Transcript

October 10, 2024, 1:05PM

Braga, Donna started transcription

Pinette, Justin 1:22

Good morning, everybody.

My name is Justin Pinette and I will be your trainer today.

Flag.

We asked that 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 will be covering the new upgrades to PeopleSoft and how they will affect E procurement processes.

Today I will be your trainer.

I'll be presenting 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 questions directly in the meeting chat, should you have any.

They're jumping right into it.

A few of the benefits of the new Fluid user interface are it's easier, more intuitive to use. Navigation is easier.

Here it also caters to various users.

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.

Where is 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 UI. I'll discuss navigational changes, compare revised pages, and I will provide an overview of the workflow processes that take place once requisitions are submitted.

'Cause, I'm sure you're familiar core utilizes a three-step requisitioning process.

First define the requisition.

Two add items and services and three review and submit.

Here's your first look at the brand new fluid user interface.
I've highlighted some of the new tiles you'll be using for key E protests, including the E procurement tile approvals, tile, create requisition, tile manage requisitions, tile, my receipts tile, and the add update receipts tile.
Are some examples of when you would use an E Pro requisition.
When selecting from the state catalog when buying office supplies via punch out, when submitting special requests or when submitting ITD 10 DAS bid TSR or PSAPOS requisition types.
To create a new requisition, navigate to employee self-service, select core CT financials from the drop down menu.
Click or tap the E procurement tile and then click or tap the 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 the due date and the chart field coding which will be applied to each line of your requisition.
If ordering from the catalogue 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 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.
Start 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 user ID.
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.
Requisition 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.

Listed here are the different types of requisitions.
Itd 10, which is for purchasing it items or services DAS bid, 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.
Psr equip are for telecommunications equipment.
PSA are for personal service agreements.
Po is for a purchase of service contract.
And Rex covers most other requisitions.
Each requisition type has a distinct hyperlink that appears below the drop down menu, directing you to custom pages that also require input.
Each requisition should have one designated by.
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.
Start field too contains fund department.
Sid program and budget reference.
Chart Field 3 features PC business unit, project activity, source type category and subcategory. At the bottom you'll find a hyperlink to the modifying requisition defaults job aid.
Can everybody hear OK or is it too low?

RM **Richmond, Michele** 9:08
I can hear you fine, but I did just see that in the chat.

PJ **Pinette, Justin** 9:12
Yeah.

RM **Richmond, Michele** 9:15
Jennifer, maybe try adjusting your value.

PJ **Pinette, Justin** 9:24
I'm gonna continue.
Let us know if if there's still an issue.
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 see a hyperlink to the modifying requisition defaults job aid.
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 materials web suppliers, variable cost, service, special requests, templates, fixed cost, service 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 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 tapping search displays a search result of all 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 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 item CM number.
Enter the desired quantity, then click or tap the add button to include the items in your shopping cart.
The new persistent cart functionality you can add items to your cart, save them and return later to complete your purchase for any questions about contract pricing in the catalog, contact a contract specialist at DAS 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 catalogue.

Clicking or tapping continue 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, a contractor is hired to repair an electrical panel for an agreed upon total price of $1500.
Materials use the time and 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 you create the requisition.
For example, a plumber is hired to repair a broken water heater at an agency.
The plumber charges $150.00 per hour with the job expected to take four 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.

To delete templates, click or tap manage personal templates.
Select the template and then 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.
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.
Take advantage of the persistent cart functionality to save your progress and return later to complete your purchase. Even if the CART icon shows a 0.
Always clip, click or tap it to check for any unneeded items left from a previous session or requisition.
This is a known.
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 overview box. Clicking or tapping 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 requests with the 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 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 drop down to expand and display the accounting lines.
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.
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 fields 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 the using the mass change link. Job aid is available at the bottom of the slide.
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 group box on the define requisition page.
At 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 field changes to the selected requisition.
My apologies asking if you want to retrofit field changes to the selected requisition lines schedules not already source to POS.
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.
Use the add attachments button to include supporting documentation with the requisition.
Acquisition 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 or tap the view button to display the attachment.
Attachments are permanently associated with requisitions and once sourced, they carry over to the purchase orders.
Attachments will be sent to the vendor when the send to vendor check box 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.
The save button saves the requisition without initiating the 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 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.
Acquisition.
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 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 and reference.
Here are your key takeaways, as you were shown earlier, core utilizes a three-step requisitioning process.
1.
Define requisition 2, add items and services and three.
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.
Here are the job aides associated with creating a new requisition.
Before moving on to the next unit, are there any questions?

BS **Bucchere, Shaun** 26:25
OK, Justin there.

RM **Richmond, Michele** 26:25
I'm not in the chat.

BS **Bucchere, Shaun** 26:25

No. Yep. Nothing in the chat.

PJ **Pinette, Justin** 26:28

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.

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 eprotile 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 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 unit, requester and the from to date fields.

The date from and date to always default to encompass the previous week.

There 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.

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.
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 that 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 cancelled the requisitions 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 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.
View 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.
Here are some key points to keep in mind.
Click or tap the actions dropdown 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, 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 in the

approval process that we're requisition is currently at.
These are the job aides associated with managing requisitions.
Before we move on, are there any questions?

BS **Bucchere, Shaun** 32:53
No questions in the chat.

PJ **Pinette, Justin** 32:57
Thanks Sean.

BS **Bucchere, Shaun** 32:58
Somebody does have their hand raised though. If you can put your question in the chat.
Couple people have their hands raised.
You won't be able to use your microphone, but you can.
You should be able to type in the chat if you have questions.
Do you want me to? OK.

RM **Richmond, Michele** 33:32
While we're waiting for those questions, if I can just point out there are job aides that are listed on this presentation that you can click on, but they are not yet ready and won't be ready until go live.

PJ **Pinette, Justin** 33:33
Ah, there we go.

RM **Richmond, Michele** 33:45
So there's no point to click on those job aids.
They're not going to bring you anywhere.
At this time, they will later.
Thank you.

BS **Bucchere, Shaun** 33:57
OK.

So we do have one question.
Can we manage others? Rex like we can now?

PJ **Pinette, Justin** 34:04
I don't believe that's changed.
I think you you still have the same access inability that you have today.

RM **Richmond, Michele** 34:11
That's correct. Yep.

PJ **Pinette, Justin** 34:20
This might just be Aaron hands.
Oh no.

BS **Bucchere, Shaun** 34:24
Can we leave a requisition in open status if we have to put it on hold?

PJ **Pinette, Justin** 34:30
Yes, absolutely.

BS **Bucchere, Shaun** 34:44
OK.
We'll move on.

PJ **Pinette, Justin** 34:47
OK.
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 will include navigating the approvals, interface, understanding approval statuses, and managing and tracking approvals effectively.
Approvals, navigation to navigate to approvals using the fluid interface, you'll first navigate to employee self-service.

Select core CT financials from the drop down menu, and then click or tap the eprotile. Then click or tap the approval style.
Approvals 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 life cycle, 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 requisitions.
For a complete audit trail.
The streamlined 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.
Requisition 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 information.
Approval chain clicking or tap in 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 taping the view printable version button brings up a printable version of the requisition.
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's 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.
Prove 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.
Deny 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 in the requisition is no longer pending.
More clicking or tapping more brings up additional options, including push back, hold and request information.
Comments are required for these functions.
Here you have the job aids associated with approvals.
Any questions about approvals?

BS **Bucchere, Shaun** 40:42
We have one question. If a manager edits our requisition, is it noted somewhere that it wasn't the originator that changed a quantity?

PJ **Pinette, Justin** 40:54
Michelle, correct me if I'm wrong, but I don't believe there's anything within the the actual.
Page that will show you.
I think that's only a table level.

RM **Richmond, Michele** 41:06
I will have to look into that one and get back.
I know with purchase orders that is able to track, but I will check for requisition and get back to you.

PJ **Pinette, Justin** 41:15

Thank you.

Oh.

Is not available to everyone.

BS **Bucchere, Shaun** 41:30

Hmm.

PJ **Pinette, Justin** 41:32

That's odd.

Oh.

Some people in this chat are outside your organization.

It's possible they have message related policies that will apply to the chat that could be doing it.

BS **Bucchere, Shaun** 41:49

OK.

RM **Richmond, Michele** 41:53

Also could be if they was forwarded to them maybe.

PJ **Pinette, Justin** 41:59

It's teams. Anything's possible.

RM **Reutter, Shanon M** 42:03

I can answer that question.

Sometimes it's blocked by.

Their security on their PCs.

PJ **Pinette, Justin** 42:13

That's a problem.

RM **Reutter, Shanon M** 42:14

So if they want to.

Join on their phone. They can.
Then they should be then be able to chat.

RM **Richmond, Michele** 42:25
That's odd.
Jerry Lynn from Dis, who we talked on teams all the time. She has no access either.

PJ **Pinette, Justin** 42:33
That's weird.

RM **Reutter, Shanon M** 42:41
If they have any questions that need to be answered, they can also e-mail the readiness mailbox and we can get back to them 'cause. There will be a question and answer page posted to the website after this training.

PJ **Pinette, Justin** 42:55
Can you throw that that e-mail address into the meeting chat for them?

RM **Reutter, Shanon M** 43:01
Will do.

PJ **Pinette, Justin** 43:02
Thank you.
Yeah, yeah, it looks like, yeah, there's. Yeah.
We'll have to look into that.
Any other questions that can make it through?
OK.
Unit 4.
My receipts.
This unit.
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.
Receipts overview receipts are required for all purchase orders.
Receiving can be performed in both the purchasing and E procurement 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 and select core CT financials from the drop down menu.

Click or tap the E procurement tile, then click or tap the add update receipts tile.

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 checkbox. 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.

On the 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.

Can then review your search results and select the relevant receipt to view or update.

To access the my receipts page, first select core CT financials from the drop down menu.

Click or tap the E procurement tile, then click or tap the my receipts tile.

My receipt on the my receipts page. You can view the active receipts that you have created. The search criteria filters adjust the results based on your security permissions.

You have the following options, activities, delivery information and edit receipts.
Please note that the chart fields and manual close landed cost icons are displayed.
But they are currently inactive functions.
Maintain activity and 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 tabs as needed.
Edit 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 required for all requisitions to receive in the E procurement module.
You must have created the requisition and the associated PO 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.
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 on 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.
You should now be familiar with creating new requisitions, managing existing requisitions, creating new receipts, and managing existing receipts.
Are there any questions about receiving?
I forget the exact date.
November was it 25th, I believe.
When is the new software going live?

BS **Bucchere, Shaun** 50:25
Yes.

PJ **Pinette, Justin** 50:27
Yeah, so so our go live date is as of right now, November 25th.

BS **Bucchere, Shaun** 50:46
There's another one.
Does mass change allow us to change purchasing authority also?

PJ **Pinette, Justin** 50:54
So that's a good question.
Is that on there?
I don't think it is.
Michelle, do you know?

RM **Richmond, Michele** 51:03
I do not.

PJ **Pinette, Justin** 51:05
'Cause it's a custom field.
I think it's only it's. I don't think it's included in that mass change event.

RM **Richmond, Michele** 51:12
I don't believe it is either.

PJ **Pinette, Justin** 51:13
Yeah.

RM **Richmond, Michele** 51:15
We can double check that and get back to you as well.
I apologize.
Our E Pro lead is out this week, so we're just covering for her, but we'll definitely get these questions answered and right back to you.

Pinette, Justin 51:41

All right.

Well, congratulations. You've 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 the course CT modernization project, you can use the link below or visit state dot CT dot US and search for core CT modernization project.

Bucchere, Shaun 52:21

The link to the survey has also been posted in the chat.

Pinette, Justin 52:21

Oh, OK.

Yeah, please. Please take the survey, because it it definitely does help and it directs.

You know how we tailor these these trainings, so it would be a big help for us if you could do that.

Anybody else have any questions about?

E Pro or just the upgrade in general maybe?

OK.

Well, that's all that we have for you today.

Thank you for attending.

If there's any questions or or anything like that, you can you can get a hold of of me.

Justin dot pennette is my e-mail.

And we'd be more than happy to to get you taken care of with whatever questions you have.

Yeah, that the the rollout date was changed from 10/29 to 11/25.

We needed a a little more time.

No problem.

We have people waiting in the lobby.

Yes, as to the availability of this presentation, yes, it will be available for you guys.

I'm not sure.

Michelle, do you know if we're distributing this or if there's a download link?

RM **Reutter, Shanon M** 56:07

Yes, this will be posted on the modernization page under the training documents where you signed up.

You can grab the presentation there.

It'll be there within a few days.

RM **Reutter, Shanon M** 56:57

You can go ahead and end the meeting

Bucchere, Shaun stopped transcription