

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.

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.

The screenshot shows the 'Define Requisition' form in the Core-CT system. The form includes fields for Business Unit (DOCM1), Dept. of Correction, Requester (JonesKa), and Card Number. The Card Number dropdown menu is highlighted with a red box, indicating the selection of the P-Card ending in 4444 (MC). Other fields include Requisition Name, Priority (Medium), and Requisition Type (Requisition).

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

- Buyer - **JonesKa**

The screenshot shows the 'Line Defaults' and 'Shipping Defaults' sections in the Core-CT system. The 'Buyer' field in the Line Defaults section is highlighted with a red box, indicating the selection of JonesKa. Other fields include Supplier, Supplier Location, Category, Unit of Measure, Ship To (150000043), and Distribution Defaults (SpeedChart).

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.

The screenshot shows the 'Accounting Defaults' section of the Core-CT Requisition form. The 'Default Options' are set to 'Override'. The 'Like Defaults' section includes fields for Supplier, Supplier Location, Budget, Category, and Unit of Measure. The 'Shipping Defaults' section includes fields for Ship To, Due Date, and Attention. The 'Accounting Defaults' section is highlighted with a red box and contains the following table:

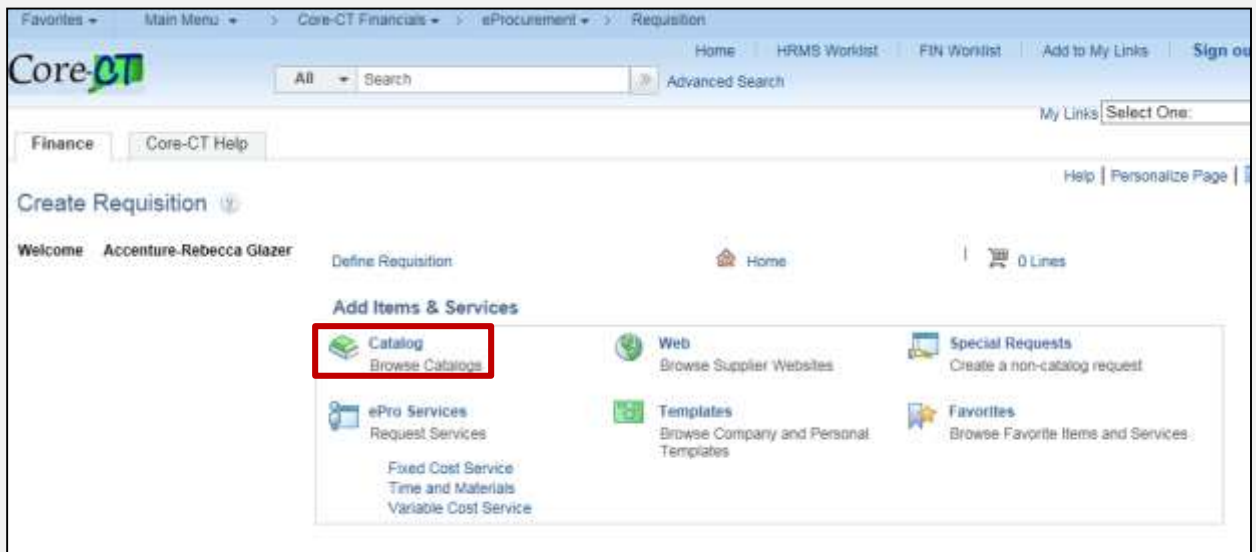
Item	Percent	Location	GL Item	Fund	Dept	SID	Program	Account	Chartfield 1	Chartfield 2
1	100	10000	10000	11000	10000	10020	00000	54060	10000	10000

The 'OK' button is highlighted with a red box at the bottom left of the form.

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.

The screenshot shows the 'Advanced Search' dialog box in the Core-CT system. The 'Advanced Item Search' section is active, and the 'Description' field is highlighted with a red box. The 'Search' button is also highlighted with a red box. The dialog box is open over the 'Create Requisition' page, which shows the 'Request Options' and 'Catalog' sections. The 'Search Name' field is empty, and the 'Search Contains' dropdown is set to 'All'. The 'Description' field is highlighted with a red box, and the 'Search' button is also highlighted with a red box. The dialog box is open over the 'Create Requisition' page, which shows the 'Request Options' and 'Catalog' sections.

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.

The screenshot shows the Core-CT eProcurement interface. The search results for "BAND AID PLASTIC 1 INCH X 3 INCH #5644" are displayed. The item is marked as a Contract. The quantity field is set to 2, and the 'Add' button is highlighted. The supplier information includes Common Cents EMS Supply LLC.

Item ID	Supplier Item ID	Mfg Item ID	Price	UOM	Supplier	Manufacturer	Manufacturer ID
CM_2157_2611730	5644	5644	17.42 USD	Box	COMMON CENTS EMS SUPPLY LLC	JOHNSON & JOHNSON SERVICES INC	JOHNSON&JO
CM_2157_7605037	DA312B8	DA312B8	9.80 USD		MOORE MEDICAL LLC	PROCTER & GAMBLE COMPANY	PROCTER&GA

Procedure

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

The screenshot displays the Core-CT procurement interface. At the top, there are navigation links for 'Home', 'HRMS Workst', 'FIN Workst', 'Add to My Links', and 'Sign out'. Below this, there are tabs for 'My HR', 'Finance', and 'Core-CT Help'. The main heading is 'Create Requisition'. A 'Request Options' dropdown is visible. On the left, there are filter sections for 'Item Category' (Medical Equipment and A., Defense and Law Enforcem., Structures and Building a., Commercial and Military a., Cleaning Equipment and Su.), 'Manufacturer Name' (ABC ENVIRONMENTAL LLC, EATON CORPORATION, ELDERLEE INC, HONEYWELL INTERNATIONAL, PROCTER & GAMBLE COMPANY), and 'Vendor Name 1' (EBP SUPPLY SOLUTIONS INC, MOORE MEDICAL LLC, GRAINGER INDUSTRIAL SUPPLY, ELDERLEE INC, R O STEEL CORP). The central area shows search results for 'BAND AID PLASTIC 1 INCH X 3 INCH #5644-100 PER BOX'. The selected item is shown with details: Item ID CM_2157_2611730, Supplier Item ID 5644, Mfg Item ID 5644, Price 17.42 USD, UOM Box, and Quantity 2. A 'Checkout' button is highlighted in red. A 'Shopping Cart' popup is also visible, showing the item details and a 'Checkout' button.

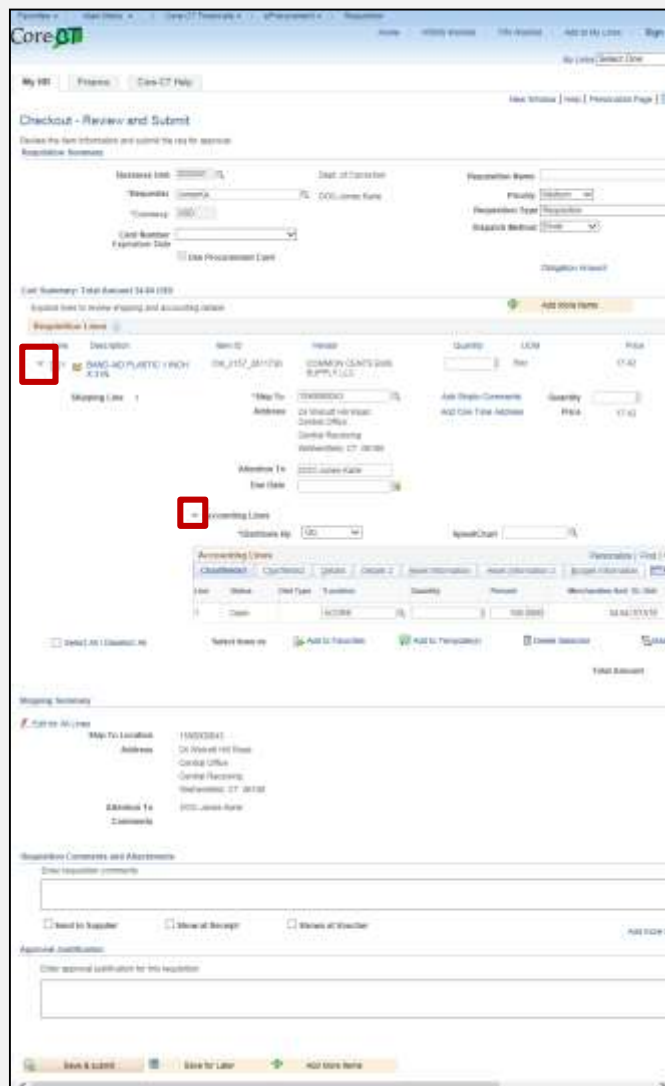
Description	Qty	UOM
BAND AID PLASTIC 1 INCH X...	2	BX

Total Lines	1
Total Amount (USD)	34.84

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.

The screenshot shows the Core-CT Requisition form. The 'Requisition Comments and Attachments' section is highlighted with a red box. It contains a text area for 'Enter requisition comments', a 'Send to Supplier' checkbox (which is also highlighted with a red box), and two other checkboxes: 'Show at Receipt' and 'Shown at Voucher'. Below this section is the 'Approval justification' section with a text area for 'Enter approval justification for this requisition'. At the bottom of the form, the 'Save & submit' button is highlighted with a red box. The breadcrumb trail at the top reads: Favorites > Main Menu > Core-CT Financials > eProcurement > Requisition. The top navigation bar includes links for Home, HRMS Worklet, FIN Worklet, Add to My Links, and Sign out. The 'My Links' dropdown menu is currently set to 'Select One'.

Procedure

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

The screenshot shows the Core-CT Requisition form with a confirmation dialog box overlaid. The dialog box is titled "Message" and contains the following text:

A saved Requisition Type can't be changed. Are you sure you want to save a Requisition Type of REQ? (23500,29)

Click ok to this message if you are sure you have selected the proper Requisition Type, or Cancel to return and change the Requisition Type.

The dialog box has two buttons: "OK" (highlighted with a red box) and "Cancel".

The background form includes sections for "Shipping Summary", "Requisition Comments and Attachments", and "Approval Justification".

Procedure

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

The screenshot shows the 'Confirmation' page in the Core-CT system. The page displays the following information:

- Account For:** DOC-open class
- Requisition Name:** 000089655
- Requisition ID:** 000089655
- Business Unit:** DDCM1
- Status:** Pending
- Priority:** Medium
- Budget Status:** Not Checked

Summary statistics:

- Number of Lines:** 1
- Total Amount:** \$4.01,000

Below the summary, there are three approval sections:

- Amount Approval:** Requisition 000089655 - Pending. Status: Pending. Multiple Approvals: REQ-AMT APPROV-EN1.
- Req Budget Approval:** Requisition 000089655 - Awaiting Further Approvals. Status: Not Started. Multiple Approvals: REQ BUDGET APPROV-EN1.
- Req Purchasing Approval:** Requisition 000089655 - Awaiting Further Approvals. Status: Not Started. Multiple Approvals: REQ PURCH APPROV-EN1.

At the bottom, there are links for 'View previous version', 'Call This Requisition', 'Create New Requisition', and 'Manage Requisitions'.

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

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.

The screenshot shows the 'Define Requisition' form in the Core-CT system. The 'Card Number' dropdown menu is highlighted with a red box. The form includes the following fields and values:

- Business Unit:
- Dept. of Correction: Dept. of Correction
- *Requester: (DOC-Jones Kane)
- Card Number: (highlighted with a red box)
- Expiration Date:
- Use Procurement Card:
- Obligation Amount:
- Requisition Name:
- Priority:
- Requisition Type:

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

- Buyer - **JonesKa**

The screenshot shows the 'Line Defaults' and 'Shipping Defaults' sections of the Core-CT form. The 'Buyer' field in the 'Line Defaults' section is highlighted with a red box. The form includes the following fields and values:

- Supplier:
- Supplier Location:
- Buyer: (highlighted with a red box)
- Category:
- Unit of Measure:
- Shipping Defaults:
 - Ship To:
 - Due Date:
 - Attention:
- Distribution Defaults:
 - Product:

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.

The screenshot shows the 'Accounting Defaults' section of the Core-CT Financials Requisition web application. The section is highlighted with a red box. It contains a table with the following data:

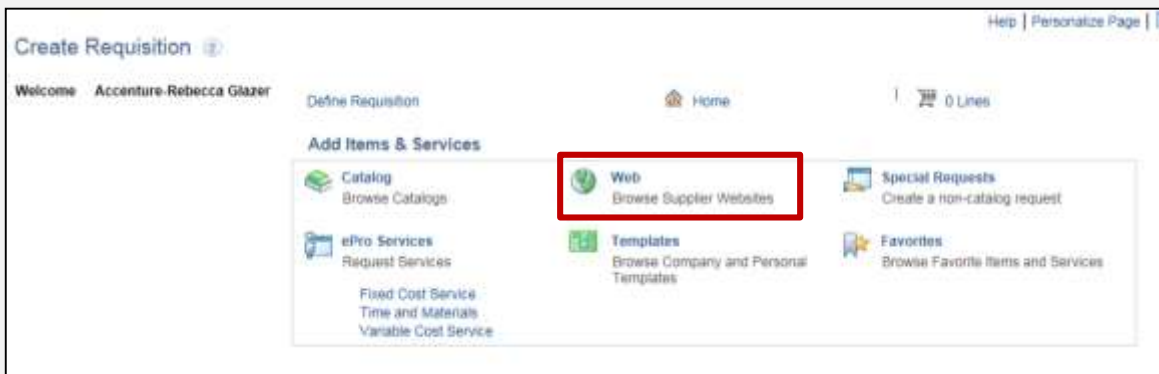
Item	Percent	Location	GC Unit	Fund	Dept	BD	Program	Account	Chartfield 1	Chartfield 2
1	100	ACORE	STATE	11000	10020	00000	54060	NONPC	DOC	NONPROJECT

Below the table, there are two buttons: **OK** and **Cancel**. The **OK** button is highlighted with a red box.

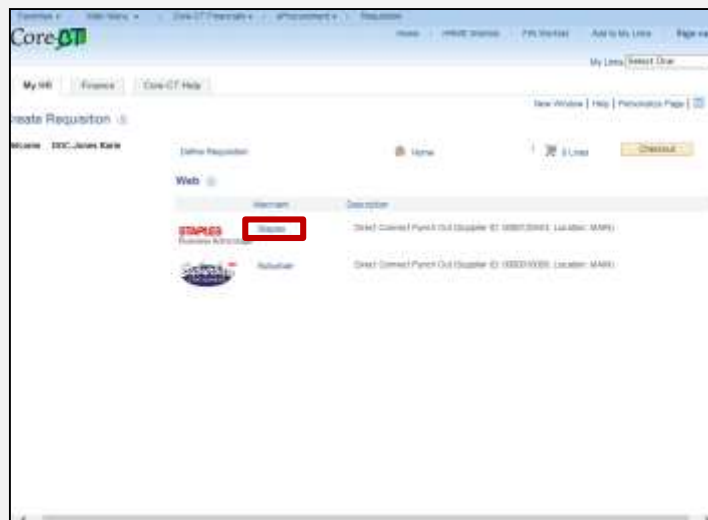
Procedure

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.

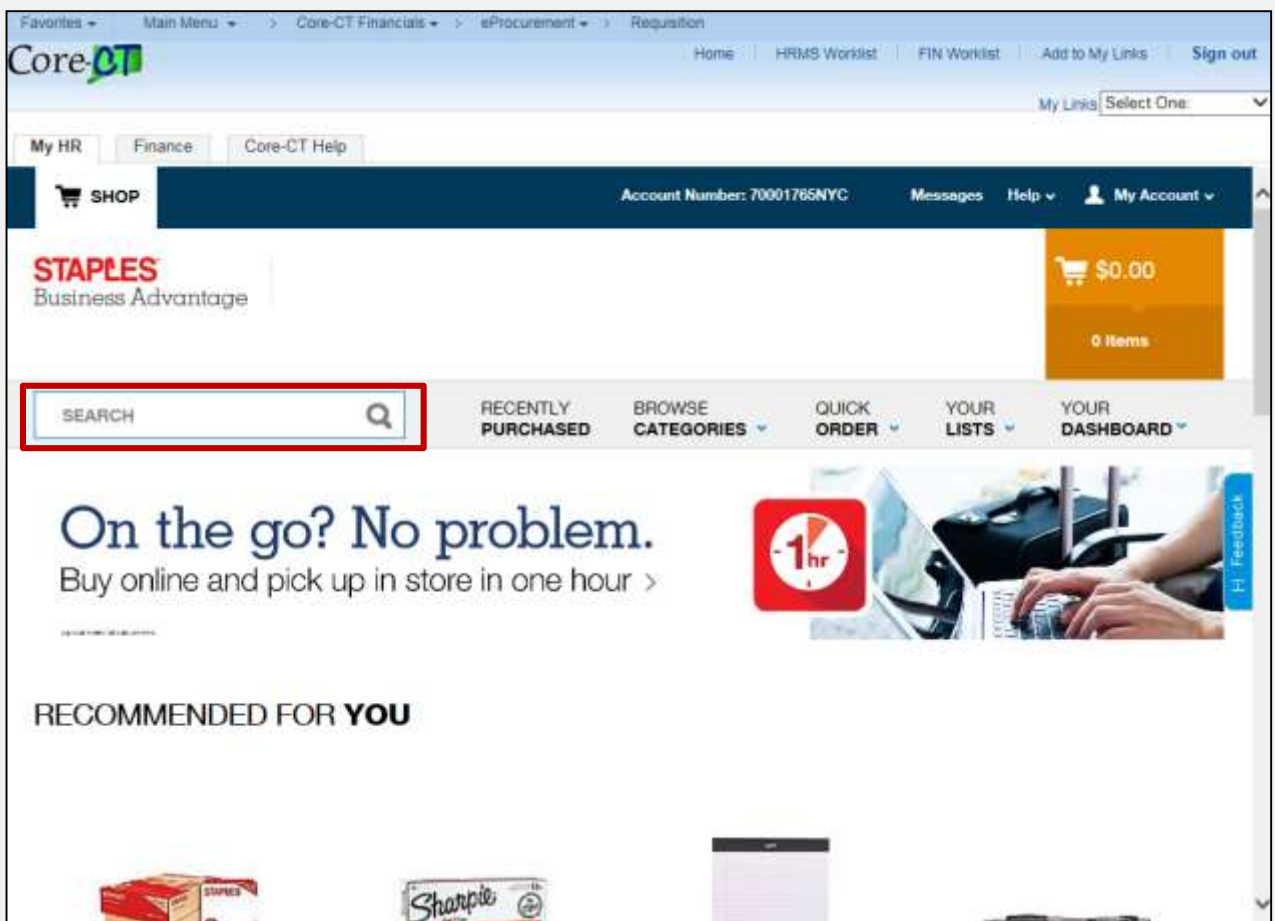


Procedure

The **Staples** home page is displayed.

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

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



Procedure

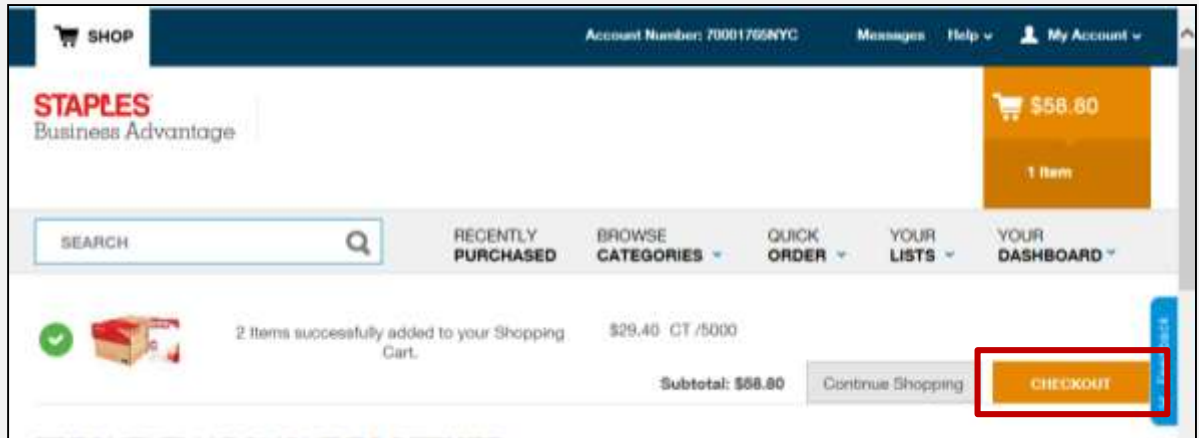
Step 9: The search results display **Staples Copy Paper 8-1/2" X 11"**, **Case**.

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

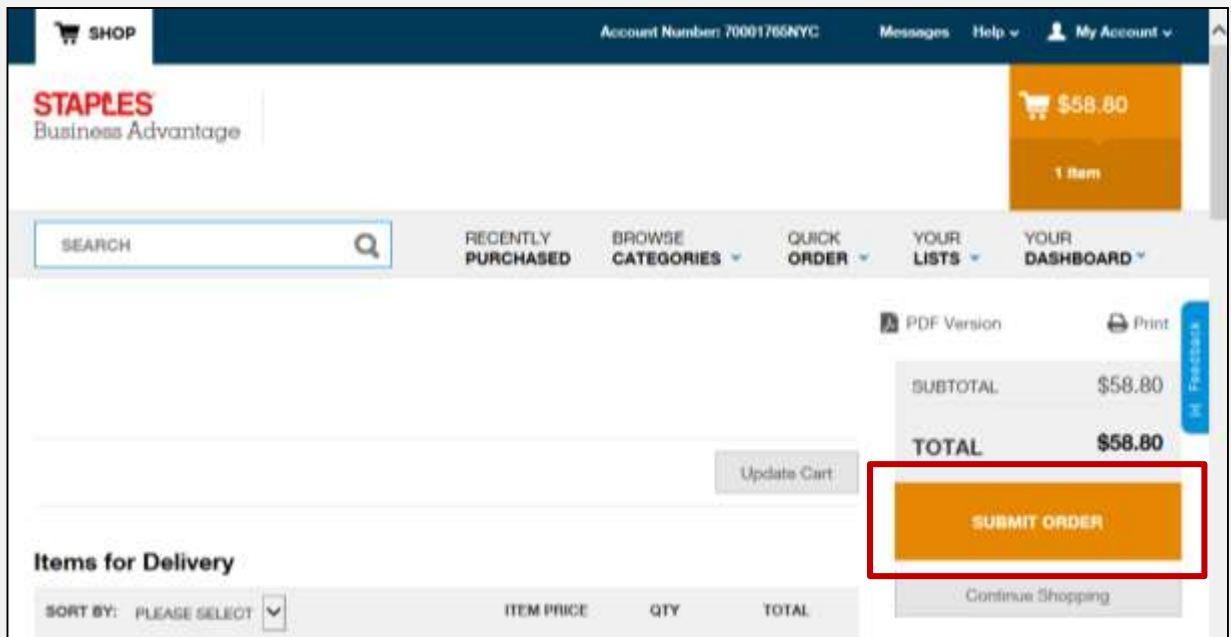
The screenshot shows the Core-CT eProcurement interface. At the top, there are navigation links for Home, HRMS Worklist, and FIN Worklist. Below that, there are tabs for My HR, Finance, and Core-CT Help. A dark blue navigation bar contains a SHOP icon, Account Number: 70001765NYC, Messages, Help, and My Account. The main content area features a search bar with 'Printer Paper' entered. Below the search bar, there are navigation options: RECENTLY PURCHASED, BROWSE CATEGORIES, QUICK ORDER, YOUR LISTS, and YOUR DASHBOARD. The search results are titled '"Printer Paper" (2,840 items found)'. A filter section on the left allows narrowing by Category, Brand, Rating, Show Only, Color Family, Paper Weight, Paper Brightness, and Recycled. The main product listing shows 'Staples Copy Paper 8-1/2" x 11", Case' with a price of \$29.40 CT/5000. A red box highlights the product title. Another red box highlights the 'Add' button, which has a quantity field set to '1'. Below the 'Add' button is an 'Add to List' button. A notification banner at the top right says 'NEW! Select the view that is best for you.'

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.

The screenshot displays the 'Checkout - Review and Submit' page in the Core-CT system. Key elements include:

- Requisition Summary:** Fields for Requisition Line (00001), Dept. of Extension, and Requisition Status (Approved). A dropdown arrow is highlighted in red next to the Requisition Line field.
- Requisition Line Table:** A table with columns: Description, Unit of Measure, Price, and Quantity. A dropdown arrow is highlighted in red next to the 'Shipping Line' column.
- Shipping Estimate:** Section for 'SHIP TO LOCATION' with fields for Address and Attention To.
- Requisition Comments and Request Justification:** Text areas for providing additional information.

Procedure

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

The screenshot shows the Core-CT eProcurement interface for creating a requisition. The breadcrumb trail is: Favorites > Main Menu > Core-CT Financials > eProcurement > Requisition. The user is logged in as DOC-Jones Karie. The requisition details include: Requisition Name (empty), Priority (Medium), Requisition Type (Requisition), and Dispatch Method (EDX). The requisition line table shows one item from STAPLES CONTRACT & COMMERCIAL INC. with a quantity of 2 and a price of 29.40. The 'Add Comments and Attachments' button is highlighted with a red box. Other buttons include 'Add More Items', 'Details', and 'Delete'.

ID	Vendor	Quantity	UOM	Price	Total	Details	Comments	Delete
	STAPLES CONTRACT & COMMERCIAL INC.	2	Carton	29.40	58.80		Add	

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.

The screenshot shows the 'Line Comment' dialog box in the Core-CT web application. The dialog box is titled 'Line Comment' and contains the following information:

- Business Unit: DOCM1
- Requisition Date: 01/12/2017
- Status: Open
- Line: 1
- Comments: Use Standard Comments
- Send to Supplier:
- Show at Receipt:
- Show at Voucher:
- OK button:
- Cancel button:

Procedure

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

Click the **Save & submit** button.

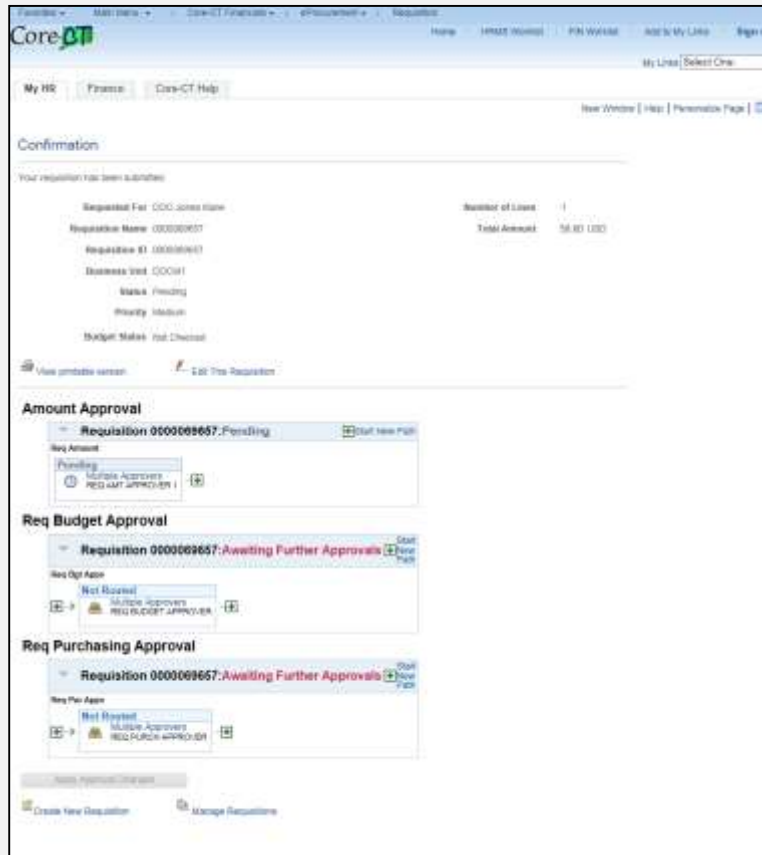
The screenshot shows a web form titled "Requisition Comments and Attachments". It contains a text area for "Enter requisition comments" and three checkboxes: "Send to Supplier", "Show at Receipt", and "Shown at Voucher". Below this is the "Approval Justification" section with a text area for "Enter approval justification for this requisition". At the bottom, there are three buttons: "Save & submit", "Save for Later", and "Add More Items". The "Save & submit" button is highlighted with a red box. The "Approval Justification" text area is also highlighted with a red box.

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

The screenshot shows the same Requisition form as in Step 15, but with a "Message" dialog box overlaid. The dialog box contains the following text: "A saved Requisition Type can't be changed. Are you sure you want to save a Requisition Type of REQ? (23500.29)". Below the text are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red box. The background form is dimmed.

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.