L200EP007 - eProcurement-20241104_185935-Meeting Recording

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Bello-Persson, Maty 0:15

Know again everyone. I hope you all had an excellent weekend. Mine was great.
Welcome to the eProcurement Fluid User interface course.
My name is Mary Bello-Person and I will be your presenter today.
I've been with the state for 24 years.
At core CT for 12 years and the last two was the April Cuban model lead. At this time, we'd like to ask you that you please put your cell phones on vibrate.
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 them at the end of each unit, and today we'll go over the changes that need procurement with this upgrade.
Patient role out of training as your trainer, I will cover the content of the course and go over the functionality of people in fluid mechanics will be our facilitator and we'll share the presentation and monitor the Q&A section.
And ask participants.
You're welcome to ping your questions in the Q&A, but you your camera and microphone will be disabled as we are in webinar mode.
You would use your interface when you hear the term fluid.
Think of the pages adapting to the various screen sizes of different mobile devices, such as cell phones and tablets.
The Fluid user interface is responsive and it is easy to use.
It has an easier tile based navigation as you are used to on your.
Cell phones.
Or tablets and it also caters to a variety of users in different roles.
Learning objectives at the end of the course.
It is my hope that you will be able.
To create and manage requisitions, understand the approval process and create a manage receipt.

We have allotted approximate times for each of the units in our agenda.
And also for questions at the end of each unit. Those units are creating requisitions.
Managed acquisitions reward approvals in April and receipt.
On the first unit, we will cover the steps to create a requisition in the fluid user interface.
In the process of creating a requisition, are entering a requisition default.
Sorry, adding items to the cart and reviewing and submitting their requisition.
Here is a look at the brand new fluid interface.
On this screen we see the core CT financials module tiles. Clicking the E procurement tile gives user access to those actions that they're security. The security allows highlighted on the screen are the tiles within EPO that we will be reviewing today.
When to use E procurement, we use EPA positions when ordering items from the catalog. When buying office supplies from a purchase from a punch up supplier.
When there is a need for a special request, such as an item not in the catalog or when submitting a more special.
Requisition such those listed on the screen.
Itd 10 EAS bid TSR POSPSA.
Navigation to create req, select Core-CT financial on the on the homepage menu, click the E procurement tile and then click the create requisition tile.
Patient will land you here under requisition defaults page, formerly known as define requisition.
Here you enter the header.
Line shipping and distribution values that affect the entire requisition. If you have access to multiple business units, you will have to select the correct BU from for the rec you are creating.
And the rec name, you can enter the value as your agency decides the rec will be identified.
Telling to enter a red name will populate direct ID as direct name a pass submitting the requisition a red type must be determined at this time as well. Once the record submitted, the req type cannot be changed.
There is no need to enter supplier information or account code for catalog and punch up orders as those values populate from the supplier items added to the cart.
The requester is not the buyer assigned to the requisition.
A buyer must be entered.
Regular trial fields are not divided into 3 tabs as far fields 1-2 and three.

The Details tab is continues to be used for inventory requisitions and the asset management tab is used to enter assets information.
Requisition before.
The default options have been removed from this page.
And that action is now handled via the Mask Change link, which we will cover later in the training.
Red types as I mentioned earlier, it is important to select the correct requisition type. While entering the red default once the requisition is submitted, the red type cannot be modified.
On the left you will find a list of job aids for the different requisition types. They can be accessed on the core CT modernization website as they become available.
This is a summary of our red types under definitions. This deck will be posted on the course CT modernization page after the training for your reference.
On selecting each rect.
Angle underneath it.
Clicking it will open to custom pages that require your input.
On this example direct type is requisition and the hyperlink that populates is obligation amount which will open a page that needs to be completed as a reminder, if the requester is not the buyer assigned to the rack, a buyer must be enter on the requester to avoid issues.
With sourcing the req. to a Purchase order.
On default, as previously stated, the distribution default section is divided into 5 tabs to allow to allow for a better appearance on mobile devices.
Charter fields 1-2 and three display the regular char fields as shown on the screen.
It's used for inventory items and they ask that information tab is to enter the asset management values. You can also click show all to display all values on the same screen.
Yeah, requisition.
Once finish entering direct default, you will click done which brings you to this page where you will select a requisition method from the left depending on the requisition you are creating.
These are the same options we have available today in the classic version of EPO.
And when you click the catalog, the catalog method you will be taken to this 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 we are actively working on adding it again and it will possibly happen shortly after go live. In the meantime, you have plenty of fields too narrow.
More experienced search criteria until we get that section back on the page.
To search by the complete CM or item ID, ensure the operant is set to equal and not contains any. We are working on having that operant before as equal. Another work around is to enter the last set of digits for the item ID in between percent sign wild. Cards.
This is the advanced search page with the keyword pad. Enter in the description field displaying a set of result of all catalog items containing the word pads in the description.
On displayed filters where a single supplier can be selected to show all results for that supplier only.
We highly recommend using this filter to avoid multiple pills creating from the same requisition.
Take the arrow to view item details and add 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.
I don't need those.
Page includes a long description of the item, which can help determine whether you, whether you chose the correct item on your recline.
The item ID represents the catalogue management number.
Enter the desired quantity, then click add to include items in your shopping cart.
With the new persistent card functionality, you can add items to your cart and return later to complete your purchase.
This is a new feature that can be very useful during crunch times when priority shift quickly.
For any questions about contract pricing in the catalog, you may contact a contract specialist at DAS Procurement.
But for fires to purchase office supplies, navigate to web suppliers and select one of the punch out options.
You will then be directed to this site where you can search for items and add them to your cart.
Web suppliers option is not available on the left.

That means there are items in the cart from a previous session.
Check your cart and empty it full. The web suppliers option to become available for selection.
They can continue to check out.
There will be Masons site or submit car and Suburban's redirects you to the fluid.
Check out page to submit your requisition for approval.
Click the special request option to add items that are not in the stake catalog.
Use this page to describe and include goods in the requisition. Some fields are required and they are identified with asterisks.
Others populate from the red default.
You can choose to share additional information by typing it in the common text section, which you can make visible on the PO.
Receipt or voucher by checking those flags.
Fix call service.
Use this option if you know the cost of the service and the requisition.
For example, repairing an electrical panel will cost $1500.
I'm a materials select, this option for requisitions where there will be services as well as materials included. For example, a $75 part is needed to repair a water heater in four hours at $50.00 an hour.
We will call 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 $124 per hour and you don't know how long it will take.
Template use this option to create a manage templates to order popular items.
The price of template items updates with each catalog provision.
Favorites option is selected to create.
Group and manage favorites.
The price of favorites also updates with each catalog revision. Both templates and favorites have Javits to perform those tasks, and they can be accessed on the core C Team modernization page as they become published.
Take the shopping cart icon for an overview of your cart.
The cart remains active updating as you 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 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 previous session.

Or requisition.
This is a known Oracle bug that happens.
Very sporadically and we're working with them to get our resolution.
Once all the required items are added to the CART, select the checkout button to display the requisition details.
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.
Line details page will display the values of the line item.
Here you can indicate whether the rack is for good or services.
See any additional information on the line supplier and manufacturer information if available and purchasing authority of the line Purchasing Authority default of contract and it is up to the user to change it accordingly.
A purchasing authority or contracts requires a contract ID.
Except for the as bid and POS or PSA rectangular where the contract ID could be left blank.
Select the schedule details tab to to access detail shipping information.
This section is used to manage and track the delivery of requisition line items such as delivery dates, quantities and ship to locations of the goods or services.
The schedule details tab also provides access to the distribution star field.
Access the distribution section on the schedule details tab and click the plus sign on the right to add another distribution for the line.
That will replace the chart field values accordingly on the added lines and allocate the percentages for each line appropriately.
All distribution lines.
Within a red line mass add up to 100%.
As mentioned earlier, the default options box has been removed from the requisitions default page.
This functionality is now handled here via the mass change action.
The load values from default button populates values from the requisition default.
Changes made to the fields and the mass change page will override the requisition before.
Edit Multiple lines on a requisition. Select the desired lines by checking the boxes.
And excuse me.
Check in the boxes in front of the line.
I'm sorry.

39, OK.
You can also use the select all check box if the intent is to make the changes to all the lines.
Then click actions, drop down and select mask change on the mask change page.
Click the load values from defaults button to review the current style fields from the red default page.
Edit The fields as needed and click the done button. When finished a pop up window will appear asking you if you want to retrofit.
Changes to the selected requisition lines and schedules not already sourced to POS.
Click OK to do so.
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 under purchased order. Receiving pages or 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 courses to users.
These comments are always tied to the requisition.
Use the add attachment buttons to include supporting documentation with the requisition.
Process is intuitive, but the steps are on the screen and on the job aid which can be accessed on the 4C Team modernization site.
Even submit.
Like now we have 2 buttons called Save for later and the other one is called Save and submit.
They are now called save or submit.
The save button, save the requisition and assigns it a rig ID but will not initiate approvals workflow. The submit button will save the requisition, start the approvals workflow and generate a confirmation page.
The confirmation page this place a summary of the requisition, a link to view a printable version.
A link to review the approvals.
One to edit the rec and want to access the my requisitions speech.
Sorry to create a new requisition.
So here the key the key points of creating a rack, the three steps to create a

requisition are completing direct default, adding items to the cart and reviewing and submitting for approval.
And here's some takeaways.
Comments can be sent to the vendor with the purchase order or displayed on the receipt end 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.
And you can have requisition lines as favorites in or templates. Funding can be split in distributions, can be assigned accordingly.
Is next two slides.
Contain a list of job associating with creating a requisition.
You should be able to access those jobs on the core CT modernization website as they become published.
OK. I will take any questions you have asked in the chat or the Q&A section regarding our first unit.
So Kai, will you kindly share any questions?

Canty, Zakiah 26:58
Yes. First question, so far in the chat or Q&A, it says will we be receiving a copy of the PowerPoint or the material use for reference?
I only ask because I do not use E procurement a lot, only seldom.

Bello-Persson, Maty 27:18
Yes, absolutely you will receive.
A copy of the deck.
It will be posted if not, if it isn't yet the courses page under the training.
Hyperlink.
Any other question?

Canty, Zakiah 27:43
No other questions.

Bello-Persson, Maty 27:45

Thank you. And I do OK.

Canty, Zakiah 27:46

But we have one.

I'm sorry, Maddie. We have one person with their hand up. If you could kindly put your question in AQ and a section I can read that out loud and have that answered for you.

Bello-Persson, Maty 28:21

I need to add a question on the Q&A.

OK, it says.

Can you show how to add template?

There is a job aid that will help you with that.

Unfortunately, we don't have access to a live environment right now, so my recommendation is to go into the Corset team modernization Web website and.

That job should already be posted.

If not.

It's actually.

A feature that we have in the.

Classic improper version and it works exactly the same. If you want to go in there and look. It's just that the look is different, but the functionality is exactly the same. I hope that helps.

Do it. Any more questions?

Canty, Zakiah 29:40

Nothing, nothing else.

Bello-Persson, Maty 29:44

OK.

You're welcome.

Alright then, let's move on to 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. You will familiarize yourself

with management, requisitions, actions.
Learn how to find, edit, and update requisitions as needed.
And understand how to navigate the updated interface.
For more streamline experience.
You go to manage your positions, you will start on the employee’s self-service homepage and select core City financials. From that menu, click the E procurement tile and then click the manage your position style.
Manage requisition style opens to the my requisitions page, which displays a list of breaks created by the user in the last seven days.
In all statuses but complete failures can be adjusted to expand or narrow the search results.
Searching by budget status equal error will bring up requisitions and budget error.
Drop down list at the left to see the available options for a particular reposition.
The actions that display are detailed.
Copy View, print, cancel edit and the approvals.
And they will display according to your security rules.
Letting the details action will bring up the rec summary.
Direct lifeline that shows when the rec is in the process.
What are the records in the process and a list of direct lines?
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 default to requisition and the new rack and will need to be updated as required as well as the new rack type related custom pages.
Please note that punch out requisitions cannot be copied.
You print just as usual.
The selection will provide a printable view of the requisition and you will be prompted to select whether you'd like to see the distribution lines as a reminder, the state of Connecticut has adopted eco-friendly policies and discourages printing.
We recommend electronic review, but the option to print is available.
Cancel the selection lists.
You cancel our reposition if you have the proper security role.
The process is very intuitive and short as you can see on the screen.
Edit use this selection to modify a rack.
You will be prompted with a message advising that the approval workflow might be reinitiated.

Click OK, then click check out to make your changes.
Edit the requisition.
Click either direct defaults link or the schedule details line details pages accordingly.
Approval chain action allows you to see the different workflow approvers and levels and shows you where the records in the process.
We review the my requisitions page shows you a list of wrecks created by the user in the last seven days and all statuses but complete but complete, or a list of search results. By adjusting the filters, you can perform different actions on each wreck.
According to your SEC.
Rules those actions are listed on the right on the screen.
Here is a list of jobs pertaining to this unit management positions which will be published on the Core C team site as they become available.
And at this point I will take any questions on Unit 2 with Zakiah's help.
If there are any questions.
And you need 2 please.

Canty, Zakiah 36:08
We don't have any questions currently.
For unit 2.

Bello-Persson, Maty 36:15
Or in the case we will move on to our next unit, which is approval.
And you need 3.
We will cover the streamline fluid approvals process.
Key topics will include navigating the fluid approvals 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 E procurement tile and then the approval style.
Approval so with.
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.
What this session we will explore how to navigate the approval screens and process approval actions effectively.
These streamlined process enhances visibility for approvers and ensures compliance with the state's procurement policies.
Pending approvals, the approval style will open to this age. Here the approver can see all the pending financial transactions approvals according to their security. The accounts for each module, in this case Rex and POS and a total count.
Clicking on a transaction will open its details from the Approver's perspective.
And the requisition approval page, the approval has the options shown few approval chain approval line details view, printable version, Edit, requisition, approve, deny and more.
Which opens two options for push back, hold and request information.
Taking the approval change Ling.
Displays the very the very steps in the approval process along with the current approval status. Clicking the multiple approvers link will display the users on that approvals level.
Approval 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 distributions detail.
You printable version.
This option is self-explanatory.
A message will display asking whether you like the distribution child feels populated on the output.
We recommend to review this information electronically to comply with the states green policies, but the option to print is available.
I have a question opens theatre requisition page, allowing the approval to make changes to the rec. Upon clicking check out.
The arrow opens up the schedule details and line details on the same page as two separate tabs.
The schedule details.
Option also displays the distribution.
Approve requisition once reviewed for accuracy.
The approver can click approve.

This will prompt a comments box.
Comments are optional here for the approval action.
Clicking submit will approve the request.
It will drop for that level of approvers 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 requester receives an alert notification and the requisitions workflow ends.
Making more displays additional options, including push back.
Hold and request information.
Comments are required for all three of these functions.
There are related job aids at the bottom of this slide, which can be accessed on the modern station website as they become available.
These are the jobs related to the approvals unit, which as mentioned before, can be accessed on the modernization page once published.
Now with the help, I will take questions for Unit 3.

Canty, Zakiah 43:24
And you will give him a minute or so.
See if anyone has any questions.

Bello-Persson, Maty 43:26
Yeah.
Absolutely and I think.
I'm sorry for piano.
Still has her hand up from before, but unless there's another question that she can place in the chat.
We're in the QA. I'm sorry.
OK.
So if you all set then you can put your hand out.

Canty, Zakiah 44:03
OK.

Bello-Persson, Maty 44:06
Put your hand down, please. Yeah.

Canty, Zakiah 44:07

You.

Alright, no one has entered any questions as of now.

Bello-Persson, Maty 44:18

That will take us onto Unit 4. If there are no questions here.

Canty, Zakiah 44:19

Week.

Bello-Persson, Maty 44:26

Which is receipts.

In this unit, we'll review creating and managing receipts using the new Fluid user interface, highlighting storm of the navigation changes.

I can overview 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 the casual receiver role to receive.

Casual receivers are limited to only receiving POS that source from requisitions they created.

Navigation to adaptive receipts from the employee self-service homepage. Select query financials, then click the in procurement tile and then click the add update receipt tile.

On this page you have the options to add a new receipt, an update, an exist 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 lines.

And manage receipts.

Click the details icon to access the receiving page.

Once you click the add new receipt when adding a new receipt of course.

Ensure the right the right business unit is populated and the PO receipt box is checked.

The receipt ID value is system generated.
You can just click add at that point.
Here the user enters the search criteria values to locate the PO and receive its required lines.
On the receiving page.
The user enters values such as received quantities and shipping details.
After placing 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 core receipt date value must be added.
That's appropriate.
And the existing receipt 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.
He accessed the my receipts page, select core City financials from the employee, self-service Home page, then click the procurement tile and then the my receipt style.
Under my receipts page, the user can view active receipts they have recently created.
Search criteria filters can be adjusted to expand the results. Users can perform several actions such as view details, delivering information, and others by clicking on the icon.
Please know that some icons are displayed but are currently disabled.
And then maintain activity and comments page, you can track activity history and add comments.
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 needed, and these two pages.
Edit Receipt Icon directs the user to the ADD update receipt page where they can make modifications to the selected receipt.
And then some takeaways receiving is required for all purchase orders.
A receipt is created to accept items or services received.
Comments can be entered.
The receipt is then saved and the payment process continues and the accounts

payable module.
Prerequisites to receive are 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 court. If you don't currently perform receiving tasks, that means someone else in purchasing is doing.
Wrap things up according to our training goals.
You now have knowledge on how to create a wreck in fluid.
How to manage existing wrecks? You have a handle on wreck approvals and can create a managed and managed receipts according to your security.
Right now I will take any questions related to receipt or to any part of the training. If you have any.

Canty, Zakiah 52:05
Yes, Maddie, I think you just spoke on this, but I will ask the question anyway.
It says hi is the my receipt function a new function?
I have not seen this function before.

Bello-Persson, Maty 52:20
This is not new the the actual page must look new to you, but it's nothing but they result of the error.
They receipts when you enter your your filters on that page today.
It is not new.
It's something that all the agencies do as is required feature and or functionality, and if you're not doing it in Ebro, that means somebody else, somebody else in purchasing is doing the receiving.
What the hell?

Canty, Zakiah 53:05
Second question, will there still be the option to receive a partial order?

Bello-Persson, Maty 53:12
Yes, there will be that option to receive partial and I believe.
To reject as well.
Yeah, whatever you have.

The access to today you will have with the new version. I just wanted to show you like where the the fields are located and how to navigate to it, but it's essentially the same functionality.

Canty, Zakiah 53:44

Question #3 will add update receipts only be found under E procurement or can we still access it under the purchasing tab?

Bello-Persson, Maty 53:54

Yes, I believe I mentioned on one of the slides that receiving is the functionality that can be found in both modules.
April, as well as purchasing.
Questions in any of EU women.

Canty, Zakiah 54:30

I believe that's all, Maddie.

Bello-Persson, Maty 54:34

OK, you guys are pretty quiet audience.
So let's go on to our post training follow-ups line, right.
So we encourage everyone to log a footprints ticket for your support needs.
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 fun.
Footprints. So it attaches the e-mail to the ticket.
And not if it notifies the help desk that you have responded.
That is the process.
Tickets are routed then directly to the team that handles the module for faster processing. If you are in need of footprints access, please e-mail the readiness mailbox. Entering footprints footprint access in the subject.
If your e-mail domainsct.gov you have access to footprint. If you have an e-mail address that does not end in ct.gov, you can e-mail the readiness snow box for the help desk to create a footprint sticker on your behalf.
Please watch for emails from footprints, even if you don't have footprints access, you

can still respond to the e-mail which will attach to the ticket and notify the help desk you have responded.

Please, please, please refrain from reaching out to the module leads as we need to document every issue that come in and their resolution.

And lastly, congratulations, you have successfully completed the E Procurement Fluid User interface course.

Kindly take a moment to complete the training evaluation.

We really appreciate your input and.

As previously mentioned, the course material will be available for reference and will be posted in.

The modernization website.

For additional information, please visit the courses material site.

And if you have any questions at all, please.

Access footprint and log your your footprints ticket.

We thank you so very much for your participation and have a good rest of your day.

You're welcome.

Canty, Zakiah 57:54

OK.

Thank you, Maddie, for that beautiful training.

Bello-Persson, Maty 57:59

Thank you.

Canty, Zakiah 57:59

I'm gonna going to end our live now.

Bello-Persson, Maty 58:04

He said we want to participate.

stopped transcription