

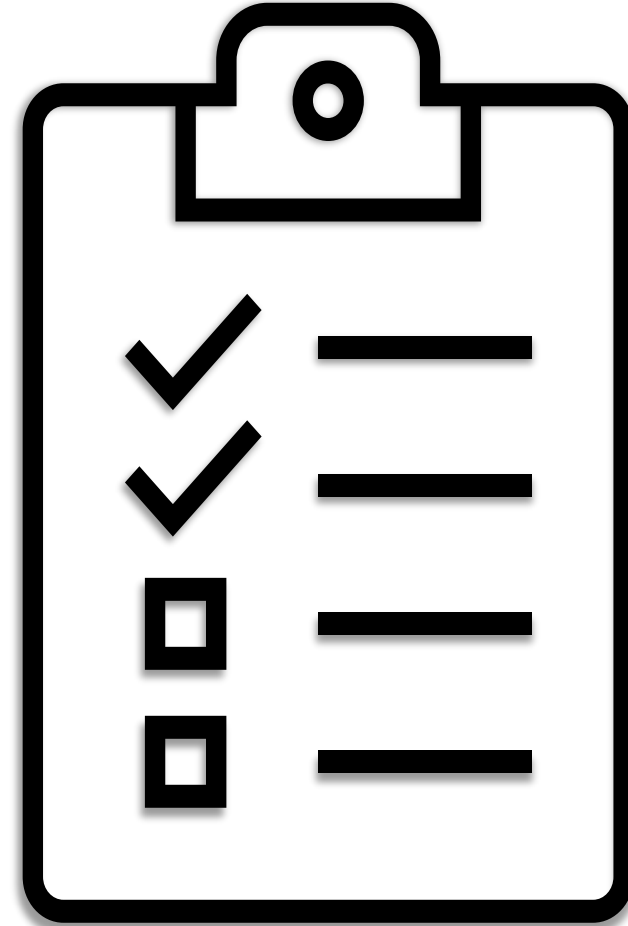


# Core-CT Modernization User Group Change Agent Kickoff

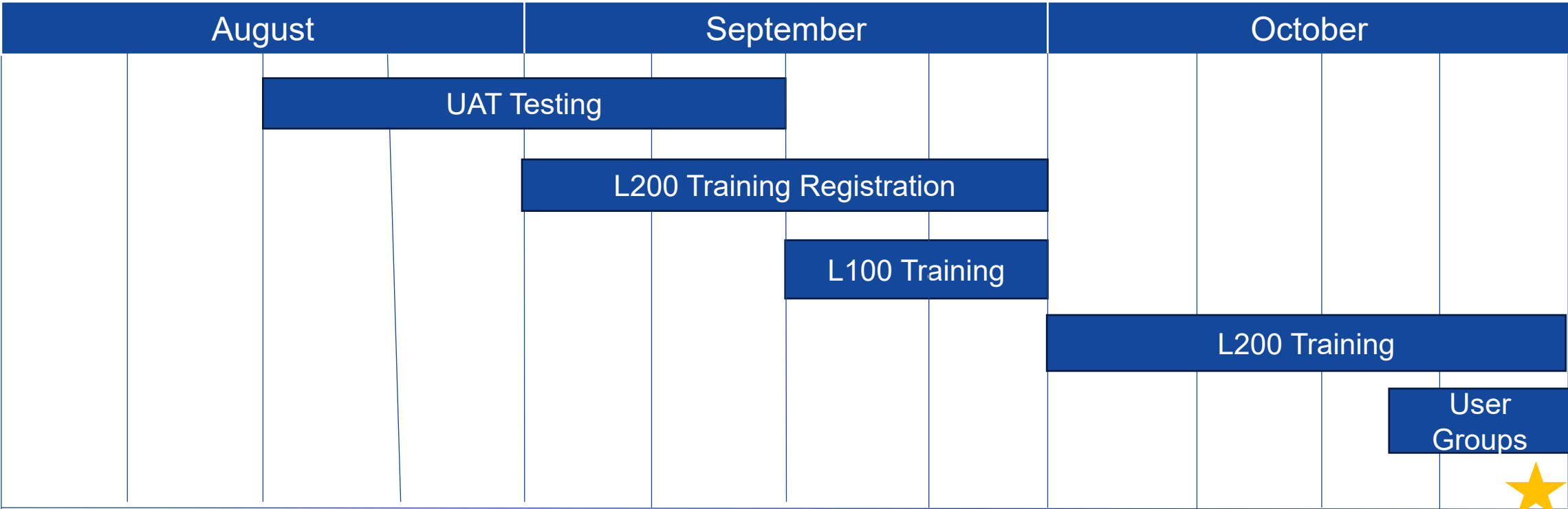
August 27, 2024

# Agenda

- Welcome
- Timeline
- UAT Update
- Training Registration
- Training Approach & Curriculum
- Go Live Readiness
- Modernization & Training Page Updates
- Reminders & Questions



# UAT & Training Deployment Schedule



- L200 Training Registration to begins **early September**
- L100 Training Completion should occur **September 16 – October 1**
- L200 Training Delivery will occur **October 1 – October 30**

# User Acceptance Testing Update



UAT runs from August 12 through September 13



UAT has ~500 testers participating



UAT weekly meetings with testers to review issues



UAT testers reference the UAT Support Page: [Modernization Page](#)



UAT has resulted in minimal issues (log-in, security, and navigation)

*Thank You!*

# Training Registration for L200

Change Agent receive course mapping

- Receive an email with agency role to course mapping list, curriculum, and training delivery schedule

Change Agent acts as PoC

- Act as point of contact and distribute information for training details for your agency

Users receive registration

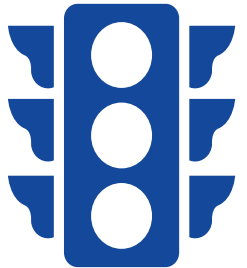
- Receive a MS Teams Registration Link for L200 courses – via Daily Mail, Modernization Page, Other locations TBD

Users register for L200

- Register for L200 courses – each user registers for their respective L200 courses

Change Agent assesses readiness

- Assess “Agency Readiness” – Training Participation will be tracked by Agency & Attendance Lists will be shared



# Training Approach

Utilizing a blended approach with multiple mediums is recommended to address the variety of learning needs of the PUM stakeholders

	Training Delivery Experience		Performance Support
	Level 100 Courses All Core-CT Users	Level 200 Courses Specialized Core-CT Roles	E-learning Self-Study and Practice
<i>Please consider access for users without a PC</i>			
<b>Overview</b>	<b>E-Learning</b> supported by Job Aids	<b>Virtual Instructor-Led Training</b> supported by Participant Guides and Job Aids	<b>Job Aids, Infographics, and Videos</b> will provide “on the job support”
<b>Advantages</b>	<ol style="list-style-type: none"> <li>Short videos that can be viewed <b>anytime</b>.</li> <li>Ability to train <b>users in multiple locations</b> at the same time.</li> </ol>	<ol style="list-style-type: none"> <li>Flexibility and <b>Convenience</b>, allows learners to participate in training sessions from any location with an internet connection.</li> <li>Engages users to accelerate adoption.</li> </ol>	<ol style="list-style-type: none"> <li>Offers flexibility to the learners to <b>upskill at their own pace</b> and anytime, anywhere.</li> <li>Integrate different <b>elements</b>, such as an online platform, participant guides, videos etc. to increase engagement</li> <li>Offers the ability to complete the training <b>more than once</b>.</li> </ol>
<b>Considerations</b>	<ol style="list-style-type: none"> <li><b>Size of the stakeholder groups</b> and the number of trainings to complete.</li> <li><b>End user availability</b> to complete eLearning training particularly those who work shift patterns or do not have access to a PC</li> </ol>	<ol style="list-style-type: none"> <li><b>Technology requirements</b> such as laptop/computer availability, Wi-Fi connection, audio etc.</li> <li>Preparation required to ensure <b>virtual training is engaging</b>,</li> </ol>	<ol style="list-style-type: none"> <li><b>Technology requirements</b> such as laptop/computer availability, Wi-Fi connection, audio etc.</li> <li><b>Reliance on users</b> to independently complete self-study training.</li> </ol>



# FIN L100 Training Curriculum

## Level 100: Financials Navigation Overview

Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>Navigation</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>Navigate Core-CT through both Desktop and Mobile devices</li> </ul>	All Core-CT Users	10 Minutes	E-Learning Video

## Level 100: Strategic Sourcing

Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>Strategic Sourcing</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>Respond to 'request for' bid opportunities</li> <li>Send reminder notifications to suppliers and bidders for completing and submitting bids before the event end date</li> <li>Select and upload multiple attachments in the Sourcing Events Page</li> </ul>	Agency Strategic Sourcing - Project Administrator Agency Strategic Sourcing – Project Viewer Agency Strategic Sourcing – Event Administrator Agency Strategic Sourcing – Event Viewer Agency Strategic Sourcing – Event Collaborator Agency Strategic Sourcing – Planner Agency Strategic Sourcing – Plan Viewer	10 Minutes	E-Learning Video

# FIN L100 Training Curriculum – (cont.)

## Level 100: Approvals

Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>Approvals</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>• Approve Vouchers in Fluid</li> <li>• Approve Requisitions in Fluid</li> <li>• Approve Contracts in Fluid</li> <li>• Approve Purchase Orders in Fluid</li> </ul>	<p>Agency Accounts Payable Voucher Approver            Agency Alternate Approver            Agency ePro Requisition Amount Approver 1            Agency ePro Requisition Amount Approver 2            Agency ePro Requisition Amount Approver 3            Agency ePro Requisition Amount Approver 4            Agency ePro Budget Approver            Agency Purchasing Contract Approver            Agency Purchase Order Amount Approver 1            Agency Purchase Order Amount Approver 2            Agency Purchase Order Budget Approver            Agency Inventory MSR (Material Stock Requests) Approver</p>	<p>10 Minutes</p>	<p>E-Learning Video</p>



# FIN L100 Training Curriculum – (cont.)

## Level 100: eProcurement

Objectives	Audience	Duration	Delivery Method
<p>This course addresses the modifications to eProcurement within the upgraded system, focusing on the new Fluid User Interface (UI) Concepts that will be introduced.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>• Navigate eProcurement using its updated Fluid User Interface (UI)</li> <li>• Create and Manage Requisitions</li> <li>• Add/Update Receipts</li> </ul>	<p>Agency Cancel Requisitioner            Agency General Receiver            Agency Casual Receiver            Agency Catalog Viewer            Agency Requester            Agency Multi-Requester            Agency Requisition Closer            Agency TSR Requester            Agency Requisition Bid Contract Creator            Agency PSA/POS Requester            Agency PSA/POS Submitter            Agency Requisition Purchase Approver            Agency Service Approver            Agency Requisition Amount Approver 1            Agency Requisition Amount Approver 2            Agency Requisition Amount Approver 3            Agency Requisition Amount Approver 4            Agency Requisition Amount Approver 5            Agency ADHOC Approver            Agency Requisition Purchase Approver            Agency OPM Budget Approver 1            Agency OPM Budget Approver 2            Agency OPM Final Approver</p>	<p>10 Minutes</p>	<p>E-Learning Video</p>

# FIN L200 Training Curriculum – (cont.)

Registration Required

Level 200: Asset Management Approvals			
Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>Approvals</b> module introduced by the upgrade. This course will summarize the approval process for <b>Asset Management Approvers</b>.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>Approve asset management transactions</li> </ul>	Agency Asset Management Approver	1 Hour	Virtual Instructor-Led Training supported by: <ul style="list-style-type: none"> <li>Participant Guide</li> <li>Job Aids</li> </ul>

Level 200: Procurement (Requisitions and Receiving Goods & Services)			
Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>eProcurement</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>Quickly create requisitions for Catalog and Special request items</li> <li>View Create Requisitions component in Fluid</li> <li>Enter multiple Schedules for a Line, and multiple Comments and Attachments at the Header, Line and Schedule levels</li> <li>Use the Create Receipt tile to create new receipts</li> <li>Use the My Receipts tile to view and edit receipts and initiate supplier returns</li> <li>Manage the persistent cart on desktop and mobile devices</li> </ul>	Agency Cancel Requisitions Agency Delete Requisitions Agency Requisitions Amount Approver 1 Agency Requisitions Amount Approver 2 Agency Requisitions Amount Approver 3 Agency Requisitions Amount Approver 4 Agency Requisition Budget Approver Agency Requisition Closer Agency Catalog Viewer Agency Item Processor Viewer	~2 Hours	Virtual Instructor-Led Training supported by: <ul style="list-style-type: none"> <li>Participant Guide</li> <li>Job Aids</li> </ul>



# HR L100 Training Curriculum

## Level 100: Navigation Overview

Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>Navigation</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>Navigate Core-CT through both Desktop and Mobile devices</li> </ul>	All Core-CT Users	10 Minutes	E-Learning Video

## Level 100: eProfile Self-Service

Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>eProfile</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>View and change their personal information online in Fluid</li> </ul>	All Core-CT Users	10 Minutes	E-Learning Video

# HR L100 Training Curriculum - (cont.)

## Level 100: Life Events Self-Service

Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>Life Events</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>View their benefit information in Fluid</li> <li>Manage life events that effect their benefits and coverage in Fluid</li> </ul>	All Core-CT Users	~10 Minutes	E-Learning Video

## Level 100: Open Enrollment Self-Service

Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>Open Enrollment</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>Enroll in the benefits program during open enrollment periods</li> </ul>	All Core-CT Users	~10 Minutes	E-Learning Video

# HR L100 Training Curriculum - (cont.)

## Level 100: Time and Labor Self-Service

Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>Time and Labor</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>• Enter and submit time on both desktop and mobile devices in Fluid</li> </ul>	Agency TL – Time Reporter	~10 Minutes	E-Learning Video

## Level 100: ePay Self-Service

Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>ePay</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>• View and print their paychecks in Fluid</li> <li>• Access paycheck data details in Fluid</li> <li>• Request or withdraw consent to receive paper W-2, W-2c, and tax withholding forms in Fluid</li> </ul>	All Core-CT Users	~10 Minutes	E-Learning Video

# HR L100 Training Curriculum - (cont.)

Level 100: Delegations			
Objectives	Audience	Duration	Delivery Method
<p>This course covers the new functionality of <b>Delegations</b> introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>• Delegate certain transactions to other employees</li> <li>• View, accept, deny transactions delegated to them</li> <li>• Revoke any active delegation requests</li> </ul>	Agency HR – Position Approver Agency HR – eProfile Approver Agency Benefits – Approver Agency TL – Approver	~10 Minutes	E-Learning Video
Level 100: Approvals			
Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>Approvals</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>• Approve agency level e-profile changes to authorize self-service name and address changes in Fluid</li> <li>• Use the AWE (Approval Workflow Engine)</li> <li>• View all pending approvals in one centralized location</li> <li>• View and clear exceptions</li> </ul>	Agency HR – Position Approver Agency HR – eProfile Approver Agency Benefits – Approver Agency TL – Approver	~10 Minutes	E-Learning Video

# HR L200 Training Curriculum - (cont.)

Registration Required

Level 200: Managing Job			
Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>Managing Job</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>• Administer HR processes to maintain employee jobs, status, and data</li> <li>• Hire and Rehire an Employee</li> <li>• Dual Employment Processing</li> <li>• Maintain Employee Job Information/Data                             <ul style="list-style-type: none"> <li>○ Salary Increases</li> <li>○ Transferring an Employee</li> <li>○ Supervisor Changes</li> </ul> </li> </ul>	HR Specialist Statewide Viewer Agency Viewer	~2 Hours	Virtual Instructor- Led Training supported by: <ul style="list-style-type: none"> <li>• Participant Guide</li> <li>• Job Aids</li> </ul>

Level 200: Position Management			
Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>Position Management</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>• Access position management Fluid pages and dashboards</li> <li>• Manage positions for both new and existing positions</li> <li>• Clone positions and rows</li> <li>• Review transactions status</li> </ul>	HR Specialist Statewide Viewer Agency Viewer	~2 Hours	Virtual Instructor- Led Training supported by: <ul style="list-style-type: none"> <li>• Participant Guide</li> <li>• Job Aids</li> </ul>

# HR L200 Training Curriculum – (cont.)

Registration Required

Level 200: Position Approval			
Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>Position Approval</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>• Understand the approval process for positions</li> <li>• Approve and/or deny position approvals</li> </ul>	<p>Position Specialist                      Agency Personnel Administrator                      Agency Budget Specialist                      DAS Analyst                      OPM Analyst                      OPM Senior Analyst                      OPM Section Director                      OPM Budget Director</p>	~1 Hour	<p>Virtual Instructor- Led Training supported by:</p> <ul style="list-style-type: none"> <li>• Participant Guide</li> <li>• Job Aids</li> </ul>

Level 200: Personal Data			
Objectives	Audience	Duration	Delivery Method
<p>This course covers the changes to the <b>Personal Data</b> module introduced by the upgrade.</p> <p>Upon completing this course, participants will be able to:</p> <ul style="list-style-type: none"> <li>• Access Fluid Tiles related to Modify Person, Create Employee, Create Person of Interest, and Organizational Relationship</li> <li>• Administer Processes to Update Employee Personal Data</li> <li>• Create Organizational Relationships</li> </ul>	<p>HR Specialist                      Pension Administrator                      Agency Viewer</p>	~ 2 Hours	<p>Virtual Instructor- Led Training supported by:</p> <ul style="list-style-type: none"> <li>• Participant Guide</li> <li>• Job Aids</li> </ul>



# Transaction Freeze Dates

The following transactions will need to be complete and approved prior to Go-Live:

- Position
- Name
- Address
- Combo Codes
- Security Changes



More information coming soon!

# Role Handbook Updates Coming

HRMS ROLE ASSESSMENT HANDBOOK	
Last Updated July, 2017	
Core-CT	
INTRODUCTION .....	5
ROLE DESCRIPTIONS .....	5
Assigning Roles .....	5
<b>Benefits - Agency Users .....</b>	<b>6</b>
Agency Benefits - Specialist .....	6
Agency Benefits - Specialist (Benefits Billing) .....	6
Agency Benefits - Viewer .....	7
Agency Benefits - Benefits Billing Viewer .....	7
<b>Benefits - Central Users .....</b>	<b>8</b>
Central Benefits - Administrator .....	8
Central Benefits - Clerical Specialist .....	9
Central Benefits - Query Generator .....	9
Central Benefits - Report Generator .....	9
Central Benefits - Report Viewer .....	9
Central Benefits - Viewer .....	9
<b>Human Resources - Agency Users .....</b>	<b>10</b>
Agency HR - Budget Specialist, Position Approver .....	10
Agency HR - EProfile Approver .....	10
Agency HR - Job Code Viewer .....	10
Agency HR - Personnel Administrator, Position Approver .....	10
Agency HR - Positions Specialist .....	11
Agency HR - Configuration Positions Specialist Judicial .....	11
Agency HR - Positions Viewer .....	11
Agency HR - Regulatory Requirements Specialist .....	11
Agency HR - Regulatory Requirements Viewer .....	12
Agency HR - Report Generator .....	12
Agency HR - Specialist .....	12
Agency HR - Statewide Viewer .....	13
Agency HR - Viewer .....	13
Agency HR - Workers' Compensation Specialist .....	13
Agency HR - Workers' Compensation Viewer .....	13
<b>Human Resources - Central Users .....</b>	<b>14</b>
Central HR - Classification Specialist .....	14
Central HR - Classification Viewer .....	14
Central HR - Configuration Maintainer .....	14
Central HR - Position Approver .....	15
Central HR - Positions Viewer .....	15
Central HR - Query Generator .....	15
Central HR - Regulatory Requirements Specialist .....	15
Central HR - Report Generator .....	15
Central HR - Report Viewer .....	16
Central HR - Salary Specialist .....	16
Central HR - Specialist .....	16
Central HR - Viewer .....	16

- **Change Agent Action**

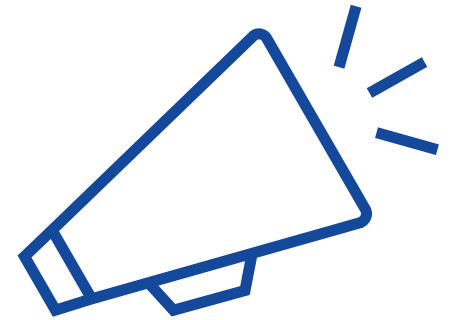
- Inform Security Liaisons that role changes are coming
  - Existing communication vehicles will be used
  - CO-1092 is the security form to request access
  - OSC will be working with agencies to assign new roles (i.e.: Asset Management Approvers)

# Change Agent Responsibilities

1. Amplify Training Registration for L200\*

2. Create and Distribute Agency-Specific Communications

3. Update Agency Readiness Checklist and Submit\*



Note: \*Communication Templates will be posted to the Modernization Page early September

# Go Live Readiness

- As Go-Live is approaching, the Core-CT Project will request each agency to assess their readiness
- Change Agents will be accountable for assessing their agency's readiness
- ***More details coming in September!***

Agency Name - <b>EXAMPLE</b>				
Task	Comms Distribution & Planning	Training Registration	Training Completion	Agency Readiness
Amplify Training Registration	X			
Create and distribute a Training Plan	X			
Agency users have registered for L200 Training		X		
Agency users have completed L200 Training			X	
Update Agency Readiness Checklist				X

Legend
<b>Green:</b> >85%
<b>Yellow:</b> 50-85%
<b>Red:</b> <50%

# Training & Modernization Page

The Core-CT Modernization page will be updated to display materials that change agents can use for reference about system upgrades and modernization efforts.

Change Agent Meeting Recordings will be posted here.

[Core-CT Modernization Project \(state.ct.us\)](http://state.ct.us)



Meeting Date	Content
August 15, 2024	Slides (pdf) - <a href="#">UAT HCM Kickoff 2024</a> Recording (mp4) - <a href="#">UAT HRMS Kickoff 2024 Recording</a> Q&A (.xlsx) - <a href="#">UAT HCM Kickoff 2025 Q&amp;A</a>
August 13, 2024	Slides (pdf) - <a href="#">UAT Financials Kickoff 2024</a> Recording (mp4) - <a href="#">UAT Financials Kickoff 2024 Recording</a> Q&A (.xlsx) - <a href="#">UAT Financials Kickoff 2025 Q&amp;A</a>
July 9, 2024	Slides (pdf) - <a href="#">7/9 Change Agent Meeting Slides</a> Recording (mp4) - <a href="#">7/9 Change Agent Meeting recording</a> Q&A (.xlsx) - <a href="#">7/9 Change Agent Meeting Q&amp;A</a>
May 2, 2024	Slides (pdf) - <a href="#">5/2 Change Agent Meeting Slides</a> Recording (mp4) - <a href="#">5/2 Change Agent Meeting recording</a> Q&A (.xlsx) - <a href="#">5/2 Change Agent Meeting Q&amp;A</a>
February 1, 2024	Slides (pdf) - <a href="#">2/1 Change Agent Meeting Slides</a> Recording (mp4) - <a href="#">2/1 Change Agent Meeting recording</a> Q&A (.xlsx) - <a href="#">2/1 Change Agent Meeting Q&amp;A</a> Spreadsheet (xlsx) - <a href="#">MFA Sample Spreadsheet</a>
November 2, 2023	Slides (pdf) - <a href="#">11/2 Change Agent Meeting Slides</a> Recording (mp4) - <a href="#">11/2 Change Agent Meeting recording</a>

# Reminders

- Recommend everyone sign up for Daily Mails: [ListServ -- Core-CT Publications -- Subscribing \(state.ct.us\)](https://state.ct.us/ListServ/Core-CT/Publications)
- Share information with your agency (*i.e.: Freeze Dates, Training Registration, Role Handbook*)
- Add the Modernization & Training pages to your Favorites in your Browser
- Prepare to update internal training documentation after upgrade
- Plan to assess your agency's readiness



# Let's Take a Survey!

Please go to [www.menti.com](http://www.menti.com) and enter code in chat

- Have you been communicating these “PUM Upgrade” updates to your agency users?
- How do you feel about the training schedule we covered today?
- What feedback are you getting from your agency’s testers and your users?
- Do you have Core-CT agency users that need training and don’t have access to a PC?
- *Last but not least, who is going to the Big E?*



# Questions





# Glossary

- **Fluid:** a standard user interface that provides users with the ability to access PeopleSoft applications across a variety of ways from smartphones to tablets to desktops/laptops
- **Navigation Collection:** provides a list of shortcuts to access pages on the left side of the page
- **Tiles:** various applications displayed on the Fluid homepage that navigates user to the selected option
- **Homepage/Dashboard:** provides quick access to useful information by presenting tiles to the user

