



BITS-Funded Assets ITD-10 Requisition

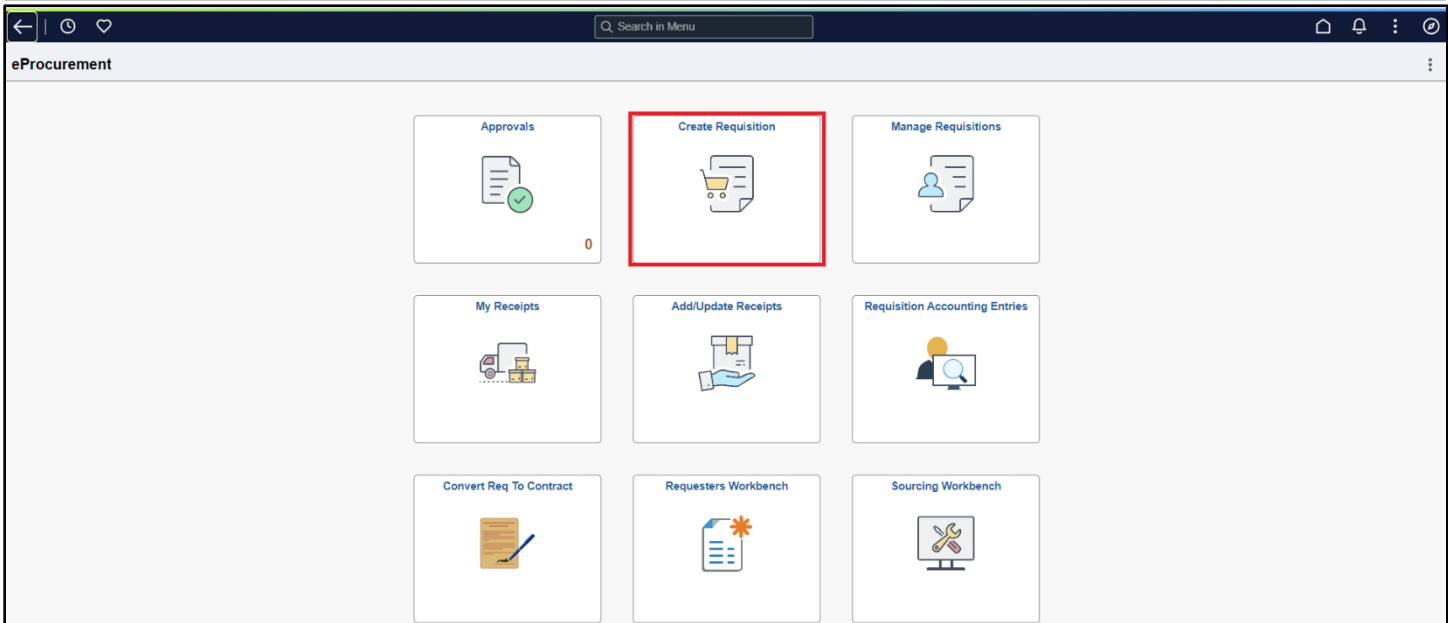
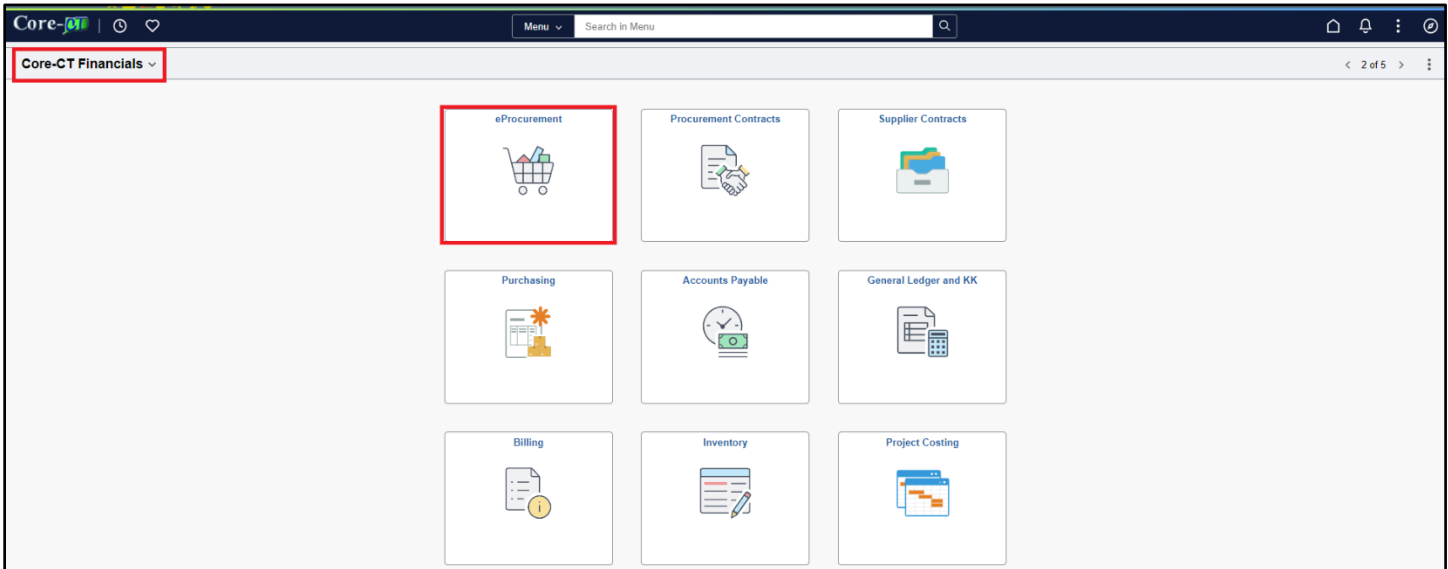
Use this job-aid for IT Assets being acquired with BITM1 (DAS BITS) funding.

Navigation:

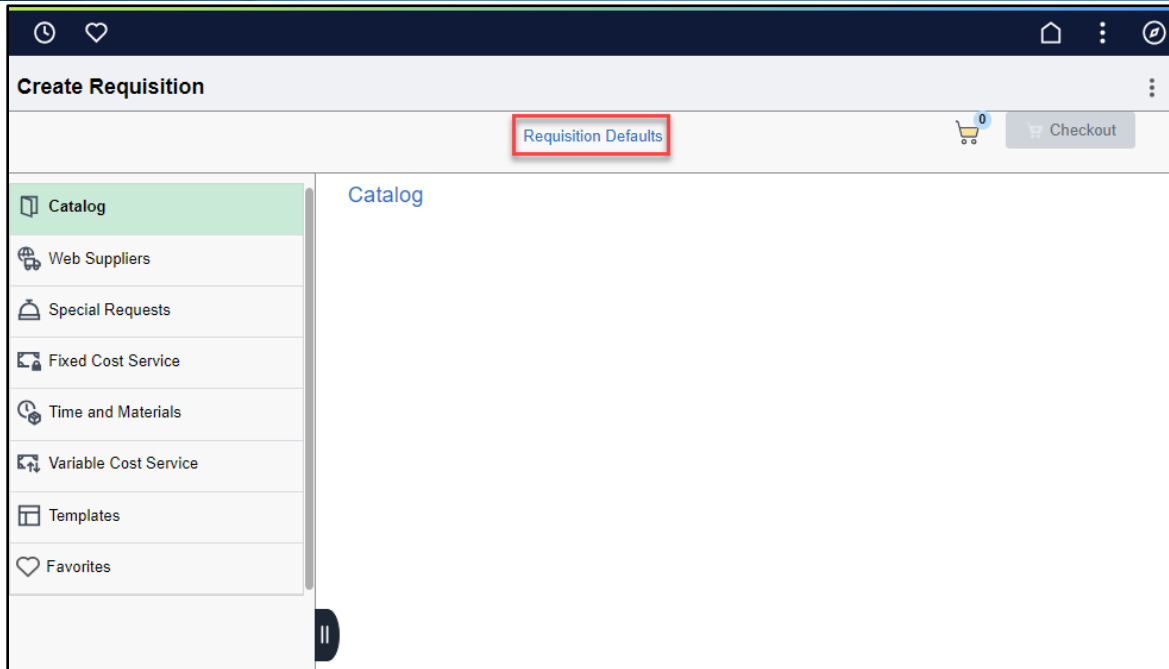
Select **Core-CT Financials**

Click **eProcurement** tile

Click **Create Requisition** tile



Click **Requisition Defaults**



- Enter **Requisition Name**
 - Use prefix of BIT plus your 3 letter Agency acronym, then a generic description of your items (Example: BIT DAS Laptops)
- Select **Requisition Type**
 - **ITD-10**
- In the **Line Defaults** section, enter **Supplier, Category, Unit of Measure, and Buyer.**
- In the **Shipping Defaults** section, ensure the **Ship To** default is correct, or select appropriate location from the lookup icon prompt table.
- **Location:** Enter or select the AM Location from the look up icon prompt table (they start with A (for Assets) plus the 3 letter Agency acronym).
- Enter **DAS BITS** distribution values assigned to the agency (**DEPT ID, appropriate asset Account Code**).



Requisition Defaults

Header Defaults

Business Unit: DASM1
 Requirer: 085741
 DAS-
 Priority: Medium
 Currency: USD

Requisition Name: BIT DAS Laptops
 Use Procurement Card: No
 Card Number:
 Expiration Date:
 Requisition Type: ITD-10
 Dispatch Method: Print
 Obligation Amount:

Line Defaults

Supplier ID: 0000064731
 Supplier Location: MAIN
 Buyer: 085741
 Category: 00000000
 Unit of Measure: EA

Shipping Defaults



Ship To: 0640000558
 Attention:
 Add One Time Address
 Due Date:

Distribution Defaults

SpeedChart:

Chartfields1 Chartfields2 Chartfields3 Details Asset Information Show All

Distribution Line	Percent	Location	GL Unit	Account	Fund	Dept	SID	Program	Bud Ref
1	100	ACORE	STATE			DAS23920			

- Click on the **Asset Information** Tab
- Enter **AM Business Unit: BITM1**
- Enter **Profile ID:** Select the appropriate value.
 - Click  to search.
- Click 

Distribution Defaults

SpeedChart:

Chartfields1 Chartfields2 Chartfields3 Details **Asset Information** Show All

AM Business Unit: BITM1
 Profile ID: CNTRLITEM
 Capitalize: Non Cap
 Cost Type:
 Description:

- This will bring you to the **Create Requisition** page.
- Use **Special Requests** for ordering *commodities* only.



The screenshot shows the 'Create Requisition' interface with the 'Special Requests' section selected in the left-hand navigation menu. The form is titled 'Special Requests' and includes the following fields and sections:

- Item Information:** *Item Description, *Price, *Quantity, *Category (00000000), Due Date, *Currency Code (USD), *Unit of Measure (EA).
- Supplier Information:** Supplier ID (0000064731), Supplier Location (MAIN), Supplier Item ID.
- Manufacturer Information:** Manufacturer ID, Manufacturer's Item ID.
- Comment:** Comment Text, Send Comment to Supplier, Show Comment on Receipt, Show Comment on Voucher.

An 'Add to cart' button is located at the bottom left of the form.

- Use **Fixed Cost** or **Variable Cost** when procuring **Services Only**.
- Use **Fixed Cost Service** when you know the total value of the services.
- **Service Description, Price, Currency Code, Category, Start Date, End Dates, Supplier ID, and Quote Number,** are needed to complete the request.
- Serial numbers and other useful info are entered in the **Comment Text** box.

The screenshot shows the 'Create Requisition' interface with the 'Fixed Cost Service' section selected in the left-hand navigation menu. The form is titled 'Fixed Cost Service' and includes the following fields and sections:

- Service Information:** *Service Description, *Price, *Category (00000000), Start Date, End Date, *Currency Code (USD).
- Supplier Information:** Supplier ID (0000064731), Supplier Location (MAIN), Quote Number, Quote Date.
- Comment:** Comment Text, Send Comment to Supplier, Show Comment on Receipt, Show Comment on Voucher.

An 'Add to cart' button is located at the bottom left of the form.



- Use **Variable Cost Service** when you don't know the total value of services until invoiced. (A PO change order will be required at that time).
- **Service Description, Rate, Currency Code, Number of Units of Work, Unit of Work, Category, Start Date, End Date, Supplier ID, and Quote Number** are needed to complete the request.
- Serial numbers and other useful info are entered in the **Comment Text** box.

The screenshot shows the 'Create Requisition' interface for 'Variable Cost Service'. The form is divided into several sections: 'Service Information', 'Supplier Information', and 'Comment'. The 'Service Information' section includes fields for Service Description, Rate, Number of Units of Work, Category, Start Date, End Date, Currency Code, and Unit of Work. The 'Supplier Information' section includes fields for Supplier ID (EPLUS TECHNOLOGY INC), Supplier Location, Quote Number, and Quote Date. The 'Comment' section includes a large text area for Comment Text and three checkboxes: 'Send Comment to Supplier', 'Show Comment on Receipt', and 'Show Comment on Voucher'. An 'Add to cart' button is located at the bottom left of the form.

- Use **Time and Materials** when ordering both *services* and *commodities*.
- **Service Description, Rate, Currency Code, Number of Units of Work, Unit of Work, Category, Start Date, End Date, Supplier ID, and Quote Number** are needed to complete the request.
- Serial numbers and other useful info are entered in the **Comment Text** box.



Create Requisition

Requisition Defaults

0 Checkout

Time and Materials

Time

Service Information

*Service Description

*Rate

*Number of Units of Work

*Category 00000000

Start Date

*Currency Code USD

*Unit of Work EA

End Date

Supplier Information

Supplier ID 0000064731 EPLUS TECHNOLOGY INC

Supplier Location MAIN

Quote Number

Quote Date

Comment

Comment Text

Send Comment to Supplier
 Show Comment on Receipt
 Show Comment on Voucher

Materials

Item Information

*Item Description

*Price

*Quantity

*Category 00000000

Start Date

*Currency Code USD

*Unit of Measure EA

End Date

Supplier Information

Supplier ID 0000064731 EPLUS TECHNOLOGY INC

Supplier Location MAIN

Supplier Item ID

Manufacturer Information

Manufacturer ID

Manufacturer's Item ID

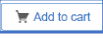
Comment

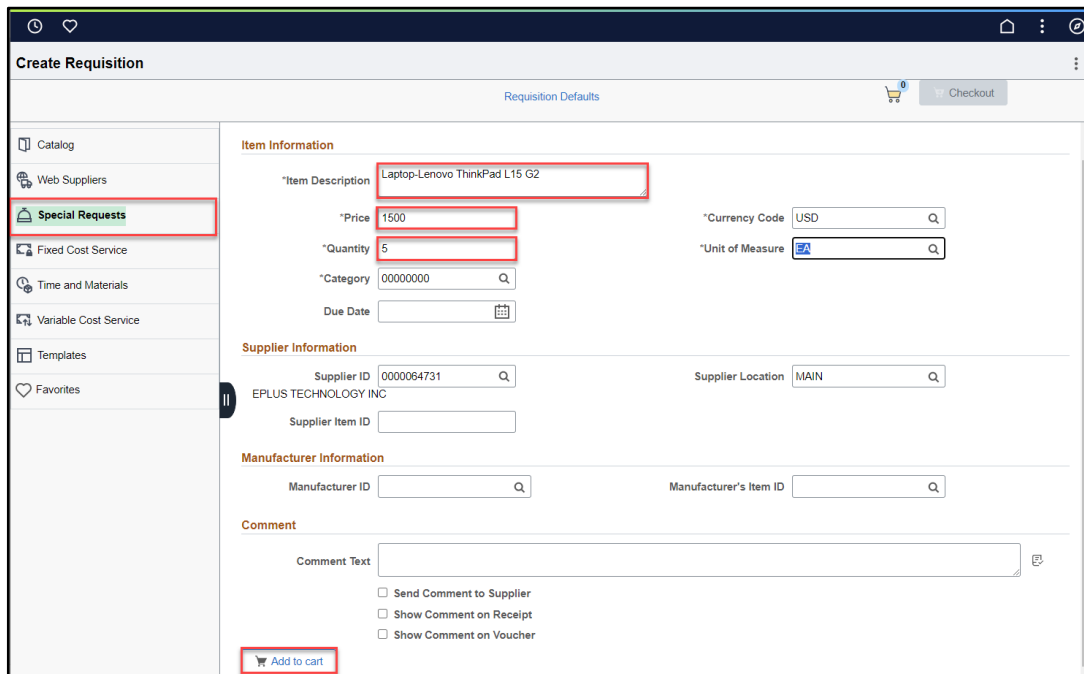
Comment Text


Send Comment to Supplier
 Show Comment on Receipt
 Show Comment on Voucher

- The example below is using **Special Requests** (ordering **commodities** only).
- Enter the Item description using the following format: *Type of Item [Hyphen]Manufacturer [Space]Model.*



- **Example:** Laptop-Lenovo ThinkPad L15 G2
 - **Note: Do NOT** use Commas (,) in the description. It will cause problems during the Physical Inventory Process.
- Enter the **Quantity**.
 - Enter the **Price** of the item(s).
 - Click 
 - Repeat as needed for each Line Item.



- Click  on the page, or in the shopping cart once all items have been entered.
- The **Checkout** page displays.
- Click the arrow to the right of the line description to display and review the **Schedule Details** and **Line Details**, which should default from the **Requisition Defaults** page.



Create Requisition

Continue Shopping Save Submit

Checkout Requisition Defaults Order Total 7,500.00 USD

Requisition Summary

Business Unit DASM1 Dept of Administrative Svcs
 Requisition Name BIT DAS Laptops
 Requisition Type Requisition
 Requester 085741 DAS-
 Currency USD
 Priority Medium
 Dispatch Method Print
 Obligation Amount
 Card Number
 Expiration Date
 Use Procurement Card No

Justification Comments

Requisition Lines Overview

Select All Actions

Line	Description	Quantity	Unit of Measure	Price	Currency	Total	Actions
1	Special Request Laptop-Lenovo ThinkPad L15 G2 Item ID Supplier EPLUS TECHNOLOGY INC	5	EA	1500.00	USD	7,500.00 USD	ScheduleDetails

Order Total 7,500.00 USD

- Click the **Line Details** tab.
- Enter the **Contract ID** or update the **Purchasing Authority** as necessary.
- In this example, a Contract was used so the **Purchasing Authority** remains Contracts.
- Click **Done**

Cancel Requisition Line Details Done

Order Total 5000.00 USD

Line 1 1/1

Schedule Details Line Details

Item Summary

Item Additional Information

Device Tracking No
 Stockless Item No
 RFQ Required No
 Inspection Required No
 Amount Only No
 Zero Price Indicator No

Contract Information

Use Contract if Available No
 Contract ID
 Contract Line
 Category Line
 Contract Version
 Contract Details

Supplier Information

Supplier ID 0000064731
 Supplier Location MAIN
 Supplier Item ID
 Supplier Name EPLUS TECHNOLOGY INC
 Supplier's Catalog Number
 Item Supplier Priority

Manufacturer Information

Manufacturer ID
 Manufacturer's Item ID
 UPN Type
 UPN ID
 Procurement Group ID
 Manufacturer
 Primary Unit No
 Unit Allocation Qty

> Sourcing Controls
 State of CT Custom Fields

Purchasing Authority Contracts



- Add relevant comments and justification as applicable.

Create Requisition

Checkout Continue Shopping Save Submit

Requisition Defaults Order Total 5,000.00 USD

▼ Requisition Summary

Business Unit: DASM1 Dept of Administrative Svcs
Requisition Name: BIT DAS Laptops
Requester: USD
Priority: Medium
Requisition Type: ITD-10
Dispatch Method: Email
Obligation Amount:
Card Number:
Expiration Date:
Use Procurement Card: No

Header Comments

▼ Justification Comments

▼ Requisition Lines Overview

Line	Item	Quantity	Unit of Measure	Price	Currency	Total
Line 1	Special Request Laptop-Lenovo ThinkPad L15 G2	10	EA	500.00	USD	5,000.00 USD

Supplier: EPLUS TECHNOLOGY INC
 Line Comments Delete

Order Total 5,000.00 USD

- Click **Header Comments** button, to bring up the **Requisition Header Comments and Attachments** dialogue box.
- Click **Add Attachments** button to add pertinent documentation.

Cancel **Requisition Header Comments and Attachments** Done

Comments + -

Use Standard Comments

Comment Text

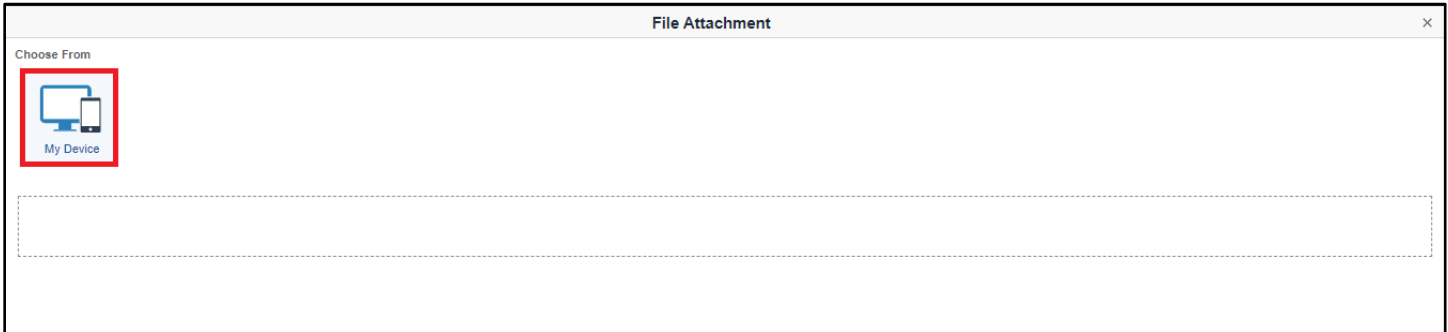
Send to Supplier No

Show at Receipt No

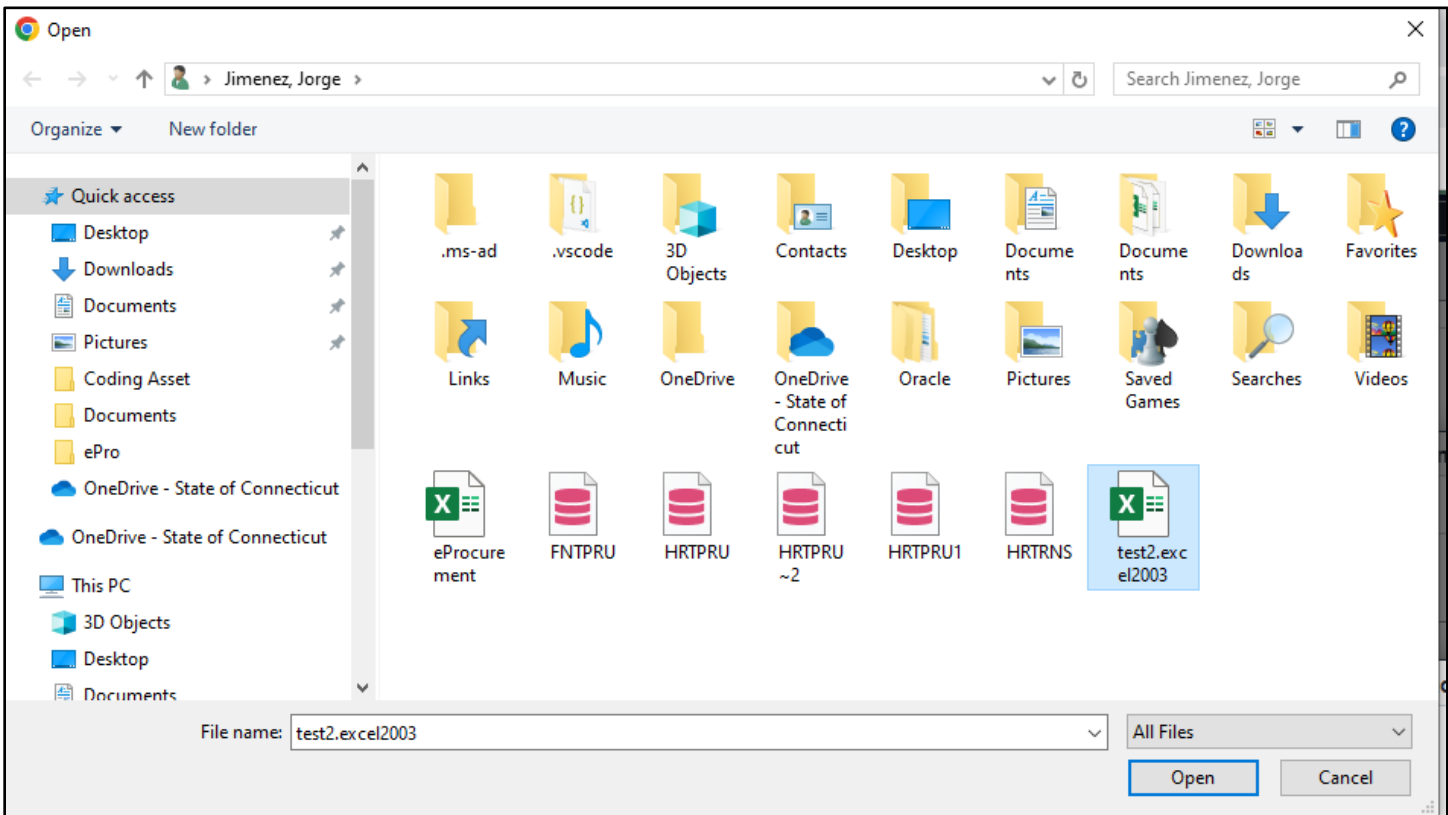
Show at Voucher No



➤ Click **My Device**

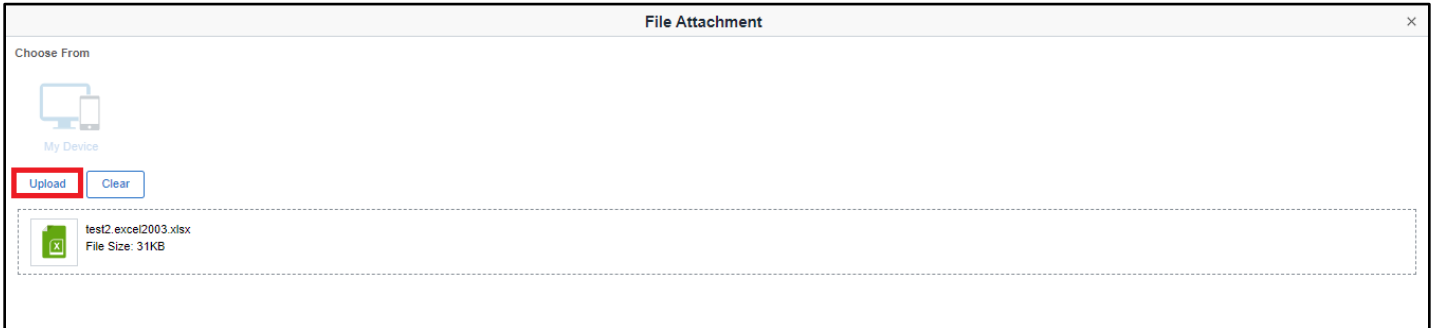


➤ Select the file to be Uploaded and Click **Open**

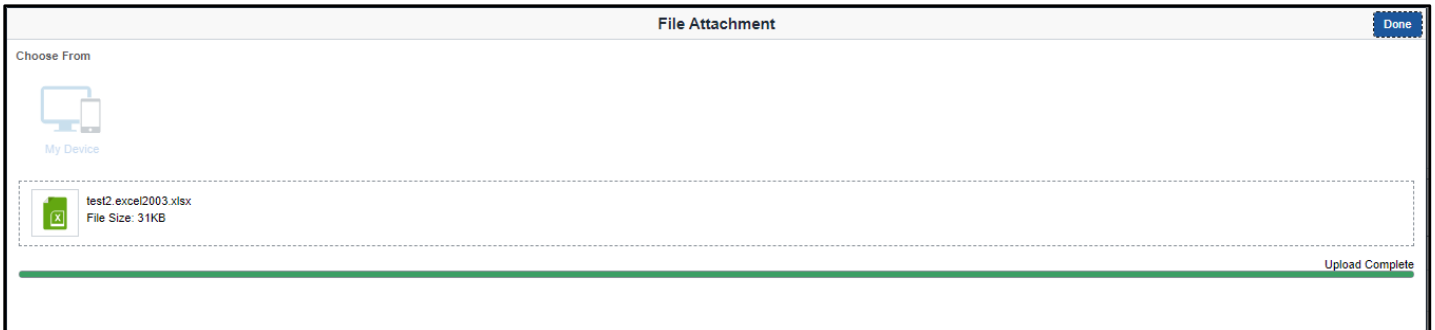




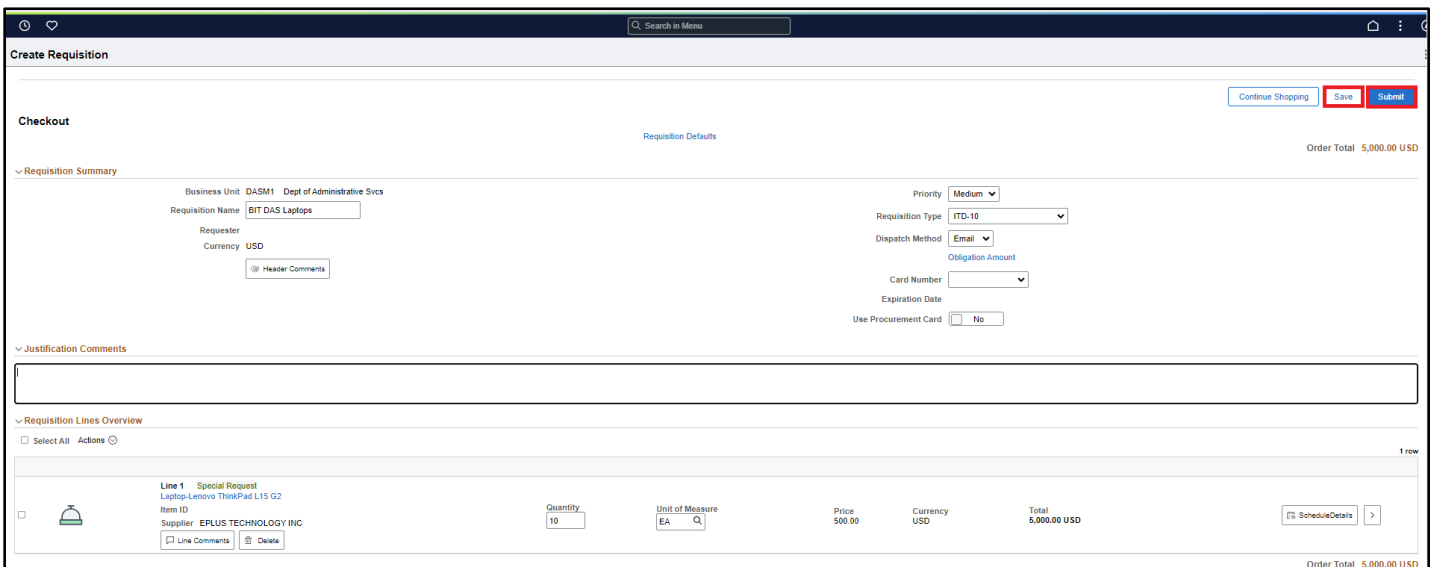
➤ Click **Upload**



➤ When the file is Uploaded, Click **Done**.



- The Requisition is ready to be reviewed and submitted.
- Click **Save** to save the Requisition so it can be submitted later. Click **Submit** to complete the order and route for Approval.



➤ The **Submit** button prompts a warning message stating the requisition type cannot be changed once saved.



➤ Click

A saved Requisition Type can't be changed. Are you sure you want to save a Requisition Type of REQ?
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 Requisition confirmation page displays.
- If additional (*ad-hoc*) approvals are required, Click the **View Approval Chain** button.
- Use the '+' to the right of the Approval step where the approver should be added.

The screenshot shows the 'Checkout Confirmation' page for a requisition. The 'Requisition Details' section includes: Business Unit: DASM1, Requisition ID: 0000008884, Requisition Name: BITS Laptops 2, Last Modified Date: 05/16/2024 9:01:34AM, Status: Pending Approval, Total Lines: 1, Total Amount: 6,000.00 USD, and Budget Checked Status: Not Checked. A 'View Approval Chain' button is highlighted with a red box. The 'Next Steps' section includes: Edit this Requisition, My Requisitions, and Create Requisition.

The screenshot shows the 'Approval Flow' page for the requisition. It displays three approval steps: 'Req Amount Approval' (Pending), 'Req Budget Approval' (Awaiting Further Approvals), and 'Req Purchasing Approval' (Awaiting Further Approvals). Each step has a 'Start New Path' button and a 'Multiple Approvers' section. In the 'Req Amount Approval' section, two approver rows are shown: 'REG AMT APPROVER 1' (Pending) and 'REG AMT APPROVER 2' (Not Routed). Red boxes highlight the '+' icons to the right of these rows, indicating where to click to add more approvers.

- Enter the **User ID** of the additional approver.
- Click



Insert additional approver or reviewer ✕

User ID

Approver
 Reviewer

➤ Requisition will show on the respective approvers' **Approvals** page.

Pending Approvals				
View By	Type	Requisition		
All	26			
Requisition	20			
Requisition	64.00 USD	DASM1 / 0000005804 / DAS-Marzano Melissa / Test Approval 0311_1	GRAINGER INDUSTRIAL SUPPLY	Req Amount Approver 1 Routed 03/11/2024
Requisition	231.00 USD	DASM1 / 0000005805 / DAS-Marzano Melissa / Test Approval 0311_2	C & C JANITORIAL SUPPLIES INC	Req Amount Approver 1 Routed 03/11/2024
Requisition	1,125.00 USD	DASM1 / 0000005806 / DAS-Marzano Melissa / Test Req for Approval 0311	C & C JANITORIAL SUPPLIES INC	Req Amount Approver 1 Routed 03/11/2024
Requisition	1.00 USD	MHAM1 / 0000038272 / MHA-Young Barbara / FINEPRO0149 - DAS BID	SUBURBAN STATIONERS INC	DAS-BID Approver Routed 03/18/2024
Requisition	100.00 USD	AESM1 / 0000005644 / ECD-Flanagan Jessica R / 0000005644	TOWN OF ANDOVER	DAS-BID Approver Routed 04/10/2024
Requisition	21,000.00 USD	DASM1 / 0000005876 / DAS-Marzano Melissa / Test Req Notification 0429	EPLUS TECHNOLOGY INC	Req Amount Approver 1 Routed 04/29/2024
Requisition	21,000.00 USD	DASM1 / 0000005877 / DAS-Marzano Melissa / Test Req Noti 0429	EPLUS TECHNOLOGY INC	Req Amount Approver 1 Routed 04/29/2024
Requisition	5,000.00 USD	DASM1 / 0000005881 / DAS-Marzano Melissa / BIT DAS Laptops	EPLUS TECHNOLOGY INC	Req Amount Approver 1 Routed 05/15/2024
Requisition	5,000.00 USD	DASM1 / 0000005884 / DAS-Marzano Melissa / BITS Laptops 2	EPLUS TECHNOLOGY INC	Req Amount Approver 1 Routed 05/16/2024



- Once approved, the Requisition is ready to be budget checked, sourced to a Purchase Order, and dispatched via BATCH processes.

The screenshot displays a requisition system interface. The main window shows a requisition for 'BITS Laptops 2' with a total amount of 5,000.00 USD, approved on 05/16/2024. The requisition details include Business Unit (DASM1), Routed Date (May 16, 2024), and a list of items: 'Laptop-Lenovo ThinkPad L15 G2' with a quantity of 1 and a unit price of 5,000.00 USD. An 'Approval Chain' pop-up window is open, showing the following steps:

- Amount Approval:** Approved for 'BITS Laptops 2'.
 - Req Amount Approval: Approved by DAS REQ AMT APPROVER 1 on 05/16/24 9:48 AM.
 - Req Amount Approval: Approved by DAS REQ AMT APPROVER 2 on 05/16/24 9:48 AM.
- Req Budget Approval:** Approved for 'BITS Laptops 2'.
 - Req Budget Approval: Approved by DAS REQ BUDGET APPROVER on 05/16/24 9:48 AM.
- Req Purchasing Approval:** Approved for 'BITS Laptops 2'.
 - Req Purchasing Approval: Approved by DAS REQ PURCH APPROVER on 05/16/24 9:48 AM.

The background interface also shows 'Obligation Amount 0', 'Oblig Start 05/16/2024', 'Oblig End 06/30/2024', 'Contract ID 19PEX0046AJ', and 'Purchasing Authority CONT'.



Guidance to BITS Approval of Services and Commodities

IT Items/Services	BITS Approval?
Advertising/Postings on Job Boards (HealthECareers, Dice) – posting available jobs.	No
APC Batteries/Cartridges	No
Barcode Scanners	Yes
Cables/Adapters/Connectors	No
Cleaning Cartridges	No
Digital Subscriptions – Newspapers	No
Document Scanners	No
E-Subscriptions	Yes
External Drives	Yes
Flash Drives	Yes
Flatbed/Document Scanners	Yes
Hardware	Yes
Hardware Maintenance	Yes
Keyboards	No
Legal File Software Maintenance	Yes
LTO Ultrium Tapes	No
Memory Storage Cards used for Cameras, Digital Cameras	Yes
Modems	Yes
Monitors	Yes
On-Line Subscriptions Data Bases – West Law, Lexis Nexis etc.	Yes
Promotional Flash Drives	Yes
Software	Yes
Software Maintenance	Yes
Software Maintenance for a printer	Yes
Software Subscriptions	Yes
Survey Monkey Subscription	Yes
UPS/Power/Surge	Yes
Web Hosting Services	Yes