



State of Connecticut  
DAS – Procurement Services

# CTsource Training 1

## Log In, Navigation & User Set Up

January 4, 2021



# CTsource Training



Welcome to CTsource Training! Training 1 is the first of three trainings provided by DAS Procurement Services which are as follows:

***Training 1: Log In, Navigation & User Set Up***

***Training 2: Solicitations***

***Training 3: Contracts/Master Agreements***

Training 2 (January 20, 2021) & Training 3 (January 27, 2021) will be **LIVE** training events in **webinar** format with a **LIVE** Questions & Answers segment at the end of each training. Both trainings will be recorded for those who cannot attend the training events to view at a later date. Links to the recordings will be posted @

<https://portal.ct.gov/DAS/CTSource/CTSource>

***LET'S BEGIN!***



# CTsource Training 1



Section	Page
<a href="#">Log in</a>	4
<a href="#">Navigation</a> (Dashboards, Notifications, Bid & Contract Boards)	7
<a href="#">User Set Up</a>	34



# Log In



Log in to CTsource (***Stage*** or ***Production*** environment)

<https://webprocure-stage.perfect.com/login.do> OR <https://webprocure.perfect.com/Login>

- Enter *Username* and *Password*
- Arrive at home page

You may contact DAS Procurement Services to request a username and password to the ***Stage Environment*** by emailing your request to: [das.ctsource@ct.gov](mailto:das.ctsource@ct.gov)

Usernames and passwords to the Production environment will be emailed to you after the Training #3 event (January 27<sup>th</sup>) to those who have requested access.




# Log In




**proactis**

## WebProcure

Username / Email Address

 Username or Email

Password

 Password

[Log In](#) [Trouble Logging In?](#)



# Log In



What's New

### 12.6 Release - Product Enhancements - General Availability

- **Admin**
  - Creation of new **Privileges** for **Admin** sections and subsections
  - Management of **Document Libraries**
- **Order / Invoice**
  - Add **Order Line Numbers** to **Receipt** and **Invoice** entry pages
- **Request**
  - **Financial System Pending Status** Added to **Track Requests** page

[For complete release notes click here.](#)

Show on login

« Previous Feature   Next Feature »   **Got It!**



# Navigation



The screenshot displays the CT SOURCE web application interface. At the top left is the CT SOURCE logo. To its right, the text "State of Connecticut" is visible with a dropdown arrow and a notification bell icon. Below this is a dark blue navigation bar containing a home icon and several menu items: "Solicitations", "Contracts", "Approval", "Analytics", "Vendors", and "Admin", each with a dropdown arrow. On the right side of this bar, a "My Account" dropdown menu is open, highlighted with a red box. This menu contains three items: "User Profile", "Help", and "Logout". Below the navigation bar, the main content area is divided into two columns. The left column has a blue header "News and Information!" and contains a welcome message "Welcome to WebProcure!!" followed by two links for "State of CT Bid Board Stage Link" and "State of CT Contract Board Stage Link". The right column has a blue header "My Links" and an orange button labeled "Add New Link".



# Navigation



State of Connecticut

Solicitations Contracts Approval Analytics Vendors Admin

Personal Information Security Settings Organization Preferences Payment Options User Notifications

### Edit your information

#### User Information

Salutation  
Select

First Name  
Lisa

Middle Initial  
(optional)

Last Name  
Rolik

Address  
450 Columbus Blvd  
(optional)  
(optional)

City  
Hartford

State  
Connecticut

ZIP  
06103





# Navigation



The screenshot shows the CT SOURCE user interface. At the top, there is a navigation bar with the following items: Home, Solicitations, Contracts, Approval, Analytics, Vendors, and Admin. Below this is a secondary navigation bar with tabs for Personal Information, Security Settings (highlighted with a red circle), Organization Preferences, Payment Options, and User Notifications. The main content area is titled "Change Your Password and Challenge Question". It includes a note: "Please Note : Passwords must be at least 8 characters in length, must be a mix of upper-case letters, lower-case letters, numbers, and special characters, and must not be the same as any password used within the past five (5) generations." Below this is a "Change Password" section with fields for User Id (Irolkct), Old Password, New Password, and Verify New Password. A yellow note states: "If you would like to keep your Challenge Question the same, please leave the fields below as they are." The "Enter your Challenge Question" section includes a note: "Please enter a challenge question. If you forget your password, we will ask you to retype your answer to verify you are a registered user and email you a new password." and a "Question" field.



# Navigation



State of Connecticut

Home Solicitations Contracts Approval Analytics Vendors Admin

Personal Information Security Settings **Organization Preferences** Payment Options User Notifications

### Delegate

Disable Save Reset

**Contract Delegatee**  
 Q + x

**Solicitation Delegatee**  
 Q + x

**Start Date**  Calendar **End Date**  Calendar



# Navigation



The screenshot displays the CT SOURCE web application interface. At the top left is the CT SOURCE logo. Below it is a navigation menu with the following items: Home, Solicitations, Contracts, Approval, Analytics, Vendors, and Admin. The main content area is titled "News and Information!" and contains a welcome message and two links to bid and contract board search pages. On the right side, a notifications panel is highlighted with a red border. The panel is titled "State of Connecticut" and "Notifications (26)". It lists three notifications: "Solicitation # 364 Titled 'requirements format' will end soon.", "Solicitation(364) was approved", and "Contract(20PSX1010) was rejected". Each notification includes a date and a "See more" link. At the bottom of the panel are "See All", "Down Arrow", and "Refresh" icons.



# Navigation



The screenshot shows the CT SOURCE web application interface. At the top left is the CT SOURCE logo. To its right is a dropdown menu for 'State of Connecticut'. Below these is a dark blue navigation bar with a home icon and several menu items: 'Solicitations', 'Contracts', 'Approval', 'Analytics', 'Vendors', and 'Admin'. A red box highlights a user menu in the top right corner, which contains three items: 'My Account', 'Help', and 'Logout'. Below the navigation bar, the page is divided into two main sections. The left section is titled 'News and Information!' and contains a welcome message and two links to the State of CT Bid Board and Contract Board search pages. The right section is titled 'My Links' and contains an 'Add New Link' button.



# Navigation



**How can we help?**

For additional assistance, contact Customer Support at 866-889-8533 or email [webprocure-support@proactis.com](mailto:webprocure-support@proactis.com)

Search

[Index](#) [Glossary](#) [Favorites](#)

Welcome	Admin	Analytics	Approval	Catalogs
Contracts	Home	Invoice	Order	Requests
Solicitations	Vendors	Release Notes	Tutorials	FAQs

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# Navigation



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Search

Index Glossary Favorites

Welcome Admin Analytics Approval Catalogs

Contracts Home Invoice Order Requests

Solicitations Vendors Release Notes **Tutorials** FAQs

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WebProcure\_v4 Support Proactis

Tutorials

### Tutorials

Below is a list of available topics with associated video demonstrations.

Depending on your system and network speed, some of the longer videos may take a minute or two to completely load.

- Contract Related Tutorials
  - Completing the Contract Header**
    - [Entering and Selecting Contract Clauses](#)
  - Catalog Items
  - [Managing Contract Notifications](#)
  - [Working with Attachments](#)
  - [Authorizing Access](#)
  - [Reviewing the Contract Summary](#)
- Solicitation Related Tutorials
  - [Completing the Header Information Section](#)
  - [Creating a Questionnaire](#)
  - [Adding and Including Requirements](#)
  - [Attaching Documents to a Solicitation](#)
  - [Adding Items to a Solicitation](#)
  - [Performing Supplier Selection](#)

Search

Index Glossary

Welcome Admin Analytics Approval Catalogs Contracts Home Invoice Order Requests Solicitations Vendors Release Notes **Tutorials** FAQs

**WebProcure Contracts**  
Completing the Contract Header



# Navigation



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Solicitations	Vendors	Release Notes	Tutorials	FAQs

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Release Notes

Release Notes

Contents

[2020](#)  
[2019](#)  
[2018](#)

Release Notes highlight the enhancements and defect resolutions made to the WebProcure application suite. If enhancements were included in the release, they will be listed as bullet points below each link. Click a link below to view related PDF version of Release Notes in a new browser window.

**2020**

- WebProcure 12.6 - November 2020
  - Product Enhancements - General Availability
    - Admin
      - [Creation of New Privileges for Admin Sections and Subsections](#)
      - [Management of Document Libraries](#)
    - Order / Invoice
      - Add Order Line Numbers to [Receipt](#) and [Invoice Entry](#) Pages
    - Request
      - Financial System Pending Status Added to [Track Requests](#) Page
  - Product Enhancements - Limited Availability
    - Invoice
      - Account Code Description Added to Multiple Pages including:
        - Payment Voucher - View, Create and Edit pages
        - Track Requests
        - Track Orders
        - Purchase Order History
        - Approval Inbox
        - Invoice Summary
        - Invoice Items
        - Request Modal in Document Cross Reference View
        - PO Modal in Document Cross Reference View



# Navigation



The screenshot shows the top navigation bar of the CT SOURCE application. The navigation menu includes: Home (circled in red), Solicitations, Contracts, Approval, Analytics, Vendors, and Admin. Below the navigation bar, there are two main content areas: "News and Information!" and "My Links".

**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](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](https://webprocure-stage.perfect.com/wp-web-public/en/#/contractboard/search?searchterm=*&customerid=51)

**My Links**

[Add New Link](#)





# Navigation



The screenshot displays the CT SOURCE web application interface. At the top right, it shows 'State of Connecticut' with a dropdown arrow, a grid icon, and a notification bell. Below this is a dark blue navigation bar with a home icon and menu items: 'Solicitations', 'Contracts', 'Approval', 'Analytics', 'Vendors', and 'Admin'. The main content area is divided into two columns. The left column, titled 'News and Information!', contains a welcome message and two links for 'State of CT Bid Board Stage Link' and 'State of CT Contract Board Stage Link'. The right column, titled 'My Links', features a search input field with a close button (x) and a checkmark button (✓), and an 'Add New Link' button below it. A red oval highlights the 'My Links' section.



# Navigation



[CT.gov Home](#) / [Department of Administrative Services](#) / [For Agencies and Municipalities](#) / [DAS Procurement Services](#) / [New Initiatives](#) / [CTsource](#)



[Log in to CTsource](#)

## Registration

- [CTsource Registration](#) >
- [Registration Resources](#) >
- [Login to CTsource](#) >
- [Supplier Registration and Portal User Guide](#)

## Bid Board

- [CTsource Bid Board](#) >
- [Bid Board Resources](#) >
- [Bid Board User Guide](#)
- [Supplier Solicitation Response and Addenda Guide](#)

## Contract Board

- [CTsource Contract Board](#) >
- [Contract Board Resources](#) >
- [Contract Board User Guide](#)



# Navigation



State of Connecticut ▾

Home 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](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](https://webprocure-stage.perfect.com/wp-web-public/en/#/contractboard/search?searchterm=*&customerid=51)

### My Links

Add New Link



# Navigation



**Bid Board**  English

236 Matching Solicitations Found Page 1 Sort Results By Relevance

**Status**

- Closed (151)
- Awarded (53)
- Under Evaluation (15)
- Canceled / Retracted (11)
- Open (6)

**Bid Types**

- Invitation to Bid (134)
- Request for Proposal (22)
- Request for Quotation (20)
- Construction - Invitation to Bid (19)
- Request for Information (9)
- Construction - Request for Qualifications (4)
- Testing Script to be deleted (4)
- Construction - Notice of Intent to Bid (2)
- DAS-CS Request for Qualifications (2)
- Construction - Request for Information (1)
- DCS - Notice of Intent to Bid (1)
- DCS - Request for Qualifications (1)

**Commodities (50)**

Over 50 Commodities found. Please refine your search to filter by Commodity.

**Organization (3)**

- State of Connecticut (201)
- DAS Construction Services (33)
- Children and Families (2)

- 78 | GM IT Test Bid**  
IT Statewide Bid for New Fiscal Year Annual Purchasing  
Start Date: Apr 21, 2020  
End Date: Apr 22, 2020  
State of Connecticut
- 29 | Procurement Test**  
Procurement Test  
Start Date: Feb 6, 2020  
End Date: Feb 13, 2020  
State of Connecticut
- YPO13850-102 | YPO13850-102 DCS Build**  
Start Date: May 8, 2020  
End Date: May 11, 2020  
DAS Construction Services
- 9 | Informal RFQ-DR 12.3**  
Testing Description  
Start Date: May 18, 2020  
End Date: May 18, 2020  
State of Connecticut
- 20PSX2020 | Janitorial Services\***  
Janitorial services  
Start Date: May 21, 2020  
End Date: May 26, 2020  
State of Connecticut
- 20PSX900A | Pheasants**  
Contract shall deliver on September 1, 2020, 23,000 native Pennsylvanian pheasants for seasonal stocking for licensed pheasant hunters.  
Start Date: May 22, 2020



# Navigation



2 Matching Solicitations Found

Clear filter

Page 1

**Status**

- Awarded (1)
- Open (1)

**Bid Types**

- Invitation to Bid (2)

**Commodities (8)**

- Aggregates (2)
- Asphalt based concrete (2)
- Bituminous derivatives (2)
- Building and Facility Construction and Maintenance Services (2)
- Concrete and cement and plaster (2)
- Concrete and mortars (2)
- Roads and landscape (2)
- Structures and Building and Construction and Manufacturing Components and Supplies (2)

**Organization (1)**

- State of Connecticut (2)

**20PSX0092 | Joint and Crack Seal of Bituminous Concrete Pavement TEST\***

The State of Connecticut Department of Administrative Services ("DAS") is issuing this Invitation to Bid to solicit bids for JOINT AND CRACK SEAL OF BITUMINOUS C State Agencies and Political Subdivisions for furnishing and applying hot-applied rubberized asphalt crack sealer to bituminous concrete pavement surface cracks, ra

**Start Date:** Aug 27, 2020  
**End Date:** Sep 1, 2020  
State of Connecticut

**589 | CJC Joint and Crack Seal of Bituminous Concrete Pavement TEST\***

The State of Connecticut Department of Administrative Services ("DAS") is issuing this Invitation to Bid to solicit bids for JOINT AND CRACK SEAL OF BITUMINOUS C State Agencies and Political Subdivisions for furnishing and applying hot-applied rubberized asphalt crack sealer to bituminous concrete pavement surface cracks, ra

**Start Date:** Sep 15, 2020  
**End Date:** Jan 2, 2021  
State of Connecticut



# Navigation



**Bid Board**

[←Go Back](#)

[Solicitation # 20PSX0092 \\*](#)

When reviewing bid summaries on this solicitation board : ✓Green Check Mark Means "yes" ✗Red X Means "no"

**Joint and Crack Seal of Bituminous Concrete Pavement TEST**

The State of Connecticut Department of Administrative Services ("DAS") is issuing this Invitation to Bid to solicit bids for JOINT AND CRACK SEAL OF BITUMINOUS CONCRETE PAVEMENT for the Department of Transportation, All Using State Agencies and Political Subdivisions for furnishing and applying hot-applied rubberized asphalt crack sealer to bituminous concrete pavement surface cracks, raveled longitudinal joints and raveled transverse joints.

<b>Start Date :</b>	August 27, 2020 06:00:00 AM EDT
<b>End Date :</b>	September 01, 2020 01:00:00 PM EDT
<b>Solicitation :</b>	20PSX0092
<b>Status :</b>	<b>Awarded / ADDENDUM</b>
<b>Delivery Terms :</b>	Free On Board Destination
<b>Payment Terms :</b>	Vendor Specified
<b>Who can respond to this bid ? :</b>	<b>All Vendors</b>

**Contact Information**

**Solicitation Number :20PSX0092 from State of Connecticut**

Phil St. Amand  
450 Columbus Blvd Hartford CT, 06103 United States  
Tel: 860-713-5799  
philip.st.amand@ct.gov

Dan Dion  
450 Columbus Blvd Hartford CT, 06103 United States  
Tel: 860-713-5168  
daniel.dion@ct.gov

**Solicitation Categories**

Commodity Code ~	Name
30000000	Structures and Building and Construction and Manufacturing Components and Supplies
30110000	Concrete and cement and plaster
30111500	Concrete and mortars
30111509	Asphalt based concrete
30111800	Aggregates



# Navigation



**Bid Board** Search...

**Start Date :** August 27, 2020 06:00:00 AM EDT  
**End Date :** September 01, 2020 01:00:00 PM EDT  
**Solicitation :** 20PSX0092  
**Status :** **Awarded / ADDENDUM**  
**Delivery Terms :** Free On Board Destination  
**Payment Terms :** Vendor Specified  
**Who can respond to this bid ? :** **All Vendors**

**Contact Information**

**Solicitation Number :** 20PSX0092 from State of Connecticut

Phil St. Amand  
 450 Columbus Blvd Hartford CT, 06103 United States  
 Tel: 860-713-5799  
 philip.st.amand@ct.gov

Dan Dion  
 450 Columbus Blvd Hartford CT, 06103 United States  
 Tel: 860-713-5168  
 daniel.dion@ct.gov

**Solicitation Attachments**

**Mandatory Documents**

- Maintenance Districts Map Rev 7.13 exhibit E.pdf
- Work Zone Traffic Control.docx

**Addendum Documents**

**Solicitation Addenda**

- VendorChangeDetailsReport\_20PSX0092\_v2\_Aug\_28\_20.pdf

**Solicitation Items**

GROUP : Joint and Crack Sealing- District 1

No. ^	Spec. Number :	Name :		
▶ 1		500-2500lbs		
▶ 2		2501-5000lbs		
▶ 3		5001lbs and greater	1	pound

30111809 Asphalt based concrete  
 30111800 Aggregates



# Navigation



**Bid Board** Search...

←Go Back

[Solicitation # 20PSX0092 \\*](#)

When reviewing bid summaries on this solicitation board : ✓Green Check Mark Means 'yes' ✗Red X Means 'no'

**Joint and Crack Seal of Bituminous Concrete Pavement TEST**

The State of Connecticut Department of Administrative Services ("DAS") is issuing this Invitation to Bid to solicit bids for JOINT AND CRACK SEAL OF BITUMINOUS CONCRETE PAVEMENT for the Department of Transportation, All Using State Agencies and Political Subdivisions for furnishing and applying hot-applied rubberized asphalt crack sealer to bituminous concrete pavement surface cracks, raveled longitudinal joints and raveled transverse joints.

<b>Start Date :</b>	August 27, 2020 06:00:00 AM EDT
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<b>Solicitation :</b>	20PSX0092
<b>Status :</b>	<b>Awarded / ADDENDUM</b>
<b>Delivery Terms :</b>	Free On Board Destination
<b>Payment Terms :</b>	Vendor Specified

**Contact Information**

**Solicitation Number :20PSX0092 from State of Connecticut**

Phil St. Amand  
450 Columbus Blvd Hartford CT, 06103 United States  
Tel: 860-713-5799  
philip.st.amand@ct.gov

Dan Dion  
450 Columbus Blvd Hartford CT, 06103 United States  
Tel: 860-713-5168  
daniel.dion@ct.gov

**Solicitation Categories**

Commodity Code ^	Name :
30000000	Structures and Building and Construction and Manufacturing Components and Supplies
30110000	Concrete and cement and plaster
30111500	Concrete and mortars

30111800 Aggregates





# Navigation



State of Connecticut ▾

Home 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](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](https://webprocure-stage.perfect.com/wp-web-public/en/#/contractboard/search?searchterm=*&customerid=51)

### My Links

Add New Link



# Navigation



Contract Board

Search...

64 Matching Contracts Found

Page 1

Sort Results By  
Relevance

Clear filter

**Status**

- Active (64)

**Type**

- Goods and Services Contract (33)
- Migrated Goods and Services Contract (10)
- Information Technology Contract (5)
- DAS Contract (3)
- Migrated DAS Contract (3)
- State Contract (3)
- Construction - On-Call Consultant Contract (2)
- Construction - Consultant On-Call Contract (1)
- Construction - Migrated On-Call Consultant Contract (1)

20DAS8001AA | On-Call Construction Administration Consultant (CAm) – Minor Capital Projects

NOTE: A Firm can only hold ONE CA On-Call contract at one time, either one CA or one CAm, in order to provide more opportunity to the consultant services community. On-Call Construction Administration Consultants for minor capital projects provide limited or part time construction oversight on behalf of State of Connecticut Department of Administrative Services/Construction Services (DAS/CS) staff, including compliance with contract documents and schedule. These project assignments are anticipated to provide for a range of 8 to 20 hours per week of project oversight for the duration of the construction activity. Preferably, the selected consultant's primary business is construction administration (and not performing construction work), and they bring experience with institutional building projects. These services will be for construction contracts based on DBB procurement.

Jun 12, 2020 - Jun 12, 2022

Outlier Construction

00PSX5555 | Testing

Jun 16, 2020 - Jun 16, 2021

Beet Supplier

00PSX2222 | Provisions

Jun 17, 2020 - Jun 17, 2021

Beet Supplier



# Navigation



Contract Board Search... English

[Contract # 20DAS8001AA](#)

**On-Call Construction Administration Consultant (CAm) – Minor Capital Projects**

NOTE: A Firm can only hold ONE, CA On-Call contract at one time, either one CA or one CAm, in order to provide more opportunity to the consultant services community. On-Call Construction Administration Consultants for minor capital projects provide limited or part time construction oversight on behalf of State of Connecticut Department of Administrative Services/Construction Services (DAS/CS) staff, including compliance with contract documents and schedule. These project assignments are anticipated to provide for a range of 8 to 20 hours per week of project oversight for the duration of the construction activity. Preferably, the selected consultant's primary business is construction administration (and not performing construction work), and they bring experience with institutional building projects. These services will be for construction contracts based on DBB procurement.

**Contract Administration**

Administrator: Rebecca Cutler  
 Administrator Email: noemail@ct.gov  
 Organization: DAS Construction Services

**Vendor**

Cutler Construction  
 Contact Name: Rebecca Cutler  
 Contact Email: bexnjim13@gmail.com  
 Contact Telephone: 8607135762

**Contract Pricing**

Contract Type: Construction - On-Call Consultant Contract  
 Pricing Type: Fixed Price  
 Value: \$500,000.00

**Contract Period**

Issue Date: Jun 8, 2020  
 Award Date: Jun 11, 2020  
 Effective Date: Jun 12, 2020  
 Expiration Date: Jun 12, 2022

**Distributors**

Distributor Name ^
Cutler Construction

1 total

**Contacts**

Contact Type ^	Name ^	Email ^	Phone ^
Main Contact	Rebecca Cutler	bexnjim13@gmail.com	8607135762

1 total

**Custom Fields**

Not Available

**Commodity Information**

Code ^	Description ^
77000000	Environmental Services

**Attachments**

Attachment Name ^
Pro - Contract Management - How To.pptx



# Navigation



The screenshot shows the top navigation bar of the CT SOURCE web application. The navigation bar is dark blue and contains the following items from left to right: a home icon, "Solicitations", "Contracts", "Approval", "Analytics", "Vendors", and "Admin". Each item has a small downward arrow indicating a dropdown menu. A red oval highlights the entire navigation bar, and a red arrow points to the home icon. Below the navigation bar, there are two main content areas. The left area is titled "News and Information!" and contains a welcome message and two links to the State of CT Bid Board and Contract Board. The right area is titled "My Links" and contains an "Add New Link" button. In the top right corner of the application, there is a "State of Connecticut" dropdown menu.



# Navigation



The screenshot shows the CT SOURCE web application interface. At the top right, it says "State of Connecticut" with a dropdown arrow. Below this is a dark blue navigation bar with a home icon and several menu items: "Solicitations", "Contracts", "Approval", "Analytics", "Vendors", and "Admin". The "Solicitations" menu is expanded, showing a list of options: "Formal Solicitations" (with sub-items "Create", "View Current", "Review / Award", "View Archived"), "Informal Solicitations" (with sub-items "Create", "View Current", "Review / Award", "View Archived"), "Solicitation Import", and "Solicitation Search (New)". To the right of the navigation bar is a "My Links" section with an "Add New Link" button. The background of the page is white with some faint text and links visible.



# Navigation



The screenshot shows the CT SOURCE web application interface. At the top right, it says "State of Connecticut" with a dropdown arrow. Below this is a dark blue navigation bar with a home icon and several menu items: "Solicitations", "Contracts", "Approval", "Analytics", "Vendors", and "Admin". The "Contracts" menu is currently open, showing a dropdown list with the following options: "Create new", "View Current", "View Archived", and "Contract Search (NEW)". Below the "Contract Search (NEW)" option, there are two links: "https://webprocure-stage.perfect.com/wp-web-public/en/#/bidboard/search?searchterm=\*&customerid=51" and "https://webprocure-stage.perfect.com/wp-web-public/en/#/contractboard/search?searchterm=\*&customerid=51". To the right of the navigation bar is a "My Links" section with an "Add New Link" button.



# Navigation



The screenshot shows the CT SOURCE web application interface. At the top right, it says "State of Connecticut" with a dropdown arrow. Below this is a dark blue navigation bar with a home icon and several menu items: "Solicitations", "Contracts", "Approval", "Analytics", "Vendors", and "Admin". The "Approval" menu is currently selected, and a dropdown menu is open showing "Approval Inbox" and "Reviewer Inbox". Below the navigation bar, there are two main content areas. The left area is titled "News and Information!" and contains a welcome message and two links to bid and contract board search pages. The right area is titled "My Links" and contains an "Add New Link" button.



# Navigation



The screenshot shows the CT SOURCE web application interface. At the top right, it displays "A CTsource Training Entity" and the user name "Geri-Lynne Gagne". The main navigation bar includes a home icon and menu items for "Solicitations", "Contracts", "Approval", "Analytics", "Vendors", and "Admin". The "Analytics" menu is expanded, showing "Execute Reports" and "Create Report". Below the navigation bar, there are two main content areas: "News and Information!" and "My Links".

**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](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](https://webprocure-stage.perfect.com/wp-web-public/en/#/contractboard/search?searchterm=*&customerid=51)

**My Links**

× <https://portal.ct.gov/DAS/CTSource/CTSource>

[Add New Link](#)





# Navigation



The screenshot displays the CT SOURCE web application interface. At the top right, it identifies the user as "A CTsource Training Entity" and "Geri-Lynne Gagne". The main navigation bar includes a home icon and dropdown menus for "Solicitations", "Contracts", "Approval", "Analytics", "Vendors", and "Admin". The "Vendors" menu is currently open, showing "Manage Vendors" and "View Vendors" options. Below the navigation bar, the page is divided into two main sections. The left section, titled "News and Information!", contains a welcome message and two links to the State of CT Bid Board and Contract Board stage links. The right section, titled "My Links", shows a single link to "https://portal.ct.gov/DAS/CTSource/CTSource" and an "Add New Link" button.



# Navigation



The screenshot displays the CT SOURCE web application interface. At the top left is the CT SOURCE logo. In the top right corner, it says "A CTsource Training Entity" with a dropdown arrow. Below this is a dark blue navigation bar with a home icon and menu items: Solicitations, Contracts, Approval, Analytics, Vendors, and Admin. The Admin menu is currently selected, and a dropdown menu is open showing "Enterprise Administration". Below the navigation bar, the main content area is titled "News and Information!". It contains a "Welcome to WebProcure!!" message and two links for "State of CT Bid Board Stage Link" and "State of CT Contract Board Stage Link", both pointing to a specific URL with search parameters. On the right side of the main content area, there is a "Link Management" section with a search bar containing the URL "https://portal.ct.gov/DAS/CTSource/CTSource" and an "Add New Link" button.



# User Set Up



A CTsource Training Entity

Home Solicitations Contracts Approval Analytics Vendors Admin

Organizations

Hierarchical View / [List View](#)

A CTsource Training Entity

Organization: Action:

Welcome to the Administration Tool Entry Screen

Please select an **Organization** and then an **Action** from the Menus on the left.

Administration Menu

- Organization Information
- Workflow
- Users
- Suppliers
- Configure Documents
- Bill To Addresses
- Ship To Addresses
- Budget Codes
- Contact Configuration
- Address Configuration
- Document Tools
- Invoice Configuration



# User Set Up



The screenshot shows the CT SOURCE web application interface. At the top, there is a navigation bar with a home icon and dropdown menus for 'Solicitations', 'Contracts', and 'Approval'. Below this is a header for 'Organizations' with a sub-header 'Organization: A CTsource Training Entity'. The main content area is divided into two sections: 'Organizations' and 'Administration Menu'. The 'Administration Menu' is expanded, showing a list of options: '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 'Users' option is highlighted with a red circle. A sub-menu is open for 'Users', containing the following options: 'Edit Users', 'Create New User', 'Add Existing User', and 'Bulk Propagate Users'. The 'Edit Users' and 'Create New User' options are also circled in red, with a red arrow pointing from the 'Users' menu item to the 'Edit Users' option.



# User Set Up



The screenshot shows the CT SOURCE web application interface. At the top, there is a navigation bar with a home icon and dropdown menus for 'Solicitations', 'Contracts', and 'Approval'. Below this, the 'Organizations' section is active, showing a hierarchical view of 'A CTsource Training Entity'. The 'Administration Menu' is visible on the left, with 'Users' highlighted. A dropdown menu is open over the 'Users' item, listing options: 'Edit Users', 'Create New User' (circled in red), 'Add Existing User', and 'Bulk Propagate Users'. The main content area on the right is currently blank, with the text 'Organization: A CTsource Training Entity' at the top.



# User Set Up



State of Connecticut

Solicitations Contracts Approval Analytics Vendors Admin

Organization: State of Connecticut Action: Create New User


### New User under State of Connecticut


#### User Information

First Name  Middle Initial  (optional)

Last Name

Email Address

Phone Number  

Fax Number   (optional)

Address   
 (optional)  
 (optional)

City

Country

State

Other Region   
(NON US/Canada/Mexico only)

ZIP

Time Zone  (GMT-05:00) Eastern Time

External System ID  (optional)

Require Password Change on Next Login

Locked Out  Unlocked

Suspended / Authorized  Authorized

Save Close Reset

Top



# User Set Up



The screenshot shows the CT SOURCE application interface. At the top, there is a navigation bar with a home icon and dropdown menus for 'Solicitations', 'Contracts', and 'Approval'. Below this is a section for 'Organizations' with a 'Hierarchical View / List View' link and a list containing 'A CTsource Training Entity'. To the right, it says 'Organization: A CTsource Training Entity'. Below the organizations section is an 'Administration Menu' with various options: 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 'Users' option is highlighted, and a sub-menu is open with the following items: 'Edit Users' (circled in red), 'Create New User', 'Add Existing User', and 'Bulk Propagate Users'.



# User Set Up



State of Connecticut

Organization: State of Connecticut Action: Edit Users

## Edit Users in State of Connecticut

Search for Users

Username:

Email:

Last Name:

No users have found matching your search criteria. If you would like to see all the users, type \* in the username field and press on search.





# User Set Up



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

Organization: State of Connecticut Action: Edit Users

## Edit Users in State of Connecticut

Search for Users

Username:

Email:

Last Name:

Find Reset

### Search Results

UID ▲	Username ↕	Name ↕	Email ↕	Edit	Remove	Copy User
352606						

◀ Previous 1 Next ▶



# User Set Up



State of Connecticut

Solicitations Contracts Approval Analytics Vendors Admin

Organization: State of Connecticut Action: Edit Users

### User Information

First Name  Middle Initial  (optional)

Last Name

Email Address

Phone Number  314-620-6093

Fax Number  (optional)

Address  450 Columbus Blvd

(optional)

(optional)

City  Hartford

Country  United States

State  Connecticut

Other Region  (NON US/Canada/Mexico only)

ZIP  06103

Time Zone  (GMT-05:00) Eastern Time

External System ID  (optional)

Require Password Change on Next Login

Locked Out  Unlocked

Suspended/Authorized  Authorized

Status:  Active

Activation Date:

Create Date: Jan 31, 2020

Last Login Date: Nov 10, 2020

Last Password Change Date: Nov 10, 2020

Login Name: drosect

Change Password  Save  Close  Delete  Reset

Top



# User Set Up



State of Connecticut

Solicitations Contracts Approval Analytics Vendors Admin

Organization: State of Connecticut Action: Edit Users

### User Information

First Name [ ] Middle Initial [ ]  
Last Name [ ]  
Email Address [ ]  
Phone Number 314-620-6093  
Fax Number [ ] (optional)  
Address 450 Columbus Blvd  
City Hartford  
Country United States  
State Connecticut  
Other Region (NON US/Canada/Mexico only) [ ]  
ZIP 06103  
Time Zone (GMT-05:00) Eastern Time  
External System ID [ ]  
Require Password Change on Next Login   
Locked Out  Unlocked  
Suspended / Authorized  Authorized  
Status: Active  
Activation Date: [ ]  
Create Date: Jan 31, 2020  
Last Login Date: Nov 10, 2020  
Last Password Change Date: Nov 10, 2020  
Login Name: drosect

[Change Password](#) [Save](#) [Close](#) [Delete](#) [Reset](#)

Top

State of Connecticut

Solicitations Contracts Approval Analytics Vendors Admin

Organization: State of Connecticut Action: Edit Users

### User Information

First Name [ ]  
Last Name [ ]  
Email Address [ ]  
Phone Number 314  
Fax Number [ ]  
Address 450  
City Hartford  
Country United States  
State Connecticut

#### Password

Please Note : Passwords must be at least 8 characters in length, must be a mix of upper-case letters, lower-case letters, numbers, and special characters, and must not be the same as any password used within the past five (5) generations.

Password [ ]  
Verify Password [ ]

[Update](#) [Cancel](#)



# CTsource Training



This concludes Training 1. Trainings 2 & 3 will be **LIVE** (on-line) training events in **webinar** format with a **LIVE** Question & Answer segment at the end of each training.

**Training 2: Solicitations** is scheduled for *January 20, 2021*

**Training 3: Contracts/Master Agreements** is scheduled for *January 27, 2021*

Both trainings will be recorded for those who cannot attend the training events to view at a later date. Links to the recordings will be posted @

<https://portal.ct.gov/DAS/CTSource/CTSource>

**Thank you!**