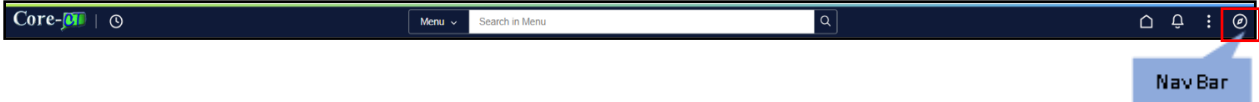




Standardized Transaction Less than the DAS/CGS Established Dollar Amount

Purpose

The Agency will create a DAS-Bid to initiate a Standardization Transaction.



Navigation:

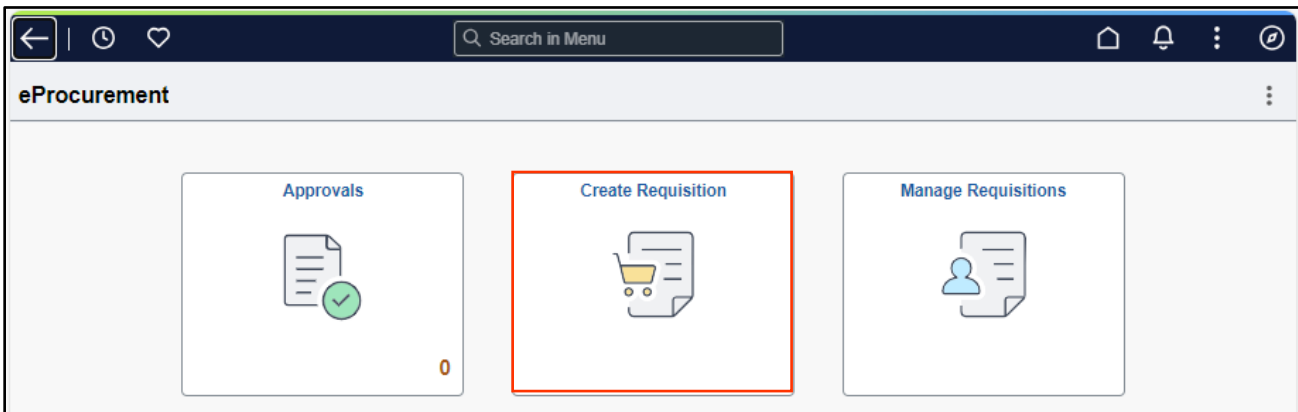
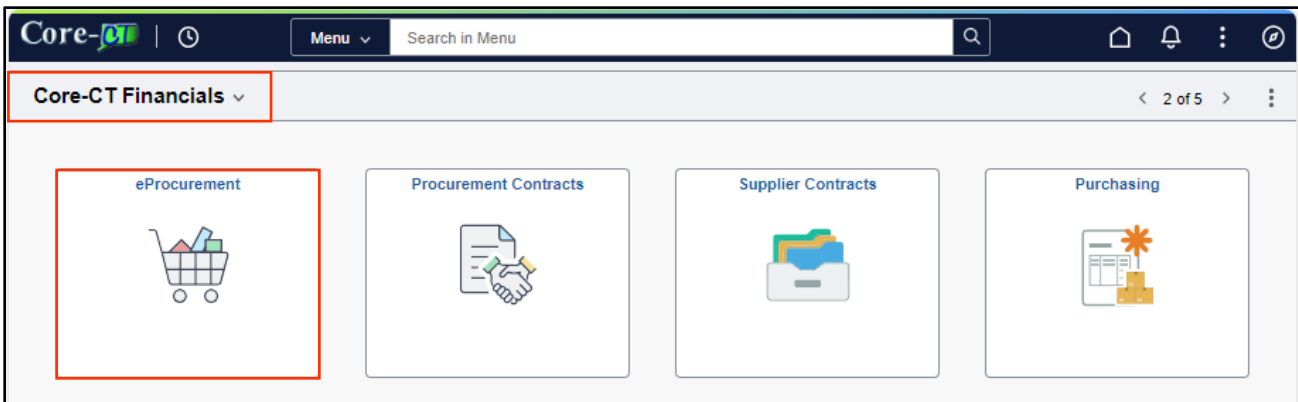
Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisition

OR

Select **Core-CT Financials**

Click the **eProcurement** Tile

Click the **Create Requisition** Tile





1. Requisition Defaults:

- a. Name the requisition or it will default to the requisition number.
- b. Choose DAS-BID in the Requisition Type dropdown box.
- c. Add the Supplier, Buyer, Category and Unit of Measure.
- d. Enter the appropriate Chartfield information.
- e. Click on the DAS-BID Attributes Link. [DAS-BID Attributes](#)

Requisition Defaults

Cancel Done

Header Defaults

Business Unit: MHAM1
Requester: YoungB
MHA-Young Barbara
Priority: Medium
Currency: USD

Requisition Name: Standardization < \$50,000
Requisition Type: DAS-BID
[DAS-BID Attributes](#)

Line Defaults

Supplier ID: 000000001
Supplier Location: MAIN
Buyer:
Category: 00000000
Unit of Measure: EA

Shipping Defaults

Ship To: 083000074
Attention:
[Add One Time Address](#)

Due Date:
[Add One Time Address](#)

Distribution Defaults

SpeedChart:
[Add One Time Address](#)

Chartfields

Chartfields1 Chartfields2 Chartfields3 Details Asset Information Show All

Distribution Line	Percent	Location	GL Unit	Account	Fund	Dept	SID	Program	Bud Ref
1	0	ACORE	STATE		11000	MHA53187	10020	00000	



- f. Enter the Plan Start Date.
- g. Check the Standard Trans checkbox.
- h. Click DONE.

- i. Click Done.



2. Click on the Special Requests tab:

The screenshot shows the 'Create Requisition' interface. The left sidebar has a 'Special Requests' tab highlighted with a red box. The main form has the following fields and sections:

- Item Information:** *Item Description (STX - IBM Server Racks), *Price (25,000), *Quantity (1), *Category (00000000), *Currency Code (USD), *Unit of Measure (EA), Due Date.
- Supplier Information:** Supplier ID (000000001), TOWN OF ANDOVER, Supplier Location (MAIN), Supplier Item ID (highlighted with a red box).
- Manufacturer Information:** Manufacturer ID, Manufacturer's Item ID.
- Comment:** Comment Text, Send Comment to Supplier, Show Comment on Receipt, Show Comment on Voucher.
- Buttons:** Add to cart (highlighted with a red box), Checkout.

- STX should be entered as the first 3 characters in the Item description line so that Approvers can identify Standardization Transactions in the Approvals page.
- Add the Price, Quantity, Category, Supplier ID, and Unit of Measure.
- Click Add to cart.
- Click Checkout.



- 3. Create Requisition:
 - a. Click on the Line Comments button.

Create Requisition

[Continue Shopping](#) [Save](#) [Submit](#)

Checkout

[Requisition Defaults](#) Order Total **25,000.00 USD**

Requisition Summary

Business Unit: MHAM1 Mental Health & Addiction Serv Priority: Medium

Requisition Name: Standardization < \$50,000 Requisition Type: Requisition

Requester: YoungB MHA-Young Barbara Dispatch Method: Print

Currency: USD [Obligation Amount](#)

[Header Comments](#)

Justification Comments

Requisition Lines Overview

Select All Actions ⌵ 1 row

Quantity	Unit of Measure	Price	Currency	Total	
1	EA	25000.00	USD	25,000.00 USD	ScheduleDetails >

Line 1 Special Request
STX - IBM Server Racks

Item ID:

Supplier: TOWN OF ANDOVER

[Line Comments](#) [Delete](#)

Order Total **25,000.00 USD**



b. Click on the Add Attachment button.

The dialog box titled "Requisition Line Comments and Attachments" has a "Cancel" button on the top left and a "Done" button on the top right. Below the title bar, there is a "Comments" section with a "+" button and a "-" button. A "Use Standard Comments" button is located below the "Comments" section. A "Comment Text" label is positioned to the left of a large text input field. Below the input field, there are three rows of checkboxes, each followed by the text "No": "Send to Supplier", "Show at Receipt", and "Show at Voucher". At the bottom left of the dialog box, the "Add Attachment" button is highlighted with a red border.


c. Click on the My Device button.

The dialog box titled "File Attachment" has a close button (X) in the top right corner. Below the title bar, the text "Choose From" is displayed. A button labeled "My Device" is shown, featuring an icon of a computer monitor and a smartphone. This button is highlighted with a red border.



d. Once any supporting documentation is found, upload it by clicking on the Upload button.

UploadClear



Sourcing Workbench.docx
File Size: 655KB

NOTE: Additional attachments may be added by following the same steps, however only one comment or attachment may be entered on the header. If multiple comments and attachments are required they **must** be entered on the line.



e. Click the Done button once completed.

[Cancel](#) **Requisition Line Comments and Attachments** [Done](#)

Comments + -

[Use Standard Comments](#)

Comment Text

Send to Supplier No

Show at Receipt No

Show at Voucher No

[Add Attachment](#)

Attachments 1 row

View ↑↓	Attachment ↑↓	Send to Supplier	↑↓
1 View	Sourcing_Workbench.docx	<input type="checkbox"/> No	-

f. Click the Submit button to initiate workflow.

Create Requisition ⋮

[Continue Shopping](#) [Save](#) [Submit](#)

Checkout

[Requisition Defaults](#)

Order Total 25,000.00 USD

[Requisition Summary](#)



The requisition will now be in "Pending Approval" status.

Checkout Confirmation

[Print Preview](#)

Requisition Details

Business Unit	MHAM1	Total Lines	1
Requisition ID	0000038472	Total Amount	25,000.00 USD
Requisition Name	Standardization < \$50,000	Budget Checked Status	▲ Not Checked
Last Modified Date	05/10/2024 3:32:01PM	BID NO:	24PSX0042
Status	Pending Approval	DAS-BID Attributes	

[View Approval Chain](#)

4. The following Requisition Approvers must take action:

- Req. Amount Approvers
- Req. Budget Approvers
- Req. Purchasing Approvers

The Requisition Amount, Budget Approver and Purchasing Approver will approve the transaction.

Once it is routed to the DAS Approver 1 (Contract Team Leader) they will ad hoc a Contract Specialist into the workflow and then approve the requisition so it can be reviewed and processed.

5. The Contract Specialist will:

- Approve or Deny the requisition.
- Provide the agency with the Standardization Transaction Form ST-81 (If approved)

6. The Agency will run the process to [convert a standardization transaction to a procurement contract](#) and attach the Standardization Transaction to the contract. (The contract will be in Open status).

7. The Agency must update any necessary information and approve the contract.



8. If the requisition is denied, the agency should Cancel the requisition.

To view the requisition approval chain, navigate to:

Nav Bar > Menu > Core-CT Financials > eProcurement > Manage Requisition

OR

Select **Core-CT Financials**

Click the **eProcurement** Tile

Click the **Manage Requisition** Tile

1. Click the downward arrow next to the requisition, and then click “View Approval”.

Actions								
Details		MHAM1/0000038386	04/19/2024	MHA-Young	Pending	In Process	1.00 USD	>
Copy	Flag	MHAM1/0000038385	04/19/2024	MHA-Young	Pending	Not Chk'd	7.68 USD	>
View Print	R	MHAM1/0000038384	04/18/2024	MHA-Young	Pending	Not Chk'd	450.00 USD	>
Cancel	Edit	MHAM1/0000038383	04/18/2024	MHA-Young	Pending	Not Chk'd	1.00 USD	>
Edit								
View Approval	\$50,000	MHAM1/0000038382	04/18/2024	MHA-Young	Pending	Not Chk'd	25,000.00 USD	>

For additional assistance, please visit

https://portal.ct.gov/das/procurement/contracting/das-procurement-standardization-transactions---waivers-of-the-bid-process?language=en_US