Pre-Exercise: Logging Into Core – CT

Purpose

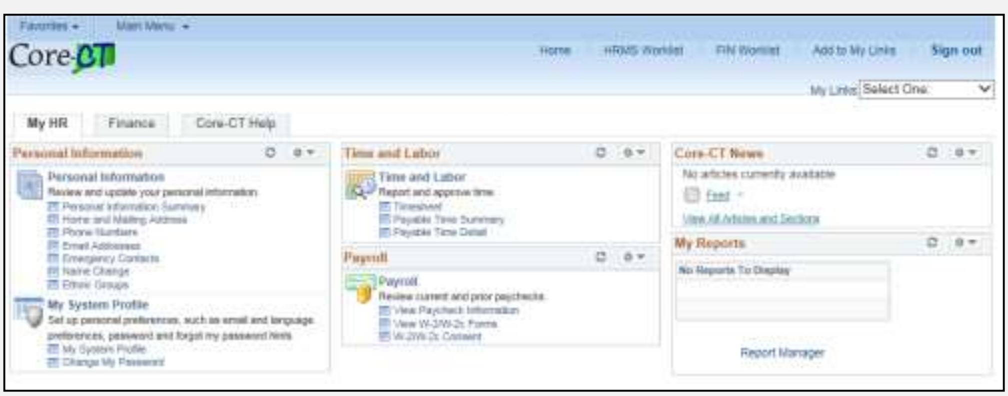
This exercise describes the steps for logging into Core – CT. The following are step-by-step instructions that will guide you through this activity.

Procedure

Step 1: Log into the PE92TRN training environment using the training **User ID** and **Password** provided to you.

Click **Sign In**.

The **Portal** page is displayed.



You have successfully completed the steps to logging Into Core-CT.

Exercise 1: Create a Requisition Using the Catalog

Purpose

This exercise describes the steps to create a requisition using the catalog feature. The following are step-by-step instructions that will guide you through this activity.

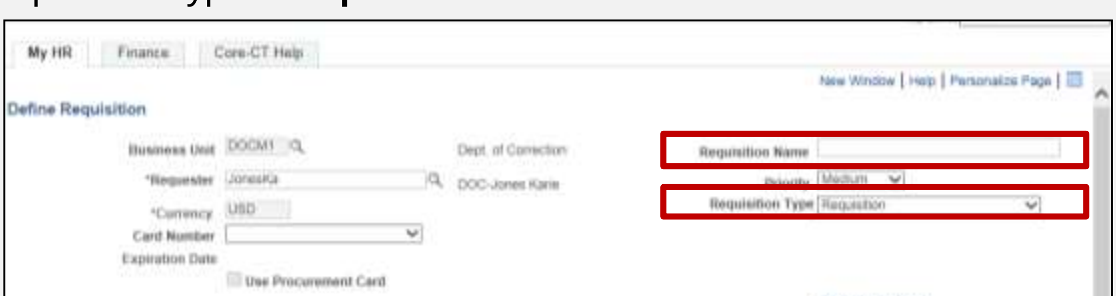
Procedure

Step 1: From the Portal page, navigate to ***Main Menu > Core-CT Financials > eProcurement > Requisition.***

The **Define Requisition** page is displayed.

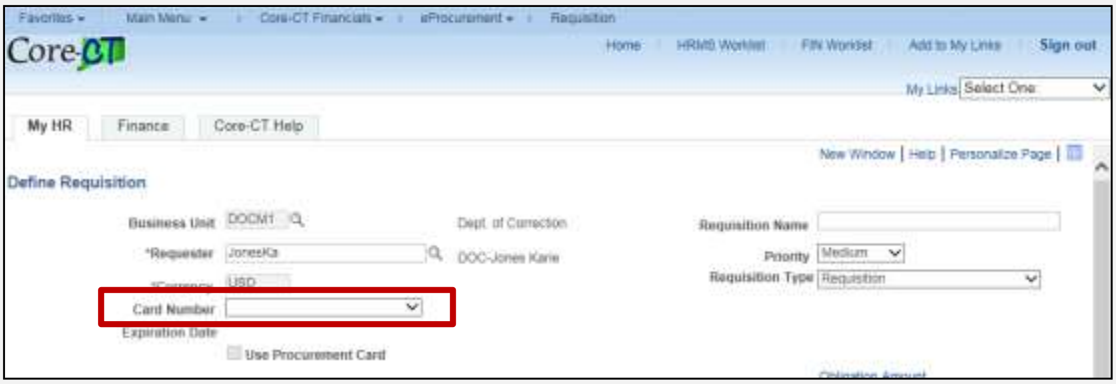
Step 2: Enter the header information for the requisition in the **Define Requisition** section:

- Requisition Name – **Band-Aids for 8th Floor**
- Requisition Type - **Requisition**



Procedure

Step 3: Select the P-Card ending in **4444 (MC)** from the **Card Number** dropdown.



Step 4: Enter the line and shipping information for the requisition in the **Line Defaults** and **Shipping Defaults** section.

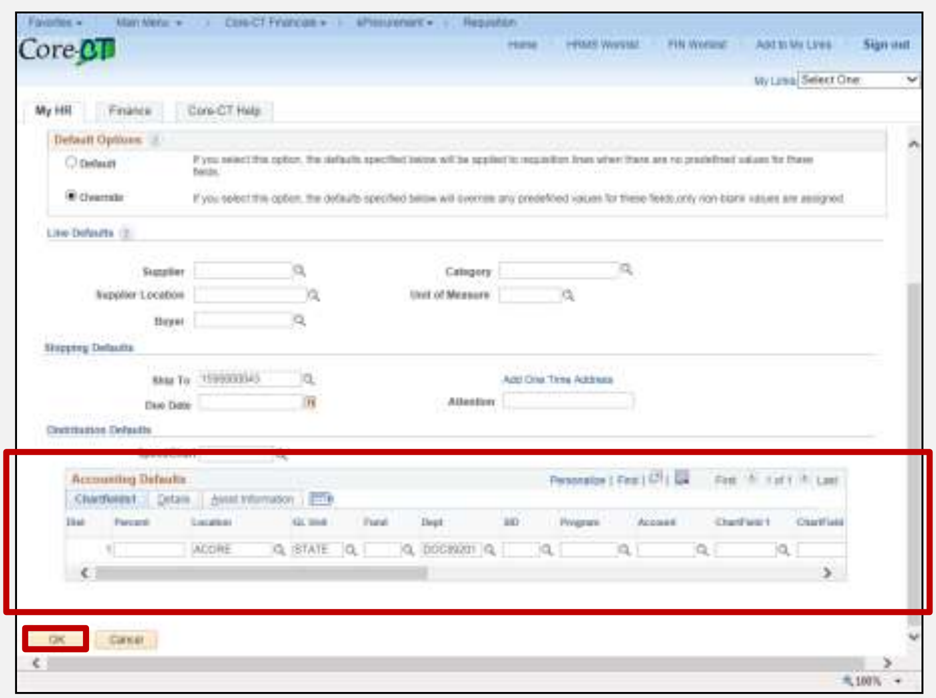
- Buyer - **JonesKa**

Procedure

Step 5: Enter the distribution information for the requisition in the **Distribution Default** section.

- Fund - **11000**
- SID - **10020**
- Program - **00000**
- Account Code - **54060**
- PC Business Unit - **NONPC**
- Project - **DOC_NONPROJECT**

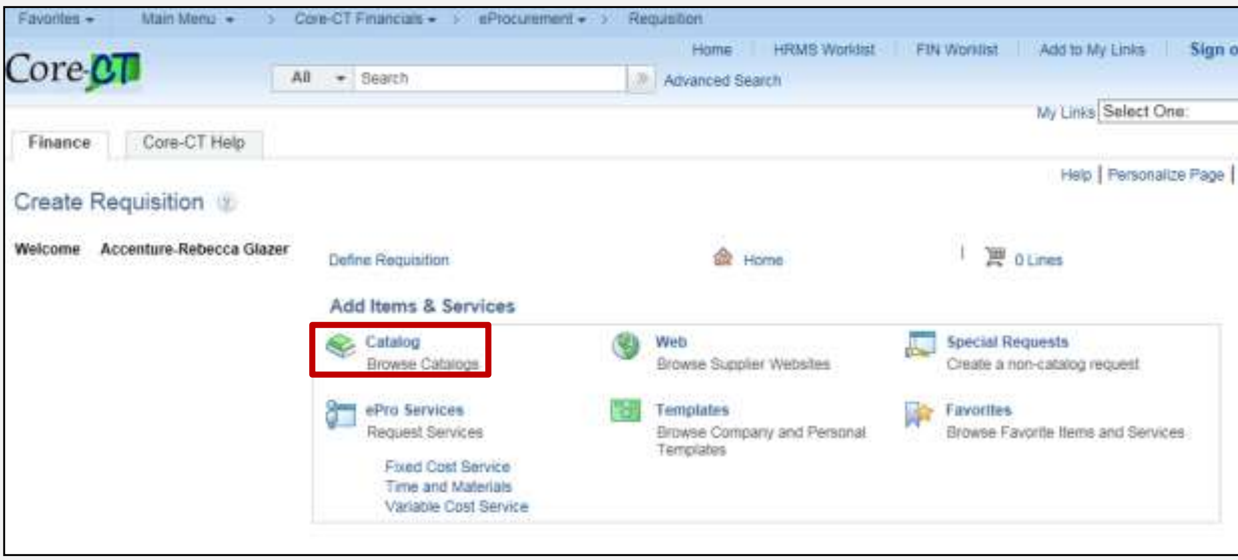
Click the **OK** button.



Procedure

Step 6: The **Create Requisition** page is displayed.

Click the **Catalog** link in the **Add Items & Services** section.

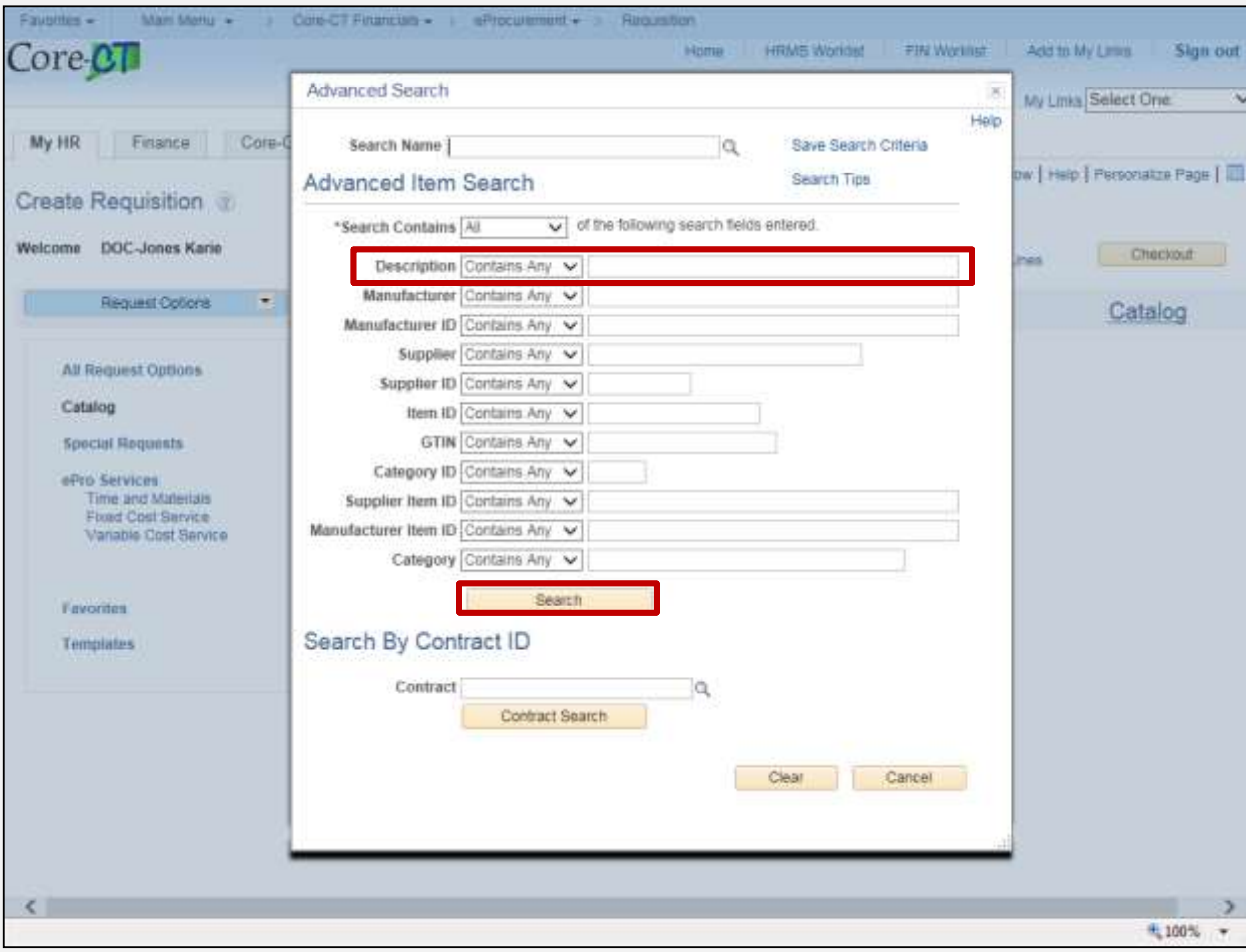


Step 7: Click the **Catalog** link in the upper right hand corner of the screen.

Procedure

Step 8: Use the **Advanced Item Search** feature to search for an item.

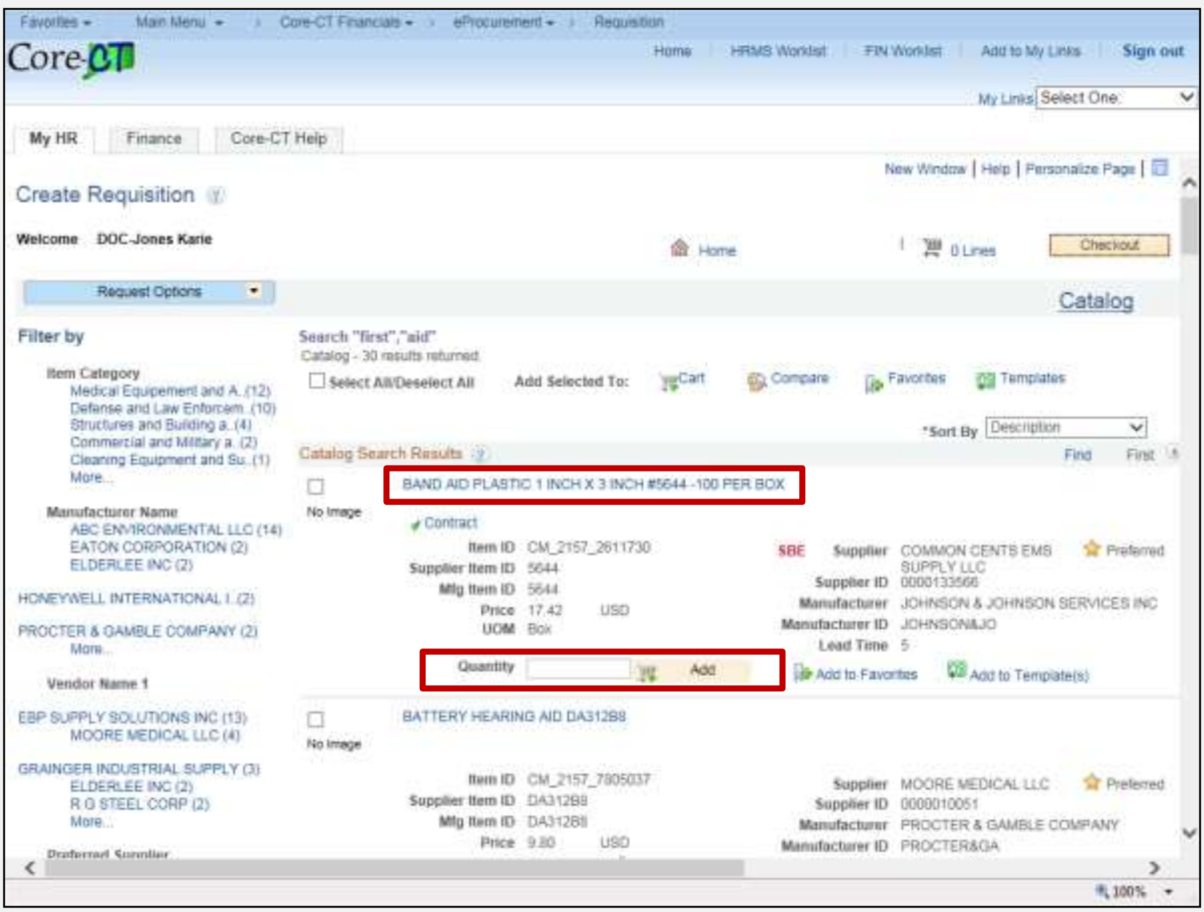
- In the Description field enter **First Aid**.
- Click the **Search** button.



Procedure

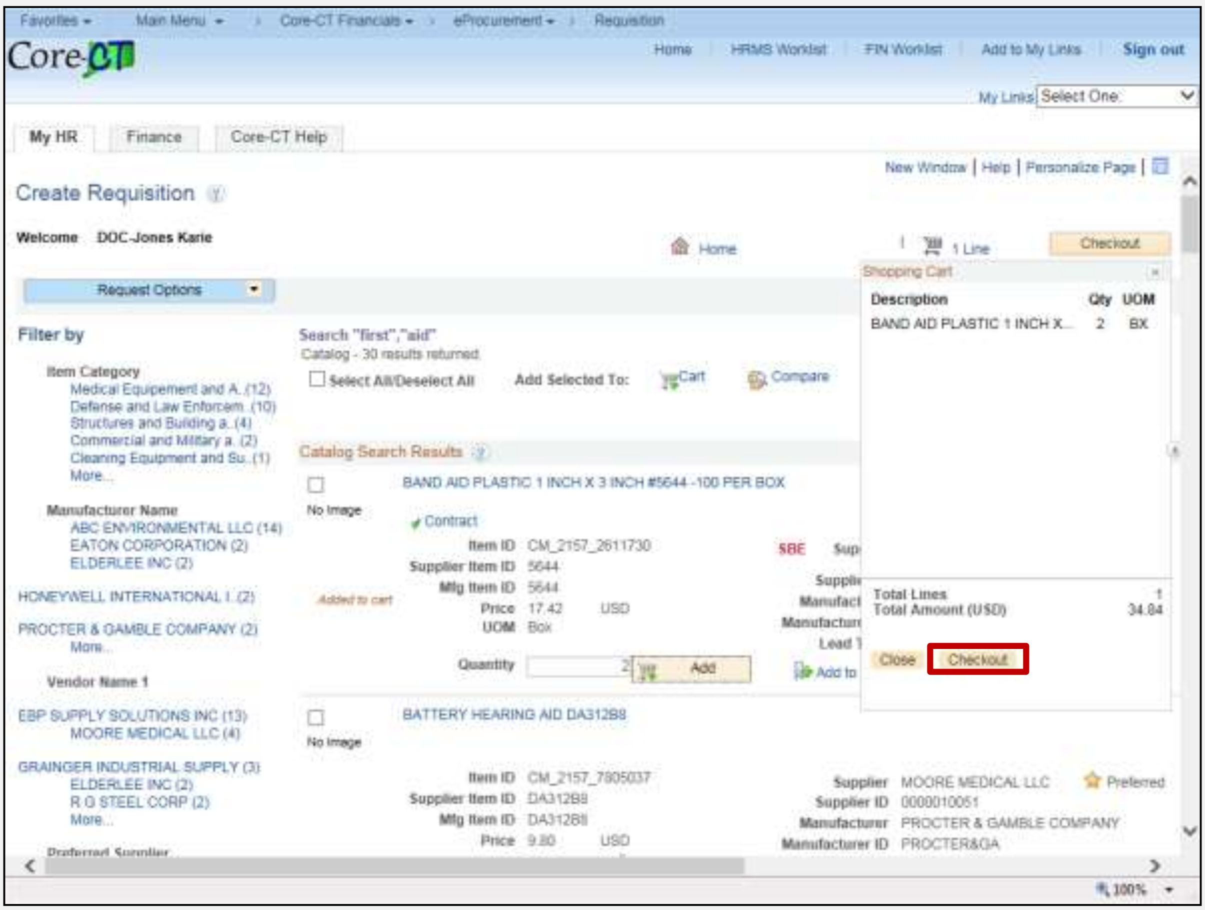
Step 9: The search results display **Band Aid Plastic 1 INCH X 3 INCH #5644**.

- Enter **2** in the item's **Quantity** field.
- Click the item's **Add** button.



Procedure

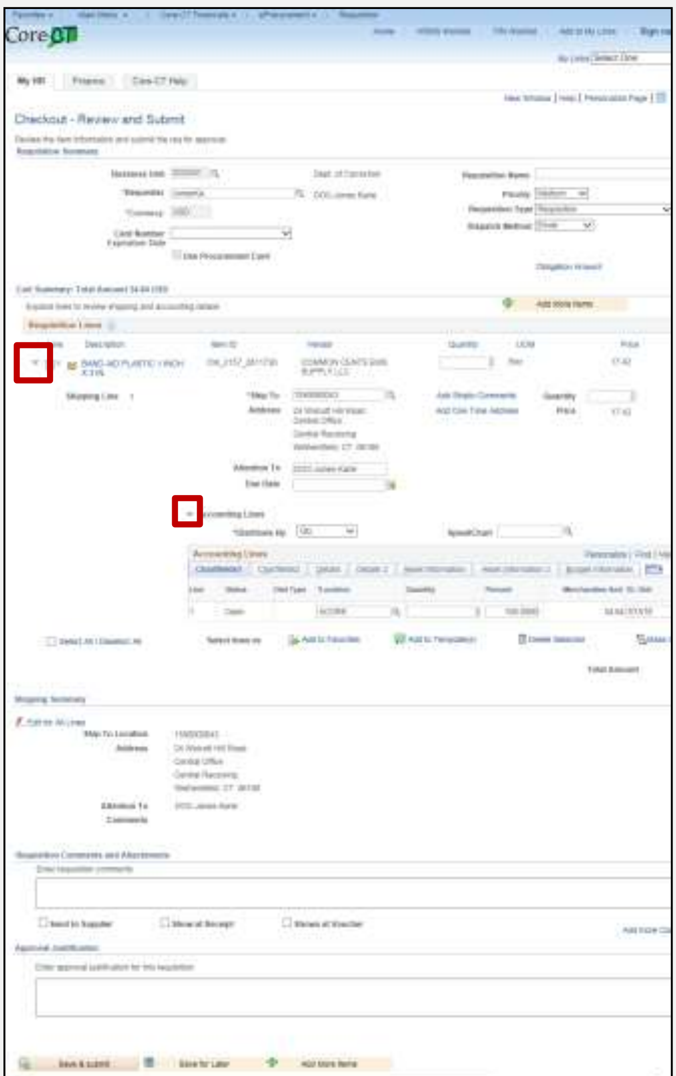
Step 10: Click the **Checkout** button.



Procedure

Step 11: The **Checkout – Review and Submit** page is displayed.

Use the dropdown arrows to review the Line, Shipping, and Accounting information for each item in the **Requisition Line** section.

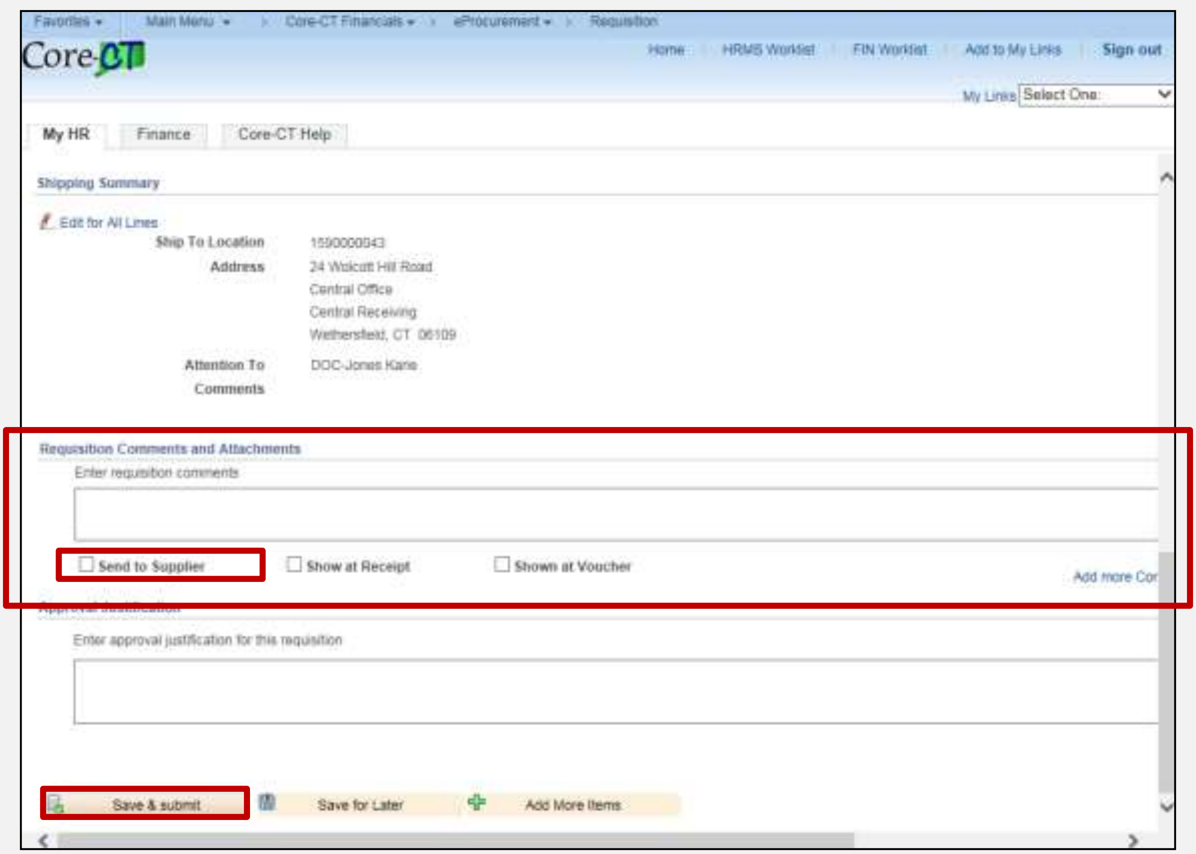


Procedure

Step 12: Enter "**This has been approved by the warden.**" into the **Requisition Comments and Attachments** field.

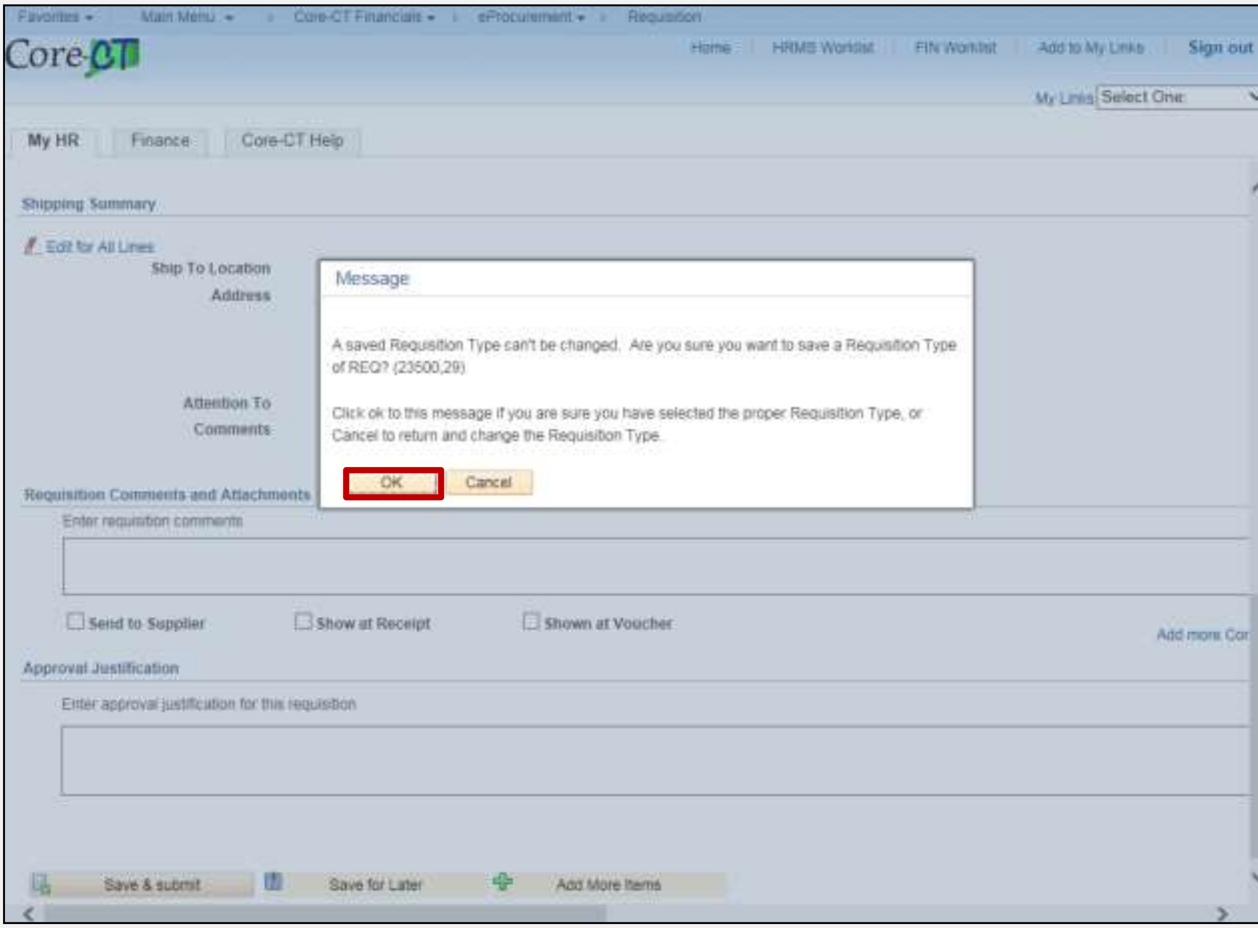
Select the **Send to Supplier** Checkbox.

Click the **Save & submit** button.



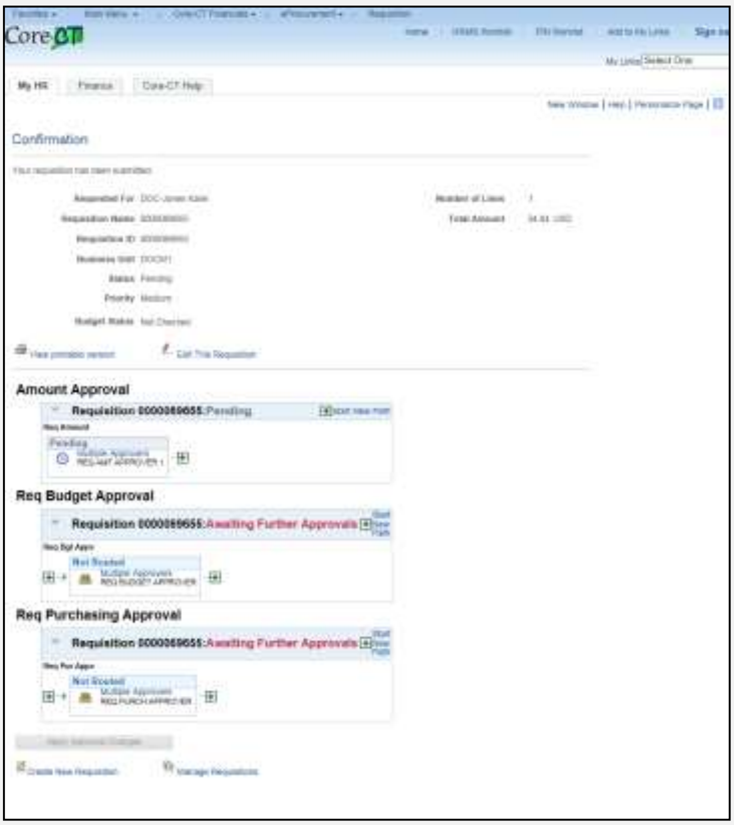
Procedure

Step 13: Click **OK** if the correct Requisition Type has been selected.



Procedure

Step 14: The **Confirmation** page is displayed and can be used to identify the Requisition Approvers.



You have successfully completed the steps to creating a requisition using the catalog

Exercise 2: Creating a Requisition Using the WEB (Punch-Out) Feature

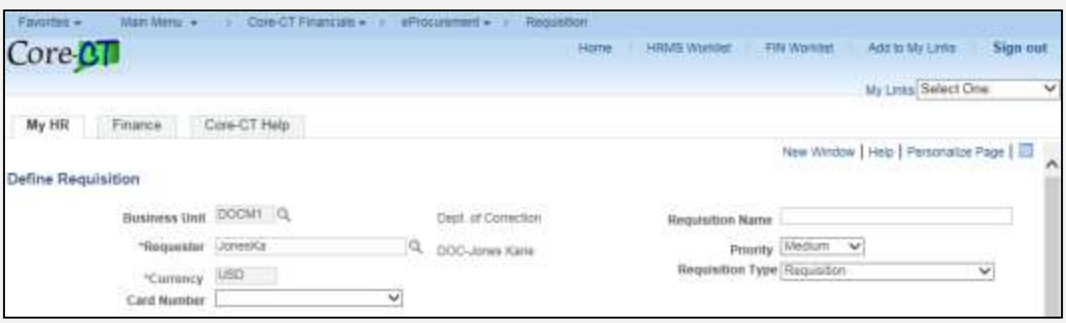
Purpose

This exercise describes the steps to create a requisition using the WEB (Punch-Out) feature. The following are step-by-step instructions that will guide you through this activity.

Procedure

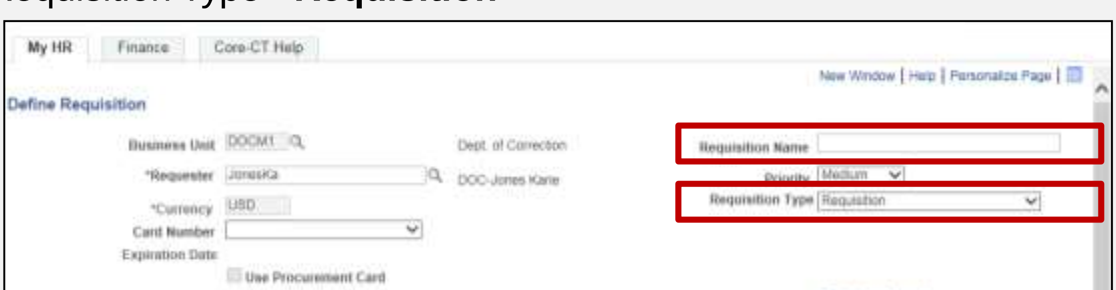
Step 1: From the Portal page, navigate to ***Main Menu > Core-CT Financials > eProcurement > Requisition.***

The **Define Requisition** page is displayed.



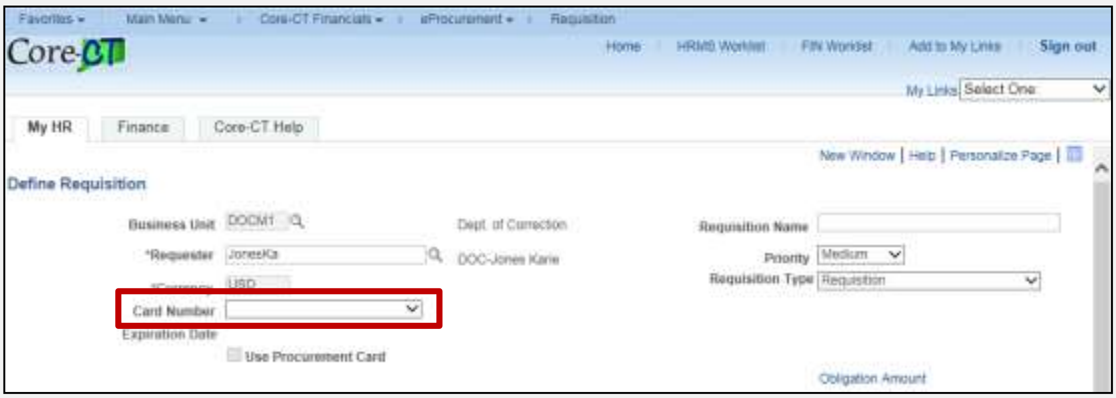
Step 2: Enter the header information for the requisition in the **Define Requisition** section:

- Requisition Name - **Printer Paper for Training**
- Requisition Type - **Requisition**



Procedure

Step 3: Select the P-Card ending in **4444 (MC)** from the **Card Number** dropdown.



Step 4: Enter the line and shipping information for the requisition in the **Line Defaults** and **Shipping Defaults** section.

- Buyer - **JonesKa**

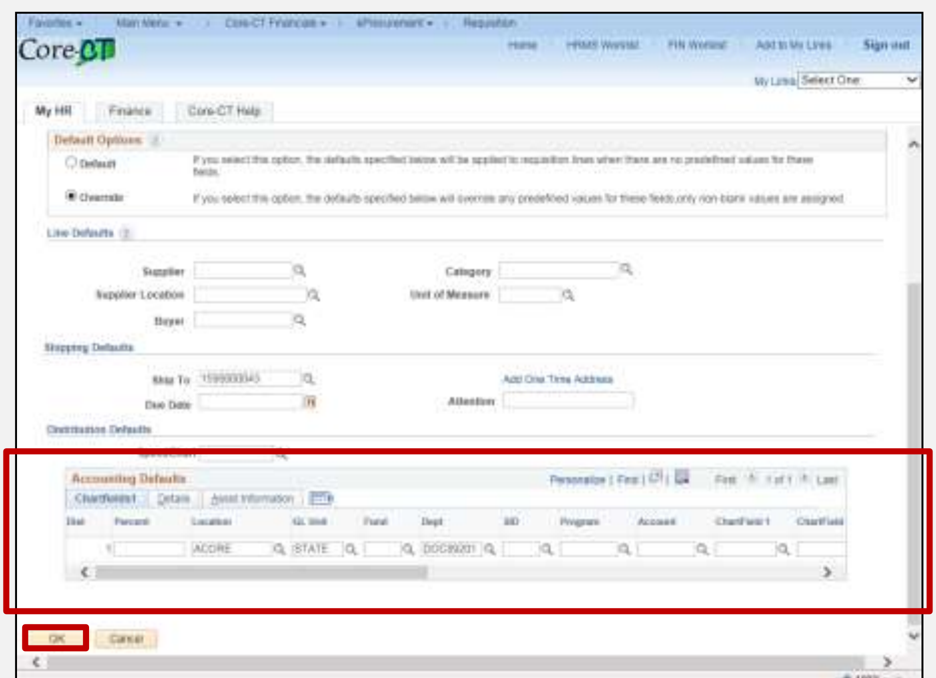
Exercise 2: Creating a Requisition Using the WEB (Punch-Out) Feature

Procedure

Step 5: Enter the distribution information for the requisition in the **Distribution Default** section.

- Fund - **11000**
- SID - **10020**
- Program - **00000**
- Account Code - **54060**
- PC Business Unit - **NONPC**
- Project - **DOC_NONPROJECT**

Click the **OK** button.

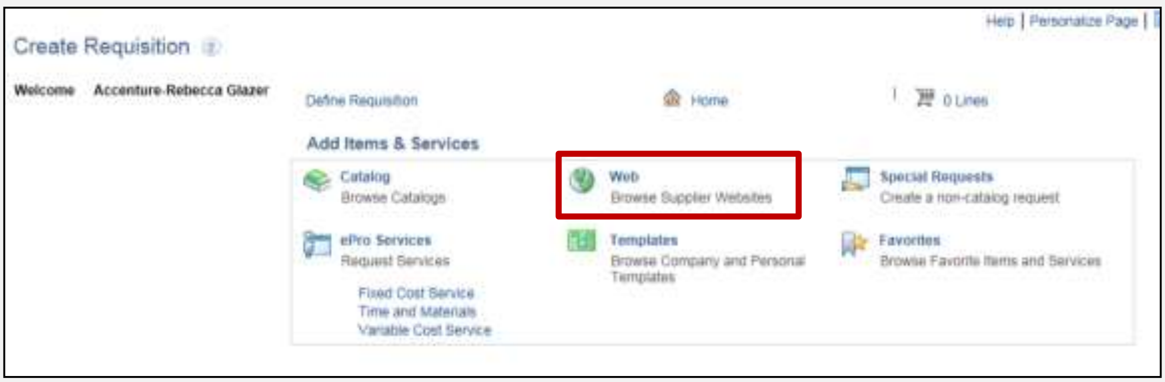


Exercise 2: Creating a Requisition Using the WEB (Punch-Out) Feature

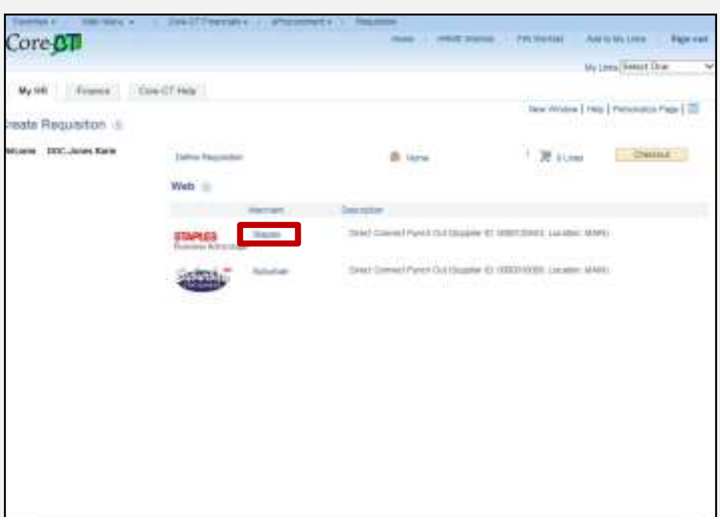
Procedure

Step 6: The **Create Requisition** page is displayed.

Click the **Web** link in the **Add Items & Services** section.



Step 7: There will be two Web Links displayed, Staples & Suburban Stationers. Click the **Staples** link.

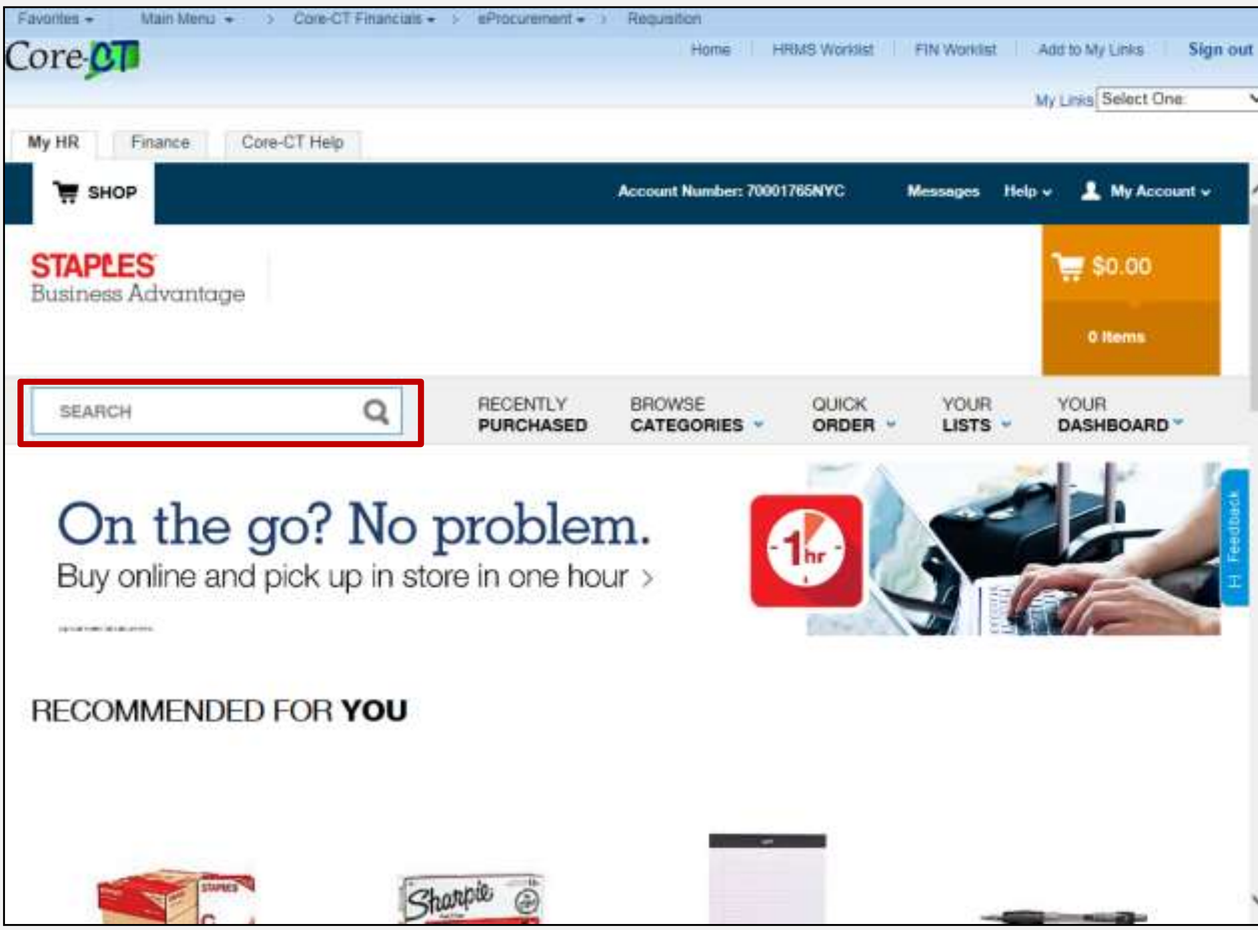


Procedure

The **Staples** home page is displayed.

Step 8: Enter **Printer Paper** into the **Search** box.

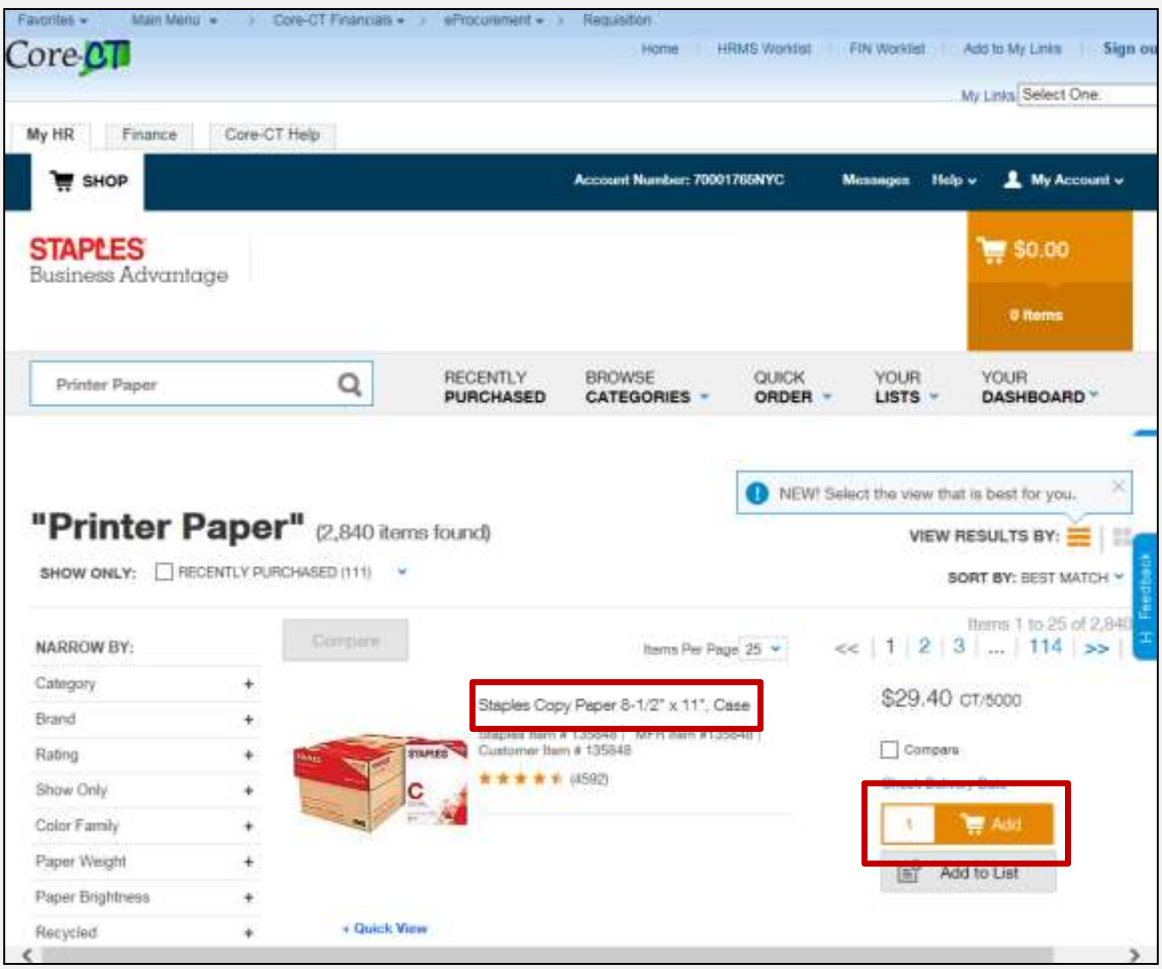
Click the **Search** (magnifying glass) button.



Procedure

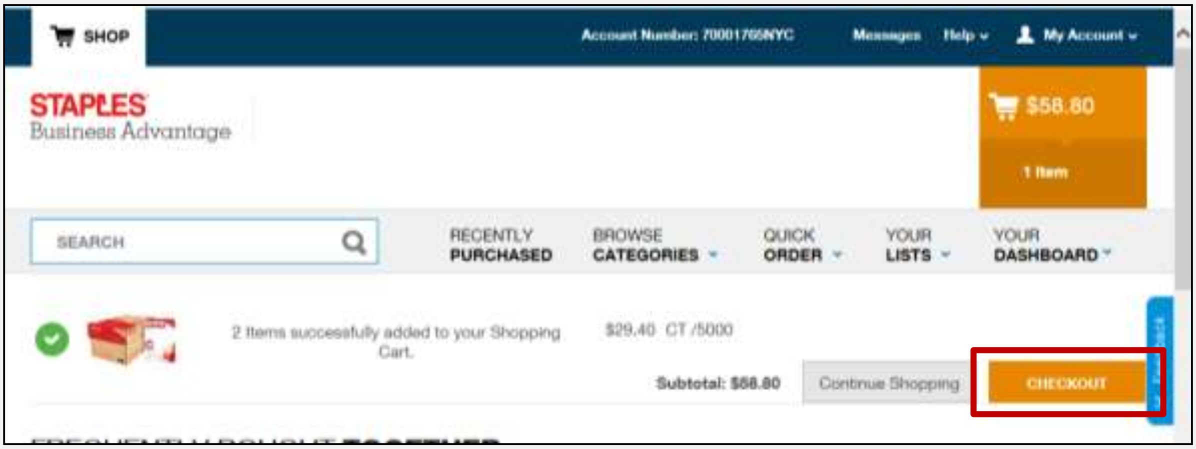
Step 9: The search results display **Staples Copy Paper 8-1/2" X 11", Case**.

- Enter **2** in the item's **Quantity** field.
- Click the item's **Add** button.

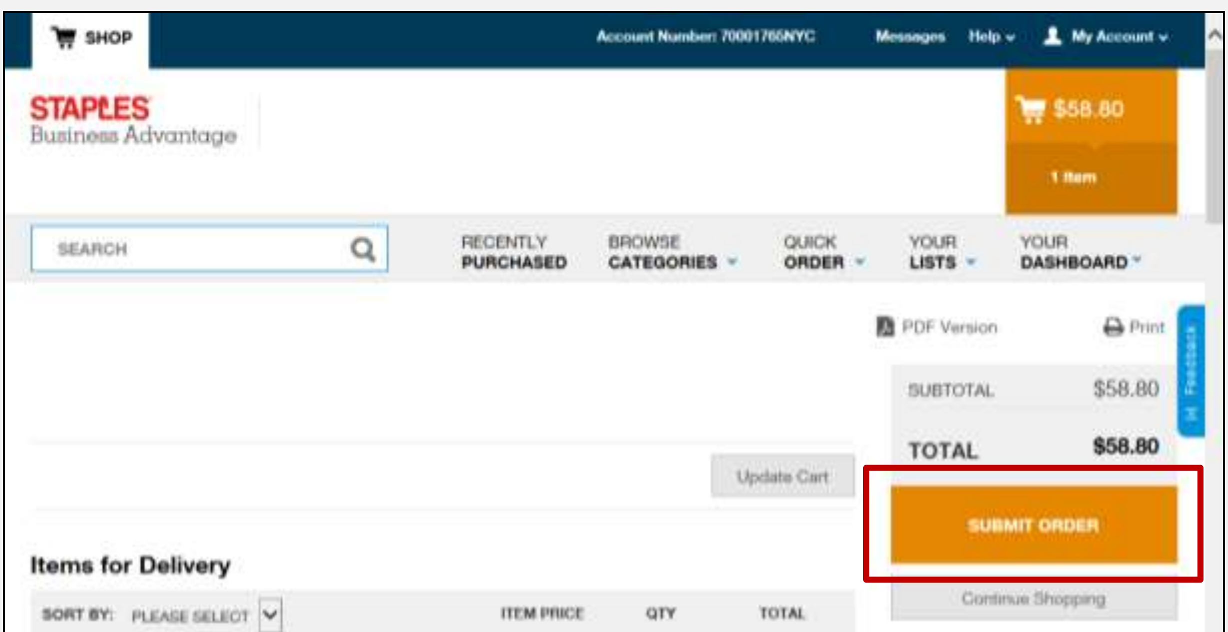


Procedure

Step 10: Click the **Checkout** button.



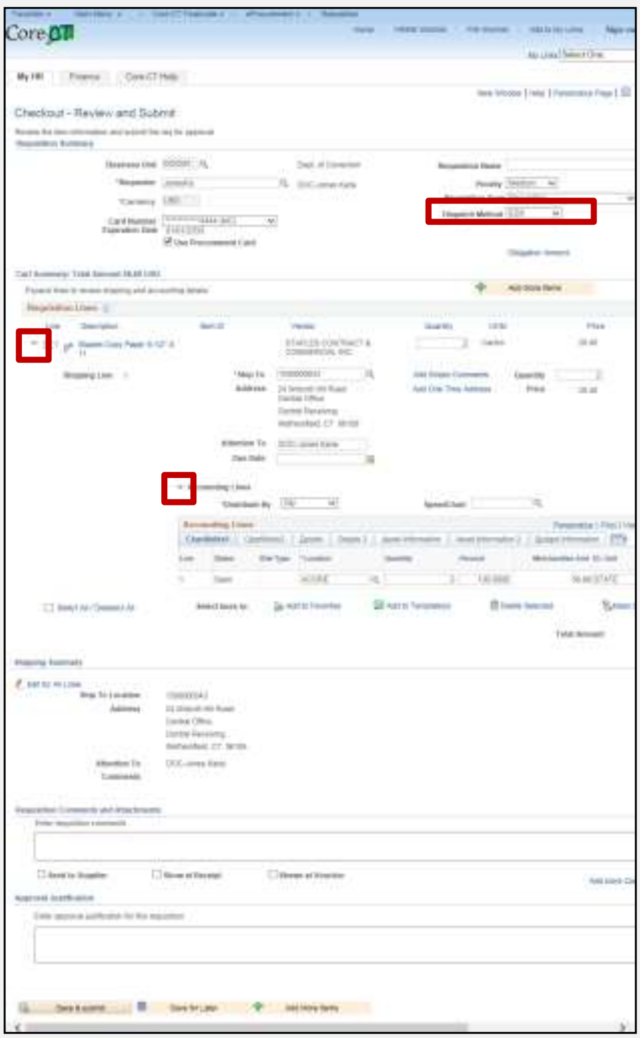
Step 11: Click the **Submit Order** button.



Procedure

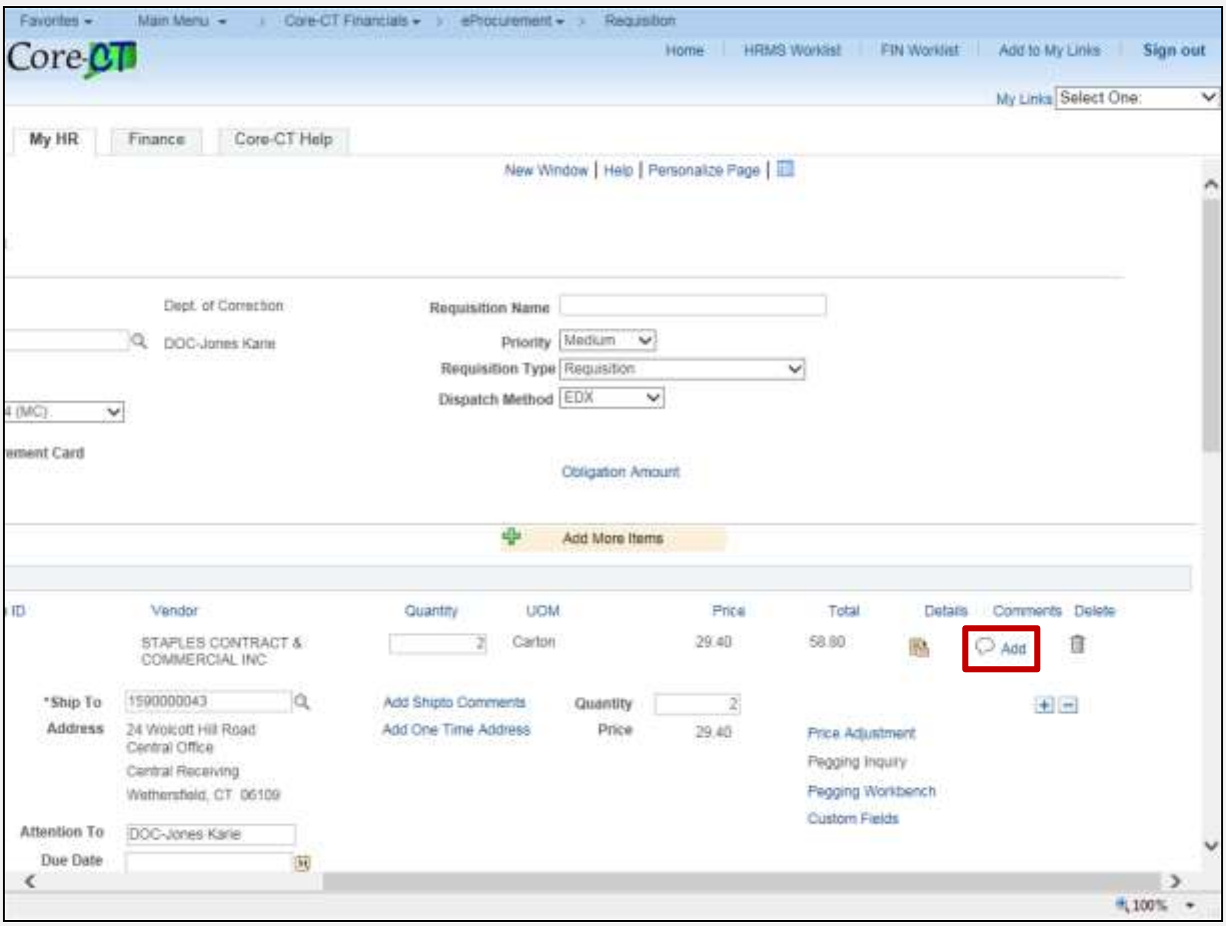
Step 12: The **Checkout – Review and Submit** page is displayed.

Use the dropdown arrows to review the Line, Shipping, and Accounting information for each item in the **Requisition Line** section.



Procedure

Step 13: Click on the **Add Comments and Attachments** button in the **Requisition Line** section.

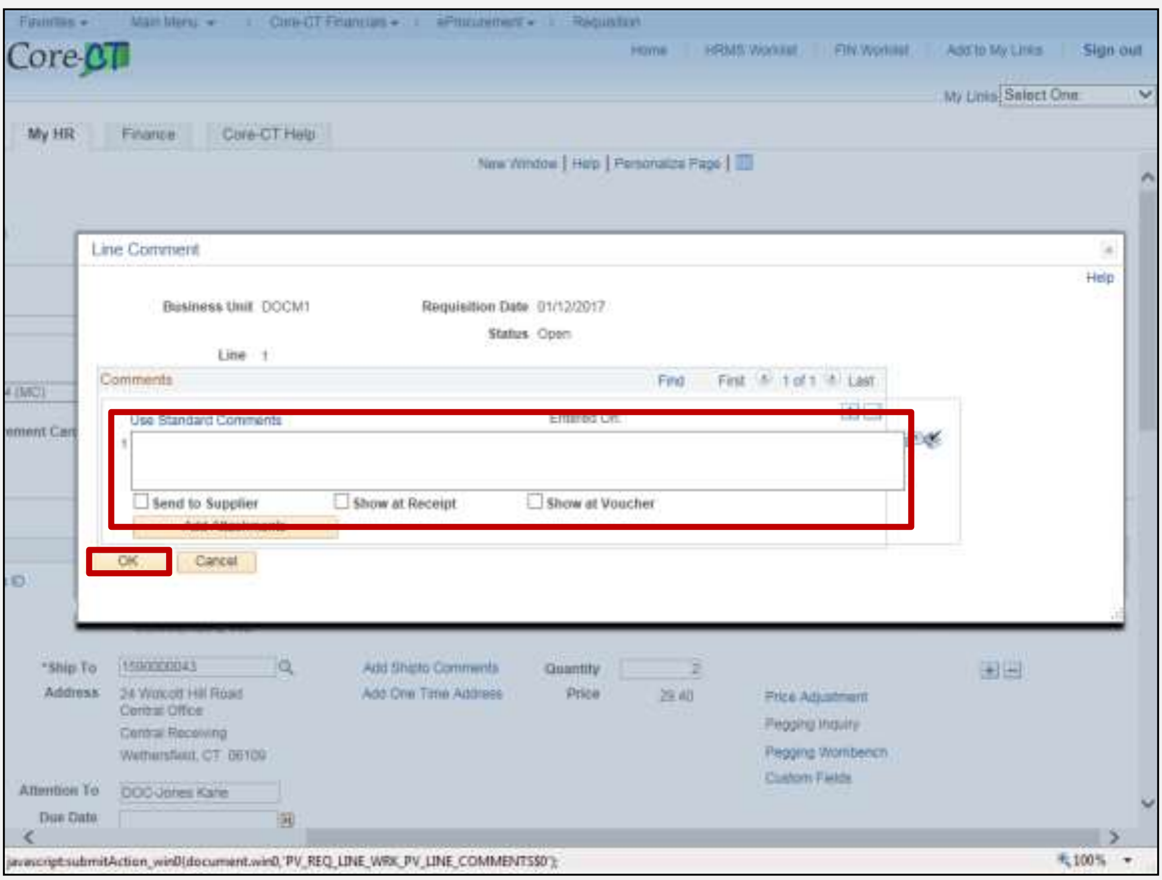


Procedure

Step 14: Enter "**Deliver to the 3rd Floor"** into the **Use Standard Comments** field.

Select the **Send to Supplier** Checkbox.

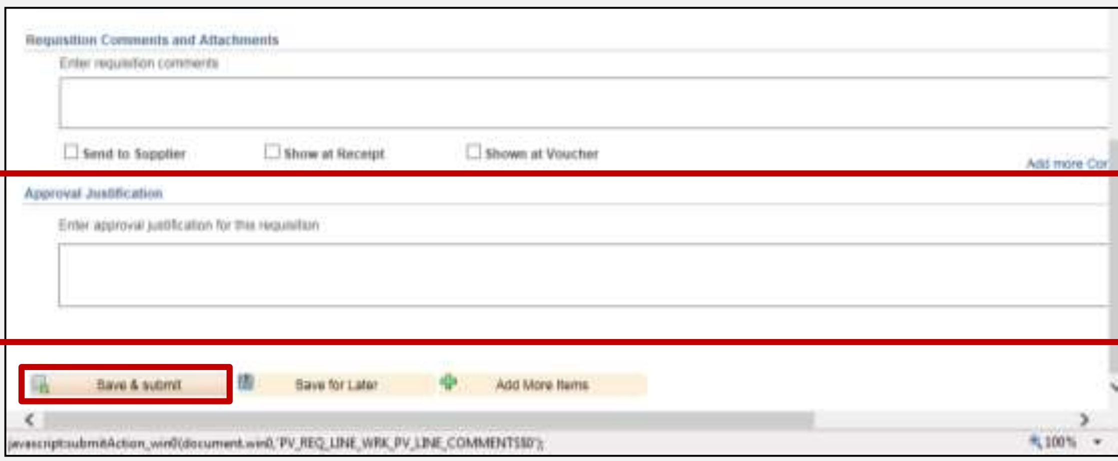
Click the **OK** button.



Procedure

Step 15: Enter "**This has been approved by the warden"** into the **Approval Justification** field.

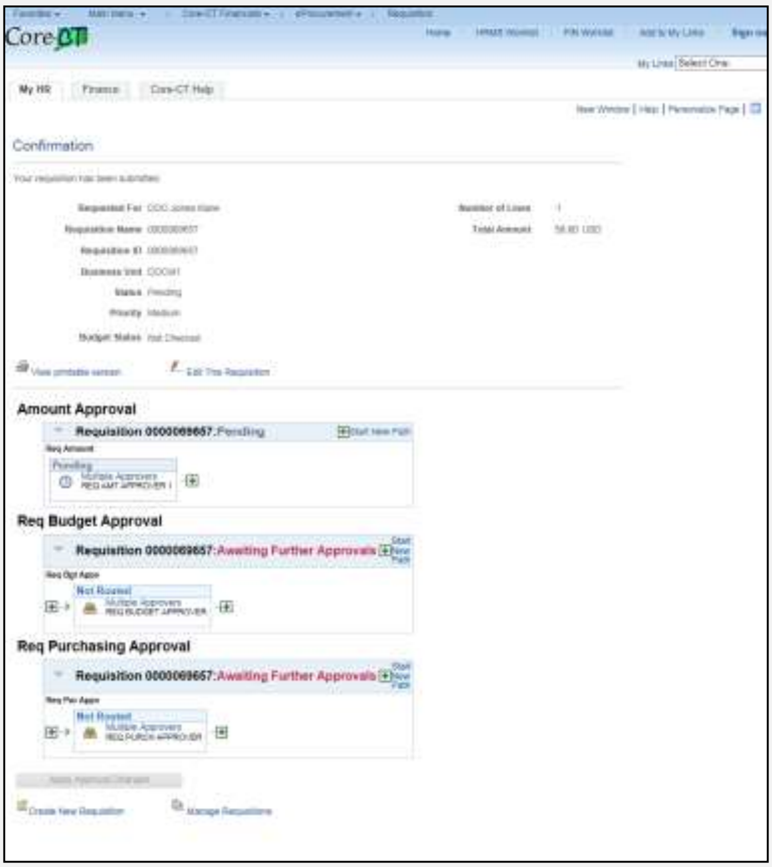
Click the **Save & submit** button.



Step 16: Click **OK** if the correct Requisition Type has been selected.

Procedure

Step 17: The **Confirmation** page is displayed and can be used to identify the Requisition Approvers.



You have successfully completed the steps to creating a requisition using the WEB (Punch-Out) feature.