Standardized Transactions Greater than the CGS/DAS-Established Dollar Threshold
eProcurement
Updated as of: 08/14/2024November 20, 2024
Core-CT Financials

Standardization Transaction Greater than the CGS/DAS-Established Dollar Threshold
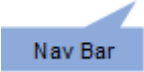
The Agency will create a DAS-Bid to initiate a Standardization Transaction.

Navbar Navigation:

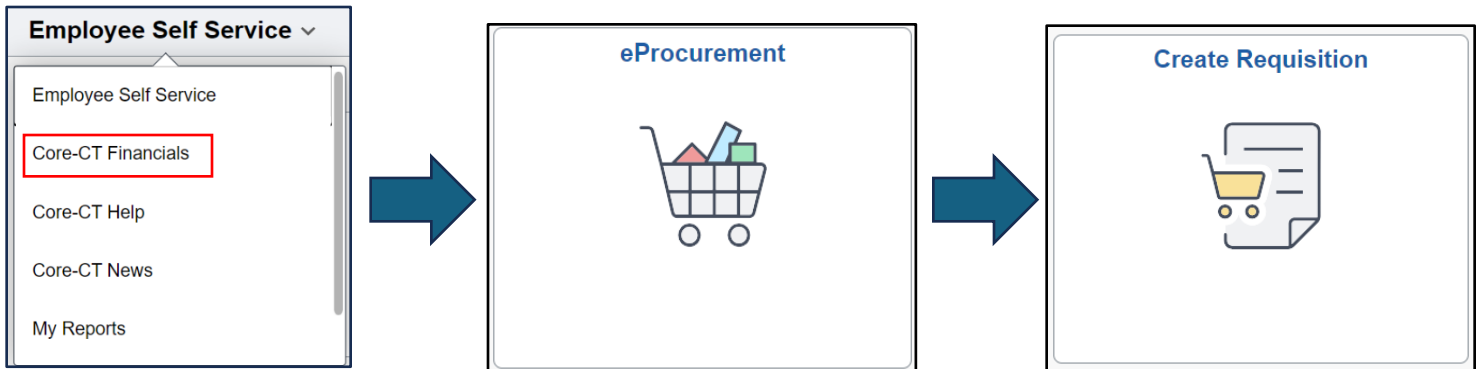**Navbar>Menu>Core-CT Financials > eProcurement> Create Requisition**

Or

Tile Navigation:

Core-CT Financials > eProcurement> Create Requisition Tile

Standardized Transactions Greater than the CGS/DAS-Established Dollar Threshold
eProcurement
Updated as of: 08/14/2024November 20, 2024
Core-CT Financials

1. Enter Requisition Defaults:
   a. Choose DAS-BID in the Requisition Type dropdown box.
   b. Name the requisition or it will default to the requisition number.
   c. Add the Supplier ID/Location, Buyer, Category and Unit of Measure.
   d. Add the Ship To address, Due Date, and Attention.
   e. Enter the appropriate Chartfield information.
   f. Click the DAS-Bid Attributes Link.

Requisition Defaults

Cancel		Done

Header Defaults

Business Unit	MHAM1		Requisition Name	Standardization Transaction
Requester	YoungB		Requisition Type	DAS-BID
	MHA-Young Barbara			DAS-BID Attributes
Priority	Medium			
Currency	USD			

Line Defaults

Supplier ID	0000010128		Category	
Supplier Location	MAIN		Unit of Measure	
Buyer				

Shipping Defaults

Ship To	0830000074		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
1	100	ACORE	STATE		11000	MHA53187

Standardized Transactions Greater than the CGS/DAS-Established Dollar Threshold
eProcurement
Updated as of: 08/14/2024November 20, 2024
Core-CT Financials

g. Toggle the Standard Trans to 'Yes', and enter a Plan Start Date (this field is required).
h. Click Done.

Cancel		Done
DAS-BID Attributes		
Plan Start Date	08/15/2024	
Out To BiD Date		
Bid Cancel Date		
No Award	No	
Bid Close Date		
No Award Date		
Bid Open Date		
Description		
BID Synopsis		
Insurance Required	No	
EPP	No	
Catalog Required	No	
CT Recovery	No	
Bond Required	No	
Set Aside Bid	No	
Political Subs	No	
Inventory Reqd	No	
Micro Bus. Pref	No	
RFI	No	
Standard Trans	Yes	
Revenue Generating	No	

Standardized Transactions Greater than the CGS/DAS-Established Dollar Threshold
eProcurement
Updated as of: 08/14/2024November 20, 2024
Core-CT Financials

i. Click Done.

Requisition Defaults

Cancel   Done

∨ Header Defaults

Business Unit	MHAM1	Requisition Name	Standardization Transaction
Requester	YoungB	Requisition Type	DAS-BID
	MHA-Young Barbara		DAS-BID Attributes
Priority	Medium		
Currency	USD		

Line Defaults

Supplier ID	0000010128	Category	
Supplier Location	MAIN	Unit of Measure	
Buyer			

Shipping Defaults

Ship To	0830000074	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
1	100	ACORE	STATE		11000	MHA53187

Standardized Transactions Greater than the CGS/DAS-Established Dollar Threshold
eProcurement
Updated as of: 08/14/2024November 20, 2024
Core-CT Financials

2. Create Requisition:
    a. Click on the Special Requests option.
    b. Add the Price, Quantity, Category, Supplier ID, and Unit of Measure.
    c. Click add to Cart.
    d. Click Checkout.

STX should be entered as the first 3 characters on the item description line so that Approvers can identify Standardization Transactions in their approvals list.

Standardized Transactions Greater than the CGS/DAS-Established Dollar Threshold
eProcurement
Updated as of: 08/14/2024November 20, 2024
Core-CT Financials

3. Click on Header Comments

a. Click on the Add Attachment button.

Standardized Transactions Greater than the CGS/DAS-Established Dollar Threshold
eProcurement
Updated as of: 08/14/2024November 20, 2024
Core-CT Financials

b. Click on the Choose From.
c. Once the required Standardization Transaction justification document is found, upload it by clicking on the Upload button.
d. Click the Done button once completed to close the File attachment box.
e. Click Done to close the Header Comments and Attachments box

Additional attachments may be added by following the same steps

Standardized Transactions Greater than the CGS/DAS-Established Dollar Threshold
eProcurement
Updated as of: 08/14/2024November 20, 2024
Core-CT Financials

f. Click the Submit button to initiate workflow.

Create Requisition	⋮

Continue Shopping | Save | Submit

Checkout

Requisition Defaults

Order Total **150,000.00 USD**

∨ Requisition Summary

Business Unit	MHAM1 Mental Health & Addiction Serv	Priority	Medium ∨
Requisition Name	Standardization Transaction	Requisition Type	Requisition ∨
Requester	YoungB MHA-Young Barbara	Dispatch Method	Email ∨
Currency	USD		

☐ Header Comments

Obligation Amount

∨ Justification Comments

∨ Requisition Lines Overview

☐ Select All   Actions ⊙

1 row

☐	**Line 1** Special Request STX-IBM Server Item ID Supplier IBM CORPORATION ☐ Line Comments 🗑 Delete	Quantity 1	Unit of Measure EA 🔍	Price 150000.00	Currency USD	Total **150,000.00 USD**	🗓 ScheduleDetails ＞

Order Total 150,000.00 USD

g. Press Okay to Save the Requisition

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

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

Standardized Transactions Greater than the CGS/DAS-Established Dollar Threshold
eProcurement
Updated as of: 08/14/2024November 20, 2024
Core-CT Financials

The requisition will now be in "Pending" status (see [≡ View Approval Chain]).

Checkout Confirmation

[🖶 Print Preview]

Requisition Details

Business Unit	MHAM1	**Total Lines**	1
Requisition ID	0000038510	**Total Amount**	150,000.00 USD
Requisition Name	Standardization Transaction	**Budget Checked Status**	⚠ Not Checked
Last Modified Date	08/15/2024 11:50:09AM	**BID NO:**	24PSX0058
Status	🗔 Pending Approval		DAS-BID Attributes

[≡ View Approval Chain]

Next Steps

📝 Edit this Requisition
　Modify this requisition

👤 My Requisitions
　Go to existing requisitions

🛒 Create Requisition
　Create another requisition

Standardized Transactions Greater than the CGS/DAS-Established Dollar Threshold
eProcurement
Updated as of: 08/14/2024November 20, 2024
Core-CT Financials

4. Requisitions Approval Flow:

The following Requisition Approvers must take action:

      a. Req. Amount Approvers

      b. Req. Budget Approvers

      c. Req. Purchasing Approver

The Requisition Amount, Budget and Purchasing Approver will perform an approval action (approve, deny, pushback, hold, request for information) on the transaction accordingly.

Approval Flow   ×

Amount Approval

⌄ **Standardization Transaction**   **Pending**

Start New Path

Req Amount Approval

⏳ Pending   ＋

Multiple Approvers
REQ AMT APPROVER 1   ›

✉ Not Routed   ＋

Multiple Approvers
REQ AMT APPROVER 2   ›

✉ Not Routed   ＋

Multiple Approvers
REQ AMT APPROVER 3   ›

Req Purchasing Approval

⌄ **Standardization Transaction**   **Awaiting Further Approvals**

Start New Path

Req Purchasing Approval

✉ Not Routed   ＋

Multiple Approvers
REQ PURCH APPROVER   ›

BID Approver

⌄ **Standardization Transaction**   **Awaiting Further Approvals**

Start New Path

DAS-BID Approver

✉ Not Routed   ＋

Multiple Approvers
DAS APPROVER1   ›

Standardized Transactions Greater than the CGS/DAS-Established Dollar Threshold
eProcurement
Updated as of: 08/14/2024November 20, 2024
Core-CT Financials

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

- ❖ The Contract Specialist will:
  - ▪ Print out the appropriate documentation and send it to the Standardization Committee for a vote.
  - ▪ Once the votes are received the Contract Specialist can Approve / Deny the requisition.
  - ▪ If approved, the Contract Specialist will pursue a contract with the vendor
  - ▪ Convert the requisition into a Contract if approved. (See the Convert Requisition to a Procurement Contract job aid for more information)
  - ▪ If the requisition is not approved, the DAS-BID Standardization Transaction Requisition will be denied and returned to the agency.
- ❖ For Denied requisitions the Agency will cancel and/or close the Requisition on the Requesters' Workbench.