



## Creating a Requisition with Multiple Distributions for all Requisition Types

**\*It is very important to follow these steps exactly as shown\***

### Procedure



#### Navigation:

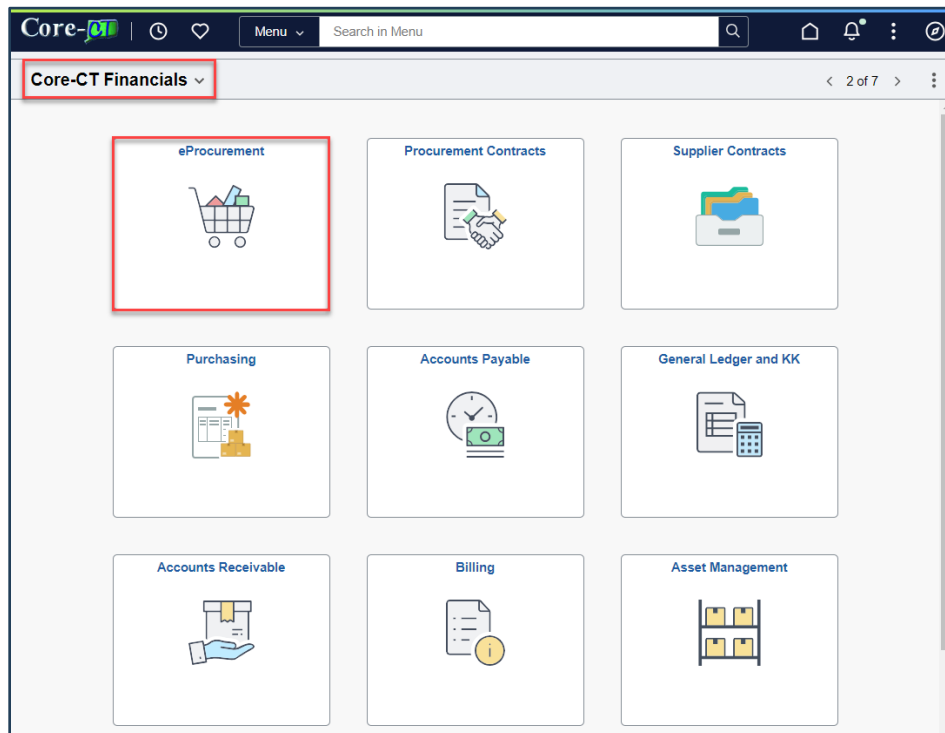
**Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisition**

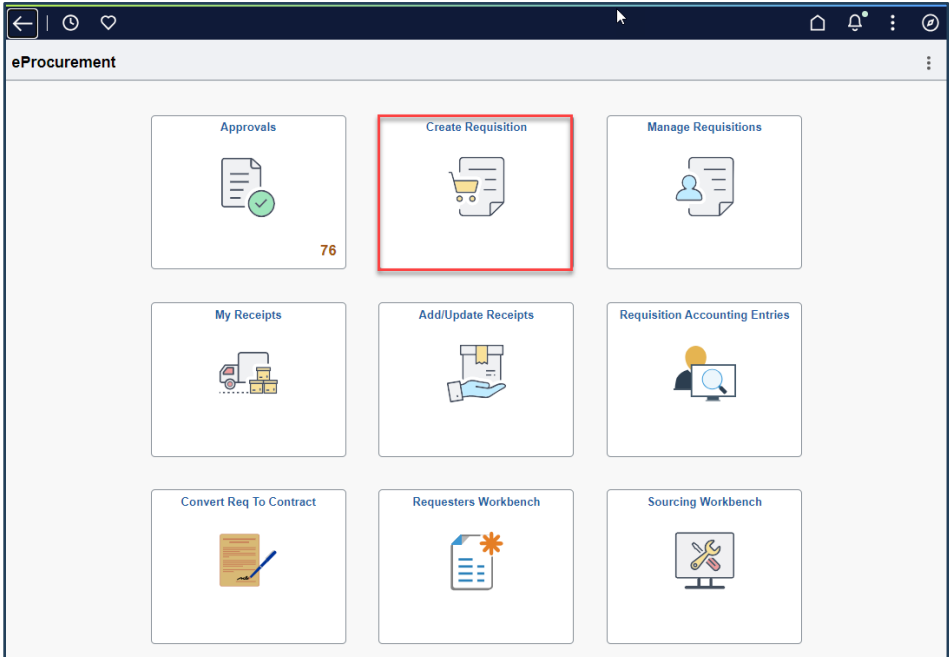
**OR**

Select **Core-CT Financials**

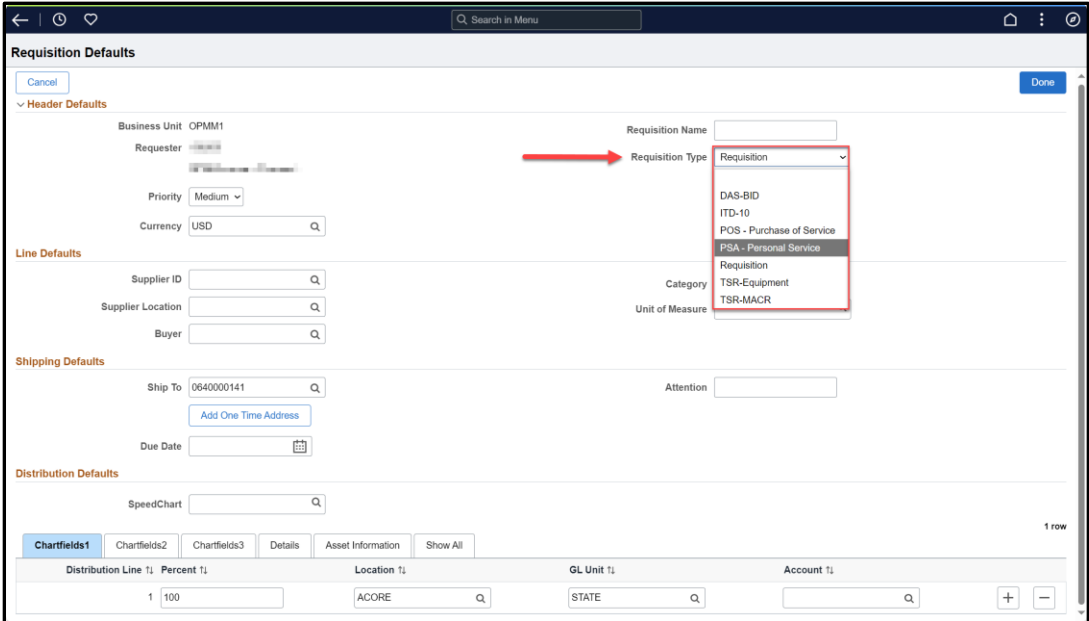
Click **eProcurement** tile

Click **Create Requisition** tile





- 1. Requisition Defaults Displays
- 2. Click Requisition Type Dropdown and select the required Requisition Type. You must know the Req Type prior to entering the requisition. Once a Req Type is saved, it cannot be changed. For this example we are using Requisition Type PSA-Personal Service.





3. Click on the **PSA Details** link.

A screenshot of the "Requisition Defaults" form. The form has a "Cancel" button on the top left and a "Done" button on the top right. Under the "Header Defaults" section, there are fields for "Business Unit" (OPMM1), "Requester" (with a masked name), "Priority" (Medium), and "Currency" (USD). On the right side, there are fields for "Requisition Name" (Test) and "Requisition Type" (PSA - Personal Service). A red box highlights the "PSA Details" link below the "Requisition Type" dropdown.

4. Click on the appropriate link and **click OK**

A dialog box titled "PSA Details" with a mouse cursor pointing to the title bar. It contains a section "Select Type (Click the Link)" with several radio button options: "Personal Service Agreement PSA" (with subtext "COMPETITIVE Personal Services Agreement Greater than \$50,000"), "Waiver from Competitive Solicitation PSA", "Non-Competitive PSA" (with subtext "NON-COMPETITIVE Personal Services Agreement Greater than \$50,000"), and "Amendment PSA" (with subtext "Greater than \$50,000 fewer than 3 acceptable proposals received in response to an RFP" and "Amendment to existing PSA"). At the bottom are "OK" and "Cancel" buttons.



5. Answer the questions. Click **OK**.

**Personal Service Agreement PSA** [X]

COMPETITIVE Personal Services Agreement Greater than \$50,000

Yes  No Is this a requisition to execute a Request for Proposal (RFP)?

Yes  No Does the scope of work for this PSA include auditing services permissible by the state Auditors of Public Accounts?

Yes  No Has a Cost Benefit Analysis (CBA) been completed per §4e-16(a)?

Explain why a CBA is not required. Select "Yes" for all that apply:

Yes  No Services are currently provided by a non-state entity

Yes  No The contract is with a non-profit and the contract was in effect as of January 1, 2009

Yes  No Services are new and not currently provided by any state employees

Yes  No Has a Cost Effectiveness Evaluation (CEE) been completed per §4e-16(p)? If "Yes", keep on file for potential audits.

Explain why a CEE is not required. Select "Yes" for all that apply:

Yes  No The contract is with a non-profit

Yes  No The contract was in effect as of January 1, 2009

Yes  No This type of service cannot currently be provided by state employees

Yes  No Is this request in accordance with your agency's current OPM-approved procurement plan?

Yes  No Has the agency contracted out for these services during the preceding two years?  
If yes, provide the following information about the previous contract.

Contract ID	<input type="text"/>
Contract Type	
Supplier ID	
Supplier Name	
Begin Date	
End Date	
Maximum Amount	

Yes  No Does another State agency have the resources to provide these services?

Yes  No Can these services be purchased on a cooperative basis with another State agency?

Yes  No Will the services (irrespective of contractor) be ongoing?



- 6. Enter **Supplier ID**.
- 7. Enter **Buyer ID**.
- 8. Enter **Category**.
- 9. Enter **Unit of Measure**.

Note: \*Do NOT enter anything in these fields for Catalog or Punchout requisitions, as the values will auto-populate accordingly. Supplier ID is *not required* for DAS-BID, POS, or PSA req types.

- 10. Expand the Distribution Defaults by clicking the “**Show all**” tab.

The screenshot shows the 'Requisition Defaults' form with the following sections and fields:

- Header Defaults:** Business Unit (CPMM1), Requisition Name (Test), Requisition Type (PSA - Personal Service), Priority (Medium), Currency (USD).
- Line Defaults:** Supplier ID (000000005), Category (00000000), Supplier Location (MAIN), Unit of Measure (EA), Buyer (085741).
- Shipping Defaults:** Ship To (0640000141), Attention, Due Date.
- Distribution Defaults:** SpeedChart.

At the bottom, there are tabs for 'Chartfields1', 'Chartfields2', 'Chartfields3', 'Details', 'Asset Information', and 'Show All'. The 'Show All' tab is highlighted with a red box. Below the tabs is a table with columns: Distribution Line #, Percent %, Location %, GL Unit %, and Account %.

Distribution Line #	Percent %	Location %	GL Unit %	Account %
1	100	ACORE	STATE	



11. Click on the + sign at the end of the chartfield string to add an additional distribution line.
12. Distribute the percentage accordingly, to add to 100% among multiple distribution lines.

SpeedChart

2 rows

Distribution Line %	Percent %	Location %	GL Unit %	Account %	
1	55	ACORE <input type="text" value=""/>	STATE <input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="+"/> <input type="button" value="-"/>
2	45	ACORE <input type="text" value=""/>	STATE <input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="+"/> <input type="button" value="-"/>

13. Select .
14. Click on the **Fixed Cost Service** tab.

Note: For requisitions other than Catalog and Punchout (Web Suppliers), the Category, Supplier ID, Supplier Location, and Currency Code fields are populated with values entered on the Requisition Defaults page.

15. Enter **Service Description**.
16. Enter **Price**.
17. Enter **Start Date**.
18. Enter **End Date**.
19. Click **Add to Cart**.
20. Repeat steps 15-19 to add additional services as needed.

Create Requisition

Requisition Defaults

**Fixed Cost Service**

Service Information

\*Service Description

\*Price

\*Category

Start Date

\*Currency Code

End Date

Supplier Information

Supplier ID

Supplier Location

Quote Number

Quote Date


Comment

Comment Text

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



21. Once the required services are added to the cart, click **Checkout**.

**Create Requisition** Requisition Defaults  **Checkout**

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**Fixed Cost Service**

**Service Information**

\*Service Description

\*Price  \*Currency Code

\*Category  Start Date  End Date

**Supplier Information**

Supplier ID  Supplier Location

Quote Number  Quote Date

**Comment**

Comment Text

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



22. Select the **Schedule Details** tab at the end of the line.

**Create Requisition**

Continue Shopping Save Submit

**Checkout** [Requisition Defaults](#) Order Total 1,000.00 USD

**Requisition Summary**

Business Unit OPMM1 Office of Policy & Management  
Requisition Name  Priority   
Requester  Requisition Type   
Currency USD [PSA Details](#)

**Justification Comments**

**Requisition Lines Overview**

Select All [Actions](#)

Line	Description	Quantity	Price	Currency	Total	Actions
Line 1	Fixed Cost Service Test	1	1000.00	USD	1,000.00 USD	<input type="checkbox"/> <input type="button" value="ScheduleDetails"/> >

Order Total 1,000.00 USD





23. Click on the + sign to add another line.

Distribution lines will default from the Req Defaults onto all req lines. User will only need to make changes to the ChartFields, or add/remove distribution lines, on those req lines where the distribution lines need to differ from the defaulted values.

The screenshot shows the 'Requisition Line Details' window. At the top, it displays 'Order Total: 1000.00 USD'. The main area is divided into sections: 'Item Summary', 'Attributes', 'Schedule 1', and 'Distributions'. The 'Distributions' section is expanded, showing a table with two rows. The first row has a 'Merchandise Amount' of 550.00 and an 'Open Amount' of 550.00. The second row has a 'Merchandise Amount' of 450.00 and an 'Open Amount' of 450.00. A red box highlights the '+' sign next to the 'Open Amount' field in the first row, indicating where to click to add a new distribution line.

Distribution	Quantity	Dist Type %	Location %	Percent %	Merchandise Amount %	GL Business Unit %	Open Amount %
1	Open	ACORE	Q	55	550.00	STATE	550.00
2	Open	ACORE	Q	45	450.00	STATE	450.00

The Merchandise Amt fields will become editable. **Update the Merchandise Amt on the first line to the correct amount and then use the TAB key to move out of the field.** Do the same for each distribution line. (Very important to use the TAB key) The system will recalculate the Percentages when clicking the tab.



24. Click **Done**.

Requisition Line Details

Order Total 1000.00 USD

1 row

Line 1  
Test  
Fixed Cost Service

**Item Summary**

Test

Item ID  
Item Category All Items  
Supplier  
Supplier Item ID  
Buyer  
Price 1000.00 USD  
Quantity 1

Manufacturer  
Manufacturer's Item ID  
Lead Time Days 0

**Attributes**

Fixed Cost Service

**Schedule 1**

Schedule 1  
Quantity 1  
Price 1000.00 USD  
Total 1000.00 USD

\*Ship To 064000141  
Attention To  
Due Date 12/26/2024  
Address 450 Capitol Ave - MS453ADM  
Hartford, CT 06106-1308

Ship To Comments Price Adjustments Custom Fields

**Distributions**

Please enter GL Business Unit before selecting chartfield values

\*Distribute By Amount SpeedChart

Chartfields1	Chartfields2	Chartfields3	Details	Budget Information	Asset Information	Show All	
Distribution Line %1	Status %1	Dist Type %1	Location %1	Percent %1	Merchandise Amount %1	GL Business Unit %1	Open Amount %1
1	Open		ACORE	55	550.00	STATE	550.00
2	Open		ACORE	45	450.00	STATE	450.00



- 25. Click on the **Line Details** tab
- 26. Check the **Amount Only** Check Box if your Contract/PO will be an Amount Only PO. For Services, Amount Only should be Yes.

- 27. Answer **Yes** to this message if you check the Amount Only check box.

The quantity will be set to 1 for an amount only line. The system will reprice the line. Continue?

- 28. You will then get the Allocate Message. This time answer **No**

Allocate the changed amount based on the split distribution?  
Selecting 'Yes' will allocate the amount based on the existing distribution percentages. Selecting 'No' will require a manual update of the distribution lines.

- 29. Click **Done**.



Requisition Line Details

Order Total 1000.00 USD

Line 1

Test

Fixed Cost Service

**Item Summary**

Test

Item ID: [ ] Physical Nature: Goods

Item Category: All Items Buyer: 065741

Original Substituted Item: [ ]

Long Description: Test

Price: 1000.00 USD

Quantity: 1

**Attributes**

Fixed Cost Service

Expand All  Collapse All

**Item Additional Information**

Device Tracking:  Amount Only:  Yes

Stockless Item:  No Zero Price Indicator:  No

RFQ Required:  No

Inspection Required:  No

**Contract Information**

Use Contract if Available:  Yes

Contract ID: 03OPM1251AE

Contract Line: [ ]

Contract Version: 1

Category Line: [ ]

**Supplier Information**

Supplier ID: 000000005

Supplier Name: [ ]

Supplier Location: MAIN

Supplier's Catalog Number: [ ]

Supplier Item ID: [ ]

Item Supplier Priority: [ ]



30. Click **Submit**.

**Create Requisition**

Continue Shopping Save **Submit**

**Checkout** Requisition Defaults Order Total 1,000.00 USD

▼ Requisition Summary

Business Unit OPMM1 Office of Policy & Management Priority Medium

Requisition Name Test Requisition Type PSA - Personal Service

Requester [Redacted] Currency USD

Header Comments

▼ Justification Comments

▼ Requisition Lines Overview

Select All Actions

Line	Description	Quantity	Price	Currency	Total	Actions
Line 1	Fixed Cost Service Test	1	1000.00	USD	1,000.00 USD	ScheduleDetails

Order Total 1,000.00 USD

31. Message will be displayed. Click **OK**.

A saved Requisition Type can't be changed. Are you sure you want to save a Requisition Type of PSA?  
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.

**OK** Cancel

The system will generate a Confirmation, and the Requisition has been routed for Approvals.