

## Standardization Transaction Greater than the CGS/DAS-Established Dollar Threshold

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



**Tile Navigation:** 

**Core-CT Financials > eProcurement> Create Requisition Tile** 



# Core-

- 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
Business Unit	MHAM1		Requisition Name	Standardization Transactior	
Requester	YoungB Q		Requisition Type	DAS-BID ~	
	MHA-Young Barbara		D	AS-BID Attributes	
Priority	Medium ~				
Currency	USD Q				
Line Defaults					
Supplier ID	0000010128 Q		Category	Q	
Supplier Location	MAIN Q		Unit of Measure	Q	
Buyer	Q				
Shipping Defaults					
Ship To	0830000074 Q		Attention		
	Add One Time Address				
Due Date	⊞				
Distribution Defaults					
SpeedChart	Q				
Chartfields1 Chartfields	2 Chartfields3 Details	Asset Information Show All			
Distribution ↑↓ Percent ↑↓	Location ↑↓	GL Unit ↑↓	Account ↑↓	Fund ↑↓	Dept ↑↓
1 100	ACORE	Q	Q	<b>Q</b> 11000	Q MHA53187



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	5		
Plan Start Date	08/15/2024	Ē	
Out To BiD Date		Ē	
Bid Cancel Date		Ē	
No Award	No		
Bid Close Date		Ē	
No Award Date		Ē	
Bid Open Date		Ē	
Description			
BID Synopsis		10	
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		



#### i. Click Done.

Requisition Defaults					
Cancel					Done
✓ Header Defaults					
Business Unit	MHAM1		Requisition Name	Standardization Transactior	
Requester	YoungB Q		Requisition Type	DAS-BID ~	
	MHA-Young Barbara			DAS-BID Attributes	
Priority	Medium ~				
Currency	USD Q				
Line Defaults					
Supplier ID	0000010128 Q		Category	Q	
Supplier Location	MAIN Q		Unit of Measure	Q	]
Buyer	Q				
Shipping Defaults					
Ship To	0830000074 Q		Attention		
	Add One Time Address				
Due Date	İ				
Distribution Defaults					
SpeedChart	Q				
Chartfields1 Chartfields	2 Chartfields3 Details	Asset Information Show All			
Distribution ↑↓ Percent ↑↓ Line	Location ↑↓	GL Unit ↑↓	Account ↑↓	Fund ↑↓	Dept ↑↓
1 100	ACORE	Q STATE	Q	Q 11000	Q MHA53187



- 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.

Create Requisition						_	
			Requisition Defaults			) o	Checkout
[] Catalog	Special Requests						
	Item Information	(					
🛆 Special Requests	*Item Description	STX - IMB Server		~			
Fixed Cost Service	*Price	150000.00		*(	Surrency Code	USD	Q
C Time and Materials	*Quantity	1		*U	nit of Measure	EA	Q
Variable Cost Service	*Category	46000000 Q					
Templates	Due Date						
	Supplier Information						
	Supplier ID	0000010128 Q	IBM CORPORATION	Suj	oplier Location	MAIN	Q
	Supplier Item ID						
	Manufacturer Information						
	Manufacturer ID		2	Manufac	turer's Item ID:		Q
	Comment						
	Comment Text						P
		Send Comment to Suppli	ier				
		Show Comment on Rece	ipt				
		Show Comment on Vouc	her				
	Add to cart						



#### 3. Click on Header Comments

Create Requisition						
× Pequisition Summary	Requisition Defaults			Continue Shoppi	ng Save	Submit
Business Unit       MHAM1 Mental Health & Addiction Serv         Requisition Name       Standardization Transaction         Requester       YoungB MHA-Young Barbara         Currency       USD         Image: Header Comments		Priority Requisition Type	Medium V DAS-BID DAS-BID Attribute	<b>~</b> 95		

a. Click on the Add Attachment button.

Cancel Requisition	Cancel Requisition Header Comments and Attachments				
Comments		+ -			
Use Standard Comments					
Comment Text					
Send to Supplier	No				
Show at Receipt	No				
Show at Voucher	No				
Add Attachment					



- 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

File Attachment	×
Choose From My Device	
Upload Clear	
Core Core Core CT.png File Size: 57KB	
File Attachment	Done
Choose From	
My Device	
Core Core CT.png File Size: 57KB	
Upload Co	mplete



#### 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 M	edium 🗸
Requisition Name Standardization Transaction	Requisition Type Re	equisition V
Requester YoungB MHA-Young Barbara	Dispatch Method Er	nail 🗸
Currency USD	Obl	igation Amount
<ul> <li>✓ Justification Comments</li> </ul>		
✓ Requisition Lines Overview □ Select All Actions ⊙		1 rov
Line 1 Special Request     STX-IBM Server     Item ID     Supplier IBM CORPORATION     Line Comments	Quantity         Unit of Measure         Price         Currency           1         EA         Q         150000.00         USD	Total 150,000.00 USD
		Order Total 150,000.00 USD
g. Press Okay to Save the Re	quisition	
A saved Requisition Type can't be	changed Are you sure you want to save a R	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

# Core-

ntirmation		
		合 Priı
Requisition Details		
Business Unit MHAM1	Total Lines 1	
Requisition ID 0000038510	Total Amount 150,000.00 USD	
Requisition Name Standardization Transaction	Budget Checked Status A Not Checked	
Last Modified Date 08/15/2024 11:50:09AM	DAS-BID Attributes	
Status 🕞 Pending Approval		
≴≣ View Approval Chain		
Next Steps		
Edit this Requisition		
Modify this requisition		
요크) My Requisitions		
Go to existing requisitions		
Greate Requisition		



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.

anount Approval Stant Aew Path Stant Aew Path Reg Amount Approval Reg Amount Approval Reg Amount Approval Stant Aew Path Reg Amount Approval Stant Aew Path Reg Amount Approval Stant Aew Path Reg Amount Approval Stant New Path	Approv	val Flow
Standardization Transaction       Pending         Standardization Transaction       Image: Standardization Transaction       Image: Standardization Transaction         Standardization Transaction       Image: Standardization Transaction       Image: Standardization Transaction       Image: Standardization Transaction         Standardization Transaction       Image: Standardization Transaction       Image: Standardization Transaction       Image: Standardization Transaction         Standardization Transaction       Image: Standardization Transaction       Image: Standardization Transaction       Image: Standardization Transaction         Standardization Transaction       Image: Standardization Transaction       Image: Standardization Transaction       Image: Standardization Transaction         Standardization Transaction       Image: Standardization Transaction       Image: Standardization Transaction       Image: Standardization Transaction         Disporter       Image: Standardization Transaction       Image: Standardization Transact	mount Approval	
start New Path Qe Anson Approval Qe Pending	✓ Standardization Transaction	Pending
Req Amount Approval   Image Pending   Multiple ApproverSvEr1   Image Amount ApproverSvEr1   Image Amount ApproverSvEr1   Image Amount ApproverSvEr2   Image Amount Amoun	Start New Path	
Pending +   Netligie Approvers >   Star Net outed +   Multiple Approvers >   Star Net outed +   Multiple Approvers >   ReG AMAT Approvers >   Star Net outed +   Multiple Approvers >   Red Amat Approvers >   Red Amat Approvers >   Start New Path +   Start New Path +   Multiple Approvers +   Red Purchasing Approval +   Start New Path <td< td=""><td>Req Amount Approval</td><td></td></td<>	Req Amount Approval	
NetGolA Ad PAPROVER 1 >   Ell Not Routed +   Multiple Approvers >   Ell Not Routed +   Multiple Approvers >   REQ AMT APPROVER 2 >   Ill Not Routed +   Multiple Approvers >   reg Autor Approvers >   reg Purchasing Approval +   reg	Pending	+
IN Not Routed +   Multiple Approvers >   In Not Routed +   In Not Routed -	Multiple Approvers REQ AMT APPROVER 1	>
Metion Add Approversion >   Standardization Transaction Awaiting Further Approval   Req Purchasing Approval >   Standardization Transaction Awaiting Further Approvals   Req Purchasing Approval +   Req Purchasing Approval +   Standardization Transaction Awaiting Further Approvals   Req Purchasing Approval +   Req Purchasing Approval +   Req Purchasing Approval +   Req Purchasing Approval +   Standardization Transaction Awaiting Further Approvals   Poprover -   Standardization Transaction Transaction Awaiting Further Approvals   D Approver -   Standardization Transaction -	⊠ Not Routed	+
Image: Not Routed   Multiple Approvers   REC AMMT APPROVER 3   arg Purchasing Approval   - standardization Transaction   Start New Path   Req Purchasing Approval   Image: Not Routed   Image: Not Routed   Image: Not Routed   Standardization Transaction   Approver   - standardization Transaction   Multiple Approvers   Image: Not Routed   Image: Not Routed <td>Multiple Approvers REQ AMT APPROVER 2</td> <td>&gt;</td>	Multiple Approvers REQ AMT APPROVER 2	>
Multiple Approvers       >         REC AMM APPROVER 3       >         re Purchasing Approval	⊠ Not Routed	+
q Purchasing Approval         Standardization Transaction       Awaiting Further Approval         Start New Path       Image: Comparison of the standard s	Multiple Approvers REQ AMT APPROVER 3	>
Standardization Transaction       Awaiting Further Approval         Start New Path       Req Purchasing Approval         Req Purchasing Approval       +         Multiple Approvers       >         D Approver       >         Start New Path       _         Start New Path       _         D Approver       _         Start New Path       _         D Approver       _         Start New Path       _         DAS-BID Approver       _         DAS-BID Approver       _         Multiple Approver       _         DAS-BID Approver       _         Multiple Approver       _         DAS-BID Approver       _         Multiple Approver       _         Multiple Approver       _	q Purchasing Approval	
Start New Path     Req Purchasing Approval   Image: Comparison of the start Approvance of the	Standardization Transaction	Awaiting Further Approvals
Req Purchasing Approval   I Not Routed   Multiple Approvers   REQ PURCH APPROVER   D Approver   Standardization Transaction   Start New Path   DAS-BID Approver   I Not Routed   I Not Routed	Start New Path	
Not Routed   Multiple Approvers   REQ PURCH APPROVER   D Approver   Standardization Transaction   Start New Path   DAS-BID Approver   In Not Routed   In Not Routed	Req Purchasing Approval	
Multiple Approvers   REQ PURCH APPROVER   D Approver   Standardization Transaction   Stand Ardization Transaction   Awaiting Further Approvals   Start New Path   DAS-BID Approver   I Not Routed   Multiple Approvers   DAS APPROVER1	▶ Not Routed	+
D Approver Standardization Transaction Start New Path CAS-BID Approver Not Routed Multiple Approvers DAS APPROVER1	Multiple Approvers REQ PURCH APPROVER	>
Standardization Transaction     Awaiting Further Approvals       Start New Path     As-BiD Approver       OAS-BID Approver     +       I Not Routed     +       Multiple Approvers     >	D Approver	
Start New Path   DAS-BID Approver   I Not Routed   Multiple Approvers   DAS APPROVER1	Standardization Transaction	Awaiting Further Approvals
DAS-BID Approver         I Not Routed         Multiple Approvers         DAS APPROVER1	Start New Path	
Not Routed +	DAS-BID Approver	
Multiple Approvers DAS APPROVER1	▶ Not Routed	+
	Multiple Approvers DAS APPROVER1	>



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 <u>Convert Requisition to a</u> <u>Procurement Contract</u> 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.