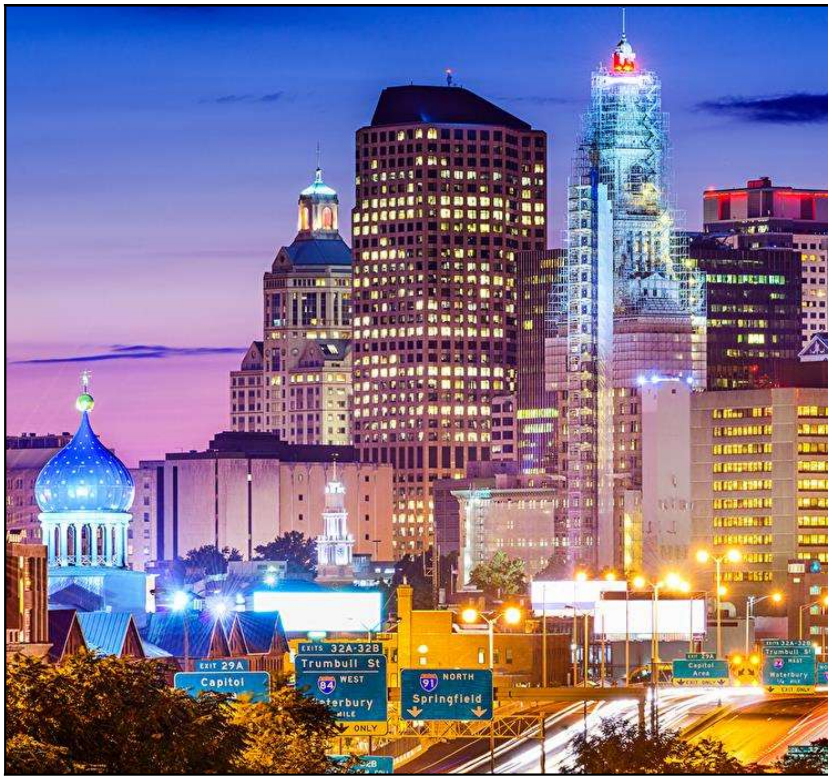

Core-CT

eProcurement

Core-CT Staff Training Guide

October 2024

Welcome to the eProcurement Course!

Today, we will explore the enhancements introduced by the upgrade to PeopleSoft.

Guidelines for today's class:

- Put cell phones on silent or vibrate
- Save your questions for the end of each unit.
- This course will provide an overview of system upgrades and changes

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Welcome to the eProcurement Course!

We ask that during this course you:

- Put cell phones on silent or vibrate and Remain engaged.
- questions can be asked at the end of each unit

In this course we will be covering the new upgrades to PeopleSoft and how they will affect eProcurement processes.

Course Intro

Core-CT

Trainer - Facilitator – Participant Roles

Trainer

- Cover course content
- Speak to the functionality
- Answer any questions at the end of each section

Facilitator

- Share the presentation: Training Material Location
- Manage time
- Direct questions from participants to the Trainer at the end of each section
- Share the course evaluation survey: eProcurement Course Survey

Participants

- Ask questions in the chat throughout the training

NOTE:

** Unable to turn on camera*

** Unable to speak*

Here is a brief overview of the Roles throughout the training.

<u>The Trainer will :</u>

- Covering the course content

- Speaking to the functionality

- & answer any questions at the end of each section

<u>The Facilitator will:</u>

- Share the presentation

- Manage time

- Direct questions from participants to the Trainer at the end of each section

The Participants will:

- Ask questions in the chat throughout the training

NOTE:

You will be unable to turn on camera

You will be unable to speak, so please make sure to ask your questions in the chat.

Benefits of Fluid User Interface

Intuitive & Easy to Use

- **Responsive** and can adapt to various screen sizes

Easier Navigation

- **Fast** and **intuitive** navigation
- Perform tasks **easier** and **faster**

Caters to Various Users

- **Self-service** users
- **Agency** users
- Executive **decision-makers**

A few of the benefits of the new Fluid User interface are:

- It's intuitive and easy to use
- Easier navigation
- Caters to various users

Course Intro

Learning Objectives

At the end of this course, you will be able to:

- **Create a new requisition**
- **Manage existing requisitions**
- **Requisition Approvals**
- **Create new receipts**
- **Manage existing receipts**

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The primary goal of this course is to provide an overview of creating new requisitions, managing current requisitions, approving requisitions, and generating new receipts, all within the new fluid UI (User Interface) for eProcurement.

Today's Agenda

Section
Course Overview and Objectives
Unit 1: Creating a New Requisition
Job Aids
Q&A
Unit 2: Manage Requisitions
Job Aids
Q&A
Unit 3: Approvals
Job Aids
Q&A
Unit 4: Receipts
Q&A

Core-CT

Unit 1: Creating a New Requisition

In this unit, we'll cover the process of creating a new requisition in the updated Fluid interface.

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In this unit we will explore the process of creating a new requisition in the updated Fluid UI

- ➢Discuss navigation changes
- ➢Compare revised pages
- ➢Provide an overview of the process once requisitions are submitted

Creating Requisitions Key Points

The requisitioning process is broken down into three (3) steps:

01	Requisition Defaults
02	Add Items and Services
03	Review and Submit

Create Requisitions Key Points

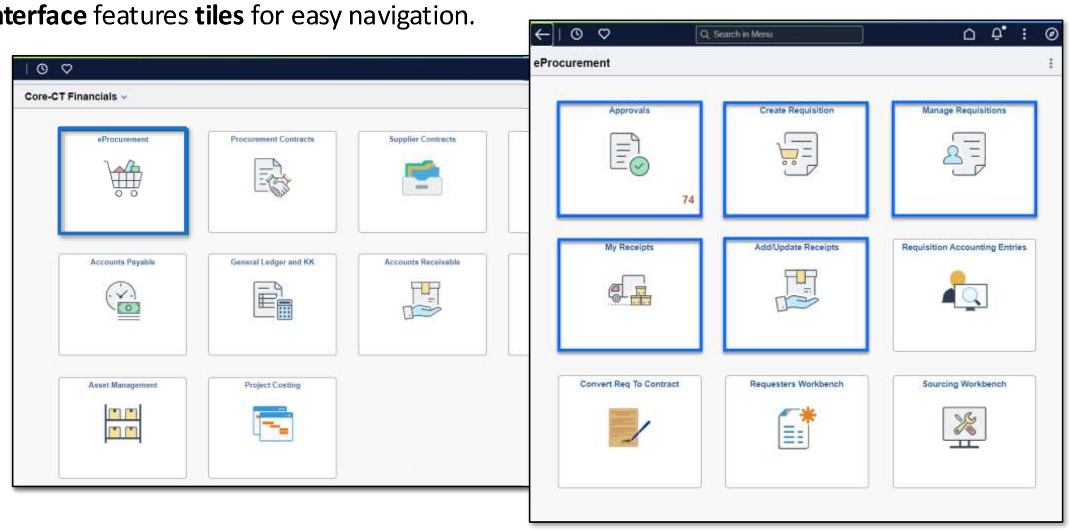
Three (3) step requisitioning process:

1. Define Requisition
2. Add Items and Services
3. Review and Submit

Unit 1: Creating a New Requisition

New Look

The **fluid interface** features **tiles** for easy navigation.



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<u>New Look</u>

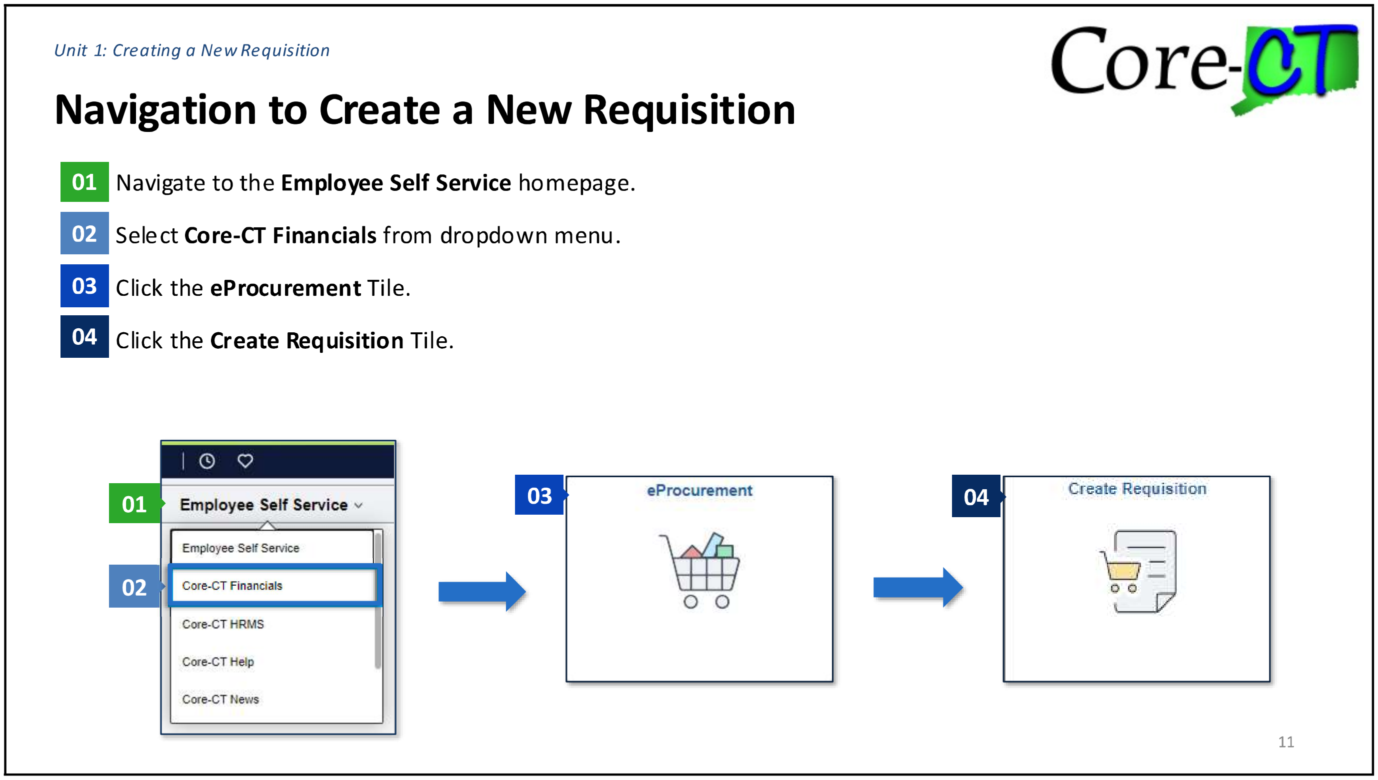
Here is a look at the brand new fluid interface. We have highlighted some of the new tiles you will be using for key eProcurement tasks including the eProcurement tile, approvals, create requisition tile, manage requisitions tile, my receipts tile, and add/update receipts tile

When to use an eProcurement Requisition

- When selecting items from the State Catalog.
- When buying office supplies via Punch-Out.
- When there is a need for a Special Request
- When submitting ITD10, DAS-BID, TSR, or PSA/POS Requisition Type.

When to use an eProcurement Requisition

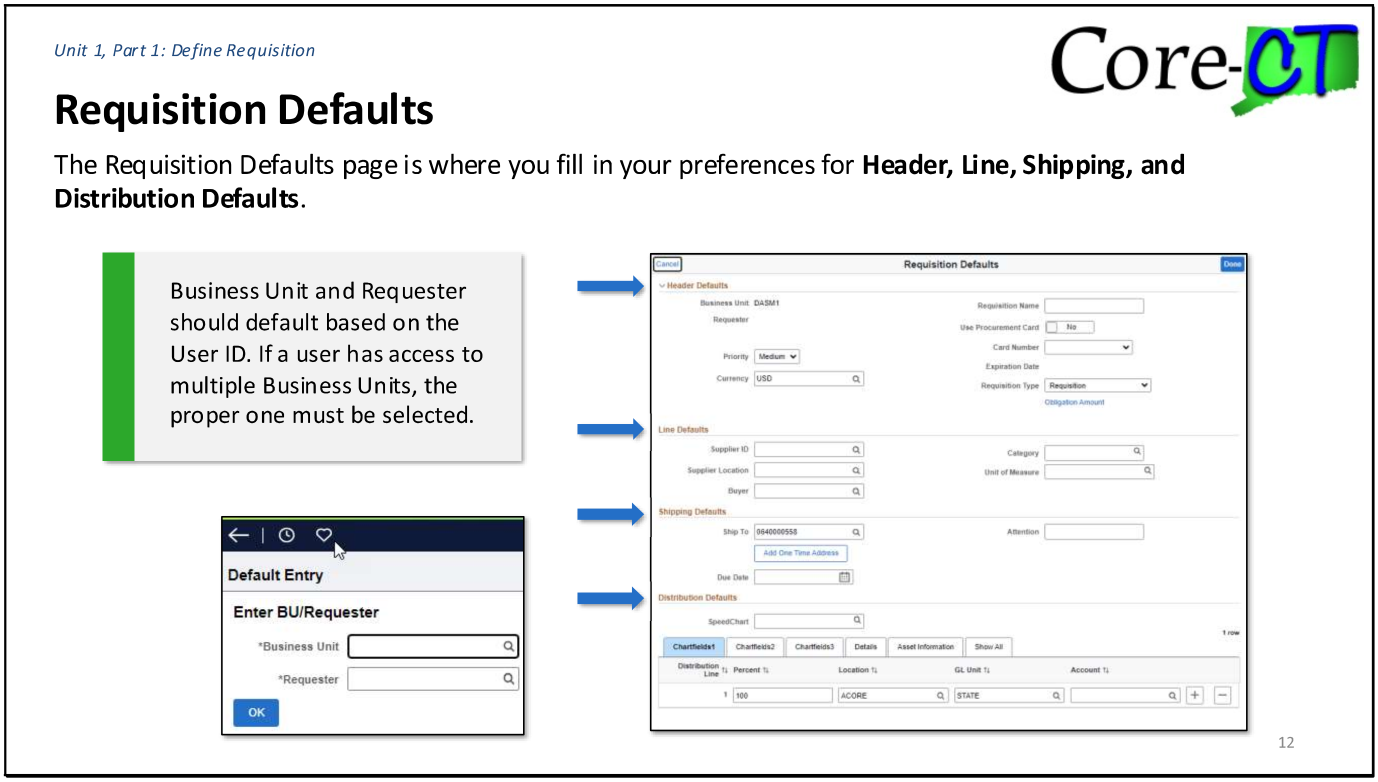
- When selecting from the State Catalog
- When buying office supplies via Punch-Out
- When submitting Special requests
- When submitting ITD10, DAS-BID, TSR, or PSA/POS Requisition Types



Now we will talk about how you can navigate to creating a new requisition:

To Create a New Requisition:

1. Navigate to **Employee Self Service**
2. Select **Core-CT Financials** from dropdown menu.
3. Click **eProcurement** Tile.
4. Click **Create Requisition** Tile.



Requisition Defaults

The Requisition Defaults page is where you fill in your preferences for Header, Line, Shipping, and Distribution Defaults.

•At this point you can enter the Buyer, The Ship To, Due Date, and the Chartfield Coding which will be applied to each line of your requisition. If ordering from the Catalog, or doing a Punchout order, there is no need to enter the Vendor, Vendor Location, Category or Unit of Measure as they will default in with your item. The Account Code will also populate in the Chartfields1 Section if ordering from the Catalog (or Punchout), and will override any different value you enter in the defaults.

•The Distribution Chartfields are now displayed in 3 separate tabs (Chartfields 1, 2 and 3).

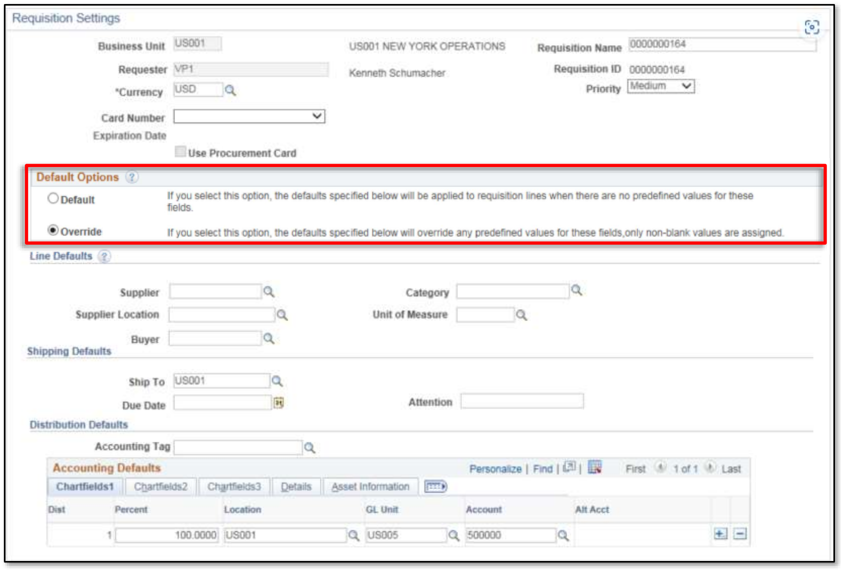
•Use the Show All Columns icon to display all the fields in the Accounting Defaults on the same page.

•If the items are Inventory items, click on the Details tab to enter your IN-Business Unit.

•If the items are Assets, click on the Asset Information tab and enter your AM Business unit and your Profile ID.

Unit 1, Part 1: Define Requisition

Requisition Defaults



Please note: The **Default Options** box has been removed from the Requisition Defaults page. This functionality is now managed through **Mass Change**, which we will cover later in this course.

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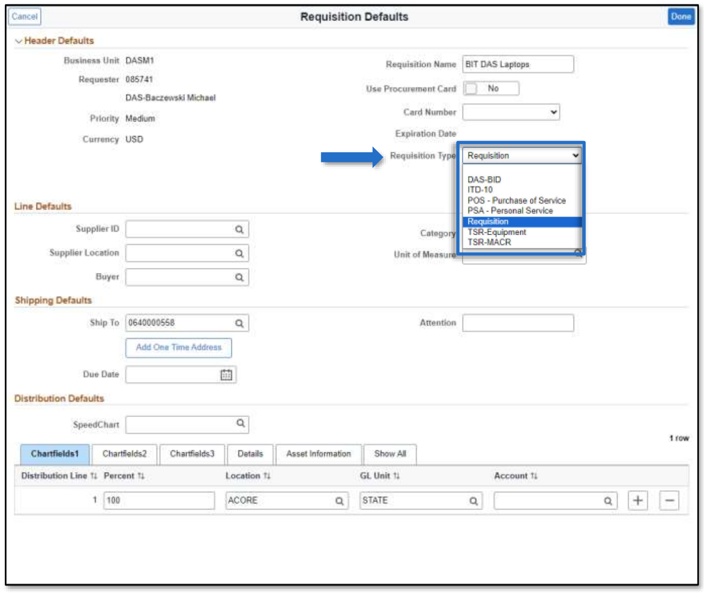
Note that the Default options box previously found in between the Header and Line defaults has been removed. This is now managed through the Mass Change link, which will be covered later.

Requisition Types

The user must select the appropriate **Requisition Type**. Once a requisition is Saved, the requisition type cannot be changed. As an example, lets select **Requisition**.



Job Aids:

- Types_of_Requisitions_DAS_BID.docx
- BITS-Funded_Assets_ITD-10_Requisition_Job-Aid.docx
- BITS-Funded_Assets_ITD-10_Requisition_Job-Aid.docx
- PSA_POS_Requisition.docx
- Types_of_Requisitions_Requisition.docx
- Types of Requisitions TSR EQUIP.docx
- Types_of_Requisitions_TSR_MACR.docx

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It is important to select the correct Requisition type at this stage. Once a requisition is saved or submitted, the req type cannot be modified. On the left, you will find hyperlinks to the various job aids for the different requisition types.

Requisition Types

Requisition Types	Definition
ITD-10	Purchasing IT (Information Technology) Items or Services.
DAS-BID	Requisition used to initiate the start of a Bid for a procurement that is not on contract or replaces an expiring contract.
TSR-MACR	Telecommunications, Moves, Adds, Changes, and Repairs.
TSR-EQUIP	Telecommunications Equipment.
PSA See CGS (4-212 (2) and (3)) - Chapter 55a (Subject to change)	Personal Service Agreement, is a formal contract with a personal service contractor. This contractor, whether an individual, firm, or corporation, is engaged by an agency to provide services in exchange for a fee. The PSA outlines the specific services or end product that the contractor is obligated to deliver to the agency.
POS See CGS POS (4-70b (a)1) - Chapter 50 (Subject to change)	A Purchase of Service Contract is a formal agreement between a state agency and an organization for the acquisition of direct human services provided to clients.
Reqs.	Reqs. Covers most requisitions not mentioned in the above types.

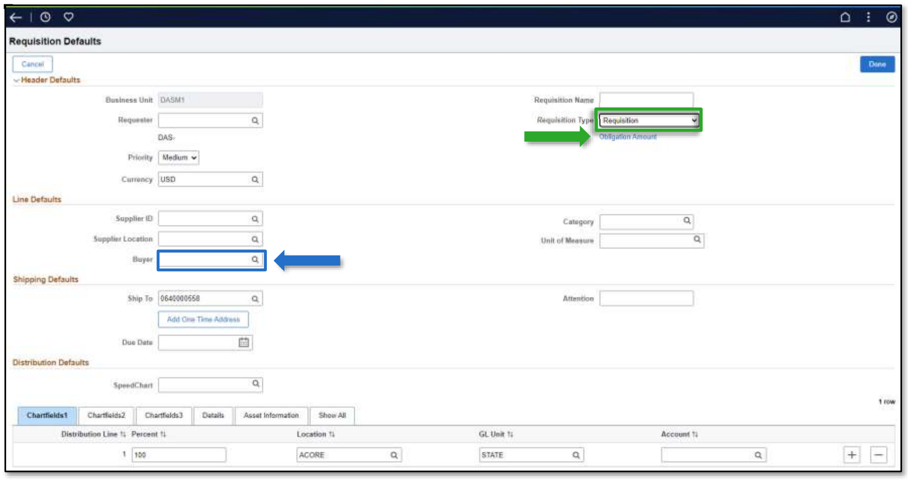
Here are the different types of requisitions:

- ITD-10 which is for purchasing IT items or services.
- DAS-BID are used to initiate the start of a bid that is not on contract or replaces an expiring contract.
- TSR-MACR are for Telecommunication, Moves, Adds, Changes, and Repairs.
- TSR-Equip are for telecommunications equipment.
- PSA are Personal Service Agreements.
- POS is a Purchase of Service Contract.
- Reqs covers most other requisitions.

Requisition Types

Depending on the **Requisition Type** selected, a hyperlink displays under the selection. The hyperlink opens to custom pages that also **require input**.

Each requisition should have one **Buyer**.



Defining_Requisition_Obligations.pdf.docx

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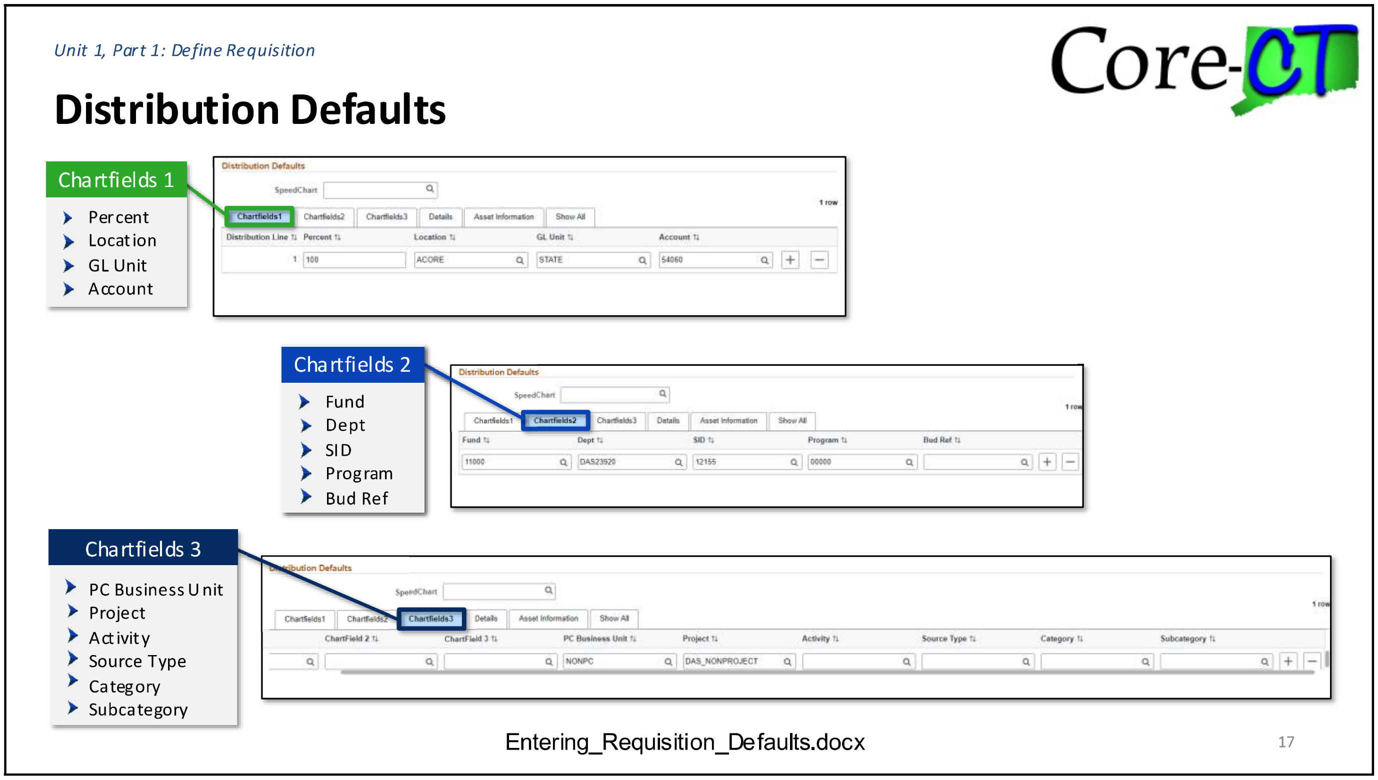
Each Requisition type has a distinct hyperlink that appears below the dropdown menu, directing you to custom pages that also require input. On this example, the Req Type is Requisition, which prompts the Obligation Amount hyperlink; the link opens to a page where values are required for certain fields.

Reminder: each requisition should have one designated buyer. If the requester is NOT also the buyer, one needs to be entered on the req defaults.

At the bottom, there is a hyperlink to the 'Defining Requisition Obligations' job aid.



Here, you will find Distribution Defaults and ChartFields 1, 2, and 3.

•**ChartField 1** includes the following fields: Percent, Location, GL Unit, and Account.

•**ChartField 2** contains: Fund, Department, SID, Program, and Budget Reference.

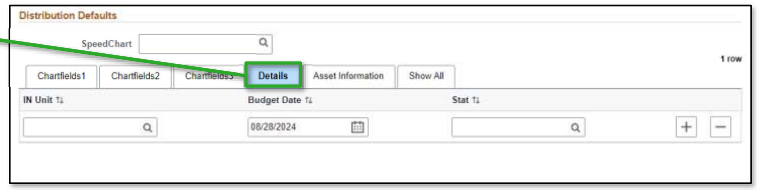
•**ChartField 3** features: PC Business Unit, Project, Activity, Source Type, Category, and Subcategory.

At the bottom, you'll find a hyperlink to the Entering Requisition Defaults' job aid.

Distribution Defaults (cont'd)

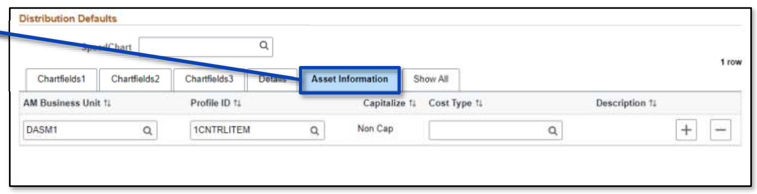
Details

- IN Unit
- Budget Date
- Stat



Asset Information

- AM Business Unit
- Profile ID
- Capitalize
- Cost Type
- Description



Entering_Requisition_Defaults.docx

The **Details** tab includes fields for Inventory Unit, Budget Date, and Stat.

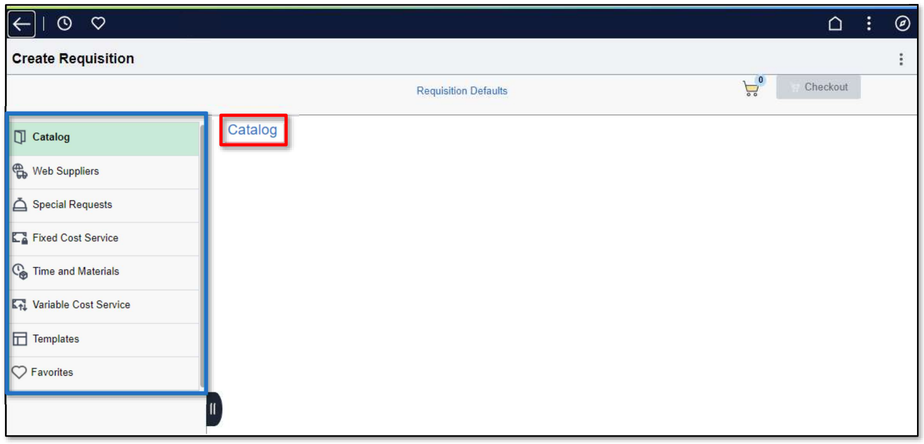
The **Asset Information** tab contains fields for Asset Management Business Unit, Profile ID, Capitalize, Cost Type, and Description.

At the bottom of the page, there is a hyperlink to the 'Entering Requisition Defaults' job aid.

Create Requisition

View the **Navigation Collection** on the left side of the **Create Requisition** Page. The following options are available:

01 Catalog
02 Web Suppliers
03 Special Requests
04 Fixed Cost Service
05 Time and Materials
06 Variable Cost Service
07 Templates
08 Favorites



View the Navigation Collection on the left side of the **Create Requisition** Page where you see the following options:

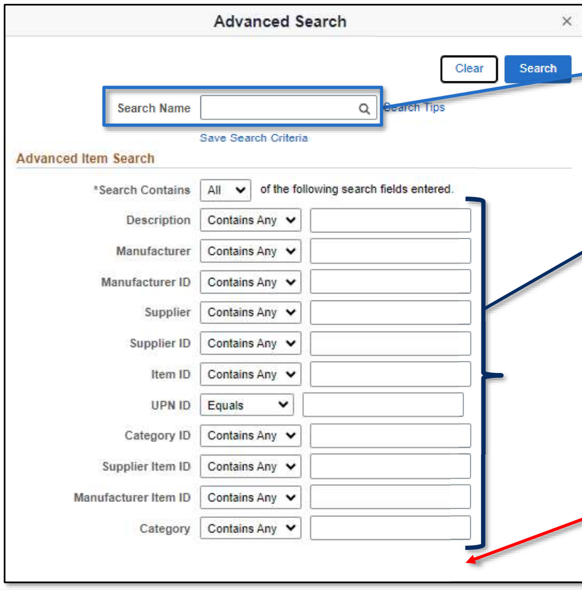
- Catalog
- Web Suppliers
- Special Requests
- Fixed Cost Service
- Time and Materials
- Variable Cost Service
- Templates
- Favorites

Unit 1, Part 2: Add Items & Services

Core-CT

Catalog: Catalog Search

Use **Advanced Item Search** for precise catalog item results by providing detailed information.



Avoid using the Search Name function

Use the **Advanced Item Search** to search for catalog items. Enter as much information available to narrow the search results and find the exact items to order.

Please Note: Oracle has removed the "Search by Contract ID" Field, previously located at the bottom of the Search page.

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When you click **Catalog**, you will be directed to the search page.

The more information provided, the more refined the search results will be.

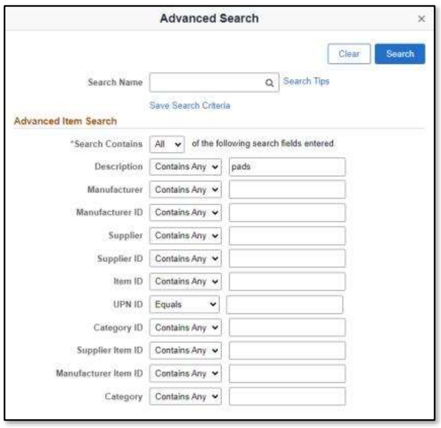
Avoid using the **Search Name** field.

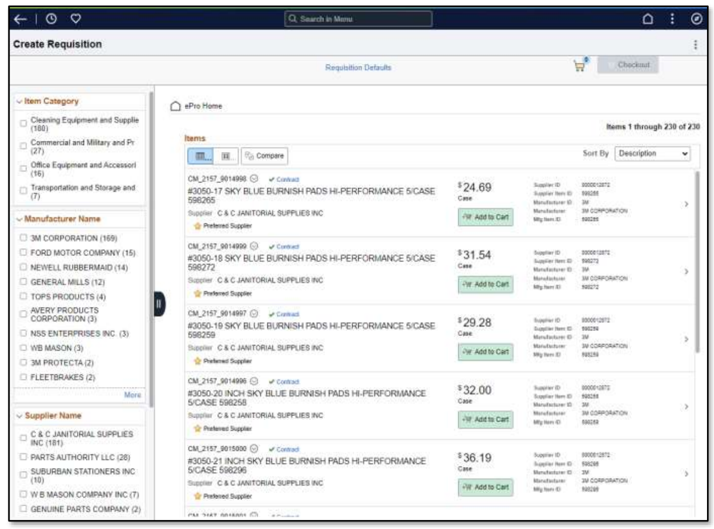
Please note that Oracle has removed the **Search by Contract ID** field.

To search by the CM #, or Item ID, enter the last set of digits between the % wildcard. Ex: to get results for CM_2157_9014998, only enter %9014998%

Catalog: Catalog Search

Enter desired search criteria and click **Search**.





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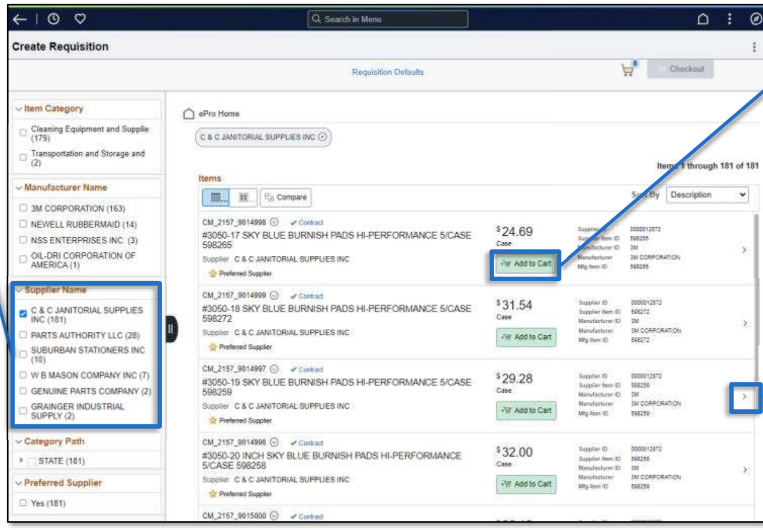
This is the **Advanced Search** page, with 'pads' entered in the description field, displaying a search result of all catalog items containing 'pads' in their descriptions.

Unit 1, Part 2: Add Items & Services

Catalog

Using the **catalog search results**, you have the option to add items to your cart or view its details.

Remember to only select **Single Supplier Requisitions**.



Click **Add to Cart** to add an item to the shopping cart.

Click the **Arrow** to show item details.

Adding Items to a Req using Search.docx

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The left panel displays filters where a single supplier can be selected to show all results for that supplier

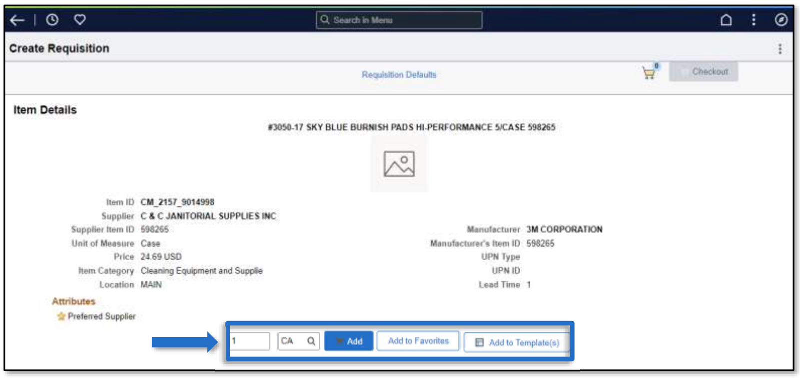
Click the arrow to view item details, and click **Add to Cart** to include items in the shopping cart.

Remember to follow the policy of one supplier, one buyer, and one Requisition per Purchase Order.

At the bottom is the hyperlink to the Adding Items to a Requisition using Search job aid.

Catalog: Item Details

The **Item Details** page provides information about the selected item and allows you to enter additional information such as the **quantity** of the item, **add** to your cart, **add to your favorites**, and **add to templates**.



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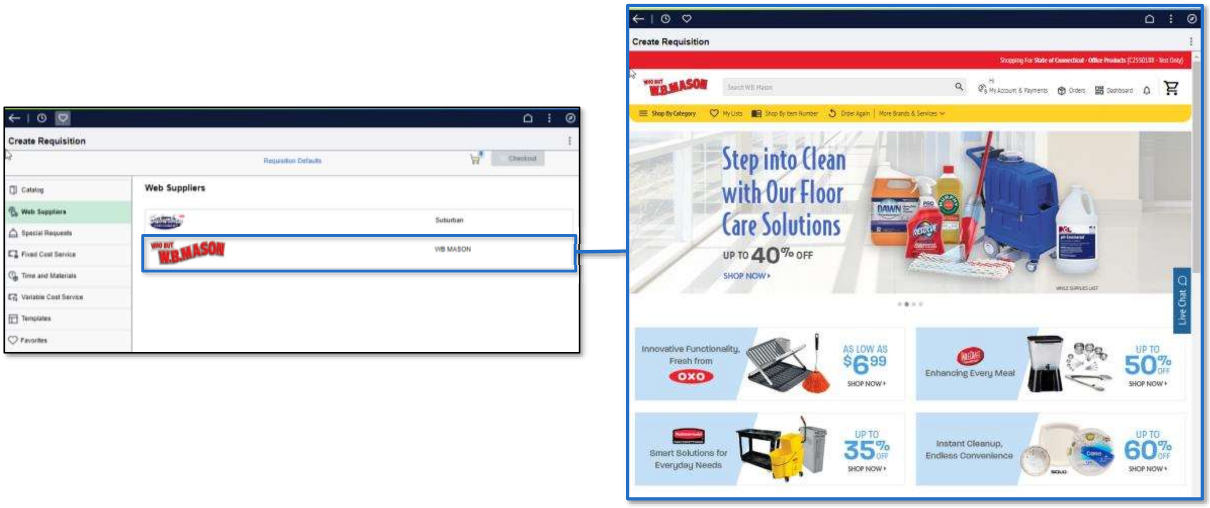
The **Item Details** page includes a long description of the item, which can help determine if it is the correct item to request. The **Item ID** represents the Catalog Management number.

For any questions about contract pricing in the catalog, contact a Contract Specialist at DAS Procurement.

Enter the desired quantity, then click the **Add** button to include items in your shopping cart. With the new **Persistent Cart Functionality**, you can add items to your cart, and return later to complete your purchase.

Web Suppliers

To purchase an item through a web supplier, navigate to the **Web Suppliers** tab and click on a punchout supplier. Then use the supplier's site to search for an item, choose your quantity, and add it to your cart.



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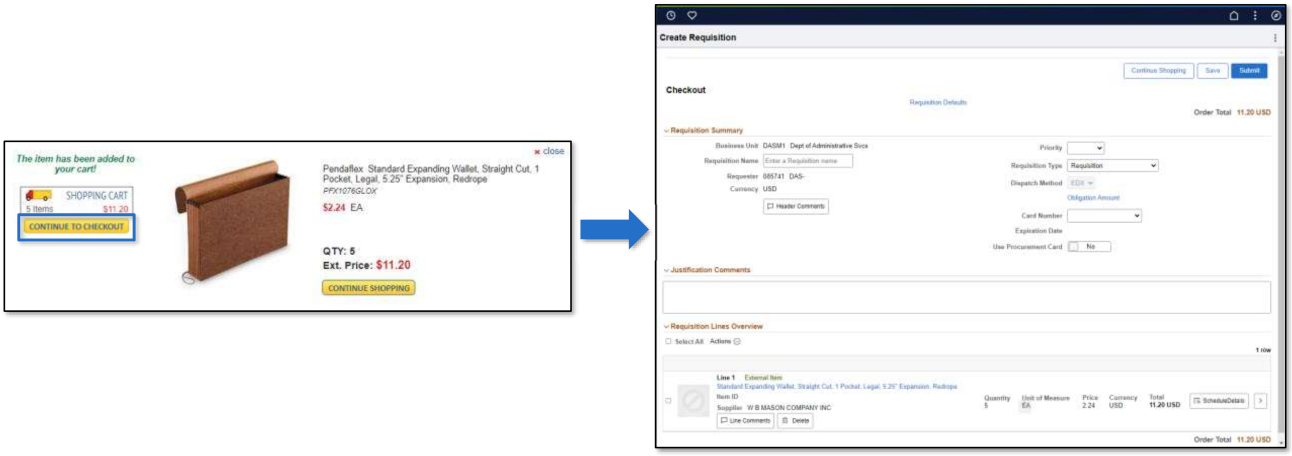
To purchase an item from a web supplier, navigate to **Web Suppliers** and select a one of the punchout suppliers. You can then use the supplier's site to search for items and add them to your cart.

Unit 1, Part 2: Add Items & Services

Web Suppliers (cont'd)

Clicking **Continue to Checkout** on the **Web Supplier's** site brings the user back to the **Fluid Checkout** page.



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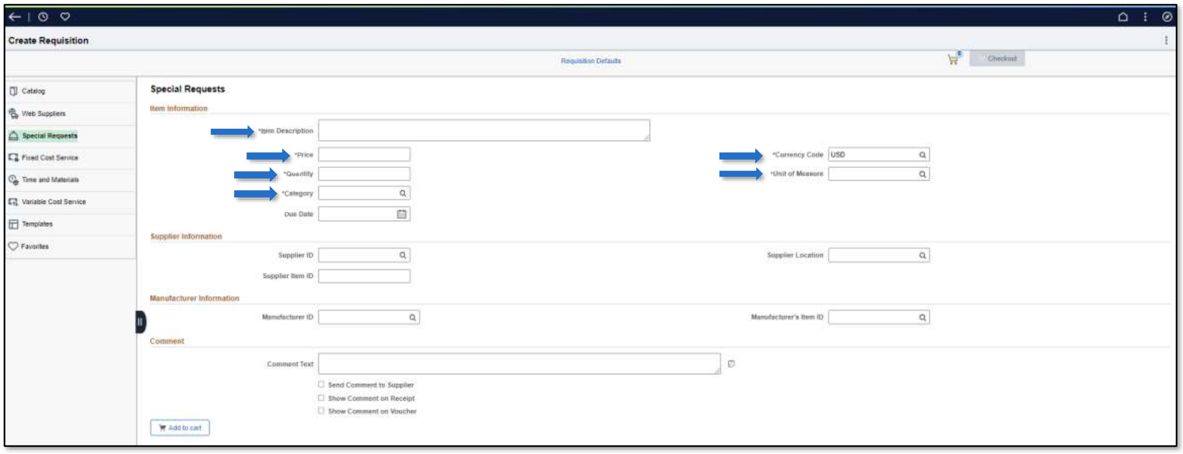
Clicking "Continue to Checkout" on the supplier's site redirects you back to the Fluid Checkout page.

Special Requests

To add items that are not in the Catalog, use the **Special Request** tab to describe/add goods to the requisition. Please note the required fields are marked with an asterisk.



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Special Requests

•Navigate to the Special Request tab to add items not listed in the Catalog.

•Use the Special Request page to describe and include goods in the requisition.

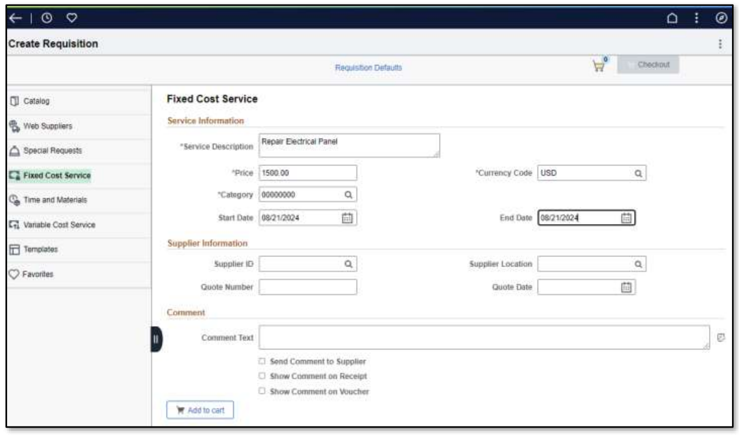
•Some fields are mandatory (marked with asterisks), such as the Supplier ID, which is crucial for accurate processing.

•You can choose to share Additional Information with the supplier, which will be visible on the purchase order or receipt pages.

Fixed Cost Service

Use the **Fixed Cost Service** page to request **a onetime service for a flat fee.**

Example: A contractor is hired to repair electrical panel. The contractor will complete all necessary repairs for the price of $1500.



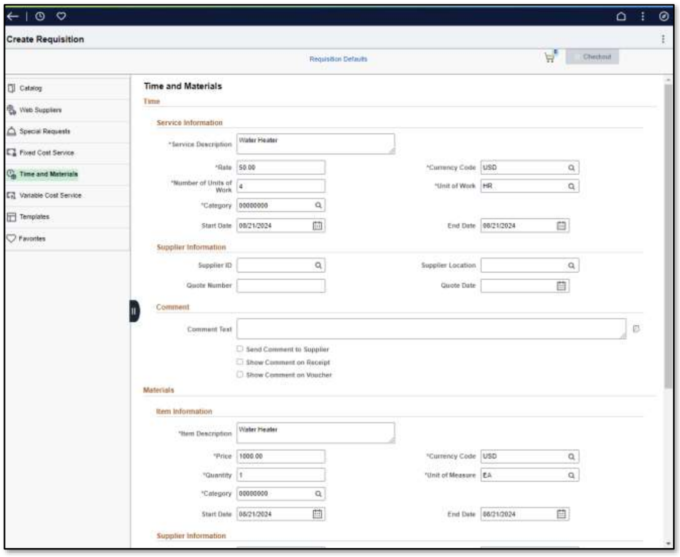
Fixed Cost Service

•Use the Fixed Cost Service page to request a one-time service for a flat fee.

•**Example**: A contractor is hired to repair an electrical panel, completing all necessary repairs for a total price of $1,500.

Time and Materials

Request a service for which **the fee is based on the time worked and there is a cost for materials**.



Example: A plumber is hired to repair a broken water heater at an agency. The plumber will complete the repair at the rate of $50 per hour. The job is expected to take 4 hours. A new part is needed to make the repair at a cost of $75.

Time and Materials

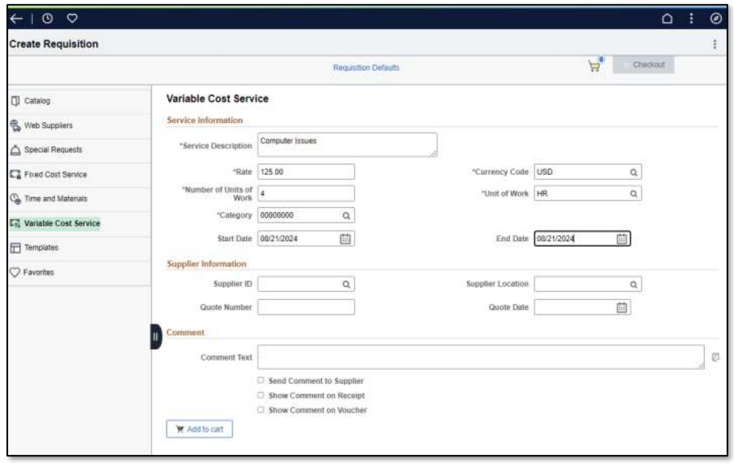
•Use the Time & Materials link to request a service where the fee is based on the time worked and includes costs for materials.

•**Example**: A plumber is hired to repair a broken water heater at an agency. The plumber charges $50 per hour, with the job expected to take 4 hours. Additionally, a new part costing $75 is required for the repair.

Variable Cost Service

Variable Cost Service tab is where **the amount of time to make the repair or service is unknown** and there are **no materials required**

Example: Troubleshooting computer issues @ a cost of $125/hr. not knowing how many hours it may take.



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Variable Cost Service

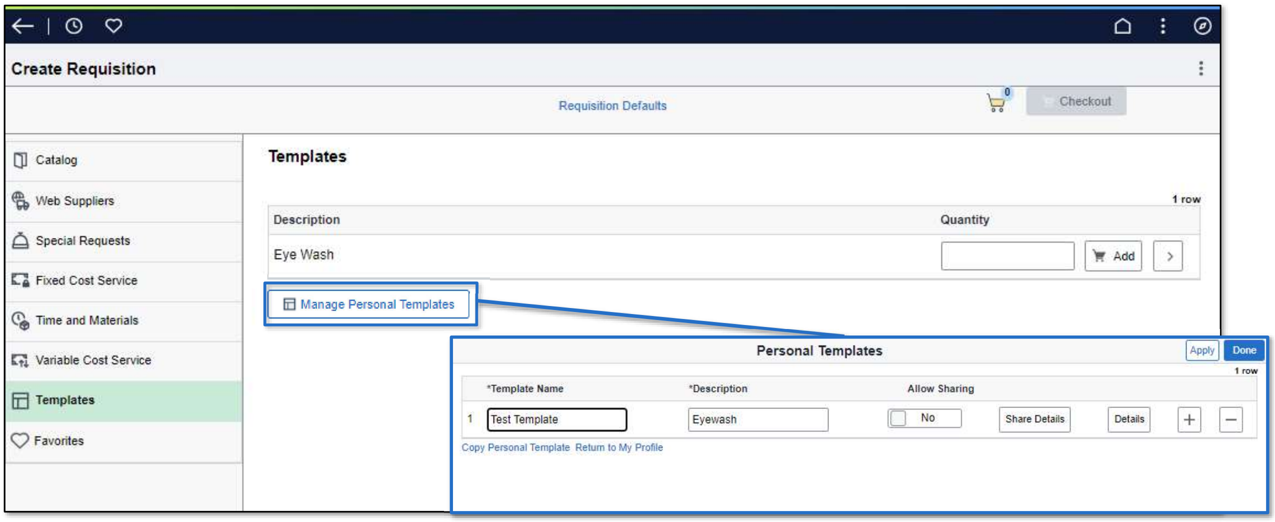
•Variable Cost Service applies when the time required to complete the repair or service is unknown.

•No materials are needed, and the total cost is unknown.

•**Example**: Troubleshooting computer issues at a rate of $125 per hour.

Templates

Add a template to a requisition by selecting it and clicking "Add" on the **Templates** tab.



Add,Delete,Share Templates (Create Requisition).docx

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Templates

•Use the "Add to Template(s)" button to save requisition lines for future use.

•Select the line(s), click "Add to Template," and choose an existing template or create a new one.

•Access templates from the Templates tab on the Create Requisition page.

•To add a template to a requisition, select it and click "Add" on the Template Tab.

•Pricing will update automatically with new Catalog requisitions.

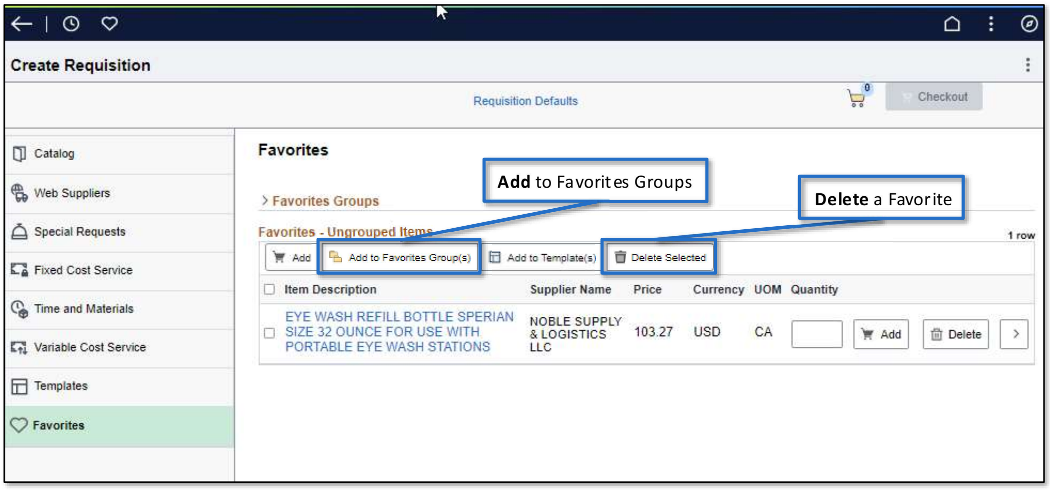
•Inactive items will not be available for checkout.

•To delete templates, click "Manage Personal Templates," select the template, click the minus sign "-", confirm the deletion, and then click "Done."

•A hyperlink to the Add/Delete/Share Templates job aid is available at the bottom of this slide.

Favorites

Add frequently purchased items to the **Favorites** tab to simplify future requisitions.



Adding Favorites to Favorite Groups (CreateRequisition).docx

Favorites

•Add frequently purchased items to Favorites for easier future requisitions.

•To add an item to Favorites, click "Add to Favorites" and confirm by clicking the "Done" button.

•**To delete a Favorite**: Go to the Favorites Tab, click "Delete," and confirm the deletion.

•To add a Favorite item to a requisition, edit the quantity and click "Add."

•Group Favorite items by selecting checkboxes, clicking "Add to Favorites Group(s)," and providing a name and description for the group.

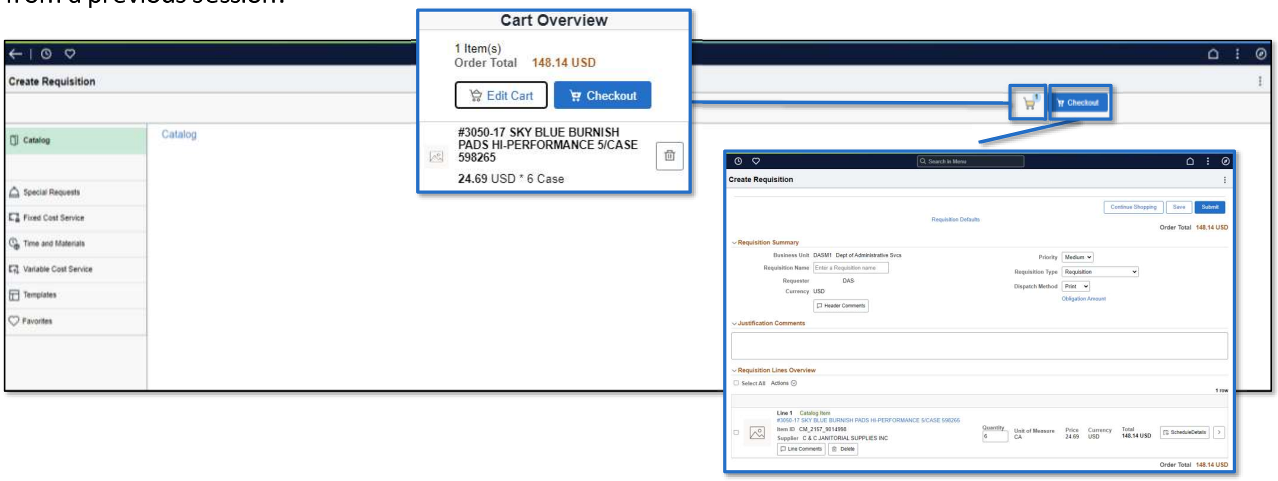
•An exclamation icon indicates inactive items, with a hover-over message for more details.

•Pricing on Favorites automatically updates with each new Catalog pricing.

•A hyperlink to the Adding Favorites to Groups job aid is available at the bottom.

Shopping Cart

Click the **Shopping Cart** icon for the **Cart Overview**. The Cart stays active, updating as you add items. Always click the shopping cart icon before adding items to a new req to ensure there are no unneeded items left from a previous session.



Shopping Cart

•Click "Shopping Cart" for an overview of your cart.

•The cart remains active, updating as you add items.

•Take advantage of the Persistent Cart Functionality to save your progress in between sessions and return later to complete/save your order.

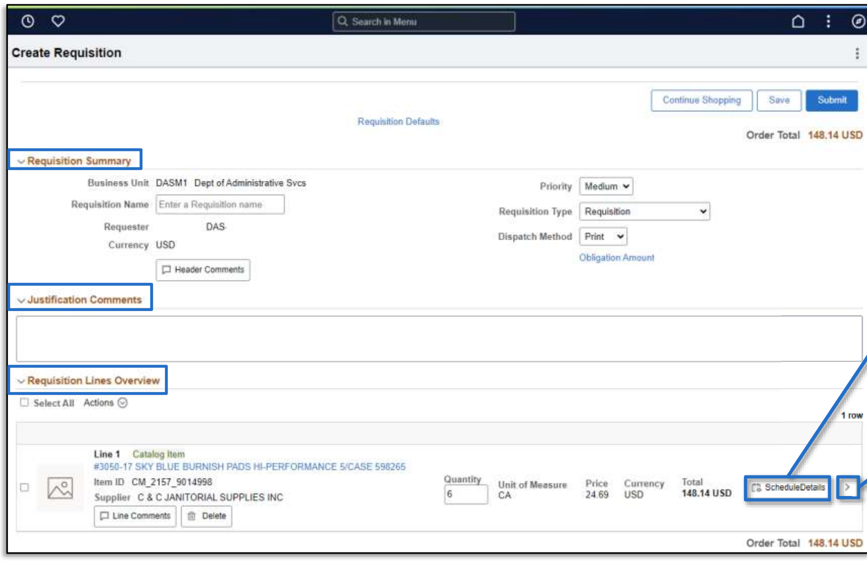
•Even if the cart icon shows a zero, always click it to check for any unneeded items left from a previous session or requisition (this is a known Oracle bug).

•Select the Checkout button to bring up the Requisition details

Unit 1, Part 3: Review and Submit

Checkout

Select the **Checkout** button to bring up your **Requisition Summary**, **Justification Comments** field, and **Requisition Lines Overview**.



Clicking the **Schedule Details** button brings you to the **Schedule Details** page.

Clicking the **>** brings you to the **Line Details** page.

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Review

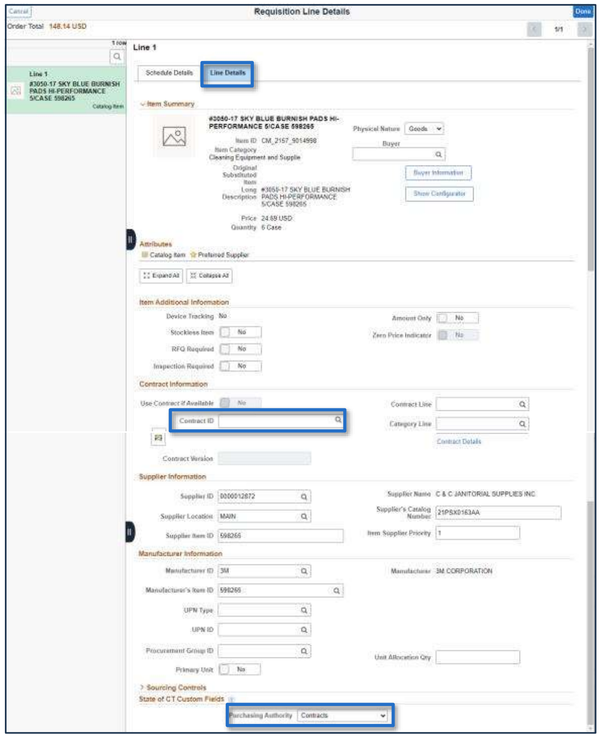
- Select the "Checkout" button to access your "Requisition Summary," "Justification Comments" field, and "Requisition Lines Overview."
- The lines added to the requisition will display in the "Requisition Lines Overview" box.
- Clicking the arrow will expand each line for review and editing.
- Clicking the Schedule Details button brings you to the Schedule Details Page, including Distributions.

Line Details

Purchasing Authority defaults to Contracts

The Contract ID will default on Catalog items and Punchout requisitions but must be entered for Special Requests that have a purchasing authority of Contracts.

The requisition cannot be saved without a Contract ID if the purchasing authority is Contracts.



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Line Details

•Click the **Line Details** tab to access the Line Details page.

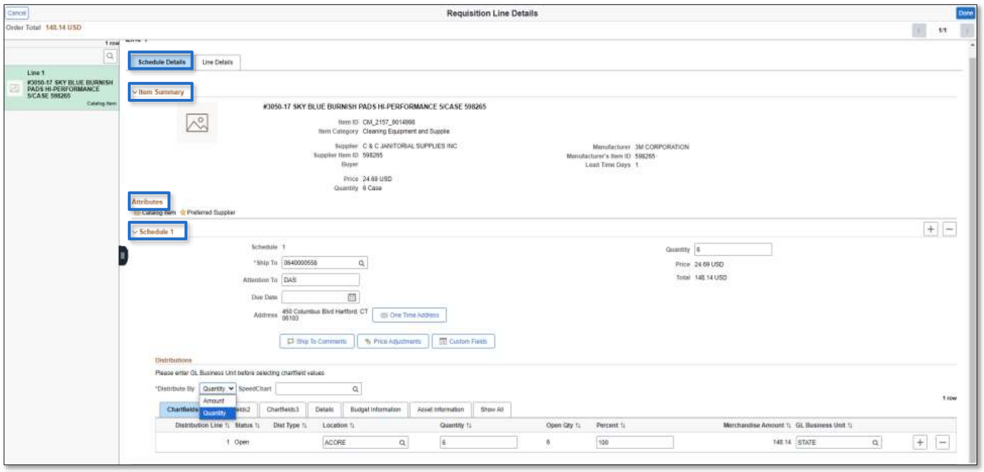
•All information on this page defaults automatically.

•The Purchasing Authority defaults to Contracts.

•The Contract ID will automatically populate for Catalog and Punchout orders, but it must be entered for other Reqs with a Purchasing Authority of Contract.

Schedule Details

- Used to manage and track the delivery schedules of requisition line items.
- Specify important details such as **delivery dates**, **quantities**, and **locations** for ordered goods or services.
- The page also provides access to Distributions ChartFields.



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Schedule Details

•Select the **Schedule Details** tab to access detailed schedule information.

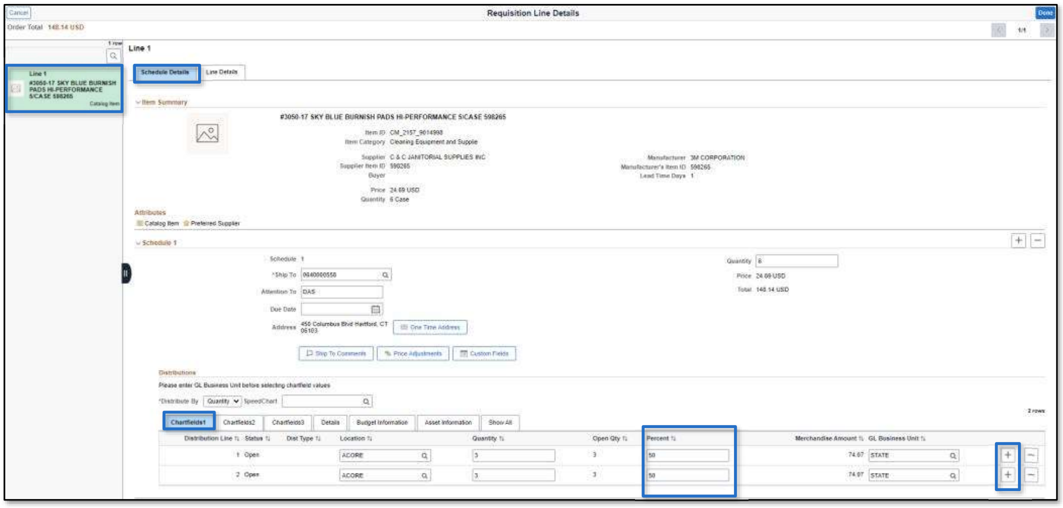
•This section provides a comprehensive item summary used to manage and track the delivery schedules of requisition line items.

•Specify important details such as delivery dates, quantities, and locations for the ordered goods or services.

•The Schedule Details tab also offers access to the Distributions ChartFields.

Split Funding

To split the funding for this line, click the **+** sign to add another distribution row under the distributions drop down.



ePro Split Funding.docx

Split Funding

•Click the arrow to expand the line for editing.

•Navigate to the **Schedule Details** tab.

•Click the **Distributions** dropdown to expand and display the Accounting Lines.

•To split the funding for the line, click the **+** sign to add another distribution row.

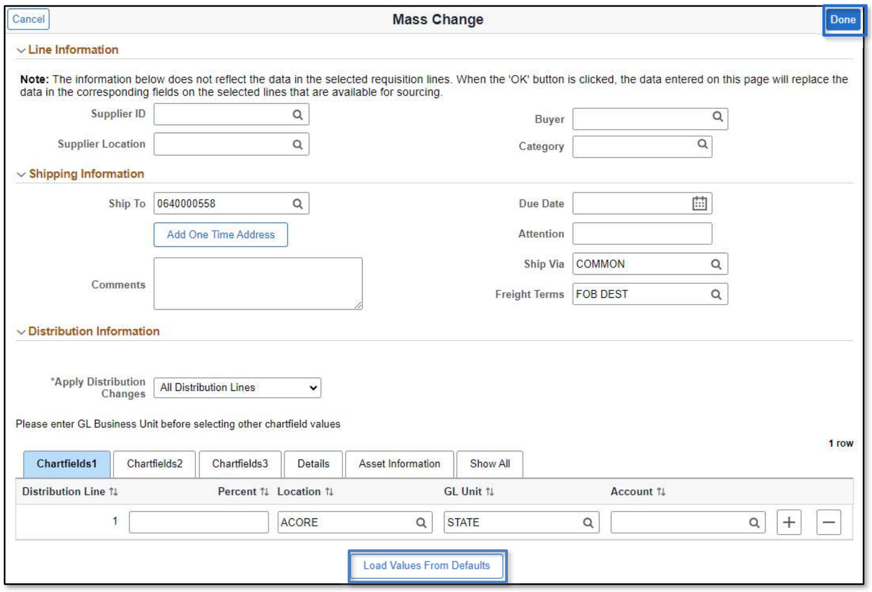
•Enter the additional ChartField information, ensuring to adjust the percent field to reflect the correct value for each line.

•A hyperlink to the ePro Split Funding job aid is available at the bottom.

Unit 1, Part 3: Review and Submit

Mass Change

- The **Default Options** box has been removed from the **Requisition Defaults** page. This functionality is now handled through **Mass Change**.
- **Load Values From Defaults** fills in fields with information from the Requisition Defaults.
- The changes made to the fields on the **Mass Change** page will override the **Requisition Defaults.**



Using the Mass Change Link.dox

37

Mass Change

•The **Default Options** box has been removed from the **Requisition Defaults** page. This functionality is now handled through **Mass Change**.

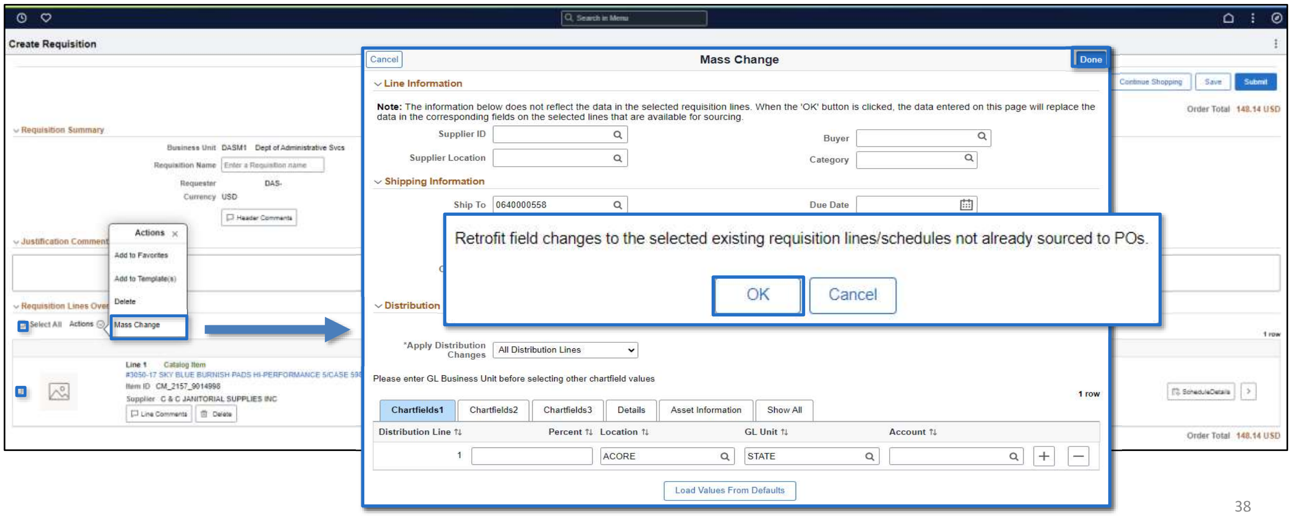
•The **Load Values From Defaults** option populates fields with information from the Requisition Defaults.

•Changes made to fields on the Mass Change page will override the Requisition Defaults.

•A hyperlink to the **Using the Mass Change Link** job aid is available at the bottom.

Mass Change

To edit **multiple lines on a requisition**, select the desired lines by checking the boxes in front of the lines or the Select All check box and click **Mass Change** from the **Actions** drop down menu.



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Mass Change

•To edit multiple lines on a requisition, select the desired lines by checking the boxes in front of each line or use the **Select All** checkbox.

•Click the **Actions** dropdown and select **Mass Change**.

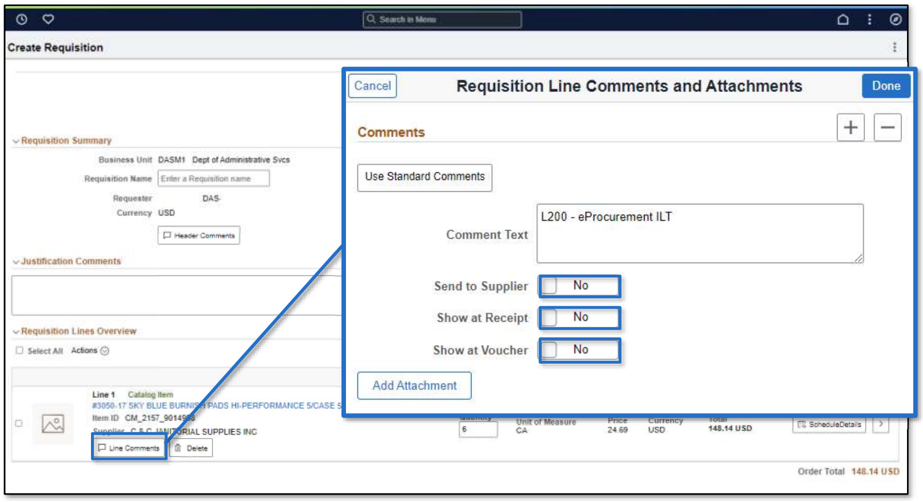
•On the **Mass Change** page, click the **Load Values From Defaults** link to view the current chartfields from the Req Defaults page.

•Edit the fields as needed, and click the **Done** button when finished.

•A pop-up window will appear, asking if you want to "Retrofit field changes to the selected requisition lines/schedules not already sourced to POs." Click **OK**.

Line Comments and Attachments

Click the **Line Comments** icon to add comments for a particular *line*. The line comments can be directed to the Supplier and display on the purchase order; display on the Receiving pages; or display on the Voucher pages. Select the appropriate checkbox(es).



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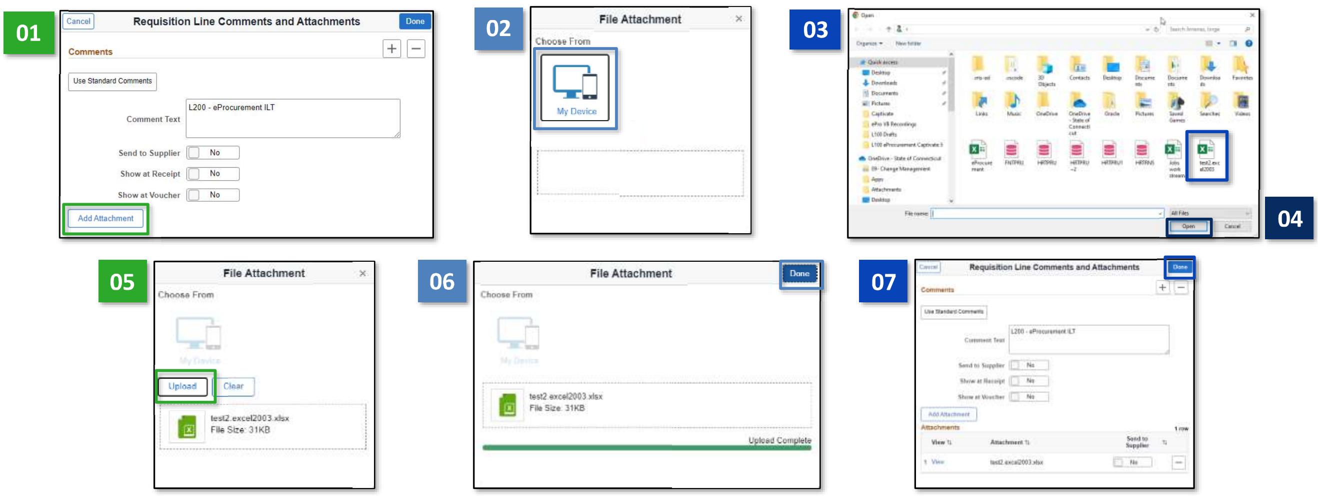
Line Comments

- Click the **Line Comments** icon to open the Line Comments and Attachments for a specific line.
- Line comments can be directed to the Supplier and will display on the purchase order, receiving pages, or

voucher pages accordingly. Select the appropriate checkbox(es)

Line Comments and Attachments

In **Line Comments and Attachments,** the user can **Add Attachments** to the Requisition.



Comments_and_Attachments.docx

In the Line Comments and Attachments page, users can also add attachments that allow requesters to communicate supplemental information and requirements to suppliers, approvers, and other Core-CT users, and are always tied to the requisition.

Use the **Add Attachments** button to include supporting documentation with the requisition.

1. Click the **Add Attachment** button.
2. Click the **My Device** button.
3. Select the file you wish to attach.
4. Click **Open**.
5. Click **Upload**.
6. Once the file is uploaded, Click **Done**.
7. Click **Done** again once all attachments are added.

- Attachments are permanently associated with requisitions, and once sourced, they carry over to the purchase order. Attachments will be sent to the supplier when the **Send to Supplier** box is checked and the PO is dispatched via email.
- At the bottom, there is a hyperlink to the **Comments and Attachments** job aid.

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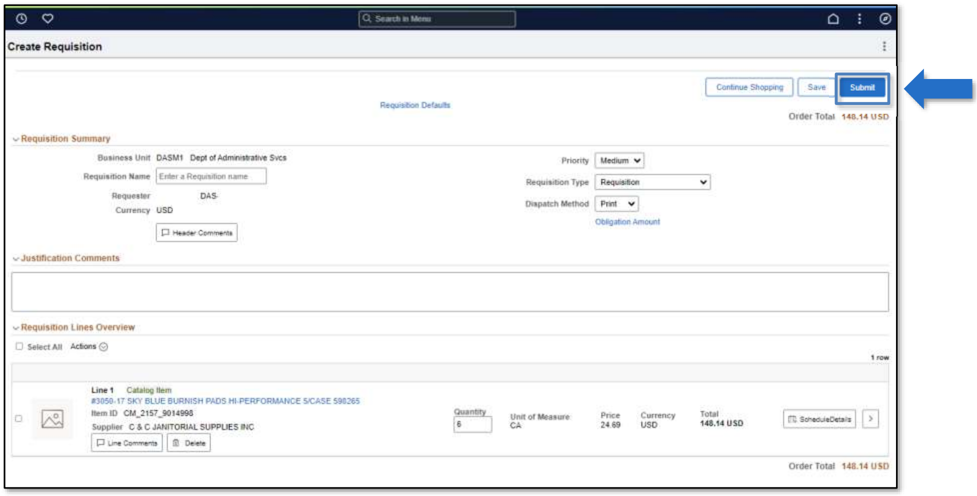
Save and Submit

The **Submit** button saves the requisition and initiates workflow. The Confirmation page will display. The **Save** button will save the requisition without initiating workflow. The system will assign a Requisition ID but will not display the Confirmation page.



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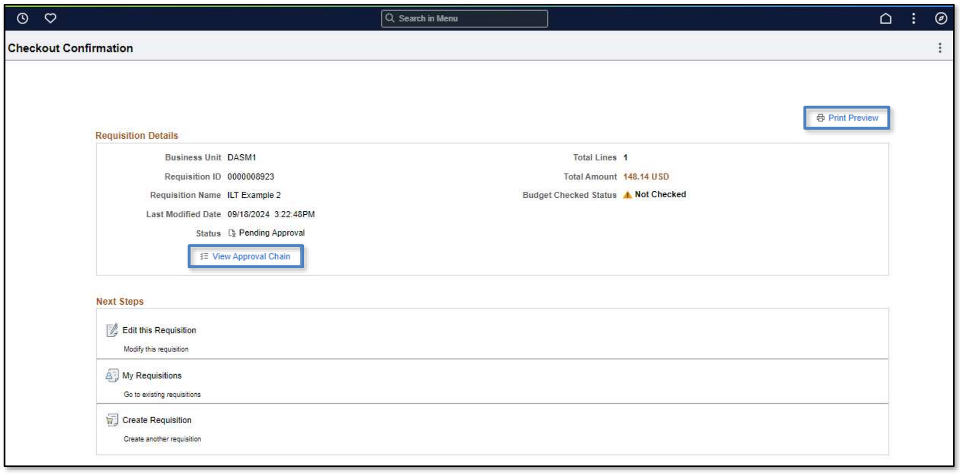
Save and Submit

•The **Submit** button saves the requisition and initiates the workflow. A Confirmation page will display, and the requisition will be routed to the Req Amount Approver 1's approvals list.

- The **Save** button saves the requisition without initiating the workflow. The system will assign a Requisition ID, but the Confirmation page will not be generated/displayed.

Confirmation Page

The **Confirmation Page** displays after clicking the **submit** button. From this page you can **View Approval Chain** and view a **Print Preview**.



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Confirmation Page

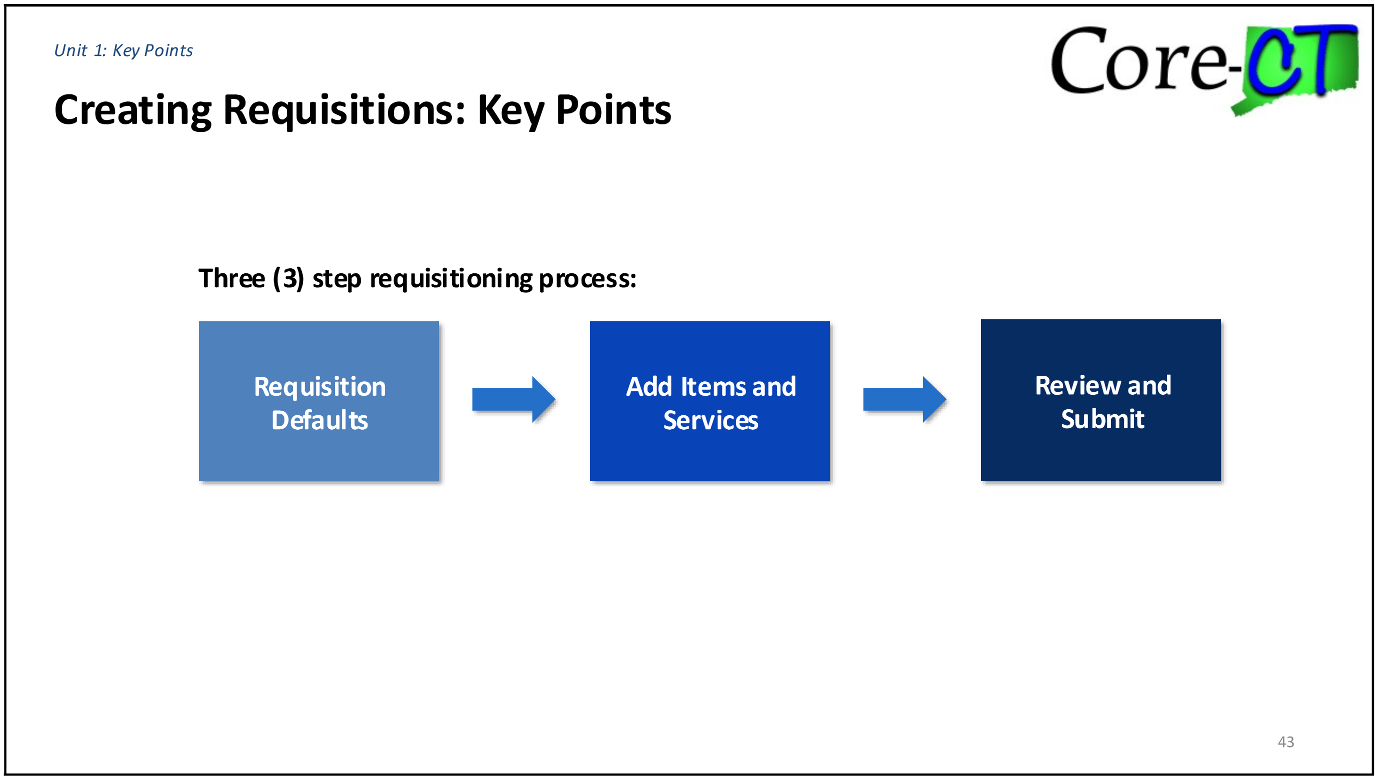
- The Confirmation page appears after clicking the **Submit** button.
- It displays summary requisition information, including the Requisition ID generated upon saving the requisition.
- Click the **View Approval Chain**

button to see the approval status path with the approvers in the workflow.

•Click the **Print Preview** button to view a printable version of the requisition (Note: The State of CT is intended to be paperless, so printing may not be necessary). A pop-up window will appear asking, “Do you want to print the requisition with distribution details?” Click **Yes** or **No** to proceed to the printable view.

•You can edit the requisition by clicking the **Edit Requisition** button.

•To return to the My Requisitions page, click **My Requisitions**.



Create Requisitions Key Points

Three (3) step requisitioning process:

1. Define Requisition
2. Add Items and Services
3. Review and Submit

Creating Requisitions: Key Points

Comments can be **routed to the vendor with the PO, display on the receipt, or display on the voucher**.

Attachments can be included and sent to the supplier with purchase orders dispatched through **email**.

You can **Split Funding** and assign **Distribution**.

The **Confirmation page provides summarized information** and lets you know the requisition has been submitted successfully.

You can save **requisition lines as Favorites** and/or **Templates** to create new requisitions. **Templates** can be shared.

Key Points Continued

•Comments can be routed to the vendor with the purchase order, displayed on the receipt, or shown on the voucher.

•Attachments can be included and sent to the supplier with purchase orders dispatch through email.

•The Confirmation page provides summarized information and confirms that the requisition has been saved successfully.

•You can save requisition lines as favorites and/or templates.

•Funding can be split, and distributions can be assigned accordingly.

Updated Job Aids

Job Aid Name	Job Aid Links
Requisition Type: Requisition	Types_of_Requisitions_Requisition.docx
Requisition Type: TSR Equipment	Types of Requisitions TSR EQUIP.docx
Requisition Type: DAS Bid	Types_of_Requisitions_DAS_BID.docx
Requisition Type: ITD-10	Types_of_Requisitions_ITD-101_Agency_Funded_IT_Purch.docx
Requisition Type: TSR MACR	Types_of_Requisitions_TSR_MACR.docx
Requisition Type: PSA/POS	PSA_POS_Requisition.docx
Entering Requisition Defaults	Entering_Requisition_Defaults.docx
Creating a TSR Requisition	Creating_TSR_Requisition_Job_Aid.docx

Here are all the job-aids associated with Creating a new requisition.

Updated Job Aids

Job Aid Name	Job Aid Links
Creating a Multiple Distribution Requisition	creating_multiple_distributions_req.docx
BITS-Funded Assets ITD-10 Requisition	BITS-Funded_Assets_ITD-10_Requisition_Job-Aid.docx
Adding Favorites to Favorite Groups (Create Requisition)	Adding Favorites to Favorite Groups (CreateRequisition).docx
Add/Delete/Share Templates (Create Requisition)	Add,Delete,Share Templates (Create Requisition).docx
Adding Items to a Requisition Using Search	Adding Items to a Req using Search.docx
Comments and Attachments	Comments_and_Attachments.docx
Defining Requisition Obligations	Defining_Requisition_Obligations.pdf.docx
ePro Split Funding	ePro Split Funding.docx
Using the Mass Change Link	Using the Mass Change Link.docx

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What Questions Are There?

- Post questions within the chat

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Are there any questions about what was discussed in **Unit 1: Creating Requisitions**? If you have any specific topics or points you'd like to revisit, feel free to ask!

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Unit 2: Manage Requisitions

In this unit, we'll explore how to manage existing requisitions, perform key tasks using the Fluid interface, and cover navigation changes.

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Manage Requisitions

In this unit, we will explore how to manage existing requisitions, perform key tasks using the fluid interface, and discuss navigation changes.

•**Managing Existing Requisitions**: Learn how to find, edit, and update requisitions as needed.

•**Key Tasks**: Familiarize yourself with essential actions in Manage Requisitions

•**Fluid Interface**: Understand how to navigate the updated interface for a more streamlined experience.

Unit 2: My Requisitions

Navigation to Manage Requisitions

01 Navigate to the **Employee Self Service** homepage.

02 Select **Core-CT Financials** from dropdown menu.

03 Click the **eProcurement** Tile.

04 Click the **Manage Requisitions** Tile.

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To access My requisitions using the fluid interface:

1. Go to **Employee Self Service**.

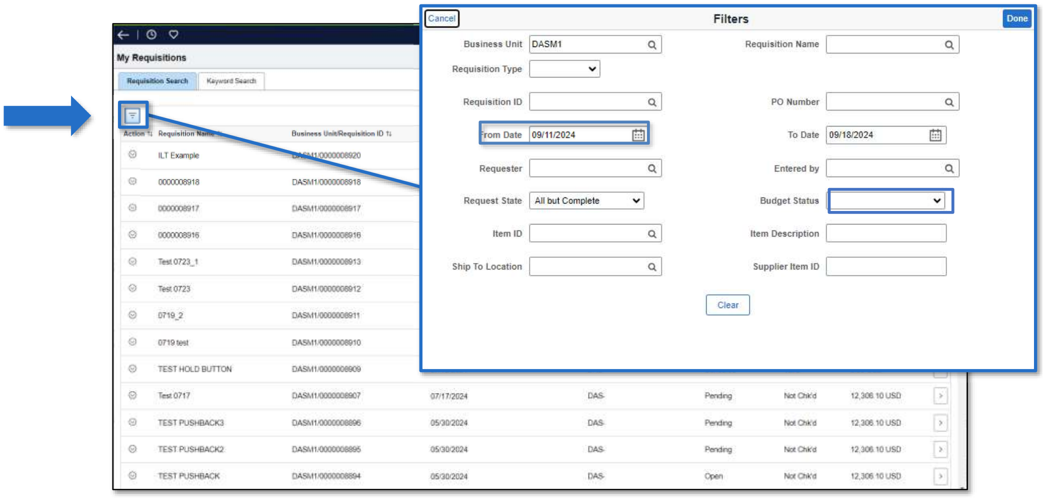
2. Select **Core-CT Financials** from the dropdown menu.

3. Click on the **eProcurement Tile**.

4. Click the **Manage Requisitions Tile**.

My Requisitions

The Manage Requisitions tile will default to **the My Requisitions** page, which contains the requisitions created by the user, for their default Business Unit, within the last seven days. Filters can be adjusted accordingly to expand or narrow your search results.



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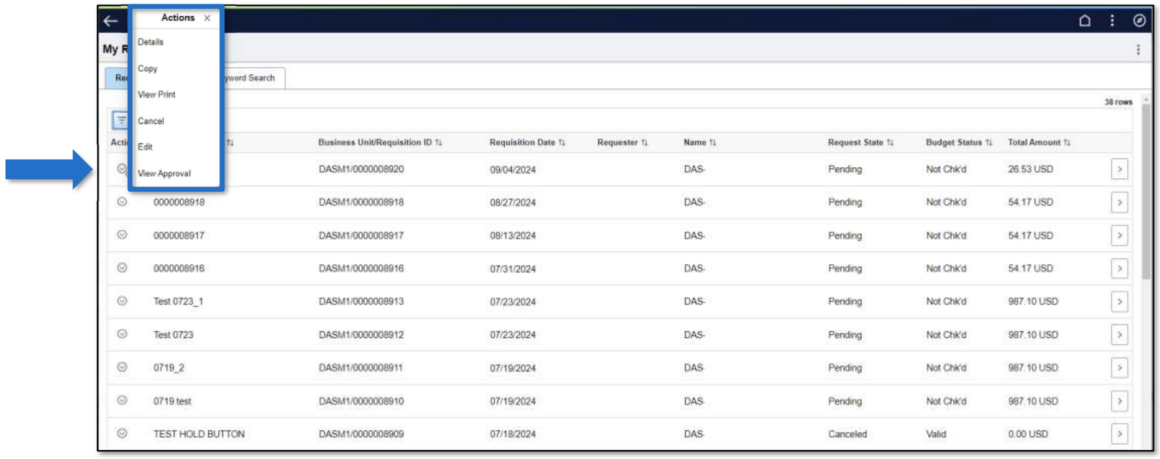
<u>My Requisitions</u>

- The Manage Requisitions tile will default to **the My Requisitions** page, which contains the requisitions created by the user, for their default Business Unit, within the last seven days.
- Click “Filters” button to edit the search criteria. The defaults are Business Unit and Requester. The Date From and Date To default to the previous week.
- The Requests Status defaults to All but Complete.
- Use any of the other filters to expand or narrow your search results.
- you also have the ability to search by Budget Status to bring up Reqs in budget error

Actions

Click the **Actions drop down** list to select an action for the requisition you are working on. Use the **Manage Requisitions** page once a requisition has been saved to **edit**, **cancel**, and **copy** requisitions. You can also view the Request Lifeline, **Approvals**, and a **Printable Version**.



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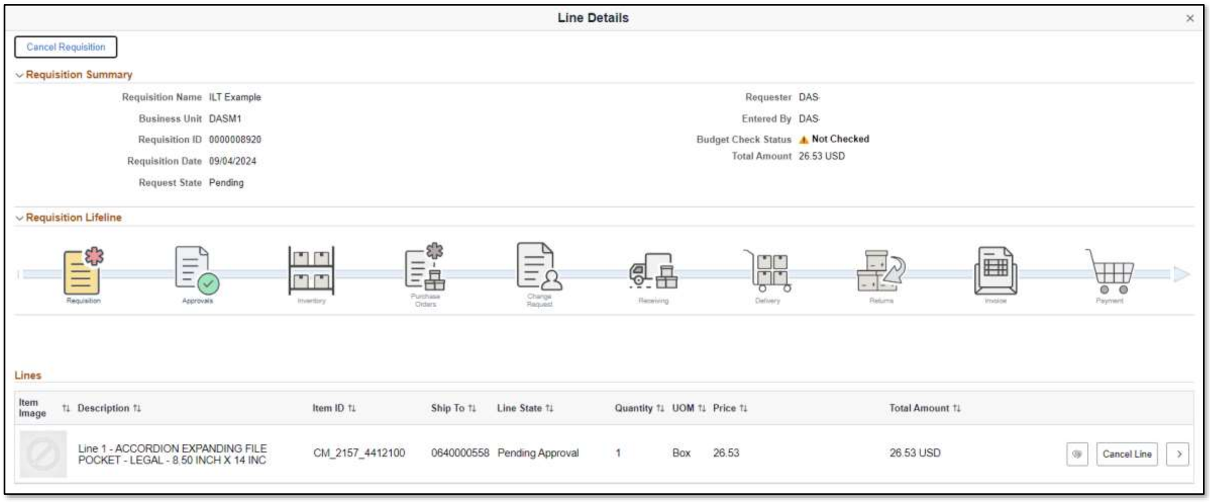
<u>Actions</u>

- Click the "Action" drop down list on the left to see the available options for a particular requisition depending on the roles that are assigned to your user ID by Security.
- The Actions that display are Details, Copy, View Print, Cancel, Edit, and View Approvals.

Details

The **Details** page displays a **Requisition Summary, Requisition Lifeline,** and the **Line** items of the Requisition.



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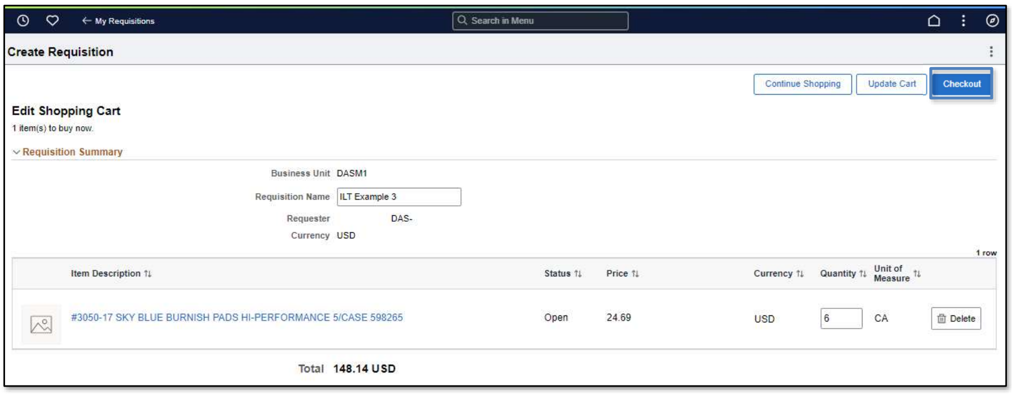
The **Details** page provides a **Requisition Summary**, a visual **Requisition Lifeline**, and a list of the **Line Items** included in the requisition.

Unit 2: My Requisitions

Copy

The **Copy** action allows users to quickly duplicate an existing requisition. Updates can be done on the **Checkout** page. Users can not copy **Punch Out** requisitions.



Copying an Existing Requisition.docx

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Copy Feature

This feature is especially helpful for creating new requisitions based on previous orders, saving time by replicating all line items, quantities, and other relevant details from the original requisition. Users can then modify any copied information as needed via the checkout page.

The req type defaults to Requisition on the new req, and the user must change it if necessary.

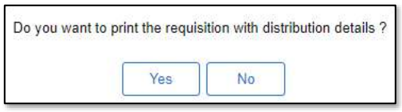
Please note that Punch-Out requisitions cannot be copied.

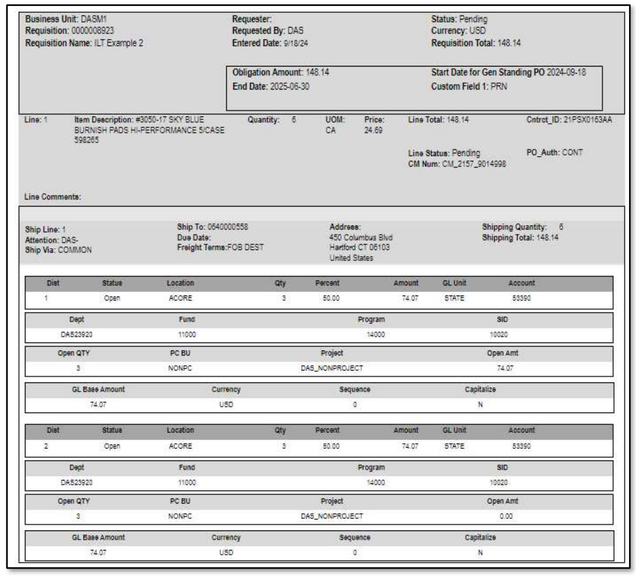
At the bottom, there is a hyperlink to the **Copy an Existing Requisition** job aid.

View Print

The **View Print** action will display a printable version of the requisition.

The User will be asked if they want it with or without the distribution details displayed.





Business Unit: DASM1
Requisition: 0000008923
Requisition Name: ILT Example 2

Requester:
Requested By: DAS
Entered Date: 9/18/24

Status: Pending
Currency: USD
Requisition Total: 148.14

Obligation Amount: 148.14
End Date: 2025-06-30
Start Date for Gen Standing PO 2024-09-18
Custom Field 1: PRN

Line: 1
Item Description: #3050-17 SKY BLUE BURNISH PADS HI-PERFORMANCE 5/CASE 598265
Quantity: 6
UOM: CA
Price: 24.69
Line Total: 148.14
Cntrct_ID: 21PSX0163AA
Line Status: Pending
CM Num: CM_2157_9014998
PO_Auth: CONT

Line Comments:

Ship Line: 1
Attention: DAS-
Ship Via: COMMON

Ship To: 0640000558
Due Date:
Freight Terms:FOB DEST

Address:
450 Columbus Blvd
Hartford CT 06103
United States

Shipping Quantity: 6
Shipping Total: 148.14

Dist	Status	Location	Qty	Percent	Amount	GL Unit	Account
1	Open	ACORE	3	50.00	74.07	STATE	53390

Dept	Fund	Program	SID
DAS23920	11000	14000	10020

Open QTY	PC BU	Project	Open Amt
3	NONPC	DAS_NONPROJECT	74.07

GL Base Amount	Currency	Sequence	Capitalize
74.07	USD	0	N

Dist	Status	Location	Qty	Percent	Amount	GL Unit	Account
2	Open	ACORE	3	50.00	74.07	STATE	53390

Dept	Fund	Program	SID
DAS23920	11000	14000	10020

Open QTY	PC BU	Project	Open Amt
3	NONPC	DAS_NONPROJECT	0.00

GL Base Amount	Currency	Sequence	Capitalize
74.07	USD	0	N

View Print

The **View Print** action displays a printable version of the requisition. The user will be prompted to choose whether to include distribution details or to view it without those details.

Cancel

The **Cancel** action will cancel the requisition.

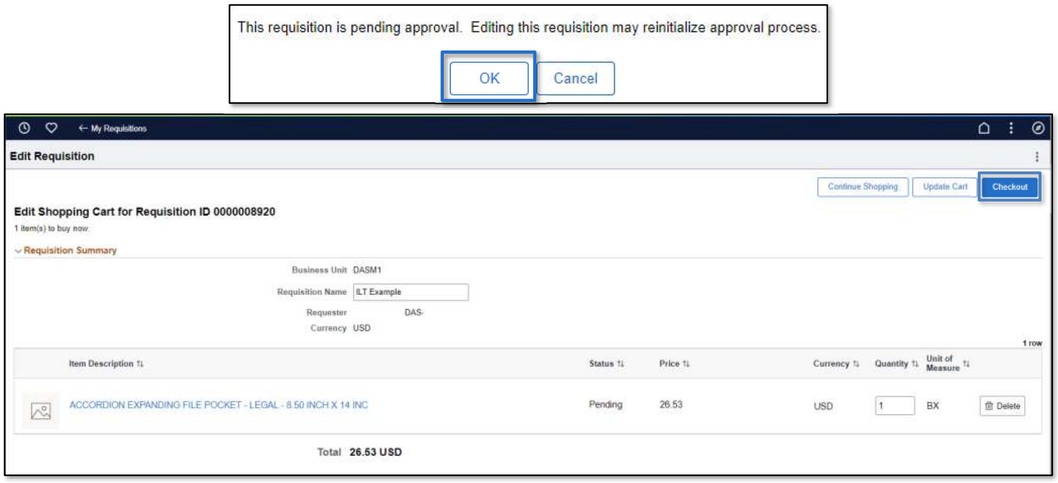
Canceling a Requisition job aid.docx

Cancel

The **Cancel** action will terminate the requisition. You will be prompted with, "Are you sure you want to do this?" Once canceled, the request state will be marked as canceled.

Edit

The **Edit** action allows the user to edit the requisition. A pop-up window appears, indicating that editing a requisition may restart the approval process. Click 'OK' to acknowledge. Click **Checkout** to proceed.

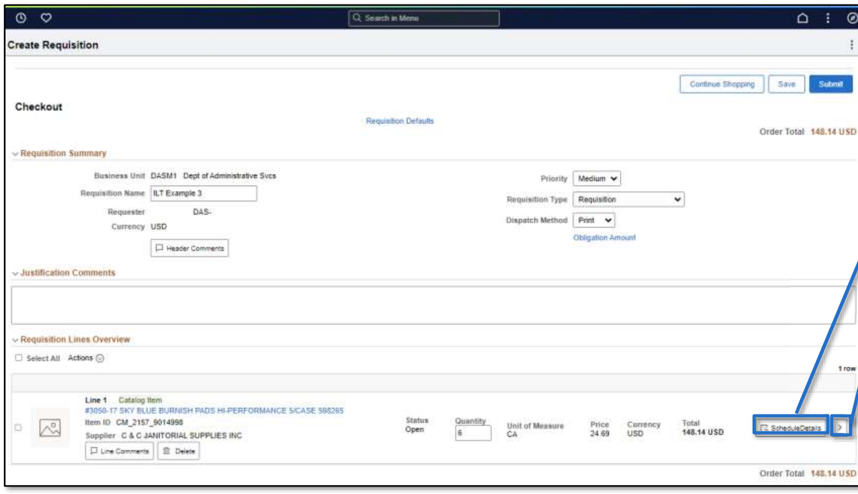


Edit

The **Edit** action allows the user to modify the requisition. A pop-up window will appear, informing you that editing a requisition may restart the approval process. Click **'OK'** to acknowledge this message, then click **Checkout** to proceed. You can make Req

Edit

Click the **Schedule Details** button or the **>** to navigate to the **Line Details** page to make edits to the requisition.



Clicking the **Schedule Details** button brings you to the Schedule Details page where Distributions are displayed.

Clicking the **>** brings you to the **Line Details** page.

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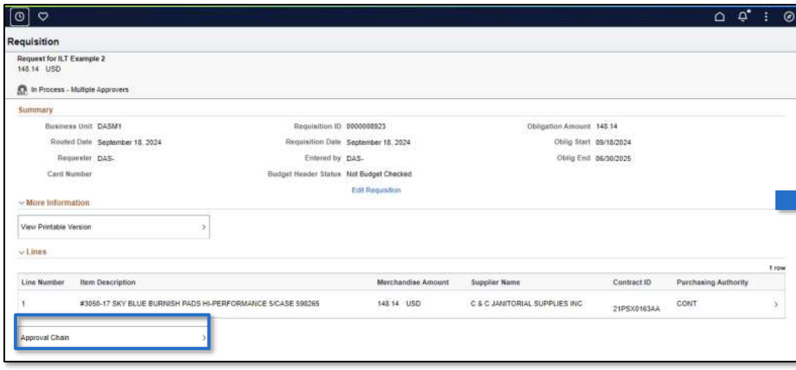
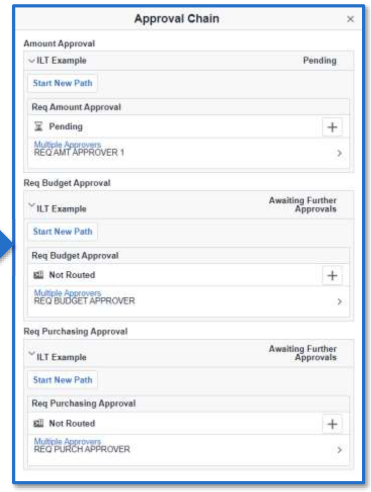
To make edits, click the **Requisition Defaults** hyperlink, or **Schedule Details** button or the arrow **">"** to review or change the **Line Details/ Schedule Details** pages.

View Approval

The **View Approval** action allows the user to see where the requisition is in the approval process.





Review_Approval_History_Job_Aid.docx

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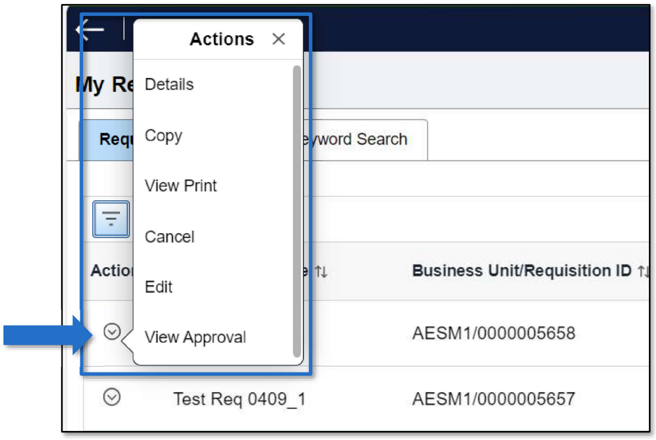
Approval Chain

The **Approval Chain** action enables the user to see the current status of the requisition in the approval process.

At the bottom, there is a hyperlink to the **Review Approval History** job aid.

My Requisitions Key Points

Click Actions drop down list to select an action for the requisition you are working on:



- **Details:** Displays the requisition lifeline.
- **Copy:** Copies the original requisition line details and coding. Punch-Out Requisitions cannot be copied.
- **View Print:** Brings up a Printable version.
- **Cancel:** Displays a pop-up window confirming you wish to cancel the requisition.
- **Edit:** Allows users to edit the requisition (name, quantity, etc.)
- **View Approval:** Displays who approved the requisition and at what stage in approvals it is currently.

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To review:

Click Actions drop down list to select an action for the requisition you are working on:

✓ **Details:** displays the requisition lifeline

✓ **Copy:** Copies the original requisition line details and coding. Punch-Out Requisitions cannot be copied.

✓ **View Print:** Brings up a printable version.

✓ **Cancel:** Brings up a pop-up window confirming you wish to cancel the requisition.

✓ **Edit:** Allows users to edit the requisition (name, quantity, etc.)

✓ **View Approval:** displays who approved the requisition and what stage in approvals it is currently at.

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Updated Job Aids

Job Aid Name	Job Aid Links
Copying an Existing Requisition	Copying an Existing Requisition.docx
Review Approval History	Review_Approval_History_Job_Aid.docx
Viewing a Copy of a Requisition	Viewing_a_copy_of_a_REQ.docx
Canceling a Requisition	Canceling a Requisition job aid.docx

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Job Aids for Managing Requisitions

Here are the job aids associated with managing requisitions:

1. **Copy an Existing Requisition** - Steps for copying requisitions based on past orders.

2. **Review Approval History** - Information on checking the approval

status of requisitions.

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What Questions Are There?

- Post questions within the chat

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Are there any questions about what was discussed in **Unit 1: Creating Requisitions**? If you have any specific topics or points you'd like to revisit, feel free to ask!

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Unit 3: Approvals

In this unit, we'll go over the Approvals process. This session will guide you through the streamlined and intuitive Approvals interface, designed to improve the efficiency and transparency of the approval process.

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Approvals

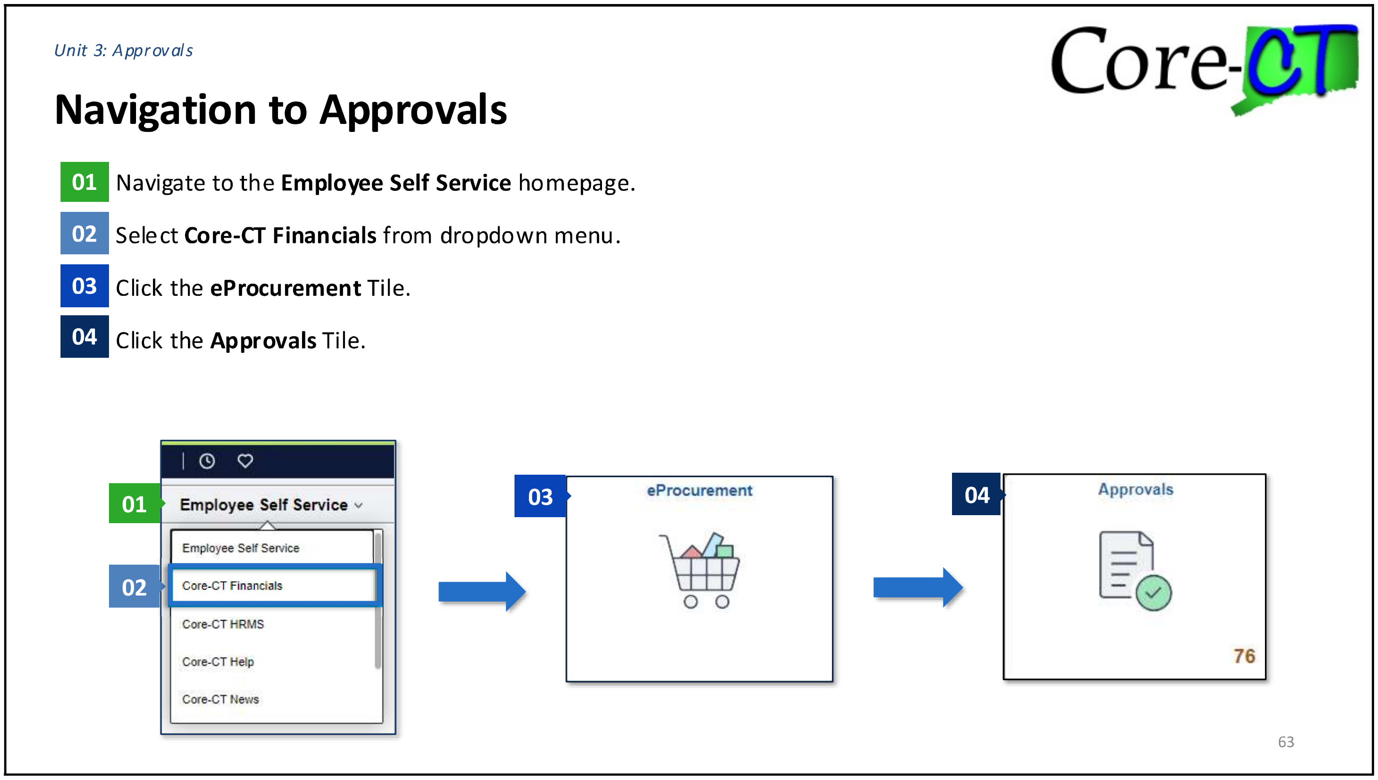
In this unit, we will cover the Approvals process. This session will guide you through the streamlined and intuitive Approvals interface, designed to enhance the efficiency and transparency of the approval workflow.

Key topics will include:

•Navigating the Approvals interface

•Understanding approval statuses

•Managing and tracking approvals effectively



<u>Approvals Navigation</u>

1. Navigate to **Employee Self Service**
2. Select **Core-CT Financials** from dropdown menu.
3. Click **eProcurement** Tile.
4. Click **Approvals** Tile

Approvals Overview

- **Review and Approve Requests**: Approvers can quickly review requisitions, view all relevant details and access Approval options directly from the Approvals page.

- **Integrated Workflow**: The approvals process is integrated with the overall requisition lifecycle, ensuring that all necessary documentation, and compliance steps, are completed before approval.

Throughout this session, we'll explore how to navigate the **Approval** screens, process requisitions efficiently, and manage common tasks such as **adding comments** and **reviewing history** for a complete audit trail.

This streamlined process not only enhances visibility for approvers but also ensures compliance with your organization's procurement policies.

•**Quick Review**: Approvers can efficiently review requisitions, view all relevant details, and access approval options directly from the Approvals page.

•**Integrated Workflow**: The approvals process is seamlessly integrated with the overall requisition lifecycle, ensuring that all necessary documentation and compliance steps are completed prior to approval.

Throughout this session, we will:

•Explore how to navigate the Approval screens

•Process requisitions efficiently

•Manage common tasks such as adding comments and reviewing history for a complete audit trail

This streamlined process enhances visibility for approvers and ensures compliance with your organization's procurement policies.

Pending Approvals

On the **Pending Approvals** page, the user sees **Requisitions** and **Purchase Orders** that are pending approvals, based on the user's role.

01 # of POs pending Approval

02 # of Requisitions pending Approval

03 Clicking the Req/PO will direct the user to that Req/PO.

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On the **Pending Approvals** page, the user can see:

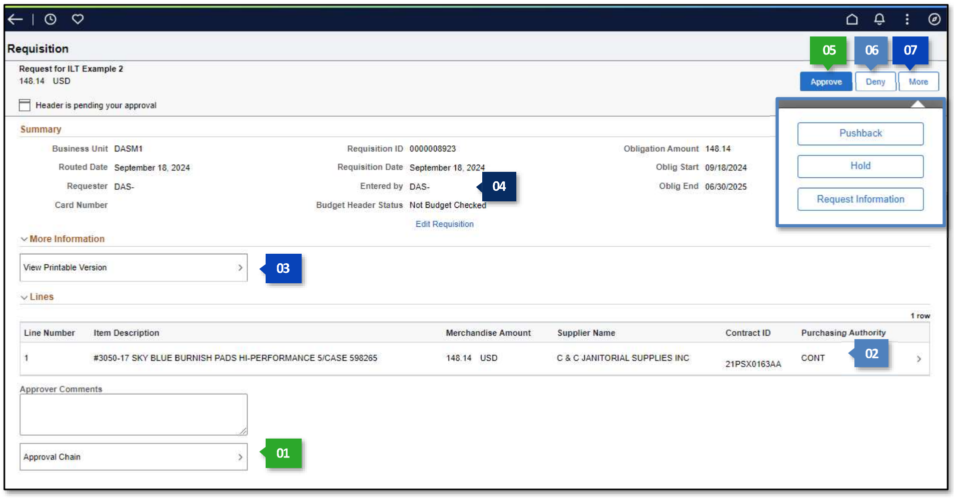
•# of POs pending Approval

•# of Requisitions pending Approval

Clicking on a requisition or purchase order will direct the user to that specific item for further review.

Unit 3: Approvals

Requisition Approval



01 View Approval Chain

02 Approval Line Detail

03 View Printable Version

04 Edit Requisition

05 Approve

06 Deny

07 More

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On the **Requisition Approval Page**, you have the following options:

•**View Approval Chain**

•**Approval Line Details**

•**View Printable Version**

•**Edit Requisition**

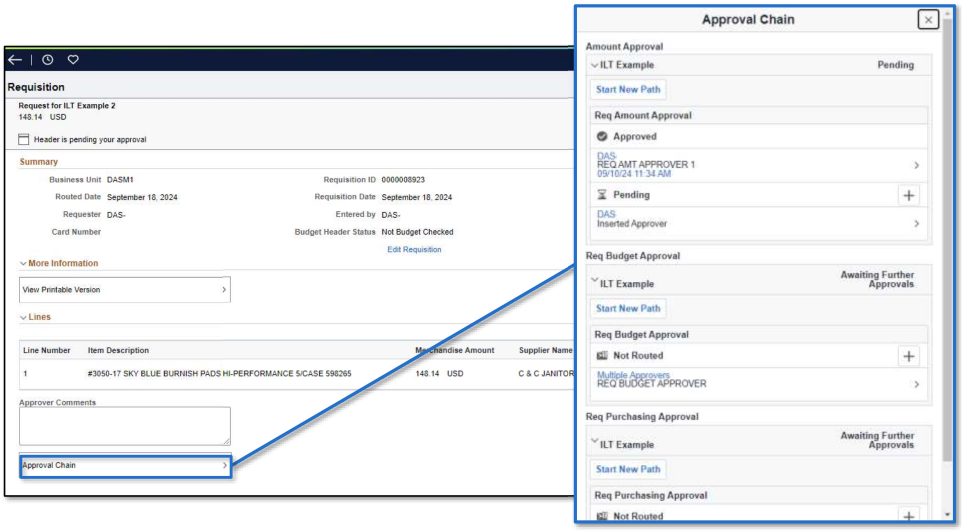
•**Approve**

•**Deny**

•**And More**, where you can find options for Pushback, Hold, and Request Information.

Approval Chain

Clicking the **Approval Chain** box displays the multiple steps in the approval process and their status.

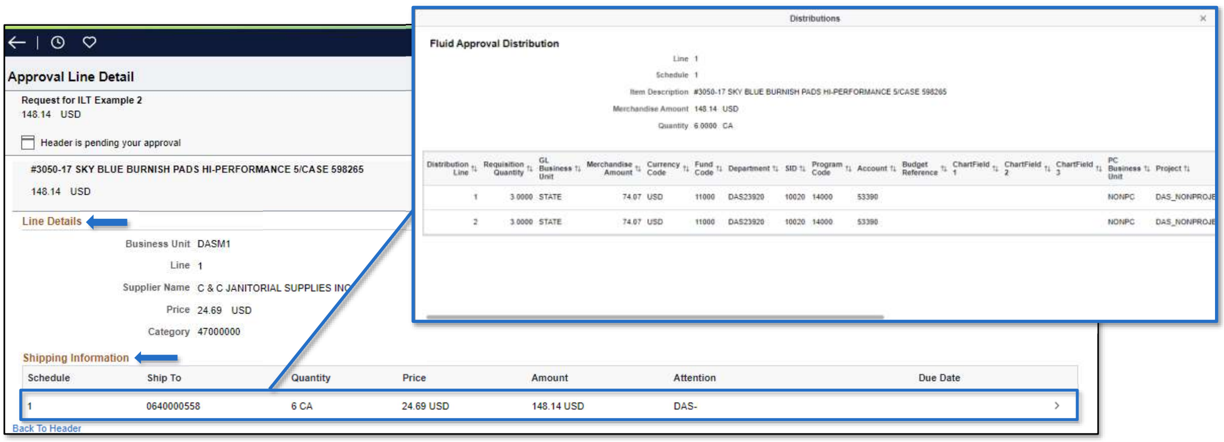


Clicking the **Approval Chain** box displays the various steps in the approval process along with their current status.

At the bottom, you will find hyperlinks to the **Review Approval History** job aids.

Approval Line Detail

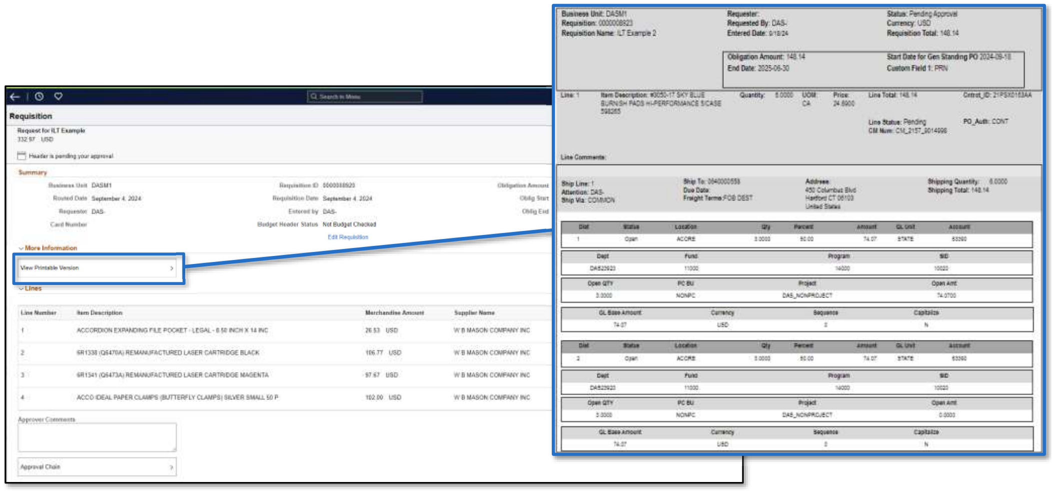
Selecting a **Line** displays the **Approval Line Detail** page which shows the **Line Details** and **Shipping Information** of the specific line item selected. Clicking on the line under **Shipping Information** brings up the **Distribution** details.



Selecting a **Line** displays the **Approval Line Detail** page which shows the **Line Details** and **Shipping Information** for that line. Clicking on the Schedule line (under **Shipping Information)** shows the **Distribution** details.

View Printable Version

Clicking **View Printable Version** brings up a printable version of the requisition.

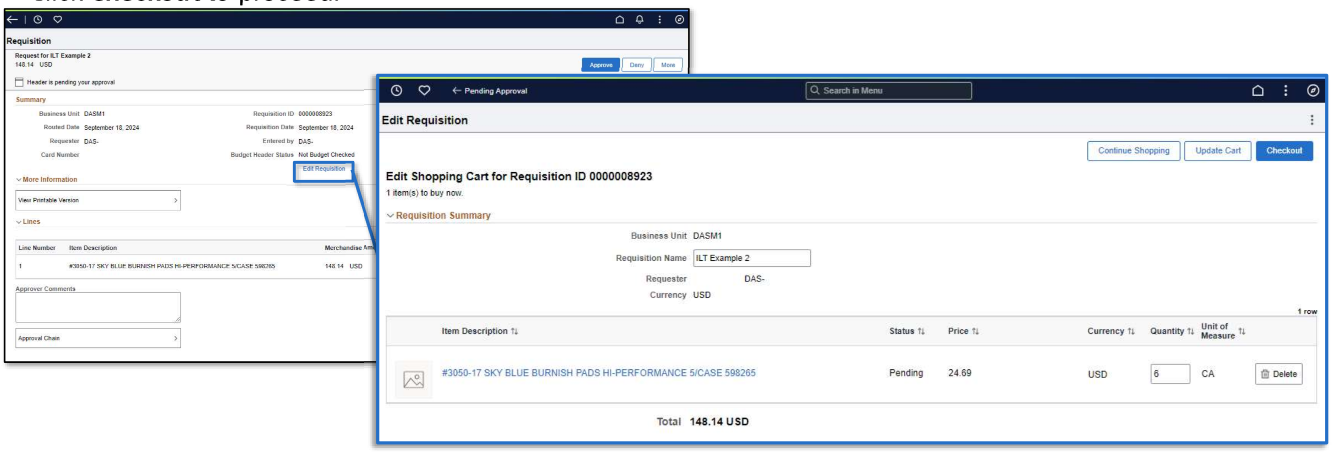


Clicking **View Printable Version** brings up a printable version of the requisition, you have the option to view with or without the distribution details.

Unit 3: Approvals

Edit Requisition

Clicking **Edit Requisition** brings up the **Edit Requisition** page allowing the approver to edit the requisition. Click **Checkout** to proceed.



Approving_Requisition_After_Editing_Job_Aid.docx

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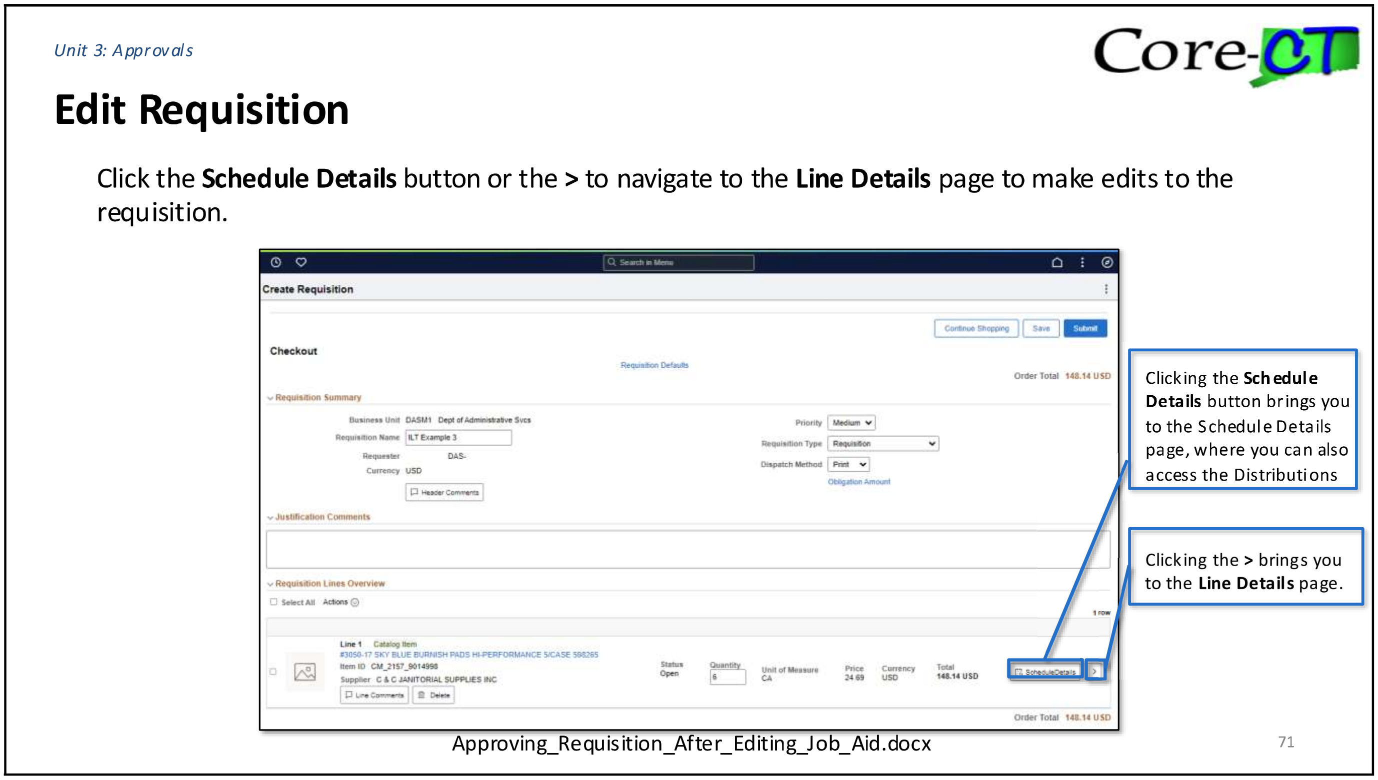
Clicking **Edit Requisition** opens the Edit Requisition page, allowing the approver to make changes to the requisition. Click **Checkout** to proceed.

At the bottom, there is a hyperlink to the **Approving Requisition After Editing** job aid.

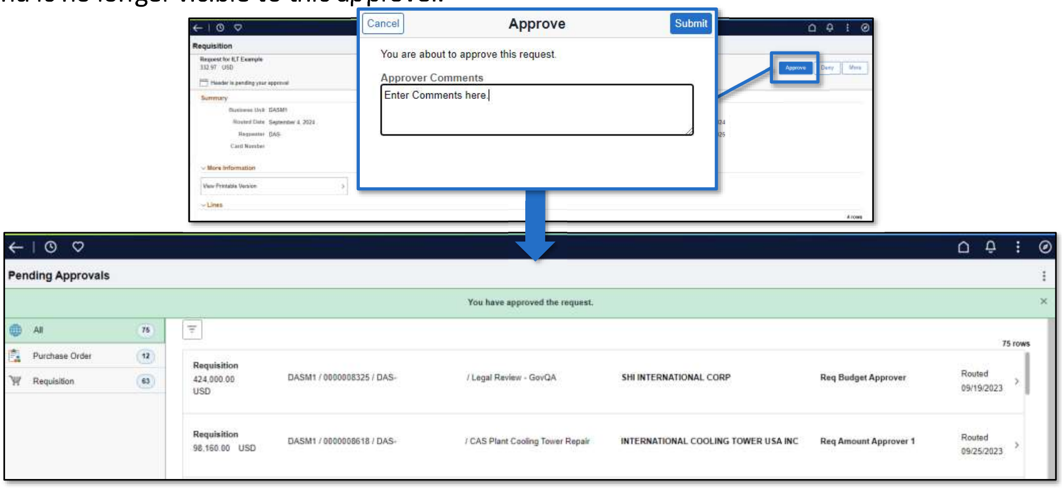


Click the **Schedule Details** button or the **>** to navigate to the **Line Details** page to make edits to the requisition.

Unit 3: Approvals

Approve

Clicking **Approve** prompts the user to enter **Approver Comments** before clicking **Submit** to approve the requisition. Comments are not required for Approvals. A notification appears on the **Pending Approvals** page and is no longer visible to this approver.



Requisition Approvals.docx

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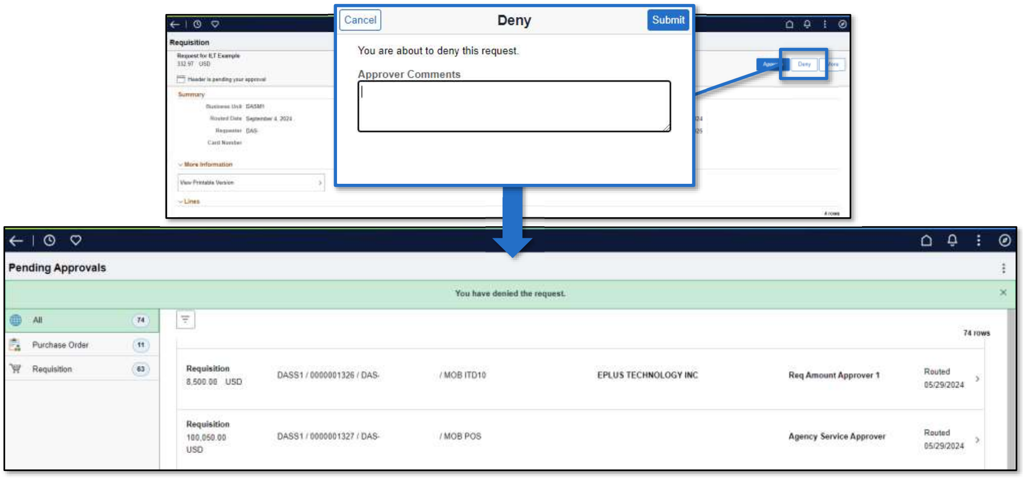
Clicking **Approve** prompts the user to enter Approver Comments before clicking **Submit** to approve the requisition. Comments are not required for the Approve Action. Clicking Submit will Approve the req, which will drop form the current Approver's level, and move to the next level of approvals. An Alert Notification will go to the Requester once a req is fully Approved.

Deny

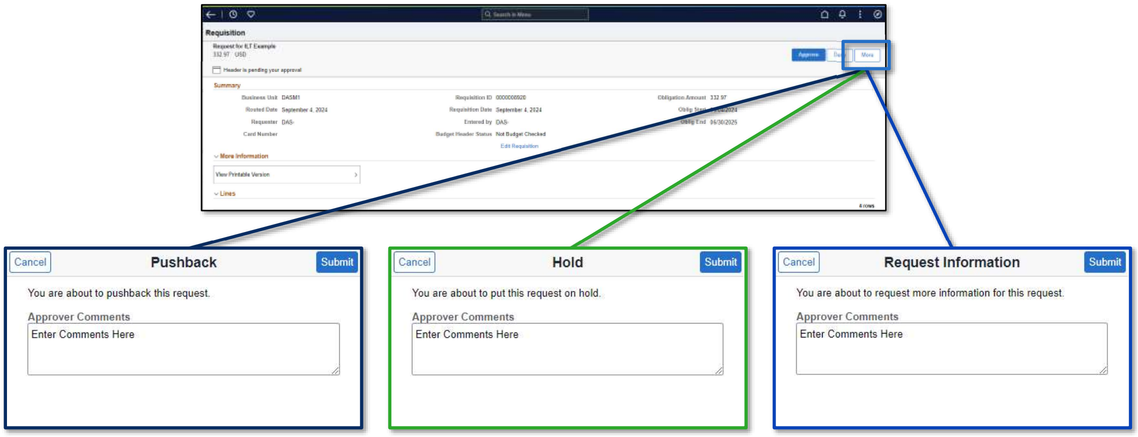
Clicking **Deny** prompts the user to enter **Approver Comments** before clicking **Submit** to deny the requisition. Comments are required for **Deny.** A notification appears on the **Pending Approvals** page and the requisition is terminated.



Clicking **Deny** prompts the user to enter **Approver Comments** before clicking **Submit** to deny the requisition. Comments are required for **Deny.** An Alert notification goes to the Requester and the requisition is terminated from the workflow.

More

Clicking **More** brings up more options including **Pushback, Hold,** and **Request Information**. Comments are required for these functions.



Requisition Approvals.docx

Placing_a_Requisition_on_Approval_Hold.docx

Clicking **More** brings up more options including **Pushback, Hold,** and **Request Information**. Comments are required for these functions.

Updated Job Aids

Job Aid Name	Job Aid Links
Approving Requisition After Editing	Approving_Requisition_After_Editing_Job_Aid.docx
Review Approval History	Review_Approval_History_Job_Aid.docx
Placing a Requisition on Approval Hold	Placing_a_Requisition_on_Approval_Hold.docx
Add ADHOC Approver/Reviewer	Add Adhoc Approver_Reviewer.docx
Requisition Approvals	Requisition Approvals.docx

Here you have the job aids associated with approvals.

Core-CT

What Questions Are There?

- Post questions within the chat

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Are there any questions on **Unit 3: Approvals**? If you need any clarification or have specific inquiries, feel free to ask!

Unit 4: My Receipts

In this unit, we’ll cover creating and managing receipts in 'My Receipts' using the new Fluid UI, highlight navigation changes, and demonstrate how receipts are managed within the Fluid interface.

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In this unit, we’ll cover creating and managing receipts in 'My Receipts' using the new Fluid UI, highlight navigation changes, and demonstrate how receipts are managed within the Fluid interface.

Receipts Overview

A receipt is created to accept item(s) or services received. The receipt is then saved, and the vendor payment process continues in the Accounts Payable module.

- **Receipts are required for all Purchase Orders.**
- Receiving can be done in both **Purchasing** and **eProcurement modules:**
  - The PO must be dispatched.
  - The user needs the **General Receiver** or **Casual Receiver** role to receive.
  - **Casual receivers** are limited to receiving dispatched POs that originate from requisitions they created.

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Receipts Overview

- Receipts are required for all Purchase Orders.
- Receiving can be done in both purchasing and eProcurement modules
- The PO must be dispatched
- The user needs the General Receiver or Casual Receiver role to receive.
- Casual receivers are limited to receiving dispatched POs that originate from requisitions they created.

Navigation to Add/Update Receipts

01 Navigate to the **Employee Self Service** homepage.

02 Select **Core-CT Financials** from dropdown menu.

03 Click the **eProcurement** Tile.

04 Click the **Add/Update Receipts** tile to add and update receipts.

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To navigate to receipts using the fluid interface:

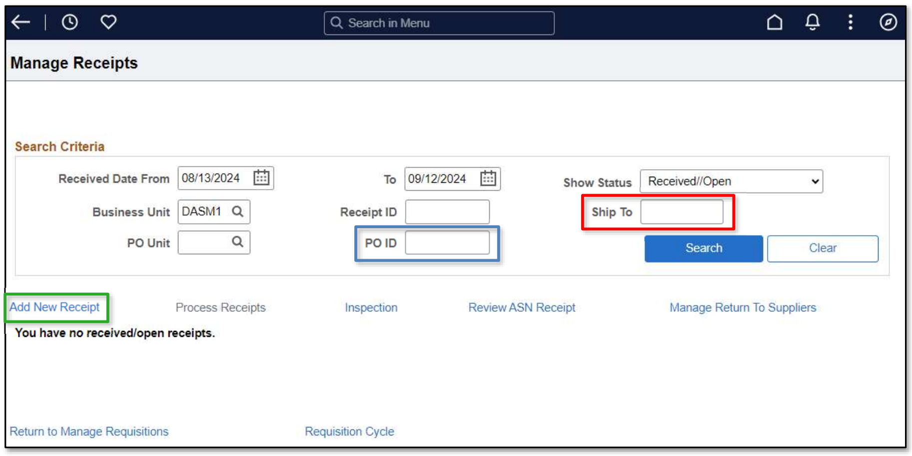
1. Navigate to **Employee Self Service**
2. Select **Core-CT Financials** from dropdown menu.
3. Click **eProcurement** Tile.
4. Click **Add/Update Receipts** tile

Add/Update Receipts

To add a receipt, click the **Add New Receipt** hyperlink.

To update a receipt, select the **Purchase Order** to receive, then enter the search criteria (**PO ID**).

Make sure to delete the defaulted **Ship To** value before searching.

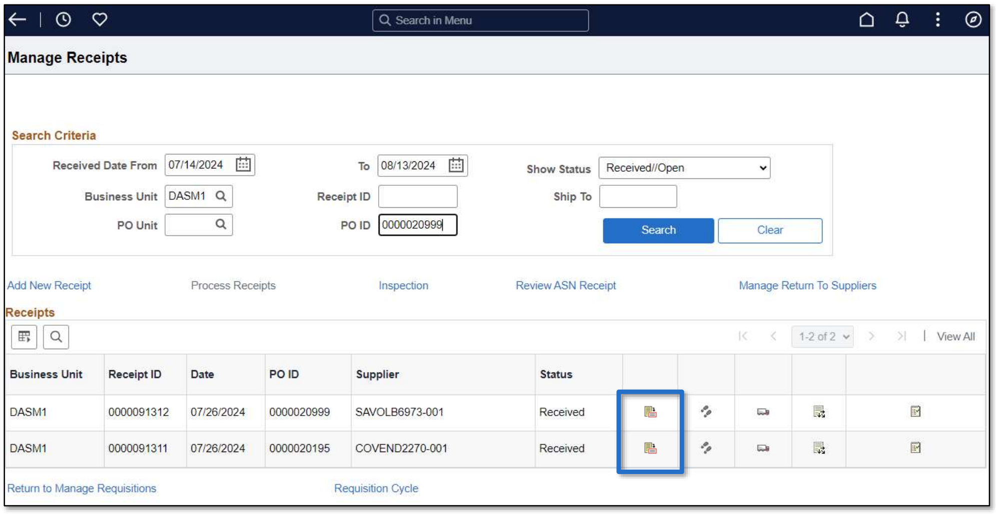


To add a receipt, click the **Add New Receipt** hyperlink.

To update a receipt, search the purchase order you wish to receive, Be sure to delete the defaulted **Ship To** value before conducting the search.

Add/Update Receipts

After searching by **PO ID**, click **Details** to navigate to the **Receiving** page.



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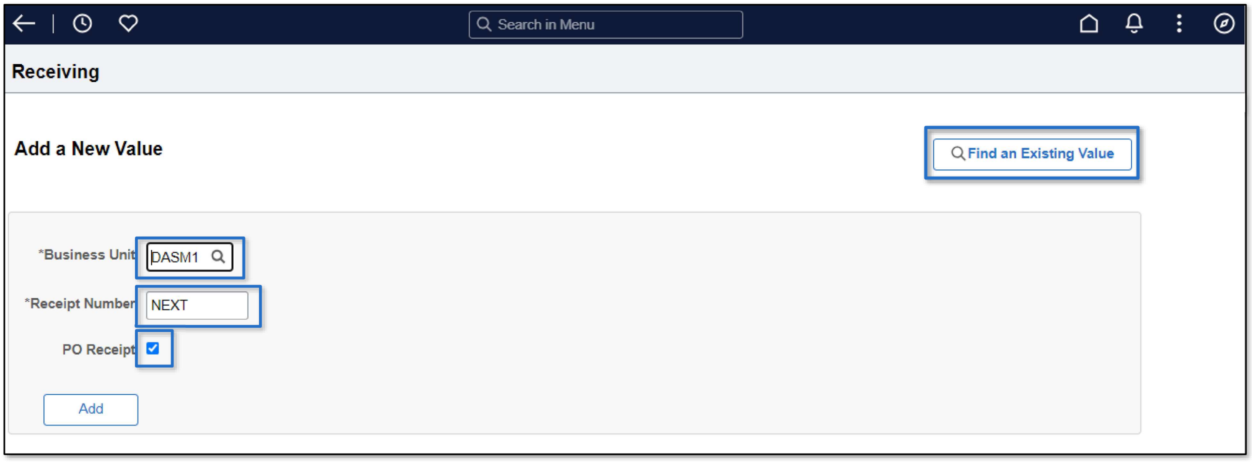
After searching by **PO ID**, click the **Details** icon to navigate to the **Receiving** page.

Add a New Receipt

On the **Receiving** page, to add a new value, ensure the correct **Business Unit** is selected and check the **PO Receipt** box. The **Receipt Number** is automatically generated. User can also **Find an Existing Value** to search for an existing receipt.



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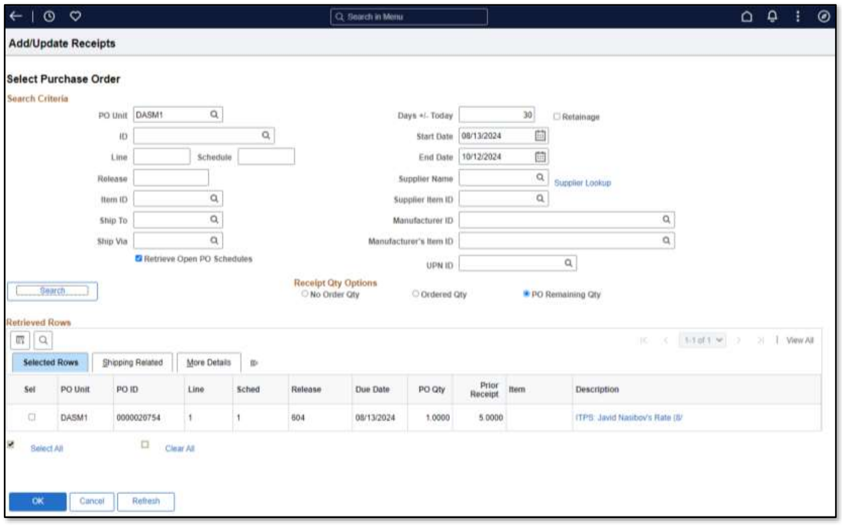
On the **Receiving** page, to add a new value, ensure the correct **Business Unit** is selected and check the **PO Receipt** box. The **Receipt Number** is automatically generated. User can also select **Find an Existing Value** to search for an existing receipt.

Add a New Receipt

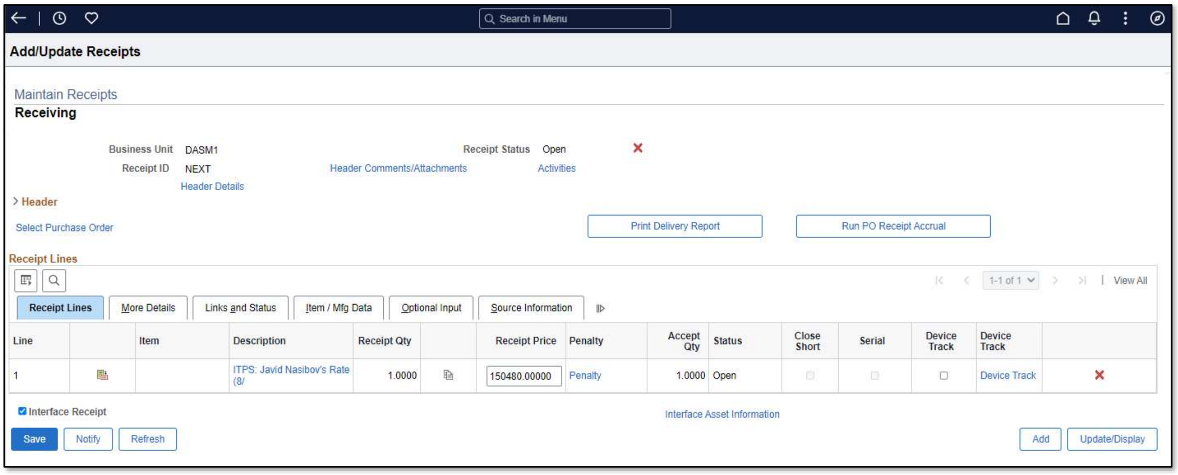
Here, the user inputs information into the **Search Criteria** fields to locate and update an existing Purchase Order.



Here, the user inputs information into the **Search Criteria** fields to locate and update an existing Purchase Order.

Add a New Receipt

On the **Receiving** page, enter information such as received quantities and shipping details as applicable. Users may also need to update information like delivery dates or receiving locations. Save to complete the process and generate the receipt record in the system.



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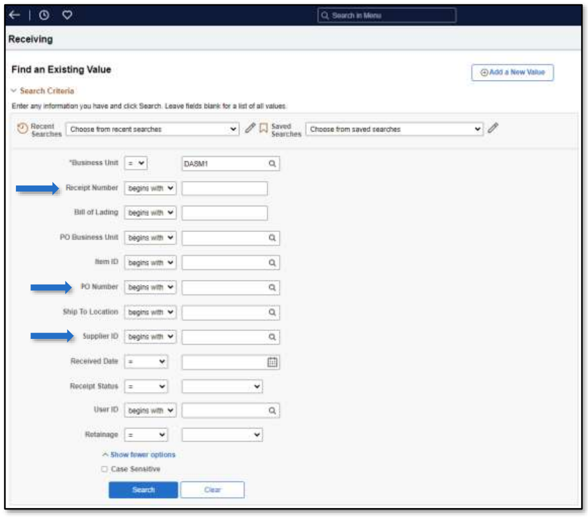
On the **Receiving** page, enter information such as received quantities and shipping details as applicable. Users may also need to update information like delivery dates or receiving locations. Save to complete the process and generate the receipt record in the system.

Find an Existing Value

Enter the Receipt Number, Purchase Order Number (PO Number), or Supplier ID into the corresponding search fields.



Enter the Receipt Number, Purchase Order Number (PO Number), or Supplier ID into the corresponding search fields.

Find an Existing Value

Review the **Search Results** and select the relevant receipt to view or update.

Search Results

Only the first 300 results of a possible 88320 can be displayed. Business Unit "DASM1"

1-10 of 300 View 100

Business Unit	Receipt Number	Bill of Lading	PO Business Unit	Item ID	PO Number	PO Receipt	Receive Source	Ship To Location	Shipment Number	Supplier ID	Supplier Name 1	Received Date	Receipt Status	User ID	Description	Retainage
DASM1	20408	(blank)	DASM1	(blank)	0000020408	Y	On-line	0640000558	(blank)	0000188868	ROADSTONE LLC	05/11/2023	Received		DAS-	(blank)
DASM1	1864	(blank)	DASM1	(blank)	0000009259	Y	On-line	0430000023	(blank)	0000010075	DELL MARKETING LP	09/25/2013	Moved		OSC-	(blank)
DASM1	14732	(blank)	DASM1	(blank)	0000008913	Y	On-line	0640000035	(blank)	0000012108	FIP CONSTRUCTION INC	03/31/2014	Received		DAS-	(blank)
DASM1	10300	(blank)	DASM1	(blank)	0000010300	Y	On-line	0640000035	(blank)	0000012838	FLETCHER THOMPSON INC	07/21/2014	Received		DAS-	(blank)
DASM1	0NEXT	(blank)	DASM1	(blank)	0000019694	Y	On-line	0640000558	(blank)	0000059169	JP MORGAN CHASE BANK	10/31/2022	Received		DAS-	(blank)
DASM1	0000091312	(blank)	DASM1	(blank)	0000020999	Y	On-line	0640000558	(blank)	0000020356	SAVOL BLEACH COMPANY	07/26/2024	Received	ACC_	Accenture	(blank)
DASM1	0000091311	(blank)	DASM1	(blank)	0000020195	Y	On-line	0640000550	(blank)	0000180585	COVENDIS	07/26/2024	Received	ACC_	Accenture	(blank)
DASM1	0000091310	(blank)	DASM1	(blank)	0000020984	Y	On-line	0640000558	(blank)	0000000089	NEW BRITAIN CITY TREASURER	05/28/2024	Received		DAS-	(blank)
DASM1	0000091309	(blank)	DASM1	(blank)	0000021058	Y	On-line	0640000558	(blank)	0000010334	W B MASON COMPANY INC	05/16/2024	Received		DAS-	(blank)
DASM1	0000091308	(blank)	DASM1	(blank)	0000021025	Y	On-line	0640000550	(blank)	0000064731	EPLUS TECHNOLOGY INC	02/29/2024	Moved		DAS-	(blank)

Review the **Search Results** and select the relevant receipt to view or update.

Core-CT

Navigation to My Receipts

01 Navigate to the **Employee Self Service** homepage.

02 Select **Core-CT Financials** from dropdown menu.

03 Click the **eProcurement** Tile.

04 Click the **My Receipts** tile to view and update receipts.

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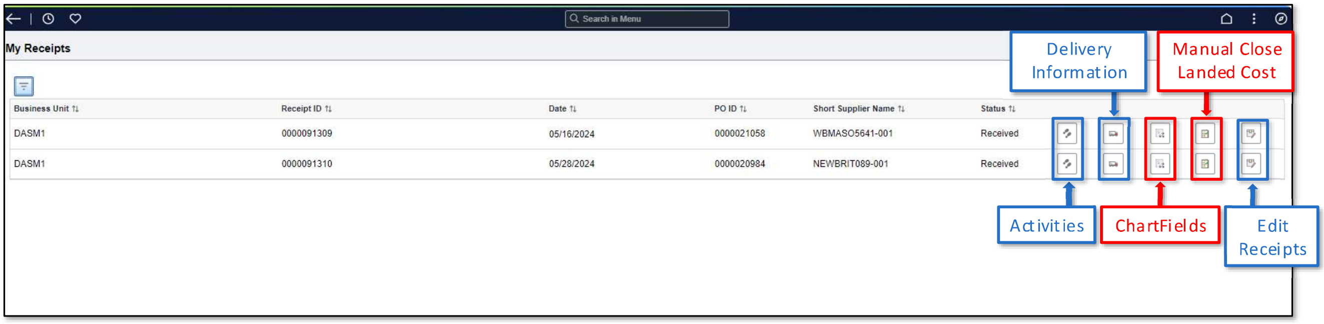
To navigate to receipts using the fluid interface:

1. Navigate to **Employee Self Service**
2. Select **Core-CT Financials** from dropdown menu.
3. Click **eProcurement** Tile.
4. Receipts can be viewed and updated in the **My Receipts** tile
5. Click **My Receipts** tile

My Receipts

On the My Receipts page, the user sees active receipts they have created. The search criteria filters adjust the results depending on user security. The user has the option to click **Activities**, **Delivery Information**, and/or **Edit Receipts**.



Please note: The **ChartFields** and **Manual Close Landed Cost** icons are displayed but are currently **not active functions**.

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My Receipts

On the **My Receipts** page, the user can view active receipts they have created. The search criteria filters adjust the results based on the user's security permissions.

Users have the following options:

•Click on **Activities**

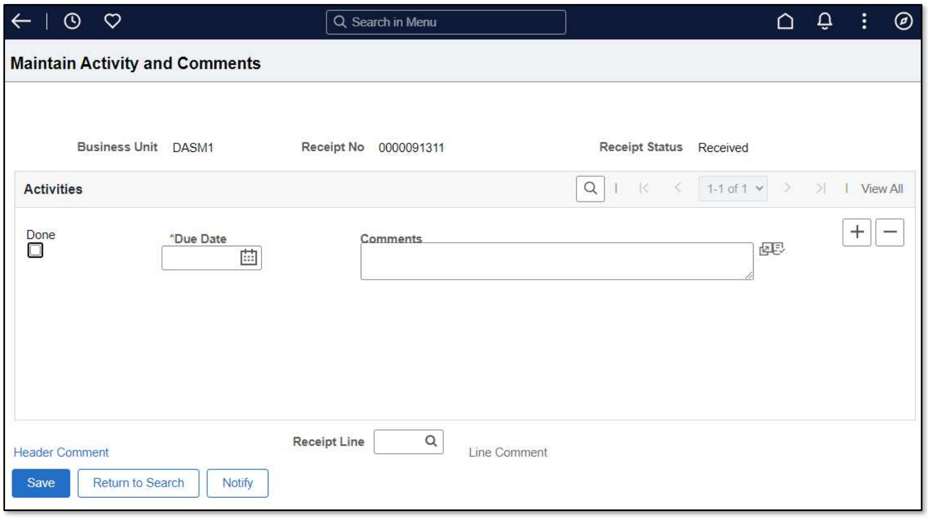
•View **Delivery Information**

•Edit **Receipts**

Please note that the **Chartfields** and **Manual Close Landed Cost** icons are displayed but are currently inactive functions.

Maintain Activity and Comments

On the **Maintain Activity and Comments** page, the user has the option to track activity history and add comments.



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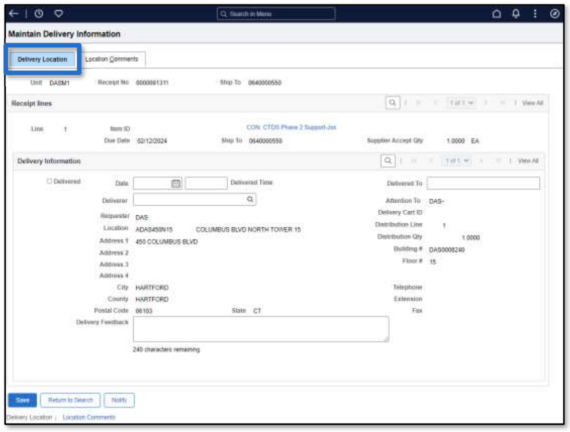
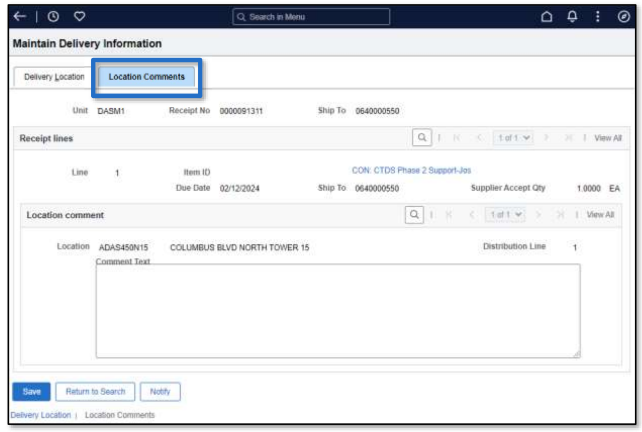
On the **Maintain Activity and Comments** page, the user has the option to track activity history and add comments.

Delivery Information

On the **Maintain Delivery Information** page, there are two tabs, **Delivery Location** and **Location Comments**. The user adds or updates delivery information under the **Delivery Location** and **Location Comments** tabs as needed.





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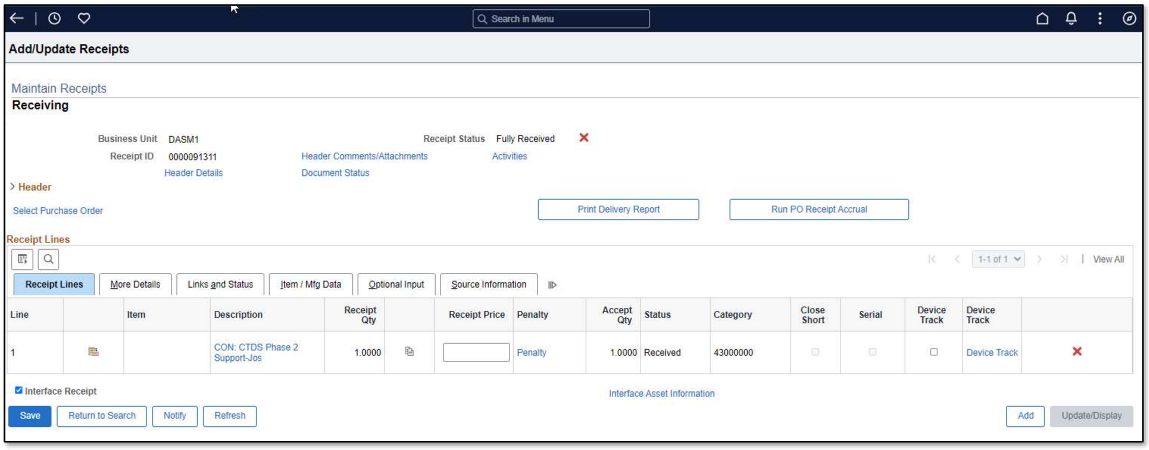
On the **Maintain Delivery Information** page, there are two tabs, **Delivery Location** and **Location Comments**. The user adds or updates delivery information under the **Delivery Location** and the **Location Comments** tabs as needed.

Edit Receipts

Clicking on the **Edit Receipts** icon directs the user to the Add/Update Receipts page where they can make modifications to the selected receipt.



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Clicking on the **Edit Receipts** icon directs the user to the Add/Update Receipts page where they can make modifications to the selected receipt.

Receipts Key Points

- **A receipt is created to accept item(s) or services received**.
  - Optional information for the receipt of items, such as comments can be entered. The receipt is then saved, and the vendor payment process continues in the Accounts Payable module.
- **To receive in the eProcurement module,**
  - The associated PO must be dispatched
  - The **Casual Receiver** or **General Receiver** role is required.
- **The Receipt Date is the date the item(s) were received**. It is not the date the receipt is created in Core-CT. Edit the Receipt Date field, if appropriate.

Receipts Key Points

To recap:

- Receiving is required for all Requisitions. A receipt is created to accept item(s) or services received. Optional information for the receipt of items, such as comments can be entered. The receipt is then saved, and the payment process continues in the Accounts Payable module.
- To receive in the eProcurement module, the associated PO must be dispatched. Either the Casual Receiver or General Receiver role is required.

- The Receipt Date is the date the item(s) were received.

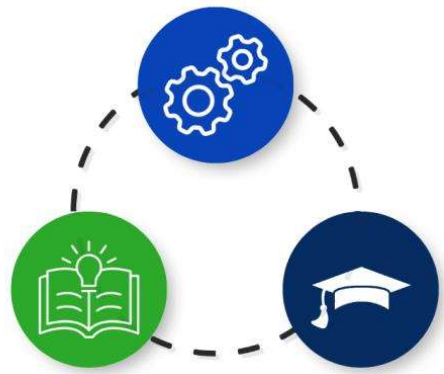
It is not the date the receipt is created in Core-CT. Edit the Receipt Date field, if appropriate.

Summary Review

Let’s Review our Learning Objectives:

You’re now familiar with:

- **Create a new requisition**
- **Manage existing requisitions**
- **Requisition Approvals**
- **Create new receipts**
- **Manage existing receipts**



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Learning Objectives Review

You are now familiar with:

•Creating a new requisition

•Managing existing requisitions

•Understanding requisition approvals

•Creating new receipts

•Managing existing receipts

Core-CT

What Questions Are There?

- Post questions within the chat

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Are there any questions on **Unit 4: My Receipts**? If you need clarification or have specific inquiries, feel free to ask!

Summary Review

Post Training Follow Ups

Please enter a FootPrints ticket with any questions:

- URL: https://footprints.ct.gov/footprints
- FootPrints tickets route directly to the Teams
- If FootPrints Access is needed please email the readiness mailbox with the Subject: FootPrints Access
- Readiness@ct.gov (anyone without a ct.gov email address)

Do you have any questions?

Congratulations on completing the eProcurement Course!

- Complete the Training Evaluation.
  eProcurement Course Survey
- Review the course material after Training completion.
  Training Material Location
- Reference the Core-CT Modernization site for more information:
  Core-CTModernizationProject(state.ct.us)

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Congratulations!

You have successfully completed the eProcurement Course!

Please take a moment to complete the training evaluation; your feedback is greatly appreciated.

The course material is available for your reference and will be posted in the chat.

For more information, please visit the **Core-CT Modernization** site. Thank you for your participation!