

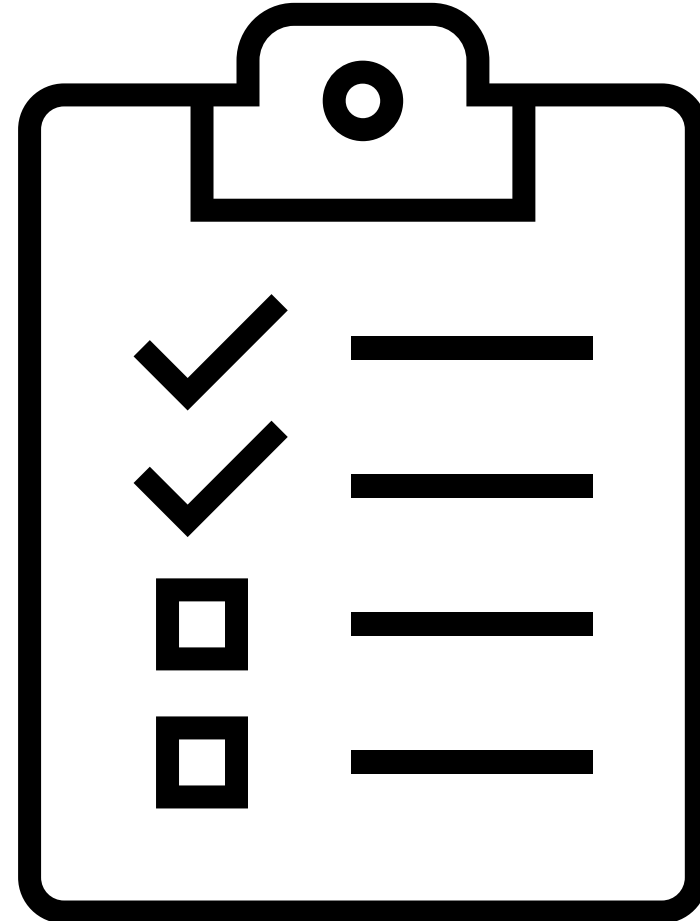


# Core-CT Modernization User Group Change Agent Kickoff

February 1, 2024

# Agenda

- Welcome
- Timeline
- eProcurement
- Approvals (AWE)
- Training Approach
- Core-CT Modernization Page
- New Functionality
- Next Steps

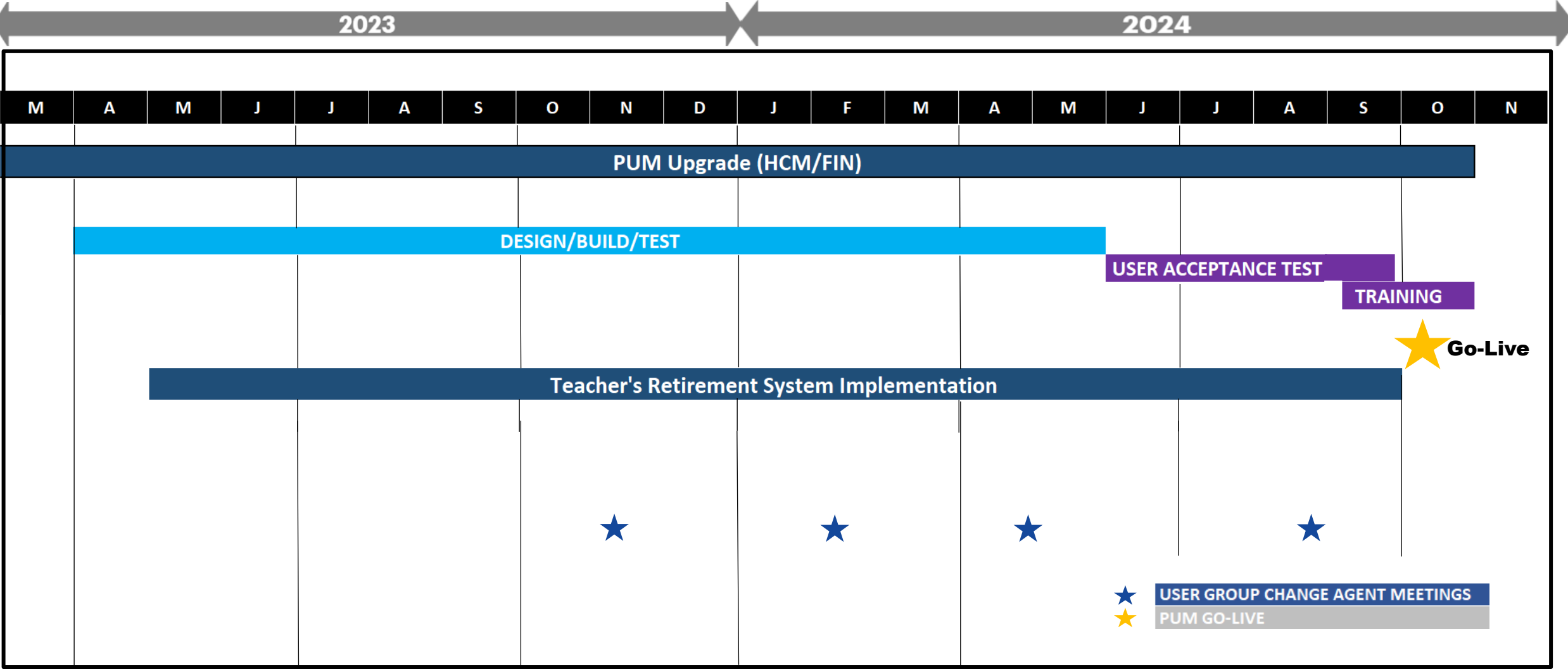


# Core-CT Modernization Project Goals

- Upgrade HCM, CRM, and FIN applications.
- Introduce Multi-Factor Authentication capabilities to Core-CT.
- Enhance Core-CT's user interface on mobile device capabilities.
- Implement new features in Core-CT.



# Core-CT Modernization Timeline



# 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:** provides quick access to useful information by presenting tiles to the user



# eProcurement Overview

- From the designated fluid homepage, tiles can be found that are related to eProcurement.
- The tiles on the page will be an assortment of ePro menu items that will assist in navigating to reporting or transactional pages.



# eProcurement Fluid Overview

eProcurement ▾

Tiles displayed may vary based on user access.


**Create Requisition**



**My Requisitions**



**Create Receipt**



**My Receipts**



**Approvals**



27

**Convert REQ to Contract**  
Convert REQ to Contract

# Fluid Requisition (Requisition Defaults)

- The page *Requisition Defaults* replaces the current *Define Requisition* page
  - Note: Only the name changes.
- Defaults information for newly added Requisition lines.

**Requisition Defaults**

Cancel Done

▼ Header Defaults

Business Unit: US001 Requisition Name:

Requester: ACC\_SKINDELT  
Accenture-Sean Kindelt

Priority: Medium

Currency: USD

▼ Line Defaults

Supplier ID:  Category:

Supplier Location:  Unit of Measure:

Buyer:

▼ Shipping Defaults

Ship To: ALBERTA Attention:

Due Date:

▼ Distribution Defaults

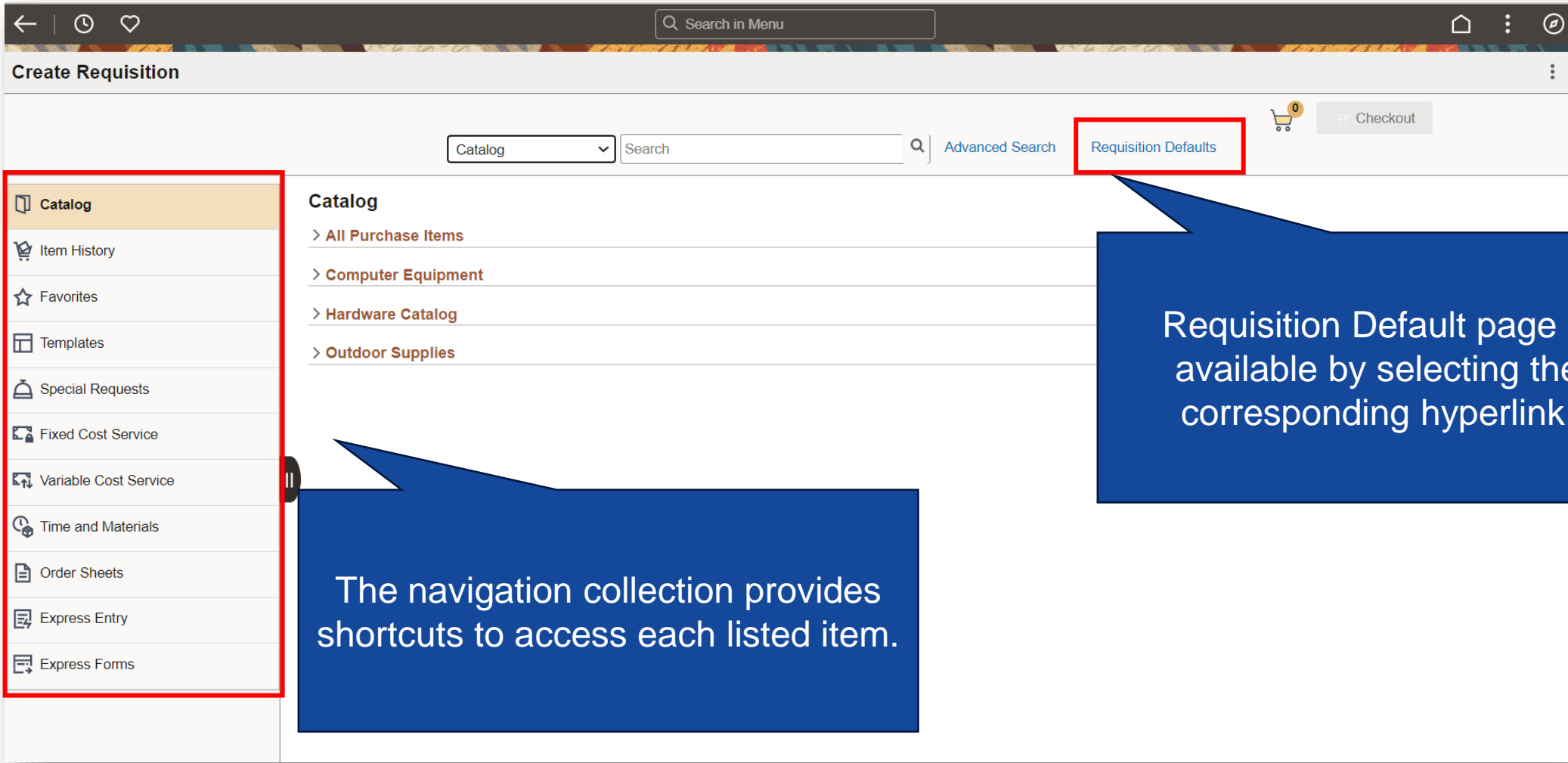
Accounting Tag:

1 row

Chartfields1	Chartfields2	Chartfields3	Details	Asset Information	Show All
Distribution Line	Percent	Location	GL Unit	Account	Alternate Account
1	0.0000	0123456	US001	100000	<input type="text"/>



# Fluid Requisition (Requisition Defaults)



# Requisition Persistent Cart



 Checkout

on Defaults

- Items remain in cart from previous session.
- Requestor and BU can only be changed once cart has been emptied.

# My Requisition

eProcurement ▾

**Create Requisition**



27

**My Requisitions**



**Create Receipt**



**My Receipts**



**Approvals**



**Convert REQ to Contract**  
Convert REQ to Contract

Requisitions can be accessed by selecting the My Requisitions tile.

# My Requisition

My Requisitions

3 rows

Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
⌵	0000000208	US001/0000000208	05/01/2023	ACC_SKINDELT	Pending	Not Chk'd	30.00 USD
⌵	0000000206	US001/0000000206	04/20/2023	ACC_SKINDELT	Approved	Valid	70.00 USD
⌵	test	US001/0000000205	04/14/2023	ACC_SKINDELT	Partially Received	Valid	80.00 USD

- Review status and take action on existing requisitions.
- Page default requisition for Requester and BU defaulted on User preference, user can click on filter icon to update/remove this criteria.
- Replaces functionality of Manage Requisitions page.

# Approvals Overview


- To enhance user experience, approval transactions can be found within the “Approvals” tile from the Fluid homepage.
- Within this tile, approved, denied and pending approvals are listed for users to view. These transactions can be viewed in detail to conduct the action necessary (i.e.: Approve, Deny, Push Back).
  - *Note: approvals are based on security access*



# Approvals


Employee Self Service ▾

**Expenses**




**0.000** Unapplied Charges

**My Service Requests**



**0** Open Requests

**My Preferences**



**Travel Authorizations**



**0** Pending Requests

**eProcurement**



**Approvals**



**26**

Tiles displayed may vary based on user access. Approvals can be accessed by selecting the tile.

# Approvals

Navigation bar with icons for back, clock, heart, search, home, notifications, and menu. Search bar contains "Search in Menu".

## Pending Approvals

- View By Type ▼
- All 26
- Asset Disposal 12
- Purchase Order 2
- Requisition 5
- Supplier 5
- Supplier Registration 2

### Requisition

<input type="button" value="Approve"/> <input type="button" value="Deny"/> <input type="button" value="Pushback"/>			5 rows
<input type="checkbox"/>			
<input type="checkbox"/>	<b>Requisition</b> 440.00 USD	US001 / 0000000203 DEMOUSER ⚠ Medium Priority	Routed 01/16/2019 >
<input type="checkbox"/>	<b>Requisition</b> 100.00 USD	Test - US001 / 0000000204 DEMOUSER ⚠ Medium Priority	Routed 12/06/2021 >
<input type="checkbox"/>	<b>Requisition</b> 100.00 USD	US100 / 0000000058 Mary Lewis ⚠ Medium Priority	Routed 04/27/2023 >
<input type="checkbox"/>	<b>Requisition</b> 211,200.00 USD	US001 / 0000000207 Rabi Sengupta ⚠ Medium Priority	Routed 05/01/2023 >
<input type="checkbox"/>	<b>Requisition</b> 576.00 USD	US100 / 0000000059 Mary Lewis ⚠ Medium Priority	Routed 05/05/2023 >

### Approver Comments

Pending approvals will be categorized with the total number associated for each. Select each category to display the pending approvals within each group.



# Approvals

Requisition

**Requisition**  
440.00 USD

**Requisition**  
100.00 USD

**Requisition**  
100.00 USD

**Requisition**  
211,200.00 USD

**Requisition**  
576.00 USD

Approver Comments

US001 / 000000203 DEMOUSER  
Medium Priority

Approve Deny Pushback

5 rows

**Filters**

Type: Requisition

Requester:

From:

Date Period:

Priority:

Reset

Pending approvals list can be filtered.



# Approvals

**Requisition**

Request for US001/0000000203  
440.00 USD

Header is pending your approval

**Summary**

Business Unit	US001	Requisition ID	0000000203
Routed Date	January 16, 2019	Requisition Date	January 16, 2019
Requester	DEMOUSER	Entered by	DEMOUSER
Approval Justification	here is the justification	Budget Header Status	Not Budget Checked

[Edit Requisition](#)

**More Information**

- Header comments and attachments >
- View Printable Version >

**Lines**

Line Number	Item Description	Merchandise Amount
1	test	440.00 USD

Approver Comments

Approval Chain >

Select a transaction from the pending approval list to display the summarized details. Choose the desired action.

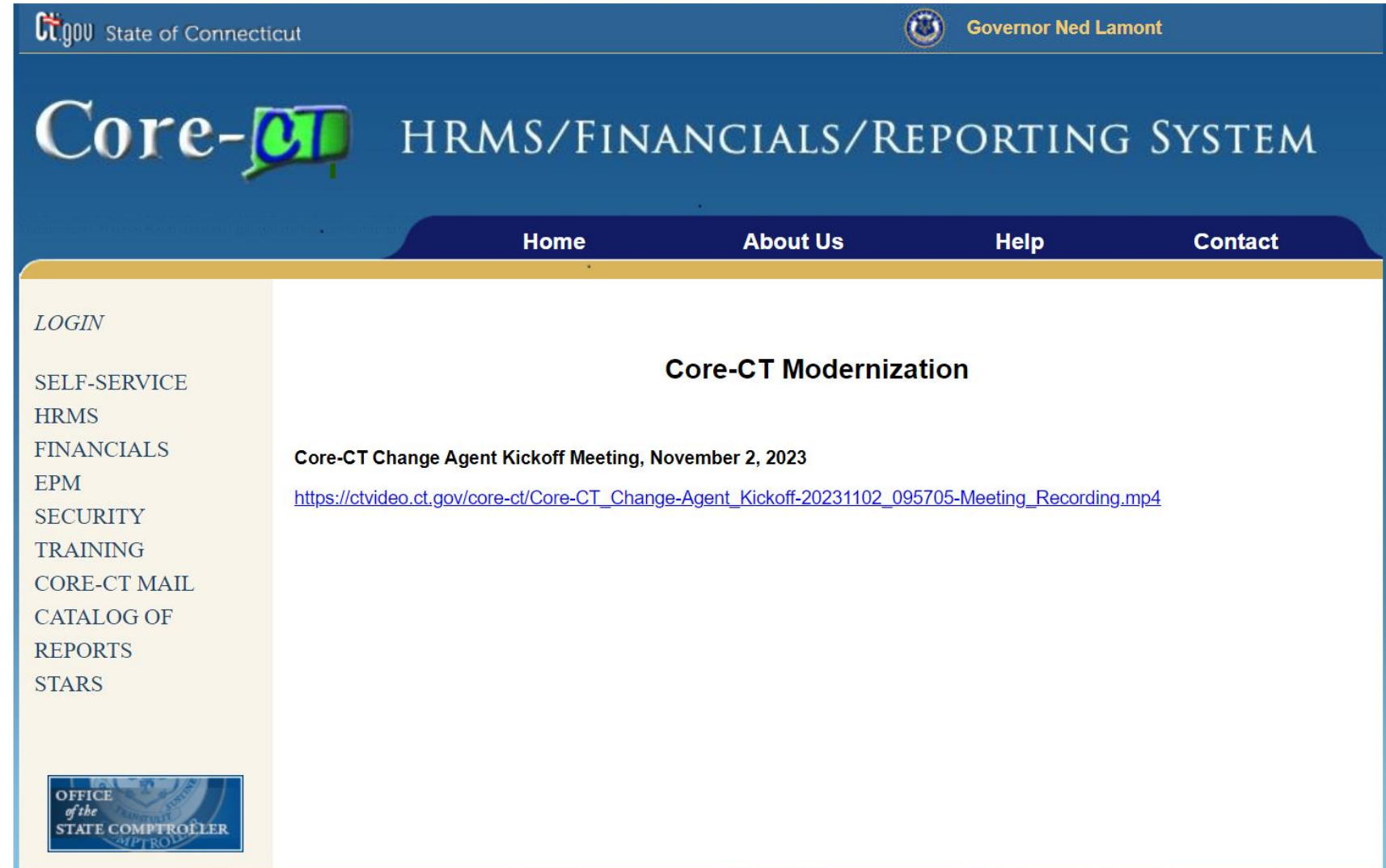
# Training Approach

	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
Overview	Captivate E-Learning Video supported by Job Aids	Virtual Instructor-Led Training Supported by: Participant Guides, Training Environment Scenarios, Job Aids	Job Aids and Videos will provide “on the job support”
Advantages	<ol style="list-style-type: none"> <li>1. Short videos that can be viewed <b>anytime</b></li> <li>2. Ability to train <b>users in multiple locations</b> at the same time.</li> <li>3. <b>Scenario-based learning</b>: create realistic scenarios and simulations that reflect real-world situations.</li> </ol>	<ol style="list-style-type: none"> <li>1. Flexibility and <b>Convenience</b>, allows learners to participate in training sessions from any location with an internet connection.</li> <li>2. Ability to demo the training environment and give users the <b>opportunity to practice</b>.</li> <li>3. Engages the user group to accelerate adoption</li> </ol>	<ol style="list-style-type: none"> <li>1. Offers flexibility to the learners to <b>upskill at their own pace</b> and anytime, anywhere</li> <li>2. Integrate different <b>elements</b>, such as an online platform, participant guides, videos etc. to increase engagement</li> <li>3. Offers the ability to complete the training <b>more than once</b></li> </ol>
Considerations	<ol style="list-style-type: none"> <li>1. <b>Size of the user group</b> and the number of training sessions required</li> <li>2. <b>Team resources</b> and availability to deliver training</li> <li>3. <b>End user availability</b> to attend training sessions particularly those who work shift patterns</li> </ol>	<ol style="list-style-type: none"> <li>1. <b>Technology requirements</b> such as laptop/computer availability, Wi-Fi connection, audio etc.</li> <li>2. Preparation required to ensure <b>virtual training is engaging</b>, especially if the training duration is for a long period of time</li> </ol>	<ol style="list-style-type: none"> <li>1. <b>Technology requirements</b> such as laptop/computer availability, Wi-Fi connection, audio etc.</li> <li>2. <b>Reliance on the user group</b> to independently complete self-study training</li> </ol>

# Core-CT 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.



The screenshot shows the Core-CT Modernization page on the State of Connecticut website. The page header includes the State of Connecticut logo and Governor Ned Lamont's name. The main title is "Core-CT HRMS/FINANCIALS/REPORTING SYSTEM". The navigation menu includes Home, About Us, Help, and Contact. The left sidebar contains a list of links: LOGIN, SELF-SERVICE, HRMS, FINANCIALS, EPM, SECURITY, TRAINING, CORE-CT MAIL, CATALOG OF REPORTS, and STARS. The main content area features a heading "Core-CT Modernization" and a link to a video recording of a "Core-CT Change Agent Kickoff Meeting, November 2, 2023". The footer includes the logo for the Office of the State Comptroller.

ct.gov State of Connecticut Governor Ned Lamont

## Core-CT HRMS/FINANCIALS/REPORTING SYSTEM

Home About Us Help Contact

*LOGIN*

SELF-SERVICE  
HRMS  
FINANCIALS  
EPM  
SECURITY  
TRAINING  
CORE-CT MAIL  
CATALOG OF REPORTS  
STARS

### Core-CT Modernization

Core-CT Change Agent Kickoff Meeting, November 2, 2023  
[https://ctvideo.ct.gov/core-ct/Core-CT\\_Change-Agent\\_Kickoff-20231102\\_095705-Meeting\\_Recording.mp4](https://ctvideo.ct.gov/core-ct/Core-CT_Change-Agent_Kickoff-20231102_095705-Meeting_Recording.mp4)

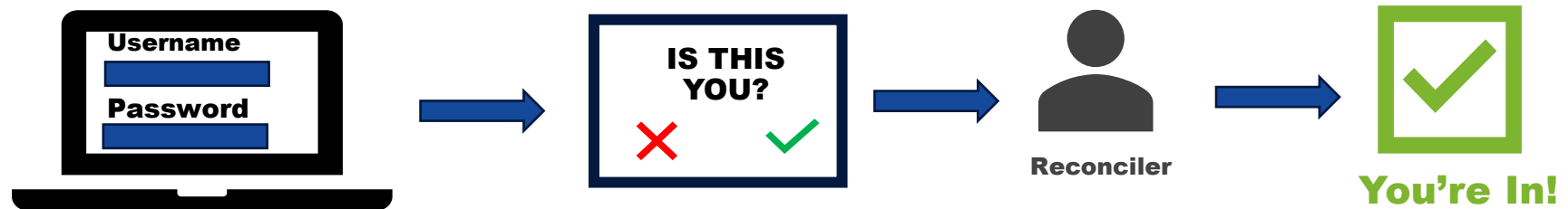
OFFICE of the STATE COMPTROLLER



# New Enhancements – Multi Factor Authentication

- Multi Factor Authentication (MFA) will be introduced to access Core-CT from outside of a State network.
  - Note: When on the State Network, users will not have to reauthenticate MFA
- Work with your Agency's Leadership to nominate a person at your agency who will be responsible for reconciling Core-CT users to the Azure Exec Directory
- Please send identified individual to the readiness email by **2/16**. They will be expected to attend the training session for this process.
  - Send name and email address to the Readiness mailbox; [Readiness@CT.gov](mailto:Readiness@CT.gov)
  - Training is anticipated to occur early March... more details to come!

....More details on this roll out to come!



# New FIN Enhancements

- Enable ChartField3 in Chart of Accounts for State-Wide Reporting
- Implement Excel PO Voucher Upload
- Enable Delivered Book-to-Bank Reconciliation

## For Vendors:

- Enable Vendor access to 1099s (PDF) via Vendor Self Service
- Enable PO Search and allow vendors to see their POs (PDFs)

**....and much more to come!**



**Growing Core-CT Capabilities**

# New HR Enhancements

- Direct Deposit Self-Service
- W-4 Self Service
- Health and Safety Incident Reporting Self Service

**....and much more to come!**



**Growing Core-CT Capabilities**

# Questions



# Next Steps

- Share this content with your teams to be posted on the Core-CT Modernization Page
- Plan to attend next quarterly Change Agent Meeting (early May)
- Reach out to [Donna.Braga@ct.gov](mailto:Donna.Braga@ct.gov) with any follow ups you might have