

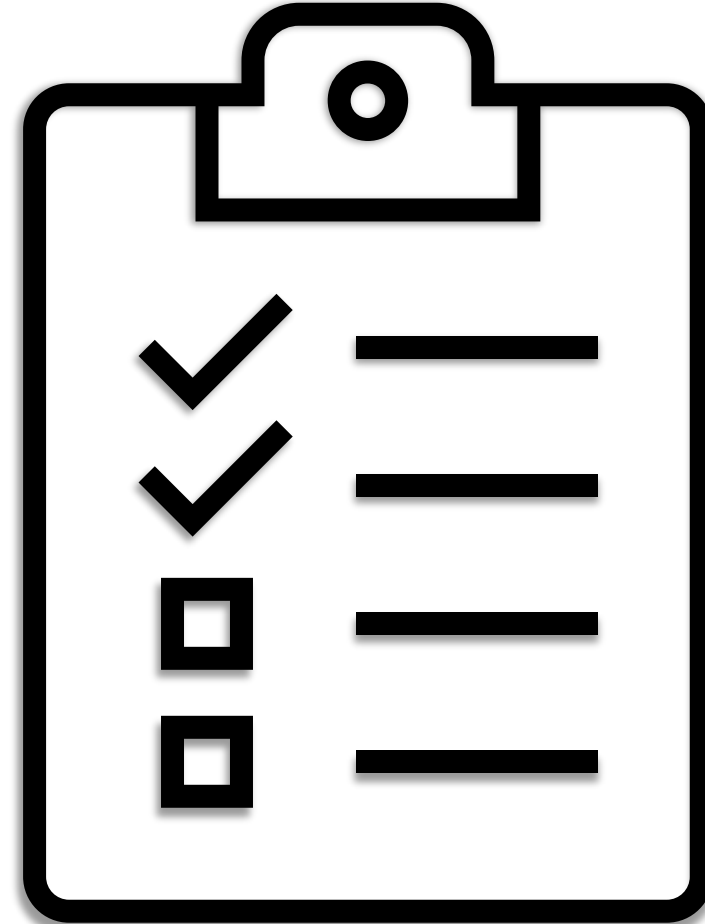


Core-CT Financials UAT Kickoff

August 13, 2024

Agenda

- Welcome
- Timeline
- UAT Logging In / Passwords
- Test Scenarios/Reporting Results
- Batch Schedule/System Availability
- Navigation
 - Approvals
 - Collections
 - Notifications / Approvals
 - Other Changes (SIT Tracker)
- Reporting Issues via FootPrints
- UAT Support
- Reminders / Questions



UAT Welcome

Welcome:

Thank you for volunteering to participate in our Financials Core-CT's User Acceptance Testing for the 2024 Fluid Upgrade! We appreciate your time and effort! When you log you will see a new look and feel, new fluid Homepages, Tiles, Approval Workflow and much more! This is why we are very pleased you have accepted this challenge to test the database at your own pace.

Thank
You

Change



UAT Start and End Dates



UAT Testing is set to begin on...
August 13, 2024
and be completed on
September 13, 2024

Logging In / Password Reset

You will be logging in with your user id and the password provided in the email along with the welcome spreadsheet. The password will need to be changed upon sign in.



Your Role / Purpose

Your Role/Purpose:

1. To test routine transactions and reports that occur in Core-CT modules. Specific transactions or scenarios are listed on the tab that corresponds to your Business Unit.
2. You will use your user id to log in to UAT, the first login will require a password reset.
3. Only test those types of transactions/reports that you use during your NORMAL COURSE OF BUSINESS in Core-CT.
4. To test routine queries and reports in EPM as well as reviewing the test transactions entered during this test.
5. The goal is to ensure that everything is functioning just as it does TODAY in the Live Production version of Core-CT.
6. To identify any issues log a footprints ticket. (Please see Kickoff Meeting Slide deck for specific instructions on how to log a UAT Help Ticket.)

<https://footprints.ct.gov/footprints>

7. Re-test scenarios on an as needed basis
8. Please complete your testing within a 10 business day period if possible.
9. FIN BATCH will run at 9am, 10am, 2pm & Overnight

* Note - All testing is done in the UAT test environment, the Orange Banner at top will identify this. Transactions done here will **NOT** impact business in the Live Core-CT environment.

UAT Scenarios PUM 2024

[UAT Business Unit Scenarios](#)

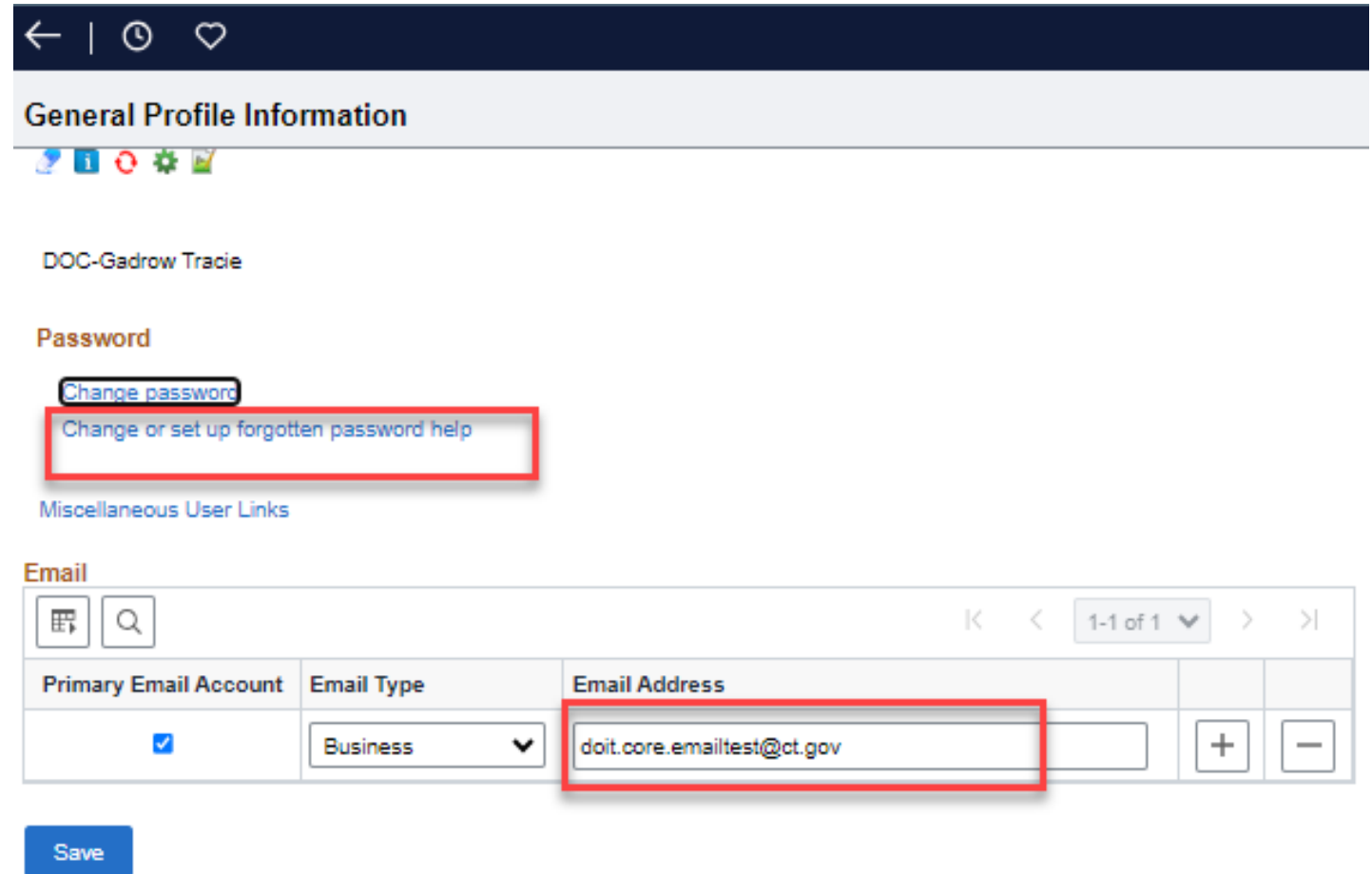
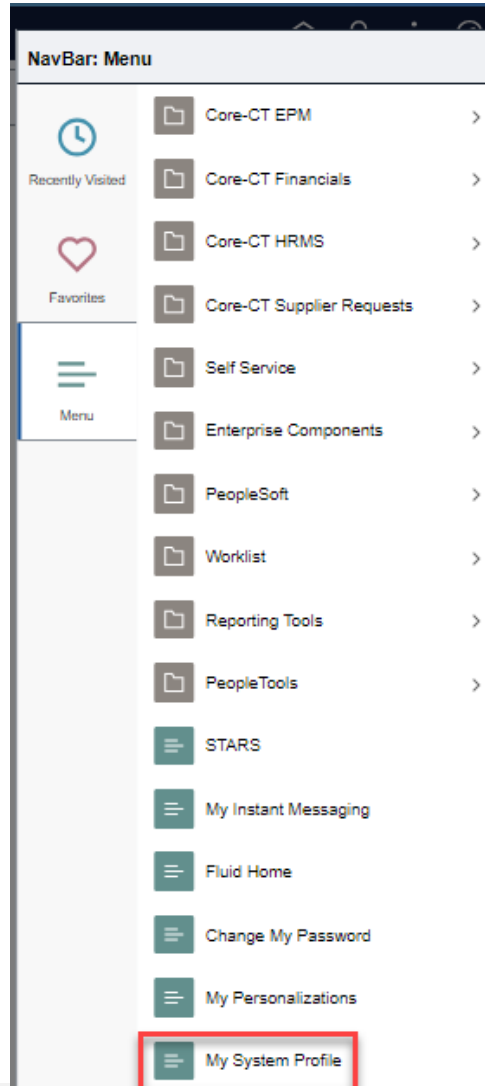
Testing Notes:

1. Please clear cache and use a different Browser application for accessing the test environment other than the one you use for Core-CT daily.
[Click here for instructions to Clear Browser Cache https://www.core-ct.state.ct.us/pdfs/Clr_Browser-Cache-23.docx](https://www.core-ct.state.ct.us/pdfs/Clr_Browser-Cache-23.docx)
2. Data in this environment is as of **07/19/2024**, so you will only see transactions through that date.
3. EPM will be refreshed each night, so you can log in the next day to run and test EPM reports.
4. STARS is not within scope for testing at this time.
5. Only 3 months of existing attachments will be accessible in this environment. However, you may attach new documents and retrieve them for testing.
6. Please **update your Business Email Address** using My System Profile on the Main Menu, in order to enable the Forgotten Password feature.

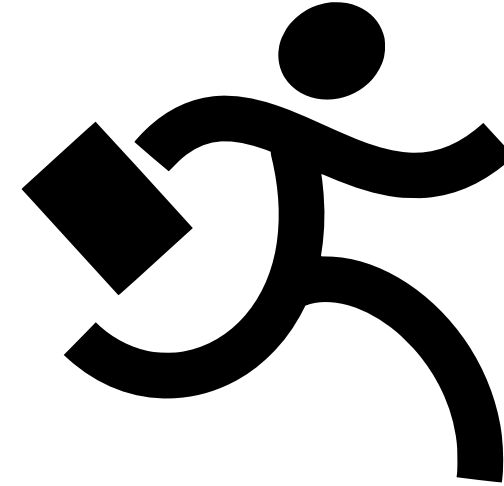
Email Address/Forgotten Password

- Navigate:
My System Profile
- Change or setup
your forgotten
password
- Change your email
address

**Note: you will be
getting notifications from
the test environment



Batch Schedule & System Availability



- **Batches will run on a schedule:**
 - 9 am, 10 am, noon, 2 pm
- **Environment Status:**
 - Financials – Available 7:00AM – 7:00PM
 - EPM – Available 7:00AM – 4:00PM
 - STARS – will not be available for testing at this time



Navigation – Home Page

Core-CT |

Menu

Employee Self Service

< 1 of 15 >

Time

Payroll

Last Pay Date **03/08/2024**

Personal Details

Action Required

Benefit Details

Leave Management

Pension

Open Enrollment

Starts now until 12/31/2024. You have already submitted your choices. You may re-elect. Your final enrollment must be submitted by 12/31/2024. To make a change, contact your Agency Benefits Specialist.

OPEB Start Date

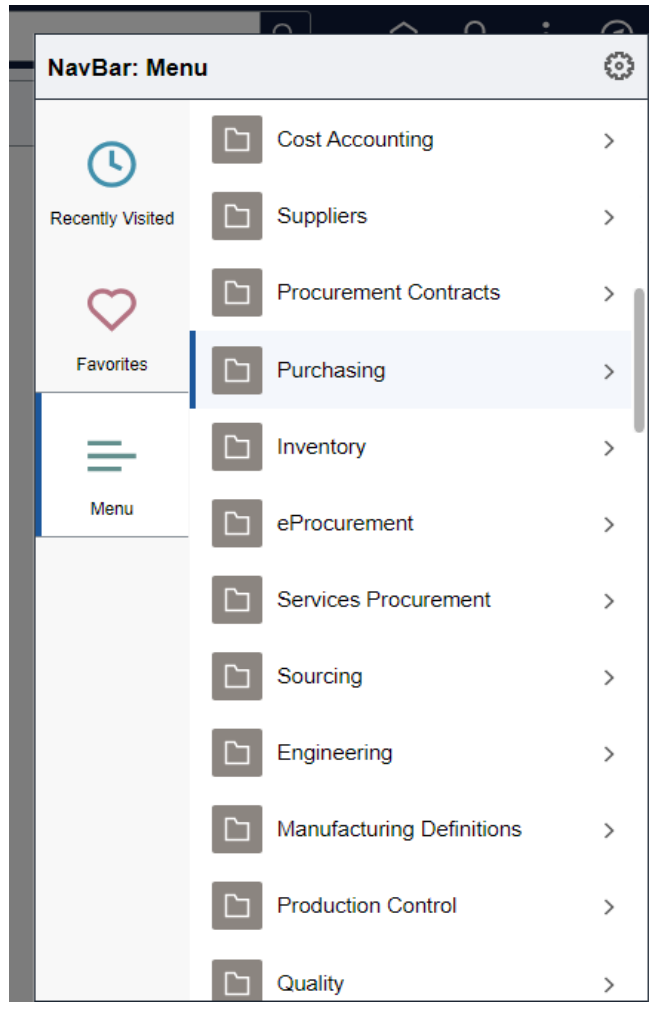
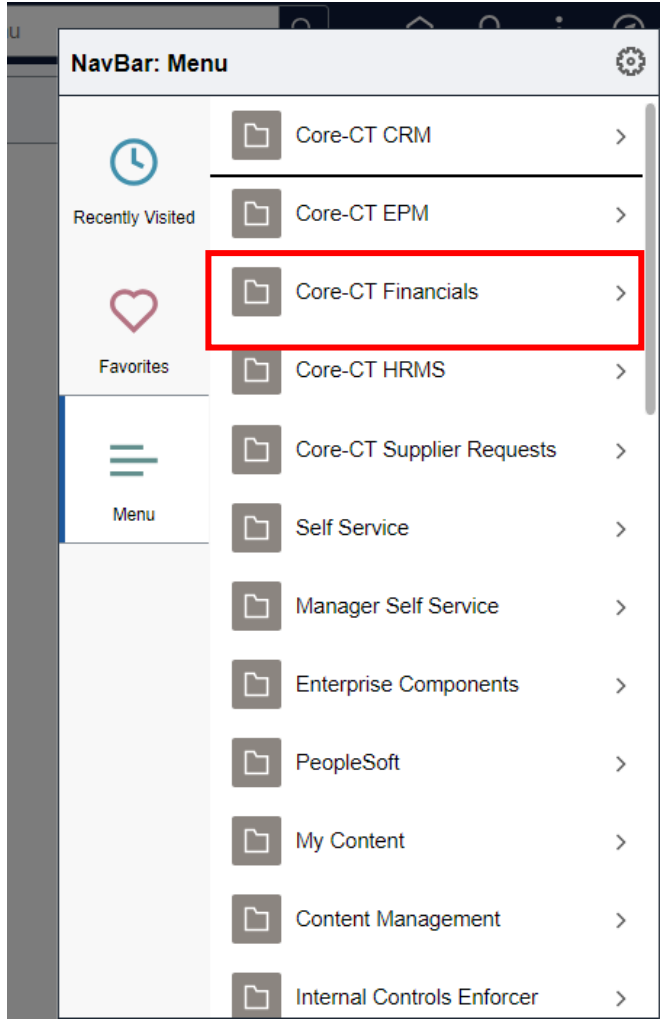
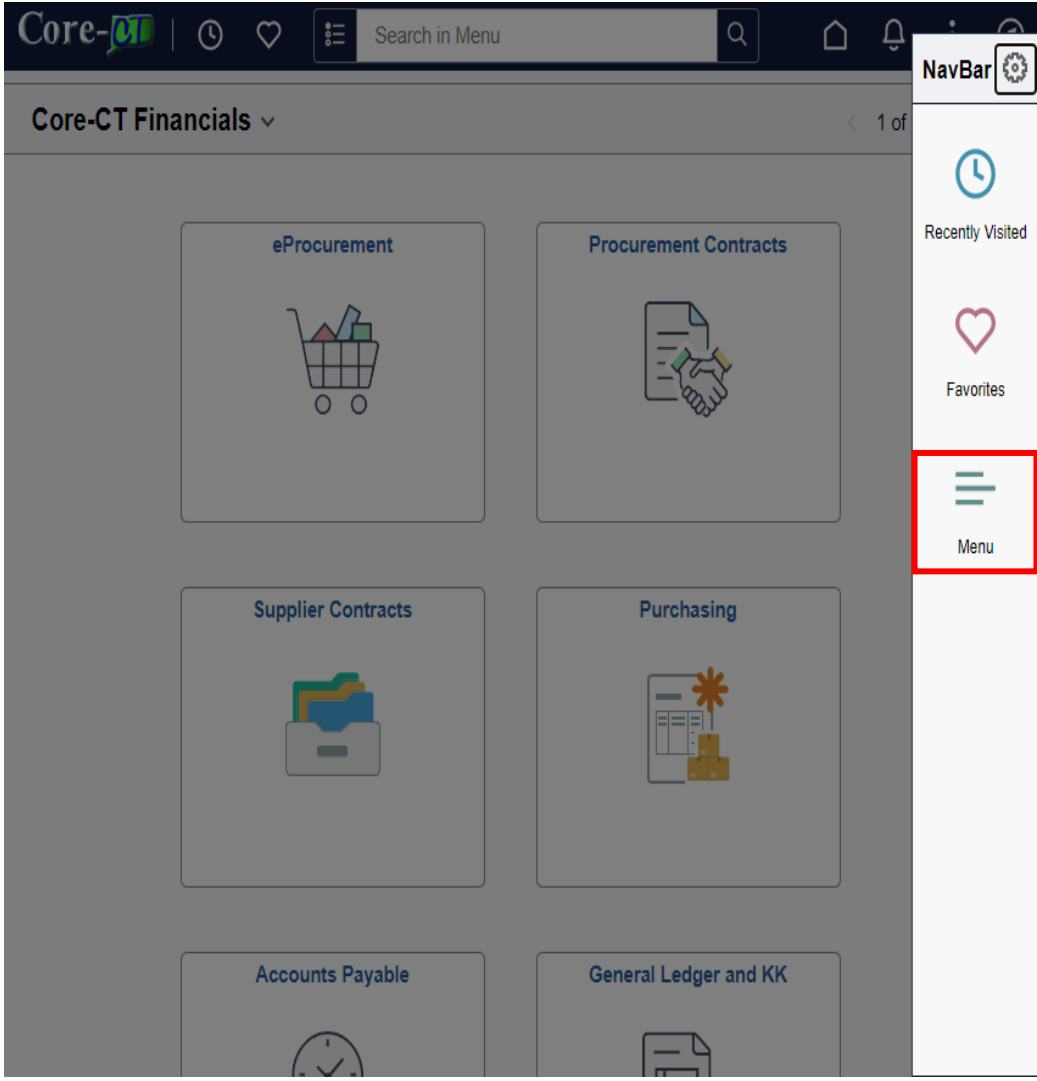
07/25/2013
Date of first retiree health contribution

Tiles

The screenshot shows the Core-CT Financials dashboard. The top navigation bar includes the Core-CT logo, a search bar with the text "Search in Menu", and navigation icons. Below the navigation bar, the "Core-CT Financials" menu is expanded, showing a grid of 14 tiles. The "Purchasing" tile, located in the second row, first column, is highlighted with a red border. The other tiles include eProcurement, Procurement Contracts, Supplier Contracts, Accounts Payable, General Ledger and KK, Accounts Receivable, Billing, Asset Management, Inventory, Customer Contracts, and Grants Management.

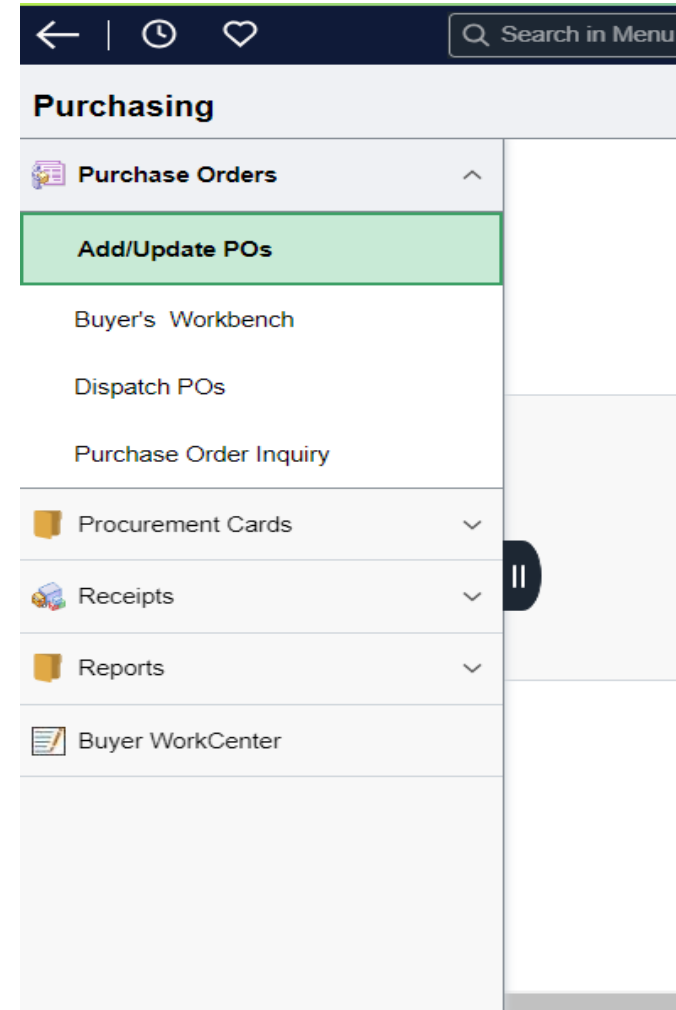
The screenshot shows the Core-CT Purchasing dashboard. The top navigation bar includes the Core-CT logo, a search bar with the text "Search in Menu", and navigation icons. Below the navigation bar, the "Purchasing" menu is expanded, showing a grid of 7 tiles. The "Purchasing" menu label is highlighted with a red border. The tiles include Approvals (with a count of 0), Buyer WorkCenter, Purchasing Nav Collection, Add/Update PO, Dispatch PO, Add/Update Receipts, and Reconcile PCard Statement.

Navigation - Menu



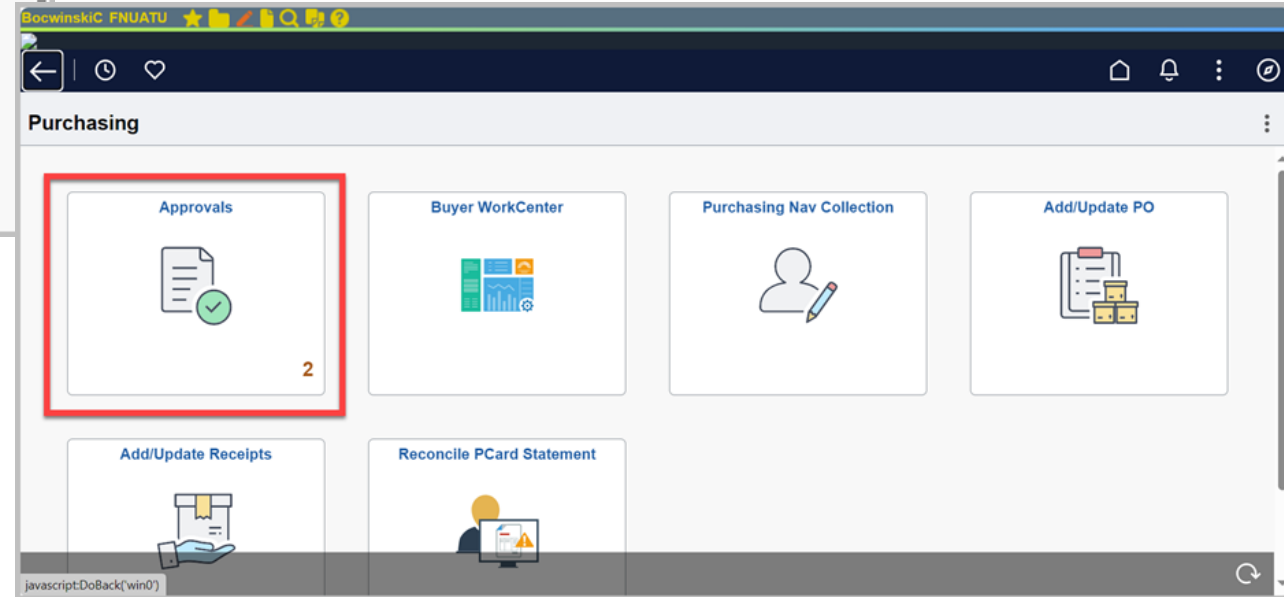
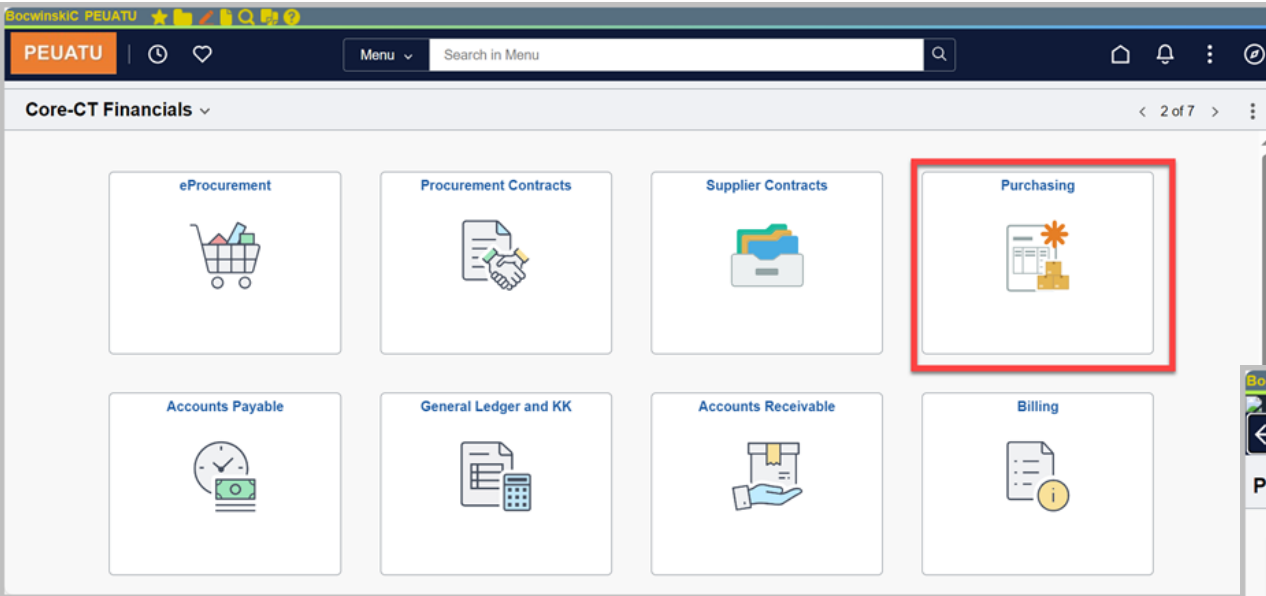
Collections

- 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.



Approvals – Fluid

- Approvals are now through the Fluid Approval Tile



Approvals – Fluid

The screenshot shows a web application interface for 'Pending Approvals'. On the left, there is a sidebar with a 'View By' dropdown set to 'Type'. Below it, there are two filterable categories: 'All' (with a count of 2) and 'Purchase Order' (with a count of 2). The main area displays a table of pending approvals. The first row is highlighted with a red border. The table has columns for item type and amount, a detailed description, vendor name, approval criteria, and status with date.

Item Type	Amount	Description	Vendor	Criteria	Status & Date
Purchase Order	10.00 USD	ECDM1 / 0000023494 / ECD-Flanagan Jessica R / UAT TESTING	SUBURBAN STATIONERS INC	PO Amt Approver Less than \$10K	Routed 08/08/2024
Purchase Order	1,344,344.00 USD	ECDM1 / 0000023476 / ECD-Flanagan Jessica R / FY25 STWM	ADAMS & KNIGHT INC	PO Amt Approver Less than \$10K	Routed 08/08/2024

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 screenshot shows a 'Pending Approvals' screen with a table of purchase orders. A 'Filters' dialog box is open, allowing users to narrow down the list. The dialog includes fields for Type, Requester, From, Date Period, Priority, Routed Date From, and Routed Date To. A red box highlights the 'All' filter button in the top left, and another red box highlights the 'Filter' button in the top right of the dialog. A red arrow points from a text box to the 'Filter' button.

The approver can use the filter to narrow down and find the PO they are looking for to approve, by selecting any of these fields.

Type	Requester	From	Date Period	Priority	Routed Date From	Routed Date To
Purchase Order	ECD-Flanagan Jessica R					
Purchase Order	ECD-Flanagan Jessica R					

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.

The screenshot shows a web browser window with multiple tabs. The active tab is titled '23494'. The browser's address bar contains 'Oracle Supp'. Below the browser, the 'Pending Approvals' page is displayed. On the left, there is a sidebar with 'View By' set to 'Type' and two options: 'All' (with a count of 2) and 'Purchase Order' (with a count of 2). The main content area shows a table of pending approvals. The first row is highlighted in orange, corresponding to the search criteria. The second row is separated by a dashed line.

Item Type	Item Number	Description	Vendor	Amount
Purchase Order	10.00 USD	ECDM1 / 0000023494 / ECD-Flanagan Jessica R / UAT TESTING	SUBURBAN STATIONERS INC	PO Amt Approver Less than \$10K
Purchase Order	1,344,344.00 USD	ECDM1 / 0000023476 / ECD-Flanagan Jessica R / FY25 STWM	ADAMS & KNIGHT INC	PO Amt Approver Less than \$10K

Approvals – Fluid

- Once a transaction is selected, you have 3 options...Approve, Deny, Pushback, Hold, Request Information
- Once the approve button is clicked you have the option to add Approver Comments you also have the option to add comments when

The screenshot shows a mobile application interface for requisition management. At the top, there is a navigation bar with a back arrow, a clock icon, and a heart icon. Below this, the page title is "Requisition". The main content area displays details for a requisition: "Request for Northern Tait Radios 5" with a value of "10,216.05 USD". A status indicator shows a pending approval. To the right of the details are three buttons: "Approve", "Deny", and "More".

Below the details is a "Summary" section with a table of key information:

Business Unit	DOCM1	Requisition ID	0000059535	Obligation Amount	10216.05
Routed Date	May 22, 2014	Requisition Date	May 22, 2014	Oblig Start	05/22/2014
Requester	DOC-DiBiasi Timothy J	Entered by	DOC-DiBiasi Timothy J	Oblig End	06/30/2014

Two modal windows are overlaid on the screen. The left modal is titled "Approve" and contains a "Cancel" button, a "Submit" button, and a text input field for "Approver Comments". The right modal is titled "Deny" and contains a "Cancel" button, a "Submit" button, and a text input field for "Approver Comments".

On the right side of the screen, a vertical menu is visible, containing buttons for "Approve", "Deny", and "More". Below these buttons are three larger buttons: "Pushback", "Hold", and "Request Information".

Notification Actions

Approvals can also be managed via the Notification Actions...

which can be accessed via the Notification Icon

The screenshot shows a web application interface with a dark blue header. In the top right corner, a notification bell icon is highlighted with a red square. Below the header, the main content area is titled 'Pending Approvals'. On the left, there is a sidebar with a 'View By' dropdown set to 'Type' and three filter options: 'All' (56), 'Purchase Order' (54), and 'Requisition' (2). The main table displays a list of pending approvals with columns for item type, amount, description, and vendor name.

All			
Purchase Order	2,000,000.00 USD	DOTM1 / 0000232723 / DOT-Fernandez Magdalena D / 12.22-01(20)	CLOSE JENSEN & MILLER PC
Purchase Order	196,000.00 USD	DOTM1 / 0000271980 / DOT-Daniel Abisola / TO Facilities Des 8.05-04(22)	STV INCORPORATED
Purchase Order	1,648,800.00 USD	DOTM1 / 0000267491 / DOT-Blanks Courtney L / 3.08-12(23) MMAC	TOWN OF SALISBURY
Purchase Order	31,880.86 USD	DOTM1 / 0000159052 / DOT-Daniel Abisola / 7.23-01(14) T.O. claims	ARCADIS US INC
Requisition	760.00 USD	DOTM1 / 0000197742 / DOT-Capezzone Sean P / CommOE - CDW Jabra Headset	CDW GOVERNMENT LLC

The 'Notifications' panel is titled 'Notifications' and has two tabs: 'Actions' (selected) and 'Alerts'. It shows a list of 50 out of 569 actions. Each notification entry includes the name of the person whose timesheet is pending approval, the text 'Timesheet for [Name] is awaiting for your approval.', and the time of the notification.

- Timesheet for Richard Leso is awaiting for your approval. 14 May at 5:08 AM
- Timesheet for Christopher Reynolds is awaiting for your approval. 14 May at 5:08 AM
- Timesheet for Jamie Chen is awaiting for your approval. 14 May at 5:06 AM
- Timesheet for Benjamin Greenberg is awaiting for your approval. 14 May at 5:04 AM
- Timesheet for Nazana Weeks is awaiting for your approval. 14 May at 5:03 AM
- Timesheet for Stephen Smith is awaiting for your approval. 14 May at 5:03 AM
- Timesheet for Dhruvankumar Patel is awaiting for your approval. 14 May at 4:59 AM
- Timesheet for Sean Driscoll is awaiting for your approval. 14 May at 4:56 AM
- Timesheet for Robert Brisson is awaiting for your approval. 14 May at 4:56 AM

Notification Alerts

Approvals can also be managed via the Notification Alerts...

which can be accessed via the Notification Icon

For example: alert when approved

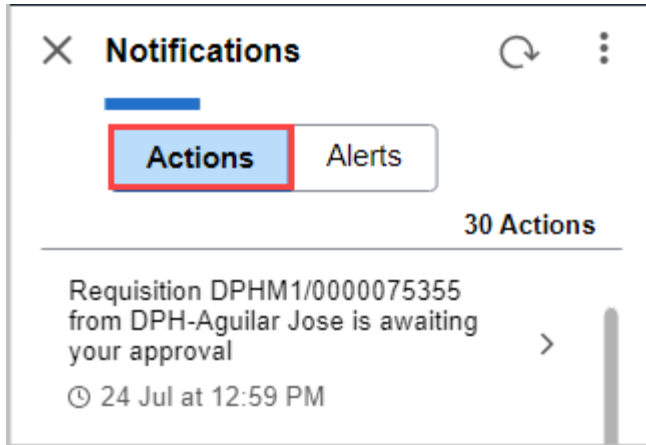
The screenshot shows a web application interface for 'Pending Approvals'. At the top right, a notification bell icon is highlighted with a red box. The main content area displays a list of approvals under the 'All' filter. The list includes five items: four Purchase Orders and one Requisition, each with its amount, details, and vendor name.

Type	Amount	Details	Vendor
Purchase Order	2,000,000.00 USD	DOTM1 / 0000232723 / DOT-Fernandez Magdalena D / 12.22-01(20)	CLOSE JENSEN & MILLER PC
Purchase Order	196,000.00 USD	DOTM1 / 0000271980 / DOT-Daniel Abisola / TO Facilities Des 8.05-04(22)	STV INCORPORATED
Purchase Order	1,648,800.00 USD	DOTM1 / 0000267491 / DOT-Blanks Courtney L / 3.08-12(23) MMAC	TOWN OF SALISBURY
Purchase Order	31,880.86 USD	DOTM1 / 0000159052 / DOT-Daniel Abisola / 7.23-01(14) T.O. claims	ARCADIS US INC
Requisition	760.00 USD	DOTM1 / 0000197742 / DOT-Capezzone Sean P / CommOE - CDW Jabra Headset	CDW GOVERNMENT LLC

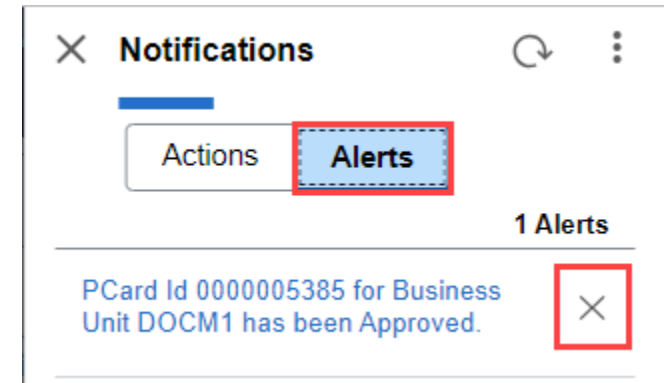
The 'Notifications' panel shows a 'No Alerts' message. Below the message is a refresh button with a circular arrow icon. A note states: 'When new notifications arrive, the Refresh button will show a badge'. The 'Alerts' tab is selected in the panel's header.

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.



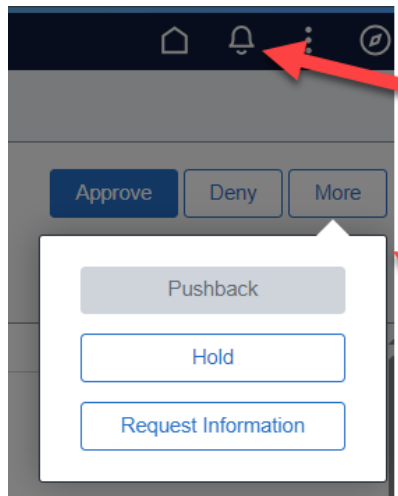


eProcurement



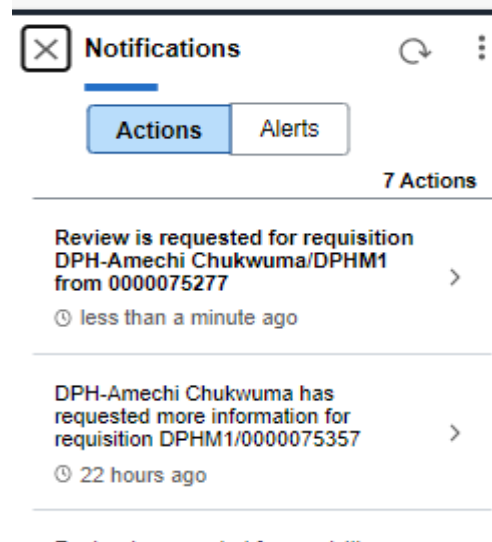
Other Changes - eProcurement

- **Request Information** is new in ePro. it will display along with *Pushback* and *Hold* when clicking the *More* approval options button.
- The Notifications Bell opens to two panels when clicked: Actions and Alerts.
- When the Approver selects the **Request for Information** button from the Approval Options, the Requester will receive an email and an **Action** Notification on the Notifications Bell.
- Selecting the **Hold** button will place the requisition on hold, which will remain on the approver's list, and the requester will receive an email and an **Action** notification on the Notifications Bell.

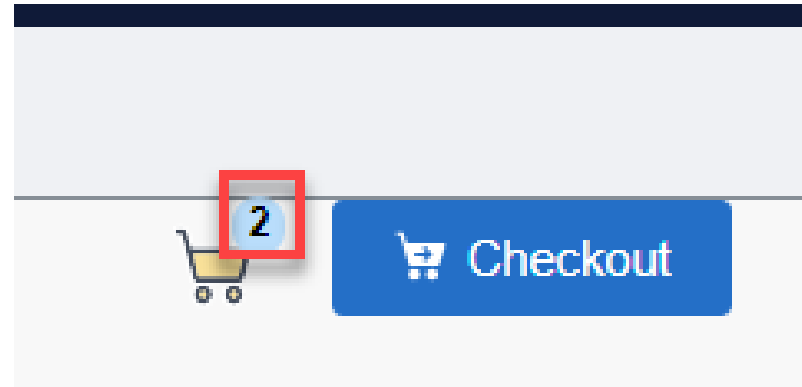


Notification
Bell

Approval
Options



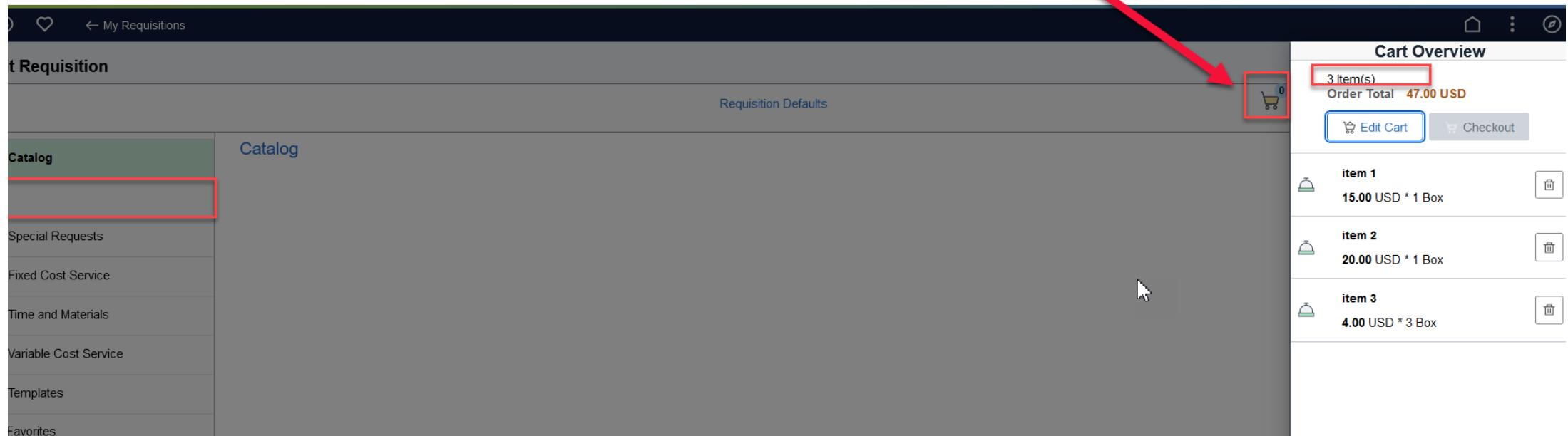
- Another new feature in ePro is the persistent cart. This enhancement allows the cart to keep items in it from a previous unfinished session (i.e. You have to switch priorities and don't have time to save or submit the requisition. The next time you access eProcurement> Create requisition, those items will still be available in the cart).



Other Changes – eProcurement

NOTE: The Web Suppliers link does not display if there are items already in the cart from a previous session. To correct:

Click the cart icon even if it shows zero (0) items. Click Checkout, and select the lines, then click Delete. To get back to Requisition, click Continue Shopping. The Web Suppliers link and logos will display.



The screenshot displays the 'My Requisitions' page. On the left, a sidebar menu includes 'Catalog', 'Special Requests', 'Fixed Cost Service', 'Time and Materials', 'Variable Cost Service', 'Templates', and 'Favorites'. The main content area shows 'Requisition Defaults'. A red arrow points to a shopping cart icon in the top right corner, which displays '0' items. A red box highlights this icon. To the right, a 'Cart Overview' panel is visible, showing '3 Item(s)' (highlighted with a red box), 'Order Total 47.00 USD', and buttons for 'Edit Cart' and 'Checkout'. Below this, three items are listed: 'item 1' (15.00 USD * 1 Box), 'item 2' (20.00 USD * 1 Box), and 'item 3' (4.00 USD * 3 Box). Each item has a trash icon to its right.

Other Changes – eProcurement

- Define Requisitions is now called Requisition Defaults

Requisition Defaults

Header Defaults

Business Unit: DOCM1
Requester: 000872
DOC-Kelsey, Timothy James
Priority: Medium
Currency: USD
Requisition Name:
Use Procurement Card: No
Card Number:
Expiration Date:
Requisition Type: Requisition
Obligation Amount:

Line Defaults

Supplier ID:
Supplier Location:
Buyer:
Category:
Unit of Measure:

Shipping Defaults

Ship To: 0490000013
Add One Time Address
Due Date:

Distribution Defaults

SpeedChart:

Distribution Line %	Percent %	Location %	GL Unit %	Account %
1	100	ACORE	STATE	



Other Changes – eProcurement

The *Override* radio button on Req defaults is replaced by the Mass Change action.

If changes are made on the Requisition Defaults page, those changes will apply to the lines when the Mass Change feature is applied to the selected lines by clicking the *Load Values from Defaults* button.

Edit Requisition

Requisition Summary

Business Unit: DPH-M1 Dept. of Public Health
Requisition Name: 0000075357
Requester: Aguilar J DPH-Aguilar Jose
Currency: USD

Priority: Medium
Requisition Type: Requisition
Dispatch Method: Print
Obligation Amount
Card Number
Expiration Date
Budget Check Status: Not Checked
Use Procurement Card: No

Justification Comments

Requisition Lines Overview

Line	Item	Status	Quantity	Unit of Measure	Price	Currency	Total
1	BUTANE FUEL REFILL CONTAINER FOR PEN SIZE SELF IGNITING JUMBO HEAT TOOL 5 1/8 OUNCES	Pending	1	EA	4.31	USD	4.31 USD

Actions

- Add to Favorites
- Add to Template(s)
- Delete
- Mass Change

Order Total: 4.31 USD

Mass Change

Line Information

Supplier ID: [Search]
Supplier Location: [Search]
Buyer: [Search]
Category: [Search]

Shipping Information

Ship To: [Search]
Due Date: [Calendar]
Attention: [Text]
Add One Time Address

Distribution Information

*Apply Distribution Changes: All Distribution Lines

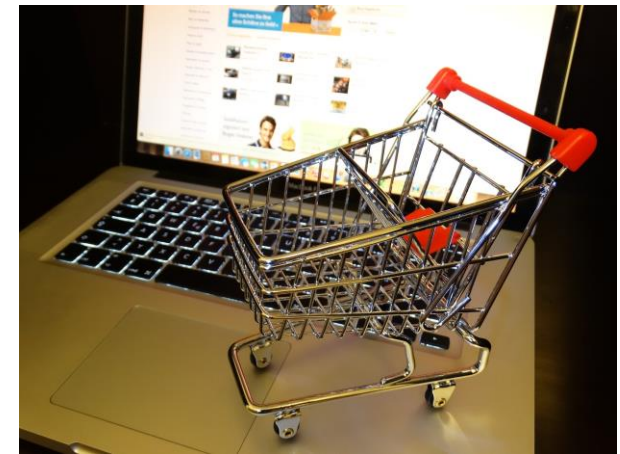
Please enter GL Business Unit before selecting other chartfield values

Chartfields1	Chartfields2	Chartfields3	Details	Asset Information	Show All
Distribution Line	Percent	Location	GL Unit	Account	
1	[Search]	[Search]	[Search]	[Search]	[+/-]

Load Values From Defaults



Purchasing



Other Changes – Purchasing

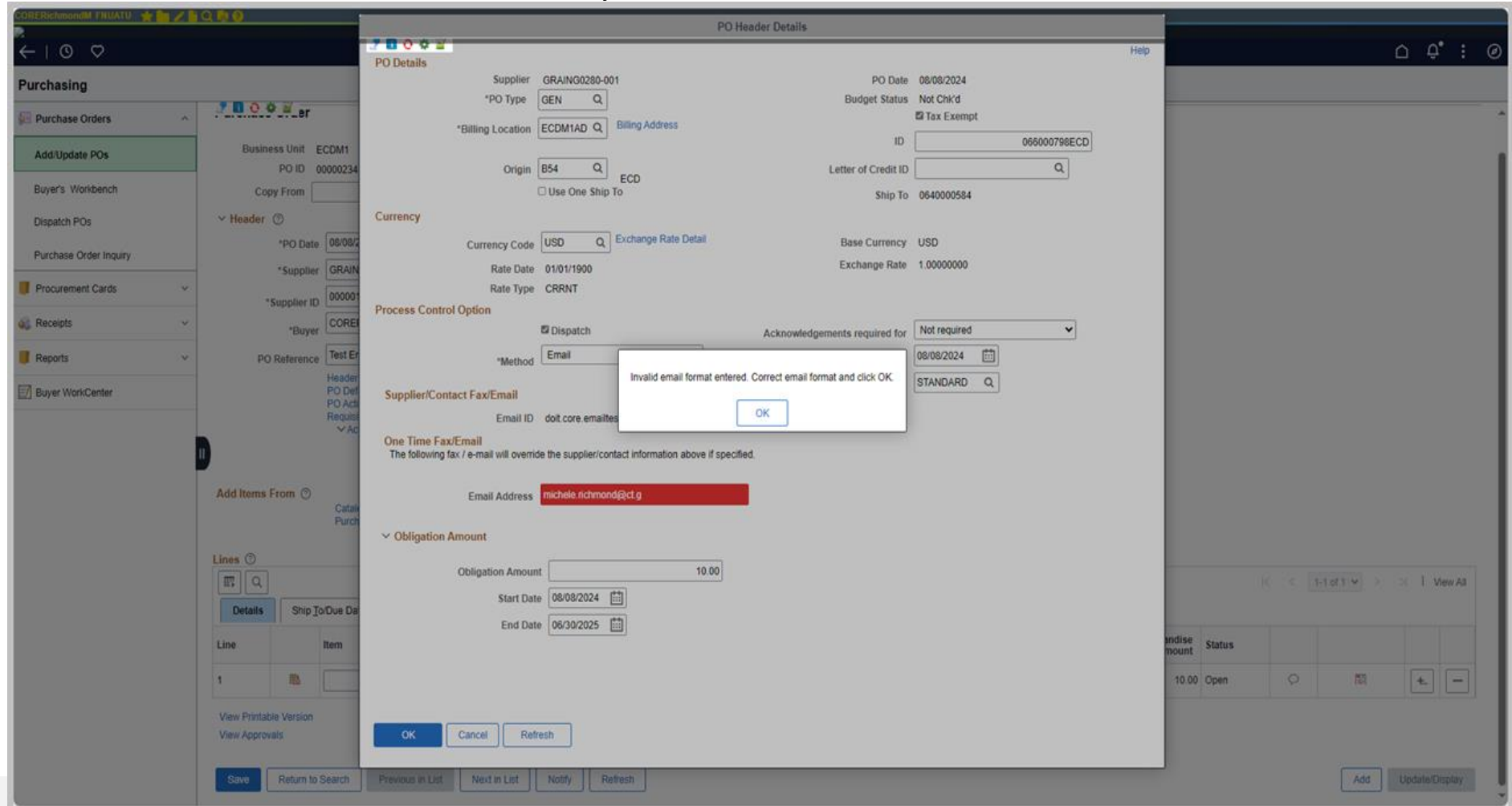
- Budget check is now on the PO Header
 - Users will now be able to go to the PO header and click the icon to budget check the purchase order. This feature will only be available to individual POs. Agencies **will not** have access to Budget check a batch of POs.

The screenshot displays the 'Add/Update POs' interface. The main section is titled 'Purchase Order' and shows details for Business Unit ECDM1 and PO ID 0000023494. The PO Status is 'Approved' and the Budget Status is 'Not Chk'd'. A red callout box with a red arrow points to a small icon next to the Budget Status, with the text 'Click on this icon to Budget check the Purchase Order'. The interface includes various input fields for PO Date (08/02/2024), Supplier (SUBURB3422-001), Supplier ID (0000010009), Buyer (164150), and PO Reference (UAT TESTING). It also features a 'Supplier Search' section and an 'Amount Summary' table.

Amount Summary	
Merchandise	10.00
Freight/Tax/Misc.	0.00
Total Amount	10.00 USD
Encumbrance Balance	

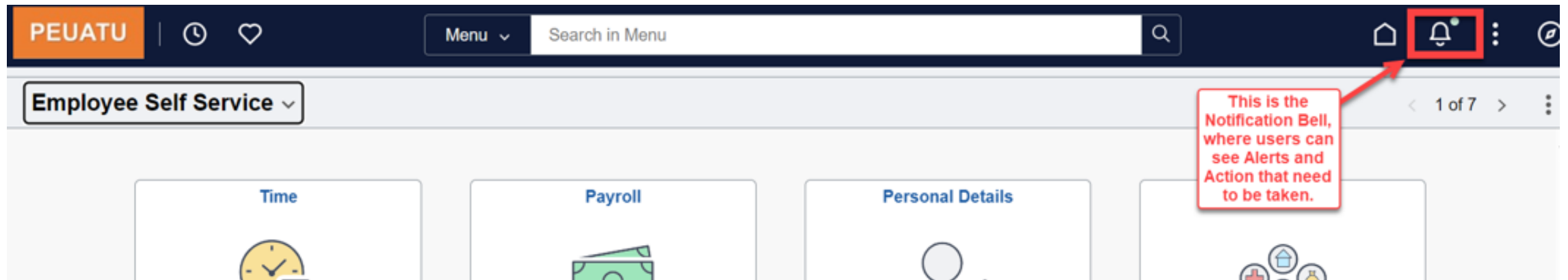
Other Changes – Purchasing

- Email Validation has been added to Purchase orders
 - When a PO is created and a onetime address is entered, the system will validate that the email address is in valid email format.



Other Changes – Purchasing

- Buyers workflow will **NOT** use Fluid Approvals, instead the Notification Bell will be used
 - The notification bell is used for Alerts and Actions for the user



Other Changes – Purchasing

- The buyer will receive an ACTION notification if the Approver is requesting more information, or if the PO is put on HOLD
- The buyer will receive an ALERT notification when the PO is approved or denied.

The screenshot displays the PEUATU Employee Self Service interface. The main content area includes sections for Time, Payroll (Last Pay Date: 07/26/2024), Personal Details, Pension, Open Enrollment, and OPEB Start Date. A Notifications panel is open on the right, showing two notification types: Action and Alerts. A red box with a red arrow points to the 'Actions' tab, containing the text: "The buyer will receive an Action notification if the Approver is requesting more information, or if the PO is put on HOLD". A green box with a green arrow points to the 'Alerts' tab, containing the text: "The buyer will receive an Alert when the PO is Approved or denied." The Notifications panel shows two notifications: one from ECD-Bocwinski Cheryl A regarding a Purchase Order (000023494) and another regarding a Purchase Order (000023476) routed for review.

Other Changes – Purchasing

- The approval page on a Purchase Order will no longer show previous approver comments or if the PO is on HOLD. The approver will be required to click on Approval Chain to see comments and status of the pending PO.

Purchase Order
ADAMS & KNIGHT INC
1,344,344.00 USD

Header is pending your approval

Summary

Supplier	ADAMS & KNIGHT INC	PO Total	1,344,344.00 USD
PO Reference	FY25 STWM	Status	Pend Appr
PO ID	000023476	Business Unit	ECDM1
PO Date	07/17/24	Routed Date	07/31/24
Buyer	ECD-Flanagan Jessica R	Budget Status	Valid

[Edit Purchase Order](#)

More Information

[View Printable Version](#)

Lines

Line Number	Item Description	Merchandise Amount
1	4321200- Creative Development	385,000.00 USD
2	4321800-Out of state PR Fees/Retainer	411,276.00 USD
3	4320700-PR Special Projects	40,000.00 USD
4	4320500-In-State PR Fees/Retainer for Tourism	130,908.00 USD
5	4321602-Web Development - Content Mgt & Dev	90,000.00 USD
6	4321605-Web Development - Design & Dev	93,000.00 USD
7	4321603-Web Development- Maintenance	102,260.00 USD
8	4320200- Research	68,900.00 USD
9	4830000-Subscriptions	23,000.00 USD

Approver Comments

[Approval Chain](#)

Other Changes – Purchasing

Approval Comments

Purchase Order
ADAMS & KNIGHT INC
1,344,344.00 USD
Header is pending your approval
Buyer: ECD-Flanagan Jessica R

More Information
View Printable Version >

Lines

Line Number	Item Description
1	4321200- Creative Development
2	4321800-Out of state PR Fees/Retainer
3	4320700-PR Special Projects
4	4320500-In-State PR Fees/Retainer for Tourism
5	4321602-Web Development - Content Mgt & Dev
6	4321605-Web Development - Design & Dev
7	4321603-Web Development- Maintenance
8	4320200- Research
9	4830000-Subscriptions

Approver Comments

Approval Chain >

Approval Chain

PO AMOUNT APPROVER
Purchase Order 0000023476 Pending
Start New Path

PO AMOUNT APPROVER
On Hold +

Multiple Approvers
PO Amt Approver Less Than \$10K
08/08/24 3:03 PM >

Not Routed +

Multiple Approvers
PO Amt Apprvr Great Than \$10K >

Comments

ECD-Bocwinski Cheryl A at 08/08/24 - 3:03 PM
Holding to wait for budget

> Comment History

OSC Amount Approver
Purchase Order 0000023476 Awaiting Further Approvals
Start New Path

OSC Amount Approver
Not Routed +

Multiple Approvers
PO Amt Approver More Than \$1M >

> Comment History

PO Chartfield Approver
Purchase Order 0000023476 Awaiting Further Approvals
Start New Path



Procurement Contracts



Other Changes – Procurement Contracts

PO Default & OPM Reporting link have moved to another location on the Procurement Contract

Contract Entry Contract

SetID STATE

Contract ID TOWN OF OXFORD

*Status **Open**

Contract Version
Version 1 Status Current

Approval Due Date

Administrator/Buyer

State Identified Contract Type **Grant**

Header

*Contract Style **Purchase Order**

Process Option **Purchase Order**

*Supplier **OXFORDT108-001** [Supplier Search](#)

*Supplier ID **000000108** **OXFORD TOWN TREASURER**

Primary Contact

Supplier Contract Ref

Description **11.18-30(18)**

Master Contract ID

*Begin Date **01/01/2017**

Expire Date **12/31/2023**

Renewal Date

Control Type **Business Unit**

Tax Exempt Tax Exempt ID

[Add a Document](#)

- [Add Comments](#)
- [Contract Activities](#)
- [Primary Contact Info](#)
- [Contract Header Agreement](#)
- [Contract Releases](#)
- [Custom Fields](#)
- [Activity Log](#)
- [Document Status](#)
- [Thresholds & Notifications](#)
- [Price Adjustment Template](#)
- [PO Defaults](#)
- [Add Open Item Price Adjustments](#)
- [OPM Reporting](#)

Currency **USD** **CRRT**

Other Changes – Procurement Contracts

PEUATU

Search in Menu

Add/Update Contracts

*Begin Date: 08/09/2024
Expire Date: 08/09/2025
Renewal Date:
Control Type:
 Tax Exempt Tax Exempt ID:
Currency: USD CRRNT
Add Open Item Price Adjustments
OPM Reporting

Amount Summary
Maximum Amount: 0.00 USD
Line Item Released Amount
Category Released Amount
Open Item Released Amount
Non-PO PCard Transactions
Total Released Amount

Order Contract Options
 Allow Multicurrency PO
 Corporate Contract
 Lock Chartfields
 Allow Open Item Reference
 Adjust Supplier Pricing First
 Price Can Be Changed on Order
 Must Use Contract Rate Date Rate Date: 08/09/2024
 Auto Default

Contract Items
Catalog Search Item Search Search for Contract Lines

Corporate Contract should only be selected if you are DAS creating a Statewide Contract. If this is not a State wide contract this should be unchecked

Other Changes – Procurement Contracts

- Always Remember: Corporate Contract check box should always be unchecked when creating a contract for your agency

The screenshot shows the 'Add/Update Contracts' interface in the PEUATU system. The 'Business Unit' section contains a table with one row:

*Business Unit	Description		
1		+	-

The 'Amount Summary' section shows the following values:

- Maximum Amount: 0.00 USD
- Line Item Released Amount: 0.00
- Category Released Amount: 0.00
- Open Item Released Amount: 0.00
- Non-PO PCard Transactions: 0.00
- Total Released Amount: 0.00

The 'Order Contract Options' section includes several checkboxes:

- Allow Multicurrency PO
- Corporate Contract (highlighted with a red arrow)
- Lock Chartfields
- Allow Open Item Reference
- Adjust Supplier Pricing First
- Price Can Be Changed on Order
- Must Use Contract Rate Date
- Auto Default

The 'Rate Date' is set to 08/09/2024.

Other Changes – Procurement Contracts

The screenshot shows the 'Add/Update Contracts' page in a procurement system. The main form includes fields for Supplier ID (0000010008), Supplier Name (GRAINGER INDUSTRIAL SUPPLY), Primary Contact, Supplier Contract Ref, Description (Testing new BU Section), Master Contract ID, Begin Date (08/09/2024), Expire Date (08/09/2025), Renewal Date, Control Type (Business Unit), and Tax Exempt status. A 'Business Unit' field is highlighted with a red box and contains 'ECDM1'. A red arrow points from this field to a 'Contract Defaults by BU' dialog box. In the dialog box, the 'Business Unit' field is also highlighted with a red box and contains 'ECDM1'. A red arrow points from the dialog box back to the 'Business Unit' field in the main form. A text box with red text explains: 'Both of these fields require the business unit to be entered. We are trying to get it to automatically default into the PO Defaults, but at this time it requires double entry.'

Procurement Card



Other Changes – Procurement Card

There has been a new field added to the Pcard reconcile statement search.

Business Unit

The screenshot shows the 'Reconcile PCard Statement' interface. At the top, there is a navigation bar with a search box labeled 'Search in Menu' and icons for home, notifications, and user profile. Below the navigation bar, the title 'Reconcile PCard Statement' is displayed, followed by utility icons and links for 'New Window', 'Help', and 'Personalize Page'. The main section is titled 'Reconcile Statement Search' and contains the following fields and controls:

- Role Name: A dropdown menu.
- Employee ID: A text input field with a search icon.
- Name: A text input field with a search icon.
- Business Unit: A text input field with a search icon, highlighted with a red box.
- Card Issuer: A dropdown menu showing 'JPMC Mastercard'.
- Card Number: A text input field.
- Transaction Number: A text input field.
- Merchant: A text input field.
- Sequence Number: A text input field.
- Line Number: A text input field.
- Billing Date: A date input field with a search icon, followed by 'To' and another date input field with a search icon.
- Statement Status: A dropdown menu.
- Budget Status: A dropdown menu.
- Chartfield Status: A dropdown menu.
- Transaction Date: A date input field with a calendar icon, followed by 'To' and a date input field with a calendar icon showing '07/18/2024'.
- Charge Type: A dropdown menu.
- Posted Date: A date input field with a calendar icon, followed by 'To' and a date input field with a calendar icon.
- Rows Per Page: A dropdown menu set to '50'.
- Auto Save When Scrolling Through Chunks: A checked checkbox.

At the bottom of the form, there are two buttons: 'Search' and 'Clear'.

Other Changes – Procurement Card

Here are a couple other changes to PCard

Navigation Name for the pages below have changed – highlighted is new

- Purchasing > Procurement Cards > Reconcile > Reconcile **PCard** Statement (used to be Reconcile Statement)
- Purchasing > Procurement Cards > Security > Assign Proxies to **PCard** (used to be Assign Proxies)
- Pcard workflow will not use Fluid Approvals, instead Notifications will be used





Asset Management



Other Changes – Asset Management

Asset Disposal Approvals

- New asset approving role **CT_F_A_ASSET_APPR** has been created; no current segregations of duties w/ role
- All Capital/Financial Asset retirements are now transacted on the **Disposal Worksheet** page
- Financial Asset Processors still use the Disposal Worksheet, however now the submitted assets get routed to agency Asset Approvers for review
- Asset Attachments and Comments can now be viewed on the Disposal Worksheet page

The screenshot displays the 'Disposal Worksheet' application. The left sidebar contains a navigation menu with 'Disposal Worksheet' selected. The main content area is divided into several sections: 'Disposal Worksheet' with search criteria (Unit: GOVM1, Book: GASB, Profile ID, From Asset ID, Tag Number, Location, From In-Service Date, To Asset ID, Serial ID, Area ID, To In-Service Date, Parent ID, FERC Code, Group ID, Asset Status: In Service, and an option for 'Include Non Capitalized Assets'); 'Acquisition Details' with a 'Retrieve Next' button and '100 Rows 1 - 29 Of 29'; 'Asset Action' with a 'Submit for Disposal' button, 'Disposal Code', 'Retire Date' (07/25/2024), 'Accounting Date' (07/25/2024), and fields for 'Adjust Retire Quantity By' and 'Adjust Retire Amount By'; and 'Search Results' with a table. The table has columns for 'Dispose', 'Asset ID', 'Description', 'Comments', and 'Attachments'. A red box highlights the 'Comments' and 'Attachments' columns for the first row, showing 'Comments (5)' and 'Attachments (0)'. The URL at the bottom of the browser window is 'javascript:submitAction_win0(document.win0,'AM_PANELS_WRK_ASSET_SEARCH');'.

Other Changes – Asset Management

- Users with the Asset Approver role will access their pending requests on the same **Approvals** Tile as all other requests

The screenshot shows a 'Pending Approvals' tile with a left-hand navigation menu and a main content area. The navigation menu has a 'View By' dropdown set to 'Type'. Two items are listed: 'All' (with a globe icon and a '2' badge) and 'Asset Disposal' (with a house and gear icon and a '2' badge). The main content area is titled 'All' and shows a list of two rows of 'Asset Disposal' requests. Each row includes the amount in USD, a date range, a redacted ID, and the status 'Routed' with the date '07/22/2024' and a chevron icon.

Type	Amount	Unit	Date Range	ID	Status	Date
Asset Disposal	2,469.25	USD	2024-07-22 / 2024-07-22-11.13.40.000000	[REDACTED]	Routed	07/22/2024
Asset Disposal	8,610.00	USD	2024-07-22 / 2024-07-22-11.25.00.000000	[REDACTED]	Routed	07/22/2024

Other Changes – Asset Management

Interface changes to Asset Management WorkCenter

- Review Interface Transactions link change: Now accessed through numbered hyperlink on right of each interface row
- New **Action** button location for Asset Processors to **Load into AM**
Note: Multi-line transactions of the same Interface ID no longer toggle together and must all be manually selected before using the Action button
- New link to **Process Monitor**

The screenshot displays the 'Asset Management WorkCenter' interface. On the left, a sidebar shows 'My Work' with 'Load Transactions into AM' highlighted (8 items). The main area shows a table of transactions with columns: AM Unit, System Source, Interface ID, Load Type, Load Description, and Review Pending Transactions. An 'Action' menu is open over the table, showing 'Load into AM'. A 'Process Monitor' link is visible in the top right. A red box 'a' highlights the 'Review Pending Transactions' column, and a red box 'b' highlights the 'Action' button.

AM Unit	System Source	Interface ID	Load Type	Load Description	Review Pending Transactions
<input checked="" type="checkbox"/>	OSCM1	AM Batch	10099818	IHI	Inventory History Insert
<input checked="" type="checkbox"/>	OSCM1	AM Batch	10099818	NAD	Non-Financial Add
<input checked="" type="checkbox"/>	OSCM1	AM Batch	10099818	PHY	Physical Asset Change
<input type="checkbox"/>	OSCM1	AM Batch	10099947	RET	Asset Retirement

Other Changes – Asset Management

Asset Management WorkCenter Menu changes

- New **Physical Inventory** section added for the Physical Inventory Processor to quickly access high-use pages
- The **Queries** and **Reports/Processes** menu sections are now found on the main menu page

Note: These three sections come collapsed when a user first visits the WorkCenter

The screenshot displays the 'Physical Inventory' section of a software interface. On the left is a navigation menu with the following items: 'My Work', 'Links', 'Manage Assets', 'Asset Review', 'Physical Inventory' (highlighted with a red box), 'Define Inventory Occurrence', 'Load/Match/Reconcile PI Info' (highlighted with a green box), 'Review Matching Results', 'Review Inventory History', 'Queries' (highlighted with a red box), and 'Reports/Processes' (highlighted with a red box). The main content area is titled 'Physical Inventory' and contains a search section 'Find an Existing Value'. Under 'Search Criteria', there is a text input field with the instruction 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Recent Searches' dropdown menu and a 'Saved Searches' icon. A search filter for 'Run Control ID' is set to 'begins with' with an empty text box. There are also options for 'Show fewer options' and 'Case Sensitive' (unchecked). At the bottom are 'Search' and 'Clear' buttons.

Other Changes – Asset Management

Users with the Asset Processor role can now access the **Consolidate** and **Unitize** pages from the WorkCenter

The screenshot displays the 'Load - Consolidate Assets' page. On the left, a navigation sidebar includes 'My Work', 'Links', 'Manage Assets', and 'Asset Review'. Under 'Manage Assets', 'Interface Transactions - Consolidate' is highlighted in green, and 'Interface Transactions - Unitize' is highlighted in red. The main content area is titled 'Load - Consolidate Assets' and features a 'Find an Existing Value' section with an '+ Add a New Value' button. Below this is a 'Search Criteria' section with instructions: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search criteria include 'Recent Searches' and 'Saved Searches' dropdowns, and input fields for 'Interface ID', 'Interface Line Number', and '*Business Unit'. The 'Asset Identification' field is partially visible at the bottom.



Accounts Payable



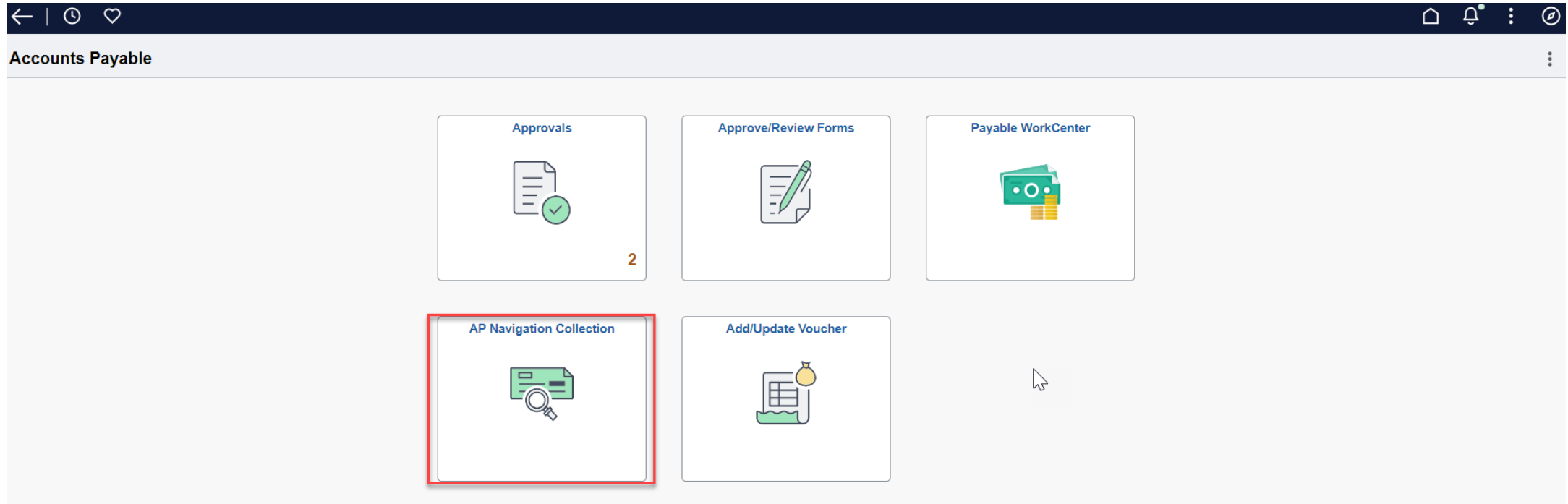
Other Changes – Accounts Payable

Navigation Collections are a new feature in this upgrade. To access the AP Navigation Collection navigate from the Financials menu drop down to the Accounts Payable Tile.

The screenshot displays the Core-CT Financials navigation interface. On the left, the 'Employee Self Service' dropdown menu is open, showing options: Employee Self Service, Core-CT Financials (highlighted with a red box), Core-CT HRMS, Core-CT Help, and Core-CT News. The main area shows the 'Core-CT Financials' dropdown menu expanded into a grid of tiles. The 'Accounts Payable' tile, located in the second row, first column, is highlighted with a red box. Other tiles include eProcurement, Procurement Contracts, Supplier Contracts, Purchasing, General Ledger and KK, Accounts Receivable, Billing, Asset Management, and Project Costing.

Other Changes – Accounts Payable

Once a user has drilled down to the AP tiles they will see the AP Navigation Collection Tile.



- Within the AP Navigation Collection Tile there are various high action items available on the left side of the screen. The Navigation Collection provides easy access to regularly used items within the AP module.

The screenshot displays the 'Accounts Payable' interface. On the left, a navigation menu is visible with the following items: 'My Suppliers', 'My Vouchers', 'Add/View Vouchers' (highlighted in green and enclosed in a red box), 'Matching Workbench', 'Voucher Build Error Detail', 'Document Tolerance Exceptions', 'My Reporting & Analysis', 'Review Accounts Payable', and 'Payables WorkCenter'. The main content area is titled 'Voucher' and 'Add a New Value'. It includes a search button labeled 'Find an Existing Value' and a form with the following fields: '*Business Unit' (dropdown menu showing 'STATE'), '*Voucher ID' (text input showing 'NEXT'), '*Voucher Style' (dropdown menu showing 'Regular Voucher'), 'Supplier Name' (text input with search icon), 'Short Supplier Name' (text input with search icon), 'Supplier ID' (text input with search icon), 'Supplier Location' (text input with search icon), 'Address Sequence Number' (text input showing '0' with search icon), 'Invoice Number' (text input), and 'Invoice Date' (calendar icon).

Other Changes – Accounts Payable

Many high action items are accessible in multiple ways either by the AP tiles, the AP Navigation Collection or the NavBar menu. The AP tiles and AP Navigation Collection do not contain all items in the NavBar menu for the module. One example of an item that is only accessible via the NavBar menu are the AP forms. Other modules have similar configurations where the high action items are available in the module tiles and module navigation collections.

The screenshot displays the PEUATU Core-CT Financials interface. The main area features a grid of navigation tiles for various modules: eProcurement, Procurement Contracts, Supplier Contracts, Purchasing, Accounts Payable, General Ledger and KK, Accounts Receivable, Billing, Asset Management, Inventory, Customer Contracts, Grants Management, and Project Costing. A sidebar menu titled 'NavBar: Menu' is open on the right, showing a breadcrumb trail: 'Menu > Core-CT Financials > Accounts Payable > Review Accounts Payable Info'. Below the breadcrumb, the sidebar lists several items under the heading 'Payments': Active Payroll Pmt Cxl - CO964, Payment Cancellation - CO790, Payment Information - CO860, Retiree Pyrl Pmt Cxl - CO965, Detail Data, Summary Data, Summary Metric, AP Bank Transfer Charge, AP Payments Document Status, Drafts, Federal Payment Schedule, AP - Letter of Credit, and Payment.



Billing



Other Changes – Billing

Copy Single Invoice – functionality that allows Users to create more than one copy of the bill.

Copy Single Bill

Unit	AESM1	Bill To	10	University of Vermont
Invoice	AES305	Invoice Amt	10,874.00	USD

Select Bill Action

No Bill Action
 Copy Bill

Number of Copies [Create Bills](#)

Copy Results

			1-1 of 1	
Sequence	*Copy Bill	Invoice Date		
1	<input type="text" value="NEXT"/>	<input type="text"/>		

[Save](#) [Return to Search](#) [Notify](#)



Accounts Receivable



Other Changes – Accounts Receivable

Customer Statements: Ability to Email Statements (if Customer Contact is configured for emailing)

Create Customer Statements

Statements Parameters

Currency to Convert

Run Control ID Create_Customer_Statements

Language English

Report Manager Process Monitor

Run

Report Request Parameters

As of Date 07/26/2024

Use System Date

Unit CMEM1

Chief Medical Examiner's Offc

SetID CMEM1

Chief Medical Examiner's Offc

Customer 10

Abriola & Kelemen Funeral Home

Correspondence Customer %

Statement Group All Statement Groups

Balance Forward Due Date 03/21/2013

Open Item

Open Item Include Drafts

Balance Forward

Balance Forward Re-run

Email Statement

Other Changes – Accounts Receivable

Ability to Email Dunning Letters (if Customer Contact is configured for emailing)

Dunning Letter

Dunning Letters Parameters | Display Currency

Run Control ID Extract_Dunning_Letter_Info
Language English

Report Manager Process Monitor **Run**

Report Request Parameters

As of Date 04/02/2024 Use System Date

SetID DEPM1 Dept of Energy & Environ Prot.

Unit DEPM1 Dept of Energy & Environ Prot.

Customer ID DAS001 Dept. of Admin Services

Correspondence Customer

Dunning Group All Groups

Use Severest Dunning Letter
 Use Modest Dunning Letter
 Email Dunning Letter

Other Changes – Accounts Receivable



We are going to combine the three new features to enhance both Billing & AR.

Additionally, emailing the Customer Statements & Dunning Letters require the related Customer Contact to be configured for emailing invoices as well, we also want to "remind" users about this configuration feature as well (even though it already exists) so you can take advantage of the new features in AR.

GENERAL LEDGER							
ACCOUNT:		CHECKING				ACCOUNT NO. 1100	
				DEBIT	CREDIT		

General Ledger

GENERAL LEDGER							
ACCOUNT:		CHECKING				ACCOUNT NO. 1100	
				DEBIT	CREDIT		

Other Changes - General Ledger

- GL Workcenter - Chartfield Request is now Structure Request
- Users will now use Structure Request to request new chartfields. This is the same business process with new pages.

← 🕒 ❤️ 🏠 🔔 ⋮ 🗨️

Financial Structure Request

General Information

Request ID 0000000017	Request Status In Progress
User ID <input type="text"/>	Entered By COREKlabenJ OSC-Klaben James
*Requester OSC-Klaben James	*Reason for Request <input type="text" value="Add a new DEPTID"/>
*Email Address james.klaben@ct.gov	Confidential <input type="checkbox"/> No
*Telephone 203/892-9999 <input type="text"/>	
Request Comment <input style="width: 100%; height: 40px;" type="text"/>	

Discussion / Attachments

🗨️ Discussion / Attachments (0)
>

Request Lines

1 row

ID	Status	Business Unit	SetID	Field Name	Template Type	
1	In Review	STATE	STATE	DEPTID	ChartField	<input type="button" value="Justification"/> <input type="button" value="Request Detail"/>



Other Changes - General Ledger

New Chartfield called Chartfield 3

Chartfield 3 will be used for reporting purposes with central agencies for major events such as storms, major projects, etc.

Advanced Configuration

Configure Chartfields

Status	Order	ChartField	Field Long Name	Field Length	
<input type="checkbox"/> Active ChartField	1	FUND_CODE	Fund Code	5	Change Name
<input type="checkbox"/> Active ChartField	2	DEPTID	Department	10	
<input type="checkbox"/> Active ChartField	3	CLASS_FLD	Special ID	5	Change Name
<input type="checkbox"/> Active ChartField	4	PROGRAM_CODE	Program Code	5	Change Name
<input type="checkbox"/> Active ChartField	5	ACCOUNT	Account	10	
<input type="checkbox"/> Active ChartField	6	BUDGET_REF	Budget Reference	8	Change Name
<input type="checkbox"/> Active ChartField	7	CHARTFIELD1	ChartField 1	10	Change Name
<input type="checkbox"/> Active ChartField	8	CHARTFIELD2	ChartField 2	10	Change Name
<input checked="" type="checkbox"/> Active ChartField	9	CHARTFIELD3	ChartField 3	10	Change Name
<input type="checkbox"/> Active ChartField	10	BUSINESS_UNIT_PC	PC Business Unit	5	
<input type="checkbox"/> Active ChartField	11	PROJECT_ID	Project	15	
<input type="checkbox"/> Active ChartField	12	ACTIVITY_ID	Activity	15	
<input type="checkbox"/> Active ChartField	13	RESOURCE_TYPE	Source Type	5	
<input type="checkbox"/> Active ChartField	14	RESOURCE_CATEGORY	Category	5	
<input type="checkbox"/> Active ChartField	15	RESOURCE_SUB_CAT	Subcategory	5	

Buttons: [Activate](#) [Inactivate](#) [Delete](#) [Add New ChartField](#) [Preview](#) [Configure](#)

Other Changes - General Ledger

New Fluid General Ledger WorkCenter. The new WorkCenter replaces the classic WorkCenter with updated visuals.

General Ledger WorkCenter

My Work

Current Work

Exceptions

Links

Manage and Monitor Journals

- Create/Update Journal Entries
- Copy Journals
- Spreadsheet Journal Import
- Edit Journals
- Mark Journals for Posting
- Post Journals
- Enter Budget Journals
- Enter Budget Transfer

Journals Ready for Post 1 row

Actions [dropdown] [filter]

General | Detail 1 | Detail 2 | Show All

<input type="checkbox"/>	Unit ↑↓	Journal ID ↑↓	Journal Date ↑↓	UnPost Sequence ↑↓	Line Unit ↑↓	InterUnit ↑↓	Description ↑↓	Status ↑↓	Budget Status ↑↓	Source ↑↓	Lines ↑↓
<input type="checkbox"/>	STATE	0002350133	05/30/2024		STATE	No		Valid	Valid	OSC	2





Strategic Sourcing



Reporting Issues / Contact Information

- Create a FootPrints Ticket <https://footprints.ct.gov/footprints>
- FootPrints Access – Contact Readiness@ct.gov

Service Catalog

 Create Category

Categories



Core-CT

Who to contact for Password Resets
Financials
HRMS
EPM
Security
STARS
Technical Issues
TRS-Teachers' Retirement

[Find Services](#)



UPGRADE TESTING - FINANCIALS

FOR UAT APPROVED TESTERS ONLY - PLEASE USE THE REGULAR SERVICE CATALOG FOR PRODUCTION ISSUES

[Find Services](#)

Reporting Issues / Contact Information

Service Catalog → UPGRADE TESTING - FINANCIALS

 Edit this Category  Create Subcategory  Create Service

 Help

Search Category 

Subcategories



Upgrade Testing - Accounts Payable

[Find Services](#)



Upgrade Testing - Accounts Receivable

[Find Services](#)



Upgrade Testing - Asset Management

[Find Services](#)



Upgrade Testing - Billing

[Find Services](#)



Upgrade Testing - Catalog Management

[Find Services](#)



Upgrade Testing - General Ledger/Commitment Control

[Find Services](#)



Upgrade Testing - Grants

[Find Services](#)



Upgrade Testing - Inventory

[Find Services](#)



Upgrade Testing - Project Costing/Customer Contracts

[Find Services](#)



Upgrade Testing - Purchasing

[Find Services](#)



Upgrade Testing - Supplier Contract Management

[Find Services](#)



Upgrade Testing Strategic Sourcing

[Find Services](#)



Upgrade Training - eProcurement

[Find Services](#)

Reporting Issues / Contact Information

Service Catalog → UPGRADE TESTING - FINANCIALS → Upgrade Testing - Billing Help

Edit this Category Create Subcategory Create Service Search Category GO

Services in this Category

- [UAT-FIN-BI - Adjust Invoice](#)
- [UAT-FIN-BI - Create Contact](#)
- [UAT-FIN-BI - Finalize & Print](#)
- [UAT-FIN-BI - General Invoice Issues](#)
- [UAT-FIN-BI - Miscellaneous Issues](#)
- [UAT-FIN-BI - Printing Invoices](#)

Configure Display

Service Catalog → UPGRADE TESTING - FINANCIALS → Upgrade Testing - Billing → UAT-FIN-BI - Finalize & Print

Request this Service Edit Delete Hot List

Details of UAT-FIN-BI - Finalize & Print

Status
Active

Service Category
Upgrade Testing - Billing

CI Number
66-3

Attributes Attachments

SERVICE REQUEST
UAT-FIN-BI - Finalize & Print
BEFORE YOU SUBMIT

Please make sure you provide a detailed description of the problem you are reporting with screen shots if necessary.

Please click "Request this Service" above to submit a ticket.

UAT Support

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

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 Meetings	Content
July 8, 2024	Slides (pdf) - 7/8 Change Agent Meeting Slides Q&A (.xlsx) - 7/8 Change Agent Meeting Q&A Recording (mp4) - 7/8 Change Agent Meeting recording
May 2, 2024	Slides (pdf) - 5/2 Change Agent Meeting Slides Recording (mp4) - 5/2 Change Agent Meeting recording Q&A (.xlsx) - 5/2 Change Agent Meeting Q&A
February 1, 2024	Slides (pdf) - 2/1 Change Agent Meeting Slides Recording (mp4) - 2/1 Change Agent Meeting recording Q&A (.xlsx) - 2/1 Change Agent Meeting Q&A MFA Sample Spreadsheet(.xlsx)
November 2, 2023	Slides (pdf) - 11/2 Change Agent Meeting Slides Recording (mp4) - 11/2 Change Agent Meeting recording



<https://www.core-ct.state.ct.us/2024-08-09-FILES/CP-UAT-Main.aspx>

The screenshot shows the user interface for the Core-CT HRMS/FINANCIALS/REPORTING SYSTEM. At the top, there is a navigation bar with the State of Connecticut logo, the text "State of Connecticut", the Governor Ned Lamont logo, and the text "Governor Ned Lamont". Below this is the main header with the "Core-CT" logo and the text "HRMS/FINANCIALS/REPORTING SYSTEM". A secondary navigation bar contains links for "Home", "About Us", "Help", and "Contact".

The main content area is titled "User Acceptance Testing (UAT) Support". On the left side, there is a vertical menu with the following items: LOGIN, SELF-SERVICE, HRMS, FINANCIALS, EPM, SECURITY, TRAINING, CORE-CT MAIL, CATALOG OF REPORTS, and STARS. Below the menu are logos for the "OFFICE of the STATE COMPTROLLER" and "DAS".

The central content area features a table with three columns: "Test Environment Hours", "UAT Testing Issue?", and "Training Documentation".

Test Environment Hours	UAT Testing Issue?	Training Documentation
FINANCIALS 7:00 am - 7:00 pm	Log a FootPrints Ticket click here	Access training documentation by clicking the appropriate link below:
HRMS 7:00 am - 4:00 pm	Need help using FootPrints? Click on a job aid below:	HRMS
CRM 7:00 am - 4:00 pm	How to Submit a Ticket	FINANCIALS
EPM 7:00 am - 4:00 pm	How to Search & View a Ticket	CRM
STARS TBD	How to Update a Ticket	

Below the table is a section titled "Test Environment Status Updates and Alerts" which contains the text: "Currently no status updates are available."

UAT Support – Clearing Cache/Browser Info

- Clear your Cache <https://www.core-ct.state.ct.us/help.html>
- Please use a separate/different browser to keep environments separate
- And/or use a new window with In Cognito browsing for the test environment
- And/or use a new In Private window in Edge



The screenshot shows the top navigation bar of the Core-CT website. On the left, it says "CT.GOV Connecticut's Official State Website". On the right, it says "Governor Ned Lamont". Below this is the "Core-CT" logo and the text "HRMS/FINANCIALS/REPORTING SYSTEM". A navigation menu contains "Home", "About Us", "Help", and "Contact". The main content area features a "Browser Information" section with a list of links: "Opening a Browser in a Private Session - updated November 2023", "Clearing Browser Cache - updated November 2023", "How to Manage Pop-up Blockers - updated May 2022", "Browsers Supported by Core-CT - updated May 2022", and "Clearing Cache on TC75 Module Device".

Questions



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.