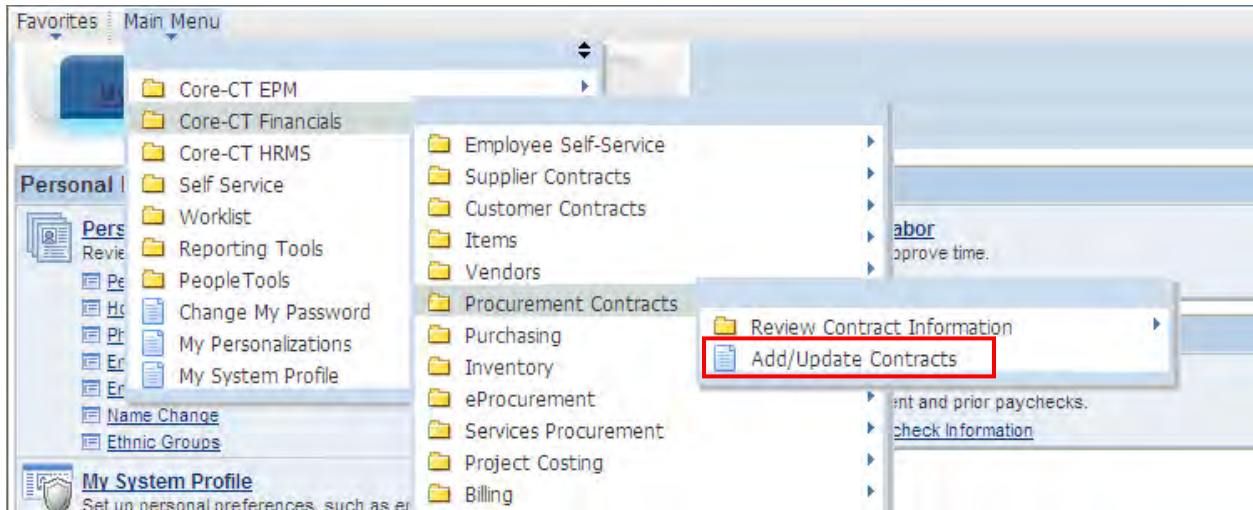## Contracts

Navigation: Main Menu > Core-CT Financials > Procurement Contracts > Add/Update Contracts.

The Contract Entry page will display, and the Add a New Value Tab will be active.
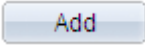
Manually enter the contract number in the Contract ID field using the Core-CT numbering schema: two numbers to represent the calendar year, three characters to represent the Agency, four sequential numbers to represent the contract number, and two alphas to represent the supplier.
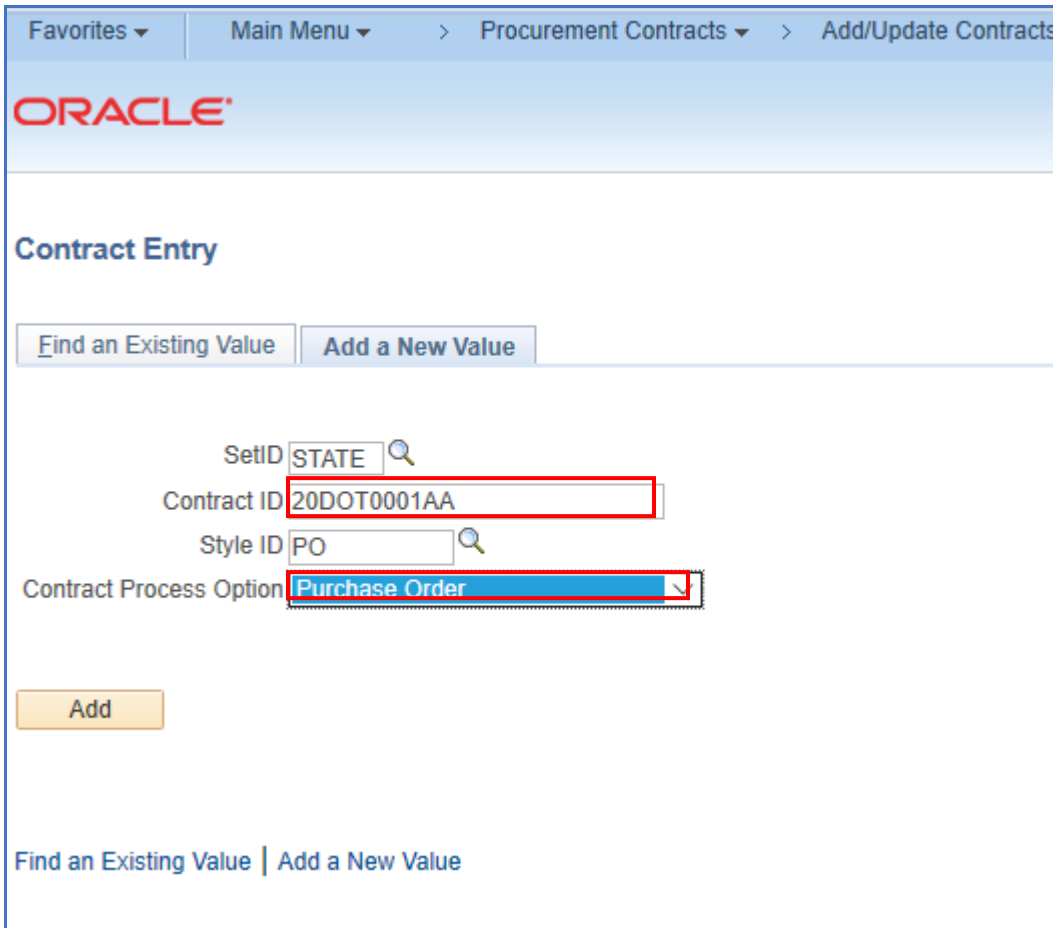
- The first 2 characters are numeric for the calendar year that the contract is being created in. For example, if the contract is being created in calendar year 2022, the numeric is 22.

- The three characters to represent the Agency: if this contract was being created by the Department of Transportation, the user would input DOT.

- The four sequential numbers represent the contract number, such as 0001, 0002 and such.

- The 2 alpha characters to represent the supplier. If more than one supplier is awarded this contract, these letters differentiate between suppliers. The first alphas used would be AA, followed by AB, AC, etc.

In this example the contract number would be: 22DOT0001AA. If there was an additional supplier awarded on this contract the next contract number to be used would be: 22DOT0001AB.

The use of this numbering schema will provide consistency of data entry for all state Business Units and will facilitate a standardized item loading process when items need to be loaded into the item master tables via the Catalog Management module.

For the **Contract Process Option**, select Purchase Order from the drop-down menu. (This will always be Purchase order)

Click the [Add] button.

| Favorites ▾ | Main Menu ▾ | > | Procurement Contracts ▾ | > | Add/Update Contracts |

ORACLE

Contract Entry

| Find an Existing Value | **Add a New Value** |

SetID STATE 🔍

Contract ID 20DOT0001AA
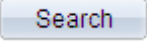
Style ID PO 🔍

Contract Process Option Purchase Order ▾

[Add]
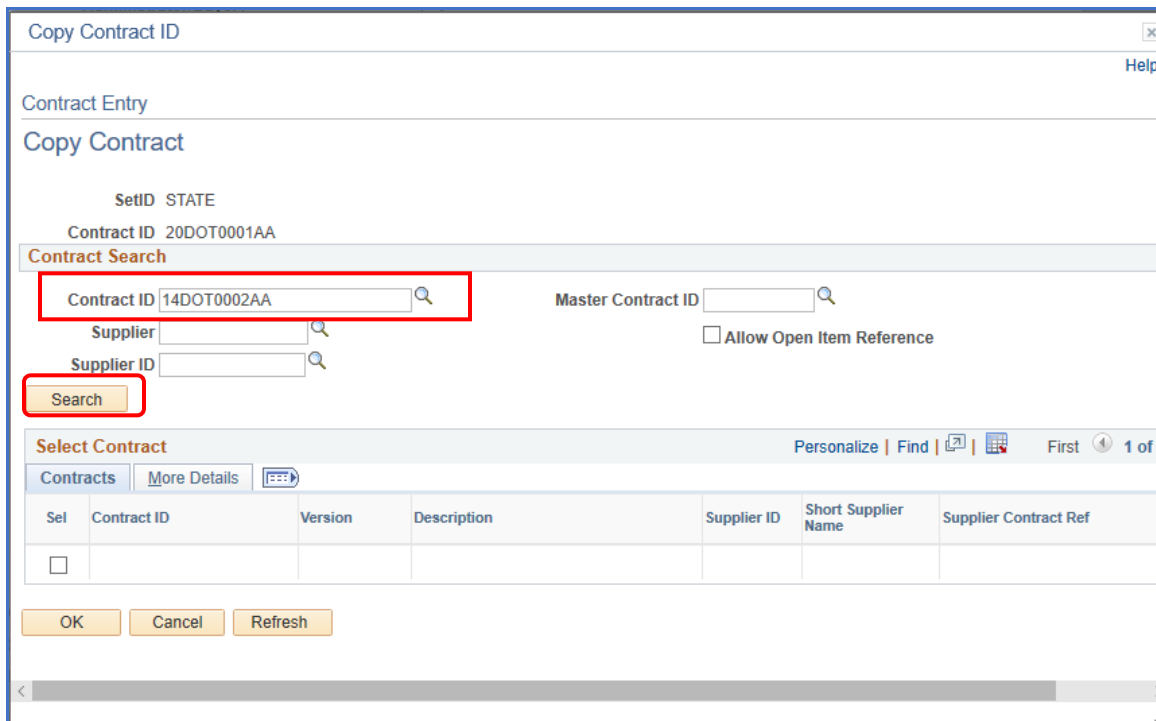
Find an Existing Value | Add a New Value

This will take you to the Contract Entry Page. The Contract Entry Page is comprised of five sections: The Contract, the Header, Order Contracts Options, Contract Items, and Contract Categories.

1. In the **Contract section**, you have the option to copy from a previously created contract. Click on Copy From Contract. If you are not going to copy from a contract, skip down to Status.

NOTE: The contract process option must be the same as the contract you are copying from (i.e. General to General or Purchase Order to Purchase Order).

This will open a new screen where you can search for an existing contract by Contract ID, Supplier, or Supplier ID. Use the search icon 🔍 to look for existing values. Once you have found the contract you are looking for, click Search.

This will bring the contract information down to the Select Contract section.
Check the box next to the contract, then click [OK] .

The information from the contract you selected has been copied over. Continue on and make any changes to the fields, if necessary.

Status: The status of the contract. Since this is a new contract, the status is Open.

Administrator/Buyer: The originator of the Contract. Enter in the employee's Core ID number or search by clicking the search icon.

Contract Version: We no longer utilize Contract Versioning. The Version will stay on whatever version it was on when we turned Contract Versioning off.

2. The following fields must be entered in the **Header** section:

CT Contract Type: There are several types of contracts for selection and this step is very important to identify correctly. Contract type has an impact on the PO type to be selected on your Purchase Order Header Details Page.

- **BU Award** - **Business Unit Award** is a contract that an agency establishes based on statutory purchasing authorities or delegated statutory purchasing authorities. DAS procurement could use this value if they are establishing a contract for a single agency to use (they would need to restrict the business unit to the agency that the contract was developed for on the PO defaults page).

- **Constr. - Construction** - a contract established by DOT, DCS or any agency that has a construction contract.

- **Grant** – is a grant award that is either budgeted or federally funded between the state and another entity such as another state agency, municipality or not for profit business.

- **Loan** - used by ECD for the purpose of tracking their loan related contracts.

- **MOU – Memorandum of Understanding** - used when an agency creates a contract previously known as a Memorandum of Understanding or Memorandum of Agreement.

- **POC Comp - POS Competitive** - used by the Social Service Agencies for their Purchase of Services contracts that *were competitively bid*. Once selected, an OPM Reporting link will become active for use in entering additional required contract   information. **OPM reporting requires users to enter all the lines for the services provided for this contract type.**

- **PON Noncom - POS Noncompetitive** - used by the Social Service Agencies for their Purchase of Services contracts that were *not competitively bid.* Once selected, an OPM Reporting link will become active for use in entering additional required contract information. **OPM reporting requires users to enter all the lines for the services provided for this contract type.**

- **PSC Comp - PSA Competitive** - used by any agency when Personal Service Agreement contracts that *were competitively bid.* Once selected, an OPM Reporting link will become active for use in entering additional required contract information. **OPM reporting requires users to enter all the lines for the services provided for this contract type.**

- **PSN Noncom - PSA Noncompetitive** - used by any agency when Personal Service Agreement contracts that were *not competitively bid.* Once selected, an OPM Reporting link will become active for use in entering additional required contract information. **OPM reporting requires users to enter all the lines for the services provided for this contract type.**

- **Rght of Wa - Rights of Way** - used by the DOT for their right of way contracts.

- **Rntl Lease - Rental Lease** - used for Building Leasing or Real Property contracts.

- **Statewide - Statewide Award** - used by DAS when creating a contract that all agencies can use.

- **MA – Master Agreement** - used to contract for goods or services resulting from an RFP (Request for Proposal)

- **GL – General Letter** - (GL71a, b, c, d, e , f, g) is used when GL is the delegated purchasing authority.

- **SCS – Statutory Contractual Services –** to be used by DAS, DCS, and DOT only for statutory contractual services.

- **UFA – Utility Force Account** - to be used by DOT for their Utility Force Account.

- **Stand Tran – Standardization Transaction** - to be used when requesting the waiver of the bid or proposal requirement in accordance with CGS 4a-58. **Approval must be obtained by DAS before using this value.**

Once a POC/N, PSC/N or SCS CT Contract Type is selected, the OPM Reporting link is activated. (See section 3 for details on OPM Reporting)

Supplier: Use the **Supplier Search** link to find the supplier to be associated with this contract.

Fill in any of the fields to retrieve the Supplier and then click **Search**.

Results returned will show in the Search Results view.

To view information about the supplier; place a check in the **Sel** checkbox and click **Supplier Detail** or **Address** .

Supplier Detail

SetID STATE	Supplier ID 0000010009	Supplier Status Approved
Short Supplier Name SUBURB3422-001		Supplier Classification Supplier
In City Limit N		HR Class
Additional Name		Persistence Regular
Alternate Supp Name		Open For Ordering Y
Address 00001 693 HIGH ST		Withholding Applicable N
Corporate Supplier 0000010009 SUBURBAN STATIONERS INC		Display VAT Flag N
Remit Supplier 0000010009 SUBURBAN STATIONERS INC		

Supplier Types   Personalize | Find | View All | | First 1 of 1 Last

Type	Long Name

[OK] [Cancel] [Refresh]

Address

SetID: STATE	Vendor ID:	0000010009
Country:	USA United States	
Address 1:	693 HIGH ST	
Address 2:		
Address 3:		
City:	MIDDLETOWN	
County:		Postal: 06457
State:	CT Connecticut	

[OK] [Cancel] [Refresh]

Click [OK] or [Cancel] to return you to the previous screen, so you can select the supplier for the Contract.

Supplier Search

Search Criteria

Name	suburban	Short Name	
Alternate Supp Name			
City		State	
Country		Postal	
Class		Type	
Max Rows	10		

Search   1 to 10 of 25

Search Results   Personalize | Find | View All | ☐ | ☐   First ◀ 1-4 of 10 ▶ Last

Sel	Supplier ID	Address	Short Supplier Name	Supplier Name	Withholding Applicable
☑	0000010009	1	SUBURB3422-001	SUBURBAN STATIONERS INC	N
☐	0000010291	1	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N
☐	0000010291	2	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N
☐	0000010291	3	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N

Supplier Detail   Address

OK   Cancel   Refresh

Select the vendor by placing a check in the **Sel** checkbox and click the

OK button. This will bring the supplier data onto the Contract Header page.

If the supplier does not exist in the Core-CT system, please contact OSC for the necessary forms to request an addition to the vendor file.

Continue entering Header Information:

Header

CT Contract Type:	POC Comp
Process Option:	Purchase Order
Vendor:	
*Vendor ID:	0000010009 SUBURBAN STATIONERS INC
*Begin Date:	01/14/2013
Expire Date:	01/14/2014
Renewal Date:	
Currency:	USD CRRNT
Primary Contact:	
Vendor Contract Ref:	
Description:	POC For Office Supplies
Master Contract ID:	
☐ Tax Exempt	

Add Comments   Activity Log
Contract Activities   Document Status
Primary Contact Info   Thresholds & Notifications

Contract Releases

Amount Summary

Maximum Amount:	100,000.00	USD
Line Item Released Amount:	0.00	
Category Released Amount:	0.00	
Open Item Released Amount:	0.00	
PCard Swipe Amount:	0.00	
Total Released Amount:	0.00	

Begin Date: The Begin Date of the contact defaults in with today's date. If you enter a future begin date, this contract will not be available for selection in the Contract ID field of Purchase Orders until the begin date.

Expire Date: This is the date that the contract ends. After that expiration date has passed, the contract is no longer available for selection in the Contract ID field of Purchase Orders. In the future, this field will also be used to archive data off the system.

Renewal Date: This field is optional. The date the contract is up for renewal.

Supplier Contract Ref: This field is optional. The field size is 30 characters.

Description: The Description field is optional for use. The field size is 30 characters. This field is viewable when searching the supplier contracts field in online PO creation. It is good practice to utilize the Description field.

Master Contract ID: This field is not used.

Tax Exempt: Do not update this field, it will default from the PO Defaults.

Maximum Amount: Enter the maximum amount that can be released and paid against this contract.

3. The following fields need to be entered or updated in the **Order Contracts Options** Section:

- If the contract that you are creating is <u>only</u> for your agency's use, uncheck the **Corporate Contract** checkbox (the Corporate Contract checkbox is used for DAS statewide contracting. Selecting this checkbox allows all Business Units to utilize the contract and the Business Unit on the PO Defaults link is set to DASM1).

- **Lock Chartfields** Do not check this field, this will **not** allow you to change values on the Distribution lines of your PO.

- The **Allow Open Item Reference** should **NEVER** be selected for POC/N, PSC/N or SCS contract types, if selected you will not be able to save the contract. For other contract types, selecting this checkbox would allow the purchase of all items from this vendor within the scope of the supplier contract.

- Select the **Price Can Be Changed on Order** checkbox; this will allow PO change orders to be created for POs associated with this contract.

For PSC/N and POC/N type contracts click on the OPM Reporting Link.

OPM Approval Number: If this was converted from a POS/PSA Requisition the Requisition Business Unit and Req ID will automatically populate. If there is an amendment or you are creating the contract manually, you will manually enter the Requisition Business Unit and Req ID.

- If your contract falls below the dollar thresholds, and OPM Approval is not required, type **Not Reqd** in this field.

OPM Contracted Entity: select entity from the dropdown menu.

OPM Statutory Reference: select reference from the dropdown menu.

CGS 13B-20B	Consultant Services, DOT
CGS 4A-50	Contractual Services
CGS 4B-55	Consultant Services, Construction
CGS 4D-2	Consultant Services, use w/contract type SCS only
Not Applicable	When the Statutory Reference is not one of selections listed above.

Please refer to the statutes for a more detailed explanation.

Click [OK] once you have entered data in the three required fields.

Click on PO Defaults (This is **mandatory**, even if you are not entering default coding here).

The PO Defaults page will open. Verify that your agency business unit has defaulted in the **Business Unit** field. *If DASM1 defaults in, you will need to change this to your agency's business unit.*

Your **AM Business Unit** may default in. If not, enter manually, only if an Asset is involved.

If your agency has multiple Business Units that should transact utilizing this contract, use the plus button to add additional Business Units that would have access to this contract.

You will see that the **Payment Terms ID** is populated with 000 (Due Immediately – No Discount). If your supplier has offered a different pay term, select the appropriate pay term from the list.

Look Up Payment Terms ID

Help

SetID STATE

Payment Terms ID begins with ▼
Short Description begins with ▼
Description begins with ▼
Payment Terms Type = ▼

[Look Up] [Clear] [Cancel] Basic Lookup

Search Results

View 100 First ◄ 1-130 of 130 ► Last

Payment Terms ID	Short Description	Description	Payment Terms Type
$DISC	Dollr Disc	Dollar Discount	Single
000	Due Now	Due Immediately - No Discount	Single
00312	.003/10-25	0.3% Disc In 10 Days Net 25	Single
00314	.003/10-45	0.3% Disc In 10 Days Net 45	Single
00522	.005/2025	0.05% in 20 Days Net 25	Single
00524	.005/2045	0.05% in 20 Days Net 45	Single
01012	.0010/1025	0.10% in 10 Days Net 25	Single
01014	.0010/1045	0.10% in 10 Days Net 45	Single
02412	.2451/1025	0.2451%Disc In 10 Days Net 25	Single
02414	.2451/1045	0.2451%Disc In 10 Days Net 45	Single
025	Net 25	Net 25 - No Discount	Single
02502	.0025/1025	0.25% in 10 Days Net 25	Single
02504	.0025/1045	0.25% in 10 Days Net 45	Single
02510	.0025/1030	0.25% in 10 Days Net 30	Single
02512	.0025/1525	0.25% in 15 Days Net 25	Single
02513	.0025/1530	0.25% in 15 Days Net 30	Single
02514	.0025/1545	0.25% in 15 Days Net 45	Single
02522	.0025/2025	0.25% in 20 Days Net 25	Single

If your PO from this contract is to be amount only, then you would need to change the Charge By field from Quantity to Amount.

Do not enter Chartfield information on the PO defaults page. Enter it directly on the distribution for each contract line that is entered.

Click **OK**

You will return to the Contract Entry Page.

4. Go to **Contract Items**.

Enter a clear description of 10 words or less of the good or service contracted for in the **Description** field (max 254 characters). Agencies can reference their program tree to assist in a standard description.   For PSC/N, POC/N and SCS CT Contract Types, these are required fields. You will not be able to save your contract if these fields are not entered. Add an additional line for each contracted service.

(To view the entire description, click. This will open an expaned window view.)

Contract Entry

⑦ Help

Copy Paper Blue, 8.5x11, 500 sheets per ream, 10 reams per case - 20# weight

Return

Click **Return** to return back to Contract Entry

Enter the **UOM** - Unit of Measure. This field must be entered.
Click on the magnifying glass to choose from the list.

Enter the correct **Category**. This will bring in the account on the PO. This can be changed if necessary. **Use of the category 00000000 or CT_UNSPSC is unacceptable on any contract, PO or requisition. These values were included for use by requesters on requisitions if they did not know the correct category. It is the responsibility of the Approvers to apply the correct category code.**
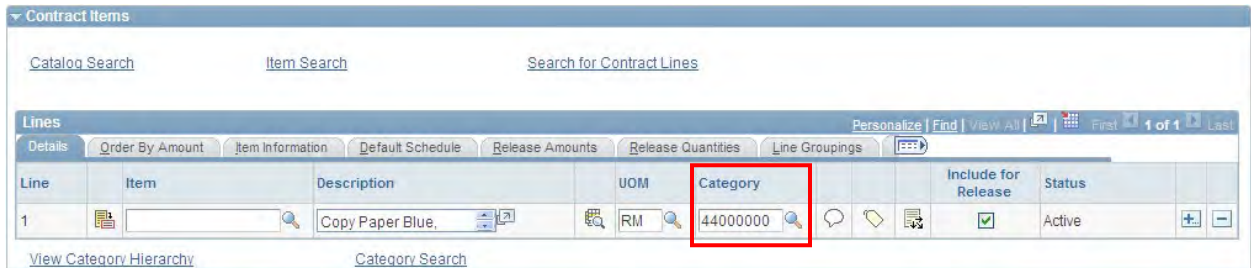
Click the **Line Details** Icon to access all tabs.
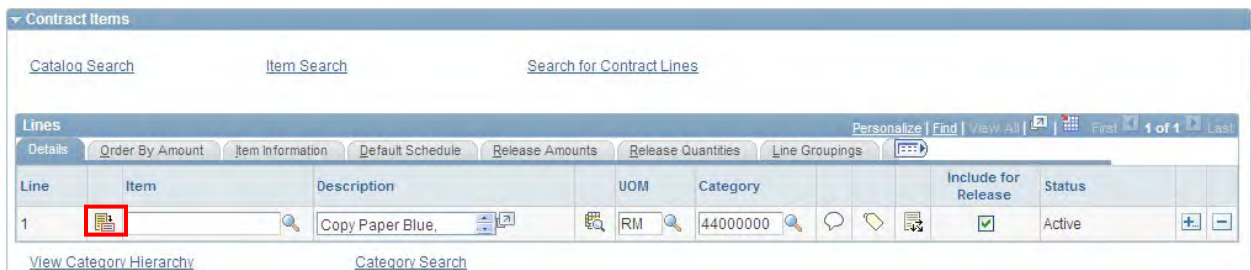
Select Expand All to view all tabs on one page.

- Enter the Maximum line amount if applicable
- Leave the Minimum and Maximum line quantity blank

Select the appropriate choice (goods or services) in the **Physical Nature** field

Place a check in the checkbox for Price Can Be Changed on Order.

FOR AN AMOUNT ONLY CONTRACT:

Order by Amount - If this is amount only, check the Amt Only checkbox. *Reconfirm that you have selected Amount in the Charge By field on the PO Defaults.*

Merchandise Amt - enter the amount for the line.

FOR A QUANTITY CONTRACT:

UOM/Pricing – enter a **Base Price** equal to the price for this line

Enter MAIN for the **Price Loc** (Pricing Location).

Click OK .

You will be returned to the Contract Header Page.

Repeat the steps above for each contract line entered.

Click on the **PO Distributions Details** icon.

Fill in the appropriate chartfield information here.

Select + to add additional distribution lines.

Repeat this step for each contract line entered. It is mandatory that agencies enter Chartfield values on the distribution line for each line of the contract.

This will copy to the PO when utilizing the Copy from Contract feature when creating an online purchase order.

Click [OK] when you are done

You will be taken back to the Contract Page.

Place the contract in approved status by updating the **Status** field if you have the authority to do so. If you do not have the authority to approve a contract, leave the contract in Open status and contact the appropriate person in your agency who can approve this contract.

Click [Save] to save the contract.

Updated 08/25/2022