eProcurement Frequently Asked Questions – November 2024

This document is to assist users with various questions when working in Core CT. We have tried to answer the various scenarios. Most of the questions have detailed job aids on the Core website under the specific Module. Review the responses to see if it applies and assists with resolving the issue. If not, please submit a Footprints Help Desk ticket for further assistance.

Question #1: My requisition created a PO with a status of Open rather than Approved or Dispatched.

Answer: If there was an issue with the Purchasing Authority (i.e., Using a contract ID with a GL purchasing authority) on the requisition when it was ready to be sourced to a PO, the system will still create the PO but with a status of Open so that the Buyer can make the necessary corrections to the PO.

TIP: The PO will then need to be approved and budget checked again before it can be Dispatched to the supplier.

Navigation: Purchasing > Purchase Orders > Add/Update PO

Question #2: **My requisition did not create a PO or some of the requisition lines are missing from the PO. What do I do?**

Answer: Go to the Sourcing Workbench to search for the requestion and the error.

Navigation: Purchasing > Purchase Order > Stage Source Request > Sourcing Workbench

There is a process called Sourcing which takes the requisition and creates a PO based on the information on the requisition. This process runs during Batch Processing (10am,12noon, 2pm, 8pm/overnight). If there is an issue with a line or the requisition header, it will Error in the Sourcing Workbench and will require User intervention.

TIP: Select Reset/Purge from the workbench to allow access to the requisition in Manage Requisitions. This must also be done in order to view the associated contract.

Navigation: eProcurement > Manage Requisitions

Or to view the contract in Procurement Contracts

Navigation: Procurement Contracts > Add/Update Contracts.

Question #3: **Why can I not select the correct contract ID on my Requisition?**

Answer: This usually happens when the Supplier ID on the Requisition does not match the Supplier ID used on the Procurement Contract. This could also be due to the expiration date on the contract where the contract is expired.

Navigation: Procurement Contracts > Add/Update Contracts.

Check that the requisition date is not prior to the Begin date of the contract. A requisition cannot be created prior to the begin date of the contract. Check both the contract and the Requisition and make the necessary changes.

TIP: If the Procurement Contract in Core differs from the Contract in CTSOURCE, contact the DAS Contract Specialist so they may make the corrections in Core.

Question #4: **Why isn't my Requisition showing up in my Approvers page?**

Answer: This could happen for several reasons. First review the View Approvals to ensure the approver is missing from the approval workflow.

Navigation: eProcurement > Manage Requisitions

1. The approver may have received the approval role after the transaction was submitted for approval; if that was the case, re-initiate the workflow by changing something on the requisition, then submit/save again.
2. Contact the agency Core Security Liaison to ensure the approver was set up properly.

Question #5: **My Requisition isn't Budget Checking. What do I do?**

Answer: View the transaction to ensure it is not in Budget Error. Remember that some requisitions **do not** Budget Check (POS/PSA Requisitions and DAS Bids)

TIP: If the Requisition is an emergency and cannot wait until the normal budget check process, put in a Footprints Help Desk ticket and request that the Requisition be budget checked.

Question #6: **My requisition is approved but is not coming up when I attempt to convert it to a Contract. What do I do?**

Answer: Remember that only certain Requisition Types (POS/PSA Requisitions and DAS Bids) will convert to a Contract.

1. First, confirm the requisition type used.

Navigation: eProcurement > Manage Requisitions

Click on View Approvals to view the Requisition Type used and Contract ID assigned:

2. Go to Procurement Contract to confirm if the Requisition has already been converted.

Navigation: Procurement Contracts > Add/Update Contract

Click on Find an Existing value. If the contract exists, it has already been converted. No action is necessary. If the contract is not there and still does not appear when attempting to convert, submit a Footprints Help Desk ticket.

Question #7: **I created a requisition that sourced to a PO. A change order was done to the PO and now I have another PO attached to this requisition. What happened?**

Answer: If the Buyer reduces the quantity or changes the distribution method to Amount Only on the PO during a change order, they will receive a system message. The message asks if the system should return the open quantity to the requisition. If you answer **Yes,** then the system will generate *another* PO with the remaining quantity that was reduced.

Example: The original PO has a quantity of 500. It is changed to an amount only PO which updates the quantity to 1. The system returns 499 back to the original requisition and will generate another PO for that quantity.

The correct answer for this question would be **NO** meaning no action required. The newly created PO will need to be canceled and closed if it is not needed.

TIP: It may be necessary to reach out to the supplier to cancel the newly created PO.

Question #8: **My requisition status is Denied, what do I do now**?

Answer: An email notification will be sent from the approver that *denied* the requisition. The email should contain an explanation for the denial.

TIP: Verify your email address in your System Profile.

Navigate to the FIN Approvals page and locate the requisition that was *denied*. Select the requisition and edit with the necessary changes, then resubmit it for Approval.

Question #9: **When I view the approvals for my requisition they say Terminated in Red. What does that mean?**

Answer: In most cases, this indicates changes have been made while the requisition is in the approval process. When the changes are made, the system terminates the Workflow and creates a new Workflow based on these changes. The Approvers would then approve the new workflow.

Question #10: I was creating a requisition and clicked Save and got this message. What do I do now?

> Page data is inconsistent with database. (18,1)
>
> When trying to save your page data, the system found that the information currently in the database did not match what was expected.
>
> This problem can happen if another user has changed the same information while you were making your changes. Note the changes you have made, then cancel the page. Reload the page and view any changes made by the other user. Ensure your changes are compatible and retry, if appropriate.
>
> If the problem persists, it may be a result of an application or other programming error and should be reported to technical support staff.
>
> Possible application errors that can cause this message include:
> - changing page data from SavePostChange PeopleCode, without making a corresponding change to the database.
> - changing the database via SqlExec at various points, for data that is also in the component buffers.
> - database auto-update fields maintained by triggers didn't get defined correctly in Record Field definition or in Record Properties definition.

Answer: Unfortunately, there is no recovery from this message. This usually happens when trying to save in the middle of making changes and then continuing to make changes. The system finds an inconsistency in the data and returns the error. The only option to click ok to the message, bring up the requisition again then continue with the changes. It is better to leave the transaction and search for it again to continue with subsequent changes.

Question #11: Is it mandatory to use WEB Punch-Out for Office Supplies?

Answer: WEB Punch-Out is the *preferred* method for purchasing office supplies. If an agency is using the Inventory module for their supplies, they should continue to use the State Catalog to purchase their items. Requesters using the State Catalog must remember to change the Supplier location to something *other than* PUNCHOUT. If this value is not updated, the order will not be submitted properly to the Supplier and may not be filled correctly.

Question #12: What fields should be populated by the Requester on Define Requisition page for WEB Punch-Out?

Answer: The following fields are "required" to be populated by the Requester for a WEB Punch-Out requisition. a. Buyer b. Distribution Defaults: Fund, SID, Program, PCBU, and Project (the *Account* code will be defaulted with the items). The PUNCHOUT - supplier location, Contract purchasing authority, Contract ID and EDX dispatch are all defaulted on the WEB Punch-Out requisition and should not be changed.

Question #13: The quantity field is grayed out on my requisition. Can I edit the quantity for an item on a WEB Punch-Out requisition once it is brought back to Core-CT?

Answer: Yes. To edit the quantity on a WEB Punch-Out requisition, click on the item description. The system will connect back to the supplier's site and the field will be editable. Update the amount, submit the cart and the revised quantity will be populated on the requisition.

Question #14: **What do I do if my PSA/PSO requisition is < \$50,000 and still must get OPM approval? The workflow doesn't appear to send the request to them.**

Answer: If needed, ad-hoc the appropriate OPM Approvers into the workflow by clicking on the + sign where they should be entered. Then Click on Apply Approval Changes. They will receive an email notification.