



State of Connecticut
DAS – Procurement Services



CTsource Training 4 Document Library

April 7, 2021

Welcome to CTsource Training 4: Document Library. This is the fourth training provided to you by the State of Connecticut – DAS Procurement Services CTsource Training Team.



CTsource Training 4



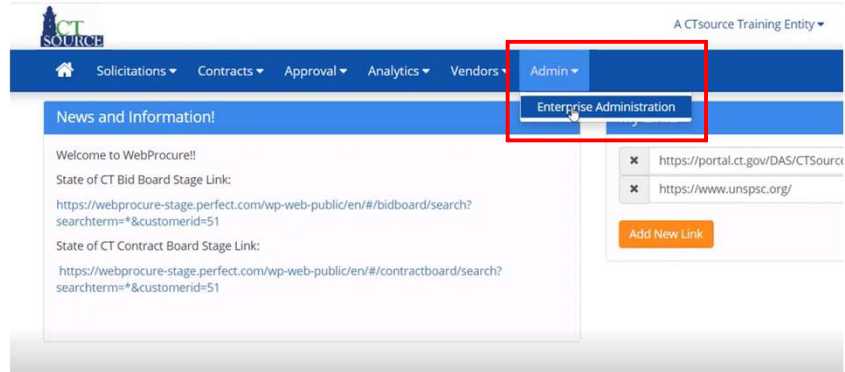
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During this training, we will recap the Enterprise Administrator role/responsibilities and will demonstrate the Document Library functionality available to you as an agency.

You may follow along with the PowerPoint slides. Each of the sections is hyperlinked, simply press Ctrl key on your keyboard and click your mouse to follow link. The page numbers (slide numbers) are listed as well. At the bottom of the screen you will find “breadcrumb” tabs in the ribbon: Enterprise Admin Role and Document Library. When a new section begins, the color of the tab will change and will indicate which section you are in.



Enterprise Administrator Role



We will be demonstrating the information logged into “A CTsource Training Entity” in the Stage Environment.

As an administrator, the way to access any of the user information, document libraries, etc., you will need to go first to the Admin dropdown menu. From the *Admin* dropdown menu, click on *Enterprise Administration*.

[DEMO]



Enterprise Administrator Role



The screenshot displays the CT SOURCE Enterprise Administrator interface. At the top, there is a navigation bar with a home icon and several menu items: Solicitations, Contracts, Approval, Analytics, Vendors, and Admin. Below this, the left sidebar contains two main sections: 'Organizations' and 'Administration Menu'. The 'Organizations' section shows 'A CTSource Training Entity' with options for 'Hierarchical View / List View'. The 'Administration Menu' is expanded, showing a list of administrative tasks such as Organization Information, Workflow, Users, Suppliers, Configure Documents, Bill To Addresses, Ship To Addresses, Budget Codes, Contact Configuration, Address Configuration, Document Tools, and Invoice Configuration. The main content area on the right shows 'Organization: A CTSource Training Entity' and 'Action:'. Below this, a light blue box contains the text: 'Welcome to the Administration Tool Entry Screen. Please select an Organization and then an Action from the Menus on the left.' At the bottom of the interface, there is a blue footer bar with 'CTSource Training 4' on the left, 'Enterprise Admin Role' in a green button in the center, 'Document Library' in a grey button on the right, and the number '4' in the bottom right corner.

On the left side, Organizations appear. Click on your organization, so it populates on the right hand side; the menu options are then activated below in the *Administration Menu*.

[DEMO]



Enterprise Administrator Role



The screenshot shows the CT SOURCE Administration Tool Entry Screen. The left sidebar contains the 'Administration Menu' with the following items: Organization Information, Workflow, Users, Suppliers, Configure Documents, Bill To Addresses, Ship To Addresses, Budget Codes, Contact Configuration, Address Configuration, Document Tools, and Invoice Configuration. A red arrow points to the 'Administration Menu' header. The main content area displays a welcome message: 'Welcome to the Administration Tool Entry Screen. Please select an Organization and then an Action from the Menus on the left.' The footer contains 'CTSource Training 4', 'Enterprise Admin Role', 'Document Library', and the page number '5'.

The sub-org admin role, provides you access to various options under the *Administration Menu*. Depending upon your permissions, the admin role will allow you to perform functions under the first five menu options:

1. Organization Information - The information in each one of these options is only for your organization and you can only affect your sub-org
2. Workflow – This can be set up if your org decides to bring workflow into solicitations and contracts
3. Users – To edit users, create new users, change password information
4. Suppliers – To add, edit or approve supplier information
5. Configuration Documents – There are several sub-menu functions that allow you to affect configurations in the solicitation and/or contract documents

[DEMO]



Enterprise Administrator Role



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Enterprise Admin Role

Document Library

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Under *Configure Documents*, you will find options to: Manage Document Libraries, Manage Document Types, Manage Field Library, Document Field Mapping and Manage Questionnaire Library. Many of these options should be explored in the Stage environment prior to implementing in Production.

[DEMO]



Document Library



This training session we will demonstrate how to manage the document libraries for both solicitations and contracts. Click on *Configure Documents*. Select *Manage Document Libraries*.

[DEMO]



Document Library



For your staff to have continuous access to your organization's templates, this is where documents are housed. Keep in mind that there are two document libraries involved: *Contracts Library* and *Solicitation Library*.

[DEMO]



Document Library



Organization: A CTSource Training Entity Action: Manage Document Libraries

Contract Library Solicitation Library

Manage Contract Document Library

All Documents Active Documents Archive Documents Meta Info Upload New Document

Showing 1-0 out of 0 Search...

Type	Name	Uploaded On	Archived On	Allow Sub-Organization Use	Action
There are no documents available.					
0 Documents					

To upload templates into the *Contract Document Library*, click on the *Upload New Document* button. Uploading new documents is the same process in every function in WebProcure. By clicking on the *Upload New Document* button, you will be taken to your desktop where you may select a document to upload by either “double-clicking” on the file or selecting the file and clicking *Open*.

[DEMO]



Document Library



A CSource Training Entity

Solicitations Contracts Approval Analytics Vendors Admin

Organization: A CSource Training Entity Action: Manage Document Libraries

File Uploaded Successfully

Manage Contract Document Library

All Documents Active Documents Archive Documents Meta Info Upload New Document

Showing 1-1 out of 1

Type	Name	Uploaded On	Archived On	Allow Sub-Organization Use	Action
Active	SOLICITATION-MODULE-QUICK-GUIDES.pdf	Mar 03, 2021	N/A	No	?

1 Documents

WebProcure will alert you when you have successfully uploaded a document.

[DEMO]



Document Library



Organization: A CTSource Training Entity Action: Manage Document Libraries

Contract Library Solicitation Library

Manage Contract Document Library

All Documents Active Documents Archive Documents Meta Info Upload New Document

Showing 1-1 out of 1

Type	Name	Uploaded On	Archived On	Allow Sub-Organization Use	Action
Active	SOLICITATION-MODULE-QUICK-GUIDES.pdf	Mar 03, 2021	N/A	No	

You will be able to see on the left, that the document is *Active*. You will also be able to see the name of the document and the date the document was uploaded. Typically, there would be no sub-organizations nested under your organization, and the *Allow Sub-Organization Use* defaults to *No*. However if you are a sub-org with additional sub-orgs that fall below you may allow access to your documents to them if applicable.

[DEMO]



Document Library



Organization: A CSource Training Entity Action: Manage Document Libraries

Contract Library Solicitation Library

Manage Contract Document Library

All Documents Active Documents Archive Documents Meta Info Upload New Document

Showing 1-1 out of 1 Search...

Type	Name	Uploaded On	Archived On	Allow Sub-Organization Use	Action
Active	SOLICITATION-MODULE-QUICK-GUIDES.pdf	Mar 03, 2021	N/A	No	<ul style="list-style-type: none">DownloadArchiveDelete

1 Documents

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From the *Actions* menu, you have three options: *Download*, *Archive*, and *Delete*. If you would like to download the document, select *Download* (this is the same as clicking the document name hyperlink). The document will download to your desktop and you may save it from there.

You may also choose to archive the document, should you want to have the version of the document for future reference or you may choose to *Delete* the document. There is no option to “undo” a deleted document.

[DEMO]



Document Library



Organization: A CTSource Training Entity Action: Manage Document Libraries

Contract Library Solicitation Library

Manage Contract Document Library

All Documents Active Documents Archive Documents Meta Info Upload New Document

Showing 1-1 out of 1 Search...

Type	Name	Uploaded On	Archived On	Allow Sub-Organization Use	Action
Active	SOLICITATION-MODULE-QUICK-GUIDES.pdf	Mar 03, 2021	N/A	No	Download, Archive, Delete

1 Documents

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You may have noticed the three tabs: *All Documents*, *Active Documents*, and *Archive Documents*. Once you click on one of the tabs, the listing on documents will populate for each status, and you will be able to download, archive or delete as needed.

NOTE: All document types are able to be uploaded; however, templates requiring buyers to track changes should be uploaded as Word Documents. This will allow buyers to download the template from CTSource to their computer, make necessary edits, and upload into the solicitation or contract as necessary.

[DEMO]



CTsource Training 4



This concludes Training 4.

Please be sure to go to <https://portal.ct.gov/DAS/CTSource/CTSource> to find recordings of all trainings.

For any questions after the webinar contact DAS Procurement Services by emailing: das.ctsource@ct.gov

Thank you!