Transcript

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started transcription

Bello-Persson, Maty 0:18

Welcome everyone.
Today, he procurement fluid user interface course.
My name is Mary Bell person and I will be your presenter today.
I've been with this paper 24 years of four CT for 12 and the last two have been for QE Major League.
This time we request that you place your cell phones and library, keep engaged and if you have any questions, use the Q&A section that shows next to chat at the top of your screen to ask them.
We will address your questions at the end of each meeting.
Today we will go over the changes in April with this upgrade.
Trainer, facilitator and participant, both as your trainer, I will cover the content of the course and go over the functionality of fluid.
Zakiah Canty will be our facilitator and will share the presentation and monitor the Q&A section and as the participants.
You are welcome to ping your questions in the Q&A section, but your camera and microphone will be disabled as we are in webinar mode.
New user interface.
When you hear the term fluid, think of pages adapting to the various screen sizes of the different mobile devices, such as cell phones and tablets.
The Fluid user interface is responsive and easy to use.
Has an easier tile based navigation and caters to a variety of users in different roles.
At the end of the course, you will have the ability to create and manage requisitions, understand the approval process, and create a managed receipt.
And we have allotted approximate times for each of the units we will review and for questions at the end of each unit. Those units are creating requisitions, managed requisitions, fluid approvals in April and receipt.
On the first unit, we will cover the steps to create a requisition in the fluid user interface.

Creating a requisition the three parts in the process of creating a wreck are entering the requisition.
Default adding items to the cart and reviewing and submitting.
Here's a look of the brand new fluid interface. On this screen we see the Core-CT financials module times clicking the procurement tile gives user access to those actions in the module that their security allows highlighted on the screen are the tiles we will review today.
When to use Ebro, we use Ebro requisitions when ordering items from the catalog. When buying office supplies from a punch out supplier, when there is a need for special requests such an item not on contract or when submitting a more specialized requisition such those listed on the screen.
Navigation.
To create a new req, you select Core-CT financials on the home page menu.
Then click the eProcurement tile and then click the create requisition tile.
Acquisition default.
This is where the navigation will land you under reposition defaults page, formally known as the Define requisition page, you enter the header line, shipping and distribution values that affect the entire req. If you have access to multiple business units, you will have to select the correct BU for.
The rec you are creating.
And the rec name, you can enter the value as your agency decides the rec will be identified fairly to enter a retain name will populate the rec ID.
As the right name, upon submitting their requisition.
A red type must be determined at this time. Once the Req is submitted, the req cannot be changed.
There's no need to enter supplier information or account code for catalog and punch up orders. Those values populate from the supplier items added to the cart.
If the requester is not the buyer assigned to the requisition, a buyer must be entered at this point.
Regular charges are now divided into 3 tabs.
That's charged 1-2 and three the details tab is used for inventory acquisitions and the asset management tab is used to enter assets information.
The default options have been removed from this page as that option is now handled via the Mask change lane, which will be covering later in the training.
Types. It is important to select the correct requisition type at this stage. Once the

requisition is submitted, the req.
Le left. You will find a list of job aids for the different requisition types. They can be accessed on the Core-CT team or modernization website as they become available.
This is a summary of our red types and their definitions.
This deck will be posted.
After the training for future reference, it'll be here on the chat and it'll also be at the on the Core-CT Modernization page.
Type upon selection populates a distinct hyperlink underneath it.
Clicking it will open to custom pages that require your input and this example direct type is requisition and the hyperlink that populate is obligation amount as a reminder, if the requester is not the buyer assigned to the wreck, a buyer must be entered and direct defaults to avoid.
Issues with sourcing direct to a purchase order.
As previously stated, the distribution default section is divided into 5 tabs to allow for better appearance on mobile devices.
Char Fields 1-2 and three display the regular char field.
As shown on the screen.
The Details tab is for inventory items. As we previously mentioned and the other information tab is to enter the asset management values.
You can also click show all to display all values on the same page.
Once finish entering the red default, you'll hit done and you'll come to this page where you can select an option from the left depending on the requisition you are creating.
These are the same options we have available today in the classic version of April.
Catalog search when you click catalog you will be taken to the advanced search page where you can enter a keyword in the description to bring up results upon clicking search.
Oracle has removed the section to search the catalogue by contact ID, but you have plenty of other fields to narrow or expand your search criteria.
To search by the complete CM number or supplier item ID, ensure the operant is set to equal.
And not to contains any.
Otherwise, enter the last set of digits for the item ID in between percent sign wild card.
This is the advanced storage page with pads.

Enter in the description field, display in a search result of all catalogs items.
Containing pads in their description.
Left panel displays filters for a single supplier can be selected to show all results for that supplier. We highly recommend using this filter to avoid multiple P OS creating from the same rec.
Click the arrow to view item details and click add to cart to include items in the shopping cart.
Remember to follow the policy of one supplier, one buyer and one requisition for purchase order.
Hey I didn't details page includes a long description of the item which can help determine whether you choose. You chose the correct item on your red line.
The item ID represents the catalogue management number.
Enter the desired quantity, then click the add button to include items into your shopping cart.
But the new persistent card functionality, you can add items to your cart and return later to complete your purchase.
The items will remain in the cart.
Also, if you have any questions about contract pricing in the catalog, you may contact the contract specialist at the as procurement.
Clips of pipes to purchase an item from a web supplier, navigate to web suppliers and select one of the options.
You can then use your site to search for items and to add them to your cart.
If you notice the web suppliers option is not available.
That means there are items in the cart left from a previous session.
Check your cart and empty it for the web suppliers option to become available for selection.
We can continue to check out on the supplier side, redirect you to the fluid check out page to submit the requisition for approval.
Request click the special request option to add items not on contract.
Use this page to describe and include good in the requisition.
Some fields are required and they are identified with asterisks such as the supplier ID, which is crucial.
I'm sorry for accurate processing. You can choose to share additional information by typing.
It in the comment text section which you can make visible on the PO receipt or

voucher page.
By selecting those flags.
6 Plus service use this option if you know the cost of this service in the requisition.
For example, repairing an electrical panel will cost $1500.
I'm a material select this action for requisitions where there will be services as well as materials included.
Excuse me.
For instance, a $75 part is needed to repair a water heater in four hours at 5 at $50.00 an hour.
Service applies when the time required to complete the repair or service is unknown and no materials are needed.
For example, troubleshooting computer issues at $125 per hour and you don't know how long it will take.
Templates use this option to create and manage templates. The price of template items updates with each catalog revision.
Favorites. This option is selected to create, group and manage favorites.
The price of favorites updates with each catalog revision as well.
Both templates and favorites have job aids to perform those tasks, and they can be accessed on the Core-CT Modernization page as they become published.
Make a shopping cart icon for an overview of your car.
The cart remains active, updating Azure items take advantage of the persistent cart feature to store your progress in between sessions and return later to complete and save or submit your order. Even if the CART icon shows a 0.
We recommend to always click it to check for any unneeded items left from a previous session or requisition.
This is a known Oracle bug and we're working with them to get our solution.
Select the checkout button to display the requisition detail.
On the checkout page you have the option to review all details on all sections of your requisition for accuracy before submitting it for approval.
9 details page will default the values of the line item.
Here you can indicate whether the records were good or services.
See any additional information on the line supplier and manufacturer information if available and purchasing authority of the rec.
Purchasing authority defaults as contracts and it is up to the user to change it accordingly.

A purchasing authority of contracts requires a contract ID.
But for das bed POS or PSA rectifier with the contract ID could be left blank.
Let the schedule details tab to access details shipping information. This section provides a comprehensive item summary used to manage and track the delivery of requisition line items such as delivery date, quantities and shipping locations for the goods or services.
The schedule details tab also provides access to the distribution charges.
Access the distribution section under schedule details tab.
And click the plus sign on the right to add another distribution for the line.
Item replace the chart fields accordingly on the added lines and allocate the percentages for each line appropriately.
All distribution lines must add up to 100% for each recline.
Has changed the default options box has been removed from the opposition defaults page.
This functionality is now handled through mass change. The load values from default button populate fields with information from the requisition default.
Changes made to field and the mass change page will override the requisition default.
Add multiple lines on a requisition.
Select the desired lines by checking the boxes in front of them or use the select all checkbox.
Click the actions drop down and select mass change.
And the mass change page.
Click the load values from default link to review the current child fields on the right defaults page.
Edit the field as needed.
And click the done button. When finished a pop up window will appear asking if you want to retrofit field changes to the selected requisition line.
Schedule not already sourced to peels. Click OK to do so.
Click the like comment icon to open the line.
Comments and attachments for specific line enter the additional info in the comment text box.
Line comments can be directed to the supplier and will display in the purchase order receiving page for voucher pages accordingly when the appropriate flags are checked.

Users can also add attachments that allow requesters to communicate supplemental information and requirements to suppliers, approvers and other for city users, and are always tied to the requisition use the add attachment button to include support documentation with the requisition.
The process is intuitive, but the steps are on the job page, which can be accessed on the corset team modernization site.
They also spell that on the screen.
Even submit.
The save button, save the requisition and assign set of rrek ID but it will not initiate approvals workflow.
The submit button will save the requisition, start the approval workflow and also generate a confirmation page.
The save button is was formally called pay for later.
And the submit button is what we used to call save and submit.
Page displays a summary of the requisition.
A link to view printable version.
A link to review the approvals.
Want to edit the rec? Want to access the my requisitions page and want to create a new requisition.
Here are the key points of creating a wreck. The three steps to create a requisition are completing the rec default, adding items to the cart, and reviewing and submitting for approval.
Takeaways.
Comments can be sent to the vendor with the purchase order or displayed on the receipt and or their voucher.
Attachment can be included and sent to the supplier with purchase orders that are dispatched via e-mail.
The confirmation page provides a summary of the rec and confirms it has been successfully submitted.
You can save requisition lines as favorites and or templates.
Funding can be split and distributions can be assigned accordingly.
Next two slides contain a list of job aids associated with creating a rec.
You should be able to access those job aids on the course team organization website as they become published.

I will take any questions you've asked in the Q&A section regarding our first unit, the guy who you kindly share the first question.

Canty, Zakiah 25:31

At this time, we don't have any questions.

Honey, we can give it a couple seconds and see if anyone has.

Anything they would like to.

Get assistance with.

OK. Can you type your question into the chat please?

Bello-Persson, Maty 25:54

Q&A.

Canty, Zakiah 26:18

It's not typing.

Bello-Persson, Maty 26:42

Any questions in the Q&A section?

OK, Michael is turning.

That is this something that all agencies are moving to.

Yes.

They're all using.

Fluid user interface because Oracle is no longer supporting the classic version.

When will this come into effect?

As of now.

Golite is scheduled for November.

Help me here.

End of November, November 20. Thank you.

Canty, Zakiah 27:46

November 25th.

Reutter, Shanon M 27:46

November 25th.

Canty, Zakiah 27:49

Mm hmm.

Bello-Persson, Maty 27:50

Thank you.

Canty, Zakiah 27:54

OK.

Any other questions at this time?

Alright.

Bello-Persson, Maty 28:05

You need to change this mobile too.

Canty, Zakiah 28:10

One one more question, I'm sorry.

Bello-Persson, Maty 28:10

You went this morning.

Oh no, that's fine. Go ahead.

Canty, Zakiah 28:13

Will we receive a hard copy of this training?

Bello-Persson, Maty 28:18

This training will be published.

In the chat after is completed and it will also be part of the.

Four City Marine Station page.

All the training information will be on that page as well.

You're welcome.

OK.

So let's move on to Unit 2 management position. In this unit, we will explore how to manage existing requisitions, perform key tasks using the fluid interface and discuss navigation changes. You will familiarize yourself with managing requisitions, actions,

learn how to find, edit and update requisitions as needed. And.
Understand how to navigate the updated interface for more streamlined experience.
Navigation to manage your positions.
It will start in the employee self-service homepage and select core City Financial.
You will click the E procurement tile and then click the manage requisitions tab.
Manage Rect style opens to the my requisitions page, which defaults to a list of the last seven days worth of Rex created by the user in all statuses. But complete filters can be adjusted to expand or narrow the search results.
And searching by budget status.
Ever will bring up all Recs in budgetary.
Actions speak the action drodown list on the left to see the available options for a particular requisition. The actions that display are detailed.
Copy View, print, cancel, edit and view pools and they will display according to your security role.
Collecting the details action will bring you.
To the rec summary.
The rec lifeline that shows where the rec is in the process.
In a list of the reclass.
The copy feature will create a new requisition based on the previous order saving time by replicating all the lines data. Users can then modify the new rack accordingly.
The rack type will be faulty requisition and the new rack and will need to be updated if required as well.
As the new rectangle added custom pages.
Please note that punching requisitions cannot be copied.
Just as usual, the viewpoint selection will provide a printable view of the rec and you will be prompted to select whether you like to see the distribution lines as the state of Connecticut continues to be paperless, we recommend viewing the page electronically, but the option to print is.
Available.
This election let's you cancel our position. If you have the proper security role. The process is very intuitive.
Use addit to modify a requisition.
You will be prompted with a message advising that the approval workflow might be reinitiated. Click OK.
Then click check out to make the changes.

Yes.
To editable position click either direct default link or the schedule details line details pages accordingly.
Approval change. This action allows you to see the different workflow approvers and levels and shows you where the rig is in the approval process.
Manage Rex key points.
Though my review, I'm sorry the my requisitions page shows you a list of reps created by the user in the last seven days and all statuses but complete or a list of search results. By adjusting the filters you can perform different actions on each rec according to your.
Security rules.
Those actions are listed on the screen.
There's a list of job aids pertaining to this unit, which will be published on the course team site.
Now I will take any questions on Unit 2.
Are there any Z?

CZ **Canty, Zakiah** 34:46
OK.
No, not at this time.
No questions.

BM **Bello-Persson, Maty** 34:52
In a few moments to see if anybody.
We we don't have any questions for managerex.
We will move on to the approval unit.
And you need 3 mobile cover the streamline fluid approvals process.
Key topics will include navigating the fluid approved interface, understanding the approval statuses in managing and tracking approvals effectively.
Navigation for approval starts on the corset financials option of the home page.
Click the procurement tile and then the approvals time.
Approvers can efficiently review requisitions.
View all relevant details and access approval options directly from the approvals page.
As were the integrated workflow, the approvals process is seamlessly integrated with

the overall requisition life cycle, ensuring that all necessary documentation and compliance steps are completed prior to approval. Throughout this session, we will explore how to navigate the approval screen.
In process approval actions efficiently.
These streamline process enhances visibility for approvers and ensures compliance with the state's procurement policies.
Pending approval.
The approval style will open to this page.
Here the approver can see all the pending financial transactions approvals according to their security. The accounts for each module.
As you can see here, the positions and purchase orders.
And a total count.
Breaking in a transaction will open its details from the Approver's perspective.
A decision approval on his page.
The approval has the options shown. The approval chain approval line details, view printable version, area of requisition, approve, deny and more, which opens to options for push back, hold and request information.
Google Chain link displays the various stuff in the approval process along with the current approval status. Clicking the multiple APPROVERS links will display the users and that approval level.
Approval line detail selecting a red line displays the approval line detail page which shows you the line details in shipping information for that line.
Working on the schedule line under shipping information shows you the distribution detail.
View printable version.
As mentioned before, these options is self-explanatory.
A message will display asking whether you like.
The distribution chart is populated on the output.
And a state of previously the state is paperless and we recommend that this is viewed electronically.
But the option to print it is available.
I can edit requisition opens the edit requisition page, allowing the approver to make changes to the requisition upon clicking check out.
The arrow opens up the schedule details in line details on the same page as two separate tabs. The schedule details allows you to see the distribution.

Accuracy. The approver can click approve. This will prompt the comments box.
Comments are optional for the approved action.
Clicking submit will approve the rec.
It will drop for that level of approval and show up on the next level.
I prompts the user to enter approver comments before clicking submit to deny the requisition.
Comments are required for deny.
The requester receives an alert notification and the requisition is terminated.
Making more displaced additional options, including pushback, hold and request information.
Comments are required for all three of these functions.
There are related jobbase at the bottom of this slide which can be accessed on the modernization website as they become available.
Here's a list of javas related to the approvals unit which can be accessed on the modernization page once they become available.
We have any questions for Unit 3?
I will take them at this time.

CZ **Canty, Zakiah** 42:27
We currently don't have any questions.

BM **Bello-Persson, Maty** 42:34
In that case, I believe we can proceed to Unit 4, which is receive.
This unit will review creating and managing receipt using the new Fluid user interface, highlighting some navigation changes.
Require for all purchase orders, whether for goods or services. Receiving can be done in both purchasing and in procurement module.
The PO must be dispatched and the user needs the general receiver or the casual receiver to receive.
Casual receivers are limited to only receiving POS that source from requisitions they create.
Navigation to add an update receipt from the employee's self-service homepage.
Select four city financial, click the procurement tile and then the add up the receipts tile.
On this page you have the options to add a new receipt and update an existing one

to add a new receipt, click the add new receipt link to update a receipt search the appeal you wish to receive, making sure the ship to value is accurate, or delete it.
So you can see all lines.
Click the details icon to access the receiving page.
Once you click the add new receipt hyperlink, ensure the right business unit is populated and the PO receipt box is checked.
The receipt ID value is system generated. Click add.
Here the user enters the search criteria values to locate the pill and receive its required lines.
Receiving page, the user enters values such as received quantities and shipping details.
That's applicable.
Users may also need to update information like date and location of delivery.
Date to complete the process and generate the receipt in the system.
The receipt date is the date the items were received and not the date the receipt is created in four receipt date value must be edited as appropriate.
I don't exist to receive.
And here you can enter the receipt number or sufficient information on the search criteria and then click search.
Review the search results and select the relevant receipt to view or update by clicking on it. Then click the details icon to access the receipt.
Navigation to my receipt to access the my receipt page, select the query city financials option from the employees self-service homepage, then click the procurement tile and then click the my receipt style.
On my receipt, the user can view active receipts. They have created the search criteria filters can be adjusted to expand the result.
Users can perform several actions such as view details, deliver information and others by clicking on the buttons.
Please note some icons are displayed but are currently the same.
To maintain activity and comments page you can track activity history and add comment.
And the maintain deliver information page. There are two tabs delivery location and location comments.
The user can add or update delivery our location information as needed.
Receipt I can direct the user to the out of the receipts page where they can make

modifications to the selector receipt.
Recap. Receiving is required for all purchase orders.
A receipt is created to accept items or services received. Optional comments can be entered.
The receipt is then saved and the payment process continues in the accounts payable module.
T Rex to receive the Associated PO must be dispatched and the user must have either the casual receiver or the general receiver role.
The receipt date is the date the items were received and not the date the receipt is created in core.
Receipt date value must be edited as appropriate.
So to wrap things up, according to our training goals, you now have knowledge on how to create a rack and fluid, how to manage existing racks. You have a handle on rack approvals and can create a managed receipt according to your security.
How do we have any questions?
Uh.

CZ **Canty, Zakiah** 50:29
I have a question.
Is this receipt piece new?
I've never done this part before.

BM **Bello-Persson, Maty** 50:36
OK, the receipt part is not new. If you've never done it before, that's probably because you don't have the role in somebody else in your agency is doing that part.
Any other questions?

CZ **Canty, Zakiah** 51:12
And we don't have any further questions.

BM **Bello-Persson, Maty** 51:19
OK, it looks like we can move on to the next slide then.
Right, so for some post training follow-ups.
We encourage everyone to log a footprints ticket.
You have any questions or any issues with anything?

It is the fastest way to get your issue addressed.
Keep an eye out for emails when you have a ticket open as the help desk will communicate through the ticket. You can respond to the e-mail from fruitprints to footprints.
Attaches the e-mail to the ticket and notifies the help desk that you have responded.
That is the process.
The tickets are routed directly to the team that handles the module for faster processing. If you are in the need of frequent access, please e-mail the readiness mailbox entering footprints access in the subject.
If your e-mail domainisct.gov you have access to footprints. If you have an e-mail address.
Address that does not end in city.gov.
You could e-mail the readiness mailbox for the help desk to create the footprint.
Stick it for you.
For you.
Please watch for emails from footprints, even though you don't have footprint access, you can still respond to the e-mail as it will attach to the ticket and will also notify the help desk that you have responded.
Please, please refrain from reaching out to the module leads.
As we need to document every single issue that comes in along with the resolution.
Congratulations, you have successfully completed the procurement fluid User interface course.
Kindly take a moment to complete the training eval.
We really appreciate your input.
As previously mentioned, the course material will be available for reference and will be posted in the chat. For additional information, please visit the courses team administration site.
With that, we thank you so much for your participation.
And have a great rest of your day.

JJ **Jimenez, Jorge** 54:26
Maddie, I think there is one question in the chat.
Kelly.
I'm butchering your name.
I'm sorry I was asking.

CZ **Canty, Zakiah** 54:38

It says is there a contact person we can use when using this new system?

BM **Bello-Persson, Maty** 54:44

Yes, footprints.

There's the modernization page where you can find details and everything we got into the upgrade.

And if you don't find your answer there or under training pages, you can contact the help desk.

CZ **Canty, Zakiah** 55:29

This goes into the effect in November.

As Maddie said before.

BM **Bello-Persson, Maty** 55:33

I'm going to make this.

CZ **Canty, Zakiah** 55:48

I think we're all set, Maddie.

BM **Bello-Persson, Maty** 55:50

OK, looks like we're down.

Thank you everyone.

Thank you all. Have a good day.

Another rec training session.

Yes, you should have a schedule.

There's one I believe tomorrow morning and one on Thursday afternoon.

CZ **Canty, Zakiah** 56:43

OK. Tammy, did you have a question?

I see you typed in the question and answers.

Wait, do you have a question ask.

Oh OK, it's answered.

And the question section.

The same question before I you can answer it if you would like. It says. Where would the manual be for this training?

BM **Bello-Persson, Maty** 57:17
Would be in their modernization page in the core city website.
And the deck will also be shared after the training.
We'll put it in the chat.

CZ **Canty, Zakiah** 57:36
OK.
I think we're all set.

BM **Bello-Persson, Maty** 57:41
Perfect. Sounds good.

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