



Core-CT PUM Upgrade User Group Change Agent Kickoff

November 2nd, 2023

Agenda

- Welcome
- Core-CT Modernization Project
- User Group Change Agent Overview
- PUM Timeline
- Fluid Navigation
- HRMS Changes - Fluid Timesheet
- Cloud Migration
- Next Steps

Core-CT Modernization Project Goals

- Upgrade HCM, CRM, and FIN applications to newest PUM version.
- Introduce Multi-Factor Authentication capabilities to Core-CT.
- Implementation of Fluid Pages for HCM and FIN.
- Enhance Core-CT's user interface on mobile device capabilities.

User Change Agent

Nominated based on the following qualities:

- Someone who likes change and is well-respected in your agency
- Strong communicator
- Financials and/or HCM subject matter expert
- Is looking for opportunity and visibility on a big project

Expectations of a User Group Change Agent:

- Join our User Group Change Agent Network and attend User Group Change Agent Meetings and/or Calls
- Encourage adoption and excitement
- Provide any agency-specific information needed by the project
- Escalate any agency/questions or concerns to the Core-CT Operations Lead
- Be a positive Agent for change

User Group Change Agent Overview

A Change Network engages employees who are impacted by the change at various levels and helps prepare the institution for a smooth transition.

DESCRIPTION OF THE USER GROUP CHANGE NETWORK



Raise awareness among those who don't know about the PUM Upgrade



Communicate benefits and **persuade resisters to embrace the change** by leveraging their established credibility and trust



Foster commitment and help others embrace the solution by talking positively about the changes the PUM Upgrade will bring



Leverage expertise and influence to continue **supporting the change beyond go-live**

OBJECTIVES OF USER GROUP CHANGE NETWORK



People Readiness

- Employees are appropriately informed, trained, and otherwise prepared for the PUM Upgrade
- Where there is resistance, people have had the opportunity to have their concerns heard and addressed



Risk Mitigation

- Likely risks from business areas or locations are identified and mitigated
- Where risks are realized, they are managed locally by those who know the business best



Implementation Support

- System has been tested for solution effectiveness, ease of use by end users
- Employees have local, sustained support from peers who understand their business and daily work

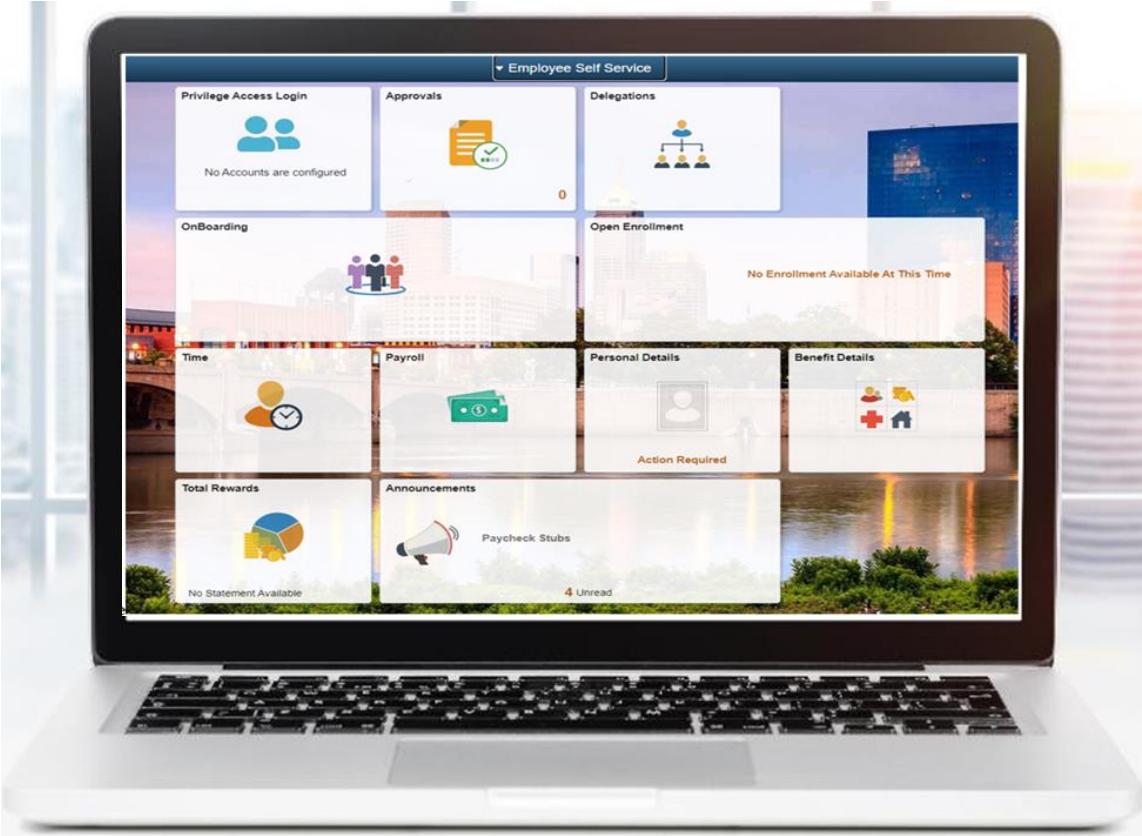


Operational Readiness

- Logistics and infrastructure is prepared for the PUM Upgrade
- Business areas have had the opportunity to plan appropriately for the PUM Upgrade

What is Fluid User Interface?

A modern user interface with the flexibility to use PeopleSoft applications on any device.



- A modern user interface that provides a simple, sleek look and feel, resembling many of the web applications used today on tablets and smartphones.
- It is designed to be used on mobile devices as well as laptops and desktops and is responsive to the device operating system being used.
- Fluid applications present a common user experience on a variety of devices regardless of screen size.
- The Fluid User Interface is the standard user interface used by a majority of PeopleSoft customers. Classic Plus adds the Fluid styling to classic desktop pages for continuity across all your PeopleSoft applications.

Benefits of Fluid

- **Modern and Sleek Look:** The Fluid User Interface provides a simple, sleek look and feel, resembling many of the web applications used today on tablets and smartphones.
- **Responsive Design:** Fluid is designed to be used on mobile devices as well as laptops and desktops and is responsive to the device formatting being used.
- **Consistent User Experience:** Fluid applications present a common user experience on a variety of devices regardless of screen size.
- **Continuity Across Applications:** Classic Plus adds the Fluid styling to classic desktop pages for continuity across all your PeopleSoft applications.

Classic Navigation

The screenshot displays the 'Manager Self Service' interface. At the top, there is a navigation bar with a 'Menu' dropdown, a search field 'Search in Menu', and utility icons for home, notifications, and user profile. The main content area features a grid of six cards: 'Approvals' (14), 'Team Time' (2201 Exceptions), 'Absence Analytics', 'Team Performance' (17 In Progress Documents), and 'Open Jobs' (8). On the right side, a 'NavBar' is visible with icons for 'Recently Visited', 'Favorites', 'Menu' (highlighted with a red box), 'My Team', and 'Team Time'. A blue callout bubble points to the 'Menu' icon in the NavBar, containing the text: 'Users can use the navigation Bar and select menu for classic page navigation'.

Classic Navigation

Manager Self Service

Approvals 14

My Team 22

Absence Analytics

Team Performance 17 In Progress Documents

Delegations

Report Time

NavBar: Menu

- Self Service
- Manager Self Service
- Recruiting
- Workforce Administration
- Benefits
- Compensation
- Time and Labor
- Payroll for North America
- Workforce Development
- Organizational Development
- Set Up HCM

Fluid Navigation via Tiles

Employee Self Service ▾

Personal Details



Enter Time

09/29/23 - 10/12/23



● Reported 0.00

● Scheduled 80.00

Users can access a page through the tile on the homepage.

Fluid Navigation via Favorites

The screenshot displays the 'Employee Self Service' interface. At the top, a navigation bar includes a heart icon (Favorites) highlighted with a red box and a red arrow pointing to a 'Favorites' pop-up window. The pop-up window lists 'Add/Update POs' with a heart icon. On the right side, a 'NavBar' is visible, featuring a heart icon (Favorites) also highlighted with a red box. A blue callout bubble points to the 'Favorites' icon in the NavBar with the text: 'Users can also access the page through favorites on the global header or the navigation bar.'

Timesheets Available for Entry

Timesheets available for entry	Desktop or Mobile time entry
Enter Time Page <ul style="list-style-type: none">• Displays Time Entry by time pay period	Desktop Only
Weekly Time Entry Page	Both
Report Time Page <ul style="list-style-type: none">• Displays Time Entry by Day	Both

Enter Time Page

- Configured in collapsed view where an additional click is required to enter time detail such as shift, combo code etc.
- Tabs no longer exists on Timesheet to display reported time summary, leave and comp balances, payable time summary etc. This detail is available via individual tile or clicking on the drop-down arrow next to each day on the timesheet, which displays various actions.

Enter Time

Christelle Stevenson
Manager-Accounting

September 15, 2023 - September 28, 2023

Scheduled 80.00 | Reported 48.00

*View By Period

Submit

*Time Reporting Code	Quick Fill/Time Details	Row Totals	15 Fri	16 Sat	17 Sun	18 Mon	19 Tue	20 Wed	21 Thu	22 Fri	23 Sat	24 Sun
KUREG - Regular		48.00	0 of 8	0 of 0	0 of 0	0 of 8	8 of 8	0 of 8	8 of 8	0 of 0	0 of 0	0 of 0

Time Detail


Actions

- Time Summary
- View Exceptions
- Payable Time
- Add/View Comments

Weekly Timesheet

- Fields pay period begin and pay period end date and the pay period week 1 or 2 to will be displayed on the top of the weekly timesheet.

Weekly Time Entry

 **Christelle Stevenson**
Manager-Accounting

< 09/22/23 - 09/28/23 >

● Reported 24.00 ● Scheduled 40.00

Options Manual Entry Apply Review

Report Time

FRI SAT SUN MON
TUE WED THU

*Time Reporting Code Quick Fill


Quantity

Time Details

Rule Element 1 <input type="text"/>	Business Unit <input type="text"/> Global Business Institute BU
Task <input type="text"/>	User Field 1 <input type="text"/>
User Field 5 <input type="text"/>	Combination Code <input type="text"/>

ChartFields

Weekly Time Entry

 **Monica Baker**
Bookkeeper-Sr

< 08/21/23 - 08/27/23 >

● Reported 0.00 ● Scheduled 40.00

Options Manual Entry Apply Review

Report Time

MON
FRI

Apply Schedule
Copy from Previous Week
Manual Entry


*Time Reporting Code

*Time Reporting Code KUREG - Regular
Quantity 8 Hours

Report Time

- Single Date will be displayed on the top of the Report Time sheet .

Report Time

 **Christelle Stevenson**
Manager-Accounting

< **Thursday, Sep 28, 2023** >

Reported Status

● Reported 0.00 ● Scheduled 8.00

*Time Reporting Code Quick Fill

Quantity

Time Details

Rule Element 1 Business Unit Global Business Institute BU

Task User Field 1

User Field 5 Combination Code


[ChartFields](#)

Submitted 0 Hours

Comments (0) >

Last reported time was on Tuesday, Sep 26, 2023.

Report Time

 **Monica Baker**
Bookkeeper-Sr

< **Tuesday, Aug 15, 2023** >

Reported Status

● Reported 0.00
● Scheduled 8.00

*Time Reporting Code

Quantity Hours

> Time Details

Submitted 0 Hours

Comments (0) >

Last reported time was on Friday, Aug 11, 2023.



Timesheet Approval

Payable Time

Daryl Reese
Analyst-Financial

Approve Deny Pushback

4 line(s) are pending your approval

Summary

Quantity for Approval 19 Hours
Time Period 09/29/2014 - 09/30/2014

Payable Time Details

Pending All

Select	Report Date	Time Reporting Code	Quantity
<input type="checkbox"/>	09/29/14	KUREG - Regular	8 Hours
<input type="checkbox"/>	09/29/14	KUOVT - Overtime	2 Hours
<input type="checkbox"/>	09/30/14	KUREG - Regular	8 Hours
<input type="checkbox"/>	09/30/14	KUOVT - Overtime	1 Hours

Approver Comments

Approval Chain

Manager Self Service

1 of 2

Approvals

17

Payable Time

Christelle Stevenson
Manager-Accounting

5 line(s) are pending your approval

Approve Deny Pushback

Summary

Qu... 40 Hours
for
Ap...
Time 08/22/2023 -
Peri... 08/31/2023

Payable Time Details

Select	Report Date	Reporting Code	Quantity
<input type="checkbox"/>	08/22/23	KUREG - Regular	8 Hours
<input type="checkbox"/>	08/23/23	KUREG - Regular	8 Hours
<input type="checkbox"/>	08/24/23	KUREG - Regular	8 Hours
<input type="checkbox"/>	08/30/23	KUREG - Regular	8 Hours
<input type="checkbox"/>	08/31/23	KUREG - Regular	8 Hours

Approver Comments

Approval Chain

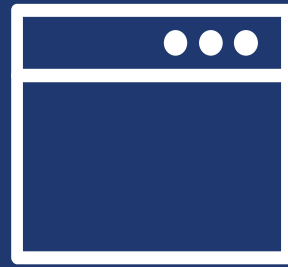
Core-CT in the Cloud

On November 13, 2023, Core-CT will be moving into the Cloud



Core-CT will be unavailable.

Thursday, November 9 at 5 pm until
Monday, November 13 at 7 am.



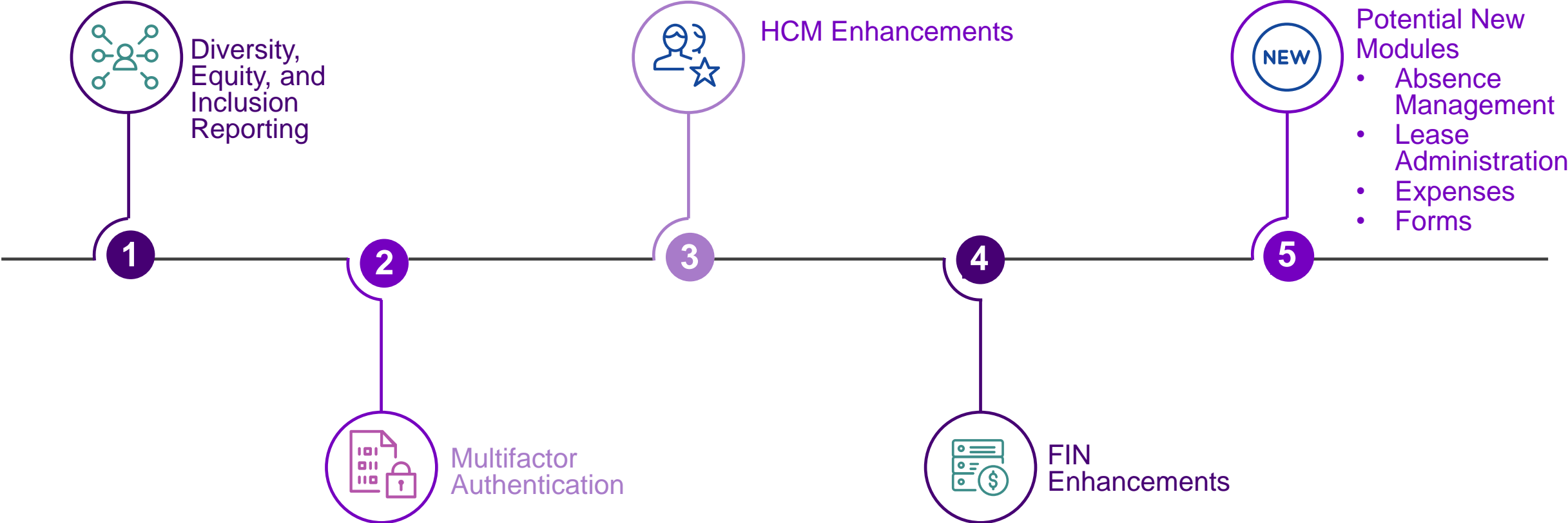
End Users should not be impacted.

The URL and the application will remain the
same.



If you encounter any issues,
Please call the Core-CT Helpdesk.

What's Next?



Core-CT Chartfield3

- Chartfield 3 is a NEW Chartfield that will be activated with the PUM Upgrade
- To be used by OSC and OPM as a method of reporting on programs/projects/issues that have state-wide impact
- Effective-Date of CF3 is TBD as part of upgrade review and design
- More to come....

Absence Management

PeopleSoft Absence Management allows for robust configuration of leave policies and rules to support entitlement processing (ex. Vacation, sick, FMLA) and absence take processing.

Benefits of Using Absence Management

- Allows for robust configuration and automation of leave policies and business rules exactly to State specifications which allows for replacing processes done manually example granting accruals manually
- Includes Employee and Manager self-service functionality to request, forecast, donate, track and approve leave
- Provides the ability to combine balances across multiple jobs
- Integrates with Outlook, PeopleSoft Time and Labor and Payroll for North America
- Includes analytics to get insight on leave trends

Lease Administration

PeopleSoft Lease Administration streamlines and automates site selection and acquisition, lease administration and space management. Whether an organization is a corporation, a public service provider, an educational institution, or a retail/franchise operation, PeopleSoft Lease Administration offers a comprehensive solution for reducing costs and minimizing contractual and financial risk.

Benefits of Using Lease Administration

- Effectively manage property and equipment leases with a comprehensive view of lease and space management information.
- Optimize space utilization with streamlined space assigning, occupancy and vacancy tracking, and monitoring capabilities for each defined space—utilize a unique, real-time graphical representation of space attributes, utilization, and occupancy for enhanced management capability.
- Ensure accounting compliance with a system-wide audit trail that tracks lease payments to voucher creation and payment processing, and lease receivables from billing to invoice and cash receipts.
- Enables data capture necessary to measure and recognize Lease Liability and Right of Use Asset as per the GASB-87 or ASC-842 or IFRS-16 Accounting Standards.
Note: GASB 87 accounting standards DOESNT apply (non-compliant) for Receivables leases
- Provides a more comprehensive view of the lease, where you will have access to Approvals (creation level or transaction level), clauses, options and critical dates, operating expenses, percent rent, security deposits, site selection and acquisition, my lease portfolio, and lease reports such as the lease abstract.
- Creation of Lease is limited to one asset per lease.
- Tracking, editing and approving; of lease options is limited to specific set of users via delivered Lease security, which is independent to Lease Administration module only (apart from roles and permission list).

Expenses

PeopleSoft Expenses is a type of application that simplifies the receipt-to-reimbursement process by automating much of it. With this software, automate expense report submission, streamline approvals, accelerate reimbursements, and track expense claims in real time.

Benefits of Using Expenses

- The Expenses module features can be categorized into five broad areas: travel authorizations, expense reports, cash advances, and employee profiles.
- The Expenses module is an important self-service application used to automate and streamline the employee travel and expense transactions.
- Allows the real-time tracking of expense transactions, easy of reimbursement, reduces admin work and potential fraud.
- Expense analytics reports give finance teams and senior staff better visibility into employee expenditures.

Go to www.menti.com and use code provided.



What's Next?

Questions?

Please reach out to
Donna.Braga@ct.gov

