



State of Connecticut
DAS – Procurement Services



CTsource Training 3

Contracts/Master Agreements

January 27, 2021

Welcome to CTsource Training 3: Contracts/Master Agreements. This is the third training provided to you by the State of Connecticut – DAS Procurement Services CTsource Training Team.



CTsource Training 3



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Utilizing Contract Management functionality	3
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Utilizing Master Agreements	43
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During this training, we will cover creating a contract, contract management functionality and utilizing contract notifications/reminders, and attaching documents. This training will also cover functionality for Utilizing Master Agreements which includes creating solicitations from Master Agreements, evaluating and awarding.

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: Contract Management and Master Agreements. When a new section begins, the color of the tab will change and will indicate which section you are in.



Contract Management



State of Connecticut

Solicitations ▾ Contracts ▾ Approval ▾ Analytics ▾ Vendors ▾ Admin ▾

News and Information

Welcome to WebProcure

State of CT Bid Board Stage Link:
<https://webprocure-stage.perfect.com/wp-web-public/en/#/bidboard/search?searchterm=&customerid=51>

State of CT Contract Board Stage Link:
<https://webprocure-stage.perfect.com/wp-web-public/en/#/contractboard/search?searchterm=&customerid=51>

My Links

Add New Link

CTSource Training 3 Contract Management Master Agreements 3

From the *Contracts* dropdown menu, you may *Create New*, *View Current*, *View Archived*, and perform a *Contract Search* to review and manage a contract.

[DEMO]



Contract Management



The screenshot displays the CT SOURCE web application interface. At the top left is the Connecticut State seal. The main header features the CT SOURCE logo and the text "State of Connecticut". Below this is a navigation bar with tabs for Solicitations, Contracts, Approval, Analytics, Vendors, and Admin. The Contracts dropdown menu is open, showing options: "Create new", "View Current", "View Archived", and "Contract Search (NEW)". A red arrow points to "View Current" in the dropdown and another red arrow points to "Contract Search (NEW)". Below the dropdown is a "News and Information" section with a link to "State of CT Bid Board Stage" and its URL. To the right is a "My Links" section with an "Add New Link" button. The footer contains "CTSource Training 3", "Contract Management" (highlighted in green), "Master Agreements", and the page number "4".

To search for a contract, start from the *Home* screen. Select *View Current Contracts* from the *Contracts* dropdown menu OR select *Contract Search*.



Contract Management



The screenshot displays the Contract Management interface. At the top, there is a search bar labeled "Contract Search" with a "Search by keyword" input field. To the right of the search bar are filters for "Issued/Active/Expired Date Range" (set to "No date selected"), "Contract Admin" (set to "Lisa Rol..."), "Organization" (set to "All"), and "Authorized Organization" (set to "All"). A "Search" button and a "Reset" button are located to the right of these filters. Below the search bar, there are three filter sections: "Applied Filters" (No filters are applied yet), "Status" (Unissued (5)), and "Contract Type" (Goods and Services Contract (5)). The main content area shows a list of contracts. The first contract is "2020FY10001-01 | 2020_Training 3_Sample Contract for Services" with a "100%" completion indicator. The contract details include "No Description available !!", "Nov 18, 2020 to Nov 17, 2021", "Status: Unissued | Do not dispatch", and "ABC Company". A "Tags" section shows "#Private". A context menu is open over the contract card, listing actions: Edit, Copy, Print, Delete, Contract History, Contract Release, and Generate Procurement Profile. The bottom navigation bar includes "CTSource Training 3", "Contract Management" (highlighted), "Master Agreements", and a page number "5".

To search for and find a contract to *Edit, Copy, Print, or Delete*, use the *Contract Search* fields to enter search criteria or applying filters. Hover over icons or symbols to view their meaning.

Once you locate the contract, click the three vertical dots and choose an action from the pop-out window.

[DEMO]



Contract Management



State of Connecticut

Solicitations ▾ Contracts ▾ Approval ▾ Analytics ▾ Vendors ▾ Admin ▾

News and Information

Welcome to WebProcure

State of CT Bid Board Stage Link:
<https://webprocure-stage.perfect.com/wp-web-public/en/#/bidboard/search?searchterm=&customerid=51>

State of CT Contract Board Stage Link:
<https://webprocure-stage.perfect.com/wp-web-public/en/#/contractboard/search?searchterm=&customerid=51>

My Links

Add New Link

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To create a contract directly in the Contract Module (that is not a result of a solicitation), start from the *Home* screen, select *Create new* from the *Contracts* dropdown menu. **[DEMO]**



Contract Management



Home Solicitations Contracts Approval Analytics Vendors Admin

Contract - Header Information

Header Notifications Contract Clauses Catalog Items Attachments Authorization

Please enter the information requested below. Then click the Next Step button to proceed.

General Information

Contract Type *	Contract Number *
--Select One--	<input type="text"/>
Contract Visibility*	Status
Private	Unissued
Title *	
Detailed Description	

The *Contract – Header Information* page opens. The system requires you to step through each section within the contract navigation bar. All fields with an * (asterisk) are required.

[DEMO]



Contract Management



Contract - Header Information

Header | Notifications | Contract Clauses | Catalog Items | Attachments | Authorization

Please enter the information requested below. Then click the Next Step button to proceed.

General Information

Contract Type * Contract Number *

Contract Visibility* Status

Title *

Detailed Description

Master Contract Do not dispatch Contract Enable Contract as RoundTrip P-Card Accepted

Contract Administrator * Email Address Organization

Req Number Solicitation Number

Environment STAGE :112.6.4

CTSource Training 3

Contract Management

Master Agreements

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Select *Contract Type*; enter *Contract Number*.

WebProcure defaults to *Contract Visibility**: *Private*; if the contract should be displayed on the Contract Board change to *Public*.

Notice the *Status* is *Unissued*. This contract will remain in the *Unissued* status until it is submitted and approved (and based on approval workflow).

Enter the title of the contract in the *Title* field and a description for the contract in the *Detailed Description* field.

Select appropriate identifiers, for example if P-Card is accepted as payment for this contract. NOTE: Dispatch Contract refers to emailing the contract to the supplier's contact identified in their profile.

WebProcure defaults to your name as Contract Administrator, but you may select another name within your organization using the dropdown menu.

[DEMO]



Contract Management



The screenshot illustrates the process of selecting contract commodities. It shows three main components:

- Top Left Window:** A 'Commodities' window with a 'Commodities' button. A red arrow points from this button to the 'Select Contract Commodities' window.
- Top Right Window:** A 'Select Contract Commodities' window with a search bar containing the word 'training'. Below the search bar are 'Search' and 'Clear search' buttons. The window is divided into two columns: 'Applicable Commodities' and 'Selected Commodities'.
 - Applicable Commodities:** A list of various training services with checkboxes, such as 'Safety training services (86131302)', 'Teacher training services (86131710)', and 'Specialized educational services (86130000)'. The 'Specialized educational services' category is expanded, showing sub-categories like 'Specialized educational services (86130000)' and 'Training planning, facilitation and delivery services (86132100)'. The 'Training planning, facilitation and delivery services' sub-category is further expanded to show 'Training planning and development consultancy service (86132102)'. A red arrow points from this sub-category to the 'Selected Commodities' column.
 - Selected Commodities:** A list of the selected items, including 'Education and Training Services (86000000)', 'Specialized educational services (86130000)', and 'Training planning, facilitation and delivery services (86132100)'. A red arrow points from the 'Close' button at the bottom right of this window to the 'Commodities' window below.
- Bottom Left Window:** A 'Commodities' window showing the 'Selected Categories' populated from the previous window. The categories listed are:
 - Education and Training Services (86000000)
 - Specialized educational services (86130000)
 - Training planning, facilitation and delivery services (86132100)
 - Training planning and development consultancy service (86132102)

Click on *Commodities* and the *Select Contract Commodities* window opens.

Type in keyword. Click *Search*. Find and select appropriate description/code. Include any and all header category codes to aid with any future contract search.

Click *Close*. The *Selected Categories* will populate in the *Commodities* window.



Contract Management



Contractor *

Search Contractors

Name
ABC Company

DUNS

Supplier Search

Supplier Name *
ABC Company

Advanced

Search **Cancel**

Supplier	Doing Business As	Relevance	Action
ABC Company	--	80%	
ABC Co.	--	35%	
Calamari Recycling Company Inc.	Same	35%	
Yiping and Company	YPO	35%	
XYZ Companies	--	1%	

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Click *Search Contractors* and search for contractor/supplier. Contractor must be registered in CTsource and approved.

Type in the *Supplier Name* field. Click *Search*. From the results, select the supplier by clicking on the *green checkmark*.

[DEMO]



Contract Management



Contact Type	Contact Name	Email Address	Phone
Main Contact	Mary Smith	julie.bernosky@ct.gov	860-713-5142
Contract Contact	Mary Smith	julie.bernosky@ct.gov	8607135142
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

The main and contract contacts from the Supplier portal will automatically fill, if available. Only the supplier can modify this information on their portal.

You may enter any additional contact information by completing the fields: *Contact Type, Contact Name, Email Address, and Phone*. Click *Add Contacts*.

Add or delete as necessary and additional contact information you have added. (You may delete a contact by clicking the red "x" at the right.)

[DEMO]



Contract Management



Insurance Category	Policy Number	Carrier	Effective Date	Expiration Date
--Select One--			Select Date	Select Date
Add Insurance				

Insurance Category	Policy Number	Carrier	Effective Date	Expiration Date
General Liability	12345678-0012	American	11/23/2020	11/22/2021
--Select One--			Select Date	Select Date
Add Insurance				

Insurance related to the contract is added and managed only at the contract level. This information is not required to complete; however, if you enter values in one of the fields, you must complete all fields in the row.

To identify an *Insurance Category*, select from the dropdown: *General Liability*, *Automotive Liability*, *Professional Services Liability*, or *Other*. Click on the dropdown menu and make your selection.

Enter the *Policy Number* and *Carrier* name if you feel it is necessary for your organization to track this information. NOTE: DAS Procurement Contract Specialists only enter an * in the fields to satisfy the system requirement for entry.

Enter the *Effective Date* and *Expiration Date* in the appropriate fields. NOTE: Email notifications are sent to the buyer and supplier regarding expiration date information.

Click *Add Insurance* when finished with a row to add all appropriate insurance policies.

[DEMO]



Contract Management



Pricing Information

Pricing Type * Fixed Price	Hide Contract Value : No
Total Value Condition * Fixed	Total Value (USD) 50,000.00
Retainage Type : On	Retainage Notes Retainage amount of \$10,000.00 will be paid to Supplier upon receipt of final invoice after all deliverables have been accepted and approved.
Retainage Amount (USD) 10,000.00	

Pricing Information:

Select *Pricing Type* and *Total Value Condition* from the dropdown menus. Select *Yes/No* to *Hide Contract Value* – this determines whether or not it is displayed on the Contract Board
Enter *Total Value (USD)* – if using approval workflow based upon Total Contract Value Workflow, a value must be entered in this field.
Determine *Retainage Type* [Off/On] represent amount versus percentage, enter *Retainage Amount or Percent* as applicable and *Retainage Notes*. You may enter data in these fields for information purposes only. The State of Connecticut does not use the payment module to enforce this information.

[DEMO]



Contract Management



The screenshot shows a web form for contract management. It includes the following fields and annotations:

- Initial Expended Value (USD)**: A text input field containing "0.00". A red arrow points to this field.
- Cumulative Expended Value (USD)**: A text input field containing "0.00".
- % Value To Go**: A text input field.
- Payment Terms ***: A dropdown menu with "Net 45 Days" selected. A red arrow points to this dropdown.
- Payment Notes**: A text area containing "Standard Net 45 days." A red arrow points to this text.
- Delivery Terms ***: A dropdown menu with "N/A: Not Applicable" selected. A red arrow points to this dropdown.
- Delivery Notes**: A text area containing "Service delivery". A red arrow points to this text.
- Other Notes**: A large text area. A red arrow points to this area.

At the bottom of the form, the text "Environment STAG" is visible.

Pricing Information (continued):

The *Initial Expended Value (USD)* does not apply for the State of Connecticut it is related to the Purchase Order module.

Select payment and delivery terms from the *Payment Terms* and *Delivery Terms* dropdown menus. Please note: Additional delivery and payment terms cannot be added to the dropdown options. Select the field option: “*See Delivery Notes*” or “*See Payment Notes*” and enter the pertinent data that applies in the text box. Enter appropriate notes in the *Payment Notes* and *Delivery Notes* fields.

“*Other Notes*” field is for any additional information pertaining to the contract for INTERNAL purposes/viewing only.

[DEMO]



Contract Management



Contract Period

Issue Date *	Award Date *	Effective Date *	Expiration Date *
11/17/2020	Select Date	Select Date	Select Date

Potential Final Expiration Date
 Same as Expiration Date
Select Date

Set the *Contract Period* by entering *Issue Date*, *Award Date*, *Effective Date* and *Expiration Date*. You may use the calendar icons to navigate the calendar.

WebProcure defaults the *Potential Final Expiration Date* to be the *Same as Expiration Date*. If these are not the same dates, deselect and enter the appropriate date. This is a great feature to display multiple year contract terms.

[DEMO]



Contract Management



Custom Fields

Section Title: Contract Additional Information

Agrees to Supply Political SubDivisions
Yes

Core Catalog Item Contract
No

Emergency Contract
No

Add Field

Add New Section

Field: [] Field Type: Select Field Type

Add Field

Section Title: []
Add Field

Add New Section

Exit Next Step

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You may bypass *Custom Fields*.

If desired, add new fields and or new sections. The information shown on the slide is an example for your reference and what DAS Procurement Services uses for their contracts.

Click *Next Step* once finished adding fields/sections.

[DEMO]



Contract Management



Contract - Notification

Header Notifications Contract Clauses Catalog Items Attachments Authorization

Amendment Notification

Agency Email: Irolik@civicinitiatives.com

Email Recipients (Please separate email addresses with a semicolon):

Event Notifications

Number	Type	Trigger	Agency Email	Contractor Email
1.	Total Value	50	Irolik@civicinitiatives.com	julie.bernosky@ct.gov
2.	Effective Date	5	Irolik@civicinitiatives.com	julie.bernosky@ct.gov
3.	Expiration Date	30	Irolik@civicinitiatives.com	julie.bernosky@ct.gov
4.	Insurance and Certification Expiration	30	Irolik@civicinitiatives.com	julie.bernosky@ct.gov

In the Notifications section of the contract, enter email addresses for those who should receive an *Amendment Notification*. WebProcure defaults with your email address for *Agency Email*. If adding multiple email addresses in the *Email Recipients* text box, do not separate the email addresses with any spaces; only separate by a semicolon.

Event Notifications: Enter a *Trigger* for each *Type* of notification. The *Agency Email* and *Contractor Email* default to the email addresses per the *Header* section of the contract. (*Total Value* does not apply for the State of Connecticut.)

Add any additional notifications by clicking on *Add Notification from Library* button in the *Custom Notifications* field. This information is currently established and managed at the DAS Administrator level. Please contact DAS for more information.

Dispatch Email Content – You may override the standard email that WebProcure sends to the supplier by changing the toggle switch to *Yes*.

Once all entries have been entered Click *Next [DEMO]*



Contract Management



Contract Clauses

Header > Notifications > **Contract Clauses** > Catalog Items > Attachments > Authorization

Enter one or more clauses. Preset clauses (if any) applicable to this contract type have been automatically added.

Section Title: Contract

Contract Terms

Please see attached documents for contract terms.

Add Field

Add New Section

Exit Previous **Next**

Contract Clauses will be future functionality in terms of using Document Library clauses. Click *Next*.

[DEMO]



Other

FREE FORM TEXT - Add any additional insurance types and requirements

Add Field

Field:

Field Type: Select Field Type

Add Field

However, you may include other requirements and *Add Field* to add more clauses.

Select *Field Type*. You may also delete by clicking on the *trashcan* icon.

[DEMO]



Contract Management



You may also *Add New Section*. Or you may delete the section by clicking on the trashcan icon.

Select *Next* to move forward to the next section *Catalog Items*.

[DEMO]



Contract Management



Header > Notifications > Contract Clauses > **Catalog Items** > Documents > Authorization

Contract Item List

Add New Catalog

The supplier does not have any available catalogs for selection at this time.
Please click on 'Next Step' to continue or add a new catalog.

Exit Previous **Next**

This feature could be available to your organization if using item spec functionality (DAS is not using this functionality). Click *Next* to continue to the next section *Documents*.

[DEMO]



Contract Management



Contract Documents

Header Notifications Contract Clauses Catalog Items Attachments Authorization

→ Add Documents From Library Upload New Documents

Select	Type	Visibility	Document Name	Upload Date	Delete
--------	------	------------	---------------	-------------	--------

→ Exit Previous Next

Though there are two functions in this section, *Add Documents from Library* and *Upload New Documents*, the document library will be determined by your organization's administrator.

Select *Upload New Documents*.

[DEMO]



Contract Management



WebProcure: Upload Documents - Personal - Microsoft Edge
https://webprocure-stage.perfect.com/LoadContractDoc/state/ct?ac=display&contractId=559

Upload Document

To upload a new document click on the Browse button. The Choose a File window will appear. Make sure that you have "All Files" selected in the File Type drop down. Browse your computer to find the file you want to upload. Select the document and click the Open button. The Choose a File window will close. Repeat the process for up to 5 documents. Finally click the Upload button.

Browse ... CTsource Training Outline.docx

Upload Cancel

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Click *Browse...* button. Locate file you wish to upload. Click open. The file will populate in the *Upload Document* screen. Click *Upload*.

[DEMO]



Contract Management



Contract Documents

Header Notifications Contract Clauses Catalog Items Attachments Authorization

Add Documents From Library Upload New Documents

Select	Type	Visibility	Document Name	Upload Date	Delete
<input checked="" type="checkbox"/>		<input type="checkbox"/> Private <input type="checkbox"/> Visible to Contractor	CTsource Training Outline.docx	Dec 21, 2020	

Exit Previous Next

Back on the *Contract Documents* screen you will find the newly uploaded document. Check whether you would like to make this document is *Private* and/or *Visible to Contractor* or *Public*. Use the toggle switch to change the visibility to public. You also have the ability to *Delete* by clicking on the *trashcan* icon.

Click *Next* when ready to move forward to the *Authorization* section.

NOTE: When saving/naming documents, DO NOT USE special characters in the file name or the file will not display on the Public Contract Board.

[DEMO]



Contract Management



Contract Authorization

Header Notifications Contract Clauses Catalog Items Attachments Authorization

Use the check box to select all Organizations with access to the Contract. Selecting an Organization will automatically select all of its Sub-Organizations. Remove access to the Contract for any Organization, or Sub-Organization, by deselecting the check box.
Note: You can only authorize those organizations for which the supplier is active.

Total Contract Amount: 50,000.00
 Authorize the Head Organization (State of Connecticut) to administer the Contract regardless of the settings below

Piggyback Contract No

Cooperative Contract No

Authorized to use Contract	Organization	Authorized Amount (USD)	Release Limit (USD)	Release Minimum (USD)
<input type="checkbox"/>	State of Connecticut	0.00	0.00	0.00
<input checked="" type="checkbox"/>	A CTsource Training Entity	0.00	0.00	0.00

Previous Finished Select All De-Select All Exit

Environment STAGE

On the *Contract Authorization* screen, “*Total Contract Amount*” displayed here is being pulled from the *Pricing Information* section of the *Contract Header Information* page. The check box is not applicable for the State of Connecticut as it relates to the Purchase Order module.

Click the toggle switch to *Yes* if *Piggyback Contract* and/or *Cooperative Contract* is applicable; this is for information/reporting purposes only. Click the check box for the organization “*Authorized to Use Contract*”; this is also for informational purposes and will be displayed/searchable on the Contract Board or under *Contract Search (New)* functionality. Selecting the check box in this column will assist with reporting functionality. Click *Finished* and you move to the *Summary* screen.

[DEMO]



Contract Management



General Information	
Issue Date	November 17, 2020
Status	Unissued
Title	2020_Training 3_Sample Contract for Services
Access	Private
Description	
Contract Administrator	Lisa Rolik
Email Address	lrolik@divicoinitiatives.com
Organization	State of Connecticut
Request Number	
Solicitation Number	
Enable Contract as RoundTrip	No
P-Card Accepted	No
Contract Dispatch	Yes

The *Summary* provides the opportunity to review all the information you have entered. If the information is correct, you may select *Submit* to post to the Contract Board at the *Effective Date* entered on the header page. If your organization has established approval workflow, *Submit* will send the contract for review and approval.

If the information requires a revision you must use the *Edit* functionality within any section or the top ribbon of the page in any order. After completing your revision to a section you will select *Save* and must click the *Summary* page in the top ribbon to access that page to then select *Submit*.

[DEMO]



Contract Management



Contact Type	Contact Name	Email Address	Phone
Main Contact	Mary Smith	julie.bernosky@ct.gov	8607135142
Contract Contact	Mary Smith	julie.bernosky@ct.gov	8607135142

Insurance Category	Policy Number	Carrier	Effective Date	Expiration Date
General Liability	12345678-0012	American	November 17, 2020	November 22, 2021

PO Dispatch Distributors
Do Not Dispatch
Total Distributors: 1

Contract Diversity Information

Diversity	Allocation
(MBE) Minority Business Enterprise	25%

Supplier Diversity Information

Name	Diversity	Allocation
------	-----------	------------

Header Information continued.

[DEMO]



Contract Management



Pricing Information

Contract Type	Goods and Services Contract
Pricing Type	Fixed Price
Total Value Condition	Fixed
Total Value (USD)	50,000.00
Hide Contract Value	No
Retainage Amount (USD)	10,000.00
Retainage Notes	payable upon receipt of all received and approved deliverables
Initial Expended Value (USD)	0.00
Cumulative Expended Value (USD)	0.00
% Value To Go	100.00
Payment Terms	Net-45 Days
Payment Notes	
Delivery Terms	Free On Board Destination
Delivery Notes	
Other Notes	
Contract Period	
Award Date	November 18, 2020
Effective Date	November 18, 2020
Expiration Date	November 17, 2021
Potential Final Expiration Date	November 17, 2021
Custom Fields	

Contract Additional Information [3 Fields(s)]



Header Information continued.

At the end of the *Header Information* section, you may click on the *Edit* button should you wish to enter directly into the *Header Information* section from this point on the screen without having to return up to the contract navigation bar.

[DEMO]



Contract Management



Contract Notifications

Amendment Notification
* This contract has no Amendment Notification

Event Notifications

Type	Trigger	Agency Email	Contractor Email
Total Value	50	lrolik@civicinitiatives.com	julie.bernosky@ct.gov
Effective Date	5	lrolik@civicinitiatives.com	julie.bernosky@ct.gov
Expiration Date	30	lrolik@civicinitiatives.com	julie.bernosky@ct.gov
Insurance and Certification Expiration	30	lrolik@civicinitiatives.com	julie.bernosky@ct.gov

Custom Notifications

Name	Event Date	Agency Email	Contractor Email
Notice of Award	2020-11-17	lrolik@civicinitiatives.com	julie.bernosky@ct.gov

Dispatch email body

State of Connecticut has created Contract 2020FY10001-03 2020_Training 3_Sample Contract for Services for your review. To access this contract, click the link below and login to WebProcure powered by WebProcure.

[Edit](#)

Review Contract Notifications.

At the end of the *Contract Notifications* section, you may click on the *Edit* button should you wish to enter directly into the section from this point on the screen without having to return up to the contract navigation bar.

[DEMO]



Contract Management



Contract Clauses

- INSURANCE PROVISIONS [5 Field(s)]
- SUBCONTRACTORS [0 Field(s)]
- SIGNATURES [1 Field(s)]

[Edit](#)

Catalog Items

Contract has no Items

[Edit](#)

Document

Type	Document Name	Upload Date
	CTsource Training Outline.docx	Nov 17, 2020

[Edit](#)

Review *Contract Clauses*, *Catalog Items*, and *Document* sections.

At the end of these sections, you may click on the *Edit* button should you wish to enter directly into these sections from this point on the screen without having to return up to the contract navigation bar.

[DEMO]



Contract Management



Authorization	
Piggyback Contract	No
Cooperative Contract	No
Organization	
Children and Families	
Edit	

Performance assessment
*No data found

[View History](#) [Approval Preview](#) [Submit](#) [Close](#)

Review *Authorization*.

You may click on the *Edit* button should you wish to enter directly into the section from this point on the screen without having to return up to the contract navigation bar.

You have options to *View History*, *Approval Preview* (if your organization elects to use approval workflow), *Submit*, and *Close*.

Click *Submit* to post the contract to the Public Contract Board. The contract will post on the effective date entered in the *Header* of the contract.

Just as in Training 2: Solicitations and verifying the solicitation posts on the Public Bid Board, do the same for contracts.

[DEMO]



Contract Management



State of Connecticut

Solicitations

- New
- Formal Solicitations
- Create
- View Current
- Review / Award
- View Archived
- Informal Solicitations
- Create
- View Current
- Review / Award
- View Archived
- Solicitation Import
- Solicitation Search (New)

My Links

Add New Link

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If you choose to create a contract from a solicitation, from the *Solicitations* dropdown menu, select *View Archived* and search for the solicitation.

[DEMO]



Contract Management



Finalized Solicitations Retracted/Canceled Solicitations

Past Informal Solicitations that have been awarded.

Solicitation #	Title	Buyer	Start Date	End Date	Actions
112 - RFP Test	EAP	L Peccerillo-Hills	Nov 13, 2020 11:00 AM EST	Nov 13, 2020 1:00 PM EST	⋮
123TestAA	Solicitation from Contract - 123Test	G Gagne	Jun 02, 2020 2:15 PM EDT	Jun 02, 2020 2:30 PM EDT	⋮
123TestAB	Solicitation from Contract - 123Test	G Gagne	Jun 02, 2020 2:15 PM EDT	Jun 02, 2020 2:30 PM EDT	⋮
15	Solicitation from Contract - 00001MA	Y Osser	Jun 03, 2020 6:00 AM EDT	Jun 03, 2020 6:30 AM EDT	⋮
16	Solicitation from Contract - 00001MA	Y Osser	Jun 03, 2020 6:05 AM EDT	Jun 03, 2020 6:25 PM EDT	⋮
20PSX0124	Demonstration for DAS	G Gagne	Nov 12, 2020 8:00 PM EST	Nov 12, 2020 10:00 PM EST	⋮

Under *Finalized Solicitations*, click the solicitation # hyperlink.

[DEMO]



Contract Management



Edit Informal Solicitation View : 20PSX0124 - Demonstration for DAS (Informal)

Header Information	
Sub-organizations are not invited to participate in quote.	
Contact	Gerilynne Gagne 420 Columbus Blvd Hartford CT, 06102 United States Tel: 800-713-5112 gerilynne.gagne@ct.gov
Vendor Q&A Dates	Start Date: November 12, 2020 at 8:15:00 PM EST End Date: November 12, 2020 at 9:45:00 PM EST
Duration Dates	Start Date: November 12, 2020 at 8:00:00 PM EST End Date: November 12, 2020 at 10:00:00 PM EST
Title	Demonstration for DAS
Solicitation Type	Request for Proposal (RFP)
Who can see this bid?	Everyone
Who can respond to this bid?	All Vendors
Estimated Total Value	\$75,000.00
Description	Demonstration for DAS staff for RFP process
Justification	Req # 1354, date 11/1/20 and other justification
Justification Attachments	No
Restricted Access	No
Vendor may e-mail buyer directly	No
Solicitation Categories	Education and Training Services (86000000)
Delivery Terms	N/A: Not Applicable
Payment Terms	Vendor Specified
Custom Fields	
Electronic Signature (4 Fields)	
Created By	Gerilynne Gagne

[Publish](#) [Award Reversal](#) [Generate Contracts](#) [View Audit Detail](#) [Close](#) [Copy](#) [Print](#)

Environ

The *Edit Solicitation* page opens. Scroll down to the bottom of the page and select *Generate Contracts*.

[DEMO]



Contract Management



Will this contract be a Master Contract?

Note: These contracts cannot have catalog content and are used to establish a pool of vendors to receive and respond to statements of work (SOW).

Yes No

Award Contract to Vendor

Select	Supplier Name	Contract #
<input checked="" type="radio"/>	Grainger	
<input type="radio"/>	NAPA	

Would you like to generate catalog from Solicitation line items?

Note: You will be able to select line items from the solicitation to be attached as catalog items in contract.

Yes No



Answer the following questions: *Master Contract* should be *No* (at this time); *Award Contract to Vendor* select radio button for awarded supplier and click *Next*; lastly *Catalog Contract* should be *No* (at this time).

[DEMO]



Contract Management



Contract - Header Information

Header Notifications Contract Clauses Catalog Items Attachments Authorization

Please enter the information requested below. Then click the Next Step button to proceed.

General Information

Contract Type *	Contract Number *
--Select One--	
Contract Visibility*	Status
Private	Unissued
Title *	
Dairy Test	
Detailed Description	

The *Contract – Header Information* screen will open.

By generating a contract from a solicitation, WebProcure will transfer information from the solicitation. You may override the information if needed.

Continue to the same process steps as in creating a contract within the Contract Module.

[DEMO]



Contract Management



Current Contracts

Contractor:
 Organization: A CTsource Training Entity
 Contract Admin: ALL
 Status: ALL
 Content: ALL
 Commodity:
 Authorized Organization: ALL
 Contract Title:
 Contract Number: 122120

Contract #	Title	Contractor	Organization	Buyer	Effective Date	Expiration Date	Status	Actions
122120	Training 3 Demonstration	Training Supplier 1	A CTsource Training Entity	Geri-Lynne Gagne	December 21, 2020	December 20, 2021	Active	⋮

- Create Amendment
- Request for contract amendment
- 📄 Copy
- 🖨 Print
- 📧 Redispach
- ⌛ Cancel
- 🗺 Approval Map
- 🕒 Contract History
- 📄 Contract Release
- 📄 Generate Procurement Profile

CTsource Training 3

Contract Management

Master Agreements

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To amend a contract after it has been approved and active, go to *View Current* and use the search filter to bring up the contract details. Click the ellipsis under the *Actions* column and select *Create Amendment*.

NOTE: Making any changes to any exiting contract will result in an amendment to the contract and the application will automatically notify the supplier via email upon the effective date of the amendment.

In an effort to easily track amendments, DAS uses the *Custom Fields* section on the *Header* to identify specifics for the amendment. It is up to your organization as to how you want to manage this process. On the *Notifications* page you are able to modify the email that is sent to the supplier to report amendment details. The system also tracks via the contract history and audit functionality changes to the contract. More information related to amendments may be found in resource documents on the DAS website.

[DEMO]



Contract Management



The screenshot displays the Contract Management interface. At the top, there is a navigation bar with a home icon and dropdown menus for Solicitations, Contracts, Approval, Analytics, Vendors, and Admin. Below this is a secondary navigation bar with buttons for Edit Header, Edit Notification, Edit Clauses, Edit Items, Edit Documents, Edit Authorization, and Summary. A red arrow points to the Edit Header button. Below the navigation bars, the text reads "Contract Summary: 2020FY10001-01 - 2020_Training 3_Sample Contract for Services" with a Close button to its right. Underneath is a "Header Information" section. At the bottom right of the main content area, there are Return and Save buttons, with a red arrow pointing to the Return button. The text "Environment STAGE" is visible below these buttons. The footer contains "CTSource Training 3", "Contract Management" (highlighted in green), "Master Agreements", and the page number "38".

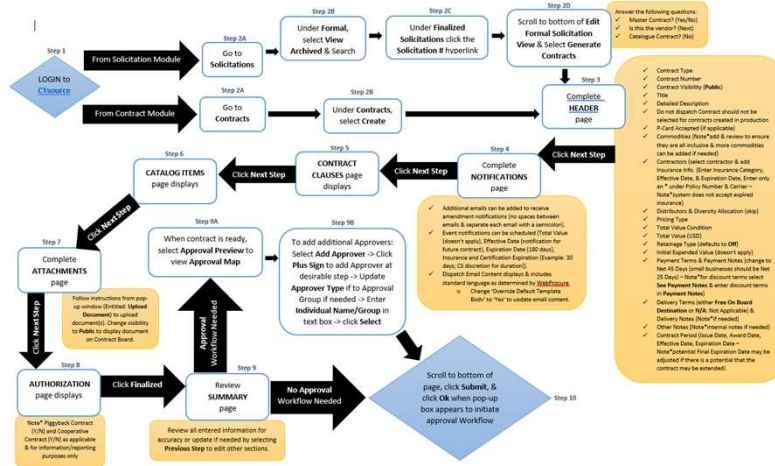
If you choose to *Edit* a contract, once you click on *Edit*, you will be taken directly into the *Summary* of the contract. Notice the contract navigation bar. You may edit from here, saving your changes.

At the bottom of each section you choose to edit, there will be a *Return* button and *Save* button. Save your work. Click *Return* to return to the *Summary* screen and click *Submit* to send the amendment to the supplier and the Contract Board.

[DEMO]



Contract Management



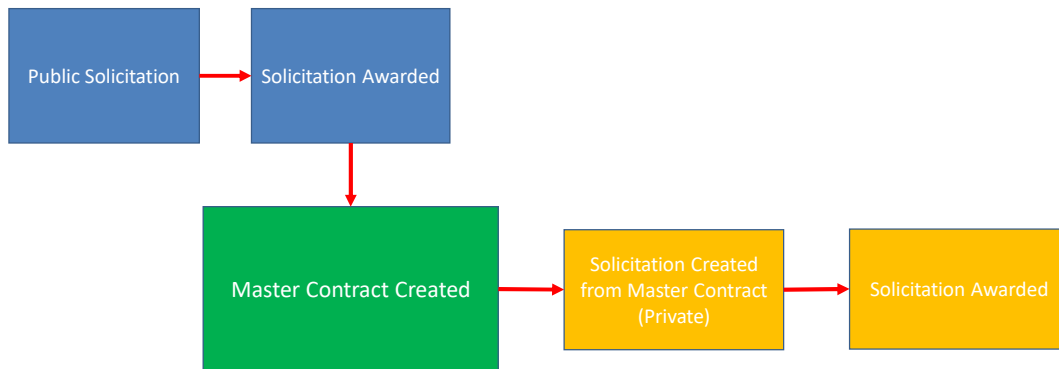
You may create a contract either from the Solicitation module or the Contract module.

Follow the steps as identified in the process flow.

[DEMO]



Master Agreements



DAS Procurement Services is the only org using the *Master Contract* feature in CTsource. As briefly discussed when creating a contract from a solicitation, one of the options was to select whether the contract would be a Master Contract.

Master Contracts essentially serve as a pool of qualified suppliers who are then allowed to bid on a subsequent Statement of Work (SOW) or Work Orders during a formal or informal solicitation process. This allows for expedited ordering of goods and services by working with pre-qualified, capable suppliers, ensuring the best and most competitive prices. DAS Procurement Services utilizes the Master Contract functionality for their multiple supplier awarded contracts accessible to all using State Agencies and Political Sub-Divisions.

This flow chart provides an overview of the process.



Master Agreements



Please note: Users must be granted Contract Management permissions to “Create Solicitation from Contract” in order to perform this functionality. Please see your CTsource Administrator to be granted permissions.

Starting at the *Home screen*, select *View Current* from the *Contracts* dropdown menu.

[DEMO]



Master Agreements



Navigation: Home Solicitations Contracts Approval Analytics Vendors Admin

Current Contracts

Contractor: Organization: State of Connecticut Contract Admin: ALL Status: ALL Content: Master Contracts

Commodity: Authorized Organization: ALL Contract Title: Contract Number:

Submit Reset

Contract #	Title	Contractor	Organization	Buyer	Effective Date	Expiration Date	Status	Actions
00001	Clause Library Review	ABC Co.	State of Connecticut	Geri-Lynne Gagne	June 29, 2020	June 28, 2021	Awaiting Approval	⋮
00001AB	Welding Equipment &	Blue Green Enterprises LLC	State of Connecticut	Geri-Lynne Gagne	November 01, 2017	October 31, 2020	Unissued	⋮

The *Current Contracts* screen opens. From the *Content* dropdown menu, select *Master Contracts* and click *Submit*. Use other filter options to assist with your search.

[DEMO]



Master Agreements



Current Contracts

Contractor: Organization: Contract Admin: Status: Content:

Commodity: Authorized Organization: Contract Title: Contract Number:

Contract #	Title	Contract	Organization	Buyer	Effective Date	Expiration Date	Status	Actions
000010A	Ice Cream Social	Master Contract	State of Connecticut	GenLyne Gagne	May 29 2020	May 28 2021	Active	<input type="button" value="Do not dispatch"/>
000010A	Ice Cream Social	Master Contract	State of Connecticut	GenLyne Gagne	May 29 2020	May 28 2021	Amendment Pending	<input type="button" value="Do not dispatch"/>
1237561	Multi-Supplier Award in master contract	Master Contract	State of Connecticut	GenLyne Gagne	May 14 2020	May 13 2021	Active	<input type="button" value="Do not dispatch"/>
1237561	Multi-Supplier Award in master contract	Master Contract	State of Connecticut	GenLyne Gagne	May 14 2020	May 13 2021	Amendment Pending	<input type="button" value="Do not dispatch"/>
1238610040	Multi-Supplier Award in master contract	Master Contract	State of Connecticut	GenLyne Gagne	May 14 2020	May 13 2021	Active	<input type="button" value="Do not dispatch"/>
1237561	Multi-Supplier Award in master contract	Master Contract	State of Connecticut	GenLyne Gagne	May 20 2020	May 19 2021	Active	<input type="button" value="Do not dispatch"/>
129510010A	Purchase of Carpet and Flooring Piling Products and Services	Master Contract	State of Connecticut	Ying Chen	January 01 2019	December 31 2020	Cancelled	<input type="button" value="Do not dispatch"/>
19950102	Joint and Crust Sealing of Blown-up Concrete Retainers	Master Contract	State of Connecticut	Don Durr	November 02 2017	October 01 2020	Amendment Pending	<input type="button" value="Do not dispatch"/>
1995010A	Cloud Solutions	Master Contract	State of Connecticut	Ying Chen	October 11 2018	September 18 2020	Active	<input type="button" value="Do not dispatch"/>
1995010A	Cloud Solutions	Master Contract	State of Connecticut	Ying Chen	October 11 2018	September 18 2020	Amendment Pending	<input type="button" value="Do not dispatch"/>

Current Contracts

Contractor: Organization: Contract Admin: Status: Content:

Commodity: Authorized Organization: Contract Title: Contract Number:

Contract #	Title	Contract	Organization	Buyer	Effective Date	Expiration Date	Status	Actions
					2018	19 2020	Amendment Pending	<input type="button" value="Do not dispatch"/>

Displaying 1-10 / 29

Only State of Connecticut Master Contracts should be populating the screen now. Search for the master contract with which you wish to create a solicitation.

As stated previously, only users with the assigned *Create Solicitation* from Contract permissions will be able to create a solicitation from a Master Contract. The Master Contract must be in **Active** status and the solicitation **must** contain line items.

You may do this by reviewing the list or by utilizing the search fields. Use the arrows at the bottom of the screen to move forward and to move back in the *Current Contracts* listing.

[DEMO]



Master Agreements



Current Contracts

Contractor: Organization: ALL Contract Admin: ALL Status: ALL Content: ALL
Commodity: Authorized Organization: ALL Contract Title: Provisions Contract Number:

Contract #	Title	Contractor	Organization	Buyer	Effective Date	Expiration Date	Status	Actions
00PSX2222	Provisions	Best Supplier	State of Connecticut	Phil St. Amand	June 17, 2020	June 17, 2021	Active	

Displaying: 1-1 / 1

For this search, “Provisions” (the contract title) was entered in the *Contract Title* field. Notice that only that contract is now displaying. (If a new search is needed, click *Reset* to begin a new search.)

Click on the contract number in the *Contract #* column. This will open the contract summary.



Master Agreements



Contract Summary: Y02TEST99ITZ0017MB - Master Agreement A-99-017 Take 2 Close

Header Information

General Information Key Contract Key Contract

Issue Date	December 15, 2004
Status	Active
Title	Master Agreement A-99-017 Take 2
Access	Public
Description	N. Harris Computer Corporation (Syscon Justice Systems); Master Agreement Number A-99-017; Information Processing Systems Agreement DOC Integrated Inmate Accounts Trust & Commissary POS
Contract Administrator	Ying Oster
Email Address	ying.oster@proacts.com
Organization	State of Connecticut
Request Number	
Solicitation Number	
Enable Contract as RoundTrip	No
P-Card Accepted	No
Contract Dispatch	No

Commodity

- Information Technology Broadcasting and Telecommunications (43000000)

Contractor

- Awesome Supplier
- Candid Supplier
- Best Supplier
- Excellent Supplier
- Dashing Supplier
- Fantastico Supplier

The *Contract Summary* page will open.

Scroll through the contract summary to review the *Header Information*.



Master Agreements



Pricing Information	
Contract Type	Migrated DAS Contract
Pricing Type	No Limit
Hide Contract Value	No
Retainage Amount (USD)	0.00
Retainage Notes	
Initial Expended Value (USD)	0.00
Cumulative Expended Value (USD)	0.00
Payment Terms	Net 45 Days
Payment Notes	
Delivery Terms	Free On Board Destination
Delivery Notes	
Other Notes	Legacy Commodity Code#5020
Contract Period	
Award Date	February 06, 2008
Effective Date	February 06, 2008
Expiration Date	December 31, 2030
Potential Final Expiration Date	December 31, 2030
Custom Fields	
Contract Additional Information [2 Fields(s)]	

Review of *Header Information* continued...



Master Agreements



Contract - Notification

Amendment Notification

Agency Email

geri-lynn.gagne@ct.gov

Email Recipients (Please separate email addresses with a semicolon)

Event Notifications

Number	Type	Trigger	Agency Email	Contractor Email
1.	Total Value	% To Go	geri-lynn.gagne@ct.gov	yiping'osser@proactis.com.yip
2.	Effective Date	Days To Go	geri-lynn.gagne@ct.gov	yiping'osser@proactis.com.yip
3.	Expiration Date	Days To Go	geri-lynn.gagne@ct.gov	yiping'osser@proactis.com.yip
4.	Insurance and Certification Expiration	Days To Go	geri-lynn.gagne@ct.gov	yiping'osser@proactis.com.yip

Custom Notifications

Name	Agency Email	Contractor Email
* No custom notifications have been added to this contract		

Environment STAGE 121.1.4

Review the *Contract Notifications* and *Contract Clauses* sections.



Master Agreements



Catalog Items
Contract has no Items

Document
Contract has no Documents

Authorization

Piggyback Contract	No
Cooperative Contract	No

Contract has no Authorized Orgs

Performance assessment
*No data found

[Create Solicitation](#) [Copy](#) [Close](#)

Review the *Catalog Items*, *Document*, *Authorization*, and *Performance Assessment* sections.

Click *Create Solicitation*.



Master Agreements



Please select the type of Solicitation document that you would like to create:

Formal Solicitation

Informal Solicitation

When you select *Create Solicitation*, a window appears prompting you to choose the type of solicitation: *Formal Solicitation* or *Informal Solicitation*.

Select *Formal Solicitation* to receive sealed bids or *Informal Solicitation*. Click *Create*.

[DEMO]



Master Agreements



When you select *Create*, WebProcure takes you to the *Solicitation Creation* pages. You will be able to tell you are creating a *Private Solicitation* as this is identified.

Follow the instructions for creating a formal/informal solicitation from here. At least one line item is required to be entered on the *Item Specs* page to save this type of solicitation.

Please note: Only those suppliers from the contract will be allowed on the solicitation. Additional suppliers may not be added to the solicitation, however, you do not have to send the solicitation to all the suppliers in the pool and select only those suppliers you would like to include. Only items that are in the contract commodity category or categories may be added.

[DEMO]



Master Agreements



Main Item Fields Additional Item Fields

Item Specification

Item Specification Name *

Item Specification Number

Manufacturer Name

Manufacturer Part Number

Description

Commodity Category and Sub-Category
(Both must be specified; click on "select" to select the categories)

Select

Solicitation Response Options

Specify Quantity

Unit of Measure
each (EA)

Pricing Type
\$ Amount

Specify Requested Brand

Add Alternatives

Remove Alternatives

Pricing Factor
N/A

Substitution and Alternatives

Allow supplier to specify substitute alternatives

Allow supplier to provide proposals for multiple alternatives

CTSource Training 3

Contract Management

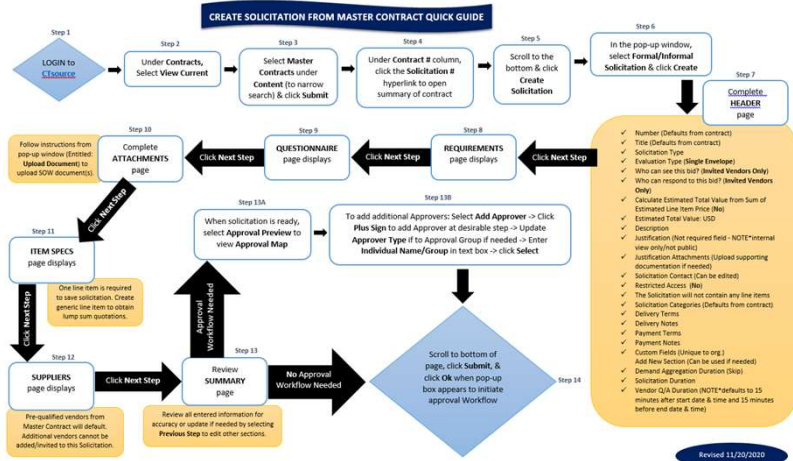
Master Agreements

This slide shows an example of a line item entry required for an informal solicitation associated with a master contract. It is up to the organization as to how to set up the line item, however, it is our suggestion to complete as follows:

- Item Specification Name – Brief description of the informal solicitation
- Item Specification Number – leave blank
- Manufacturer Name – leave blank
- Manufacturer Part Number – leave blank
- Description – Enter a more detailed description (e.g. Provide lump sum for Statement of Work attached)
- Commodity Category – must be same as master contract commodities
- Specify Quantity – 1
- Unit of Measure – Lump Sum
- Remaining fields – leave blank
- Click Save



Master Agreements



Revised 11/20/2020

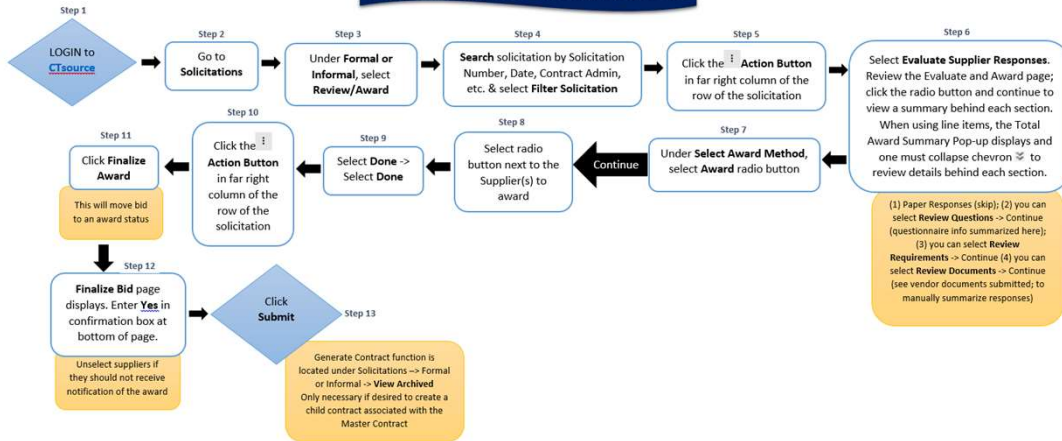
Follow these process steps to create a solicitation from a Master Contract.



Master Agreements



SOLICITATION EVALUATION & AWARD QUICK GUIDE



Follow these process steps to evaluate and award a solicitation from a Master Contract.



Questions & Answers



- Please use the Q&A function at the bottom of the screen to ask questions during the training webinar.
- We will answer as many questions as we can.
- All questions and answers will be posted on our website for future reference, so please be sure to go to <https://portal.ct.gov/DAS/CTSource/CTSource>



CTsource Training 3



This concludes Training 3.

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

For any questions after the webinar or to request a username and password to the Stage Environment contact DAS Procurement Services by emailing: das.ctsource@ct.gov

Thank you!