



Convert Requisition to a Procurement Contract

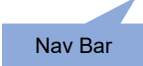
Use this job-aid to convert a DAS-BID, POS, PSA, or standardization transaction Requisition to a contract.

Navigation:

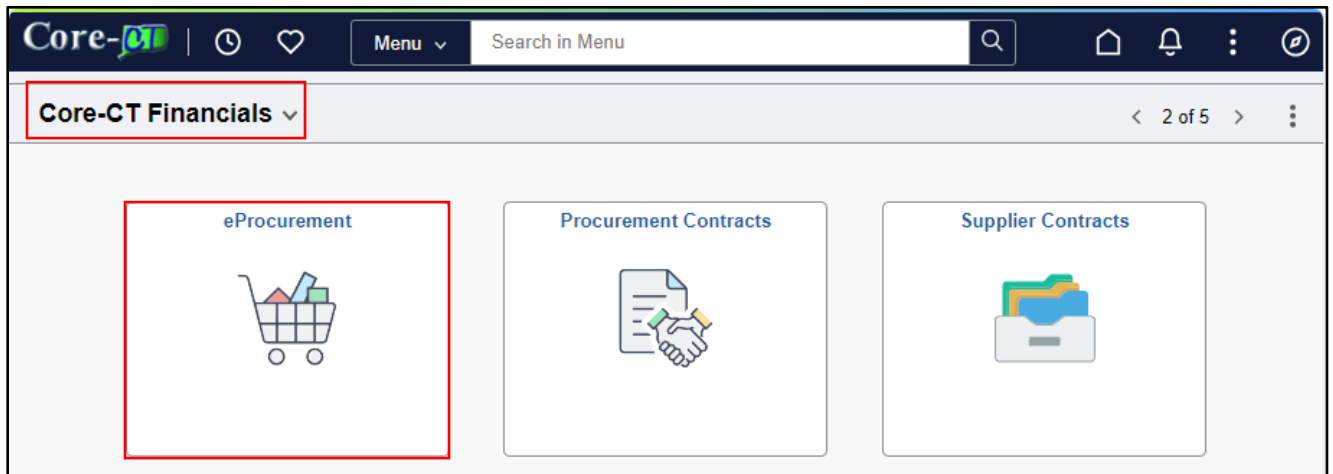
Nav Bar > Menu > Core-CT Financials > eProcurement > Convert REQ to Contract

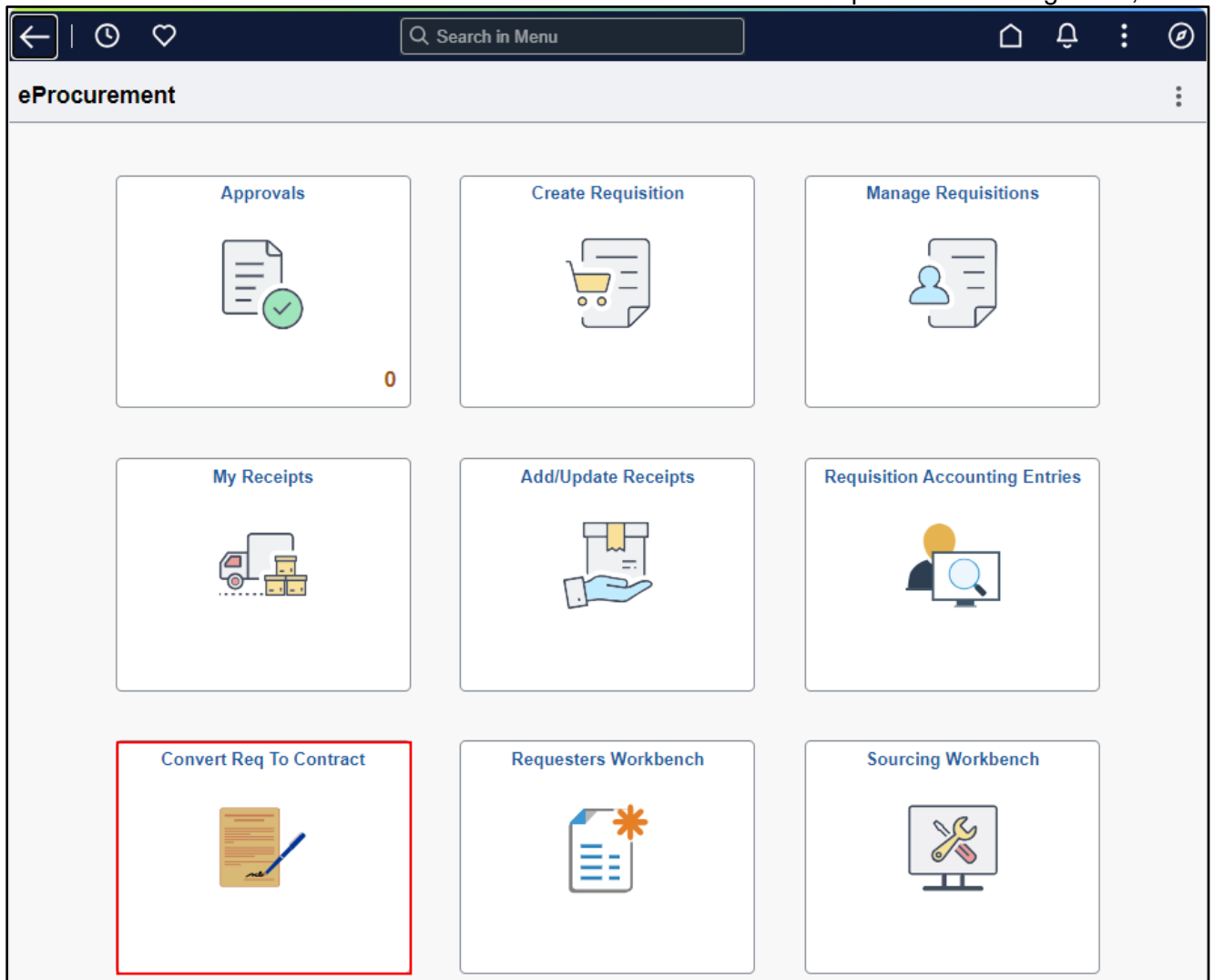


OR



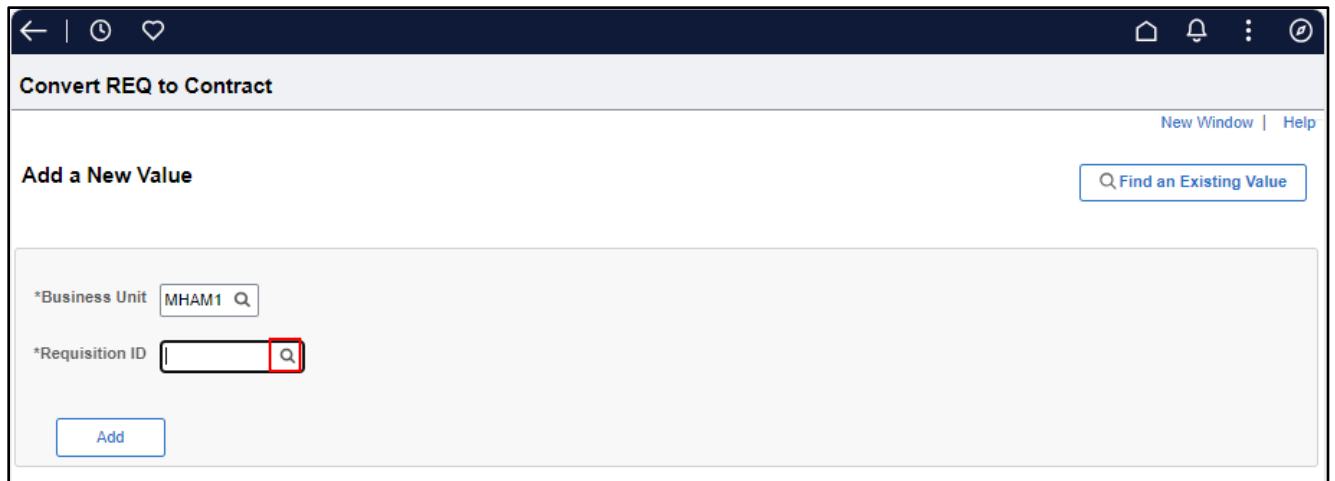
- Select **Core-CT Financials**
- Click **eProcurement** tile
- Click **Convert Req to Contract** tile





Procedure:

1. Enter the **Business Unit**



Convert REQ to Contract

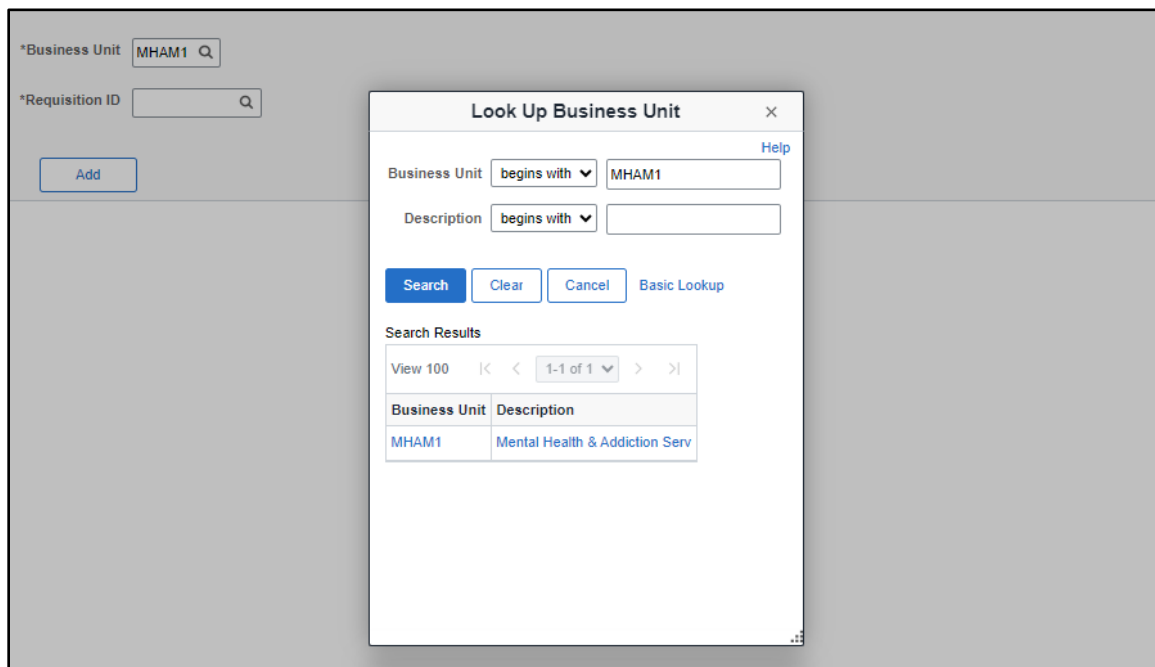
New Window | Help

Add a New Value [Find an Existing Value](#)

*Business Unit

*Requisition ID

2. Click on the **lookup up magnifying glass** and a window will pop up with all the business unit requisitions that are eligible to convert.



*Business Unit

*Requisition ID

Look Up Business Unit [Help](#)

Business Unit

Description

[Basic Lookup](#)

Search Results

View 100 |< < 1-1 of 1 > >|

Business Unit	Description
MHAM1	Mental Health & Addiction Serv

3. Click on the requisition that you need to convert, and it will populate in the **Requisition ID** field.

4. Click the **Add** Button

The screenshot shows a web application interface titled "Convert REQ to Contract". At the top right, there are links for "New Window" and "Help". Below the title, there is a section "Add a New Value" with a search button labeled "Find an Existing Value". The main form area contains two input fields: "*Business Unit" with the value "MHAM1" and "*Requisition ID" with the value "000032138". Below these fields is a blue "Add" button, which is highlighted with a red rectangle.

5. The contract ID & Suffix will default from the requisition into the next screen for conversion. Add the **Supplier ID, Begin and Expire Dates, & Contract Type**
6. **Uncheck** the Open Item Check Box
7. Click on the **Line Details Link**. The lines on the requisition should display.

The screenshot shows the "Requisition Selection" screen. It displays the following information: Business Unit: MHAM1, Requisition ID: 000032138, Requisition Type: POS - Purchase of Service, and Server Name: PSUNX. There is a "Create Contract" button. Below this is a table with the following columns: Supplier ID, Contract ID, Contract ID Suffix, Master Flag, Begin Date, Expire Date, State Identified Contract Type, Open Item, Line Details, and Awarded Amount. The first row of the table is highlighted with a red border and contains the following data: 1, 0000011297, 18MHA32138, POS01, 05/01/2018, 04/30/2019, PON Noncompetitive, and an unchecked checkbox. The "Line Details" link in the highlighted row is also highlighted with a red border. At the bottom of the screen, there are buttons for "Save", "Refresh", "Add", and "Update/Display".

	-Supplier ID	Contract ID	Contract ID Suffix	Master Flag	-Begin Date	Expire Date	-State Identified Contract Type	Open Item	Line Details	Awarded Amount		
1	0000011297	18MHA32138	POS01	<input type="checkbox"/>	05/01/2018	04/30/2019	PON Noncompetitive	<input type="checkbox"/>	Line Details		+	-

8. Add the **Awarded Amounts** and Click **OK**.

The screenshot shows a window titled "Line details" with a close button (X) in the top right corner. Below the title bar, there is a "Help" link. The main content area displays the following information:

Business Unit: MHAM1 Requisition ID: 0000032138
 SetID: STATE

Below this information is a search bar with a magnifying glass icon and a dropdown menu showing "1-1 of 1". To the right of the search bar is a "View All" link.

Line Number	Description	Awarded Amount	Unit of Measure
1	Treatment Pathways Program (STR Grant)	100000.000	EA

At the bottom of the window are three buttons: "OK", "Cancel", and "Refresh".

9. Click the **Save** Button

10. Click on the **Create Contract** link.

The screenshot shows a window titled "Convert REQ to Contract". Below the title bar, there is a "Requisition Selection" section with the following information:

Business Unit: MHAM1
 Requisition ID: 0000032138 Requisition Type: POS - Purchase of Service
 Server Name: PSUNX

To the right of the server name is a search icon and a "Create Contract" button, which is highlighted with a red box.

Below this information is a search bar with a magnifying glass icon and a dropdown menu showing "1-1 of 1". To the right of the search bar is a "View All" link.

-Supplier ID	Contract ID	Contract ID Suffix	Master Flag	-Begin Date	Expire Date	-State Identified Contract Type	Open Item	Line Details	Awarded Amount		
0000011297	18MHA32138	POS01	<input type="checkbox"/>	05/01/2018	04/30/2019	PON Noncompetitive	<input type="checkbox"/>	Line Details		+	-

At the bottom of the window are four buttons: "Save", "Refresh", "Add", and "Update/Display".

11. A message will display. Click **Yes** if you are ready to continue and **Yes** that you would like to wait until the Requisition is converted to Contract.

12. If the contract is being awarded to multiple suppliers, additional rows can be added by clicking on the plus sign **+** at the end of the line. The suffix will be updated to 01, 02, 03 etc. depending on the number of suppliers being awarded. Suffix can also be changed to anything that is helpful to the agency for identification purposes.

13. The **Go to Contract** link will display. Click on the link.

The screenshot shows the 'Convert REQ to Contract' interface. At the top, it displays 'Requisition Selection' with Business Unit: MHAM1 and Requisition ID: 0000032138. Below this is a table with columns: Supplier ID, Contract ID, Contract ID Suffix, Master Flag, Begin Date, Expire Date, State Identified Contract Type, Open Item, Line Details, Awarded Amount, and Go to Contract. The first row contains: 1, 0000011297, 18MHA32138, POS01, [checkbox], 05/01/2018, 04/30/2019, PON Noncompetitive, [checkbox], Line Details, [empty], and a red-bordered 'Go to Contract' link. At the bottom, there are 'Save', 'Refresh', 'Add', and 'Update/Display' buttons.

14. The Procurement Contract will display in **Open** status

The screenshot shows the 'Add/Update Contracts' interface. The 'Contract' tab is selected. Under 'Contract Entry', the 'Contract' section is active. Key fields include: SetID STATE, Contract ID 18MHA32138POS01, *Status Open (highlighted in red), Version 1, Status Current, Approval Due Date [calendar icon], Administrator/Buyer [search], State Identified Contract Type PON Noncompetitive, Add a Document button, *Contract Style Purchase Order, Process Option Purchase Order, *Supplier MIDWES0278-001 (with Supplier Search), *Supplier ID 0000011297 (with MIDWESTERN CONNECTICUT COUNCIL OF), Primary Contact [search], Supplier Contract Ref MCCA, #19-6002, Description MHAM1 0000032138, Master Contract ID [search], *Begin Date 05/01/2018, Expire Date 04/30/2019, Renewal Date [calendar icon], Control Type [dropdown], Tax Exempt [checkbox], Tax Exempt ID [input], Auto Default [checked checkbox], Lock Chartfields [checkbox], Corporate Contract [checkbox], Currency USD, Rate Date 05/02/2024, CRRNT [search], Must Use Contract Rate Date [checkbox], and Allow Multicurrency PO [checkbox]. On the right, there are links for Add Comments, Contract Activities, Primary Contact Info, Contract Header Agreement, Contract Releases, Custom Fields, Activity Log, Document Status, Thresholds & Notifications, Price Adjustment Template, and PO Defaults.

15. Uncheck the **Corporate Contract** checkbox, ensure the **Allow Open Item Reference** checkbox is **unchecked**, and update Contract information *as necessary*.

The screenshot shows a web form for contract configuration. At the top right, the **Corporate Contract** checkbox is highlighted with a red box and is currently checked. Below it, the **Amount Summary** section contains a table with the following data:

Field	Value	Unit
Maximum Amount	100,000.00	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Non-PO PCard Transactions	0.00	
Total Released Amount	0.00	
Remaining Amount	100,000.00	
Remaining Percent	100.00	

At the bottom, the **Contract Open Item Reference** section has the **Allow Open Item Reference** checkbox highlighted with a red box and is currently checked. Other options include **Adjust Supplier Pricing First** (unchecked) and **Price Can Be Changed on Order** (checked). There are also links for **Add Open Item Price Adjustments** and **OPM Reporting**.

16. Once the Supplier contract is fully executed the status on the Procurement contract can be updated to **Approved**. Click **Save**.

The screenshot shows the **Contract Entry** form with the **Contract** section expanded. The ***Status** dropdown menu is highlighted with a red box and is set to **Approved**. Other fields include **Contract ID** (18MHA32138POS01), **Contract Version** (1), and **Status** (Current). There is an **Add a Document** button. At the bottom, there are buttons for **Save**, **Return to Search**, **Notify**, **Refresh**, **Add**, **Update/Display**, and **Correct History**.