



Core-CT

eProcurement
Core-CT Staff Training Guide

October 2024

Welcome to the eProcurement Course!

Today, we will explore the enhancements introduced by the upgrade to PeopleSoft.

Guidelines for today's class:



Put cell phones on silent or vibrate



Save your questions for the end of each unit.



This course will provide an overview of system upgrades and changes

Welcome to the eProcurement Course!

We ask that during this course you:

- Put cell phones on silent or vibrate and Remain engaged.
- questions can be asked at the end of each unit

In this course we will be covering the new upgrades to PeopleSoft and how they will affect eProcurement processes.

Trainer - Facilitator – Participant Roles

Trainer

- Cover course content
- Speak to the functionality
- Answer any questions at the end of each section

Facilitator

- Share the presentation: [Training Material Location](#)
- Manage time
- Direct questions from participants to the Trainer at the end of each section
- Share the course evaluation survey: [eProcurement Course Survey](#)

Participants

- Ask questions in the chat throughout the training

NOTE:

- * *Unable to turn on camera*
- * *Unable to speak*

Here is a brief overview of the Roles throughout the training.

The Trainer will :

- Covering the course content
- Speaking to the functionality
- & answer any questions at the end of each section

The Facilitator will:

- Share the presentation
- Manage time

- Direct questions from participants to the Trainer at the end of each section

The Participants will:

- Ask questions in the chat throughout the training

NOTE:

**You will be unable to turn on camera*

**You will be unable to speak, so please make sure to ask your questions in the chat.*

Benefits of Fluid User Interface



Intuitive & Easy to Use

- ▶ **Responsive** and can adapt to various screen sizes



Easier Navigation

- ▶ **Fast and intuitive** navigation
- ▶ Perform tasks **easier** and **faster**



Caters to Various Users

- ▶ **Self-service** users
- ▶ **Agency** users
- ▶ Executive **decision-makers**

A few of the benefits of the new Fluid User interface are:

- It's intuitive and easy to use
- Easier navigation
- Caters to various users

Learning Objectives

At the end of this course, you will be able to:

- ▶ Create a new requisition
- ▶ Manage existing requisitions
- ▶ Requisition Approvals
- ▶ Create new receipts
- ▶ Manage existing receipts



The primary goal of this course is to provide an overview of creating new requisitions, managing current requisitions, approving requisitions, and generating new receipts, all within the new fluid UI (User Interface) for eProcurement.

Today's Agenda

Section
Course Overview and Objectives
Unit 1: Creating a New Requisition
Job Aids
Q&A
Unit 2: Manage Requisitions
Job Aids
Q&A
Unit 3: Approvals
Job Aids
Q&A
Unit 4: Receipts
Q&A

Unit 1: Creating a New Requisition



In this unit, we'll cover the process of creating a new requisition in the updated Fluid interface.

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In this unit we will explore the process of creating a new requisition in the updated Fluid UI

- Discuss navigation changes
- Compare revised pages
- Provide an overview of the process once requisitions are submitted

Creating Requisitions Key Points

The requisitioning process is broken down into three (3) steps:

01

Requisition Defaults

02

Add Items and Services

03

Review and Submit

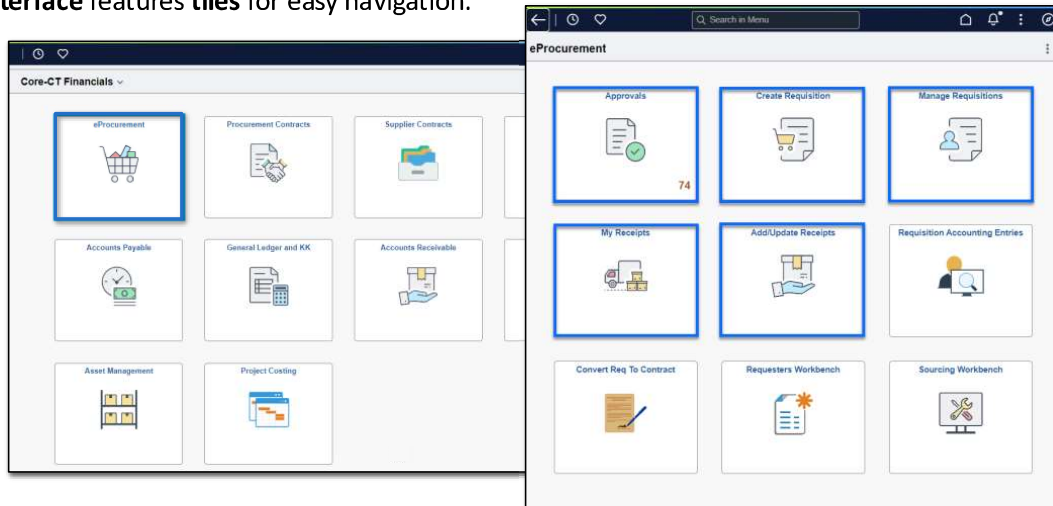
Create Requisitions Key Points

Three (3) step requisitioning process:

1. Define Requisition
2. Add Items and Services
3. Review and Submit

New Look

The **fluid interface** features **tiles** for easy navigation.



New Look

Here is a look at the brand new fluid interface. We have highlighted some of the new tiles you will be using for key eProcurement tasks including the eProcurement tile, approvals, create requisition tile, manage requisitions tile, my receipts tile, and add/update receipts tile

When to use an eProcurement Requisition

- ▶ When selecting items from the State Catalog.
- ▶ When buying office supplies via Punch-Out.
- ▶ When there is a need for a Special Request
- ▶ When submitting ITD10, DAS-BID, TSR, or PSA/POS Requisition Type.

When to use an eProcurement Requisition

- When selecting from the State Catalog
- When buying office supplies via Punch-Out
- When submitting Special requests
- When submitting ITD10, DAS-BID, TSR, or PSA/POS Requisition Types

Navigation to Create a New Requisition

- 01 Navigate to the **Employee Self Service** homepage.
- 02 Select **Core-CT Financials** from dropdown menu.
- 03 Click the **eProcurement** Tile.
- 04 Click the **Create Requisition** Tile.



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Now we will talk about how you can navigate to creating a new requisition:

To Create a New Requisition:

1. Navigate to **Employee Self Service**
2. Select **Core-CT Financials** from dropdown menu.
3. Click **eProcurement** Tile.
4. Click **Create Requisition** Tile.

Requisition Defaults

The Requisition Defaults page is where you fill in your preferences for **Header, Line, Shipping, and Distribution Defaults**.

Business Unit and Requester should default based on the User ID. If a user has access to multiple Business Units, the proper one must be selected.

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Requisition Defaults

The Requisition Defaults page is where you fill in your preferences for Header, Line, Shipping, and Distribution Defaults.

- At this point you can enter the Buyer, The Ship To, Due Date, and the Chartfield Coding which will be applied to each line of your requisition. If ordering from the Catalog, or doing a Punchout order, there is no need to enter the Vendor, Vendor Location, Category or Unit of Measure as they will default in with your line item. The Account Code will also populate in the Chartfields1 Section if ordering from the Catalog (or Punchout), and will override any different value you enter in the defaults.

- The Distribution Chartfields are now displayed in 3

separate tabs (Chartfields 1, 2 and 3).

- Use the Show All Columns icon to display all the fields in the Accounting Defaults on the same page.
- If the items are Inventory items, click on the Details tab to enter your IN-Business Unit.
- If the items are Assets, click on the Asset Information tab and enter your AM Business unit and your Profile ID.

Requisition Defaults

Please note: The **Default Options** box has been removed from the Requisition Defaults page. This functionality is now managed through **Mass Change**, which we will cover later in this course.

Requisition Settings

Business Unit: US001 US001 NEW YORK OPERATIONS Requisition Name: 0000000164

Requester: VP1 Kenneth Schumacher Requisition ID: 0000000164

*Currency: USD Priority: Medium

Card Number: [dropdown] Expiration Date: [dropdown]

Use Procurement Card

Default Options

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults

Supplier: [dropdown] Category: [dropdown]

Supplier Location: [dropdown] Unit of Measure: [dropdown]

Shipping Defaults

Buyer: [dropdown]

Ship To: US001 Attention: [dropdown]

Due Date: [dropdown]

Distribution Defaults

Accounting Tag: [dropdown]

Accounting Defaults

Chartfields1	Chartfields2	Chartfields3	Details	Asset Information	Personalize	Find	First	1 of 1	Last
Date	Percent	Location	GL Unit	Account	Alt Acct				
1	100.0000	US001	US005	500000					

Note that the Default options box previously found in between the Header and Line defaults has been removed. This is now managed through the Mass Change link, which will be covered later.

Requisition Types

The user must select the appropriate **Requisition Type**. Once a requisition is Saved, the requisition type cannot be changed. As an example, lets select **Requisition**.

Job Aids:

- [Types_of_Requisitions_DAS_BID.docx](#)
- [BITS-Funded_Assets_ITD-10_Requisition_Job-Aid.docx](#)
- [BITS-Funded_Assets_ITD-10_Requisition_Job-Aid.docx](#)
- [PSA_POS_Requisition.docx](#)
- [Types_of_Requisitions_Requisition.docx](#)
- [Types of Requisitions TSR EQUIP.docx](#)
- [Types_of_Requisitions_TSR_MACR.docx](#)

The screenshot shows the 'Requisition Defaults' form with the following fields and values:

- Header Defaults:** Business Unit: DASM1, Requisition Name: BIT DAS Laptops, Requester: 085741, DAS-Baczewski Michael, Priority: Medium, Currency: USD, Use Procurement Card: No, Card Number: [blank], Expiration Date: [blank].
- Line Defaults:** Supplier ID, Supplier Location, Buyer (all with search icons).
- Shipping Defaults:** Ship To: 064000058, Attention: [blank], Due Date: [calendar icon].
- Distribution Defaults:** SpeedChart: [search icon].
- Table:**

Chartfields1	Chartfields2	Chartfields3	Details	Asset Information	Show All
Distribution Line %	Percent %	Location %	GL Unit %	Account %	
1	100	ACORE	STATE		

It is important to select the correct Requisition type at this stage. Once a requisition is saved or submitted, the req type cannot be modified. On the left, you will find hyperlinks to the various job aids for the different requisition types.

Requisition Types

Requisition Types	Definition
ITD-10	Purchasing IT (Information Technology) Items or Services.
DAS-BID	Requisition used to initiate the start of a Bid for a procurement that is not on contract or replaces an expiring contract.
TSR-MACR	Telecommunications, Moves, Adds, Changes, and Repairs.
TSR-EQUIP	Telecommunications Equipment.
PSA See CGS (4-212 (2) and (3)) - Chapter 55a (Subject to change)	Personal Service Agreement, is a formal contract with a personal service contractor. This contractor, whether an individual, firm, or corporation, is engaged by an agency to provide services in exchange for a fee. The PSA outlines the specific services or end product that the contractor is obligated to deliver to the agency.
POS See CGS POS (4-70b (a)1) - Chapter 50 (Subject to change)	A Purchase of Service Contract is a formal agreement between a state agency and an organization for the acquisition of direct human services provided to clients.
Reqs.	Reqs. Covers most requisitions not mentioned in the above types.

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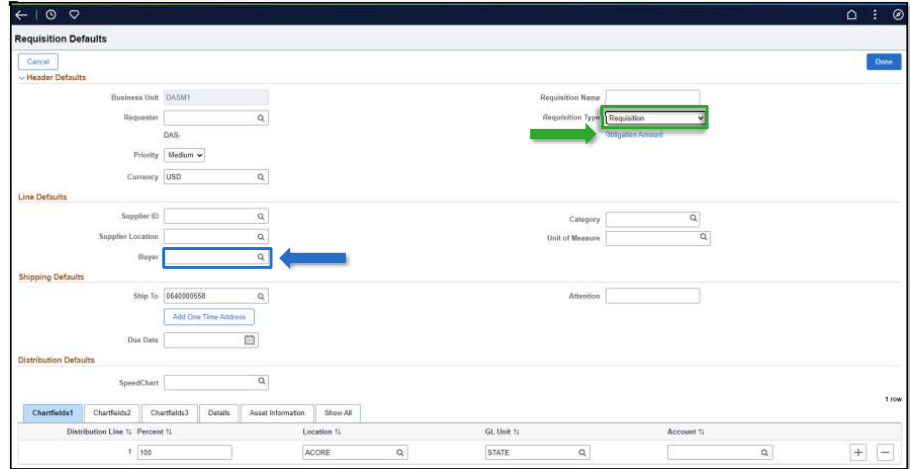
Here are the different types of requisitions:

- ITD-10 which is for purchasing IT items or services.
- DAS-BID are used to initiate the start of a bid that is not on contract or replaces an expiring contract.
- TSR-MACR are for Telecommunication, Moves, Adds, Changes, and Repairs.
- TSR-Equip are for telecommunications equipment.
- PSA are Personal Service Agreements.
- POS is a Purchase of Service Contract.
- Reqs covers most other requisitions.

Requisition Types

Depending on the **Requisition Type** selected, a hyperlink displays under the selection. The hyperlink opens to custom pages that also **require input**.

Each requisition should have one **Buyer**.



Defining_Requisition_Obligations.pdf.docx

Each Requisition type has a distinct hyperlink that appears below the dropdown menu, directing you to custom pages that also require input. On this example, the Req Type is Requisition, which prompts the Obligation Amount hyperlink; the link opens to a page where values are required for certain fields.

Reminder: each requisition should have one designated buyer. If the requester is NOT also the buyer, one needs to be entered on the req defaults.

At the bottom, there is a hyperlink to the 'Defining Requisition Obligations' job aid.

Distribution Defaults

Chartfields 1

- ▶ Percent
- ▶ Location
- ▶ GL Unit
- ▶ Account

Chartfields 2

- ▶ Fund
- ▶ Dept
- ▶ SID
- ▶ Program
- ▶ Bud Ref

Chartfields 3

- ▶ PC Business Unit
- ▶ Project
- ▶ Activity
- ▶ Source Type
- ▶ Category
- ▶ Subcategory

[Entering_Requisition_Defaults.docx](#)

Here, you will find Distribution Defaults and ChartFields 1, 2, and 3.

- **ChartField 1** includes the following fields: Percent, Location, GL Unit, and Account.
- **ChartField 2** contains: Fund, Department, SID, Program, and Budget Reference.
- **ChartField 3** features: PC Business Unit, Project, Activity, Source Type, Category, and Subcategory.

At the bottom, you'll find a hyperlink to the Entering Requisition Defaults' job aid.

Distribution Defaults (cont'd)

Details

- ▶ IN Unit
- ▶ Budget Date
- ▶ Stat

Asset Information

- ▶ AM Business Unit
- ▶ Profile ID
- ▶ Capitalize
- ▶ Cost Type
- ▶ Description

Entering_Requisition_Defaults.docx

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The **Details** tab includes fields for Inventory Unit, Budget Date, and Stat.

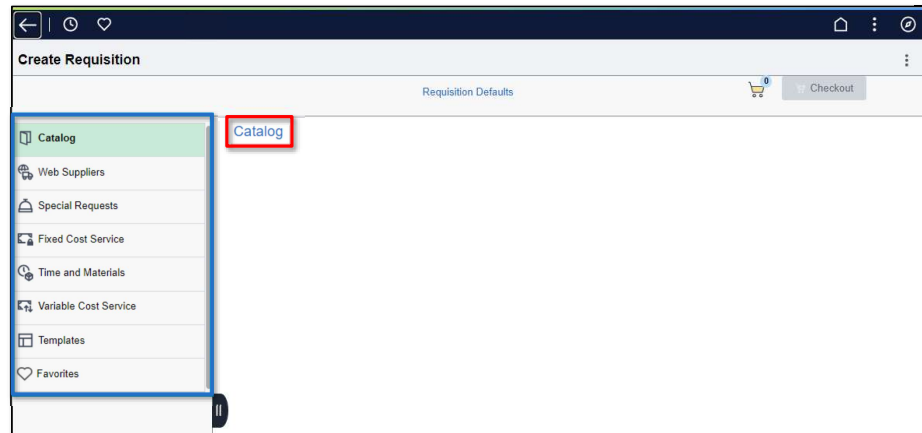
The **Asset Information** tab contains fields for Asset Management Business Unit, Profile ID, Capitalize, Cost Type, and Description.

At the bottom of the page, there is a hyperlink to the 'Entering Requisition Defaults' job aid.

Create Requisition

View the **Navigation Collection** on the left side of the **Create Requisition** Page. The following options are available:

- 01 Catalog
- 02 Web Suppliers
- 03 Special Requests
- 04 Fixed Cost Service
- 05 Time and Materials
- 06 Variable Cost Service
- 07 Templates
- 08 Favorites



View the **Navigation Collection** on the left side of the **Create Requisition** Page where you see the following options:

- Catalog
- Web Suppliers
- Special Requests
- Fixed Cost Service
- Time and Materials
- Variable Cost Service
- Templates
- Favorites

Catalog: Catalog Search

Use **Advanced Item Search** for precise catalog item results by providing detailed information.

Avoid using the Search Name function

Use the **Advanced Item Search** to search for catalog items. Enter as much information available to narrow the search results and find the exact items to order.

Please Note: Oracle has removed the "Search by Contract ID" Field, previously located at the bottom of the Search page.

When you click **Catalog**, you will be directed to the search page.

The more information provided, the more refined the search results will be.

Avoid using the **Search Name** field.

Please note that Oracle has removed the **Search by Contract ID** field.

To search by the CM #, or Item ID, enter the last set of digits between the % wildcard.

Ex: to get results for CM_2157_9014998, only enter %9014998%

Catalog: Catalog Search

Enter desired search criteria and click Search.

The 'Advanced Search' dialog box features a search bar at the top with a 'Search' button. Below it, the 'Advanced Item Search' section includes a dropdown menu set to 'All' and a text input field containing 'pads'. The search criteria are organized into several sections: 'Description' (Contains Any), 'Manufacturer' (Contains Any), 'Supplier' (Contains Any), 'Item ID' (Contains Any), 'UPN ID' (Equals), 'Category ID' (Contains Any), 'Supplier Item ID' (Contains Any), 'Manufacturer Item ID' (Contains Any), and 'Category' (Contains Any). Each section has a corresponding text input field.



The 'Create Requisition' page displays search results for 'pads'. The results are shown in a table with columns for Item ID, Description, Price, and Supplier. The search results are filtered to show items containing 'pads' in their descriptions.

Item ID	Description	Price	Supplier
CM_2157_3014998	#3050-17 SKY BLUE BURNISH PADS HI-PERFORMANCE 5/CASE 596265	\$24.69	C & C JANITORIAL SUPPLIES INC
CM_2157_3014999	#3050-18 SKY BLUE BURNISH PADS HI-PERFORMANCE 5/CASE 596272	\$31.54	C & C JANITORIAL SUPPLIES INC
CM_2157_3014997	#3050-19 SKY BLUE BURNISH PADS HI-PERFORMANCE 5/CASE 596259	\$29.28	C & C JANITORIAL SUPPLIES INC
CM_2157_3014996	#3050-20 INCH SKY BLUE BURNISH PADS HI-PERFORMANCE 5/CASE 596258	\$32.00	C & C JANITORIAL SUPPLIES INC
CM_2157_3015000	#3050-21 INCH SKY BLUE BURNISH PADS HI-PERFORMANCE 5/CASE 596266	\$36.19	C & C JANITORIAL SUPPLIES INC

This is the **Advanced Search** page, with 'pads' entered in the description field, displaying a search result of all catalog items containing 'pads' in their descriptions.

Catalog

Using the **catalog search results**, you have the option to add items to your cart or view its details.

Remember to only select **Single Supplier Requisitions.**

Click **Add to Cart** to add an item to the shopping cart.

Click the **Arrow** to show item details.

Adding Items to a Req using Search.docx

The left panel displays filters where a single supplier can be selected to show all results for that supplier

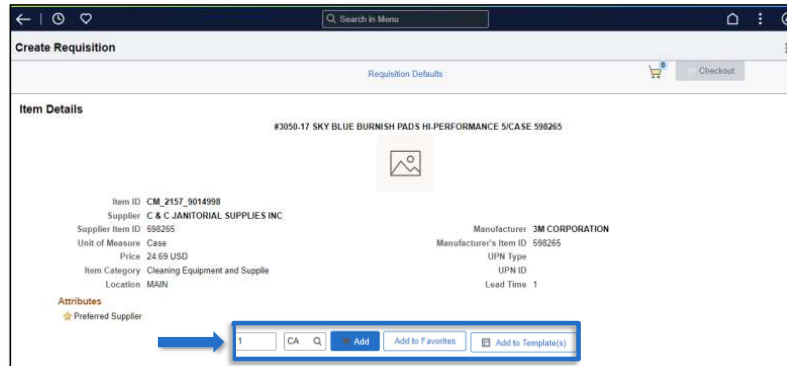
Click the arrow to view item details, and click **Add to Cart** to include items in the shopping cart.

Remember to follow the policy of one supplier, one buyer, and one Requisition per Purchase Order.

At the bottom is the hyperlink to the Adding Items to a Requisition using Search job aid.

Catalog: Item Details

The **Item Details** page provides information about the selected item and allows you to enter additional information such as the **quantity** of the item, **add** to your cart, **add to your favorites**, and **add to templates**.



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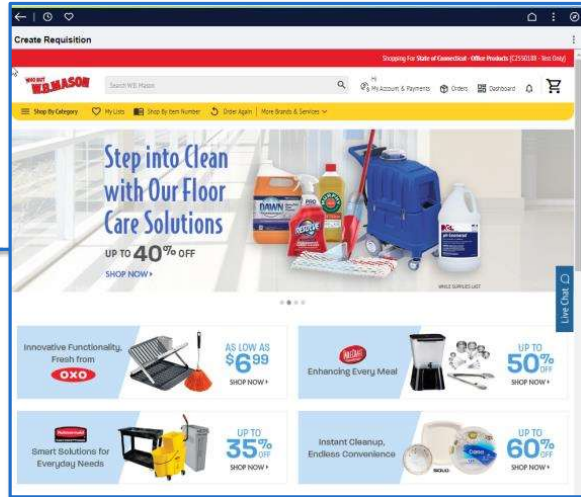
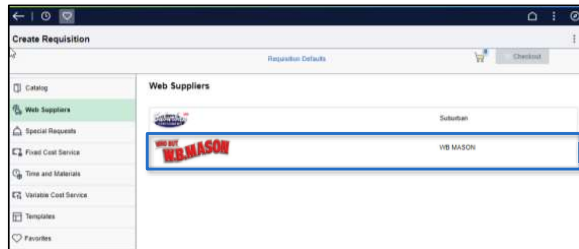
The **Item Details** page includes a long description of the item, which can help determine if it is the correct item to request. The **Item ID** represents the Catalog Management number.

For any questions about contract pricing in the catalog, contact a Contract Specialist at DAS Procurement.

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.

Web Suppliers

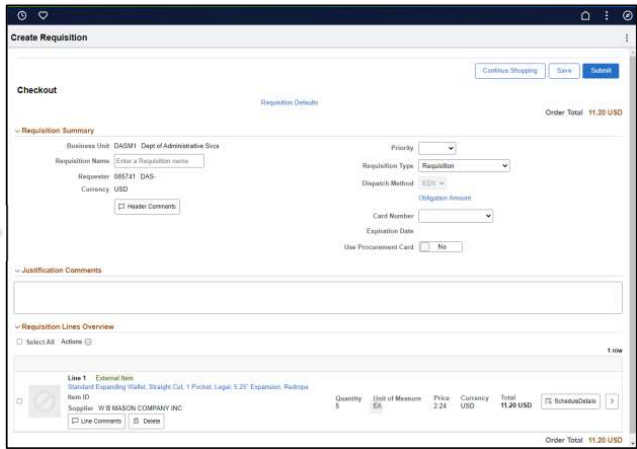
To purchase an item through a web supplier, navigate to the **Web Suppliers** tab and click on a punchout supplier. Then use the supplier's site to search for an item, choose your quantity, and add it to your cart.



To purchase an item from a web supplier, navigate to **Web Suppliers** and select a one of the punchout suppliers. You can then use the supplier's site to search for items and add them to your cart.

Web Suppliers (cont'd)

Clicking **Continue to Checkout** on the **Web Supplier's** site brings the user back to the **Fluid Checkout** page.



Clicking "Continue to Checkout" on the supplier's site redirects you back to the Fluid Checkout page.

Special Requests

To add items that are not in the Catalog, use the **Special Request** tab to describe/add goods to the requisition. Please note the required fields are marked with an asterisk.

The screenshot shows the 'Create Requisition' interface with the 'Special Requests' tab selected. The form is divided into several sections:

- Item Information:** Includes fields for Item Description, Price, Quantity, Category, and Due Date. Fields for Price, Quantity, and Category are marked with asterisks.
- Supplier Information:** Includes fields for Supplier ID, Supplier Location, and Supplier Item ID. The Supplier ID field is marked with an asterisk.
- Manufacturer Information:** Includes fields for Manufacturer ID and Manufacturer's Item ID.
- Comment:** Includes a text area for Comment Text and three checkboxes: 'Send Comment to Supplier', 'Show Comment on Receipt', and 'Show Comment on Voucher'.

Blue arrows in the image point to the following fields, which are marked as required (with asterisks): Item Description, Price, Quantity, Category, Currency Code, Unit of Measure, Supplier ID, and Supplier Location.

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Special Requests

- Navigate to the Special Request tab to add items not listed in the Catalog.
- Use the Special Request page to describe and include goods in the requisition.
- Some fields are mandatory (marked with asterisks), such as the Supplier ID, which is crucial for accurate processing.
- You can choose to share Additional Information with the supplier, which will be visible on the purchase order or receipt pages.

Fixed Cost Service

Use the **Fixed Cost Service** page to request a **onetime service for a flat fee**.

Example: A contractor is hired to repair electrical panel. The contractor will complete all necessary repairs for the price of \$1500.

The screenshot shows the 'Create Requisition' interface for a 'Fixed Cost Service'. The left sidebar contains navigation options: Catalog, Web Suppliers, Special Requests, Fixed Cost Service (highlighted), Time and Materials, Variable Cost Service, Templates, and Favorites. The main content area is titled 'Fixed Cost Service' and includes the following fields:

- Service Information:**
 - *Service Description: Repair Electrical Panel
 - *Price: 1500.00
 - *Currency Code: USD
 - *Category: 00000000
 - Start Date: 08/21/2024
 - End Date: 08/21/2024
- Supplier Information:**
 - Supplier ID: [Search]
 - Supplier Location: [Search]
 - Quote Number: [Search]
 - Quote Date: [Search]
- Comment:**
 - Comment Text: [Text Area]
 - Send Comment to Supplier
 - Show Comment on Receipt
 - Show Comment on Voucher

An 'Add to cart' button is located at the bottom left of the form.

Fixed Cost Service

- Use the Fixed Cost Service page to request a one-time service for a flat fee.
- Example:** A contractor is hired to repair an electrical panel, completing all necessary repairs for a total price of \$1,500.

Time and Materials

Request a service for which **the fee is based on the time worked** and there is a cost for materials.

Example: A plumber is hired to repair a broken water heater at an agency. The plumber will complete the repair at the rate of \$50 per hour. The job is expected to take 4 hours. A new part is needed to make the repair at a cost of \$75.

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Time and Materials

- Use the Time & Materials link to request a service where the fee is based on the time worked and includes costs for materials.
- **Example:** A plumber is hired to repair a broken water heater at an agency. The plumber charges \$50 per hour, with the job expected to take 4 hours. Additionally, a new part costing \$75 is required for the repair.

Variable Cost Service

Variable Cost Service tab is where the amount of time to make the repair or service is unknown and there are no materials required

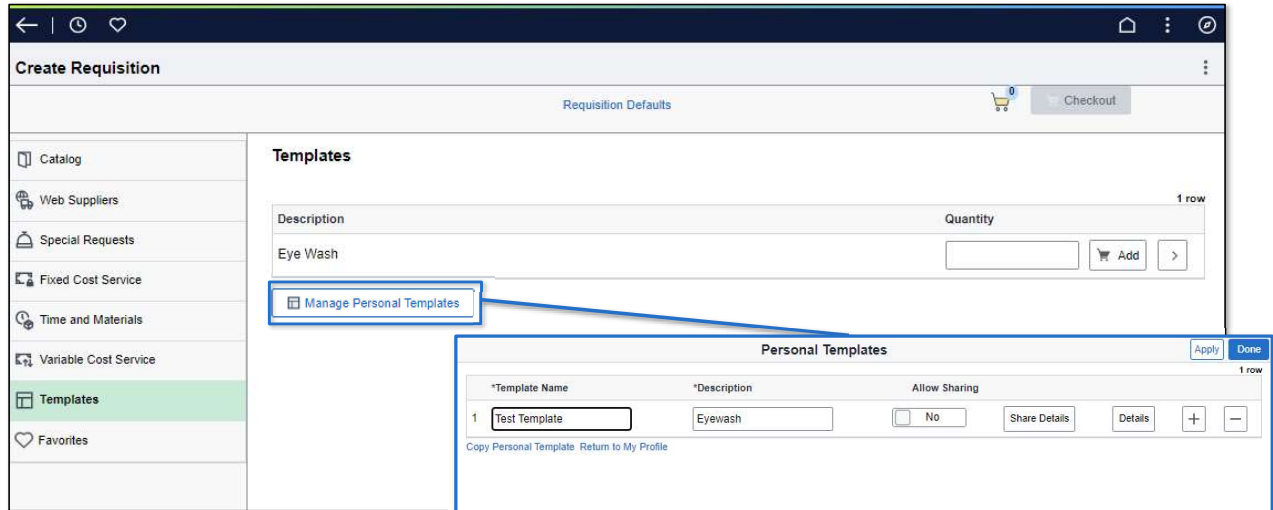
*Example:
Troubleshooting
computer issues @ a
cost of \$125/hr. not
knowing how many
hours it may take.*

Variable Cost Service

- Variable Cost Service applies when the time required to complete the repair or service is unknown.
- No materials are needed, and the total cost is unknown.
- Example:** Troubleshooting computer issues at a rate of \$125 per hour.

Templates

Add a template to a requisition by selecting it and clicking "Add" on the **Templates** tab.



Add,Delete,Share Templates (Create Requisition).docx

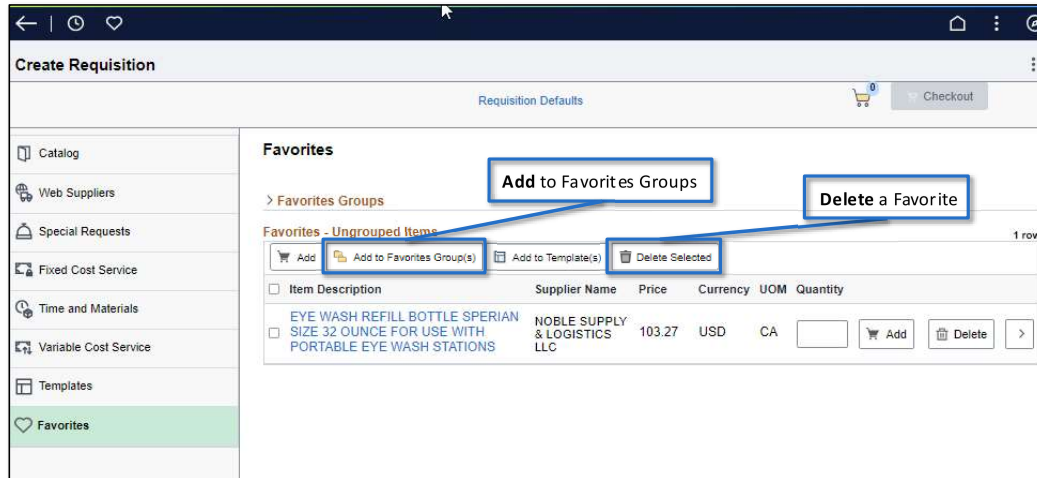
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Templates

- Use the "Add to Template(s)" button to save requisition lines for future use.
- Select the line(s), click "Add to Template," and choose an existing template or create a new one.
- Access templates from the Templates tab on the Create Requisition page.
- To add a template to a requisition, select it and click "Add" on the Template Tab.
- Pricing will update automatically with new Catalog requisitions.
- Inactive items will not be available for checkout.
- To delete templates, click "Manage Personal Templates," select the template, click the minus sign "-", confirm the deletion, and then click "Done."
- A hyperlink to the Add/Delete/Share Templates job aid is available at the bottom of this slide.

Favorites

Add frequently purchased items to the **Favorites** tab to simplify future requisitions.



Adding Favorites to Favorite Groups (CreateRequisition).docx

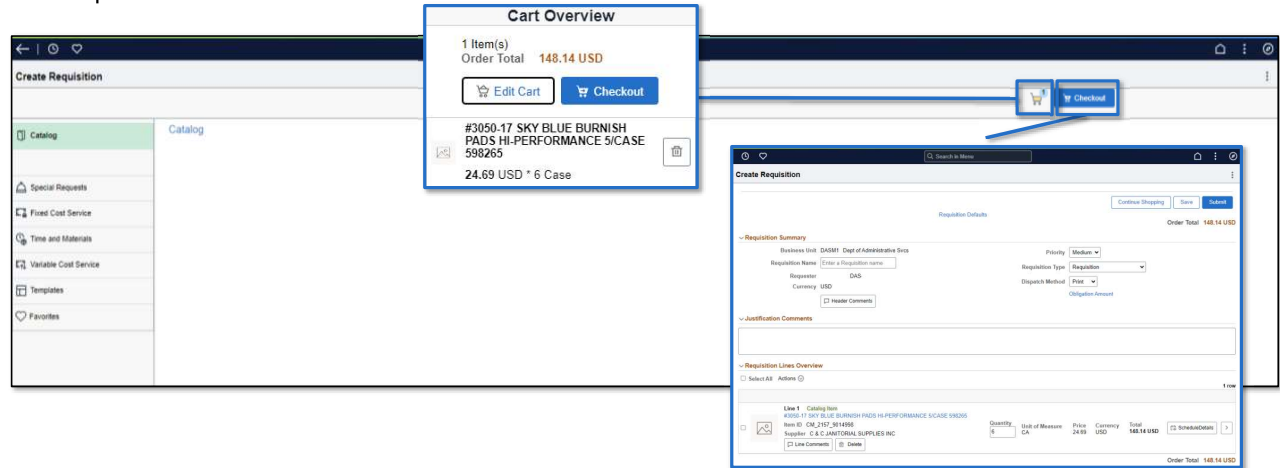
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Favorites

- Add frequently purchased items to Favorites for easier future requisitions.
- To add an item to Favorites, click "Add to Favorites" and confirm by clicking the "Done" button.
- To delete a Favorite:** Go to the Favorites Tab, click "Delete," and confirm the deletion.
- To add a Favorite item to a requisition, edit the quantity and click "Add."
- Group Favorite items by selecting checkboxes, clicking "Add to Favorites Group(s)," and providing a name and description for the group.
- An exclamation icon indicates inactive items, with a hover-over message for more details.
- Pricing on Favorites automatically updates with each new Catalog pricing.
- A hyperlink to the Adding Favorites to Groups job aid is available at the bottom.

Shopping Cart

Click the **Shopping Cart** icon for the **Cart Overview**. The Cart stays active, updating as you add items. Always click the shopping cart icon before adding items to a new req to ensure there are no unneeded items left from a previous session.



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Shopping Cart

- Click "Shopping Cart" for an overview of your cart.
- The cart remains active, updating as you add items.
- Take advantage of the Persistent Cart Functionality to save your progress in between sessions and return later to complete/save your order.
- Even if the cart icon shows a zero, always click it to check for any unneeded items left from a previous session or requisition (this is a known Oracle bug).
- Select the Checkout button to bring up the Requisition details

Checkout

Select the **Checkout** button to bring up your **Requisition Summary**, **Justification Comments** field, and **Requisition Lines Overview**.

The screenshot shows the 'Create Requisition' interface. At the top right, there are buttons for 'Continue Shopping', 'Save', and 'Submit'. Below these is the 'Requisition Defaults' section with an 'Order Total' of 148.14 USD. The main form is divided into three sections: 'Requisition Summary', 'Justification Comments', and 'Requisition Lines Overview'. The 'Requisition Summary' section includes fields for Business Unit (DASM1 Dept of Administrative Svcs), Requisition Name, Requester (DAS), Currency (USD), Priority (Medium), Requisition Type (Requisition), and Dispatch Method (Print). The 'Justification Comments' section is a large text area. The 'Requisition Lines Overview' section shows a table with one line item. The table has columns for Line, Catalog Item, Quantity, Unit of Measure, Price, Currency, and Total. The line item is: Line 1, Catalog Item #3950-17 SKY BLUE BURNISH PADS HI-PERFORMANCE 5/CASE 598265, Item ID CM_2157_5014998, Supplier C & C JANITORIAL SUPPLIES INC, Quantity 6, Unit of Measure CA, Price 24.69, Currency USD, Total 148.14 USD. There are buttons for 'Line Comments' and 'Delete' for each line item. A 'ScheduleDetails' button and a right-pointing arrow are also visible at the bottom right of the table.

Clicking the **Schedule Details** button brings you to the **Schedule Details** page.

Clicking the **>** brings you to the **Line Details** page.

Review

- Select the “Checkout” button to access your “Requisition Summary,” “Justification Comments” field, and “Requisition Lines Overview.”
- The lines added to the requisition will display in the “Requisition Lines Overview” box.
- Clicking the arrow will expand each line for review and editing.
- Clicking the Schedule Details button brings you to the Schedule Details Page, including Distributions.

Line Details

Purchasing Authority defaults to Contracts

The Contract ID will default on Catalog items and Punchout requisitions but must be entered for Special Requests that have a purchasing authority of Contracts.

The requisition cannot be saved without a Contract ID if the purchasing authority is Contracts.

The screenshot shows the 'Requisition Line Details' form. The 'Line Details' tab is active. The 'Contract ID' field in the 'Contract Information' section is highlighted with a blue box. The 'Purchasing Authority' dropdown at the bottom is also highlighted with a blue box and set to 'Contracts'. The form includes sections for Item Summary, Attributes, Item Additional Information, Supplier Information, and Manufacturer Information.



Line Details

- Click the **Line Details** tab to access the Line Details page.
- All information on this page defaults automatically.
- The Purchasing Authority defaults to Contracts.
- The Contract ID will automatically populate for Catalog and Punchout orders, but it must be entered for other Reqs with a Purchasing Authority of Contract.

Schedule Details

- ▶ Used to manage and track the delivery schedules of requisition line items.
- ▶ Specify important details such as **delivery dates, quantities, and locations** for ordered goods or services.
- ▶ The page also provides access to Distributions ChartFields.

The screenshot displays the 'Requisition Line Details' interface. At the top, it shows the 'Order Total' as 148.14 USD. The main section is titled '#3050-17 SKY BLUE BUSINESS PADS PERFORMANCE SCISSOR'. Key details include:

- Item ID: CM_117_301498
- Item Category: Cleaning Equipment and Supplies
- Supplier: C & C SANITORY SUPPLIES INC.
- Manufacturer: 3M CORPORATION
- Price: 24.99 USD
- Quantity: 6 Case

 The 'Schedule 1' section contains:

- *Ship To: 044000558
- Attention To: DAB
- Due Date: [empty]
- Address: 452 Columbia Blvd Hartford, CT 06102

 The 'Distributions' section includes a table with the following data:

Distribution Line %	Status %	Dist Type %	Location %	Quantity %	Open Qty %	Percent %	Merchandise Amount %	GL Business Unit %
1	Open		ACORE	6	6	100	148.14 (STATE)	

Schedule Details

- Select the **Schedule Details** tab to access detailed schedule information.
- This section provides a comprehensive item summary used to manage and track the delivery schedules of requisition line items.
- Specify important details such as delivery dates, quantities, and locations for the ordered goods or services.
- The Schedule Details tab also offers access to the Distributions ChartFields.

Split Funding

To split the funding for this line, click the + sign to add another distribution row under the distributions drop down.

The screenshot displays the 'Requisition Line Details' window for Line 1. The 'Distributions' section is expanded, showing a table with columns for Distribution Line #, Status, DAK Type, Location, Quantity, Open Qty, Percent, and Merchandise Amount. Two rows are visible, both with a '+' sign in the Percent column, indicating they can be edited or added to.

Distribution Line #	Status	DAK Type	Location	Quantity	Open Qty	Percent	Merchandise Amount %	GL Business Unit %
1	Open		ACORE	3	3	33	74.97	STATE
2	Open		ACORE	3	3	33	74.97	STATE

ePro Split Funding.docx

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Split Funding

- Click the arrow to expand the line for editing.
- Navigate to the **Schedule Details** tab.
- Click the **Distributions** dropdown to expand and display the Accounting Lines.
- To split the funding for the line, click the + sign to add another distribution row.
- Enter the additional ChartField information, ensuring to adjust the percent field to reflect the correct value for each line.
- A hyperlink to the ePro Split Funding job aid is available at the bottom.

Mass Change

- ▶ The **Default Options** box has been removed from the **Requisition Defaults** page. This functionality is now handled through **Mass Change**.
- ▶ **Load Values From Defaults** fills in fields with information from the Requisition Defaults.
- ▶ The changes made to the fields on the **Mass Change** page will override the **Requisition Defaults**.

Cancel **Mass Change** Done

▼ **Line Information**

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID Buyer

Supplier Location Category

▼ **Shipping Information**

Ship To: 0640000558 Due Date:

Attention:

Comments:

Ship Via: COMMON Freight Terms: FOB DEST

▼ **Distribution Information**

*Apply Distribution Changes: All Distribution Lines ▼

Please enter GL Business Unit before selecting other chartfield values

1 row

Chartfields1 Chartfields2 Chartfields3 Details Asset Information Show All

Distribution Line T1	Percent T1	Location T1	GL Unit T1	Account T1
1	<input type="text"/>	ACORE <input type="text"/>	STATE <input type="text"/>	<input type="text"/>

Using the Mass Change Link.docx

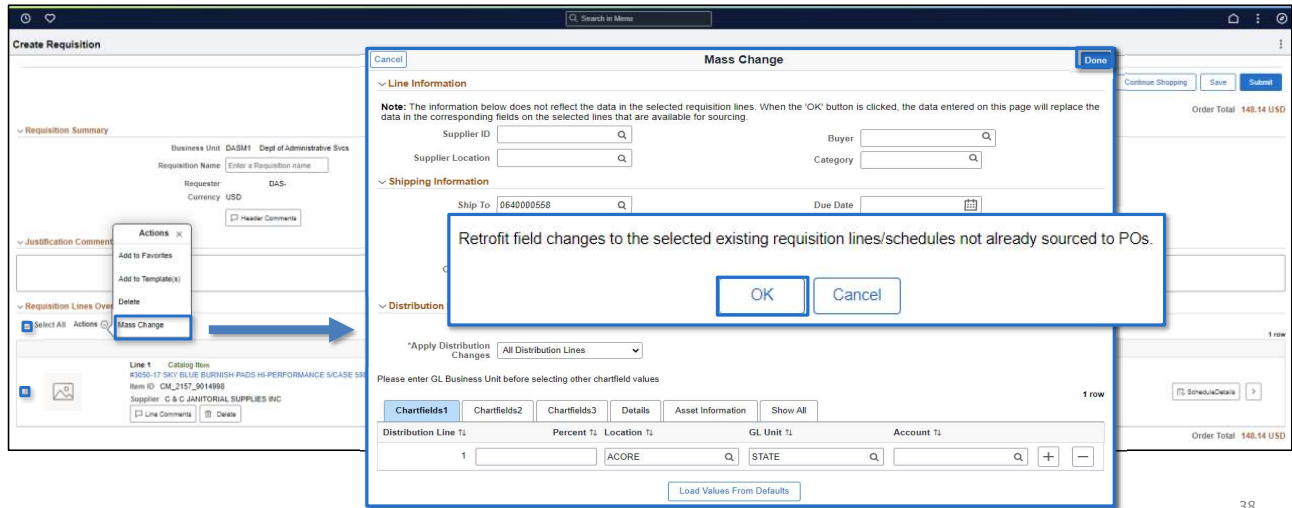
37

Mass Change

- The **Default Options** box has been removed from the **Requisition Defaults** page. This functionality is now handled through **Mass Change**.
- The **Load Values From Defaults** option populates fields with information from the Requisition Defaults.
- Changes made to fields on the Mass Change page will override the Requisition Defaults.
- A hyperlink to the **Using the Mass Change Link** job aid is available at the bottom.

Mass Change

To edit **multiple lines on a requisition**, select the desired lines by checking the boxes in front of the lines or the **Select All** check box and click **Mass Change** from the **Actions** drop down menu.



Mass Change

- To edit multiple lines on a requisition, select the desired lines by checking the boxes in front of each line or use the **Select All** checkbox.
- Click the **Actions** dropdown and select **Mass Change**.
- On the **Mass Change** page, click the **Load Values From Defaults** link to view the current chartfields from the Req 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/schedules not already sourced to POs.” Click **OK**.

Line Comments and Attachments

Click the **Line Comments** icon to add comments for a particular *line*. The line comments can be directed to the Supplier and display on the purchase order; display on the Receiving pages; or display on the Voucher pages. Select the appropriate checkbox(es).

The screenshot shows the 'Create Requisition' interface with a modal dialog box titled 'Requisition Line Comments and Attachments'. The dialog box contains the following elements:

- Cancel** and **Done** buttons at the top.
- Comments** section with a **Use Standard Comments** button and a **Comment Text** input field containing 'L200 - eProcurement ILT'.
- Three checkboxes for display locations:
 - Send to Supplier** (set to **No**)
 - Show at Receipt** (set to **No**)
 - Show at Voucher** (set to **No**)
- Add Attachment** button at the bottom.

The background interface shows the 'Requisition Summary' with fields for Business Unit (DASM1), Requisition Name, Requester (DAS), and Currency (USD). The 'Requisition Lines Overview' section shows a table with one line item:

Line	Quantity	Unit of Measure	Price	Currency	Total
Line 1	6	CA	24.69	USD	148.14 USD

The 'Order Total' is 148.14 USD.

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Line Comments

- Click the **Line Comments** icon to open the Line Comments and Attachments for a specific line.
- Line comments can be directed to the Supplier and will display on the purchase order, receiving pages, or

voucher pages accordingly. Select the appropriate checkbox(es)

Line Comments and Attachments

In **Line Comments and Attachments**, the user can **Add Attachments** to the Requisition.

Comments_and_Attachments.docx

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In the Line Comments and Attachments page, users can also add attachments that allow requesters to communicate supplemental information and requirements to suppliers, approvers, and other Core-CT users, and are always tied to the requisition.

Use the **Add Attachments** button to include supporting documentation with the requisition.

1. Click the **Add Attachment** button.
 2. Click the **My Device** button.
 3. Select the file you wish to attach.
 4. Click **Open**.
 5. Click **Upload**.
 6. Once the file is uploaded, Click **Done**.
 7. Click **Done** again once all attachments are added.
- Attachments are permanently associated with requisitions, and once sourced, they carry over to the purchase order. Attachments will be sent to the supplier when the **Send to Supplier** box is checked and the PO is dispatched via email.
 - At the bottom, there is a hyperlink to the **Comments and Attachments** job aid.

Save and Submit

The **Submit** button saves the requisition and initiates workflow. The Confirmation page will display. The **Save** button will save the requisition without initiating workflow. The system will assign a Requisition ID but will not display the Confirmation page.

The screenshot shows the 'Create Requisition' interface. At the top right, there are three buttons: 'Continue Shopping', 'Save', and 'Submit'. A blue arrow points to the 'Submit' button. Below the buttons, the 'Order Total' is displayed as 148.14 USD. The 'Requisition Summary' section includes fields for Business Unit (DASM1 Dept of Administrative Svcs), Requisition Name (with a placeholder 'Enter a Requisition name'), Requester (DAS), Currency (USD), Priority (Medium), Requisition Type (Requisition), and Dispatch Method (Print). There is also a 'Header Comments' checkbox. The 'Justification Comments' section is a large text area. The 'Requisition Lines Overview' section shows a table with one line item:

Line 1	Catalog Item	Quantity	Unit of Measure	Price	Currency	Total
1	#3050 17 SKY BLUE BURNISH PADS HI-PERFORMANCE SCASE 590265 Item ID: CM_2157_5014599 Supplier: C & C JANITORIAL SUPPLIES INC	6	CA	24.69	USD	148.14 USD

At the bottom right of the table, there is a 'Schedule Details' button. The 'Order Total' is also displayed as 148.14 USD at the bottom right of the form.

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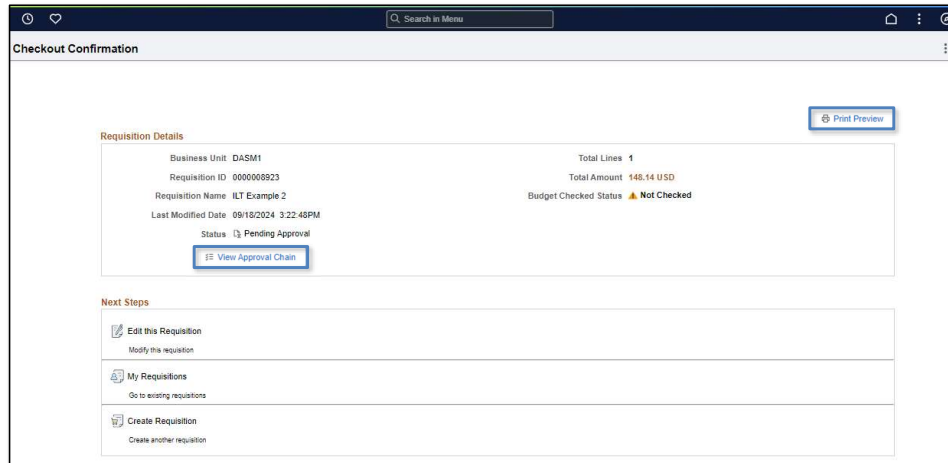
Save and Submit

- The **Submit** button saves the requisition and initiates the workflow. A Confirmation page will display, and the requisition will be routed to the Req Amount Approver 1's approvals list.

- The **Save** button saves the requisition without initiating the workflow. The system will assign a Requisition ID, but the Confirmation page will not be generated/displayed.

Confirmation Page

The **Confirmation Page** displays after clicking the **submit** button. From this page you can **View Approval Chain** and view a **Print Preview**.



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Confirmation Page

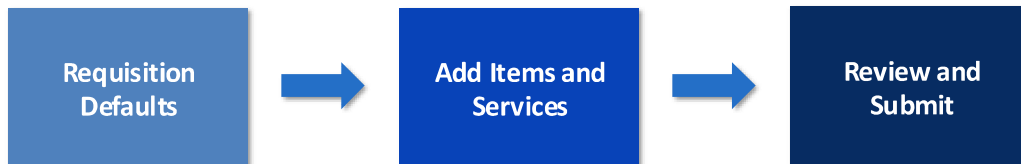
- The Confirmation page appears after clicking the **Submit** button.
- It displays summary requisition information, including the Requisition ID generated upon saving the requisition.
- Click the **View Approval Chain**

button to see the approval status path with the approvers in the workflow.

- Click the **Print Preview** button to view a printable version of the requisition (Note: The State of CT is intended to be paperless, so printing may not be necessary). A pop-up window will appear asking, “Do you want to print the requisition with distribution details?” Click **Yes** or **No** to proceed to the printable view.
- You can edit the requisition by clicking the **Edit Requisition** button.
- To return to the My Requisitions page, click **My Requisitions**.

Creating Requisitions: Key Points

Three (3) step requisitioning process:



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Create Requisitions Key Points

Three (3) step requisitioning process:

1. Define Requisition
2. Add Items and Services
3. Review and Submit

Creating Requisitions: Key Points

Comments can be **routed to the vendor with the PO, display on the receipt, or display on the voucher.**

Attachments can be included and sent to the supplier with purchase orders dispatched through **email.**

You can **Split Funding** and assign **Distribution.**

The **Confirmation page** provides **summarized information** and lets you know the requisition has been submitted successfully.

You can save **requisition lines as Favorites** and/or **Templates** to create new requisitions. **Templates** can be shared.

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Key Points Continued

- Comments can be routed to the vendor with the purchase order, displayed on the receipt, or shown on the voucher.
- Attachments can be included and sent to the supplier with purchase orders dispatch through email.
- The Confirmation page provides summarized information and confirms that the requisition has been saved successfully.
- You can save requisition lines as favorites and/or templates.
- Funding can be split, and distributions can be assigned accordingly.

Updated Job Aids

Job Aid Name	Job Aid Links
Requisition Type: Requisition	Types_of_Requisitions_Requisition.docx
Requisition Type: TSR Equipment	Types of Requisitions TSR EQUIP.docx
Requisition Type: DAS Bid	Types_of_Requisitions_DAS_BID.docx
Requisition Type: ITD-10	Types_of_Requisitions_ITD-101_Agency_Funded_IT_Purch.docx
Requisition Type: TSR MACR	Types_of_Requisitions_TSR_MACR.docx
Requisition Type: PSA/POS	PSA_POS_Requisition.docx
Entering Requisition Defaults	Entering_Requisition_Defaults.docx
Creating a TSR Requisition	Creating_TSR_Requisition_Job_Aid.docx

Here are all the job-aids associated with Creating a new requisition.

Updated Job Aids

Job Aid Name	Job Aid Links
Creating a Multiple Distribution Requisition	creating_multiple_distributions_req.docx
BITS-Funded Assets ITD-10 Requisition	BITS-Funded_Assets_ITD-10_Requisition_Job-Aid.docx
Adding Favorites to Favorite Groups (Create Requisition)	Adding Favorites to Favorite Groups (CreateRequisition).docx
Add/Delete/Share Templates (Create Requisition)	Add,Delete,Share Templates (Create Requisition).docx
Adding Items to a Requisition Using Search	Adding Items to a Req using Search.docx
Comments and Attachments	Comments_and_Attachments.docx
Defining Requisition Obligations	Defining_Requisition_Obligations.pdf.docx
ePro Split Funding	ePro Split Funding.docx
Using the Mass Change Link	Using the Mass Change Link.docx

What Questions Are There?



- ▶ Post questions within the chat

Are there any questions about what was discussed in **Unit 1: Creating Requisitions**? If you have any specific topics or points you'd like to revisit, feel free to ask!

Unit 2: Manage Requisitions



In this unit, we'll explore how to manage existing requisitions, perform key tasks using the Fluid interface, and cover navigation changes.

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Manage Requisitions

In this unit, we will explore how to manage existing requisitions, perform key tasks using the fluid interface, and discuss navigation changes.

- **Managing Existing Requisitions:** Learn how to find, edit, and update requisitions as needed.
- **Key Tasks:** Familiarize yourself with essential actions in Manage Requisitions
- **Fluid Interface:** Understand how to navigate the updated interface for a more streamlined experience.

Navigation to Manage Requisitions

- 01 Navigate to the **Employee Self Service** homepage.
- 02 Select **Core-CT Financials** from dropdown menu.
- 03 Click the **eProcurement** Tile.
- 04 Click the **Manage Requisitions** Tile.



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To access My requisitions using the fluid interface:

1. Go to **Employee Self Service**.
2. Select **Core-CT Financials** from the dropdown menu.
3. Click on the **eProcurement Tile**.
4. Click the **Manage Requisitions Tile**.

My Requisitions

The Manage Requisitions tile will default to **the My Requisitions** page, which contains the requisitions created by the user, for their default Business Unit, within the last seven days. Filters can be adjusted accordingly to expand or narrow your search results.

The screenshot shows the 'My Requisitions' page with a 'Filters' dialog box open. The dialog box contains the following fields:

- Business Unit: DASM1
- Requisition Name: [Search]
- Requisition Type: [Dropdown]
- Requisition ID: [Search]
- PO Number: [Search]
- From Date: 09/11/2024
- To Date: 09/18/2024
- Requester: [Search]
- Entered by: [Search]
- Request State: All but Complete
- Budget Status: [Dropdown]
- Item ID: [Search]
- Item Description: [Search]
- Ship To Location: [Search]
- Supplier Item ID: [Search]
- Clear button

The main interface shows a table of requisitions with columns for Action, Requisition Name, Business Unit/Requisition ID, Date, Status, Budget, and Amount.

Action	Requisition Name	Business Unit/Requisition ID	Date	Status	Budget	Amount
	ILT Example	DASM1/0000008920				
	0000008918	DASM1/0000008918				
	0000008917	DASM1/0000008917				
	0000008916	DASM1/0000008916				
	Test 0723_1	DASM1/0000008913				
	Test 0723	DASM1/0000008912				
	0719_2	DASM1/0000008911				
	0719 test	DASM1/0000008910				
	TEST HOLD BUTTON	DASM1/0000008909				
	Test 0717	DASM1/0000008907	07/17/2024	DAS-	Pending	Not Chkd 12,306.10 USD
	TEST PUSHBACK3	DASM1/0000008896	05/30/2024	DAS-	Pending	Not Chkd 12,306.10 USD
	TEST PUSHBACK2	DASM1/0000008895	05/30/2024	DAS-	Pending	Not Chkd 12,306.10 USD
	TEST PUSHBACK	DASM1/0000008894	05/30/2024	DAS-	Open	Not Chkd 12,306.10 USD

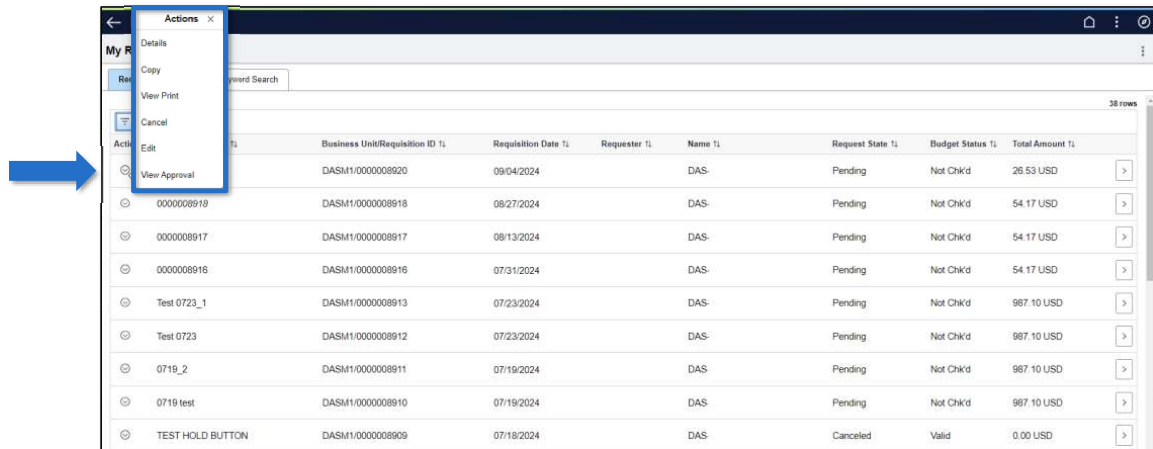
50

My Requisitions

- The Manage Requisitions tile will default to **the My Requisitions** page, which contains the requisitions created by the user, for their default Business Unit, within the last seven days.
- Click “Filters” button to edit the search criteria. The defaults are Business Unit and Requester. The Date From and Date To default to the previous week.
- The Requests Status defaults to All but Complete.
- Use any of the other filters to expand or narrow your search results.
- you also have the ability to search by Budget Status to bring up Reqs in budget error

Actions

Click the **Actions drop down** list to select an action for the requisition you are working on. Use the **Manage Requisitions** page once a requisition has been saved to **edit**, **cancel**, and **copy** requisitions. You can also view the Request Lifecycle, **Approvals**, and a **Printable Version**.



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Actions

- Click the “Action” drop down list on the left to see the available options for a particular requisition depending on the roles that are assigned to your user ID by Security.
- The Actions that display are Details, Copy, View Print, Cancel, Edit, and View Approvals.

Details

The **Details** page displays a **Requisition Summary**, **Requisition Lifeline**, and the **Line** items of the Requisition.

The screenshot shows the 'Line Details' interface. At the top, there is a 'Cancel Requisition' button. Below it, the 'Requisition Summary' section displays the following information:

- Requisition Name: ILT Example
- Business Unit: DASM1
- Requisition ID: 0000008920
- Requisition Date: 09/04/2024
- Request State: Pending
- Requester: DAS
- Entered By: DAS
- Budget Check Status: **Not Checked**
- Total Amount: 26.53 USD

The 'Requisition Lifeline' section is a horizontal process flow diagram with icons for: Requisition, Approvals, Inventory, Purchase Orders, Change Request, Receiving, Delivery, Returns, Invoice, and Payment.

The 'Lines' section contains a table with the following data:

Item Image	Description	Item ID	Ship To	Line State	Quantity	UOM	Price	Total Amount
	Line 1 - ACCORDION EXPANDING FILE POCKET - LEGAL - 8.50 INCH X 14 INC	CM_2157_4412100	0640000558	Pending Approval	1	Box	26.53	26.53 USD

At the bottom right of the table, there is a 'Cancel Line' button and a right-pointing arrow.

The **Details** page provides a **Requisition Summary**, a visual **Requisition Lifeline**, and a list of the **Line Items** included in the requisition.

Copy

The **Copy** action allows users to quickly duplicate an existing requisition. Updates can be done on the **Checkout** page. Users can not copy **Punch Out** requisitions.

The screenshot displays the 'Create Requisition' interface. At the top, there are navigation icons and a search bar. Below the title, there are three buttons: 'Continue Shopping', 'Update Cart', and 'Checkout'. The 'Edit Shopping Cart' section shows '1 Item(s) to buy now.' and a 'Requisition Summary' section with the following details:

- Business Unit: DASM1
- Requisition Name: ILT Example 3
- Requester: DAS-
- Currency: USD

A table below lists the requisition items:

Item Description	Status	Price	Currency	Quantity	Unit of Measure	
#3050-17 SKY BLUE BURNISH PADS HI-PERFORMANCE 5/CASE 598265	Open	24.69	USD	6	CA	Delete

The total amount is 148.14 USD.

Copying an Existing Requisition.docx

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Copy Feature

This feature is especially helpful for creating new requisitions based on previous orders, saving time by replicating all line items, quantities, and other relevant details from the original requisition. Users can then modify any copied information as needed via the checkout page.

The req type defaults to Requisition on the new req, and the user must change it if necessary.

Please note that Punch-Out requisitions cannot be copied.

At the bottom, there is a hyperlink to the **Copy an Existing Requisition** job aid.

View Print

The **View Print** action will display a printable version of the requisition.

The User will be asked if they want it with or without the distribution details displayed.

Do you want to print the requisition with distribution details ?

Business Unit: DASMT Requisition: 000008923 Requisition Name: ILT Example 2		Requester: Requested By: DAS Entered Date: 9/18/24		Status: Pending Currency: USD Requisition Total: 148.14			
Obligation Amount: 148.14 End Date: 2025-05-30			Start Date for Gen Standing PO 2024-09-18 Custom Field 1: PRN				
Line: 1	Item Description: #5025-17 SKY BLUE BURNISH PADS H-PERFORMANCE SCASE 598285	Quantity: 6	UOM: CA	Price: 24.69	Line Total: 148.14 Cwref_ID: 21P3X0163AA Line Status: Pending CM Num: CM_2107_2014998 PO_Auth: CONT		
Line Comments:							
Ship Line: 1 Attention: DAS Ship Via: COMMON		Ship To: 0540000558 Due Date: Freight Terms: FOB DEST		Address: 450 Columbus Blvd Hartford CT 06103 United States Shipping Quantity: 6 Shipping Total: 148.14			
Dist	Status	Location	Qty	Percent	Amount	GL Unit	Account
1	Open	ACORE	3	50.00	74.07	STATE	53390
Dept		Fund		Program		SID	
DAS2920		11000		14000		10020	
Open QTY		PC BU		Project		Open Amt	
3		NONPC		DAS_NONPROJECT		74.07	
GL Base Amount		Currency		Sequence		Capitalize	
74.07		USD		0		N	
Dist	Status	Location	Qty	Percent	Amount	GL Unit	Account
2	Open	ACORE	3	50.00	74.07	STATE	53390
Dept		Fund		Program		SID	
DAS2920		11000		14000		10020	
Open QTY		PC BU		Project		Open Amt	
3		NONPC		DAS_NONPROJECT		0.00	
GL Base Amount		Currency		Sequence		Capitalize	
74.07		USD		0		N	

View Print

The **View Print** action displays a printable version of the requisition. The user will be prompted to choose whether to include distribution details or to view it without those details.

Cancel

The **Cancel** action will cancel the requisition.



Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Name	Request State	Budget Status	Total Amount
	ILT Example 2	DASM1/0000008921	09/04/2024	DAS-		Canceled	Valid	0.00 USD
	ILT Example	DASM1/0000008920	09/04/2024	DAS-		Pending	Not Chk'd	26.53 USD

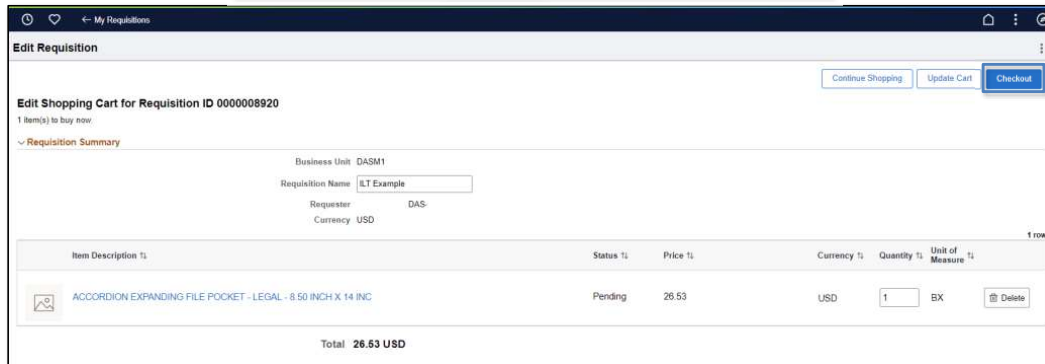
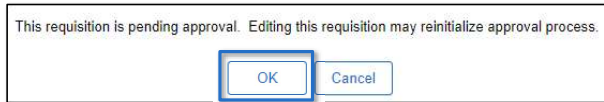
Canceling a Requisition job aid.docx

Cancel

The **Cancel** action will terminate the requisition. You will be prompted with, "Are you sure you want to do this?" Once canceled, the request state will be marked as canceled.

Edit

The **Edit** action allows the user to edit the requisition. A pop-up window appears, indicating that editing a requisition may restart the approval process. Click 'OK' to acknowledge. Click **Checkout** to proceed.



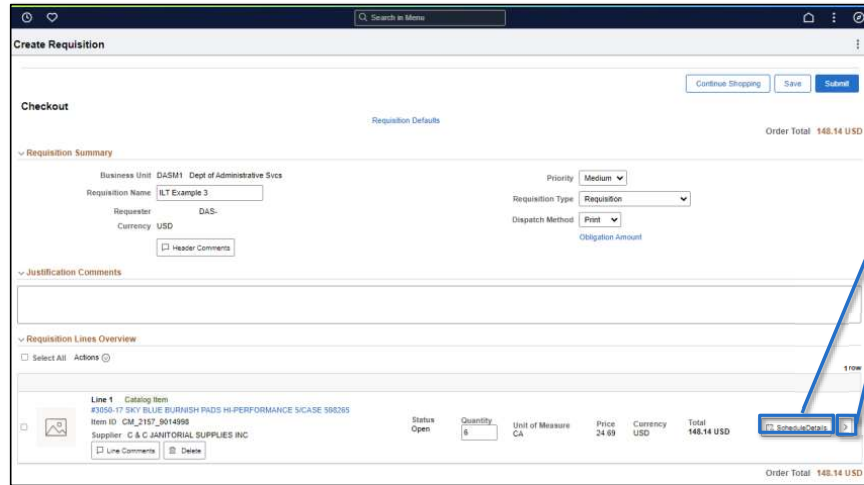
56

Edit

The **Edit** action allows the user to modify the requisition. A pop-up window will appear, informing you that editing a requisition may restart the approval process. Click '**OK**' to acknowledge this message, then click **Checkout** to proceed. You can make Req

Edit

Click the **Schedule Details** button or the > to navigate to the **Line Details** page to make edits to the requisition.



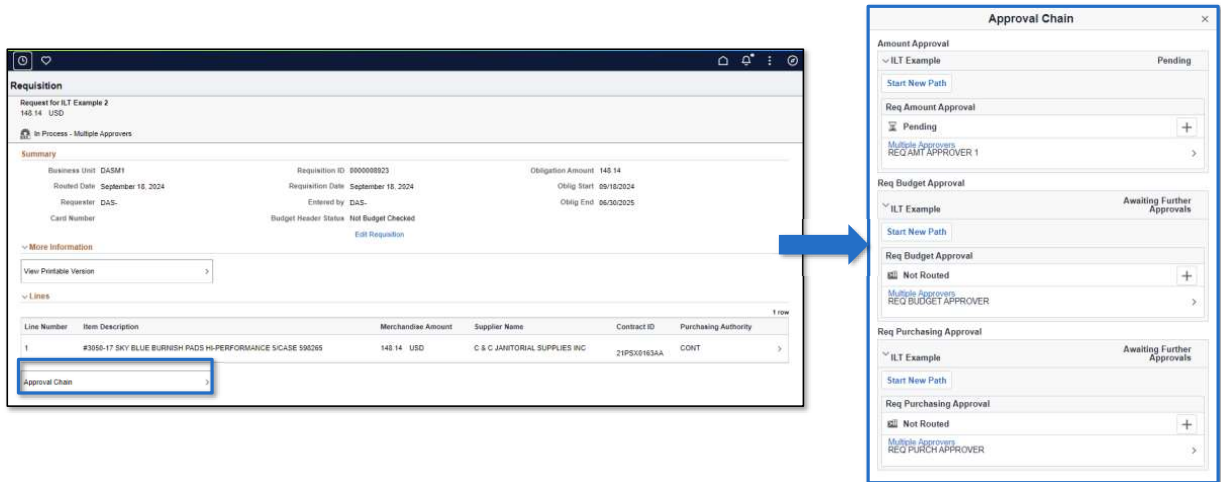
Clicking the **Schedule Details** button brings you to the Schedule Details page where Distributions are displayed.

Clicking the > brings you to the **Line Details** page.

To make edits, click the **Requisition Defaults** hyperlink, or **Schedule Details** button or the arrow ">" to review or change the **Line Details/ Schedule Details** pages.

View Approval

The **View Approval** action allows the user to see where the requisition is in the approval process.



Review_Approval_History_Job_Aid.docx

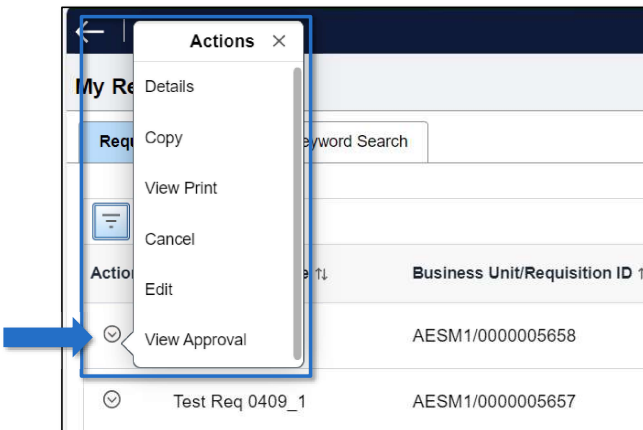
Approval Chain

The **Approval Chain** action enables the user to see the current status of the requisition in the approval process.

At the bottom, there is a hyperlink to the **Review Approval History** job aid.

My Requisitions Key Points

Click Actions drop down list to select an action for the requisition you are working on:



- ▶ **Details:** Displays the requisition lifeline.
- ▶ **Copy:** Copies the original requisition line details and coding. Punch-Out Requisitions cannot be copied.
- ▶ **View Print:** Brings up a Printable version.
- ▶ **Cancel:** Displays a pop-up window confirming you wish to cancel the requisition.
- ▶ **Edit:** Allows users to edit the requisition (name, quantity, etc.)
- ▶ **View Approval:** Displays who approved the requisition and at what stage in approvals it is currently.

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To review:

Click Actions drop down list to select an action for the requisition you are working on:

- ✓ **Details:** displays the requisition lifeline
- ✓ **Copy:** Copies the original requisition line details and coding. Punch-Out Requisitions cannot be copied.
- ✓ **View Print:** Brings up a printable version.
- ✓ **Cancel:** Brings up a pop-up window confirming you wish to cancel the requisition.
- ✓ **Edit:** Allows users to edit the requisition (name, quantity, etc.)
- ✓ **View Approval:** displays who approved the requisition and what stage in approvals it is currently at.

Updated Job Aids

Job Aid Name	Job Aid Links
Copying an Existing Requisition	Copying an Existing Requisition.docx
Review Approval History	Review_Approval_History_Job_Aid.docx
Viewing a Copy of a Requisition	Viewing_a_copy_of_a_REQ.docx
Canceling a Requisition	Canceling a Requisition job aid.docx

Job Aids for Managing Requisitions

Here are the job aids associated with managing requisitions:

1.Copy an Existing Requisition -

Steps for copying requisitions based on past orders.

2.Review Approval History -

Information on checking the approval

status of requisitions.

What Questions Are There?



- ▶ Post questions within the chat

Are there any questions about what was discussed in **Unit 1: Creating Requisitions**? If you have any specific topics or points you'd like to revisit, feel free to ask!

Unit 3: Approvals



In this unit, we'll go over the Approvals process. This session will guide you through the streamlined and intuitive Approvals interface, designed to improve the efficiency and transparency of the approval process.

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Approvals

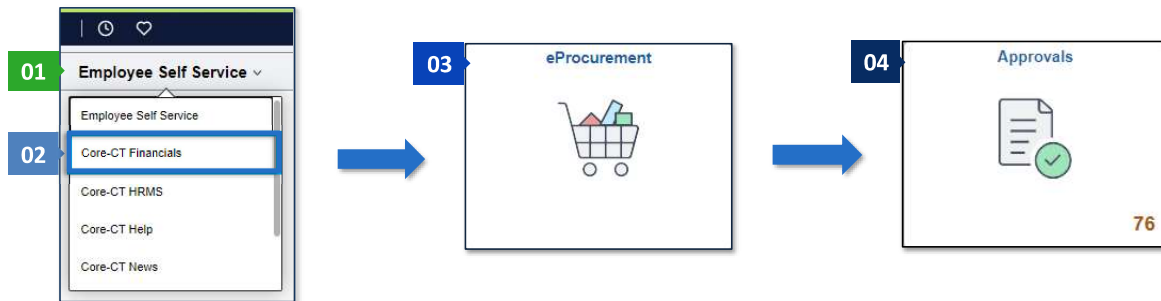
In this unit, we will cover the Approvals process. This session will guide you through the streamlined and intuitive Approvals interface, designed to enhance the efficiency and transparency of the approval workflow.

Key topics will include:

- Navigating the Approvals interface
- Understanding approval statuses
- Managing and tracking approvals effectively

Navigation to Approvals

- 01 Navigate to the **Employee Self Service** homepage.
- 02 Select **Core-CT Financials** from dropdown menu.
- 03 Click the **eProcurement** Tile.
- 04 Click the **Approvals** Tile.



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Approvals Navigation

1. Navigate to **Employee Self Service**
2. Select **Core-CT Financials** from dropdown menu.
3. Click **eProcurement** Tile.
4. Click **Approvals** Tile

Approvals Overview

- ▶ **Review and Approve Requests:** Approvers can quickly review requisitions, view all relevant details and access Approval options directly from the Approvals page.
- ▶ **Integrated Workflow:** The approvals process is integrated with the overall requisition lifecycle, ensuring that all necessary documentation, and compliance steps, are completed before approval.

Throughout this session, we'll explore how to navigate the **Approval** screens, process requisitions efficiently, and manage common tasks such as **adding comments** and **reviewing history** for a complete audit trail.

This streamlined process not only enhances visibility for approvers but also ensures compliance with your organization's procurement policies.

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•**Quick Review:** Approvers can efficiently review requisitions, view all relevant details, and access approval options directly from the Approvals page.

•**Integrated Workflow:** The approvals process is seamlessly integrated with the overall requisition lifecycle, 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
- Process requisitions efficiently
- Manage common tasks such as adding comments and reviewing history for a complete audit trail

This streamlined process enhances visibility for approvers and ensures compliance with your organization's procurement policies.

Pending Approvals

On the **Pending Approvals** page, the user sees **Requisitions** and **Purchase Orders** that are pending approvals, based on the user's role.

View By	Type	All
All	77	01
Purchase Order	12	02
Requisition	65	03

Type	Amount	USD	Item Description	Vendor	Approver	Status	Date
Requisition	1,240.00	USD	/ Legal Review - GovQA	SHI INTERNATIONAL CORP	Req Budget Approver	Routed	09/19/2023
Requisition	90,160.00	USD	/ CAS Plant Cooling Tower Repair	INTERNATIONAL COOLING TOWER USA INC	Req Amount Approver 1	Routed	09/25/2023
Requisition	3,300.00	USD	/ CAS Plant Boiler Inspection	POWER RESOURCES INC	Req Amount Approver 1	Routed	09/29/2023
Requisition	102.38	USD	/ CAS Plant Fan Belts	GRAINGER INDUSTRIAL SUPPLY	Req Amount Approver 1	Routed	09/29/2023
Requisition	100,013.00	USD	/ Bldg_Sht_a Silver Onspring	SHI INTERNATIONAL CORP	Req Amount Approver 3	Routed	10/05/2023
Requisition	148.34	USD	/ CAS Plant Heater motor 2	RELIABLE ELECTRIC MOTOR INC	Req Amount Approver 1	Routed	10/05/2023
Purchase Order	1.00	USD	/ PFM D Hobbs PC 2735	JP MORGAN CHASE BANK	PO Amt Approver Less than \$10K	Routed	10/05/2023

01 # of POs pending Approval

02 # of Requisitions pending Approval

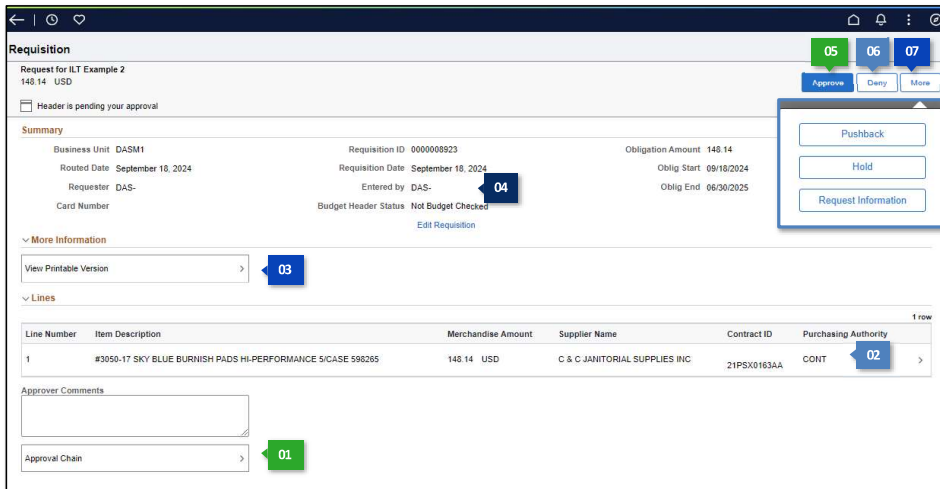
03 Clicking the Req/PO will direct the user to that Req/PO.

On the **Pending Approvals** page, the user can see:

- # of POs pending Approval
- # of Requisitions pending Approval

Clicking on a requisition or purchase order will direct the user to that specific item for further review.

Requisition Approval



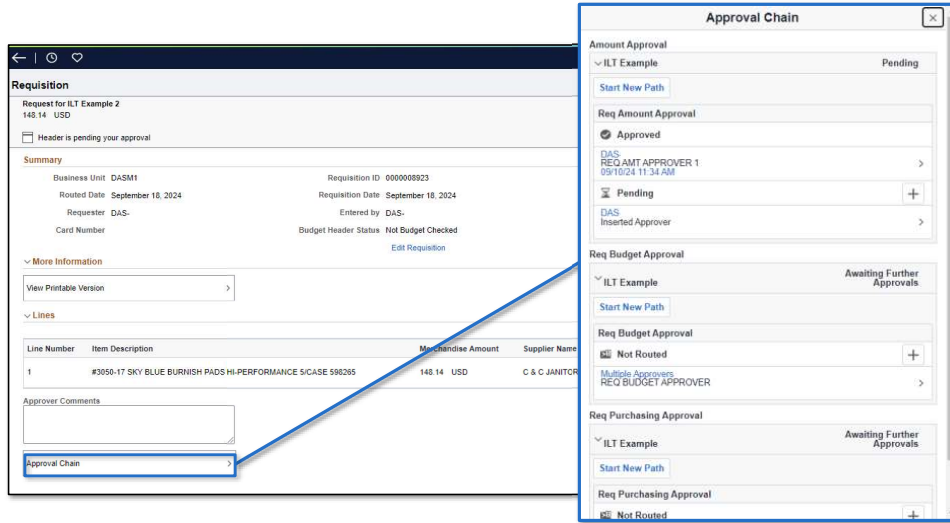
- 01 View Approval Chain
- 02 Approval Line Detail
- 03 View Printable Version
- 04 Edit Requisition
- 05 Approve
- 06 Deny
- 07 More

On the **Requisition Approval Page**, you have the following options:

- View Approval Chain
- Approval Line Details
- View Printable Version
- Edit Requisition
- Approve
- Deny
- And More, where you can find options for Pushback, Hold, and Request Information.

Approval Chain

Clicking the **Approval Chain** box displays the multiple steps in the approval process and their status.



Review_Approval_History_Job_Aid.docx

Clicking the **Approval Chain** box displays the various steps in the approval process along with their current status.

At the bottom, you will find hyperlinks to the **Review Approval History** job aids.

Approval Line Detail

Selecting a **Line** displays the **Approval Line Detail** page which shows the **Line Details** and **Shipping Information** of the specific line item selected. Clicking on the line under **Shipping Information** brings up the **Distribution** details.

The screenshot displays the 'Approval Line Detail' page for a request for 'ILT Example 2' with a total amount of 148.14 USD. The selected line is '#3050-17 SKY BLUE BURNISH PADS HI-PERFORMANCE 5/CASE 598265' with a quantity of 6 CA and a price of 24.69 USD. The 'Shipping Information' section shows a schedule with a ship to address of 0640000558, a quantity of 6 CA, a price of 24.69 USD, and a total amount of 148.14 USD. A 'Distributions' pop-up window is shown, providing a detailed breakdown of the line's distribution across two entries.

Distribution Line	Requestion Quantity	GL Business Unit	Merchandise Amount	Currency	Fund Code	Department	SID	Program Code	Account	Budget Reference	ChartField 1	ChartField 2	ChartField 3	PC Business Unit	Project
1	3.0000	STATE	74.07	USD	11000	DAS23920	10020	14000	53390					NONPC	DAS_NONPROJ
2	3.0000	STATE	74.07	USD	11000	DAS23920	10020	14000	53390					NONPC	DAS_NONPROJ

Selecting a **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** details.

View Printable Version

Clicking **View Printable Version** brings up a printable version of the requisition.

The screenshot shows a requisition system interface. On the left, a sidebar contains a 'View Printable Version' button. A blue arrow points from this button to a detailed view of a requisition on the right. The detailed view includes a header with requisition details, a table of line items, and a summary table.

Requisition Summary:

- Business Unit: DASMT
- Requisition ID: 00008820
- Requester: DAS
- Entered Date: 9/19/24
- Requisition Date: September 4, 2024
- Requester: DAS
- Entered By: DAS
- Card Number: [Redacted]
- Budget Header Status: Not Budget Checked
- Start Date for Gen Standing PO: 2024-09-18
- End Date: 2025-06-30
- Custom Field 1: PRV

Line Items:

Line #	Item Description	Quantity	UOM	Price	Line Total
1	ACCORDION EXPANDING FILE POCKET - LEGAL - 8 1/2 INCH X 14 INCH	8.0000	USD	24.8000	198.40
2	8R1338 (04470A) REMANUFACTURED LASER CARTRIDGE BLACK	1.0000	USD	160.77	160.77
3	8R1341 (04473A) REMANUFACTURED LASER CARTRIDGE MAGENTA	1.0000	USD	57.47	57.47
4	ACCO DEAL PAPER CLAMPS (BUTTERFLY CLAMPS) SILVER SMALL 50 P	102.00	USD	1.12	114.24

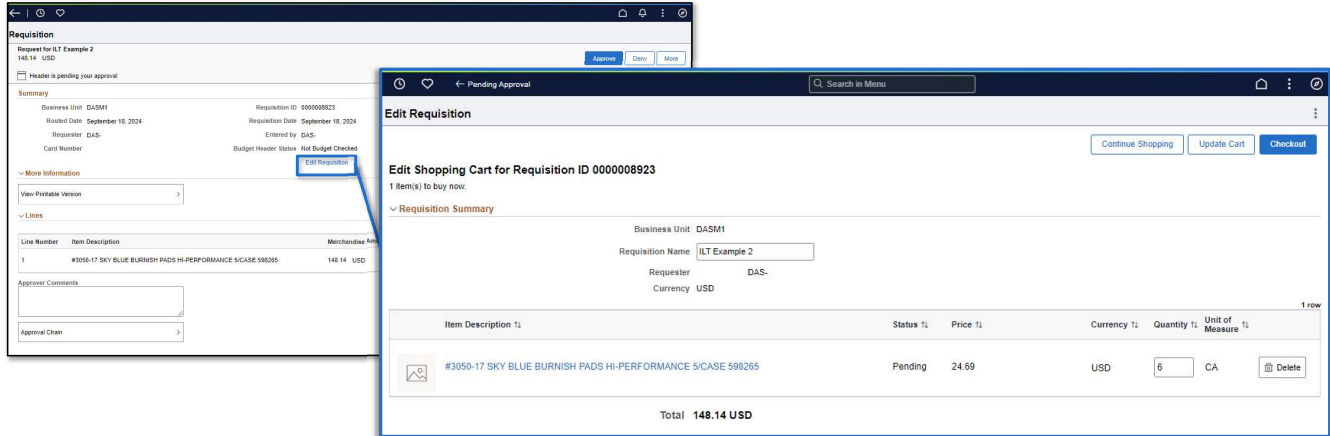
Summary Table:

Line #	Status	Location	Qty	Percent	Amount	GL Unit	Account
1	Open	ACRFB	8.0000	82.00	198.40	57878	63500
Dial		Fund			Program	MD	
DAS0202		11000			1000		1000
Open QTY		PC BU			Project	Open AMT	
8.0000		NMFC			DAS_MCHNGELECT		14.0700
GL Base Amount		Carrying			Sequence	ExpDate	
198.40		USD			0	N	

Clicking **View Printable Version** brings up a printable version of the requisition, you have the option to view with or without the distribution details.

Edit Requisition

Clicking **Edit Requisition** brings up the **Edit Requisition** page allowing the approver to edit the requisition. Click **Checkout** to proceed.



Approving_Requisition_After_Editing_Job_Aid.docx

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Clicking **Edit Requisition** opens the Edit Requisition page, allowing the approver to make changes to the requisition. Click **Checkout** to proceed.

At the bottom, there is a hyperlink to the **Approving Requisition After Editing** job aid.

Edit Requisition

Click the **Schedule Details** button or the > to navigate to the **Line Details** page to make edits to the requisition.

Clicking the **Schedule Details** button brings you to the Schedule Details page, where you can also access the Distributions

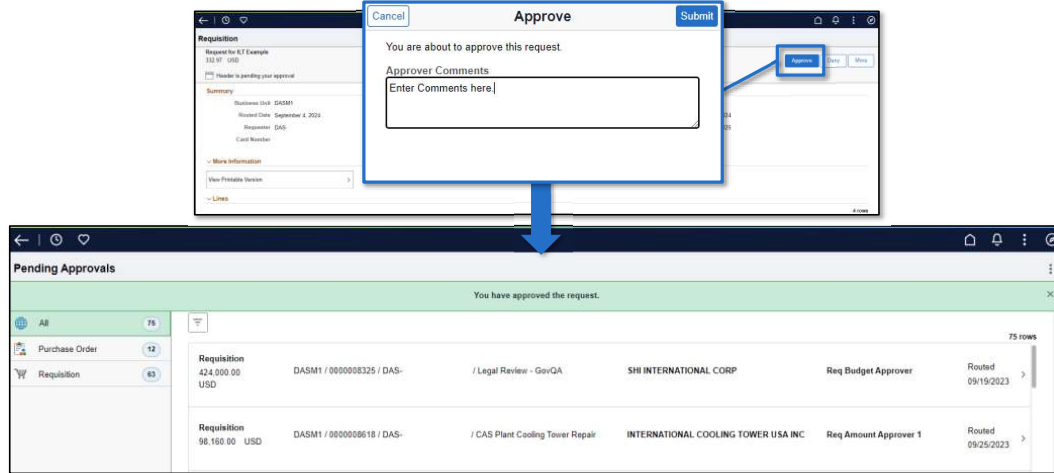
Clicking the > brings you to the **Line Details** page.

Approving_Requisition_After_Editing_Job_Aid.docx

Click the **Schedule Details** button or the > to navigate to the **Line Details** page to make edits to the requisition.

Approve

Clicking **Approve** prompts the user to enter **Approver Comments** before clicking **Submit** to approve the requisition. Comments are not required for Approvals. A notification appears on the **Pending Approvals** page and is no longer visible to this approver.



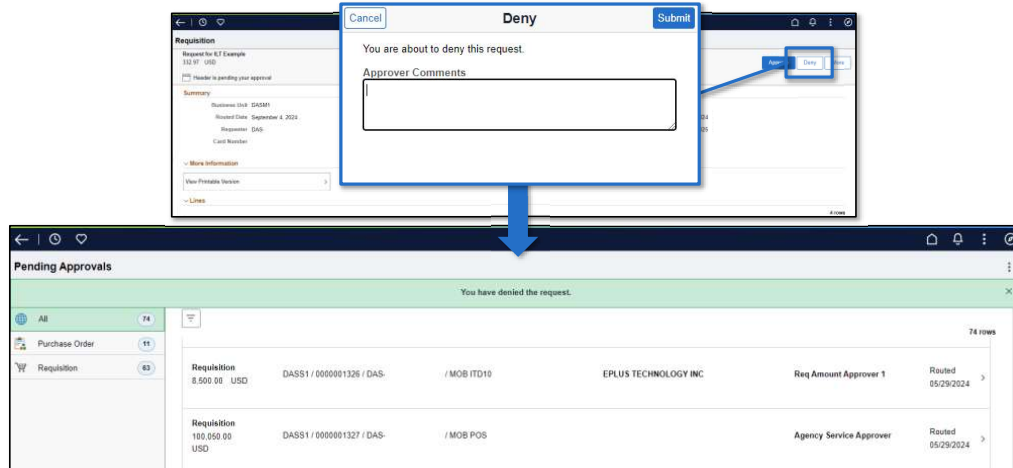
Requisition Approvals.docx

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Clicking **Approve** prompts the user to enter Approver Comments before clicking **Submit** to approve the requisition. Comments are not required for the Approve Action. Clicking Submit will Approve the req, which will drop from the current Approver's level, and move to the next level of approvals. An Alert Notification will go to the Requester once a req is fully Approved.

Deny

Clicking **Deny** prompts the user to enter **Approver Comments** before clicking **Submit** to deny the requisition. Comments are required for **Deny**. A notification appears on the **Pending Approvals** page and the requisition is terminated.



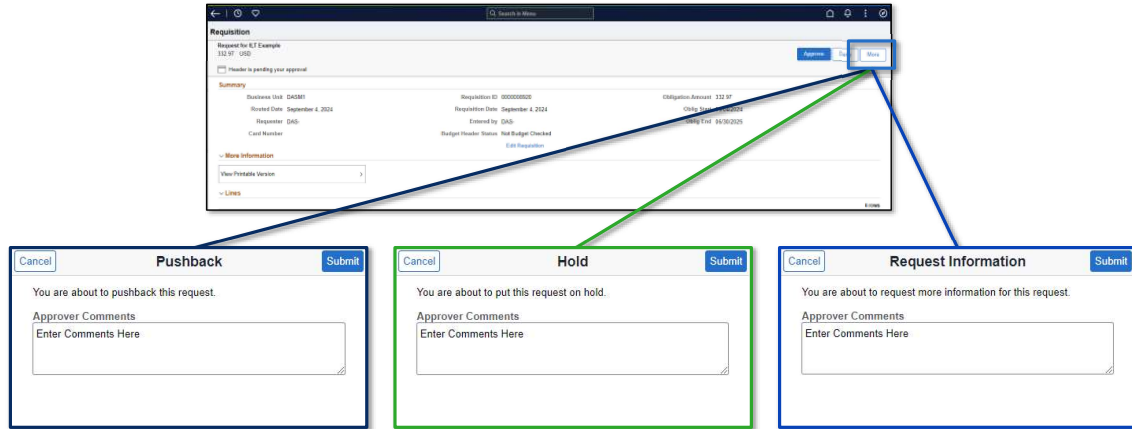
Requisition Approvals.docx

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Clicking **Deny** prompts the user to enter **Approver Comments** before clicking **Submit** to deny the requisition. Comments are required for **Deny**. An Alert notification goes to the Requester and the requisition is terminated from the workflow.

More

Clicking **More** brings up more options including **Pushback**, **Hold**, and **Request Information**. Comments are required for these functions.



Requisition Approvals.docx
Placing_a_Requisition_on_Approval_Hold.docx

Clicking **More** brings up more options including **Pushback**, **Hold**, and **Request Information**. Comments are required for these functions.

Updated Job Aids

Job Aid Name	Job Aid Links
Approving Requisition After Editing	Approving_Requisition_After_Editing_Job_Aid.docx
Review Approval History	Review_Approval_History_Job_Aid.docx
Placing a Requisition on Approval Hold	Placing_a_Requisition_on_Approval_Hold.docx
Add ADHOC Approver/Reviewer	Add Adhoc Approver_Reviewer.docx
Requisition Approvals	Requisition Approvals.docx

Here you have the job aids associated with approvals.

What Questions Are There?



- ▶ Post questions within the chat

Are there any questions on **Unit 3: Approvals**? If you need any clarification or have specific inquiries, feel free to ask!

Unit 4: My Receipts



In this unit, we'll cover creating and managing receipts in 'My Receipts' using the new Fluid UI, highlight navigation changes, and demonstrate how receipts are managed within the Fluid interface.

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In this unit, we'll cover creating and managing receipts in 'My Receipts' using the new Fluid UI, highlight navigation changes, and demonstrate how receipts are managed within the Fluid interface.

Receipts Overview

A receipt is created to accept item(s) or services received. The receipt is then saved, and the vendor payment process continues in the Accounts Payable module.

- ▶ **Receipts are required for all Purchase Orders.**

- ▶ Receiving can be done in both **Purchasing** and **eProcurement** modules:
 - The PO must be dispatched.
 - The user needs the **General Receiver** or **Casual Receiver** role to receive.
 - **Casual receivers** are limited to receiving dispatched POs that originate from requisitions they created.

Receipts Overview

- Receipts are required for all Purchase Orders.
- Receiving can be done in both purchasing and eProcurement modules
- The PO must be dispatched
- The user needs the General Receiver or Casual Receiver role to receive.
- Casual receivers are limited to receiving dispatched POs that originate from requisitions they created.

Navigation to Add/Update Receipts

- 01 Navigate to the **Employee Self Service** homepage.
- 02 Select **Core-CT Financials** from dropdown menu.
- 03 Click the **eProcurement** Tile.
- 04 Click the **Add/Update Receipts** tile to add and update receipts.



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To navigate to receipts using the fluid interface:

1. Navigate to **Employee Self Service**
2. Select **Core-CT Financials** from dropdown menu.
3. Click **eProcurement** Tile.
4. Click **Add/Update Receipts** tile

Add/Update Receipts

To add a receipt, click the **Add New Receipt** hyperlink.

To update a receipt, select the **Purchase Order** to receive, then enter the search criteria (**PO ID**).

Make sure to delete the defaulted **Ship To** value before searching.

The screenshot displays the 'Manage Receipts' interface. At the top, there is a search bar and navigation icons. Below this, the 'Search Criteria' section includes fields for 'Received Date From' (08/13/2024), 'To' (09/12/2024), 'Business Unit' (DASM1), 'PO Unit', 'Receipt ID', and 'Show Status' (Received//Open). A 'Ship To' field is highlighted with a red box, and a 'PO ID' field is highlighted with a blue box. A green box highlights the 'Add New Receipt' link. Below the search criteria, there are several action links: 'Add New Receipt', 'Process Receipts', 'Inspection', 'Review ASN Receipt', and 'Manage Return To Suppliers'. A message states 'You have no received/open receipts.' At the bottom, there are links for 'Return to Manage Requisitions' and 'Requisition Cycle'.

To add a receipt, click the **Add New Receipt** hyperlink.

To update a receipt, search the purchase order you wish to receive, Be sure to delete the defaulted **Ship To** value before conducting the search.

Add/Update Receipts

After searching by **PO ID**, click **Details** to navigate to the **Receiving** page.

The screenshot shows the 'Manage Receipts' interface. At the top, there is a search bar and navigation icons. Below that, the 'Search Criteria' section includes fields for 'Received Date From' (07/14/2024), 'To' (08/13/2024), 'Show Status' (Received/Open), 'Business Unit' (DASM1), 'Receipt ID', 'PO Unit', and 'PO ID' (0000020999). There are 'Search' and 'Clear' buttons. Below the search criteria, there are several action links: 'Add New Receipt', 'Process Receipts', 'Inspection', 'Review ASN Receipt', and 'Manage Return To Suppliers'. The main section is titled 'Receipts' and contains a table with the following data:

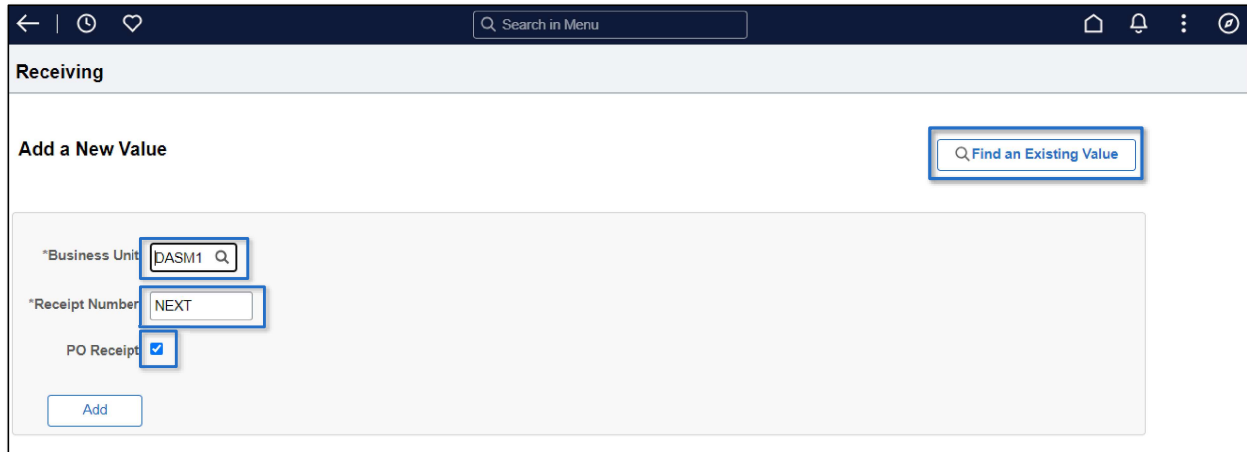
Business Unit	Receipt ID	Date	PO ID	Supplier	Status	Details	Refresh	Print	Export	Import
DASM1	0000091312	07/26/2024	0000020999	SAVCLB6973-001	Received					
DASM1	0000091311	07/26/2024	0000020195	COVEND2270-001	Received					

At the bottom of the table, there are links for 'Return to Manage Requisitions' and 'Requisition Cycle'. A blue box highlights the 'Details' icon in the first row of the table.

After searching by **PO ID**, click the **Details** icon to navigate to the **Receiving** page.

Add a New Receipt

On the **Receiving** page, to add a new value, ensure the correct **Business Unit** is selected and check the **PO Receipt** box. The **Receipt Number** is automatically generated. User can also **Find an Existing Value** to search for an existing receipt.



The screenshot shows a web application interface for adding a new receipt. At the top, there is a navigation bar with a search box labeled "Search in Menu" and several icons. Below the navigation bar, the page title "Receiving" is displayed. The main content area is titled "Add a New Value" and contains a form with the following fields:

- *Business Unit: A dropdown menu with "DASM1" selected and a search icon.
- *Receipt Number: A text input field containing "NEXT".
- PO Receipt: A checkbox that is checked.
- An "Add" button at the bottom left of the form.

There is also a button labeled "Find an Existing Value" with a search icon, located in the top right corner of the form area.

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On the **Receiving** page, to add a new value, ensure the correct **Business Unit** is selected and check the **PO Receipt** box. The **Receipt Number** is automatically generated. User can also select **Find an Existing Value** to search for an existing receipt.

Add a New Receipt

Here, the user inputs information into the **Search Criteria** fields to locate and update an existing Purchase Order.

The screenshot shows a software window titled "Add/Update Receipts". It features a "Select Purchase Order" section with "Search Criteria" fields. The fields include PO Unit (DASM1), ID, Line, Release, Item ID, Ship To, Ship Via, Days +/- Today (30), Start Date (08/13/2024), End Date (10/12/2024), Supplier Name, Supplier Item ID, Manufacturer ID, Manufacturer's Item ID, and UPN ID. There are also checkboxes for "Retrieve Open PO Schedules" and "Retainage". Below the search criteria is a "Retrieved Rows" section with a table. The table has columns: Sel, PO Unit, PO ID, Line, Sched, Release, Due Date, PO Qty, Prior Receipt, Item, and Description. One row is visible with the following data: Sel (checkbox), PO Unit (DASM1), PO ID (0000020754), Line (1), Sched (1), Release (604), Due Date (08/13/2024), PO Qty (1.0000), Prior Receipt (5.0000), Item (ITFIS: Javid Nasibov's Rate (B)), and Description (ITFIS: Javid Nasibov's Rate (B)).

Sel	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description
<input type="checkbox"/>	DASM1	0000020754	1	1	604	08/13/2024	1.0000	5.0000	ITFIS: Javid Nasibov's Rate (B)	ITFIS: Javid Nasibov's Rate (B)

Here, the user inputs information into the **Search Criteria** fields to locate and update an existing Purchase Order.

Add a New Receipt

On the **Receiving** page, enter information such as received quantities and shipping details as applicable. Users may also need to update information like delivery dates or receiving locations. Save to complete the process and generate the receipt record in the system.

Line	Item	Description	Receipt Qty	Receipt Price	Penalty	Accept Qty	Status	Close Short	Serial	Device Track	Device Track
1		ITPS: Javid Nasibov's Rate	1.0000	150480.00000	Penalty	1.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Device Track

On the **Receiving** page, enter information such as received quantities and shipping details as applicable. Users may also need to update information like delivery dates or receiving locations. Save to complete the process and generate the receipt record in the system.

Find an Existing Value

Enter the Receipt Number, Purchase Order Number (PO Number), or Supplier ID into the corresponding search fields.

Enter the Receipt Number, Purchase Order Number (PO Number), or Supplier ID into the corresponding search fields.

Find an Existing Value

Review the **Search Results** and select the relevant receipt to view or update.

Search Results
Only the first 300 results of a possible 88320 can be displayed. Business Unit "DASM1"

Business Unit	Receipt Number	Bill of Lading	PO Business Unit	Item ID	PO Number	PO Receipt	Receive Source	Ship To Location	Shipment Number	Supplier ID	Supplier Name 1	Received Date	Receipt Status	User ID	Description	Retainage	
DASM1	20408	(blank)	DASM1	(blank)	0000020408	Y	On-line	0640000558	(blank)	0000188868	ROADSTONE LLC	05/11/2023	Received		DAS-	(blank)	>
DASM1	1864	(blank)	DASM1	(blank)	0000009259	Y	On-line	0430000023	(blank)	0000010075	DELL MARKETING LP	09/25/2013	Moved		OSC-	(blank)	>
DASM1	14732	(blank)	DASM1	(blank)	0000008913	Y	On-line	0640000035	(blank)	0000012108	FIP CONSTRUCTION INC	03/31/2014	Received		DAS-	(blank)	>
DASM1	10300	(blank)	DASM1	(blank)	0000010300	Y	On-line	0640000035	(blank)	0000012838	FLETCHER THOMPSON INC	07/21/2014	Received		DAS-	(blank)	>
DASM1	0NEXT	(blank)	DASM1	(blank)	0000019694	Y	On-line	0640000558	(blank)	0000059169	JP MORGAN CHASE BANK	10/31/2022	Received		DAS-	(blank)	>
DASM1	0000091312	(blank)	DASM1	(blank)	0000020999	Y	On-line	0640000558	(blank)	0000020356	SAVOL BLEACH COMPANY	07/26/2024	Received	ACC_	Accenture	(blank)	>
DASM1	0000091311	(blank)	DASM1	(blank)	0000020195	Y	On-line	0640000550	(blank)	0000180585	COVENDIS	07/26/2024	Received	ACC_	Accenture	(blank)	>
DASM1	0000091310	(blank)	DASM1	(blank)	0000020984	Y	On-line	0640000558	(blank)	0000000089	NEW BRITAIN CITY TREASURER	05/28/2024	Received		DAS-	(blank)	>
DASM1	0000091309	(blank)	DASM1	(blank)	0000021058	Y	On-line	0640000558	(blank)	0000010334	W B MASON COMPANY INC	05/16/2024	Received		DAS-	(blank)	>
DASM1	0000091308	(blank)	DASM1	(blank)	0000021025	Y	On-line	0640000550	(blank)	0000064731	EPLUS TECHNOLOGY INC	02/29/2024	Moved		DAS-	(blank)	>

Review the **Search Results** and select the relevant receipt to view or update.

Navigation to My Receipts

- 01 Navigate to the **Employee Self Service** homepage.
- 02 Select **Core-CT Financials** from dropdown menu.
- 03 Click the **eProcurement** Tile.
- 04 Click the **My Receipts** tile to view and update receipts.



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To navigate to receipts using the fluid interface:

1. Navigate to **Employee Self Service**
2. Select **Core-CT Financials** from dropdown menu.
3. Click **eProcurement** Tile.
4. Receipts can be viewed and updated in the **My Receipts** tile
5. Click **My Receipts** tile

My Receipts

On the My Receipts page, the user sees active receipts they have created. The search criteria filters adjust the results depending on user security. The user has the option to click **Activities**, **Delivery Information**, and/or **Edit Receipts**.

Business Unit T1	Receipt ID T1	Date T1	PO ID T1	Short Supplier Name T1	Status T1
DASM1	0000091309	05/16/2024	0000021058	WBMASO5641-001	Received
DASM1	0000091310	05/28/2024	0000020984	NEWBRIT089-001	Received

Please note: The **ChartFields** and **Manual Close Landed Cost** icons are displayed but are currently **not active functions**.

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My Receipts

On the **My Receipts** page, the user can view active receipts they have created. The search criteria filters adjust the results based on the user's security permissions.

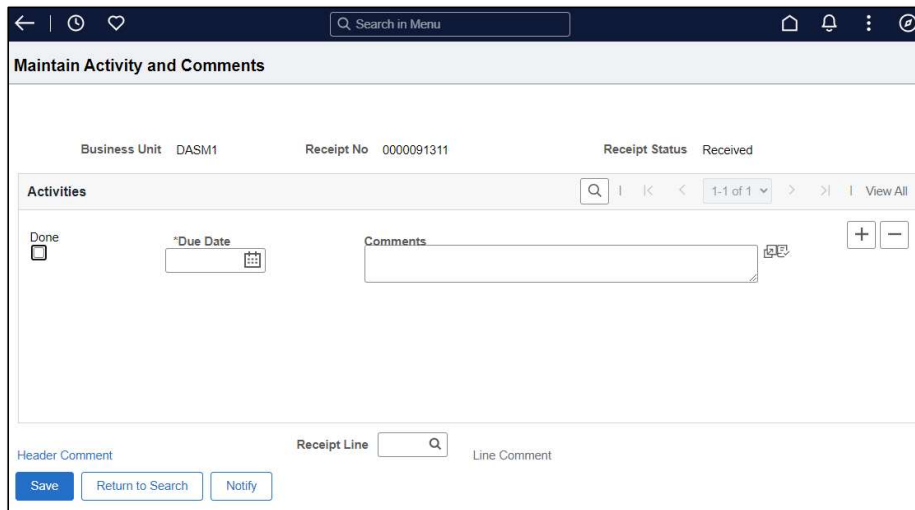
Users have the following options:

- Click on **Activities**
- View **Delivery Information**
- Edit **Receipts**

Please note that the **Chartfields** and **Manual Close Landed Cost** icons are displayed but are currently inactive functions.

Maintain Activity and Comments

On the **Maintain Activity and Comments** page, the user has the option to track activity history and add comments.

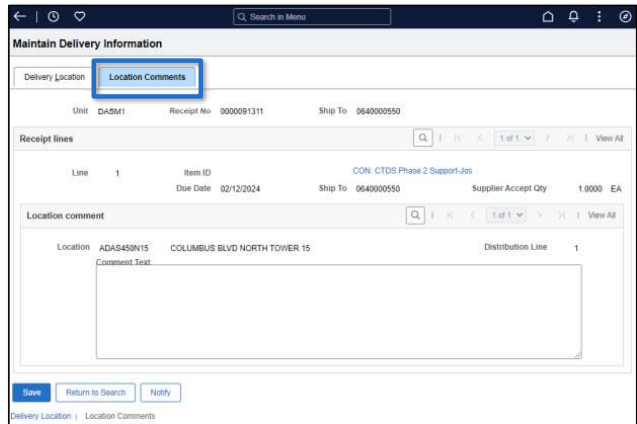
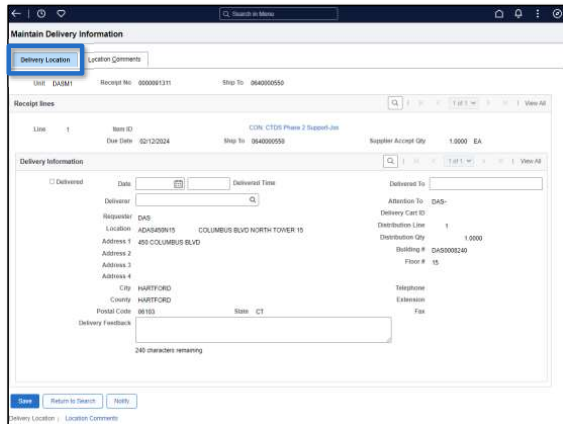


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On the **Maintain Activity and Comments** page, the user has the option to track activity history and add comments.

Delivery Information

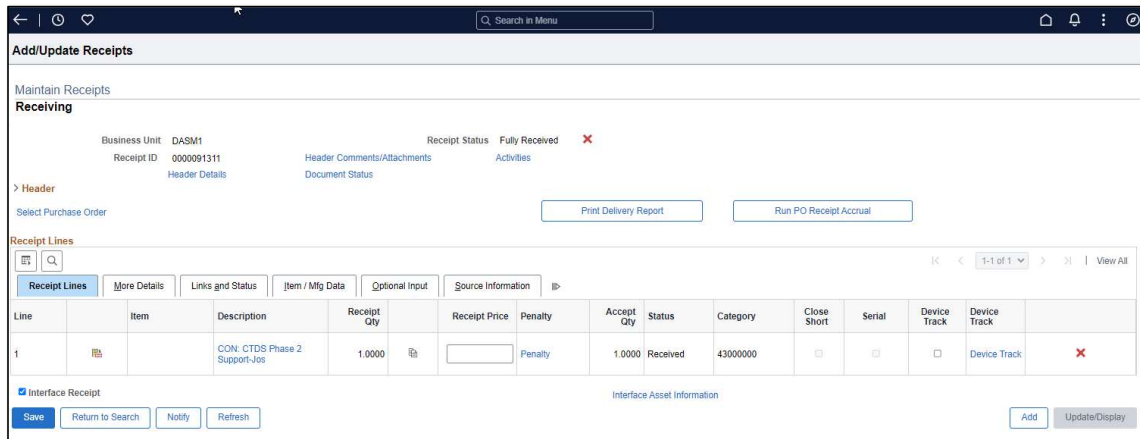
On the **Maintain Delivery Information** page, there are two tabs, **Delivery Location** and **Location Comments**. The user adds or updates delivery information under the **Delivery Location** and **Location Comments** tabs as needed.



On the **Maintain Delivery Information** page, there are two tabs, **Delivery Location** and **Location Comments**. The user adds or updates delivery information under the **Delivery Location** and the **Location Comments** tabs as needed.

Edit Receipts

Clicking on the **Edit Receipts** icon directs the user to the Add/Update Receipts page where they can make modifications to the selected receipt.



Clicking on the **Edit Receipts** icon directs the user to the Add/Update Receipts page where they can make modifications to the selected receipt.

Receipts Key Points

- ▶ **A receipt is created to accept item(s) or services received.**
 - Optional information for the receipt of items, such as comments can be entered. The receipt is then saved, and the vendor payment process continues in the Accounts Payable module.
- ▶ **To receive in the eProcurement module,**
 - The associated PO must be dispatched
 - The **Casual Receiver** or **General Receiver** role is required.
- ▶ **The Receipt Date is the date the item(s) were received.** It is not the date the receipt is created in Core-CT. Edit the Receipt Date field, if appropriate.

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Receipts Key Points

To recap:

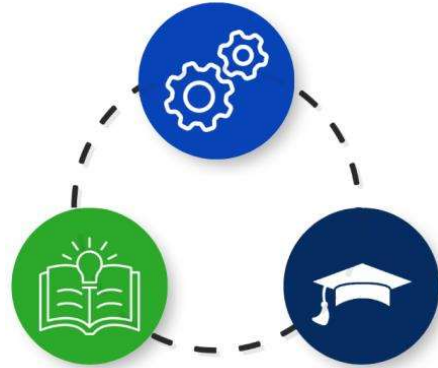
- Receiving is required for all Requisitions. A receipt is created to accept item(s) or services received. Optional information for the receipt of items, such as comments can be entered. The receipt is then saved, and the payment process continues in the Accounts Payable module.
- To receive in the eProcurement module, the associated PO must be dispatched. Either the Casual Receiver or General Receiver role is required.
- The Receipt Date is the date the item(s) were received.

It is not the date the receipt is created in Core-CT. Edit the Receipt Date field, if appropriate.

Let's Review our Learning Objectives:

You're now familiar with:

- ▶ Create a new requisition
- ▶ Manage existing requisitions
- ▶ Requisition Approvals
- ▶ Create new receipts
- ▶ Manage existing receipts



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Learning Objectives Review

You are now familiar with:

- Creating a new requisition
- Managing existing requisitions
- Understanding requisition approvals
- Creating new receipts
- Managing existing receipts

What Questions Are There?



- ▶ Post questions within the chat

Are there any questions on **Unit 4: My Receipts**? If you need clarification or have specific inquiries, feel free to ask!

Post Training Follow Ups

Please enter a FootPrints ticket with any questions:

- URL: <https://footprints.ct.gov/footprints>
- FootPrints tickets route directly to the Teams
- If FootPrints Access is needed please email the readiness mailbox with the Subject: FootPrints Access
- Readiness@ct.gov (anyone without a ct.gov email address)



Do you have any questions?

Congratulations on completing the eProcurement Course!

- ▶ Complete the Training Evaluation.
[eProcurement Course Survey](#)
- ▶ Review the course material after Training completion.
[Training Material Location](#)
- ▶ Reference the Core-CT Modernization site for more information:
[Core-CTModernizationProject\(state.ct.us\)](#)



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Congratulations!

You have successfully completed the eProcurement Course!

Please take a moment to complete the training evaluation; your feedback is greatly appreciated.

The course material is available for your reference and will be posted in the chat.

For more information, please visit the **Core-CT Modernization** site. Thank you for your participation!