



**State of Connecticut, Department of Administrative Services  
CTsource Training Session 4: Document Library**

**Below is a list of the questions and answers submitted during CTsource Training Session 4: Document Library on April 7, 2021.**

| <b>Question</b>  | <b>Answer</b>   |
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| Will agencies have access to a tutorial/User Guide on the CTSource Document Library?                                       | Yes, all guides, videos and question and answer documents will be available on the CTsource Resources page ( <a href="https://portal.ct.gov/DAS/CTSource/CTsource-Resources">https://portal.ct.gov/DAS/CTSource/CTsource-Resources</a> ). Additionally, there are several guides available through the Proactis Help Center when logged into your account.  |
| Can documents be loaded in PDF format or only in Word?   | Multiple document formats are supported including: CSV, DOC, DOCX, DOT, DOTX, GIF, JFIF, JPEG, JPG, ODS, PAGES, PDF, PNG, PPS, PPT, PPTX, TXT, XLS, XLSX, ZIP   |
| Is there a maximum number of documents to be downloaded?   | No, however, the maximum file size for solicitation is 80MB per file, contract is 50MB per file.  |
| With the new system will you be updating the commodity categories as well?   | The United Nations Standard Products and Services Codes (UNSPSC) is a global standard. Any updates would be implemented system wide by the Proactis Team.   |
| Please show navigation to upload contract documents created outside of CTSource.   | To add documents that do not already exist in the organization's library, click Add New Document. The Upload Document window opens. Click the Browse or Choose File link, depending on your browser, and navigate to the local or network location of the document that is to be attached. From the Choose File to Upload window, select the document and click Open. Repeat these steps for each document that you would like to attach.   |
| Do you need to have admin roles to issue a contract?   | The Buyer role allows users to post a solicitation or contract. Administrators may have the Buyer role in addition to the Administrator role.   |
| How do you edit a document or add a document to an existing contract?  | Create an Amendment, go to the Documents page and add/ delete as necessary. To add documents that do not already exist in the organization's library, click Add New Document. The Upload Document window opens. Click the Browse or Choose File link, depending on your browser, and navigate to the local or network location of the document that is to be attached. From the Choose File to Upload window, select the document and click Open. Repeat these steps for each document that needs to be attached. |
| Is Value required on each contract?  | A value is required. However, an actual figure is not necessary if "No Limit" is selected.  |
| For migrated contracts, is the amendment function used to upload contract documents that were previously posted in Biznet? | If the migrated contract is in the status "Not Submitted" you may add documents or make edits within the contract pages in Edit mode. If the migrated contract is "Active" an amendment is required to make any changes to the contract.  |



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| <p>How is supplier approval handled?</p>  | <p>Please refer to the guidance document provided. Once all supplier profile requirements are met, simply click Approved under Supplier Status. Propagate as necessary. State agencies shall follow the same process as Binet when adding supplier with OSC and Core.</p> |
| <p>Will there be additional training for new staff or administrative roles training?</p>  | <p>All videos and supporting training documents will continue to be available on the CTsource Resources Webpage, in addition to, the guides available and maintained within the Proactis Help Center.</p>   |
| <p>Is each agency responsible for approving suppliers? For example, if I approve a supplier would that supplier be approved for other agencies to utilize them to issue a contract?</p> | <p>Yes, each organization will be approving suppliers. Once approved, all organizations will have the ability to award to the supplier.</p>   |
| <p>I will need instructions for migration.</p>  | <p>Please contact <a href="mailto:das.ctsource@ct.gov">das.ctsource@ct.gov</a> to request instructions and guidance.</p>  |
| <p>Regarding the public/private toggle for uploaded documents... Aren't all state contracts supposed to be "public"?</p>  | <p>The Public/ Private toggle on the Documents tab allows you to maintain revised versions of a document by switching to private. This also is done for audit purposes. Any finalized document posted to the public Contract Board will show public.</p>                  |
| <p>When doing solicitations, are we required to upload into the Document library?</p>   | <p>No, Document Library is a tool to assist with document control or templates. It is not required.</p>   |
| <p>The CORE Contract Management System also has a contract document library, would similar documents added to that library be added to this one as well?</p>                            | <p>You may add these documents to the CTsource library if they are required for solicitation and/or contracts for your org. It is up to each org whether or not the use the library functionality.</p>  |
| <p>Will you be adding common forms and templates for all agencies to use, so there is consistency throughout the agencies, such as the RFP Template?</p>                                | <p>The library functionality is management by your org administrator and is optional to use in CTsource.</p>  |
| <p>If contracts were not merged are there step by steps instructions to follow? (I know Geri just quickly gave instructions)</p>  | <p>Please contact <a href="mailto:das.ctsource@ct.gov">das.ctsource@ct.gov</a> to request instructions and guidance.</p>  |