Transcript

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started transcription

Richmond, Michele 0:11
Morning everyone.
My name is Michelle Richmond.
We we ask that during the course you put your 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 E procurement processes.
Today I will be your trainer.
I will be presenting the the course content and taking questions at the end of each unit.
We have a facilitator that will be managing the time and organizing and directing your questions.
You will be today's participants.
You can ask any questions directly into the meeting chat.
A few of the benefits of the new fluid interface are it's easier and more intuitive to use.
Navigation is easier.
And it also caters to various users.
The primary goal of this course is to provide an overview of creating new requisitions, managing current requisitions, approving requisitions, and generating and managing receipts. Along with the new fluid UI for E procurement.
Here's today's agenda.
We'll be covering creating a new requisition, managing requisitions, approvals and receipts.
Student one creating a new requisition.
In this unit, we will explore the process of creating a new requisition in the updated fluid UI. I will discuss navigational changes, compare revised pages, and I will provide an overview of the workflow processes that take place once requisitions are submitted.

Core Core utilizes a three-step requisitioning process.
First step is to find a requisition.
Next is add items and services and review and submit.
Here is a look at the brand new fluid interface. I've highlighted some of the new tiles that you'll be using for your key E procurement tasks, including the E procurement tile approval tiles, requisition tiles, managing requisition tiles, my receipt tile, and add update receipt tile.
These are examples of when you would use an E procurement requisition when selecting from the state catalog when buying office supplies via punch out when submitting special requests, or when submitting ITD 10s, DAS bids TS Rs or APSA POS requisition types.
To create a new requisition, navigate to employee self-service.
Select core CT financials from the drop down menu clip or tap the E procurement tile, and then click or tap the create requisition tile.
Acquisition defaults. The requisition default page is where you will fill in your preference for header line shipping and distribution defaults. At this point you can enter the buyer the ship to due date and the chart field coding which will be applied to each line of your requisition.
If ordering from a catalog or doing a punch out order, do not 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 chart field one section if ordering from the catalogue or via punch out, and will override if different values you enter in the defaults.
The distribution chart fields are now displayed in three separate tabs, chart field 1-2 and three.
Use the show all to display all the fields in the accounting defaults on the same page.
If the items are inventory items, clip or tap on the details tab to enter the inventory business unit. If the items are.
If the items are assets, click or tap on the asset Information tab and enter your asset information business unit and your user ID.
Please take note that the default option box previously found between the header and the line defaults has been removed.
This is now managed through the mass change process, which will be covered later.
Requisitions types.
It's important to select the correct requisition type at this stage. Once a requisition is

saved or submitted, the type cannot be modified on the left. You will find the hyperlinks to the various job aids for different requisition types.
Listed here are the different types of requisitions.
ITT Tents, which is for purchasing it items or services das bids, which is used to initiate the start of a bid that is not on contract or replaces an existing contract.
TSATSR are for telecommunications moves, ads, changes and repairs.
Tsr equipment are for telecommunications equipment, PSA or PS, as are personal service agreements.
POS is for purchase of service contract and requisitions covered most other requisitions.
Each requisition type has a distinct hyperlink that appears below the drop down menu, directing you to the custom pages that also require input. Each requisition should have one designated by.
At the bottom, there's a hyperlink to the define, requisition, obligations, job aid.
Distribution defaults here. You will find defaults and chart field 1-2 and three chart field one includes the input fields, percent location, GL unit and account chart. Field 2 contains fund, Department, CID, program and budget. Reference chart Field 3 features PC business unit, project activity, source type CATEG.
And subcategory.
At the bottom you'll find a hyperlink to modified requisition, default job aid.
Detail tab includes input fields for inventory, unit, budget date, and staff the asset information.
Tap contains input fields for asset management, business unit, profiled ID, capitalization cost, type, and description at the bottom of the page there is a hyperlink to modify requisition, default job aids.
Create a requisition.
Notice that navigation collection on the left side of the create requisition page where you will see the following options, catalog time and material web supplier variable cost services, special request template, fixed cost and favorites.
Catalog search when you click or tap catalog, you'll be directed to the search page.
For more accurate results, use the advanced item search by entering more detailed information about the item you're searching for. The more information that you provide, the more defined your search results will be. Avoiding using the same name search field. It's important to note that the Oracle has Remo.
The search by contract ID field.

This is the advanced search page with paths entering into the description field, clicking or tapping search displays the search results of all category items containing pads in their description.
The catalog.
Or tap the right arrow.
Excuse me.
Click or tap the right arrow to view item details and click or tap add to cart to include the items in to the shopping cart.
At the bottom is a hyperlink to the add items to a requisition using search job aid.
Always remember to create a requisition for the single supplier only.
Item details.
Item details page includes a long description of the item which can help to determine if the item that you are viewing is indeed the one that you want to request.
The item ID represents the catalog management number. Some of you might refer to this as the CM number.
Enter the desired quantity, then click or tap the add button to include the items in your shopping cart.
With the new, with the new persistent CART functionality.
You can add items to your cart, save them and return later to complete your purchase.
For any requisition. I'm sorry for any questions you can contract.
Price.
For any questions about contract pricing in catalog contract specialist, contact a contract specialist at DAS Procurement.
Web suppliers to purchase an item from a web supplier, navigate to the web supplier and select a vendor.
You can then use your vendor site to search for an item and add it to your cart. Once the item is added to your cart, then process functions the same as you have added.
In through the catalogue.
Clicking or tapping, continuing to check out on the vendor site redirects you back to the core Fluid checkout page.
Special request navigate to the special request tab to add items that aren't listed in the catalog. Use the special request page to describe and include goods in the requisition.

Some fields, such as the vendor ID and unit or measure, are required in order to facilitate accurately accurate processing.
You can determine which fields are required by looking for an asterisk preceding the field name.
Can you go back a slide?
Thank you.
You could choose to share additional information by utilizing the comment text field and selecting where you'd like the information to be shown, whether it's in the supplier field, on the receipt, on the voucher, or all three.
Fixed cost service.
Use the fixed cost service page to request a one time service for a flat fee. For example, a contract is hired to retire an electrical panel for an agreed upon total price of $1500.
Time and material use the time and material link to request a service where the fee is based upon the time worked and includes cost for materials that is unknown at the time when you create the requisition. For example, a plumber is hired to repair a broken water he.
At an agency, the plumber charges one. The plumber charges $150.00 per hour.
With the job expecting to take 4 hours a new part.
$75.00 is also required for the repair.
Variable cost.
Variable costs services applies when the time required to complete the repair or service is unknown.
No materials are needed and the cost is not fixed.
A good example would be troubleshooting computer issues at a rate of $125 per hour.
Templates use the add to templates button to save requisition lines for future use.
Select the lines, click or tap add to template and choose an existing template or create a new one accessing access templates from the template tab on the create requisition page to add a template to a requisition, select it or tap it.
Add.
On the template line.
I'm sorry. Let me repeat that.
Access templates from the template tab on create requisition page to add a template to a requisition, select and tap add on the template tab.

Prices will update automatically with the new catalog requisition.
Inactive items won't be included in the line qualities on the checkout page.
To delete templates, click or tap manage personal templates.
Select the template, click or tap the minus button to confirm the deletion, and then click or tap done a hyperlink to the add, delete, share templates job aid is available at the bottom of the slide.
Favorites you can add frequently purchased items to your favorites for easier ordering in future requisitions.
To add an item to favorites, click or TAP add to favorites and confirm the entry by clicking or tapping the done button.
To delete a favorite, go to the favorites tab, click or tap delete, and confirm the deletion to add a favorite item to your requisition, edit the quantity and click.
Or tap add.
You can group these favorite items by selecting the appropriate check boxes, clicking or tapping add to favorite groups, and providing a name and description.
An exclamation point icon indicates inactive items with a hover over message for more details.
Pricing on favorites automatically updates with a new catalog.
Pricing a hyperlink to the add favorites to group job aid is available at the bottom of the slide.
Shopping cart.
Click or tap the shopping cart icon to see an overview of what is currently contained within your cart.
The cart remains active updating you.
As updating as you add items, take advantage of the persistent cart functionality to save your progress and return later to complete your purchase. Even if the CART icon shows zero, always click or tap to check for any unneeded items left from a previous session or requisition.
This is a known Oracle bug.
Side yeah, checking out.
Click or tap the checkout button to access your requisition.
Summary Justification, comments and requisition line overview. Any lines added to the requisition will display in the requisition lines overview box. Clicking or tapping the right arrow will expand each line for reviewing and editing.
Find details. Click or tap the line details to access the line detail page.

All information on this page defaults automatically.
Each requisition should have one buyer and the purchasing authority defaults to contracts.
The contract ID will automatically populate for catalog items, but it must be entered for special request with a purchasing authority of contract.
The requisition cannot be saved without a contract ID if the purchasing authority is set to contract.
Schedule details. Select the schedule details tab to access details.
Schedule information.
The selection provides the comprehensive item summary used to manage and track the delivery services of the requisition line items.
You could specify important details such as delivery dates, quantities and location for the orders of goods or services.
The page also offers excessive. I'm sorry, the page also offers access to the distribution chart fields.
Split funding.
Click or tap the arrow to expand the line for editing.
Click or tap the schedule details tab.
Click or tap the distributions drop down to expand and display the accounting lines to split the funding for this line, click or tap the plus sign to add another distribution row.
Enter the additional chart filled information, insuring to adjust the percentage field to reflect the correct percentage for each line.
A hyperlink to the E Pro split funding job aid is available at the bottom of the slide.
Mass change. The default options box has been removed from the requisition defaults page.
This functionality is now managed through mass change changes made to this field on the mass change page will override the requisition defaults. The load values from defaults.
Option populates fields with information from the requisition.
Defaults a hyperlink to use the mass to a hyperlink to the using the mass change link.
Aid is available at the bottom of the slide.
To edit multiple lines on a requisition, select the desired lines by checking the check boxes in front of each line, or use the select all checkbox.
Click or tap the action drop down and select mass change on the edit lines shipping

accounting page.
Click, tap, click or tap the load values from defaults link to the to populate the fields that.
Start that over, I apologize.
On the edit line shipping accounting page, click or tap the value. The load values from defaults.
Click to populate the fields with values from the line defaults groupbox.
On the define requisition page, edit the fields as needed and click or tap the done button. When finished, a pop up window will appear asking if you want to retrofit the field changes.
To the selection, the to the selected requisition line schedules not a resource to this period.
Clicking or tapping OK or cancel is appropriate.
Find comments and attachments.
Click or tap the line comments icon to add comments for a specific line.
Line comments can be directed to the supplier and will display on the purchase order receive page. Receiving pages or voucher pages.
Select the appropriate check box for visibility.
Using the add attachment buttons to include supporting documentation with the requisition, requisition attachments allow requesters to communicate supplemental information and requirements to vendors, approvers, and other core users, and are always tied to the requisition after clicking or tapping the add attachment buttons.
The file attachment page will appear.
Click or tap the my device button to navigate to the desired file.
File and tap or click the open button to attach it to your line item.
The file will then display in the attachable table.
Click or tap the view button to display the attachment.
Attachments are permanently associated with the requisition and one source they carry over to the purchase order.
Attachments will be sent to the vendor when they are sent to the vendor. Checkbox is checked and Apo is dispatched via e-mail.
Submit and save.
The submit button saves the requisitions.
Assigned it a requisition ID and initiates the approval workflow.
A confirmation page will display and the requisition will be rooted to the to the

requisition amount approver.
Workload to their work list. The save button saves the requisition without initiating the workflow so that it may be edited again for the future.
The system will assign a requisite ID, but the confirmation page will not be displayed.
Confirmation page. The confirmation page appears after clicking or tapping the submit button.
It's a place it displays summary of the requisition information, including the requisition ID which is generated upon saving the requisition, click or tap the view approval chain button located at the bottom left of the requisition details box to see the approval status path.
Which the approve which is in the approver's workflow.
Click or tap the print preview.
Oops, sorry. Can you go back?
Thanks. Click or tap the print preview button at the top right of the confirmation page to view a printable version of the requisition. A pop up window will appear asking if you want to print the requisition with distribution details.
Click or tap yes or no to proceed with the printable view.
You can edit the requisition by clicking or tapping the edit requisition button to return to the my requisitions page. Click or tap my requisition's.
Please take note the state of Connecticut aspire.
Do a fully paperless environment. Please think twice before printing as the information you are about to print is ready readily available in core CT for easy access and reference.
Here are key takeaways. As you were shown earlier, core utilizes a three-step requisitioning process.
Define a requisition.
Add items and services and review and submit.
Comments can be rooted to the vendor with the purchase order displayed on the receipt or showed at the voucher.
Attachments can be included and sent to the supplier with purchase order dispatched through e-mail.
The confirmation page provides a 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.

And distributions can be assigned accordingly.
Here are the job aides.
Here are the job aides associated with creating a new requisition.
Before moving on to the next unit, do we have any questions?

RM **Reutter, Shanon M** 25:25
There's nothing in the chat so far.
Oh wait, there's a hand up. You have to type in the chat to be able to get any questions over to us.

RM **Richmond, Michele** 25:41
Just give it a couple seconds to have some questions put in the chat.
Not seeing any questions come in.
OK.
We'll move on if any questions happen to pop in the chat, we could just pause and we can answer those questions going forward.
OK.
Unit 2 managing requisitions in this unit, we will explore how to manage existing requisitions before key task using the fluid interface and discuss navigation changes.
Key task to be.
Task will be to familiarize yourself with the essential actions such as submitting, saving and tracking requisition status, as well as understanding how to navigate the updated fluid interface for a more streamline experience.
To access my requisitions using the fluid interface, first go to employee self-service, select core CT financials from the drop down menu. Click or tap on the E procurement tile and then click or tap on the manage requisitions tile.
My requisitions use the myrequisitions page. Once a requisition has been saved to edit, cancel and copy requisitions. You can also view the request Lifeline approvals as well as a printable version of your requisition.
My requisition defaults with requisitions found under your business unit and user ID.
Click or tap on the filter by button to edit the search criteria in my requisition.
The default fields are business unit, requester and the from to date fields. The date from and the date to always default to the Encompass to encompass the previous week. There are several request statuses options that can be selected.
To search, use the budget status field to search for requisition in budget error.

Actions click or tap, click or tap the action drop down list to see the available options for a particular requisition.
Click or tap cancel to cancel the requisition.
Other available options are copy, requisition, edit, requisition, view, approvals details and view print which options to have access to is determined by the roles you are assigned by your user ID security.
Details. The details page provides a summary of the requisition.
A visual requisition lifeline and a list of the line items included in the requisition.
Copy feature. This is a feature is specifically helpful for creating new requisitions based on previous orders.
Saving time by replicating all the line items, quantities and other relevant details from your original requisition. You can then modify and copy information as needed, such as updating quantities, changing delivery dates, or selecting different suppliers.
Before submitting the new requisition at the bottom of the slide, there is a hyperlink to the copy.
An existing requisition job aid.
Please note that punch aid requisitions cannot be copied.
Viewpoint the viewpoint action displays a principal version of the requisition.
The user will be prompted to choose whether or not to include distribution details.
Cancel the cancel action will cancel the requisition.
When choosing cancel, you'll be met with a prompt asking if you you're sure that you want to cancel this requisition.
Be careful because once you cancel the requisition, request state will be marked as cancelled and you will not be able to get the requisition back to an editable state.
Edit The edit action allows the user to modify an existing requisition. A pop up window will appear informing you that editing a requisition may start. The approval process may restart the approval process.
Click or tap OK to acknowledge this message, then click or tap check out to proceed.
To make edits to the copied requisition, click or tap the schedule details box button or the right arrow to navigate to the line details page.
Few approval a viewer approval action enables the user to see the current status of the requisition in the approval status at the bottom of the slide, there is a hyperlink to the review, approval history, job aid.
Here are some key points to keep in mind.
Click or tap the actions drop down list to select an action for the requisition you are

working on.
Details displayed in the requisition lifeline.
Copy copies the original requisition line detail encoding, except of course for punch out requisitions.
View Print will display a printable version of your requisition.
Cancel will bring up a pop up window confirming you wish to cancel the requisition.
That it allows you to edit most details of this requisition.
View approval displays who approve the requisition and what stage in the approval process the requisition is currently at.
These are the job aids associated with managing requisitions.
Before we move on, do we have any questions?

RM **Reutter, Shanon M** 32:54
Michelle, somebody message me and said that for some reason their chat is disabled.
So if anybody has any questions, they can ping me in teams and I can bring the questions forward to Michelle.

RM **Richmond, Michele** 33:11
That would be great, yes.
Did she give you a question with that?

RM **Reutter, Shanon M** 33:18
She had asked if the PDF of this was gonna be available and it definitely will be on the core website.

RM **Richmond, Michele** 33:21
Perfect and it will be.

RM **Reutter, Shanon M** 33:25
We'll review that at the end.

RM **Richmond, Michele** 33:29
If you happen to get anything else, Shannon, just feel free to interrupt me.

RM **Reutter, Shanon M** 33:33

OK.

Great. Thank you.

RM **Richmond, Michele** 33:42

You did 3 approvals in this unit.

We will cover the approval process during the unit.

I will guide you through the streamline and INTRUDIVE approval interface which is designed to enhance the efficiency and transparency of the approval workflow.

Key topics will include navigating the approval interface, understanding approval statuses, and manage and tracking approval effectively.

Approvals, navigation to navigate to approvals using the fluid interface, you will first navigate to employee self-service.

Select core CT financials from the drop down menu.

Click or tap the E procurement tile, then click or tap the approvals tile.

Approvals overview approvers can efficiently review requisitions.

View all relevant details and access approval options directly from the approval page.

The approvals process is.

Seamlessly integrated with with the overall requisition lifestyle, ensuring that all necessary documentation, budget checks and compliance steps are completely prior to approval.

Throughout this unit, we will explore how to navigate the approval screens, process requisitions efficiently, and manage common tasks such as adding comments and reviewing requisition history for complete audit trail.

The streamlined process.

Enhanced enhances visibility for approvers and ensures compliance with your organization's procurement policies.

Pending approvals on the appending approvals page, the user can see the count of the POS and requisitions currently pending approval, clicking or tapping on the requisition or purchase order will direct the user to that specific item for further review.

Osition approval 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 will find the options to push back, hold, and

request more information.
Approval chain clicking or tapping on the approval chain button displays the various steps in the approval process along with the current statuses.
At the bottom of the slide, you will find a hyperlink to the view PO approval history and view approval history job aides.
Approval line detail selecting a line displays the approval line detail page which shows the line detail and shipping information for the specific line item selected.
Clicking or tapping on the item under shipping information will bring up the distribution details.
View printable version, clicking or tapping on view printable version button brings up a printable version of the requisition.
Edit requisition, clicking or tapping Edit Requisition opens the edit requisition page, allowing the approver to make changes to the requisition.
Click or tap check out to proceed at the bottom of the slide there is a hyperlink to the approve requisitions. After editing job aid.
Click or tap the schedule date button to the right arrow to navigate to the line details page to make edits to this requisition.
Proof. Clicking or tapping approve prompts the user to enter the approver comments before clicking or tapping submit to approve the requisition.
Keep in mind that comments are not required for approvals.
A notification will appear on the pending approvals page and the requisition is no longer pending.
Clicking or tapping deny prompts the user to enter approver comments before clicking or tapping submit to deny the requisition.
Comments are required for denials.
A notification appears on the pending approvals page and the requisition is no longer pending.
More clicking or tapping more brings up additional options, including push back, hold and request For more information.
Comments are required on these functions.
Here are the job aids associated with approvals.
Before moving on to the next unit, does anyone have any questions?

RM **Reutter, Shanon M** 38:53
Do you have a previous question?

OK, so you stated that the search by contract ID field has been removed.
Can you tell me where we would find that function going forward with the new core?

RM **Richmond, Michele** 39:07
Say the beginning part again.

RM **Reutter, Shanon M** 39:10
The search by contract ID field has been removed.

RM **Richmond, Michele** 39:17
Search by contract ID field.
Justin.
I don't know if you can type in the chat.
The search by contract is that in catalog that they're asking.

RM **Reutter, Shanon M** 39:34
Umm.
It was at the very beginning of the training session.

RM **Richmond, Michele** 39:42
OK, we'll take that one down and we'll get back to you on that one.

RM **Reutter, Shanon M** 39:45
OK.

RM **Richmond, Michele** 39:47
Write it down.

RM **Reutter, Shanon M** 39:49
Is there a start a new path in the approval feature?

RM **Richmond, Michele** 39:57
Yes, yes there is.
You can add.

You can hit the plus sign to add more approvers after the first approver.
Yes, same as it has always been. That hasn't changed.

Reutter, Shanon M 40:09
And then another question will be will a video be available?
And yes, there will be posted on the Corsi Team Modernization page.
OK, that looks like that's it for now.

Richmond, Michele 40:33
Unit for my receipts.
If this unit I'd in this unit I'll be covering creating and managing receipts in my receipts using the new fluid UI. I'll highlight navigation changes and demonstrate how receipts are managed with the new fluid interface receipt overview. Next slide, I'm sorry.
Rosie overview receipts are required for all purchase orders receiving can be performed in both the purchasing and a procurement modules in order to receive APO, the PO status must be dispatched and you will need to have either a general or cashual receiver role.
Casual receivers are limited to receive dispatched purchase orders that originated from requisitions that they have created.
To navigate to add update receipts using Fluid Interface, first navigate to employee self-service and click on core CT financials from the drop down menu.
Click or tap the E procurement tile and then click or tap add update receipt tile.
Add update receipts to add a receipt, click or tap the add new receipt hyperlink.
To update a receipt, search the PO you wish to receive, making sure to delete the default ship to values before clicking or tapping the search button.
After searching by Poid, 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 check box.
The receipt number will be automatically generated.
You may also click or tap the find an existing value button to search for an existing receipt.
Here the user inputs information into the search criteria fields to locate and update the existing purchase order.
On the receiving page, enter information such as the receipt, quantity, shipping

details, inspection status if applicable.
You may also need to update information like delivery dates or receiving locations.
Click or tap the save button to complete the process and generate the receipt record in the system.
Find an existing value.
Enter the receipt number, purchase order number or supplier number into the corresponding search fields.
Review your search and select the relevant receipt to review or update.
To access the my receipt page, first select the core CT financials from the drop down menu.
Click or tap the E procurement tile and then click or tap the my receipt style.
High receipts on the my receipts page. You can view activity receipts that you've created.
The search criteria filters adjust the results based on your security and permissions.
You have the following options activities.
Delivery information and edit receipts.
Please know that the chart fields and manual close landed cost icons are displayed but are currently inactive functions.
Maintain activity in comments on the maintain activity. In comments page you have 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. You may add or update delivery information under the delivery location and the location comments tab as needed.
Edit receipts clicking or tapping the edit receipt icon directs you to the add update receipts page where you can make modifications to the selected receipt.
To recap, receiving as required for all requisitions.
To receive an E Pro to receive in the E procurement module, you must have created the requisition and the associated purchase order must be dispatched. The general or casual receiver role is required to receive a receipt is created to accept items or services received. Optional information for the.
Receipt of items such as.
Comments and penalty information can be entered.
The receipt is then saved and the vendor payment process continues to the accounts payable module.

If the final receipt quantity is not going to match the PO quantity, don't create a receipt first, create a change order to the purchase order in order for it to match the received quantity.
The receipt date is the date the items are physically received.
It is not the date that the receipt is created in core.
Edit The receipt date field if appropriate.
You should now be familiar with creating new requisitions, managing existing requisitions, creating new receipts, and manage existing receipts.
Does anyone have any questions you can enter them into the chat or you can send a team's message to Shannon.

RM **Reutter, Shanon M** 46:41
OK.
We have one.
Will our favorite links shortcuts still take us to the appropriate page or will we have to set up new the favorites link again?

RM **Richmond, Michele** 46:52
We go ahead.

RM **Reutter, Shanon M** 46:52
Go ahead, Michele.

RM **Richmond, Michele** 46:53
No, no, no.
Go ahead, you can take it.

RM **Reutter, Shanon M** 46:57
The favorite? Your favorites will not copy over, so you'll have to set up new links to your favorites page pages.

RM **Richmond, Michele** 47:04
And we do recommend before we go live, take a screenshot of your favor page so it'll be easier for you to re enter them.

RM **Reutter, Shanon M** 47:11

OK.

Next question, will there be upk set up where you can try and follow along these steps on the requisitions and receipts in the receipt modules.

RM **Richmond, Michele** 47:21

Unfortunately, we are no longer doing ups.

RM **Reutter, Shanon M** 47:26

And then is there a sandbox for practice?

RM **Richmond, Michele** 47:29

Or is not.

RM **Reutter, Shanon M** 47:31

And then can we get a copy of this recording?

RM **Richmond, Michele** 47:34

Yes, there will be.

This will be posted on the modernization page.

RM **Reutter, Shanon M** 47:40

Will you be able to view other employees receipts that they entered?

RM **Richmond, Michele** 47:47

Yes, it it's gonna act the same way as it does today.

So if you have access to look at their receipts today, then you will have access in the new system.

RM **Reutter, Shanon M** 47:58

OK.

What is the difference of holding a wreck and pushback?

RM **Richmond, Michele** 48:04

Yeah, that's a great question.
So today, the way that everybody's used to it is hold.
There is not actually there.
There's three hold, push back and request for For more information.
We'll start with push back.
So push back happens when you're pushing it back to the previous approver.
So let's say Shannon approved it first and I'm the 2nd approver. If I if Shannon approves it, I can then push it back to Shannon and it stops with the first approver.
Request For more information is you receive a requisition for approval and you need more information, whether it be you're questioning the price, what they're purchasing, their coding, whatever it may be, you can push it back to them.
Put a comment in which is a required field, and in that comment you're going to specify what information you're looking for from that requester.
Now hold is when you are the approver and you're holding it for.
A specific reason.
And you don't necessarily need any information from that user.
It's just being put on hold.
Perfect example is it's close to the next quarter and you know the funds aren't in yet and you know if you approve it, it's just going to go into error.
So you're going to hold it until the budget is available. So those are three are are very different right now.
Hold works as if you want to put it on hold.
Or you're requesting more information, so we've just separated those two out.
Just to make it a bit more easier and clearer for the users and approvers.
Hopefully that answered that question, maybe a little more than you asked.
Any other questions?

RM **Reutter, Shanon M** 50:00
OK. How will we be notified if, oops, hold on. It just went away on me.

RM **Richmond, Michele** 50:06
It's OK.

RM **Reutter, Shanon M** 50:08
How will we be notified if more information is needed?

RM **Richmond, Michele** 50:12

Yeah. So in the new system, instead of having a work list, it's a notification bell which is in the upper right hand corner.

It's just like a little bell right up on that corner and you'll have a little tiny greenish white dot that pops up showing that you have either an alert or an action in your in your notification bell area.

Which is like your work list today. When you click on that, it's going to show your actions.

And it's gonna show your alerts.

So if somebody put something on hold, you're gonna get an action. If somebody denies something, you're gonna get an alert letting you know that it was denied.

So you will be getting notifications as the as the user submitting the requisition.

You'll get alerts anytime somebody approves it, denies it, puts it on hold.

Request for information. You'll get those alerts every time.

RM **Reutter, Shanon M** 51:11

OK.

So if we request more information, who would get the message in?

Who would get the message?

The epro requester.

RM **Richmond, Michele** 51:20

Yes.

That's going to go right back to that requester. Yep.

RM **Reutter, Shanon M** 51:40

OK.

That looks like that's it for now.

RM **Richmond, Michele** 51:52

Well, congratulations. You have completed the fluid E procurement training course.

When you have a moment, please complete the training Evaluation course survey.

You can review the course training materials by following the link below. For more information regarding this course CT modernization project, you can use the link

below or visit state dot CT dot US and search for the core TCT modernization project.
And that is the end of our presentation.

RM **Reutter, Shanon M** 52:30
I am going to post the link to the survey in the chat.
Just give me one second.

RM **Richmond, Michele** 52:44
Up with that, if anyone has any other questions, please feel free to ask.

RM **Reutter, Shanon M** 52:54
OK. And we did add a new slide, if anybody has any questions.
At all. You can log a footprints ticket and the footprints tickets route directly to the teams.
If you do not have access to footprints, you can send an e-mail to the readiness mailbox at readiness@ct.gov.
So if anybody has any questions, you can also do that.

RM **Richmond, Michele** 53:19
And just putting the readiness e-mail in the chat.
I don't see that slide that you were just mentioning.

RM **Reutter, Shanon M** 53:29
OK.
I'm on it right now.

RM **Richmond, Michele** 53:35
I'm on slide 96.
Thank you.

RM **Reutter, Shanon M** 53:43
It's actually slide 95.

RM **Richmond, Michele** 53:46
Oh.

There it is.
It was before we skipped right over it. I apologized.

RM **Reutter, Shanon M** 53:56
Can we get a copy of the slides?
They will be posted on the course ET modernization page.
If you go to the core CT website on the left hand side, you'll see modernization at the bottom. If you click on that, that'll bring you to another page and you'll be able to click on the trainings right where you registered for the trainings.
You'll see all the the recordings, the transcript, everything will be posted there shortly after the training.

RM **Richmond, Michele** 54:41
If we have no further, oh, somebody has their hand up, you'll have to put your question in the chat or ping Shannon.
Have a question?
We we everybody's permanently muted on this chat, so we can't have you speak.
We would have to put it in the chat.
OK, if there's no further questions, this concludes the presentation and we're all set.
Have a great day everyone.

Braga, Donna stopped transcription