# Transcript

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PJ **Pinette, Justin** 0:22

Welcome to Epro 4CT staff training guide to the fluid changes that you guys are going to see in E procurement in a few weeks.
During this course, you put your cell phone on silent or vibrate and remain engaged.
Questions can be asked at the end of each unit in this course, we'll be covering the new upgrades to PeopleSoft and how they will affect E procurement processes.
Name's Justin panetti. And I'll be your trainer.
I'll be presenting the course content and taking questions at the end of each unit.
We also 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 in the meeting chat. You guys won't have microphone, so you won't be able to speak. But if you have any questions, just throw them right in the the chat for the meeting.
Getting right in there. Benefits of fluid user interface.
A few of the benefits of the new Fluid user 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, all within the new fluid UI for epro.
And here's today's agenda.
Unit 1 creating a new requisition. In this unit, we will explore the process of creating a new rec in the updated fluid. Uii will discuss navigational changes, compare revised pages, and how to provide an overview of the workflow processes that take place once requisitions are submitted.
Or utilizes a three-step requisitioning process.
One define requisition 2, add items and services and three review and submit.
And here is a look at the brand new fluid user interface. I've highlighted some of the new tiles you'll be using for eprotasks, including the EPR tile approvals, tile, create requisition tile, manage requisitions, tile, my receipts, tile, and add, update receipts, tile.

And here are some examples of one you would use an E Pro wreck when selecting from the state catalog when buying office supplies via punch out when submitting special requests or when submitting ITD 10 Dash bid TSR or PSAPOS requisition types.
Create a new requisition.
Navigate to employee self-service.
Select core CT financials from the drop down menu.
Click or tap the EPR tile and then click or tap the create requisition tile.
Acquisition 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 in the chart field coding which will be applied to each line of your requisition. If ordering from the catalogue are 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 fields one section if ordering from the catalogue or via punch out.
And will override any different value you enter into the defaults.
The distribution chart fields are now displayed in three separate tabs.
Chart fields 1-2 and three use the show all tab to display all the fields in the accounting defaults on the same page. If the items are inventory items, click or tap on the details tab to enter your inventory business unit. If the items are assets, click or.
Tap on the Asset Information tab and enter your asset management business unit and your IZ user ID.
My apologies.
Please take note that the default options box previously found between the header and line defaults has been removed.
This is now managed through the mass change process, which we will cover later.
Acquisition 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 hyperlinks to the various job aids for the different requisition types.
And here are the different types of requisitions.
Itd 10, which is for purchasing it items or services desk bed, which is used to initiate

the start of a bid that is not on contract or replaces an expiring contract.
TSRMACR are for telecommunication moves, ads, changes and repairs.
Tsr equipment are for telecom equipment.
PSA or for personal service agreements, PO is for purchase of service contracts.
And Rex will cover most other acquisitions.
Each rec 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 buyer.
At the bottom there is a hyperlink to the defining requisition, obligations, job aid.
Distribution defaults here. You will find distribution defaults and chart fields 1-2 and three.
Chart Field One includes the input fields, percent location, GL unit and account chart fields too.
Contains fund, Department, CID program and budget reference chart Field 3 features PC business unit, project activity, source type.
Category and sub category at the bottom you'll find a hyperlink to the modifying requisition defaults job aid.
The details tab includes input fields for inventory, unit, budget, date, and stat.
The Asset Information tab contains input fields for asset management, business unit, profile ID, capitalize cost type, and description at the bottom of the page, you'll notice there's a hyperlink to the modifying requisition defaults. Job Ed.
Create requisition.
Notice the navigation collection on the left side of the create requisition page where you will see the following options, catalog time and material web suppliers variable cost, service, special requests, templates, fixed cost, service and favorites.
Catalog search when you click or tap catalog, you will 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 refined the search results will be.
Avoid using the search name field. It's important to note that Oracle has removed the search by contract ID field.
This is the advanced search page with pads entered into the description field.
Clicking or taping search displays a search result of all the catalog items containing pads in their descriptions.
Catalog click or tap the right arrow to view item details and click or tap add to cart to

include items in the shopping cart. At the bottom is a hyperlink to the Adam, adding items to a requisition using search job aid.
Always remember to create requisitions for a single supplier only.
Item details the item details page includes a long description of the item which can help to determine if the item that you're 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 items CM number.
Enter the desired quantity, then click or tap the add button to include the items in your shopping cart with the new persistent cart functionality, you can add items to your cart, save them, and return later to complete your purchase.
Are there any questions about contract pricing in the catalog, contact a contract specialist, specialist, ADAS procurement?
Web suppliers to purchase an item from a web supplier, navigate to web suppliers and select a vendor.
You can then use the vendor site to search for an item and add it to your cart. Once the item is added to your cart, the process functions exactly the same as if you had added it through the catalog.
Clicking or tapping continues to check out on the vendor site.
Redirects you back to the core fluid checkout page.
Special requests 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 vendor ID and unit of measure, are required in order to facilitate accurate processing, you can.
Determine which fields are required by looking for an asterisk preceding the field name.
You can choose to share additional information by utilizing the comment text field.
And selecting where you'd like that information to be shown, whether it's to the supplier, 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, contractors hired to repair an electrical panel for an accrete upon total price of $1500.
Diamond materials use the timing materials 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 that the requisition is created. For example, for example, a plumber is hired to repair a broken water he.
At an agency, the plumber charges $150.00 per hour, with the job expected to take 4 hours, a new part costing $75.00 is also required for the repair.
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 cost is not fixed.
A good example would be troubleshooting computer issues at a rate of $125 per hour.
Templates use the add to template 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.
Access templates from the templates tab on the Create requisition page to add a template to a requisition, select it and click or tap add on the template tab.
Pricing will update automatically with new catalog requisitions.
Inactive items won't be included in line quantities on the checkout page.
The 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 and 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 a requisition, edit the quantity and click or tap add.
You can group favorite items by selecting the appropriate check boxes.
Clicking or tapping add to favorites 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 new catalog pricing.
A hyperlink to the adding favorites to groups. 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 as you add items to take advantage of the persistent cart functionality to save your progress and return later to complete your purchase. Even if the CART icon shows A0, always click or tap it to check for any unneeded items left from a.
Previous session or requisition?
This is a known Oracle bug.
Checking out click or tap the checkout button to access your requisition summary justification, comments, and requisition lines.
Overview Any lines added to the requisition will display in the requisition lines of review box. Clicking or taping the right arrow will expand each line for reviewing and editing.
Find details. Click or tap the line details tab to access the line details page.
All information on this page defaults automatically. Each requisition should have one buyer and the purchasing authority will default to contracts.
The contract ID will automatically populate for catalog items, but it must be entered for special request with the purchasing authority of contract.
The requisition cannot be saved without a contract ID if the purchasing authority is set to contracts.
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.
You can specify important details such as delivery dates, quantities and locations for the ordered goods or services. This 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 dropdown 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 field information, ensuring to adjust the percent 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.
Ask change the default options box has been removed from the requisition defaults page.
This functionality is now managed through mass change changes made to fields on the mass change page will override the requisition.
Defaults the load values from default option populates fields with information from the requisition.
Defaults a hyperlink to the using the mass change link.
Job aid is available at the bottom of the slide.
Apologies 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 actions drop down and select mass change on the edit lines shipping accounting page.
Click or tap the load values from defaults link 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 pop up window will appear.
Asking if you want to retrofit field changes to the selected requisition lines or schedules not already sourced.
Apo.
Click or tap OK or cancel as appropriate.
Line 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. Receiving pages or voucher pages.
Select the appropriate check boxes for visibility.
Here's the add attachments button 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 attachments button.
The file attachment page will appear.
Click or tap the my device button to navigate to the desired.
File highlight the file and click or tap the open button to attach it to your line item.
The file will then display in the attachment table.

Click your tab, click or tap the view button to display the attachment.
Attachments are permanently associated with requisitions in one source they carry over to the purchase orders.
Attachments will be sent to the vendor when the when the send to vendor checkbox is checked and Apo is dispatched via e-mail.
Submit and save.
The submit button saves the requisition, assigns it a requisition ID and initiates approval workflow.
A confirmation page will display and the requisition will be routed to the rec amount approver 1 worklist.
Save button saves the requisition without initiating the approval workflow, so that it may be edited again in the future.
The system will assign a REC ID, but the confirmation page will not be displayed.
Confirmation page.
The confirmation page appears after clicking or tapping the submit button.
It displays summary requisition information, including the requisition ID which 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 with the approvers. In the workflow, 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 defaults.
I'm sorry, distribution details.
Click or tap yes or no to proceed to 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 requisitions.
Please take note the state of Connecticut aspires to a fully paperless environment.
Please think twice before printing, as the information you're about to print is readily available in core for easy access.
Reference.
And here are your key takeaways. As you were showing earlier, core utilizes a three-step requisitioning process define rec add items and services and review and submit.
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 dispatched through e-mail.
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.
And here is a list of the job aids associated with creating a new requisition.
So before moving on to the next unit, are there any questions?

GD **Guarino, Dustin** 24:01
Right now we're all clear.
So I guess you're good to go.

PJ **Pinette, Justin** 24:04
OK.
Unit 2 manage requisitions in this unit, we will explore how to manage existing requisitions.
Perform key tasks using the fluid interface and discuss navigation changes.
Key tasks will be to familiarize yourself with essential actions such as submitting, saving and tracking requisition status, as well as understand how to navigate the updated fluid.
Interface for a more streamlined experience.
Access my requisitions using the fluid UI. First go to employee self-service, select core CT financials from the drop down menu, then click or tap on the E procurement tile and then click or tap 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 requisitions defaults with requisitions found under your business unit and user ID.
Click or tap the filter by button to edit the search criteria. In my requisitions the defaulted fields are business units.
Requester and the from and to date fields.
The date from and date to always default to encompass the previous week.
Are several request status options that can be selected to search.

Use the budget status field to search for requisitions in budget error.
Actions 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 you have access to is determined by the roles that are assigned to your user ID by 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.
A 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 pertinent details from the original requisition.
You can then modify any copied 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, punch out requisitions cannot be copied.
View print The View print action displays a printable 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're sure you want to cancel the requisition.
Be careful, because once canceled the requisitions, request date 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 or requisition may restart the approval process.
Click or tap OK to acknowledge this message, then click or tap check out to proceed.
Make edits to the copied requisition.
Click or tap the schedule details button or the right arrow to navigate to the line details page.
New approval.

The view approval action enables the user to see the current status of the requisition in the approval process at the bottom of the slide, there is a hyperlink to the review, approval history, job aid.
And 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.
Tails displays the requisition.
Lifeline copy copies the original requisition line details 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.
Edit allows you to edit most details of a requisition.
And 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.
But before we move on to Unit 3, are there any questions?

GD **Guarino, Dustin** 30:17
Looks like you're all clear.

PJ **Pinette, Justin** 30:19
OK.
I'll be shy guys.
Unit 3 approvals.
In this unit, we will cover the approvals process during this unit. I will guide you through the streamlined and intuitive approvals interface, which is designed to enhance the efficiency and transparency of the approval workflow.
Key topics are going to include navigating the approvals interface, understanding approval statuses, and managing and tracking approvals effectively.
Navigate to approvals using the fluid UI. You will first navigate to employee self-service.
Select core CT financials from the drop down menu.
Click or tap the EPR tile and then click or tap the approval style.
Of his overview, Approvers can efficiently review requisitions.
View all relevant details and access approval options directly from the approvals

page. The approvals process is seamlessly integrated with the overall requisition lifecycle, ensuring that all necessary documentation, budget checks and compliance steps are completed 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 a complete audit trail.
This streamline process enhances visibility for approvers and ensures compliance with your organization's procurement policies.
Pending approvals on the pending approvals page, the user can see the count of P OS and requisitions currently pending approval, clicking or tapping on a requisition or purchase order will direct the user to that specific item for further review.
Acquisition 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'll find options for push back, hold and request more information.
Approval chain clicking or tapping the approval chain button displays the various steps in the approval process along with their current statuses at the bottom of the slide you will find hyperlinks to the view PO approval history and review approval history.
Job aids.
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 the 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 approving requisition. After editing job aid.
Click or tap the schedule details button or the right arrow to navigate to the line details page to make edits to the requisition.
Arove clicking or tapping approve prompts the user to enter 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.
Nye, 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.
Push back, hold and request information.
Comments are required for all three of these functions.
And here we have the job aids associated with approvals.
Again, before moving on, does anybody have any questions?

GD **Guarino, Dustin** 35:59
We're still good to go. So remember, if you have questions, put them in the chat and we'll get to them.

PJ **Pinette, Justin** 36:11
Minute for my receipts.
In this unit, I'll be covering creating and managing receipts in my receipts using the new fluid UI. I'll highlight navigational changes and demonstrate how receipts are managed with the fluid interface.
Seats overview receipts are required for all purchase orders.
Receiving can be performed in both the purchasing and eepro modules in order to receive APO, the PO status must be dispatched and you need to have either the general or casual receiver role. Casual receivers are limited to receiving dispatch POS that originate from requisitions that they.
Created.
Navigate to add update receipts using the fluid interface.
First navigate to employee self-service.
Select core CT financials from the drop down menu.
Click or tap the EPR tile and then click or tap the add update receipt style.
Add update receipts to add a receipt, click or tap the add new receipt hyperlink to update a receipt. Search for the Po you wish to receive, making sure to delete the defaulted ship to value 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 an existing purchase order.
Receiving page enter information such as the receipt, quantity, shipping details and 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 ID into the corresponding search fields.
Review the search results and select the relevant receipt to view or update.
Access the My receipts page first.
Select course financials from the drop down menu.
Click or tap the EPR tile, then click or tap the my receipts tile.
Seats on the My receipts page you can view.
You've created the search criteria filters.
Adjust the results based on your security permissions. You have the following options, activities, delivery info and edit receipts.
Please note that the chart fields and manual close landed cost icons are displayed but are currently inactive functions.
Maintain activity and comments on the main 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 tabs as needed.
Get receipts, clicking or tapping the edit receipts icon directs you to the add update receipts page where you can make modifications to the selected receipt.
To recap, receiving is a requirement for all requisitions.
To receive in the E Pro module, you must have created the requisition and the

associated. The Associated Po must be dispatched. The general or casual receiver role is required to receive.
The 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 in the accounts payable module. If the final receipt quantity is not going.
To match the PO quantity, do not create a receipt. First create a change order in the PO in order to match the received quantity.
The receipt date is the date the items were physically received.
It is not the date the receipt is created in core.
Edit The receipt date field if appropriate.
Oh, OK I my apologies.
I think I got a little loud to sync there.
Yeah. OK.
You should now be familiar with creating new requisitions, managing existing requisitions, creating new receipts, and managing existing receipts.
And questions about Unit 4.

GD **Guarino, Dustin** 42:42
Any questions from anyone?
Put them in the chat.
I know you guys can't talk, so if you don't put them in here, you have questions afterwards, you could send them to the readiness mailbox.
Well, right now.

PJ **Pinette, Justin** 42:57
I may not be working, yeah.

GD **Guarino, Dustin** 42:59
But.
Yeah, for those that it's not working, you can send your questions to its readiness@ct.gov.
And we'll get the questions answered there.

PJ **Pinette, Justin** 43:12

Unfortunately, some agencies have security set up so they're not able to participate in some chats, unfortunately.
Alright then.
Well, congratulations. You've completed the fluid E Pro training course. When you have a moment, please complete the training Evaluation course survey.
You can review course training materials by following the the link here and For more information regarding the core CT modernization project, you can use the link below or visit state dot CT dot US and search for core CT modernization project.
Thanks for coming guys.
And again, if you have any questions or anything like that.
Readiness@ct.gov.
And we'll get you taken care of.

GD **Guarino, Dustin** 44:13
If you can't do the the link for the survey, if you can fill it out please is in the chat. If you can access it.

◉ stopped transcription