



Coding an Asset in eProcurement

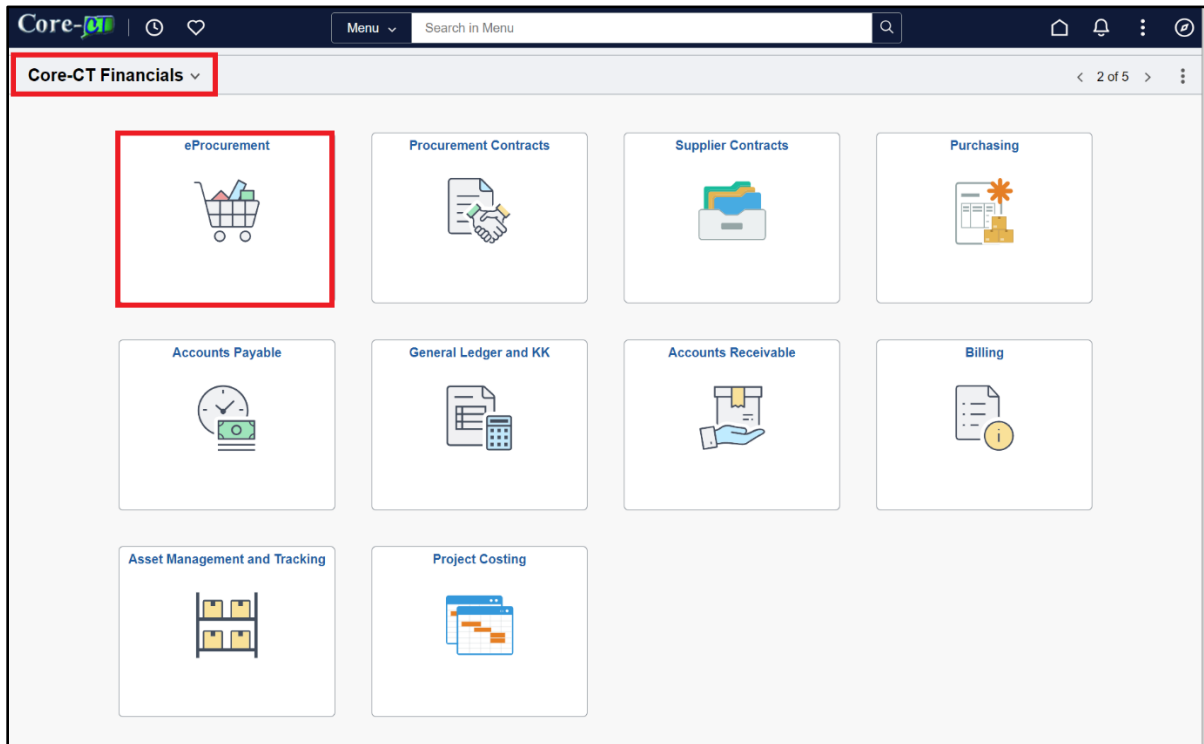
Navigation:



Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisition

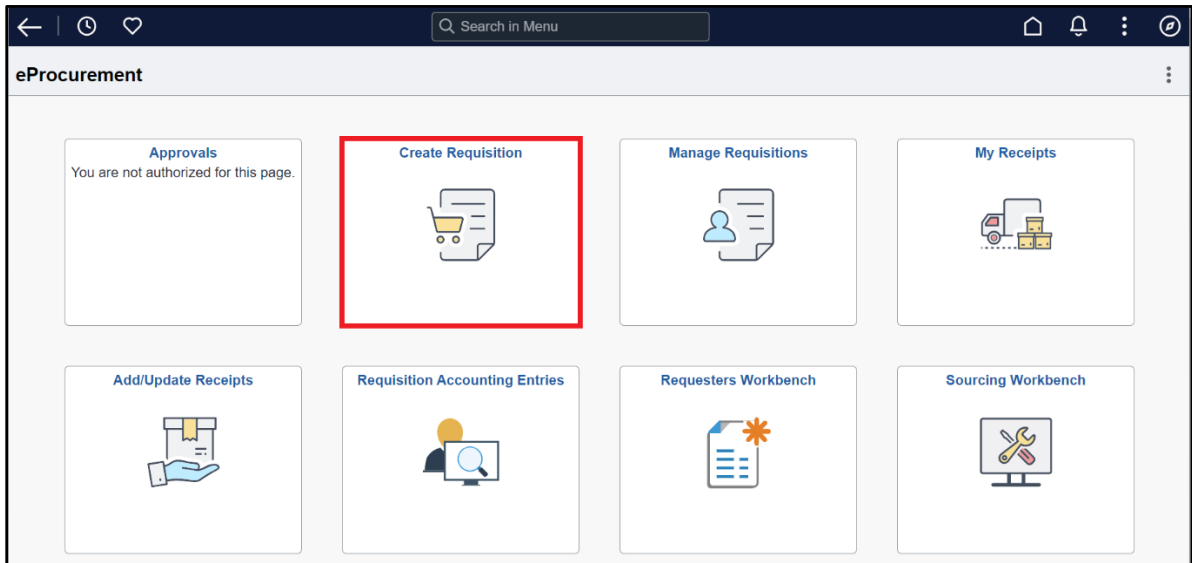
OR

Select Core-CT Financials
Click eProcurement Tile.





Click **Create Requisition** Tile



Procedure:

Choose the Requisition Type: Requisition, ITD-10 or TSR Equipment

The Requisition type determines the workflow routing. The result of an approved requisition will be a Purchase Order dispatched to the supplier with all required approvals accomplished within the eProcurement process.

❖ A Requester, Multi-Requester or TSR Requester can create an eProcurement requisition with an asset.

➤ Requisitions Defaults Page

- When the **Create Requisition** tile is open, it lands the user on the **Requisition Defaults** page, unless the user has access to multiple **Business Units**, in which case they will have to enter the intended BU prior to seeing the Req defaults screen.

Default Entry

Enter BU/Requester

*Business Unit

*Requester

OK



- Enter **Requisition Name**.
- Go to the **Line Defaults** and enter the **Supplier, Buyer, Category & Unit of Measure**.

Requisition Defaults

Header Defaults

Business Unit: AESM1
Requester: [Search]
Priority: Medium
Currency: USD
Requisition Name: [Redacted]
Use Procurement Card: No
Card Number: [Dropdown]
Expiration Date: [Dropdown]
Requisition Type: Requisition
Obligation Amount: [Link]

Line Defaults

Supplier ID: [Redacted]
Supplier Location: [Search]
Buyer: [Redacted]
Category: [Redacted]
Unit of Measure: [Redacted]

Shipping Defaults

Ship To: 093000001
Attention: [Search]
Add One Time Address
Due Date: [Calendar]

Distribution Defaults

1 row

Distribution Line	Percent	Location	GL Unit	Account
1	0	ACORE	STATE	[Search]

- Go to the **Distribution Defaults** and enter the **Account** code, **Fund**, **Program**, **SID**, **PC Bus Unit** & **Project** (Make sure to change the location code to a valid asset location.)

Core-CT

Distribution Defaults

Chartfields1 Chartfields2 Chartfields3 Details Asset Information **Show All**

Distribution Line	Percent	Location	GL Unit	Account	Fund
1	0	ACORE	STATE		

Make sure to change the location ACORE to a valid Asset Location.

Distribution Defaults

Chartfields1 Chartfields2 Chartfields3 Details Asset Information **Show All**

Dept	SID	Program	Bud Ref	ChartField 1	ChartField 2
AES48000					

Distribution Defaults

Chartfields1 Chartfields2 Chartfields3 Details Asset Information **Show All**

ChartField 2	ChartField 3	PC Business Unit	Project	Activity	Source Type

Distribution Defaults

Chartfields1 Chartfields2 Chartfields3 Details Asset Information **Show All**

Source Type	Category	Subcategory	IN Unit	Budget Date	Stat
				03/25/2024	

Distribution Defaults

Chartfields1 Chartfields2 Chartfields3 Details Asset Information **Show All**

Stat	AM Business Unit	Profile ID	Capitalize	Cost Type	Description
			Non Cap		

- Click on the **Asset Information Tab** and enter the **AM Business Unit** and **Profile ID**. Information entered in the **Line Defaults** group box applies to all lines of the requisition.



Note: These are the two key fields for generating an asset. They must be populated if an asset is to be made through workflow (the exception to this being Leased and SBITA Assets).

- Click OK.

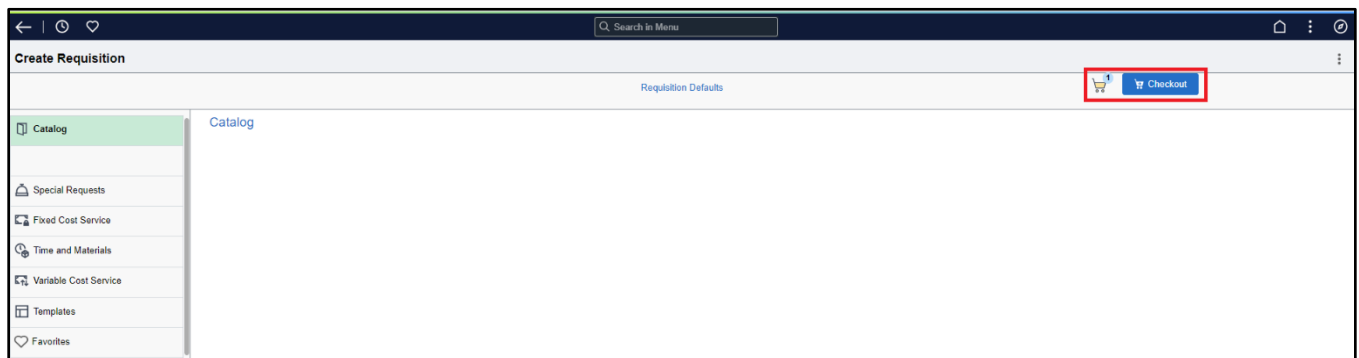
Distribution Defaults



1 row

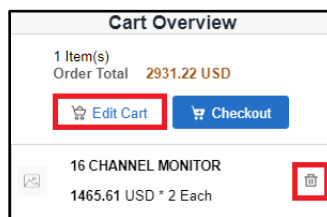
Chartfields1	Chartfields2	Chartfields3	Details	Asset Information	Show All
AM Business Unit ↓	Profile ID ↓	Capitalize ↓	Cost Type ↓	Description ↓	
<input type="text"/>	<input type="text"/>	Non Cap	<input type="text"/>	<input type="text"/>	<input type="text"/>

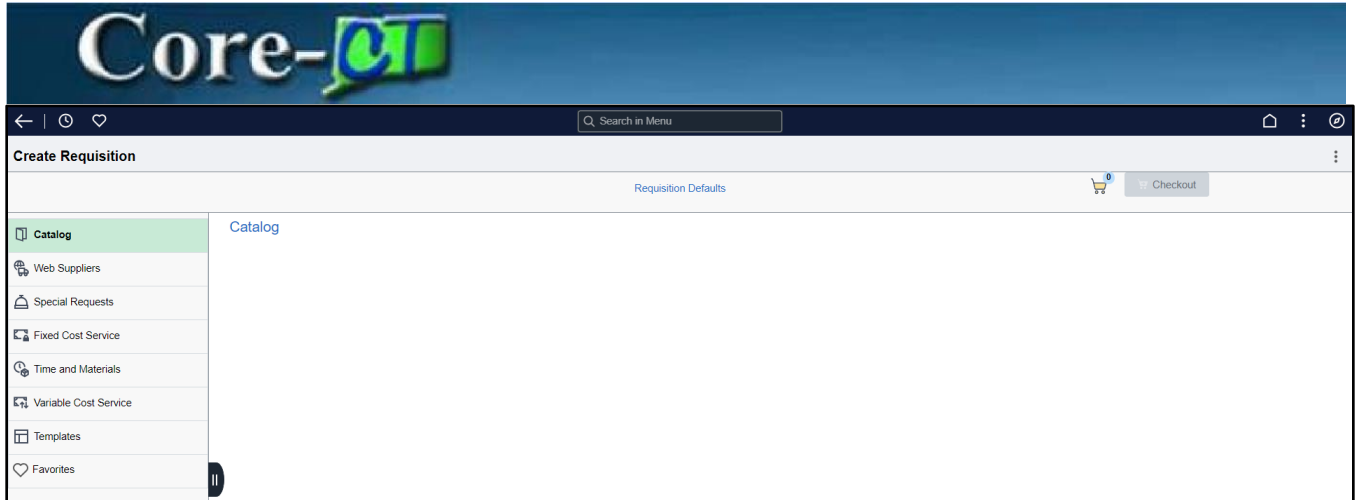
➤ Create Requisition Page

Note: If you initiated a requisition in a prior session but didn't finalize it, the items will still be in your Cart. Before proceeding with a new requisition, please ensure to remove any remaining items from the previous session in the Cart.

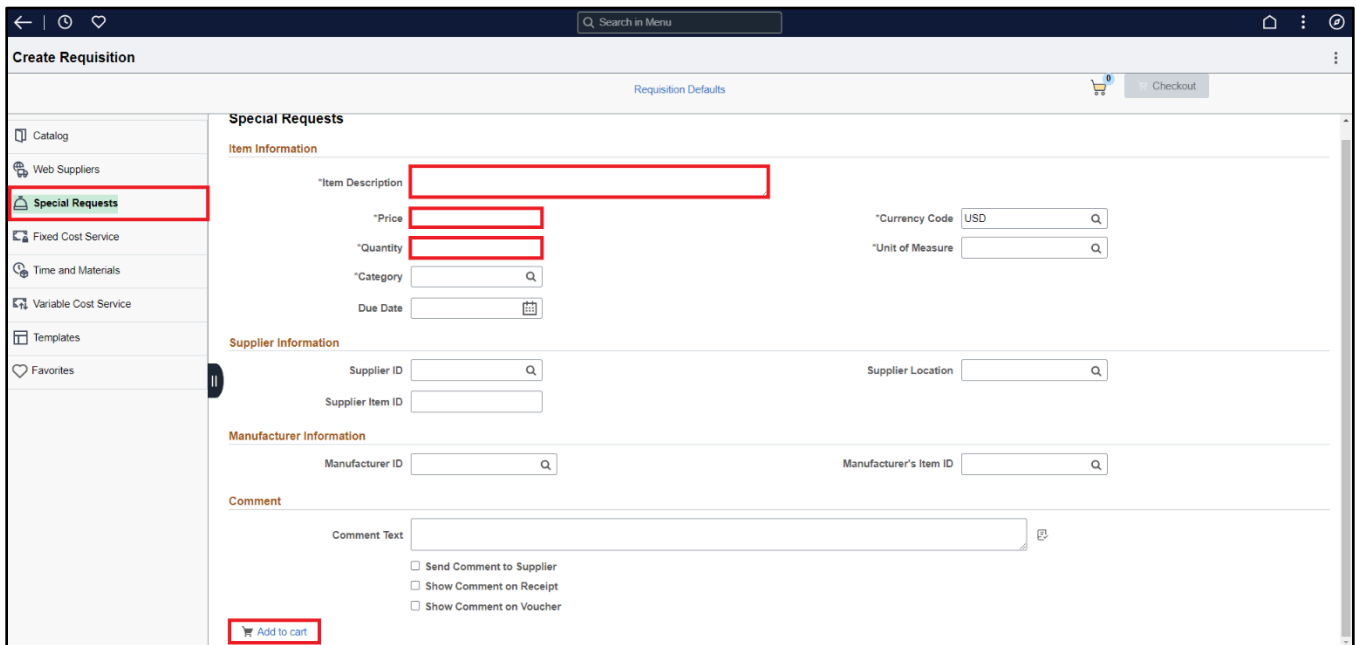


- Click  to bring up Cart Overview.
- Click  to remove items from Cart.





- Click on **Special Request** and enter the **Item Description, Price, Quantity**.
- Click on **Add to Cart**.



➤ Shopping Cart

- Displays with added items.
- Click on **Edit Cart**.



Cart Overview

1 Item(s)
Order Total **1000.00 USD**

[Edit Cart](#) [Checkout](#)

Tech

500.00 USD * 2 Fixed Rate

➤ Review and Submit Page

- Click the **Arrow** to the right of the requisition line.

Create Requisition

Checkout

Requisition Defaults

Order Total 1,000.00 USD

Business Unit AESM1 Agricultural Experiment Sta

Requisition Name

Requester Kaczinski, AES-Kaczinski Lisa

Currency USD

Priority Medium

Requisition Type Requisition

Dispatch Method Print

Obligation Amount

Card Number

Expiration Date

Use Procurement Card No

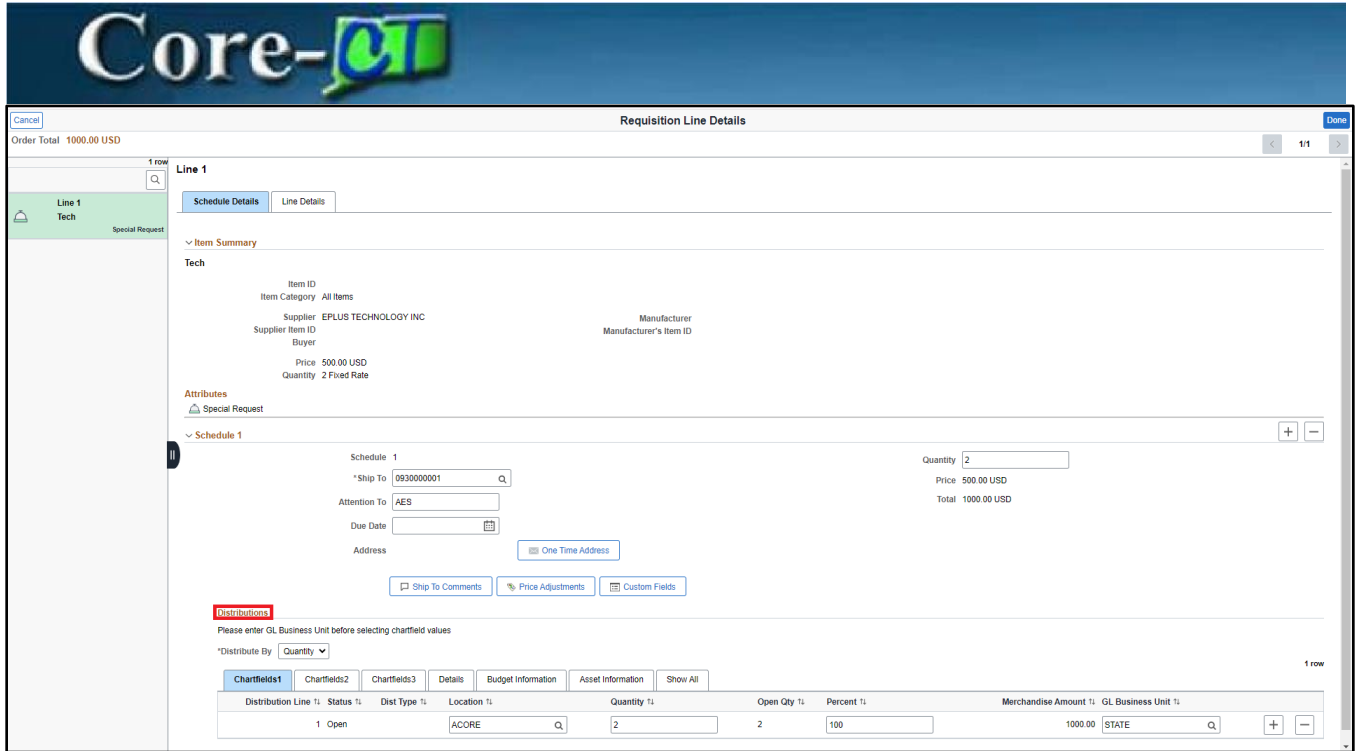
Justification Comments

Requisition Lines Overview

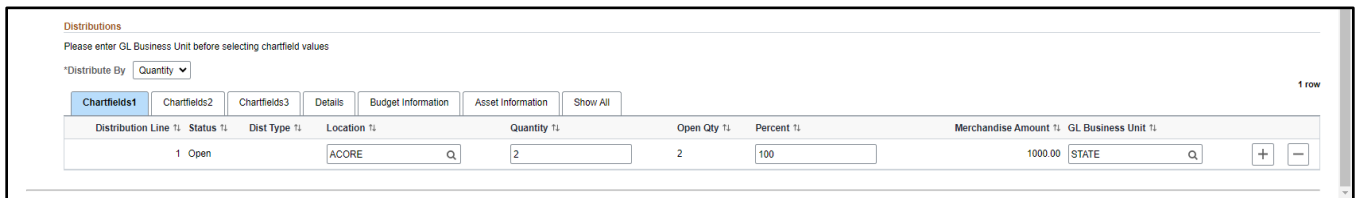
Line	Description	Quantity	Unit of Measure	Price	Currency	Total	Actions
Line 1	Special Request Tech Item ID Supplier EPLUS TECHNOLOGY INC	2	11	500.00	USD	1,000.00 USD	ScheduleDetails

Order Total 1,000.00 USD

- Click the **Schedule Details Tab**
- Click the **Distributions** drop down.



- The **Chartfields** will display.



- Click on the **Asset Information Tab**
 - **AM Business Unit** and **Profile ID** were carried forward to the line.



- Click the **Line Details Tab** to enter **Purchasing Authority** and **Contract** information.

Core-CT

Requisition Line Details

Order Total 1000.00 USD

1 row

Schedule Details **Line Details**

Line 1
Tech
Special Request

Item Summary

Tech

Item ID
Item Category All Items
Original Substituted Item
Long Description Tech
Price 500.00 USD
Quantity 2 Fixed Rate

Physical Nature Goods
Buyer
Buyer Information
Show Configurator

Attributes
Special Request
Expand All Collapse All

Item Additional Information

Device Tracking
Stockless Item No
RFQ Required No
Inspection Required No

Amount Only No
Zero Price Indicator No

Contract Information

Use Contract If Available No
Contract ID
Contract Version
Contract Line
Category Line
Contract Details

- The **Purchasing Authority** defaults to **Contracts**.
 - Enter a **Contract ID** if using this Purchasing Authority.
 - **Click Done**.

Requisition Line Details

Order Total 1000.00 USD

Schedule Details **Line Details**

RFQ Required No
Inspection Required No

Contract Information

Use Contract If Available No
Contract ID
Contract Version
Contract Line
Category Line
Contract Details

Supplier Information

Supplier ID 0000064731
Supplier Location MAN
Supplier Item ID
Supplier Name EPLUS TECHNOLOGY INC
Supplier's Catalog Number
Item Supplier Priority

Manufacturer Information

Manufacturer ID
Manufacturer's Item ID
UPN Type
UPN ID
Procurement Group ID
Primary Unit No
Manufacturer
Unit Allocation Qty

Sourcing Controls
State of CT Custom Fields
Purchasing Authority Contracts

- Select **Submit** to save the requisition and begin the Approval Workflow process.



- Select **Save** to save the requisition, but not initiate the Approval Workflow process.
- Select **Continue Shopping** to add more lines to the requisition.
 - **Click Submit.**

Create Requisition

Search in Menu

Continue Shopping Save Submit

Requisition Defaults

Order Total 1,000.00 USD

Requisition Summary

Business Unit AESM1 Agricultural Experiment Sta

Requisition Name Enter a Requisition name

Requester

Currency USD

Priority Medium

Requisition Type Requisition

Dispatch Method Print

Obligation Amount

Card Number

Expiration Date

Use Procurement Card No

Justification Comments

Requisition Lines Overview

Select All Actions

Line	Item	Quantity	Unit of Measure	Price	Currency	Total	Actions
Line 1	Special Request	2	11	500.00	USD	1,000.00 USD	ScheduleDetails

Order Total 1,000.00 USD

➤ The Confirmation Page

Checkout Confirmation

My Requisitions Search in Menu

Print Preview

Requisition Details

Business Unit AESM1

Requisition ID 000005658

Requisition Name 000005658

Last Modified Date 04/12/2024 4:04:44PM

Status Pending Approval

Total Lines 1

Total Amount 0.79 USD

Budget Checked Status Not Checked

View Approval Chain

Next Steps

- Edit this Requisition
- My Requisitions
- Create Requisition

- Click [View Approval Chain](#) to view **Approval Chain**.



Approval Flow ✕

Amount Approval

Requisition 0000005658 Pending

Start New Path

Req Amount Approval

Pending +

AES: REQAMT APPROVER 1 >

Req Budget Approval

Requisition 0000005658 Awaiting Further Approvals

Start New Path

Req Budget Approval

Not Routed +

AES: REQ BUDGET APPROVER >

Req Purchasing Approval

Requisition 0000005658 Awaiting Further Approvals

Start New Path

Req Purchasing Approval

Not Routed +

AES: REQ PURCH APPROVER >

- Click [Print Preview](#) to view Printable Version.

Business Unit: AESM1	Requester:	Status: Pending Approval
Requisition: 0000005658	Requested By: AES	Currency: USD
Requisition Name: 0000005658	Entered Date: 4/12/24	Requisition Total: 0.79
Start Date for Gen Standing PO 2024-04-12		End Date: 2024-06-30
Custom Field 1: EML		

Line: 1	Item Description: AUTOMOTIVE 20 AMPS FUSE - ATM - YELLOW MINI BLADE	Quantity: 1	UOM: EA	Price: 0.79	Line Total: 0.79
Line Status: Pending					
Purchasing Authority: CONT					
Line Comments:					

Ship Line: 1	Ship To: 0930000001	Address:	Shipping Quantity: 1
Attention: AES-	Due Date:		Shipping Total: 0.79
Ship Via: COMMON	Freight Terms: FOB DEST		
United States			

Dist	Status	Location	Qty	Percent	Amount	GL Unit	Account
1	Open	ACORE	1	100.00	0.79	STATE	54060

Dept	Fund	Program	SID
AES48010	11000	00000	10020

Open QTY	PC BU	Project	Open Amt
1	NONPC	AES_NONPROJECT	0

GL Base Amount	Currency	Sequence	Capitalize
0.79	USD	0	N



Requisition Approver’s Query: Ensures all Asset information was entered correctly. (The Query name will be sent out in a Daily Mail when completed.)

Requisition Amount, Budget and Purchasing Approvers will have access to run the Query from the Buyers Work Center to identify any requisition line in pending status that:

1. Has an Asset Account Code and no Asset BU or Profile ID or
2. Has an Asset BU and no Asset Account code or Profile ID

Asset Account Codes:

Account	Account Description	Account	Account Description
54149	Long-term, Non-Capital SBITA	55540	Wells
54150	Controllable Property	55550	Easements/ROW
54152	Controllable Software	55610	Capital-Office Equipment
54153	IT Hardware Controllable	55620	Capital-Medical & Lab Equipment
55301	LT-Post Off Box Lease/Rental	55630	Capital-Educational Equipment
55302	LT-Office Equip Lease/Rental	55640	Capital-Motor Veh Equipment
55303	LT-Equip Lease/Rental-Other	55650	Capital-Highway Machinery
55304	LT-Maint. Truck Lease/Rental	55660	Capital Outlays-Books
55305	LT-Motor Vehicle Lease/Rental	55670	Capital-Transportation Equip
55306	LT-Aircraft Lease/Rental	55680	Capital-General Plant Equip
55307	LT-Watercraft Lease/Rental	55690	Capital-General Agency Equip
55308	LT-Premises Lease/Rent Expense	55700	Capital-IT Hardware Purch/Inst
55309	LT-IT Hardware Lease/Rental	55710	Capital-Telecomm Equip/Syst
55310	LT Utility Systems Lease/Rental	55720	Capital-Research Equipment
55420	Building Sites	55725	Capitalized Software
55430	Farmlands	55730	IT Equipment
55440	Non-Struct Improve-Bldg. Sites	55810	Government Buildings
55450	Non-Struct Improve-Farm Lands	55820	Institutional Buildings
55460	Sites-Park/Public Place/Amsmnt	55830	Armories
55470	Land-Bridge Appr/Rights Of Way	55840	Farm Buildings
55480	Forest Preserves	55850	Highways
55490	Riparian Lands-Fishing Rights	55860	Bridges
55500	Fish Hatcheries	55870	Docks And Wharves
55510	Game Sanctuaries	55880	Sea Walls & Jetties
55520	Land Acquired For Filter Beds	55890	Other Structures
55530	Waterfowl Management Areas	55901	Capitalized SBITA



Note: Leased and SBITA assets (55301-55310, 54149 & 55901) are the exception to the rule and should almost **never** have the AM BU and Profile ID fields populated as they should not be generated through workflow. The agency’s Asset Management team should be directly notified by the requestor whenever a new order for these is made as they are responsible for manually entering the assets at full term value when the first voucher posts. Refer to the [Asset Directive Memoranda](#)

(4-6 Related Accounts but non-asset (i.e. non-controllable; should *never* be paired with a Profile ID or AMBU)

Account	Account Description
51830	ST-Post Off Box Lease/Rental
52511	ST-Office Equip Lease/Rental
52512	ST-Equip Lease/Rental-Other
52513	ST-Maint. Truck Lease/Rental
53011	ST-Motor Vehicle Lease/Rental
53031	ST-Aircraft Lease/Rental
53051	ST-Watercraft Lease/Rental
53311	ST-Premises Lease/Rent Expense
53735	ST-IT Hardware Lease/Rental
54148	Short-term, Non-Capital SBITA
54151	Non-Controllable Property
54154	IT Hardware Non-Controllable
53755	Non-Controllable Software