Transcript

October 22, 2024, 5:04PM

BM **Bello-Persson, Maty** 0:01

Welcome to the Procurement Fluid User interface course.
My name is Maddy Belloperson and I will be your presenter today.
I've been with the state for 24 years, of course.
CT for 12 and the last two years as the EPCKE module.
At this time, we're going to request that you please place your cell phone on vibrate.
Keep engaged and if you have any questions, please use the Q&A section that shows next to the chat at the top of your screen.
We will address the questions at the end of each unit.
Today we'll go over the changes in April with the upcoming upgrade.
Your training as your trainer today.
I will cover the content of the course and go over the functionality of ebook in fluid.
The Kayakanti will be our facilitator and we'll share the presentation and monitor the Q&A section in the participant.
You're welcome to ping your questions in the Q&A section, but your camera and microphone will remain disabled as we are in webinar mode.
Kuwait user interface.
When you hear the term fluid, think of the E Pro pages adapting to the various screen sizes of 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 this course, you will have the ability to create and manage requisitions, understand the approval process.
And create a managed receipt.
This is our agenda.
We have a lot of 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 approval in April and receipts.
The first unit we will cover the steps to create a requisition in the fluid user interface.
Three parts in the process of creating our requisition are entering the requisition

default, adding items to the cart and reviewing and submitting for approval.
I'm getting OK, so you're handling the chat right?
The.

CZ **Canty, Zakiah** 3:38
Yes, I got it.

BM **Bello-Persson, Maty** 3:40
OK.
Thank you. OK.
So here's a look of the brand new fluid interface. On this screen, we see the corset financials module tile.
Clicking the procurement tile gives you access to those actions in the module that your security allows.
Highlighted on the screen are the tiles we will be reviewing today.
April, we use April acquisitions when ordering items from the catalog when buying office supplies from a franchise supplier. When there is a need for a special request such as an item not on contract or when submitting a more specialized proposition such those listed at the bottom of the.
Screen.
Navigation to create requisitions.
First, you're going to select core city financials from the home page menu.
Then you click the procurement tile and then click the create requisition tile.
Will land you here under requisition defaults page, formerly known as define requisition. Previously, please. Thank you.
Here you enter the header line, shipping and distribution values that affect the entire wreck. 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 Dec.
The rec will be identified.
Failing to enter a red name will populate the rec ID as direct name upon submitting the rec.
A red type must be determined, determined at this time. Once the red type.
I'm sorry, once the requisition is submitted, the red type cannot be changed.
There's no need to enter supplier information or account code for catalog and punch

out 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.
Regular char fields are not divided into 3 tabs as char fields 1-2 and three.
The Details tab is used for inventory requisitions and the asset management tab is used to enter asset information.
Default options.
That we see today in classic have been removed from this page as that option is now handled via the mass change link which will cover later on in the training.
Types. It is important to select the correct requisition type at this stage. Once the requisition is submitted, the rect type cannot be modified on the left. You will find the list of Java's with the different requisition types. It can be accessed on the core CT modernization website.
As they become available.
Of our red types under definitions.
This deck will be posted on the Corset team site after the training so you can have it for future reference.
Type upon selection populates a distinct hyperlink underneath it.
Clicking it will open to custom pages that require your input and this example.
The red type is requisition and the hyperlink that populates is obligation amount as a reminder, if the requester is not the buyer assigned to The Reg, a buyer must be entered under red default to avoid issues with sourcing the red to a purchaser.
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 their regular charfield field as shown on the screen.
The Details tab is for inventory items and the asset Information tab is to enter the asset management values.
You can also click show all to display all values on the same page.
Trying to work default.
You'll come to this page where you will 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.
Analog 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 this section to search the catalog by contract ID, but you have

plenty of fields to narrow or expand your search criteria until we.
Until we add that section again, we're working on adding it again.
We see that it is important to have it.
Also, to search by the complete CM number or supplier ID, ensure the operand is set to equal as supposed to contains any.
Another work around until we have these customization in place is to enter the last set of digits for the item ID in between percent sign wild card.
Right.
This is the advanced search page with the word pads entered in the description field.
Displays every a search result of all catalog items containing pads in their description.
Left panel. This place filters where a single supplier can be selected to show all results for that supplier.
We highly recommend using this filter to avoid multiple pills creating from the same requisition.
Click the arrow to view item details and click add to cart to include items in the shopping cart.
Remember to follow the policy of one supplier, one buyer and one requisition per purchase order.
Item details page includes a long description of the item which can help determine whether you chose the correct item on your record line.
The item ID represents the catalog manage number.
Enter the desired quantity, then click the add button to include items in your shopping cart.
With the new persistent cart functionality, you can add items to your cart and return later to complete your purchase.
If you have any questions about contract pricing and the catalogue.
You may contact the contract specialist at the AS procurement.
I purchased an item from a website.
Navigate to web suppliers and select one of the punch out options. You can then use your site to search for items and add them to your cart.
If you notice that the web suppliers option is not available for selection, that means there are items in the cart from a previous session.
Check your cart and empty it for the web suppliers option to become available for selection again.
Continue to check out on the supplier site redirects you to the Fluid Checkout page

so you can submit the requisition.
For special request, click the special request option to add items not on contract. Use this page to describe and include goods in the requisition.
Some fields are required and they are identified with asterisks.
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 pages by selecting those flags.
Service option. If you know the cost of the service and the requisition.
For example, repairing an electrical panel will cost $1500.
Materials for requisitions, where there will be services as well as materials included.
For instance, a $75 part is needed to repair a water heater in four hours at $50.00 an hour.
Variable cost service applies when the time required to complete the repair or service is unknown and no materials are required.
For example, troubleshooting computer issues at $125.00 an hour and you don't know how long it will take.
Use the template option to create a manage template or add items that are popular in your agency.
The price of template items updates with each catalog revision.
Favorite options is selected to create.
Group and manage favorites.
The price of favorites updates with each catalog revision.
Both templates and favorites have Javid to perform those tasks and they can be accessed on the course team materialization page as they become published.
Stopping cart, click the shopping cart icon for an overview of your cart.
The cart remains active updating as you add items.
Take advantage of the persistent cart feature to store your progress in between sessions and return later to complete and save us or submit your order even if the CART icon shows a zero, we recommend to always click it to check for any unneeded items left from a pre.
Session or requisition?
This is.
It happens sporadically, but it's a known Oracle bug and we're working with them to get a resolution.
Selected check out button to display the requisition detail.

Check out page. You have the option to review all details on all sections of your requisition for accuracy before submitting it for approval.
The line details page.
Will display the values of the line item.
Here you can indicate whether the rack is for goods or services.
See any additional information on the line supplier and manufacturer information if available and purchasing authority of the line.
Purchasing authority default as contract and it is up to the user to change it accordingly.
A purchasing authority of contracts requires a contract ID.
Except for the ASP and POS or PSA reductions where the contract ID could be left blank.
Like 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 ship to locations for the goods or services.
The schedule details tab also provides access to the distribution chart fields.
Access the distribution section of the schedule details tab and click the plus sign on the right to add another distribution for the line.
Auto replace the truffle accordingly on the added lines and allocate the percentages for each line appropriately.
All distribution lines must add up to 100% on the red line.
Has changed the default options box that we currently see.
In in classic has been removed from the requisition defaults page.
This functionality is now handled through mass change.
The load values from defaults button populate fields with information from the precision default.
Changes made to fields on the mass change page will override the requisition default.
Support lines on a requisition. Select the desired lines by checking the boxes in front of each line, or use the select all check box.
Click the action strut down and select mass change.
And the mass change page.
Click the load values from default link to review the current char fields on the right defaults page.

Edit The fields as needed and click the done button. When finished a pop up window will appear asking if you want to retrofit field changes to the selected requisition lines or schedule not already sourced to POS.
Click OK to do so.
Find comments and attachments.
Click the link comments icon to open the line.
Comments and attachments for a specific line enter the additional info in the comment text box.
Line comments can be directed to the supplier and will display on the purchase order. Receiving pages or voucher pages accordingly when they are proper.
Appropriate flags are checked.
Previous slide please.
Users can also add attachments that allow requesters to communicate supplemental information and requirement to suppliers, approvers and other for city users, and are always tied to the requisition.
Use the add attachment button button to include supporting documentation with the requisition.
The process is intuitive, but the steps are spelled out on the screen and also on the job page.
Which can be accessed on the Corsi team at an station site.
Read and submit.
We presently have two buttons. One is save for later and the other one is save and submit in fluid we have the same two buttons but save for later is not called save, save and save and submit is now called.
Please submit.
The save button, save the requisition and assigns it a rec ID but will not initiate approvals workflow. The submit button will save the requisition, start the approval workflow and generate a confirmation page.
The confirmation page displays a summary of the requisition, a link to view a printable version, a link to review the approvals.
Want to edit their requisition?
Want to access the my requisitions page and want to create a new requisition?
Key points of creating a wreck we have that the three steps to create a requisition are completing direct default, adding items to the cart and reviewing and submitting for approval.

Takeaways from this unit are.
The comments can be sent to the vendor with the purchase order or displayed at the receipt or the voucher.
Attachments 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.
The next two slides contain a list of job associated with creating a requisition.
You should be able to access those job aids on the Coursey team modernization website as they become available.
I would take any questions you've asked in the Q&A regarding our first unit, but Kyle, would you kindly share the first question?
The Kaya do we have any questions? No.

CZ **Canty, Zakiah** 26:24
No, no, no questions as of yet.

BM **Bello-Persson, Maty** 26:28
OK.
So in that case we can move on to.
The next section.
Unit 2.
Manage requisitions.
In this unit, we will explore how to manage existing Recs or form key tasks using the fluid interface and discuss navigation changes. You will familiarize yourself with managing acquisitions actions.
Learn how to find, edit, and update requisitions as needed, and understand how to navigate the update. The updated interface for more streamlined experience.
Navigate to managed acquisitions.
You will start on the employee self-service home page and select the core CT financials option.
Click the E procurement tile, and then click the manage requisition style.
Manage what?
Manage acquisition style will open to the Myrequisations page which displays a list

of the last seven days worth of Rex created by the user and all statuses that complete filters can be adjusted to expand or narrow the search result.
Searching by budget status error will bring up acquisitions that are in budget error.
Actions click the action drop down list on the left to see the available options for a particular web position.
The actions that display are detailed copy view, print, cancel, edit and viewpro.
And they will display according to your security rules.
Selecting the details action will bring up direct summary direct Lifeline that shows where the rec is in the process and the list of direct lands.
The copy option will create a new requisition based on the previous order saving time by replicating all the lines data.
Users can then modify the new rec accordingly.
The red type will default to requisition and the new rec and will need to be updated if required as well as the new red type related custom pages.
Please note that contract requisitions cannot be copied.
Just as usual, the viewpoint selection will provide a printable view of the rig 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 to you.
This election cancel let's you cancel acquisition if you have the proper security rule.
The process is very intuitive and quick.
Use the edit selection to modify a rack.
You will be prompted with a message advising that the approval workflow might be reinitiated.
Click OK, then check out to make the changes.
You edit the wreck.
Click either direct defaults link or the schedule details line details pages accordingly.
The appropriate chain action allows you to see the different workflow approvers and levels, and shows you where the records in the approval process.
Some key points.
The my requisition page shows you a list of Wicks created by the user in the last seven days.
In all, status is back complete for a list of search results by adjusting the filters you can perform different actions on each rack according to your security rules.

Those actions are shown on the screen.
Here's a list of jobs pertaining to this unit, which will also be published on the core CT modernization site.
Here, right now will take any questions pertaining to Unit 2.

CZ **Canty, Zakiah** 32:41
No questions as of now.

BM **Bello-Persson, Maty** 32:43
OK.
Thank you.
This will then lead us to move on to Unit 3.
Approval on Unit 3, we will cover the streamline fluid approvals process.
Any topics will include navigating the fluid approved interface, understanding the approval statuses, and managing and tracking approvals effectively.
Navigation for approval.
Start on the core CT financial option of the homepage.
Then you click the procurement tile and then the approval style.
Approvers can efficiently review requisitions.
View all relevant details and access approval options directly from the approvals page.
As for 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 screens and processes and process approvals actions efficiently.
The streamline process enhances visibility for approvers and ensures compliance with the state's procurement policies.
Singapore, the approval style were open to the speech.
Here the approver can see all the pending financial transactions approvals according to their security. The count for each module. In this case Rex and Pios and a total count.
Clicking in a transaction will open its details from the Approver's perspective.
Under a approval page, the approval has the options shown.
The approval chain approval line details new printable version Edit, requisition,

approve, deny and more, which opens two options for push back, hold and request information.
Like in the approval chain link displays the various steps in the approval process along with the current approval status. Clicking the multiple approvers link will display the users on that approval level.
Google line detail.
Selecting a red line displays the approval line detail page which shows the line details and shipping information for that line.
Clicking on the schedule line under shipping information shows the distribution detail.
Can you print the one information? This option is self-explanatory.
A message will display asking whether you like the distribution traffic populated on the output, and as we recommend earlier.
State of Connecticut has gone green or paperless, and we recommend you viewing this electronically, although the option to print is available.
You can edit requisition opens the edit requisition page, allowing the approver to make changes to the rec up on clicking check out.
The arrow opens up the schedule details and line details on the same page as two separate tabs. The schedule details allows you to see the distribution.
Once reviewed for accuracy, the approver can click approve.
This will prompt a comments box.
Comments are optional for the approved action.
Clicking submit will approve the requisition.
It will then drop for that level of approval and show up on the next level.
I can deny prompts the user to enter approver comments before clicking submit to deny the requisition.
Comments are required for deny the request to receive an alert notification and the requisition is terminated.
Working more displays additional options, including push back, hold and request information.
Comments are required for all three of these functions.
There are related jobs at the bottom of the slide which can be accessed on the modernization website as they become published.
And these are the job is related to the approvals unit which again can be accessed on

the modernization website.
And if we have any questions for Unit 3, I will take them at this time.

CZ **Canty, Zakiah** 39:36
No questions.

BM **Bello-Persson, Maty** 39:39
Thank you, Kaya.
Then we'll move on to Unit 4 please.
And here it is receipts.
In this unit will review creating a managing receipts using the No Fluid User Interface, highlighting some navigation changes.
Seattle review.
Receipts are required for all purchase orders, whether for goods or services.
Receiving can be done in both purchasing and in procurement modules.
The PO must be dispatched and the user needs the general receiver or casual receiver role to receive.
Casual receivers are limited to only receiving POS. The source from requisitions they create.
Update receipts from the Employees self-service homepage.
Select Core city financials.
They click the input human tile and then click the add, update receipt style.
And this page you have the options to add a new receipt and update existing an existing one.
To add a new receipt, click the add new receipt link to update a receipt. Search the Po you wish to receive.
Making sure the ship to value is accurate or deleted so you can see all the lines.
A managed receipt.
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 peer receipt box is checked. The receipt ID value is system generated. Then click add.
Here the user enters the search criteria values to locate the pill and receive its required line.
And the receiving page the user enters values such as received quantities and

shipping details as applicable. Users may also need to update information like dates 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.

Finding an existing receipt enter the receipt number or sufficient information on the search criteria, and then click search.

Review the search result 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 Core City financials from the employee self-service Home page, then click the procurement tile and then click the my receipts tile.

Style the user can view active receives. They have created the search criteria. Filters can be adjusted to expand the result. Users can perform several actions such as view details, delivery information and others by clicking on the button.

Please note that some items are displayed but are currently disabled.

Maintain activity and comments on this page. You can track activity history and add comments about the receipt.

And then maintain delivery information page. There are two tabs delivery location and location comments.

The user can add or update delivery or location information as required.

Working on the error receipt icon, direct the user to the add up the receipts page where they can make modifications to the selector receipt.

You wake up.

Receiving is required for all purchase orders.

A receipt is created to accept items or services receipt.

Optional comments can be entered.

The receipt is then saved and the payment process continues in the account payable module.

The PREREQS to receive are that the Associated PO must be dispatched and that the user must have either the casual receiver or the general receiver role.

The receipt date is the day the items were received and not the day the receipt is created in core.

Value must be edited as appropriate.

Go to rock things up. According to our training goals, you now have knowledge on

how to create a rack in fluid, how to manage existing racks. You have a handle on rack approvals and can create and manage receipts according to your security.
Do we have any questions at this point?

CZ **Canty, Zakiah** 47:03
We do.
We currently have two questions.
Question #1.
This is something new for my agency. My smart agency currently sends receipts for payment directly to accounts payable. A majority of my Bureau's purchase orders are entered by our purchasing department.
Will we now be entering receipts for our own?
Ebro entered Rex Slash POS.

BM **Bello-Persson, Maty** 47:33
Receipts are required in court.
CT If you don't do that today, that probably means that somebody else in your agency has the roles and is doing it.
And it's probably in purchasing.
'Cause that's where most of the receiving gets done.
Is is an option in April, but it's a function of purchasing.

CZ **Canty, Zakiah** 48:00
Question #2.
Do the business units automatically populated with the new version of core?

BM **Bello-Persson, Maty** 48:09
Yes, the business unit populates according to your security. If you have multiple. If you have access to multiple business units, one will be full, but you have to make sure that you that the right BU is selected for any transaction.

CZ **Canty, Zakiah** 48:39
There are no other questions at this time.

BM **Bello-Persson, Maty** 48:45

We we don't have any more questions, should we?
Let's see.
Does anyone else have any questions at all?
Doesn't look like it, so we will move on to. This was training follow up line.
We encourage everyone to log a footprints ticket as 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 footprints to footprints, can attach the e-mail to the ticket and notify the help desk that you have responded.
That is the process.
Route it directly to the team that handles the module for faster processing. If you are in the need of footprint access, please e-mail the readiness mailbox entering footprint access in the structure.
If your e-mail domainsct.gov you have access to footprints. If you have an e-mail address that does not end in ct.gov, you can e-mail the readiness mailbox for the help desk to create a footprints ticket on your behalf.
Please watch for emails from footprints, even though you don't have footprints 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, please refrain from reaching out to the module leads as we need to document every issue that comes in as well as the resolution.
And right now, congratulations, you have successfully completed the procurement fluid user interface course.
Kindly take a a moment to.
I'm sorry to complete the training evaluation.
We really appreciate your input on this. As previously

◉ stopped transcription