



eProcurement 9.2

Core-CT Financial Implementation Project



Introduction

eProcurement 9.2

Welcome



- Welcome to the eProcurement 9.2 course!
- Some guidelines for today's class:
 - Turn cell phones to silent or vibrate.
 - Ask questions.
 - Navigating the building.

Learning Objectives



- At the end of this course, you will be able to:
 - Search for items to add to a requisition through the Catalog feature.
 - Describe how to add items to a requisition through the WEB (Punch-Out) feature.
 - Explain how to use the Mass Change link.
 - Describe how to add a P-Card to a requisition.

Today's Schedule



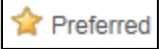
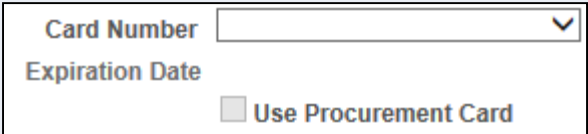
Module Name	Duration
Introduction	10 minutes
9.2 eProcurement Layout	40 minutes
Catalog Items	40 minutes
WEB (Punch-Out)	40 minutes
Review and Q&A	10 minutes

Updates and Benefits of 9.2

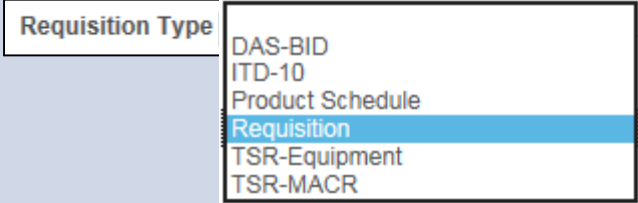
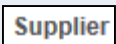



- Review of 9.2 changes:
 - Requisitions will be accessed through the eProcurement menu. The new eProcurement layout provides a different look than the current “3 Step Process”.
 - Mass changes provide the ability to change/update multiple requisition lines at the same time and replaces the Modify Line/Shipping/Accounting button.
 - “Save for later” button provides the ability to save a requisition without it being sent to workflow for approval and leaves the requisition in an open status.
 - Core-10 has been replaced by the term Requisition Type.
 - The term vendor has been replaced with supplier.
 - The office supply supplier’s (Suburban Stationers and Staples) site can now be accessed through the Core-CT WEB (Punch-Out) link.

Key Terminology

Key Term	Definition	Icon
Electronic Data Exchange (EDX) Dispatch	The requisition dispatch method for the Suburban and Staples suppliers when using WEB (Punch-Out).	
Mass Change	Ability to modify multiple requisition Line, Shipping, and Accounting details at the same time.	
Preferred Supplier	The Supplier with the lowest cost for an item.	
Procurement Card (P-Card)	Supports credit card purchases made by card holding employees.	

Key Terminology

Key Term	Definition	Icon
Requisition Type	Label that replaces Core-10.	
Suppliers	Replaces the term vendors.	
WEB (Punch-Out)	Ability to interact directly with a supplier's website. The supplier's online catalog can be searched to select items to add back into a requisition.	



9.2 eProcurement Updates

eProcurement 9.2

Define Requisition

- To create a requisition, navigate to the Requisition page: **Main Menu > Core-CT Financials > eProcurement > Requisition.**
- Enter the requisition Header, Line, Shipping and Accounting information (the **Buyer** field is required).
- The **P-Card** fields will display if a procurement card is assigned.
- Click the **OK** button.
- This information will move forward and be populated on each of the requisition lines.

The screenshot displays the 'Define Requisition' interface. Key elements include:

- Business Unit:** 000001
- Requisitioner:** 000001
- Requisition Name:** (empty)
- Priority:** 000001
- Requisition Type:** (dropdown menu)
- Card Number:** (input field, highlighted in red)
- Expiration Date:** (input field)
- Default Options:** Radio buttons for 'Default' and 'Override'.
- Line Defaults:**
 - Supplier:** (input field)
 - Category:** (input field)
 - Unit of Measure:** (input field)
 - Buyer:** (input field, highlighted in red)
- Shipping Defaults:**
 - Ship To:** (input field)
 - Date:** (input field)
 - Address:** (input field)
- Accounting Defaults:**
 - Account:** (input field)
 - Program:** (input field)
 - Headline 1:** (input field)
 - Headline 2:** (input field)
- Table:** A table with columns: Line, Parent, Location, UOM, Item, Unit, Org, Program, Amount, Headline 1, Headline 2. The first row contains values: 1, ACHE, STATE, STATE, 000001, 000001, 000001, 000001, 000001, 000001, 000001.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom left, both highlighted in red.

Requisition Type

- Core-10 has been replaced by the term Requisition Type.

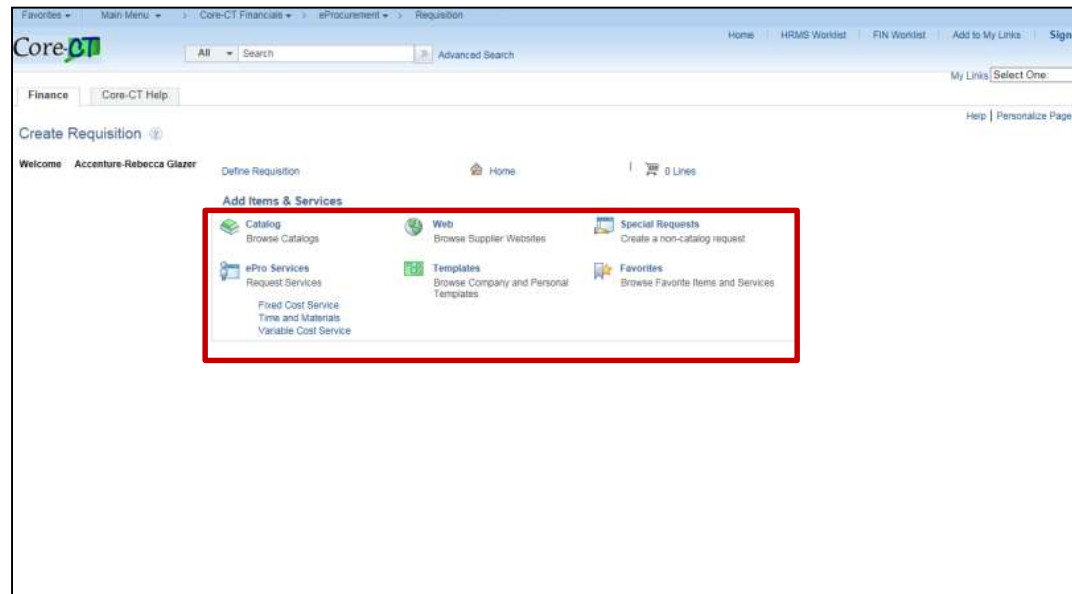
The screenshot displays the 'Define Requisition' form in the Core-CT system. The form is titled 'Define Requisition' and includes several sections for data entry:

- Business Unit:** DASM1 (Dept of Administrative Svcs)
- *Requester:** MarzanofM (DAS-Marzano Melissa)
- *Currency:** USD
- Card Number:** [Dropdown]
- Expiration Date:** [Field]
- Use Procurement Card:** [Checkbox]
- Requisition Name:** [Field]
- Priority:** Medium
- Requisition Type:** A dropdown menu is open, showing the following options: DAS-BID, ITD-10, Product Schedule, Requisition (highlighted), TSR-Equipment, and TSR-MACR.

Below the main form, there are sections for 'Default Options', 'Line Defaults', 'Shipping Defaults', and 'Distribution Defaults'. The 'Default Options' section includes radio buttons for 'Default' and 'Override'. The 'Line Defaults' section includes fields for Supplier, Supplier Location, Buyer, Category, and Unit of Measure. The 'Shipping Defaults' section includes fields for Ship To, Due Date, and Attention. The 'Distribution Defaults' section is partially visible at the bottom.

Add Items to the Requisition

- On the Create Requisition page, select one of the six ways to add an item or service:
 - Catalog
 - WEB (Punch-Out)
 - WEB is exclusive to Punch-Out purchases only. This option cannot be mixed with any other way to add an item or service.
 - Special Request
 - ePro Services
 - Templates and Favorites



Add Items to the Cart

- Selected items will appear in the Shopping Cart where they can be reviewed.
- Click the **Checkout** button to submit the requisition.
- The shopping cart can be moved around the screen as needed.

The screenshot displays the 'Create Requisition' page in the Core-CT eProcurement system. The page includes a navigation bar with 'Home', 'HRMS Worklist', 'FIN Worklist', 'Add to My Links', and 'Sign out'. Below the navigation bar, there are tabs for 'My HR', 'Finance', and 'Core-CT Help'. The main content area is titled 'Create Requisition' and shows a 'Special Requests' section with various input fields for item details, supplier, and manufacturer. A 'Shopping Cart' overlay is visible on the right side of the page, containing a table with the following data:

Description	Qty	UOM
CISCO ADNACE SERVICE ROUT...	2	EA
Special Tech Supplies	2	EA

Below the table, the cart summary shows 'Total Lines: 2' and 'Total Amount (USD): 320.50'. There are 'Close' and 'Checkout' buttons at the bottom of the cart overlay. The 'Checkout' button is highlighted with a red box in the original image.

Review Requisition Information

- Review the header and line items for the requisition.
- Use the **Requisition Line** dropdown arrows (▶) to view each Line's Accounting and Ship To information.

Core-CT Requisition Review and Submit

Business Unit: DABMT Dept of Administrative Svcs
 *Requester: Marzardo DAS-MacZaro Melissa
 *Currency: USD

Requisition Name: Tech Supplies
 Priority: Standard
 Requisition Type: Requisition
 Dispatch Method: Email
 Obligation Amount: []

Cart Summary: Total Amount: 326.50 USD
 Expand lines to review shipping and accounting details

Line	Description	Item ID	Vendor	Quantity	UOM	Price
1	CISCO ADVANCE SERVICE ROUTER IS	GM_2157_7275844	EPLUS TECHNOLOGY INC	2	Each	60.25

Shipping Line: 1
 *Ship To Address: 185 Capitol Ave, 18th Floor South, Procterium, Hartford, CT 06106
 Attention To: DAS MACZARO Melissa
 Due Date: []

Accounting Lines
 *Distribute By: CV SpeedChart: []

Line	Status	Dist Type	Location	Quantity	Percent	Merchant/Prod	GL Dist
1	Open	ACORE	CORE	2	100.0000		100 SO STATE

Special Tech Supplies OFFICE DEPOT [] Each 60.00

Total Amount: []

Mass Change

- Click the **Mass Change** link to update the Line, Shipping or Accounting entries on selected lines.

The screenshot displays the Core-CT web application interface for a requisition. The breadcrumb trail is: Favorites > Main Menu > Core-CT Financials > eProcurement > Requisition. The page title is "Core-CT" and the user is logged in as "MarzanoM". The requisition details are as follows:

DASM1	Dept of Administrative Svcs	Requisition Name	Tech Supplies
MarzanoM	DAS-Marzano Melissa	Priority	Medium
USD		Requisition Type	Requisition
		Dispatch Method	Email
		Obligation Amount	

Below the requisition details is a table of items with the following columns: Item ID, Vendor, Quantity, UOM, Price, Total, Details, Comments, and Delete. The table contains two rows of items:

Item ID	Vendor	Quantity	UOM	Price	Total	Details	Comments	Delete
CM_2157_7276844	EPLUS TECHNOLOGY INC	2	Each	80.25	160.50			
	OFFICE DEPOT	2	Each	80.00	160.00			

At the bottom of the table, there are several action buttons: "Select lines to:", "Add to Favorites", "Add to Template(s)", "Delete Selected", and "Mass Change". The "Mass Change" button is highlighted with a red box.

Total Amount: 320.50 USD

Mass Change

- The requisition's Line, Shipping and Accounting information can be edited on the **Mass Change** page.
- The **Load Values from Defaults** link can be used to update blank fields with preset values.
- Click **OK** when finished making updates.

Core-CT Edit Lines/Shipping/Accounting for Selected Lines

Line Information

Note! The information below does not reflect the data at 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: Supplier Location:

Buyer: Category:

Shipping Information

Ship To Location: Add One Time Address

Due Date: Attention:

Comments:

Accounting Lines

SpeedChart:

Please enter GL Business Unit before selecting other chartfield values

Accounting Information

Det	Percent	Location	GL Unit	Fund	Dept	BID	Program	Account
1								

Load Values From Defaults

OK Cancel

Mass Change

- Choose the appropriate distribution change option.
- Click **OK**.

The screenshot displays the Core-CT Procurement interface. The main page is titled "Checkout - Review and Submit" and shows a "Requisition Summary" with fields for Business Unit (SABM), Dept of Administrative Svcs, Requisition Name, Requester (MacanM), and Currency (USD). A "Cart Summary" indicates a total amount of 520.50 USD. Below this is a "Requisition Lines" table with two lines: "CISCO ADVANCE SERVICE ROUTER 10" and "OFFICE DEPOT".


A modal dialog box titled "Distribution Change Options" is overlaid on the page. It contains the following text and options:

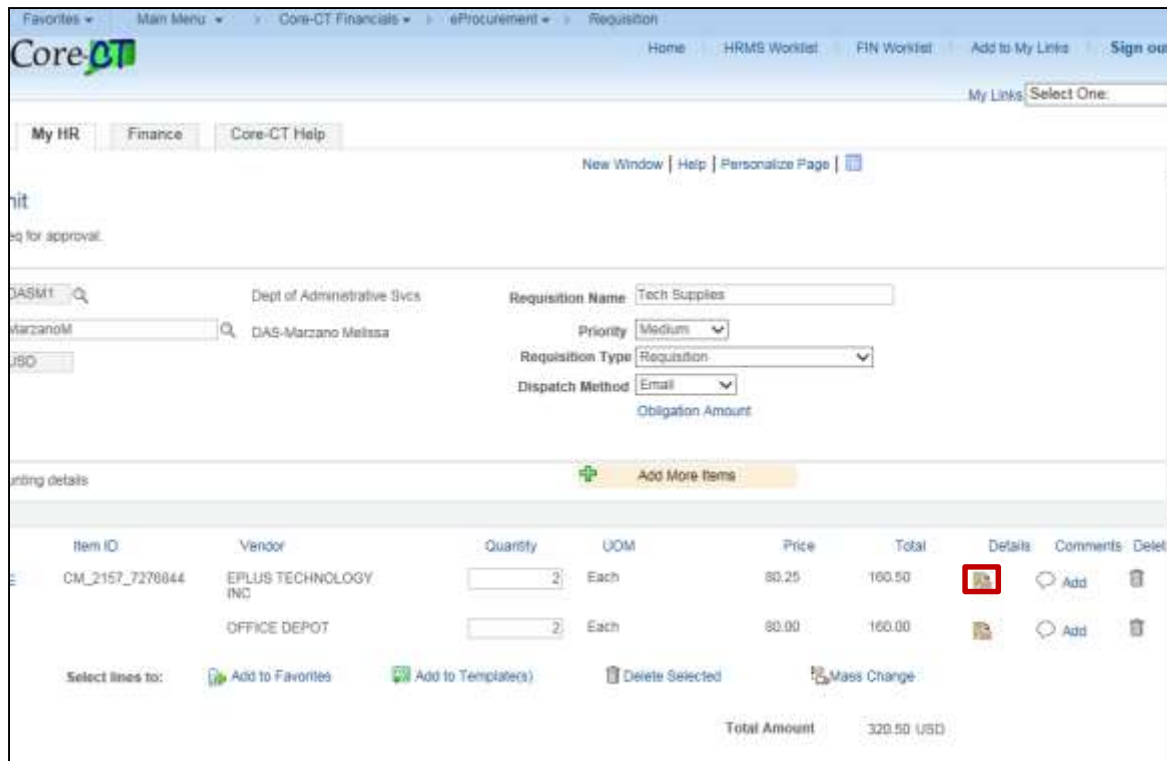
For the selected requisition lines that are available for sourcing, apply distribution changes to

- All Distribution Lines
Apply changes to all existing distribution lines.
- Matching Distribution Lines
Apply changes to each existing distribution line by matching the distribution line numbers.
- Replace Distribution Lines
Remove the existing distribution line and replace with the distribution lines changes.







At the bottom of the dialog are "OK" and "Cancel" buttons.

Contract ID

- Click the **Line Details** button () next to each line item to add a Contract ID to each line item.
- The Contract ID does not default for special request items.
- The Contract ID will default to a WEB (Punch-Out) requisition when the **Save & submit** button is clicked.



The screenshot displays the Core-CT eProcurement Requisition page. The page header includes navigation links for Home, HRMS Worklist, FIN Worklist, Add to My Links, and Sign out. Below the header, there are tabs for My HR, Finance, and Core-CT Help. The main content area shows a requisition for 'Tech Supplies' with a priority of 'Medium' and a requisition type of 'Requisition'. The requisition is for 'Dept of Administrative Svcs' and is associated with 'DAS-Mazzano Melissa'. The requisition name is 'Tech Supplies' and the dispatch method is 'Email'. The requisition amount is 320.50 USD.

Item ID	Vendor	Quantity	UOM	Price	Total	Details	Comments	Delete
CM_2157_7270044	EPLUS TECHNOLOGY INC	<input type="text" value="2"/>	Each	80.25	160.50		 Add	
	OFFICE DEPOT	<input type="text" value="2"/>	Each	80.00	160.00		 Add	

At the bottom of the table, there are buttons for 'Add to Favorites', 'Add to Templates', 'Delete Selected', and 'Mass Change'. The total amount is 320.50 USD.

Contract ID

- Enter a Contract ID into the **Contract ID** field under the **Contract Information** section (use the look-up button when necessary).
- Click **OK** to return to the Review and Checkout page.

The screenshot displays the 'Line Details' form in the Core-CT system. The form is titled 'Line Details' and shows the following information:

- Line:** 188 CISCO ADNACE SERVICE ROUTER 10
- Line Status:** Open
- Item Details:**
 - Merchandise Amount: 160.50 USD
 - Item ID: CN_2157_7276844
 - Category: 43000000
 - Original Substituted Item Description: (empty)
 - Physical Nature: Goods (dropdown menu)
 - Buyer: Marzahnov (lookup field)
 - Buyer Information: (empty)
 - Configuration Info: (empty)
- Contract Information:**
 - Use Contract if Available
 - Contract ID:** (lookup field, highlighted with a red box)
 - Contract Details:
 - Version: (empty)
 - Contract Line: (lookup field)
 - Category Line: (lookup field)

Save and Submit

- Add comments and attachments to the **Requisition Comments and Attachments** section to either the lines or the header.
- Click the **Save & submit** button when ready to submit requisition for workflow approval.

The screenshot displays the Core-CT Requisition form. The top navigation bar includes 'Favorites', 'Main Menu', 'Core-CT Financials', 'eProcurement', and 'Requisition'. The breadcrumb trail is 'Home > HRMS Worklist > FIN Worklist > Add to My Links > Sign out'. The 'My Links' dropdown is set to 'Select One'. The main content area has tabs for 'My HR', 'Finance', and 'Core-CT Help'. The 'Shipping Summary' section shows 'Ship To Location' 0640000033, 'Address' 165 Capitol Ave, 5th Floor South, Procurement, Hartford, CT 06106, and 'Attention To Comments' DAS-Marzano Melissa. The 'Requisition Comments and Attachments' section is highlighted with a red border and contains a text area for 'Enter requisition comments', three checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Shown at Voucher', and a link for 'Add more Comments'. The 'Approval Justification' section has a text area for 'Enter approval justification for this requisition'. At the bottom, the 'Save & submit' and 'Save for Later' buttons are highlighted with red boxes.



Catalog Items

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Define Requisition

- The State Catalog can be used to search for market basket items.
- To create a requisition, navigate to the Requisition page: **Main Menu > Core-CT Financials > eProcurement > Requisition.**
- Enter the requisition Header, Line, Shipping and Accounting information (the **Buyer** field is required).
- The **P-Card** fields will display if a procurement card is assigned.
- Click the **Ok** button.
- This information will move forward and be populated on each of the requisition lines.

Define Requisition

Business Unit: 00001 [v] Dept of Administrative Serv Requisition Name: []
 *Requirer: Malcom [v] 2000 Malcom Malcom Priority: 00000 [v]
 Card Number: [] Requisition Type: []
 Expiration Date: [] Use Procurement Card

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 when those values are assigned.

Line Defaults:

Supplier: [] Category: []
 Supplier Location: [] Unit of Measure: []
 Buyer: []

Shipping Defaults:

Ship To: 00000101 [v] Add One Time Address
 Ship Date: [] Address: []

Item Default Defaults:

Item: [] Use Procurement Card

Accounting Defaults

Unit	Percent	Location	GL Post	Post	Year	BS	Region	Account	Classified?	Classified
1		30000	STATE		0000000					

OK Cancel

Requisition Type

- Core-10 has been replaced by the term Requisition Type.

Core-CT

Home | HRMS Worklist | FIN Worklist | Add to My Links | Sign out

My Links Select One

My HR | Finance | Core-CT Help

New Window | Help | Personalize Page

Define Requisition

Business Unit: DASMT | Dept of Administrative Svcs

*Requester: MarzanoM | DAS-Marzano Melissa

*Currency: USD

Card Number: | Expiration Date: | Use Procurement Card

Requisition Name: | Priority: Medium

Requisition Type:

- DAS-BID
- ITD-10
- Product Schedule
- Requisition
- TSR-Equipment
- TSR-MACR

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: | Category: | Supplier Location: | Unit of Measure: | Buyer: |

Shipping Defaults

Ship To: 0540000033 | Add One Time Address: | Due Date: | Attention: |

Distribution Defaults

SpeedChart: |

Catalog Link

- Click the **Catalog** link to access the item catalog.

The screenshot displays the Core-CT eProcurement system interface. The breadcrumb trail at the top reads: Favorites > Main Menu > Core-CT Financials > eProcurement > Requisition. The user is logged in as Accenture-Rebecca Glazer. The main heading is 'Create Requisition'. Below this, there are navigation links for 'Define Requisition', 'Home', and a shopping cart icon showing '0 Lines'. The 'Add Items & Services' section is highlighted with a red box and contains the following links:

- Catalog** (Browse Catalogs)
- Web** (Browse Supplier Websites)
- Special Requests** (Create a non-catalog request)
- ePro Services** (Request Services)
 - Fixed Cost Service
 - Time and Materials
 - Variable Cost Service
- Templates** (Browse Company and Personal Templates)
- Favorites** (Browse Favorite Items and Services)

State Catalog

- Click the **Catalog** link to access the State Catalog.
- Search for an item to add to the requisition.
- Enter the information with an asterisk (*) at the end of the search criterial depending upon which field is chosen.
 - Please refer to Searching the State Catalog Job Aid.

The screenshot displays the Core-CT eProcurement system interface. A red-bordered dialog box titled "Advanced Search" is open, showing the "Advanced Item Search" section. This section includes a "Search Name" field, a "Save Search Criteria" button, and a "Search Tip" link. Below this, a dropdown menu indicates "*Search Contains All" of the following search fields entered. The fields are: Description (Contains Any), Manufacturer (Contains Any), Manufacturer ID (Contains Any), Supplier (Contains Any), Supplier ID (Contains Any), Item ID (Contains Any), GTIN (Contains Any), and Category ID (Contains Any). A "Search" button is located below these fields. Below the "Advanced Item Search" section is a "Search By Contract ID" section with a "Contract" field and a "Contract Search" button. At the bottom of the dialog box are "Clear" and "Cancel" buttons. In the background, the "Catalog" link is highlighted with a red box.

Select an Item and Add to Cart

- Enter the quantity in the **Quantity** field.
- Click the **Add** button to add items to the cart.

The screenshot displays the Core-CT eProcurement interface. At the top, there is a navigation bar with 'Home', 'HRMS Worklist', 'FIN Worklist', 'Add to My Links', and 'Sign out'. Below this, a 'My Links' dropdown menu is set to 'Select One'. The main content area is titled 'Create Requisition' and includes a 'Request Options' dropdown and a 'Catalog' button. A search for 'GRAINGER' has been performed, resulting in 435 items returned. The search results are displayed in a table with columns for 'Item ID', 'Supplier Item ID', 'Mfg Item ID', 'Price', 'UOM', 'Supplier', 'Manufacturer', and 'Lead Time'. The first item is '11-02 Archive 13' with a price of 1.39 USD. The 'Quantity' field for this item is set to 20, and the 'Add' button is highlighted with a red box. The second item is 'ABRASIVE DISC - DIA 2 IN - ZIRCONIA ALUMINA ABRASIVE - 38 GR' with a price of 21.39 USD.

Item ID	Supplier Item ID	Mfg Item ID	Price	UOM	Supplier	Manufacturer	Lead Time
CM_536_20	110213	110213	1.39	USD	GRAINGER INDUSTRIAL SUPPLY	ADOBE SYSTEMS INCORPORATED	1
CM_2157_3401960	1EDK6	1EDK6	21.39	USD	GRAINGER INDUSTRIAL SUPPLY	ARC ABRASIVES INC	

Review Cart and Checkout

- Review the items in the Shopping Cart.
- Click the **Checkout** button.

The screenshot displays the Core-CT eProcurement interface. The main content area shows a search for "GRAINGER" with 433 results returned. The first result is "11-02 Archive 13" with a price of 1.39 USD and a quantity of 20. The second result is "ABRASIVE DISC - DIA 2 IN - ZIRCONIA ALUMINA ABRASIVE - 36 GR" with a price of 21.39 USD. A shopping cart overlay is visible on the right side of the screen, containing one item: "11-02 Archive 13" with a quantity of 20 and a unit of measure of EA. The total amount in the cart is 27.80 USD. The "Checkout" button is highlighted in red in the cart overlay.

Shopping Cart:

Description	Qty	UOM
11-02 Archive 13	20	EA
Total Lines		1
Total Amount (USD)		27.80

Close Checkout

Review Requisition Information

- Review the header and line items for the requisition.

Checkout - Review and Submit
Review the item information and submit the req for approval.

Requisition Summary

Business Unit: DAGMT Dept of Administrative Svcs
 *Requester: Mazzaro/DAG-Mazzaro-Melissa
 *Currency: USD
 Requisition Name: Tech Supplies
 Priority: Medium
 Requisition Type: Requisition
 Dispatch Method: Email
 Obligator Amount: _____

Cart Summary: Total Amount: 329.50 USD
 Expand lines to review shipping and accounting details [Add More Items](#)

Requisition Lines

Line	Description	Item ID	Vendor	Quantity	UOM	Price
1	CISCO ADVANCE SERVICE ROUTER 12	OW_2157_727544	EPLUS TECHNOLOGY INC	2	Each	60.25

Shipping Line

*Ship To: 0649200033
 Address: 103 Capitol Ave, 5th Floor South, Proctoriant, Meriden, CT 06106
 Attention To: DAG MAZZARO MELISSA
 Date Date: _____

Accounting Lines

*Distribute By: 00 SpeedChart: _____

Accounting Lines

Line	Status	Dist Type	Location	Quantity	Percent	Merchandise Aid	GL Item
1	Open		ACORE	2	100.0000		NO SO STATE

Special Tech Supplies OFFICE DEPOT 2 Each 60.00

Total Amount: _____

Save and Submit

- Add comments and attachments to the **Requisition Comments and Attachments** section to either the lines or the header.
- Click the **Save & submit** button when ready to submit requisition for workflow approval.

The screenshot displays the Core-CT Requisition form. The top navigation bar includes 'Home', 'HRMS Worklist', 'FIN Worklist', 'Add to My Links', and 'Sign out'. Below the navigation, there are tabs for 'My HR', 'Finance', and 'Core-CT Help'. The 'Shipping Summary' section shows 'Ship To Location' as 0640000033, 'Address' as 165 Capitol Ave, 8th Floor South, Procurement, Hartford, CT 06106, and 'Attention To' as DAS-Marzano Melissa. The 'Requisition Comments and Attachments' section is highlighted with a red box and 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, the 'Save & submit' button is highlighted with a red box, along with 'Save for Later' and 'Add More Items' buttons.

Instructor Demonstration



Creating a Requisition Using the Catalog

- Create a new requisition.
- Click the Catalog link.
- Use the Catalog search feature to search for an item.
- Select an item to purchase.
- Checkout.



Job Aid: Searching the SES Catalog

Participant Exercise



Creating a Requisition Using the Catalog

- Complete the Pre-Exercise.
- Create a new requisition.
- Click the Catalog link.
- Use the Catalog search feature to search for an item.
- Select an item to purchase.
- Checkout.



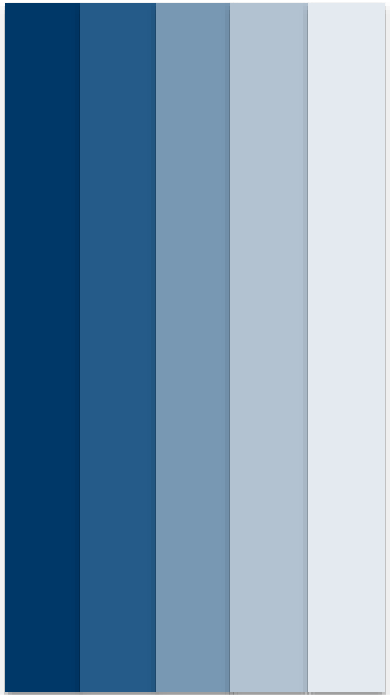
Job Aid: Searching the SES Catalog



WEB (Punch-Out)

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WEB (Punch-Out)



- The office supply supplier's (Suburban Stationers and Staples) site can now be accessed through the Core-CT WEB (Punch-Out) link.
- When creating a requisition using WEB (Punch-Out) only one supplier and no other type of procurement can be done on the requisition. Mixing requisition types with WEB will cause problems and is not supported by Core-CT.
- The WEB (Punch-Out) feature is only used for adding office supplies to a requisition.
- The dispatch method for WEB (Punch-Out) is EDX and should only be used with Suburban and Staples.

Define Requisition

- To create a requisition, navigate to the Requisition page: **Main Menu > Core-CT Financials > eProcurement > Requisition.**
- Enter the requisition Header, Line, Shipping and Accounting information (the **Buyer** field is required).
- The **P-Card** fields will display if a procurement card is assigned.
- Click the **OK** button.
- This information will move forward and be populated on each of the requisition lines.

My HR Finance Core-CT Help

Define Requisition

Business user: [dropdown] Date of Administrative Entry: [calendar]

Department: [dropdown] Requestion Name: [text]

Card Number: [text] Expiration Date: [calendar] Use Procurement Card

Priority: [dropdown] Requisition Type: [dropdown]

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 those fields.

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

Supplier: [dropdown] Category: [dropdown]

Request Location: [dropdown] **Buyer:** [dropdown]

Shipping Defaults

May To: [dropdown] Add One-Time Address

Order Date: [calendar] Address: [text]

Accounting Defaults

Item	Percent	Location	U.S. Inv.	Fund	Dept	Proj	Program	Account	Classification	Classification
		AC948	STATE		OPHARMED					

OK Cancel

Requisition Type

- Core-10 has been replaced by the term Requisition Type.

The screenshot displays the 'Define Requisition' form in the Core-CT system. The form includes fields for Business Unit (DASMT), Requester (MarzanoM), Currency (USD), Card Number, and Expiration Date. A dropdown menu for 'Requisition Type' is open, showing options: DAS-BID, ITD-10, Product Schedule, Requisition (highlighted), TSR-Equipment, and TSR-MACR. Below the form, there are sections for 'Default Options' (Default and Override), 'Line Defaults' (Supplier, Supplier Location, Buyer, Category, Unit of Measure), 'Shipping Defaults' (Ship To, Due Date, Attention), and 'Distribution Defaults' (SpeedChart).

Web Link



- Click the **Web** link to access the supplier sites.

The screenshot displays the Core-CT eProcurement system interface. The breadcrumb trail at the top reads: Favorites > Main Menu > Core-CT Financials > eProcurement > Requisition. The page title is "Create Requisition". The user is logged in as "Accenture-Rebecca Glazer". The main content area is titled "Add Items & Services" and contains several links: "Catalog" (Browse Catalogs), "ePro Services" (Request Services, Fixed Cost Service, Time and Materials, Variable Cost Service), "Web" (Browse Supplier Websites), "Templates" (Browse Company and Personal Templates), "Special Requests" (Create a non-catalog request), and "Favorites" (Browse Favorite Items and Services). The "Web" link is highlighted with a red rectangular box.

Supplier Sites

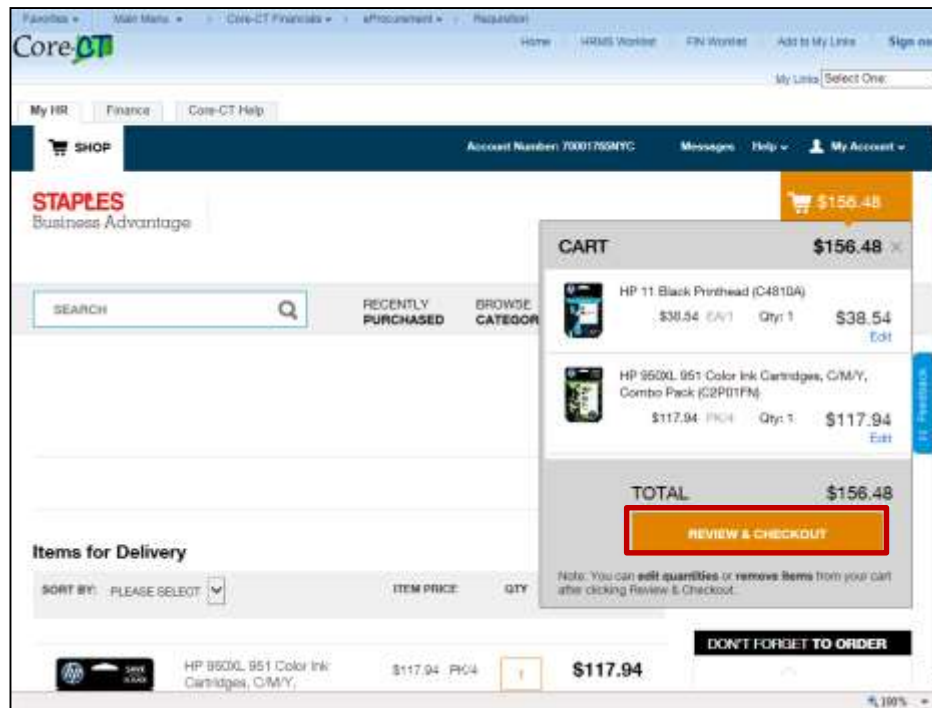
- Click one of the links to navigate directly to a supplier's site.
- There are two sites to choose from:
 - Staples
 - Suburban Stationers

The screenshot shows the Core-CT eProcurement interface. At the top, there are navigation links for Home, HRMS Worklist, FIN Worklist, Add to My Links, and Sign out. Below this, there are tabs for My HR, Finance, and Core-CT Help. The main content area is titled 'Create Requisition' and includes a 'Define Requisition' button, a 'Home' icon, and a 'Checkout' button. A table titled 'Web' is displayed with the following data:

Merchant	Description
 Staples Business Advantage	Direct Connect Punch Out (Supplier ID: 0000120553, Location: MAIN)
 Suburban Stationers	Direct Connect Punch Out (Supplier ID: 0000010009, Location: MAIN)

Select and Add an Item

- Click the **Add** button to add an item to the shopping cart.
- Click the **Review & Checkout** button to review the order.
- Click the **Submit Order** button to bring the items back to the eProcurement requisition in Core-CT.
 - The end-user is still on the Supplier's website until the Submit Order button is clicked.



Add More Items

- To add additional items to the requisition, click the **Add More Items** button.

Checkout - Review and Submit

Review the item information and submit the req for approval.

Requisition Summary

Business Unit: CASM | Dept of Administrative Servs | Requisition Name: | Priority: Urgent | Requisition Type: Requisition | Colleague Amount: | Requested: 1/24/2014 | DWS-Marcus Malina | Currency: USD

Cart Summary: Total Amount: \$26.48 (19)

Click here to review shipping and handling details. **Add More Items**

Line	Description	Item ID	Vendor	Quantity	UCM	Price
1	HP 113 Basic Notebook (STANDARD)		STAPLES CONTRACT B COMMERCIAL, INC	1	Each	26.58
2	HP W700, 651, Carbon, Cartridge		STAPLES CONTRACT B COMMERCIAL, INC	1	Pack	117.90

Shipping Summary

Ship To Location: 00-000000
Address: 105 Capitol Ave, 5th Floor South, Proctorium, HARTFORD, CT 06183
Attention To: Comments: DWS-Marcus Malina

Requisition Comments and Attachments

Enter requisition comments

Send to Supplier Show as Receipt Show as Watcher

Approval Justification

Enter approval justification for this requisition

Save & Submit | Save for Later | **Add More Items**

Select the Supplier Site

- When navigating back to the Add Items and Services page, only the WEB (Punch-Out) option is available.
- The same supplier must be selected to add additional items to the requisition.

The screenshot shows the 'Create Requisition' page in the Core-CT system. The page is titled 'Create Requisition' and includes a navigation bar with 'My HR', 'Finance', and 'Core-CT Help'. The user is logged in as 'DAS-Marzano Melissa'. The page displays a table of suppliers under the 'Web' category. A red box highlights the 'STAPLES Business Advantage' and 'Suburban' entries.

Merchant	Description
STAPLES Business Advantage	Direct Connect Punch Out (Supplier ID: 0000120553, Location: MAIN)
Suburban	Direct Connect Punch Out (Supplier ID: 0000010009, Location: MAIN)

Review Requisition Information

- Review the header and line items on the requisition.

Checkout - Review and Submit
Review the item information and submit the req for approval.

Requisition Summary

Business Unit: DAGMT Dept of Administrative Svcs
 *Requester: MazzaroW DAG-Mazzaro-Melissa
 *Currency: USD

Requisition Name: Tech Supplies
 Priority: Medium
 Requisition Type: Requisition
 Dispatch Method: Email
 Obligator Amount:

Cart Summary: Total Amount: 329.50 USD
 Expand lines to review shipping and accounting details [Add More Items](#)

Requisition Lines

Line	Description	Item ID	Vendor	Quantity	UOM	Price
1	CISCO ADVANCE SERVICE ROUTER 12	DW_2157_727544	EPLUS TECHNOLOGY INC	2	Each	60.25

Shipping Line

*Ship To: 0649200031
 Address: 103 Capitol Ave, 5th Floor South, Proctoriant, Meriden, CT 06106
 Attention To: DAG MAZZARO MELISSA
 Date Date:

Accounting Lines

*Distribute By: 00 SpeedChart:

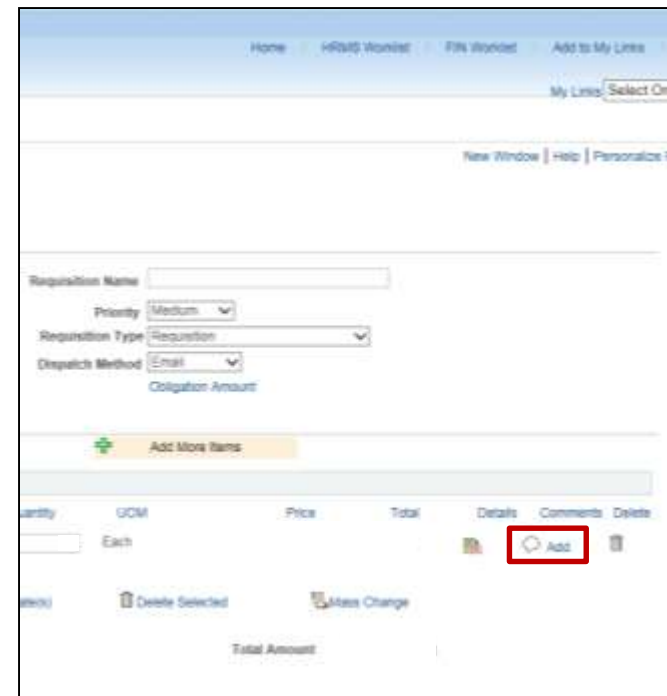
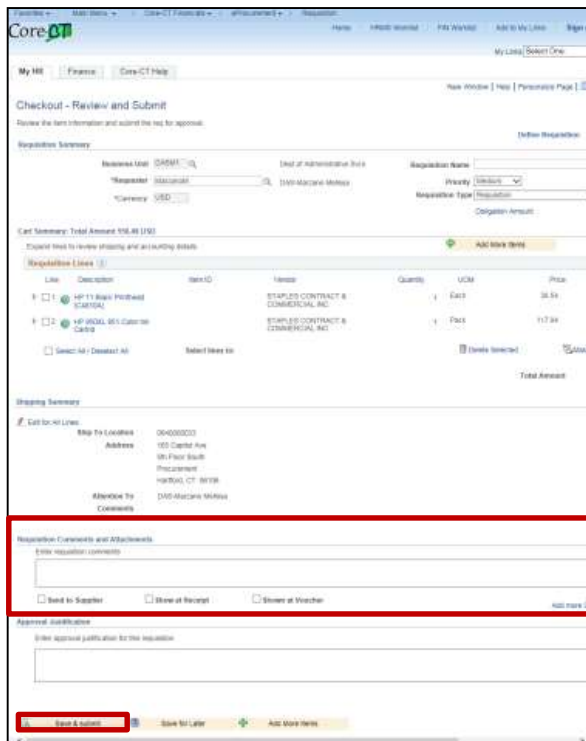
Line	Status	Dist Type	Location	Quantity	Percent	Merchandise Aid	GL Item
1	Open		ACORE	2	100.0000		NO SO STATE

Special Tech Supplies OFFICE DEPOT 2 Each 60.00

Total Amount:

Save and Submit

- Add comments and attachments to the **Requisition Comments and Attachments** section to either the lines or the header before sending for approval.
- Clicking the **Send to Supplier** checkbox on the Header or Line comments will display the comments to the Supplier on the Purchase Order. Only the first 34 characters in the line comment section will be sent when the box is checked.
- Click the **Save & submit** button when finished.



Instructor Demonstration



Create a Requisition Using the WEB (Punch-Out)

- Create a new requisition.
- Click the WEB (Punch-Out) link to navigate to the supplier's site through Core-CT.
- Select an item to purchase.
- Checkout



Job Aid:

- **Staples eProcurement Quick Reference Guide**
- **Suburban eProcurement Quick Reference Guide**

Participant Exercise



Create a Requisition Using the WEB (Punch-Out)

- Create a new requisition.
- Click the WEB (Punch-Out) link to navigate to the supplier's site through Core-CT.
- Select an item to purchase.
- Checkout.



Job Aid:

- Staples eProcurement Quick Reference Guide
- Suburban eProcurement Quick Reference Guide



Review and Q&A

eProcurement 9.2

Questions?

Q & A

Summary



Let's review our Learning Objectives:

You should now be able to:

- Demonstrate how to add items to a requisition through the Catalog feature.
- Describe how to add items to a requisition through the WEB (Punch-Out) feature.
- Explain how to use the Mass Change link.
- Describe how to add a P-Card to a requisition.

Congratulations!

You have now completed the eProcurement course!

Next Steps:

- Fill out the course evaluation.
- Take screenshots of favorites, run controls, templates, queries, and supplier sites at your desk.
- Go Live is planned for March 2017
 - For support of Core-CT 9.2 use Footprints
 - Last day to get requisitions created, approved and sourced:
 - Tuesday, March 7, 2017 close of business

