Transcript for the State of Connecticut Office of the State Comptroller

Core-CT eProcurement Navigation Course.

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Welcome to the Financials eProcurement training for Core-CT.

Click Next to proceed.

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Core-CT eProcurement Navigation Course.

e-Learning Navigation Tips.

On the bottom of your screen is the navigation section for the course.

Notice the arrow labeled Previous.

This allows you to navigate backward through the pages of your course.

The Table of Contents button is present on each page, offering the option to navigate to a specific topic or section within this course.

The arrow labeled Next will advance you to the next slide.

Buttons on the play bar include Play.

You can also use the Play button to pause the course.

Use these buttons to move to the Next or Previous slide.

This button will Mute the narration,

And this button will close the course.

Let’s get started.

Click Next to proceed.

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Training Objectives.

This training module will introduce new features and provide step by step walkthroughs on the new fluid user interface.

Click Next to proceed.

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eProcurement Overview.

Designed to streamline workflow and enhance productivity.

Easy to move between pages and menus.

Simplified eProcurement functionalities.

Click Next to proceed.

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Table of Contents.

The topics covered in this training are listed here with their corresponding page number.

During this session you can return to the Table of Contents at any time by clicking the Table of Contents Button at the bottom of the page.

While on this page, a preferred title can be selected, and you will be redirected to that topic.

Throughout this training, you will find key navigation techniques and opportunities to test your understanding of what you learn to help you familiarize yourself with the new UI.

Let's begin exploring eProcurement.

Click Next to proceed.

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Goals.

At the completion of this training, you will have the knowledge to understand the changes to the fluid user interface, identify fluid terms, and navigate eProcurement functions.

Click Next to proceed.

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The Key Changes are a redesign of the Core-CT homepage, implementation of tile functions, and access to fluid approvals and notifications.

Click Next to proceed.

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Employee Portal Log In.

To access the employee portal login, you must log in through Core-CT.

When logging in, Core-CT alerts you if there is a current system lockout.

You are automatically defaulted to the homepage based on your role.

Click Next to proceed.

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Homepage: Employee Self-Service.

Now that you're logged into the portal, a role-based self-service homepage displays.

Here are homepages, role-based information, and display tiles giving actionable information as well as navigation to fluid applications

Click Next to proceed.

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Homepage Navigator and Drop-down Menu: Role-Based.

The home page drop-down menu, or homepage navigator, helps navigate between homepages.

Depending on the user's role, multiple homepages will be available.

Selecting Core-CT Financials brings up the financials homepage.

Click Next to proceed.

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Core-CT Financials Homepage.

The financials homepage shows tiles based on the user's roles.

Click Next to proceed.

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eProcurement Page.

Within the updated fluid UI, the eProcurement page offers tiles for direct access to functions, such as, Approvals, Create Requisitions, Manage Requisitions, My Receipts, Add/Update Receipts, Requisition Account Entries, Convert Req to Contract, Requesters Workbench, and Sourcing Workbench.

Click Next to proceed.

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eProcurement Page.

Click the Create Requisition tile to navigate to the Create Requisition page.

Click Next to proceed.

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If the user has access to multiple business units, and/or has the security to enter requisitions for other requesters, clicking the Create Requisition tile directs the user to the Default Entry page, where those values can be entered; otherwise, clicking the Create Requisition tile will open the Requisition Defaults page.

Click Next to proceed.

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Requisition Defaults.

The Requisition Defaults page has four sections: Header, Line, Shipping, and Distribution Defaults.

Note that the Default Options section, (the radio buttons formerly located between the Header and the Line Defaults sections) have been removed from the Requisition Defaults. That functionality is now applied using the Mass Change Link, which is discussed in the L200 – eProcurement Instructor Led Training.

Click Next to proceed.

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Requisition Defaults.

In the header defaults section of the Requisition Defaults page, it is important to select the correct requisition type, once a requisition is saved, the requisition type cannot be changed.

Also depending on the requisition type chosen, a hyperlink displays under the selection, and it opens to custom pages that also require input.

Click Next to proceed.

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Create Requisition Page.

On the Create Requisition Page, users can access Requisition Defaults, create a requisition using Catalog Selections, Special Requests, and more.

These items can be Added to the Shopping Cart.

With the new Persistent Cart feature, users can leave items in the cart, and return later to complete the requisition.

Click Next to proceed.

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eProcurement Page.

Click the Manage Requisitions tile to navigate to the My Requisitions page.

Click Next to proceed.

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My Requisitions.

Clicking the Manage Requisitions tile brings the user to the My Requisitions page.

The user can view details, copy, print, cancel, edit requisitions, and view the approval chain of a requisition.

Click Next to proceed.

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Requisition Details.

Clicking requisition details, brings the user to the Requisition Details page.

This page displays a summary of the requisition, where it is in its lifeline and the line items of the requisition.

Click Next to proceed.

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eProcurement Page.

Click the Add/Update Receipts tile to navigate to the Manage Receipts page.

Click Next to proceed.

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Manage Receipts.

Clicking the Add/Update Receipts tile brings the user to the Manage Receipts page.

To receive in the eProcurement module, the user is required to have the Casual Receiver or General Receiver role.

The Casual Receiver can only receive PO Lines that originated from requisitions they created.

Click Add New Receipt to get to the Receiving page

Click Next to proceed.

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On the Receiving page, to add a new value, ensure the proper Business Unit is selected, check the PO receipt box, and click add.

The receipt number is auto generated, the user does not need to enter it.

Click Next to proceed.

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Add/Update Receipts.

The Add/Update Receipts page is still in classic format.

Here the user enters information into the search criteria fields to search for, and update, an existing receipt, or click OK to add a new receipt.

Click Next to proceed.

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Add/Update Receipts.

Clicking the Find an Existing Value option on the Receiving page brings up the search criteria for searching for an existing receipt.

Click Next to proceed.

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Add/Update Receipts.

Searching for an existing value brings up a list of existing receipts.

Click Next to proceed.

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On the Add/Update Receipts page the user adds to, or updates, existing receipts accessed through the existing value list.

Click Next to proceed.

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eProcurement Page.

Click the My Receipts tile to navigate to the My Receipts page.

Click Next to proceed.

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My Receipts.

On this page, the user sees active receipts they have created.

The search criteria filters can adjust the results depending on user security.

The user has the option to click Activities, Delivery Information, Chart Fields, and/or Edit Receipts.

Note: The Manual Close Landed Cost icon is still displayed but is currently not an active function.

Click Next to proceed.

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My Receipts.

On the Maintain Activity and Comments page, the user has the ability to add or subtract activities to a receipt.

Click Next to proceed.

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My Receipts.

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 tab.

Click Save.

Click Next to proceed.

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My Receipts.

Under the Location Comments tab, the user adds comments about the delivery location.

Click save.

Click next to proceed.

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Knowledge Check.

Read the following statement, then decide if it's true or false.

Click the submit button to check your answer.

When you are finished, click Next to proceed.

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Knowledge Check.

Read the following statement, then decide if it's true or false.

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[Page 35]

Knowledge Check.

Read the following statement, then decide if it's true or false.

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Knowledge Check.

Read the following statement, then decide if it's true or false.

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When you are finished, click Next to proceed.

[Page 37]

Knowledge Check.

Read the following statement, then decide if it's true or false.

Click the submit button to check your answer.

When you are finished, click Next to proceed.

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Congratulations on completing the Core-CT FIN eProcurement training course. We covered how to navigate the eProcurement functions and the new fluid user interface. Your dedication to mastering these tools will greatly enhance your ability to support our organization, and its employees. Thank you and have a great day!

[End of Transcript]