Oracle logo and a search bar. The main content area is titled 'Worklist' and shows 'Worklist for DimatteoK: DAS-Dimatteo Kerry'. There are options for 'Detail View' and 'Worklist Filters'. Below this is a table of work items:

From	Date From	Work Item	Worked By Activity	Priority	Link	
MIHA-Hecht Evette	08/21/2017	Approval Routing	Approval Workflow	3-Low	CT_CO1092_47357_SHARE_1903- TRANSACTION_NBR_8644 TRANSACTION_DT_2017-08-21 OPRID_PolitoJ RDC:RA 0 A	Mark Worked / Reassign

Click on the hyperlink for the appropriate request.
 Security requests on the worklist will start with CT_CO1092

Once the request has been selected the following will display

Oracle Worklist > Worklist > CO-1092 Security Approvals

Comments

Transaction No. 8644 Transaction Date 08/21/2017 Workflow Status In Approval Process

Request Details

*User ID PolitoJ *Manager User ID HechtE
 Empl ID 048880 Manager ID 492452
Name Polito, Jeffrey W. *Manager Name Hecht, Evette
 Email ID doit.core.emailtest@ct.gov Manager E-mail doit.core.emailtest@ct.gov
 Telephone 203/974-7018 Primary Permission PPFNMHAMALL
 DEPTID MHA54350 [Edit Business Units](#)
[View Existing Roles](#)

Security Roles (Add/Delete) Personalize | Find | View All | First 1 of 1 Last

*Role Name	*Role Actions	Description
1 CT_F_A_CC_COORDINATOR	Add	This is a Valid Role.

Approve Deny

Route to Approving Manager

TRANSACTION_NBR=8644, TRANSACTION_DT=2017-08-21, OPRID=PolitoJ:Approved

Manager Approval

Approved
 ✓ MHA-Hecht Evette
 CO-1092 Approving Manager
 08/21/17 - 10:00 AM

P-Card Coordinator Approvers

TRANSACTION_NBR=8644, TRANSACTION_DT=2017-08-21, OPRID=PolitoJ:Pending

P-Card Coordinator Approvers

Pending
 ⌚ Multiple Approvers
 CO-1092 Approver 10

Route to Core-CT Sec Admins

TRANSACTION_NBR=8644, TRANSACTION_DT=2017-08-21, OPRID=PolitoJ:Awaiting Further Approvals

Core-CT Security Admins

Not Routed
 📁 Multiple Approvers
 Core-CT Security Admins

Save Return to Search Notify Update/Display Include History Correct History

CO-1092 Security Approval | Comments



Review the Request and either approve or deny the request.

P-Card Administrators are only approving the Coordinator role. Any other roles within the request will be handled by the appropriate approvers.

Once the request has been complete by CORE-CT Security Admin, the role is active in CORE.



Removing the Coordinator Role

When it is necessary to remove the coordinator role, the agency's security liaison must complete a security request with the CT_F_A_CC_Coordinator role. However, on this request, the liaison will select Delete for the Role Action signifying the role is to be removed.

The approval process is the same as a request for role.

The new/alternate coordinator will be responsible for removing the proxies for the removed coordinator. Refer to the job aid on Proxies for more information.

The screenshot shows the Oracle PeopleTools interface for a CO-1092 Security Request. The breadcrumb trail is: Favorites > Main Menu > PeopleTools > Security > CO-1092 Security > CO-1092 Security Request. The page title is "CO-1092 Security Request" and "Comments".

Transaction Information:
Transaction No. [blank] | Transaction Date: 08/21/2017 | Workflow Status: [blank]

Request Details:

*User ID	PolitoJ	*Manager User ID	HechtE
Empl ID	048880	Manager ID	492452
Name	Polito, Jeffrey W.	*Manager Name	Hecht, Evette
Email ID	doit.core.emailtest@ct.gov	Manager E-mail	doit.core.emailtest@ct.gov
Telephone	203/974-7018	Primary Permission	PPFNMHAMALL
DEPTID	MHA54350		Edit Business Units

[View Existing Roles](#)

Security Roles (Add/Delete) | Personalize | Find | View All | [Grid Icon] | [Print Icon] | First | 1 of 1 | Last

*Role Name	*Role Actions	Description
1 CT_F_A_CC_COORDINATOR	Delete	This is a Valid Role.

Buttons at the bottom: Save, Notify, Add, Update/Display, Include History, Correct History.

Page footer: CO-1092 Security Request | Comments

Maintain Coordinators

Once the Coordinator is in CORECT, the Maintain Coordinators page is used to setup information about the coordinator.

Navigation: Main Menu > Core-CT Financials > Purchasing > Procurement Cards > Administration > Maintain Coordinators

Favorites ▾ Main Menu ▾ > Purchasing ▾ > Procurement Cards ▾ > Administration ▾ > Maintain Coordinators

ORACLE

All ▾ Search >> Advanced Search Last Search Results

Maintain Coordinator

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▼ Search Criteria

Empl ID begins with ▾ [] 🔍

Name begins with ▾ [] 🔍

Department begins with ▾ [] 🔍

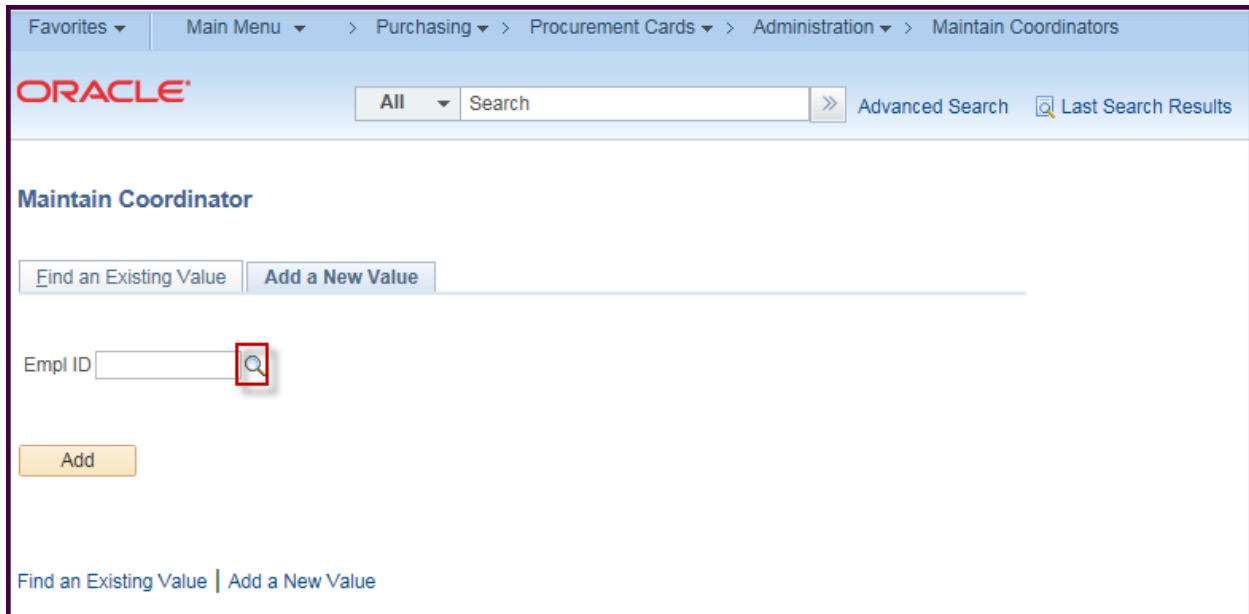
Case Sensitive

Limit the number of results to (up to 300): [300]

Search Clear Basic Search 🔍 Save Search Criteria

Find an Existing Value | Add a New Value

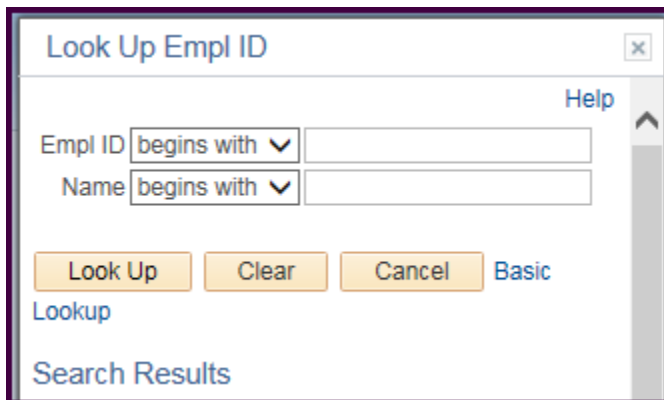
For a new Coordinator, click the Add a New Value



Enter the employee id and click Add.

If the id number is unknown, click the magnifying glass to open the search window to search by Name.

NOTE: Only employees that have the Coordinator role can be added. If the name does not come up in the search view, verify the employee has the CT_F_A_CC_Coordinator role (Contact CORE-CT help desk)



Select the Name and click Add

The Maintain Coordinators Page displays

Favorites ▾ Main Menu ▾ > Purchasing ▾ > Procurement Cards ▾ > Administration ▾ > Maintain Coordinators

ORACLE® All ▾ Search [] >> Advanced Search [] Last Search Results []

Maintain Coordinators
Procurement Card

Empl ID 505598 Alexander, Dawn

Business Unit [DCFM1] [] Central Bill # [] []

Email ID [doit.core.emailtest@ct.gov] []

Phone [] Ext []

Fax []

Department [] Find | View All | First [] 1 of 1 [] Last []

Status [Active] ▾ []

Department [] []

Approval Level [Main] ▾

Address Line 1 [Central Office - Accounts Payable] []

Address Line 2 [505 Hudson Street] []

City [Hartford] [] State [CT] [] Postal Code [06106] []

Receive Bank Statement

Receive Email Notification

Comments [] Personalize | Find | View All | [] [] First [] 1 of 1 [] Last []

Entered by	Entered Date	Comment
		[] [] []

Entered by [] Last User to Modify []

[Save]



Enter the Contact information for the Coordinator

Field	Description
Business Unit	Defaults from their profile – Change if necessary
Central Bill #	Select the Billing Account from the List
Email ID	Defaults from the user profile, update if necessary
Phone Number	Enter the contact phone number
Ext.	Enter the phone extension
Fax	Enter the fax number

Enter the Department Information

If the Coordinator has several departments/addresses, they can be entered by clicking the +

Field	Description
Status	Select from Active or Inactive (Default is Active)
Department	Select the Department from the drop down list
Approval Level	Select from Main, Both, Backup (Default is Main)
Address Line 1	Defaults from BU, update if necessary
Address Line 2	Defaults from BU, update if necessary
City	Defaults from BU, update if necessary
State	Defaults from BU, update if necessary
Postal Code	Defaults from BU, update if necessary

Check Boxes

Field	Description
Receive Bank Statement	Check – Informational Only
Receive Email Notification	Check – Informational Only

Comments

Enter any comments.

Click Save when all information has been completed.

EXTERNAL: P-Card Administrators add/remove access to Payment Net (JPMC bank system) for the Coordinator.

Maintain Coordinator Page – Changing or Inactivating

Navigation: Main Menu > Core-CT Financials > Purchasing > Procurement Cards > Administration > Maintain Coordinators

The screenshot shows the Oracle 'Maintain Coordinator' page. At the top, there is a breadcrumb trail: Favorites > Main Menu > Purchasing > Procurement Cards > Administration > Maintain Coordinators. Below this is the Oracle logo and a search bar with a dropdown menu set to 'All' and a search button. An 'Advanced Search' link is also present. The main heading is 'Maintain Coordinator', followed by the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' and 'Add a New Value'. A 'Search Criteria' section is expanded, showing three search fields: 'Empl ID' (dropdown: 'begins with'), 'Name' (dropdown: 'begins with'), and 'Department' (dropdown: 'begins with'). Each field has a magnifying glass icon. Below these fields is a 'Case Sensitive' checkbox and a 'Limit the number of results to (up to 300):' field with the value '300'. At the bottom of the search section are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. At the very bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

Enter the search criteria. If further detail is needed, click on the magnifying glass for more search options.

When the correct Coordinator is selected, click the search button.

The Maintain Coordinators page will display

Maintain Coordinators
Procurement Card

Empl ID 622254 Carilli, Doris J.

Business Unit Central Bill # 8000 DEPT OF CORRECTION

Email ID

Phone Ext

Fax

Department Department of Correction

Status

Approval Level

Address Line 1

Address Line 2

City State Postal Code

Receive Bank Statement
 Receive Email Notification

Entered by	Entered Date	Comment
118920	07/22/15 12:00AM	activated Doris and she will be receiving the bank statement from JPMC. ksd

Entered by 118920 07/22/2015 12:00:00AM Last User to Modify 4372 07/22/2015 12:00:00AM

Make the appropriate changes.

If the coordinator role has been removed from the user, update the status to Inactive.

Click the + sign to add a comment.

Click Save when the changes are done.

EXTERNAL: P-Card Administrators add/remove access to Payment Net (JPMC bank system) for the Coordinator.