L200EP006 - eProcurement-20241024_134924-Meeting Recording

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Bello-Persson, Maty 0:09

Good morning, everyone.

Welcome to the Epocuan fluid interface.

Course. My name is Maddie Lucas and I will be your presenter today.

I've been with the state for 24 years, of course.

CT for 12 and the last two of the procurement modules at this time, we'd like to ask that you please put your cell phones on vibrate. Keep engaged and if you have any questions, use the Q&A section that shows next to chat.

Top of your screen to ask them.

We will address them at the end of each unit.

Today we will go over the changes in the procurement with this upgrade.

We have 3 Volt today as your trainer. I will cover the content of the course and go over the functionality of April and Fluid channel. Rooter will be our facilitator and we'll share the presentation and monitor the Q&A section and as the participants you are welcome.

To ping your questions in the Q&A section, but your camera and microphone will be disabled as we are in webinar mode.

User interface when you hear the term fluid, think of the input pages adapting to the various screen sizes of different mobile devices such as cell phones and tablets.

The Fluid user interface is responsive and easy to use.

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

The end of this course you will be able.

To create and manage requisitions in fluid, understand the approval process and create and manage receipt.

Our agenda.

We have allotted approximate times for each of the units we will review and for questions at the end of each of each unit.

Those units are creating requisitions, managing requisitions throughout approvals in

April and receipt.
The first unit we will cover the steps to create a requisition in the fluid user interface.
Three steps in the process of creating our acquisition are entering our acquisition default, adding items to the cart and reviewing and submitting.
Here's a new look of the brand new fluid interface. On this screen, we see the Corsetti financials module tiles.
Clicking the E procurement tile gives user access to those actions that their security allows.
Highlighted on the screen are the tiles.
Who will be reviewing today?
Plan to use April.
We use April requisitions when ordering items from the state catalog when buying office supplies from a punch out supplier. When there is a need for a special request, which is an item not in the catalog, or when submitting, a more specialized requisition such those listed at the bottom.
Of the screen.
Navigation to Clearwater.
Homepage. From there you will select core City financials from the drop down menu, then click the IBRC human tile and then the create requisition tile.
That navigation will land you here on the requisition defaults page, formerly known as define requisition.
Here you enter the header line, shipping and distribution values that affect the entire requisition.
If you have access to multiple business units, you will have to select the correct BU for the work you are creating.
Under Rec name you can enter the value as your agency decides the rec will be identified.
Failing to enter our red name will populate the wreck ID as direct name. Upon submitting the requisition.
A red type must be determined at this time. Once the work is submitted, the rectite cannot be changed. Excuse me.
There is no need to enter supplier information or account code for catalog and punch out orders.
Those values populate from the supplied items added to the cart. If the requester is not the buyer assigned to the requisition, a buyer must be entered on his page also.

Regular childhood are now divided into 3 tabs as childhood 1-2 and three.
The Details tab is used for imagery of positions as usual, as well as the asset management tab, which is used to enter asset information.
The default options have been removed from this page, and that action is now handled via the Mask Change link, which we will cover later in the train.
It is important to select the correct requisition type at this stage. Once a requisition is submitted, the rectified cannot be changed on the left. You will find at least a list of job aids for the different requisition types.
They can be accessed on the corset team modernization website as they become available.
This is a summary of our rec types under definitions. This deck will be posted on the courses team page after the training for your reference.
Upon selecting each red type, a distinct hyperlink populate underneath it.
Clicking it will open to custom pages that require your input.
On this example.
Direct type is requisition.
And the hyper link that populate is application amount which will open a page that needs to be completed. As a reminder, if the requester is not the buyer assigned to the requisition, a buyer must be entered on the regist to avoid issues with sourcing the red to a.
Purchase order.
As previously stated, the distribution default sections is now divided into 5 tabs to allow for a better appearance on mobile device.
Tracfuse 1-2 and three display the regular char field field as shown on the screen.
The Details tab is for inventory items and the asset Information tab is to enter the asset management values.
You can also click show all to display all values on the same page.
Once finished entering the registers, you will click done which brings you to this page where you will select an option from the left depending on the requisition you are creating. These are the same options we have available today in the classic version of April.
Analog search when you click catalog you will be taken to the advanced search page where you can enter the keyword into this a keyword in the description to bring up results upon clicking search.
Oracle has removed this section to search the.

By contact ID.
But we are actively working on adding it again, which will possibly happen shortly after colaid if not right before.
In the meantime, you have plenty of fields to narrow or expand your search criteria.
Until we get that section back on the page.
To search by the by the complete CM number or item ID, ensure the operant is set to equal and not contains any. We are working on having that operant default as equal.
Another workaround is to enter the last set of digits for the item ID in between percent sign wild card.
This is the advanced storage page with the keyword pads enter in the description field.
It displays a set of result of all catal items containing the word pad and the description.
The left panel displays filters where a single supplier can be selected to show all results for that supplier only.
We highly recommend using this filter to avoid multiple pills creating from the same requisition.
Take the arrow to view item details and click add to cart to include items in the shopping cart.
Remember to follow the policy of one supplier, one buyer and one requisition to purchase order.
Catal item details the item details page include a long description of the item which can determine whether you chose the correct item on your record.
The item ID represents the catalogue management number.
To the desired quantity. Then click the add button to include items in your shopping cart with the new persistent cart functionality, you can add items to your cart and return later to complete your purchase.
This is a new feature that can be very useful during crunch times when priority shipped quickly.
For any questions about contract pricing in the catalogue, you may contact the contract specialist at the AS procurement.
Web suppliers to purchase office supplies navigate to web suppliers and then select one of the punch out options.
You will then be directed to their site where you can search for items and add them to your cart.

If you notice the web suppliers option is not available missing from the page.
That means there are items in the cart from a previous session.
Check your cart and empty it for the web services option to become available for selection again.
We can continue to check out on WB Mason's site or submit CART on suburban's redirects you to the fluid. Check out page to submit their requisition for approval.
For special request, click the special request option to add items not in the state catalog. Use this page to describe and include goods in the requisition.
Some fields are required and they are identified with asterisks.
Others populate from the right default. You can choose to share additional information.
By typing in the common text section, which you can make visible on the PO, the receipt or the voucher pages by talking those flash.
It's called service.
Use this option if you know the cost of the service and the requisition.
For example, repairing an electrical panel will cost $1500.
Use the time and materials option for requisitions where there will be services as well as materials, including for instance, a $75 part is needed to repair a water heater in four hours at $50.00 an hour.
Use the variable cost service when the time required to complete the repair or service is unknown and no materials are needed. For example, troubleshooting computer issues at $125 per hour and you don't know how long it will take.
The template option is used to create and manage templates to order popular items.
The price of template items updates with each catalog revision.
The favorite option is selected to create, group and manage favorites.
The price of favorites?
Also updates with each catalog revision.
Both templates and favorites hijab AIDS to perform those tasks and they can be accessed on the course team modernization page as they become published.
Take the shopping cart icon for an overview of your cart.
The cart remains active updating as you add items.
Take advantage of the persistent cart feature to store your progress in between sessions and return later to complete and save or submit your order.
Even if the CART icon shows a zero, we recommend to always click on the icon to check for any unneeded items left from a previous session or requisition.

This is this. This is a known or known Oracle bug that happened.
Radically, and we're working with them to get a resolution.
Selected check out button to display the reposition detail.
On the checkout page you have the option to review all details on all sections of your requisition for accuracy before submitting it for approval.
The line details page will display the values of the line item.
Here you can indicate whether the records for goods or services. See any additional information on the line supplier and manufacturer information if available, and purchasing authority of the line.
Purchasing Authority, fault of contracts and it is up to the user to change it accordingly.
A purchasing authority of contracts requires a contract ID, except for DAS bids and POS or PSA rec type, where the contract with the contract ID could be left blank.
Let the schedule details tab to access detailed shipping information. This section is used to manage and track the delivery of acquisition line items such as date quantities and shifting locations for the goods or services.
The schedule details also provides access to the distribution chart here.
Funding access the distribution section on the schedule, details tab and click the plus sign on the right to add another distribution for the line.
Add or replace the chart field values accordingly and the added lines and allocate the percentages for each line appropriately.
All distribution lines and Direct Line must add up to 100%.
As mentioned earlier, the default options box has been removed from the requisition defaults page in. This functionality is now handled here via the mass change action.
The load values from default button populate values from the requisition. Default changes made to fields and the mass change page will override the requisition default.
Edit multiple lines in our acquisition, 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.
And the mass change page.
Click the load values from default button to review the current char fields from the red defaults page.
Edit the field as needed and click the done button when finished.

Pop up window will appear asking if you want to retrofit field changes to the Selective acquisition lines and schedule not already sourced to PO. You click OK to do so.
The line comment icon to open the line, comments and attachments for a specific line.
Enter the additional info in the comment text box.
Line comments can be directed to the supplier and will display on the purchase order receiving pages or batching voucher pages accordingly when the appropriate flags are checked.
Users can also add attachments that allow requesters to communicate supplemental information and requirements to suppliers, approvers and other courses to users.
These comments are always tied to the requisition use the ad attachment button to include supporting documentation with the requisition. The process is intuitive, but the steps are.
On the screen and on the job aid, which can be accessed on a 4C team modernization site.
Even submit.
We currently have two buttons.
One is stay for later and the other one is stay and submit. Today our our with the outbreak we will have two buttons also.
One is the save button and the other one is the submit button.
The save button, save the requisition and assigns a sensor direct ID but will not initiate approvals workflow.
The submit button will say the requisition start the approval's workflow.
And generate a confirmation page.
The confirmation page displays a summary of the position, a link to view printable version, a link to review the approvals.
Want to edit direct want to access the my requisitions page and want to create a new requisition.
The points of creating a rack.
The three steps to create a requisition are completing the red default, adding items to the card and reviewing submitting for approval.
Takeaways.
Comments can be sent to the vendor with the purchase order or displayed on the receipt and or the voucher.

Attachments can be included and sent to the supplier with purchase orders that are dispatched via e-mail.
The confirmation page provides a summary of the rec and confirms it has been successfully submitted.
And you can save requisition lines as favorite annual templates. Funding can be split and distributions can be assigned accordingly.
The next two slides contain a list of job aids associated with creating a requisition.
You should be able to access those job materials website as they become published.
I will take any questions you asked in the chat regarding our first unit. Shannon, will you kindly share the first question?

Reutter, Shanon M 22:03
We have no questions at this time.

Bello-Persson, Maty 22:03
Sorry, no questions regarding the first unit, OK.
Well, in that case, let's move on to Unit 2.
Manage requisition.
In this unit, we will explore how to manage existing requisitions, perform key tasks using the fluid interface, and discuss navigation changes.
You will familiarize yourself with managing requisitions actions.
Learn how to find, edit, and update requisitions as needed.
And understand how to navigate the updated interface for a more streamlined experience.

Reutter, Shanon M 22:46
Maddie, I'm gonna stop you right there. Just because we have one quick question.

Bello-Persson, Maty 22:50
OK, sure.

Reutter, Shanon M 22:51
It says can we split code by amount only?

Bello-Persson, Maty 22:58

I believe so.

Yeah, you have.

I believe that if you go on the line, I believe there are two options and one is by amount and the other one by quantity.


Richmond, Michele 23:09

Yes, that's correct.


Reutter, Shanon M 23:13

OK, we'll continue.


Bello-Persson, Maty 23:19

The navigation to manage your positions. You will start on the employees of Service homepage and select core City financials from the drop down.

Then click the e-book men tile and then click the manage your positions tile.

Management style opens to the my requisitions page, which displays a list of requisitions created by the user in the last seven days in all statuses by by complete filters can be adjusted to expand or narrow the search results accordingly.

Searching the by budget status equal error will bring up Rex in budget error.

Did the action drop down list on the left to see the available options for a particular acquisition?

The actions that display are detailed.

Copy View, print, cancel, edit and view approvals and they will display according to your security rules.

Selecting the details action will bring up the rec summary.

Direct lifeline that shows where the IS in the process and the list of reclines.

Copy feature will create a new requisition based on the previous order saving time by replicating all the lines data. Users can then modify the new rec accordingly.

The rec type will be full to requisition and the new rec and will need to be updated as required as well as the new red tag related custom pages.

Please note that punch out requisitions cannot be copied.

As if usual, the viewpoint selection will provide a printable view of the rec and you will be prompted to select whether you'd like to see the distribution.

As a reminder, the state of Connecticut has adopted eco friendly policies and discourages sprinting and we recommend electronic review.

But the option to print is available.
The Council selection lets you cancel our proposition. If you have the proper security role.
The process is very intuitive and short.
Edit use this requisition to modify a wreck.
You will be prompted with a message advising that the approval workflow might be reinitiated.
Click OK, then click check out to make your changes.
Better the red click, either the red default link or the schedule details line details pages accordingly.
The approval chain allows you to see the different workflow approvers and levels and it shows you where the work is in the approval process.
Key points of manage Rex.
To review the my requisitions page shows you a list of Recs created by the user in the last seven days in all statuses but complete.
Or a list of search results by adjusting the filters, you can perform different actions on each rec according to your security goals, and those actions are listed on the screen.
So here's a list of Job 8 pertaining to this unit, which will be published on the four city Marinasation site.
And at this point I will take any questions on Unit 2.

Reutter, Shanon M 27:45
There are none in the chat at this time.

Bello-Persson, Maty 27:48
Thank you.
So in that case, let's move on to Unit 3.
Unit 3 covers approval.
We will cover the streamline floor approvals process in KITABIT would include navigating the fluid approvals interface, understanding the approval statuses and managing and tracking approvals effectively.
Navigation for approval starts on the first city financial option of the homepage.
Click the procurement tile and then the approval's time.
Provers can efficiently review acquisitions.
New all relevant details and access approval options directly from the approvals

page.
As for the integrated workflow, the approvals process is seamlessly integrated with the overall requisition lifecycle.
Cycle. This ensures that all necessary documentation and compliance steps are completed by prior to approval.
Throughout this session, we will explore how to navigate the approval screen and process approval actions efficiently.
Streamline process enhances visibility for approvers and ensures compliance with the state's procurement policy.
In Singapore, the approval style will open to this age.
Here the approver can see all the pending financial transaction approvals according to their security. The counts for each module. In this case Rex and POS and a total count. Clicking on a transaction will open its details from the Approver's perspective.
And their requisition approval page, the approval has the options shown.
View approval change approval line details view printable version Edit, requisition, approve, deny and more, which opens to options for push back, hold and request information.
Taking the approval chain.
Displays the various steps in the approval process along with the current approval status. Clicking the multiple APPROVERS links will display the users on that approval level.
Approval line detail selecting a red line displays the approval line detail page which shows the line details and shipping information for the line. Clicking on the schedule line and the shipping information shows the distribution detail.
View printable version.
This option is self-explanatory and a message will display asking whether you like the distribution changes populated on the output and as a reminder, we recommend to review this information electronically to comply with the state's green policies. But the option to print is the value.
Taking out of a position opens the editor position page, allowing the approver to make changes to the requisition. Upon clicking check out.
The arrow opens the schedule details and line details on the same page as two separate tabs. The schedule details allows you to see the distribution.
Poop once reviewed for accuracy, the approver can click approve. This will prompt a comments box.

The comments are optional for the approved action.
Clicking submit will approve the requisition.
It will then drop for that level of approvals and show up on the next level.
Taking the night prompts the user to enter approver comments before clicking submit to deny their requests.
Comments are required for deny the request to receives an alert notification and the requisition is terminated.
Making more displays additional options including push back, hold and request information.
Comments are required for these functions.
There are related job aids at the bottom of the slide, which can be accessed on the modernization website as they become available.
And this is a list of adage related to the approval unit, which can be accessed on the modernization page once they are published.
If anybody has questions on the approvals section, I will take them now.

Reutter, Shanon M 33:16
There is one. Will there be an opportunity to test in a sandbox environment prior to go live?

Bello-Persson, Maty 33:23
No, unfortunately there is no send box.
We had and we've been communicating with all agencies and a lot of them provided users for UAT environment.
Fortunately, that's face already happened and there's no more testing than a test environment.
There's no more practicing.

Reutter, Shanon M 33:47
There are no more questions.

Bello-Persson, Maty 33:49
OK.
Thank you.
So in that case, let's move on to uniform receipts.

In this unit, we'll review creating and managing receipts using the new Fluid user interface, highlighting some navigation changes.
Receipts are required for all purchased orders, whether for goods or services.
Receiving can be done in both purchasing and procurement modules.
The appeal must be dispatched and the user needs the general receiver or casual receivable to receive cash.
Receivers are limited to only receiving POS. The stores from requisitions.
They created.
Navigation to what?
Update receipts from the employee self-service homepage.
Select the query financial option.
Click the E procurement tile, and then click the add update receipt style.
On this page you have the options to add a new receipt and update an existing one to add a new receipt, you click the add new receipt link.
To update a receipt, search the PO you wish to receive, making sure the ship to value is accurate or delete it so you can see all lines.
On managed receipts, click the details icon to access the receiving page.
Once you click the add new receipt hyperlink, ensure the right business unit is populated and the PO receipt box is checked. The receipt ID value is system generated.
You can just click add.
Here the user enters the search criteria values to locate the PO and receive its required lines.
On the receiving page, the user enters values such as receive quantities and shipping details as applicable. Users may also need to update information like date and location of delivery.
Save to complete the process and generate the receive the receipt in the system.
The receipt date is the date the items were received and not the date the receipt is created in core receipt dates value must be edited as appropriate.
Find an existing receipt.
Enter the receipt number or sufficient information on the search criteria, and then click search.
Review the search result and select the relevant receipt to view or update by clicking on it. Then click the details icon to access the receipt.
Navigation to my receipts.

You select the quantity financial option from the employee self-service homepage, then click the procurement tile and then click the my receipt style.
On the my receipt page, the user can view active receipts.
They have created the search criteria, filters can be adjusted to expand the result.
Users can perform several actions such as view details, deliver information and others by clicking on the icons.
Please note that some icons are displayed but are currently disabled.
And they maintain activity in comments page you can track activity history and outcomes.
And deliver information page.
There are two tabs, delivery location and location comments.
The user can add or update delivery or location information as needed.
Working on the error receipt, I can direct the user to the add update receipts page where they can make modifications to the selected receipt.
Need to recap, this unit receiving is required for all purchase orders.
A receipt is created to accept items or services.
Receipt optimal comments.
I'm sorry, I'm sorry.
Optional comments can be entered.
The receipt is then saved and the payment process continues in the accounts payable module. The PREREQS to receive are that the Associated PO must be dispatched.
And the user must have either the casual receiver or the general receiver role.
The receipt date is the day the items were received and not the day the receipt is created in four. Remember the receipt date value must be edited as appropriate.
OK, so to wrap things up, according to our training goals, you now have knowledge on how to create a Recon fluid, how to manage existing requisitions.
You have a handle on REC approvals and can create a managed receipt according to your security.
Shannon, do we have any questions?

Reutter, Shanon M 40:05
Yes, paper reduction has been cited during this presentation.
Has OSCAPD been consulted on their expectations for paperless transactions for audits?

Bello-Persson, Maty 40:18

I'll have to get back to you on that, but that's known.

That's a known statewide policy.

Paperless week paper reduction.

Reutter, Shanon M 40:32

OK.

There's no more at this.

Bello-Persson, Maty 40:39

In that case.

Let's go over these. Who's training?

Follow up, we encourage everyone to log a footprints ticket.

It is the fastest way to get your issue addressed.

Keep an eye out for emails when you have a ticket open as the help desk will communicate through the ticket.

You can respond to the e-mail from footprints. So footprints attaches the e-mail to the ticket and notifies the help desk that you have responded.

That is the process.

Tickets are routed directly to the team that handles the module for faster processing.

If you are in the need of footprints access, please e-mail the readiness mailbox entering footprint access in the subject.

If your e-mail domainisct.gov you have access to full time. If you have an e-mail that address that does not end in ct.gov, you can e-mail the readiness mailbox for the help desk to create a footprint sticker on your behalf.

Please watch for emails from footprints, even though you don't have footprints access.

And you can still respond to the e-mail as the e-mail will attach to the ticket, and we'll also notify the help desk that you have responding.

Please, please refrain from reaching out to the manager leads to report issues. We need to document every issue that comes in and every resolution, and that process is done via the help desk via footprints.

Congratulations. Since that you have successfully completed the procurement fluid user interface course.

Kindly take a moment to complete the training eval that will be posted on the chat. We really appreciate your input on this and as previously mentioned, the course material will be available for reference and will be posted in the chat.
Or in the caucus tab, Noronisation page for additional information.
Trainings. Please visit the courses site.
We thank you very much for your participation today and wish you a good rest of your day.

◉ **Reutter, Shanon M** stopped transcription