



Types of Requisitions: DAS-BID

A DAS-BID is a Requisition used to initiate the start of a Bid for procurement that is not on contract or replaces an expiring contract.

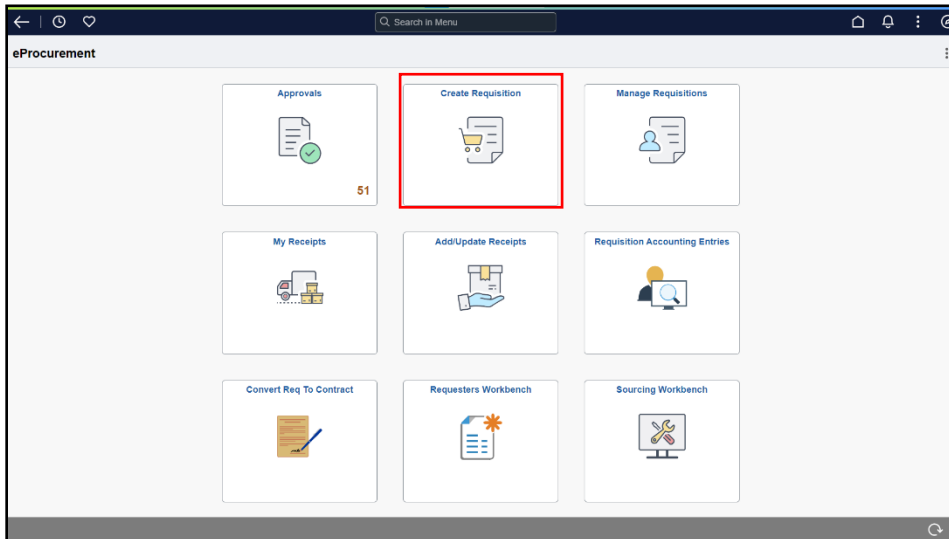
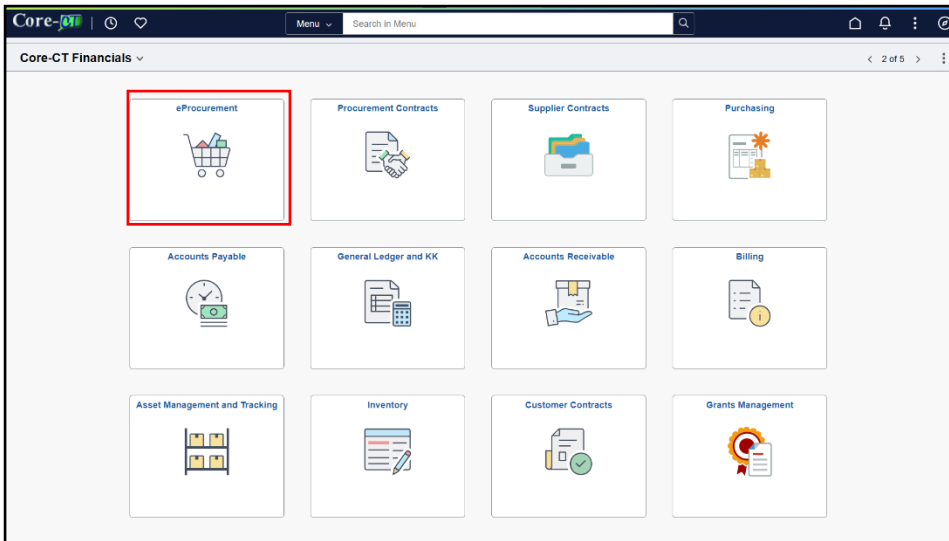
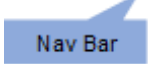
Navigation:

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



Or

Core-CT Financials > eProcurement > Create Requisition



1. Define Requisition Defaults:
 - a. Name the requisition or it will default to the requisition number.
 - b. Choose **DAS-BID** in the *Requisition Type* dropdown box.

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

- Header Defaults:**
 - Business Unit: MHAM1
 - Requester: YoungB (MHA-Young Barbara)
 - Priority: Medium
 - Currency: USD
 - Requisition Name: Test DAS_BID
 - Requisition Type: DAS-BID (highlighted with a red box)
 - DAS-BID Attributes (link)
- Line Defaults:**
 - Supplier ID: [empty]
 - Supplier Location: [empty]
 - Buyer: 007423
 - Category: 44000000
 - Unit of Measure: EA
- Shipping Defaults:**
 - Ship To: 0830000074
 - Attention: [empty]
 - Due Date: [calendar icon]
- Distribution Defaults:**
 - SpeedChart: [empty]

At the bottom, there is a table with columns: Distribution Line %1, Percent %1, Location %1, GL Unit %1, and Account %1. The first row contains: 1, 0, ACORE, STATE, and [empty].

- c. Click **DAS-BID Attribute**

This screenshot is similar to the previous one, but with the following changes:

- Requisition Name: Standardization Transaction
- Requisition Type: DAS-BID
- DAS-BID Attributes (link highlighted with a red box)

- d. Enter **Plan Start Date (required field)** at a minimum. Complete other fields with the information available.
- e. Click Done.

- f. Add **Buyer, Category, and UOM** to the Line Defaults.
- g. Add Chartfield information into the **Distribution Defaults**.
- h. Click Done.

Distribution Line %	Percent %	Location %	GL Unit %	Account %
1	0	ACORE	STATE	

2. Create Requisition:

- a. Click on the Special Requests link.
- b. Add the Quantity, Category, and Unit of Measure. (Leave the price blank)
- c. Click add to Cart.

Enter Item Description that starts with a Commodity Code Abbreviation. This helps DAS route the requisition to the correct DAS Contract Specialist. (Ex. NET-Cisco Routers)

Note: The Category, Unit of Measure, and Vendor ID fields pre-populate with values entered on the Requisition defaults page.

Here is an example of IT Commodity Code Abbreviations:

Commodity Code	Definition
HDW	Hardware
SFW	Software
NET	Network
TEL	Telecommunications
RAD	Radios
TRG	Training
MAIN	Maintenance
SMAIN	Software Maintenance
HMAIN	Hardware Maintenance
CON	Consulting
ITPS	IT Profession Service

d. There will be a warning message, click **Yes** if no price is entered.

The screenshot shows the 'Create Requisition' interface. A modal dialog box is displayed in the center with the following text: 'Is there no charge for line item? You must set the zero price indicator to 'Yes' when the item price is zero. Press 'Yes' if this is a no charge item. The system will set this item's zero price indicator to 'Yes'. Press 'No' to go back to the previous page to change the price.' The dialog has 'Yes' and 'No' buttons. The background form is dimmed, showing fields for Item Description, Price, Quantity, Category, Currency Code, Unit of Measure, Supplier Information, and Manufacturer Information.

Note: Repeat this process for all line items you wish to place on your requisition.

e. Click Checkout

The screenshot shows the 'Create Requisition' interface after the dialog box is closed. The 'Checkout' button in the top right corner is highlighted with a red box. The form fields are now visible and active, including Item Description, Price, Quantity, Category, Currency Code, Unit of Measure, Supplier Information, and Manufacturer Information.

1. Checkout:
 - a. Click on Header Comments

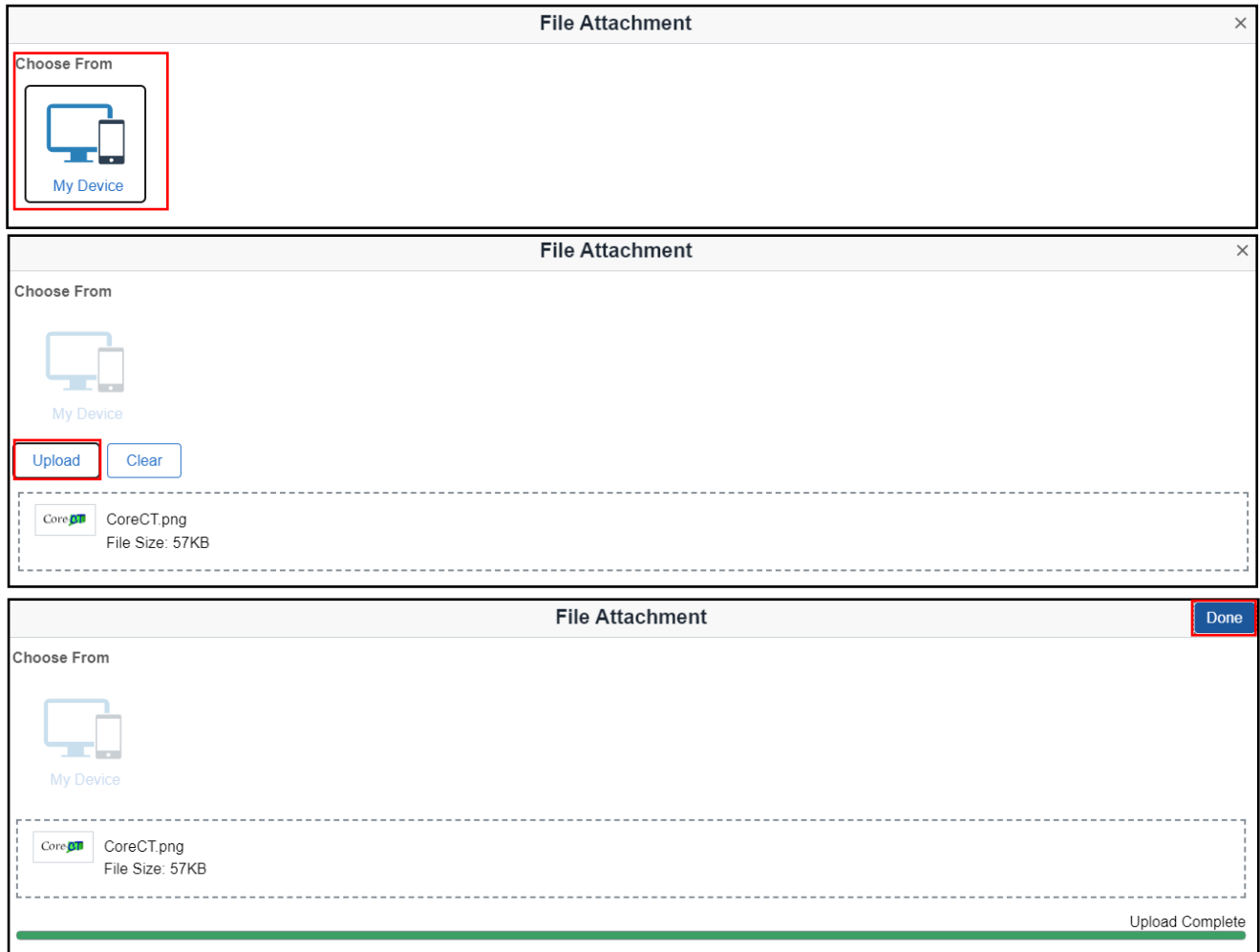
The screenshot shows the 'Create Requisition' checkout page. At the top right, there are buttons for 'Continue Shopping', 'Save', and 'Submit'. The 'Checkout' section includes a 'Requisition Summary' with fields for Business Unit (MHAM1 Mental Health & Addiction Serv), Requisition Name (Test DAS_BID), Requester (YoungB MHA-Young Barbara), Currency (USD), Priority (Medium), and Requisition Type (DAS-BID). A 'Header Comments' button is highlighted with a red box. Below this is a 'Justification Comments' text area. The 'Requisition Lines Overview' section shows a table with one line item: 'Line 1 Special Request' for 'IBM - For Red Hat Software'. The table columns include Quantity (1), Unit of Measure (EA), Price (0.00), Currency (USD), and Total (0.00 USD). A 'ScheduleDetails' button is visible next to the line item. The 'Order Total' is 0.00 USD.

- b. Click on the Add Attachment button.

The screenshot shows the 'Requisition Header Comments and Attachments' dialog box. It has 'Cancel' and 'Done' buttons at the top. The 'Comments' section includes a 'Use Standard Comments' button, a 'Comment Text' text area, and three checkboxes: 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher', each with a 'No' button. The 'Add Attachment' button is highlighted with a red box.

- c. Click on the Choose From button.
- d. Once the required DAS-BID Transaction Justification document is found, upload it by clicking on the Upload button.
- e. Click the Done button once completed to close the File attachment box.
- f. Click Done to close the Requisition Comments and Attachments box.

Additional attachments may be added by following the same steps



- g. Click the Submit button to initiate workflow.
- h. Press Okay to Save the Requisition

Create Requisition

Continue Shopping Save **Submit**

Checkout

Requisition Defaults

Order Total 0.00 USD

Requisition Summary

Business Unit MHAM1 Mental Health & Addiction Serv
Requisition Name Test DAS_BID
Requester YoungB MHA-Young Barbara
Currency USD
Priority Medium
Requisition Type DAS-BID
DAS-BID Attributes

Header Comments

Justification Comments

Requisition Lines Overview

Select All Actions

Line	Description	Quantity	Unit of Measure	Price	Currency	Total	Actions
Line 1	Special Request Item ID: For Red Hat Software Supplier	1	EA	0.00	USD	0.00 USD	ScheduleDetails > Line Comments Delete

Order Total 0.00 USD

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**

The requisition will now be in "Pending" status (see approval chain).

Checkout Confirmation

Print Preview

Requisition Details

Business Unit MHAM1
Requisition ID 0000038468
Requisition Name Test DAS_BID
Last Modified Date 05/09/2024 3:19:42PM
Status Pending Approval
View Approval Chain

Total Lines 1
Total Amount 0.00 USD
Budget Checked Status Not Checked
Bid NO: 24PSX0038
DAS-BID Attributes

Next Steps

- Edit this Requisition
Modify this requisition
- My Requisitions
Go to existing requisitions
- Create Requisition
Create another requisition

The Approval Workflow Confirmation page is displayed. The system assigns a Bid No on the confirmation page. The bid will be routed through the normal ePro DAS-Bid requisition approval process.

The image displays two screenshots of the 'Approval Flow' window, showing the status of various requisition approval steps. The top screenshot shows the 'Amount Approval' step as 'Pending', while the 'Req Budget Approval' and 'Req Purchasing Approval' steps are 'Awaiting Further Approvals'. The bottom screenshot shows the 'Amount Approval' step as 'Pending', the 'Req Budget Approval' and 'Req Purchasing Approval' steps as 'Awaiting Further Approvals', and the 'DAS-BID Approver' step as 'Not Routed'.

Step	Status
Amount Approval	Pending
Req Budget Approval	Awaiting Further Approvals
Req Purchasing Approval	Awaiting Further Approvals
BID Approver	Awaiting Further Approvals
DAS-BID Approver	Not Routed