L200EP008 - eProcurement-20241107_190604-Meeting Recording

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started transcription

Bello-Persson, Maty 0:17

You had user interface. When you hear the term fluid, think of the core CT pages adapting to the various screen sizes of different mobile devices such as cell phones and tablets.

Their fluid user interface is responsive and easy to use.

It has an easier tile based navigation and caters to a variety of users in different roles.

Turning objectives at the end of the course, you will have the ability to create and manage your positions, understand the approval process and create a managed receipt in the new Fluid user interface.

Here's 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 creative requisitions, managed requisitions, fluid approvals in April and receipts.

Unit 1 and the first unit. We will cover the steps to create a requisition and fluid user interface.

And here we are. The three steps in the process of creating a reposition are entering the requisition default, adding items to the cart and reviewing and submitting your requisition for approval.

Here's a new look at the brand new fluid interface.

On this screen we see the quart City financials module tile. Clicking the E procurement tile gives users access to those actions that their security allows. Within the module highlighted on the screen are the tiles we'll be reviewing today.

When to use a procurement, we use EPO requisitions when ordering items from the catalog. When buying office supplies from a pantal supplier, when there's a need for special requests such as an item not in the catalog or when submitting, a more specialized requisitions such those listed on the.

Use our navigation to create requisitions.

1st we select the course CT financials and the homepage menu.
Then click the E procurement tile and then click the create requisition tile.
Navigation will land you here, and the requisition defaults page, formally known as the fine requisition.
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 business unit for the rec you are creating.
And the rec name, you can enter the value as your agency decides the Rep will be identified.
Failing to enter a red name will populate.
Calculator.
Her rectite must be determined at this time. Once the wreck is submitted, the rector cannot be changed.
There's no need to enter supply information or account code for catalog and punch out orders as those values populate from the supplied items added to the cart.
If the requester is not the buyer assigned to the requisition, a buyer must be entered on this page also.
Are you not charfield are now divided into 3 tabs as shown here 1-2 and three the details tab is used for inventory organizations and the asset management tab is used to enter assets information.
The default options has been removed from this page.
And that action is now handled via the Mask Change link, which we will cover later in the training.
Types.
It is important to select the correct position type at this stage. Once your requisition is submitted, the rectangle on the left you will find the least.
A list of job aids for the different requisition types. They can be accessed on the query city modernization website as they become available.
This here is a summary of our work types and their definitions, and this deck will be posted on the Corsi Team Modernization page after the trainings so you can have it for reference.
Non selecting each red type.
A distinct hyperlink populate underneath it.
Click in.
It will open to custom pages that require your input. On this example the red type is

requisitioned and the hyperlink that populate 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 Reg, the buyer must be entered.
And the right people to avoid issues with sourcing the right to a purchase order.
Distribution default as previously stated, the distribution default section has not. Is now divided into 5 tabs to allow for a better appearance on mobile devices. Char Fields 1-2 and three display the regular child fields as shown on the screen.
As mentioned earlier, it's used for inventory items and the asset asset Information tab is to enter the asset management values. You can also click show all to display all the fields, all tabs on the same page.
Once finished entering the red default, you will click done which brings you to this page.
Here you will select the requisition method from the left depending on the rec you are creating. These are the same options we have available today in the classic version of the procurement.
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 the section to search the catalog by contract ID, but we are actively working on adding it again and this will probably happen shortly after gold live not making any promises, but we're working on it.
In the meantime, you have plenty of fields to narrow or expand your search criteria.
Until we get that section back on the page if possible.
To search by the complete CN number or item ID, ensure the operant is set to equal and not contains any.
We are actually actively working on having that operant default that is equal.
Another workaround, if that is not done by the time we go live, is to enter the last set of digits from the item ID in between percent sign wild card.
This is the advanced search page with the keyword pads enter in the description field.
Explain a set of result of all cattle items containing the word pads and their description.
Left panel are the results.
Displaced 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.
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.
Details page includes a long description of the item, which can help determine whether you chose the correct item on your recline. The item ID represents the catalog management 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.
This is a new feature that can be very useful during crunch time.
One priority ship quickly.
About pricing, if you have any questions at all about contract pricing in the catalog, you may contact a contract specialist at DAS Procurement.
Web suppliers to purchase office supplies navigate to web suppliers and select one of the punch out option.
You will then be directed to their site where you can search for items and add them to the cart.
If you notice the web suppliers option is not available.
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.
I can continue to check up on the baby Mason site or submit card on Suburbans. We direct you to the Fluid Checkout page to submit the requisition for approval.
Show requests.
For special request, click the special request option to add items that are not in the state catalog using this page to describe, describe and use this page.
I'm sorry to describe and include code in the requisition. Some fields are required and they are identified with asterisk or other field.
Other values populate from the right default.
You can choose to share additional information by typing it in the comment text section.

Which you can make visible on the PO we see about your pages by checking those boxes.
Use the fixed cost service if you option if you know the cost of the service and the requisition.
For example, repairing an electrical panel will cost $1500.
Select the timer option.
For acquisitions 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.
Use variable call service when the time required to complete the repair or service is unknown and no materials are needed.
For example, troubleshooting computer issues at $125.00 an hour, but you don't know how long it will take to complete the service.
You can use the template option to create and manage templates to order popular items.
The price of template items updates with each catalogue revision.
The favorite option is selected to create, group and manage favorites.
The price of favorites also update with each catalog revision.
All templates in favorites hijabates to perform those tasks and they can be accessed on the corset, team or on station page as they become published.
Create the shopping cart icon for an overview of your cart.
The car 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 or submit your order even if the CART icon shows a zero, we recommend to always clicking it to check for any unneeded items left from a previous session.
Or requisition.
This is a known.
It doesn't happen very often, but we're working with them to get every solution.
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.
The line details page will display the values of the line item.
Here you can indicate whether the rack is for goods or services.

You can see any additional information on the line supplier manufacturing information is available in purchasing authority of the line.
Purchasing Authority defaults a contract and it is up to the user to change it accordingly.
A purchasing authority of contracts requires a contract ID, except for the as bid and POS or PSA rect types.
Could be left cling.
This all works the same as it does today.
Select the schedule details tab to access detailed shipping information.
This section is used to manage and track the delivery of requisition line items such as dates, quantities and ship to locations for the goods or services.
The schedule detail staff also provides access to the distribution chart field.
Funding access the distribution section on the schedule, details tab and click the plus sign on the right to add another distribution for the line.
Add or replace the chart field values accordingly on the added lines and allocate the percentages for each line appropriately.
All distribution lines on the right line must add up to 100%.
Has changed. As mentioned earlier, the default options box has been removed from the requisition defaults page.
This functionality is now handled here via the mass change action.
The load values from default button populate values from the requisition default.
Changes made to field on the mass change page will override the requisition default.
Edit Multiple lines on a wreck. Select the desired lines by checking the boxes in front of each line.
Or use the select all checkbox if the intent is to make the changes to all line.
Click the actions drop down and select mass change.
On the mass change page, click the load values from default button to review the current child fields from direct 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 lines and schedule not already sourced to POS. Click OK to do so.
Line comments and attachments. Click the line comments icon to open the line.
Comments in 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 pages or voucher pages accordingly with the appropriate flags are checked.
Users can also add attachments that allow requesters to communicate supplemental information and requirements to suppliers, approvers, and other corset users.
These comments are always tied to the requisition.
Use. They add attachments button to include supporting documentation with the requisition.
The process is intuitive, but the steps on the screen and on the job page, which can be accessed on the core CT modernization site.
Save and submit.
We currently have two buttons, one that's called Save later, and one that's called save and submit, but with the fluid interface we'll there will be called just save or submit.
The save button, save the requisition and assign it a Wick ID, but will not initiate approvals workflow. The submit button will state the requisition, start the approvals workflow and generate a confirmation.
Peach.
The confirmation page displays a summary of the requisition, a link to review, a printable version.
A link to review the approvals.
Want to edit the requisition?
Want to access the my requisitions page and want to create a new requisition?
And here are some key points.
The three steps to creative acquisition are completing their requisition default, adding the items to the card, and reviewing and submitting for approval.
Some takeaways for this unit.
Comments can be sent to the vendor with a purchase order or displayed on the receipt and all the voucher attachments can be included and sent to the supplier with purchase order that are dispatched via e-mail.
Confirmation page provides a summary of the rec and confirms it has been successfully submitted.
You can save requisition lies as favorite 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 of Team modernization website as they become published.
And I would take any questions you've asked in the chat or the Q&A section regarding our first unit, the Kia.
Will you kindly share questions and if there are any?

Canty, Zakiah 25:02
Don't have any questions as of yet.
If you wanna wait a minute and see if someone has a question.

Bello-Persson, Maty 25:09
Sure, give it a moment.

Canty, Zakiah 25:30
I think we're all set, Maddie.

Bello-Persson, Maty 25:32
OK.
Thank you that case.
Let's move on to Unit 2.
Manage requisitions.
In this unit, we will explore how to manage existing regs, perform key tasks using the fluid interface, and discuss navigation changes. You will familiarize yourself with managing requisition actions.
Learn how to find, edit, and update requisitions as needed.
And understand how to navigate the updated interface for a more streamlined experience.
Navigation to manage requisitions, we will start on the employee self-service homepage and select core City Financial.
Then we click the procurement tile and then click the manage requisition style.
Manage your acquisition style. Opens the my requisitions page, which displays a list of Recs created by the user in the last seven days.
In all statuses, but complete filters can be adjusted to expand or narrow the search results.
Searching by budget status equals error will bring up Recs in budget error.

I find this very useful.
Actions click the action drop down list on the left.
Used to seeing it on the right. Now this with fluid is on the left and you see the available options for particular acquisition. The actions that display are detailed copies. You print, cancel, edit in the approvals and they will display according to your security rules.
Selecting the details action will bring up direct summary direct Lifeline that shows where direct is in the process.
And a list of direct lines.
Copy action 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 rec type will be fault to requisition on the new rec and will need to be updated as required as well as the new REC type related custom pages.
Please note that punch out requisitions cannot be copied.
As usual, this election will provide a printable view of the rack and you will be prompted to select whether you like to see the distribution lines on it.
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 this selection.
Let's you cancel our requisition if you have the proper security role.
The process is very intuitive and short and sweet.
Edit.
Use this action to modify a wreck. You will be prompted with a message advising that the approval workflow might be restarted.
Click OK, then click check out to make the changes.
Edit Direct click either direct default link or the schedule details line.
And sorry, schedule details, line details pages accordingly.
View approval chain this action allows you to see the different workflow approvers and levels and shows you where the rec is in the approval process.
And here we have some key points.
To review this unit, then my requisitions page shows you a list of rec created by the user in the last seven days in all statuses, but complete, back complete, or a list of search results. By adjusting the filters.

You can perform different actions on each rec according to your security role.
Those actions are detail view details, copy view, print, cancel.
Edit and view approval.
Here is a list of Job 8 pertaining to Unit 2, which will be published on the Corset Team site.
And do we have any questions on Unit 2 manage requisitions?

Canty, Zakiah 32:16
We don't have any questions.

Bello-Persson, Maty 32:22
Let's let's give it a minute to see if anybody.
Wants to ask anything on the Q&A section.
OK.
It doesn't seem like there will be any questions for this unit, so we can move on to the next one.
23 approvals and Unit 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.
Play.
Navigation for approval.
Start on the Corsi T financials option of the home page.
Click the E procurement tile and then the approval style.
For an overview of approvals we have that APPROVERS can officially 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.
Explore how to navigate the approval screens and process approval actions efficiently.
These streamlined process enhances visibility for approvers and ensures compliance with the state's procurement policies.

Approval the approval style will open to this page.
Here the approver can see all the pending financial transactions approvals according to their security.
Accounts for each module, in this case, purchase orders and requisitions.
In a total count.
Clicking on a transaction will open its details from the Approver's perspective.
And their requisition approval page, the approval has the options shown.
View approval chain approval line details you printable version editor position approved deny and more which opens to options for push back, hold and request information.
Picking the approval chain link displays the various step in the approval process along with the current approval status.
Clicking the multiple APPROVERS links 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.
New printable version.
Again, this option is self-explanatory.
A message will display asking whether you like the distribution chart feels populated on the output.
As stated before, we recommend reviewing this information electronically to comply with the state screen policies, but the option to print is available.
Making edit requisition opens the edit requisition page, allowing the approver to make changes to the rack. Upon clicking check out.
The arrow on the right.
Opens up the schedule details and line details on the same page as two separate tabs.
The schedule details also display the distribution.
Sorry, that's on the next slide.
OK.
Thank you.
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 rec, it will, the rec will drop for that level of approval and will show up on the next level.

You can deny prompt the user to enter approver comments before clicking submit.

To deny the requisition.

Comments are required for deny.

The request to receives an alert notification and the requisition workflow end.

Making more displays additional options including push back, hold and request information.

Comments are required for all three of these actions.

There are related job based at the bottom of this line which can be accessed on the modernization website.

As they become available.

These are the jobs related to the approvals unit, which I'm as I mentioned earlier will be posted on the page and you can access them there once published.

And now with the Kaiser, I'll take any questions for Unit 3 at this time. If there are any.

Canty, Zakiah 40:04

No questions yet.

Bello-Persson, Maty 40:06

No questions, OK.

We have a quiet audience today.

Canty, Zakiah 40:12

Yeah, I was using.

Get a few questions.

Bello-Persson, Maty 40:16

I at least.

OK.

Well, since there aren't any questions, we can move on to our last unit which is receipt.

OK. And this unit will review creating and managing receipts using the new Fluid user

interface, highlighting some navigation changes.
And overview of the unit.
Receipts are required for all purchase orders, whether for goods or services.
Receiving can be done in both purchasing and your procurement modules.
The PO must be dispatched and the user needs the general receiver or casual receivable to receive.
Casual receivers are limited to only receiving POS that source from requisitions they created.
Navigation to receipts from the employee self-service homepage.
Select the core city financial tile. I'm sorry option. Then click the E procurement tile and then click the add update receipt style.
On this page you have the options to add a new receipt or update 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.
Unmanaged receipt.
Click the details icon to access the receiving page.
Adding a new receipt 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.
You simply click add.
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 as applicable.
Users may also need the up to update information like date and location of delivery date to complete the process and generate the receipt in the system.
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.
Can we see enter the receipt number or sufficient information on the search criteria, then click search?
And the result you can review and select the relevant receipt to view or update by clicking on it. Then click the details icon to to access the receipt.
Navigation to my receipt to access the my receipts page, select the four city financials option from the Employees self-service homepage.

Then click the I procurement tile and then click the my receipts tile.
My receipt page the user can view active receipts. They have recently created the search criteria. Filters can be adjusted to expand the results and users can perform several actions such as view details, delivering information and others by clicking on the icons.
Please note that some icons are displayed but are currently disabled.
Contain activity and comments page. You can track activity history and add comments.
And they 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.
Let me see. Icon directs the user to the add active receipts page where they can make modifications to the selected receipt.
Yeah, my seats.
Let's to recap the receipts unit.
Receiving is required for all purchase orders.
A receipt is created to accept items or services received.
Comments can be entered.
Receipt is then saved and the payment process continues in the accounts payable module.
Prerequisites to receive are the associated PO must be dispatched and the user must have either the casual receiver role 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.
And lastly, if you don't currently perform receiving.
That means someone else in purchasing it.
So if this is new to you, that means somebody else have the roles in it's performing these tasks and most likely.
Those users will be in purchasing.
Umm.
Some training takeaways.
To wrap things up, according to our training goals, you now have knowledge on how to create a wreck and fluid how to manage existing wrecks. You have a handle on REC approvals and can create and manage receipts according to your security.
But do we have any questions on the receipt unit or on the training altogether?

Canty, Zakiah 48:55

Maddie, we have our first question.

Could you export some data to excel for review?

Bello-Persson, Maty 49:05

You should be able to do the same things that you do now.

In in.

In classic.

Functionality is not lost, it's enhanced.

Canty, Zakiah 49:29

Question #2.

Is there an option to upload or attach a receipt?

Bello-Persson, Maty 49:37

Attach a receipt.

I don't understand the question.

To the to work.

Canty, Zakiah 49:48

She may. She may be talking about additional documentation like when they have their. Yeah, when they have like RFP or something like that.

Bello-Persson, Maty 49:52

Oh oh.

Thomas the Tank is an attachment.

Oh, OK, you know what?

We'll have to look into that.

I.

I don't remember off the top of my head if we have our comments and well, we do have comments, but I don't know if we have attachments on the receipt section.

Yeah, I'll. I'll get back to you on that.

Remind me to answer that.

Canty, Zakiah 50:26
OK.

Bello-Persson, Maty 50:26
Yeah.

Canty, Zakiah 50:32
Question #3.
I want to verify that the navigation tree will now be replaced by tiles. Or will the navigation tree still be accessible?

Bello-Persson, Maty 50:50
So for now we have tiles.
As the main source of access in our pages in April.
But the the navigation bar which is now located on the right is exists.
There I am not sure if it's going to be released.
I believe for most modules it will be released because not all modules are completely fluid.
But yeah, that's I I will look into that. I as as of now, yes, both tiles and navigation are available.
Coming go life. Not sure.

Canty, Zakiah 51:41
Question #4 if we have questions on any.
Of the sections at a later time, who should we address the questions to?

Bello-Persson, Maty 51:54
First, visit the modernization website to see if your answer if if you can find your answer there. If not, you can place a ticket via footprints and the help desk will reroute that ticket to the right person.

Canty, Zakiah 52:18
Question #5.
I do have questions on requisitions with assets.

If they are handled differently due to equipment or price of equipment.
Basically alerting our asset manager from requisition approval to purchase order so he or she is aware of the asset equipment coming in to process asset tax and receiving items.
At the end of the process.

Bello-Persson, Maty 52:54
If you have.
Acid.
Being requisitioned that information should be on The Reg and we have those tabs that we saw under distribution char fields which are for asset management.
All that that's related to to assets, its transfer from the rec to the PO to the voucher to the receiver everything flows.
As long as it's under rack, it will flow to the other module.

Canty, Zakiah 53:32
It is also routed to the proper person that needs to approve it.
I think she is also referring to some type of notification for the asset people that need to approve that.
We don't have a notification for that right, Maddie?

Bello-Persson, Maty 53:54
There's the workflow.
And.
Once, once you do a requisition and you submit it for approval, the approval receives a notification alert or a notification action.
That they do have a requisition to approve now.
It's not going to say that it's an asset requisition, but if they review it for approval, they should see it under and they asset information tab that it is.

Canty, Zakiah 54:31
Question number six, can we get a copy of the PowerPoint for new hires?

Bello-Persson, Maty 54:38
Absolutely. There's trainings are all being recorded and they will be placed or they

are being placed in the modernization site.
Under training materials.
Additional questions.

Canty, Zakiah 55:14
OK.
I believe that is all that we have right now.

Bello-Persson, Maty 55:16
No.
OK.
So in that case, I'm glad you placed the.
The follow-ups slide because we do have we do want to encourage you to log the footprints.
Ticket for all 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 at the help desk will communicate through the ticket.
You can respond to the e-mail from footprints, so it attaches the e-mail to the ticket and not.
Ifies the help desk, the help desk that you have responded.
That is the process.
Tickets are routed directly to the team that handles the module for faster processing.
If you are in need of footprint access, please e-mail the readiness mailbox.
Enter a footprint access in the subject.
If your e-mail domainiscp.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 help desk for the help desk to create a footprint sticker on your behalf.
Please watch for emails from footprints, even if you don't have footprint access, you can still respond to the e-mail which will attach to the ticket and notify the help desk that you have responded.
Ian, please, please, please refrain from reaching out to the module leads as we need to document every issue that comes in along with the resolution.
And as we come to the end, congratulations, you have successfully completed the procurement fluid user interface course.

Kindly take a moment to complete the training evaluation.
We really appreciate your input on that.
As previously mentioned, the course material is available for reference and will be posted in the course IT modernization website.
For additional information, please visit this site and if you have any questions.
Something you can't find there. Please create a footprints ticket. We thank you so much for your participation today and wish you a good rest of your day.

Canty, Zakiah 57:52
Yes, thank you for attending.

Bello-Persson, Maty 57:52
You're welcome.

Canty, Zakiah 57:54
Yeah. Everyone saying. Thank you, Maddie.

Bello-Persson, Maty 57:56
OK.
Thank you all for attending. Yeah.
You're very welcome.
You're welcome.

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